

CRM-APPLICATION THAT HELPS TO BOOK A VISA SLOT

1 INTRODUCTION

1.1 Overview

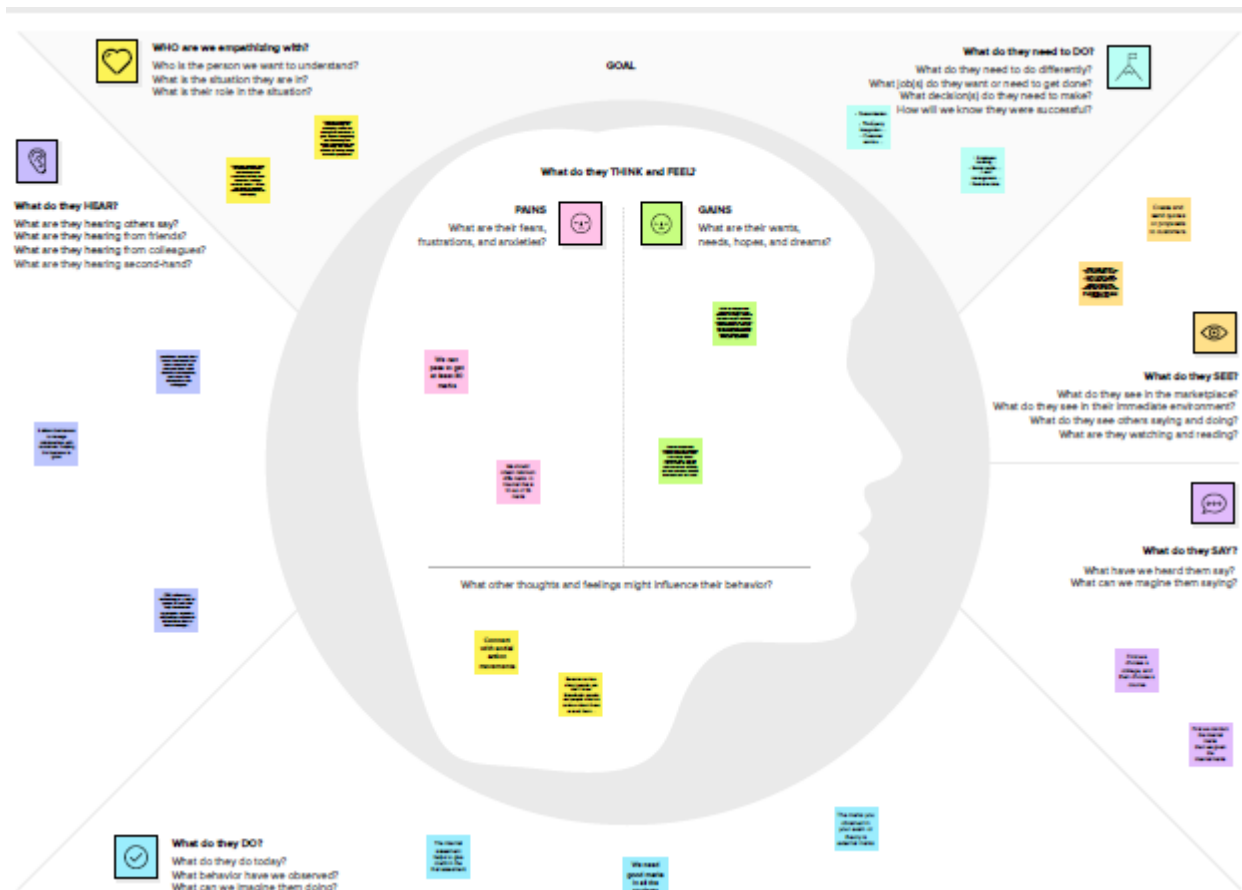
Customer relationship management (CRM) is the combination of practices, strategies and technologies that companies use to manage and analyze customer interactions and data throughout the customer lifecycle. The goal is to improve customer service relationships and assist in customer retention and drive sales growth.

