

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

## **1.INTRODUCTION:**

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 applications. It might be used by a government agency or a visa processing centre to schedule and manage appointments with applicants.

## **OVERVIEW**

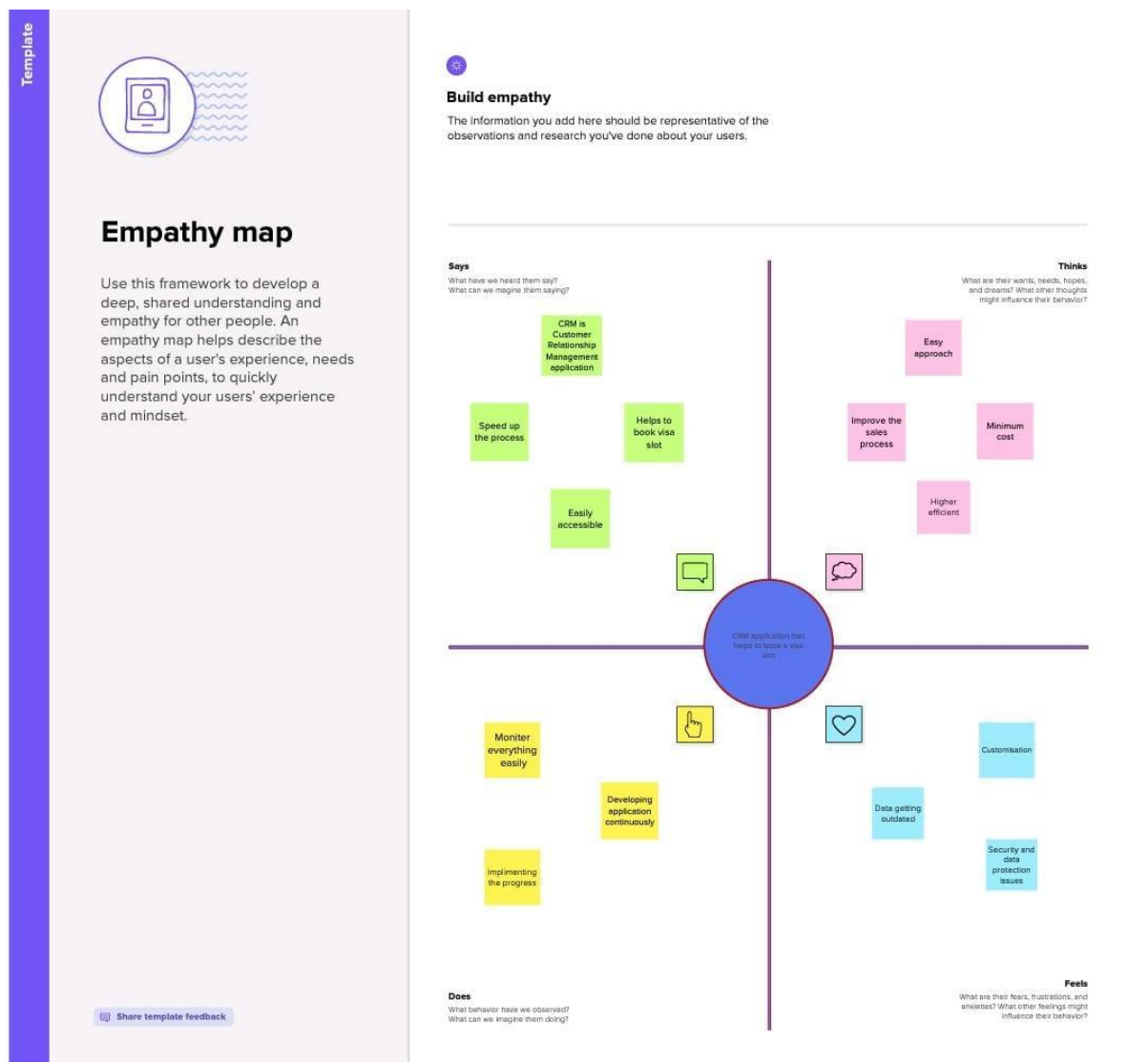
Salesforce is your customer success platform, designed to help you sell, service, market, analyse , and connect with your customers. Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud. So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this.

## **PURPOSE**

A CRM system manages all your contacts and aggregates lead and customer information to build profiles of everyone you interact with. This gives you easy access to important information to better understand customer behaviour like purchase records and previous communications with contacts across different channels (chat, email, etc.). Customers won't have to repeat their stories over and over to you, and you'll be able to address issues with best practice and less effort for improved customer loyalty.


