

Project Report Template

1 Introduction

1.1 Overview 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, Reevaluation Can be initialized by Candidate for all Internal Results. Now only dean can update the marks after re-evaluation.

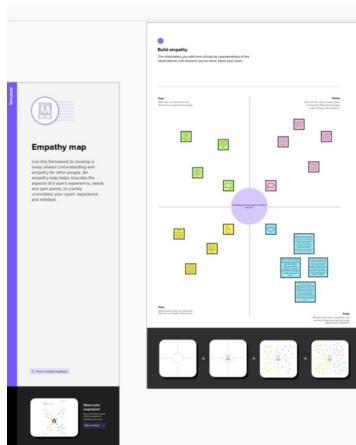
1.2 Purpose

CRM can improve customer retention by 27%, and companies that use CRM systems to the full extent can increase sales by 29%, based on Salesforce studies.

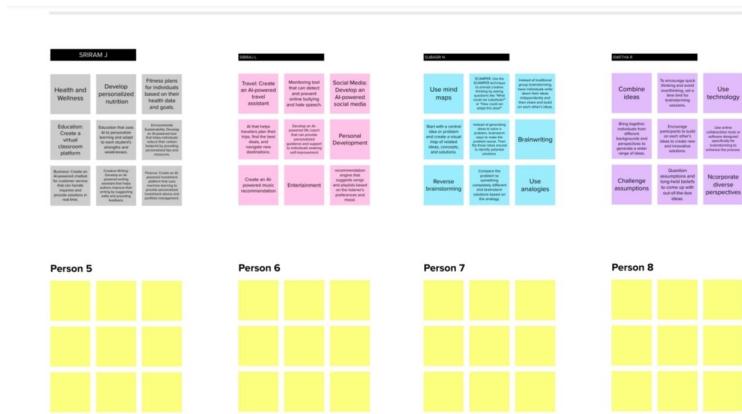
2. Problem Definition & Design

Thinking

1.3 Empathy map



2.2 Ideation brainstorming map



3.1 Data Model

Object name. Fields in the object

Obj1. Field label. Data type

Semester text

Candidate text

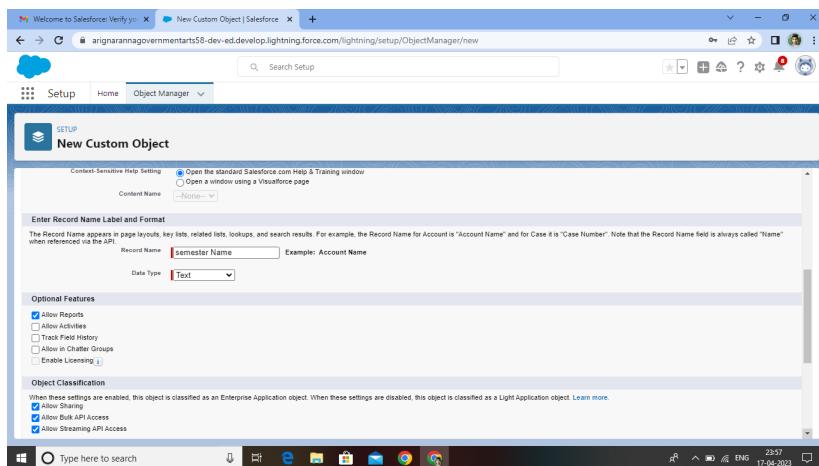
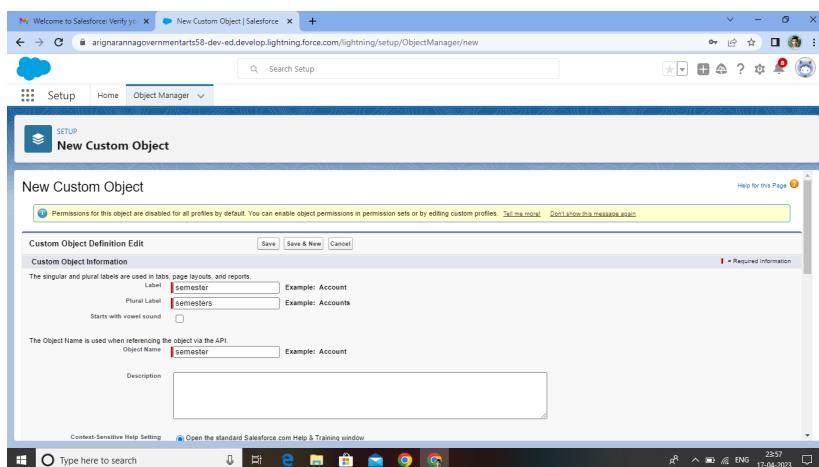
Obj2. Field label. Data type

