

Project Report Template

1 INTRODUCTION

1.1 Overview:

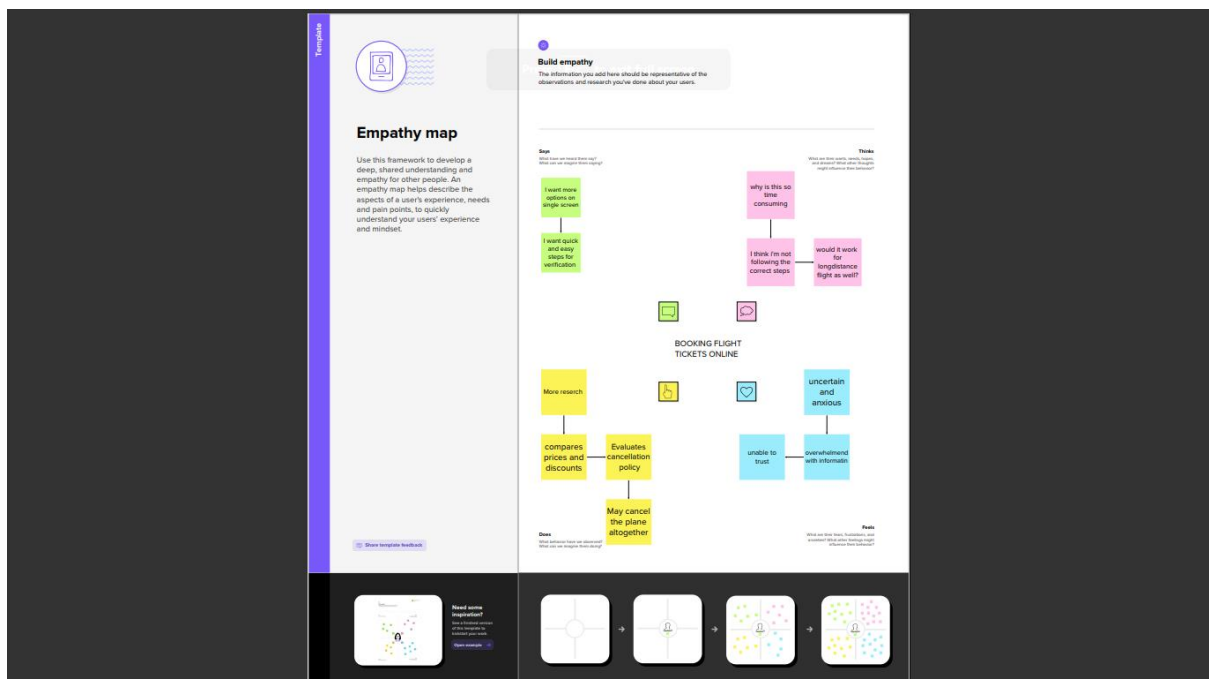
The Creating Salesforce Developer Org is the first step of Project activity and Create username and password is mainly to enter salesforce.com . There are 7 milestone and 9 activities milestone 1 is a creation of organisation milestone 2 has create four objective then the four objective used in customer objects milestone 3 creation of relationship in the relationship between passport and visa milestone 4 has creating the app there are two apps and use the first coustom app milestone 5 has create the user account then search shareing setting in passport object convert to public read and write and milestone 6 create the report then milestone 7 has creating the tashboard finished then summited gitup

1.2 Purpose:

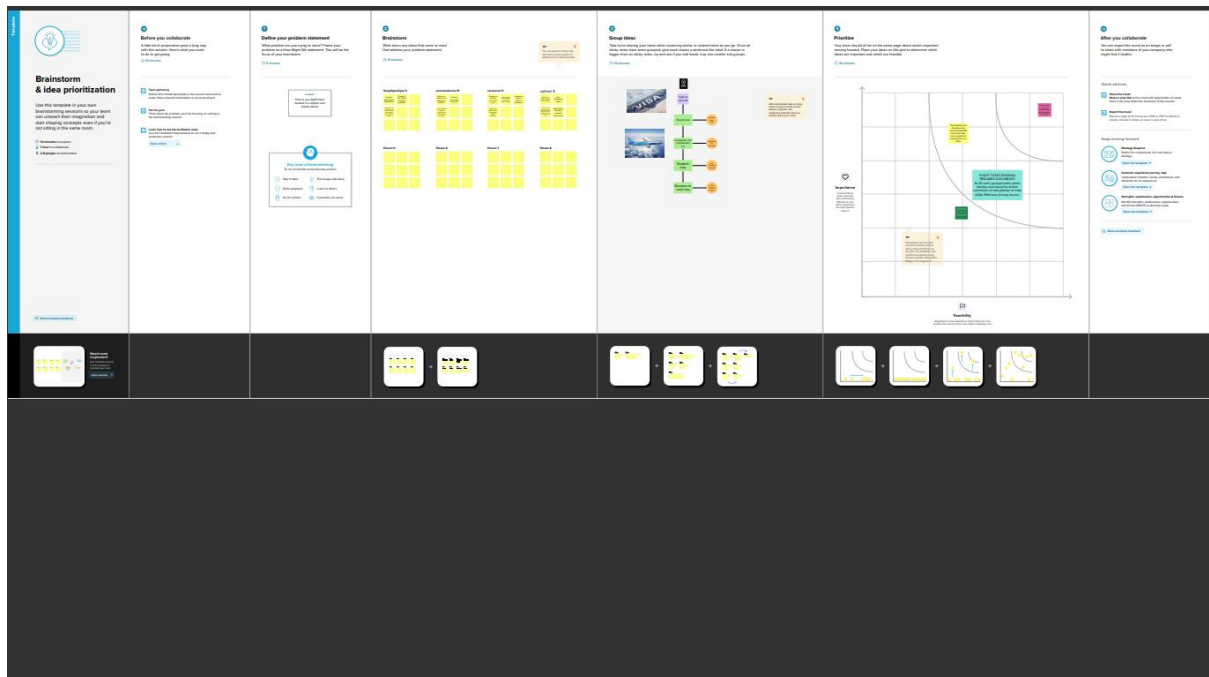
CRM application that helps to book visa slot has used to make passport easy and fast and in this application has low cost and the coustomer has more comfort to use use this apply to visa

2 Problem Definition & Design Thinking

2.1 Empathy Map:



2.2 Ideation & Brainstorming Map



3 RESULT

3.1 Data Model:

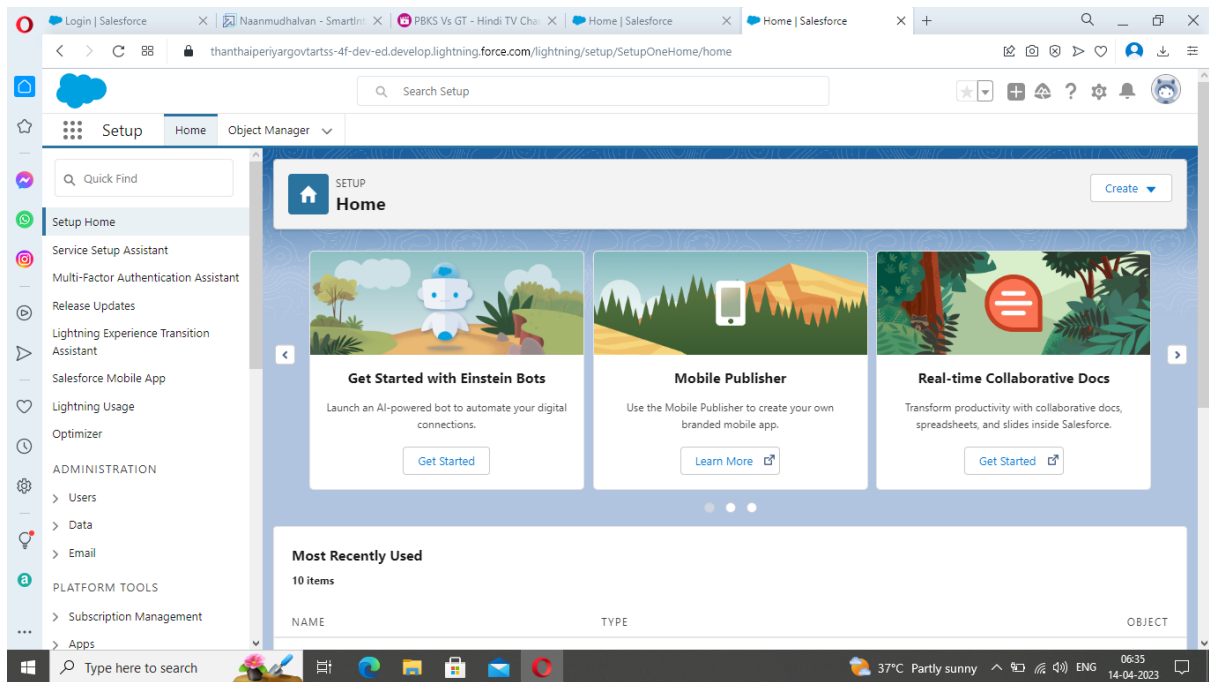
Object name	Fields in the Object	
Purpose	Field Lable	Data Type
	Contact Number	Number
	Full Name	Text
	Passport Number	Text
	Perment Address	Text