## 2. Problem definition & design thinking:

### 2.1. Empathy map






## 2.2. Ideation & Brainstorming:

Template




### Brainstorm & idea prioritization

Use this template in your own brainstorming sessions so your team can unleash their imagination and start shaping concepts even if you're not sitting in the same room.


 10 minutes to prepare  
 1 hour to collaborate  
 2-8 people recommended

[Share template feedback](#)



#### Before you collaborate

A little bit of preparation goes a long way with this session. Here's what you need to do to get going.

 10 minutes

A

Team gathering

Define who should participate in the session and send an invite. Share relevant information or pre-work ahead.

B


Set the goal

Think about the problem you'll be focusing on solving in the brainstorming session.

C

Learn how to use the facilitation tools


Use the Facilitation Superpowers to run a happy and productive session.

[Open article](#) 

1


#### Define your problem statement

What problem are you trying to solve? Frame your problem as a How Might We statement. This will be the focus of your brainstorm.

 5 minutes


PROBLEM


How might we [your problem statement]?





#### Key rules of brainstorming


To run a smooth and productive session


 Stay in topic.

 Encourage wild ideas.

 Defer judgment.

 Listen to others.

 Go for volume.

 If possible, be visual.



### 3.1. Data Model

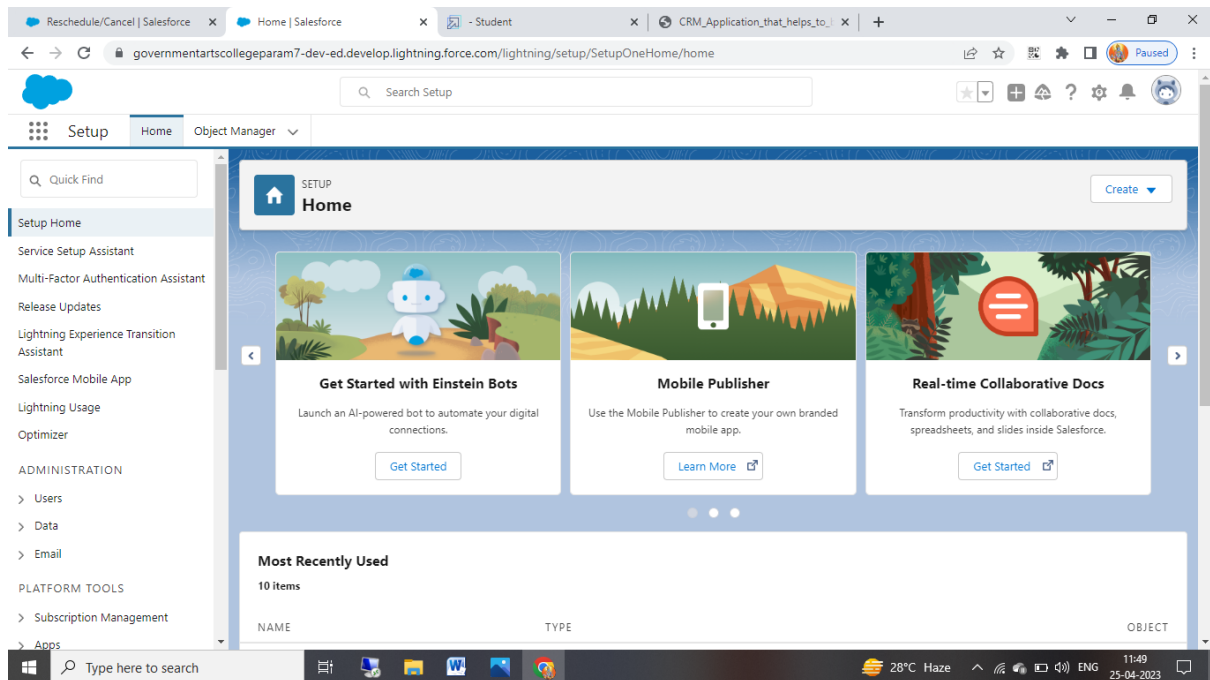
OBJECT NAME	FIELDS IN THE OBJECT	
Passport	FIELD LABLE	DATA TYPE
	Full name	Text
	Passport number	Number
	Contact number	Number
	Permanent address	Text
Visa slot	FIELD LABLE	DATA TYPE
	Location	Text
	time	Time
	Passport number(master)	Master detail number(number)
	Visaslot number	Number
Payment	FIELD LABLE	DATA TYPE
	Payment mode	Text
	Card number	Number
	Transaction id(auto number)	Number
	Cancel transaction	Text
	Visaslot number(master)	Master detail number(number)

