



PROJECT REPORT TEMPLATE

CRM APPLICATION THAT HELPS TO BOOK A VISA SLOT

1. INTRODUCTION

1.1 OVERVIEW

A Visa slot management project is a system that used to track and manage the availability of visa slot, which are appoints that are required for certain visa applications. It might be used by a government agency or a visa processing centre to schedule and manage appointment with applications.

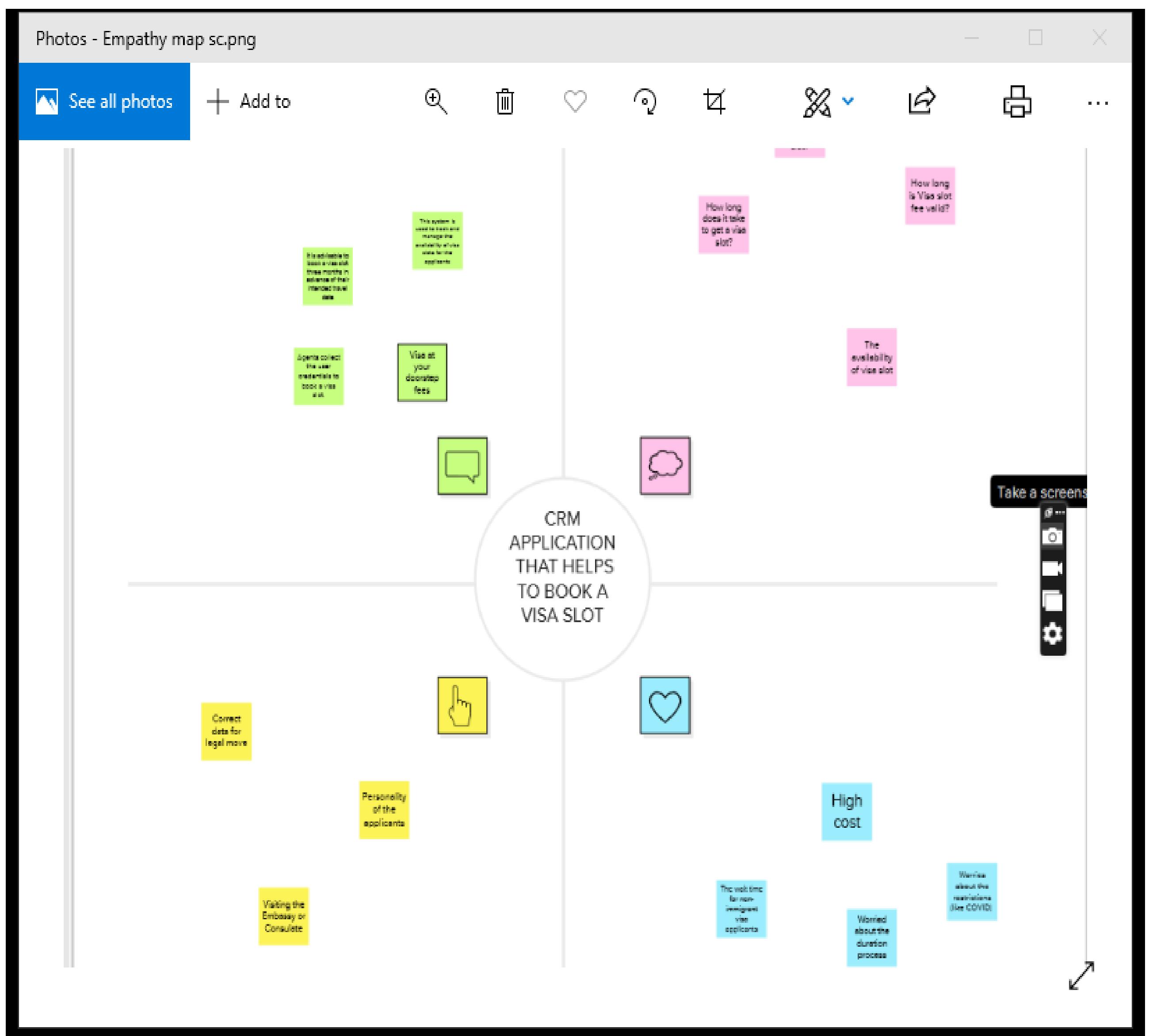
1.2 PURPOSE

Saving the time of the customers who want to book if by using CRM application of booking a visa slot. Wandering for booking the visa slot and tracking can be reduce here. Reduce the paper filling as much the customers expecting. Ensuring the safety of the customer and parts of many verification.

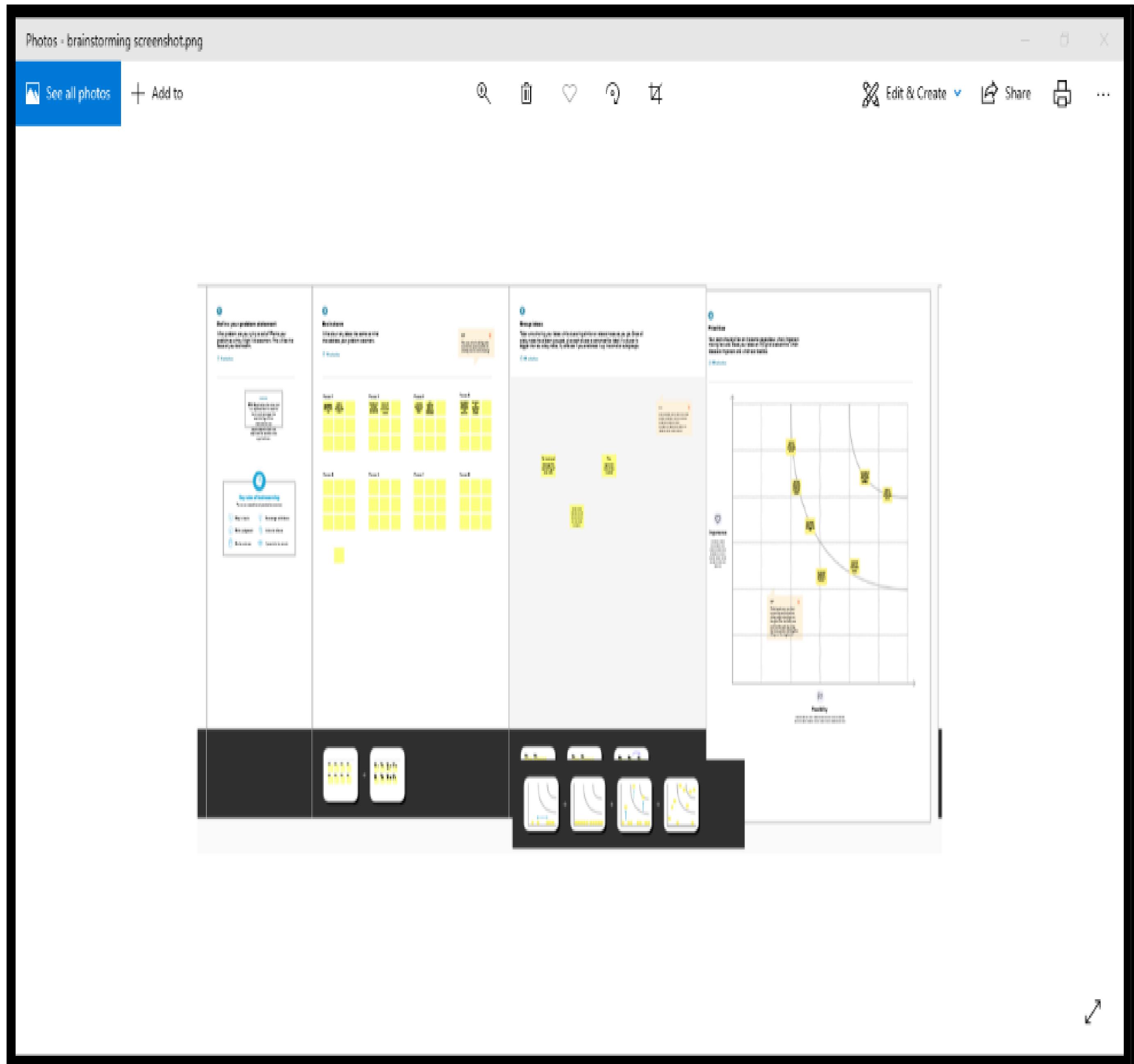
2. PROBLEM DEFINITION AND DESIGN THINKING

Reduce the paper costing and fulfil the customer expectation. Ensuring the safety of the customers and parties of many verification.

