

PROJECT DOCUMENTATION AND REPORT:

Project title : Implementing CRM For Result

Tracking Of a Candidate With Internal Marks

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IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS

Introduction :

Overview :

The improved features of CRM software have increased both its complexity and necessity. Nearly half of CRM implementation campaigns suffer from improper preparation and misaligned objectives among internal stakeholders. A properly conceived CRM implementation strategy covers the breakdown of its goals, research, strategy, development, and future. This article is for small business owners who want to make sure they are taking the right steps when implementing a new CRM system.

Purpose :

The purpose of the project is to manage the school students result tracking process in the easy way. Students do not need to check the notice board and everyone will stay updated. This is the main purpose of this project. We can work easily and increase candidate quality. This project will also help to those professionals who are in cross-technology and wanted to switch to

salesforce with the help of this project they will gain knowledge and can include into their resume as well.

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.

Theoretical 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 result card



Lightning App – Create the candidate for internal result card app



Fields and relationships – a) Creation of text field on lecturer details and look up field for the candidate object.
b) Creation of auto number field on candidate object, number field on course details object and 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

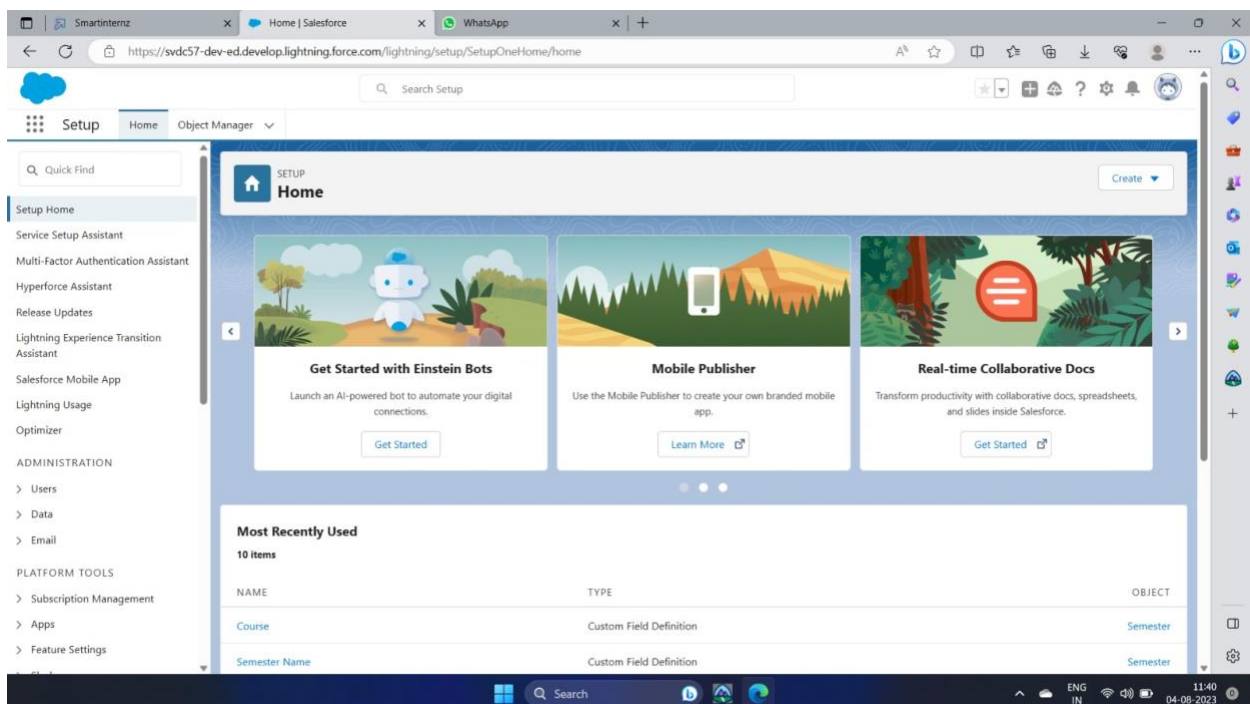
Create a salesforce org – We have created a developer org and activated the account.

