

# **CRM APPLICATION THAT HELPS TO BOOK A VISA SLOT**

## **Project Report Template**

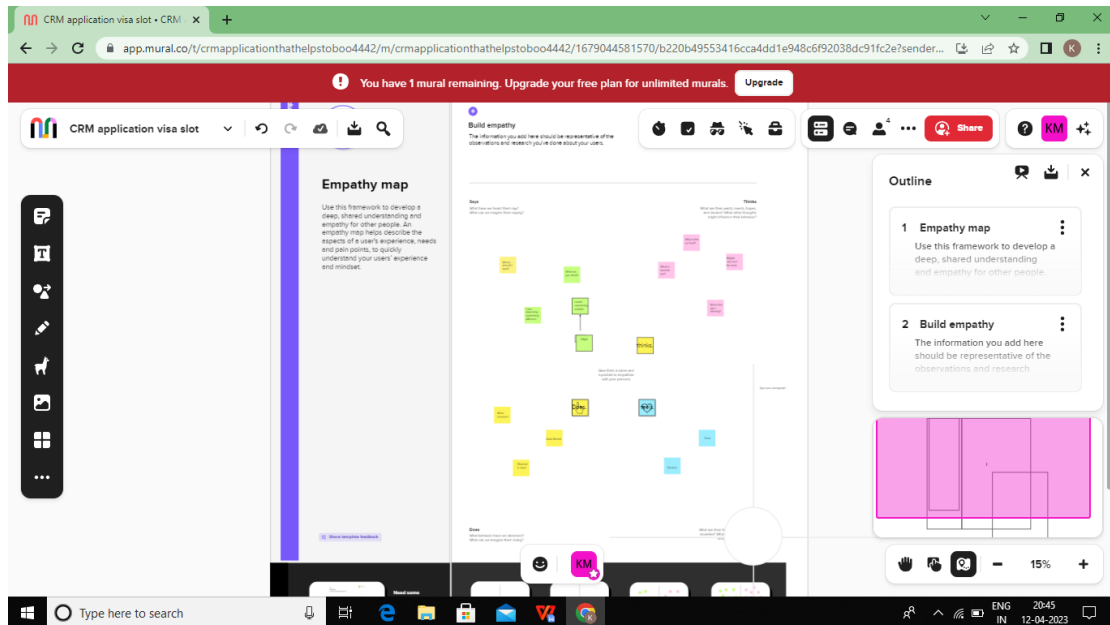
### **Introduction:**

A visa is a document that is stamped on a persons passport by an embassy. It names the kind of visit and says how long the person can stay. Sometimes, people need to go through an interview held at the embassy before they get a visa. Many countries require foreign visitors to have a valid passport and a visa before they can enter the country, but there are exceptions.

