

# PROJECT REPORT

## 1. INTRODUCTION

### 1.1 Overview

Project Name: IMPLEMENTING CRM FOR RESULT TRACKING WITH INTERNAL MARKS

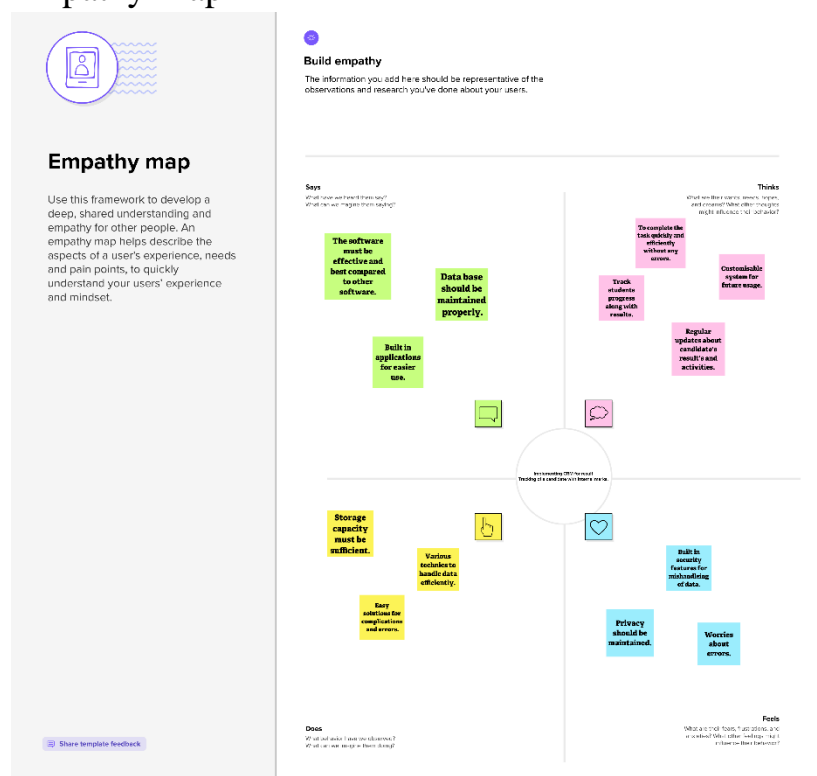
Administrator should be able to create all base data including Semester, Candidate, Course and Lecturer, Lecturer should have the ability to create Internal Results, Dean, who is one of the Lecturer, should be the only one with the ability to update Internal Results. Re-evaluation can be initialised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

### 1.2 Purpose

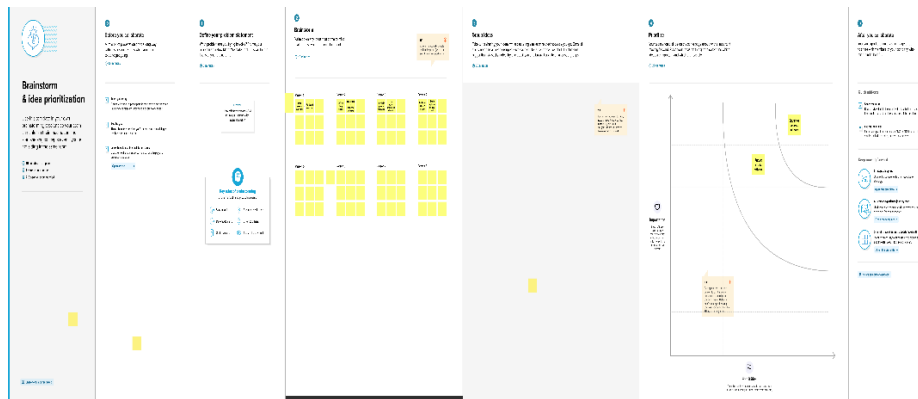
CRM for result tracking with internal marks is used to track Candidates Internal results effectively and easily .It is used to monitor Candidates progress and details. It also provides other details such as Course details, Lecturer details for detailed administration.

