

# Project Report Template

## INTRODUCTION

### 1.1 Overview:

A visa slot management project is a system that is used to track and manage the availability of visa slots, which are appointments that are required for certain visa applications. It might be used by a government agency or a visa processing center to schedule and manage appointments with applicants.

### 1.2 Purpose:

- **Centralizing Customer Data:** Salesforce enables businesses to centralize all customer data in one place, making it easy for sales, marketing, and customer service teams to access and use the information they need to provide better customer experiences.
- **Automating Sales Processes:** Salesforce provides automation tools that can help businesses streamline their sales processes, such as lead nurturing, opportunity management, and sales forecasting. This can help sales teams to close deals faster and with less effort.
- **Enhancing Collaboration:** Salesforce can facilitate collaboration among different teams, including sales, marketing, and customer service, by enabling them to share information, track progress, and work together to achieve common goals.

## 2. Problem Definition and Design Thinking

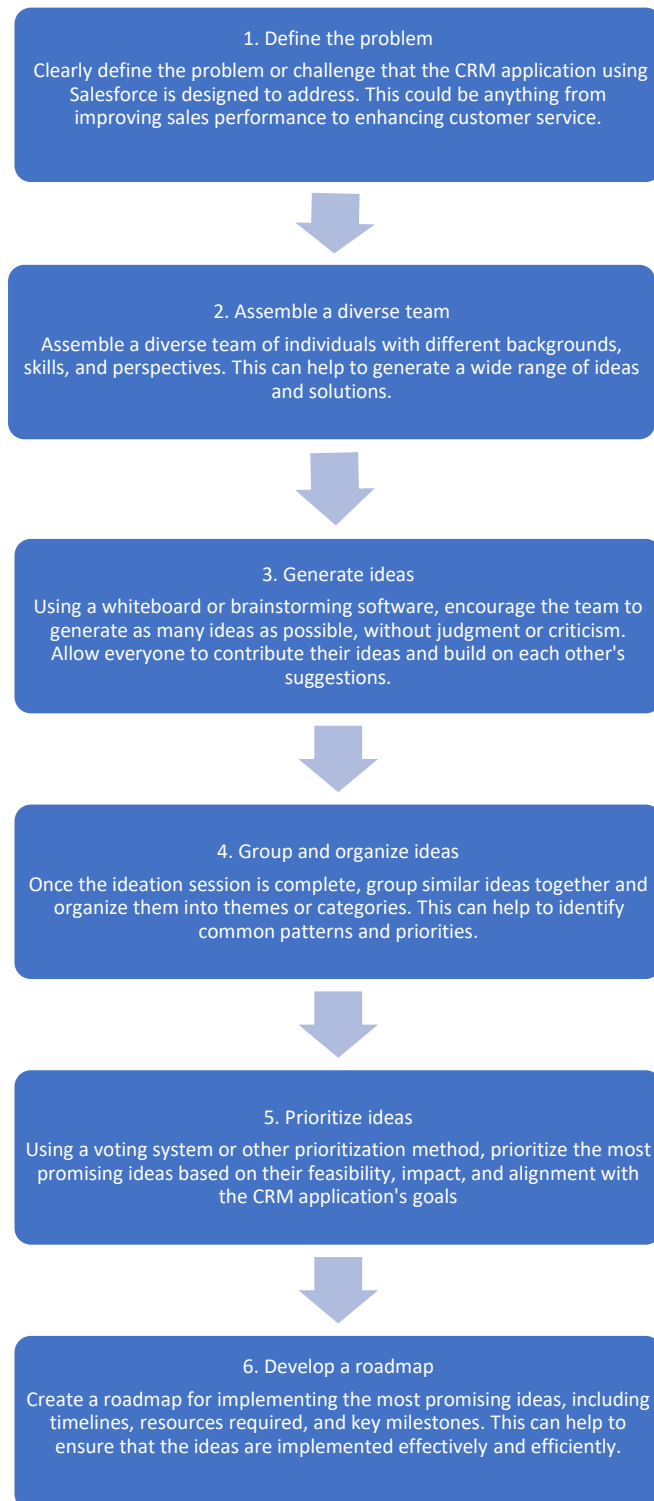
