

Project Report Template

Implementing CRM for Result tracking of a candidate with internal marks.

1. INTRODUCTION

1.1 Overview

Customer relationship management (CRM) is **the combination of practices, strategies and technologies that companies use to manage and analyze 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.

1.2 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



Empathy map

Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.



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Build empathy

The information you add here should be representative of the observations and research you've done about your users.



Says

What have we heard them say?
What can we imagine them saying?

The candidate may express more concern or questions about their internal marks to their teachers or peers.

They may also seek out additional resources, such as tutoring or study groups.

They may put in extra effort to improve their performance or prioritize studying over other activities.

The candidate may feel anxious about their internal marks and how they will affect their overall grade.

What are their wants, needs, hopes, and dreams? What other thoughts might influence their behavior?

They may feel stressed from their performance in particular subjects or assessments.

They may also feel a sense of pressure to do well in order to meet their own expectations or those of family and peers.

Thinks

What are their wants, needs, hopes, and dreams? What other thoughts might influence their behavior?

They may feel stressed from their performance in particular subjects or assessments.

Studying hard to improve their scores

Seeking help from teachers or tutors

Participating in extra-curricular activities to relieve stress

The candidate may feel anxiety and stress about their internal marks and how they will impact their performance and future prospects.

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Does

What behavior have we observed?
What can we imagine them doing?

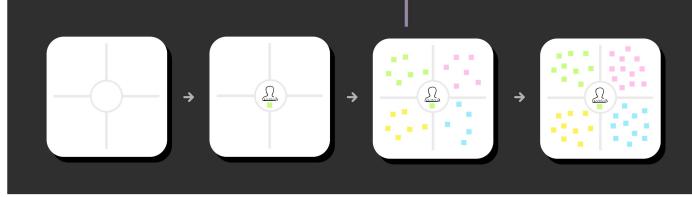
Using extra-curricular activities to relieve stress

The candidate may feel anxiety and stress about their internal marks and how they will impact their performance and future prospects.

The candidate may feel anxious and stressed about their internal marks and how they will impact their performance and future prospects.

Feels

What are their fears, frustrations, and anxieties? What other feelings might influence their behavior?



2.2 Ideation & Brainstorming Map

Template



Brainstorm & idea prioritization

Use this template in your own brainstorming sessions so your team can unleash their imagination and start shaping concepts even if you're not sitting in the same room.

⌚ 10 minutes to prepare
📅 1 hour to collaborate
👥 2-8 people recommended

Importance

Provide teachers and administrators with access to the CRM system so they can track the progress of their students and provide targeted support as needed

Determine what data points you will need to collect in order to track these metrics. This could include things like exam scores, attendance records, and feedback from teachers

Choose a CRM platform that handles the data points you want to track and that can integrate with your existing systems, such as your student information system.

Feasibility

Identify the key metrics that you want to track and prioritize them based on their importance. Some key metrics could include exam scores, attendance, participation in extracurricular activities, and overall academic performance

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Choose a CRM platform that can handle the data points you want to track and that can integrate with your existing systems, such as your student information system.

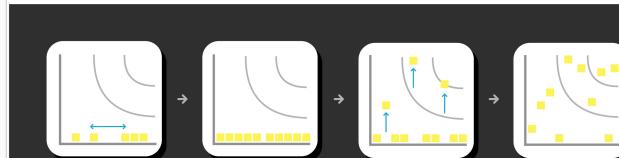
4 Prioritize

Your team should all be on the same page about what's important moving forward. Place your ideas on this grid to determine which ideas are important and which are feasible.

⌚ 20 minutes



Share  Need some inspiration? See a finished version of this template to kickstart your work. Open example →

3. RESULT

3.1 Data Model:

Object Name	Field in the Object	
	Field Label	Data Type
Semster Candidate course	Semester name	text
	Candidate name	Text
	Course details	text
Lecturer details Internal results	Lecturer name	text
	Internal marks	text