1.2 Purpose

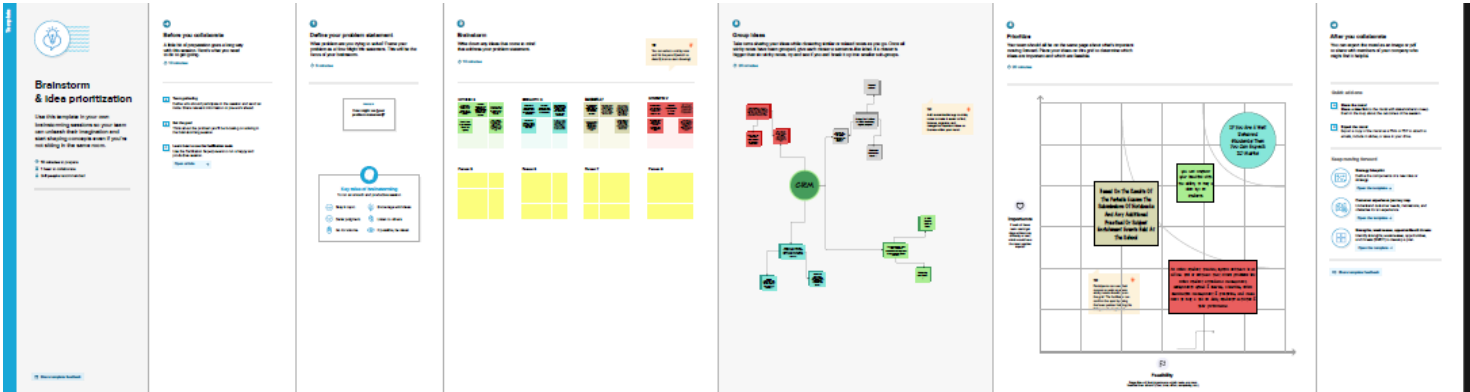
Customer relationship management (CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers. The goal is simple: Improve business relationships. A CRM system helps companies stay connected to customers, streamline processes, and improve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

2 Problem Definition & Design Thinking

2.1 Empathy Map Canvas



2.2 Brainstorming & Idea Prioritization Template



3 RESULT

3.1 Data Model:

1.Passport

Field label	Data type
Contact Number	Number
Full Name	Text
Passport Number	Text
Permanent Address	Text

2 Visa Slot

Field label	Data type
Location	Text area
Time	Time
Passport Number	Text
VisaSlot Number	Number

3. payment

Field label	Data type
payment mode	text
Card number	number
Transaction id	text
Cancel transaction	text
Visa slot number	text

4.Reschedule/Cancel

Field Label	Data Type
Passport number	number
location	text
time	time
cancel	text
status	text

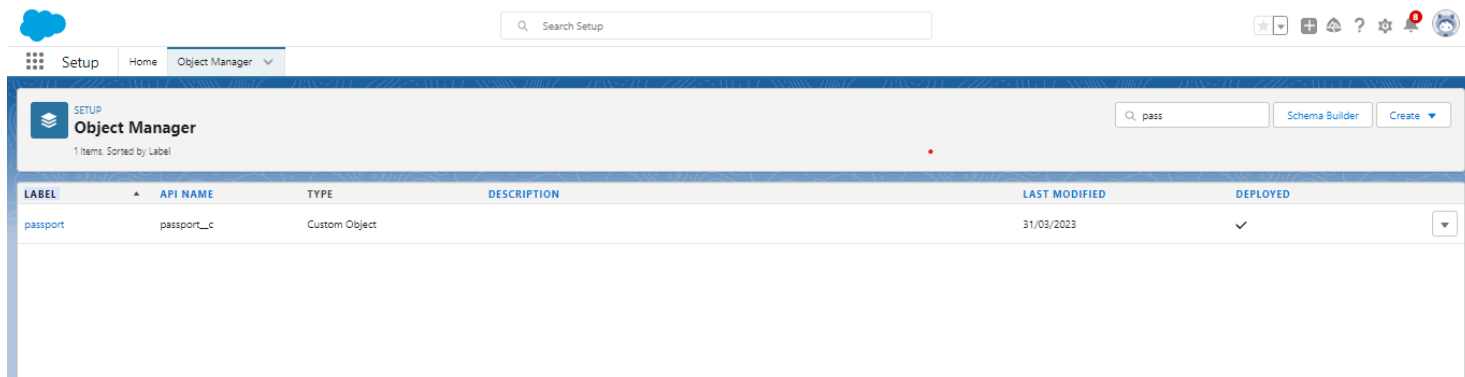
3.2

Activity & Screenshot

(Milestone-2:OBJECT)