Salesforce signup link :

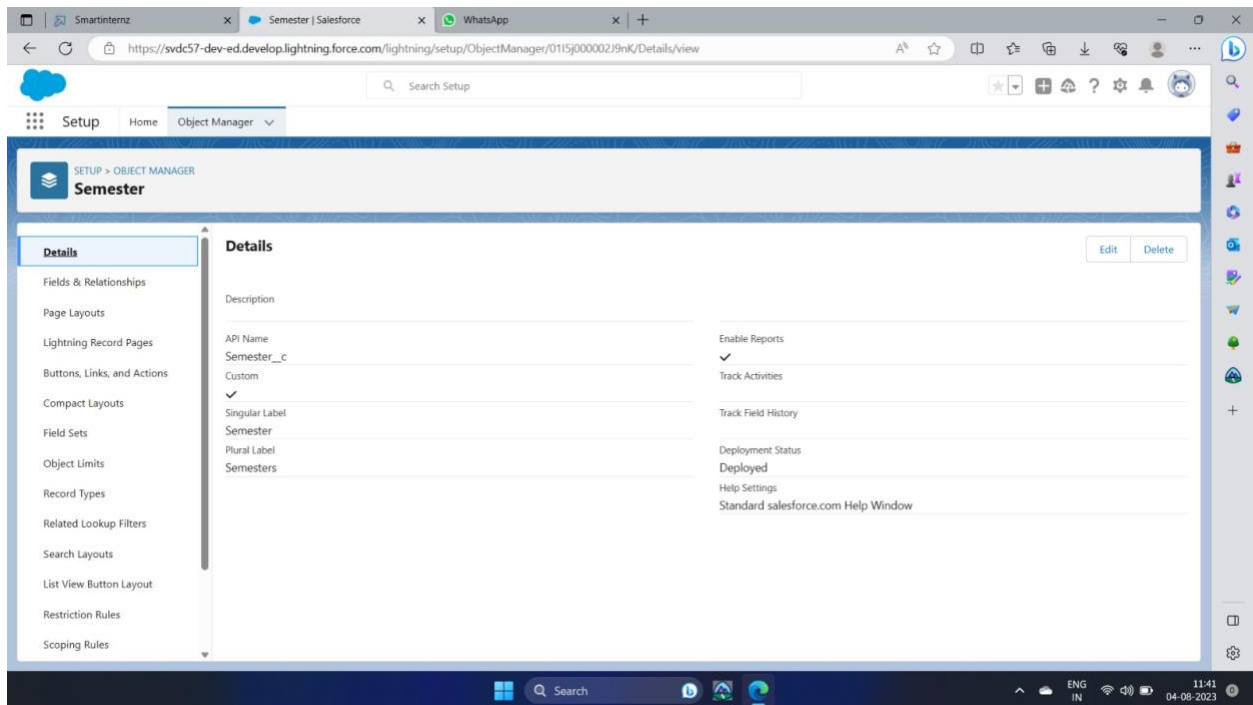
<https://developer.salesforce.com/signup>

Salesforce Login link : <https://login.salesforce.com>

In the below picture we have logged into Salesforce org.



Object – We have created semester, candidate, course details, lecturer details, internal results object for candidate internal result card. In the same way we have created 4 more objects such as candidate, course details, lecturer details and internal results.