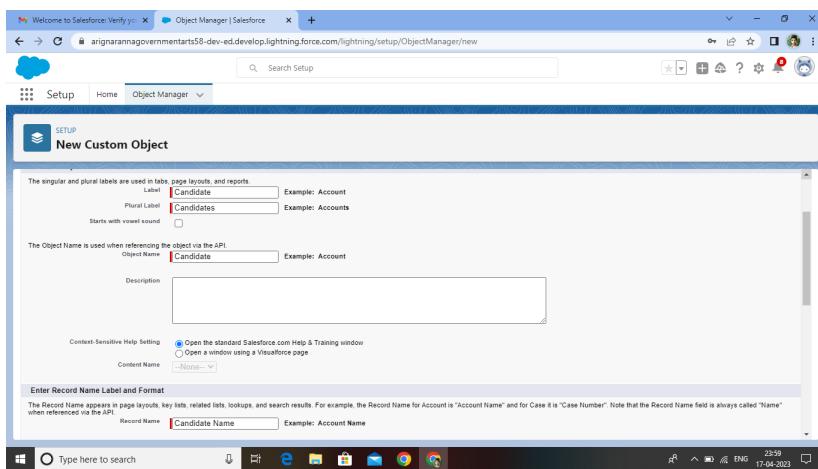
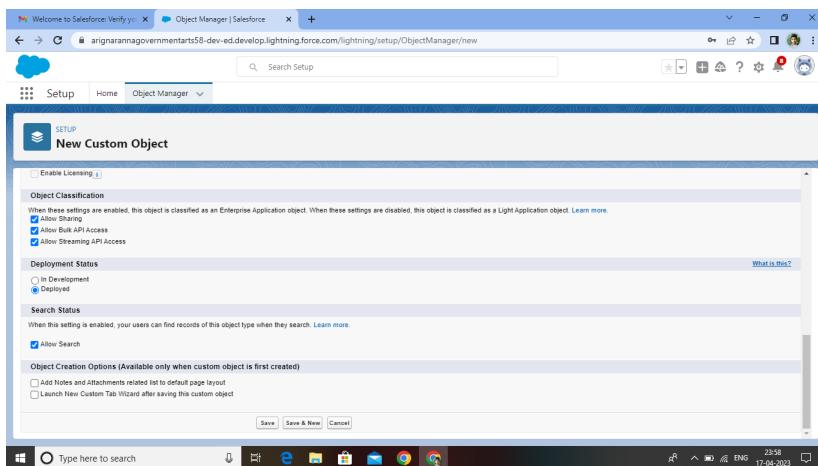
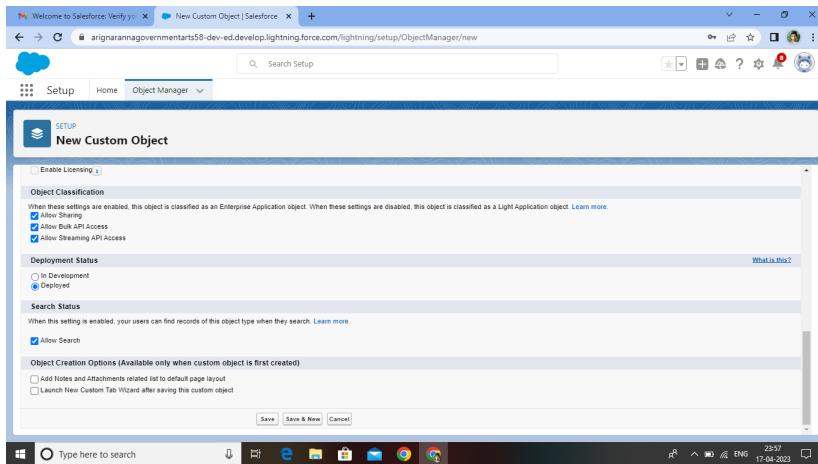
Course details. text

Lecturer details. text

3.2

Activity & Screenshot





Welcome to Salesforce Verify your custom object

Object Manager | Salesforce

arignarannagovernmentarts58-dev-ed-develop.lightning.force.com/lightning/setup/ObjectManager/new

Setup Home Object Manager

New Custom Object

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label: Course details Example: Account

Plural Label: course details Example: Accounts

Starts with vowel sound:

The Object Name is used when referencing the object via the API.

Object Name: Course_details Example: Account

Description:

Help for this Page

Context-Sensitive Help Setting Open the standard Salesforce.com Help & Training window

Type here to search

Welcome to Salesforce Verify your custom object

Object Manager | Salesforce

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Setup Home Object Manager

New Custom Object

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name".

Record Name: Course details Name Example: Account Name

Date Type: Text

Optional Features

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Enable Licensing [Learn more](#)

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#)

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

Deployment Status

In Development [What is this?](#)

Type here to search

Welcome to Salesforce Verify your custom object

Object Manager | Salesforce

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Setup Home Object Manager

New Custom Object

Enable Licensing [Learn more](#)

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- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

Deployment Status

Deployed [What is this?](#)

