

Project Report Template

1. INTRODUCTION

1.1 Overview

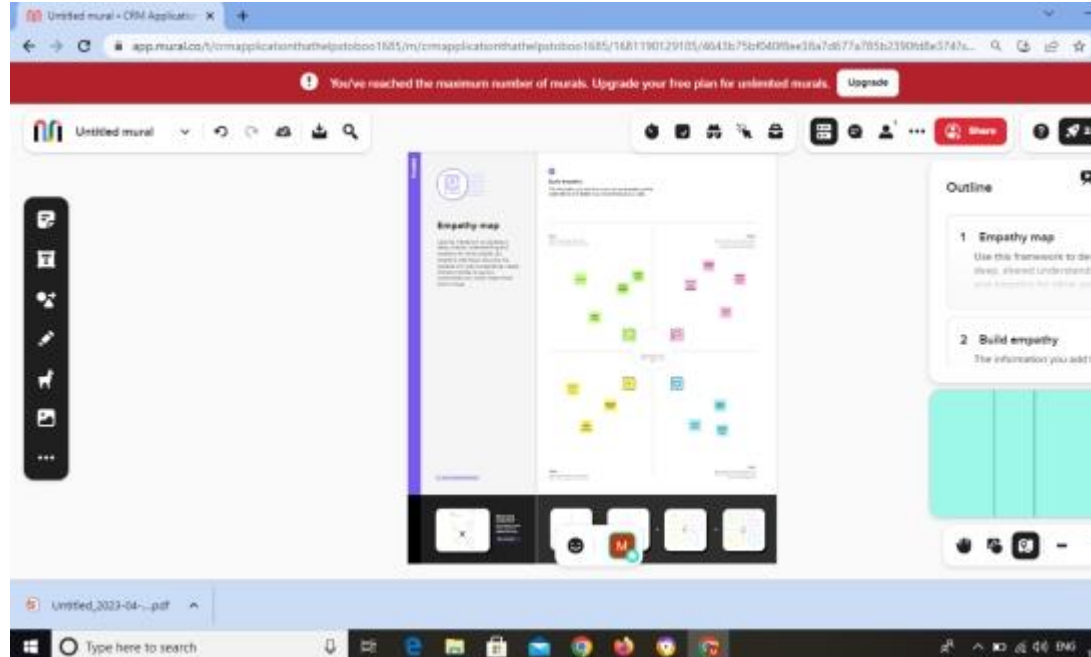
1. Salesforce is game changing technology
2. Host of productivity boosting features
3. Toward your badge for this module

1.2 Purpose

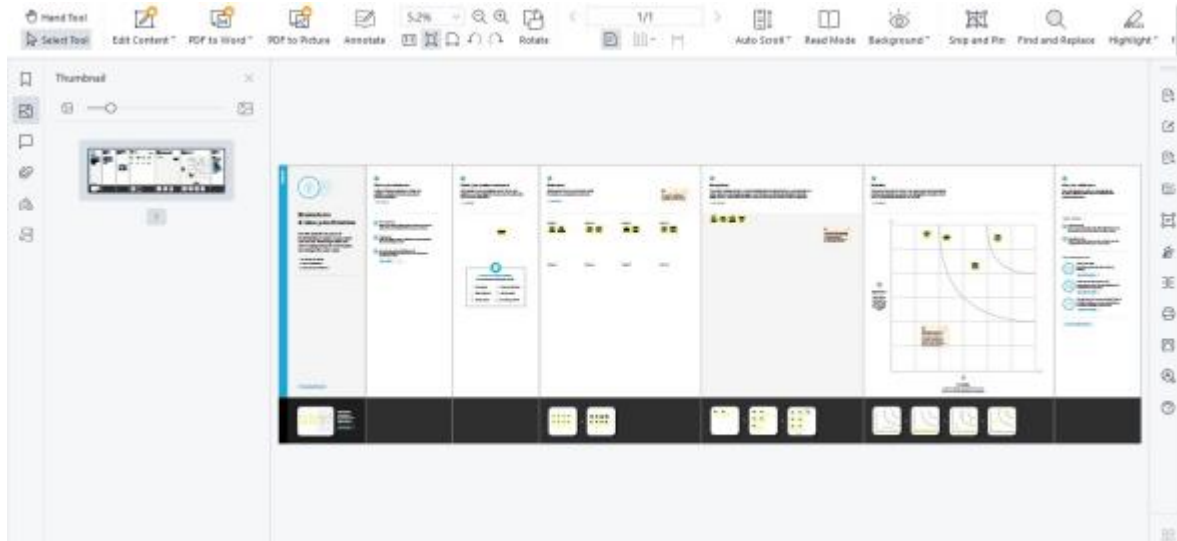
Letter that introduce the applicant, employment status, earnings, leave period and purpose of travel.