Visa Lot	Field Lable	Data Type
	Location	Text
	Time	Text
	Visa Slot Number	Text
	Passport Number(Master)	Master Detail Relationship
Payment	Field Lable	Data Type
	Payment Mode	Text
	Card Number	Number
	Tranraction ID	Auto Number
	Visa Slot Number (master)	Master Detail Relationship
Reschedule	Field Lable	Data Type
	Location	Text
	Time	Text
	Cancel	Text

3.2 Activity & Screenshot

Milstone 1 : Salesforce

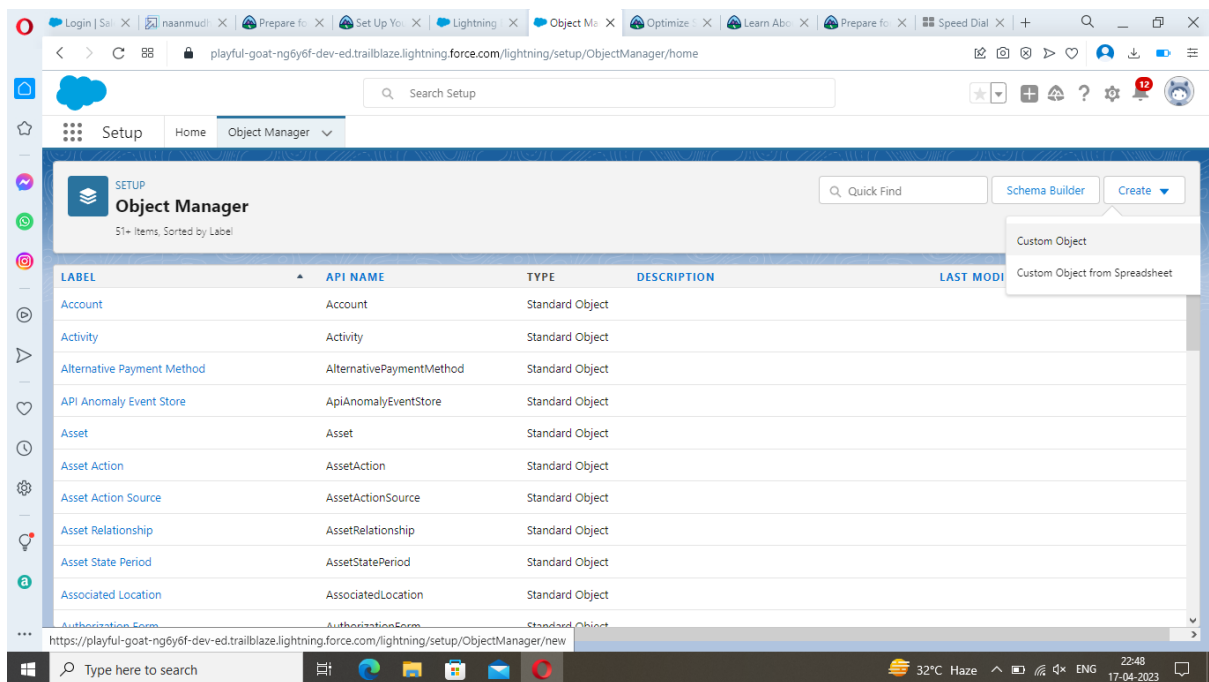
Activity 1:



Description:

- To create an account on salesforce.org.
- After login to Salesforce account enter username and password.
- After login this homepage you will start the project

Activity 2:



Description:

1. Password

2. Visa slot

3. Payment

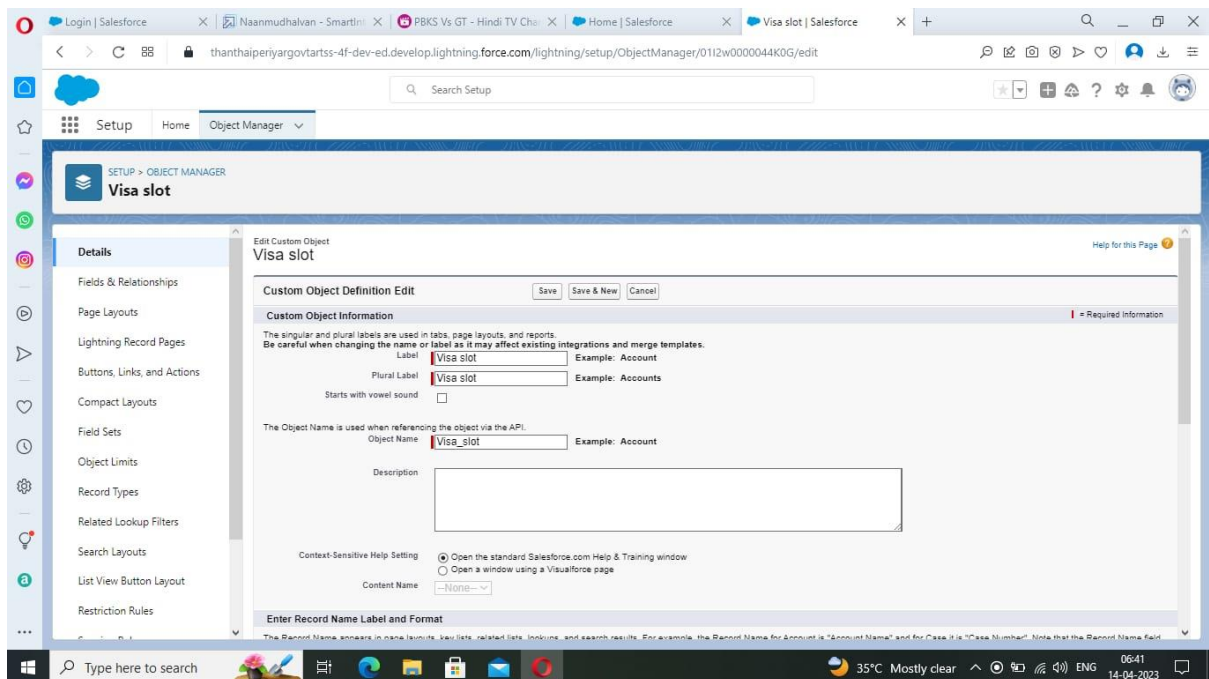
4. Reschedule

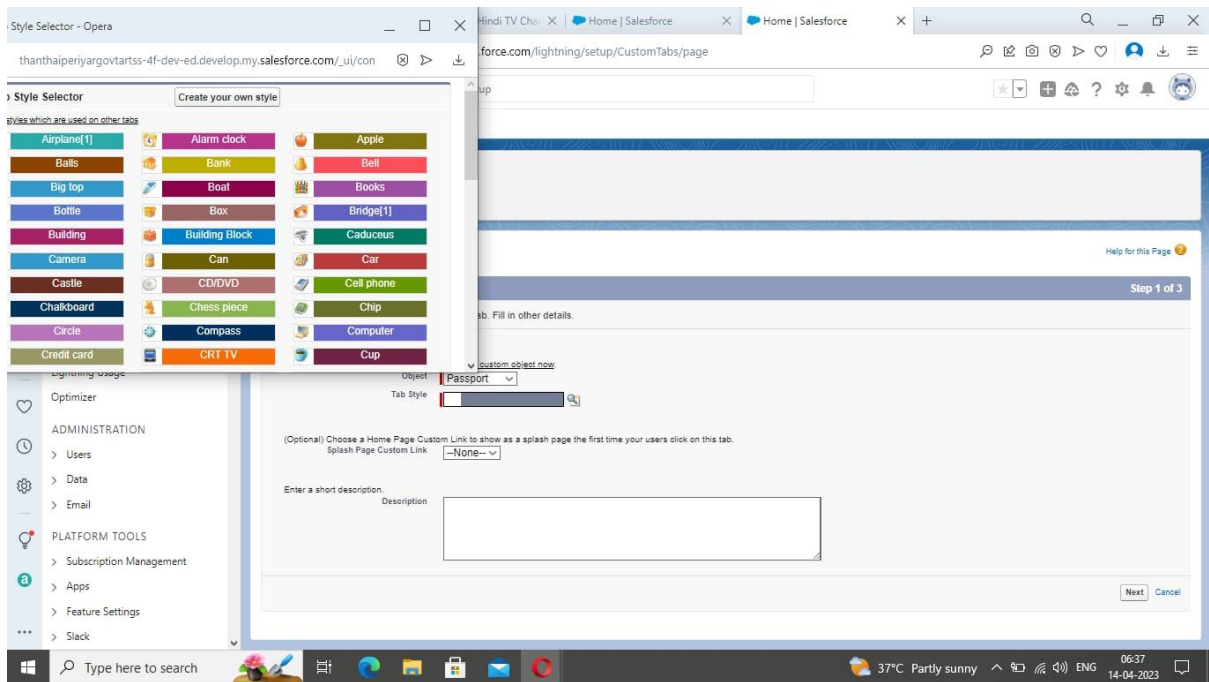
- After check your objects in quick find box.
- On Custom object defining page:
- Enter the label name, plural label name, click on

Allow reports, Allow search → Save.

Milestone 2 - objects

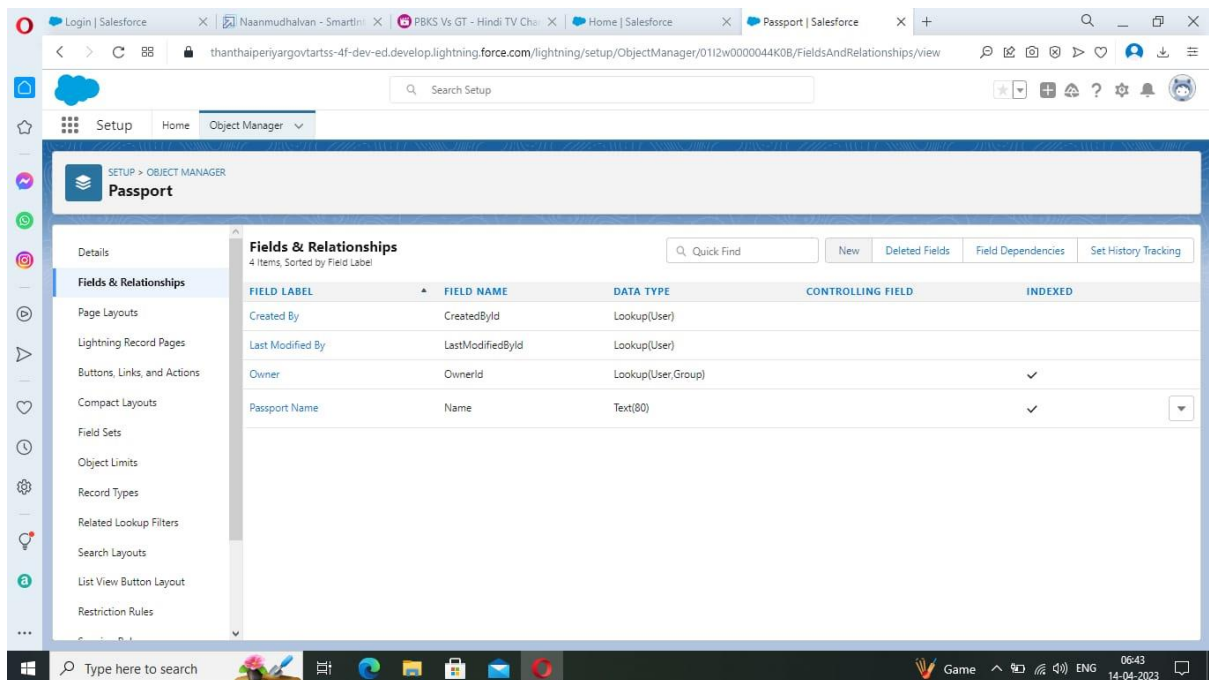
Activity-1:

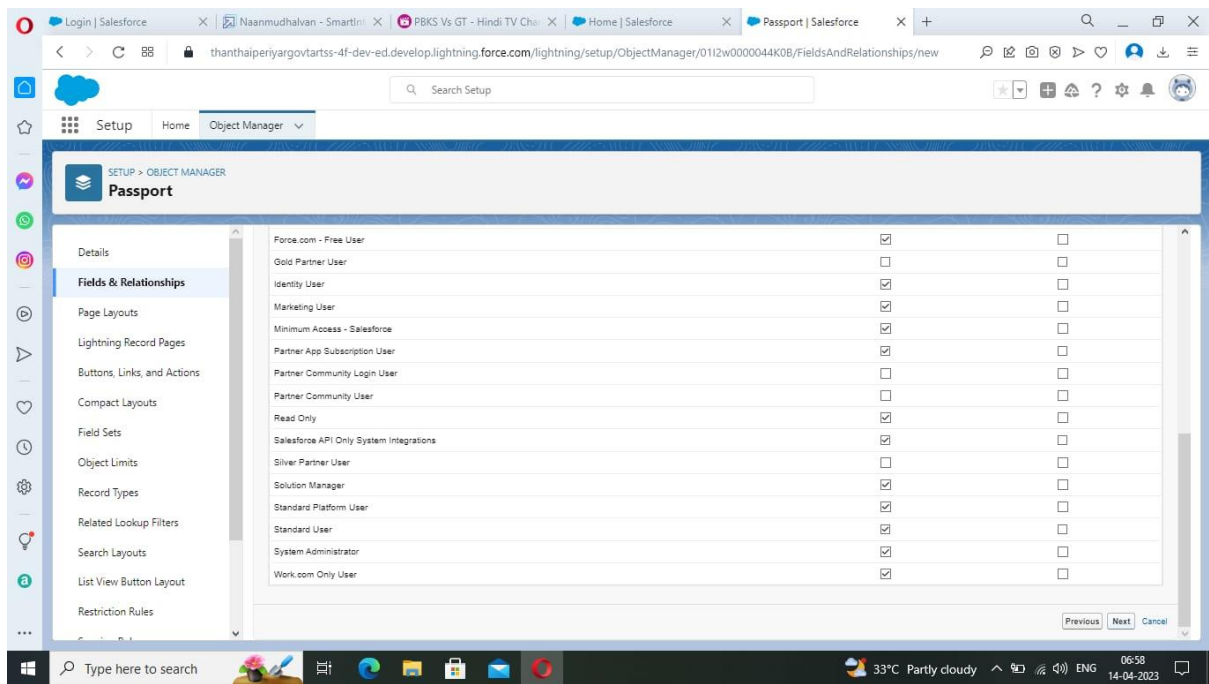
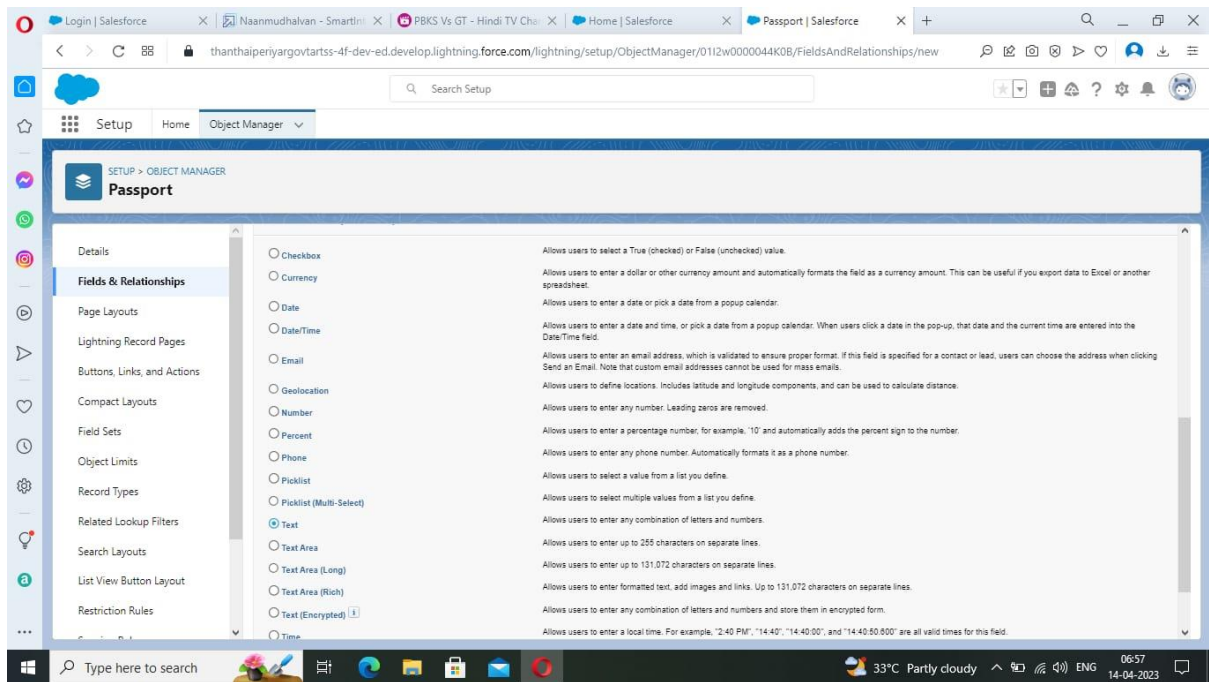




