

# **IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS**

PROJECT BASED EXPERIENTIAL LEARNING PROGRAM

**IMPLEMENTING CRM FOR RESULT  
TRACKING OF A CANDIDATE WITH  
INTERNAL MARKS USING SALESFORCE**

Submitted by

**R.Gowsalya (20321ER037)  
M.Iavarasi (20321ER038)  
R.Jeyalakshmi (20321ER039)  
V.Jothika (20321ER040)**

**TEAM ID:NM2023TMID19312**

Under the guidance of  
**Mrs.G. Vijayalakshmi, Msc., M.Phil.,**

**GUEST LECTURER**

**PG AND RESEARCH DEPARTMENT OF MATHEMATICS**

**M.V.MUTHIAH GOVERNMENT ARTS COLLEGE FOR WOMEN**

**DINDIGUL-624001.**

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# IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS

## 1 INTRODUCTION:

### 1. OVERVIEW

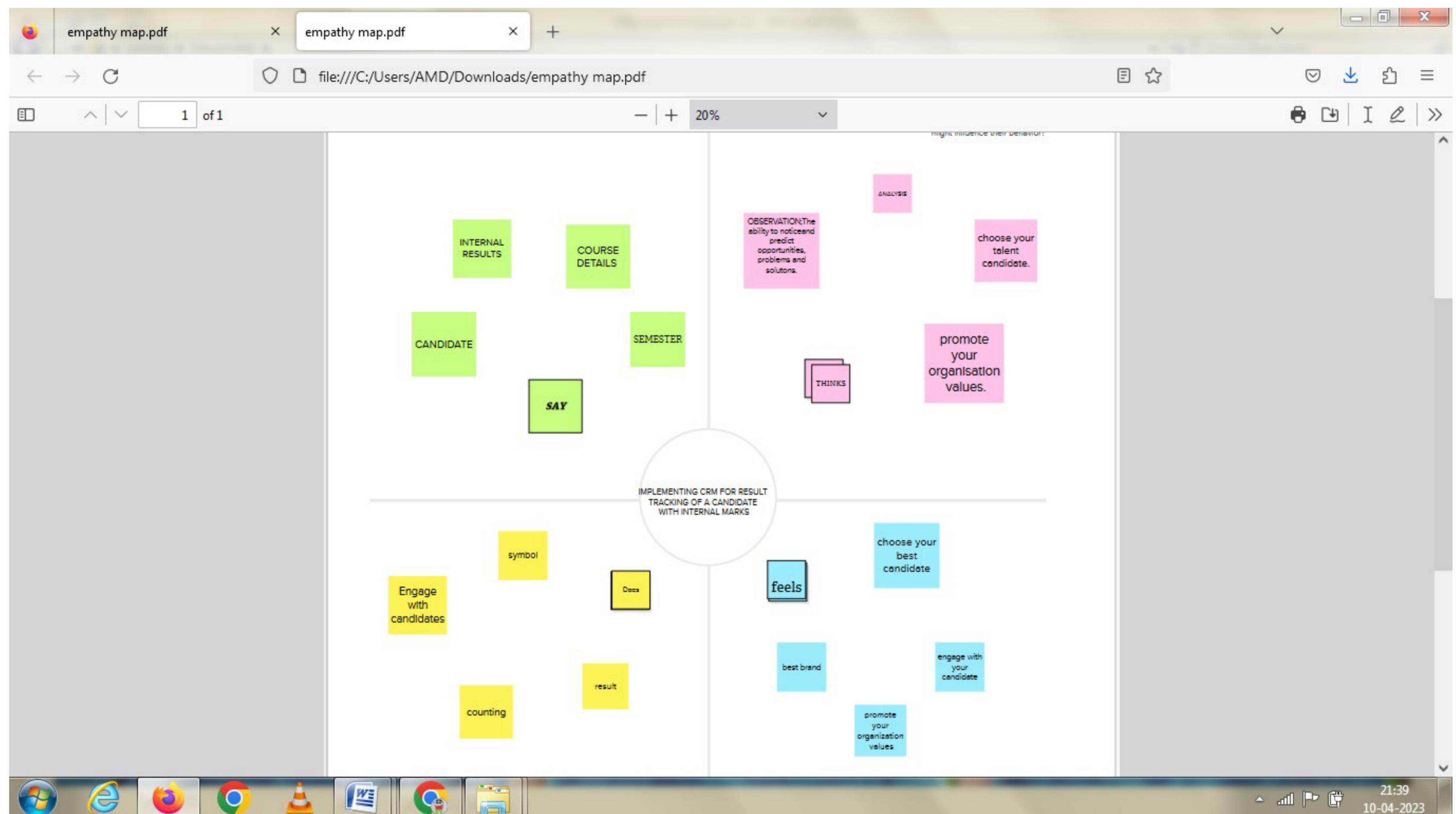
Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you. Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

