

BHARATHI WOMEN'S COLLEGE (AUTONOMOUS)

CHENNAI-600108

CRM Application That helps to Book a Visa Slot

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INTRODUCTION:

1.1 OVERVIEW:

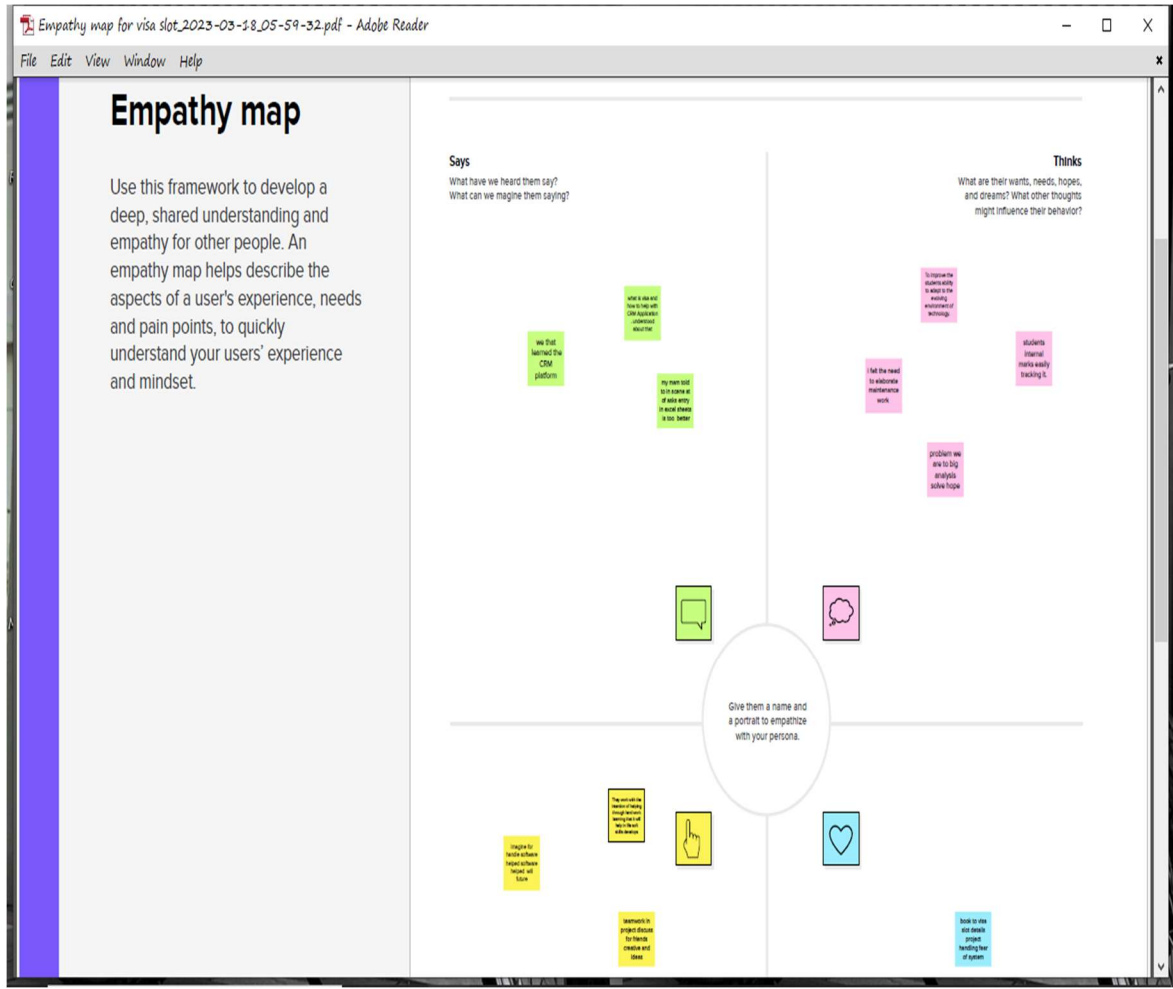
- ▶ A visa slot management project is a system that is used to track and manage the availability of visa slot.
- ▶ Fellow man application that helps to visa slot hand can do CRM application the salesforce purpose overview