## 2. PROBLEM DEFINITION AND DESIGN THINKING

### 2.1 Empathy Map



### 2.2 Ideation and Brainstorming



### 3. RESULT

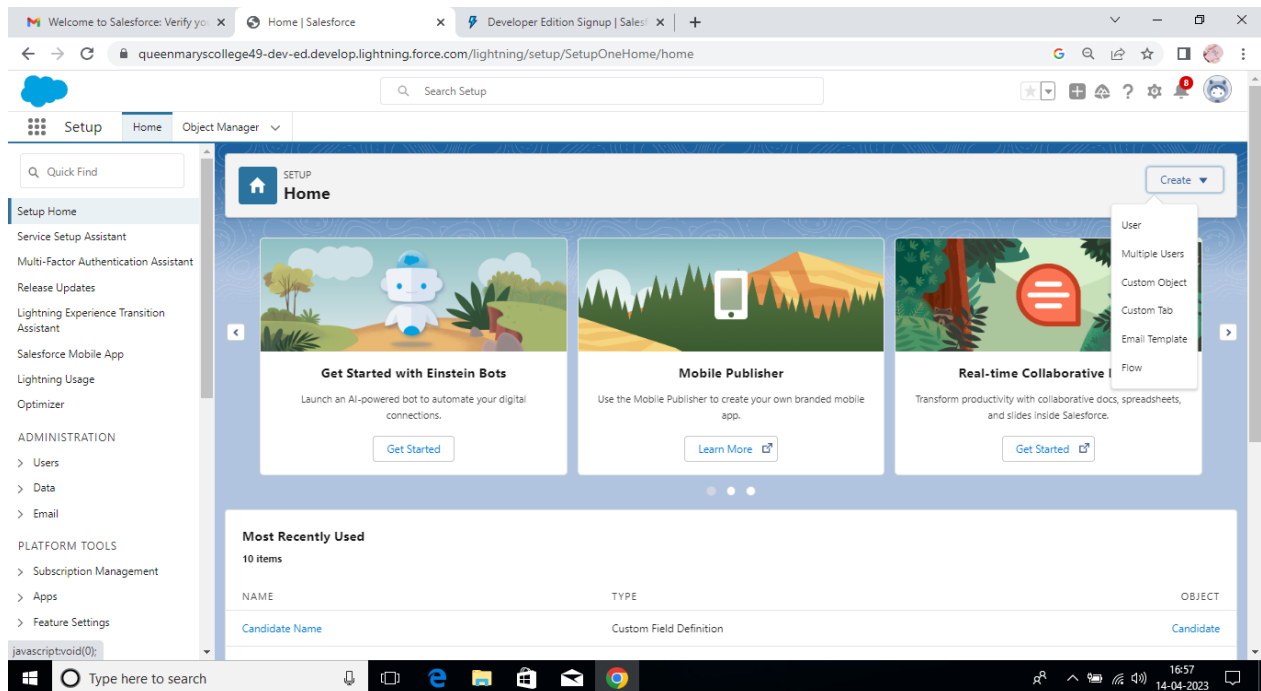
#### 3.1 Data Model

Object Name	Fields In The Object	
Semester	Field label	Data Type
	Semester Name	Text
Course Details	Field Label	Data Type
	Course Name	Text
	Course Id	Text

#### 3.2 Activity and Screenshot

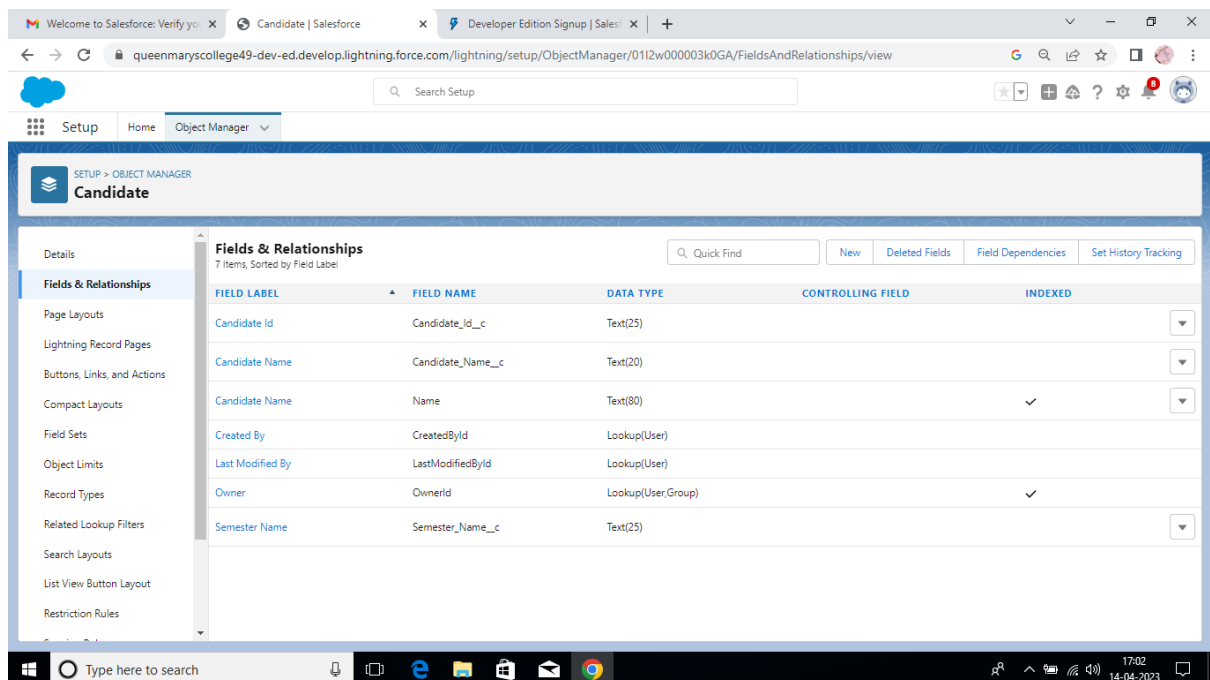
##### Milestone 1: Creating Developer Account.