### 2. PURPOSE:

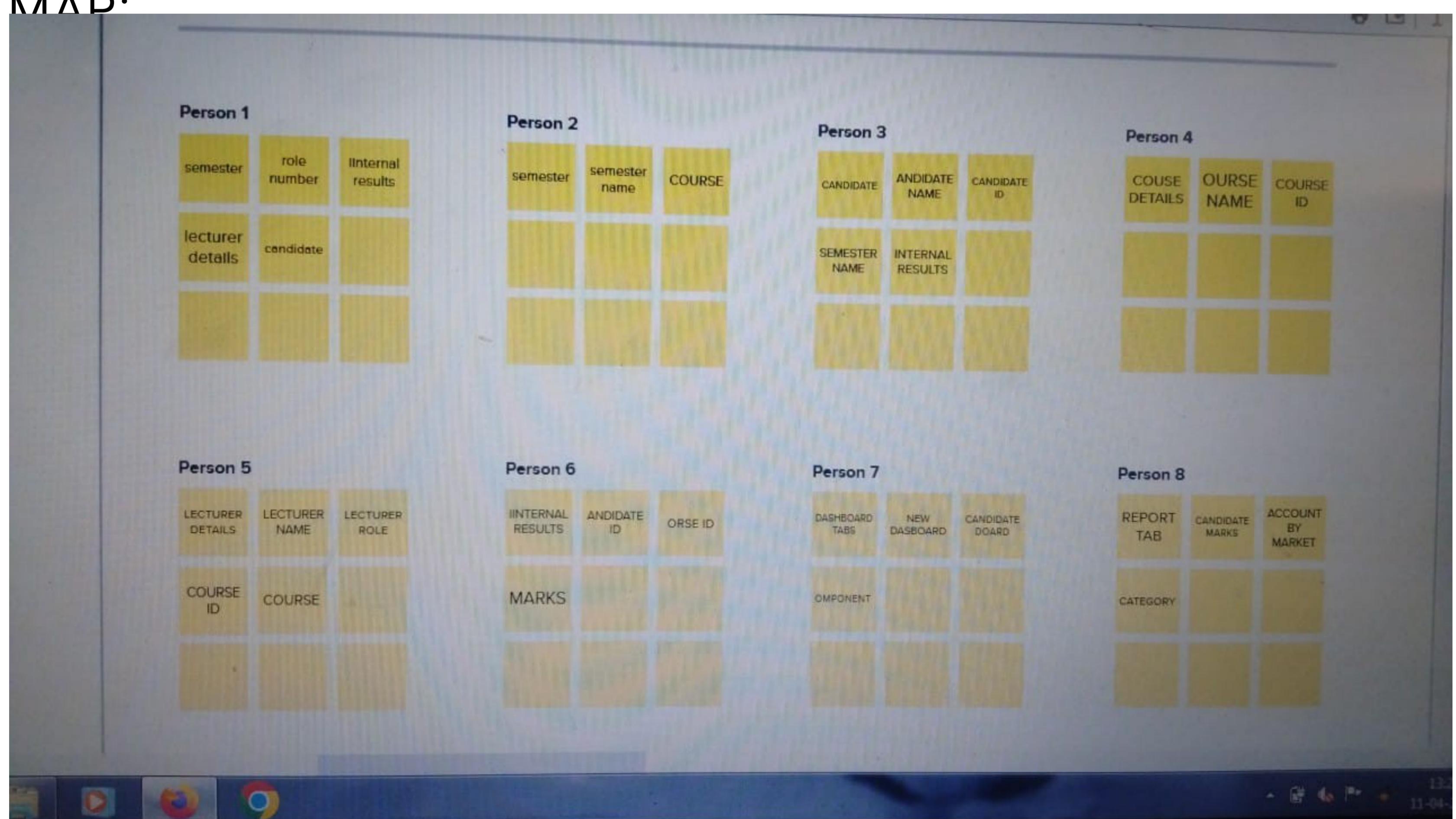
Administrator should be able to create all base data including Semester, Candidate, Course and Lecturer ,Lecturer should have the ability to create Internal Results,Dean, who is one of the Lecturer, should be the only one with ability to update Internal Results,Re-evaluation Can be initialised by Candidate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

