

IMPLIMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS

INTRODUCTION:

Customer relationship management (CRM) is the combination of practices, strategies and technologies that companies use to manage and customer interactions and data throughout the customer lifecycle. The goal is to improve customer service relationships and assist in customer retention and drive sales growth.

PURPOSE:

Using Sales Cloud, you can now close more deals quickly & create strong customer relations. The largest enterprise app ecosystem that is flexible and scalable to suit any business. Get Instant Insights. Get a Free Demo. Start with \$25. Grow Your Small Business.

PROBLEM DEFINITION & DESIGN THINKING:

11:52 PM



2

Brainstorm

Write down any ideas that come to mind that address your problem statement.

⌚ 10 minutes

TIP

You can select a sticky note and hit the pencil (switch to sketch) icon to start drawing!

kavitha.A		
improve phone service	better distribution of returning customers	serve our customers' loyalty
increase customer satisfaction	monitor peaks and provide faster replies to social media	improve effectiveness of sales in offline
more effective service for key customers	increase the number of clients	optimize marketing

kavitha.M

improve the decision making process	use the available data	switch the trends
boost your efficiency	maximize up-selling	

jeevetha.M

boost sales as soon as that	plan and control your sales path	improve productivity
promote teamwork	manage your sales team	plan your meetings and manage events

kamali.D

selecting a client properly to improve project	developing a project to the purpose	Aim it to be fully clear and success
develop our knowledge to improve a project	take more activities and achieve a process	It's to the try our best to improve

Person 5

Person 6

Person 7

Person 8





Develop shared understanding and empathy

Summarize the data you have gathered related to the people that are impacted by your work. It will help you generate ideas, prioritize features, or discuss decisions.

PROBLEM What are we trying to understand better?

What is the problem we want to understand?

What is the situation they are in?

What is their role in the situation?

GOAL What do they need to DO?

What do they need to do differently?

What jobs do they need to get done?

What decisions do they need to make?

How will we know they were successful?

HOW What are their fears, frustrations, and desires?

WHAT What are their wants, needs, hopes, and dreams?

WHAT DO THEY SAY? What are they saying when they say?

What are they saying from their perspective?

What are they saying from their perspective?

What are they saying from their perspective?

WHAT DO THEY DO? What do they do to do?

What do they do to do?

What do they do to do?

What do they do to do?

WHAT DO THEY FEEL? What do they feel in their mind?

What do they feel in their mind?

What do they feel in their mind?

What do they feel in their mind?

WHAT DO THEY SAY? What do they say to say?

What do they say to say?

What do they say to say?

What do they say to say?

WHAT DO THEY SAY? What do they say to say?

What do they say to say?

What do they say to say?

What do they say to say?



RESULT:

3.1 DATA MODEL:

OBJECT NAME

OBJ 1

FIELDS IN THE OBJECT

Create an object:

Create candidate course detail, lecturer details in Internal result object.

OBJ2

Fields and relationship

Lightening app

User

3.2 ACTIVITY & SCREENSHOT:

The screenshot displays the 'New Custom Object' setup page in Salesforce. The page is titled 'New Custom Object' and includes a 'Help for this Page' link. Below the title, there is a message: 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)'. The main section is 'Custom Object Definition Edit', which includes a 'Save' button, a 'Save & New' button, and a 'Cancel' button. The 'Custom Object Information' section contains the following fields and options:

- Label:** 'mark' (Example: Account)
- Plural Label:** 'marks' (Example: Accounts)
- Starts with vowel sound:** ☐
- Object Name:** 'mark' (Example: Account)
- Description:** A text area for the object's description.
- Context-sensitive Help: Setting:** ☒ Open the standard Salesforce.com Help & Training window, ☐ Open a window using a Visualforce page
- Context Name:** A dropdown menu with 'None' selected.
- Enter Record Name Label and Format:** A section with a message: 'The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.' Below this is a field for 'Record Name' with the value 'mark Name' (Example: Account Name).

The page is viewed in a web browser with the address bar showing 'dmrgovtartsandscienceco32-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new'. The browser's taskbar at the bottom shows the Windows logo, a search bar, and several application icons. The system tray in the bottom right corner shows the date and time as '03:56 AM 31-03-2023'.

mark | Salesforce

dmgrgovtartsandscienceco32-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003kH9R/Details/view

Gmail YouTube Maps

Search Setup

Setup Home Object Manager

mark

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation Rules

Details

Description

API Name
mark__c

Custom

Singular Label
mark

Plural Label
marks

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete

Type here to search

03:57 AM
31-03-2023

Tabs | Salesforce

dmgrgovtartsandscienceco32-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.j...

Gmail YouTube Maps

Search Setup

Setup Home Object Manager

mark

Setup

Tab

User Interface

Loaded Console Tab Limit

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?
Try using Global Search.

