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
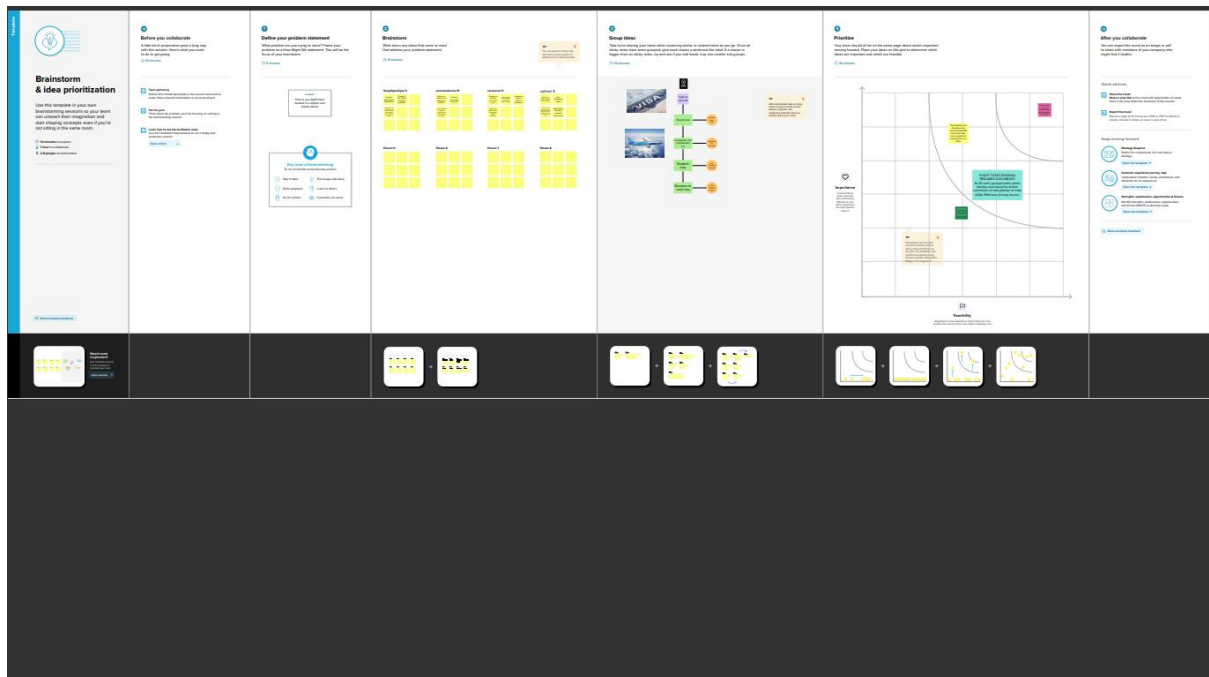
1.2 Purpose:

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:
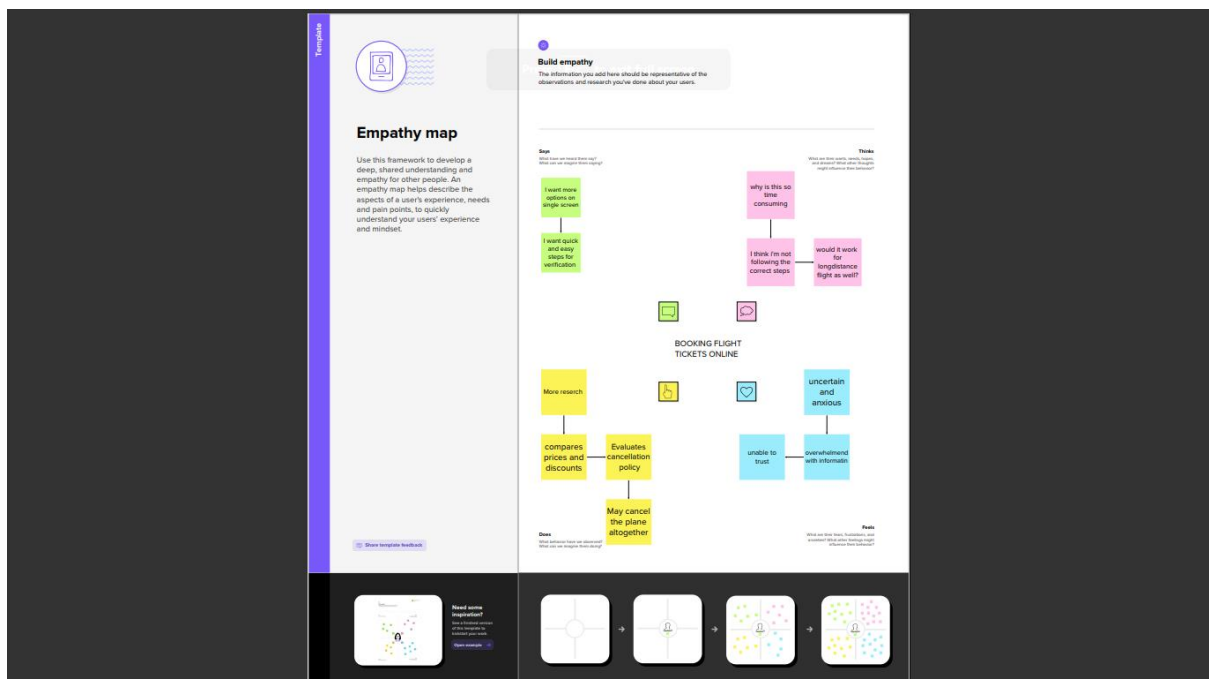
2.2 Ideation & Brainstorming Map