## 2. PROBLEM DEFINITION & DESIGN THINKING:

## 2.1 EMPATHY MAP:



## 2.2 IDEATION & BRAINSTORMING MAP:



### 3. RESULT:

#### 1. DATA MODEL:

Object name	Fields in the object	
Object 1	Fieldable	Data type
	Semester Candidate	Custom object Custom object
Object 2	Fieldable	Data type
	Course details	Custom object
	Lecturer details	Custom object
	Internal mark	Custom object

## 2. ACTIVITY & SCREENSHOT

Milestone-1:

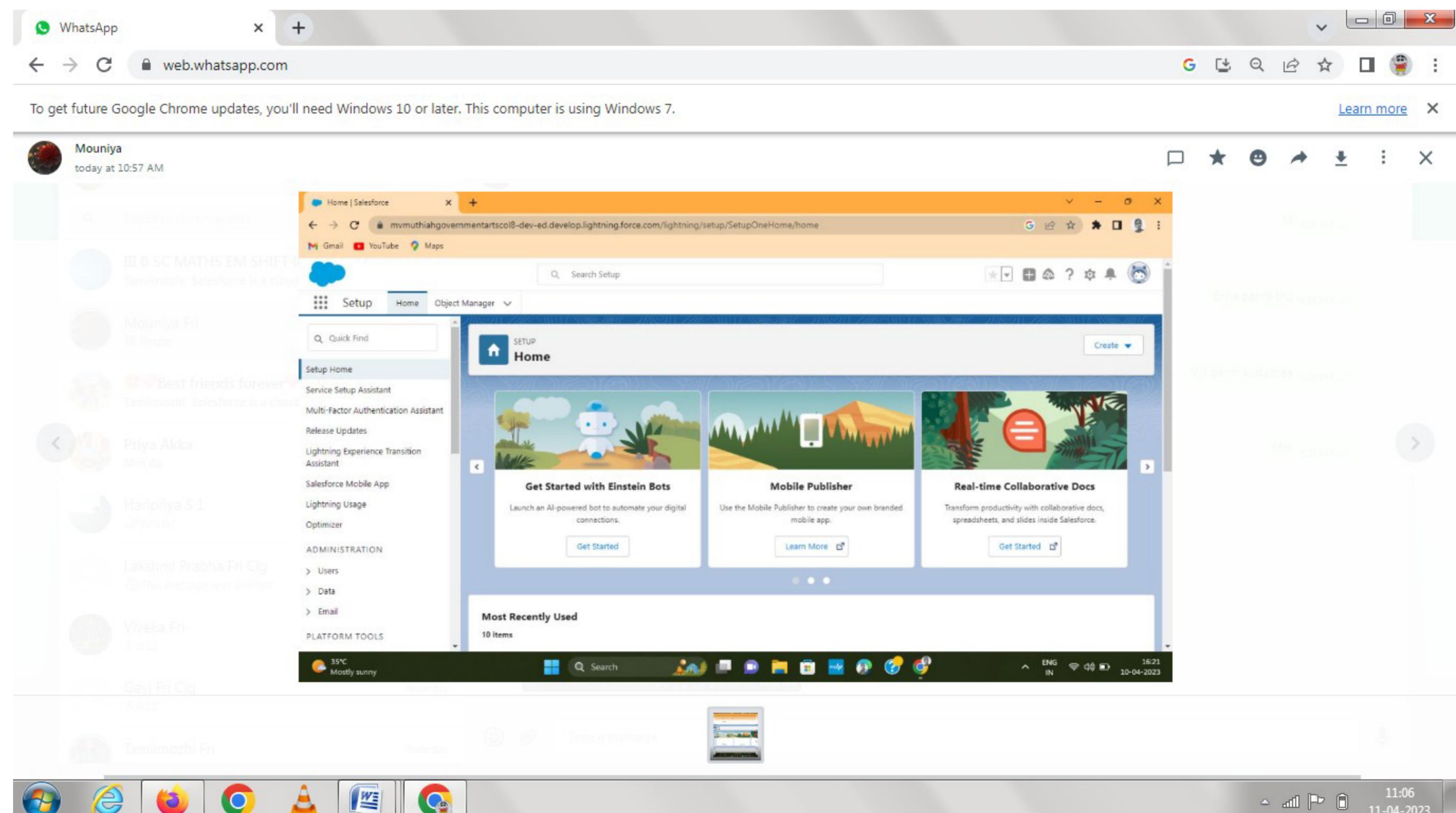
Activity: Creating Developer Account

Creating a developer org in salesforce.

