GOVERNMENT ARTS COLLEGE FOR WOMEN
SALEM-8

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IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS

1) INTRODUCTION

1) OVERVIEW

⇔ *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 initialized by Candidate for all Internal Results.*

⇔ *Now only dean can update the marks after re-evaluation.*

2) PURPOSE

⇔ *Implementing A CRM system is a value-adding process that can bring great benefits to any business.*

⇔ *The ultimate goal is to improve communications and interaction with real customers and leads, and to maximize their impact on the production process and business figures.*

3) OBJECTIVE

⇔ *The overall business goals of CRM systems are to help organizations.*

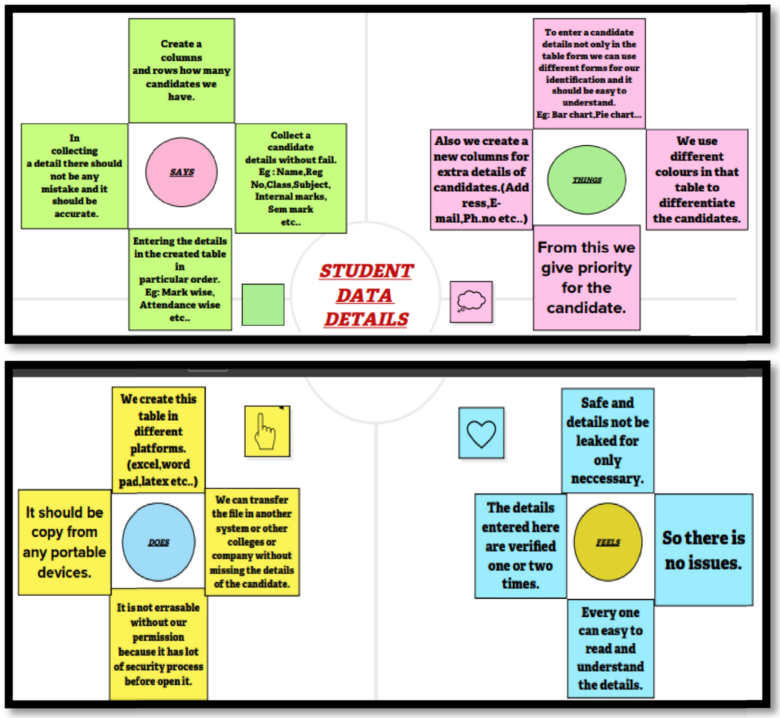
1) *Capture new leads and move them through the sales process.*

2) *Support and manage relationships with current cutomers to maximize their lifetime value to the company.*

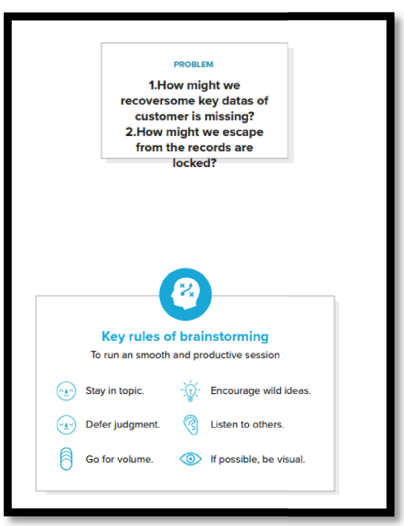
3) *Boost productivity and lower the overall costs of marketing, sales, etc….*

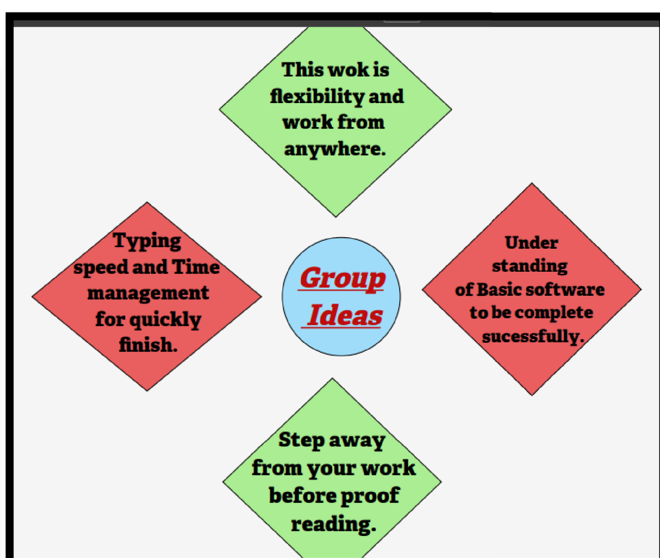
2) PROBLEM DEFINITION & DESIGN THINKING

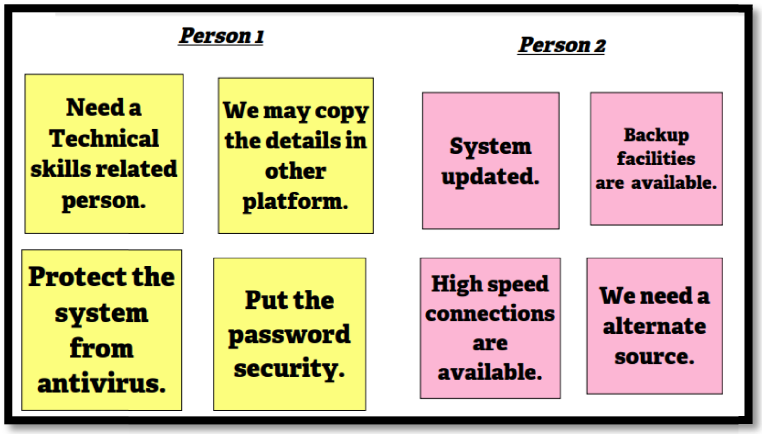
1) EMPATHY MAP



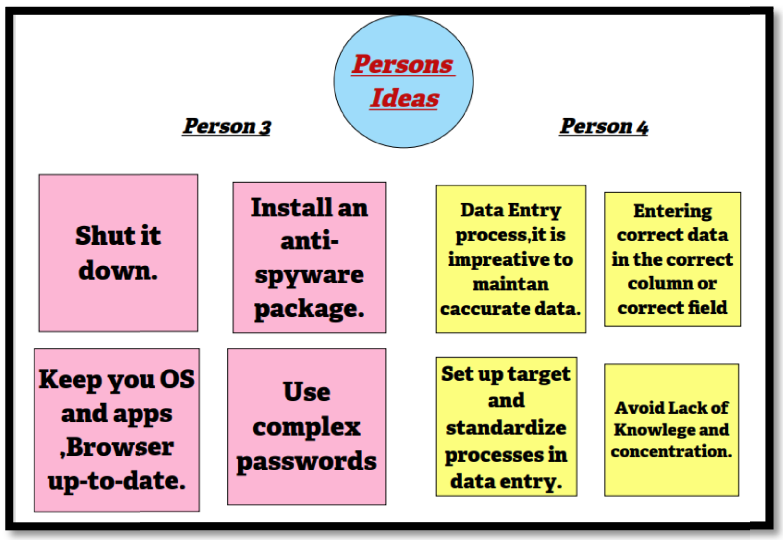
2) Brainstorming







Person 1
Person 2
Need a Technical skills related person.
We may copy the details in other platform.
System updated.
Backup facilities are available.
Protect the system from antivirus.
Put the password security.
High speed connections are available.
We need a alternate source.



Persons Ideas
Person 3
Person 4
Shut it down.
Install an anti-spyware package.
Data Entry process,it is impreative to maintan caccurate data.
Entering correct data in the correct column or correct field
Keep you OS and apps ,Browser up-to-date.
Use complex passwords
Set up target and standardize processes in data entry.
Avoid Lack of Knowlege and concentration.

Keep you OS and apps ,Browser up-to-date.
Need a Technical skills related person.
Set up target and standardize processes in data entry.
Importance
If each of these tasks could get done without any difficulty or cost, which would have the most positive impact?
Understanding of Basic software to be complete sucessfully.
System updated.