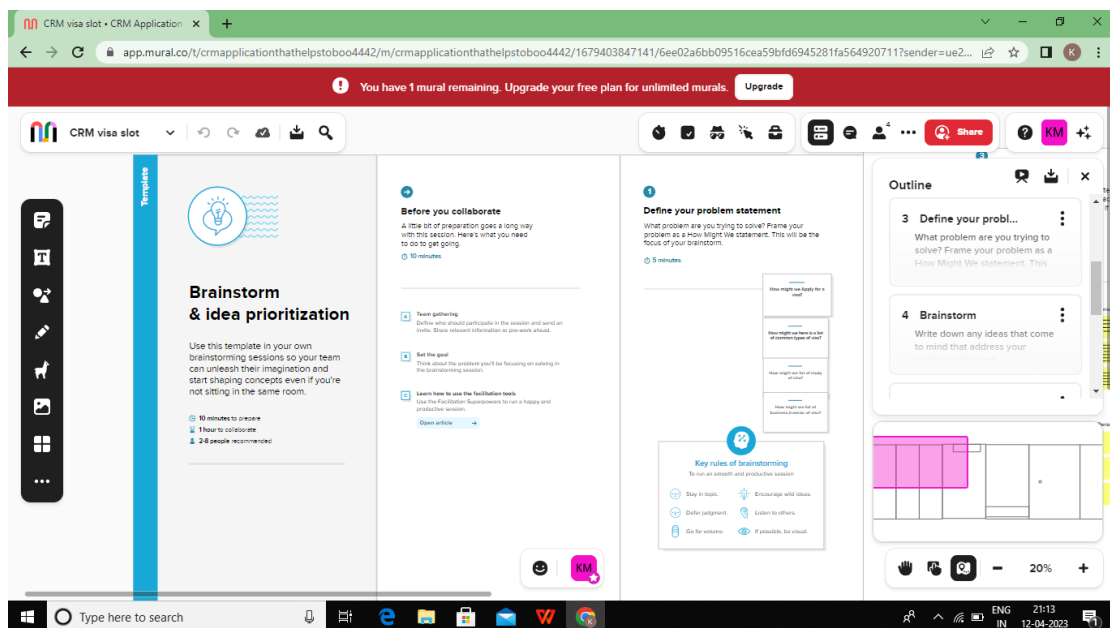
Some countries, such as some states of the former Soviet Union, require that their citizens, and sometimes foreign travelers, obtain an exit visa in order to be allowed to leave the country. Until 2004, foreign students in Russia were issued only an entry visa on being accepted to University there, and had to obtain an exit visa to return home. This policy has since been changed, and foreign students are now issued multiple(and exit) visa.

## Problem Definition and Design Thinking:

### Empathy map:



### Idealization and Brainstorming map Screenshot:



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app.mural.co/v/crmapplicationthathelpstoboo4442/m/crmapplicationthathelpstoboo4442/1679403847141/6ee02a6bb09516cea59bfd6945281fa564920711?sender=ue2... Upgrade

You have 1 mural remaining. Upgrade your free plan for unlimited murals.

CRM visa slot

Person 1

Person 2

Person 3

Person 4

Person 5

Person 6

Person 7

Person 8

Outline

3 Define your probl...

What problem are you trying to solve? Frame your problem as a How Might We statement. This

4 Brainstorm

Write down any ideas that come to mind that address your

32%

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app.mural.co/v/crmapplicationthathelpstoboo4442/m/crmapplicationthathelpstoboo4442/1679403847141/6ee02a6bb09516cea59bfd6945281fa564920711?sender=ue2... Upgrade

You have 1 mural remaining. Upgrade your free plan for unlimited murals.

CRM visa slot

Importance

Tip

Quick add-ons

Share the mural

Export the mural

Keep moving forward

Strategy blueprint

Customer experience journey map

Opportunities & threats

Outline

3 Define your probl...

What problem are you trying to solve? Frame your problem as a How Might We statement. This

