CRM APPLICATION THAT HELPS TO BOOK A VISA SLOT
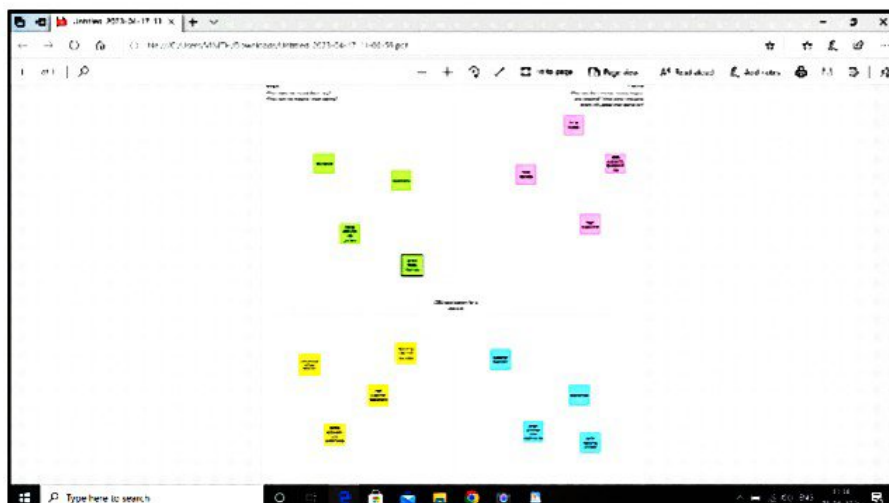
1. INTRODUCTION

1.1 OVERVIEW

Provide in depth of customers that includes meetings,proposals,historical communication notes and sales to invoice information on a single platform.

1.2 PURPOSE

CRM software lets you styore customer and prospect contact information,identify sales opportunities,record service issues and manage market campaining.
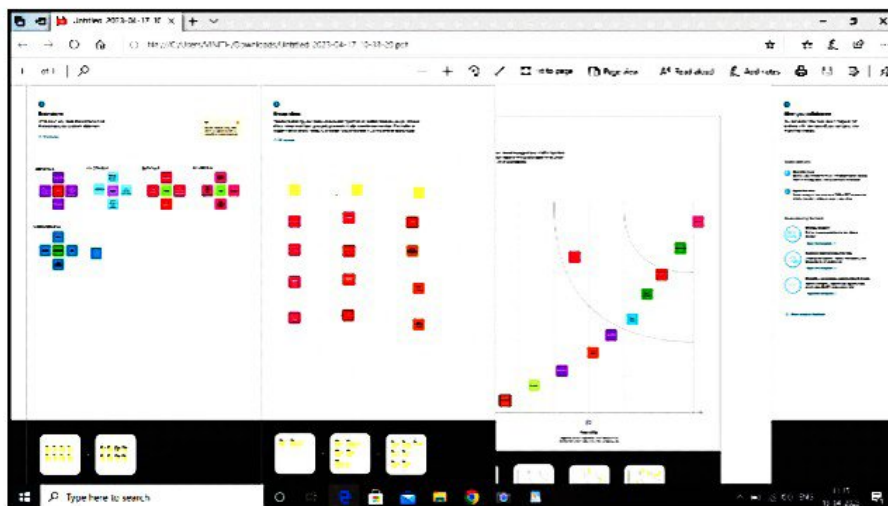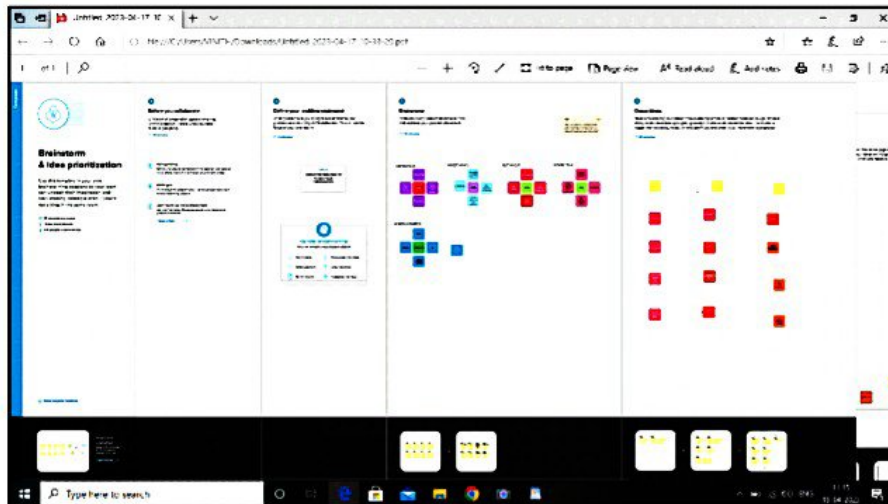
2.PROBLEM DEFINITION AND DESIGN THINKING