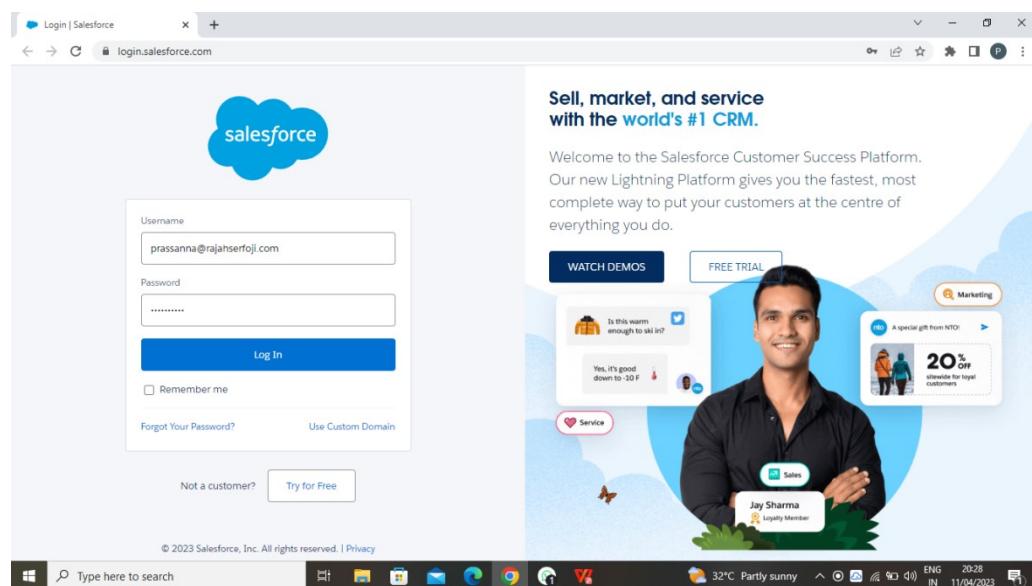
3.2

Activity & Screenshot

Milestone 1: Creation Salesforce Org

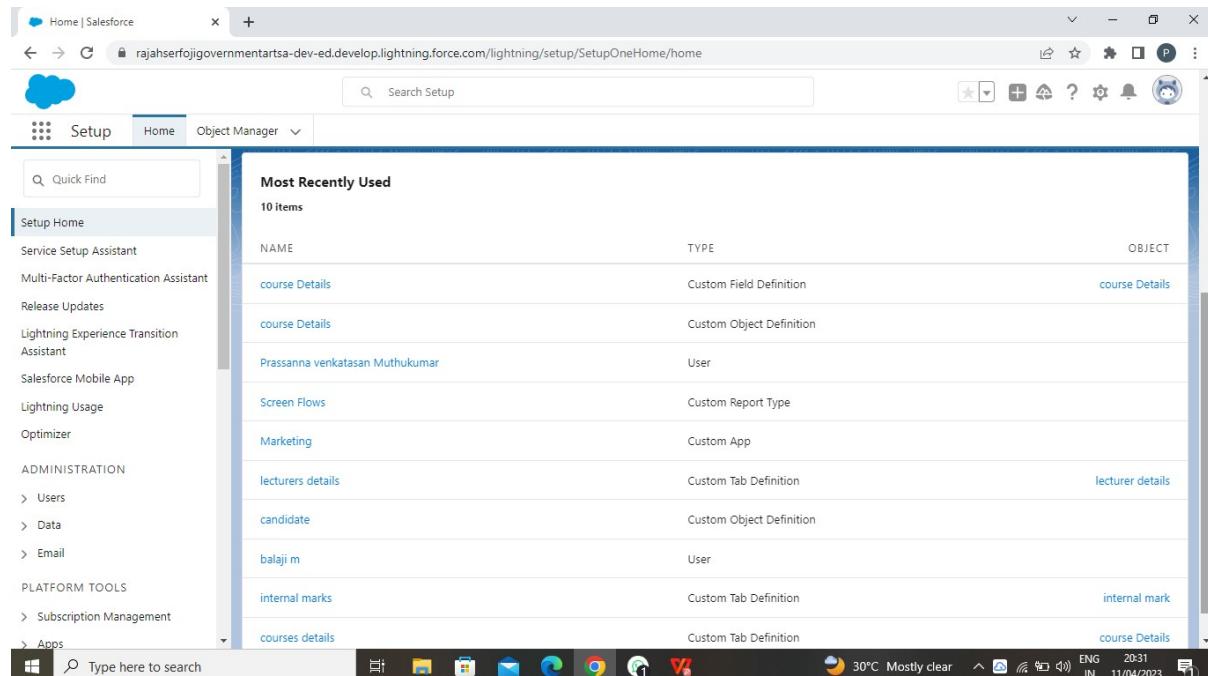
Login To Your Salesforce Account

1. Go to salesforce.com and click on login.
2. Enter the username and password that you just created.
3. After login this is the home page which you will see



Milestone-2:Object

Salesforce objects are database tables that permit you to store data that is specific to an organisation. 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



Milestone -2:Fields 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.