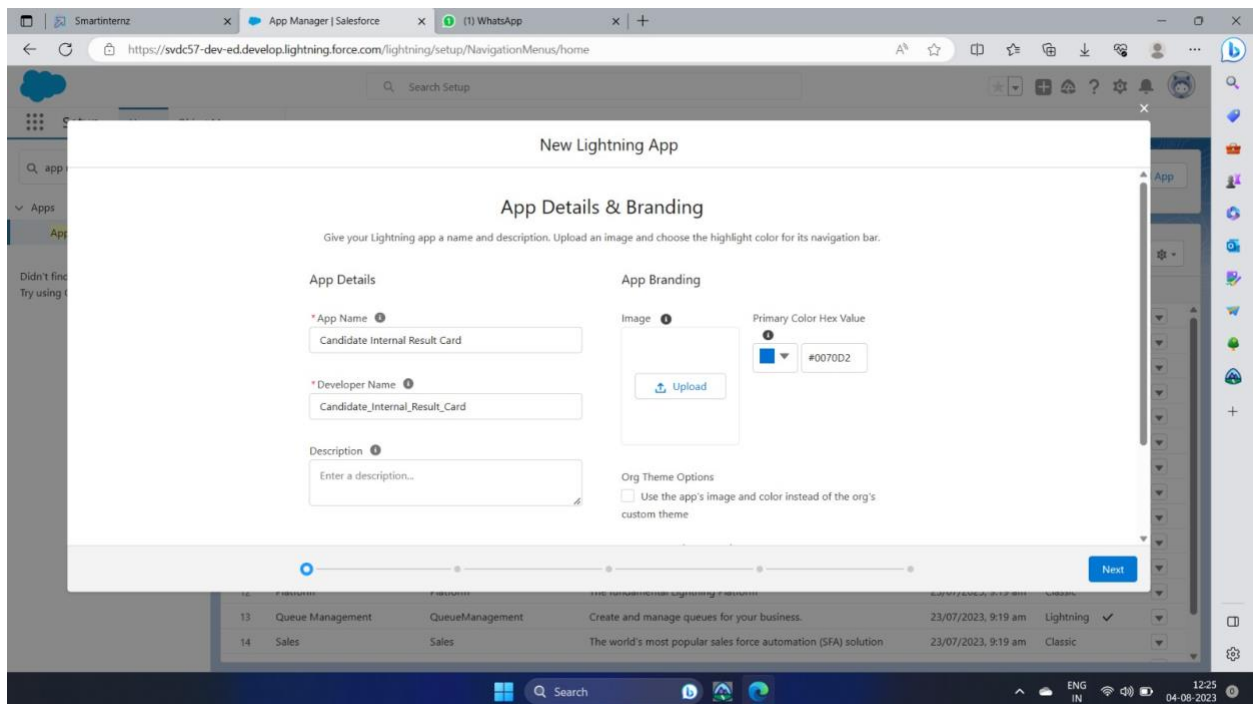


Tab – We have created semester, candidate, course details, lecturer details, internal results tabs for candidate internal result card.

The screenshot shows the Salesforce Setup interface for Custom Tabs. The left sidebar contains the Setup menu with options like Home, Object Manager, and a search bar. The main content area is titled 'Custom Tabs' and includes a 'Help for this Page' link. Below the title, there is a section for 'Custom Object Tabs' with a table listing five tabs: Candidates, Course Details, Internal results, Lecturer Details, and Semesters. Each tab has an 'Action' column with 'Edit' and 'Del' links, a 'Label' column, a 'Tab Style' column with a visual representation, and a 'Description' column. Below this table, there are sections for 'Web Tabs' and 'Visualforce Tabs', both indicating that no tabs have been defined.

Action	Label	Tab Style	Description
Edit Del	Candidates	Box	
Edit Del	Course Details	Camera	
Edit Del	Internal results	Phone	
Edit Del	Lecturer Details	Diamond	
Edit Del	Semesters	Apple	

Lightning App – We have created the candidate internal result card app.



Fields and relationships – We have created text field on lecturer details and lookup field for the candidate object. And created auto number field on candidate object, number field on course details object and formula field course details object. In the similar way we have created all fields on their respective objects.

Smartinternz x Home | Salesforce x WhatsApp x | +

https://apsche.smartinternz.com/Student/guided_project_info/3443#

Smartinternz

Dashboard
Internship
Support
Training Calendar

Guided Project Project Workspace

Candidate With Internal Marks - (ADMIN)

- Create Salesforce Org.
- Object.
- What Is A Tab?
- Lightning App.
- Fields And Relationship.

Creation Of Text Field On "Lecturer Details" & Look Up Field For The "Candidate" Object

Creation Of Auto Number Field On Candidate Object, Number Field On Course Details Object & Formula Field Course Details Object.

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.