3) RESULT:

3.1 DATA MODEL

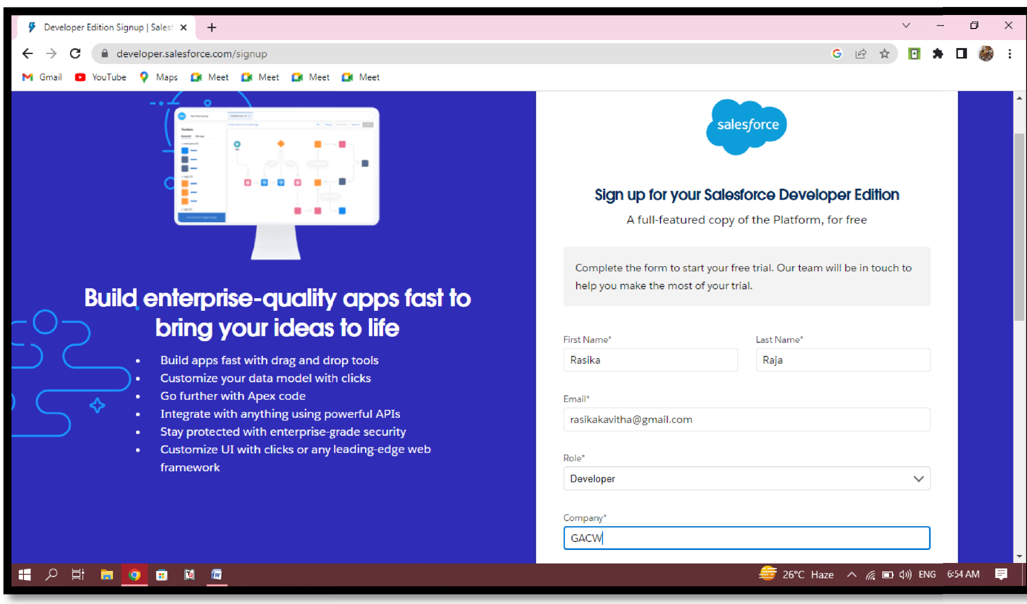
1) Objects and Fields and Relationship

<table>
<tr><th>OBJECTS</th><th>FIELDS IN THE OBJECTS</th></tr>
<tr><td>Semester</td><td><table><tr><th>Field label</th><th>Data type</th></tr><tr><td>Semester Name</td><td>Text</td></tr><tr><td>Course detail</td><td>Lookup</td></tr></table></td></tr>
<tr><td>Candidate</td><td><table><tr><th>Field label</th><th>Data type</th></tr><tr><td>Candidate Name</td><td>Text</td></tr><tr><td>Candidate Id</td><td>Text</td></tr><tr><td>Semester Name</td><td>Text</td></tr><tr><td>Internal results</td><td>Lookup</td></tr></table></td></tr>
<tr><td>Course Detail</td><td><table><tr><th>Field label</th><th>Data type</th></tr><tr><td>Course Name</td><td>Text</td></tr><tr><td>Course ID</td><td>Text</td></tr></table></td></tr>
<tr><td>Lecturer Detail</td><td><table><tr><th>Field label</th><th>Data type</th></tr><tr><td>Lecturer Role</td><td>Text</td></tr><tr><td>Lecturer Name</td><td>Text</td></tr><tr><td>Course ID</td><td>Text</td></tr><tr><td>Course detail</td><td>Lookup</td></tr></table></td></tr>
<tr><td>Internal Results</td><td><table><tr><th>Field label</th><th>Data type</th></tr><tr><td>Candidate ID</td><td>Text</td></tr><tr><td>Course ID</td><td>Text</td></tr><tr><td>Marks</td><td>Text</td></tr></table></td></tr>
</table>

3.2 ACTIVITY & SCREENSHOT

3.2.1 MILESTONE-1

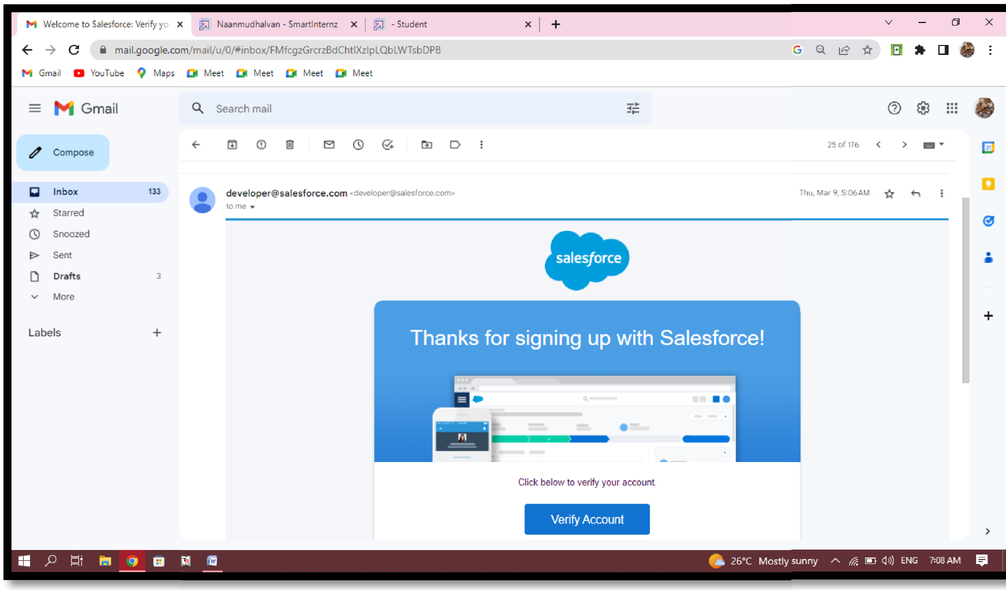
a) Creating a developer org in salesforce:



To create a account in salesforce we go to the chrome and type the link https://developer.salesforce.com.

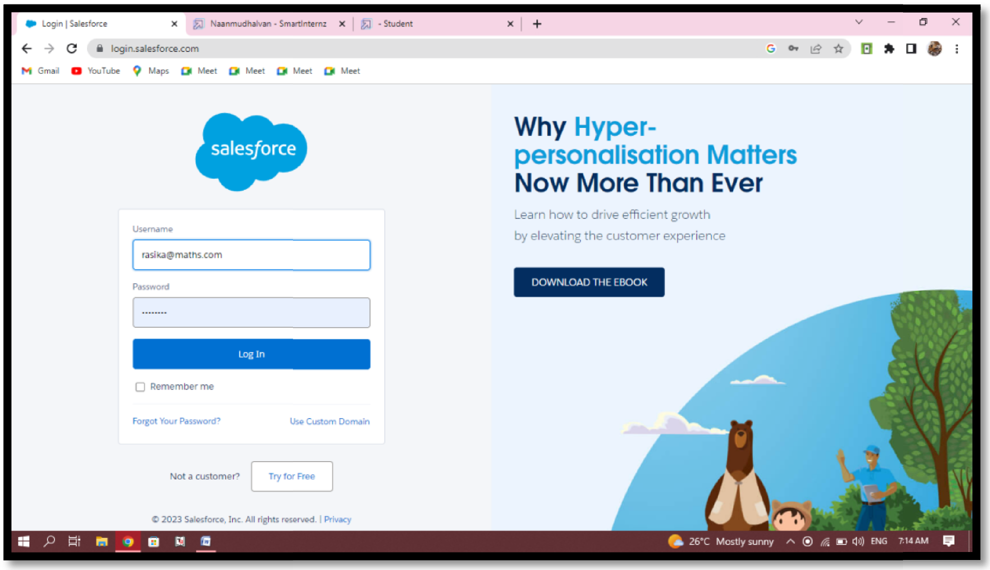
- Enter the details asked in that salesforce page.
- Username should be a combination of your name and company eg: username@organization.com.
- Click on sign up.

b) Account Activation:

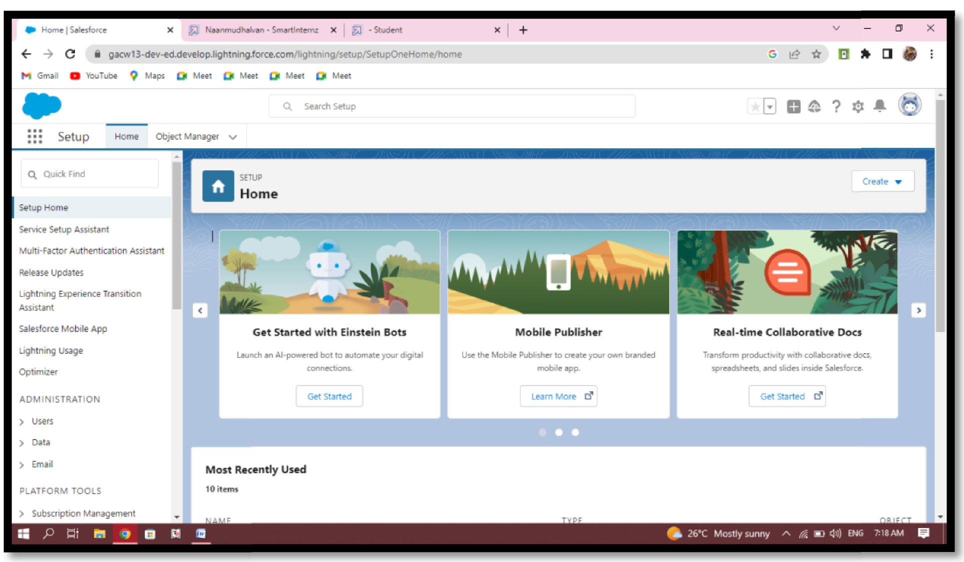


- ➢ While you sign up in salesforce page you will get a mail in inbox of our email.
- ➢ Then verify your account.
- ➢ The account will be activated.

c) Login to the Salesforce Account:



- After verify your account go to the login page.
- Enter your username and and Password.
- Click Log in.
- Finally you entered in salesforce page.