### 2.1 Empathy Map

Identify the key customer segments that the CRM application is designed for, such as sales representatives, marketing managers, or customer service agents. Create a detailed persona for each segment, including their needs, pain points, goals, and behaviors.	Identify the key actions and behaviors that customers take when using the Salesforce CRM application. For example, they may search for leads, update contact information, or create reports.
Explore the emotions and feelings that customers may experience when using the Salesforce CRM application. For example, they may feel frustrated if the application is slow or difficult to use, or they may feel empowered if they can easily access the data they need.	Identify the key pain points and challenges that customers may face when using the Salesforce CRM application. For example, they may struggle with data entry, or they may find it difficult to navigate the user interface.

Identify the key goals and motivations that customers have when using the Salesforce CRM application. For example, they may want to increase their sales performance, improve customer satisfaction, or streamline their workflow.

Use the insights gained from the empathy mapping exercise to inform the design and implementation of the Salesforce CRM application. For example, the application could be designed to address the customer's pain points and challenges, and to help them achieve their goals and motivations.

## 2.2 Ideation and Brainstorming map Screenshot:



### 3. RESULT

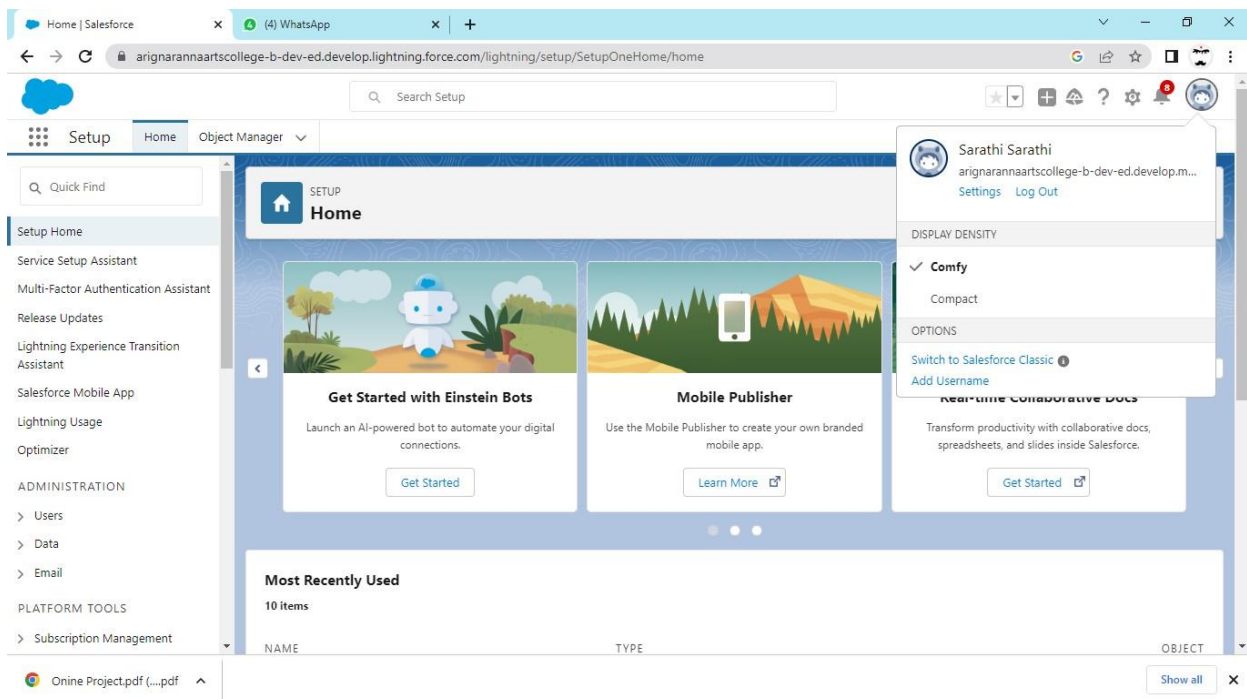
#### 3.1 Data Model:

Object Name	Fields in the Object
Passport	Field Label: Full Name Data Type: Text Field Label: Passport Number Data Type: Number Field Label: Contact Number Data Type: Number Field Label: Permanent Address Data Type: Text
Visa Slot	Field Label: Location Data Type: Geo-location Field Label: Time Data Type: Time Field Label: Passport Number Data Type: Master relationship Field Label: Visa Slot Number Data Type: Number
Payment	Field Label: Payment mode Data Type: Currency Field Label: Card Number Data Type: Number Field Label: Transaction Id Data Type: Auto Number Field Label: Cancel Transaction

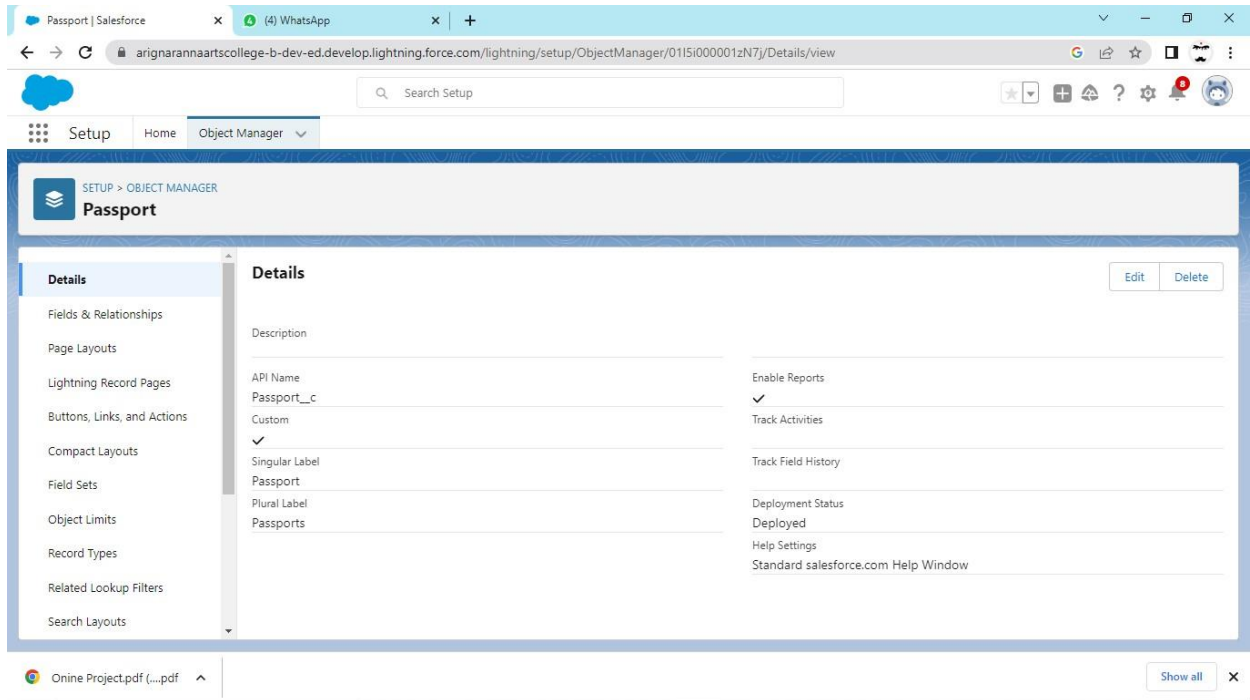
	Data Type: Auto Number Field Label: Visa Slot Number Data Type: Master Relationship
Reschedule/Cancel	Field Label: Passport Number Data Type: Master Relationship Field Label: Location Data Type: Geo-location Field Label: Time Data Type: Time Field Label: Cancel Data Type: Text