Object Name	Field Name	Data type
Semester	Semester Name	Text(Standard field)
	Course	Lookup(Course Details)
Candidate	Candidate Name	Text(Standard field)
	Candidate Roll Number	Auto Number
	Semester Name	Lookup(Semester)
Lecturer Details	Lecturer Name	Text(Standard field)
	Lecturer Role	Text
Course Details	Course Name	Lookup(Course)
	Duration (Years)	Number

Internal results	Candidate	Lookup (candidate)
	Candidate	Formula
	Roll Number	
	Course	Lookup(Course)
	Marks	Number

11:47 04-08-2023

Smartinternz x Semester | Salesforce x WhatsApp x | +

https://svdc57-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j000002j9nK/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
List View Button Layout
Restriction Rules
Scoping Rules

Fields & Relationships
6 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Course	Course_c	Lookup(Course Details)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Semester Name	Semester_Name_c	Lookup(Semester)		✓
Semester Name	Name	Text(80)		✓

12:09 04-08-2023

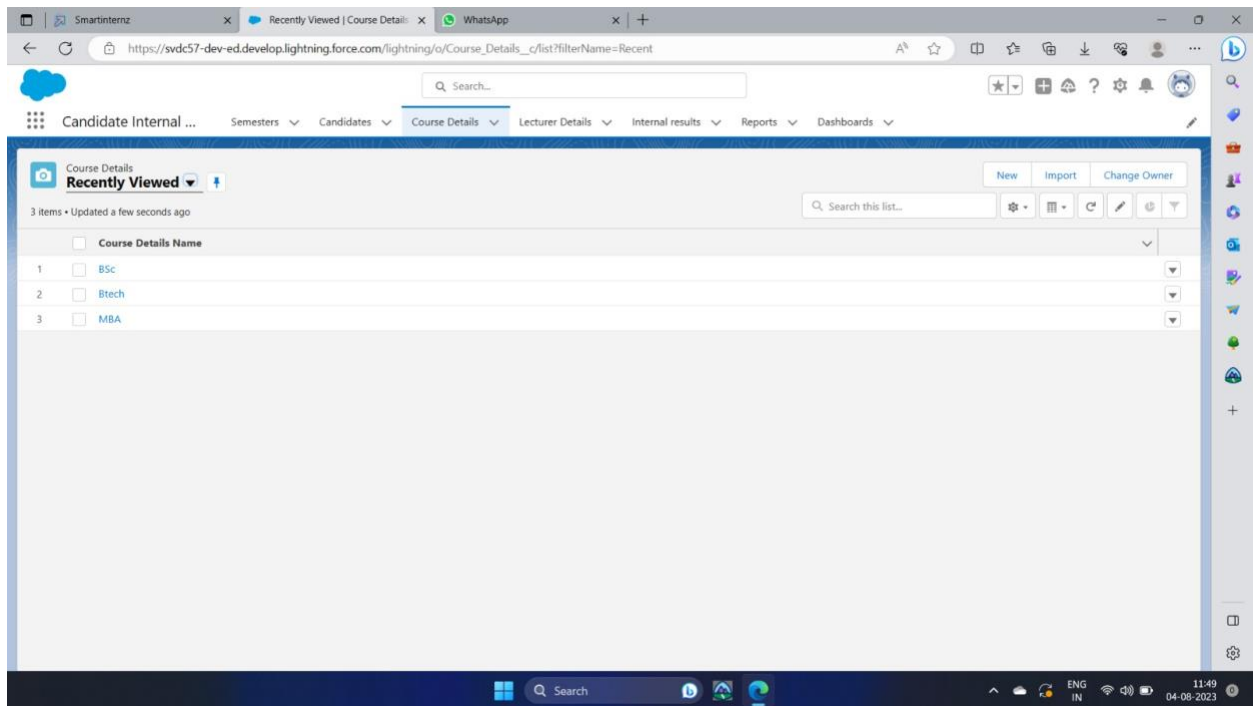
Users – We have created a user named as class teacher.

The screenshot shows the Salesforce Setup interface for a user named 'Class Teacher'. The browser tabs include 'Smartintenz', 'Users | Salesforce', and 'WhatsApp'. The URL is 'https://svdc57-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0055j000008RCIA%3FnoRedirect%3D1%26isUse...'. The left sidebar shows the 'Setup' menu with 'Users' selected. The main content area displays the 'User Detail' for 'Class Teacher'.

