IMPLEMENTING CRM FOR RESULD TRACKING OF A CANDIDATE WITH INTERNAL MARKS

1 INTRODUCTION

1.1Overview

Salesforce a cloud-based Customer Relationship Management (CRM) platform that enables businesses to manage customer data, sales operations, and marketing campaigns. Salesforce is your customer success platform, designed to help you sell, service, market,analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud .So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this.

1)if we create salesforce developer organation in first milestone.

2)if we create activation application in second milestone and create custom object

Salesforce objects are database tables that permit you to store data that is specific to an organisation. Salesforce objects are of two types:

Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports,
dashboards, etc.

3)if we create fields and relationship in third milestone

An object relationship in Salesforce is a two-way association between two objects.Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

4)if we create candidate internal result card app in third milestone.

Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

5)if we create users in fourth milestone

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

6)if we create reports in fiveth milestone

A report is a list of records that meet the criteria you define. It's displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write

7) if we create dashboards in sixth milestone

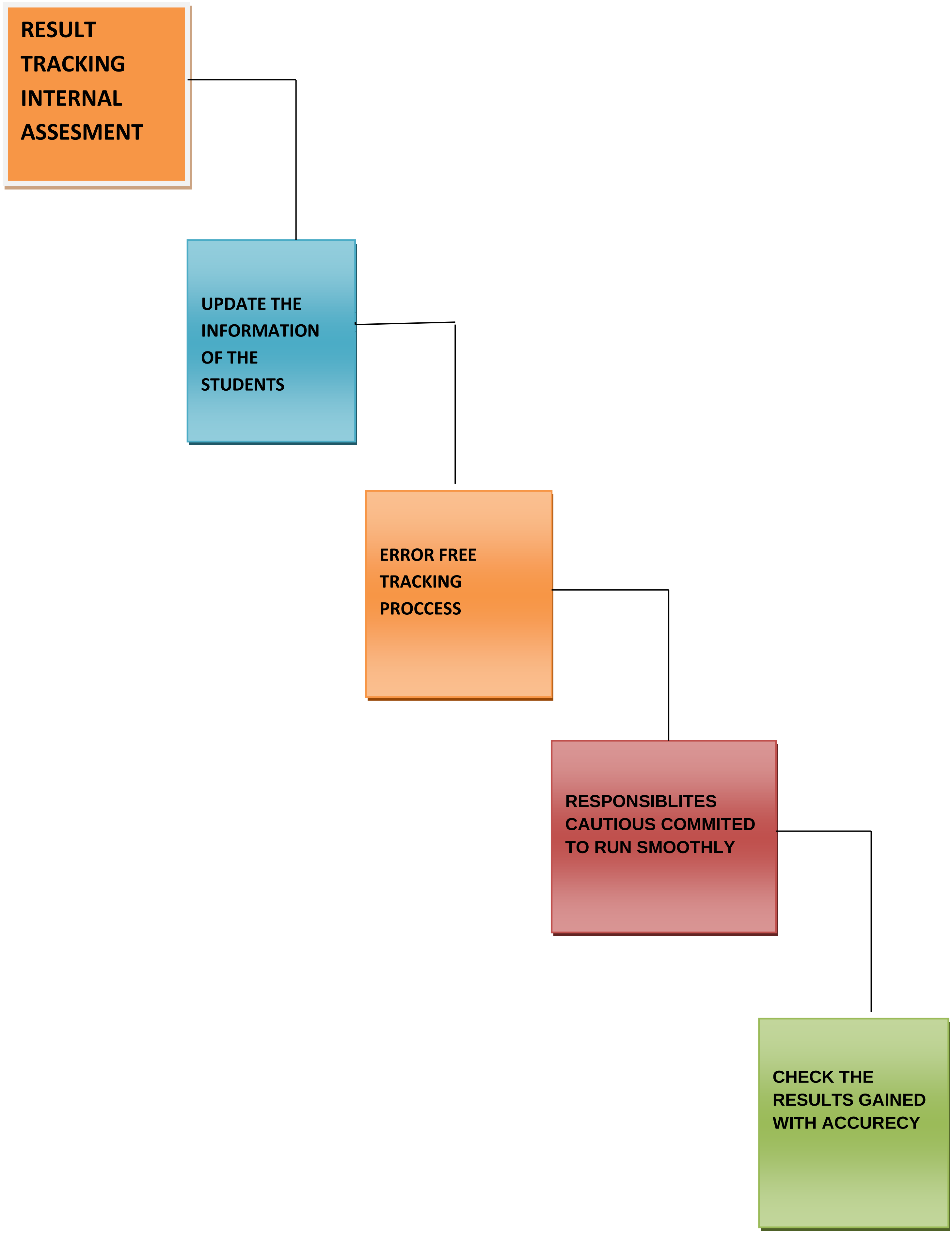
Dashboards let you curate data from reports using charts, tables, and metrics.If your colleagues need more information, then they're able to view your dashboard's data-supplying reports. Dashboard filters make it easy for users to apply different data perspectives to a single dashboard.