2.1 EMPATHY MAP



2.2 IDEATION & BRAINSTORMING MAP



3 RESULT

3.1 Data Model

Objects	Passport	Visa slot	Payment	Reschedule/cancel
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Field and data type	Full name/Number	Location/Text	Payment mode/Text	Passport Number(master)/Text
Field and data type	Passport Number/Number	Time/Number	Card Number/Text	Location/Text
Field and data type	Contact Number/Text	Passport Number(master)/Text	Transaction id (Auto Number)/Number	Time/Number
Field and data type	Permanent address/Text	Visa slot Number/Number	Cancel Transaction/Text	Cancel/Text
Field and data type			Visa slot Number(master)/Text	Status/Text

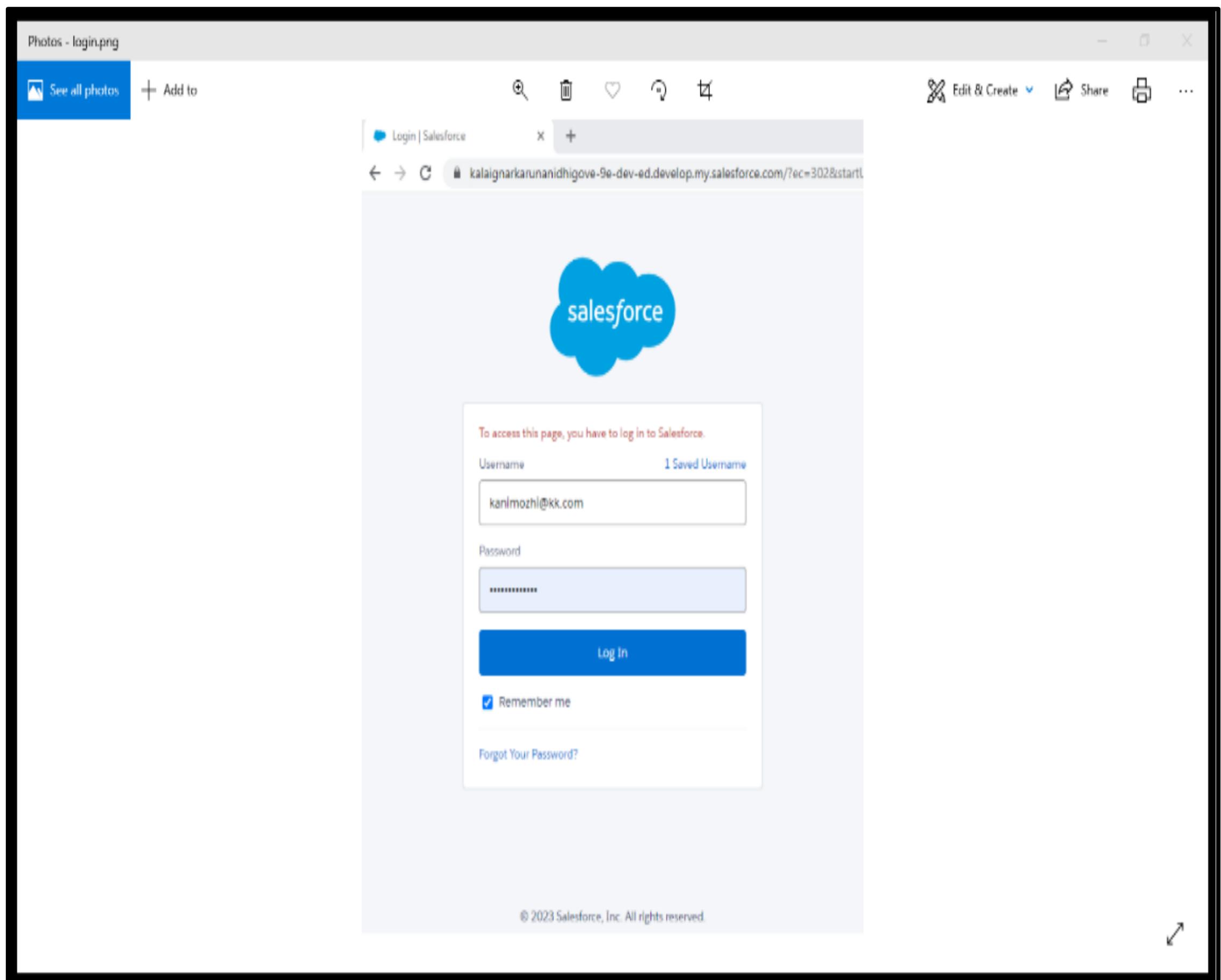
3.2 ACTIVITY AND SCREENSHOTS

1. Creation of salesforce platform

Go to Developer, salesforce.com and click on sign up.

Enter our details as Name, Email, Role, Company etc. email is send to your mail id.

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



2. Creation of custom object: PASSPORT

Navigate to setup to select the object manager. At the top of the right side there you can find create custom object.

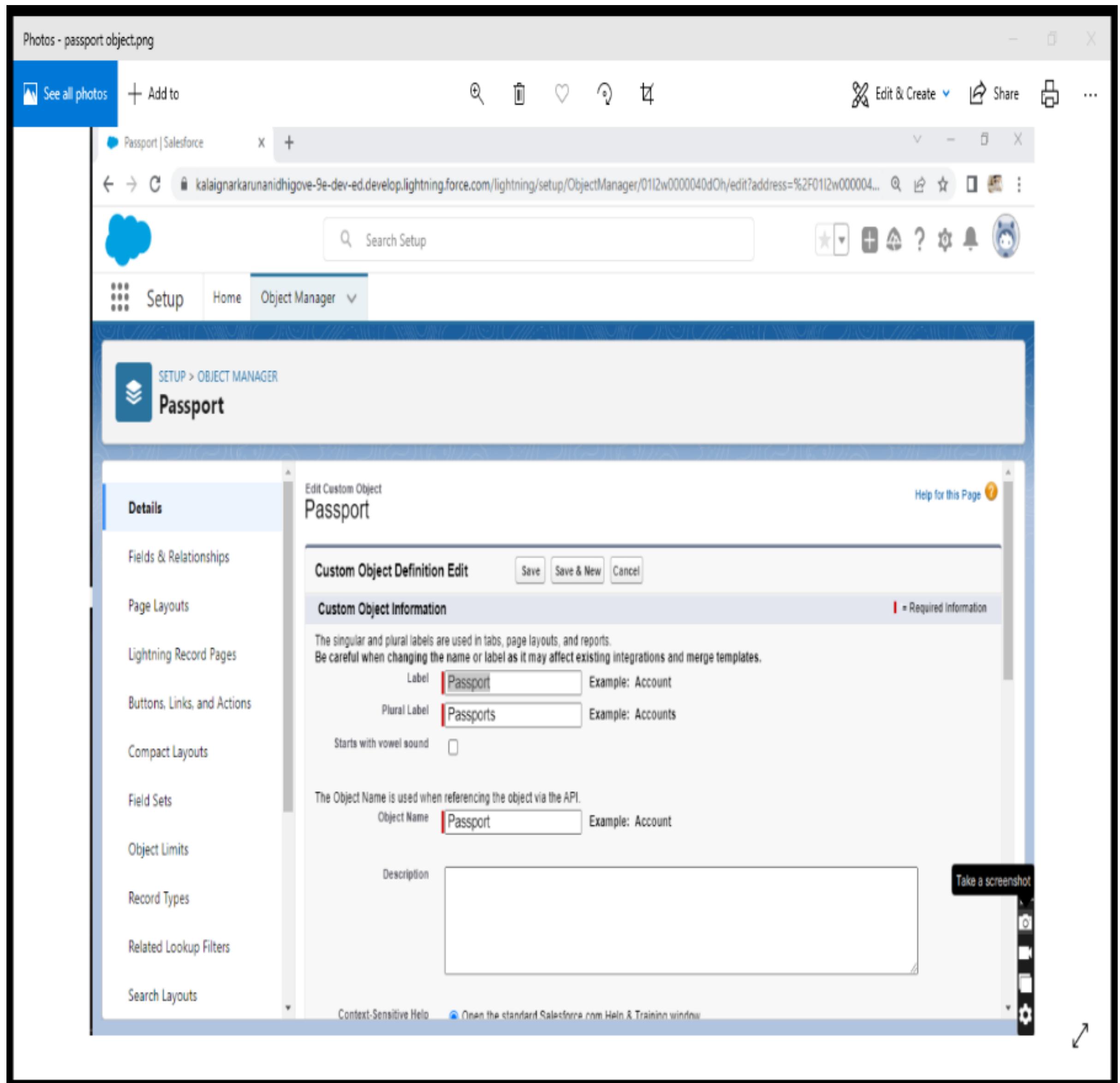
You will navigate to custom object definition edit where you have to give the object name.