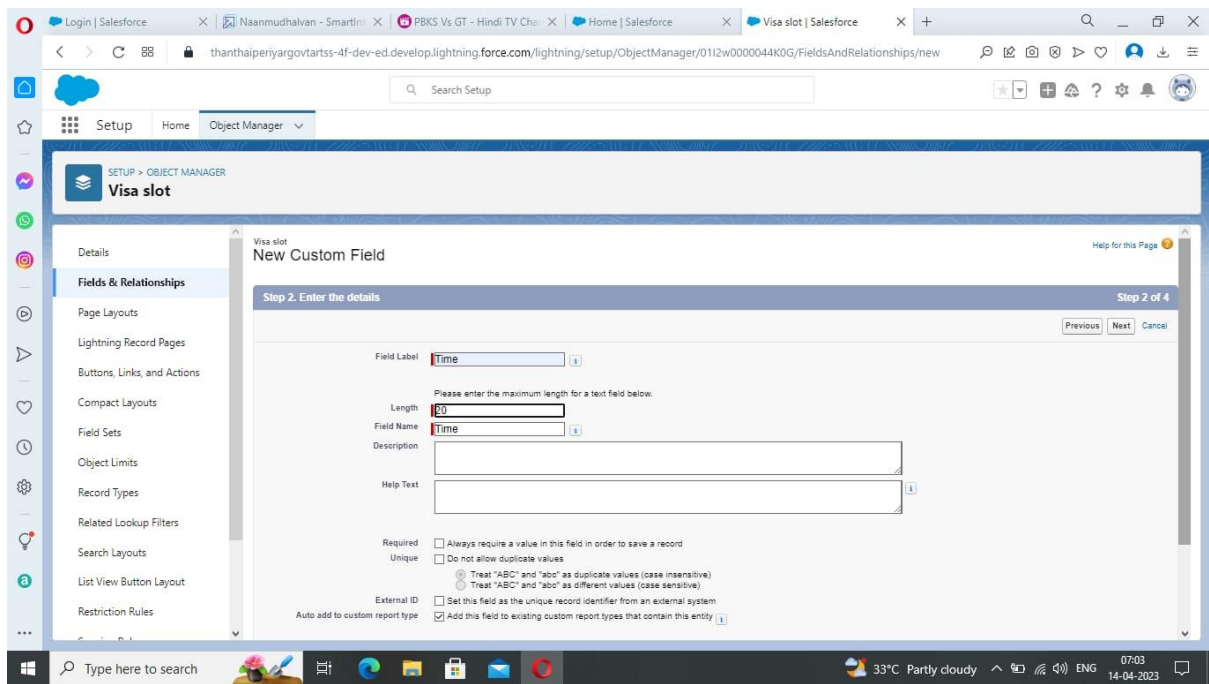
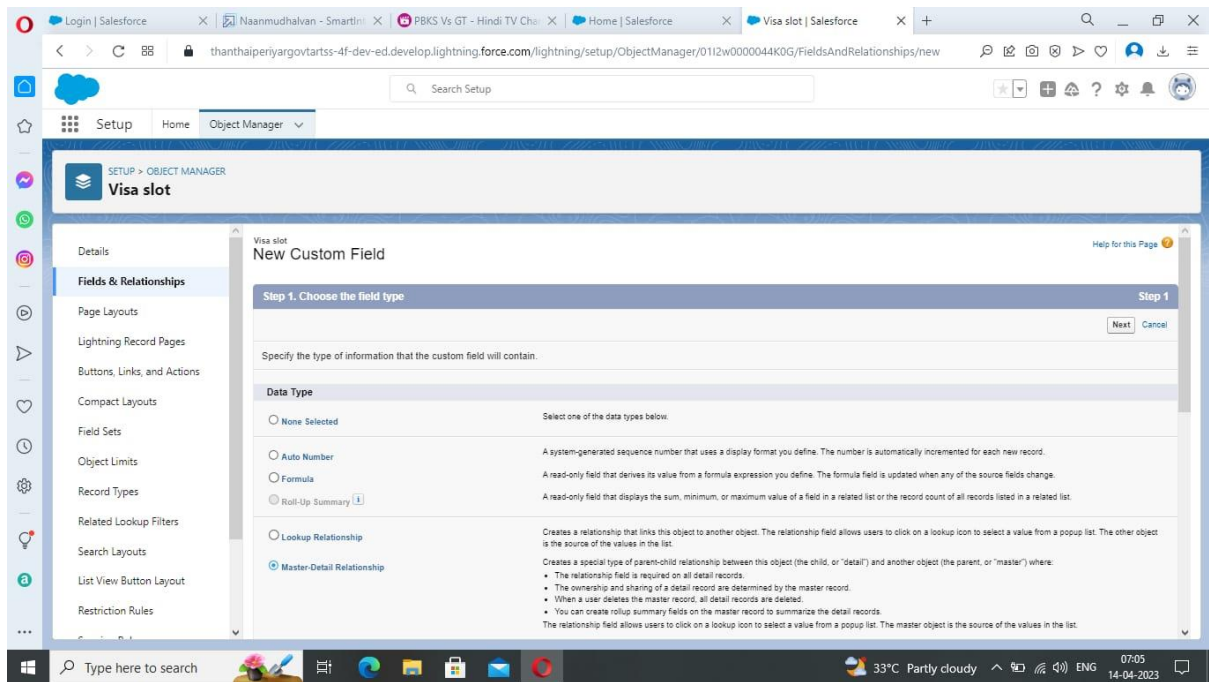
Activity- 2 :

