

Project Report Template

1 INTRODUCTION

1.1 Overview

Are you new to Salesforce? Not exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

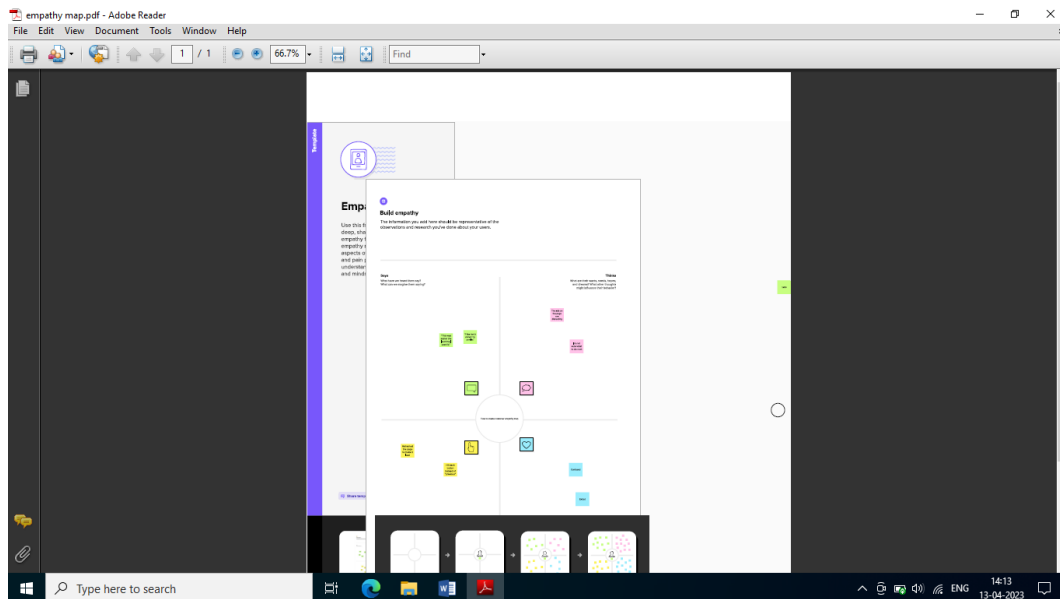
Welcome to salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce ,any way?"

1.2 Purpose

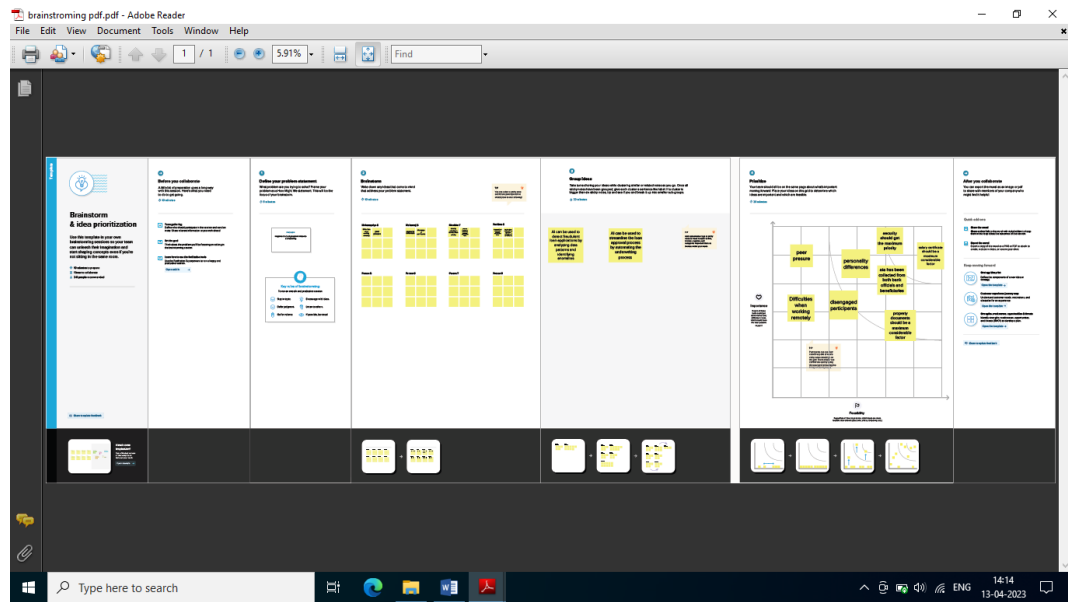
A visa slot management project is a system that is used to track and manage the availability of visa slots, which are appointments that are required for certain visa slots.