The label name has Passport and Plural label has Passports. In enter record name label and format enter name

record name has passport number and the data type has text. In deployed status select deployed option.

Ensure that you have to select at least one option in the object creation option; it is available only once when a custom object is created.

Then click on next you will navigate to the new custom object tab you have to select tab style and click on next.



Custom Object: VISA SLOT

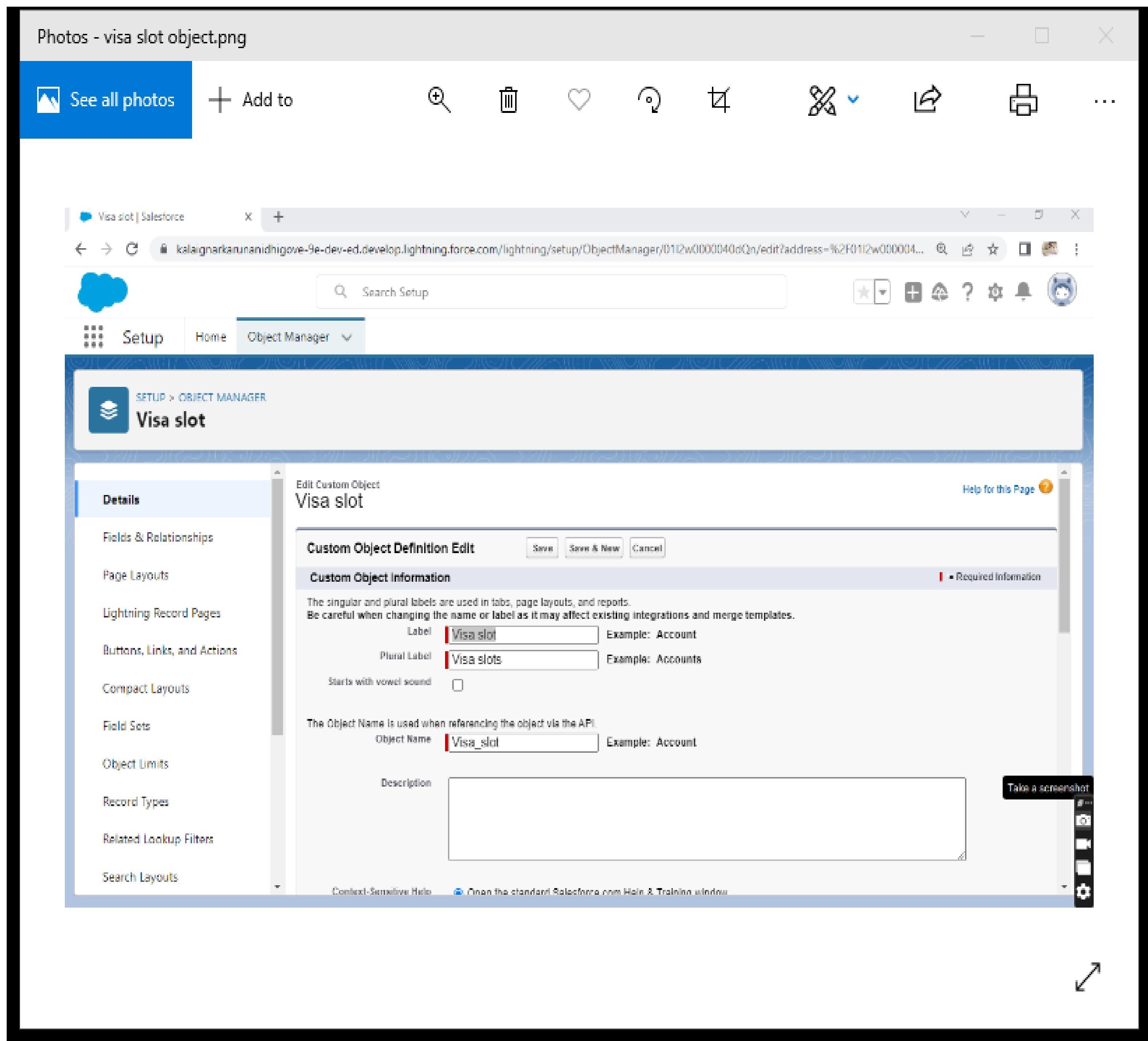
Navigate to setup and select object manager. At the top of the right side there you can find create custom object.

You will navigate to custom object definition edit where you have to give the object name.

The label name has Visa slot and Plural label has Visa slots. In enter record name label and format enter name record name and the data type has text. In deployment status select deployed option.

Ensure that you have to select at least one option in the object creation option; it is available only once when a custom object is created.

Then click on next you will navigate to the new custom object tab where you have to select tab style and click on next and save it.



Custom Object: PAYMENT

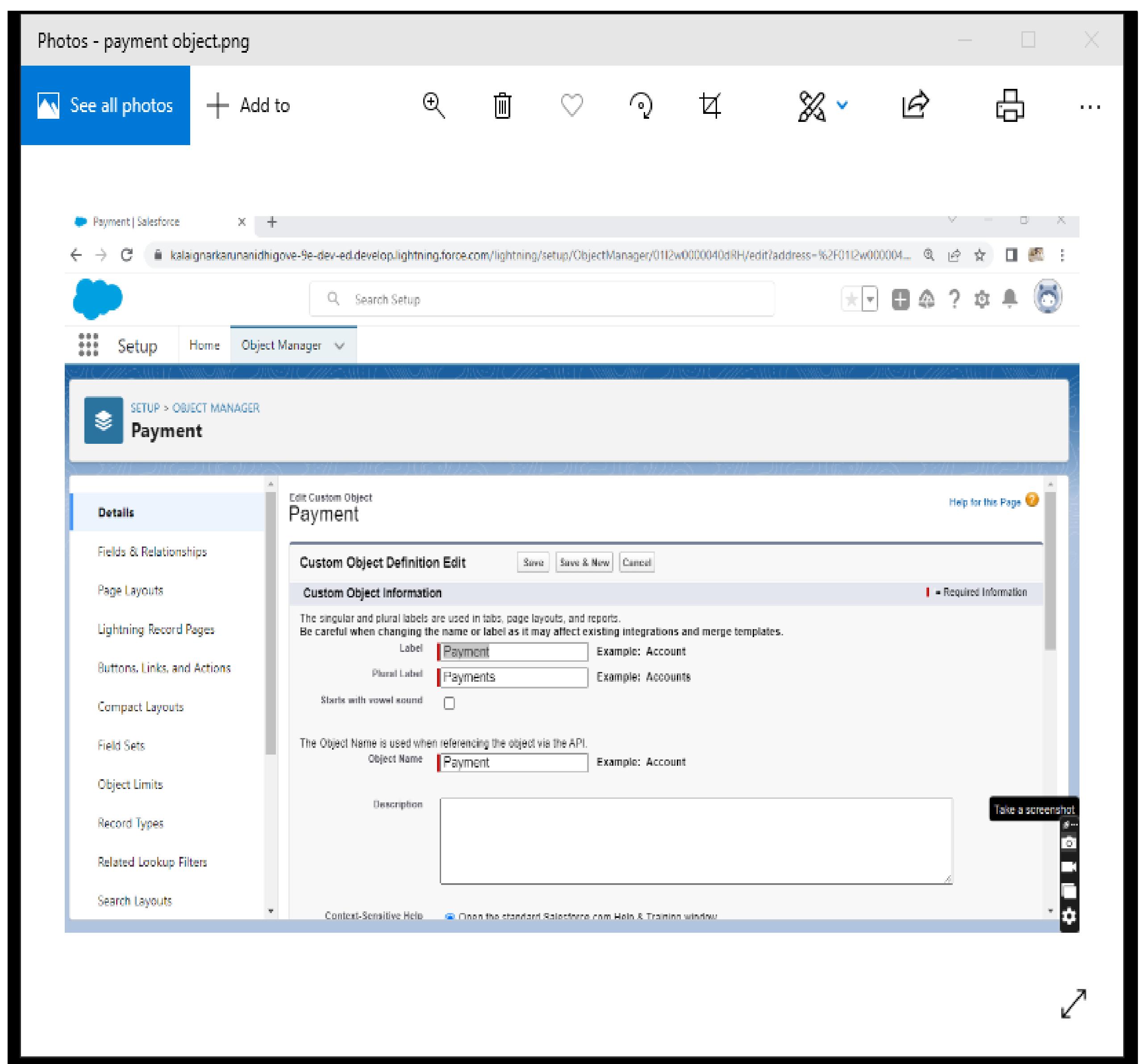
Navigate to setup and select object manager. At the top of the right side there you can find create custom object.