Objects – passport

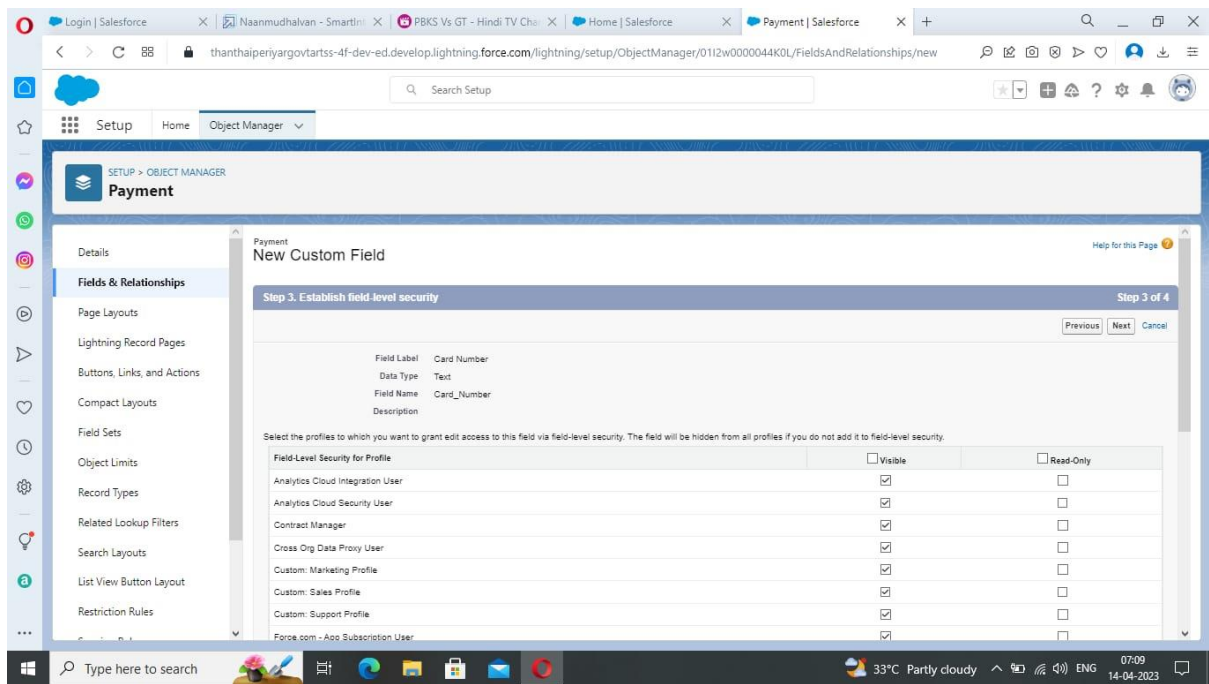
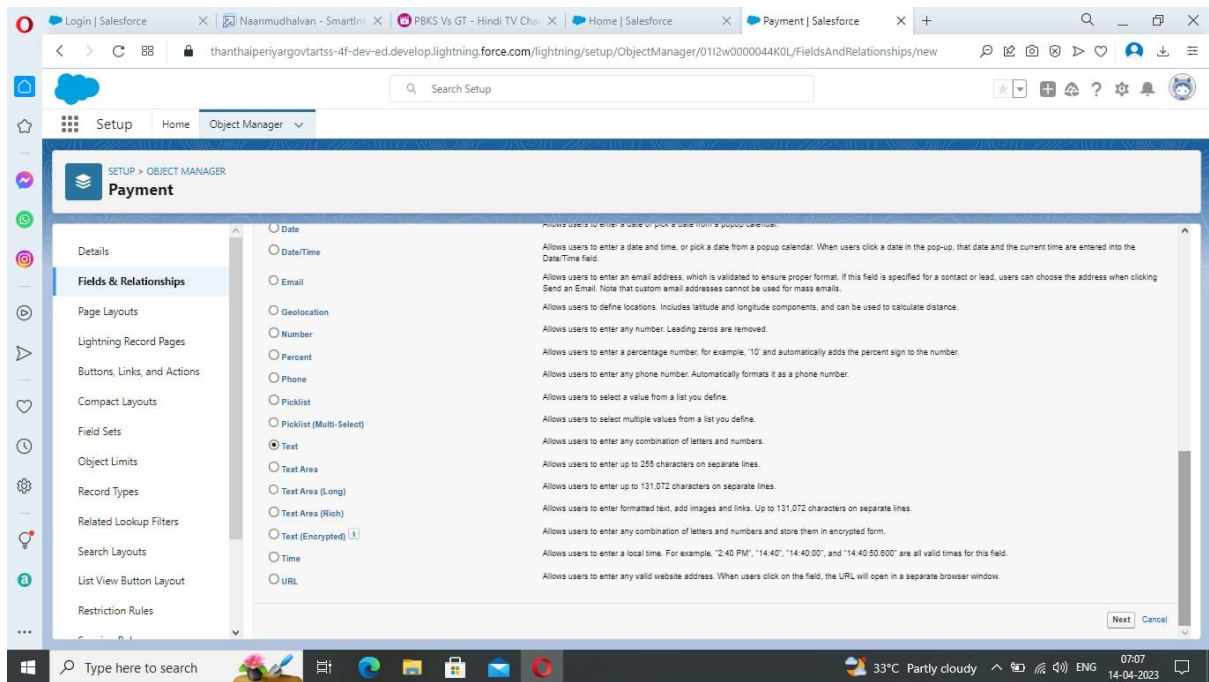




Objects - Visa Slot



Object- Payment



Description:

Create the all objects,

1. Password
2. Visa slot
3. Payment
4. Reschedule

- After check your objects in quick find box.
- On Custom object defining page:
- Enter the label name, plural label name, click on

Allow reports, Allow search → Save.

Milestone- 3 Relationship between objects

Activity-1 : Creation of relationship

Setup > OBJECT MANAGER
Visa slot

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

Specify the type of information that the custom field will contain.

Data Type

☐ None Selected Select one of the data types below.

☐ Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

☐ Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

☐ Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

☐ Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

☒ Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

☐ External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Setup > OBJECT MANAGER
Visa slot

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

Edit Visa slot Custom Field
Passport

Have feedback on lookup filters? Comment on IdeaExchange! Help for this Page

Custom Field Definition Edit Change Field Type Save Cancel

Field Information

Field Label Passport Data Type Master-Detail

Field Name Passport

Description

Help Text

Data Owner User

Field Usage --None--

Data Sensitivity Level --None--

Compliance Categorization Available Chosen

Available
PII
HIPAA
GDPR

Description:

Objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types: 1) Standard objects.

2) custom objects.

Objects involved in Book my visa are:

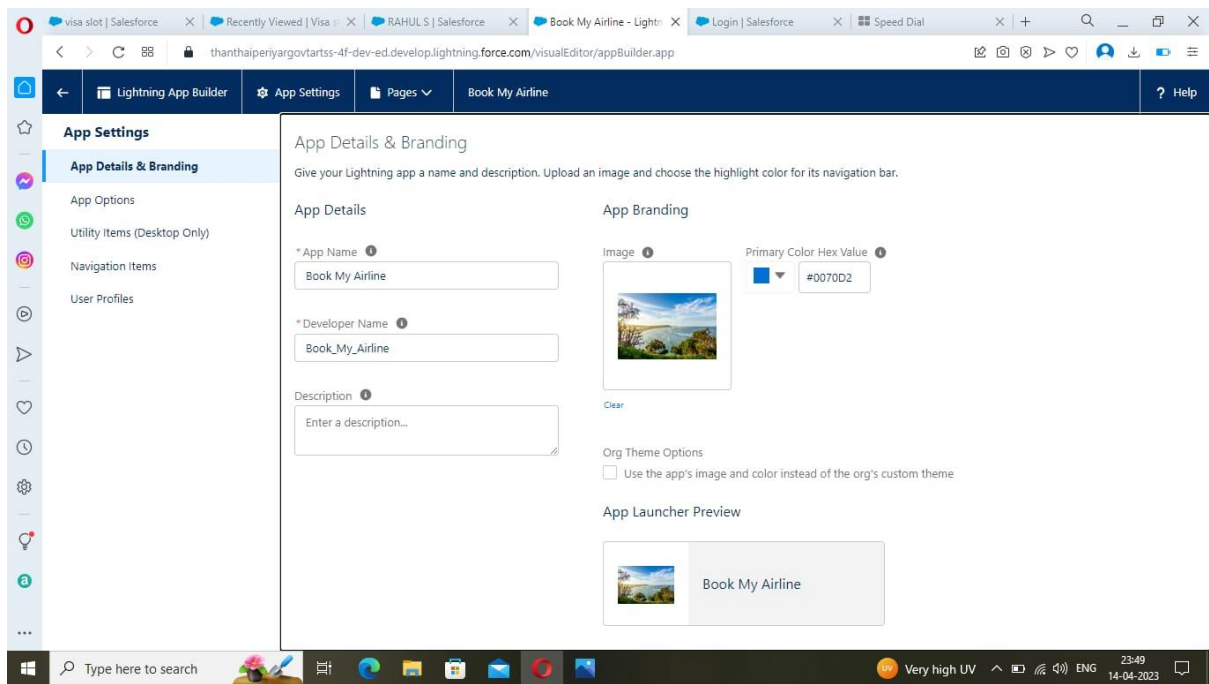
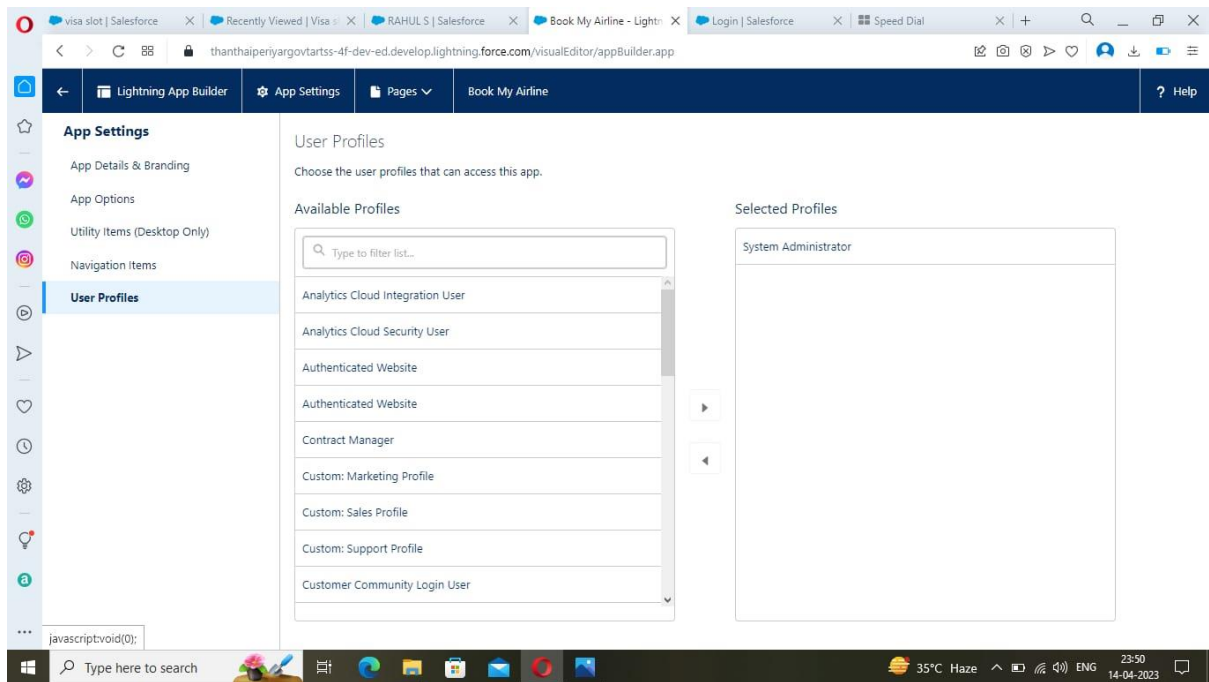
Objects	Passport	Visa slot	Payment	Reschedule/Cancel
Fields	Full name	Location	Payment Mode	passport number(Master)
Fields	Passport number	Time	Card Number	Location
Fields	Contact number	Passport number (Master)	Transaction id (Auto number)	Time
Fields	Permanent address	Visa slot number	Cancel Transaction	Cancel
			Visa slot number(Master)	Status

Milestone-4 App

Activity-1: Creation of App

The screenshot displays the Salesforce App Manager interface. The left sidebar shows the navigation menu with options like Service Setup, Home, Object Manager, and App Manager. The main content area shows a list of 22 items, sorted by App Name. The list includes items like All Tabs, Analytics Studio, App Launcher, Bolt Solutions, Book My Airline, Community, Content, Data Manager, Digital Experiences, and Lightning Usage App. Each item has columns for App Name, Developer Name, Description, Last Modified, App Type, and Visibility. The 'Book My Airline' item is highlighted.

App Name	Developer Name	Description	Last Modified	App Type	Visibility
1 All Tabs	AllTabSet		22/02/2023, 2:00 pm	Classic	
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	22/02/2023, 2:00 pm	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	22/02/2023, 2:00 pm	Classic	✓
4 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for y...	22/02/2023, 2:03 pm	Lightning	✓
5 Book My Airline	Book_My_Airline		15/04/2023, 8:42 am	Lightning	✓
6 Community	Community	Salesforce CRM Communities	22/02/2023, 2:00 pm	Classic	✓
7 Content	Content	Salesforce CRM Content	22/02/2023, 2:00 pm	Classic	✓
8 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and m...	22/02/2023, 2:00 pm	Lightning	✓
9 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	22/02/2023, 2:00 pm	Lightning	✓
10 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experie...	22/02/2023, 2:00 pm	Lightning	✓



Description:

- 1) Go to the Set Up option from the Home Page and click on it.
- 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 relationship
- 5) And select related to the object has passport, and click on next

6) You will navigate to the label name page where you give the label name for the field, give it has passport number and click next.

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

Milestone- 5 User

Activity -1: Creation of User

The screenshot shows the Salesforce 'All Users' page. The left sidebar contains the 'Setup' menu with 'Users' selected. The main content area displays a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users, including 'Chatter Expert', 'Indigo Air line', 'S. Sangilpandiyar', 'User Integration', and 'User Security'. The 'User Security' user is highlighted.

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty.00d2v00000gw4v5eaj-fnb51qcmogu@chatter.salesforce.com		✓	Chatter Free User
Edit	Indigo Air line	aindi	qandi@2345@gmail.com		✓	Partner App Subscription User
Edit	S. Sangilpandiyar	SS	sangil@evr.com		✓	System Administrator
Edit	User Integration	integ	integration@00d2v00000gw4v5eaj.com		✓	Analytics Cloud Integration User
Edit	User Security	sec	insightssecurity@00d2v00000gw4v5eaj.com		✓	Analytics Cloud Security User

The screenshot shows the 'User Edit' page for the user 'Sangilpandiyar S'. The page is divided into two main sections: 'General Information' and 'User License'. The 'General Information' section contains fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The 'User License' section contains fields for Role, User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Data.com User Type, Data.com Monthly Addition Limit, Accessibility Mode (Classic Only), High-Contrast Palette on Charts, Load Lightning Pages While Scrolling, Debug Mode, Send Apex Warning Emails, Make Setup My Default Landing Page, Quick Access Menu, and Development Mode.