2 problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorming Map

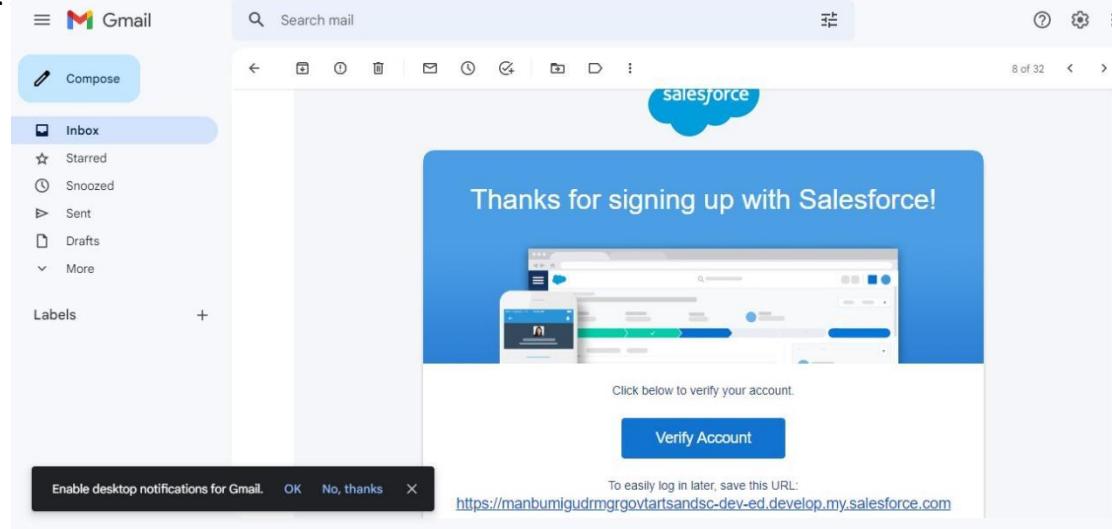


3 RESULT

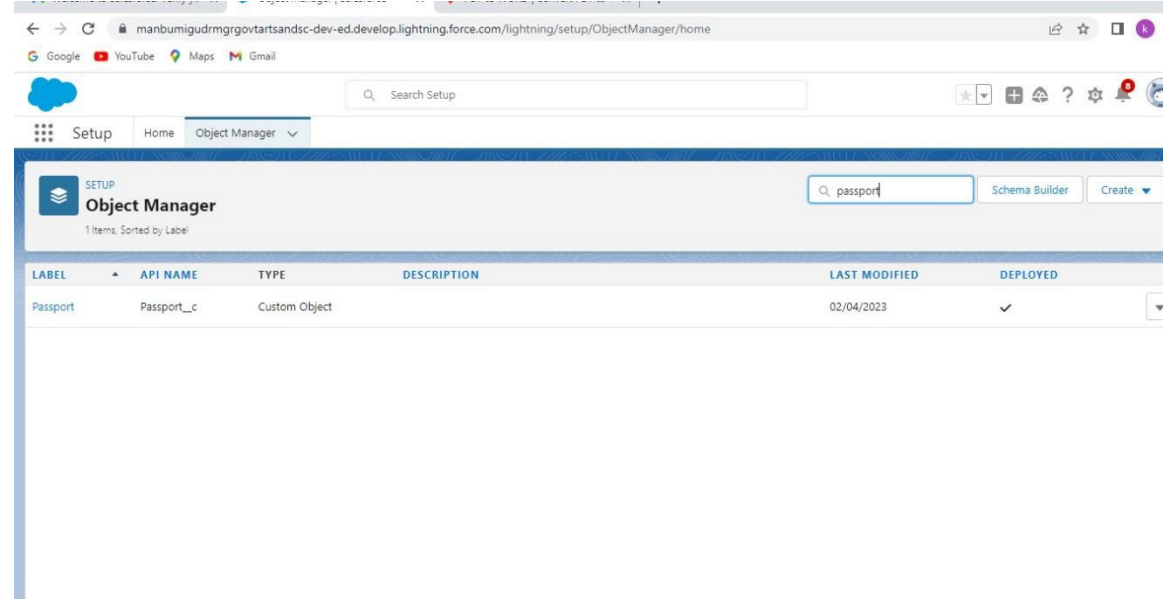
3.1 Data Model:

| | | |
|-------------------|--------------------|-------------|
| Passport | Full name | Text |
| | Passport number | Text |
| | Contact number | Number |
| | Permanent address | Text |
| | | |
| Visa slot | Location | |
| | Time | |
| | Passport number | |
| | Visa slot number | Number |
| | | |
| Payment | Payment mode | |
| | Card number | |
| | Transaction id | Auto number |
| | Cancel transaction | |
| | Visa slot number | Master |
| Reschedule/cancel | Passport number | Master |
| | Location | |
| | Time | |
| | Cancel | |
| | Status | |