1.2 PURPOSE:

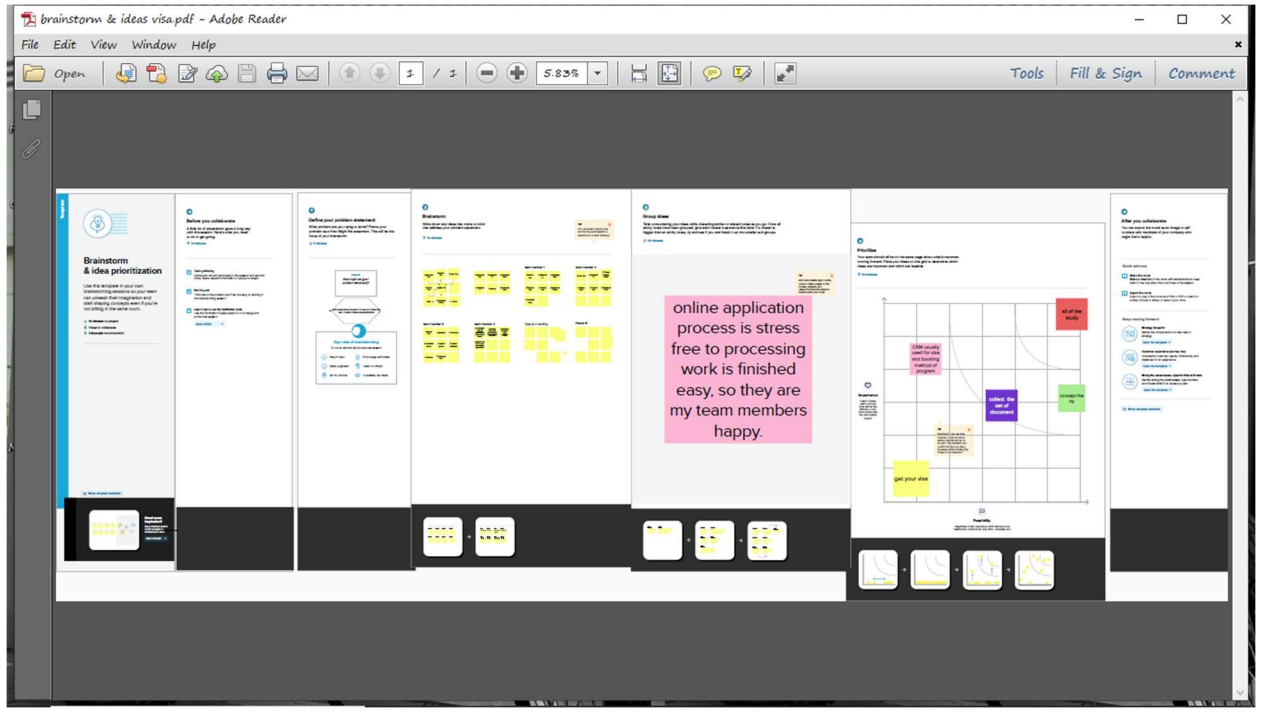
- ▶ practice, strategies and technologies that companies use to manage and analyse customer interactions and data throughout the customer lifecycle
- ▶ ill do this project without someone help
- ▶ will knowledges about this project.

Problem Definition and Design Thinking

2.1 EMPATHY MAP:



2.2 Ideation Brainstorming Map:



RESULT:

3.1 Data Model:

Object Name	Field in the Object	
Passport	<u>Field label</u>	<u>Data type</u>
	Contact number	<u>number</u>
	Passport name	text
	Passport name	<u>text</u>
<u>Visa slot</u>	<u>Field label</u>	<u>Data type</u>
	Visa slot name	text
	Visa slot number	text
Rescheduled/cancel	Field label	Data type

	Rescheduled/cancel	<u>text</u>	
	Time	<u>Number</u>	
Payment	Field label	Data type	
	Card number	text	
	Transaction cancel	text	