You will navigate to custom object definition edit where you have to give the object name.

The label name has Payment and Plural label has Payments. In enter record name label and format enter name record and the data type has text.

In deployment status select deployed option. Ensure that you have to select at least one option in the object creation option, it is available only once when a custom object is created.

Then click on next you will navigate to the new custom object tab where you have to select tab style and click on next.



Custom Object: RESCHEDULE

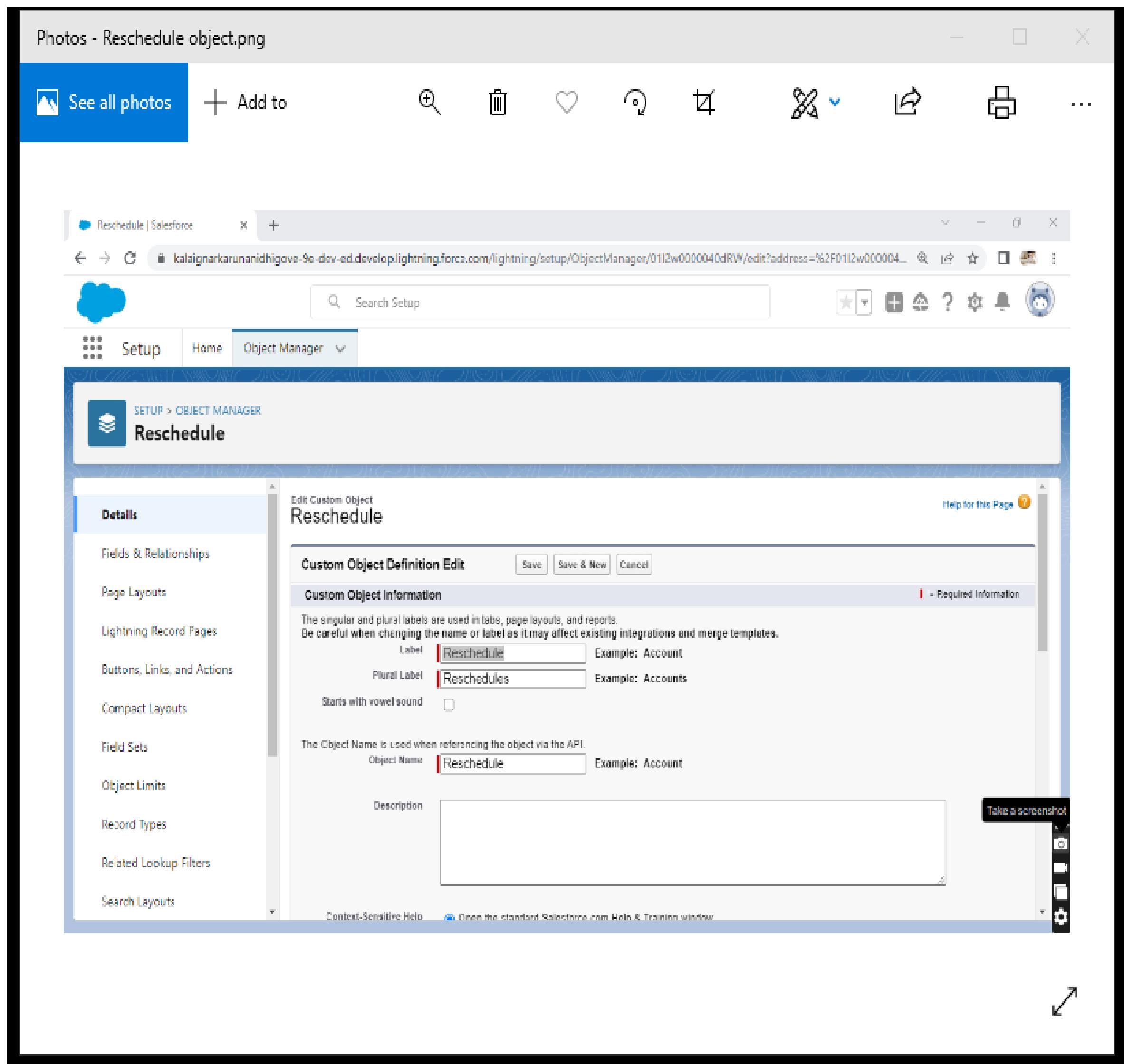
Navigate to setup and select object manager. At the top of the right side there you can find create custom object.

You will navigate to custom object definition edit where you have to give the_object name.

The label name has Reschedule and Plural label has Reschedules. In enter record name label and format enter name record name and the data type has text.

In deployment status select deployed option. Ensure that you have to select at least one option in the object creation option; it is available only once when a custom object is created.

Then click on next you will navigate to the new custom object tab where you have to select tab style and click on next.



3. CREATION OF TABS

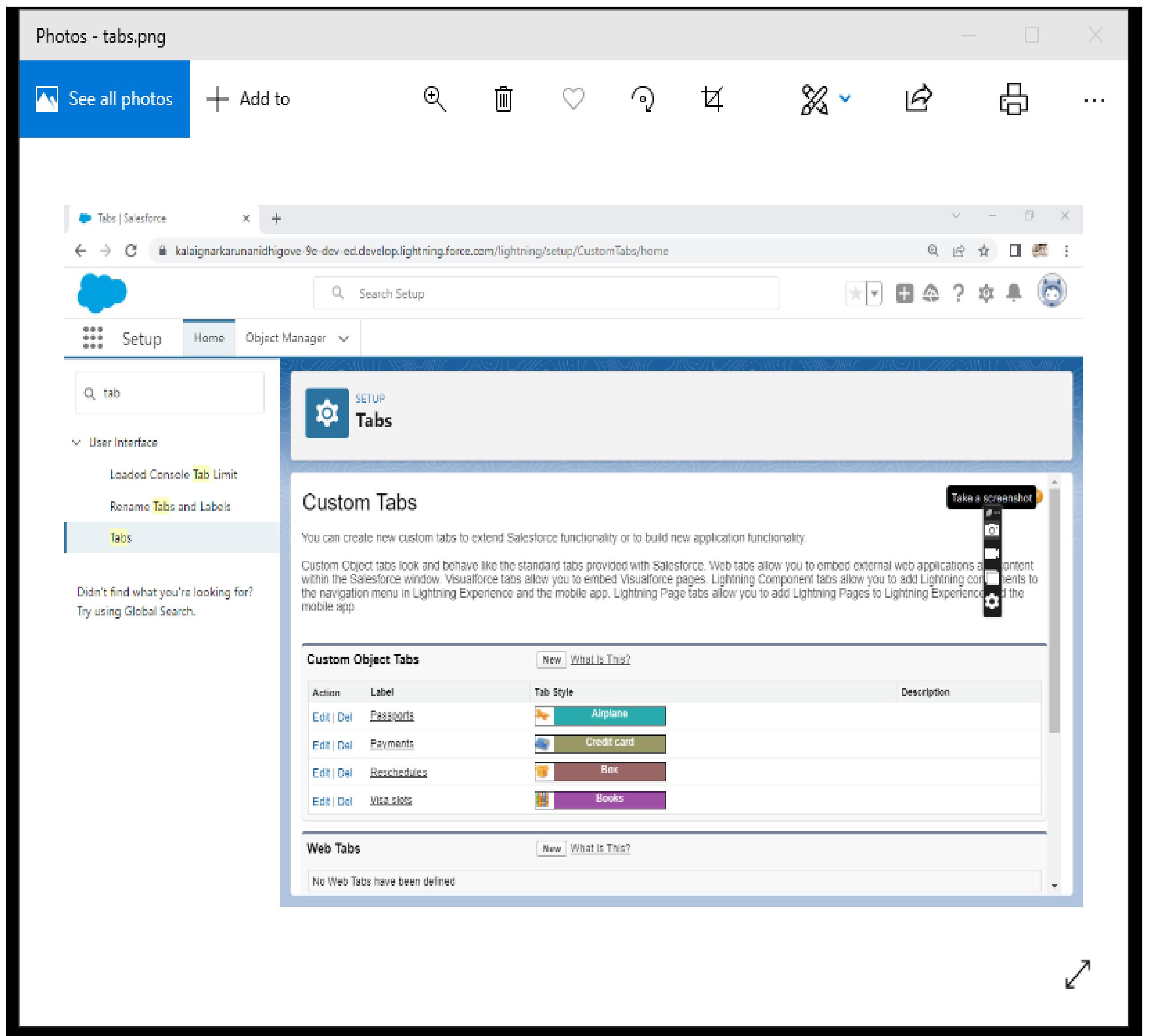
Once you created the object then click on next you will navigate to the new custom object tab where you have to select tab style and click on next.