2.1 EMPATHY MAP

2.2 IDEATION AND BRAINSTORMING MAP

2.2   IDEATION AND BRAINSTORMING MAP

3.RESULT

3.1 DATA MODEL

OBJECT	NAME
FIELDS IN OBJECT	
OBJ	1
field	label
data type	
passport	number
text	
OBJ	2

OBJ	2
field	label
data type	
contact	number
text	

3.2ACTIVITY

CRM APPLICATIONS THAT HELPS TO BOOK A VISA SLOT

A visa slot management project is a systeam that is used to track and manage the availabilty of visa slots

MILESTONE-1;CREATION OF DEVELOPERORG

INTRODUCTION

Salesforce is your customer success platform , designed to help you sell, service,market, analyze,and connect with your customers.

ACTIVITY1;

Creating a developer org in salesforce.

1.Go to developer. salesforce.com\

2.click on sign up.

3.click on sign up form .enter the following

2.click on sign up.

3.click on sign up form ,enter the following deatils;

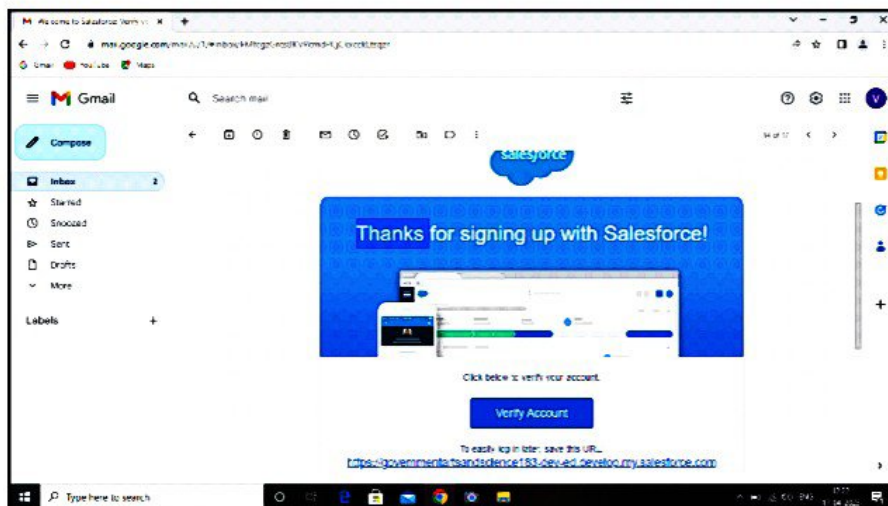1.Firstname&lastname

2.Email

3.Role;Developer

4.company;collegename

5.County;India

6.postalcode;pincode

7.Username;should be a combination of your name and company   this need not be an actual email id , you can give anything in the format;
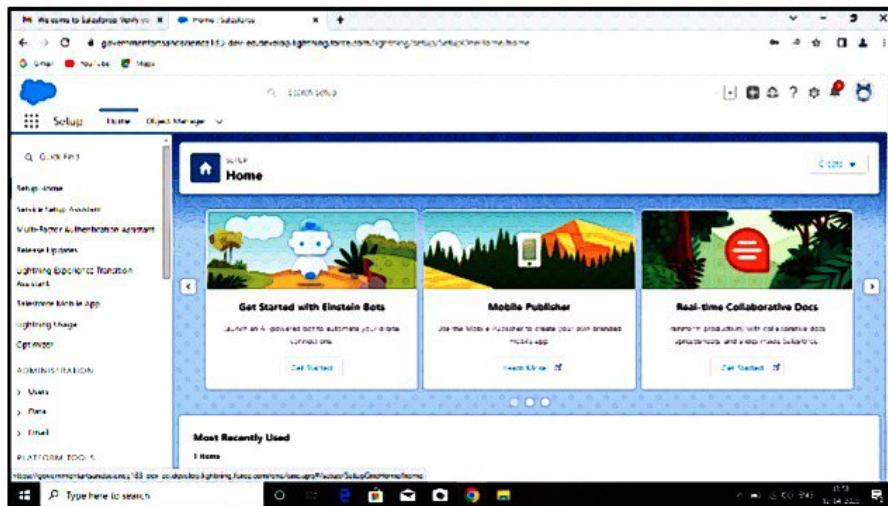

