

PROJECT REPORT

IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS

INTRODUCTION

Overview:

Salesforce is the world's number one customer relationship management (CRM) platform. It helps in marketing, service, commerce, and IT teams work as one from anywhere in the world. This can help field sales team ensure that order fulfilled quickly and accurately and that inventory levels are maintained at optimum levels.

PURPOSE:

It aims to produce real-time knowledge of the salesforce and how can we build a app using salesforce tools in this project we build a candidate result and application for educational institutional, which would be useful for the staff to reduce time and track the performance of the students with ease. It is helpful to have large number of data minimized under platform.

LITERATURE SURVEY:

A CRM system can be used to improve the relationship you have with candidates. You can use it to communicate with them effectively, meaning they will be more likely to respond when you send them an email inviting them for an interview or informing them of their status in your recruitment process. Implementation of CRM in enterprises serves not only to maintain existing customers and acquire new ones but also introduces integration in the company, improves processes and communication between individual departments.

THEORITICAL ANALYSIS:

Block diagram: Diagrammatic view of the project:

Implementing CRM for result tracking of a candidate with internal marks:-

Create Salesforce org- a) Creating Developer Org

b) Account Activation



Object – Creation of semester object for candidate internal result card.



What is a Tab?- Creation of semester tab for candidate internal card.



Lightning App- Create the candidate for internal result card app.



Fields and relationships- a) Creation of text field on lecturer details and lookup fields for the candidate object . b) Creation Of Auto Number Field On Candidate Object, Number Field On Course Details Object & Formula Field Course Details Object.



Users- Creating a user



User adoption- a) Create Record (Course details)

b) View Record (Course details)

c) Delete Record (Course details)



Reports- a) Create Reports

b) View Reports



Dashboards-a) Create Dashboards.

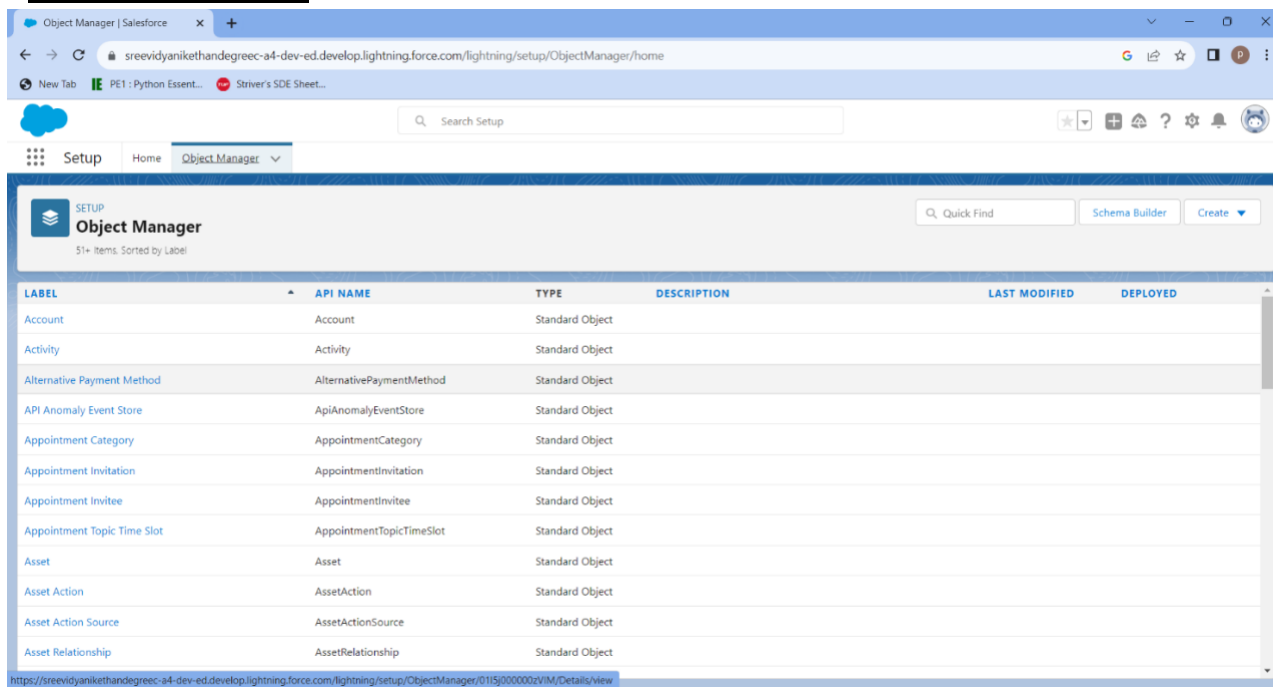
b) View Dashboards.

