

A CRM APPLICATION THAT HELPS TO BOOK A VISA SLOT

Project report template

1.INTRODUCTION:

1.1 OVERVIEW:

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

1.2 PURPOSE:

This will help you to track and manage the availability of visa slots, which are appointments that are required for certain visa applications.

2. PROBLEM DEFINITION & DESIGN THINKING:

Problem Definition:

Finding problem statement by using Ideation & Idea prioritization.

Design Thinking:

Design thinking involves five steps:

- Empathize
- Define
- Ideate
- Prototype
- Test

2.1 EMPATHY MAP:

An empathy Map is a simple, easy-to-digest visual that captures knowledge about a user's behavior and attitudes. It is a useful tool to help teams better understand their users.

Creating an effective solution requires understanding the true problem and the person who is experiencing it. The exercise of creating the map helps participants consider things from the user's perspective along with his or her goals and challenges.



Empathy map

Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.



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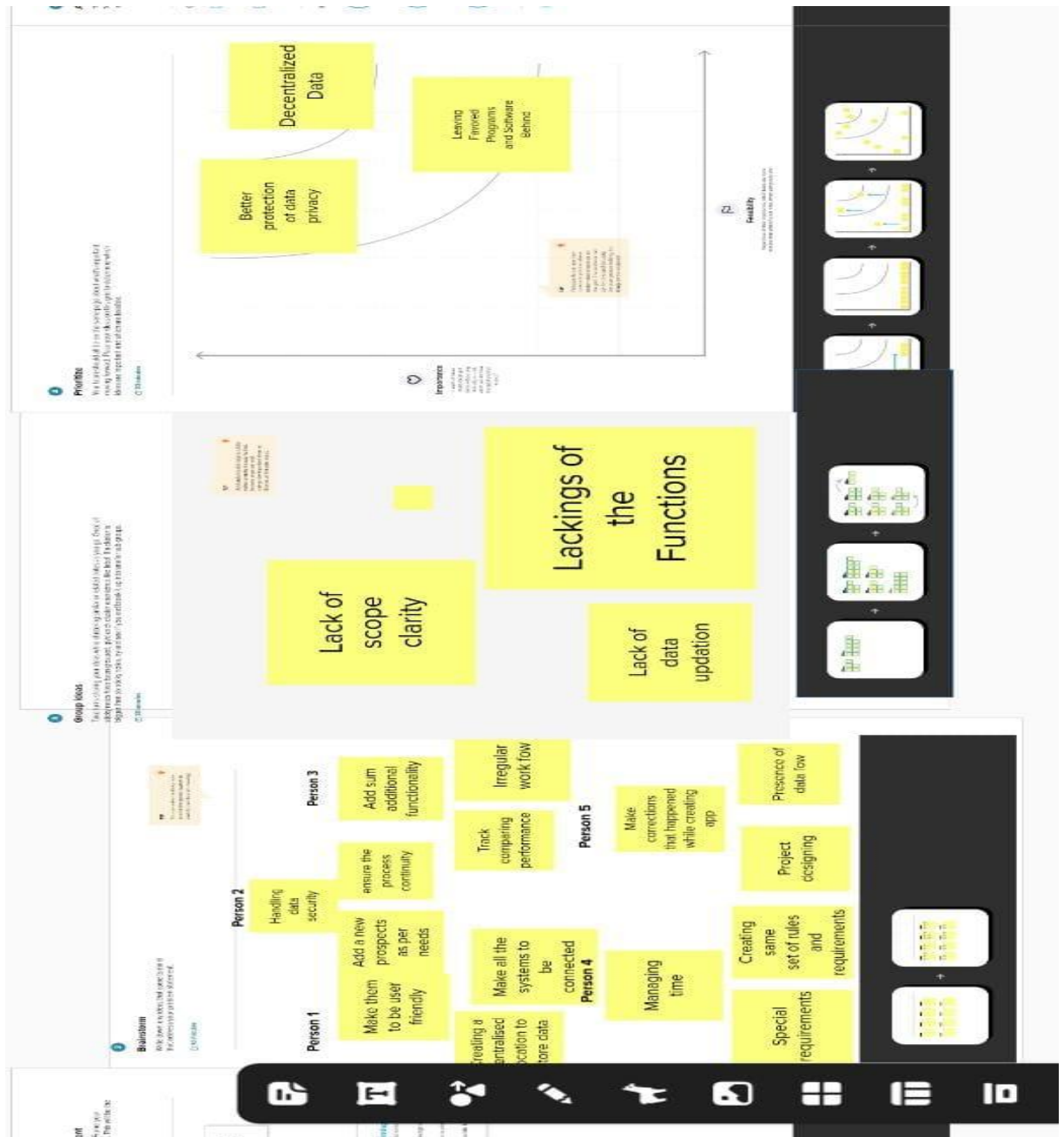
Build empathy