LOGIN TO YOUR SALESFORCE ACCOUNT

1.Go to salesforce .com and on login

2.Enter the username and password that you just created

3.After login this is the home page which youy will see

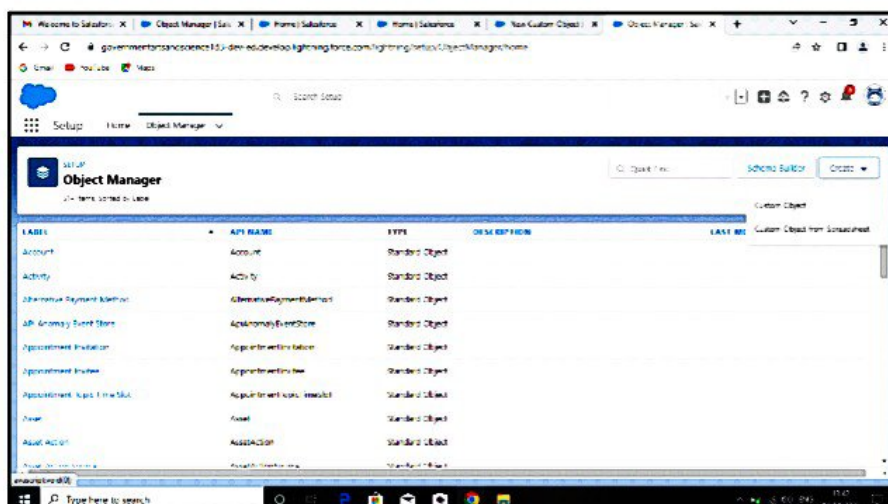**3.** After login this is the home page which youuy will see

MILESTONE-2 OBJECTS

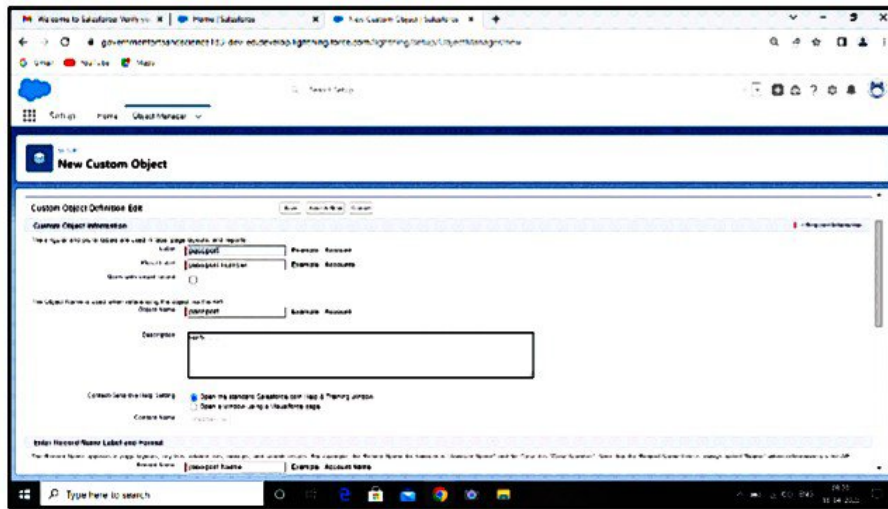Objects are database tables that permit you to store data that is specific to an organization .

ACTIVITY -1

CREATION OF CUSTOM OBJECT-PASSPORT

1. Navigate to **setup** and select **object manager**

2. At the top of the right side there you can

find creade custom object

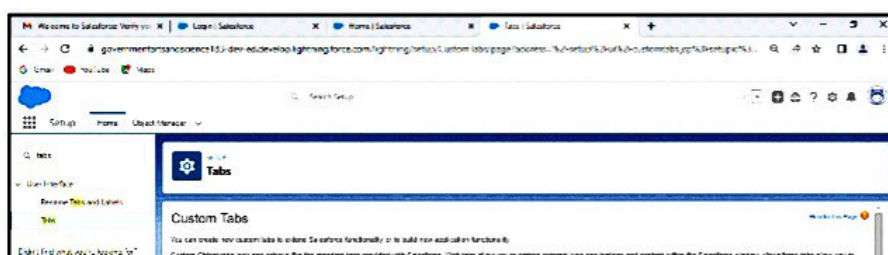3)You will nagative to custom object defination edit where you have to give the object name

4)The label name has passport and plural label has passports.

5)IN enter record name label and format enter name record name has passport number

6)And the data type has text.

7)In depolyment status select deployed option.

8)Ensure that you have to selected at least one option in the object in the object creation option ;it is available only once when a custom object is created

9)Then click on next you will nagative to the new custom object tab where you have to selected tab style and click on next.

10)After tab selection you will be navigated to add to profiles selected defacult on click on next.

11)There after you have to select a custom app selected include tab so that object will be available in all objects and selected save option

ACTIVITY-2;

FIELDS AVAILABLE ON CUSTOM OBJECT ;PASSPORT

FIELD	NAME
DATA TYPE	
contact	Number
Number	
f	ullname
Text	
passport	Number
Text	

relationship

3.At the top right side you can find a new select that option

4.Now you have to select data type.,select number has data type

5.And you will navigate to enter the details page where you give the field label

page where you give the field label

6. And give the label name has contact number

7. And length should be 10 at the bottom of the object you can find options like required , unique,external iod select required option so that always require a value in this field in order to save.