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:
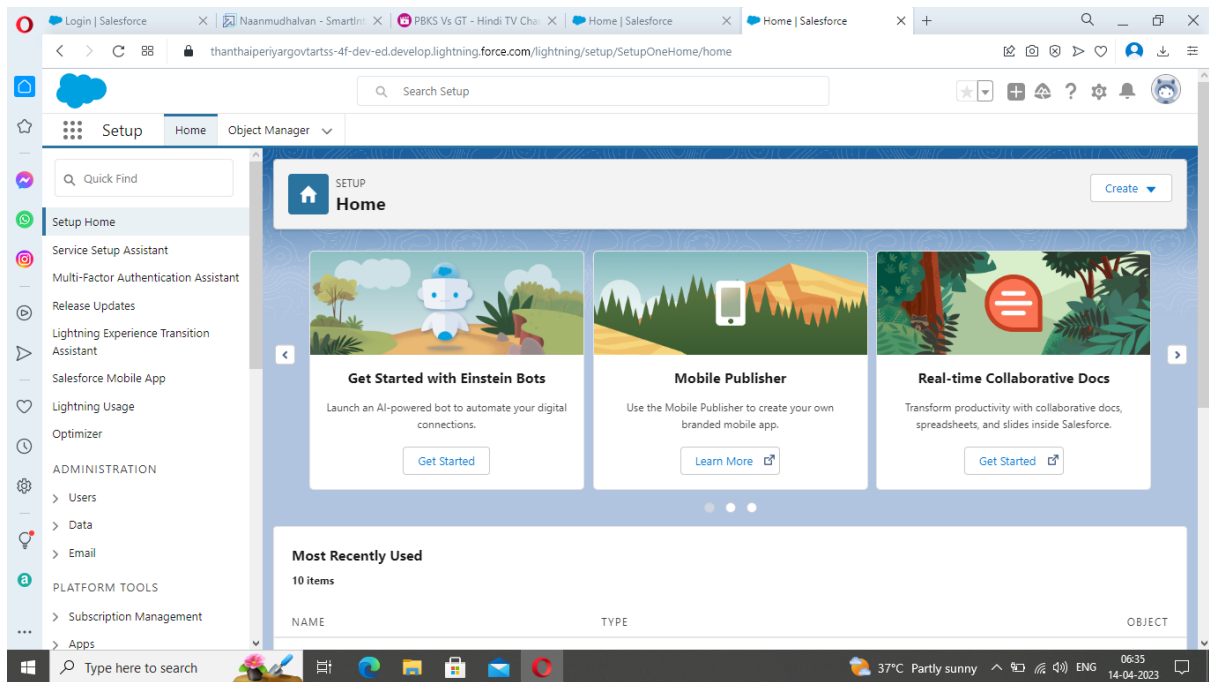
Descrption:

• 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:
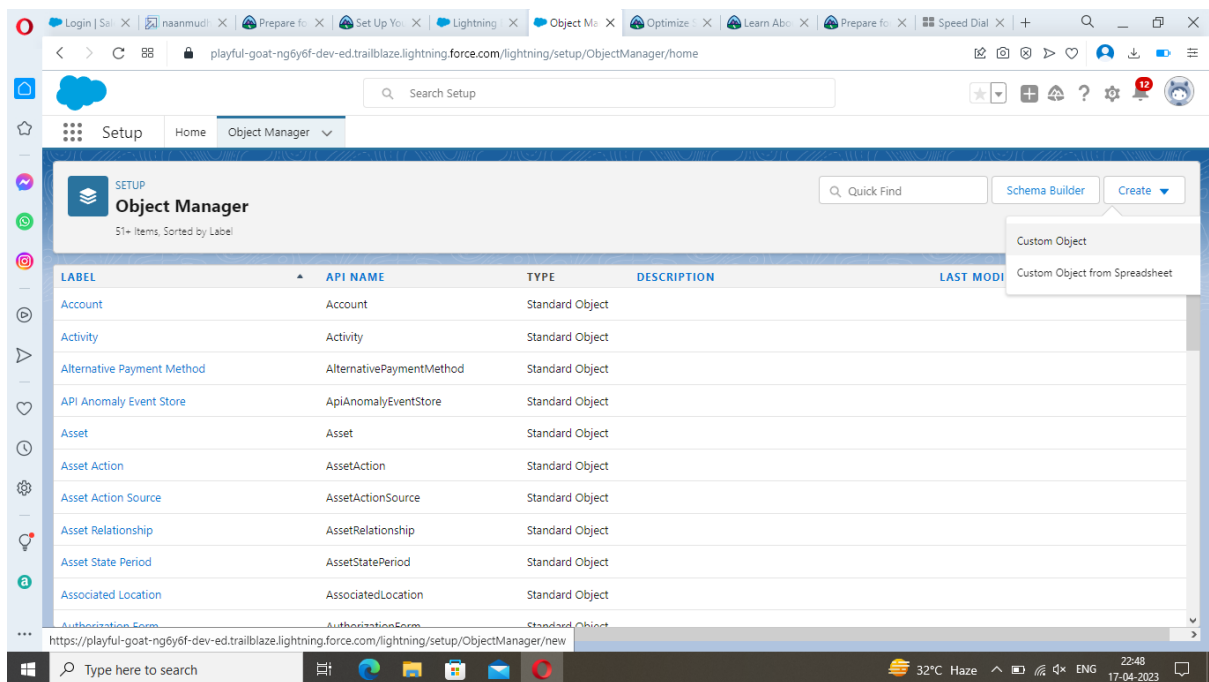
Descrption:

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
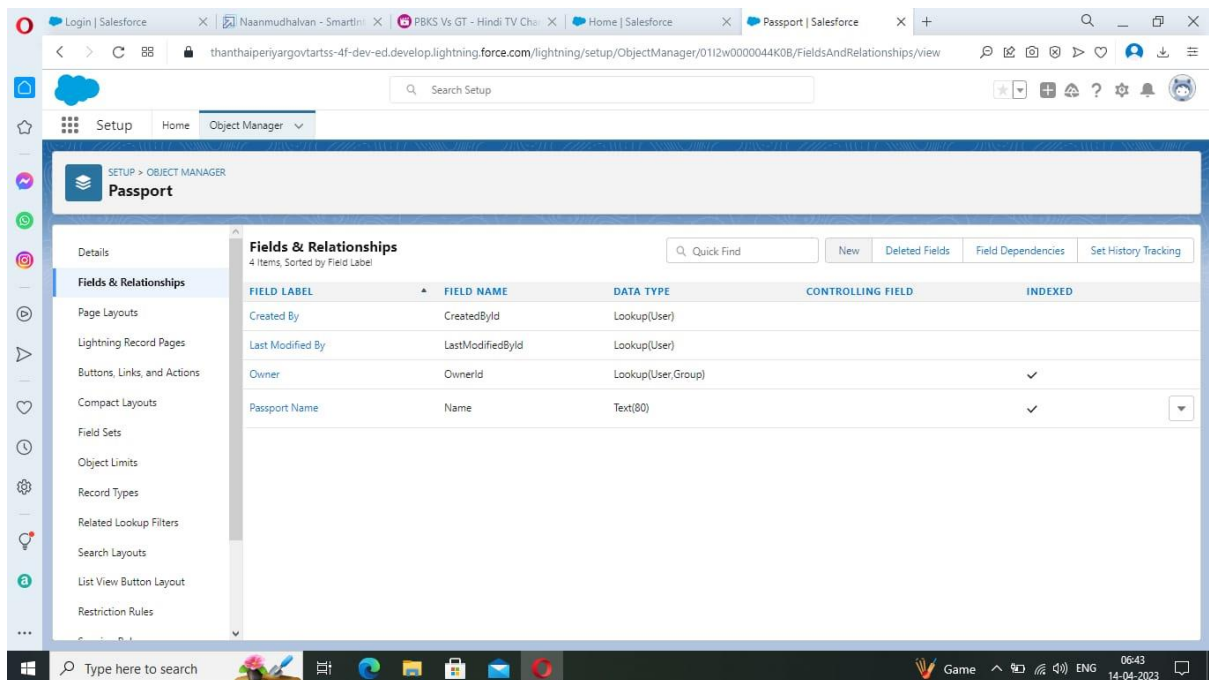
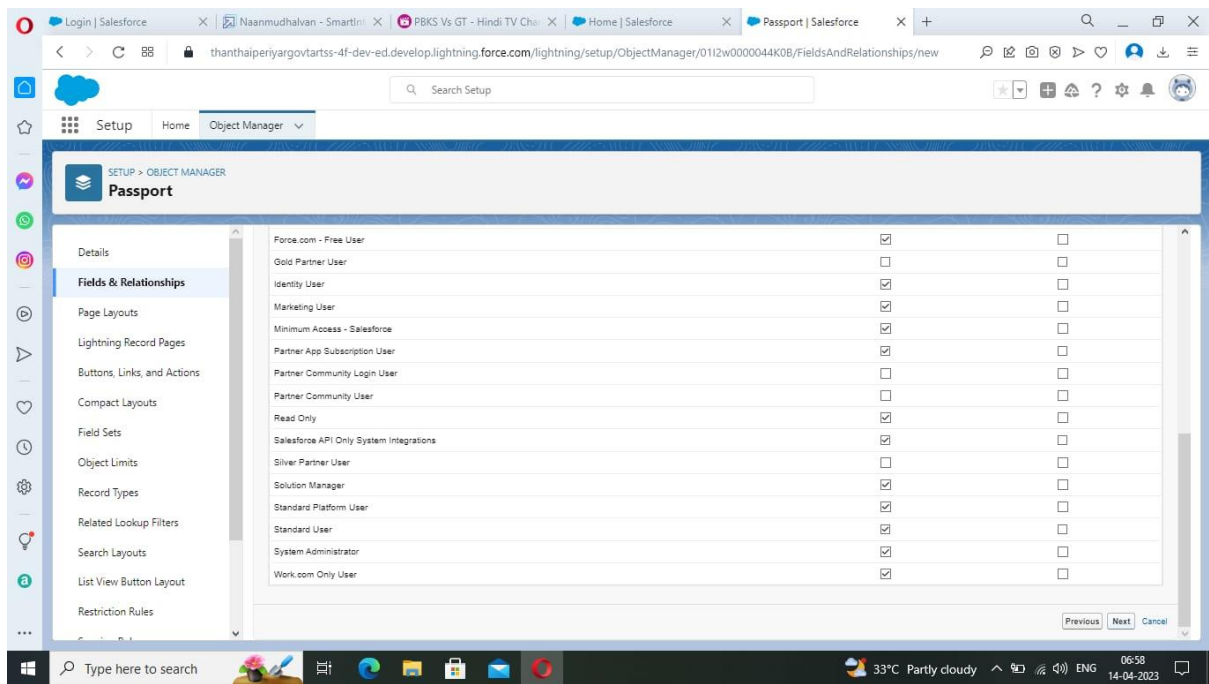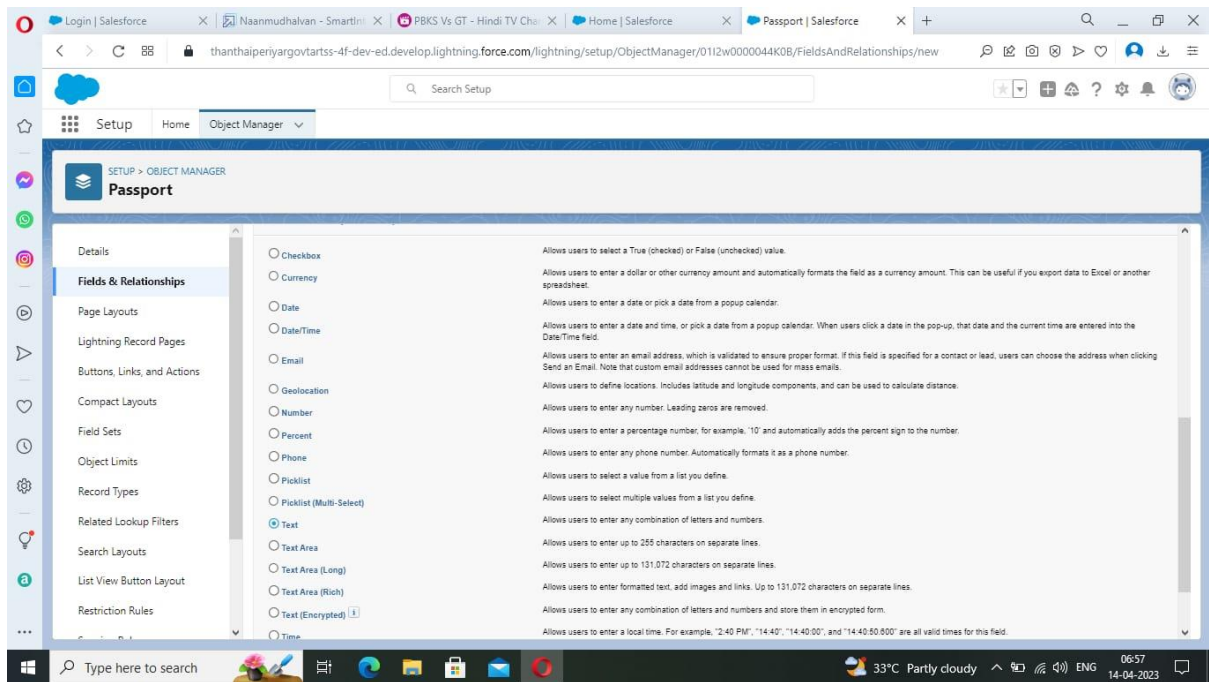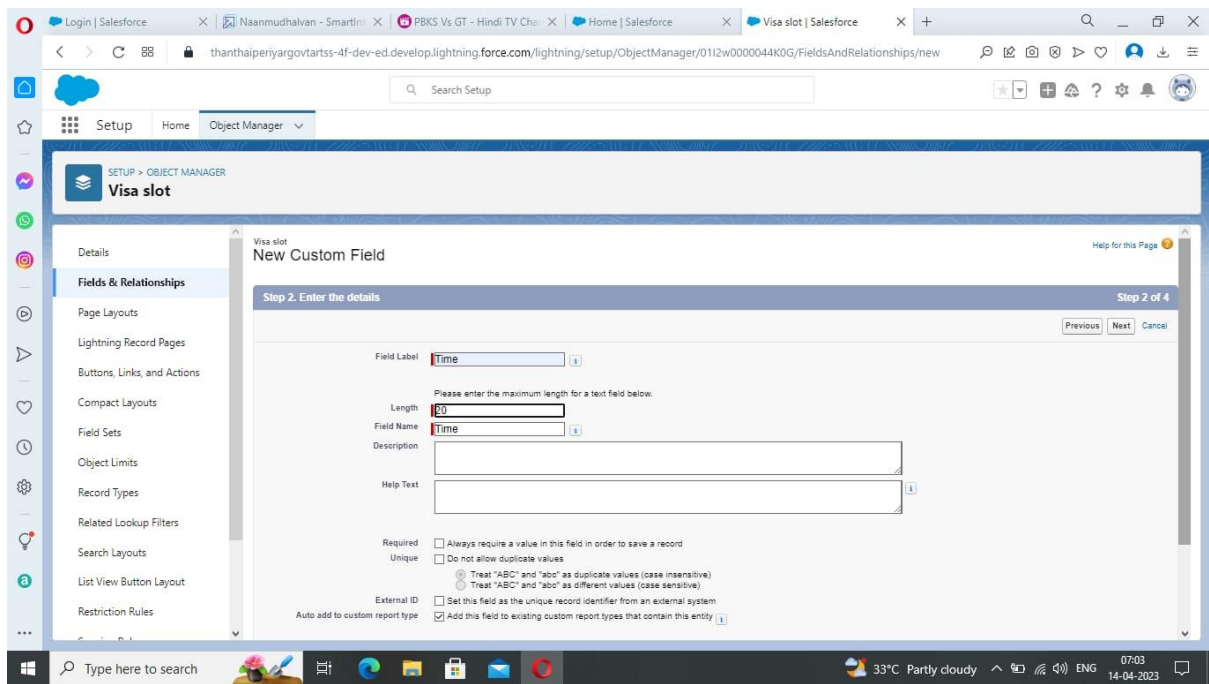Allow reports, Allow search → Save.