	FIELD LABLE	DATA TYPE
	Passport	Master detail

Reschedule/ Cancel	number(master)	number(number)
	Location	Text
	Time	Time
	Cancel	Text
	Status	Text

Activity:1

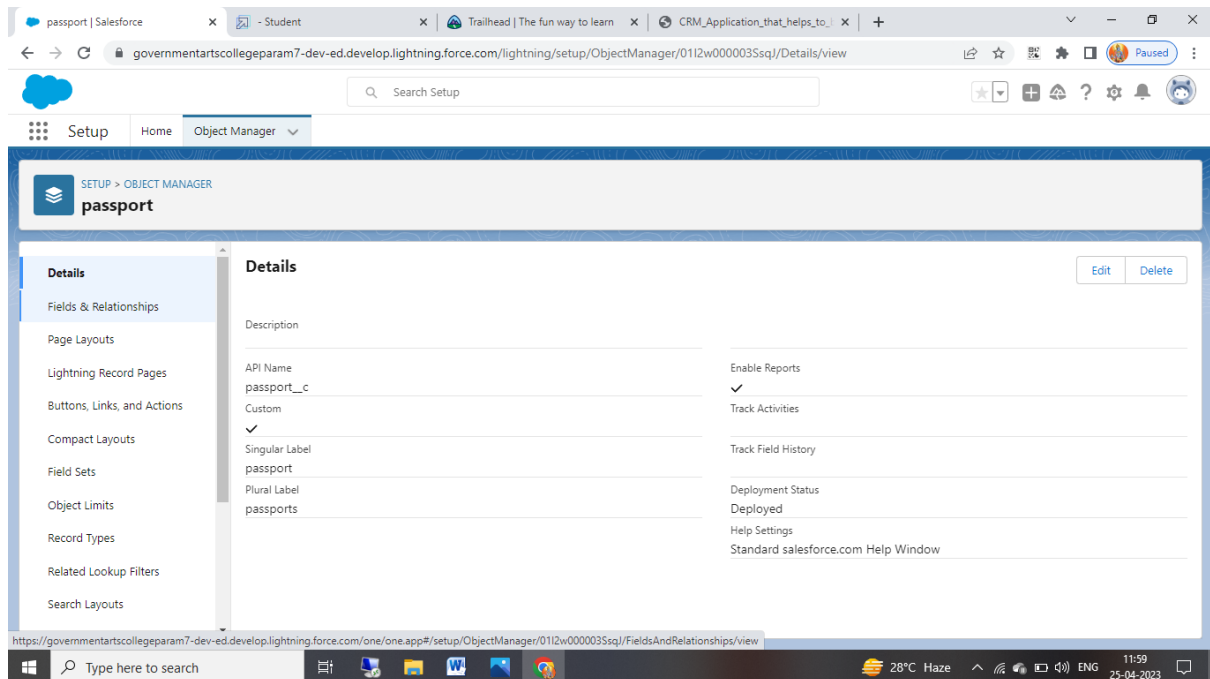
Creation of custom object:



Object name: passport

Label : passport

Plural label : passports

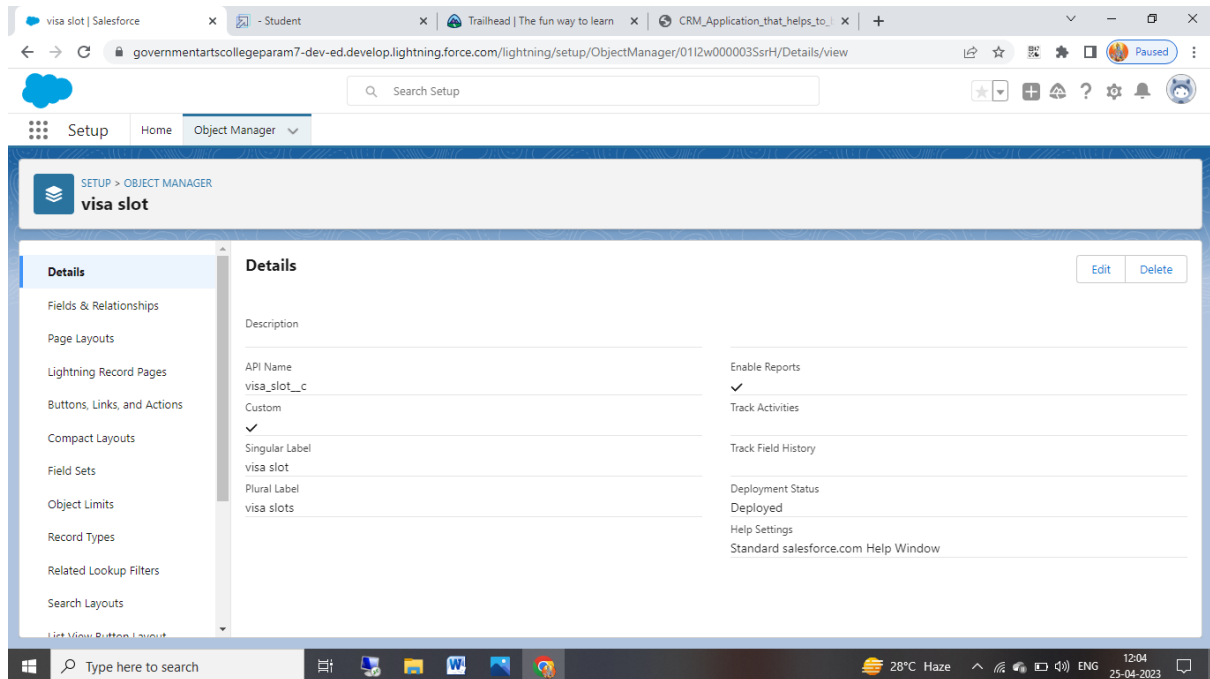


Object : Visa slot

Label: Visa slot



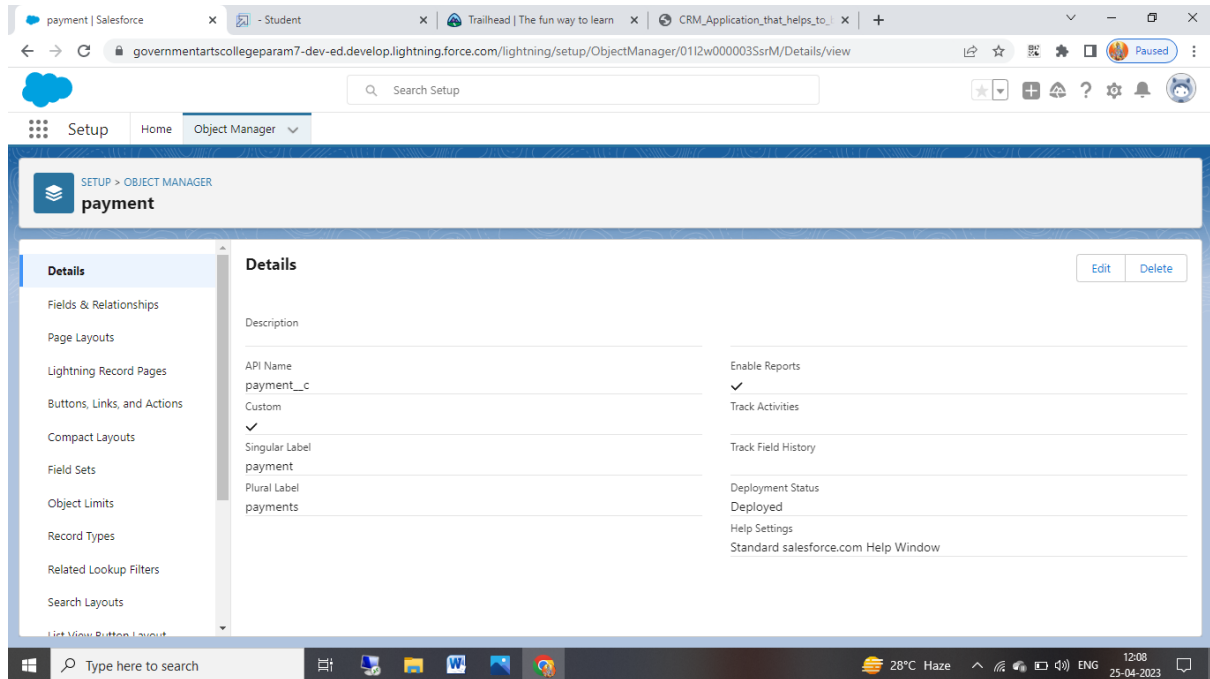
## Plural label: Visa slots



Object: Payment

Label: payment

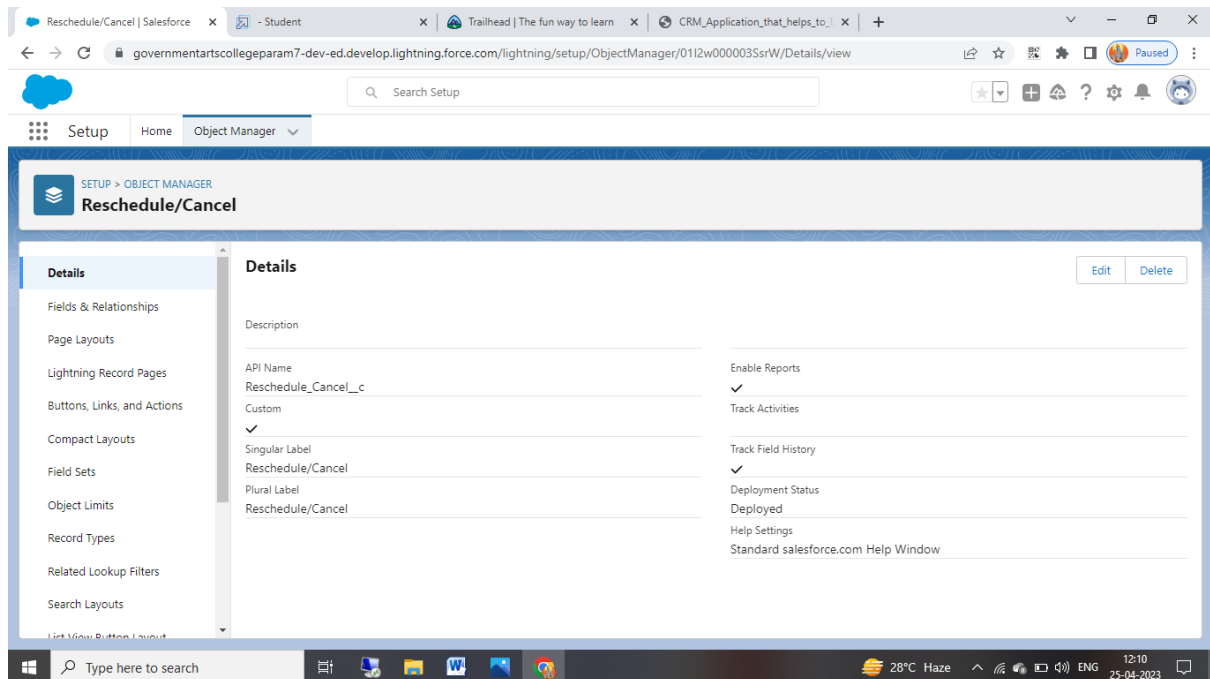
# Plural Label: payments



Object: Reschedule\cancel

Label: Reschedule\cancel

Plural label: Reschedule\cancel



Milestone 3: Relationship between objects

Object : Passport

Object Manager | Salesforce x - Student x Trailhead | The fun way to learn x CRM\_Application\_that\_helps\_to\_ x +

governmentartscollegeparam7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Search Setup

Setup Home Object Manager

Object Manager

1 Items, Sorted by Label

pass

Schema Builder Create

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
passport	passport__c	Custom Object		11/04/2023	✓

Type here to search

28°C Haze 12:15 25-04-2023

passport | Salesforce x - Student x Trailhead | The fun way to learn x CRM\_Application\_that\_helps\_to\_ x +

governmentartscollegeparam7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000003SsqJ/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

passport

Details

Fields & Relationships

8 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 Number	Contact_Number__c	Number(10, 0)		
Created By	CreatedById	Lookup(User)		
Full Name	Full_Name__c	Text(10)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
passport Name	Name	Text(80)		✓
Passport Number	Passport_Number__c	Number(10, 0)		
Permenant Address	Permenant_Address__c	Text(10)		

Type here to search

28°C Haze 12:16 25-04-2023

Object: visa slot

visa slot | Salesforce

governmentartscollegeparam7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003SsrH/FieldsAndRelationships/view

Setup > OBJECT MANAGER  
visa slot

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
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
location	location__c	Text(10)		
passport number	passport_number__c	Master-Detail(passport)		✓
time	time__c	Time		
Visa Slot Number	Visa_Slot_Number__c	Number(10, 0)		
visa slot Name	Name	Text(80)		✓

https://governmentartscollegeparam7-dev-ed.develop.lightning.force.com/one/app#/setup/ObjectManager/0112w000003SsrH/FieldsAndRelationships/view

Type here to search

28°C Haze

12:18  
25-04-2023

## Object : Payment

payment | Salesforce

governmentartscollegeparam7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003SsrM/FieldsAndRelationships/view