1.2 Purpose

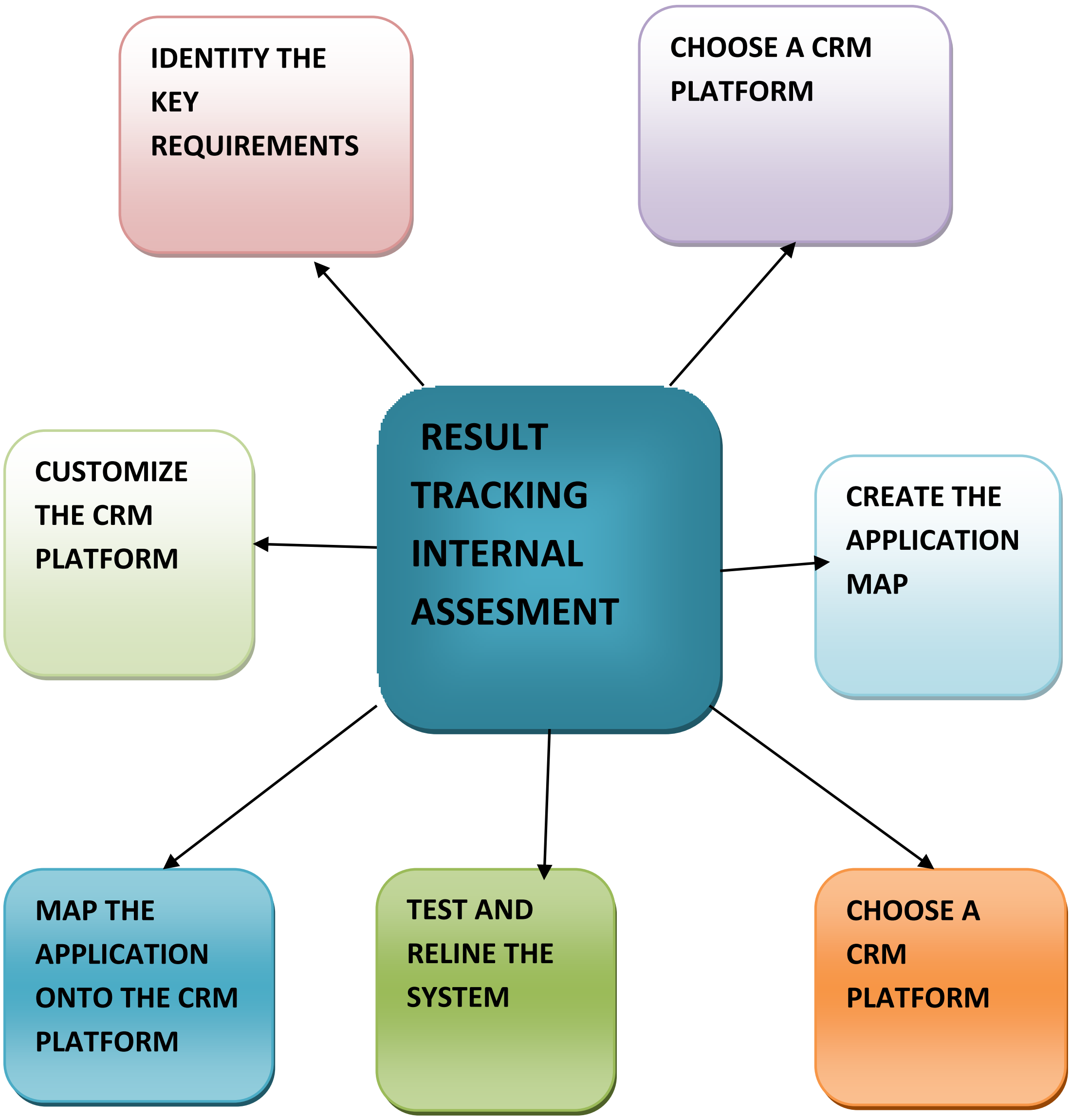
Administrator should be able to create all base data including Semester, Candidate,Course and Lecturer ,Lecturer should have the ability to create Internal Results,Dean,who is one of the Lecturer, should be the only one with ability to update Internal Results,Re-evaluation Can be initialised by Candidate for all Internal Results.Now
only dean can update the marks after re- evaluation.

2 PROBLEM DEFINITION & DESIGN THINKING

2.1 Empathy Map


RESULT TRACKING INTERNAL ASSESMENT
UPDATE THE INFORMATION OF THE STUDENTS
ERROR FREE TRACKING PROCCESS
RESPONSIBLITES CAUTIOUS COMMITED TO RUN SMOOTHLY
CHECK THE RESULTS GAINED WITH ACCURECY

2.2 Ideation & Brainstorming Map



Identify the key requirements:

First you need to identify the key requirements for the CRM system. These might include the ability to track candidate results and internal marks, view and manage candidate data, generate reports, and automate workflows.

Choose a CRM platform:

Once you have identified the key requirements, you need to choose a CRM platform that can meet those requirements. Some popular CRM platforms include Salesforce, HubSpot, and Zoho CRM.

Customize the CRM platform:

After choosing a CRM platform, you need to customize it to meet your specific needs. This might involve creating custom fields and workflows, setting up data integrations, and configuring security settings.

Create the application map:

Next, you need to create an application map that outlines the key steps in the candidate result tracking process. This might include steps like entering candidate data, recording internal marks, generating reports, and communicating with candidates

Map the application onto the CRM platform:

Once you have created the application map, you need to map it onto the CRM platform. This might involve setting up custom workflows, automating data entry and reporting, and integrating the CRM with other systems.

Test and refine the system:

Finally, you need to test and refine the system to ensure that it is working properly. This might involve conducting user testing, troubleshooting issues, and making adjustments to the application map or CRM platform as needed. .

3 RESULT:

3.1 DATA MODEL:

Object Name	Fields in the Relationships	
Obj 1	Field Lable	Data Type
	Account	Text(80)
	Owner	Lookup(Group,User)

3.2 Activity&screenshot

Activity 1:

Creating Developer Account

Creating a developer org in salesforce.

1. Go to developers.salesforce.com/

2. Click on sign up.

3. On the sign up form, enter the following details :

a. First name & Last name

a. Email

b. Role : Developer

c. Company : College Name

d. County : India

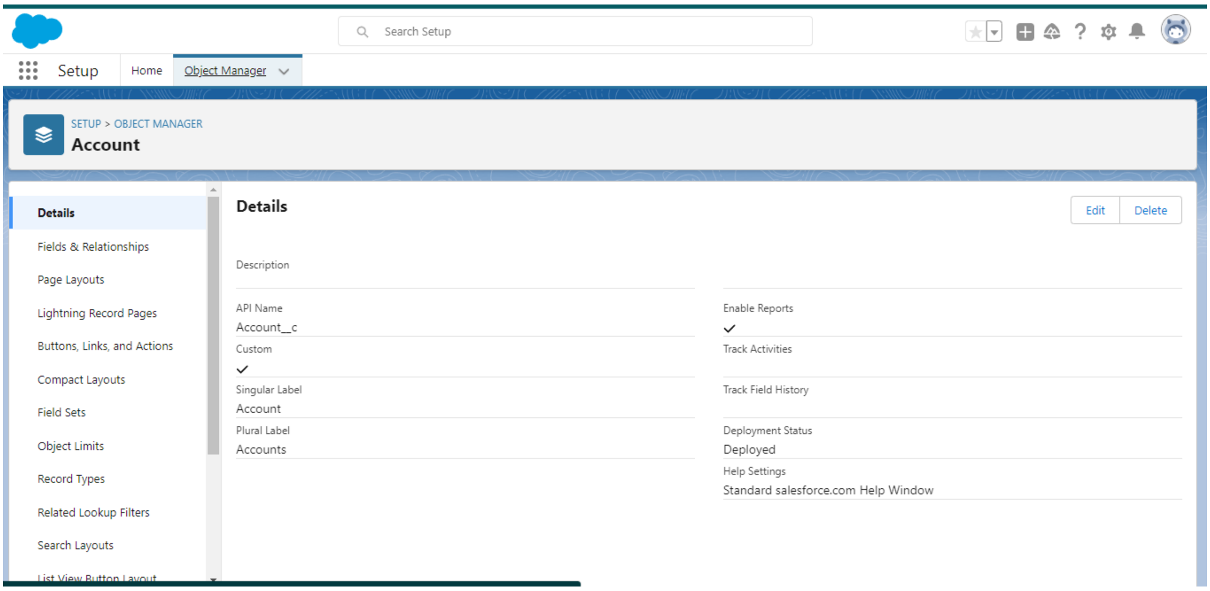
e. Postal Code : pin code

f. Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format :