- The above page will be displayed when you create a account in salesforce.
- After this process we start to do the project.

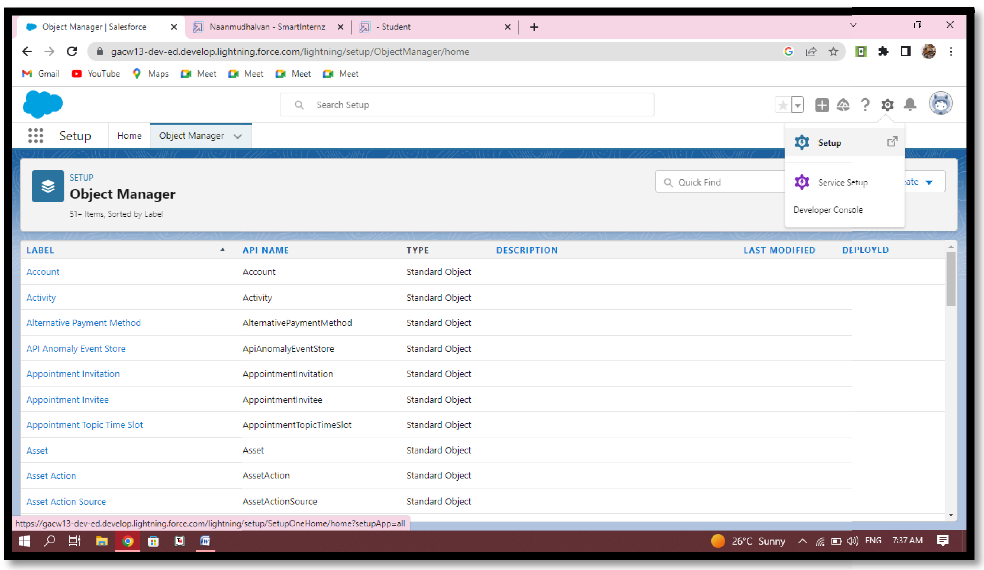
3.2.2 MILESTONE-2

OBJECTS:

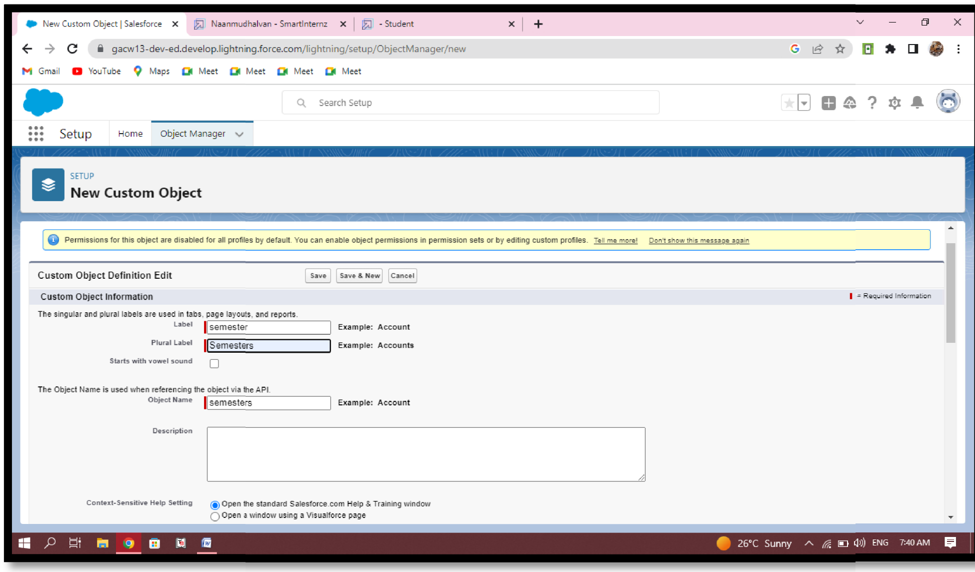
Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

a)To create a custom object:

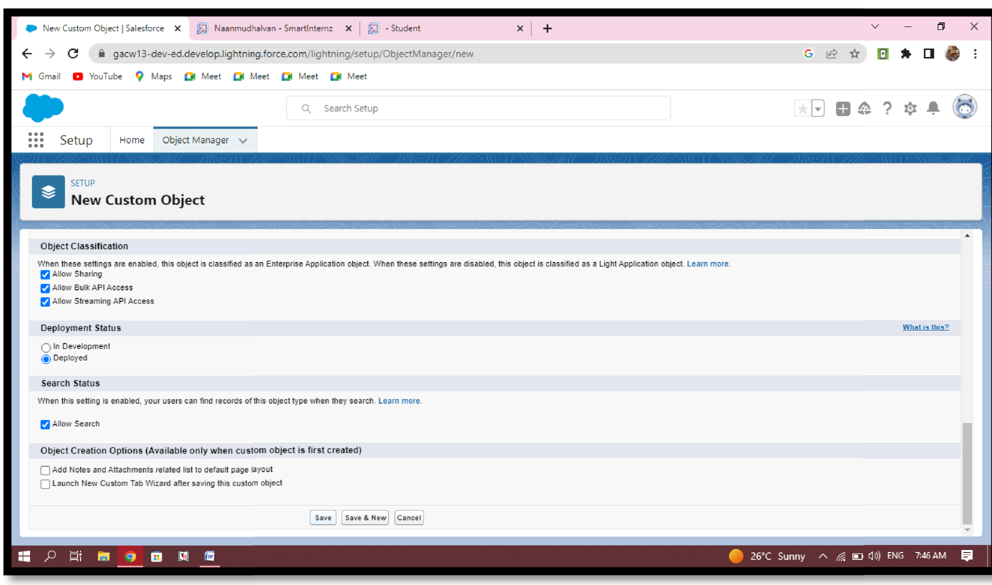
- Create an five custom object for Candidate Internal Result Card.
- Semester, Candidate, Course Detail, Lecturer details, Internal Results.



- Go to gear icon and then click Setup.
- Click on the Object Manager.
- In create option click Custom Object.

