

BHARATHI WOMEN'S COLLEGE (AUTONOMOUS)

CHENNAI-600108

**A PROJECT
ON
CRM APPLICATION THAT HELPS TO BOOK A
VISA SLOT**

BY

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1. INTRODUCTION

1.1 OVERVIEW

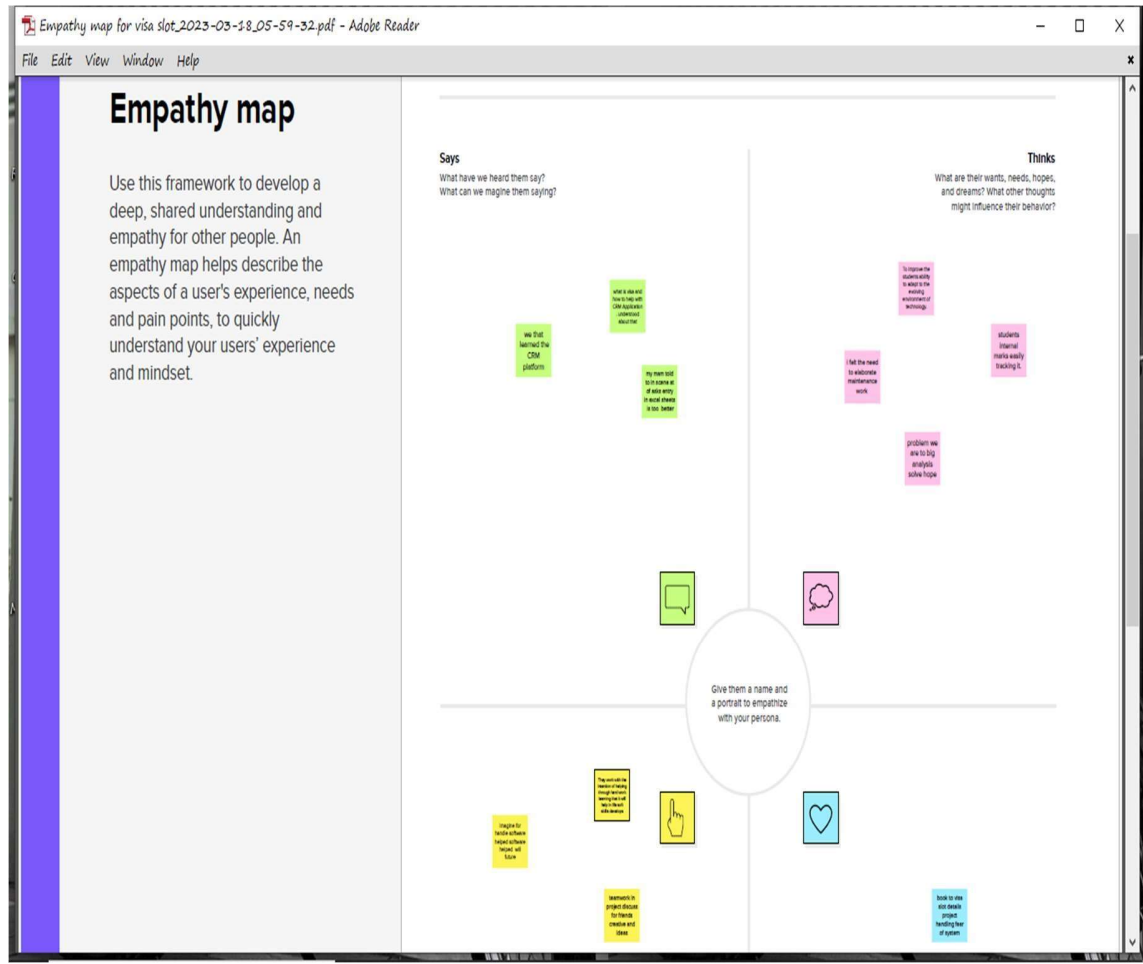
A visa slot management project is a system that is used to track and manage the availability of visa slots. Fellow man application that helps to visa slot hand can do CRM application the salesforce purpose overview