username@organization.com

Click on sign up after filling these

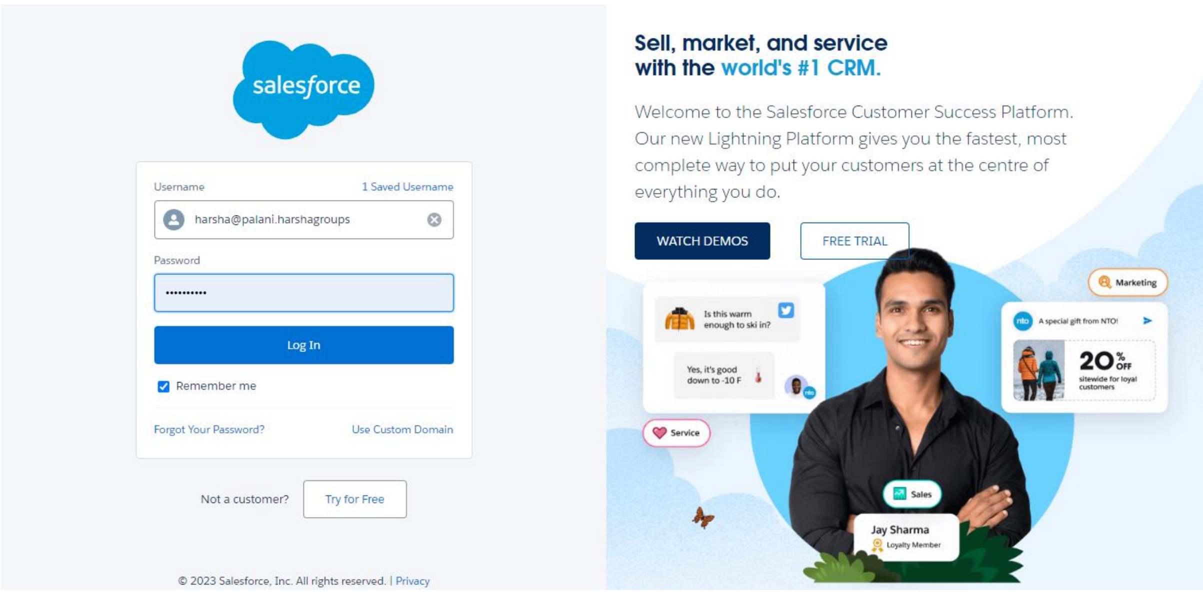


Login To Your Salesforce Account

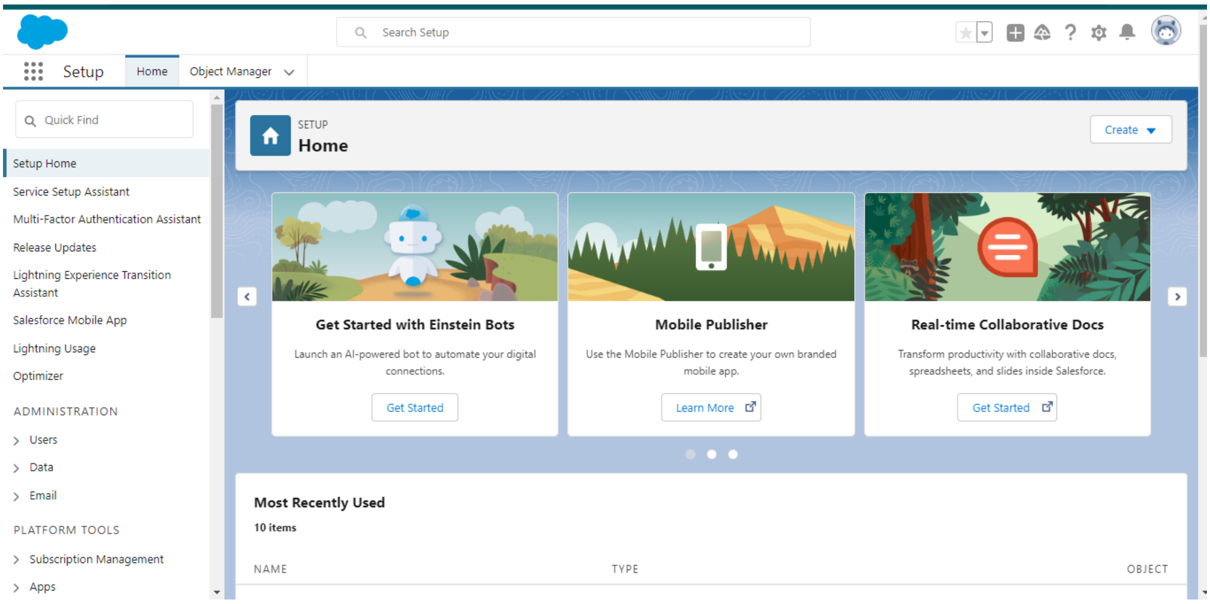
1. Goto salesforce.com and click on login.

2.Enter the username and password that you just created.

3.After login this is the home page which you will see.



Salesforce Login
https://login.salesforce.com



Milestone-2:Object

Activity-1:

To Create an object:

Creation of Objects for Candidate Internal Result Card, For this Candidate Internal Result Card we need to create 5 objects i.e Semester,Candidate,Course Details,Lecturer Details,Internal Results.

The below steps will assist you in creating those objects.

- Click on the gear icon and then select Setup.
- Click on the object manager tab just beside the home tab.
- After the above steps, have a look on the extreme right you will find a Create

Dropdown click on that and select Custom Object.

On the Custom Object Definition page, create the object as follows:

- Label: Semester
- Plural Label: Semesters
- Record Name: Semester Name
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.
- Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select