The information you add here should be representative of the observations and research you've done about your users.



2.2 Ideation and brainstorming map

Pasting the ideation and brainstorming map screenshot



3. RESULT:

3.1 DATA MODEL:

OBJECT NAME:	FIELDS IN THE OBJECT	
OBJECT 1:	Field label	Data type
	Passport	Text
	Contact number	Number
OBJECT 2:	Field label	Data type
	Visa Slot	Text

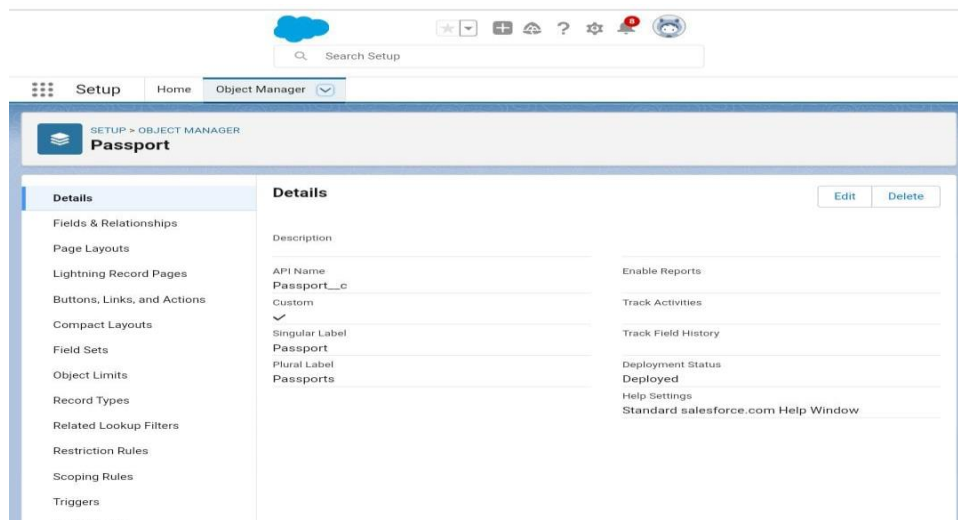
3.2 ACTIVITY & SCREENSHOTS:

Attaching the screenshots of the project “A CRM Application that helps to book a visa slot” along with a description.

MILESTONE 2: OBJECTS:

Activity 1:

Creation of custom object : Passport



Creation of fields on custom object: Passport

The screenshot shows the Salesforce Setup interface for the 'Passport' object. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main area displays a table of fields for the 'Passport' object. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: 0123456789 (Number(18, 0)), Created By (Lookup(User)), Last Modified By (Lookup(User)), Owner (Lookup(User,Group)), Passport Name (Text(80)), and Visa slot (Number(18, 0)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
0123456789	X0123456789__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Passport Name	Name	Text(80)		✓
Visa slot	Visa_passport__c	Number(18, 0)		

Milestone 3: Relationship B/W Objects:

Activity 1:

Creation of relationships:

The screenshot shows the Salesforce Setup interface for the 'Visa slot' object. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main area displays a table of fields for the 'Visa slot' object. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Created By (Lookup(User)), Last Modified By (Lookup(User)), Passport number (Master-Detail(Passport)), and Visa slot Name (Text(80)).

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Passport number	Passport__c	Master-Detail(Passport)		✓
Visa slot Name	Name	Text(80)		✓

Milestone 4 App:

Activity:

Creation of app:

☁️

⚙️

+

🔍

?