4 Brainstorm

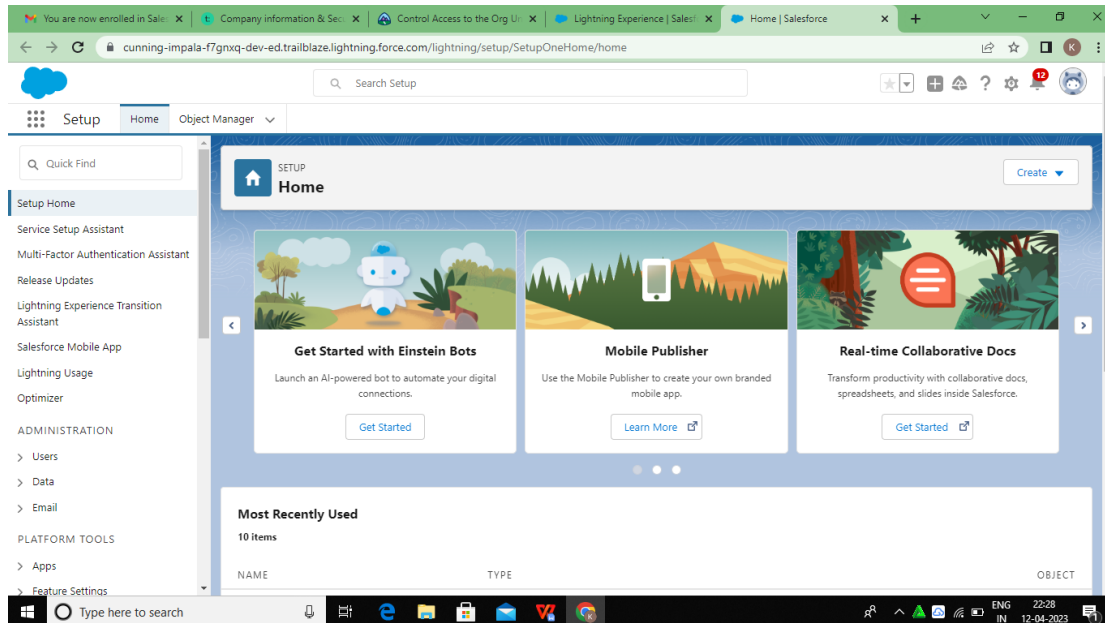
Write down any ideas that come to mind that address your

20%

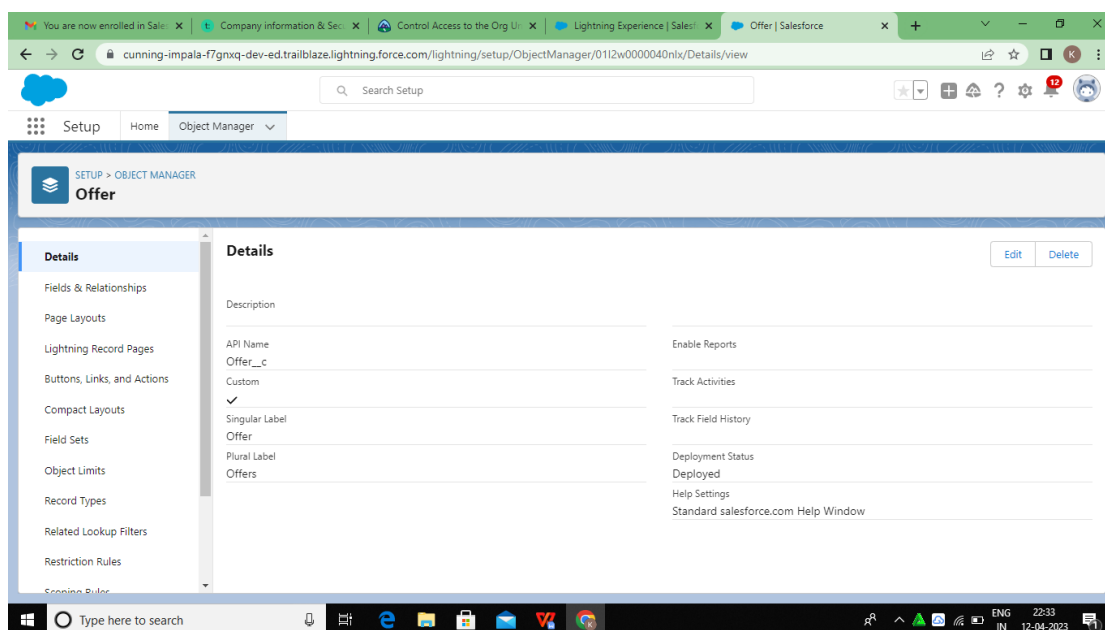
# RESULT:

## Activity and screenshot:

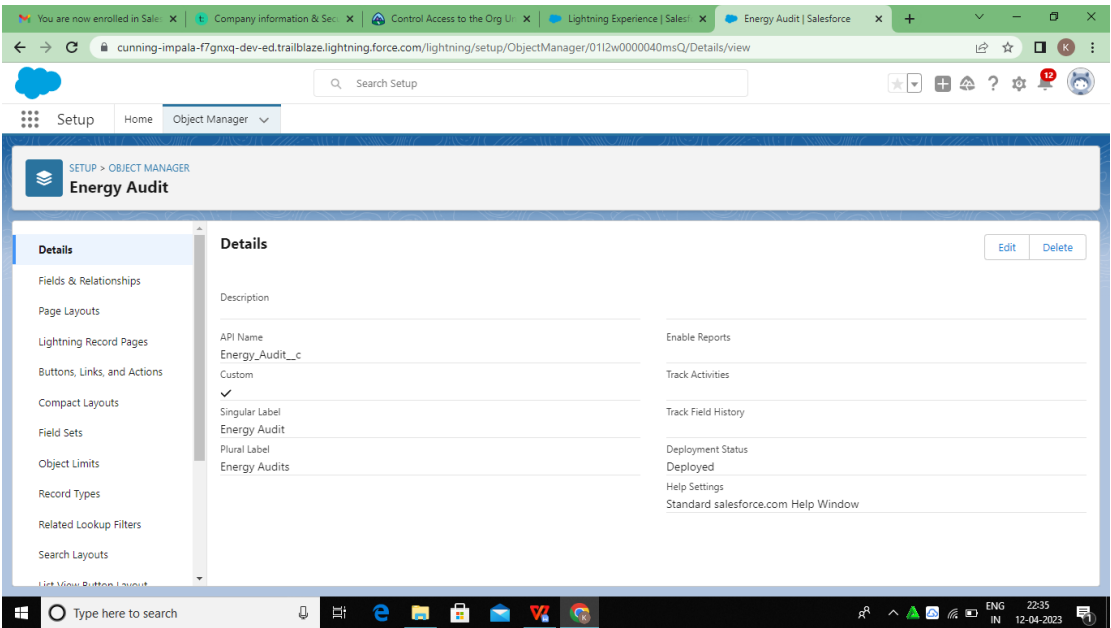
### Create Salesforce Org-creating Developer Account



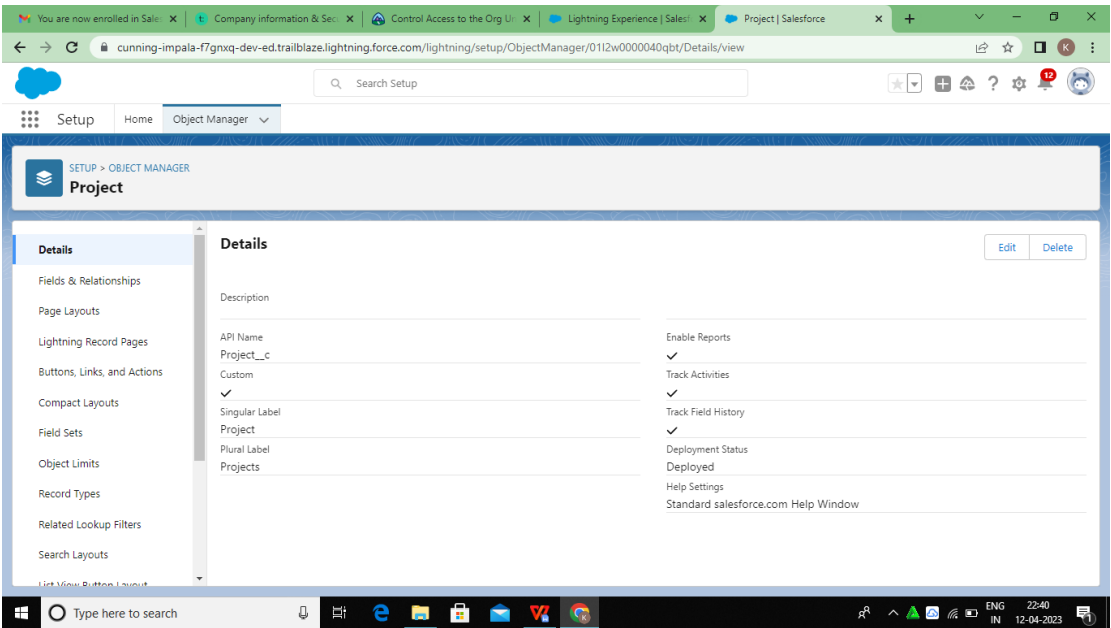
## Creation of offer object:



# Creation of Energy Audit Object:

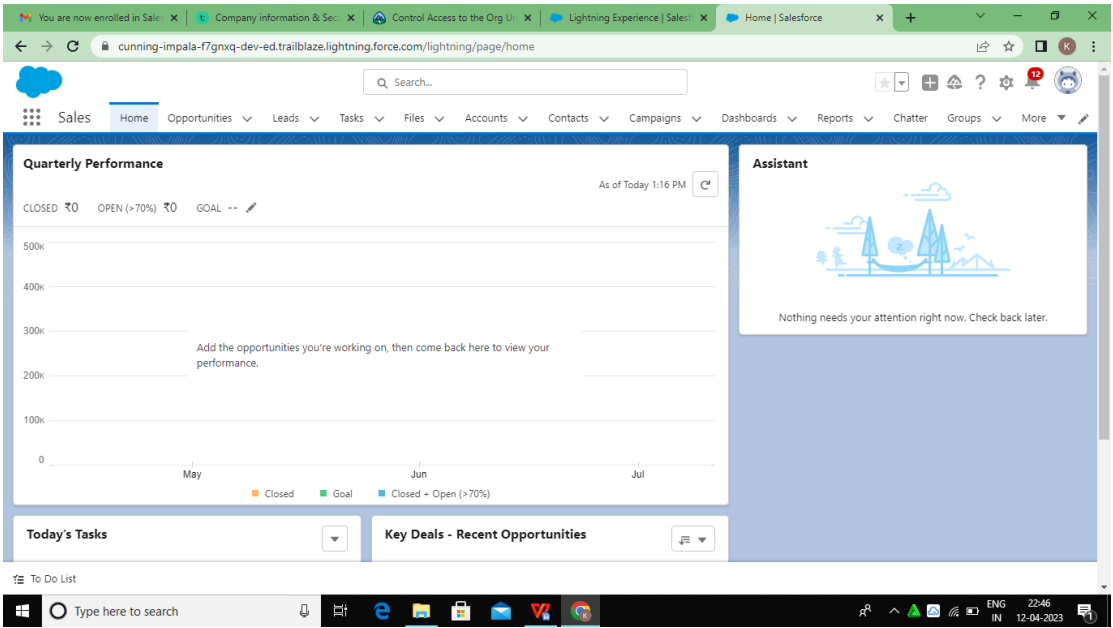


# Creation of project object:



# Lightening App

## Create sales app



# Fields and Relationship

## Creation Field for The Energy audit

The screenshot shows the Salesforce Lightning Experience Setup page for the 'Energy Audit' object. The left sidebar contains a navigation menu with options: 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', and 'Search Layouts'. The main content area is titled 'Fields & Relationships' and displays a table of fields for the 'Energy Audit' object. The table has columns for 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The fields listed are: 'Account' (Lookup(Account)), 'Annual Energy Usage (kWh)' (Number(18, 0)), 'Audit Notes' (Long Text Area(32768)), 'Average Annual Electric Cost' (Currency(16, 2)), 'Created By' (Lookup(User)), 'Energy Audit Name' (Text(80)), 'Last Modified By' (Lookup(User)), and 'Owner' (Lookup(User, Group)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account	Account__c	Lookup(Account)		✓
Annual Energy Usage (kWh)	Annual_Energy_Usage_kWh__c	Number(18, 0)		✓
Audit Notes	Audit_Notes__c	Long Text Area(32768)		✓
Average Annual Electric Cost	Average_Annual_Electric_Cost__c	Currency(16, 2)		✓
Created By	CreatedById	Lookup(User)		✓
Energy Audit Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		✓
Owner	OwnerId	Lookup(User, Group)		✓