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

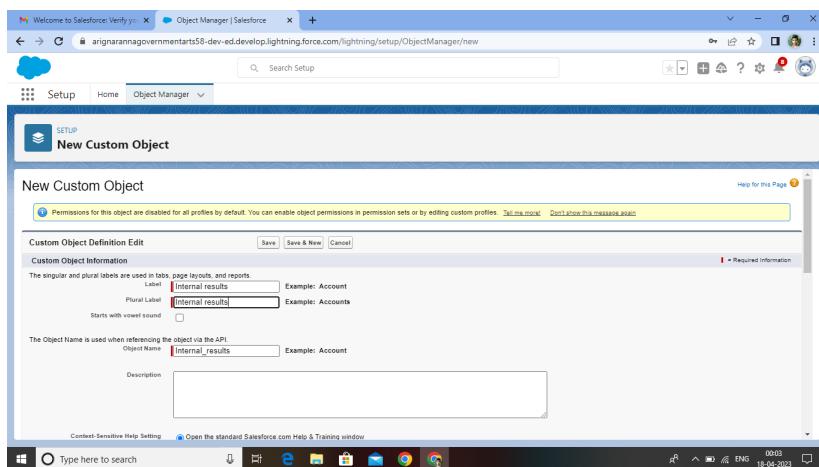
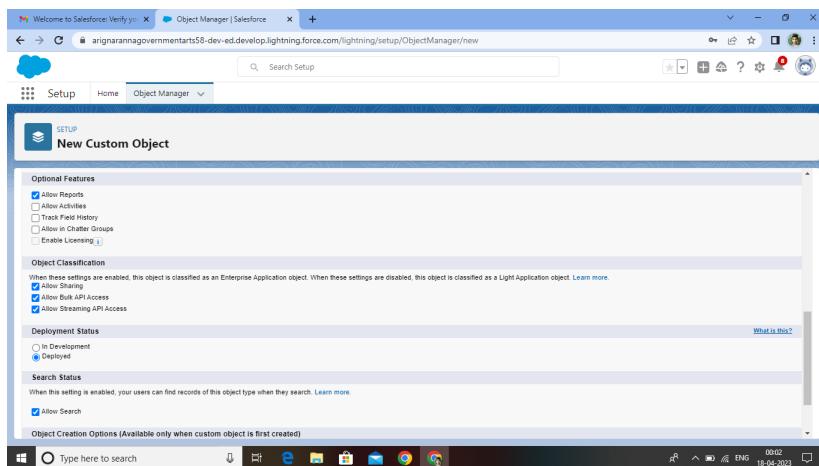
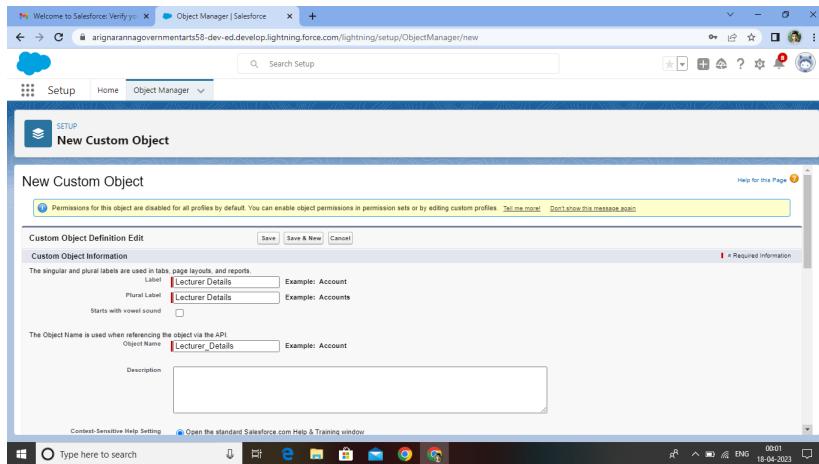
- Allow Search

Object Creation Options (Available only when custom object is first created)

- Add Notes and Attachments related list to default page layout
- Launch New Custom Tab Wizard after saving this custom object

Save Save & New Cancel

Type here to search



New Custom Object

The Object Name is used when referencing the object via the API.
Object Name: Internal_results
 Example: Account

Description:

Context-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window
 Open a window using a Visualforce page

Content Name: -None-

Enter Record Name Label and Format:
 The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name".
Record Name: Internal results Name
 Example: Account Name

Data Type: Text

Optional Features:
 Allow Reports
 Allow Activities
 Track Field History

New Custom Object

Enable Licensing:

Object Classification:
 When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#)
 Allow Sharing
 Allow Bulk API Access
 Allow Streaming API Access

Deployment Status:
 In Development
 Deployed

Search Status:
 When this setting is enabled, your users can find records of this object type when they search. [Learn more](#)
 Allow Search

Object Creation Options (Available only when custom object is first created):
 Add Notes and Attachments related list to default page layout
 Launch New Custom Tab Wizard after saving this custom object

Buttons: Save, Save & New, Cancel

Tabs

New Custom Object Tab

Step 1. Enter the Details Step 1 of 3

Help for this Page [?](#)

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#).
Object: Semester
Tab Style: Books