1. Go to [developers.salesforce.com/](https://developer.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](mailto:username@organization.com)

Click on sign up after filling these.



## Milestone-2:

### 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.

### ACTIVITY-2:

Follow Similar steps to create Candidate,Course Details,Lecturer Details,Internal results Objects.

The screenshot shows the Salesforce Setup Home page. The left sidebar has a 'Setup' icon and lists several options under 'Setup Home' like Service Setup Assistant, Multi-Factor Authentication Assistant, etc. Under 'ADMINISTRATION', there are links for Users, Data, and Email. The 'PLATFORM TOOLS' section is also visible. The main area has a 'Search Setup' bar and a table titled 'Object Manager'. The table has columns for NAME, TYPE, and OBJECT. It lists the following items:

NAME	TYPE	OBJECT
Course Details	Custom Object Definition	
Internal results	Custom Object Definition	
Lecturer Details	Custom Object Definition	
Candidate	Custom Object Definition	
Internals results	Custom Tab Definition	Internal results
Lecturers Details	Custom Tab Definition	Lecturer Details
Courses Details	Custom Tab Definition	Course Details
Candidates	Custom Tab Definition	Candidate
Semester	Custom Object Definition	
Semesters	Custom Tab Definition	Semester

## 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.

The screenshot shows the Salesforce Object Manager Fields & Relationships page for the 'Internal results' object. The page displays six fields, all of which are indexed. The fields are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Candidate Id	Candidate_Id_c	Text(6)		✓
Course Id	Course_Id_c	Text(8)		✓
Created By	CreatedById	Lookup(User)		
Internal results Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

## Activity-2: Similarly Create Following Fields according to the objects.

The screenshot shows the Salesforce Object Manager Fields & Relationships page for the 'Internal results' object. The page displays five fields, all of which are indexed. The fields are:

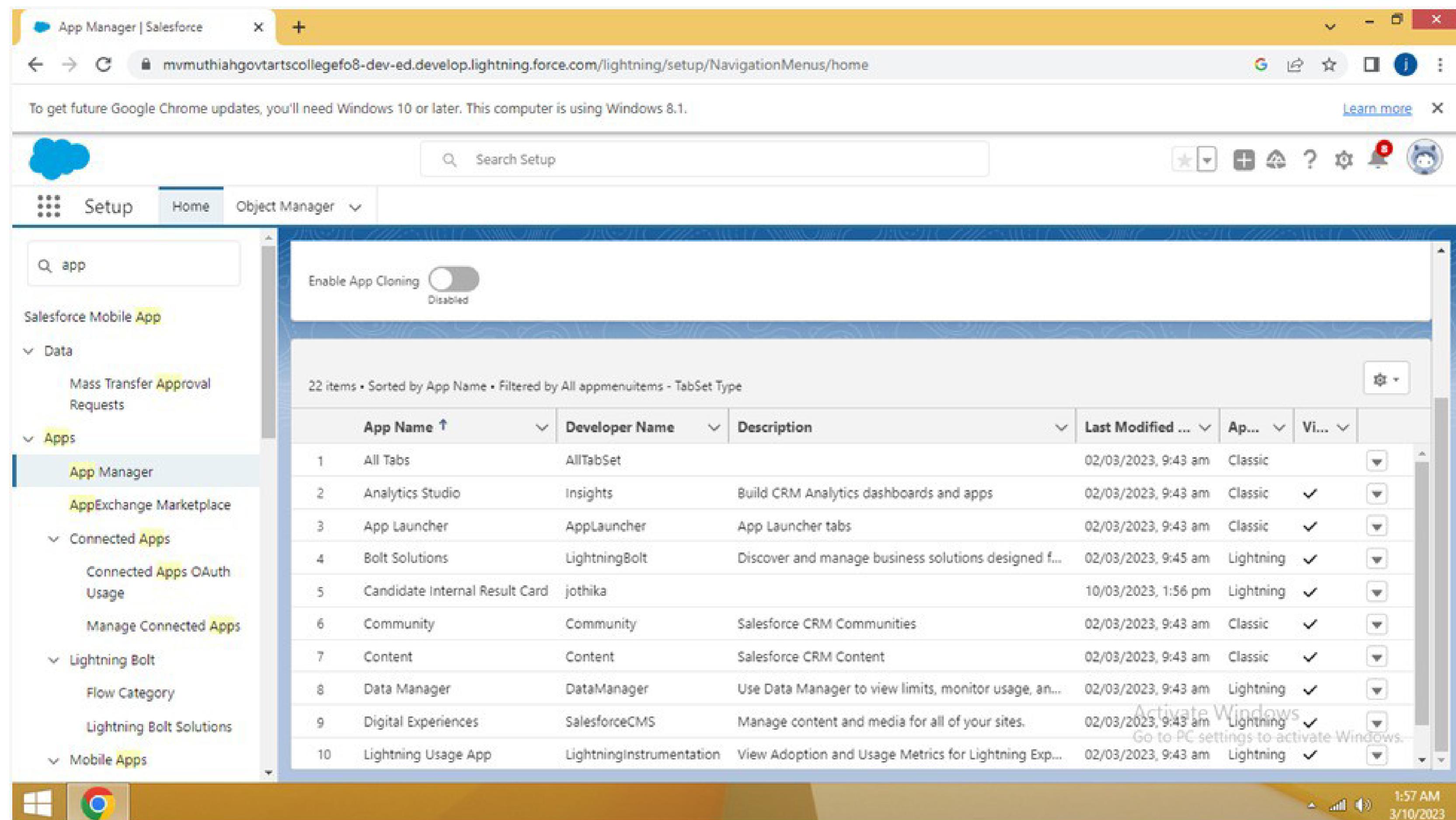
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Candidate Id	Candidate_Id_c	Text(6)		✓
Created By	CreatedById	Lookup(User)		
Internal results Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