CREATION OF OBJECTS:

The screenshot displays the Salesforce Setup Home interface. The left sidebar contains a 'Quick Find' search bar and a list of navigation items: Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION (with sub-items Users, Data, Email), PLATFORM TOOLS (with sub-items Subscription Management, Apps), and a 'Create' button. The main content area is titled 'SETUP Home' and features three prominent cards: 'Get Started with Einstein Bots' (with a 'Get Started' button), 'Mobile Publisher' (with a 'Learn More' button), and 'Real-time Collaborative Docs' (with a 'Get Started' button). Below these cards is a 'Most Recently Used' section indicating '10 Items'. A table below this section shows the following data:

NAME	TYPE	OBJECT
semester name	Custom Field Definition	semester

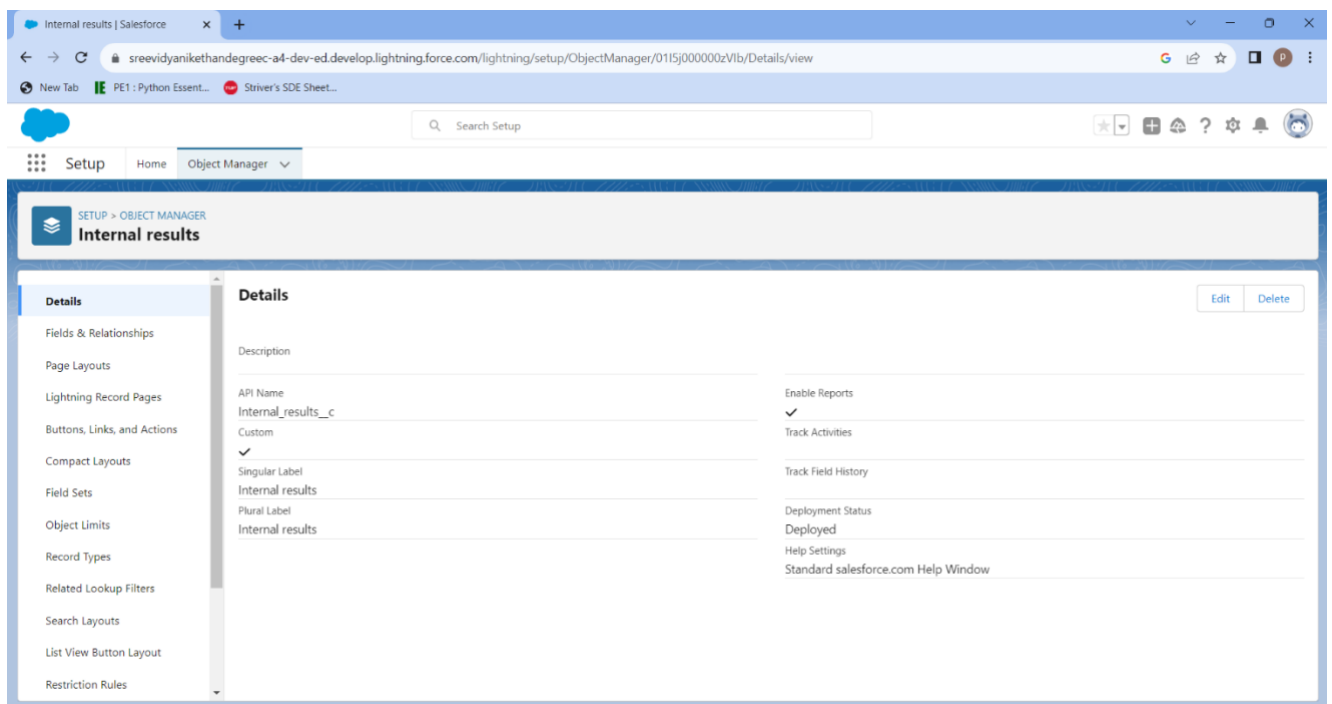
CUSTOM OBJECTS:



The screenshot shows the Salesforce Object Manager interface. The browser address bar displays the URL: `sreevidyanikethandegreec-a4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The page title is "Object Manager" with a subtitle "51+ Items, Sorted by Label". A search bar labeled "Search Setup" is at the top right. Below the header, there's a "Quick Find" bar and buttons for "Schema Builder" and "Create". The main content area is a table with columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The table lists various standard objects like Account, Activity, Alternative Payment Method, etc.

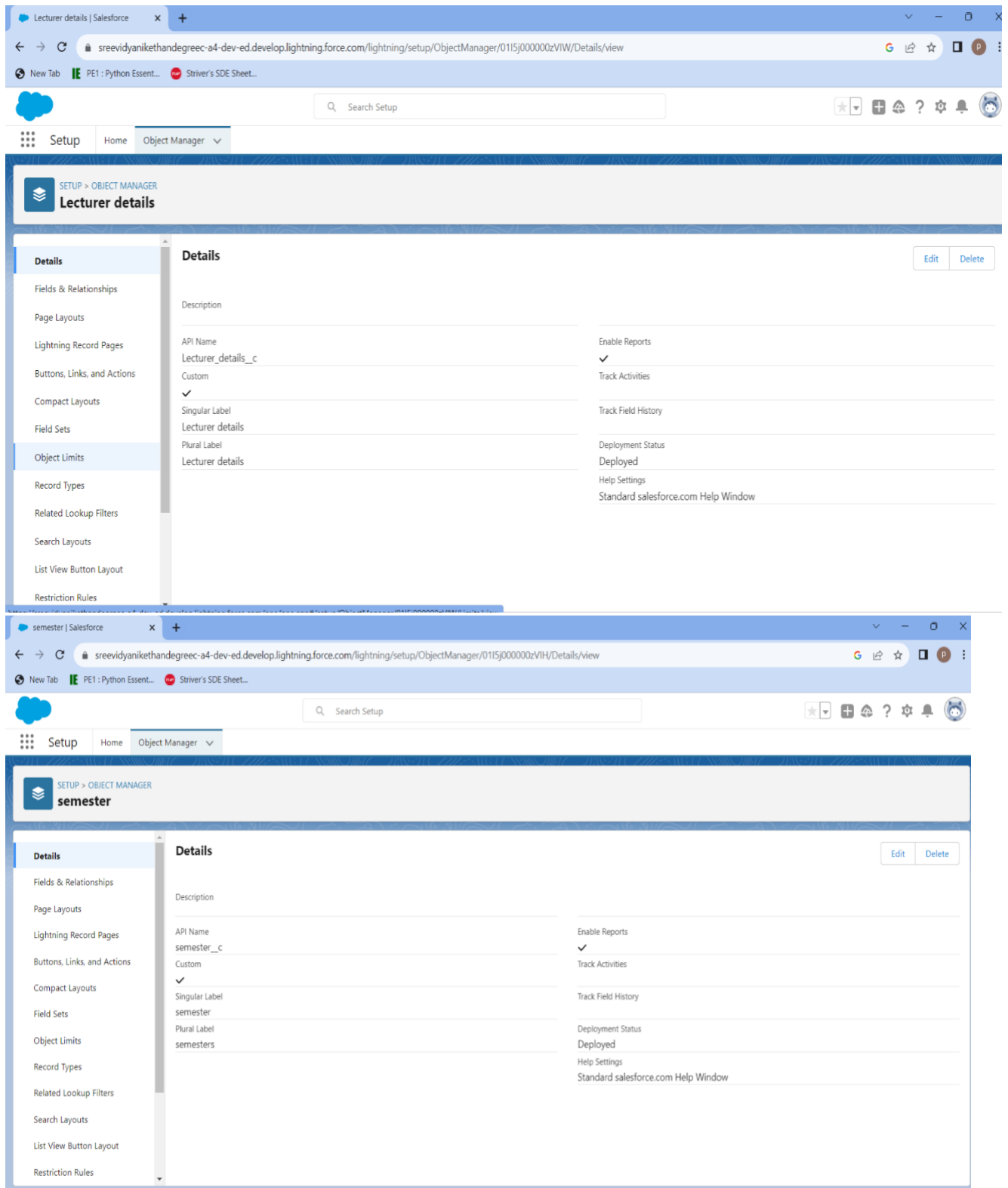
LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment Category	AppointmentCategory	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Asset	Asset	Standard Object			
Asset Action	AssetAction	Standard Object			
Asset Action Source	AssetActionSource	Standard Object			
Asset Relationship	AssetRelationship	Standard Object			