SETUP

Tabs

New Custom Object Tab

Step 1. Enter the Details

Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#)

Object
mark

Tab Style
Airplane

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab

Splash Page Custom Link
None

Enter a short description.

Description

Next Cancel

Type here to search

04:05 AM
31-03-2023

Setup | Salesforce

dmrgovtartsandscienceco32-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fu%2FobjectCustomTabWizard.j...

Search Setup

Setup Home Object Manager

Tab

User Interface

Loaded Console Tab Limit

Rename Tabs and Labels

Didn't find what you're looking for? Try using Global Search.

New Custom Object Tab

Step 2. Add to Profiles Step 2 of 3

Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.

☒ Apply one tab visibility to all profiles (Default On)
☐ Apply a different tab visibility for each profile

Profile	Tab Visibility
Analytics Cloud Integration User	Default On
Analytics Cloud Security User	Default On
Authenticated Website	Default On
Authenticated Website	Default On
Contract Manager	Default On
Cross Org Data Proxy User	Default On
Custom: Marketing Profile	Default On
Custom: Sales Profile	Default On
Custom: Support Profile	Default On
Customer Community Login User	Default On
Customer Community Plus Login User	Default On
Customer Community Plus User	Default On

Setup | Salesforce

dmrgovtartsandscienceco32-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fu%2FobjectCustomTabWizard.j...

Search Setup

Setup Home Object Manager

Tab

User Interface

Loaded Console Tab Limit

Rename Tabs and Labels

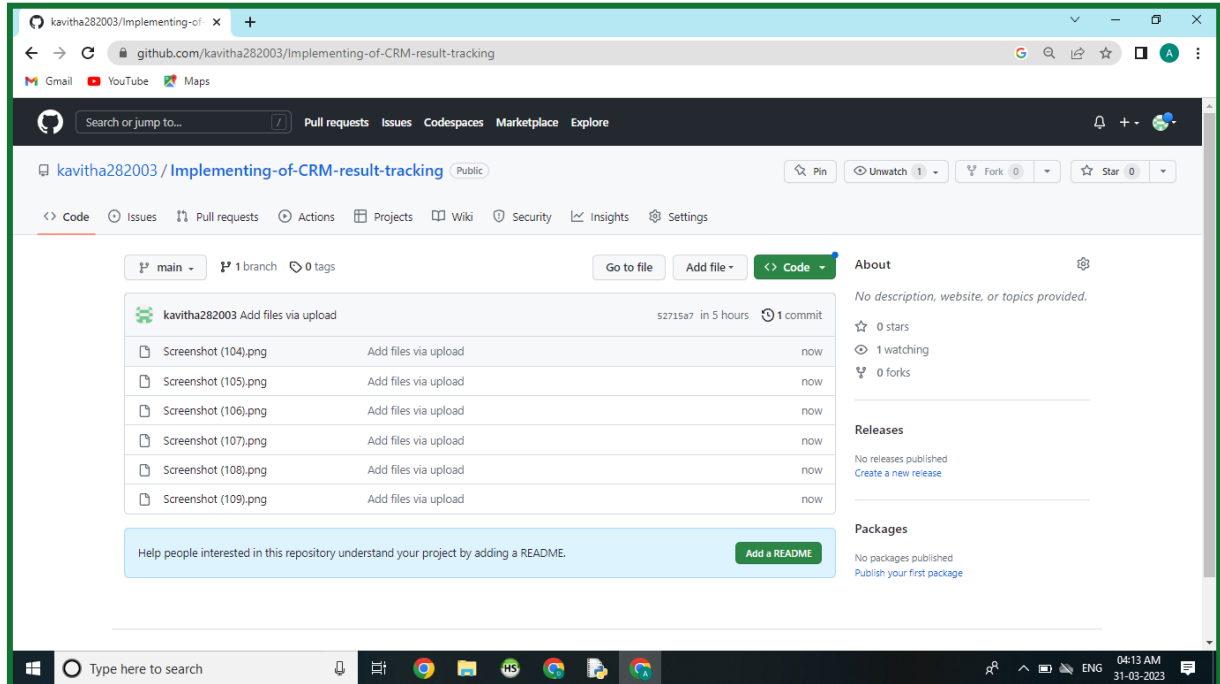
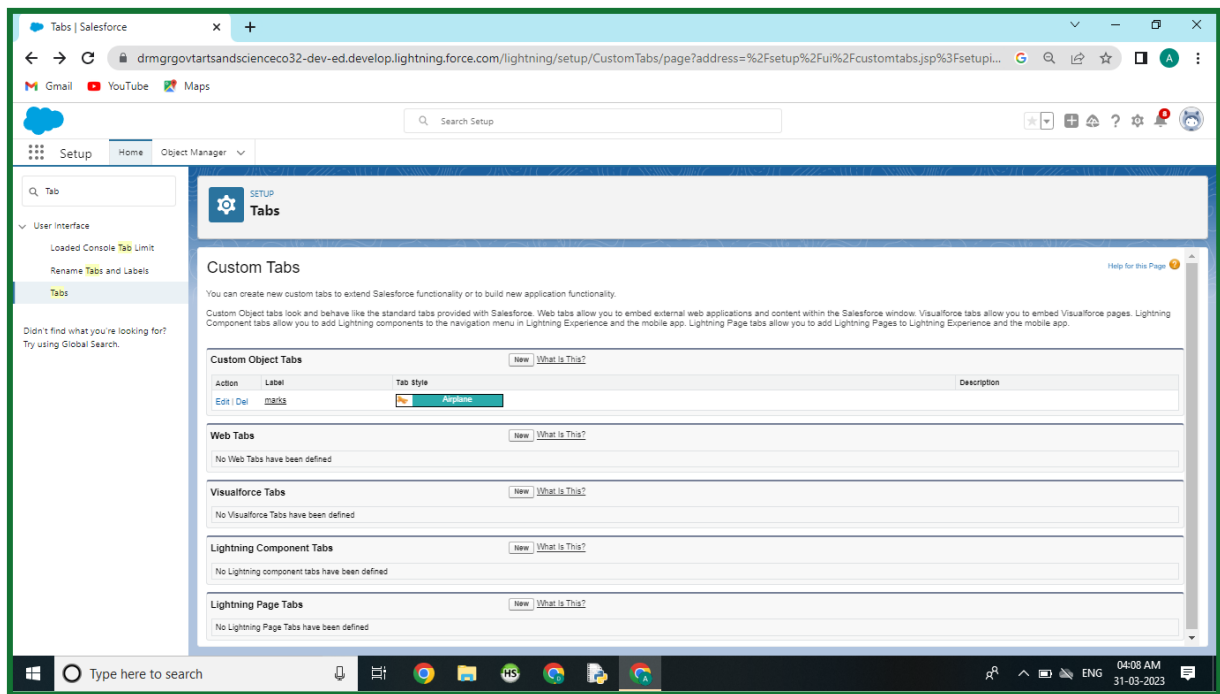
Didn't find what you're looking for? Try using Global Search.