Milestone 2 - objects

Activity-1:
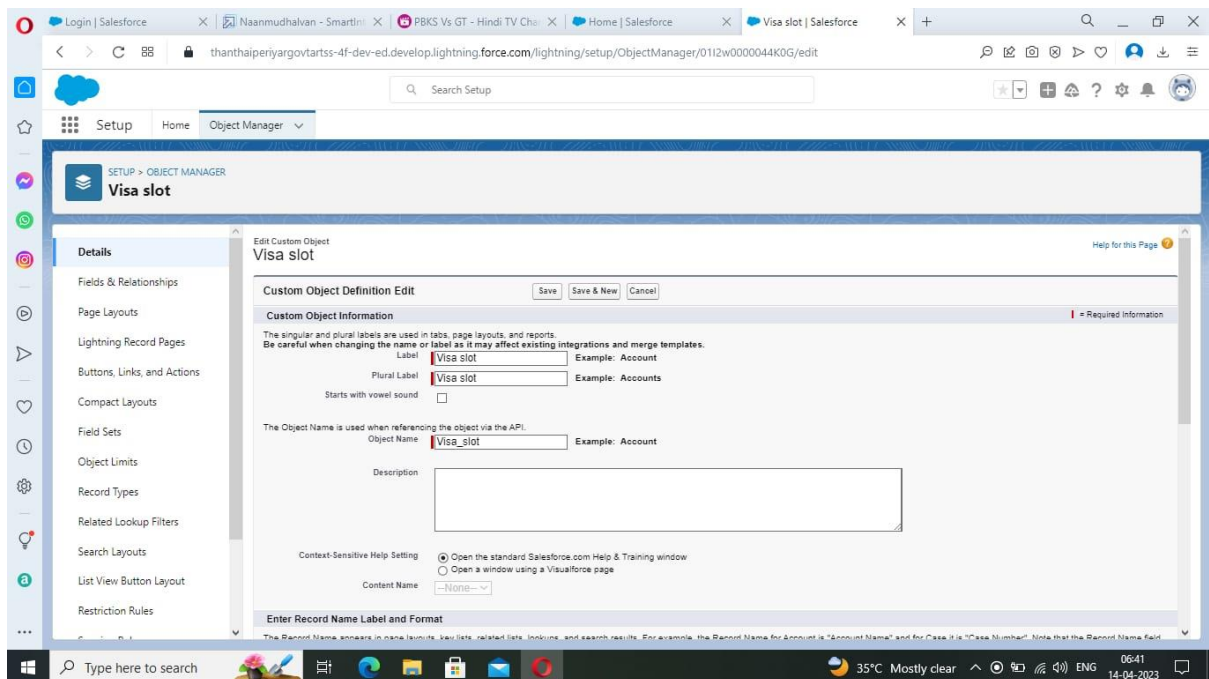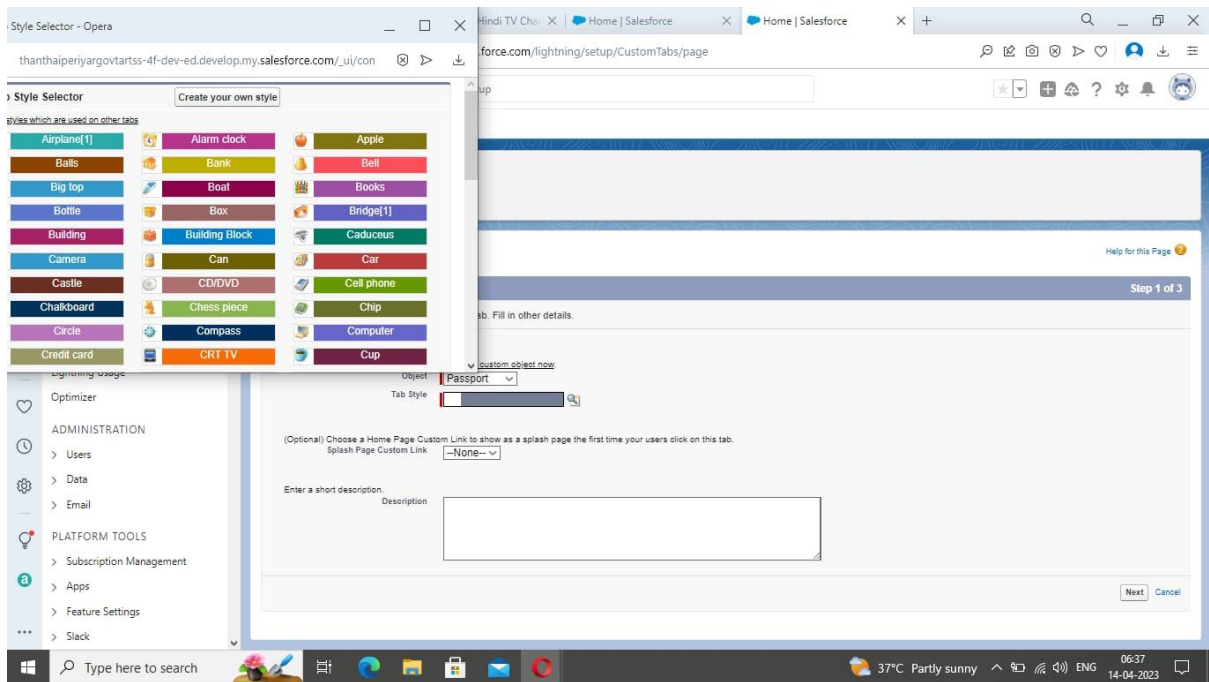
Activity- 2 :