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	
obj1	Field label	Data type
	Banana	Text Type
obj2	Field label	Data type
	Onion	Text Type

3.2 Activity & Screenshot

nanmudhalvan salesforce login - x Home | Salesforce

https://governmentartscollegekaru-c-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home

Search Setup

Setup Home Object Manager

Quick Find

Setup Home

- Service Setup Assistant
- Multi-Factor Authentication Assistant
- Release Updates
- Lightning Experience Transition Assistant
- Salesforce Mobile App
- Lightning Usage
- Optimizer

ADMINISTRATION

- > Users
- > Data
- > Email

PLATFORM TOOLS

- > Subscription Management
- > Apps

Get Started Learn More Get Started

Most Recently Used

10 Items

NAME	TYPE	OBJECT
Collaboration	Custom App	
Content	Custom App	
supportforce	Custom App	
Community	Custom App	
Marketing	Custom App	
banana	Custom Object Definition	
apple	Custom Object Definition	
banana	Custom Object Definition	

nanmudhalvan salesforce login - x Home | Salesforce

https://governmentartscollegekaru-c-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home

Search Setup

Setup Home Object Manager

Quick Find

Setup Home

- Service Setup Assistant
- Multi-Factor Authentication Assistant
- Release Updates
- Lightning Experience Transition Assistant
- Salesforce Mobile App
- Lightning Usage
- Optimizer

ADMINISTRATION

- > Users
- > Data
- > Email

PLATFORM TOOLS

- > Subscription Management
- > Apps

Get Started Learn More Get Started

Most Recently Used

10 Items

NAME	TYPE	OBJECT
Collaboration	Custom App	
Content	Custom App	
supportforce	Custom App	
Community	Custom App	
Marketing	Custom App	
banana	Custom Object Definition	
apple	Custom Object Definition	
banana	Custom Object Definition	

nanmudhalvan salesforce login - x Home | Salesforce

https://governmentartscollegekaru-c-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home

Search Setup

Setup Home Object Manager

Quick Find

Setup Home

- Service Setup Assistant
- Multi-Factor Authentication Assistant
- Release Updates
- Lightning Experience Transition Assistant
- Salesforce Mobile App
- Lightning Usage
- Optimizer

ADMINISTRATION

- > Users
- > Data
- > Email

PLATFORM TOOLS

- > Subscription Management
- > Apps

Get Started Learn More Get Started

Most Recently Used

10 Items

NAME	TYPE	OBJECT
Collaboration	Custom App	
Content	Custom App	
supportforce	Custom App	
Community	Custom App	
Marketing	Custom App	
banana	Custom Object Definition	
apple	Custom Object Definition	
banana	Custom Object Definition	
mohanapriya s	User	
banana	Custom Field Definition	banana

nanmudhalvan salesforce login - x App Manager | Salesforce x +

https://governmentartscollegekaru-c-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Setup Home Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

> Subscription Management

> Apps

Enable App Cloning Disabled

22 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

	App Name	Developer Name	Description	Last Modified	Ap...	Vi...
12	Queue Management	QueueManagement	Create and manage queues for your business.	30/03/2023, 10:20 am	Lightning	✓
13	Sales	Sales	The world's most popular sales force automation (S...	30/03/2023, 10:20 am	Classic	✓
14	Sales	LightningSales	Manage your sales process with accounts, leads, op...	30/03/2023, 10:23 am	Lightning	✓
15	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with mu...	30/03/2023, 10:20 am	Lightning	✓
16	Salesforce Chatter	Chatter	The Salesforce Chatter social network, including pr...	30/03/2023, 10:20 am	Classic	✓
17	Salesforce Schedul...	LightningScheduler	Set up personalized appointment scheduling.	30/03/2023, 10:22 am	Lightning	✓
18	Service	Service	Manage customer service with accounts, contacts, c...	30/03/2023, 10:20 am	Classic	✓
19	Service Console	LightningService	(Lightning Experience) Lets support agents work wi...	30/03/2023, 10:20 am	Lightning	✓
20	Site.com	Sites	Build pixel-perfect, data-rich websites using the dra...	30/03/2023, 10:20 am	Classic	✓
21	Subscription Mana...	RevenueCloudConsole	Get started automating your revenue processes	30/03/2023, 10:20 am	Lightning	✓
22	visa	visa		03/04/2023, 7:37 pm	Lightning	✓

nanmudhalvan salesforce login - x Users | Salesforce x +

https://governmentartscollegekaru-c-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Setup Home Object Manager

Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

> Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

> Data

> Email

PLATFORM TOOLS

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
	Edit	Chatter.Export	Chatter	chatter_0042w00000r0ineav.usiscomfod@chatter.salesforce.com		✓	Chatter Free User
	Edit	S. Mohanaagiri	MS	mob8799303@gmail.com		✓	System Administrator
	Edit	S. Mohanaagiri	ms	mohana.ambika2003@gmail.com	SVP, Sales & Marketing	✓	Standard User
	Edit	User_Integration	integ	integration@0062w00000r0ineav.com		✓	Analytics Cloud Integration User
	Edit	User_Security	sec	insightsecurity@0062w00000r0ineav.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

nanmudhalvan salesforce login - x Object Manager | Salesforce x +

https://governmentartscollegekaru-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Setup Home Object Manager