Setup > OBJECT MANAGER  
payment

Details

**Fields & Relationships**  
8 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

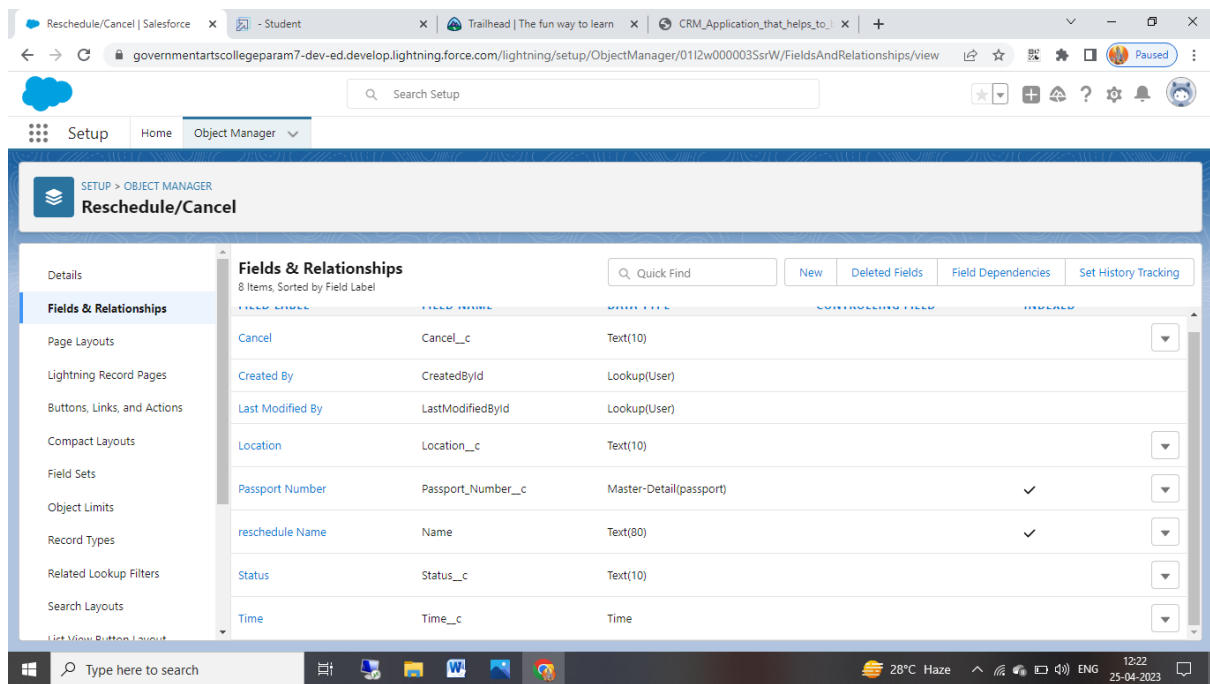
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Cancel Transaction	Cancel_Transaction__c	Text(10)		
Card Number	Card_Number__c	Number(10, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Payment Mode	Payment_Mode__c	Text(10)		
payment Name	Name	Text(80)		✓
Transaction Id	Transaction_Id__c	Auto Number		
Visa Slot Number	Visa_Slot_Number__c	Master-Detail(visa slot)		✓

Type here to search

28°C Haze

12:20  
25-04-2023

## Object : Reschedule\Cancel



## Milestone 4: APP

Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of

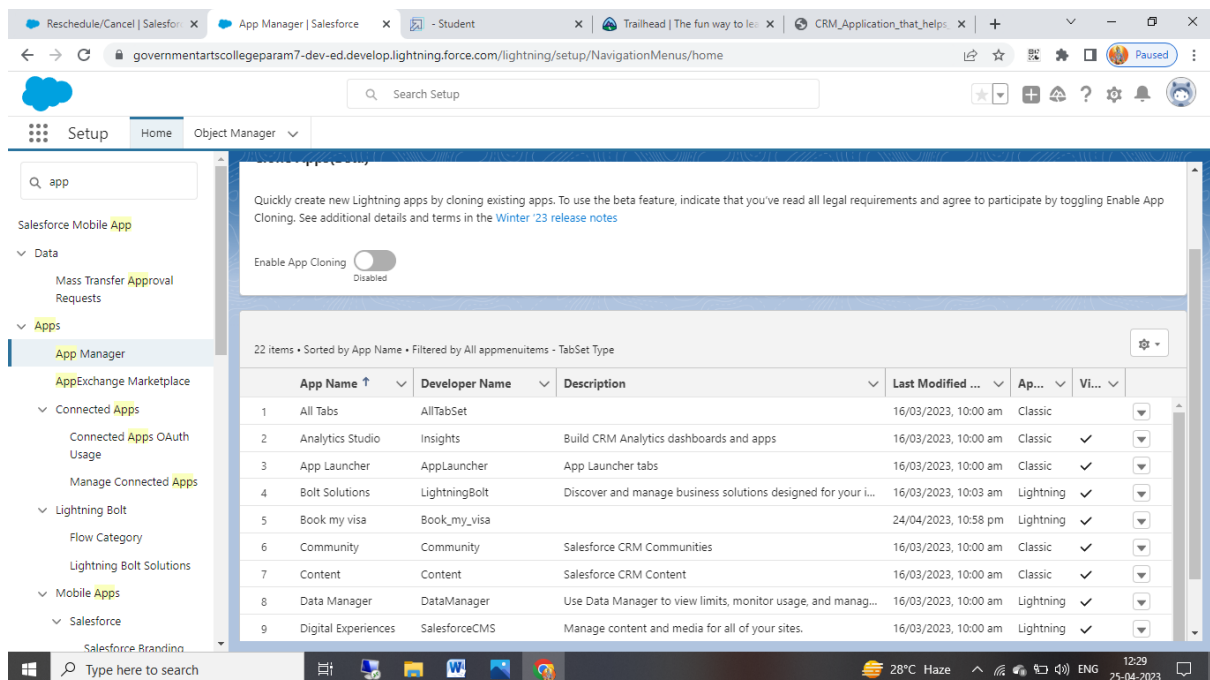
tabs. The simplest app usually has just two tabs. There are two types of Salesforce Applications:

## 1) Standard App

## 2) Custom App

Creation of App :

An app is a collection of items that work together to serve a particular function. Salesforce apps come in two flavors: Classic and Lightning.



The screenshot displays the Salesforce App Manager interface. The left sidebar shows a navigation menu with categories like Data, Apps, and Salesforce. The main content area shows a list of installed apps, including All Tabs, Analytics Studio, App Launcher, Bolt Solutions, Book my visa, Community, Content, Data Manager, and Digital Experiences. The table below provides details for these apps.

	App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi...
1	All Tabs	AllTabSet		16/03/2023, 10:00 am	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	16/03/2023, 10:00 am	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	16/03/2023, 10:00 am	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your i...	16/03/2023, 10:03 am	Lightning	✓
5	Book my visa	Book_my_visa		24/04/2023, 10:58 pm	Lightning	✓
6	Community	Community	Salesforce CRM Communities	16/03/2023, 10:00 am	Classic	✓
7	Content	Content	Salesforce CRM Content	16/03/2023, 10:00 am	Classic	✓
8	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manag...	16/03/2023, 10:00 am	Lightning	✓
9	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	16/03/2023, 10:00 am	Lightning	✓

## Milestone 5 : USER

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

## Activity-1:

### Creation of User

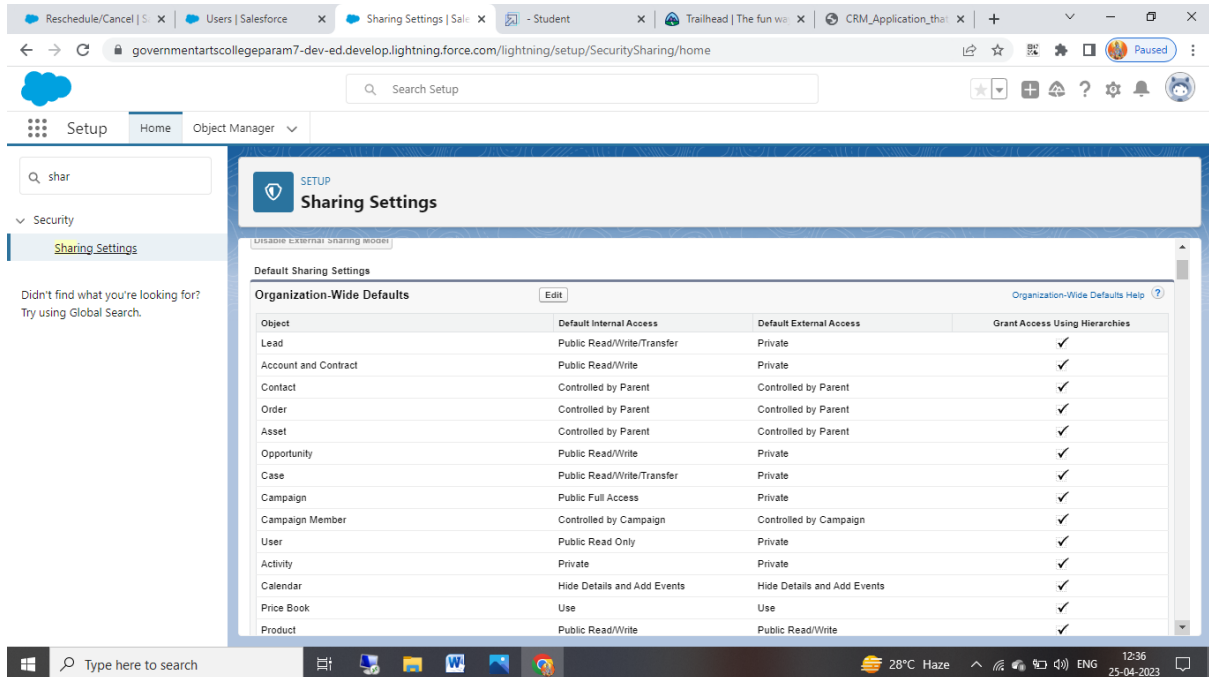
The screenshot shows the Salesforce Setup interface for managing users. The left sidebar contains a navigation menu with options like 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Feature Settings', 'Data.com', 'Prospector Users', 'User Interface', 'Action Link Templates', and 'Actions & Recommendations'. The main content area is titled 'All Users' and includes instructions on how to create, view, and manage users. It also provides links for downloading SalesforceA and performing administrative tasks from mobile devices. A table lists existing users with columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The table contains five rows of user data.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter.00d2w0000r9i9feat.9kunnhrdf55x@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	K.T. Akila	AK.T	akila1t@salesforce.gacpmk		✓	System Administrator
<input type="checkbox"/> Edit	K.T. AKILA	ak.t	ktakila7@gmail.com		✓	Standard User
<input type="checkbox"/> Edit	User Integration	integ	integration@00d2w0000r9i9feat.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightsecurity@00d2w0000r9i9feat.com		✓	Analytics Cloud Security User