User Detail

Field	Value	Field	Value
Name	Class Teacher	Role	Salesforce
Alias	cteac	User License	Standard User
Email	puturvamsi06@gmail.com [verified]	Profile	Standard User
Username	puturvamsi06@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User16900963216572327868	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address	India	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	1
Manager		Accessibility Mode (Classic Only)	1
Receive Approval Request Emails	Only if I am an approver	Debug Mode	1
Federation ID		High Contrast Palette on Charts	1
App Registration: One-Time Password	1	Load Lightning Pages While Scrolling	1

User Adoption – We have created records, viewed records and deleted a particular record in course details.



Reports – We have created and viewed report named as candidate internal result report.

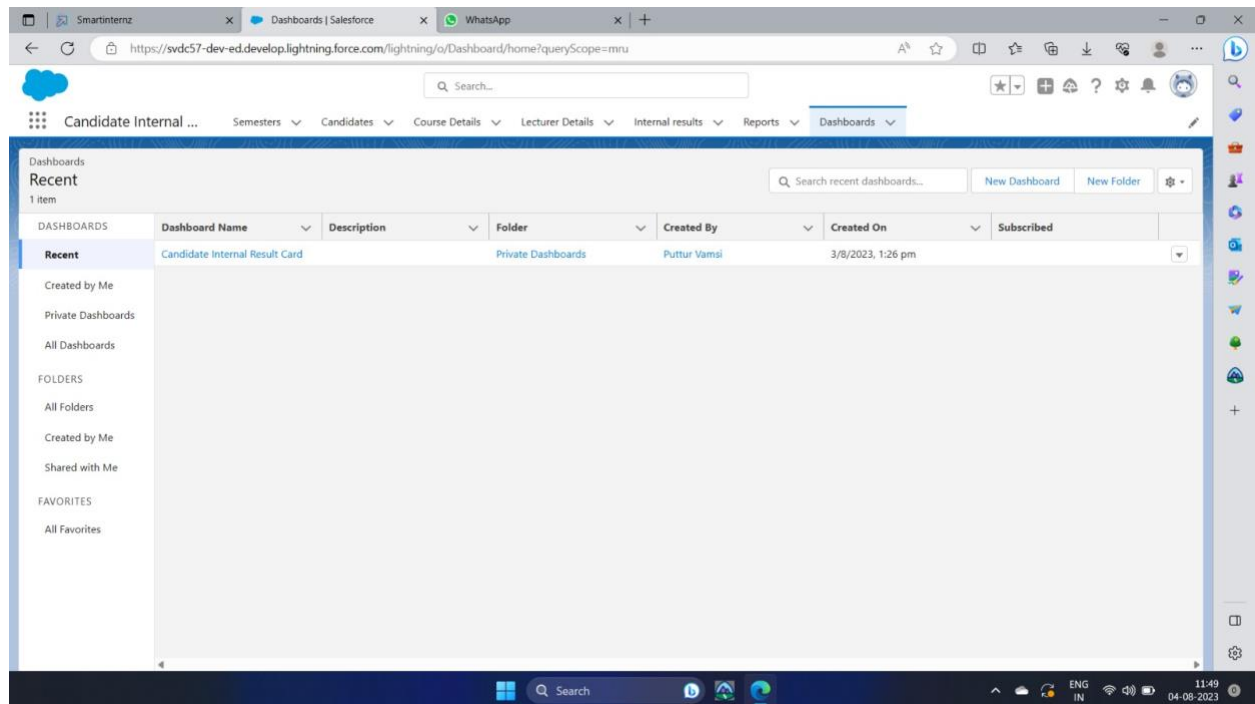
The screenshot displays the Salesforce Reports interface. The browser's address bar shows the URL: `https://svdc57-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mrui`. The page header includes navigation tabs: 'Candidate Internal ...', 'Semesters', 'Candidates', 'Course Details', 'Lecturer Details', 'Internal results', 'Reports', and 'Dashboards'. The 'Reports' tab is active, showing a 'Recent' section with 1 item. A search bar for recent reports and buttons for 'New Report' and 'New Folder' are also present.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Candidate Internal Result Report		Private Reports	Puttur Vamsi	3/8/2023, 1:24 pm	

The left sidebar contains a navigation menu with sections: 'Created by Me' (Private Reports, Public Reports, All Reports), 'FOLDERS' (All Folders, Created by Me, Shared with Me), and 'FAVORITES' (All Favorites).

