

<b>Date</b>	
<b>Team ID</b>	<b>NM2023TMID20359</b>
<b>Project Name</b>	IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS
<b>Team Leader</b>	<b>DHANALAKSHMI R</b>
<b>Team Member</b>	<b>DEEPIKA B</b>
	<b>MATHANGI R</b>
	<b>UMA E</b>

# 1 INTRODUCTION

## 1.1 Overview

Our project aims to improve to be able to create all base data including Semester, Candidate, Course and Lecturer 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.

## 1.2 Purpose

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with customers,

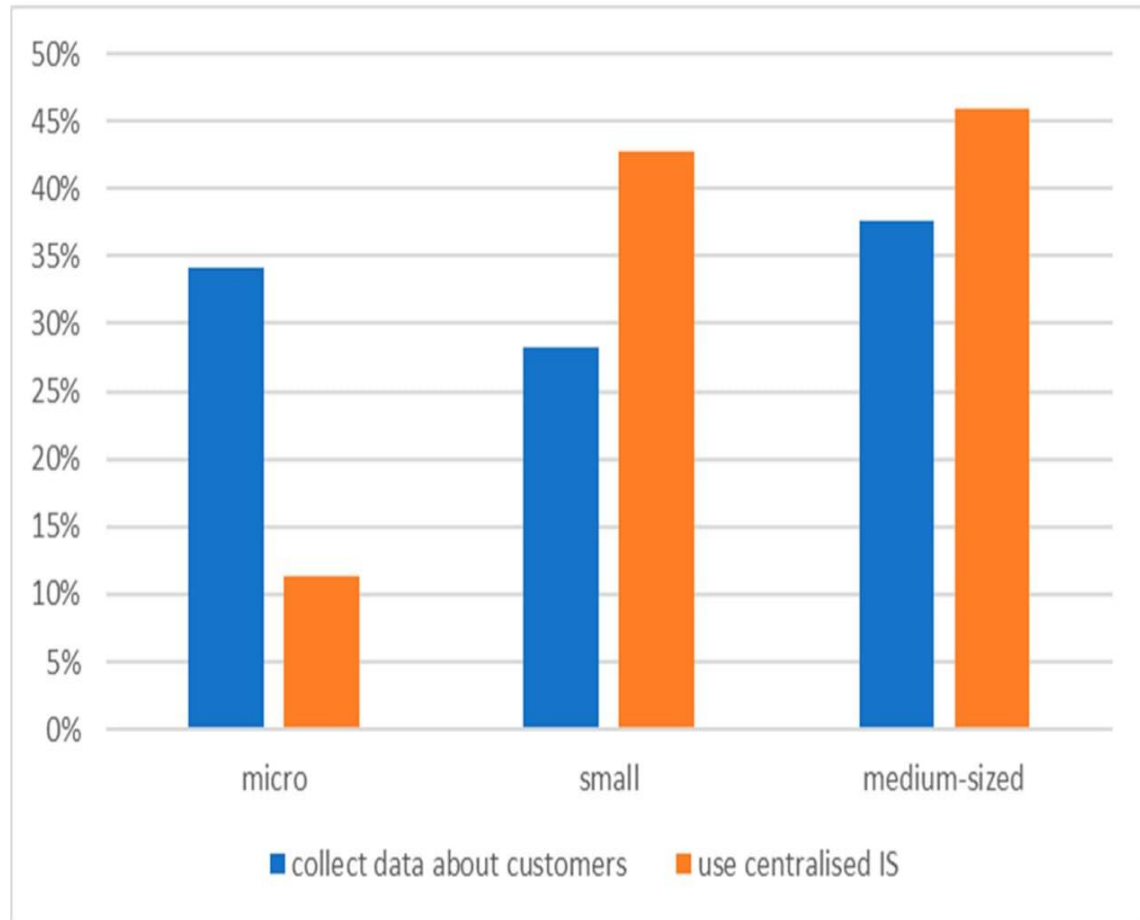
Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and egage with employees and partner, and store your data securely in the cloud.