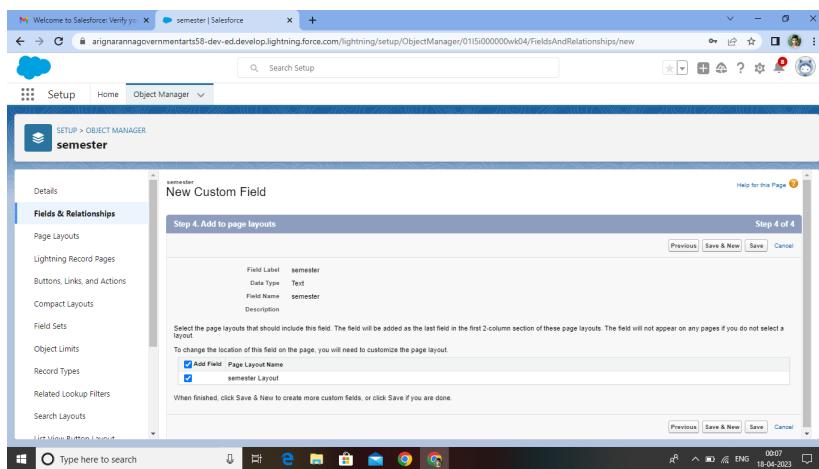
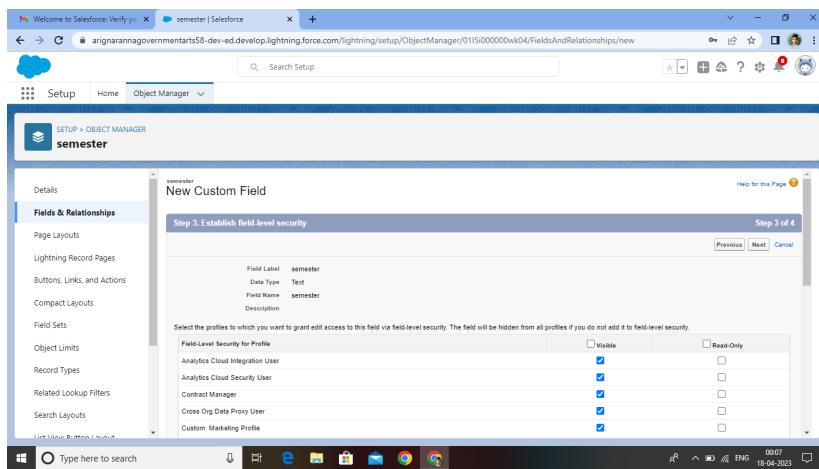
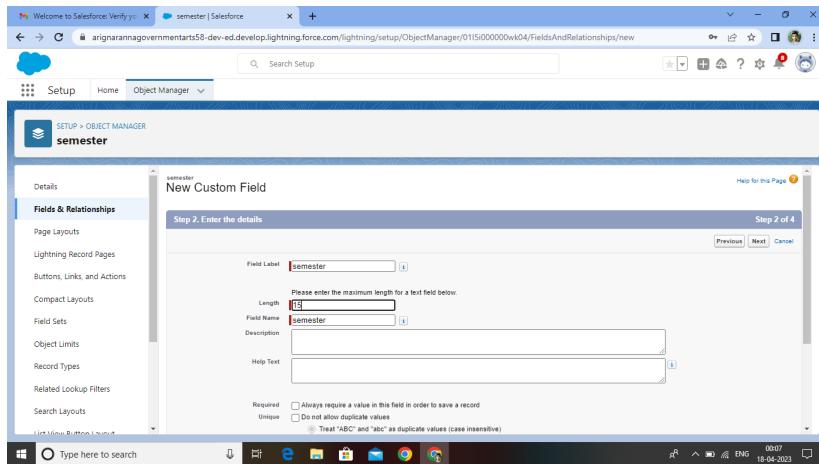
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
 Splash Page Custom Link: -None-

Enter a short description.
Description:

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. On the left, there's a sidebar with navigation links like 'Setup Home', 'Service Setup Assistant', etc. The main area has a title 'SETUP Tabs'. It includes a dropdown 'Apply one tab visibility to all profiles [Default On]' and another 'Apply a different tab visibility for each profile'. Below this is a table titled 'Profile' listing various user profiles with their corresponding 'Tab Visibility' settings, all set to 'Default On'.

This screenshot shows the 'Custom Tabs' configuration page, specifically 'Step 3 of 3'. It's titled 'Add to Custom Apps'. A table lists various standard Salesforce objects (Platform, Sales, Service, Marketing, etc.) with checkboxes for 'Include Tab'. Most checkboxes are checked, indicating they will have a custom tab added.

The screenshot shows the 'Fields & Relationships' configuration page for the 'semester' object. The left sidebar lists fields like 'Email', 'Geolocation', 'Number', 'Percent', 'Phone', 'Picklist', 'Picklist (Multi-Select)', and 'Text'. The 'Text' field is currently selected. The right side provides detailed descriptions for each field type, such as 'Email' allowing users to enter an email address when clicking 'Send an Email'. There are also sections for 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', and 'Search Layouts'.



Welcome to Salesforce Verify your account

Setup > OBJECT MANAGER semester

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 | Text(15) | | |
| semester Name | Name | Text(80) | | |

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

Recent Buttons (1 item)

Type here to search

0008 ENG 18-04-2023

Welcome to Salesforce Verify your account

App Manager | Salesforce

New Lightning App

Add Utility Item

The utility bar is a fixed footer that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.

Utility Bar Alignment: Default

Back Next

Salesforce Data Mobile Apps Apps Communities Lightning Experience

Mobile Apps Salesforce Candidate Internal Result Card

Community LightningBolt

Salesforce CRM Communities

Discover and manage business solutions designed for your industry.

18/04/2023, 9:05 am Lightning

18/04/2023, 9:03 am Classic

Type here to search

0009 ENG 18-04-2023

Welcome to Salesforce Verify your account

App Manager | Salesforce

New Lightning App

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: Candidate Internal Result Card.apx

* Developer Name: Enter a developer name...

Description: Enter a description...