1.2 PURPOSE

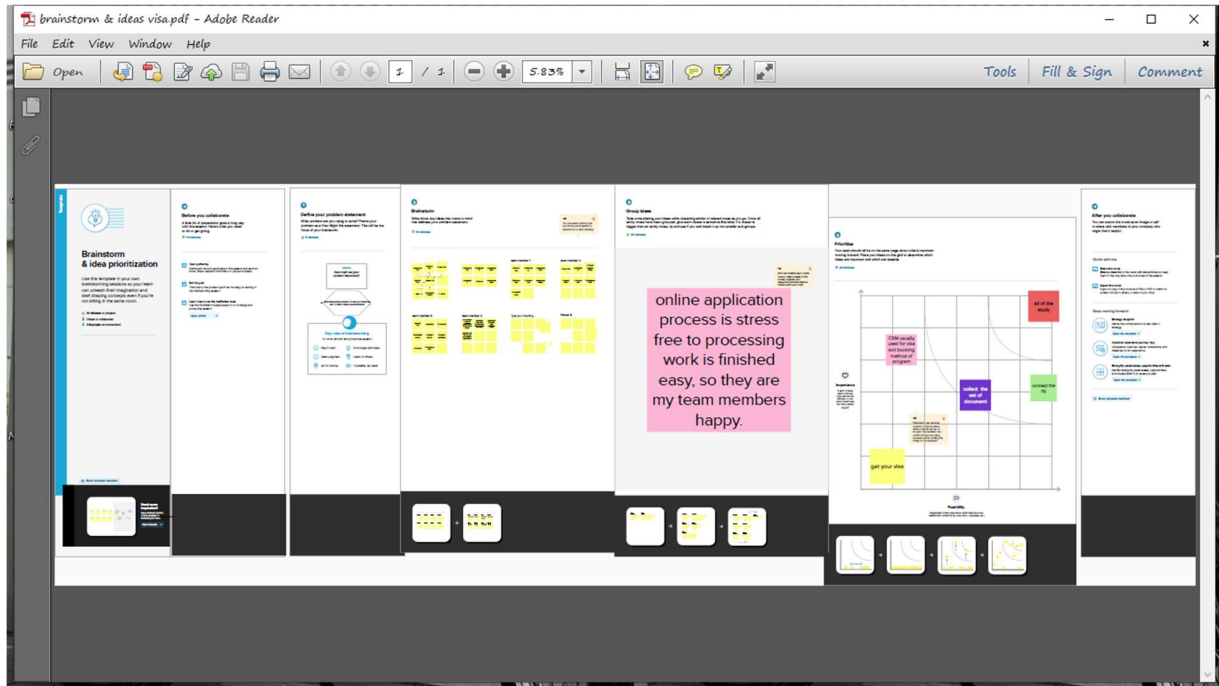
Practice, strategies, and technologies that companies use to manage and analyze customer interactions and data throughout the customer lifecycle will do this project without someone's help and knowledge about this project.

2. PROBLEM DEFINITION AND DESIGNING THINKING

2.1 EMPATHY MAP



2.2 IDEATION & BRAINSTORMING MAP



3.RESULT

3.1 DATA MODEL

Object Name	Field in the Object	
Passport	Field label	Data type
	Contact number	Number
	Passport Name	Text
	Passport Name	Text
Visa Slot	Field label	Data type
	Visa Slot Name	Text
	Visa Slot Number	Text
Rescheduled/Cancel	Field label	Data type
	Rescheduled/cancel	Text
	Time	Number
Payment	Field label	Data type
	Card number	Text
	Transaction cancel	Text

3.2 ACTIVITY & SCREENSHOT:

Milestone 1: Salesforce

Creation of developer org

Activity-1: Creating Developer Account

1. Go to developers.salesforce.com/
2. Click on Sign up.
3. On the signup form, enter the following details:
 - First name & Last name
 - Email
 - Role: Developer
 - Company: College Name
 - County: India
 - Postal Code: pin code
 - Username: should be a combination of your name and company

This need not be an actual email ID, you can give anything in format:

username@organization.com

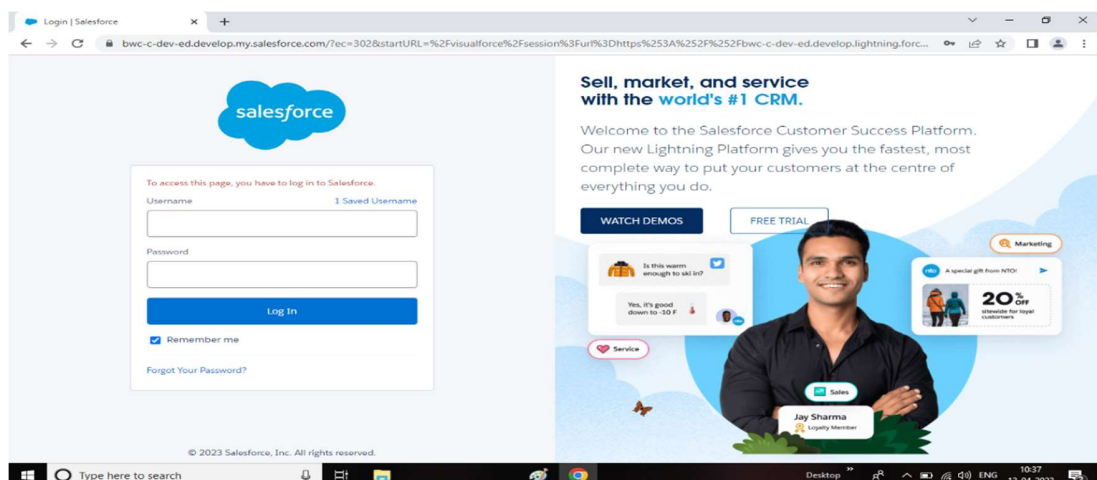
Click on sign up after filling in these.