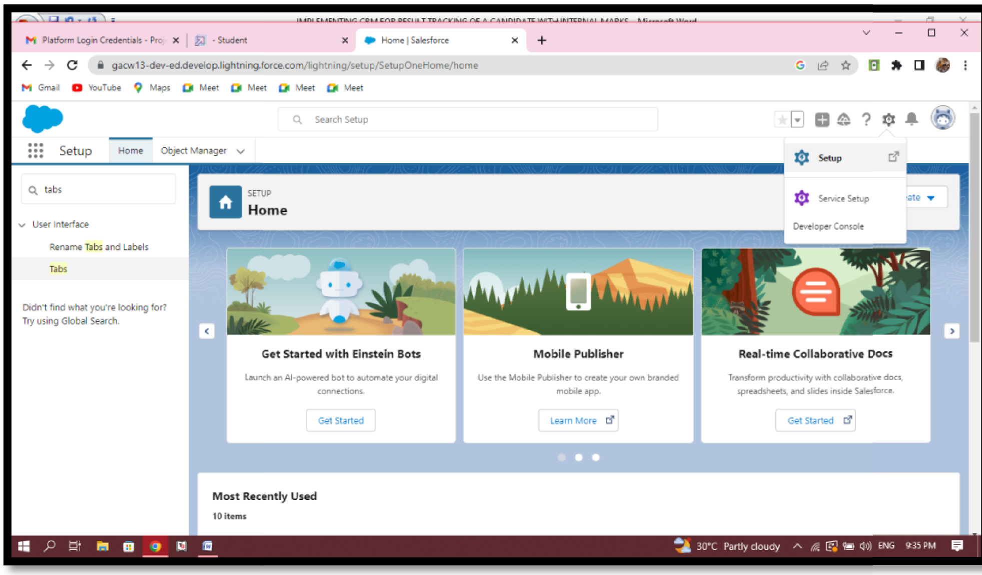


- ➢ Label: Semester
- ➢ Plural Label: Semesters
- ➢ Record Name: Semester Name

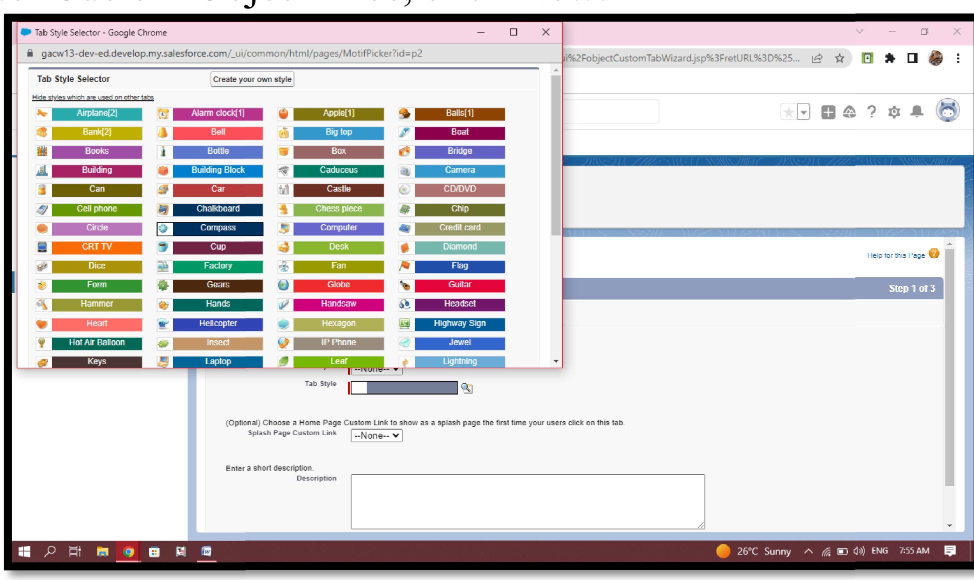


- ➢ Check the Allow Reports checkbox
- ➢ Check the Allow Search checkbox
- ➢ Click Save.
- ➢ **Follow Similar steps to create Candidate, Course Details, Lecturer Details, Internal results Objects**.

b) Now create a custom object tab for a created objects

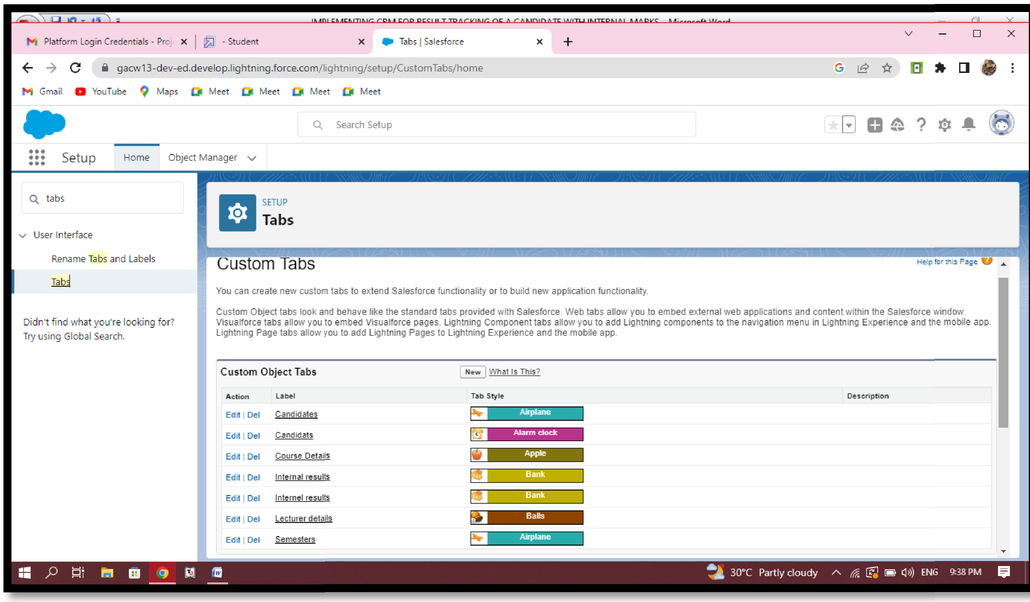


- Go the gear icon then click the setup.
- In the quick find enter Tabs
- Enter Tabs shown below the Quick find.
- Under Custom Object Tabs, click New.



- For Object, select Semester.
- For Tab Style, select any icon.
- Leave all defaults as is.

➢ Click Next → Next →Save.



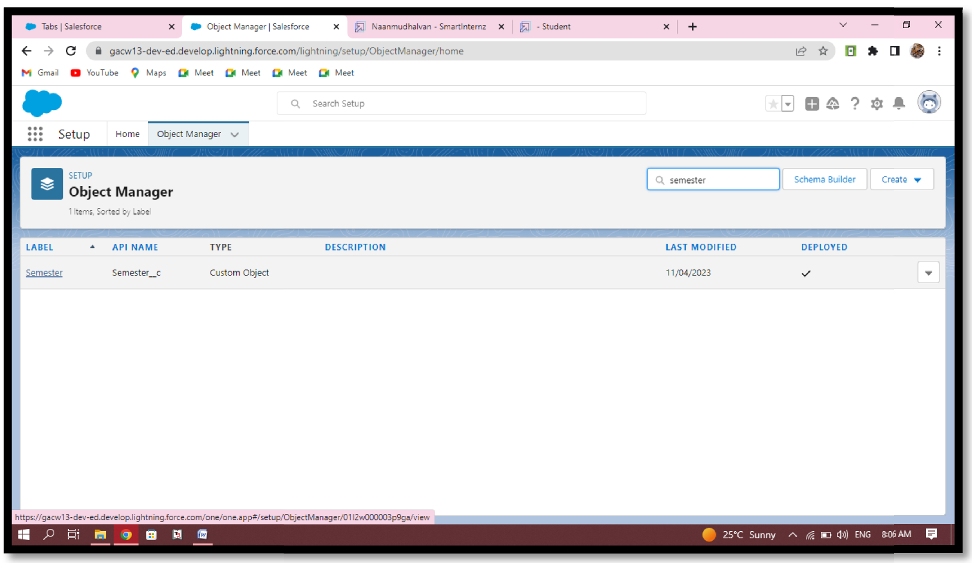
➢ **Follow Similar steps to create tab for Candidate, Course Details, Lecturer Details, Internal results Objects**.

3.2.3 MILESTONE-3

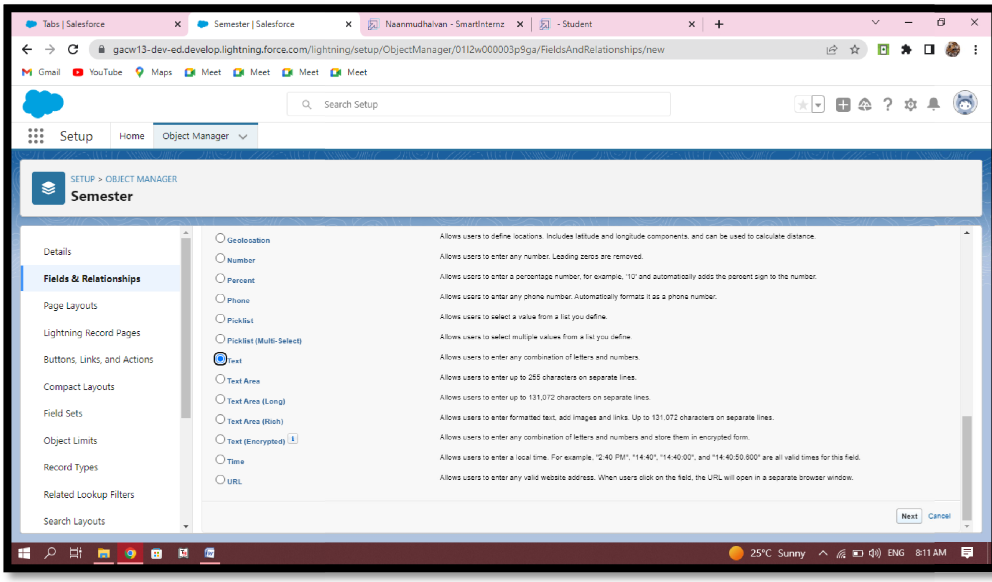
FILEDS AND RELATIONSHIP:

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.

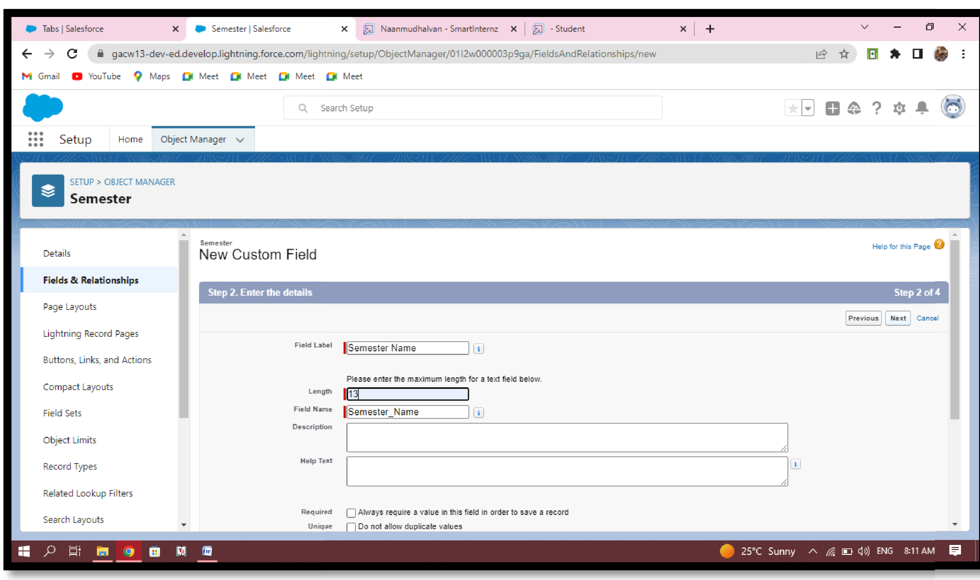
Creation of field:



- Go the gear icon the click setup.
- In the Object Manger enter the object name as Semester in quick find.
- Then select semester.
- Click the Fileds and Relationship.