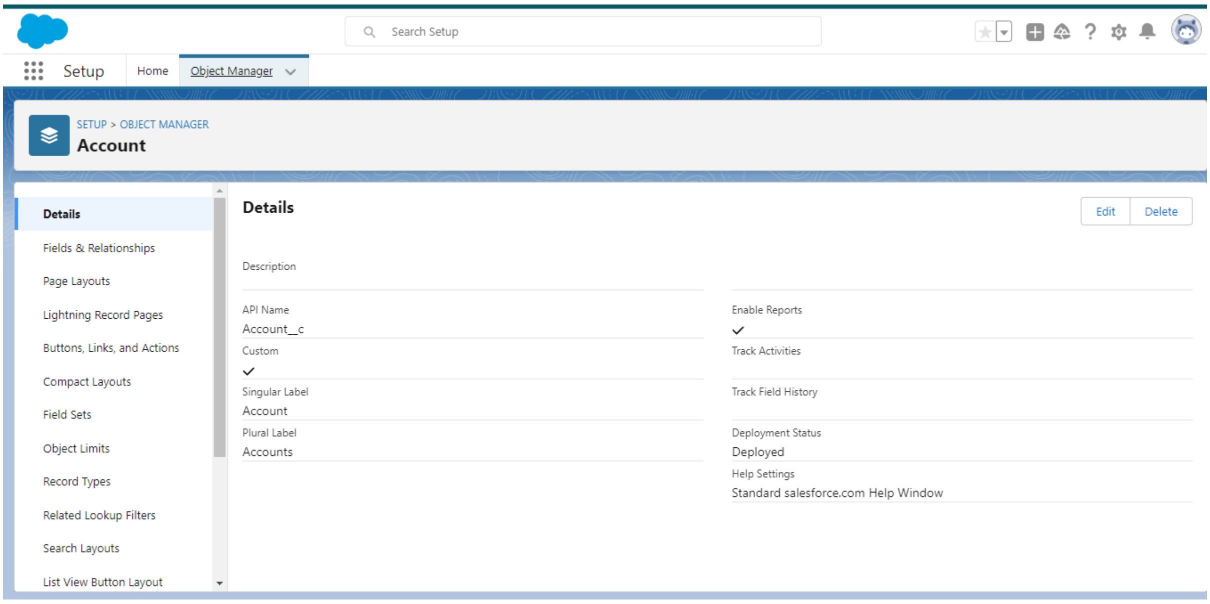
Tabs.

- Under Custom Object Tabs, click New.
- For Object, select Semester.
- For Tab Style, select any icon.
- Leave all defaults as is. Click Next, Next, and Save.

To Navigate to Setup page:

Click on gear icon → click setup.

To



Milestone -2:Fields and Relationship

Activity-1:

Creation of fields:

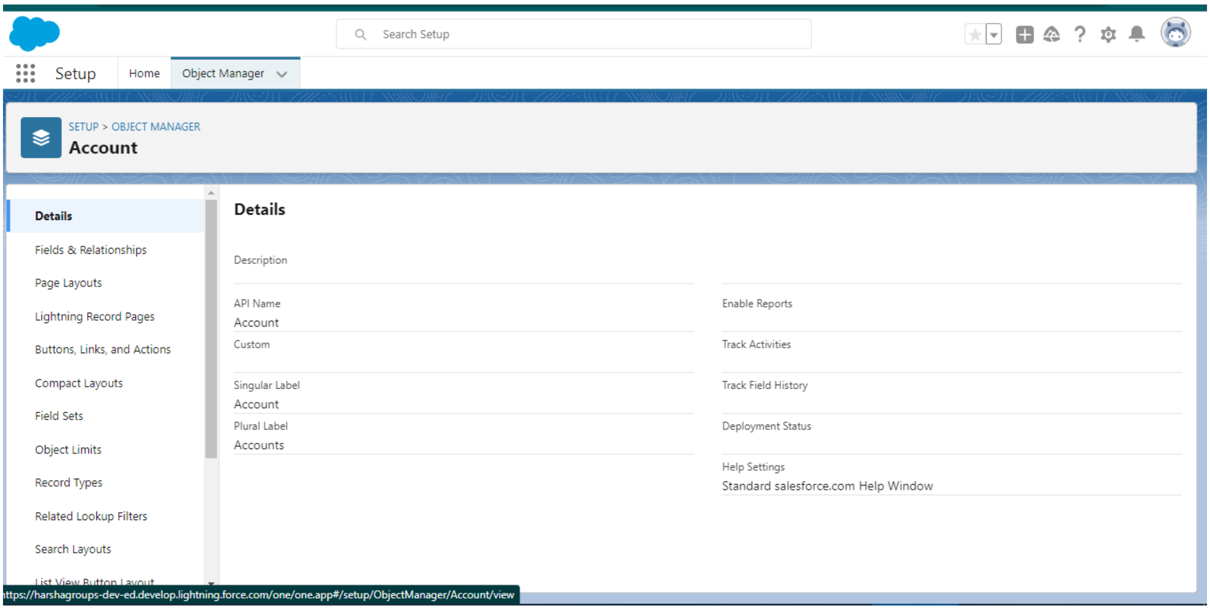
- Click the gear icon and select Setup. This launches Setup in a new tab.
- Click the Object Manager tab next to Home.
- Select Semester.
- Select Fields & Relationships from the left navigation, and click New

Now ready to make a custom field. Let's do this!

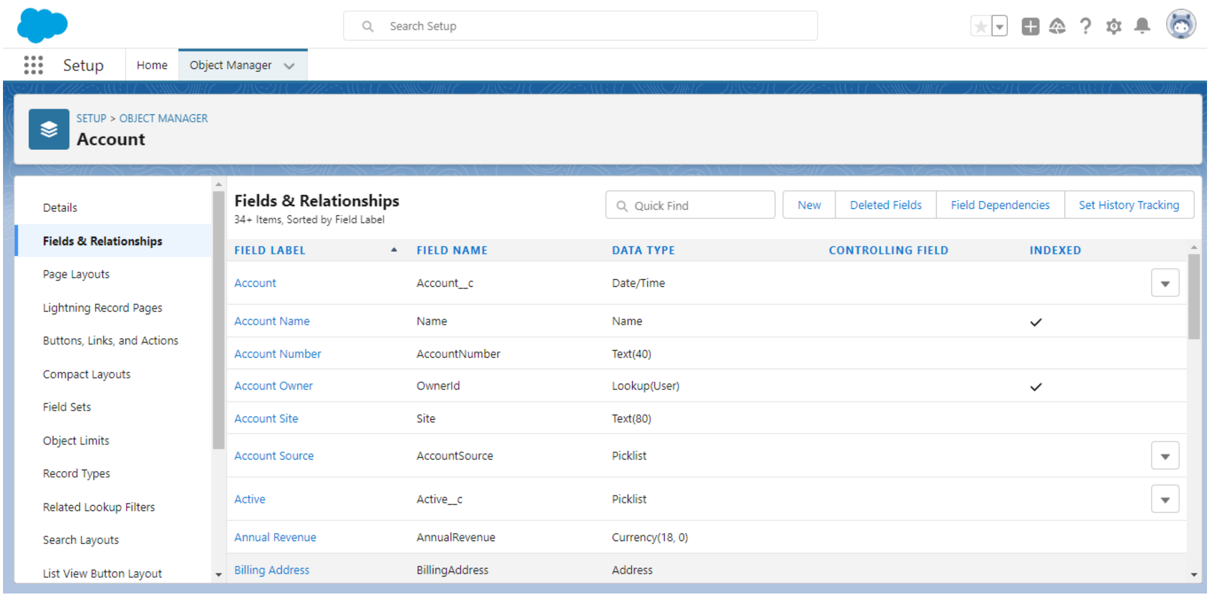
- Select the Text as the Data Type, then click Next.
- For Field Label, Enter Semester Name.
- Click Next, Next, then Save

To create fields in an object:

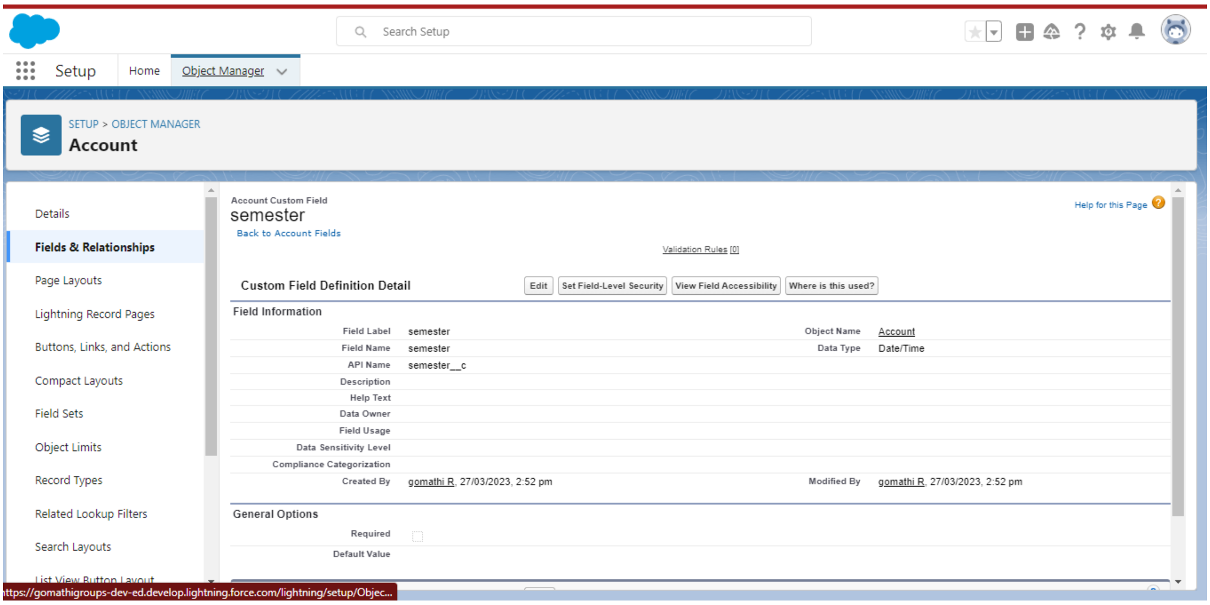
Go to setup → click on Object Manager → type object name in search bar → click on the object.

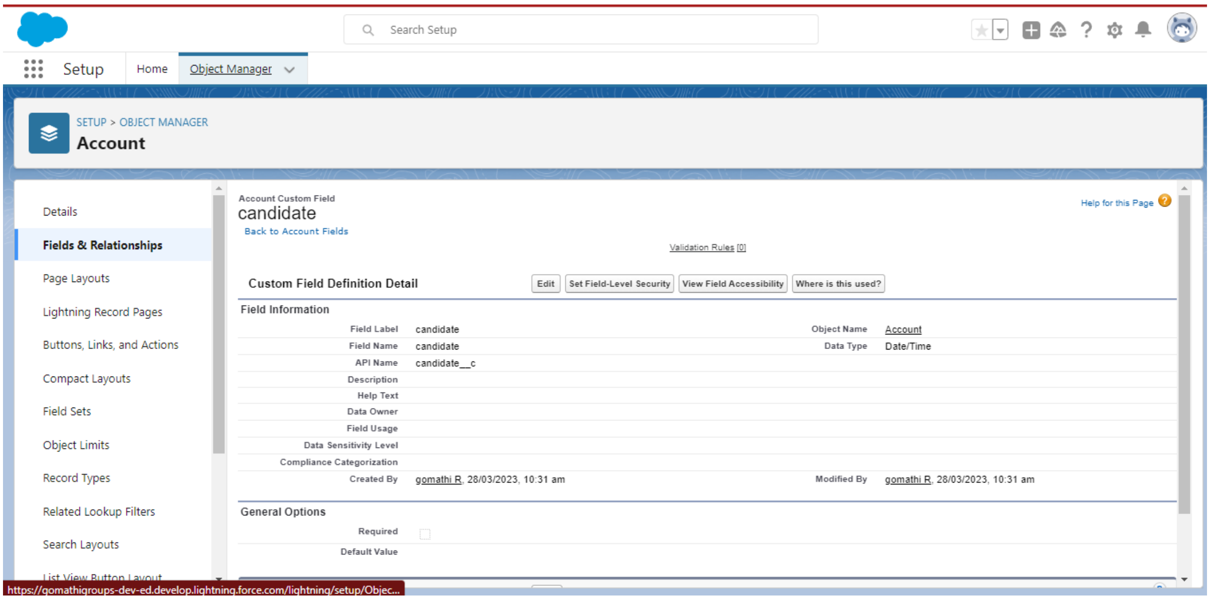


Now click on “Fields & Relationships” → New



Activity-2 :Similarly Create following according to the objects.


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Account
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Account Custom Field
semester
Back to Account Fields
Help for this Page
Validation Rules [0]
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label semester
Object Name Account
Field Name semester
Data Type Date/Time
API Name semester__c
Description
Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Created By gomathi R, 27/03/2023, 2:52 pm
Modified By gomathi R, 27/03/2023, 2:52 pm
General Options
Required
Default Value
ttps://gomathigroups-dev-ed.develop.lightning.force.com/lightning/setup/Objec...