Activity-1 : Creation of passport Object

Creation of Object for passport



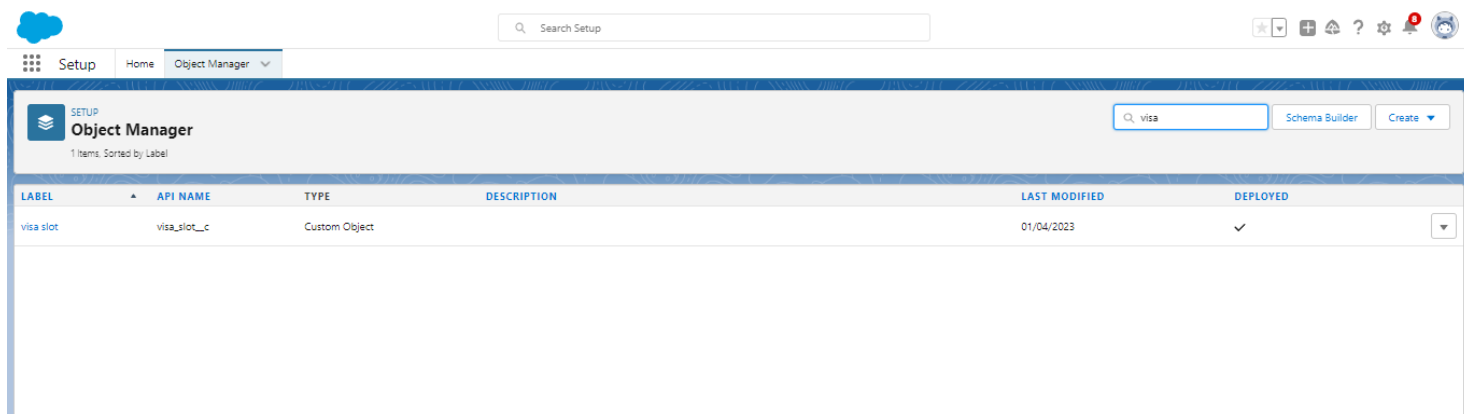
The screenshot shows the 'Object Manager' interface. At the top, there's a search bar with 'Search Setup'. Below it, a navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main header area displays 'Object Manager' with a sub-header '1 Items, Sorted by Label'. On the right, there's a search input with 'pass', a 'Schema Builder' button, and a 'Create' dropdown. The main content is a table with the following data:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
passport	passport_c	Custom Object		31/03/2023	✓

(Milestone-2:OBJECT)

Activity-2 : Create visa slot Object

Creation of visa slot Object



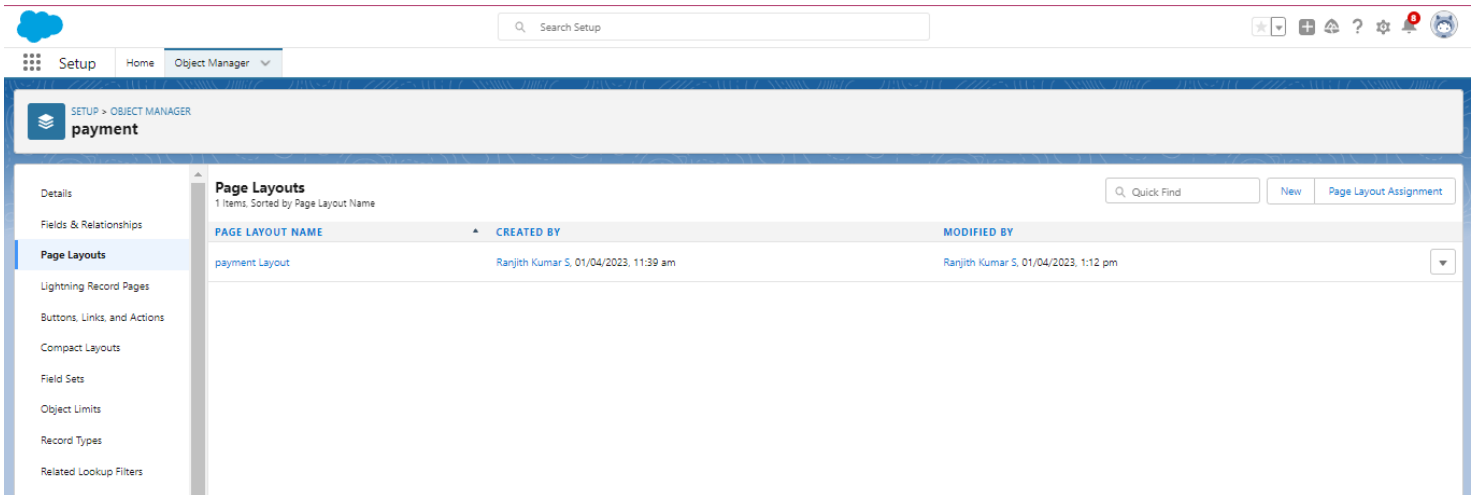
The screenshot shows the 'Object Manager' interface after creating a new object. The search bar now contains 'visa'. The table has been updated with the following data:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
visa slot	visa_slot_c	Custom Object		01/04/2023	✓

(Milestone-2: OBJECT)