- Select the Text as the Data Type
- Then click Next.



- For Field Label, Enter Semester Name.
- Click Next → Next → Save

Follow Similar steps to create Field and Relationship for Candidate, Course Details, Lecturer Details, Internal results Objects

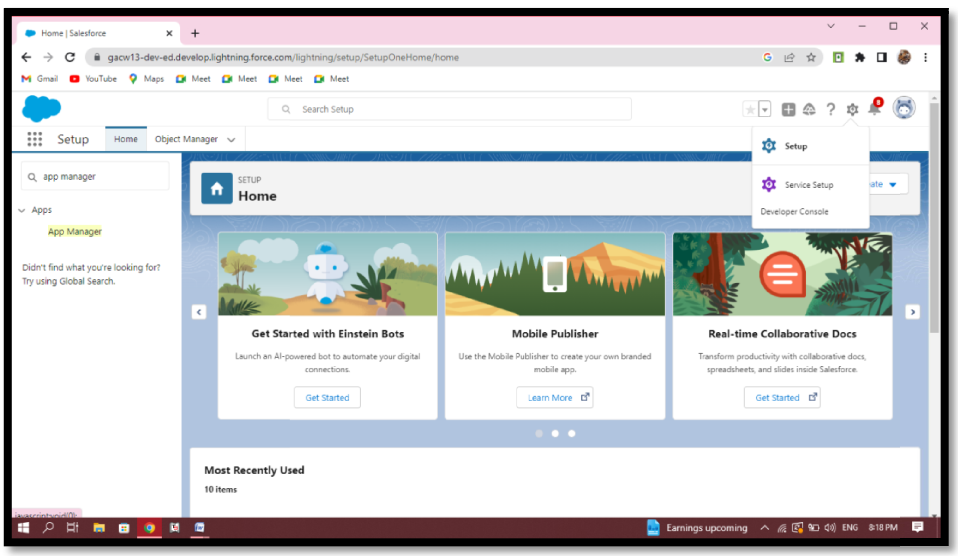
Semester	Candidate	Course Details	Lecturer Details	Internal results
Semester Name	Candidate Name	Course name	Lecturer Role	Candidate ID
Course (lookup)	Candidate ID	Course ID	Lecturer Name	Course ID
	Semester Nmae		Course ID	Marks
	Internal results(lookup)		Course(lookup)	

3.2.4 MILESTONE-4

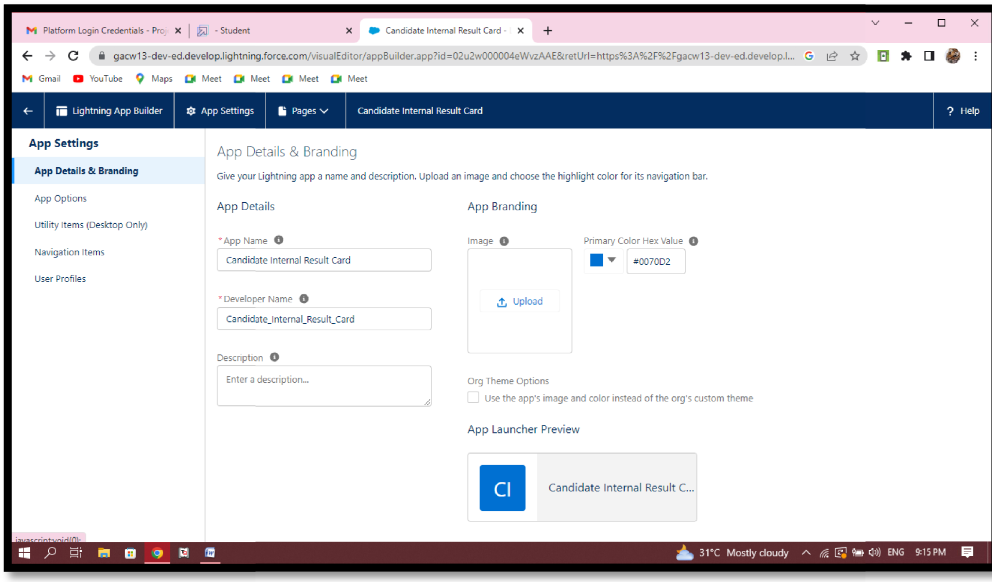
Lightning App

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.

Create the Candidate Result Card app:



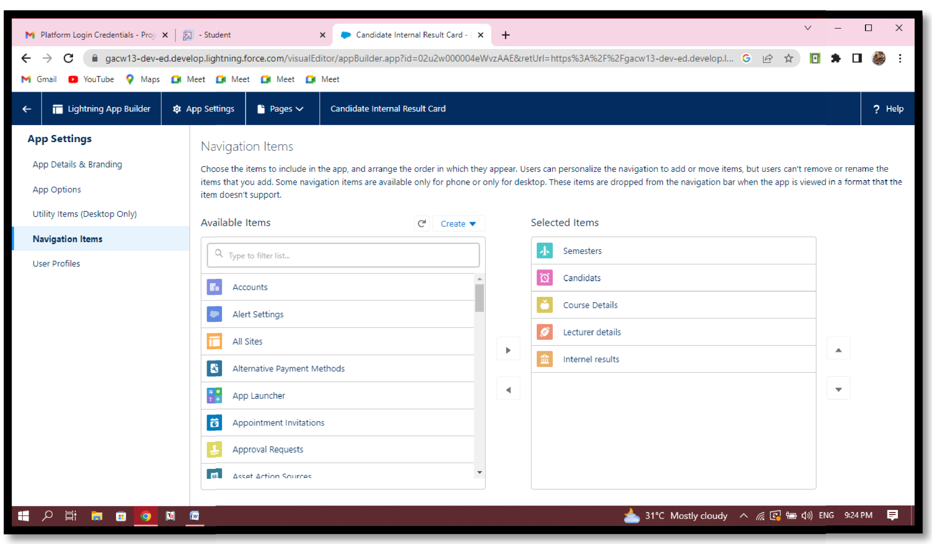
- Gear Icon → Setup → Enter App Manager in the Quick Find
- Select App Manager.



➢ Click New Lightning App → Enter Candidate Internal Result Card as the App Name → Click Next

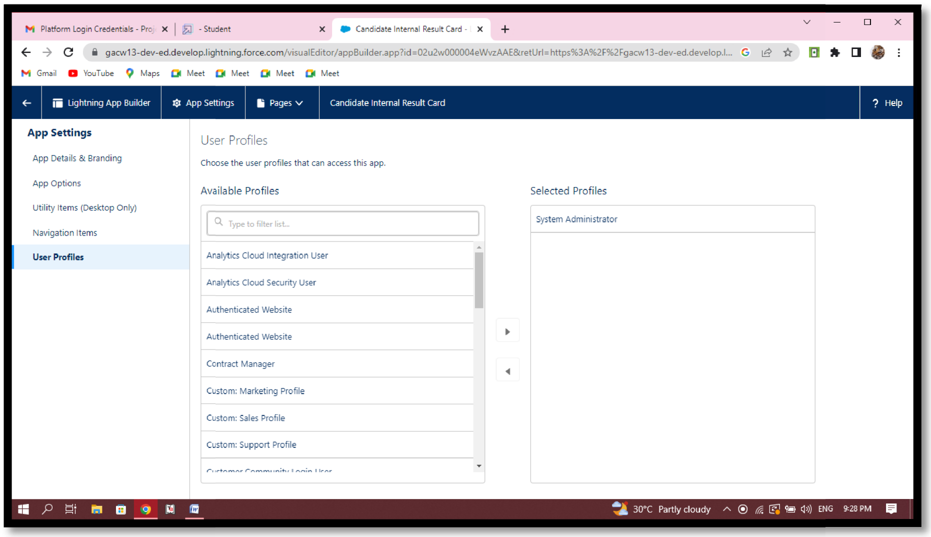
➢ Under App Options, leave the default selections and click Next.

➢ Under Utility Items, leave as is → click Next.



➢ From Available Items, select Semester, Candidate, Course Details, Lecturer Details, Internal Results and move them to Selected Items.

➢ Click Next.



