

PROJECT REPORT TEMPLATE

IMPLEMENTING CRM FOR RESULT TRACKING OF A CANDIDATE WITH INTERNAL MARKS

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, re-evaluation can be initialized by candidate for all Internal Results. Now only dean can update the marks after re-evaluation.

1.2 PURPOSE

It saves a lot of time; The purpose of the project is to manage the school student's 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. Can work easily. Increase candidate quality.

[illegible]

2.2. IDEATION AND BRAINSTORMING MAP

The screenshot displays the Mural workspace interface with a structured ideation and brainstorming map. The workspace is divided into five main columns, each with a title and a description:

- Before you collaborate:** A list of ideation goals and a list of questions to ask the team.
- Define your problem statement:** A section for defining the problem statement, including a list of questions to ask the team.
- Brainstorm:** A section for brainstorming ideas, including a list of questions to ask the team.
- Group ideas:** A section for grouping ideas, including a list of questions to ask the team.
- Prioritize:** A section for prioritizing ideas, including a list of questions to ask the team.

The map includes several sticky notes and diagrams. A large diagram on the right side shows a funnel-like structure with the following steps:

- Define a standard CRM management Process
- Identify the CRM system and its role in the organization
- Identify the CRM system and its role in the organization
- Identify the CRM system and its role in the organization

The workspace also features a toolbar on the left with various drawing tools and a bottom toolbar with a zoom slider set to 14%.

3.RESULT:

3.1. DATA MODE:

OBJECT NAME	FIELDS IN THE OBJECT	
<i>CUSTOM OBJECT 1</i>	<i>Field label</i>	<i>Data type</i>
	<i>1.Semester</i>	<i>Numbers</i>
	<i>2.Candidate Name</i>	<i>Latters</i>
<i>CUSTOM OBJECT 2</i>	<i>Field label</i>	<i>Data type</i>
	<i>3.Coures Details</i>	<i>List</i>
	<i>4.Lecturer Details</i>	<i>Reading</i>
	<i>5.Internal Results</i>	<i>Numbers</i>

DESCRIPTION

Activity-1:

To Create an object:

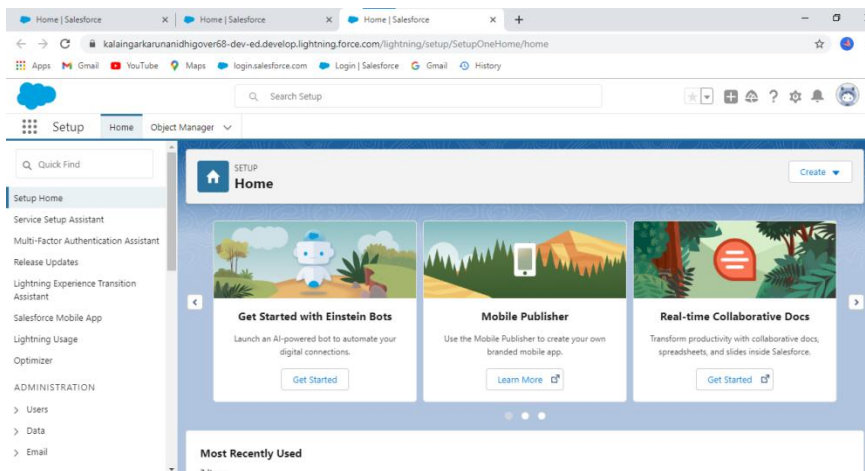
From the setup page , click on object manager ,click on create ,click on custom object.Enter name and save.This launches setup in new tap.Fields &