After the tab selection you will be navigated to add to profiles select default on click on next. Thereafter you have to

select a custom app select include tab so that object will be available in all objects and select save option.

You have to create tabs for every object that you are created in the custom object. We have created the custom tab for the custom object Passport we had given the airplane tab style for Passport.

And for Visa slot we have selected the Books tab style. For Payment object we have selected the Credit card tab style. And for reschedule we have selected the box tab style. The screenshot is attached below.



Action	Label	Tab Style	Description
Edit Del	Passports	Airplane	
Edit Del	Payments	Credit card	
Edit Del	Reschedules	Box	
Edit Del	Visa slots	Books	

Web Tabs

No Web Tabs have been defined

4. Create of field on custom object

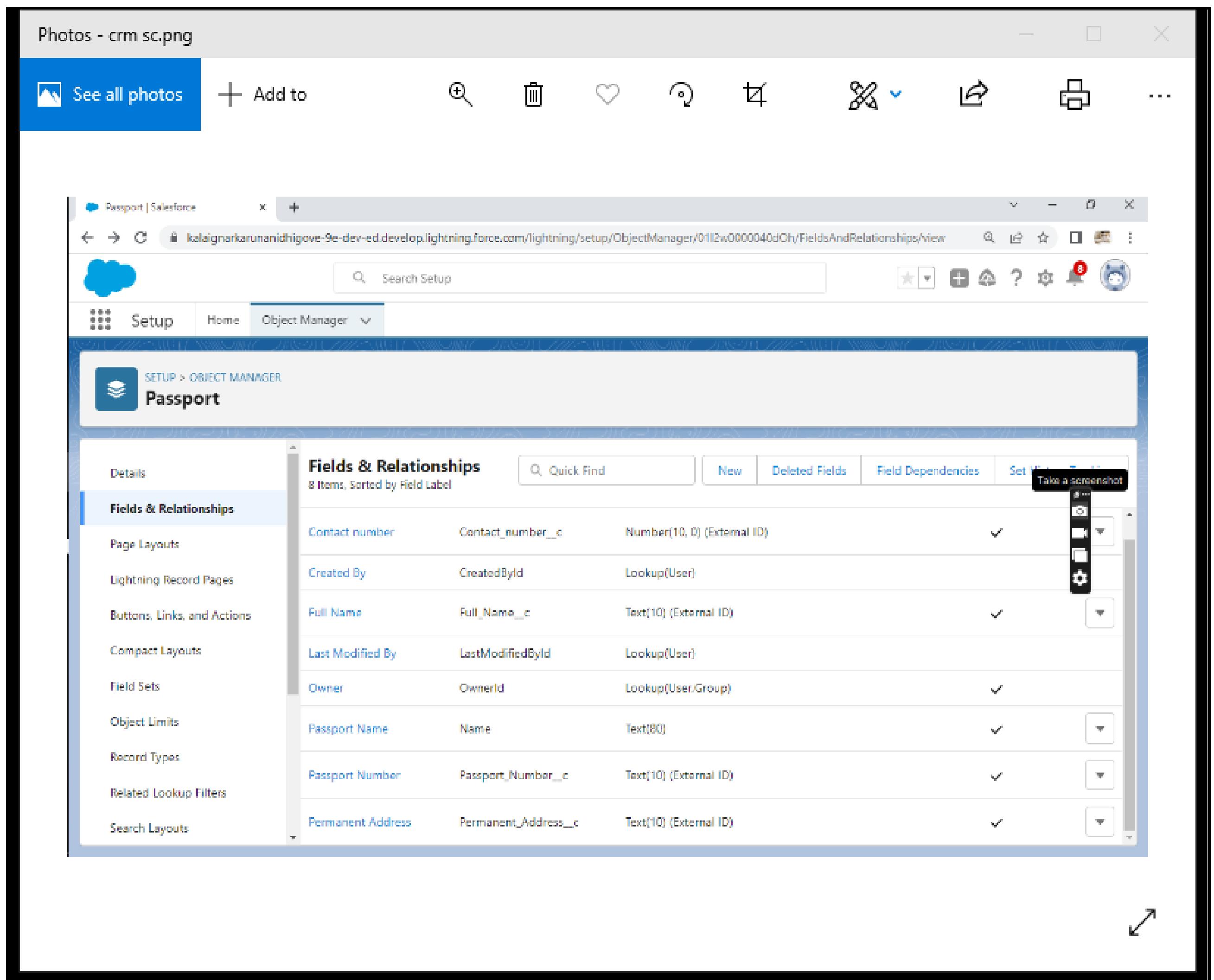
PASSPORT

Select your object from the selection has passport. At the top right side you can find a new select that option. Now you have to select data type, select number has data type.

Select our data type as number go to the next page enter the field label has contact number and length should be 10.

In passport object you have to create the following fields: Full name, Passport number, Contact number, Permanent address and 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.

Go to next page on visible checkbox so that it is visible to all profile and select option and save it. The passport fields are created like this type.



Create of field on custom object: VISA SLOT

Select our object from the selection has Visa slot. At the top right side you can find a new select that option. Now you have to select data type, select number has data type.

And you will navigate to enter the details page where you give the field label. select option fields and relationships. Select our data type as number go to the next page enter the field label has Passport number (Master), Visa slot number.

In Visa slot object you have to create the following fields:

Location, Time, Passport number (Master), Visa slot number and 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.

Go to next page on visible checkbox so that it is visible to all profile and select option and save it. The Visa slot fields are created like this type.

The screenshot shows the Salesforce Object Manager interface for the 'Visa slot' object. The left sidebar lists various setup categories. The main area displays the 'Fields & Relationships' section, which contains 8 items sorted by Field Label. The table shows the following fields:

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) (External ID)		✓
Passport	Passport_c	Master-Detail(Passport)		✓
Passport Number (Master)	Passport_Number_Master_c	Number(10, 0) (External ID)		✓
Time	Time_c	Text(10) (External ID)		✓
Visa slot Name	Name	Text(80)		✓