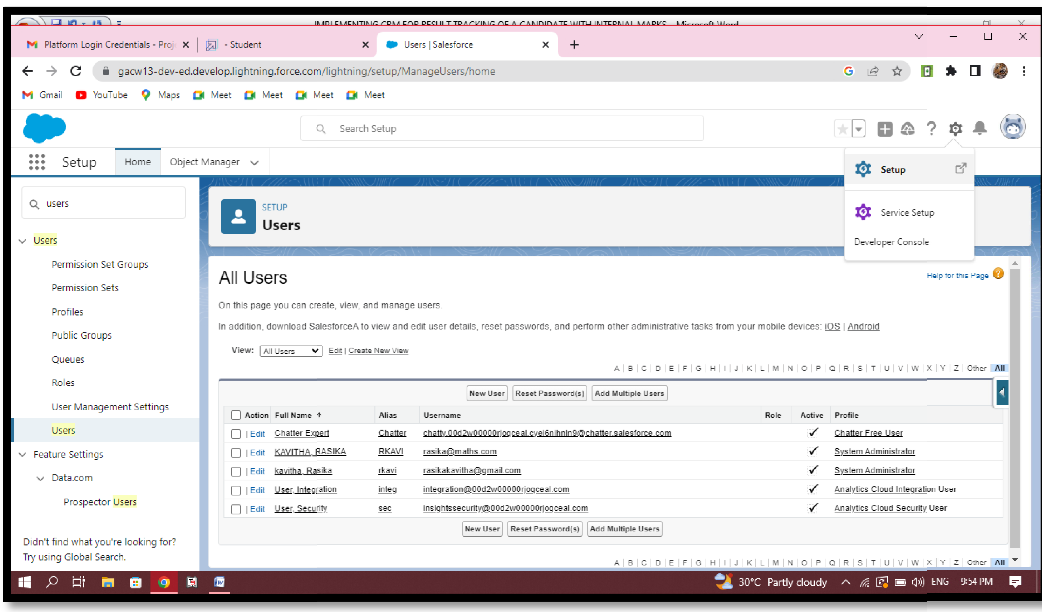
- From Available Profiles, select System Administrator and move it to Selected Profiles.
- Click Save & Finish.

3.2.5 Milestone-5

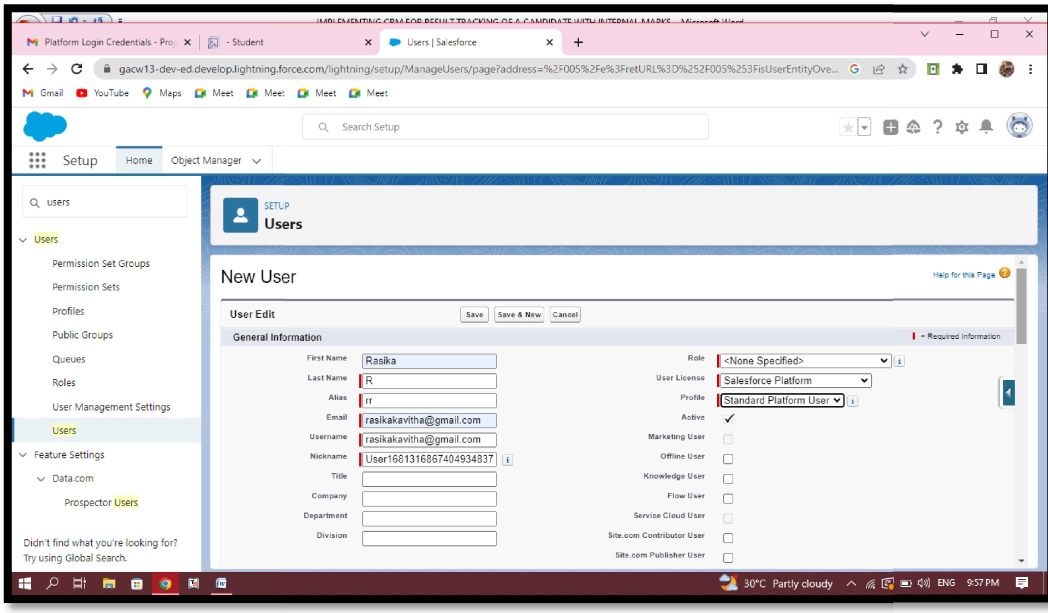
Users

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.

Creating a Users:

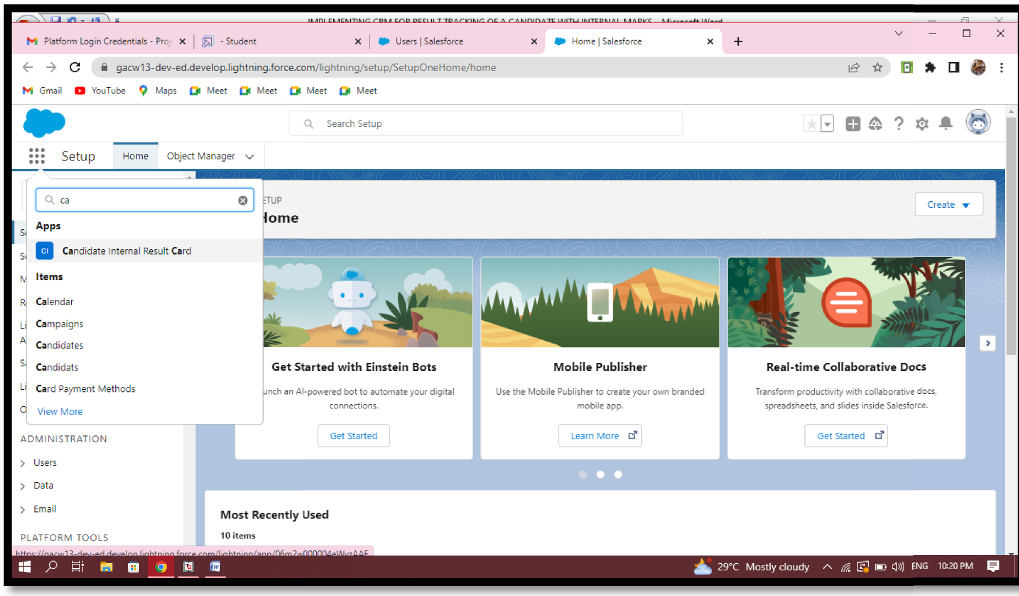


- ➢ Gear Icon →Setup → Quick Find box → Enter Users
- ➢ Select Users.
- ➢ Click New User.

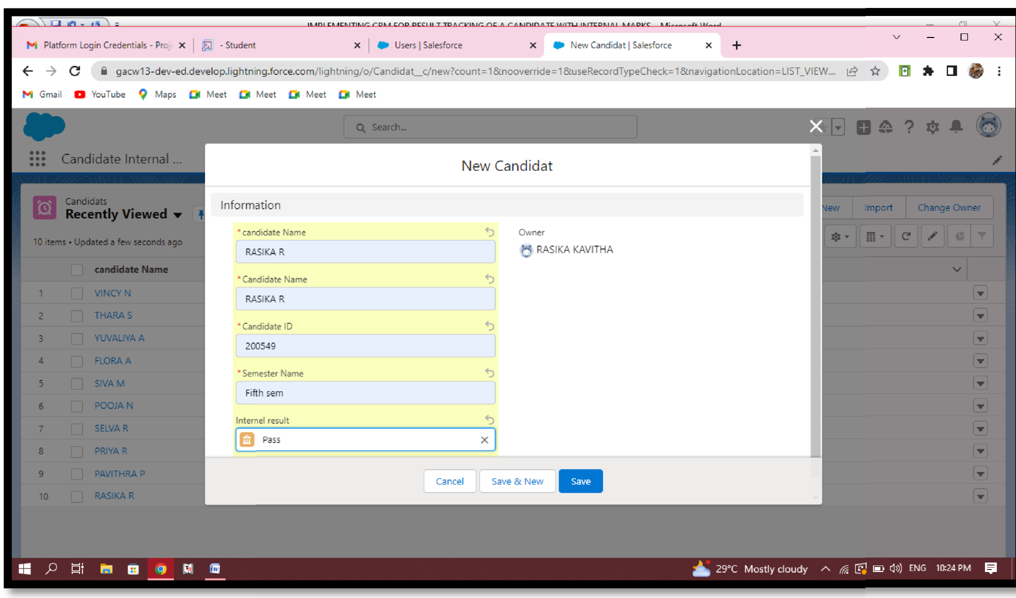


- Enter the user's name
- Your email address and a same username in the form of an email address.
- By default, the username is the same as the email address.
- Select a Role-none
- Select a User Licence As salesforce.
- Select a profile as Salesforce User.

To create a record for a object to give the report:



➢ Go to App Launcher → Enter Candidate Internal Result Card



➢ Select Candidate Object tab → Click New → Enter the details of the fields ask in Candidate.