3.2 Activity & Screenshot :

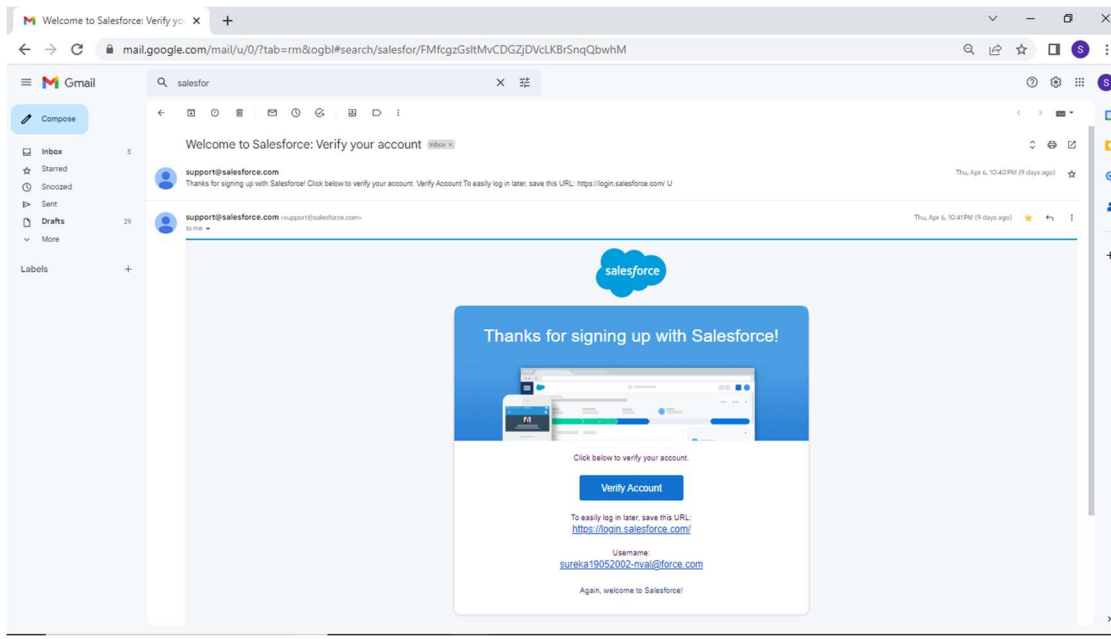
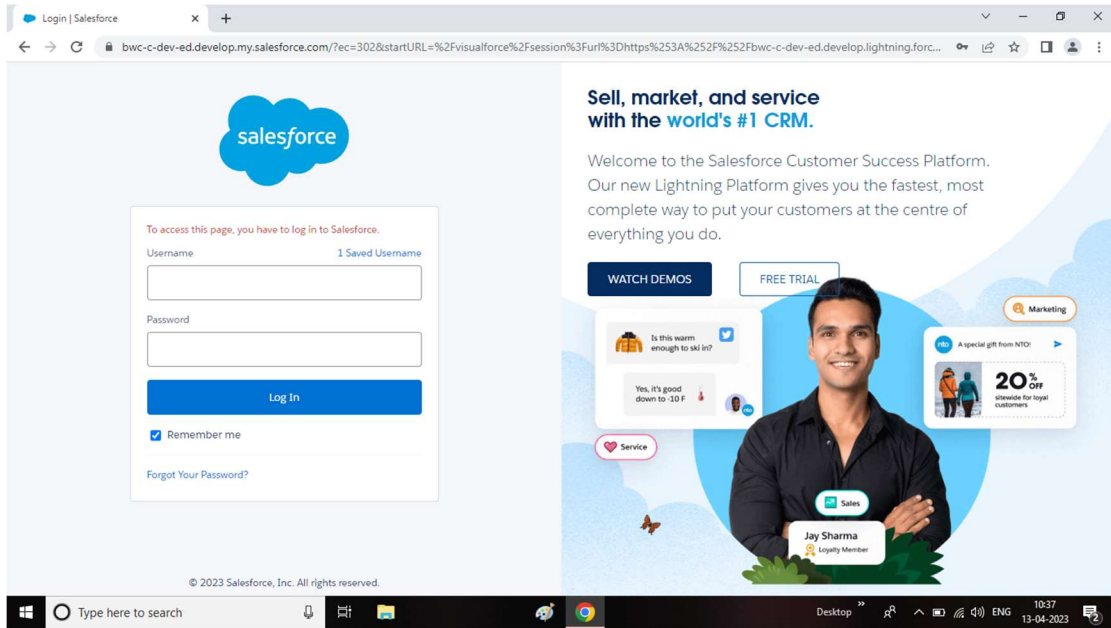
Milestone 1-Salesforce: Creation of developer org