# Creation of Fields for offer

Browser tabs: You are now em..., Company inform..., Control Access t..., Lightning Experi..., Home | Salesforce..., Home | Salesforce..., Offer | Salesforce x

Address bar: cunning-impala-f7gnqx-dev-ed.trailblaze.lightning.force.com/lightning/setup/ObjectManager/0112w0000040nlx/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Offer

Details

Fields & Relationships

7 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Contact	Contact_c	Lookup(Customer)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Offer Amount	Offer_Amount__c	Currency(18, 0)		
Offer Name	Name	Auto Number		✓
Property	Property__c	Master-Detail(Customer)		✓
Target Close Date	Target_Close_Date__c	Date		

Type here to search

ENG IN 22:56 12-04-2023

# Creation of Fields for project

Browser tabs: You are now em..., Company inform..., Control Access t..., Lightning Experi..., Home | Salesforce..., Home | Salesforce..., Project | Salesforce x

Address bar: cunning-impala-f7gnqx-dev-ed.trailblaze.lightning.force.com/lightning/setup/ObjectManager/0112w0000040qbt/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Project

Details

Fields & Relationships

5 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Priority	Priority__c	Picklist		
Project Name	Name	Text(80)		✓

https://cunning-impala-f7gnqx-dev-ed.trailblaze.lightning.force.com/lightning/setup/ObjectManager/0112w0000040qbt/FieldsAndRelationships/LastModifiedBy/view

Type here to search

ENG IN 22:58 12-04-2023

## **Trail head Profile public URL:**

**Team lead- <https://trailblazer.me/id/vaishu4>**

**Team member 1- <https://trailblazer.me/id/suha123>**

**Team member 2- <https://trailblazer.me/id/anushiriya1063>**

## **ADVANTAGES&DISADVANTAGES.**

- ❖ Trustworthy reporting
- ❖ Dashboards that visually showcase data.
- ❖ Improved messaging with automation.
- ❖ Proactive service.
- ❖ Efficiency enhanced by automation.
- ❖ Simplified collaboration.
- ❖ Sourcing Organic Leads
- ❖ Launch Email Campaigns
- ❖ Improve Team Coordination
- ❖ Generate Reports
- ❖ Market Research Data
- ❖ Task and Time Management
- ❖ Provide Better Customer Service
- ❖ Access Sales and Customer Data Instantly.
- ❖ CRM costs. One of the greatest challenges to CRM implementation is cost
- ❖ Business culture. A lack of commitment or resistance to cultural change from people within the company can cause major difficulties with CRM implementation
- ❖ Poor communication
- ❖ Lack of leadership.



What is one of the main advantages of CRM?

A CRM can help you store customer data such as user behavior, how long a customer has been with your business, purchase records, and notes on sales interactions, which you can use to optimize your sales and marketing processes and improve customer service across your organization.21-Feb-2023

What is not the advantage of CRM?



Certain businesses where customer transactions are highly standard may not benefit from a CRM system. A CRM system works best where personalisation is required in client/company interactions and where there are multiple touch-points over time between the client and the business across departments.

## **APPLICATION:**

How to write a visa application

### **Required Details For Business Purposes**

1. Letterhead of company.
2. Travel dates.
3. The purpose of the business trip.
4. The duration of the trip.
5. The company name, as well as your position in the company.
6. The visa type you are applying for (Business Visa)
7. Contact information of the employer.
8. Any other relevant information

## **CONCLUSION:**

CRM is developing into a major element of corporate strategy for many organizations. A greater focus on CRM is the only way the banking industry can protect its market share and boost growth. With intensifying competition, declining market share, deregulation, smarter and more demanding customers, there is competition between the banks to attain a competitive advantage over one another or for sustaining the survival in competition. -n -India, the banking sector has been operating in a very stable environment from last thirty forty years.