creation of object for candidate internal result card. For this candidate internal result card we need to create 5 objects that are semester, candidate, course details, lecturer details, internal results.



The screenshot shows the Salesforce Object Manager interface for the "Internal results" object. The browser address bar displays the URL: `sreevidyanikethandegreec-a4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015j000000zVlb/Details/view`. The page title is "Internal results". A search bar labeled "Search Setup" is at the top right. Below the header, there's a "Quick Find" bar and buttons for "Edit" and "Delete". The main content area is divided into two sections: "Details" and "Fields & Relationships". The "Details" section shows the object's configuration, including the API Name "Internal_results_c", Singular Label "Internal results", Plural Label "Internal results", and various settings like "Enable Reports", "Track Activities", "Track Field History", "Deployment Status", "Help Settings", and "Standard salesforce.com Help Window".

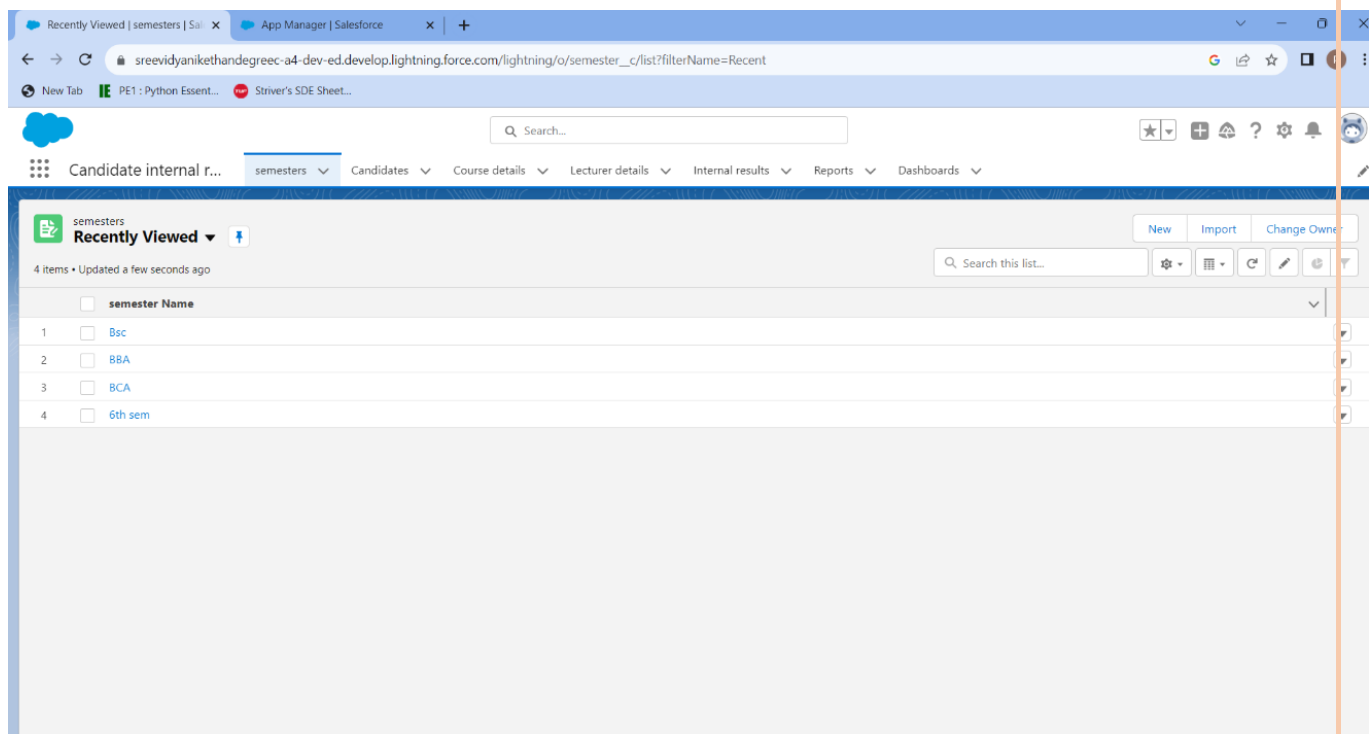
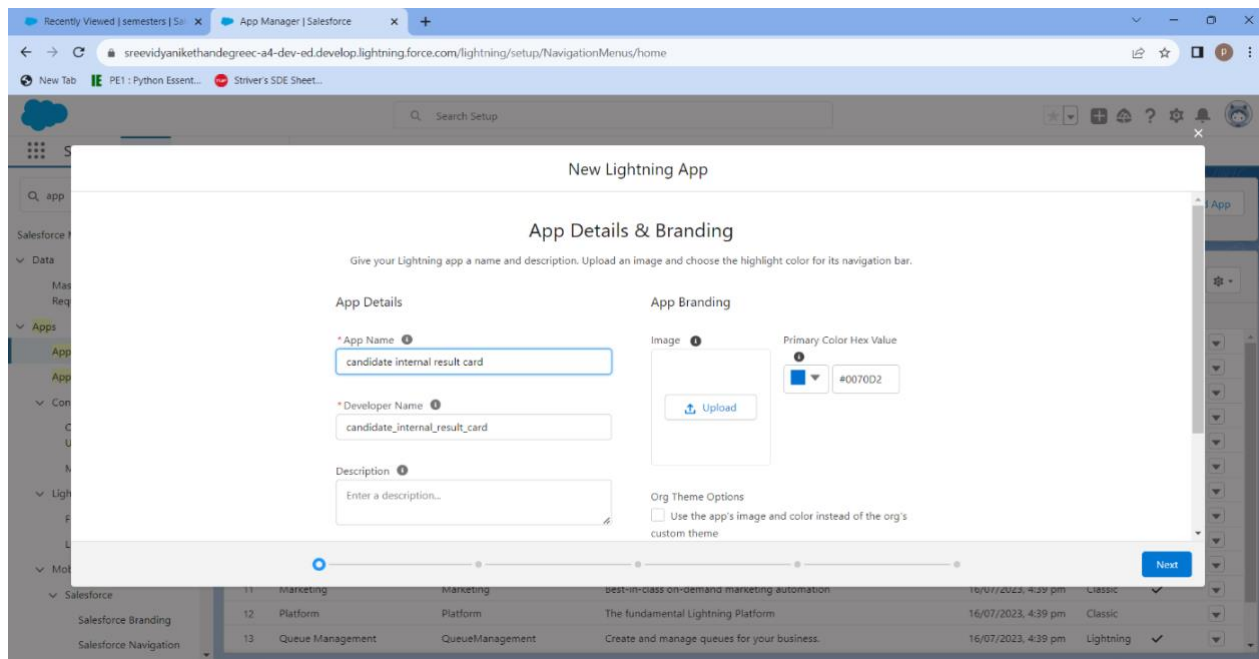
Details
Description
API Name Internal_results_c
Custom
Singular Label Internal results
Plural Label Internal results
Enable Reports ✓
Track Activities ✓
Track Field History
Deployment Status Deployed
Help Settings Standard salesforce.com Help Window



Relationship are created custom relationship& fields on an object this is done for the users to to view records, they can also see and access related data.