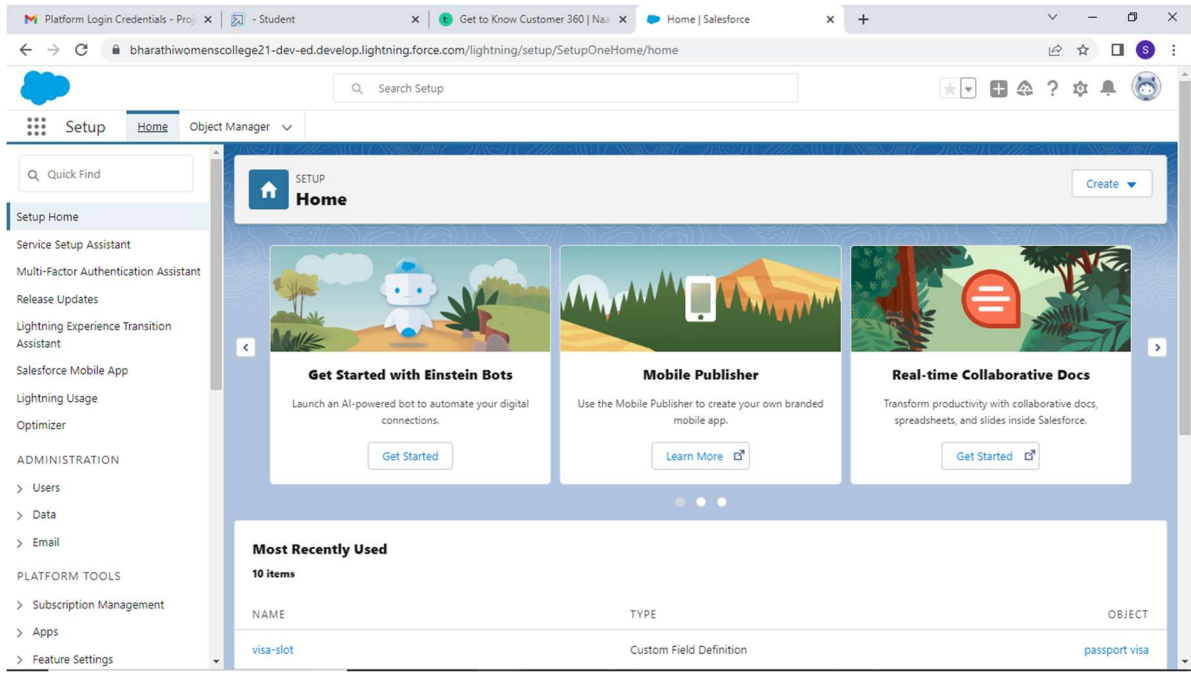
Activity-1

Creating Developer Account

Account Activation

Login to your salesforce account





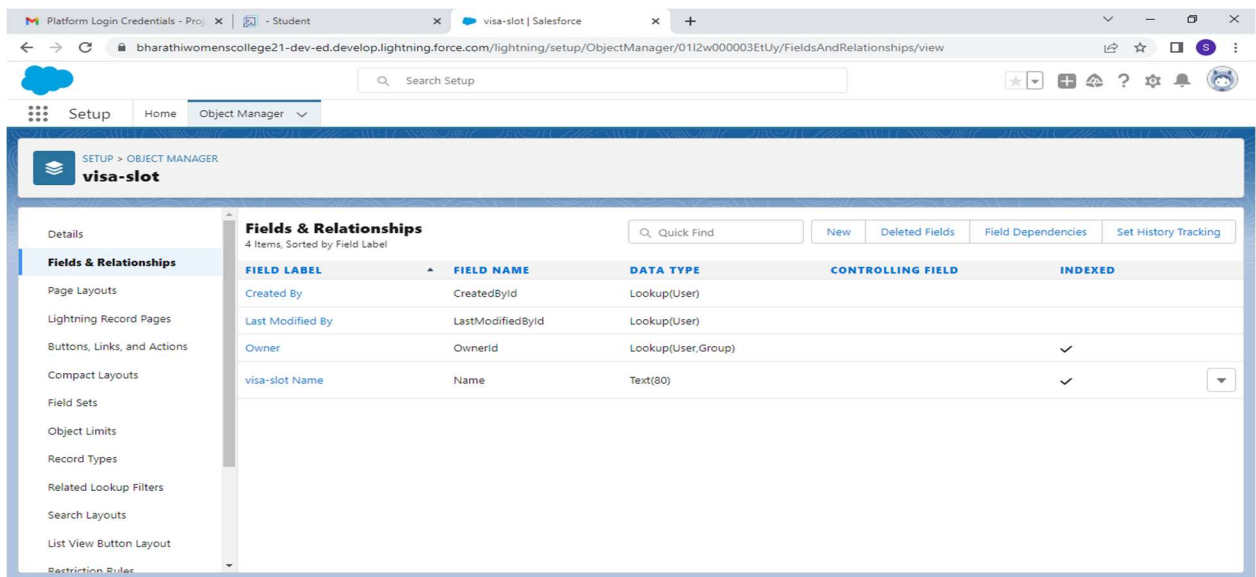
Milestone -2: Objects

Activity-1

Creation of customer object: Passport

Activity-2

Fields available on custom object: Passport



Platform Login Credentials - Proj x Student x passport visa | Salesforce x +

bharathiwomencollege21-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003Emsk/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
passport visa

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
Restriction Rules

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)		
Owner	OwnerId	Lookup(User,Group)		✓
passport visa	ZE6382052B__c	Lookup(passport visa)		✓
passport visa	ZE6382052A__c	Lookup(passport visa)		✓
visa-slot	passport_visa__c	Auto Number (External ID)		✓
visa-slot	Name	Text(80)		✓

Milestone -3

Relationship B/W Objects:

Activity-1

Creation of relationship:

Platform Login Credentials - Proj x Student x Object Manager | Salesforce x +

bharathiwomencollege21-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Setup Home Object Manager

SETUP
Object Manager
1 Items, Sorted by Label

relatio Schema Builder Create

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Asset Relationship	AssetRelationship	Standard Object			

Millstone -4 App Activity

Platform Login Credentials - Pro x - Student x App Manager | Salesforce x +

bharathiwomenscollege21-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

Setup Home Object Manager

app manager

Apps

App Manager

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

Enable App Cloning ☒ Enabled