New Custom Object Tab

Step 3. Add to Custom Apps Step 3 of 3

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	Include Tab
Platform (standard__Platform)	<input checked="" type="checkbox"/>
Sales (standard__Sales)	<input checked="" type="checkbox"/>
Service (standard__Service)	<input checked="" type="checkbox"/>
Marketing (standard__Marketing)	<input checked="" type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input checked="" type="checkbox"/>
High Volume Customer Portal User	<input checked="" type="checkbox"/>
Authenticated Website User	<input checked="" type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>
Community (standard__Community)	<input checked="" type="checkbox"/>
Site.com (standard__Sites)	<input checked="" type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>
Content (standard__Content)	<input checked="" type="checkbox"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>
Service Console (standard__LightningService)	<input checked="" type="checkbox"/>
Sales (standard__LightningSales)	<input checked="" type="checkbox"/>



mark | Salesforce

dmrgovtartsandscienceco32-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003kH9R/FieldsAndRelationships/new

Setup Search Setup

Setup > OBJECT MANAGER

mark

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

List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Specify the type of information that the custom field will contain.

Data Type

☐ None Selected Select one of the data types below.

☐ Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

☐ Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

☐ Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

☐ Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

☐ Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

☐ External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

☐ Checkbox Allows users to select a True (checked) or False (unchecked) value.

☒ Currency Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

☐ Date Allows users to enter a date or pick a date from a popup calendar.

☐ DateTime Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the DateTime field.

Type here to search

04:24 AM 31-03-2023

mark | Salesforce

dmrgovtartsandscienceco32-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003kH9R/FieldsAndRelationships/new

Setup Search Setup

Setup > OBJECT MANAGER

mark

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

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Triggers

New Custom Field

Step 2 of 4

Step 2. Enter the details

Field Label 123456

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length 15

Decimal Places 2

Field Name K123456

Description

Help Text

Required ☒ Always require a value in this field in order to save a record

Auto add to custom report type ☐ Add this field to existing custom report types that contain this entity

Default Value Show Formula Editor

Type here to search

04:24 AM 31-03-2023

mark | Salesforce

dmrggovtartsandscienceco32-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003kH9R/FieldsAndRelationships/new

Setup

mark

Details

Fields & Relationships

Page Layouts

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Scoping Rules

Triggers

New Custom Field

Step 3. Establish field-level security

Field Label: "123456"
Data Type: Currency
Field Name: X123456
Description:

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Login User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Plus Login User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Previous Next Cancel

mark | Salesforce

dmrggovtartsandscienceco32-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003kH9R/FieldsAndRelationships/new

Setup

mark

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

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Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Triggers

New Custom Field

Step 4. Add to page layouts

Field Label: "123456"
Data Type: Currency
Field Name: X123456
Description:

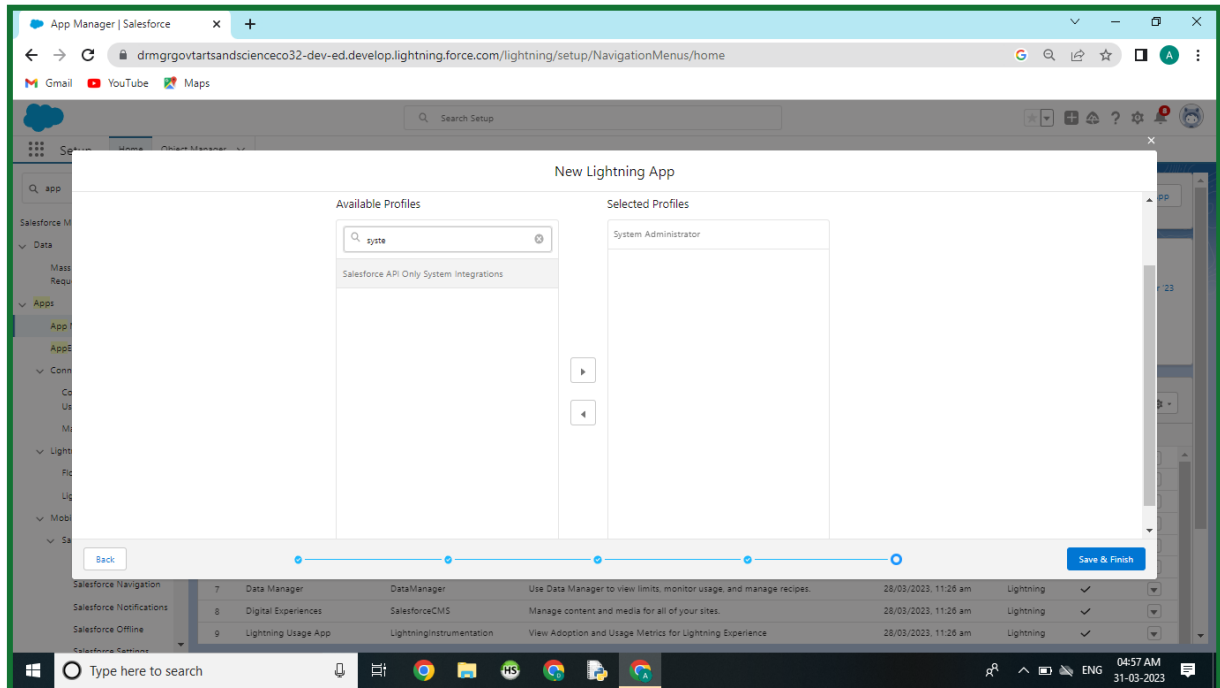
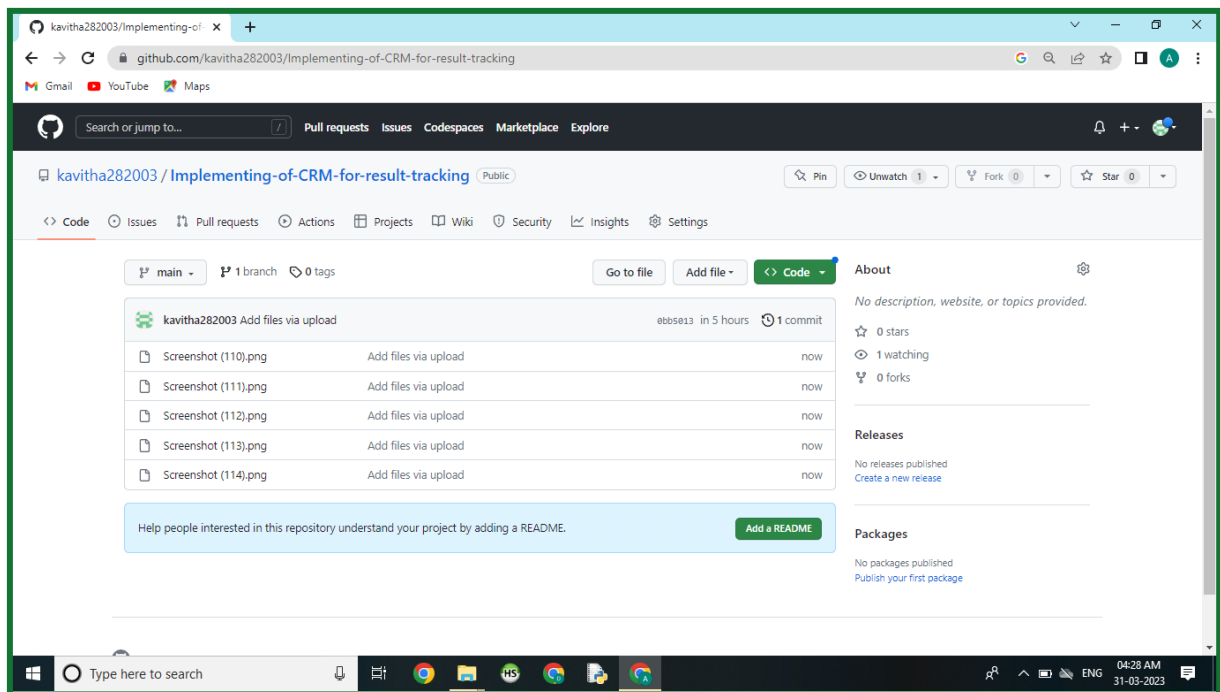
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field	Page Layout Name
<input checked="" type="checkbox"/>	mark Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel



App Manager | Salesforce

dmrggovtartsandscienceco32-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Setup Home Object Manager

Search Setup

Lightning Experience App Manager

New Lightning App New Connected App

Clone Apps(Beta)

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the [Winter '23 release notes](#).

Enable App Cloning ☐ Disabled

22 Items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

App Name ↑	Developer Name	Description	Last Modified D...	App...	Vis...
1 All Tabs	AllTabSet		28/03/2023, 11:26 am	Classic	
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	28/03/2023, 11:26 am	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	28/03/2023, 11:26 am	Classic	✓
4 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	28/03/2023, 11:29 am	Lightning	✓
5 Community	Community	Salesforce CRM Communities	28/03/2023, 11:26 am	Classic	✓
6 Content	Content	Salesforce CRM Content	28/03/2023, 11:26 am	Classic	✓
7 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	28/03/2023, 11:26 am	Lightning	✓
8 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	28/03/2023, 11:26 am	Lightning	✓
9 Implementing of CRM for result tracking	Implementing_of_CRM_for_result_tracking		31/03/2023, 10:27 am	Lightning	✓

javascriptvoid(0);

Type here to search

05:08 AM 31-03-2023

kavitha282003/Implementing-of-

github.com/kavitha282003/Implementing-of-CRM-fr-reslt-tracking

Search or jump to... Pull requests Issues Codespaces Marketplace Explore

kavitha282003 / Implementing-of-CRM-fr-reslt-tracking Public

Pin Unwatch 1 Fork 0 Star 0

Code Issues Pull requests Actions Projects Wiki Security Insights Settings

main 1 branch 0 tags

Go to file Add file <> Code About

kavitha282003 Add files via upload 4bc3592 in 5 hours 1 commit

Screenshot (116).png Add files via upload now

Screenshot (117).png Add files via upload now

Help people interested in this repository understand your project by adding a README. Add a README

About

No description, website, or topics provided.

0 stars

1 watching

0 forks

Releases

No releases published

Create a new release

Packages

No packages published

Publish your first package

Type here to search

05:10 AM 31-03-2023

Users | Salesforce

dmrgovgortartsandscienceco32-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisU...

Search Setup

Setup Home Object Manager

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

User Interface

Action Link Templates

Actions & Recommendations

SETUP Users

RELATIVE ID: User1b80b7493b842b95420

Title: Implementing CRM for result

Company: Dr.M.G.R.Govt.ARTS&SCIEI

Department: B.Sc.,statistics

Division:

Create User: ☐

Knowledge User: ☐

Flow User: ☐

Service Cloud User: ☐

Site.com Contributor User: ☐

Site.com Publisher User: ☐

WDC User: ☐

Data.com User Type: --None--

Data.com Monthly Addition Limit: Default Limit (300)

Accessibility Mode (Classic Only): ☐

High-Contrast Palette on Charts: ☐

Load Lightning Pages While Scrolling: ☒

Debug Mode: ☐

Quick Access Menu: ☒

Salesforce CRM Content User: ☐

Receive Salesforce CRM: ☐

Type here to search

06:13 AM 05-04-2023

Report Builder | Salesforce

dmrgovgortartsandscienceco32-dev-ed.develop.lightning.force.com/one/one.app#eyJjb21wb25lbnREZSWY0iYjZXBvcnRzOnJlcG9ydEJ1aWxkZXIiLCJhdHRyaWJ1dGVz...

Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups More

REPORT

New Account with Account Teams Report Account with Account Teams

Outline Filters 1

Groups

GROUP ROWS

Add group...

Columns

Add column...

Account Name

Account Name

1 GenePoint

2 United Oil & Gas, UK

3 United Oil & Gas, Singapore

4 Edge Communications

5 Burlington Textiles Corp of America

6 Pyramid Construction Inc.

7 Dickenson plc

8 Grand Hotels & Resorts Ltd

9 Express Logistics and Transport

10 University of Arizona

11 United Oil & Gas Corp.

12 sForce

To Do List

Type here to search

06:19 AM 05-04-2023

CRM | Salesforce

dmrgovtartsandscienceco32-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01Z2w000000uytDEAQ/edit?navigationLocation=LIST_VIEW_ROW&layo...