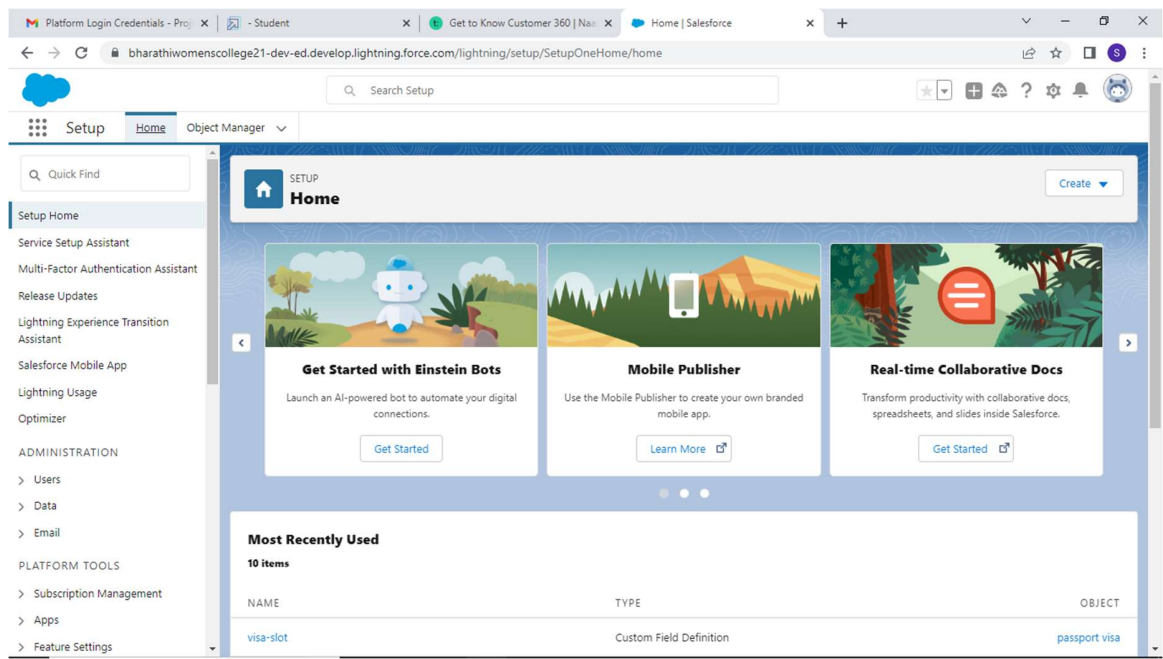
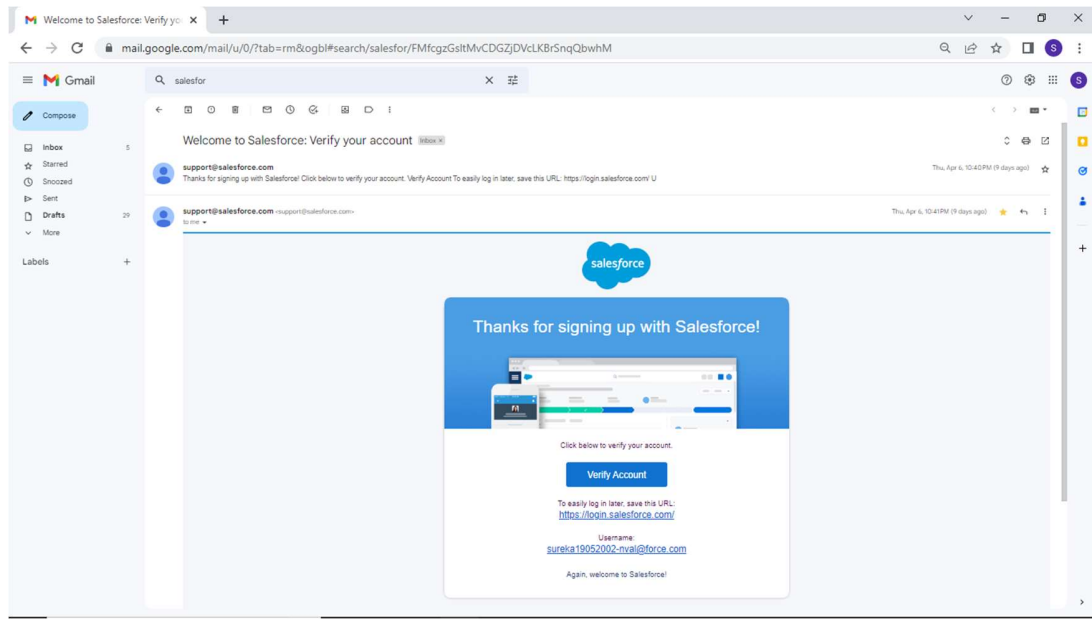
Account Activation

Go to the inbox of the email that you used while signing up. Click on the verified account to activate your account.

Login To Your Salesforce Account

1. Go to salesforce.com and click on login.
2. Enter the username and password that you just created.
3. After logging in this is the home page which you will see.