8. Click next you will navigate tto field level security click on visible checkbox so that it is visible to all profiles

9. select the next option, select the page layout and save it

MILESTONE-3: RELATIONSHIP B/W OBJECTS

Relationship is salesfiorce a two way association between 2 objects. using relationships we can link objects with each other and we can make connections and display data data about other related objects

ACTIVITY-1

CREATION OF RELATIONSHIP

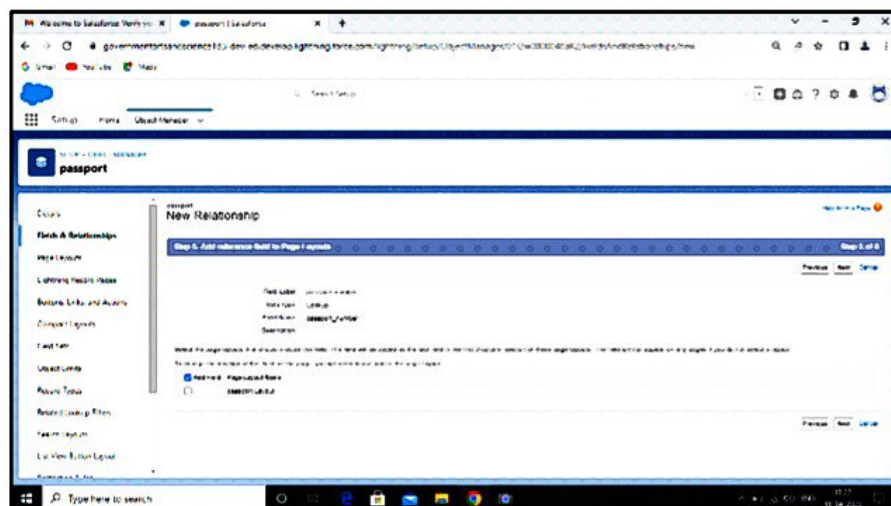To create a master detail relationship between passport and visa

2.Go to the object manager and select visa object from the list
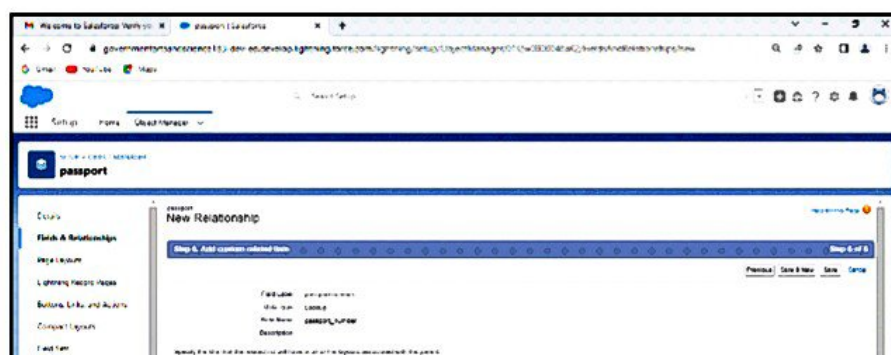
3.And select fields and relationships and click on new

4.Select the data type has master detail relationships

5.And select related to the object has passport,and click next on it

6.You will navigate to the label name page where you gave the label name for field,give it has passport on it

7.select visible for all profiles in field level security and select page layout in next page and save it

MILESTONE-4 APP

App in salesforce are a group of tabs that help the application function by working together as unit. it has a name, logo and a particular sets of tabs.
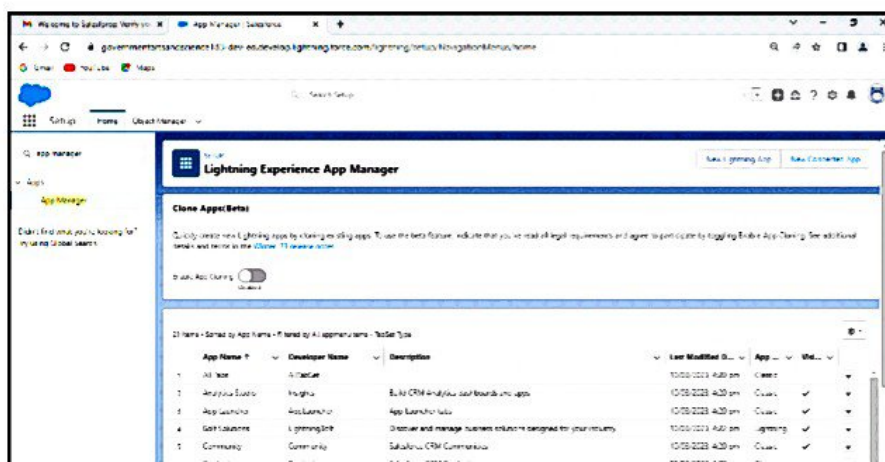
1.standard apps