App Branding

Image:

Primary Color Hex Value: #0070D2

Org Theme Options

Next

Salesforce Data Mobile Apps Apps Communities Lightning Experience

Mobile Apps Salesforce Candidate Internal Result Card

Community LightningBolt

Salesforce CRM Communities

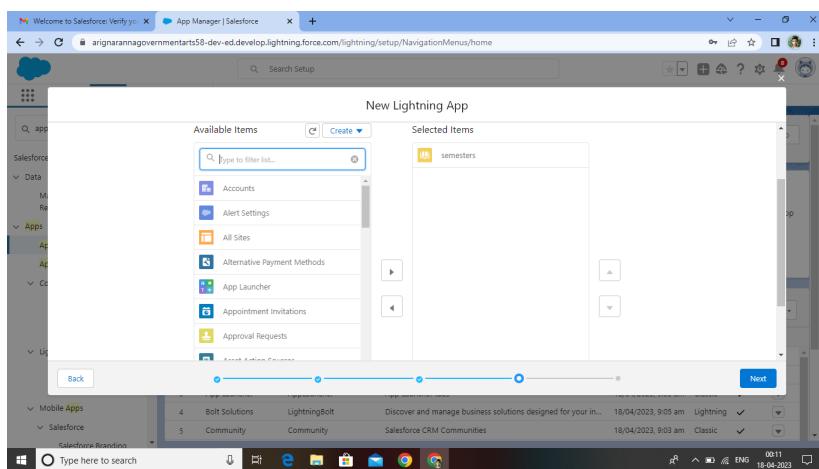
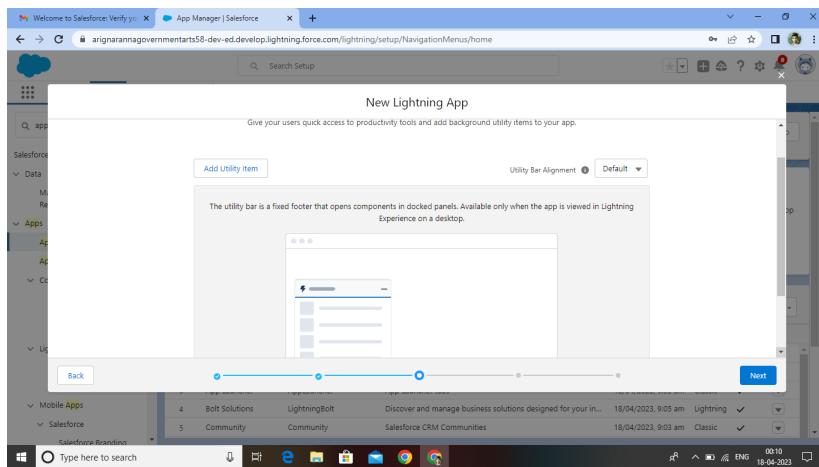
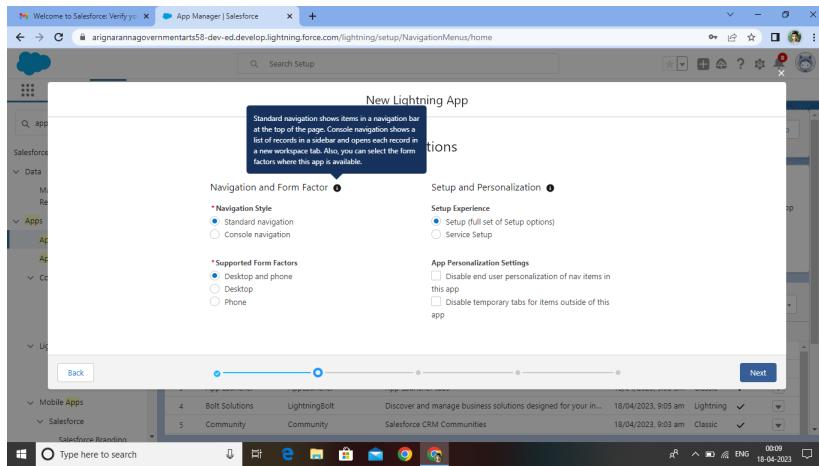
Discover and manage business solutions designed for your industry.