Activity-3 : Create payment Object

Creation of Payment Object



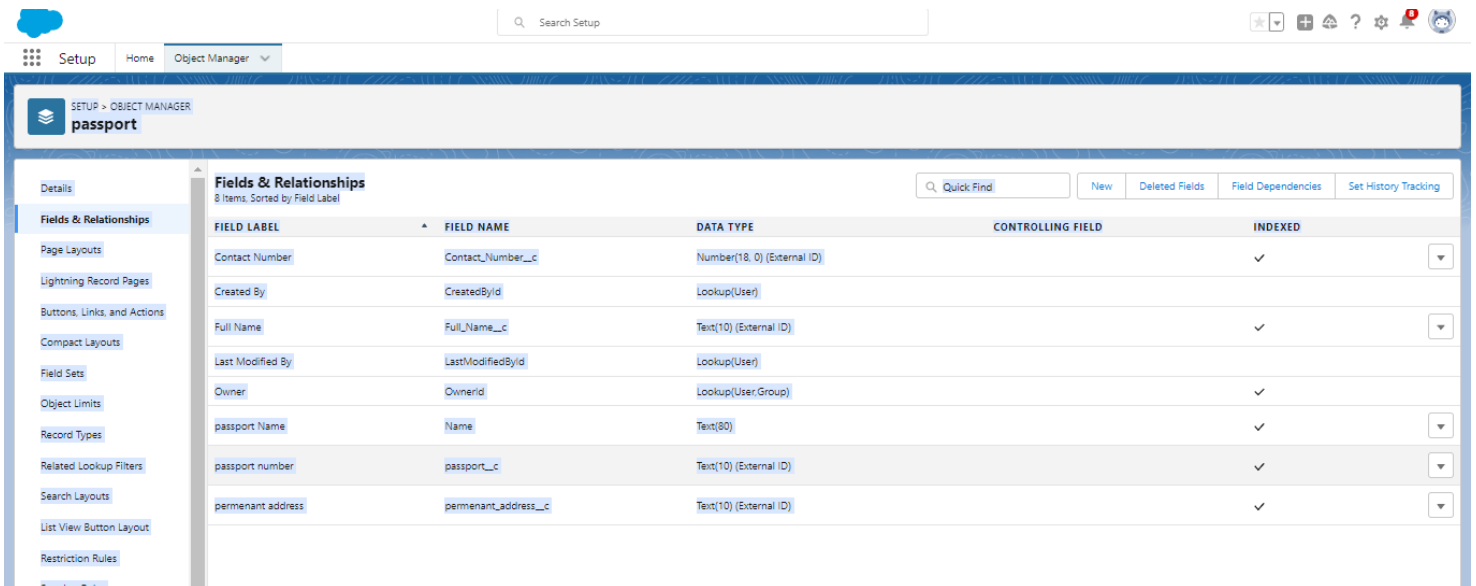
The screenshot shows the Salesforce Setup interface for the 'payment' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Page Layouts' and shows a table with one item, 'payment Layout'. The table has columns for 'PAGE LAYOUT NAME', 'CREATED BY', and 'MODIFIED BY'. The 'payment Layout' row shows it was created by 'Ranjith Kumar S' on '01/04/2023, 11:39 am' and modified by 'Ranjith Kumar S' on '01/04/2023, 1:12 pm'. The top of the page includes a search bar labeled 'Search Setup' and a 'Quick Find' bar.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
payment Layout	Ranjith Kumar S, 01/04/2023, 11:39 am	Ranjith Kumar S, 01/04/2023, 1:12 pm

(Milestone-3: relation b/w objects;)

Activity-1 : Creation of relationship

Creation of relationship



The screenshot shows the Salesforce Setup interface for the 'passport' object. The 'Fields & Relationships' section is active, displaying a list of 8 fields sorted by Field Label. The fields are:

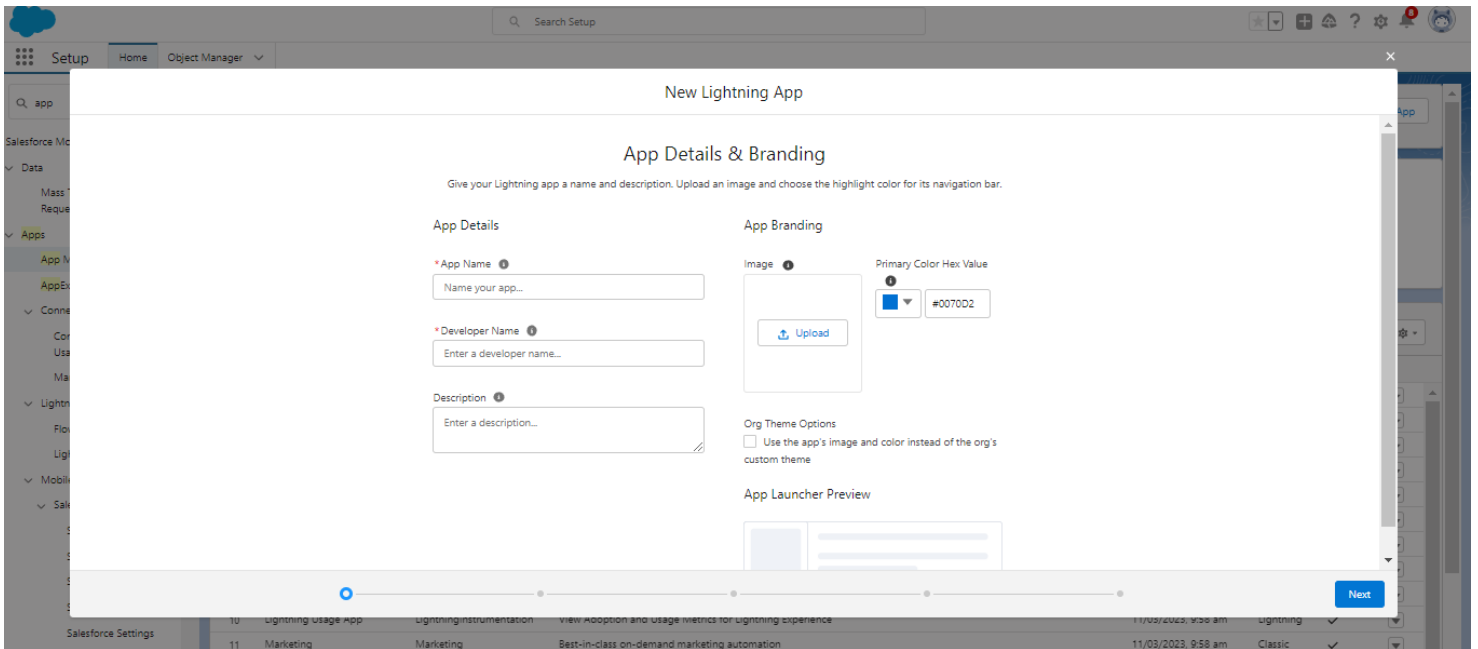
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Contact Number	Contact_Number__c	Number(18, 0) (External ID)		✓
Created By	CreatedById	Lookup(User)		
Full Name	Full_Name__c	Text(10) (External ID)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
passport Name	Name	Text(80)		✓
passport number	passport__c	Text(10) (External ID)		✓
permanant address	permanant_address__c	Text(10) (External ID)		✓

The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'.

(Milestone-4: App)

Activity-1 : Creation of app

Creation of fields for the School Object



Id	Lightning Usage App	Lightning Instrumentation	view Adoption and Usage Metrics for Lightning Experience	11/03/2023, 9:56 am	Lightning	✓
11	Marketing	Marketing	Best-in-class on-demand marketing automation	11/03/2023, 9:58 am	Classic	✓

(Milestone-5: User)

Activity-2 : Creation of user

Creation of user

Setup | Home | Object Manager | **Users**

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

View: **All Users** | [Edit](#) | [Create New View](#)

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty00q2w00000rk51reat_4qo8npub0wv@chatter.salesforce.com		✓	Chatter Free User
Edit	S. Ranjith Kumar	RS	ranjithk3072003@gmail.com		✓	System Administrator
Edit	S. RANJITHKUMAR	rs	ranjithk143@gmail.com		✓	System Administrator
Edit	User Integration	intgr	integration@00q2w00000rk51reat.com		✓	Analytics Cloud Integration User
Edit	User Security	sec	insightsecurity@00q2w00000rk51reat.com		✓	Analytics Cloud Security User

[New User](#) | [Reset Password\(s\)](#) | [Add Multiple Users](#)

Activity-2: O W D-organization wide default settings

Setup | Home | Object Manager ▾

Q shA

- Development
- Org Shape
- Security
 - Sharing Settings**

Didn't find what you're looking for?
Try using Global Search.