2. custom apps

ACTIVITY:

CREATION OF APP

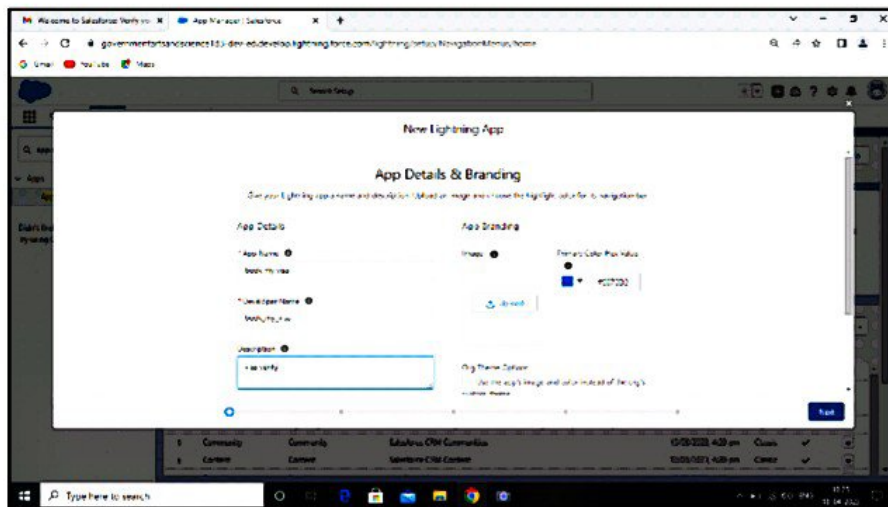An app is a collection of items that work together to serve a particular function

1.Navigate to setup and search for app manager
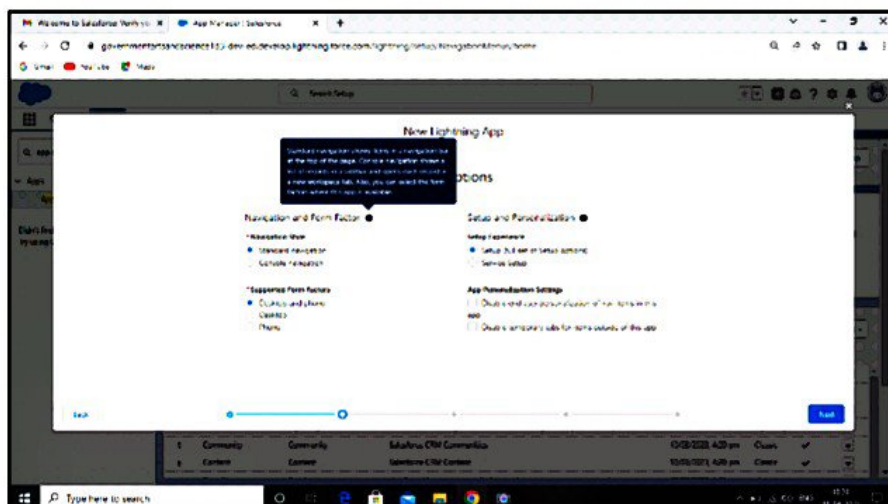
2.And select an option for a new lightning app

3.Give the app namehas book my visa

4.Upload the picture and click next

5.Choose the app option as navigation style – standard navigation support from factors-desktop & mobile and select items
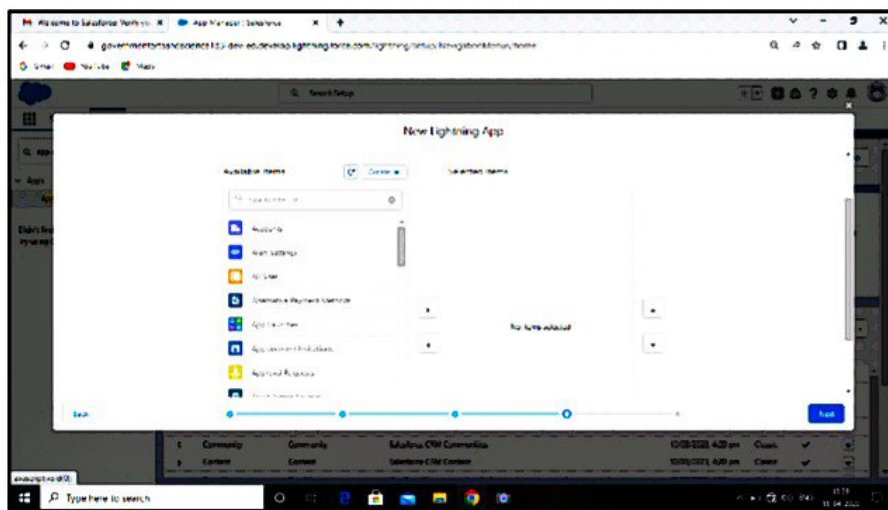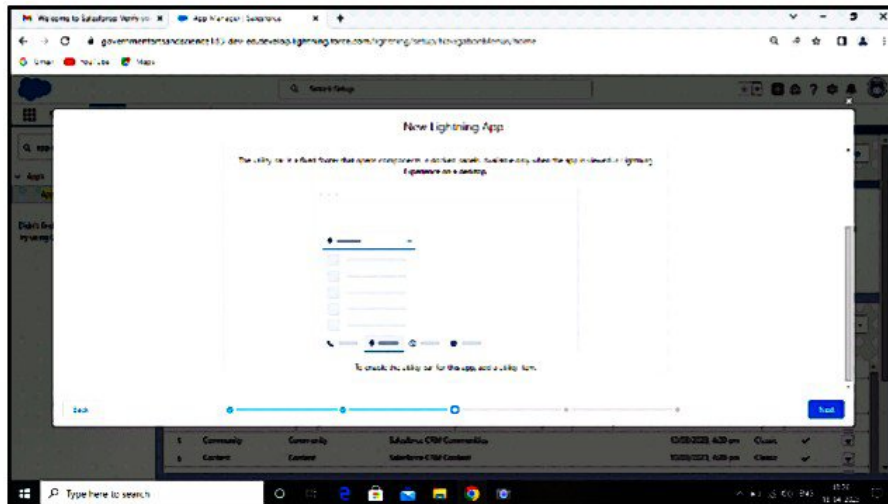
6.And move the objects from available items to selected items.