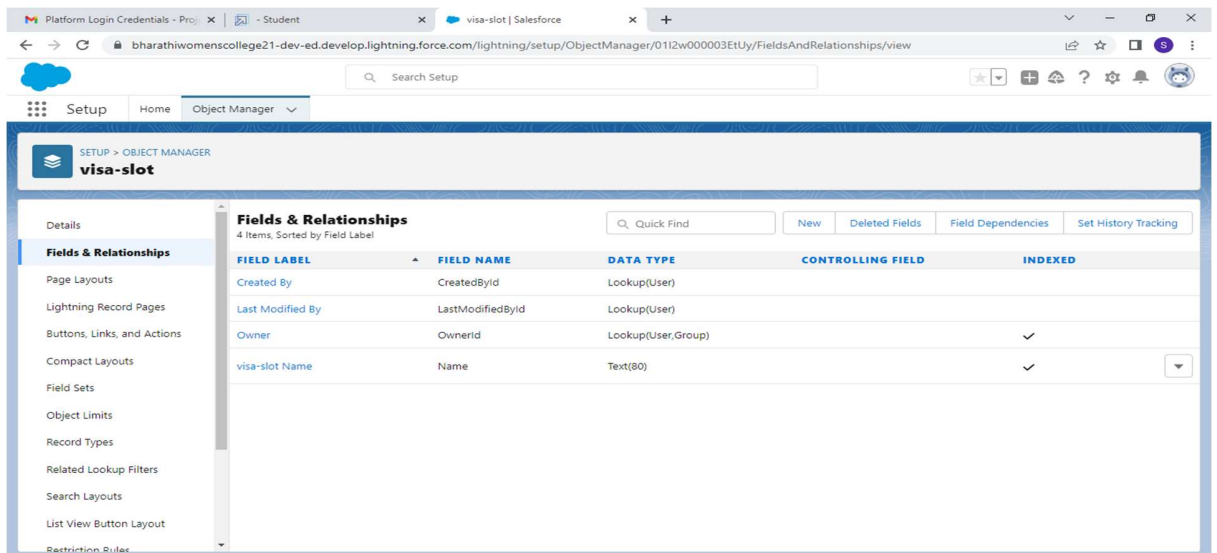


Milestone 2: Objects

Activity-1: Creation of customer object: Passport

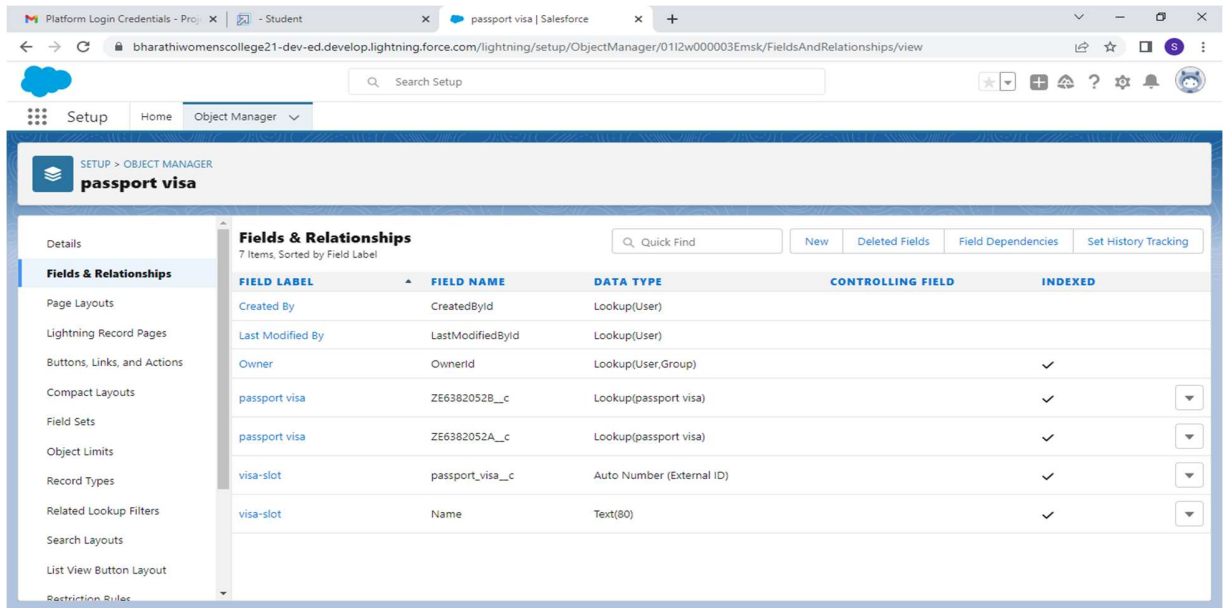
- 1) Navigate to setup and select object manager
- 2) At the top of the right side there you can find create a custom object
- 3) You will navigate to the custom object definition edit where have to give the object
- 4) The label name has Passport and the Plural label has Passports
- 5) In enter record name label and format enter name record name has passport number
- 6) And the data type has text.
- 7) In deployment status select a deployed option.
- 8) Ensure that you have selected at least one option in the object creation option; it is available only once when a custom object is created.
- 9) Then click on next you will navigate to the new custom object tab where you have to select tab style and click on next
- 10) After tab selection you will be navigated to add to profiles select default on click on next.
- 11) Thereafter you have to select a custom app select include tab so that object will be available in all objects and select save option.