3.2 Activity 2 Screenshot



Activity 1. In this activity is verify account



Activity 2.1 In this activity is object

Welcome to Salesforce: Verify your identity | Passport | Salesforce

manbumigudrmrgovtartsandsc-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003HKGN/FieldsAndRelationships/view

Google YouTube Maps Gmail

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
Passport

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

Fields & Relationships
8 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

| | | | |
|-------------------|----------------------|---------------------|---|
| check | check__c | Checkbox | |
| contact number | contact_number__c | Number(14, 0) | |
| Created By | CreatedById | Lookup(User) | |
| Full Name | Full_Name__c | Text(18) | |
| Last Modified By | LastModifiedById | Lookup(User) | |
| Owner | OwnerId | Lookup(User, Group) | ✓ |
| Passport Number | Name | Text(80) | ✓ |
| Permanent Address | Permanent_Address__c | Text(18) | |

Activity 2.2 In this activity is object

manbumigudrmrgovtartsandsc-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Google YouTube Maps Gmail

Search Setup

Setup Home Object Manager

SETUP
Object Manager
1 Items, Sorted by Label

Q visa slot Schema Builder Create

| LABEL | API NAME | TYPE | DESCRIPTION | LAST MODIFIED | DEPLOYED |
|-----------|---------------|---------------|-------------|---------------|----------|
| visa slot | visa_slots__c | Custom Object | | 02/04/2023 | ✓ |

Activity 3. In this activity is object of visa slot

manbumigudrmrgovtartsandsc-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

Setup Home Object Manager

app

Salesforce Mobile App

Data

Mass Transfer Approval Requests

Apps

App Manager

AppExchange Marketplace

Connected Apps

Connected Apps OAuth Usage

Manage Connected Apps

Lightning Bolt

Flow Category

Lightning Bolt Solutions

Mobile Apps

Enable App Cloning Disabled

29 items • Sorted by App Name • Filtered by All appnenuitems - TabSet Type

| | App Name ↑ | Developer Name | Description | Last Modified ... | App Type | Vi... |
|----|-------------------------------|------------------------|---|----------------------|---------------------|-------|
| 1 | All Tabs | AllTabSet | | 27/03/2023, 1:58 pm | Classic | |
| 2 | Analytics Studio | Insights | Build CRM Analytics dashboards and a... | 27/03/2023, 1:58 pm | Classic | ✓ |
| 3 | App Launcher | AppLauncher | App Launcher tabs | 27/03/2023, 1:58 pm | Classic | ✓ |
| 4 | Bolt Solutions | LightningBolt | Discover and manage business solution... | 27/03/2023, 2:01 pm | Lightning | ✓ |
| 5 | book my visa | book_my_visa | | 01/04/2023, 6:37 pm | Lightning | ✓ |
| 6 | Chatter Desktop | Chatter_Desktop | Chatter Desktop is an Adobe AIR-based... | 30/03/2023, 11:28 am | Connected (Managed) | |
| 7 | Chatter Mobile for BlackBerry | Chatter_for_BlackBerry | The Salesforce.com Chatter Mobile app... | 30/03/2023, 11:28 am | Connected (Managed) | |
| 8 | Community | Community | Salesforce CRM Communities | 27/03/2023, 1:58 pm | Classic | ✓ |
| 9 | Content | Content | Salesforce CRM Content | 27/03/2023, 1:58 pm | Classic | ✓ |
| 10 | Data Manager | DataManager | Use Data Manager to view limits, monit... | 27/03/2023, 1:58 pm | Lightning | ✓ |

Activity 4 In this activity is creating user

manbumigudrmrgovtartsandsc-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Search Setup

Setup Home Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

SETUP 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 User

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

| Action | Full Name ↑ | Alias | Username | Role | Active | Profile |
|-------------------------------|---------------------------|---------|---|------|--------|----------------------------------|
| <input type="checkbox"/> Edit | Chatter Expert | Chatter | chattv.00d2w00000rpbadeab.mik@cccurdy8@chatter.salesforce.com | | ✓ | Chatter Free User |
| <input type="checkbox"/> Edit | Kiruthika T | TKiru | kiruthikamaths2003@gmail.com | | ✓ | System Administrator |
| <input type="checkbox"/> Edit | thanikaalacathi kiruthika | TKiru | mathakiruthika2003@gmail.com | | ✓ | Standard User |
| <input type="checkbox"/> Edit | User Integration | intep | intepation@00d2w00000rpbadeab.com | | ✓ | Analytics Cloud Integration User |
| <input type="checkbox"/> Edit | User Security | sec | insightsecu@00d2w00000rpbadeab.com | | ✓ | Analytics Cloud Security User |