7.passport,visa   slots,payments reschedule/cancel to selected items

8.And system admin profile to available items to selected items

8. And system admin profile to available items to selected items
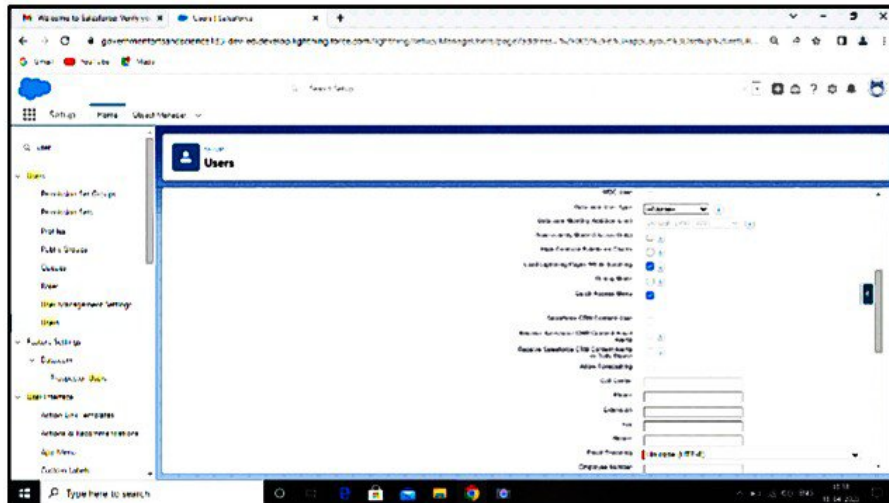

MILESTONE-5 USER

A user is anyone who logs into salesforce . users are employees at your company,such as sales rep,managers,and IT specialists, who need to access to the company's record.every user in salesforce has a user account

ACTIVITY -1

CREATION OF USER

1. Navigate to setup in quick field search
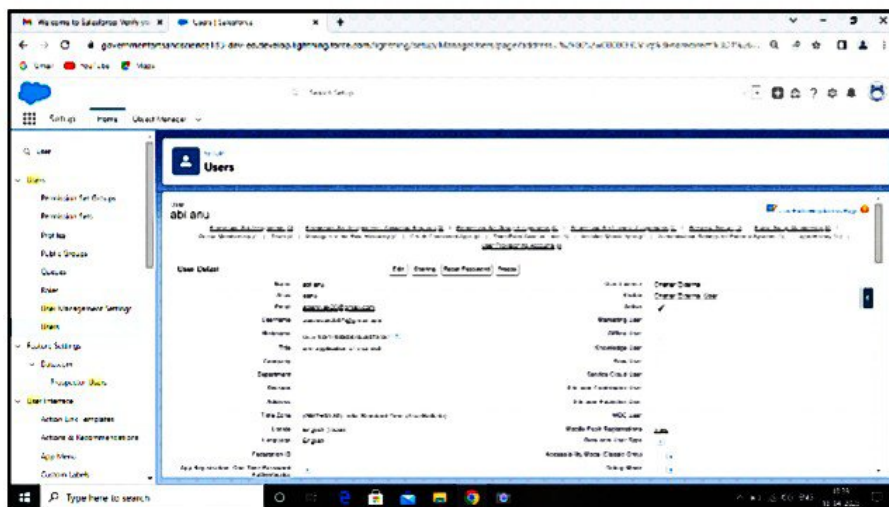
2.type user in and select it and click on new user