Activity 2: Fields available on custom object: Passport



The screenshot displays the Salesforce Setup interface for a custom object named 'Passport'. The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The main content area shows a table of fields for the 'Passport' object, sorted by Field Label. The table has five columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are 'Created By', 'Last Modified By', 'Owner', and 'Passport Name'.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Passport Name	Name	Text(80)		✓



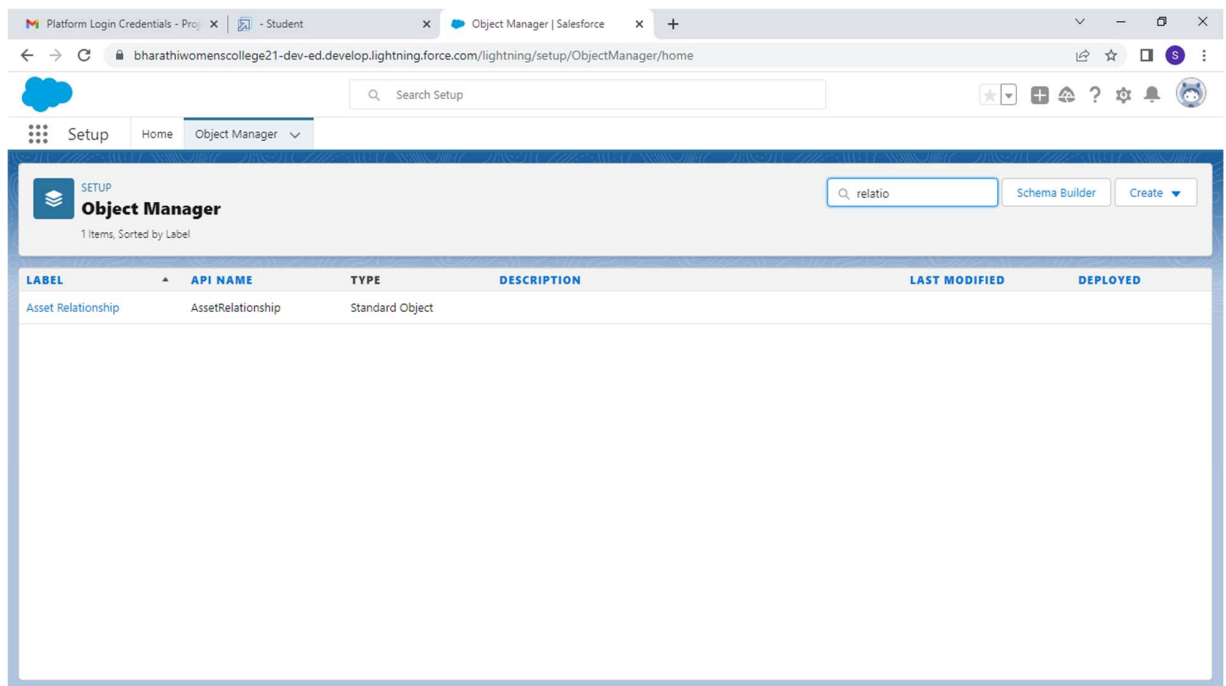
- 1) Select your object from object selection has passport
- 2) And select the option fields and relationships
- 3) At the top right side you can find a new select that option.
- 4) Now you have to select data type, select number has data type.
- 5) And you will navigate to enter the details page where you give the field label
- 6) And give the label name has Contact number.
- 7) And length should be 10 at the bottom of the object you can find options like required, unique, external ID select required option so that always require a value in this field in order to save.
- 8) Click next you will navigate to field level security click on visible checkbox so that it is visible to all profiles.
- 9) Select the next option, select the page layout and save it.

Milestone-3: Relationship B/W Objects

Activity 1: Creation of relationship

To create a Master Detail relationship between Passport and Visa.