Objects – passport

Objects - Visa Slot
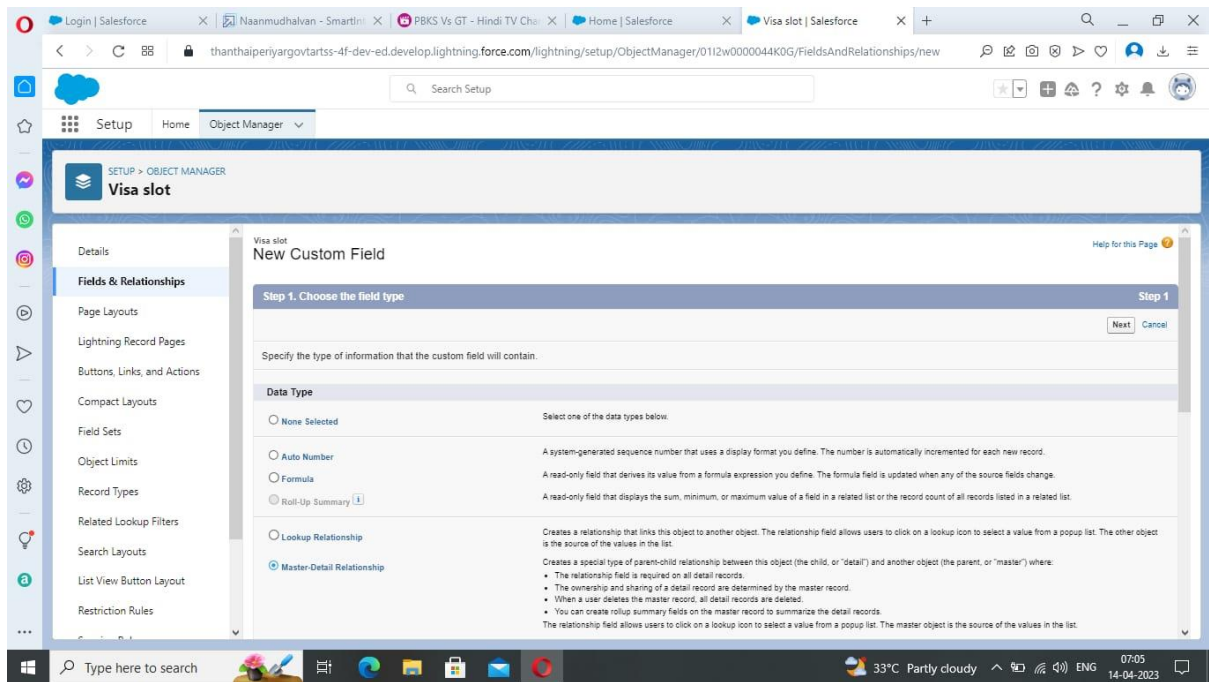
Object- Payment
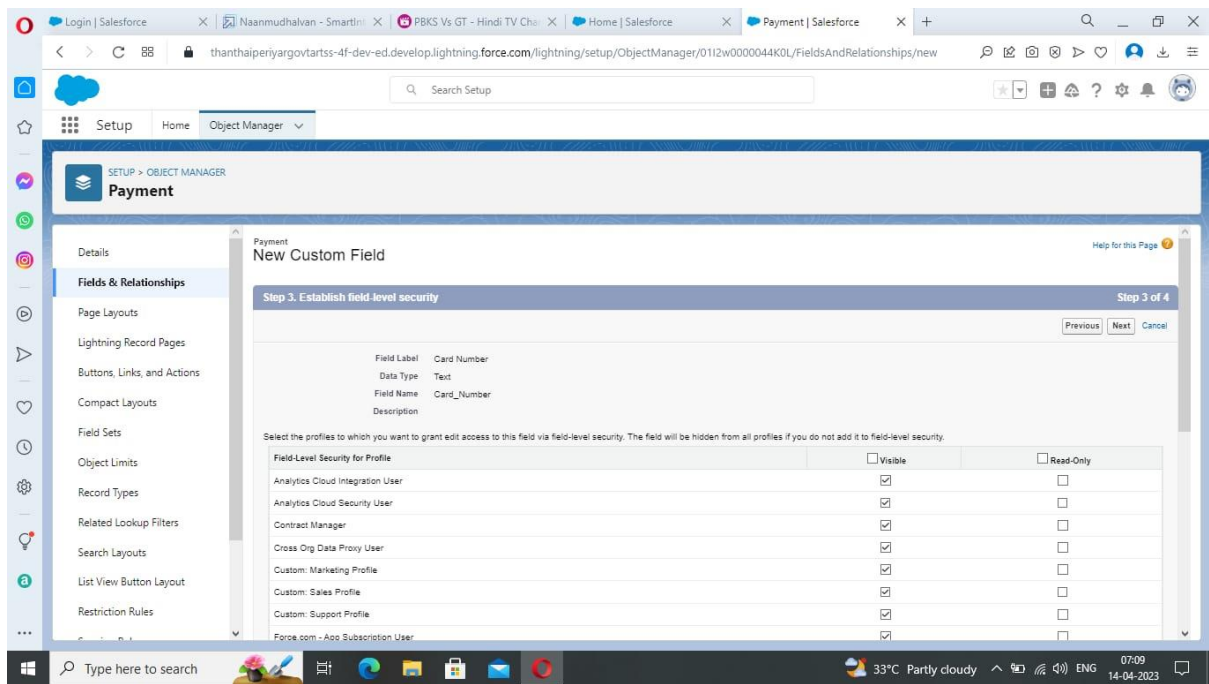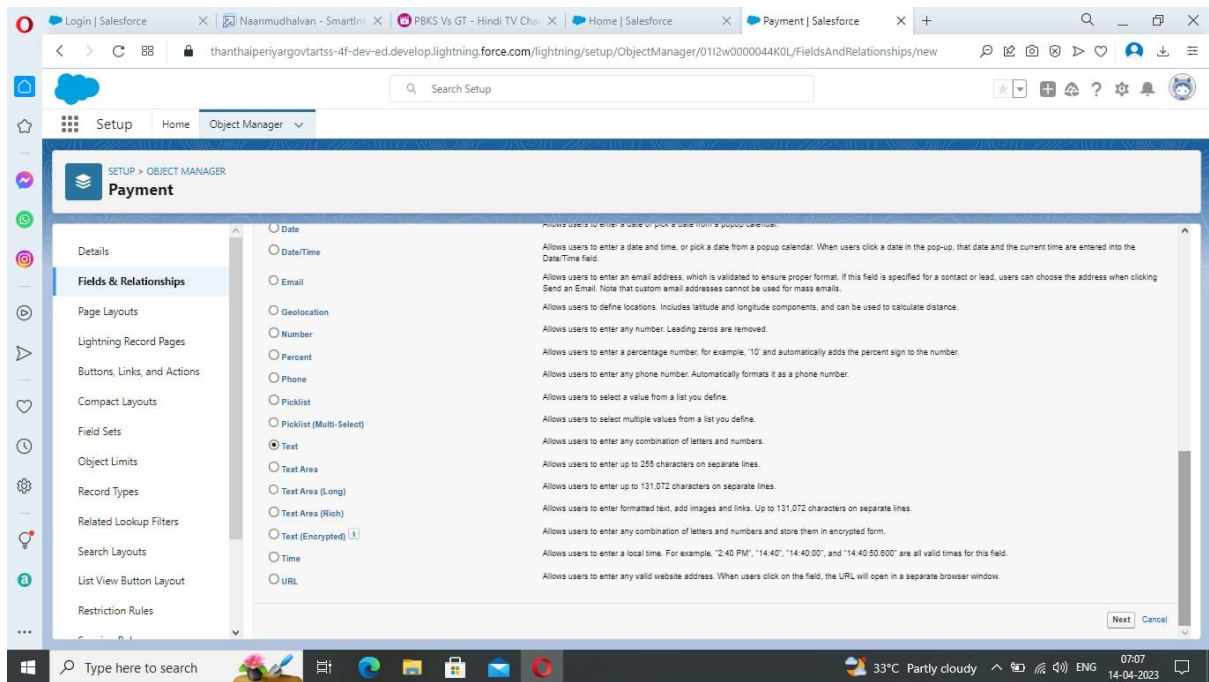
Descrption:

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

Descrption:

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.
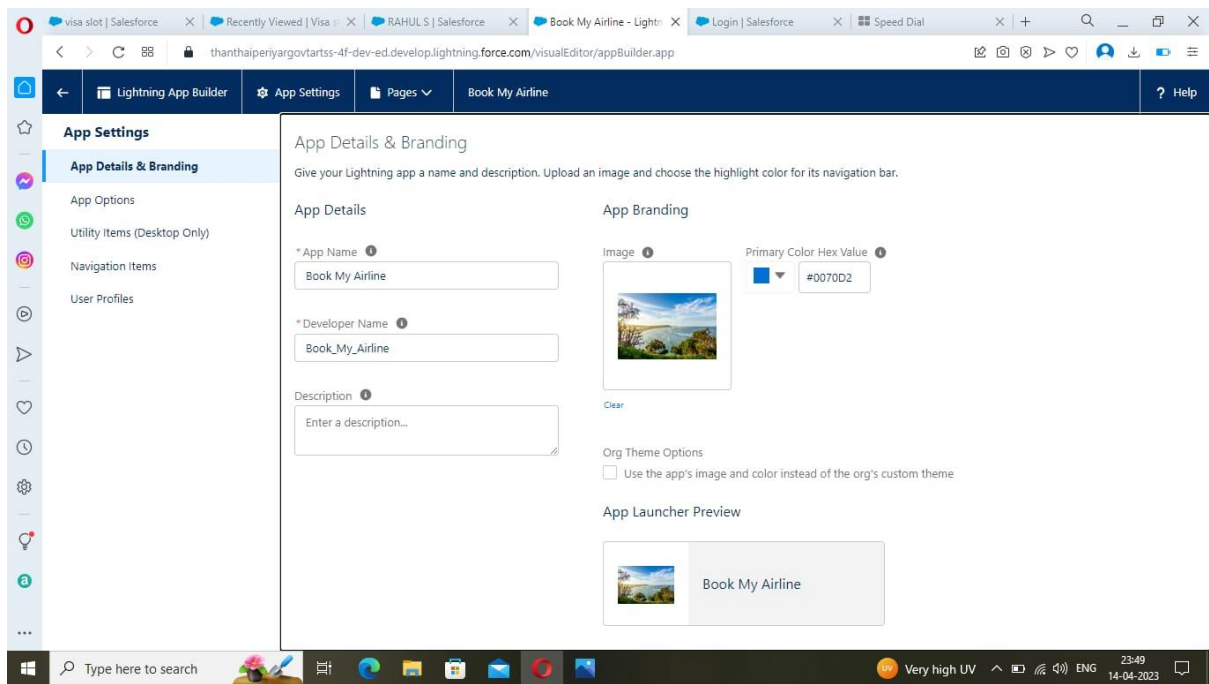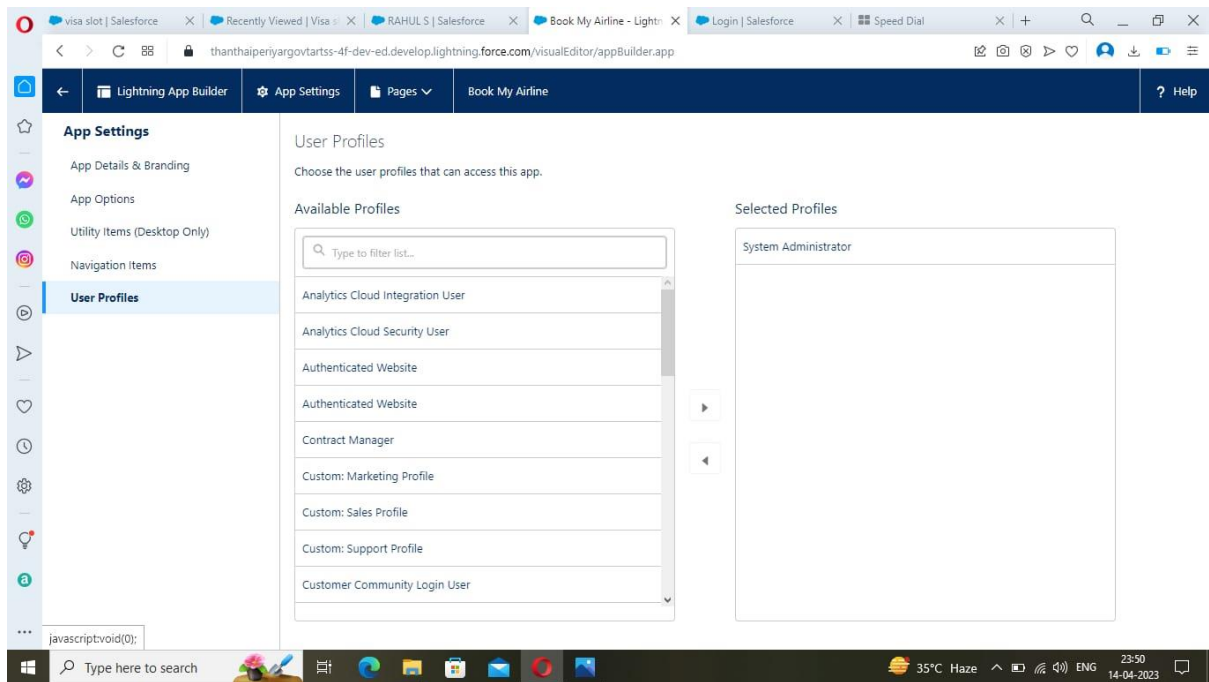2) custom objects.