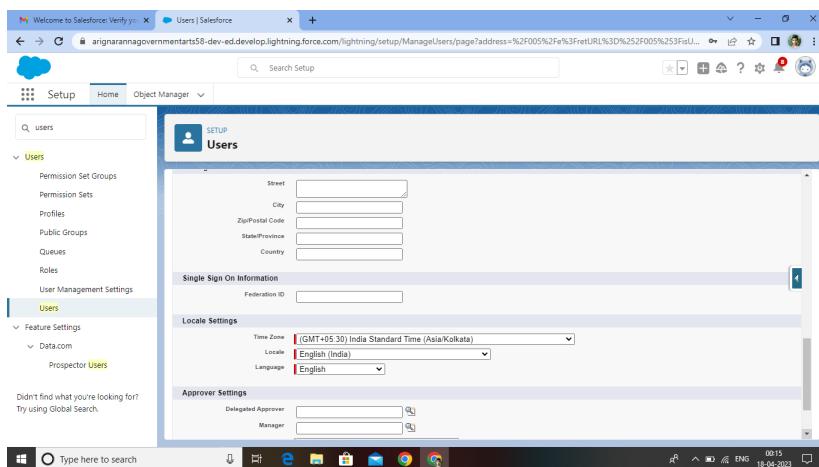
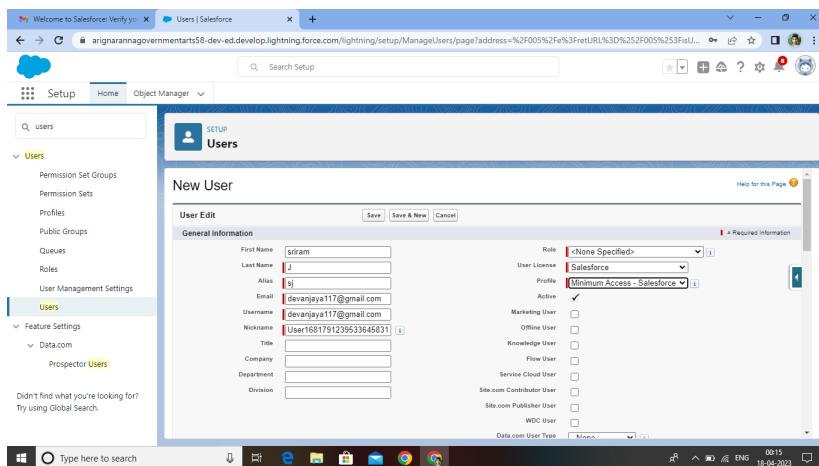
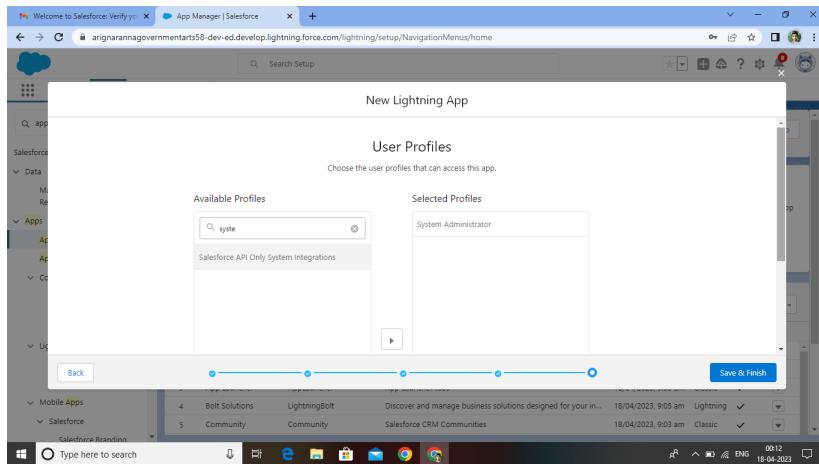
18/04/2023, 9:05 am Lightning

18/04/2023, 9:03 am Classic

Type here to search

0009 ENG 18-04-2023





Welcome to Salesforce Verify

Users | Salesforce

Setup Home Object Manager

Search Setup

User Detail

Name: siriram J

Role: Salesforce - Minimum Access - Salesforce

Active

Marketing User

Offline User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Site.com Publisher User

WDC User

Mobile Push Registrations

Data.com User Type

Delegated Approver

Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)

Locale: English (India)

Language: English

Address:

Division:

Department:

Company:

Title:

Nickname: User16817912395336458313

Alias: J

Email: devanirala117@gmail.com

Username: devanirala117@gmail.com

Delegated Approver

Did you find what you're looking for? Try using Global Search.

Welcome to Salesforce Verify

Report Types | Salesforce

Setup Home Object Manager

Search Setup

Custom Report Types

What is a Custom Report Type?

Custom report types allow you to build a framework in the report wizard, from which users can create and customize reports. You build custom report types off of the relationships (master-detail and lookup) between objects in your callout.

- Choose which objects to display to users creating and customizing reports
- Define the relationships between objects displayed to users creating and customizing reports
- Select which object fields can be used as columns in reports

Note that the visibility of custom report types in the report wizard is controlled by users' access to the objects in the report type.

Don't show me this page again

Continue

https://arignarannagovernmentarts58-dev-ed.lightning.force.com/home

Welcome to Salesforce Verify

Report Types | Salesforce

Setup Home Object Manager

Search Setup

New Custom Report Type

Step 1. Define the Custom Report Type

Report Type Focus

Specify what type of records (rows) will be the focus of reports generated by this report type.
Example: If reporting on "Contacts with Opportunities with Partners," select "Contact" as the primary object.