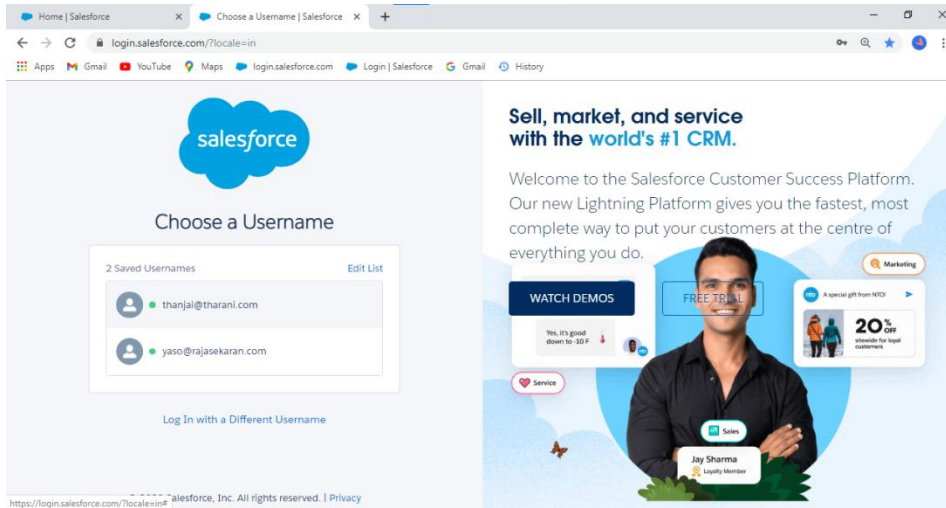
Relationship and click new.data type then click next,next ,next,then save.Enter app manager ,new lightning app ,app name then next.Click save & finish.To add user profiles.Creating a users and new user ,check generate new password and notife the user immediately to have the users login name and a temporary password emailed to email.click the new dashboard and + component for reports select candidate mark by stage. As select vertical bar charts and click add and click save and click done.

3.2. ACTIVITY & SCREENSHOT:

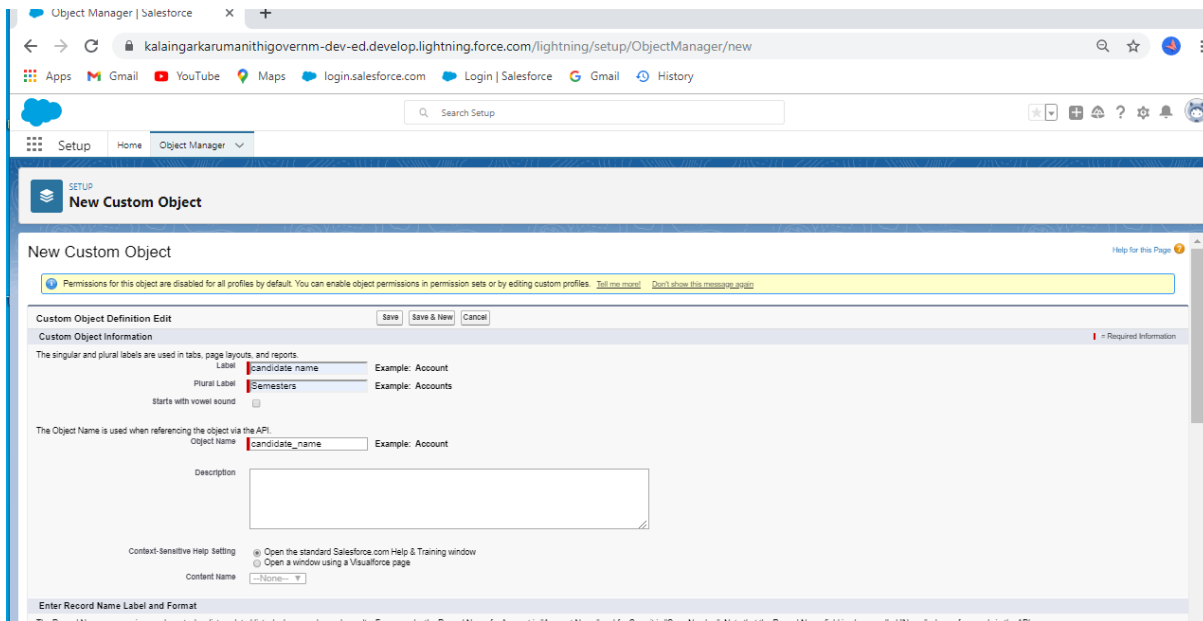
1.Creation salesforce org.