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

Descrption:

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

Descrption:

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

Descrption:
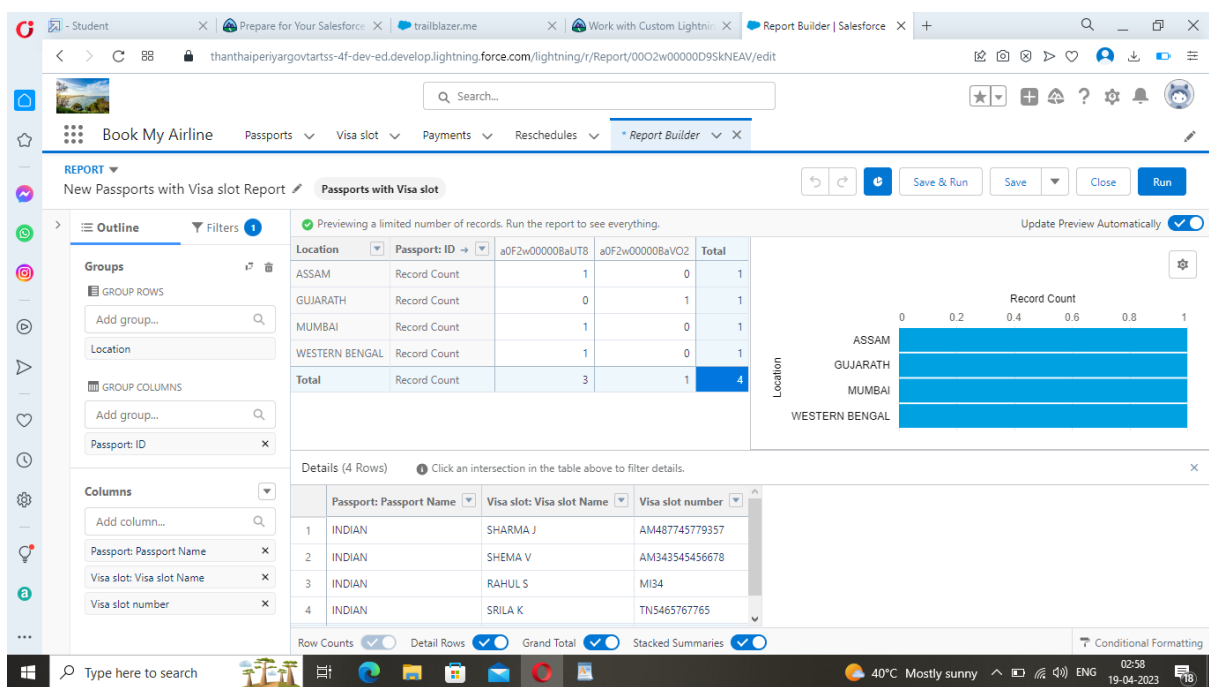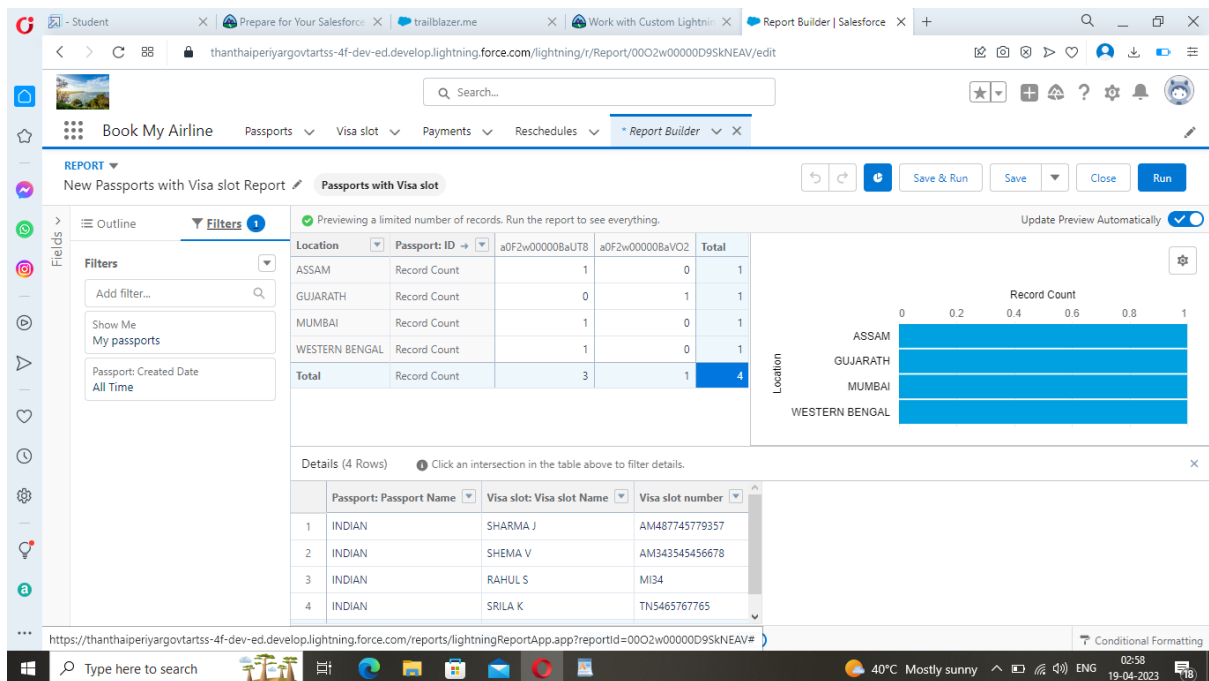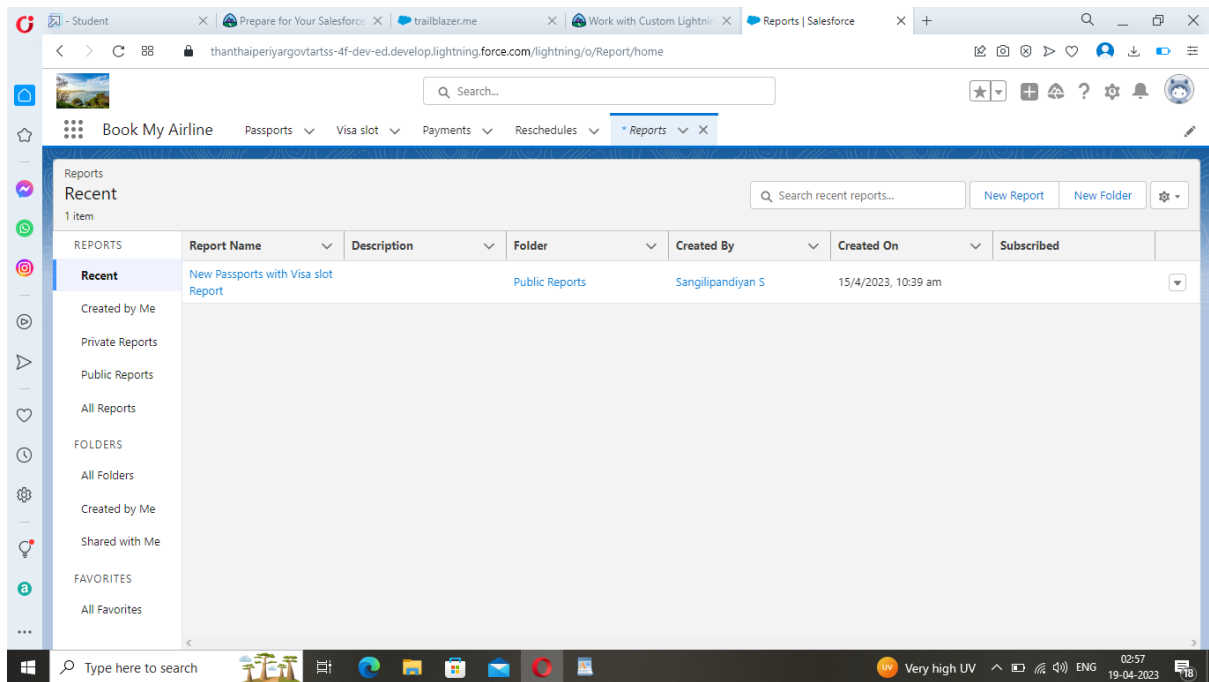
1)Navigate to setup in quick find search bar