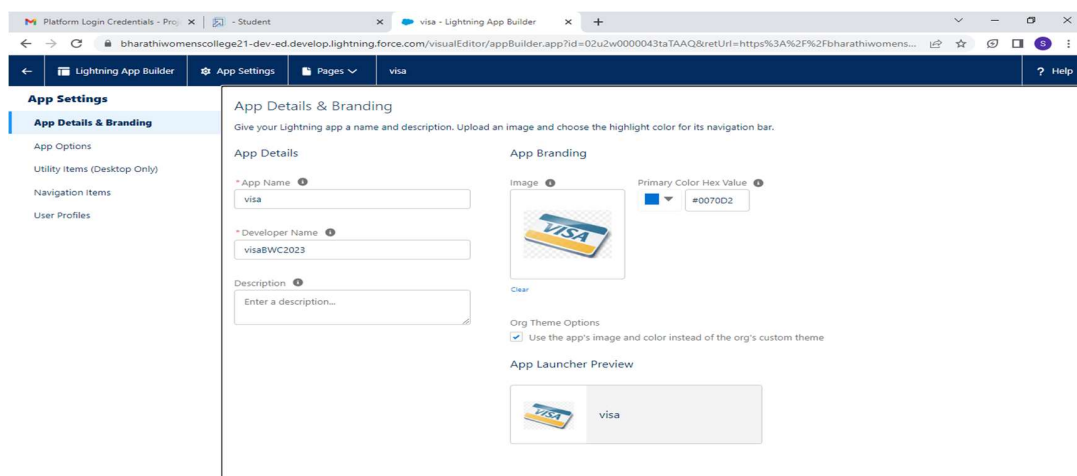
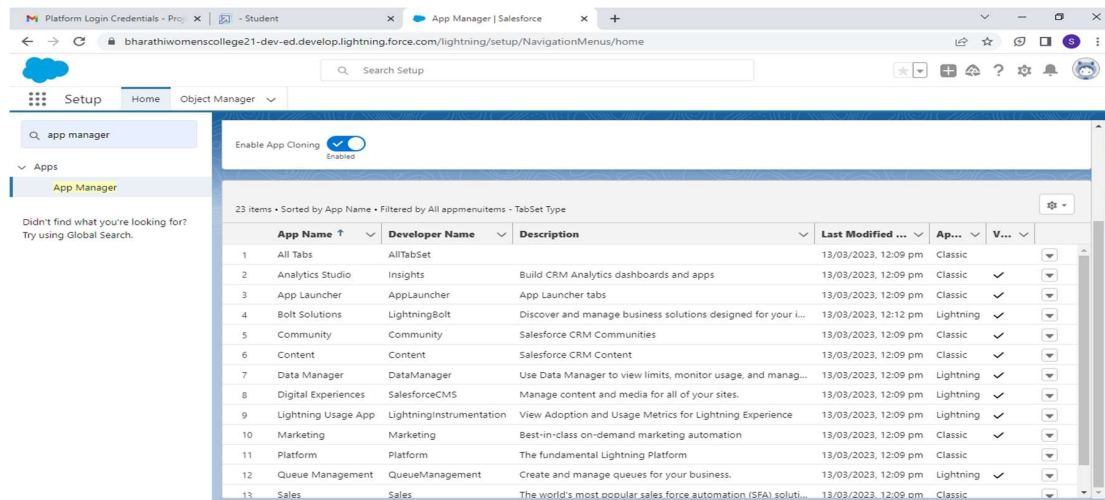
- 1) Go to the SetUp option from the Home Page and click on it.
- 2) Go to the object manager and select 'visa' object from the list
- 3) And select fields and relationships and click on new.
- 4) Select the data type that has a Master detail relationship
- 5) And select related to the object that has a passport, and click on next
- 6) You will navigate to the label name page where you give the label name for the field, give it has passport number, and click next.
- 7) Select visible for all profiles in field level security and select page layout in the next page and save it.



Millstone 4: App

Activity

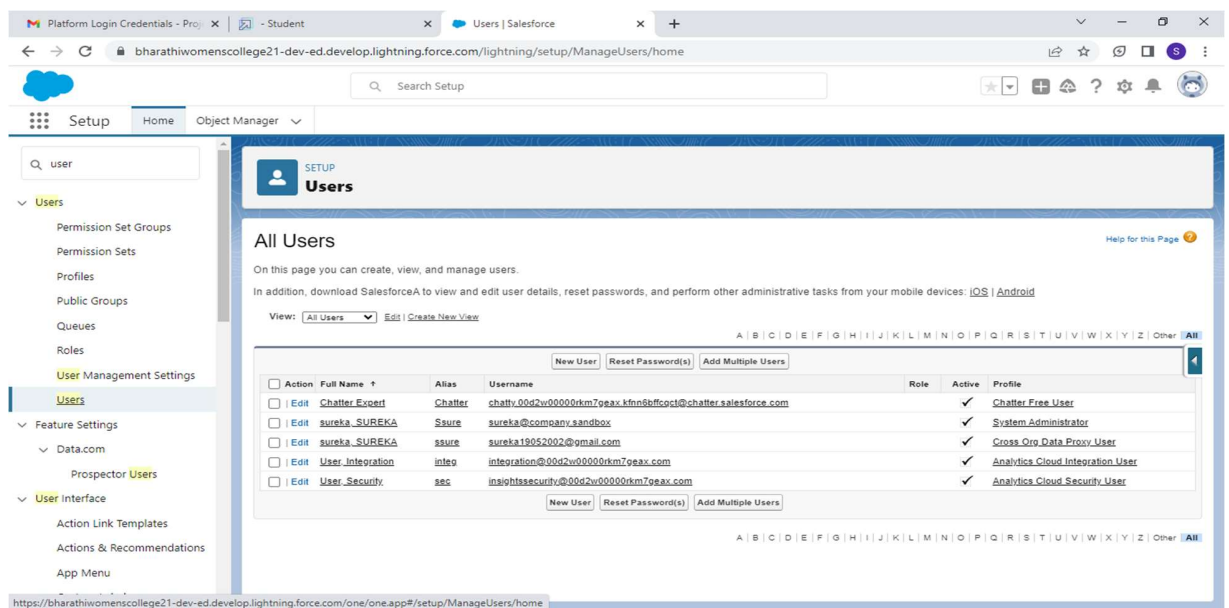
- 1) Navigate to setup and search for app manager
- 2) And select an option for a new lightning app.
- 3) Give the app name has book my visa.
- 4) Upload the picture and click next.
- 5) Choose the app option as navigation style- standard navigation, support from factors-desktop & mobile and select next.
- 6) And move the objects from available items to selected items.
- 7) Passport, visa slots, payments, reschedule/cancel to selected items.
- 8) And system admin profile to available items to selected items.