LIGHTNING APP

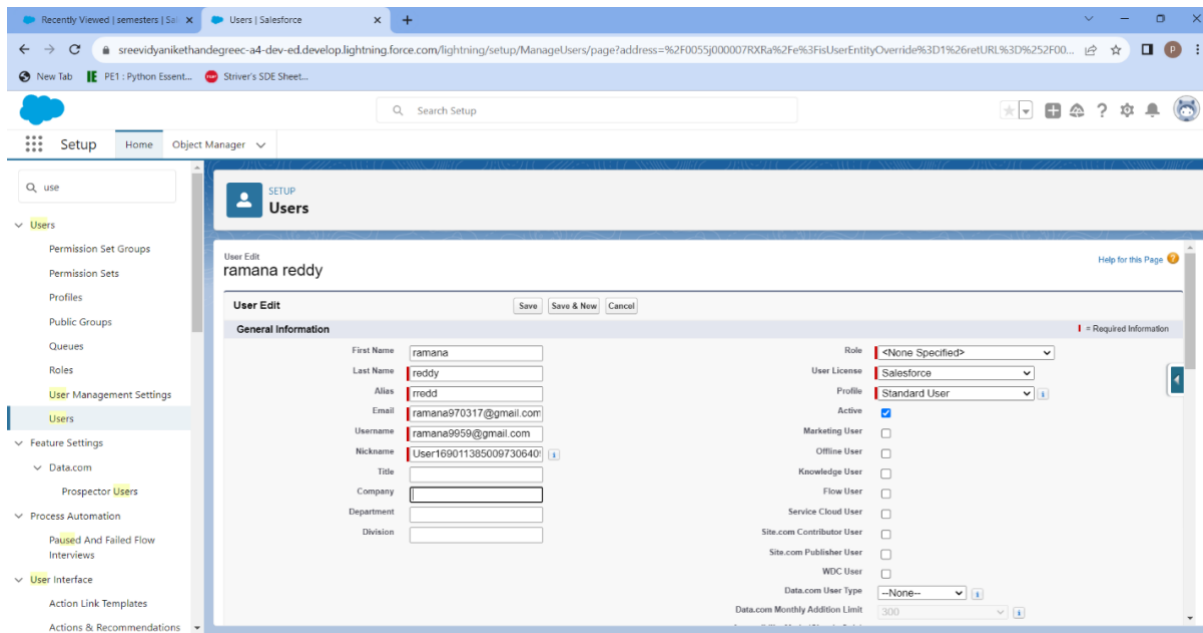
CREATE THE CANDIDATE INTERNAL RESULT CARD APP



App in Salesforce are a group of tabs that help the applications function by adding working together as a unit. We have created lightning app of candidate internal result card.

USERS

CREATING A USERS



Every user in salesforce has a user account. Click setup, enter user in the quick find box, click on users, select a new user, enter user's details and we created a new user.

Result:

Reports

The screenshot shows the Salesforce Reports interface. The report is titled 'Candidate Internal Result Report' and is based on the 'Candidate internal r...' data source. The report displays a table with the following data:

course: Course name	Sum of course: Duration Record Count	BBA	BSc	MIB/C	Total
		6.00	3.00	3.00	12.00
		2	1	1	4
Total	Sum of course: Duration Record Count	6.00	3.00	3.00	12.00
		2	1	1	4