## Milestone-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,Internal Results and move them to Selected Items. Click Next.
  - From Available Profiles, select SystemAdministrator 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 .
- . To create a lightning app page:  
Go to setup page → search “ app manager ” in quick find → select “ app manager ” → click on  
New lightning App.



## MILESTONES-4: USERS

### ACTIVITY1:

#### Creating a 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 pas word and notify the user immediately to have the user's login name and temporary pas word 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 Marks by Stage. Click Select. ...
6. For Display As, select Vertical Bar Chart and click Add.
7. Click Save.
8. Click Done

The screenshot shows the Salesforce Lightning interface with the following details:

- Header:** WhatsApp, 3.Implementing\_CRM\_for\_Result, WhatsApp, Dashboards | Salesforce.
- Search Bar:** Search... (with a magnifying glass icon).
- Top Navigation:** Candidate Internal ..., Candidates, Courses Details, Semesters, Lecturers Details, Internals results, Reports, Dashboards.
- Left Sidebar:** Dashboards, Recent (2 items), DASHBOARDS, Recent, Created by Me, Private Dashboards, All Dashboards, FOLDERS, All Folders, Created by Me, Shared with Me, FAVORITES, WhatsApp.html.
- Table:** A table titled "Dashboards" showing recent dashboards. The columns are: Dashboard Name, Description, Folder, Created By, Created On, Subscribed. The data is as follows:

Dashboard Name	Description	Folder	Created By	Created On	Subscribed
candidate board	internal mark	Private Dashboards	jeyalakshmi R	31/3/2023, 1:27 pm	
candidate board		Private Dashboards	jeyalakshmi R	31/3/2023, 1:25 pm	

- Bottom:** Taskbar with icons for Windows, Internet Explorer, Firefox, Chrome, VLC, File Explorer, and Google Sheets. System status bar showing 12:43, 11-04-2023.

## Conclusion:

As our company grows it is increasingly important to streamline processes while supporting the organization with the best talent. Currently, The Company's recruiting processes are labor intensive, manual, and unstructured. Statistically, inefficiencies like these increase recruitment costs and decrease overall company profitability. In order to improve on recruitment efficiency, this presentation proposes the use of an Applicant Tracking System (ATS).  
10: Increase Recruitment Productivity  
Standardize Recruitment Processes  
Improve Recruitstreet and Hiring Compliance  
Facilitate Access to a Larger More Qualified Candidate Pool  
In the pages that follow, a careful analysis of the problem and proposed solution are covered including quantitative and qualitative return on investment from financial, technical, operational, and strategic perspectives.  
Based on the many quantitative and qualitative benefits associated with the use of recruitment technology, it is recommended that [The Company] implement an Applicant Tracking System and supporting technology for job distribution.

**THANKING YOU**