Login to your salesforce account





Milestone:Object



Object Manager | Salesforce

← → ↻ [kalaingarkarumanithigovernm-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new](#) 🔍 ☆ 🌐

Apps Gmail YouTube Maps login.salesforce.com Login | Salesforce Gmail History

🔍 Search Setup

Setup Home Object Manager

SETUP

New Custom Object

New Custom Object Help for this Page

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

Custom Object Definition Edit Save Save & New! Cancel

Custom Object Information Required Information

The singular and plural labels are used in tabs, page layouts, and reports.
Label Example: Account
Plural Label Example: Accounts
starts with vowel sound ☐

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

Context-Sensitive Help Setting
☒ Open the standard Salesforce.com Help & Training window
☐ Open a window using a Visualforce page
Content Name

Enter Record Name Label and Format

Object Manager | Salesforce

← → ↻ [kalaingarkarumanithigovernm-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new](#) 🔍 ☆ 🌐

Apps Gmail YouTube Maps login.salesforce.com Login | Salesforce Gmail History

🔍 Search Setup

Setup Home Object Manager

SETUP

New Custom Object

New Custom Object Help for this Page

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

Custom Object Definition Edit Save Save & New! Cancel

Custom Object Information Required Information

The singular and plural labels are used in tabs, page layouts, and reports.
Label Example: Account
Plural Label Example: Accounts
starts with vowel sound ☐

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

Context-Sensitive Help Setting
☒ Open the standard Salesforce.com Help & Training window
☐ Open a window using a Visualforce page
Content Name

Enter Record Name Label and Format

internal result | Salesforce

kalaingarkarumanithigovernm-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000048bx5/FieldsAndRelationships/new

Setup Home Object Manager

internal result

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

internal result

New Custom Field

Step 2. Enter the details

Field Label internal result

Length 10

Field Name internal_result

Description

Help Text

Required ☐ Always require a value in this field in order to save a record

Unique ☐ Do not allow duplicate values

☒ Treat "ABC" and "abc" as duplicate values (case insensitive)

☐ Treat "ABC" and "abc" as different values (case sensitive)

External ID ☐ Set this field as the unique record identifier from an external system

☒ Add this field to existing custom report types that contain this entity

internal result | Salesforce candidate name | Salesforce

kalaingarkarumanithigovernm-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000048bwb/FieldsAndRelationships/new

Setup Home Object Manager

candidate name

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

candidate name

New Custom Field

Step 2. Enter the details

Field Label lecturer detail

Length 10

Field Name lecturer_detail

Description

Help Text

Required ☐ Always require a value in this field in order to save a record

Unique ☐ Do not allow duplicate values

☒ Treat "ABC" and "abc" as duplicate values (case insensitive)

☐ Treat "ABC" and "abc" as different values (case sensitive)

External ID ☐ Set this field as the unique record identifier from an external system

☒ Add this field to existing custom report types that contain this entity

internal result | Salesforce x candidate name | Salesforce x

kalaingarkarumanithigovernm-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000048bwb/FieldsAndRelationships/new

Apps Gmail YouTube Maps login.salesforce.com Login | Salesforce Gmail History

Setup Home Object Manager

SETUP > OBJECT MANAGER
candidate name

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

candidate name
New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label: (1)

Please enter the maximum length for a text field below.

Length:

Field Name: (1)

Description:

Help Text:

Required: ☐ Always require a value in this field in order to save a record

Unique: ☐ Do not allow duplicate values

☐ Treat "ABC" and "abc" as duplicate values (case insensitive)

☐ Treat "ABC" and "abc" as different values (case sensitive)

External ID: ☐ Set this field as the unique record identifier from an external system

Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity (1)

Milestone-2:Field and Relationship

internal result | Salesforce x Tabs | Salesforce x

kalaingarkarumanithigovernm-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.js...

Apps Gmail YouTube Maps login.salesforce.com Login | Salesforce Gmail History

Setup Home Object Manager

Quick Find

Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
Subscription Management
Apps
Feature Settings
Slack
MobileOnly

SETUP
Tabs

New Custom Object Tab

Step 1. Enter the Details Step 1 of 3

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:

Tab Style:

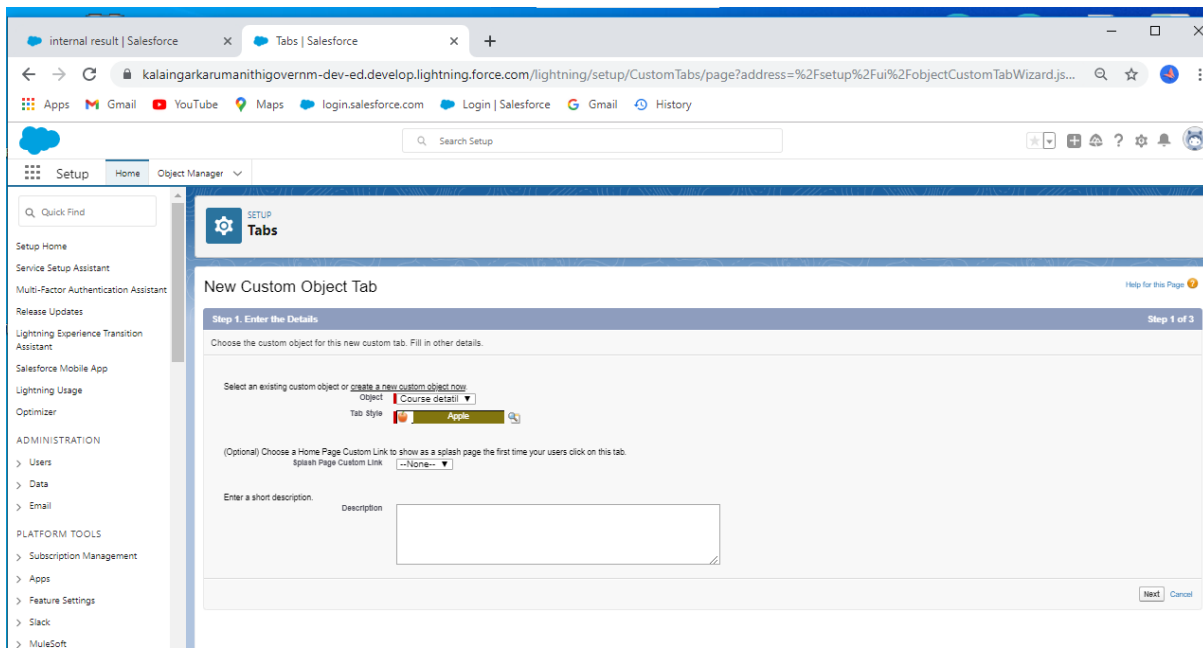
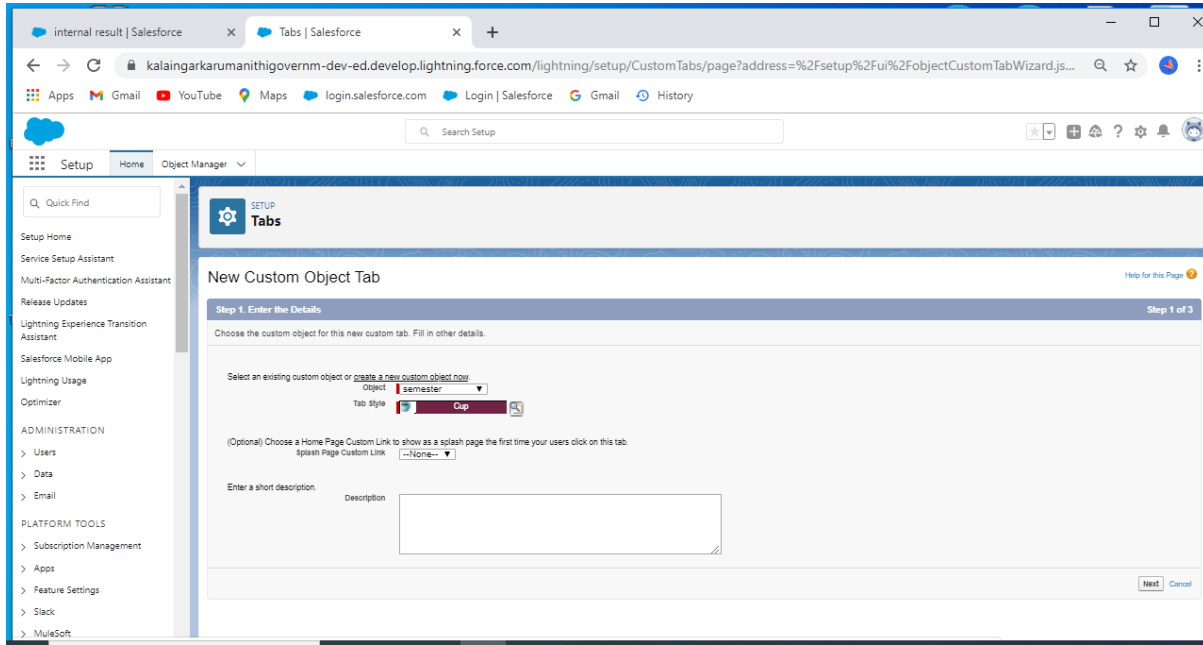
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