# 2 MIND MAP AND DESIGN THINGING

## 2.1 CRM Requirements Checklist

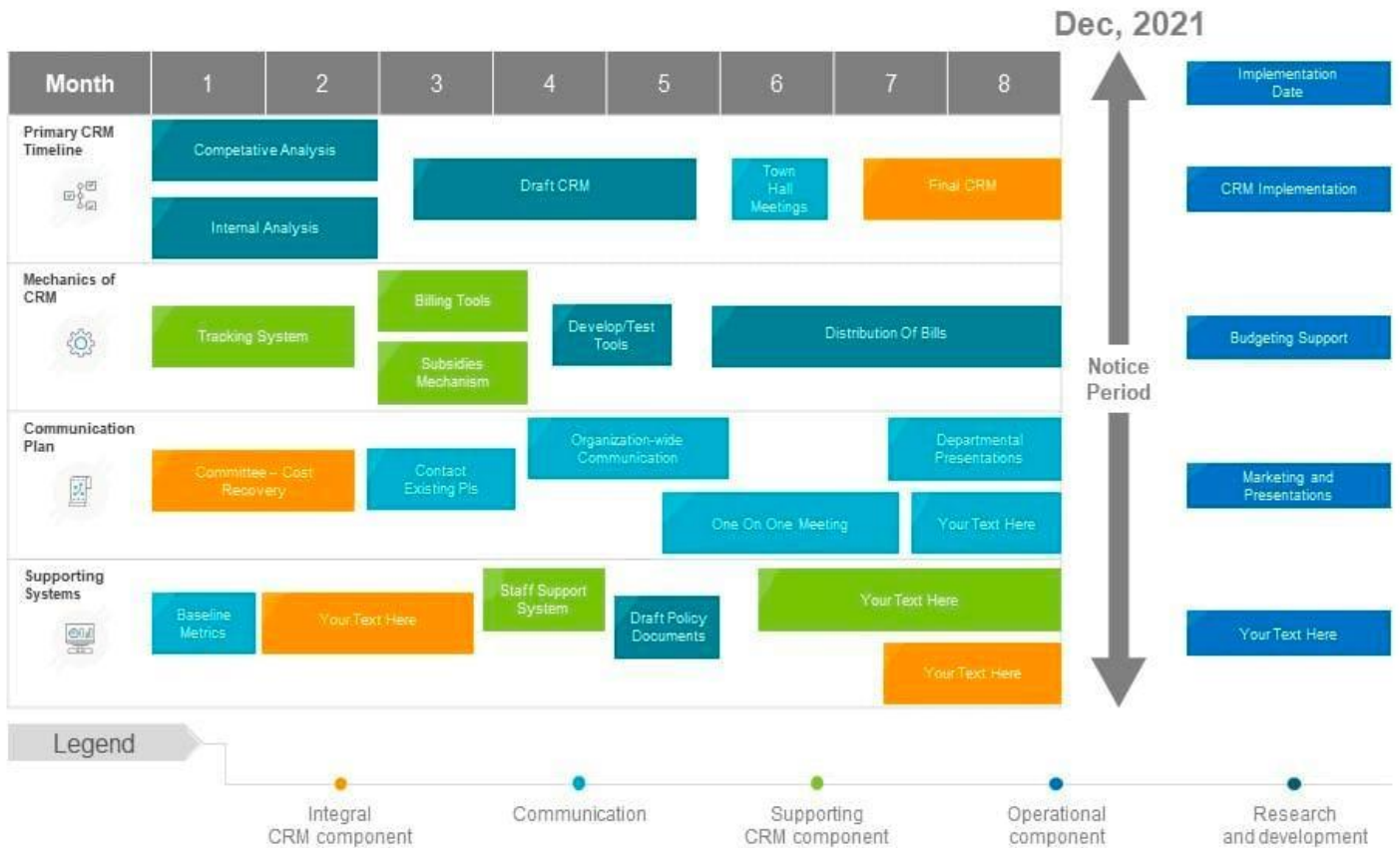


## 2.2 Collecting data about customers and use centralised



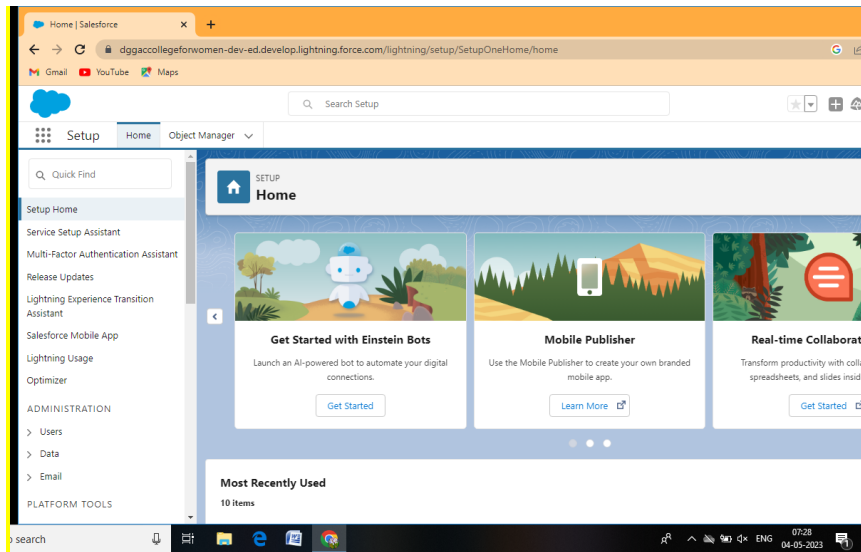
# Monthly CRM Implementation Marketing Timeline with Support Systems