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
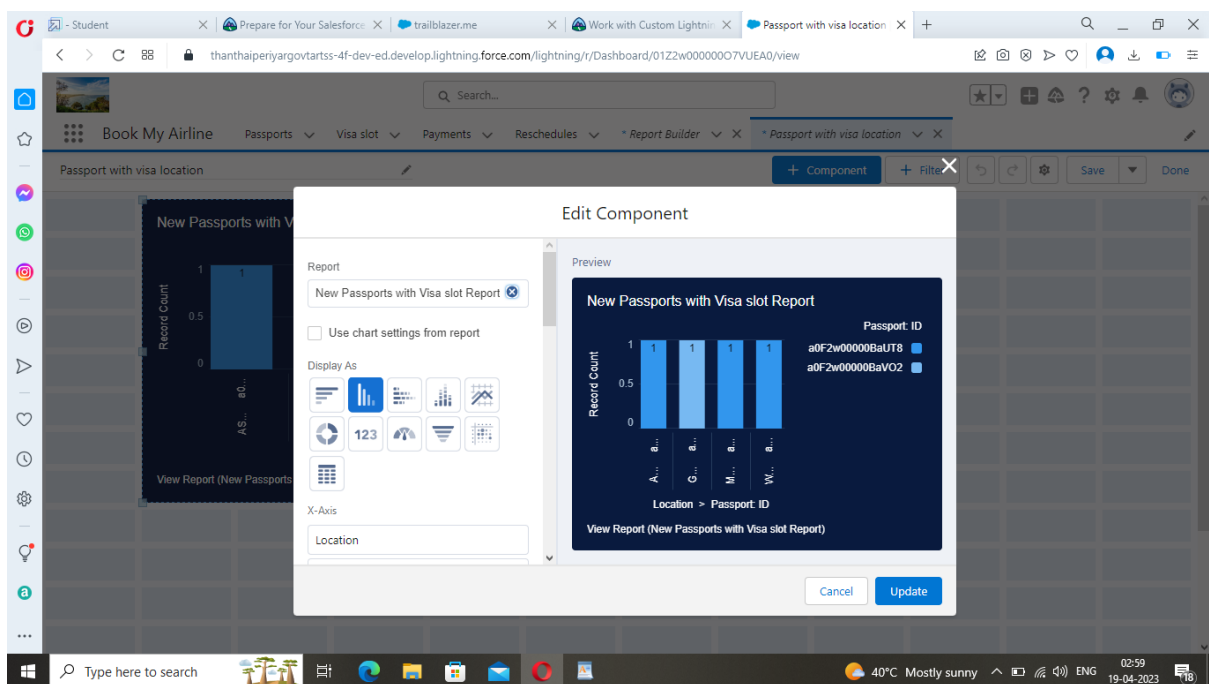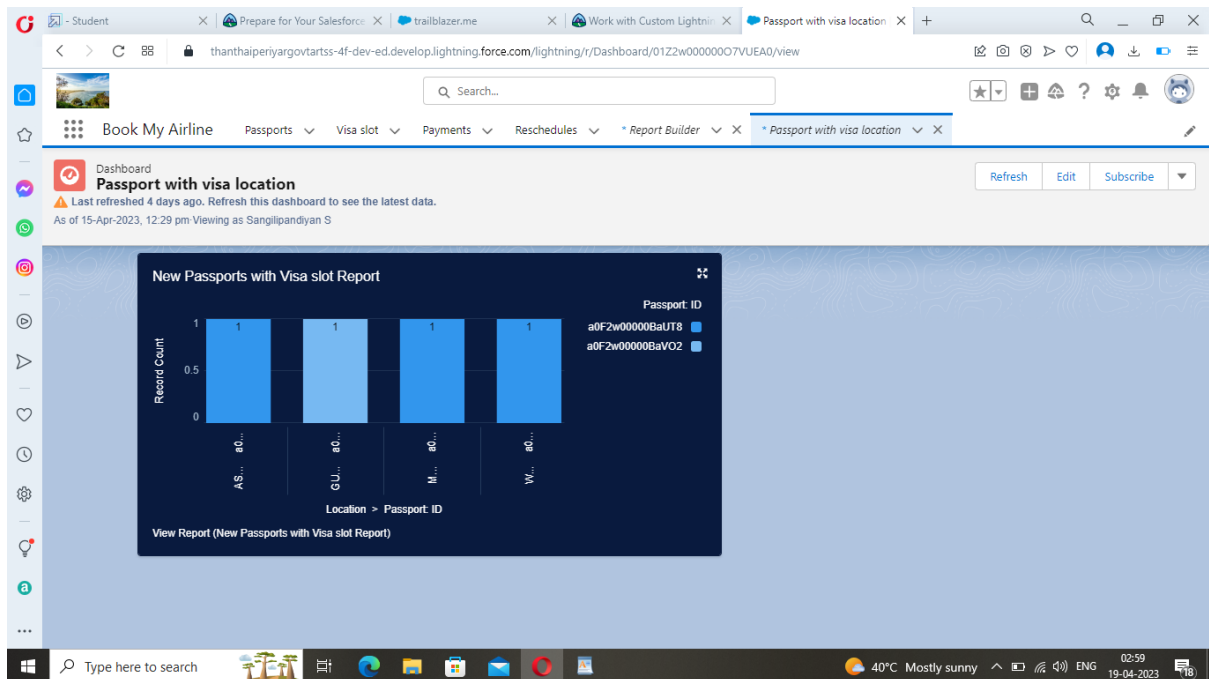
Descrption:

• 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.