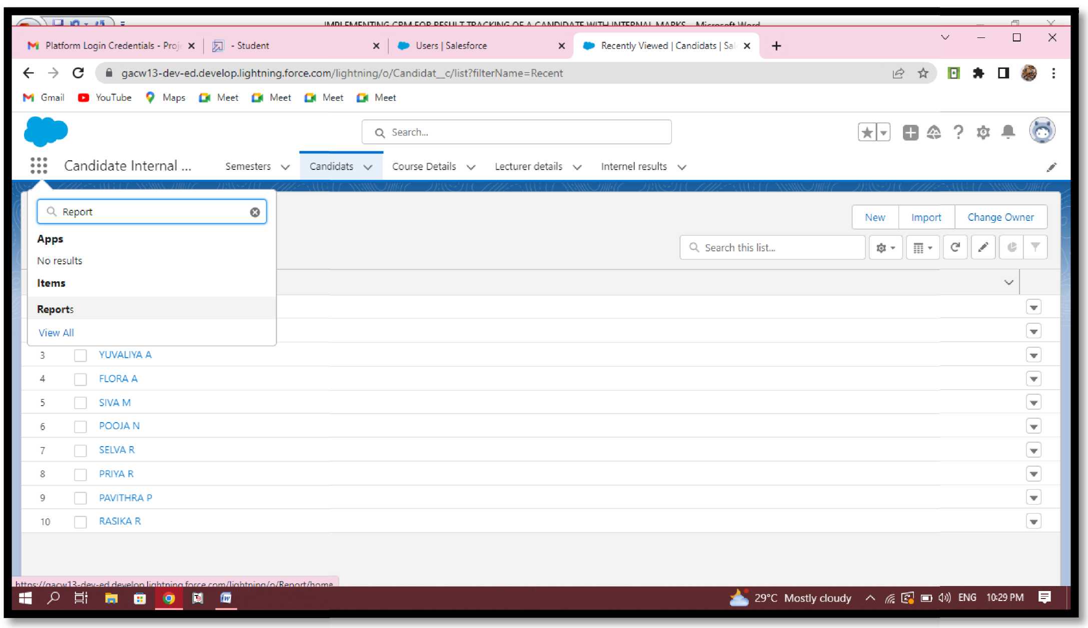
➢ After the records are given → Click Save.

3.2.6 MILESTONE-6

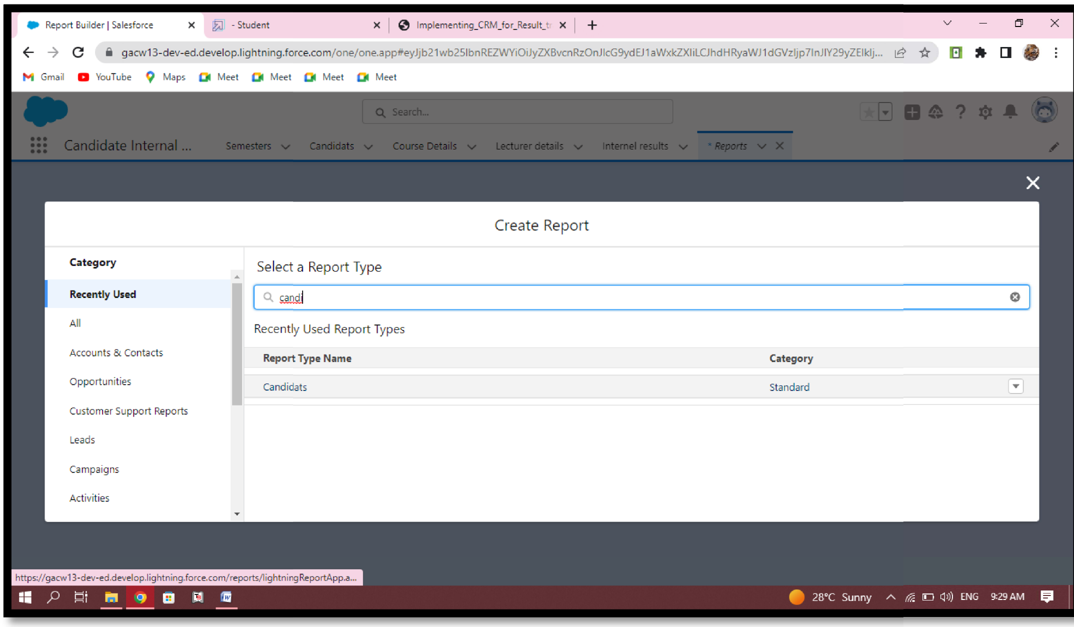
REPORTS

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.

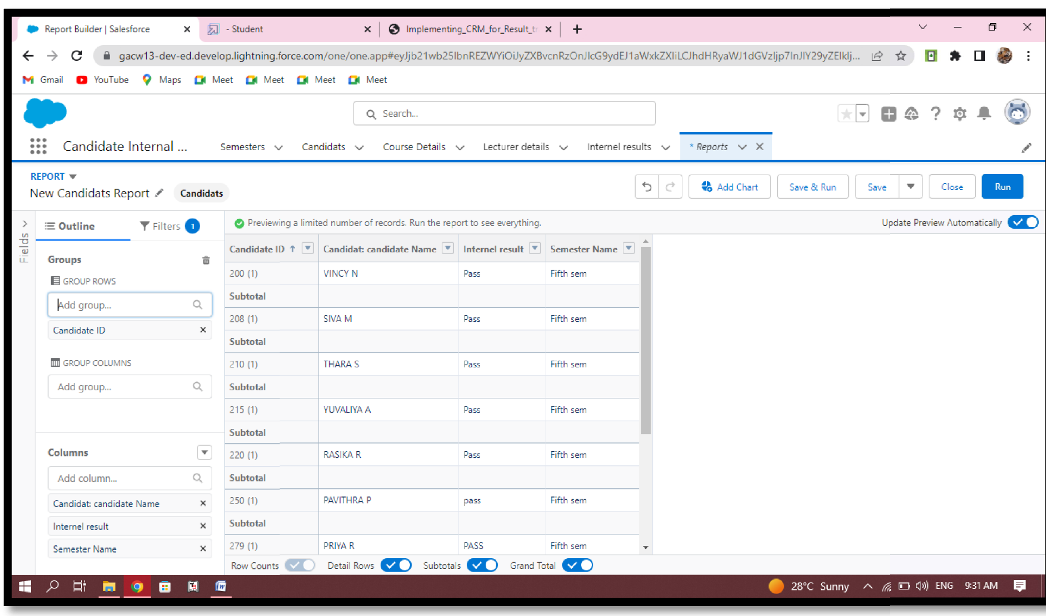
To create a report:



- ➢ App Launcher → Click on the reports tab
- ➢ Click New Report.



- ➢ Select report type from category.
- ➢ Click on start report.



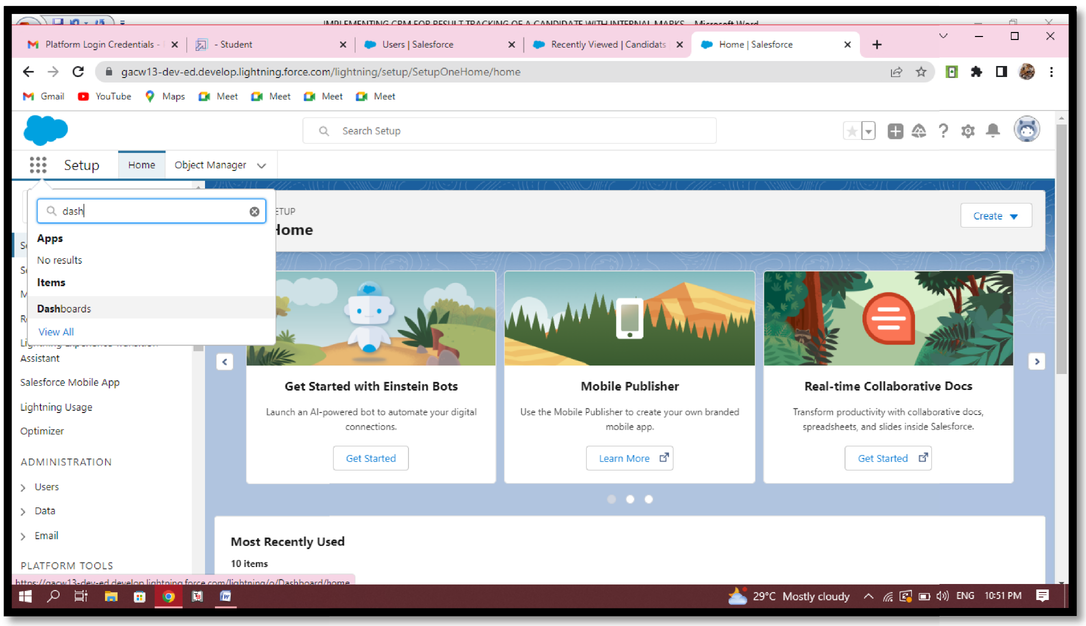
- ➢ Customize your report.
- ➢ Then save.