### 3.2 Activity and Screenshot:

#### Create Salesforce Org-Creating Developer Account



## Creation of Custom Object (Passport)



This screenshot shows the 'Details' page for the 'Passport' custom object in Salesforce Setup. The left sidebar contains a navigation menu with options like 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', and 'Search Layouts'. The main content area is titled 'Details' and includes a description field, API Name (Passport\_\_c), Custom checkbox, Singular Label (Passport), Plural Label (Passports), and various system settings like 'Enable Reports' (checked), 'Track Activities', 'Track Field History', 'Deployment Status' (Deployed), and 'Help Settings' (Standard salesforce.com Help Window). 'Edit' and 'Delete' buttons are in the top right.

Setup > OBJECT MANAGER  
**Passport**

**Details** [Edit] [Delete]

Description

API Name  
Passport\_\_c

Custom  
✓

Singular Label  
Passport

Plural Label  
Passports

Enable Reports  
✓

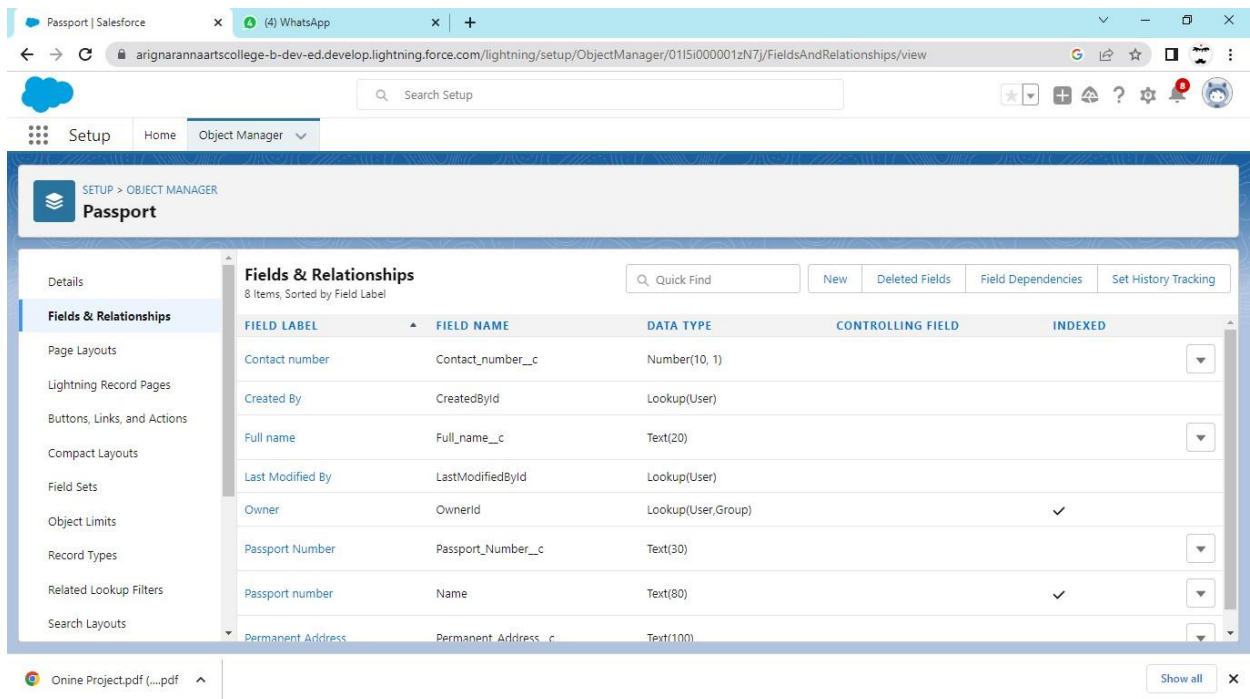
Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