The following slide illustrates the monthly CRM implementation marketing timeline with support system, CRM mechanics, and communication plan.

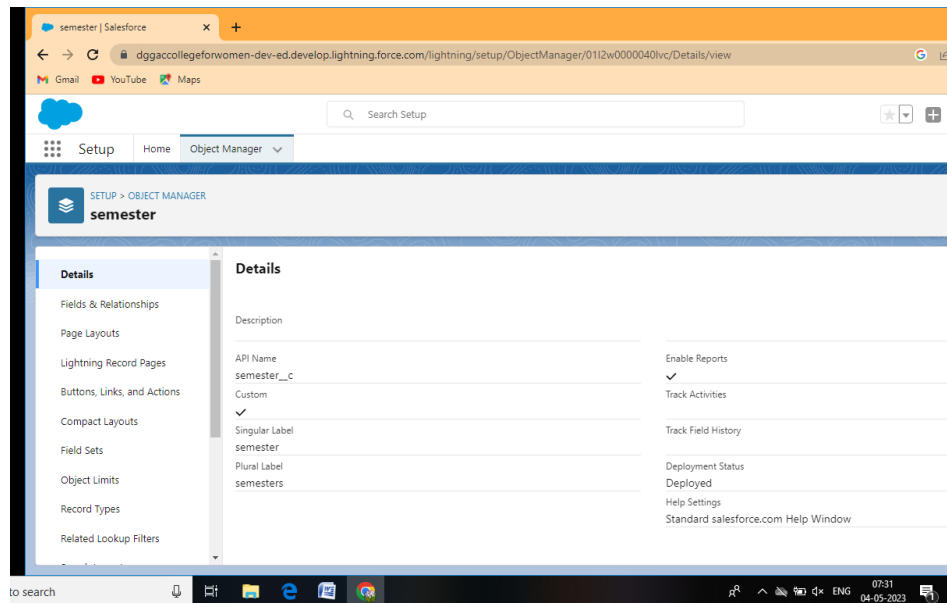


This slide is 100% editable. Adapt it to your needs and capture your audience's attention.