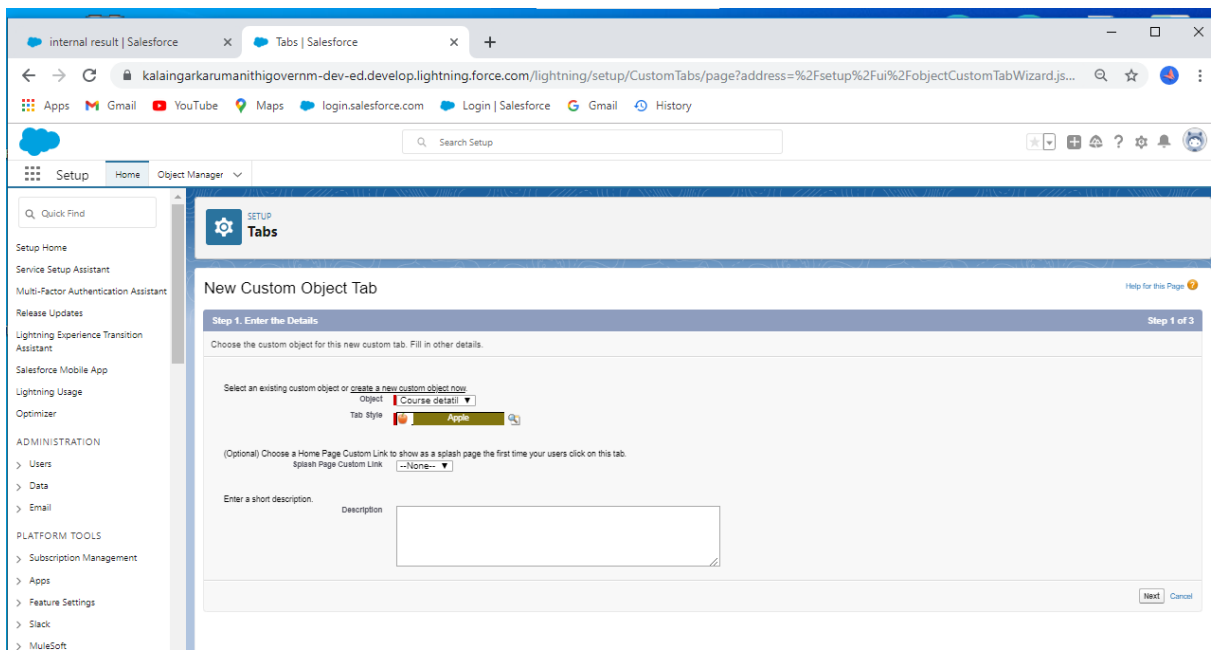
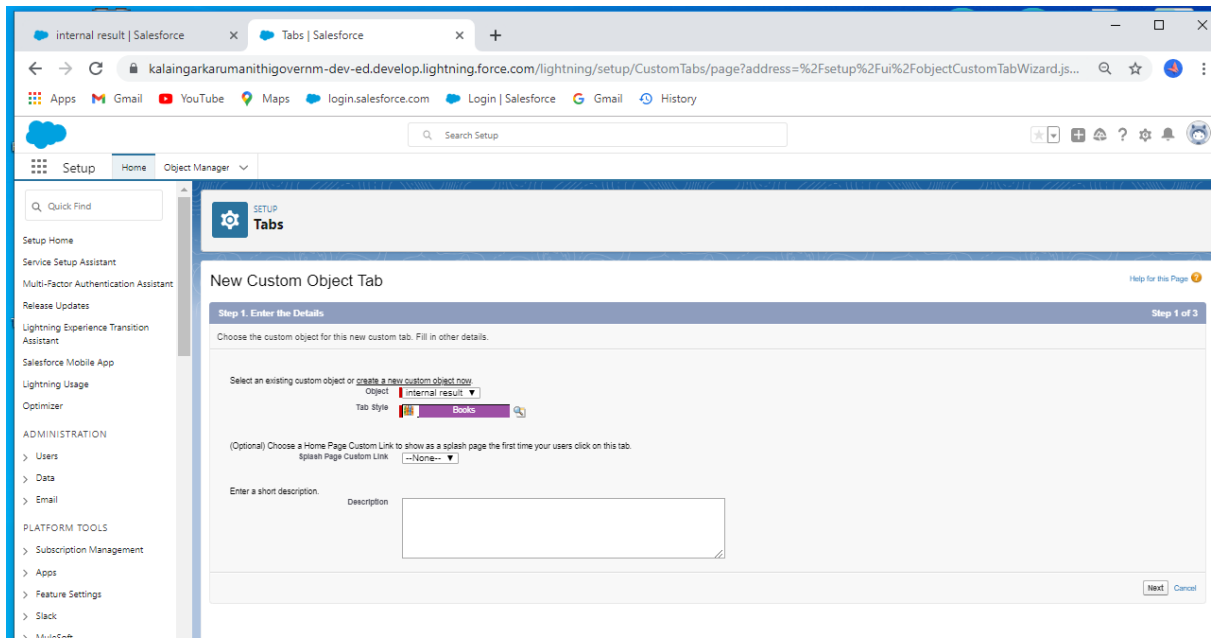
Splash Page Custom Link:

Enter a short description.

Description:

Next Cancel





Milestone-3: Lightning App

The screenshot shows the Salesforce Lightning Experience App Manager interface. The browser address bar displays the URL: `kalaingarkarumanithigovernm-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home`. The left sidebar contains the 'Setup' menu with 'Home' and 'Object Manager' options. The main content area is titled 'Lightning Experience App Manager' and includes a 'Clone Apps(Beta)' section with a toggle for 'Enable App Cloning' (currently disabled). Below this is a table listing 23 items, sorted by App Name, filtered by All app menu items - TabSet Type.

App Name	Developer Name	Description	Last Modified Date	App Type	Visible i...
1 All Tabs	AllTabSet		24/02/2023, 1:40 pm	Classic	
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	24/02/2023, 1:40 pm	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	24/02/2023, 1:40 pm	Classic	✓
4 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	24/02/2023, 1:42 pm	Lightning	✓
5 Community	Community	Salesforce CRM Communities	24/02/2023, 1:40 pm	Classic	✓
6 Content	Content	Salesforce CRM Content	24/02/2023, 1:40 pm	Classic	✓
7 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	24/02/2023, 1:40 pm	Lightning	✓
8 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	24/02/2023, 1:40 pm	Lightning	✓

The screenshot shows the 'New Lightning App' dialog box in Salesforce. The dialog has two main sections: 'Available Items' and 'Selected Items'. The 'Available Items' section contains a search bar with the text 'ist' and a list of items: Appointment Invitations, Contact Point Consent, Contact Point Type Consent, and Service Appointments. The 'Selected Items' section contains a list of items: lecturer details, course details, semesters, and internal results. At the bottom of the dialog, there are 'Back' and 'Next' buttons, and a progress bar indicating the current step in the process.

Milestone-4: Users.

The screenshot shows the Salesforce Setup interface. The left sidebar contains a navigation menu with 'Users' highlighted. The main content area is titled 'New User' and contains a 'User Edit' form. The form has a red error message at the top: 'Error: Invalid Data. Review all error messages below to correct your data.' The form fields are organized into two columns. The left column includes 'First Name' (Yasodha), 'Last Name' (R), 'Alias' (yr), 'Email' (yasodharajasekaranr@gmail.com), 'Username' (yasodharajasekaranr@gmail.com), 'Nickname' (User1681969349754256371), 'Title', and 'Company'. The right column includes 'Role' (<None Specified>), 'User License' (Salesforce), 'Profile' (Custom: Sales Profile), 'Active' (checked), 'Marketing User' (unchecked), 'Offline User' (unchecked), 'Knowledge User' (unchecked), and 'Flow User' (unchecked). A red box highlights the 'Profile' field with the error message 'Error: You must enter a value'.

Milestone-5: Reports.

The screenshot shows the Salesforce Report Builder interface. The left sidebar contains a navigation menu with 'Reports' highlighted. The main content area is titled 'Create Report' and contains a 'Select a Report Type' section. The 'Recently Used Report Types' table shows the following data:

Report Type Name	Category
Accounts	Standard

The 'Details' panel on the right shows the 'Accounts' report type selected. It includes a 'Start Report' button, a 'Details' tab, and a 'Fields (63)' list. The 'Created By You' section shows 'New Accounts Report' last used on 4/18/2023. The 'Created By Others' section shows 'No Reports Yet'. The 'Objects Used in Report Type' section shows a list of objects.