## Creation of Fields on Custom Object (Passport)



This screenshot shows the 'Fields & Relationships' page for the 'Passport' custom object. The left sidebar is the same as the previous screenshot. The main content area is titled 'Fields & Relationships' and shows a list of 8 fields. The fields are: 'Contact number' (Contact\_number\_\_c, Number(10, 1)), 'Created By' (CreatedById, Lookup(User)), 'Full name' (Full\_name\_\_c, Text(20)), 'Last Modified By' (LastModifiedById, Lookup(User)), 'Owner' (OwnerId, Lookup(User, Group), indexed), 'Passport Number' (Passport\_Number\_\_c, Text(30)), 'Passport number' (Name, Text(80), indexed), and 'Permanent Address' (Permanent\_Address\_\_c, Text(100)). The page includes a 'Quick Find' search bar and buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'.

Setup > OBJECT MANAGER  
**Passport**

**Fields & Relationships** [Quick Find] [New] [Deleted Fields] [Field Dependencies] [Set History Tracking]

8 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Contact number	Contact_number__c	Number(10, 1)		
Created By	CreatedById	Lookup(User)		
Full name	Full_name__c	Text(20)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User, Group)		✓
Passport Number	Passport_Number__c	Text(30)		
Passport number	Name	Text(80)		✓
Permanent Address	Permanent_Address__c	Text(100)		

## Creation of Relationship (Passport and Visa)

The screenshot shows the Salesforce Setup interface for the 'Visa slot' object. The left sidebar contains navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Visa slot Custom Field: Passport Number' and includes a 'Back to Visa slot' link. Below this is the 'Custom Field Definition Detail' section with tabs for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. The 'Field Information' table lists: Field Label (Passport Number), Field Name (Passport\_Number), API Name (Passport\_Number\_\_c), Object Name (Visa slot), Data Type (Master-Detail), Description, Help Text, Data Owner, Field Usage, Data Sensitivity Level, and Compliance Categorization. It also shows 'Created By: Sarathi Sarathi, 11/04/2023, 12:42 pm' and 'Modified By: Sarathi Sarathi, 11/04/2023, 12:42 pm'. The 'Master-Detail Options' section shows 'Related To: Passport' and 'Child Relationship Name: Visa\_slots'. A 'Show all' button is at the bottom right.

## Creation of App

The screenshot shows the Salesforce App Page for the 'Passports' app. The top navigation bar includes 'Book My Visa', 'Passports' (selected), 'Visa slots', 'Payments', and 'Reschedule/cancels'. The main content area is titled 'Passports Recently Viewed' and shows '0 items • Updated a few seconds ago'. A search bar 'Search this list...' is present. Below the list, a message states: 'You haven't viewed any Passports recently. Try switching list views.' The bottom of the page has a 'Show all' button.

# Creation of User

The screenshot shows the Salesforce Setup page for User Management. The left sidebar contains a search bar with 'user' and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users, Feature Settings, Data.com, Prospector Users, User Interface, Action Link Templates, and Actions & Recommendations. The main content area is titled 'Users' and shows the details for a user named 'Kalaiyarasi Kalaiyarasi'. The user's profile is 'Standard User' and their role is 'Salesforce'. The user's email is 'revathiperumal769@gmail.com' and their username is 'kalaiyarasi@thesmartbridge.com'. The user's nickname is 'Kalai'. The user's address is 'Kalai'. The user's time zone is '(GMT+05:30) India Standard Time (Asia/Kolkata)'. The user's locale is 'English (India)' and their language is 'English'. The user's mobile push registrations are 'View'. The user's profile is 'Standard User' and their role is 'Salesforce'. The user's email is 'revathiperumal769@gmail.com' and their username is 'kalaiyarasi@thesmartbridge.com'. The user's nickname is 'Kalai'. The user's address is 'Kalai'. The user's time zone is '(GMT+05:30) India Standard Time (Asia/Kolkata)'. The user's locale is 'English (India)' and their language is 'English'. The user's mobile push registrations are 'View'.