Object Manager

51+ Items, Sorted by Label

Quick Find

Schema Builder

Create

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
apple	apple_c	Custom Object		03/04/2023	✓
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Asset	Asset	Standard Object			
Asset Action	AssetAction	Standard Object			
Asset Action Source	AssetActionSource	Standard Object			

nanmudhalvan salesforce login - x | Object Manager | Salesforce x +

https://governmentartscollegekaru-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Search Setup

Setup Home Object Manager

SETUP Object Manager
51+ Items, Sorted by Label

Quick Find Schema Builder Create

Object Name	API Name	Object Type	Created Date	Is Deleted	Actions
Asset Relationship	AssetRelationship	Standard Object			
Asset State Period	AssetStatePeriod	Standard Object			
Assigned Resource	AssignedResource	Standard Object			
Associated Location	AssociatedLocation	Standard Object			
Authorization Form	AuthorizationForm	Standard Object			
Authorization Form Consent	AuthorizationFormConsent	Standard Object			
Authorization Form Data Use	AuthorizationFormDataUse	Standard Object			
Authorization Form Text	AuthorizationFormText	Standard Object			
banana	mohana_c	Custom Object	30/03/2023	✓	
banana	banana_c	Custom Object	06/04/2023	✓	
Business Brand	BusinessBrand	Standard Object			

nanmudhalvan salesforce login - x | Object Manager | Salesforce x +

https://governmentartscollegekaru-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Search Setup

Setup Home Object Manager

SETUP Object Manager
51+ Items, Sorted by Label

Quick Find Schema Builder Create

banana	banana_c	Custom Object	06/04/2023	✓	
Business Brand	BusinessBrand	Standard Object			
Campaign	Campaign	Standard Object			
Campaign Member	CampaignMember	Standard Object			
Card Payment Method	CardPaymentMethod	Standard Object			
Cart	WebCart	Standard Object			
Cart Adjustment Basis	WebCartAdjustmentBasis	Standard Object			
Cart Adjustment Group	WebCartAdjustmentGroup	Standard Object			
Cart Delivery Group	CartDeliveryGroup	Standard Object			
Cart Item	CartItem	Standard Object			
Cart Item Price Adjustment	CartItemPriceAdjustment	Standard Object			
Cart Tax	CartTax	Standard Object			

nanmudhalvan salesforce login - x | banana | Salesforce x +

https://governmentartscollegekaru-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
banana

Details Edit Delete

Details

Description

API Name
mohana_c

Custom
✓

Singular Label
banana

Plural Label
bananas

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

nanmudhalvan salesforce login - x

onion | Salesforce

+

https://governmentartscollegekaru-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

onion

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

Details

Description

API Name
onion__c

Custom

Singular Label
onion

Plural Label
onions

Enable Reports

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete

Type here to search

nanmudhalvan salesforce login - x

Reports | Salesforce

+

https://governmentartscollegekaru-c-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

Search...

Sales Console Reports

App Launcher

New Reports Report

mohanapriya

Reports

Recent

2 items

Search recent reports...

New Report

New Folder

RECENT

Report Name

Description

Folder

Created By

Created On

Subscribed

Recent

New Reports Report

Private Reports

Mohanapriya S

6/4/2023, 1:42 pm

Created by Me

New Reports Report

Private Reports

Mohanapriya S

6/4/2023, 1:31 pm

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

History

Type here to search

14:29

13-04-2023

The screenshot shows the Salesforce Dashboards interface. The top navigation bar includes 'Sales Console', 'Dashboards', 'App Launcher', 'New Reports Report', and 'mohanapriya'. The left sidebar lists 'Recent', 'Created by Me', 'Private Dashboards', 'All Dashboards', 'FOLDERS', 'All Folders', 'Created by Me', 'Shared with Me', 'FAVORITES', and 'All Favorites'. The main content area displays a table of recent dashboards with columns: Dashboard Name, Description, Folder, Created By, Created On, and Subscribed. The first row shows a dashboard named 'mohanapriya' created by 'Mohanapriya S' on '6/4/2023, 1:45 pm'. Below the table, a preview of the dashboard is shown, featuring a donut chart titled 'New Reports Report' with a record count of 3. The chart has two segments: a blue segment labeled '1' and a light blue segment labeled '2'. The text 'Which flows run, what's...' is visible next to the chart. The bottom of the image shows a Windows taskbar with the search bar and system tray.

4 Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/hgahlot3>

Team Member 1 - <https://trailblazer.me/id/mos67>

Team Member 2 - <https://trailblazer.me/id/mos68>

Team Member 3 – <https://trailblazer.me/id/pavi69>



Project Report Template

5 ADVANTAGES & DISADVANTAGE

Advantages: Improved Information Organization, CRM Improves your customer service.

Disadvantages: CRM costs, One of the greatest challenges to CRM implementation is cost.

6 APPLICATIONS

Improve customer service, Increase in sales, Retain more customers, Better Analytics.

7 CONCLUSION

CRM in retail allows business to make smarter serve their customers and maximize profits from repeat purchases.

8 FUTURE SCOPE

CRM is about which companies will be able to pivot to meet the changing needs and trends-driven by customer expectations.