## Activity-2:



OWD : organization wide default settings, This can be used to give permissions to the organization wide and it can be used for restrict the access, we can control the record level access



The screenshot shows the Salesforce Setup interface for Sharing Settings. The left sidebar contains a search bar with 'shar' and a list of navigation items including Security and Sharing Settings. The main content area is titled 'Sharing Settings' and includes a 'Default Sharing Settings' section. Below this is a table titled 'Organization-Wide Defaults' with columns for Object, Default Internal Access, Default External Access, and Grant Access Using Hierarchies. The table lists various objects and their corresponding access settings.


Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Product	Public Read/Write	Public Read/Write	✓

## Milestone 6: REPORTS

Reschedule/Cancel | S | x | Users | Salesforce | x | Reports | Salesforce | x | - Student | x | Trailhead | The fun w | x | CRM\_Application\_thai | x | + | - | x

governmentartscollegeparam7-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

Paused



Search...

★

+

?

⚙

🔔

👤

Sales

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Chatter

Groups

More

Reports

Recent

1 item

Search recent reports...

New Report

New Folder

⚙

REPORTS

Recent

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me


FAVORITES

All Favorites

Report Name	Description	Folder	Created By	Created On	Subscribed
Passports with visa slots Report		Private Reports	Akila K T	25/4/2023, 9:59 am	

To Do List

Type here to search



28°C Haze

12:39

25-04-2023

## TRAILHEAD PROFILE PUBLIC URL:

Team lead : <https://trailblazer.me/id/karthikkumarap>

Team member 1: <http://trailblazer.me/id/harim133>

Team member 2: <http://trailblazer.me/id/jegas7>

Team member 3: <http://trailblazer.me/id/mkumaran25>

## ADVANTAGES AND DISADVANTAGES:

### ADVANTAGES:

- Students can gain knowledge to solve a problem and know the solutions.
- Students will gain communication and team-player skills.
- Opportunities for creativity.
- Ability to work on different event.
- Change to work with diverse clients.
- Collaborative work environment.
- High projection for job growth.
- Lot of knowledge base.
- Easy to create events and objects

## **DISADVANTAGES:**

- This project needs a system to fulfil it.
- Sometimes signal is rarely appearing due to server problem.
- Unconventional work hours.
- Time away from family and friends.
- Experience requirements.
- Multiple events at the same time.

- High level of responsibility.

## **APPLICATIONS:**

A CRM system manages all your contacts and aggregates lead and customer information to build profiles of everyone you interact with. This gives you easy access to important information to better understand customer behaviour like purchase records and previous communications with contacts across different channels (chat, email, etc.). Customers won't have to repeat their stories over and over to you, and you'll be able to address issues with best practice and less effort for improved customer loyalty.

## **CONCLUSION:**

In this project salesforce . We learned to create object , knowledge we gained during this project , fields, tab fields, tabs, apps, apps, profile in salesforce project and how to use them systems are powerful tools that help . CRM application that helps us to book visa slot easily. These systems offer a range of features and functionalities that automate many time consuming tasks, streamline communication, enhance attendee engagement future planning. , and provide valuable insights for future bookings.