Name	Role
Kalaiyarasi Kalaiyarasi	Salesforce

Field	Value
Name	Kalaiyarasi Kalaiyarasi
Alias	kkala
Email	revathiperumal769@gmail.com
Username	kalaiyarasi@thesmartbridge.com
Nickname	Kalai
Title	
Company	
Department	
Division	
Address	Kalai
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Language	English

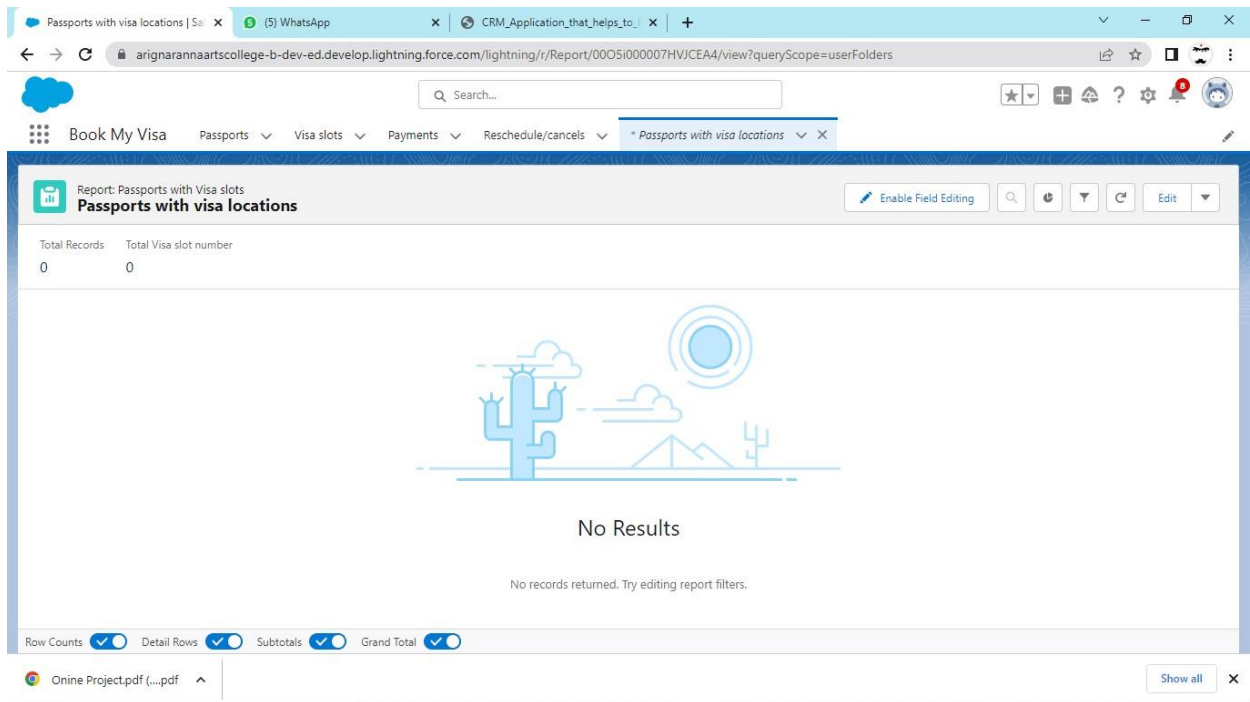
# Create OWD

The screenshot shows the Salesforce Setup page for Sharing Settings. The left sidebar contains a search bar with 'sharing' and a list of navigation items: Security, Sharing Settings, and a message 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Sharing Settings' and shows the 'Organization-Wide Defaults' table. The table has four columns: Object, Default Internal Access, Default External Access, and Grant Access Using Hierarchies. The table lists the following objects and their default access settings:

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	✓

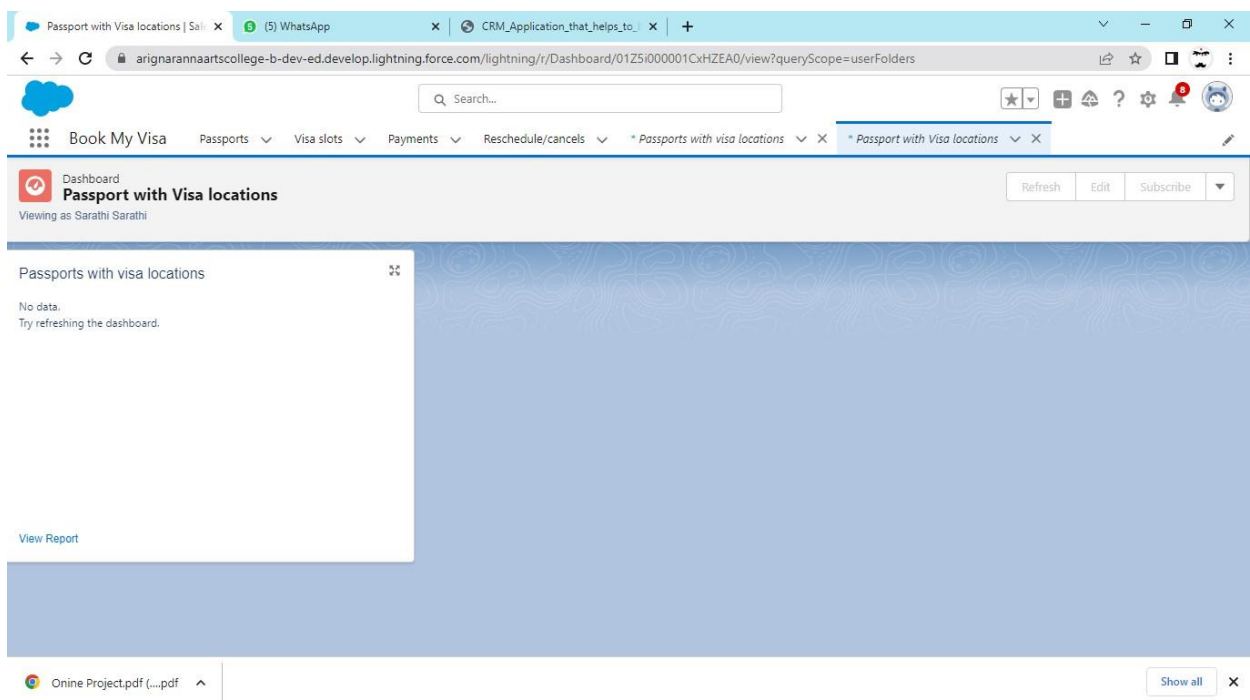


## Creation of Report



The screenshot shows a Salesforce report titled "Report: Passports with Visa locations" and "Passports with visa locations". The report displays two summary rows: "Total Records" with a value of 0 and "Total Visa slot number" with a value of 0. Below the summary rows is a large graphic of a cactus and a sun. The text "No Results" is centered, followed by the message "No records returned. Try editing report filters." At the bottom, there are toggle switches for "Row Counts", "Detail Rows", "Subtotals", and "Grand Total", all of which are currently turned on. A "Show all" button is located in the bottom right corner.

## Creation of Dashboard



The screenshot shows a Salesforce dashboard titled "Dashboard" and "Passport with Visa locations". The dashboard is viewed as "Sarathi Sarathi". It features a single widget titled "Passports with visa locations" which displays the message "No data. Try refreshing the dashboard." Below the widget is a "View Report" link. The dashboard has a blue background with a subtle pattern. A "Show all" button is located in the bottom right corner.