SETUP Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: **All Objects** ▾

[Disable External Sharing Model](#)

Default Sharing Settings

[Edit](#) [Organization-Wide Defaults Help ?](#)

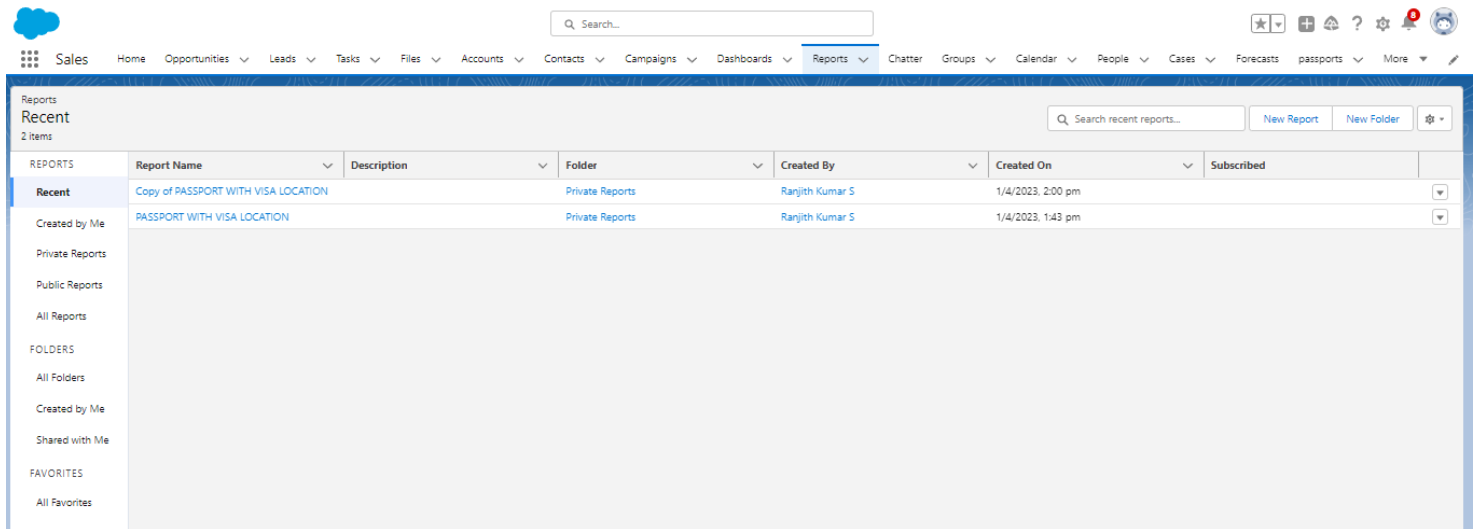
Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓

Organization-Wide Defaults		Edit	Organization-Wide Defaults Help ?
Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓

(Milestone-6: REPORTS)

Activity-1 : Creation of reports

Creation on reports



The screenshot shows the 'Reports' section of the Smart Internz application. The top navigation bar includes 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', 'Reports' (selected), 'Chatter', 'Groups', 'Calendar', 'People', 'Cases', 'Forecasts', 'passports', and 'More'. A search bar is located in the top right. The 'Reports' section has a sidebar with 'Recent' (2 items), 'Private Reports', 'Public Reports', 'All Reports', 'FOLDERS', 'All Folders', 'Created by Me', 'Shared with Me', 'FAVORITES', and 'All Favorites'. The main area displays a table of recent reports.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Copy of PASSPORT WITH VISA LOCATION		Private Reports	Ranjith Kumar S	1/4/2023, 2:00 pm	
Created by Me	PASSPORT WITH VISA LOCATION		Private Reports	Ranjith Kumar S	1/4/2023, 1:43 pm	

(Milestone-7:Dashboard)

Activity-1 : Creating of dashboard

Creating of dashboard

(Milestone-7: PERMISSION SETS)

Activity-1 : Permission sets 1:

To Set Permissions

The screenshot shows the Salesforce Setup page for Permission Sets. The browser address bar displays the URL: <https://testlatech2-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home>. The left sidebar contains a search bar with the text "permission" and a list of navigation items: Users, Permission Set Groups, Permission Sets (highlighted), Custom Code, and Custom Permissions. The main content area is titled "Permission Sets" and includes a sub-header "SETUP Permission Sets". Below this, there is a brief description of the page's functionality and a link to the SalesforceA mobile app. A table titled "All Permission Sets" is displayed, showing a list of permission sets. The table has columns for Action, Permission Set Label, Description, and License. The first row shows a permission set labeled "Teacher permission" with a "Del" button and a "Clone" link.

Permission Sets

On this page you can create, view, and manage permission sets.