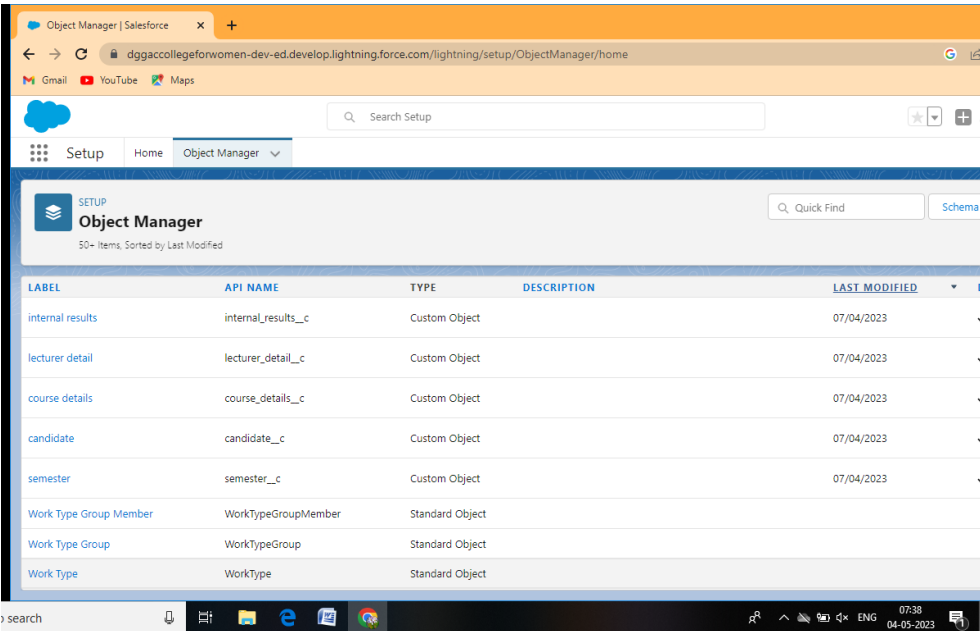
## Milestone 1:



## Creation of salesforce account



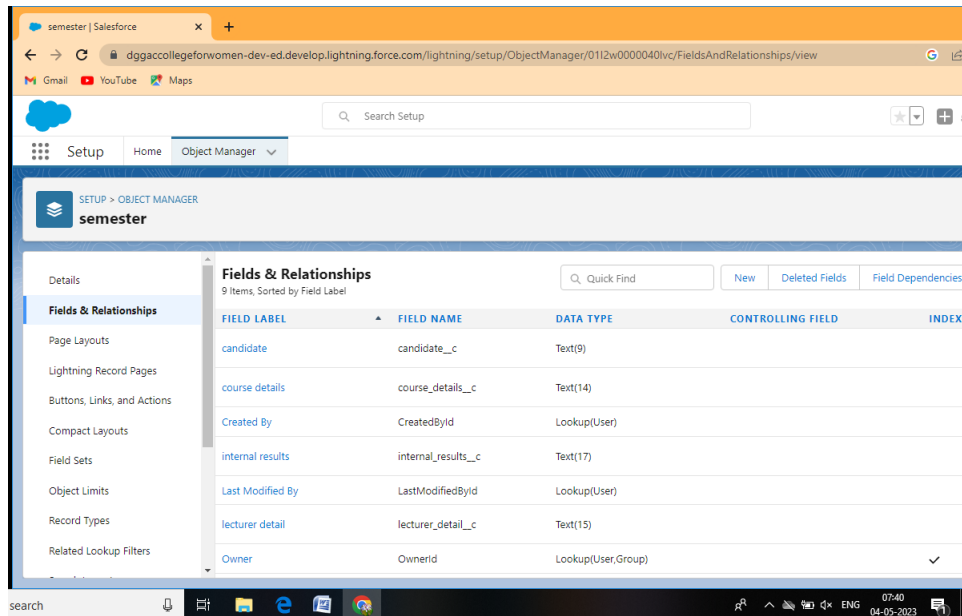
## Milestone 2:



The screenshot shows the Salesforce Object Manager interface. The browser address bar displays the URL: `dggaccollegeforwomen-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The page title is "Object Manager | Salesforce". The navigation bar includes "Setup", "Home", and "Object Manager". The main content area shows a list of objects with columns: LABEL, API NAME, TYPE, DESCRIPTION, and LAST MODIFIED. The objects listed are: internal results, lecturer detail, course details, candidate, semester, Work Type Group Member, Work Type Group, and Work Type. The "candidate" object is highlighted.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
internal results	internal_results__c	Custom Object		07/04/2023
lecturer detail	lecturer_detail__c	Custom Object		07/04/2023
course details	course_details__c	Custom Object		07/04/2023
candidate	candidate__c	Custom Object		07/04/2023
semester	semester__c	Custom Object		07/04/2023
Work Type Group Member	WorkTypeGroupMember	Standard Object		
Work Type Group	WorkTypeGroup	Standard Object		
Work Type	WorkType	Standard Object		