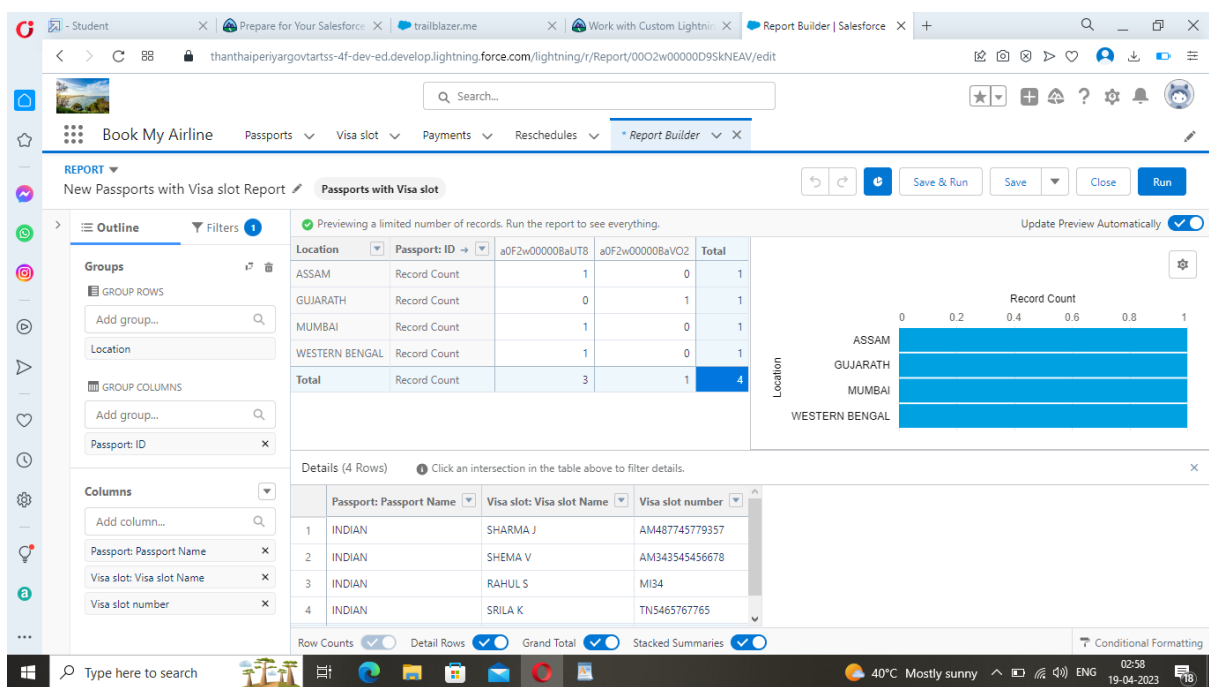
Field	Value
First Name	Sangilpandiyar
Last Name	S
Alias	SS
Email	sangilpandiyar@gmail.com
Username	sangil@evr.com
Nickname	User167705464430374385
Title	
Company	Thanthaipariyargovtarts-4f-dev-ed
Department	
Division	
Role	<None Specified>
User License	Salesforce
Profile	System Administrator
Active	✓
Marketing User	✓
Offline User	✓
Knowledge User	✓
Flow User	✓
Service Cloud User	✓
Site.com Contributor User	✓
Site.com Publisher User	✓
WDC User	✓
Data.com User Type	<None>
Data.com Monthly Addition Limit	100
Accessibility Mode (Classic Only)	✓
High-Contrast Palette on Charts	✓
Load Lightning Pages While Scrolling	✓
Debug Mode	✓
Send Apex Warning Emails	✓
Make Setup My Default Landing Page	✓
Quick Access Menu	✓
Development Mode	✓

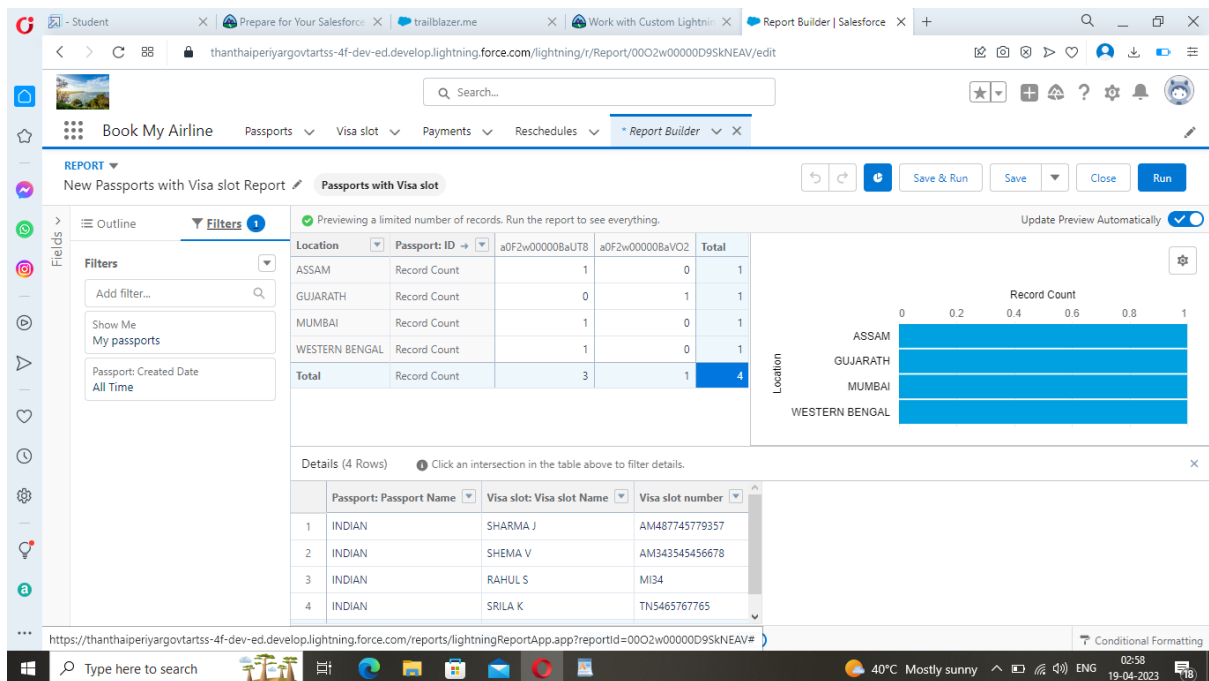
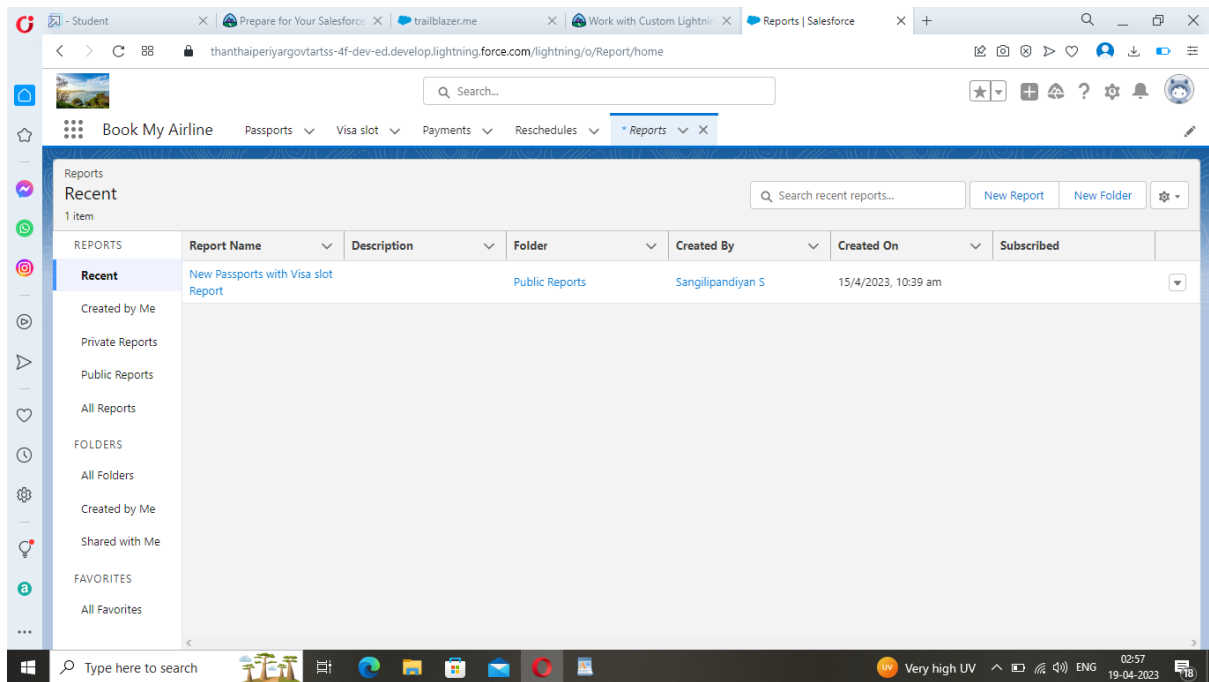
Description:

- 1) Navigate to setup and search for app manager
- 2) And select an option for a new lightning app.
- 3) Give the app name has book my airline.
- 4) Upload the picture and click next.
- 5) Choose the app option as navigation style- standard navigation, support from factors-desktop & mobile and select next.
- 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.