3.2.7 MILESTONE-7

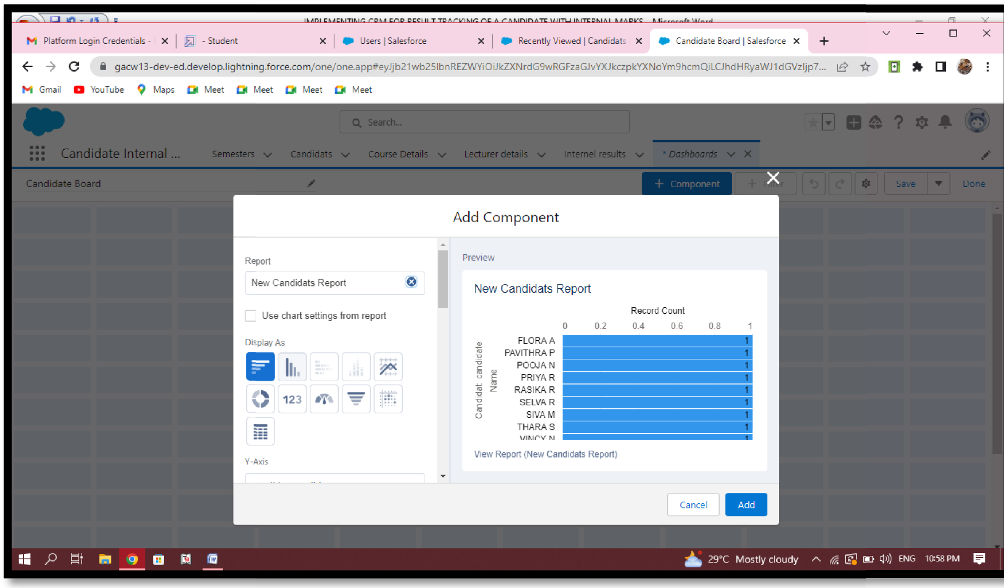
DASHBOARDS

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

Create a Dashboard:

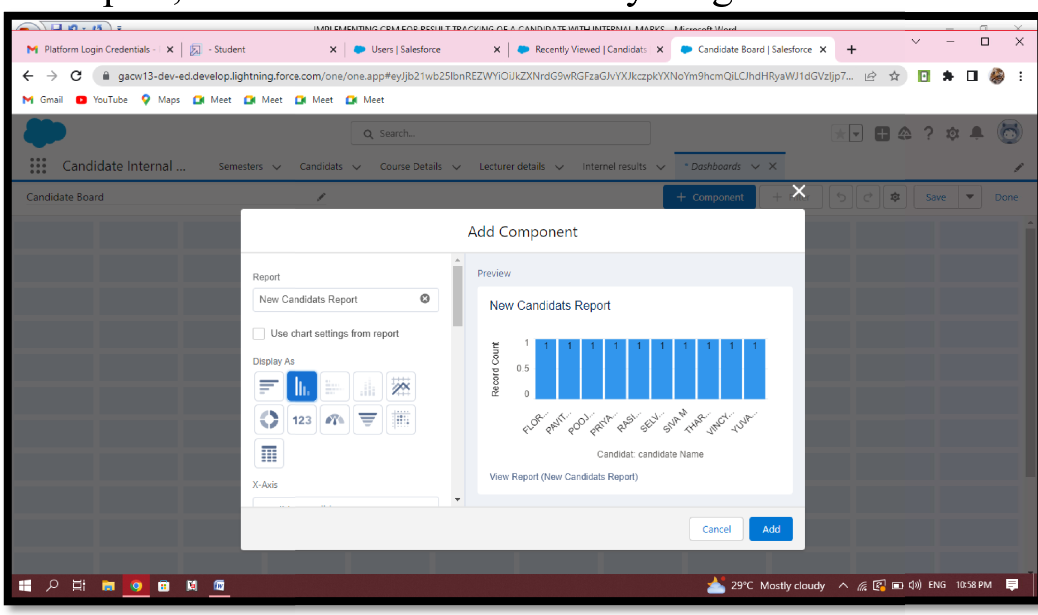


- ➢ Click the Dashboards tab.
- ➢ Click New Dashboard.
- ➢ Name your dashboard Candidate Board .
- ➢ Leave all other fields as is → Click Create.
- ➢ Click + Component

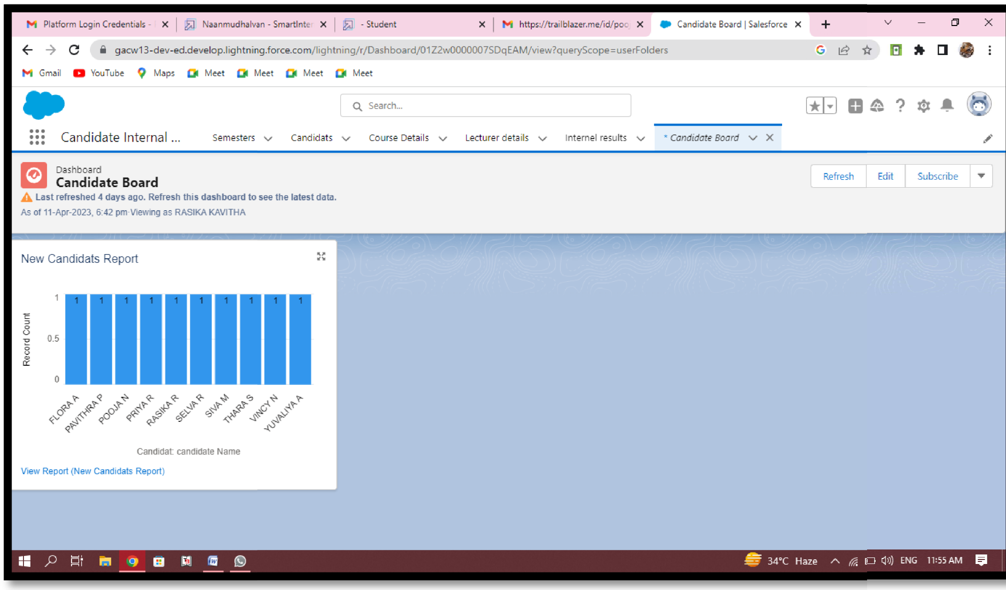


➢ Select the report we create it as New Candidate Board.

➢ For Report, select Candidate Marks by Stage. Click Select.



➢ For Display As, select Vertical Bar Chart → Click Add.



➢ Click Save → Click Done.

4)TRAILHEAD PROFILE PUBLIC URL

Team Lead :

- RASIKA.R - **https://trailblazer.me/id/dge356**

Team Member 1 :

- PRIYADHARSINI.S -**https://trailblazer.me/id/psakthivel13**

Team Member 2 :

- POOJA.R - **https://trailblazer.me/id/poojr21**

Team Member 3 :

- NANDHINI.M - **https://trailblazer.me/id/nnandhini18**

5) ADVANTAGES AND DISADVANTAGES

1) ADVANTAGES

- ⇔ *It can speed up sales conversion process.*
- ⇔ *It increase staff productivity, lowers time costs and boosts morale.*
- ⇔ *It enables widely dispersed teams to word closely.*
- ⇔ *Can improve customer loyality through exceptional experience.*
- ⇔ ***This article is for small business owners and marketers who want to learn about the benefits of CRM software for small businesses.***

2) DISADVANTAGES

- ⇔ *Staff over – reliance on CRM may diminish customer loyality through a bad experience.*
- ⇔ *Security concerns associated with contralised data.*
- ⇔ *The excess initial time and productivity cost of implementation.*
- ⇔ *It requires a process driven sales organization.*
- ⇔ *It may not suit for every business.*

6) APPLICATIONS

- ⇔ *A good CRM helps you understand your market and the needs of your customers.*
- ⇔ *A CRM saves important data in extensive customer and contact lists.*
- ⇔ *A good CRM helps you maintain great customers relationship with all your clients and let them know what your products and services can do for them.*
- ⇔ *A can helps you streamline your internal sales processes so that there is consistency and quality across your sales team.*
- ⇔ *A customers relationship management tool with help you understand your current capacity and the demand customers are likely to have for your products and services.*

7) CONCLUSION

- ⇔ *Customer Relationship Management(CRM) is a technology of managing all you company's relationship and interactions with Customers and potential customers.*
- ⇔ *The goal is simple improve business relationship a CRM system helps companies stay connected to customers. Stream lies processes and improve profitability.*

8) FUTURE SCOPE

- ⇔ *The future of CRM is about which companies will be able to pivot tio meet the changing needs and trends-driven by customer expectations.*
- ⇔ *The scope of CRM includes a wide range of acivities from managing customers contact information to developing personalized marketing campaigns.*

THANK YOU.