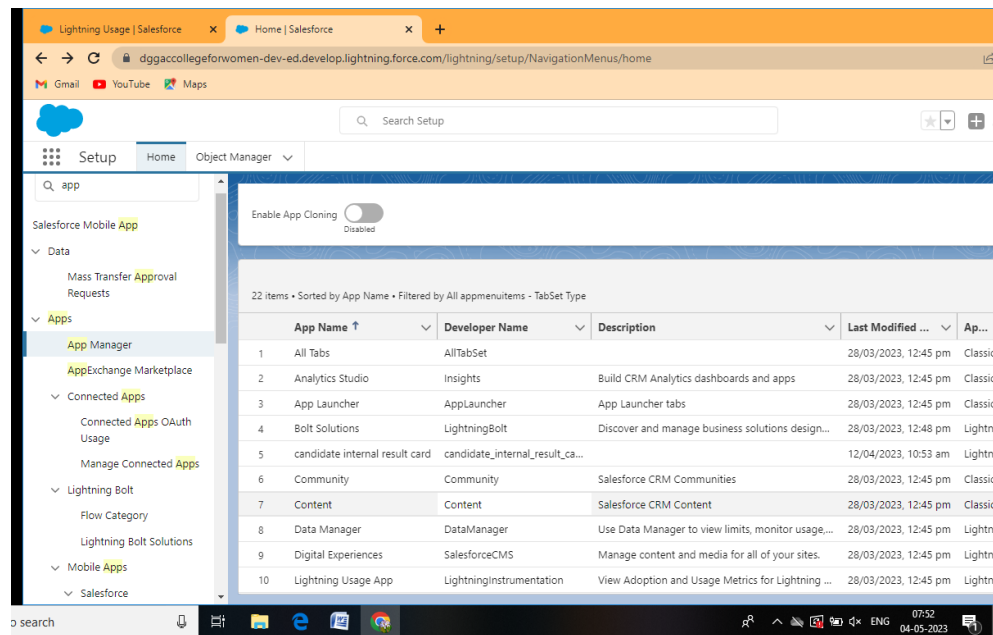
## Milestone 3:



The screenshot shows the Salesforce Object Manager interface for the "candidate" object. The browser address bar displays the URL: `dggaccollegeforwomen-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000040lvc/FieldsAndRelationships/view`. The page title is "semester | Salesforce". The navigation bar includes "Setup", "Home", and "Object Manager". The main content area shows the "Fields & Relationships" section for the "candidate" object. The left sidebar lists various setup options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The "Fields & Relationships" section shows a list of fields with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEX. The fields listed are: candidate, course details, Created By, internal results, Last Modified By, lecturer detail, and Owner.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEX
candidate	candidate__c	Text(9)		
course details	course_details__c	Text(14)		
Created By	CreatedById	Lookup(User)		
internal results	internal_results__c	Text(17)		
Last Modified By	LastModifiedById	Lookup(User)		
lecturer detail	lecturer_detail__c	Text(15)		
Owner	OwnerId	Lookup(User,Group)		✓

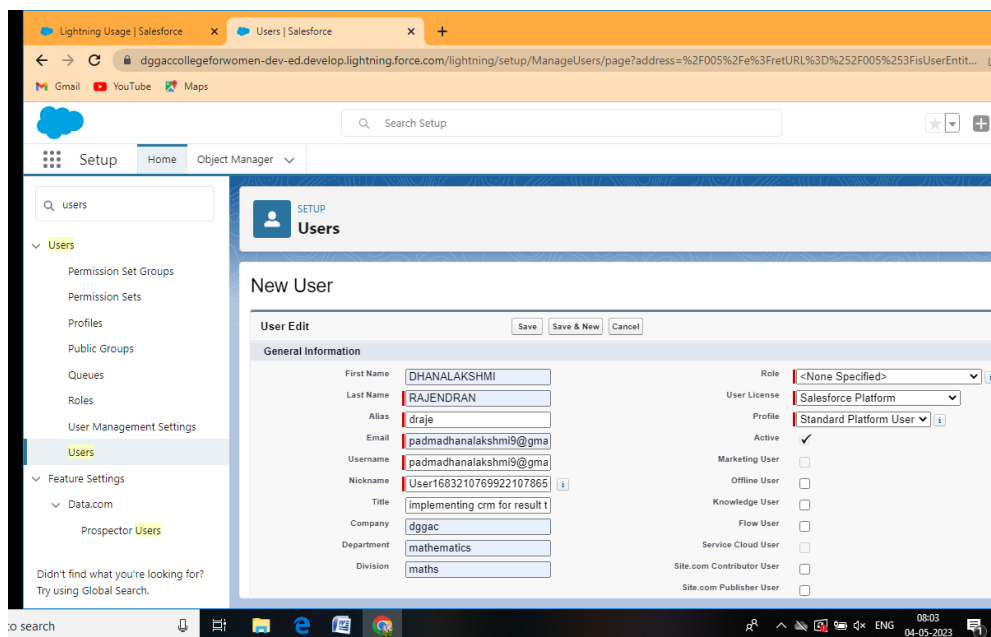
## Milestone 4:



The screenshot shows the Salesforce Lightning Usage Setup page. The left sidebar contains a navigation menu with options like Setup, Home, Object Manager, and a search bar. The main content area displays a table of 22 items, sorted by App Name. The table has columns for App Name, Developer Name, Description, Last Modified, and App Type. The table lists various apps including All Tabs, Analytics Studio, App Launcher, Bolt Solutions, candidate internal result card, Community, Content, Data Manager, Digital Experiences, and Lightning Usage App.

App Name	Developer Name	Description	Last Modified	App...
1 All Tabs	AllTabSet		28/03/2023, 12:45 pm	Classic
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	28/03/2023, 12:45 pm	Classic
3 App Launcher	AppLauncher	App Launcher tabs	28/03/2023, 12:45 pm	Classic
4 Bolt Solutions	LightningBolt	Discover and manage business solutions design...	28/03/2023, 12:48 pm	Lightni
5 candidate internal result card	candidate_internal_result_ca...		12/04/2023, 10:53 am	Lightni
6 Community	Community	Salesforce CRM Communities	28/03/2023, 12:45 pm	Classic
7 Content	Content	Salesforce CRM Content	28/03/2023, 12:45 pm	Classic
8 Data Manager	DataManager	Use Data Manager to view limits, monitor usage,...	28/03/2023, 12:45 pm	Lightni
9 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	28/03/2023, 12:45 pm	Lightni
10 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning ...	28/03/2023, 12:45 pm	Lightni

## Milestone 5:



The screenshot shows the Salesforce Lightning Users Setup page. The left sidebar contains a navigation menu with options like Setup, Home, Object Manager, and a search bar. The main content area displays the 'New User' form. The form has fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. It also has a 'Role' dropdown menu, a 'User License' dropdown menu, and a 'Profile' dropdown menu. The 'Active' checkbox is checked. The 'Marketing User' checkbox is unchecked. The 'Offline User' checkbox is unchecked. The 'Knowledge User' checkbox is unchecked. The 'Flow User' checkbox is unchecked. The 'Service Cloud User' checkbox is unchecked. The 'Site.com Contributor User' checkbox is unchecked. The 'Site.com Publisher User' checkbox is unchecked.

Field	Value
First Name	DHANALAKSHMI
Last Name	RAJENDRAN
Alias	draje
Email	padmadhanalakshmi9@gmail.com
Username	padmadhanalakshmi9@gmail.com
Nickname	User1683210769922107865
Title	implementing crm for result t
Company	dggac
Department	mathematics
Division	maths
Role	<None Specified>
User License	Salesforce Platform
Profile	Standard Platform User
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>

## Milestone 6:

The screenshot shows the Salesforce Lightning Usage Reports interface. The browser address bar displays the URL: `dggaccollegeforwomen-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mr`. The page header includes the Salesforce logo, a search bar, and navigation tabs for Lightning Usage, semesters, candidates, courses details, lecturers detail, internals results, and Reports. The Reports tab is active, showing a 'Recent' section with a search bar and a 'New Report' button. Below this, a table lists reports with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. The table contains one item: 'candidate with candidate marks' in the 'Private Reports' folder, created by 'Dhanalakshmi R' on '12/4/2023, 11:05 am'. A sidebar on the left provides navigation options for Reports (Recent, Created by Me, Private Reports, Public Reports, All Reports), FOLDERS (All Folders, Created by Me, Shared with Me), and FAVORITES (All Favorites). The Windows taskbar at the bottom shows the system clock as 08:07 on 04-05-2023.