🔔

👤

🔍

Search Setup

⚙️

Setup

Home

Object Manager

🔍

App manager

Apps

App Manager

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

SETUP

Lightning Experience App Manager

New Lightning App

New Connected App

Clone Apps(Beta)

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the [Winter '23 release notes](#)

Enable App Cloning ☐ Disabled

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

	App Name	Developer N...	Description	Last ...	App ...	Vi...	
1	All Tabs	AllTabSet		10/04/2...	Classic		
2	Analytics Studio	Insights	Build CRM Analyti...	10/04/2...	Classic	✓	
3	App Launcher	AppLauncher	App Launcher tabs	10/04/2...	Classic	✓	
4	Bolt Solutions	LightningBolt	Discover and man...	10/04/2...	Lightning	✓	
5	Book my visa	Book_my_visa		14/04/2...	Lightning	✓	
6	Community	Community	Salesforce CRM C...	10/04/2...	Classic	✓	
7	Content	Content	Salesforce CRM C...	10/04/2...	Classic	✓	
8	Data Manager	DataManager	Use Data Manager...	10/04/2...	Lightning	✓	
9	Digital Experien...	SalesforceCMS	Manage content a...	10/04/2...	Lightning	✓	
10	Lightning Usag...	LightningInstru...	View Adoption and...	10/04/2...	Lightning	✓	
11	Marketing	Marketing	Best-in-class on-d...	10/04/2...	Classic	✓	
12	Platform	Platform	The fundamental L...	10/04/2...	Classic		
13	Queue Manage...	QueueManage...	Create and manag...	10/04/2...	Lightning	✓	
14	Sales	Sales	The world's most ...	10/04/2...	Classic		
15	Sales	LightningSales	Manage your sales...	10/04/2...	Lightning	✓	
16	Sales Console	LightningSales...	(Lightning Experie...	10/04/2...	Lightning	✓	
17	Salesforce Cha...	Chatter	The Salesforce Ch...	10/04/2...	Classic	✓	
18	Salesforce Sch...	LightningSched...	Set up personalize...	10/04/2...	Lightning	✓	
19	Service	Service	Manage customer ...	10/04/2...	Classic	✓	
20	Service Console	LightningService	(Lightning Experie...	10/04/2...	Lightning	✓	
21	Site.com	Sites	Build pixel-perfect...	10/04/2...	Classic		
22	Subscription M...	RevenueCloudC...	Get started autom...	10/04/2...	Lightning	✓	

App manager

SETUP

Lightning Experience App Manager

New Lightning App

New Connected App

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

*App Name ⓘ

Name your app...

*Developer Name ⓘ

Enter a developer name...

Description ⓘ

Enter a description...

App Branding

Image ⓘ

Upload

Primary Color Hex Value ⓘ

#0070D2

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

Milestone 5 User:

Activity 1:

Creation of User:



Search Setup



Setup

Home

Object Manager

User

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Custom Labels

Density Settings

Global Actions

Global Actions

Publisher Layouts

Lightning App Builder

Lightning Extension

Loaded Console Tab Limit

Path Settings

Quick Text Settings

Record Page Settings

Rename Tabs and Labels

Sites and Domains

Custom URLs

Domains

Sites

Tabs

Themes and Branding

Translation Workbench

Export

Import

Translate

Translation Language Settings

User Interface

User Engagement



SETUP
Users

New User

Help for this Page

User Edit

Save

Save & New

Cancel

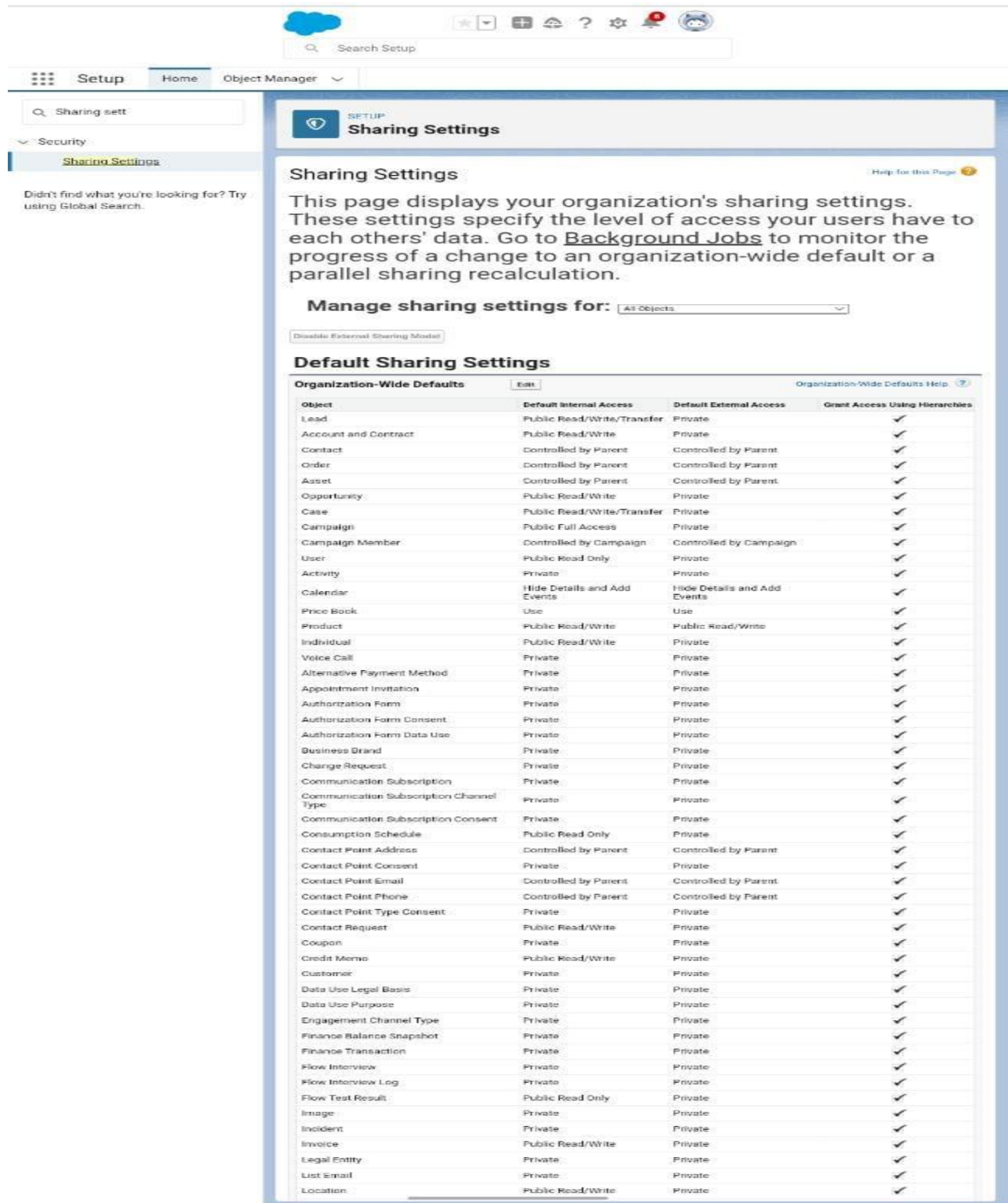
General Information

Required Information

First Name	<input type="text"/>	Role	<None Specified>
Last Name	<input type="text"/>	User License	Force.com - Free
Alias	<input type="text"/>	Profile	Force.com - Free User
Email	<input type="text"/>	Active	<input checked="" type="checkbox"/>
Username	<input type="text"/>	Marketing User	<input type="checkbox"/>
Nickname	<input type="text"/>	Offline User	<input type="checkbox"/>
Title	<input type="text"/>	Knowledge User	<input type="checkbox"/>
Company	<input type="text"/>	Flow User	<input type="checkbox"/>
Department	<input type="text"/>	Service Cloud User	<input type="checkbox"/>
Division	<input type="text"/>	Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	-None-
		Data.com Monthly Addition Limit	Default Limit (300)
		Accessibility Mode (Classic Only)	<input type="checkbox"/>
		High-Contrast Palette on Charts	<input type="checkbox"/>
		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
		Debug Mode	<input type="checkbox"/>
		Quick Access Menu	<input checked="" type="checkbox"/>
		Salesforce CRM Content User	<input type="checkbox"/>
		Receive Salesforce CRM Content Email Alerts	<input type="checkbox"/>
		Receive Salesforce CRM Content Alerts as Daily Digest	<input type="checkbox"/>
		Allow Forecasting	<input type="checkbox"/>
		Call Center	<input type="text"/>
		Phone	<input type="text"/>
		Extension	<input type="text"/>
		Fax	<input type="text"/>
		Mobile	<input type="text"/>
		Email Encoding	Unicode (UTF-8)
		Employee Number	<input type="text"/>

Activity 2:

OWD: Organization wide default settings:



The screenshot shows the Salesforce Setup interface for Sharing Settings. The left sidebar contains navigation links for Setup, Home, and Object Manager. The main content area is titled "Sharing Settings" and includes a search bar, a "Manage sharing settings for:" dropdown menu, and a "Default Sharing Settings" table. The table lists various objects and their default internal and external access levels, along with a checkbox for "Grant Access Using Hierarchies".

Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for:

[Download External Sharing Model](#)

Default Sharing 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	✓
Individual	Public Read/Write	Private	✓
Voice Call	Private	Private	✓
Alternative Payment Method	Private	Private	✓
Appointment Invitation	Private	Private	✓
Authorization Form	Private	Private	✓
Authorization Form Consent	Private	Private	✓
Authorization Form Data Use	Private	Private	✓
Business Brand	Private	Private	✓
Charge Request	Private	Private	✓
Communication Subscription	Private	Private	✓
Communication Subscription Channel Type	Private	Private	✓
Communication Subscription Consent	Private	Private	✓
Consumption Schedule	Public Read Only	Private	✓
Contact Point Address	Controlled by Parent	Controlled by Parent	✓
Contact Point Consent	Private	Private	✓
Contact Point Email	Controlled by Parent	Controlled by Parent	✓
Contact Point Phone	Controlled by Parent	Controlled by Parent	✓
Contact Point Type Consent	Private	Private	✓
Contact Request	Public Read/Write	Private	✓
Coupon	Private	Private	✓
Credit Memo	Public Read/Write	Private	✓
Customer	Private	Private	✓
Data Use Legal Basis	Private	Private	✓
Data Use Purpose	Private	Private	✓
Engagement Channel Type	Private	Private	✓
Finance Balance Snapshot	Private	Private	✓
Finance Transaction	Private	Private	✓
Flow Interview	Private	Private	✓
Flow Interview Log	Private	Private	✓
Flow Test Result	Public Read Only	Private	✓
Image	Private	Private	✓
Incident	Private	Private	✓
Invoice	Public Read/Write	Private	✓
Legal Entity	Private	Private	✓
List Email	Private	Private	✓
Location	Public Read/Write	Private	✓



Search Setup



Setup

Home

Object Manager



Sharing sett.