Primary Object: Candidates

Identification

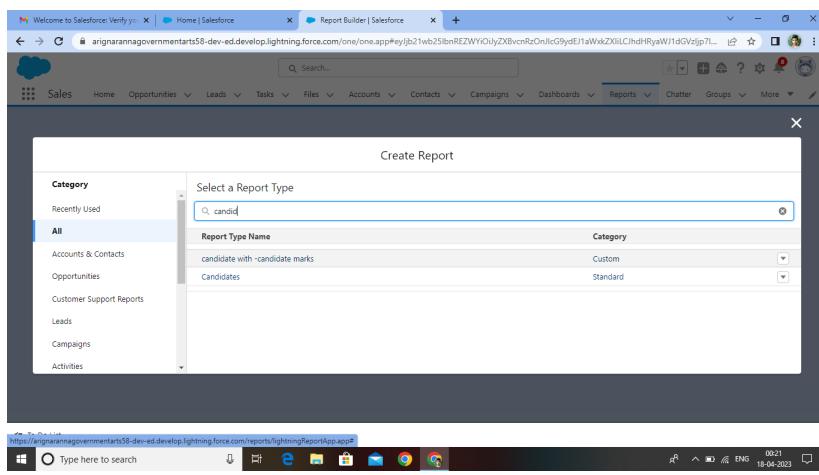
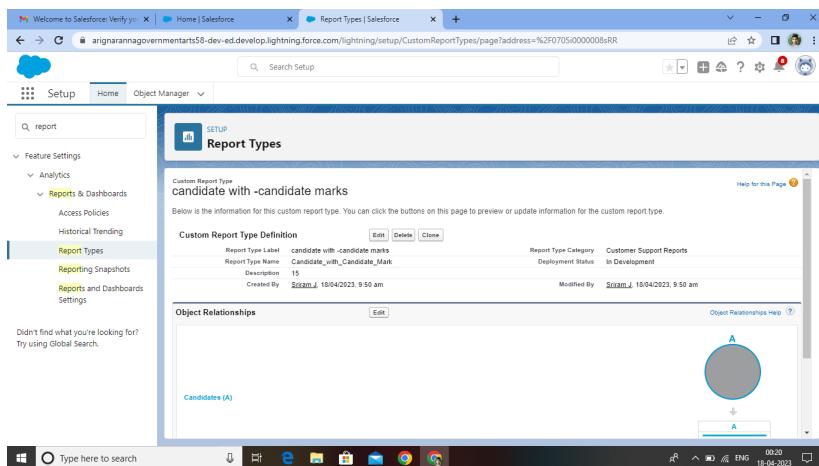
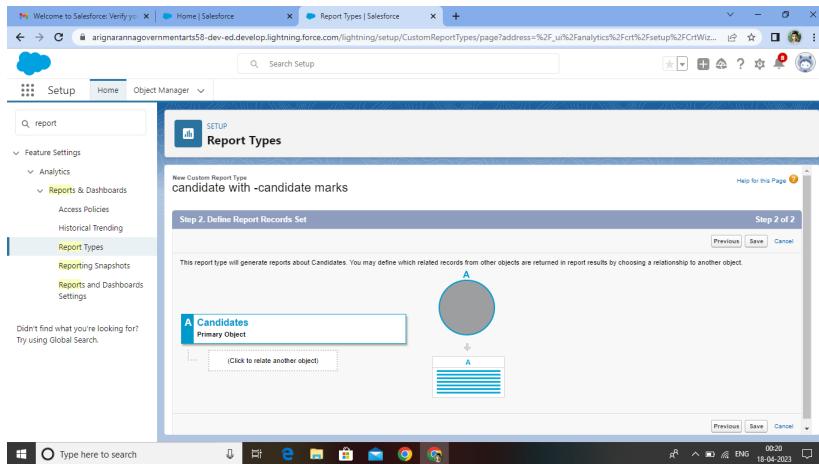
Report Type Label: Candidate with Candidate Mark

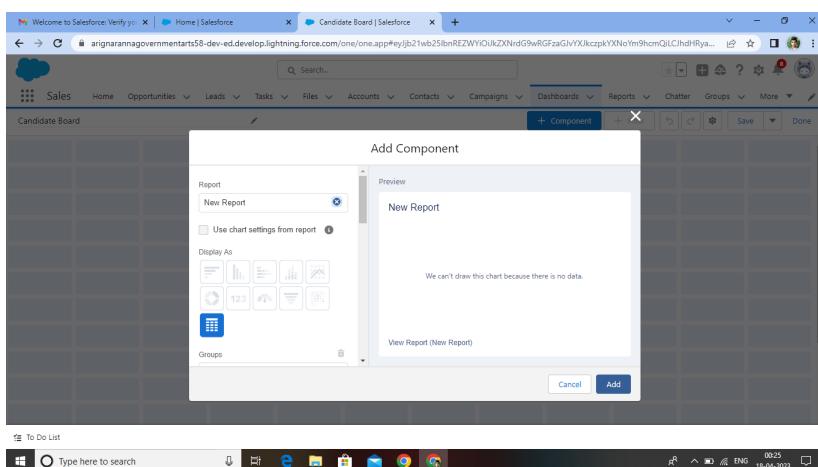
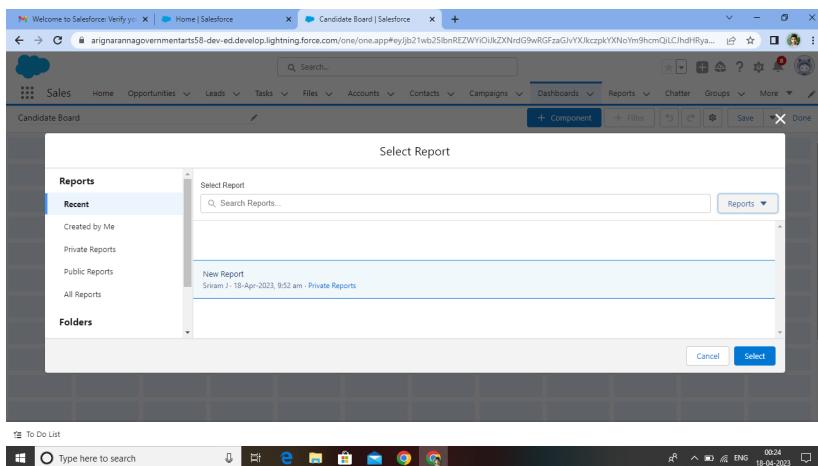
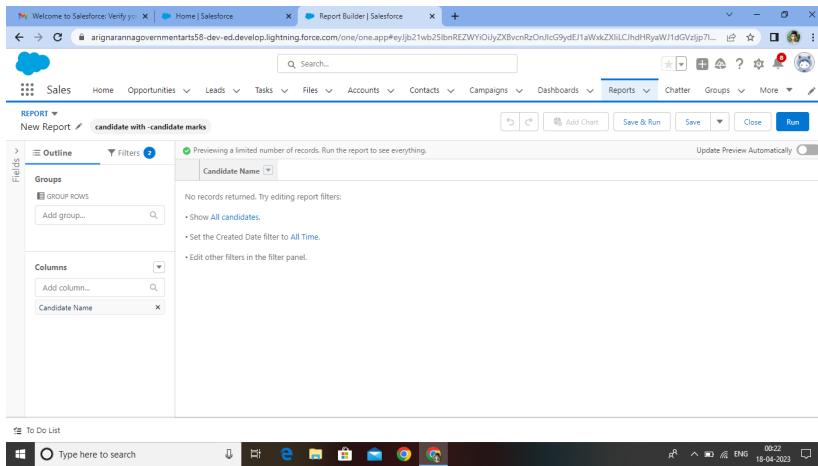
Report Type Name: Candidate_with_Candidate_1