3.Give the first name and last name

4.Enter your Email in the Email field

5.Enter username, it must be unique
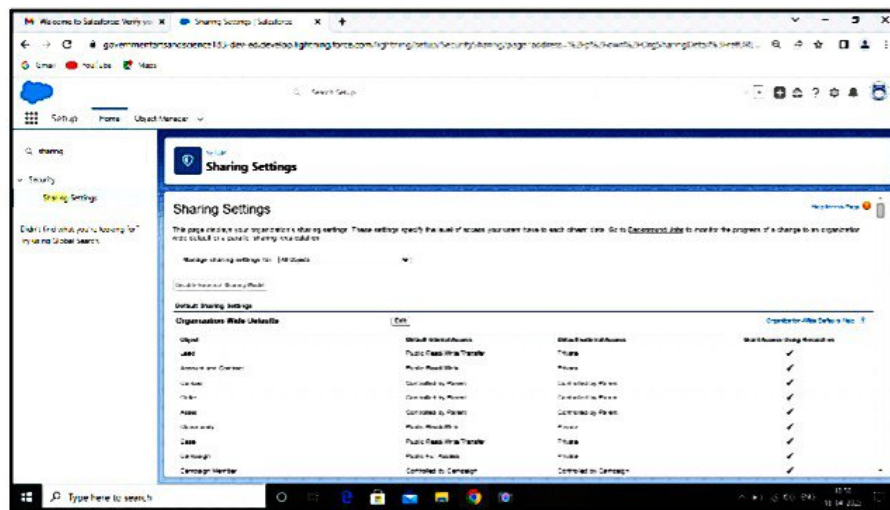

6.Select the user license of salesforce

7.In the profile field select standard user

8.At the bottom of the page check the box to generate a new password and notify the user immmediatly

ACTIVITY-2

OWD- Organization wide default settings

this can be used to give permissions to the organizations wide and it can be used for restrict the access

1.Navigate to setup in quick find search bar

2.Type sharing settings and you will navigate to the sharing setting page

3.Go down to the page and selewct owd

4.And click edit on the owd

5.Navigate to the bottom of the page and

5.Navigate to the bottom of the page and select the passport object

6.And change the default external access to public/read/write

MILESTONE-6 REPORTS

A report is a list of records that meet the criteria you define.its displayed in a salesforce in rows and columns and can be filtered gruoped or displayed in a graphical chart
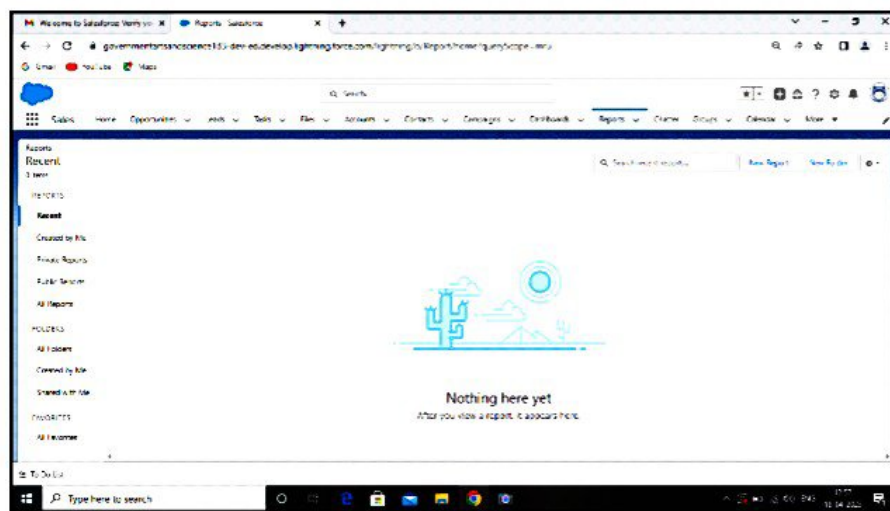
ACTIVITY-1