Gmail YouTube Maps

Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups More

CRM + Component + Filter Save Done

New Account with Account Teams Report

Account Name ↑

- Burlington Textiles Corp of America
- Dickenson plc
- Edge Communications
- Express Logistics and Transport
- GenePoint
- Grand Hotels & Resorts Ltd
- Pyramid Construction Inc.

View Report (New Account with Account Teams Report)

To Do List

Type here to search

06:22 AM 05-04-2023

CRM | Salesforce

dmrgovtartsandscienceco32-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01Z2w000000uytDEAQ/edit?navigationLocation=LIST_VIEW_ROW&layo...

Gmail YouTube Maps

Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups More

CRM + Component + Filter Save Done

New Account with Account Teams Report

Account Name ↑

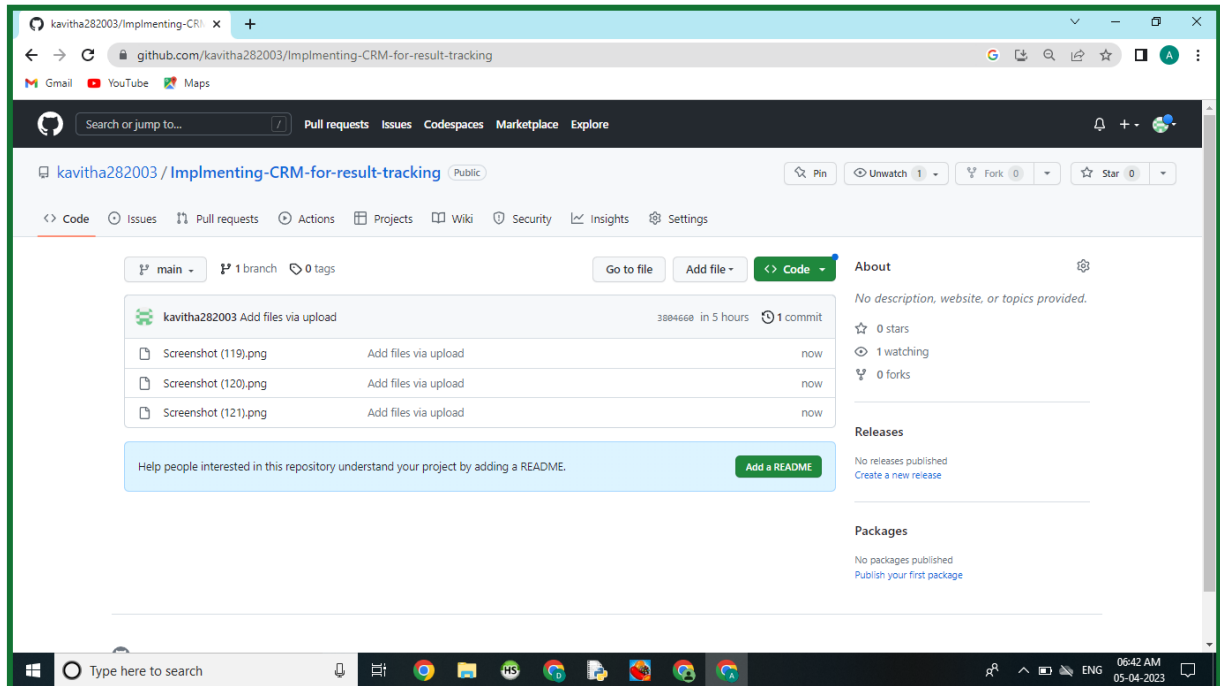
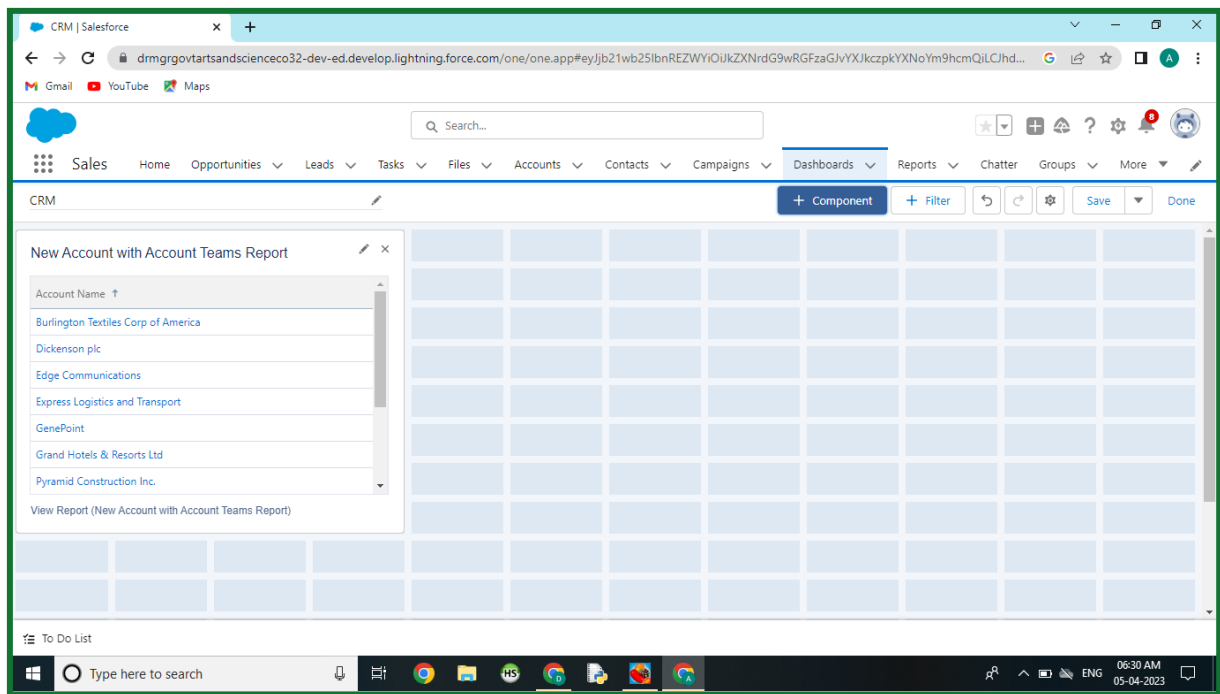
- Burlington Textiles Corp of America
- Dickenson plc
- Edge Communications
- Express Logistics and Transport
- GenePoint
- Grand Hotels & Resorts Ltd
- Pyramid Construction Inc.