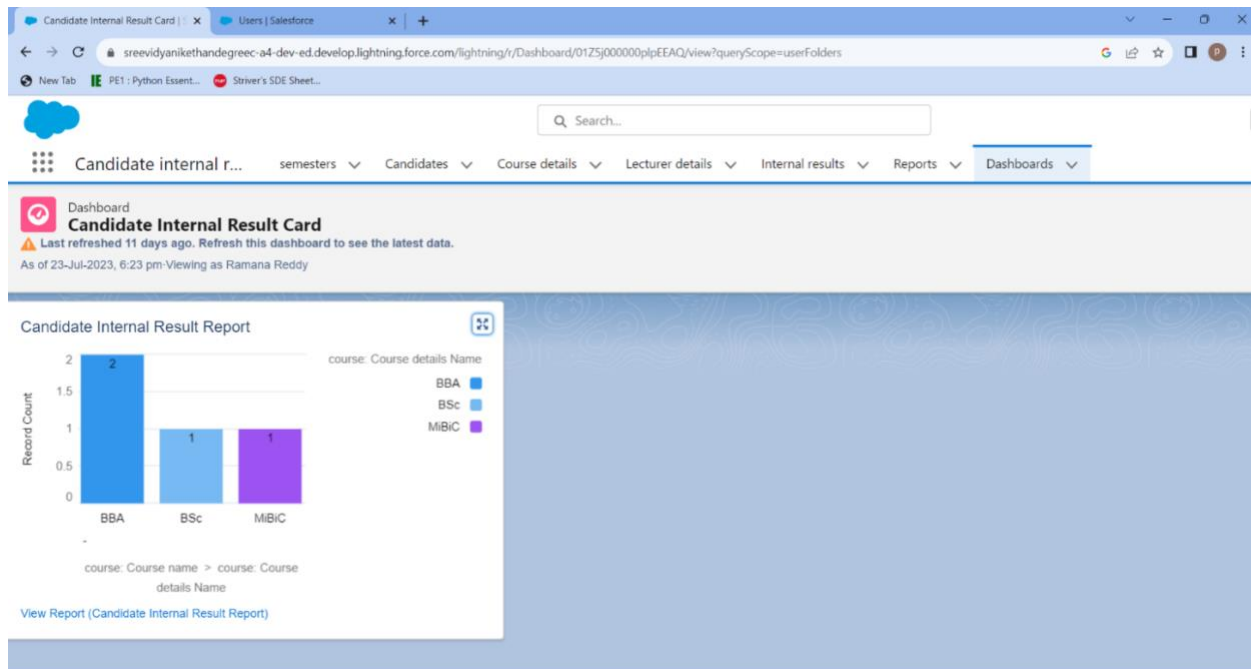
The report also shows a 'Details' section with 4 rows of data:

course: Duration
1
2
3
4
5

A Report is a list of records that meet the criteria you define. Its is displayed in salesforce in the form of rows and columns, and can be

filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder.

DASHBOARDS



Dashboards let you create data from reports using charts, tables, and metrics. Dashboards filters make it easy for users to apply different data perspectives to a single dashboards.

ADVANTAGES

- 1.It helps teachers keep track of student performance and to study their progress throughout the course or degree.
- 2.Implementing CRM in result tracking with internal marks will help you streamline this process.
- 3.CRM systems provide real-time numbers, graphs, and data that may be useful in decision making.
- 4.It also enables us to perform & search by keyword, sign, documentation digitally and send documents digitally.

DISADVANTAGES

1. Customer experience may worsen due to staff over-reliance on the system.
2. Security and data protection issues with centralized data.
3. The excess initial time and productivity cost at the implementation
4. Requires a process-driven sales organization.
5. CRM may not suit all business.

APPLICATIONS

1. Implementing CRM in result tracking can be used in all educational institutions to track candidate results.
2. It can be used both in schools and colleges.
3. In schools, college even in universities, it would be very useful in monitoring students performance and records.

FUTURE SCOPE

OMNICHANNEL DASHBOARDS:-

Deeply integrates with social media, websites, cloud telephony, and other software to bring all queries to a unified dashboards.

AUTOMATIONS:-

AI-powered bots, automated feedback of information form collection, and ,canned responses save time for your staff.

CONCLUSION

Student Internal Marks Management System deals with student details, academic related reports, college details and course details. It tracks all the details of a student from the day one to the end of this course which can be used for all reporting purpose, tracking of progress in the course, completed semester, upcoming semester details, exam details, project or any other assignment details and final exam result.