Search Setup
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Compact Layouts
Field Sets
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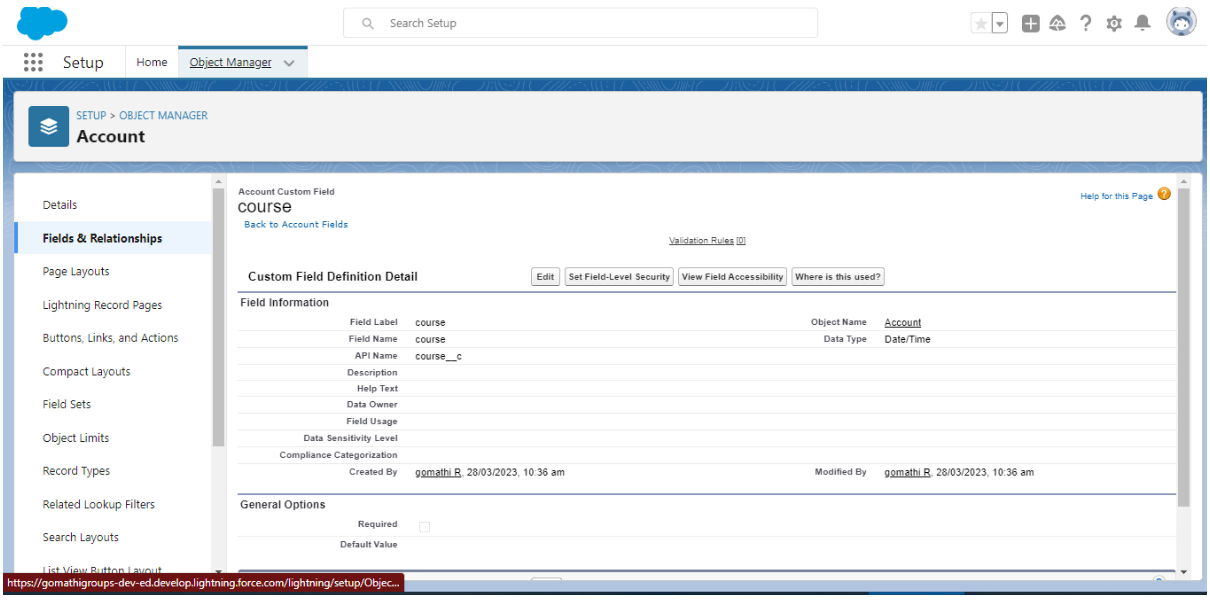
Record Types
Related Lookup Filters
Search Layouts
Account Custom Field
candidate
Back to Account Fields
Help for this Page
Validation Rules [0]
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label candidate
Object Name Account
Field Name candidate
Data Type Date/Time
API Name candidate__c
Description
Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Created By gomathi R, 28/03/2023, 10:31 am
Modified By gomathi R, 28/03/2023, 10:31 am
General Options
Required
Default Value
https://gomathigroups-dev-ed.develop.lightning.force.com/lightning/setup/Objec...


Search Setup
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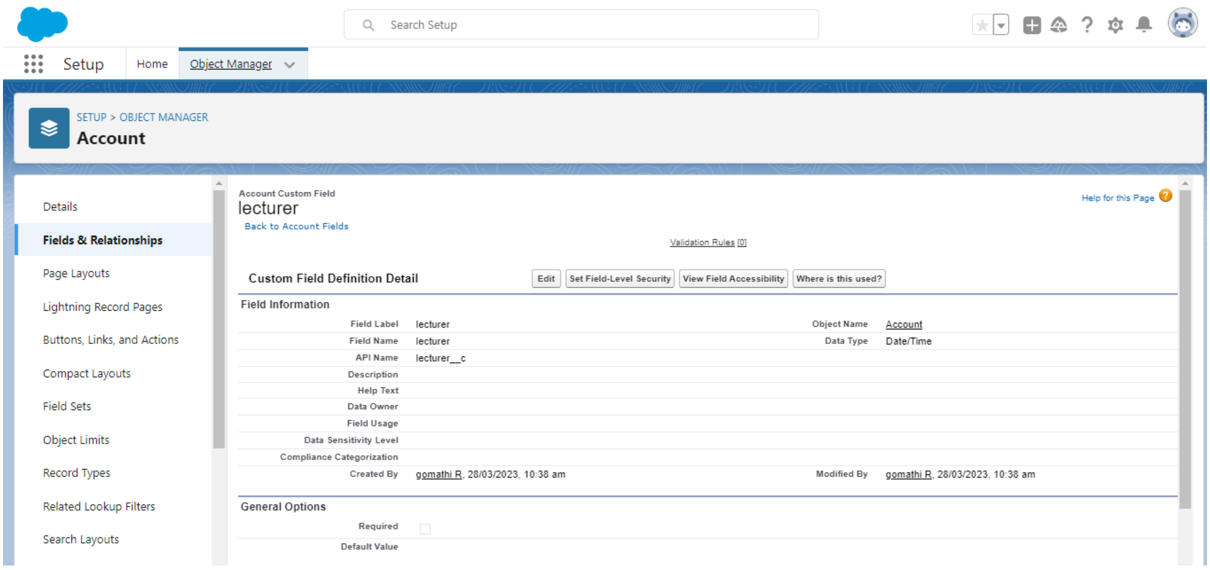
Account Custom Field
course
Back to Account Fields
Help for this Page
Validation Rules [0]
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label course
Object Name Account
Field Name course
Data Type Date/Time
API Name course__c
Description
Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Created By gomathi R, 28/03/2023, 10:36 am
Modified By gomathi R, 28/03/2023, 10:36 am
General Options
Required
Default Value
https://gomathigroups-dev-ed.develop.lightning.force.com/lightning/setup/Objec...


Search Setup
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Object Manager
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Compact Layouts
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Record Types
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Search Layouts
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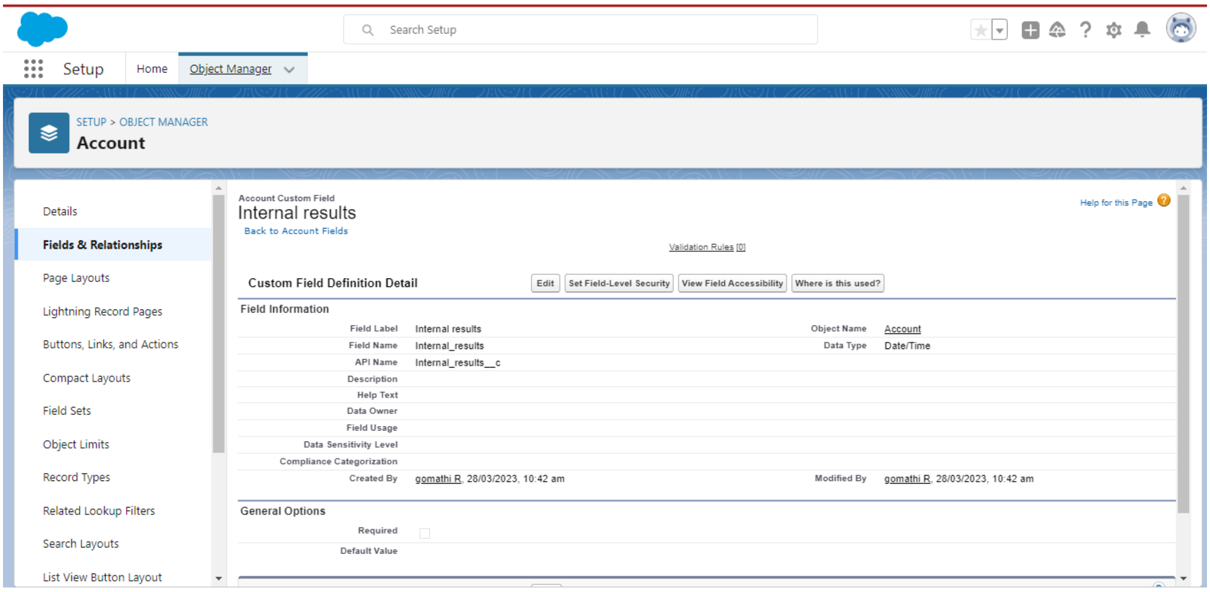
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label lecturer
Object Name Account
Field Name lecturer
Data Type Date/Time
API Name lecturer__c
Description
Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Created By gomathi R, 28/03/2023, 10:38 am
Modified By gomathi R, 28/03/2023, 10:38 am
General Options
Required
Default Value