New User Reset Password(s) Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Activity 5.1 In this activity user

Setup Home Object Manager

sharing

Security

Sharing Settings

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

SETUP Sharing Settings

| | | | |
|--------------------|----------------------|----------------------|--------------------------|
| Work Order | Private | Private | ✓ |
| Work Plan | Private | Private | ✓ |
| Work Plan Template | Private | Private | ✓ |
| Work Step Template | Private | Private | ✓ |
| Work Type | Private | Private | ✓ |
| Work Type Group | Public Read/Write | Private | ✓ |
| check | Public Read/Write | Private | <input type="checkbox"/> |
| Passport | Public Read/Write | Public Read/Write | <input type="checkbox"/> |
| payment | Public Read/Write | Private | ✓ |
| Reschedule/cancel | Public Read/Write | Private | ✓ |
| visa slot | Controlled by Parent | Controlled by Parent | |

Other Settings

Manager Groups ☐ 1

Secure guest user record access ☒ 1

Require permission to view record names in lookup fields ☐ 1

Other Settings Help ?

Activity 5.2 In this activity is user of OWD

The screenshot shows the Salesforce Reports interface. The top navigation bar includes 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', 'Reports', 'Chatter', 'Groups', and 'More'. The 'Reports' tab is selected. Below the navigation bar, there is a search bar and buttons for 'New Report' and 'New Folder'. The main content area displays a list of reports under the 'Recent' section. The table has columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. One report is listed: 'Passport with visa locations' in the 'Private Reports' folder, created by 'T Kiruthika' on '6/4/2023, 10:40 am'. A sidebar on the left shows filters for 'RECENT', 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'FOLDERS', 'All Folders', 'Created by Me', 'Shared with Me', and 'FAVORITES'.

| Report Name | Description | Folder | Created By | Created On | Subscribed |
|------------------------------|-------------|-----------------|-------------|--------------------|------------|
| Passport with visa locations | | Private Reports | T Kiruthika | 6/4/2023, 10:40 am | |

Activity 6. In this activity is report

The screenshot shows the Salesforce Dashboards interface. The top navigation bar is the same as the previous screenshot. The 'Dashboards' tab is selected. Below the navigation bar, there is a search bar and buttons for 'New Dashboard' and 'New Folder'. The main content area displays a list of dashboards under the 'Recent' section. The table has columns: Dashboard Name, Description, Folder, Created By, Created On, and Subscribed. One dashboard is listed: 'passport with visa locations' in the 'Private Dashboards' folder, created by 'T Kiruthika' on '6/4/2023, 10:55 am'. A sidebar on the left shows filters for 'RECENT', 'Created by Me', 'Private Dashboards', 'All Dashboards', 'FOLDERS', 'All Folders', 'Created by Me', 'Shared with Me', and 'FAVORITES'.

| Dashboard Name | Description | Folder | Created By | Created On | Subscribed |
|------------------------------|-------------|--------------------|-------------|--------------------|------------|
| passport with visa locations | | Private Dashboards | T Kiruthika | 6/4/2023, 10:55 am | |

Activity 7. In this activity is dashboards

This screenshot is identical to the one above, showing the Salesforce Dashboards interface with the 'Recent' section. It displays a table with one dashboard: 'passport with visa locations' in the 'Private Dashboards' folder, created by 'T Kiruthika' on '6/4/2023, 10:55 am'. The sidebar and navigation bar are also identical.

| Dashboard Name | Description | Folder | Created By | Created On | Subscribed |
|------------------------------|-------------|--------------------|-------------|--------------------|------------|
| passport with visa locations | | Private Dashboards | T Kiruthika | 6/4/2023, 10:55 am | |

4. Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/mbharathi29>

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

Team Member 2 - <https://trailblazer.me/id/krishnaveni12345>

Team Member 3 - <https://trailblazer.me/id/mmayavan1>

5. ADVANTAGES & DISADVANTAGE

- Tracking of customer data
- CRM growing scope in the market
- Improve decision making and productivity
- Improve customer service

Disadvantage:

- A costly project
- CRM is not fully customized
- Not suitable for every business
- Loss of collected information records

6.APPLICATIONS

- Visa consultants CRM software is a type of management tool to manage client details and there visa updates.
- The tool is based on cloud technologies intended to serve immigration and visa consulting services.

7.CONCLUSION

- The author concludes that CRM initiatives and implementation activities within the organization is at its infancy stage.
- One of the main reasons could be the fact that the bank been in the industry period of six years.
- However for CRM to succeed ,it requires it initiatives taken from divisions across the organization.

8.FUTURE SCOPE

- Customers will become a companies best sales reps through superior products and services as well as customer oriented messaging.
- The future of CRM is more than just the future of customer relationship management software .It is really future of business.