Milestone-5 User

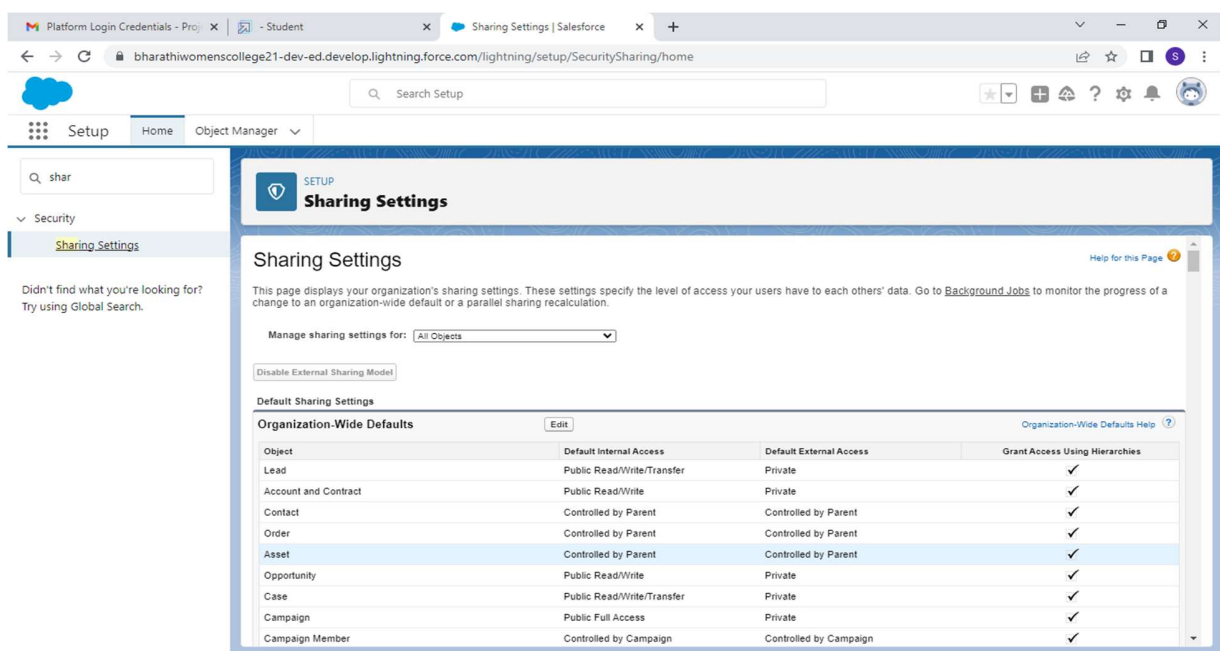
Activity-1: Creation of User

- 1) Navigate to set up in the quick find search bar
- 2) Type user in and select it and click on new user.
- 3) Give the first name and last name.
- 4) Enter your email in the email field.
- 5) Enter username; it must be unique.
- 6) Select the user license of Salesforce.
- 7) In the profile field select standard user.
- 8) At the bottom of the page check the box to generate a new password and notify the user immediately.



Activity-2:

- 1) Navigate to setup in quick find search bar
- 2) Type sharing settings and you will navigate to the sharing settings page.
- 3) Go down to the page and select owd
- 4) And click edit on the owd.
- 5) Navigate to the bottom of the page and select the passport object.
- 6) And change the default external access to public/Read/write.



The screenshot shows the Salesforce Sharing Settings page. The left sidebar contains a search bar with 'shar' entered and a 'Security' section with 'Sharing Settings' selected. The main content area is titled 'Sharing Settings' and includes a 'Manage sharing settings for' dropdown set to 'All Objects'. Below this is a table of 'Default Sharing Settings' for various objects. The 'Asset' object is highlighted, and its 'Default External Access' is set to 'Controlled by Parent'. The 'Passport' object is at the bottom of the list.