Milestone-6:Dashboards:

The screenshot shows a Salesforce dashboard titled "Result Tracking of the candidate". The dashboard includes a sidebar with navigation links: Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, People, Cases, Forecasts, and More. The main content area displays a "New Accounts Report" table with columns: Last Activity, Account Owner, Account Name, Billing State/Province, and Type. The table lists several accounts, including "Sample Account for Entitlements", "GenePoint", "United Oil & Gas, UK", "United Oil & Gas, Singapore", "Edge Communications", and "Burlington Textiles Corp of America". A "View Report (New Accounts Report)" button is visible at the bottom of the table.

Last Activity	Account Owner	Account Name	Billing State/Province	Type
-	Automated Process	Sample Account for Entitlements	-	-
-	Yasodha R	GenePoint	CA	Customer - Channel
-	Yasodha R	United Oil & Gas, UK	UK	Customer - Direct
-	Yasodha R	United Oil & Gas, Singapore	Singapore	Customer - Direct
-	Yasodha R	Edge Communications	TX	Customer - Direct
-	Yasodha R	Burlington Textiles Corp of America	NC	Customer - Direct

The screenshot shows a Salesforce dashboard titled "Result Tracking of the candidate". The dashboard includes a sidebar with navigation links: Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, People, Cases, Forecasts, and More. The main content area displays a "New Accounts Report" table with columns: Last Activity, Account Owner, Account Name, Billing State/Province, and Type. The table lists several accounts, including "Sample Account for Entitlements", "GenePoint", "United Oil & Gas, UK", "United Oil & Gas, Singapore", "Edge Communications", "Burlington Textiles Corp of America", "Pyramid Construction Inc.", "Dickenson plc", "Grand Hotels & Resorts Ltd", "Espress Logistics and Transport", "University of Arizona", and "United Oil & Gas Corp.". A "View Report (New Accounts Report)" button is visible at the bottom of the table.

Last Activity	Account Owner	Account Name	Billing State/Province	Type
-	Automated Process	Sample Account for Entitlements	-	-
-	Yasodha R	GenePoint	CA	Customer - Channel
-	Yasodha R	United Oil & Gas, UK	UK	Customer - Direct
-	Yasodha R	United Oil & Gas, Singapore	Singapore	Customer - Direct
-	Yasodha R	Edge Communications	TX	Customer - Direct
-	Yasodha R	Burlington Textiles Corp of America	NC	Customer - Direct
-	Yasodha R	Pyramid Construction Inc.	-	Customer - Channel
-	Yasodha R	Dickenson plc	KS	Customer - Channel
-	Yasodha R	Grand Hotels & Resorts Ltd	IL	Customer - Direct
-	Yasodha R	Espress Logistics and Transport	OR	Customer - Channel
-	Yasodha R	University of Arizona	AZ	Customer - Direct
-	Yasodha R	United Oil & Gas Corp.	NY	Customer - Direct

4. TRAILHEAD PROFILE PUBLIC URL

Team lead: <https://trailblazer.me/id/yrajasekaran>

Team member: <https://trailblazer.me/id/tdharani8>

Team member: <https://trailblazer.me/id/vaanishrre>

Team member: <https://trailblazer.me/id/jsafira>

5. ADVANTAGES AND DISADVANTAGES:

ADVANTAGES	DISADVANTAGES
An efficient dashboard streamlines sales activities	Dependent on proper setup.
Potential to add revenue	Focused on the wrong person
Allows for easier collaboration	Can be costly
Enables automation of repetitive tasks	A waste of time if used incorrectly

6. APPLICATIONS:

Using CRM is one way to record your activities. It includes tools for tracking results using internal marks by providing a way to search for information by date and time. It can be possible to create a record for each person in the system itself.

7. CONCLUSION:

It can be concluded that the Customer Relationship Management in tracking is satisfactory. You can track your overall sales process, log customer information and monitor company goals. Monitoring your progress does give you a sense direction and helps you make the necessary adjustments to your daily activity. But in addition to that, it also works on a major positive impact on your confidence and motivation.

8.FUTURE SCOPE:

The scope of CRM includes a wide range of activities, from managing customer contact information to developing personalized marketing campaigns. In order to be effective, it must be tailored to the specific needs of each business. As such, the scope of CRM can vary greatly from one company to the next.