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

	App Name ↑	Developer Name	Description	Last Modified ...	Ap...	V...
1	All Tabs	AllTabSet		13/03/2023, 12:09 pm	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	13/03/2023, 12:09 pm	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	13/03/2023, 12:09 pm	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your L...	13/03/2023, 12:12 pm	Lightning	✓
5	Community	Community	Salesforce CRM Communities	13/03/2023, 12:09 pm	Classic	✓
6	Content	Content	Salesforce CRM Content	13/03/2023, 12:09 pm	Classic	✓
7	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manag...	13/03/2023, 12:09 pm	Lightning	✓
8	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	13/03/2023, 12:09 pm	Lightning	✓
9	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	13/03/2023, 12:09 pm	Lightning	✓
10	Marketing	Marketing	Best-in-class on-demand marketing automation	13/03/2023, 12:09 pm	Classic	✓
11	Platform	Platform	The fundamental Lightning Platform	13/03/2023, 12:09 pm	Classic	
12	Queue Management	QueueManagement	Create and manage queues for your business.	13/03/2023, 12:09 pm	Lightning	✓
13	Sales	Sales	The world's most popular sales force automation (SFA) soluti...	13/03/2023, 12:09 pm	Classic	

Platform Login Credentials - Pro x - Student x visa - Lightning App Builder x +

bharathiwomenscollege21-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02u2w0000043taTAAQ&retUrl=https%3A%2F%2Fbharathiwomens...

Lightning App Builder App Settings Pages visa Help

App Settings

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 1

visa

* Developer Name 1

visaBWC2023

Description 1

Enter a description...