Create of filed on custom object: PAYMENT

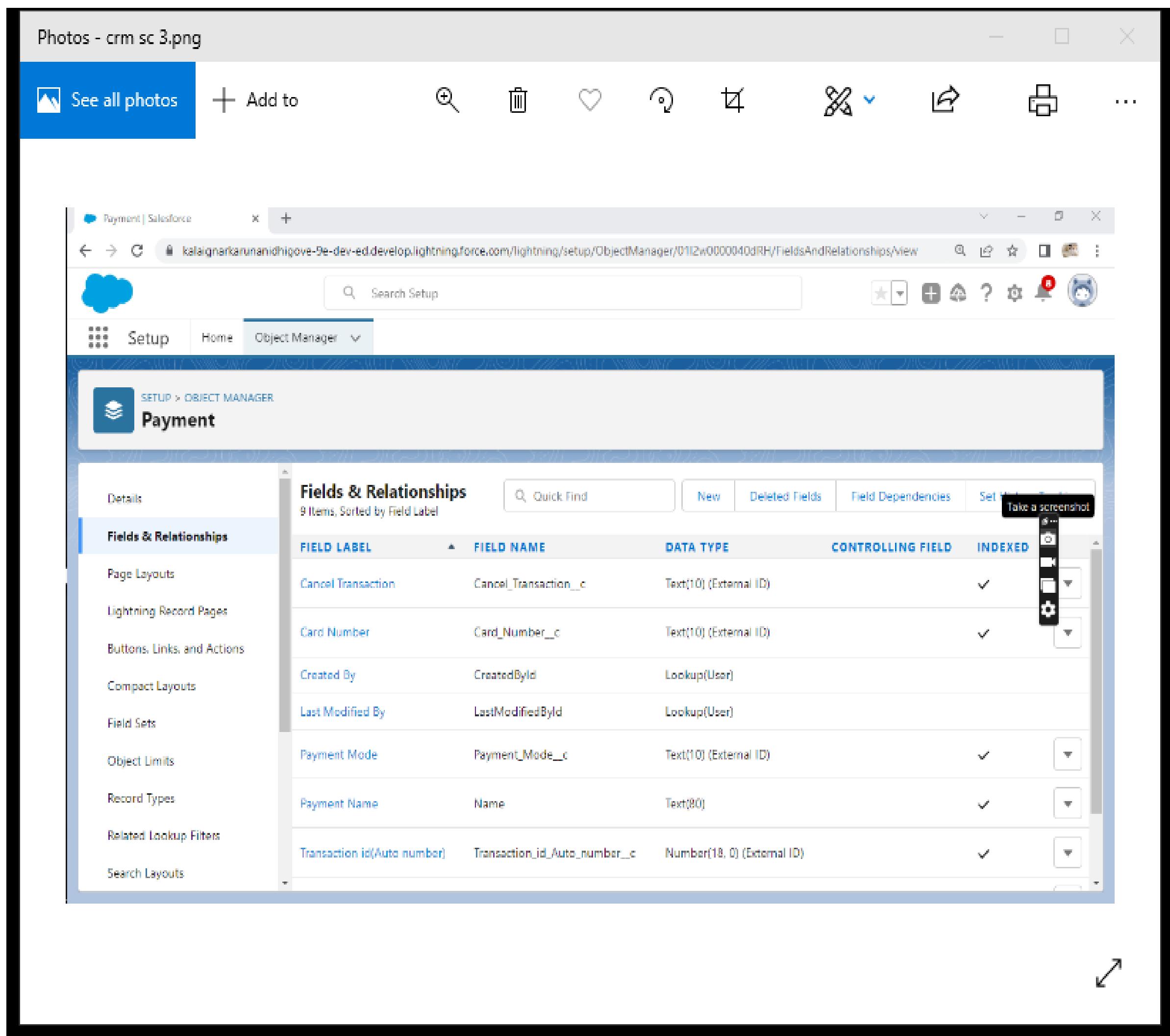
Select our object from the selection has Payment At the top right side you can find a new select that option. Now you have to select data type, select number has data type.

Go to the next page enter the field label has contact number and length should be 10.

Select the option fields and relationships. Select our data type as number go to the next page enter the field label has card number, Transaction id (Auto number).

In Payment object you have to create the following fields: Payment Mode, Card number, Transaction id, Cancel transaction, visa slot number and 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.

Go to next page on visible checkbox so that it is visible to all profile and select option and save it. The Payment fields are created like this type.

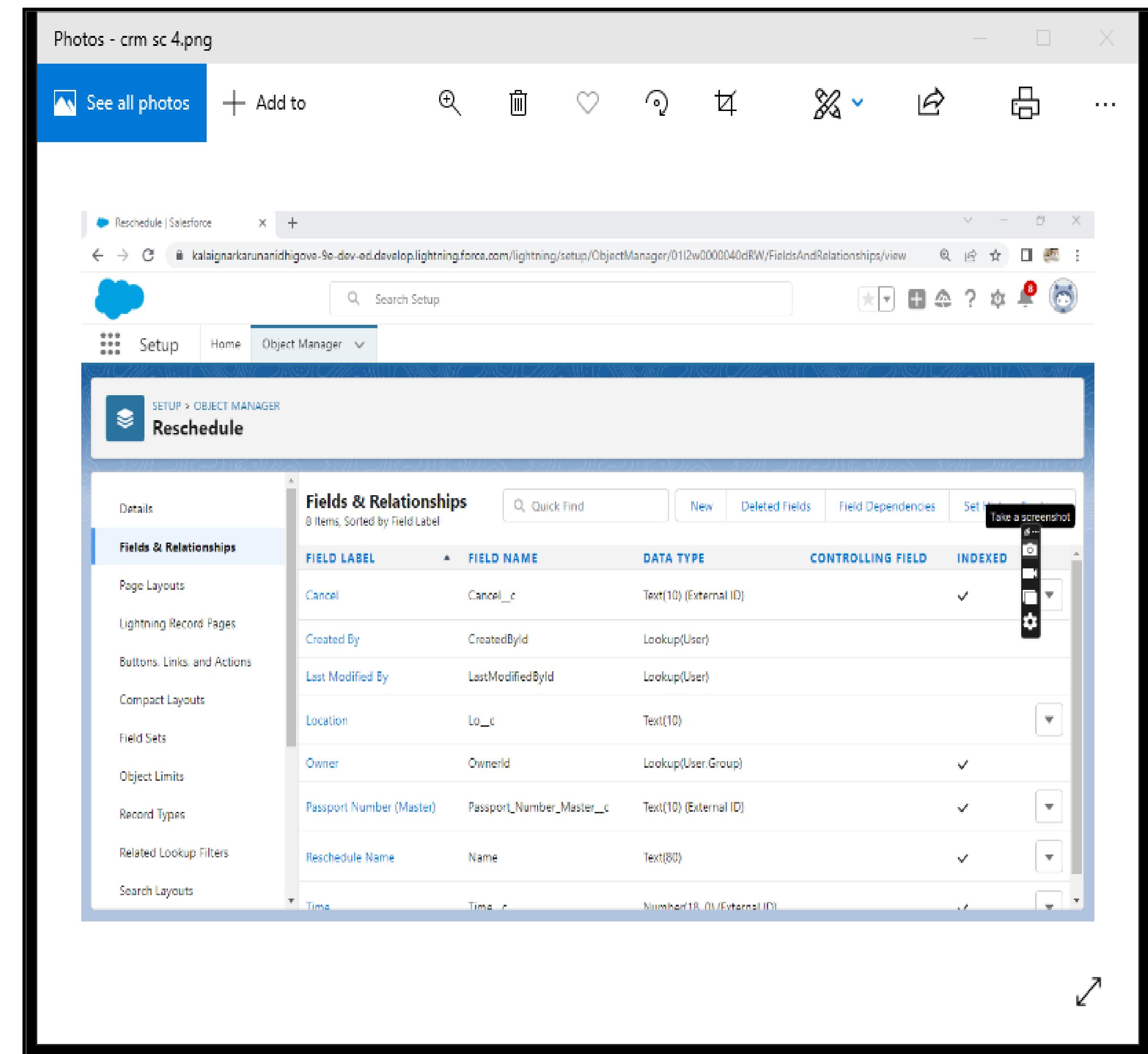


Create on field on custom object: RESCHEDULE

Select our object from the selection has Reschedule and select option fields and relationships. Select our data type as number go to the next page enter the field label has Passport number (Master).

In Reschedule object you have to create the following fields: Passport number (Master), Location, Time, Cancel, Status and 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.

Go to next page on visible checkbox so that it is visible to all profile and select option and save it. The Reschedule fields are created like this type.



FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Cancel	Cancel_c	Text(10) (External ID)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Location	Lo_c	Text(10)		
Owner	OwnerId	Lookup(User/Group)		✓
Passport Number (Master)	Passport_Number_Master_c	Text(10) (External ID)		✓
Reschedule Name	Name	Text(80)		✓
Time	Time_c	Number(10, 0) (External ID)		

4. Creation of Relationship: Relation between the objects

Relationship in salesforce is a 2-way association between 2 objects. Using relationship we can link objects with each

other and we can make connections and display data about other related objects.