The bottom of the image shows the Windows taskbar with the search bar, task view icon, and system tray displaying the time as 11:49 and date as 04-08-2023.

Dashboards – We have created and viewed dashboard named as candidate internal result card.



Result :

Reports – We have created and viewed report named as candidate internal result report.

The screenshot shows the Salesforce Reports interface. The browser address bar displays the URL: `https://svdc57-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mrui`. The page title is "Candidate Internal ...". The left sidebar contains navigation links: "Candidate Internal ...", "Semesters", "Candidates", "Course Details", "Lecturer Details", "Internal results", "Reports", and "Dashboards". The main content area shows the "Recent" reports section with a search bar and buttons for "New Report" and "New Folder". A table lists the recent reports:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Candidate Internal Result Report		Private Reports	Puttur Vamsi	3/8/2023, 1:24 pm	

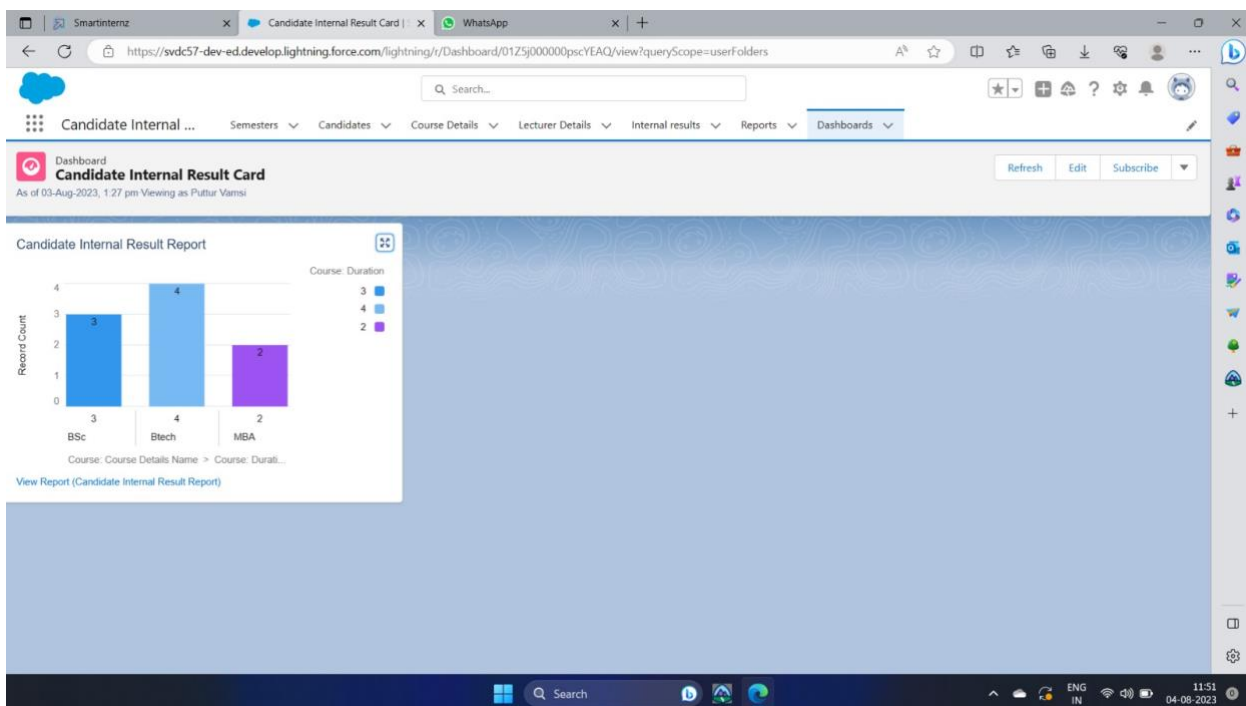
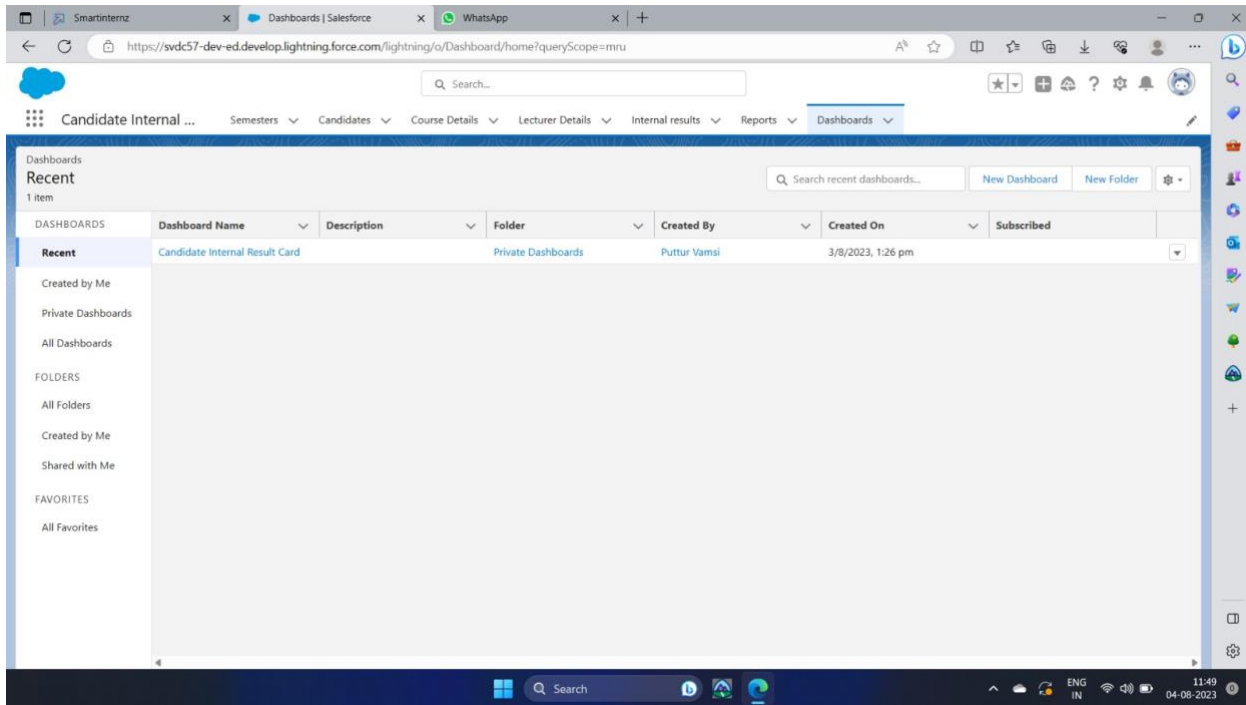
The bottom of the screen shows the Windows taskbar with the search bar and system tray icons.