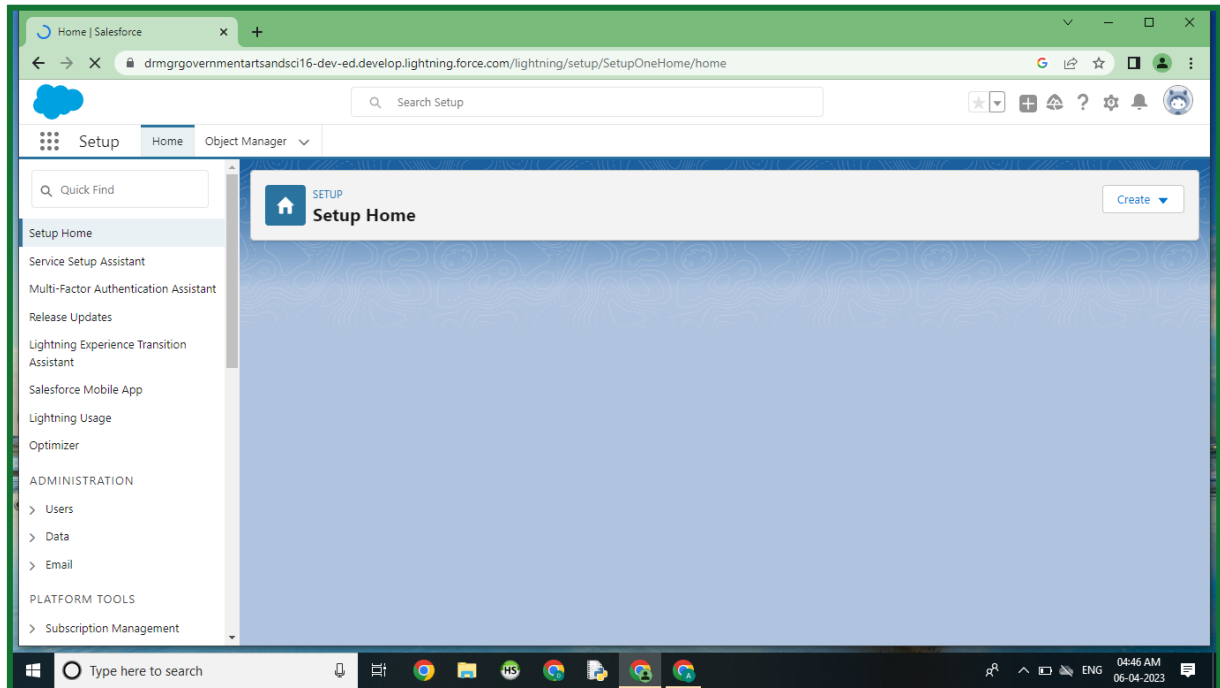
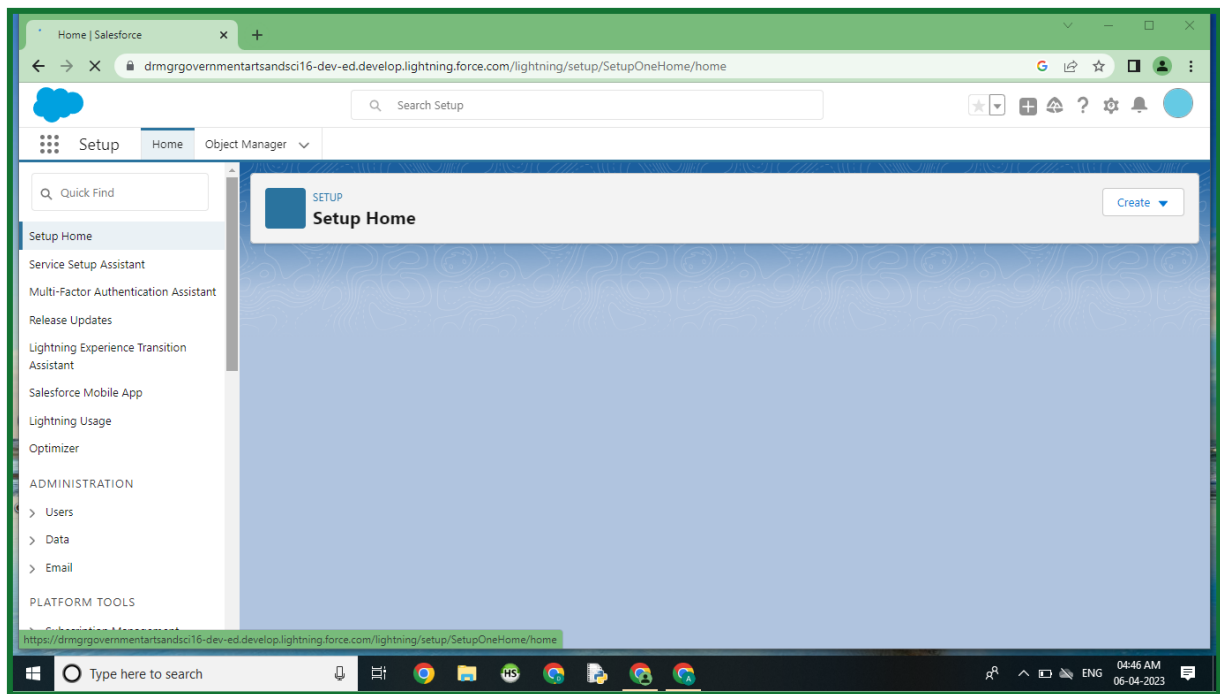
View Report (New Account with Account Teams Report)