Milestone -6 Reports

activity-1 : Creation Of Report





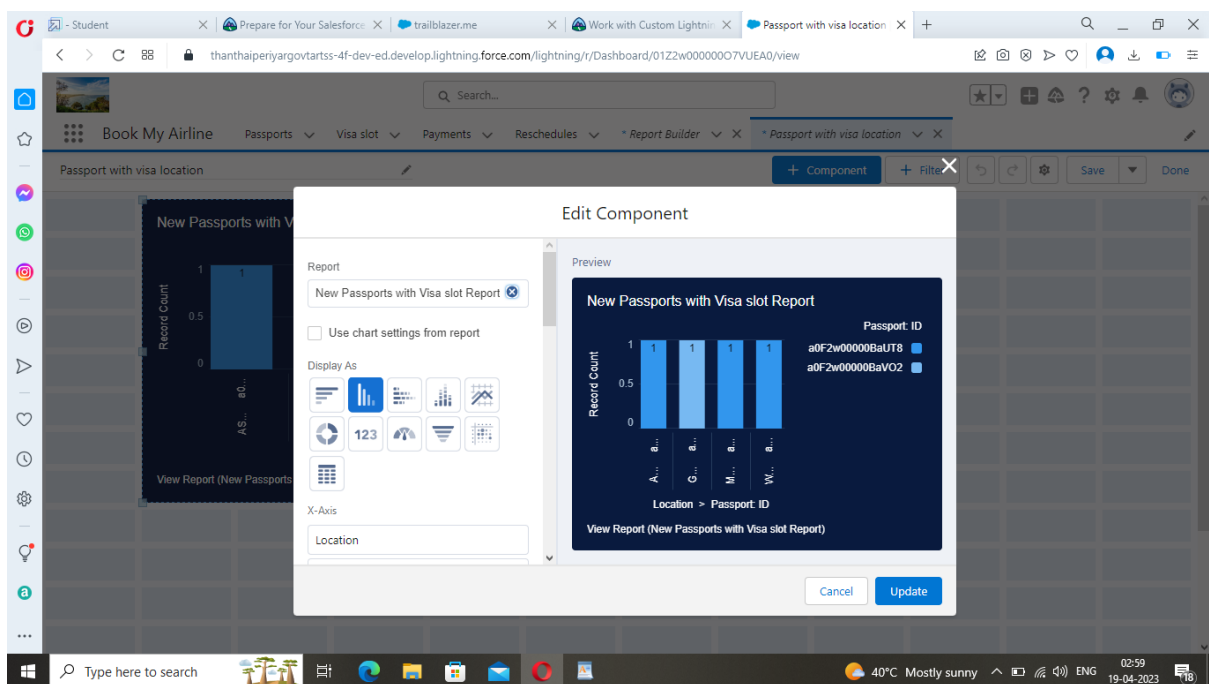
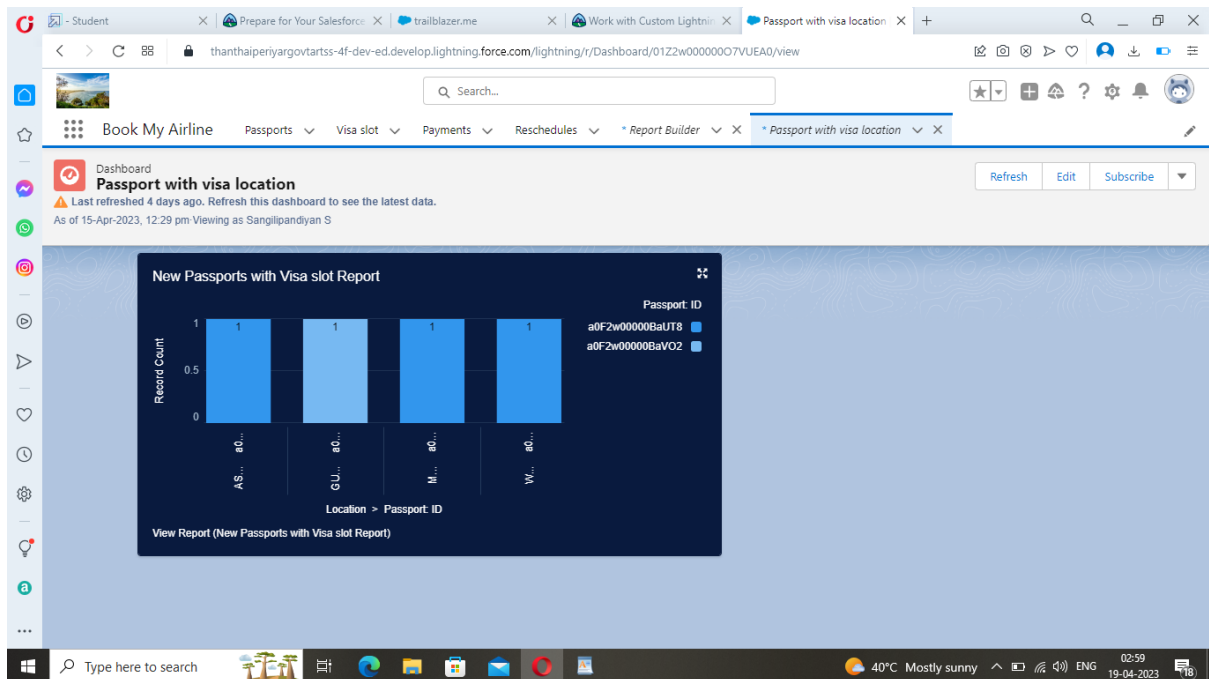
Description:

- 1) Navigate to setup in quick find search bar
- 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.

Milestone-7 Of Dashbord

Activity -1: Creation Of Dashbord



Description:

- Dashboards let you curate data from reports using charts, tables, and metrics.
- If your colleagues need more information, then they're able to view your Dashboard's data-supplying reports
- Given reports are customizing dashboards

4 Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/sangilipandiyan25>

Team Member 1 - <https://trailblazer.me/id/saram335>

Team Member 2 - <https://trailblazer.me/id/sarak149>

Team Member 3 - trailblazer.me/id/sathe145

5 ADVANTAGES & DISADVANTAGE**Advantages:**

- In this application is used to easily apply visa
- This CRM application can fast responsible customers questions
- Very short time to apply visa
- This application is too fast
- It's helpful to improve customer service
- It's used to increase business and reduce cost6 APPLICATIONS
- The areas where this solution can be applied

Disadvantages:

- It's visa solt website is expensive
- It's poor usability of this CRM application
- That has lack of customization
- This application ajas very complexity

7 CONCLUSION

Despite the disadvantages listed above, there are plenty of benefits to using a CRM system in your business. By choosing the right CRM system and taking the time to learn how to use it effectively, you can maximize the benefits that it has to offer. These were the advantages and disadvantages of CRM program and when analyzed the advantages and disadvantages, the advantages outweighs the disadvantages! This means that ultimately a CRM would be very beneficial for a business this are all the conclusion of CRM application of visa solt

8 FUTURE SCOPE

companies will be able to pivot to meet the changing needs and trends — driven by customer expectations. The fundamental purpose of a CRM system is to improve the customer experience. Executing on this objective is the most sure-fire way to see positive results across your business. When you make improved customer satisfaction the main goal for your CRM, all other objectives work to support this goal. CRM software consolidates customer information into a single repository so users can better organize and manage relationships, automates common processes, and provides tools to monitor performance and productivity.