Milstone -3: Lightning app

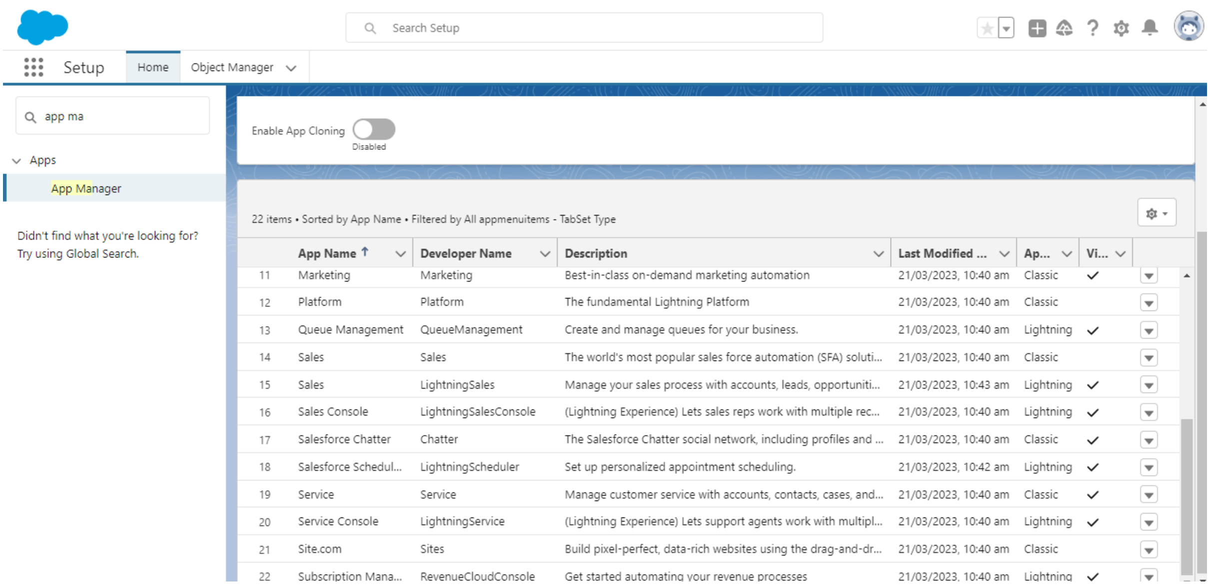
Activity-1:

Create the Candidate Internal Result Card app:

- From Setup, enter App Manager in the Quick Find and select App Manager.
- Click New Lightning App. Enter Candidate Internal Result Card as the App Name, then click Next
- Under App Options, leave the default selections and click Next.
- Under Utility Items, leave as is and click Next.
- From Available Items, select Semester,Candidate,Course Details,LecturerDetails,InternalResults and move them to Selected Items. Click Next.
- From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.
- To verify your changes, click the App Launcher, type Candidate Internal Result Card and select the Candidate Internal Result Card app.

To create a lightning app page:

Go to setup page → search “app manager” in quick find → select “app manager” → click on New lightning App.

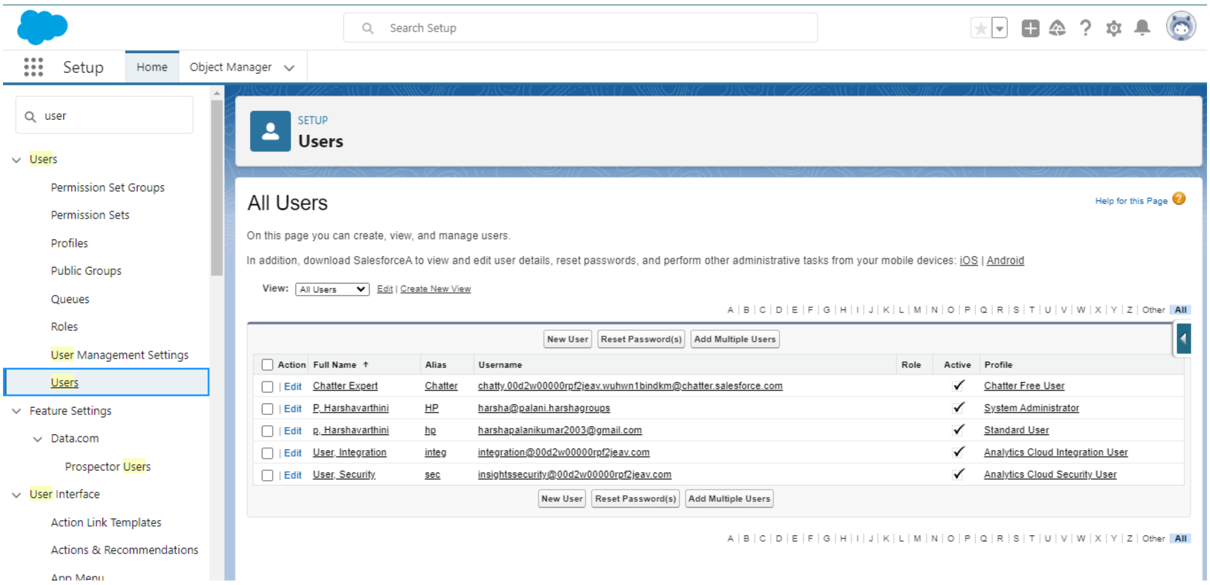


Milestone-4:Users

Creating a Activity 1:

Users:

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User.
3. Enter the user’s name John Martin and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
4. Select a **Role**(none)
5. Select a User Licence As salesforce.
6. Select a profile as Salesforce User.
7. Check Generate new password and notify the user immediately to have the user’s login name and a temporary password emailed to your email.