In addition, you can use the SalesforceA mobile app to assign permission sets to a user. Download SalesforceA from the App Store or Google Play: [iOS](#) | [Android](#)

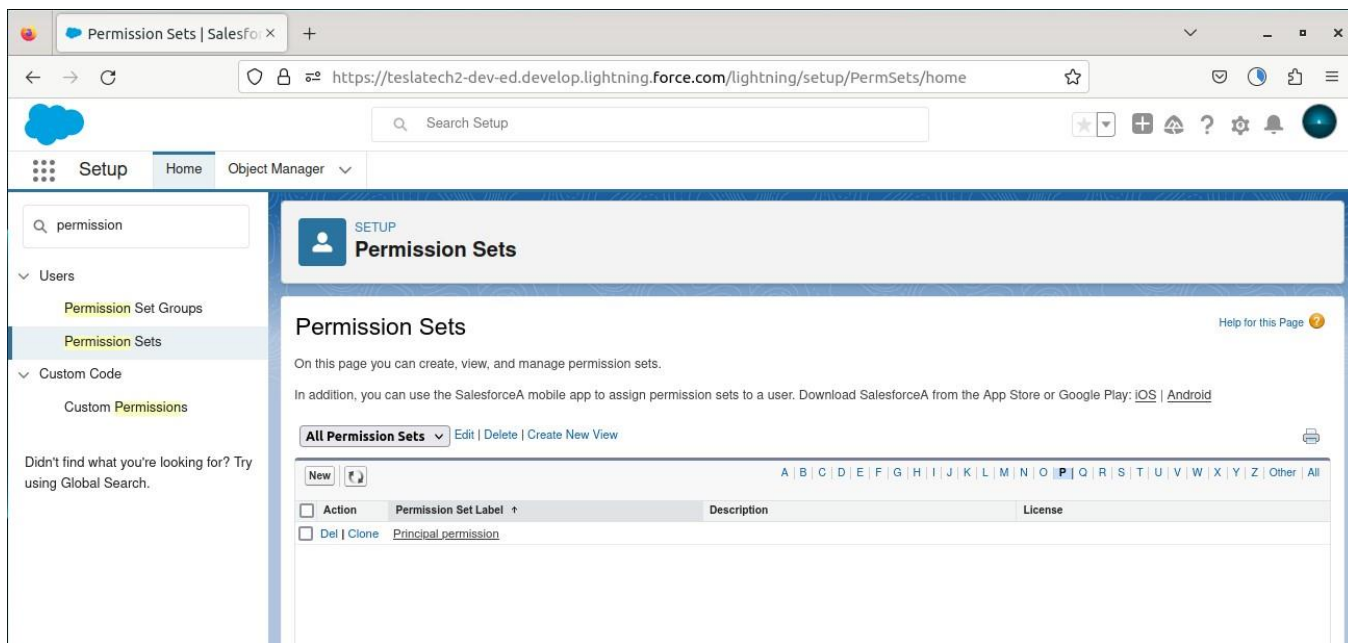
All Permission Sets | Edit | Delete | Create New View

Action	Permission Set Label	Description	License
Del Clone	Teacher permission		

(Milestone-7: PERMISSION SETS)

Activity-2 : Permission sets 2:

To Set Permissions



The screenshot shows the Salesforce Setup page for Permission Sets. The browser address bar displays the URL: <https://teslatech2-dev-ed.develop.lightning.force.com/lightning/setup/PermSets/home>. The left sidebar contains a search bar with "permission" and a list of navigation items: Users, Permission Set Groups, Permission Sets (selected), Custom Code, and Custom Permissions. The main content area is titled "Permission Sets" and includes a "Help for this Page" link. Below the title, there is a brief description of the page's purpose and a link to download the SalesforceA mobile app. A table titled "All Permission Sets" is visible, with columns for Action, Permission Set Label, Description, and License. The table currently shows one entry: "Principal permission".

Action	Permission Set Label	Description	License
Del Clone	Principal permission		

4

TRAILHEAD PROFILE PUBLIC URL:

TEAM LEAD - <https://trailblazer.me/id/ranjs33>

Team Member 1 - <https://trailblazer.me/id/ed993c97ca8c4f3bfca450cababd5805>

Team Member 2 - <https://trailblazer.me/id/naves54>

Team Member 3 - <https://trailblazer.me/id/santha123>

[ADVANTAGES]**1. Better customer service**

Modern CRM software has many functions, but the software was created to improve business-customer relationships, and that's still its main benefit. A CRM manages all of your contacts and gathers important customer information— like demographics, purchase records and previous messages across all channels – and makes it easily accessible to anyone in your company who needs it. This ensures that your employees have all they need to know about the customer at their fingertips and can provide a better customer experience, which tends to boost customer satisfaction.

2. Increased sales

A CRM tool can help you streamline your sales process, build a sales pipeline, automate key tasks and analyze all of your sales data in one centralized place, potentially increasing sales and productivity. A CRM helps you establish a step-by-step sales process that your employees can rely on every time and that you can easily tweak as issues arise.