Go to [developer.salesforce.com](https://developer.salesforce.com) and sign up by entering the details. After signing up go to your mailbox and activate your account by clicking on verify account. Then log in to your salesforce account. After logging in you will see the home page.



## Milestone 2: Creation of Objects and Fields

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



## Milestone 3: Creation of Candidate Internal Result Card App

Inbox (3,721) - catherinejohn14@... x App Manager | Salesforce x Developer Edition Signup | Sales... x

queenmarycollege49-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

Setup Home Object Manager

app manager

Apps

App Manager

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

**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

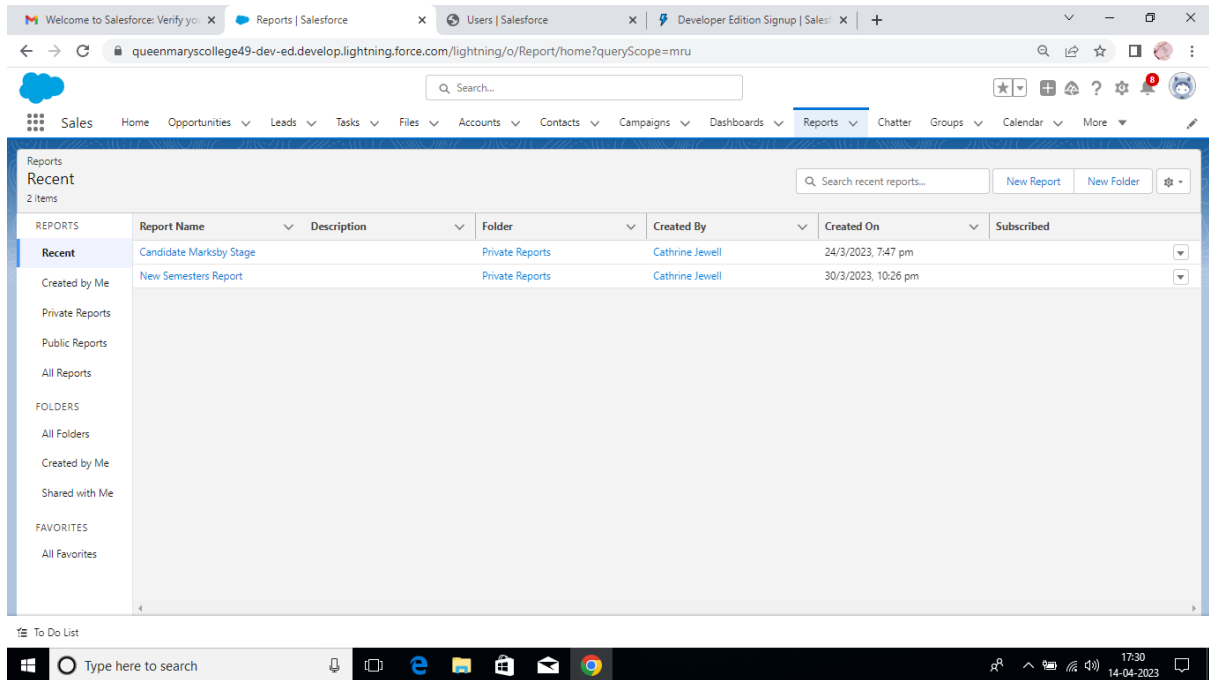
	App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi...	
1	All Tabs	AllTabSet		24/03/2023, 12:41 pm	Classic		
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	24/03/2023, 12:41 pm	Classic	✓	
3	App Launcher	AppLauncher	App Launcher tabs	24/03/2023, 12:41 pm	Classic	✓	
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	24/03/2023, 12:43 pm	Lightning	✓	
5	Candidate Internal Result Ca...	Candidate_Internal_Result_Card		24/03/2023, 1:57 pm	Lightning	✓	
6	Community	Community	Salesforce CRM Communities	24/03/2023, 12:41 pm	Classic	✓	
7	Content	Content	Salesforce CRM Content	24/03/2023, 12:41 pm	Classic	✓	
8	Data Manager	DataManager	Use Data Manager to view, filter, monitor usage, and manage...	24/03/2023, 12:41 pm	Lightning	✓	

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.