Security

Sharing Settings

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



SETUP

Sharing Settings

Basic	Private	Private	<input checked="" type="checkbox"/>
Data Use Purpose	Private	Private	<input checked="" type="checkbox"/>
Engagement Channel Type	Private	Private	<input checked="" type="checkbox"/>
Finance Balance Snapshot	Private	Private	<input checked="" type="checkbox"/>
Finance Transaction	Private	Private	<input checked="" type="checkbox"/>
Flow Interview	Private	Private	<input checked="" type="checkbox"/>
Flow Interview Log	Private	Private	<input checked="" type="checkbox"/>
Flow Test Result	Public Read Only	Private	<input checked="" type="checkbox"/>
Image	Private	Private	<input checked="" type="checkbox"/>
Incident	Private	Private	<input checked="" type="checkbox"/>
Invoice	Public Read/Write	Private	<input checked="" type="checkbox"/>
List Email	Private	Private	<input checked="" type="checkbox"/>
Location	Public Read/Write	Private	<input checked="" type="checkbox"/>
Location Group	Public Read/Write	Private	<input checked="" type="checkbox"/>
Macro	Private	Private	<input checked="" type="checkbox"/>
Macro Usage	Private	Private	<input checked="" type="checkbox"/>
Messaging Session	Public Read/Write	Private	<input checked="" type="checkbox"/>
Messaging User	Public Read/Write	Private	<input checked="" type="checkbox"/>
Orchestration Run	Private	Private	<input checked="" type="checkbox"/>
Orchestration Stage Run	Private	Private	<input checked="" type="checkbox"/>
Orchestration Step Run	Private	Private	<input checked="" type="checkbox"/>
Orchestration Work Item	Private	Private	<input checked="" type="checkbox"/>
Party Consent	Private	Private	<input checked="" type="checkbox"/>
Problem	Private	Private	<input checked="" type="checkbox"/>
Process Exception	Private	Private	<input checked="" type="checkbox"/>
Promotion	Private	Private	<input checked="" type="checkbox"/>
Promotion Segment	Private	Private	<input checked="" type="checkbox"/>
Queue	Public Read/Write	Private	<input checked="" type="checkbox"/>
Queued Party	Public Read/Write	Private	<input checked="" type="checkbox"/>
Queue Messaging Template	Public Read/Write	Private	<input checked="" type="checkbox"/>
Quick Text	Private	Private	<input checked="" type="checkbox"/>
Quick Text Usage	Private	Private	<input checked="" type="checkbox"/>
Return Order	Private	Private	<input checked="" type="checkbox"/>
Seller	Private	Private	<input checked="" type="checkbox"/>
Service Appointment	Public Read/Write	Private	<input checked="" type="checkbox"/>
Service Contract	Private	Private	<input checked="" type="checkbox"/>
Service Resource	Public Read/Write	Private	<input checked="" type="checkbox"/>
Service Territory	Public Read/Write	Private	<input checked="" type="checkbox"/>
Shift	Private	Private	<input checked="" type="checkbox"/>
Streaming Channel	Public Read/Write	Private	<input checked="" type="checkbox"/>
Web Cart Document	Private	Private	<input checked="" type="checkbox"/>
Work Order	Private	Private	<input checked="" type="checkbox"/>


Milestone 6 Reports:








Activity 1:


Creation of reports:

Create Report

Category	Select a Report Type	
Recently Used	<div>Q Search Report Types...</div>	
All	Report Type Name	Category
Accounts & Contacts	Accounts	Standard
Opportunities	Contacts & Accounts	Standard
Customer Support Reports	Accounts with Partners	Standard
	Account with Account Teams	Standard
Leads	Accounts with Contact Roles	Standard
Campaigns	Accounts with Assets	Standard
Activities	Contacts with Assets	Standard
Contracts and Orders	Account History	Standard
	Contact History	Standard
Price Books, Products and Assets	D&B Company with and without Accounts	Standard
Administrative Reports	Opportunities	Standard
File and Content Reports	Opportunities with Products	Standard
	Opportunities with Contact Roles	Standard
Individuals	Opportunities with Partners	Standard
Other Reports	Opportunities with Competitors	Standard
	Opportunity History	Standard
Hidden Report Types	Opportunity Field History	Standard
	Opportunity Trends	Standard
	Opportunities with Contact Roles and Products	Standard