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	✓

Milestone-6 Reports

- 1) Click on the app launcher and search for reports
- 2) And select a new report, for the record type category select other reports.
- 3) Select passport with visa slots for the report type name.
- 4) Select the start button to create a new report.
- 5) At the left side of the report you can find an outline pane.
- 6) In the group rows select location.
- 7) In the group columns select passport:passport number to display.
- 8) And in columns select visa slot number.
- 9) Now navigate to the filter pane available next to the outline pane and ensure in the show me section all passports is selected.
- 10) And in the passport created date select all time.
- 11) And give the label name Passports with visa locations.
- 12) Click on save and run for saving the report.

The screenshot shows the Salesforce Setup interface. On the left, the 'Setup' menu is open, showing 'Feature Settings' > 'Analytics' > 'Reports & Dashboards' > 'Report Types' selected. The main content area is titled 'Report Types' and shows a 'Custom Report Type' definition for 'passport with visa locations'. The definition table includes the following details:

Custom Report Type Definition		Report Type Category	Campaigns
Report Type Label	passport with visa locations	Deployment Status	Deployed
Report Type Name	passports_with_visa_slots_with_payments		
Description	Find out which flows get executed and how long users take to complete each flow screen.		
Created By	Automated Process, 13/03/2023, 12:09 pm	Modified By	SUREKA.sureka, 05/04/2023, 7:15 pm

Below the definition table, the 'Object Relationships' section shows a Venn diagram with two overlapping circles, A and B. Circle A is labeled 'Flow Interview Logs (A)' and circle B is labeled 'Flow Interview Log Entries (B)'. The text below the diagram states: 'with at least one related record from Flow Interview Log Entries (B)'.

Milestone-7 Dashboards:

- 1) Click on the app launcher and search for dashboards.
- 2) Select the new dashboard option.
- 3) Name the dashboard has a Passport with visa locations
- 4) And select create option
- 5) Now click on Add component and for report select passport with locations.
- 6) Select the donut chart in display as section.
- 7) Ensure that value is record count and sliced by locations
- 8) Leave the default values.
- 9) Click on add.
- 10) And save the dashboard

The screenshot shows the Salesforce Setup interface. At the top, there's a search bar labeled "Search Setup" and a navigation bar with "Setup", "Home", and "Object Manager". On the left sidebar, under "Feature Settings", the "Reports & Dashboards" section is expanded, showing options like "Access Policies", "Historical Trending", "Report Types", "Reporting Snapshots", and "Reports and Dashboards Settings" (which is selected). The main content area is titled "Reports and Dashboards Settings" and contains several sections of settings:

- User Interface**:
 - ☒ Enable Floating Report Headers (Salesforce Classic only)
 - ☒ Enable Dashboard Finder [i](#)
 - ☐ Hides the option to export a report in XLS format in Lightning Experience
 - ☒ Enable Inline Editing in Reports (Lightning Experience Only)
- Confidential Information Disclaimer Settings**:

Specify whether or not to exclude a disclaimer that says "Confidential Information - Do Not Distribute" from report footers.

 - ☐ Exclude Disclaimer from Formatted Report Exports in Lightning Experience
 - ☐ Exclude Disclaimer from Report Run Pages and from Printable View Pages (Salesforce Classic Only)
- Chatter Options**:
 - ☐ Enable Dashboard Component Snapshots [i](#)
- Unified Analytics Home**:
 - ☒ Show preview thumbnails for reports and lightning dashboards [i](#)
 - ☐ Enable the Unified Experience for Analytics Home [i](#)

At the bottom left of the sidebar, there's a message: "Didn't find what you're looking for? Try using Global Search."

4. TRAILHEAD PROFILE PUBLIC URL

Team Lead -<https://traiblazer.me/id/sureka2023visa>

Team Member 1 -<https://traiblazer.me/id/cranjanisP>

Team Member 2 -<https://traiblazer.me/id/ssrrenuka>

Team Member 3 -<https://traiblazer.me/id/rrsandhiya>

Team Member 4 -<https://traiblazer.me/id/soraj32>

5. ADVANTAGES & DISADVANTAGES:

ADVANTAGES

- Tracking of the customer data
- Benefit the customer service
- Helps in increasing arrival customer
- CRM made tracking visa slot

DISADVANTAGES

- An CRM application is cost project
- Not suitable for every business but suitable for CRM application
- Employs training is must
- Limited number of regular visa apply across visa slot

6. APPLICATIONS

- Letterhead of company
- Travel dates
- The duration of the trip
- The visa type you are applying
- Contact information of the employer

7. CONCLUSION

Satisfaction customer retention at the salesforce CRM. With the ability to integrate with other salesforce products, such as service cloud, salesforce visa slot booking can provide a comprehensive view of a customer's entire experience with an organization.

8. FUTURE SCOPE

It might be used by a government agency or a visa processing to schedule and manage appointments with applicants. It helps when you go to work. Used for visa slot booking method of the program.