The screenshot shows the Salesforce Report view for the "Candidate Internal Result Report". The browser address bar displays the URL: `https://svdc57-dev-ed.develop.lightning.force.com/lightning/r/Report/0005j000008lrWeEAK/view?queryScope=userFolders`. The page title is "Candidate Internal ...". The left sidebar contains navigation links: "Candidate Internal ...", "Semesters", "Candidates", "Course Details", "Lecturer Details", "Internal results", "Reports", and "Dashboards". The main content area shows the report details, including a table with the following data:

Course: Course Details Name	Course: Duration	2	3	4	Total
BSc	Record Count	0	3	0	3
Btech	Record Count	0	0	4	4
MBA	Record Count	2	0	0	2
Total	Record Count	2	3	4	9

The bottom of the screen shows the Windows taskbar with the search bar and system tray icons.

Dashboards – We have created and viewed dashboard named as candidate internal result card.



Advantages and Disadvantages :

Advantages :

- It allows for the consolidation of customer data and the basis for deep insights.
- It speeds up the sales conversion process.
- It increases staff productivity, lowering time-cost.
- It allows geographically dispersed teams to collaborate effectively.
- Improves Customer experience by allowing personalization and improved query resolution.

Disadvantages :

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

Applications :

- Target marketing
- Increase candidate quality
- Can work easily

- Streamlining internal sales processes

Conclusion :

Student internal mark 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 his/her 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.

Future scope :

Scope of education means range of view, outlook, field or opportunity of activity, operation and application of education. Education has a wider meaning and application.