Lightning Usage | Salesforce x Reports | Salesforce x +

dggaccollegeforwomen-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mr

Gmail YouTube Maps

Search...

Lightning Usage App Lightning Usage semesters candidates courses details lecturers detail internals results Reports

Reports

Recent

1 item

Search recent reports... New Report

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	candidate with candidate marks		Private Reports	Dhanalakshmi R	12/4/2023, 11:05 am	

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

Task View

search

08:07 04-05-2023



## Milestone 7:

The screenshot shows a Windows 10 desktop environment. On the left is the Start menu with various application icons including VLC media player, Recycle Bin, Google Chrome, Microsoft Edge, and PDF Architect. The taskbar at the bottom contains the search bar and icons for File Explorer, Edge, and Chrome. The active window is a web browser displaying the Salesforce 'Reports and Dashboards Settings' page. The browser's address bar shows the URL 'dggacollegeforwomen-dev-ed.develop.lightning.force.com/lightning/setup/ReportUI/home'. The Salesforce interface includes a navigation sidebar with 'Setup', 'Home', and 'Object Manager' tabs. The main content area is titled 'Reports and Dashboards Settings' and contains sections for 'Report and Dashboard User Interface Settings', 'Confidential Information Disclaimer Settings', and 'Chatter Options'. The 'User Interface' section has three checked options: 'Enable Floating Report Headers (Salesforce Classic only)', 'Enable Dashboard Finder', and 'Enable Inline Editing in Reports (Lightning Experience Only)'. The 'Confidential Information Disclaimer Settings' section has two unchecked options: 'Exclude Disclaimer from Formatted Report Exports in Lightning Experience' and 'Exclude Disclaimer from Report Run Pages and from Printable View Pages (Salesforce Classic Only)'. The 'Chatter Options' section has one unchecked option: 'Enable Dashboard Component Snapshots'. The system clock in the bottom right corner shows the date '04-05-2023' and time '08:20'.

Lightning Usage | Salesforce x Reports and Dashboards Settings: x +

dggacollegeforwomen-dev-ed.develop.lightning.force.com/lightning/setup/ReportUI/home

Gmail YouTube Maps

Search Setup

Setup Home Object Manager

dashboard

Feature Settings

Analytics

Reports & Dashboards

Access Policies

Historical Trending

Report Types

Reporting Snapshots

Reports and Dashboards Settings

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

SETUP Reports and Dashboards Settings

Report and Dashboard User Interface Settings

Modify the behavior of the user interface for report and dashboard pages using the following settings:

User Interface

- ☒ Enable Floating Report Headers (Salesforce Classic only)
- ☒ Enable Dashboard Finder
- ☐ Hides the option to export a report in XLS format in Lightning Experience
- ☒ Enable Inline Editing in Reports (Lightning Experience Only)

Confidential Information Disclaimer Settings

Specify whether or not to exclude a disclaimer that says "Confidential Information - Do Not Distribute" from report footers.

- ☐ Exclude Disclaimer from Formatted Report Exports in Lightning Experience
- ☐ Exclude Disclaimer from Report Run Pages and from Printable View Pages (Salesforce Classic Only)

Chatter Options

- ☐ Enable Dashboard Component Snapshots

Microsoft Office Word 2007

Type here to search

08:20 04-05-2023

## 4 TRAILHEAD PROFILE PUBLIC URL

Team Lead - <https://trailblazer.me/id/dhanr60>

Team Member 1 - <https://trailblazer.me/id/ddeepi53>

Team Member 2 - <https://trailblazer.me/id/mathr20>

Team Member 3 - <https://trailblazer.me/id/umaetb>

## 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.

## DISADVANTAGES

- ❖ Security concerns associated with centralized data..
- ❖ The excess initial time and productivity cost of implementation.
- ❖ It may not suit every business.

## FUTURE SCOPE

In the 21<sup>st</sup> century each and every field is computerized and all works are done by using the modern technologies so it has a good future.