Milestone-5 :Reports

Activity 1:

Reports and dashboards:

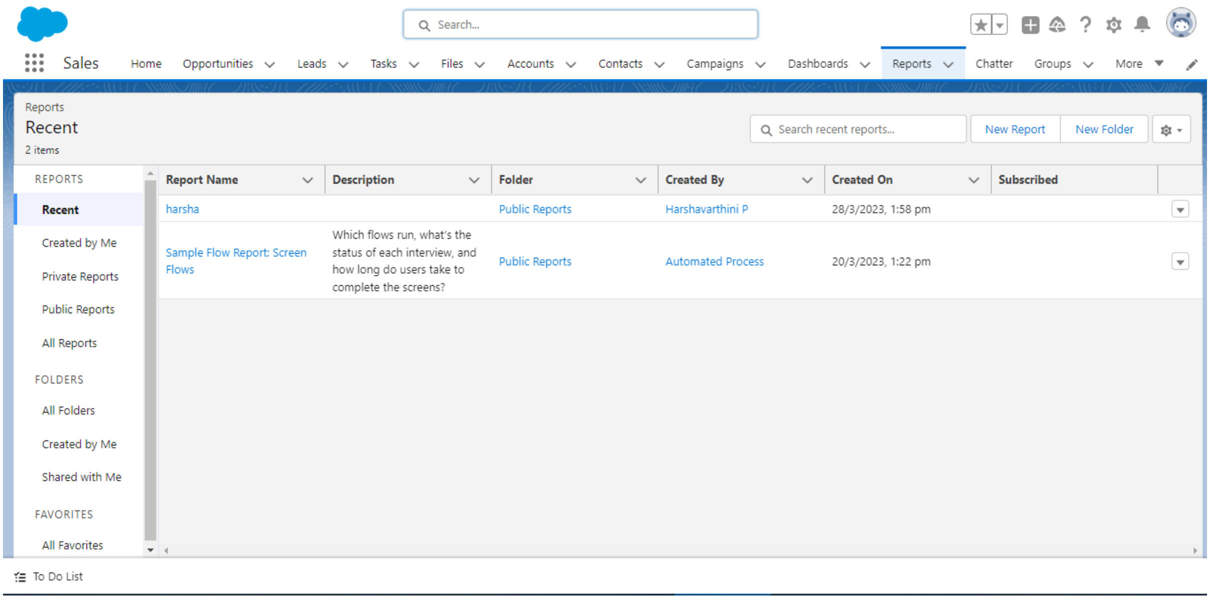
1. From the Reports tab, click New Report.

2. Select the report type as Candidate with candidate Marks for the report, and click Create.

3. Customise your report, then save or run it.

To create a report:

Go to the app → click on the reports tab

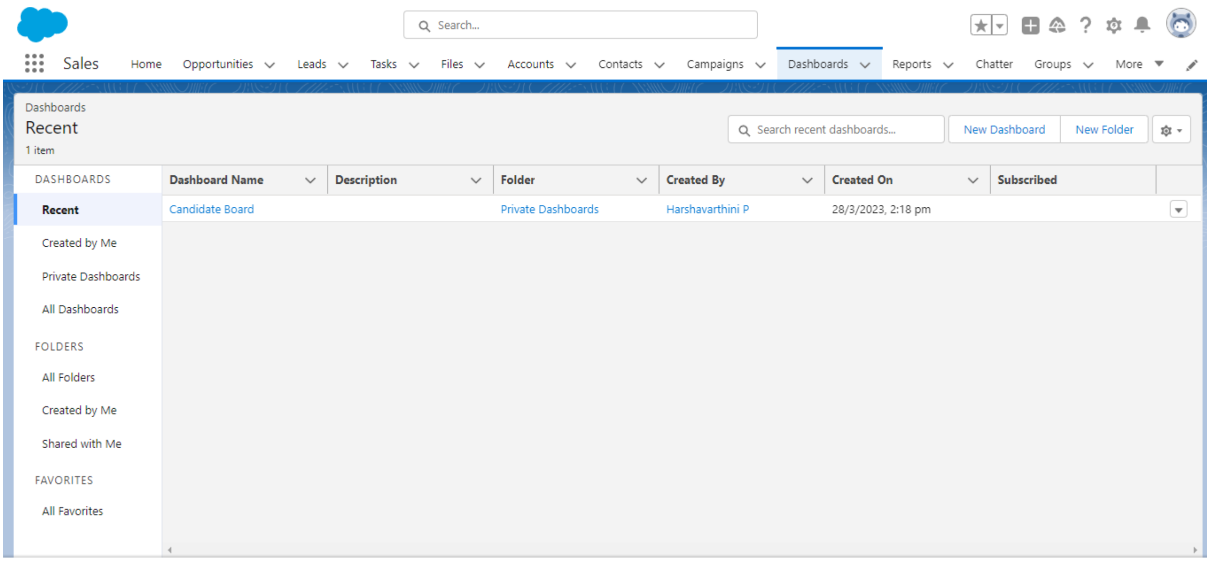


Milestone-6:Dashboards

Activity 1:

Create a Dashboard:

1. Click the Dashboards tab.
2. Click New Dashboard.
3. Name your dashboard Candidate Board . Leave all other fields as is and click Create.
4. Click + Component.
5. For Report, select Candidate Marksby Stage. Click Select. ...
6. For Display As, select Vertical Bar Chart and click Add.
7. Click Save.
8. Click Done



4 Trailhead Profile Public URL

Team Lead – https://trailblazer.me/id/harsp27

Team Member 1 – https://trailblazer.me/id/gomar20

Team Member 2 – https://trailblazer.me/id/bshree39

Team Member 3 _ https://trailblazer.me/id/dpriya124

5 ADVANTAGES & DISADVANTAGE

Advantages:

It allows for more effective sales and marketing. It can speed up the sales conversion process. It increases staff productivity, lowers time costs and boosts morale. It enables widely dispersed teams to work closely.

Can improve customer loyalty through exceptional experience**.**

The CRM software also lets a business tailor its markting communications to achieve more effective results and , hence , a greater return on invesment in sales and marketing.

A CRM system integrated within a marketing campaign allows insights into the interests of prospective customers.

All of this fits neatly in with the kind of lean management practices that high_performing businesses utilize**.**

Disadvantage:

Staff over-reliance on CRM may diminish customer loyalty through a bad experience.

Security concerns associated with centralized data.

The excess intial time and productibity cost of implementation.

It requires a process-driven sales organization.

It may not suit every business**.**

6 APPLICATION

Applicant tracking system (ATS) and candidate relationship management (CRM) software both help automate, organize, and optimize the recruitement and hiring process but knowing how, when and why to integrate each of these tolls into a talent acquisition strategy is key to maximizing their value.

7 CONCLUSION

Administrator should be able to create all base data including semester, candidate , course, lecture, should have the ability to create Internal Results , Dean, who is one the Lecturer, should be the only one with ability to update internal results , re-evaluation can be initialized by candidate for all internal results. Now only dean can update the marks after re-evaluation**.**

8 FUTURE SCOPE

The improved features of CRM software have increased both its complexity and necessity.

Nearly half of CRM implementation campaigns suffer from improper preparation and misaligned objectives among internal stakeholders.

A properly conceived CRM implementation strategy covers the breakdown of its goals, research, strategy, development and future.

This article is for small business owners who want to make sure they are taking the right steps when implementing a new CRM system.

Customer relationship management (CRM) software has evolved from a tool that helped sales teams a store customer data into a multifaceted hub that drives the technology suite of an entire business.

It can add tremendous value to tour company, but how well you integrate it with your preexisting processes will dictate its effectiveness.

The best implementation practices include focusing on your established goals, employing a dedicated team to lead the implementation, and offering training opportunities that help employees understand how to use the software when it launches.