Sales

Home

Opportunities

Leads


Tasks

Files


Accounts


Reports


More





Report: Accounts
Passport with visa location


Enable Field Editing




Add Chart





Edit


Total Records
12








	Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	-	Sahaya Satheesh S	GenePoint	CA	Customer - Channel	Cold	13/04/2023
2	-	Sahaya Satheesh S	United Oil & Gas, UK	UK	Customer - Direct	-	13/04/2023
3	-	Sahaya Satheesh S	United Oil & Gas, Singapore	Singapore	Customer - Direct	-	13/04/2023
4	-	Sahaya Satheesh S	Edge Communications	TX	Customer - Direct	Hot	13/04/2023
5	-	Sahaya Satheesh S	Burlington Textiles Corp of America	NC	Customer - Direct	Warm	13/04/2023
6	-	Sahaya Satheesh S	Pyramid Construction Inc.	-	Customer - Channel	-	13/04/2023
7	-	Sahaya Satheesh S	Dickenson plc	KS	Customer - Channel	-	13/04/2023
8	-	Sahaya Satheesh S	Grand Hotels & Resorts Ltd	IL	Customer - Direct	Warm	13/04/2023
9	-	Sahaya Satheesh S	Express Logistics and Transport	OR	Customer - Channel	Cold	13/04/2023
10	-	Sahaya Satheesh S	University of Arizona	AZ	Customer - Direct	Warm	13/04/2023
11	-	Sahaya Satheesh S	United Oil & Gas Corp.	NY	Customer - Direct	Hot	13/04/2023
12	-	Sahaya Satheesh S	sForce	CA	-	-	13/04/2023

Milestone 7 Dashboards:


Activity:

Creation of dashboards:





Q Search...

Sales

Home

Opportunities ▾

Leads ▾


Tasks ▾


Files ▾

Accounts ▾

Dashboards ▾


More ▾





Passport with visa location

+ Component

+ Filter








Save ▾

Done

Passport with visa location×

Las...	Ac...	Account Name	Billin...	Type
-	Saha ya Sath eesh S	GenePoint	CA	Custe
-	Saha ya Sath eesh S	United Oil & Gas, UK	UK	Custe
-	Saha	United Oil & Gas,	Singa	Custe

View Report (Passport with visa location)

Add Component

Report

Passport with visa location

☐ Use chart settings from report

Display As

123

Groups

Add group...

Columns

Add column...

Last Activity

Account Owner

Account Name

Billing State/Province

Type

Sort By

Last Activity

Display Units

Shortened Number

- ☐ Show Chatter Photos
- ☐ Show Total
- ☐ Add Conditional Highlighting

Decimal Places

Automatic

Custom Link

Max Groups Displayed

100

Title

Passport with visa location

Subtitle

Preview

Passport with visa location

Las...	Accou...	Account Name	Billing St...	Type
-	Sahaya Satheesh S	GenePoint	CA	Customer
-	Sahaya Satheesh S	United Oil & Gas, UK	UK	Customer
-	Sahaya Satheesh S	United Oil & Gas, Singapore	Singapore	Customer

View Report (Passport with visa location)

4. TRAILHEAD PROFILE PUBLIC URL

- Team leader : <https://trailblazer.me/id/preep6>
- Team member 1 : <https://trailblazer.me/id/muthm28>
- Team member 2 : <https://trailblazer.me/id/nands53>
- Team member 3 : <https://trailblazer.me/id/ramyp25>
- Team member 4 : <https://trailblazer.me/id/strailhead>

5. ADVANTAGES & DISADVANTAGE:

List of advantages and disadvantages of the proposed solution.

ADVANTAGES	DISADVANTAGES
<ul style="list-style-type: none">• Helps the students to improve their knowledge.	<ul style="list-style-type: none">• Most of the students doesn't have laptop to do their project.
<ul style="list-style-type: none">• Lead a way create job opportunity.	<ul style="list-style-type: none">• Internet problem
<ul style="list-style-type: none">• Got an idea about project development process.	<ul style="list-style-type: none">• Fear to chat with Salesforce administrator.
<ul style="list-style-type: none">• Creating Empathy map.	<ul style="list-style-type: none">• Log in & Sign Up problems.

6. APPLICATIONS:

The area where this solution can applied.

1. Improving customer interaction
2. It helps to develop a new application
3. It helps to create an object

7. Conclusion:

- This Naan Mudhalvan scheme is a student upskilling initiative aiming for equality in quality and its eligibility. It allows online study access to different foundation courses.
- Using, Salesforce we can close more deals quickly and create strong customer relations.
- CRM Application is the pathway to create strong relationship with customer.

8. Future Scope:

The scope of CRM includes a wide range of activities, from managing customer contact information to developing personalized marketing campaigns. Building a working relationship with customers is key to the long-term success of a business. Thus, CRM plays a vital role in future .