There are two types of relationships:

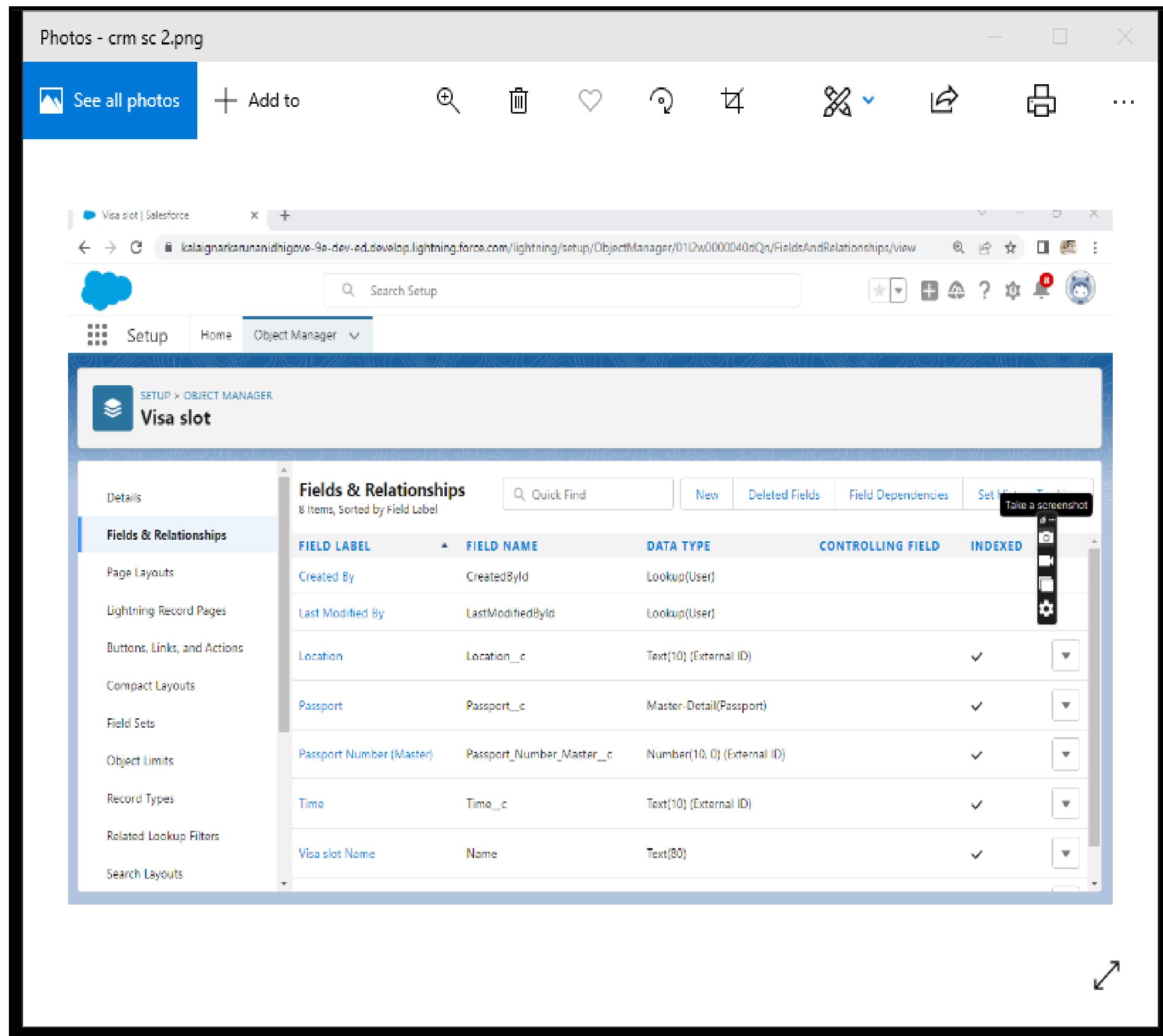
- 1) Master detail relationship: A master detail relationship defines the relationship between the parent and child. The master table defines the parent relation and the detail defines the child relation. If the master table is deleted then the child record data is also deleted.
- 2) Look up relationship: Lookup Relationship in salesforce links two objects together but has no effect on deletion or security.
- 3) Many to many relationship: Records of a particular object can connect with various records of different objects and vice versa.

To create a Master Detail relationship between passport and visa. Go to the setup option from the Home page and click on it. Select the object manager and select visa slot object form the list and select the fields and relationships and click on new.

Select the data type has Master detail relationship and select related to the object has passport, amd click on next.

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. Select visible for all problem in field level security and

select page layout in next page and save it. To create the relationship between the payment and visa slot in this type.



5. Creation of 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.

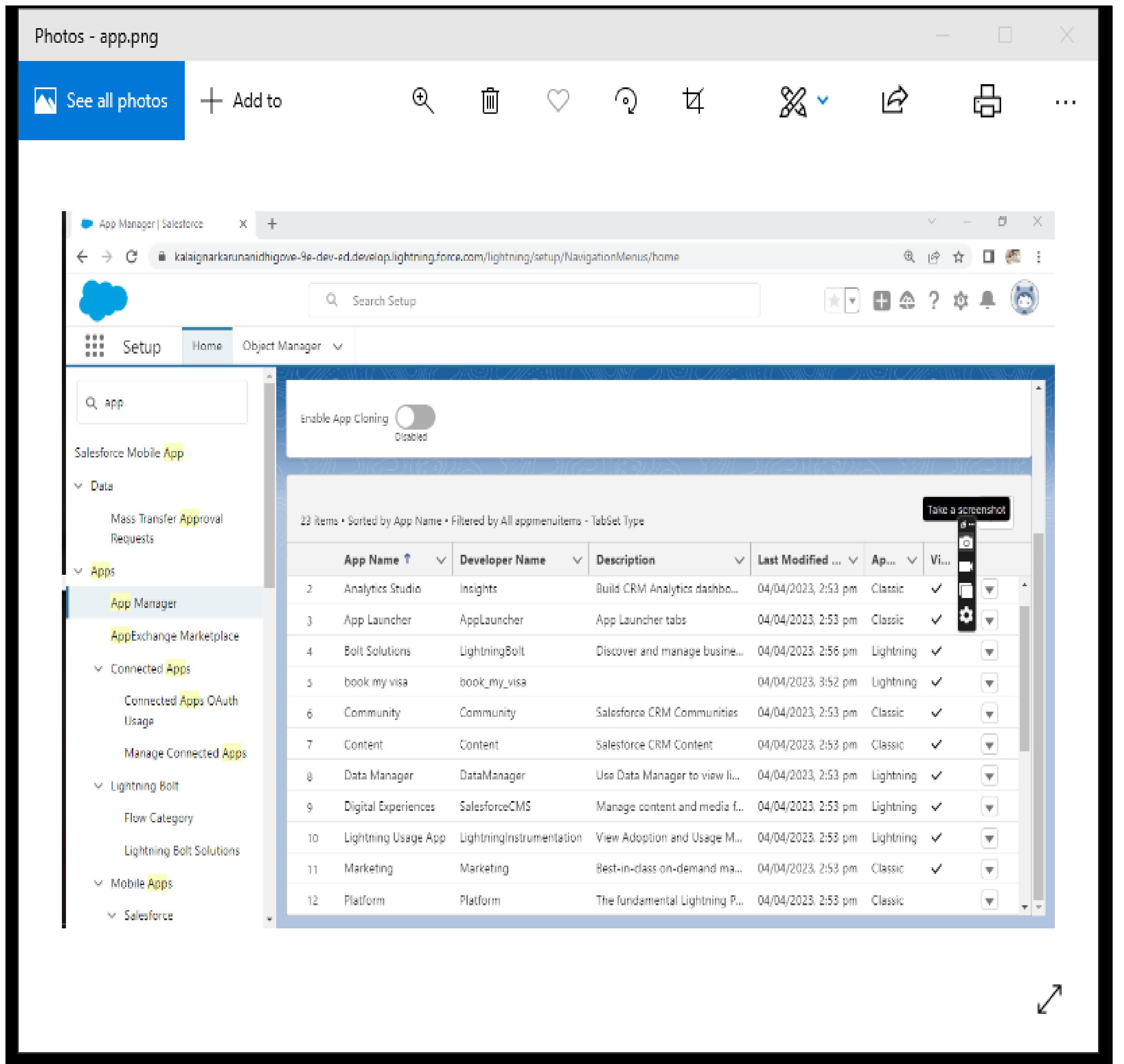
There are two types of Salesforce Applications:

- 1) Standard App
- 2) Custom App

Navigate to the setup and search for app manager. To select the new lighting app option and give the app name has book my visa and upload the picture. Click next.

Choose the app option as navigation style standard navigation, support from factors desktop and mobile and select next. And move the objects from available items to selected items.