3. Improved customer retention

Once you've procured and converted leads, it's vital that you put in the work to retain them as customers and promote customer loyalty. High customer turnover can have many negative effects for your business, like diminished revenue or disrupted cash flow, so use your CRM and the information it provides about your customers to encourage repeat business. The CRM will provide sentiment analysis, automated ticketing, customer support automation and user behavior tracking to help you determine problems and quickly address them with your customers.

4. Detailed analytics

It's one thing to have plenty of data about your customers, but you need to know what it means and how to use it. CRM software typically has built-in analytic capabilities to contextualize data, breaking it down into actionable items and easily understood metrics. Metrics such as click-through rates, bounce rates, and demographic information allow you to judge the success of a marketing campaign and optimize accordingly.

5. Higher productivity and efficiency

CRM software uses marketing automation technology, which expedites menial tasks like drip campaigns and frees up your employees' time to focus on work only humans can handle, like creating content. It can also ensure that no tasks slip through the cracks (e.g., all important emails are always sent to the right people). Additionally, a CRM can show you a dashboard of how your business processes are working and where your workflows could improve. [Read related article: [How Workplace Automation Software Can Help Your Business](#)]

6. Automated sales reports

Your team can easily collect and organize data about prospective and current customers using the CRM software's dashboard and reporting features, which allow employees to automate and manage their pipelines and processes. The CRM can also help your team members evaluate their performance, track their quotas and goals, and check their progress on each of their projects at a glance.

[DISADVANTAGES]

1. A costly project

CRM software tool is an expensive investment that some businesses can only afford, and if they do invest, it doesn't guarantee the return on investment is worth it. It is a huge investment that factors like data migration, integration cost, training, and support also affect.

Even for a locally hosted customer relationship management system, the company is associated with overhead costs because they require to pay professionals like software developers, system administrators, and maintenance personnel. These people ensure that the software works properly and maintain the data backups, too that also an expense with running a customized CRM.

2. Have poor usability

Some CRM systems could be more user-friendly as users need to learn how to use CRM to save time and energy to make the system work according to them. Some small businesses try to refrain from using CRM as they need help handling it.

3. CRM is not fully customized

A business can only customize a CRM system and make CRM fit their specific needs and requirements. It can create problems for CRM users; they get frustrated and need help to make the system work according to their requirements.

4. Having lots of security concerns

There are many security issues with CRM, such as data loss and data being hacked by someone. In CRM, the collected data is stored at one centralized location that can be accessed by unfair means. In another case, inaccurate data can be added by employees, or they manipulate figures leading to wrongful planning.

5. Not suitable for every business

Every business can't afford CRM for data collection and connecting with customers. Some businesses can't connect to the customers directly therefore, they don't need a CRM tool. Forming CRM to make it function properly company or business has to spend a lot of money, including various phases.

6. CRM is not fully customized

A business can only customize a CRM system and make CRM fit their specific needs and requirements. It can create problems for CRM users; they get frustrated and need help to make the system work according to their requirements.

7. Experience-based procedure in all the stages

Small businesses may not require it, but large businesses use CRM on a large scale. For this purpose, they train their employees by providing training sessions from the appointed professionals. The company invests in employee training to improve its productivity, where employees encounter and learn the various features and functions of CRM. This experience will help them in all the stages of CRM.

APPLICATIONS

(Applications of a CRM – Examples and Strategies)

- * Application 1: Tracking Customers
- * Application 2: Collecting Data for Marketing
- * Application 3: Improving Interactions and Communications
- * Application 4: Streamlining Internal Sales Processes
- * Application 5: Planning Your Operations.

CONCLUSION

Business is an ongoing process that has to update itself with time (adopt new technologies) to remain in the competition. Before technology, customer data or CRM was based on papers, but slowly, companies started tracking customer-related data with spreadsheets, emails, address books, and other ways.

But due to a lack of automation and integration, it becomes difficult for them to find and share up-to-date information when required quickly. It also down their ability to create marketing strategies, provide customers flawless service, and peruse new sales leads.

CRM is a powerful tool that automatically collects information about existing and prospective customers (their personal or professional information, including social media posts, phone numbers, email addresses, phone numbers, service, purchase history, and support tickets). Further, the whole information is integrated by the system and generates consolidated profiles that can be shared with appropriate teams. One of the best features of CRM is that it can connect with other business tools, such as document-sharing apps and online chat.

Artificial intelligence and business intelligence capabilities are built in CRM that accelerate administrative tasks and provide actionable insights. Customer relationship management's advantages and disadvantages will help you understand it in detail.

(Image result for crm future scope)

“[The future of CRM] is about which companies will be able to pivot to meet the changing needs and trends — driven by customer expectations. Customers expect organizations to know a lot about them and expect to have conversations.”