CREATION OF REPORT

1.click on the app launcher and search for objects

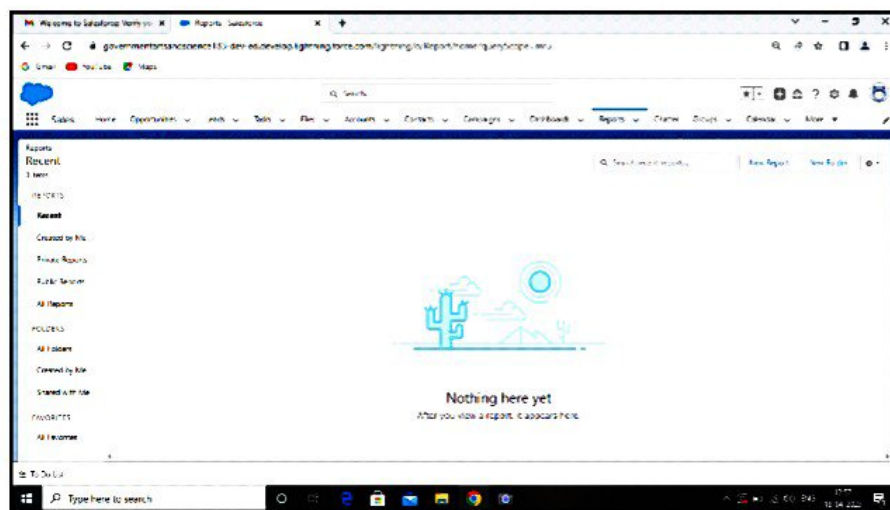2.select a new report for the record type category select other reports

3.select passport with visa slots for the report type name

4. select the start button to create a new report

5.at the left side of the report you can find an outline pane.

6.in the group rows select location
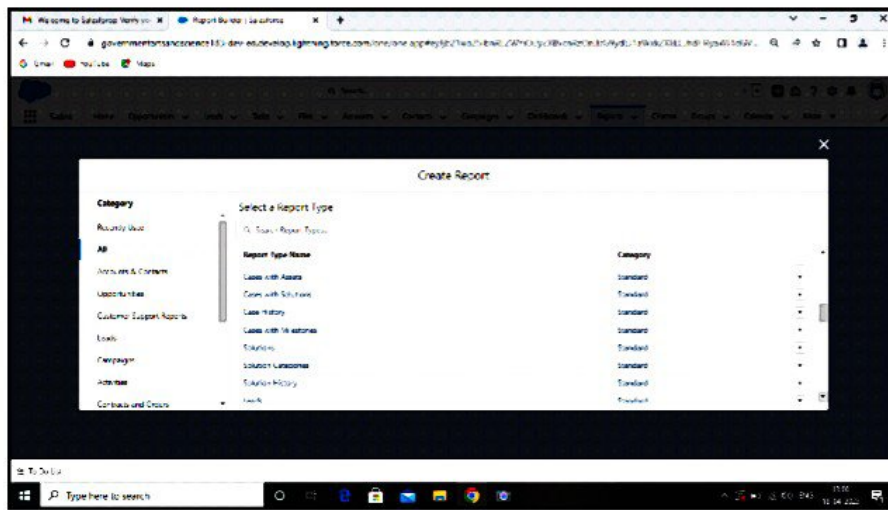

7.in the group columns select passport :passport number to display

8.And in columns select visa slot number

9.now navigate to the filter pane available next to the outline pane and ensure in the show me section all passpoirts is selected

10. And in the passport created date selecte all time

11. And give the label name passport with visa locations

12. click on save and run for saving the report
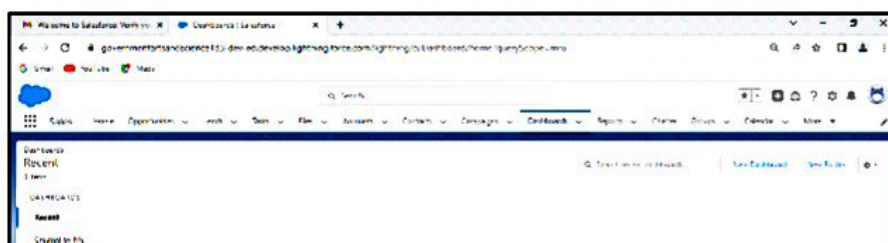

MILESTONE -7 DASHBOARDS

Dashboard in salesforce are a graphicalk representation of reports

ACTIVITY

CREATION OF DASHBOARD

1. Click on the app launcher and sewarch for dashboards

2. select new dashboard option

10.click on add

11.and save the dashboard

4.TRAILHEAD PROFILE PUBLIC URL

TEAM   LEAD-
https://trailblazer.me/id/sounm10

TEAM   MEMBER   1-
https://trailblazer.me/id/aabinaya10

TEAM   MEMBER   2-
https://trailblazer.me/id/vvinothini1

TEAM   MEMBER   3-
https://trailblazer.me/id/anusiyannadurai

TEAM   MEMBER   4-
https://trailblazer.me/id/psathya28

ADVANTAGES AND DISADVANTAGES

ADVANTAGES

1.improved   informational organization

2.CRM for enhanced communication

3.great efficiency

DISADVANTAGES

1.ITS COST EFFICIENCY

2.dependent on proper set up

3.a waste of time if used incorrectly

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6.APPLICATION

1.Tracking customers

2.collecting data for marketing

3.store customer data such as user bahaviour

7.CONCLUSION

Sales force is your customer service platform ,designed to help that you service,market,analyze and connect

8.FUTURE SCOPE

salesforce is a game changing technology with a host productivity boosting features