## 4. Trailhead Profile public URL

Team Lead – <https://trailblazer.me/id/hambjn>

Team member 1 - <https://trailblazer.me/id/sindhu0506>

Team member 2 - <https://trailblazer.me/id/fyuva>

Team member 3 - <https://trailblazer.me/id/fwase>

## 5. ADVANTAGES & DISADVANTAGES:

### Advantages:

1. **Scalability:** Salesforce is highly scalable, which means it can grow as your business grows. You can easily add new users, features, and capabilities as needed.
2. **Customization:** Salesforce allows you to customize the software to meet your specific business needs. You can create custom fields, workflows, and reports to track the information that matters most to your business.
3. **Integration:** Salesforce integrates with a wide range of third-party applications, such as marketing automation, accounting, and social media platforms, to provide a complete view of your customer interactions.
4. **Mobile access:** Salesforce is available as a mobile app, which means you can access your customer data and manage your business on-the-go.
5. **Collaboration:** Salesforce offers a range of collaboration features, such as Chatter, which allows you to communicate and collaborate with your team in real-time.

### Disadvantages:

1. **Cost:** Salesforce can be expensive, especially for small businesses. The pricing structure is based on a per-user, per-month subscription model, which can add up quickly.
2. **Complexity:** Salesforce is a complex software that requires a significant amount of training and expertise to use effectively. This can be a barrier to adoption for some businesses.
3. **Customization complexity:** While customization can be a benefit, it can also add complexity to the software. Customizations may require additional development resources, which can add to the cost and complexity of the software.
4. **Support:** Salesforce offers customer support, but it can be difficult to get the help you need quickly. This can be frustrating when you're trying to resolve an urgent issue.
5. **Data privacy concerns:** As with any cloud-based software, there may be concerns about data privacy and security. It's important to evaluate the security and privacy measures of any software you're considering.

## APPLICATION:

1. **Sales Management:** Salesforce can be used to manage the entire sales process, from lead generation to deal closure. Sales teams can use Salesforce to track leads, manage contacts, automate follow-up tasks, and collaborate on deals.

2. **Marketing Automation:** Salesforce provides tools for automating marketing campaigns, such as email marketing, social media marketing, and lead nurturing. Marketing teams can use Salesforce to manage customer data, create targeted campaigns, and track marketing ROI.
3. **Customer Service:** Salesforce can be used to manage customer service processes, such as case management, support ticketing, and customer self-service. Customer service teams can use Salesforce to track customer issues, respond to inquiries, and provide personalized support.
4. **Analytics and Reporting:** Salesforce provides robust reporting and analytics capabilities that can be used to gain insights into sales performance, customer behavior, and market trends. Businesses can use these insights to make data-driven decisions and optimize their sales and marketing processes.
5. **Collaboration and Project Management:** Salesforce provides tools for team collaboration and project management, such as Chatter and Salesforce Communities. These tools can be used to facilitate communication, share files, and manage projects in a centralized platform.

## FUTURE SCOPE:

1. **Artificial Intelligence:** Salesforce is investing heavily in artificial intelligence (AI) to improve its CRM capabilities. With AI-powered tools like Einstein, Salesforce can help businesses to automate tasks, provide personalized recommendations, and improve customer engagement.
2. **Internet of Things (IoT):** The integration of IoT with Salesforce can enable businesses to gather data from connected devices and use that data to gain insights into customer behavior and preferences. This can help businesses to provide personalized services and improve customer experiences.
3. **Blockchain:** The integration of blockchain technology with Salesforce can help businesses to manage customer data securely and transparently. With blockchain, businesses can create a trusted and immutable record of customer interactions, enhancing transparency and trust.
4. **Mobile-first:** The shift towards a mobile-first approach has been gaining momentum, and Salesforce is already offering mobile apps for its CRM platform. In the future, Salesforce may focus more on mobile capabilities, such as voice assistants and augmented reality, to enhance the mobile user experience.
5. **Industry-specific solutions:** Salesforce is increasingly offering industry-specific solutions tailored to the unique needs of different industries, such as healthcare, financial services, and manufacturing. As businesses seek more customized solutions, this trend is likely to continue.