To Do List

Type here to search

06:23 AM 05-04-2023





TRAILHEAD PROFILE PUBLIC URL:

Team leader -trailblazer.me/id/kavia34.

Team member1-trailblazer.me/id/dilgam9042.

Team member2-trailblazer.me/id/karam117.

Team member3-trailblazer.me/id/jeev14.

ADVANTAGES:

Develop and maintaining new digital channels.
Attract new prospects.
Namely visitors to your site.
Retain customers and establish a long term relationship of trust.

DISADVANTAGES:

- **software subscription or purchase fees.**
- **premium upgrades, eg add-on marketing or reporting features.**
- **customisation.**
- **IT resources needed.**
- **hardware or software requirements.**
- **staff training and upskilling.**

APPLICATION:

- **Deployment. Not surprisingly, the first step in CRM success is making sure it is properly deployed. ...**
- **Setting Objectives/Expectations. ...**
- **Qualifying Leads. ...**
- **Data Management**

CONCLUSION:

Including all necessary skills, and include a list of desired skills that are not necessary but that would enhances candidate”s chances if we fail to do

this,we might end with a low quality pool of candidate and wind limited choices to fill the open position.

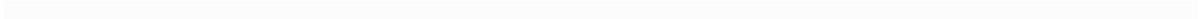
FUTURE SCOPE:

[The future of CRM] is about which companies will be able to pivot to meet the changing needs and trends — driven by customer expectations. Customers expect organizations to know a lot about them and expect to have conversations. Companies like Tact.ai and Nimble on the sales side are solid example

The scope of CRM includes a wide range of activities, from managing customer contact information to developing personalized marketing campaigns. In order to be effective, CRM must be tailored to the specific needs of each business. As such, the scope of CRM can vary greatly from one company to the next

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Brainstorm

Ⓢ 10 minutes

improve phone service	better identify sources of returning customers	secure customers' identity
increase in customers satisfaction	researcher goals and previous better requires fit marketing needs	improve effectiveness of sales call tactics
more effective service for long customers	increase the number clients	optimize marketing

improve the decision making process	use the available data	watch the trends
boost your efficiency	maximize up-selling	

boost sales as fast as that	plan and control your sales path	improve productivity
promote teamwork	manage your sales team	plan your meetings and training events

attaching a clear property to improve a project	developing a project to the purpose	Aim it to be fully clear and success
develop our knowledge to improve a project	take more activities and achieving a process	fill to be the try our best to improve