[illegible]

## Milestone 5: Report

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.



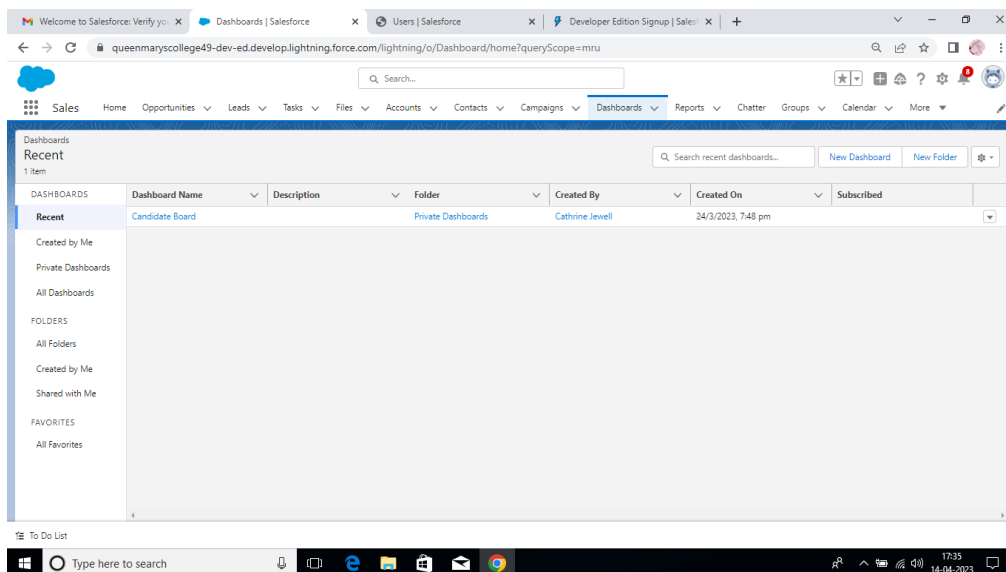
The screenshot shows the Salesforce Reports page. The left sidebar contains navigation links: Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports (selected), Chatter, Groups, Calendar, and More. The main content area is titled 'Reports' and 'Recent' with 2 items. It includes a search bar and buttons for 'New Report' and 'New Folder'. A table lists the reports:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Candidate Marksby Stage		Private Reports	Cathrine Jewell	24/3/2023, 7:47 pm	
Created by Me	New Semesters Report		Private Reports	Cathrine Jewell	30/3/2023, 10:26 pm	

Below the table, there are sections for 'FOLDERS' (All Folders, Created by Me, Shared with Me) and 'FAVORITES' (All Favorites). The bottom of the screen shows a Windows taskbar with the search bar and system tray.

## Milestone 6: Dashboards

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.



The screenshot shows the Salesforce Dashboards page. The left sidebar contains navigation links: Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards (selected), Reports, Chatter, Groups, Calendar, and More. The main content area is titled 'Dashboards' and 'Recent' with 1 item. It includes a search bar and buttons for 'New Dashboard' and 'New Folder'. A table lists the dashboards:

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Candidate Board		Private Dashboards	Cathrine Jewell	24/3/2023, 7:48 pm	

Below the table, there are sections for 'FOLDERS' (All Folders, Created by Me, Shared with Me) and 'FAVORITES' (All Favorites). The bottom of the screen shows a Windows taskbar with the search bar and system tray.

#### **4. TRAILHEAD PROFILE PUBLIC URL**

Team Leader – <https://trailblazer.me/id/divyam22>

Team Member 1 – <https://trailblazer.me/id/brajaraman1>

Team Member 2 – <https://trailblazer.me/id/cathy1416>

Team Member 3 – <https://trailblazer.me/id/dhesm1>

#### **5. ADVANTAGES AND DISADVANTAGES**

##### **Advantages:**

- It helps in tracking Candidates Results and Progress.
- It helps to maintain large data.
- It speeds up the process for Users.
- It allows for the consolidation of customers data and the basis for deep insights.

##### **Disadvantages:**

- It requires proper training to handle the software.
- Security Issues and Third Party Access.
- Dependent on Proper Setup.
- It is Expensive.

#### **6. APPLICATIONS**

It is used by Universities, Schools and Colleges to track Candidate results and Progress. It is used to manage large data. It is also used by many educational institutions to track results.

#### **7. CONCLUSION**

In this project we created a developer account and created custom objects and fields for the objects. Then we created a Candidate Internal Result Card App. Later we created a user profile with the given details. Finally we created a report for Candidate marks and then created a new dashboard at the end.

#### **8. FUTURESCOPE**

A detailed project Manual with pictorial representation can be implemented along with solutions for frequently asked questions for better understanding of the project.