App Branding

Image 1

Primary Color Hex Value 1

#0070D2

Org Theme Options

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

App Launcher Preview

visa

Milestone-5 User:

Activity-1: Creation of User

The screenshot shows the Salesforce Setup interface for managing users. The left sidebar contains a search bar and a navigation menu with categories like Users, Feature Settings, and User Interface. The main content area is titled 'All Users' and includes a table of existing users.

Users Management Settings

- Users
- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings

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 View](#)

[New User](#) | [Reset Password\(s\)](#) | [Add Multiple Users](#)

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty00d2v00000rkm79eax.kfnn8ffcoct@chatter.salesforce.com		✓	Chatter Free User
Edit	sureka_SUREKA	Ssure	sureka@company.sandbox		✓	System Administrator
Edit	sureka_SUREKA	Ssure	sureka19052002@gmail.com		✓	Cross Org Data Proxy User
Edit	User Integration	integ	integration@00d2v00000rkm79eax.com		✓	Analytics Cloud Integration User
Edit	User Security	sec	insightsecurity@00d2v00000rkm79eax.com		✓	Analytics Cloud Security User

[New User](#) | [Reset Password\(s\)](#) | [Add Multiple Users](#)

Activity-2:

The screenshot shows the Salesforce Setup interface for sharing settings. The left sidebar contains a search bar and a navigation menu with categories like Security and Sharing Settings. The main content area is titled 'Sharing Settings' and includes a table of organization-wide defaults.

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: **All Objects**

[Disable External Sharing Model](#)

Default Sharing Settings

Organization-Wide Defaults | [Edit](#) | [Organization-Wide Defaults Help](#)

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

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'report' and a list of navigation items: Feature Settings, Analytics, Reports & Dashboards (highlighted), Access Policies, Historical Trending, Report Types (highlighted), Reporting Snapshots, and Reports and Dashboards Settings. The main content area is titled 'Report Types' and shows the 'Custom Report Type Definition' for 'passport with visa locations'. The definition table includes fields for Report Type Label, Report Type Name, Report Type Category, Deployment Status, Description, Created By, and Modified By. Below the table is the 'Object Relationships' section, which shows a Venn diagram with two overlapping circles labeled 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)'.

Setup

Search Setup

Report Types

Custom Report Type

passport with visa locations

Below is the information for this custom report type. You can click the buttons on this page to preview or update information for the custom report type.

Custom Report Type Definition

Report Type Label	Report Type Name	Report Type Category	Deployment Status
passport with visa locations	passports_with_visa_slots_with_payments	Campaigns	Deployed
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	

Object Relationships

Flow Interview Logs (A)

... with at least one related record from Flow Interview Log Entries (B)

Milestone-7 Dashboards:

The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'dashb' and a list of navigation items: Feature Settings, Analytics, Reports & Dashboards (highlighted), Access Policies, Historical Trending, Report Types, Reporting Snapshots, and Reports and Dashboards Settings (highlighted). The main content area is titled 'Reports and Dashboards Settings' and shows the 'User Interface' settings. The settings include checkboxes for 'Enable Floating Report Headers (Salesforce Classic only)', 'Enable Dashboard Finder', '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', 'Chatter Options', and 'Unified Analytics Home'.

Setup

Search Setup

Reports and Dashboards Settings

Modify the behavior of the user interface for report and dashboard pages using the following settings:

User Interface

- ☒ Enable Floating Report Headers (Salesforce Classic only)
- ☒ Enable Dashboard Finder
- ☐ 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

Unified Analytics Home

- ☒ Show preview thumbnails for reports and lightning dashboards
- ☐ Enable the Unified Experience for Analytics Home

4.Trailhead Profile Public URL

SUREKA K	https://traiblazer.me/id/sureka2023visa
RANJANI <u>S</u>	https://traiblazer.me/id/cranjanisP
RENUKA R. S	https://traiblazer.me/id/ssrrenuka
SANDHIYA R	https://traiblazer.me/id/rrsandhiya
SOWMIYA K	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, Loyalty , profitability, and customer retention at the salesforce CRM

Application That Helps to Book Visa Slot in the lifecycles.

8.FUTURE SCOPE:

- It might be used by a government agency or a visa processing centre to schedule and manage appointments with applicants.
- It is helps when you going to work like.

Thank you!...