The image displays two screenshots of the Salesforce Object Manager Fields & Relationships page. Both screenshots show a table with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

internal mark Object Manager

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
internal mark	internal_mark__c	Text(10)		
internal mark Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

lecturer details Object Manager

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
lecturer details	lecturer_details__c	Text(23)		
lecturer Name	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓

Semester | Salesforce

rajahserfojigovernmentartsa-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01l2w000004Eadp/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

semester

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

Fields & Relationships

5 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
semester	semester_c__c	Text(22)		▼
semester Name	Name	Text(80)		✓

https://rajahserfojigovernmentartsa-dev-ed.develop.lightning.force.com/one/one...

Type here to search

30°C Mostly clear ENG IN 20:34 11/04/2023

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
candidate	candidate_c	Text(20)		
candidate Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
candidate Name	Name	Text(80)		✓
course Details	course_Details_c	Text(22)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

Milestone-3:Lightning App

To create a lightning app page:

Go to setup page → search “app manager” in quick find → select “app manager” → click on New lightning App

App Manager | Salesforce

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

Setup Home Object Manager

Search Setup

Lightning Experience App Manager

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

29 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

App Name ↑	Developer Name	Description	Last Modified ...	App Type	Vi...
All Tabs	AllTabSet	Manage CRM for Result tracking	20/03/2023, 7:22 pm	Classic	✓
Analytics Studio	Insights	Build CRM Analytics dashboards an...	20/03/2023, 7:22 pm	Classic	✓
App Launcher	AppLauncher	App Launcher tabs	20/03/2023, 7:22 pm	Classic	✓
Bolt Solutions	LightningBolt	Discover and manage business solu...	20/03/2023, 7:25 pm	Lightning	✓
candidate internal result card	candidate_internal_result_ca...	07/04/2023, 2:27 pm	Lightning	✓	

Type here to search

29°C Mostly clear 20:41 ENG IN 11/04/2023

candidate internal result card - L

rajahserfojigovernmentartsa-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02u2w000005ZKCvAO&retUrl=https%3A%2F%2Frajahserfojigov...

Lightning App Builder App Settings Pages candidate internal result card Help

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name

* Developer Name

Description

App Branding

Image

Primary Color Hex Value

Org Theme Options Use the app's image and color instead of the org's custom theme

App Launcher Preview

ci candidate internal result card

Type here to search

29°C Mostly clear 20:40 ENG IN 11/04/2023

The screenshot shows the Lightning App Builder interface. On the left, there's a sidebar with 'App Settings' and 'Navigation Items' selected. Under 'Navigation Items', there's a list of available items: Accounts, Alert Settings, All Sites, Alternative Payment Methods, App Launcher, Appointment Invitations, Approval Requests, and Asset Action Sources. To the right, a 'Selected Items' list contains 'semesters', 'candidates', 'courses details', 'lecturers details', and 'internal marks'. A search bar at the top says 'Type to filter list...'.

Milestone-4: 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.

The screenshot shows the Salesforce Setup interface under 'Manage Users'. The left sidebar has 'Users' selected. The main page displays a table of 'All Users' with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users, including 'Chatter Expert', 'm_bala', 'Muthukumar Prassanna venkatasan', 'User Integration', and 'User Security'. At the bottom, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

Milestone-5: 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.

The screenshot shows the Salesforce Report Builder interface. The title bar reads "Report Builder | Salesforce". The main window is titled "Create Report" and displays a search bar for "Select a Report Type" with the query "internal marks". A table lists a single report type: "internal marks" under "Report Type Name" with "Standard" under "Category". To the left, a sidebar shows categories like "Recently Used" and "All". The bottom status bar shows system information: 29°C, Mostly clear, ENG IN, 21:31, 11/04/2023.

The screenshot shows the Salesforce Report Builder interface with a report titled "New internal marks Report" previewed. The report table has four columns: "internal mark: internal mark Name", "internal mark: ID", "internal mark", and "internal mark: Created Date". The data rows are:

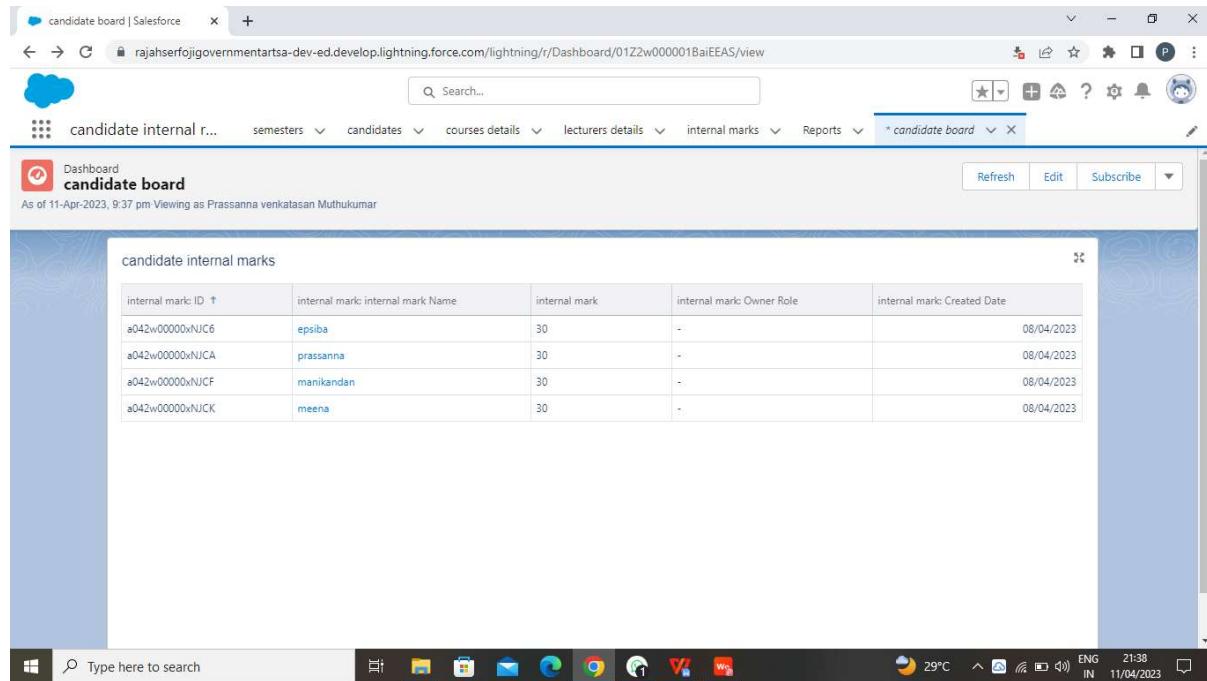
	internal mark: internal mark Name	internal mark: ID	internal mark	internal mark: Created Date
1	meena	a042w00000xNICK	30	08/04/2023
2	epsiba	a042w00000xNJCF6	30	08/04/2023
3	manikandan	a042w00000xNJCF	30	08/04/2023
4	prassanna	a042w00000xNJCA	30	08/04/2023

The sidebar includes sections for "Fields", "Outline", and "Filters". The bottom status bar shows system information: 29°C, Mostly clear, ENG IN, 21:33, 11/04/2023.

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 a Salesforce Lightning dashboard titled "candidate internal r...". The dashboard includes a search bar and navigation links for "semesters", "candidates", "courses details", "lecturers details", "internal marks", "Reports", and "candidate board". The main content area displays a table titled "candidate internal marks" with the following data:

internal mark: ID	internal mark: internal mark Name	internal mark	internal mark: Owner Role	internal mark: Created Date
a042w00000xNJc6	epsiba	30	-	08/04/2023
a042w00000xNJCA	prassanna	30	-	08/04/2023
a042w00000xNJCF	manikandan	30	-	08/04/2023
a042w00000xNJCK	meena	30	-	08/04/2023

4. Trailhead Profile Public URL

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

Team Member 1 -<https://trailblazer.me/id/manikandanb2411>

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

Team Member 3 –<https://trailblazer.me/id/epsi368123>

5. ADVANTAGES & DISADVANTAGE

Advantage:

It allows for more effective relation between candidate and marks.

It increases staff productivity, lowers time costs and boosts morale.

Disadvantage:

Security concerns associated with centralised data.
The excess initial time and productivity cost of implementation

6. APPLICATIONS

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. Have a multilevel approval process for the re-evaluation of the internal marks, 1st level by lecturer and 2nd level by dean. Now only dean can update the marks after re-evaluation. Dean should be able to see list of Candidates grouped by Marks (Pass / Fail) in each Semester – should be a Visual Force page. Dean should be able to see average percentage of each Course for a Candidate. Dean should have the ability to view Pass percentage for each Semester

7. CONCLUSION

Implementing a CRM system is a value-adding process that can bring great benefits to any business. The ultimate goal is **to improve communication and interaction with real customers and leads, and to maximise their impact on the production process and business figures.**

8. FUTURE SCOPE

Customers will become a company's best sales reps through superior products and services as well as customer-oriented messaging. The future of CRM is more than just the future of Customer Relationship Management software. It is really the future of business.