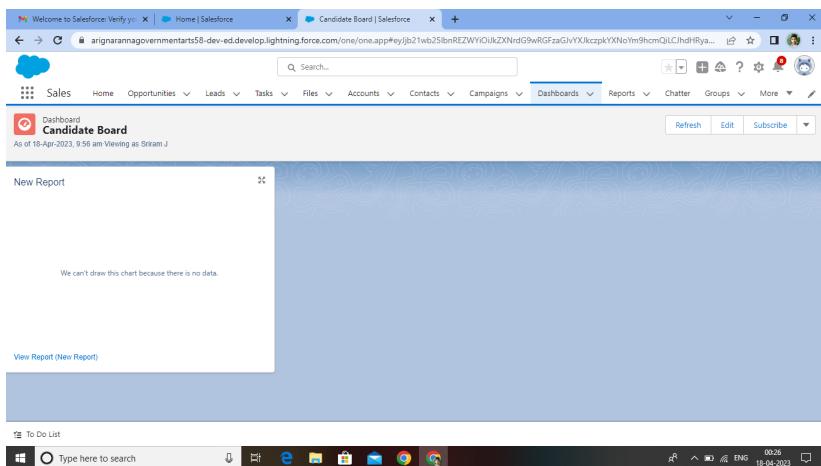
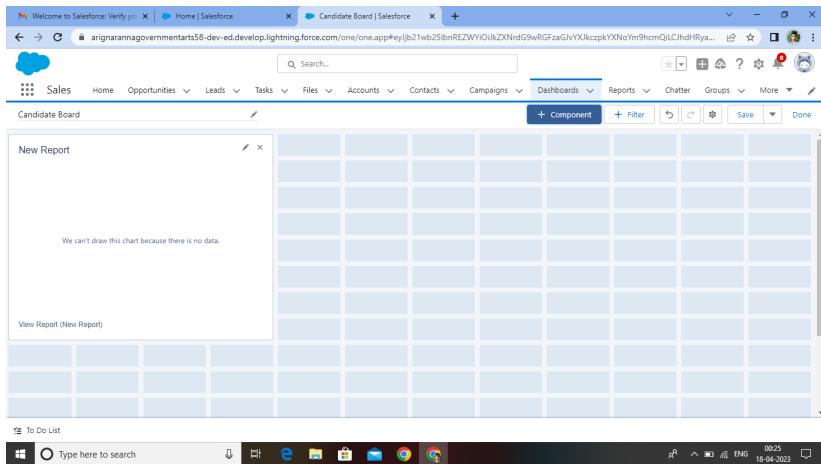
Description: Note: Description will be visible to users who create reports.

Store in Category: Select

Did you find what you're looking for? Try using Global Search.







4. Trailhead profile public URL

Team leader: SRIRAM J

<https://trailblazer.me/id/sriram02>

Team member 1:SUBASRI. N

<https://trailblazer.me/id/subasri2>

Team member 2: SIBIRAJ.L

<https://trailblazer.me/id/sibiraj123>

Teammember 3: SWETHA. R

<https://trailblazer.me/id/swe1234567>

5.Adavantages and disadvantages

Advantages,

- ...Better knowledge of your customers.
- ...Better segmentation.
- ...Better customer retention.
- ...Better anticipation of needs.
- ...Better and smoother communication.

Disadvantages,

CRM costs. One of the greatest challenges to CRM implementation is cost.

Business culture. A lack of commitment or resistance to cultural change from people within the company can cause major difficulties with CRM implementation.

Application

Customer relationship management (CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers. The goal is simple: Improve business relationships. A CRM system helps companies stay connected to customers, streamline processes, and improve profitability.

7. Conclusion

Customer Relationship Management enables a company to align its strategy with the needs of the customer in order to best meet those needs and thus ensure long-term customer loyalty.

8. Future scope

CRM systems might imply automation, but many only offer baseline automation options. The future of CRM will include users who demand more functionality. They'll be looking for providers that cover typical CRM essentials as well as more sophisticated automation.