Passport, visa slots, Payments, reschedule/cancel to selected items. And system the admin profile to available items to selected items and save it.

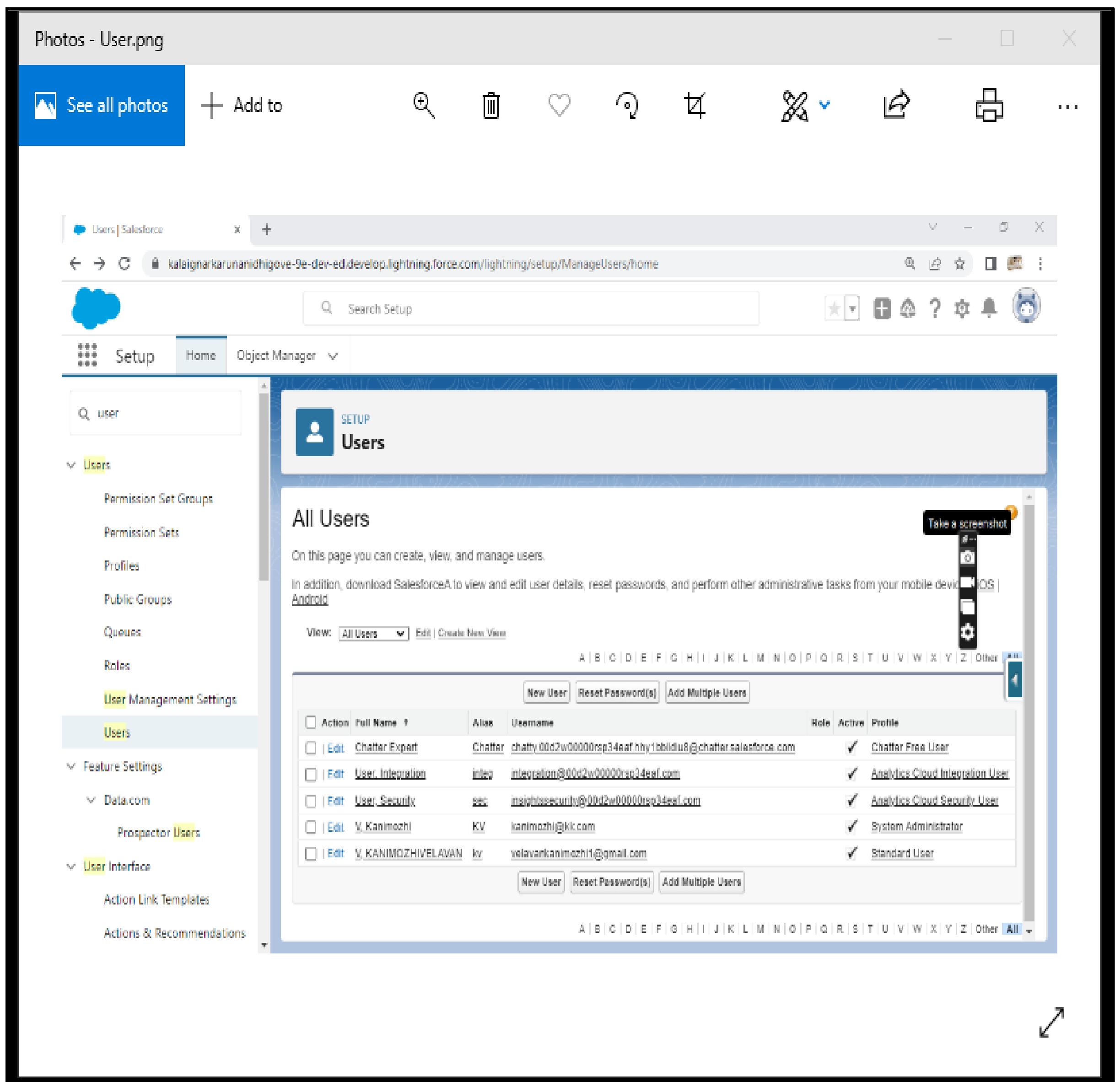


6. Creation of user

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

Navigate to setup in quick find search bar, search in user and select it. Give the first name and last name. Enter your email and Enter your username: it must be unique.

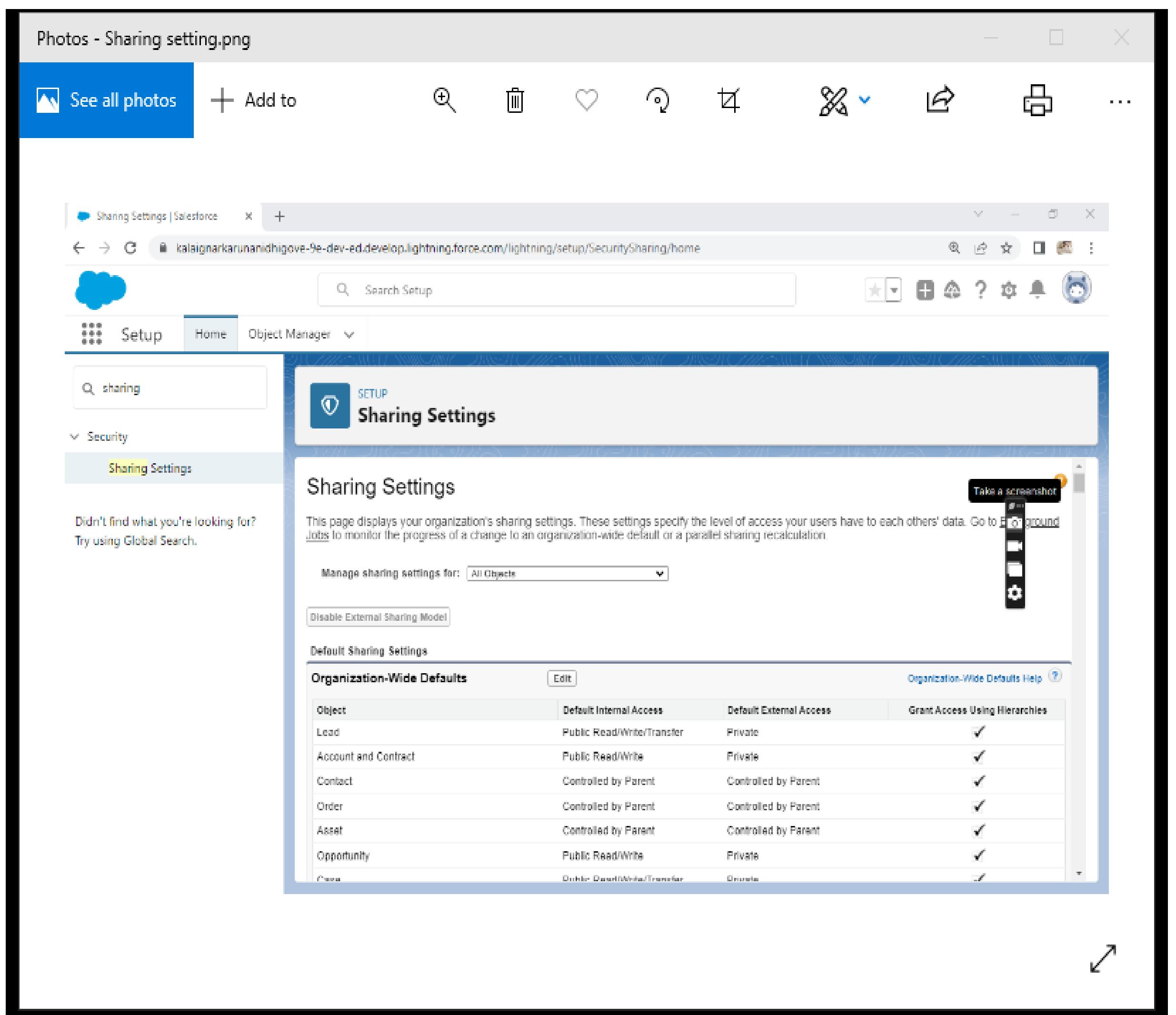
Select your user licence of salesforce. In the profile field select standard user. At the bottom of the page check the box to generate a new password and save the page.



OWD: Organisation wide default settings

This can be used to give permission to the organization wide and it can be used to restrict the access, we can control the record level access.

Go to the setup to find out the sharing setting select it. Edit the organisation wide default and select the passport object and change the default external access to public/Read/Write.

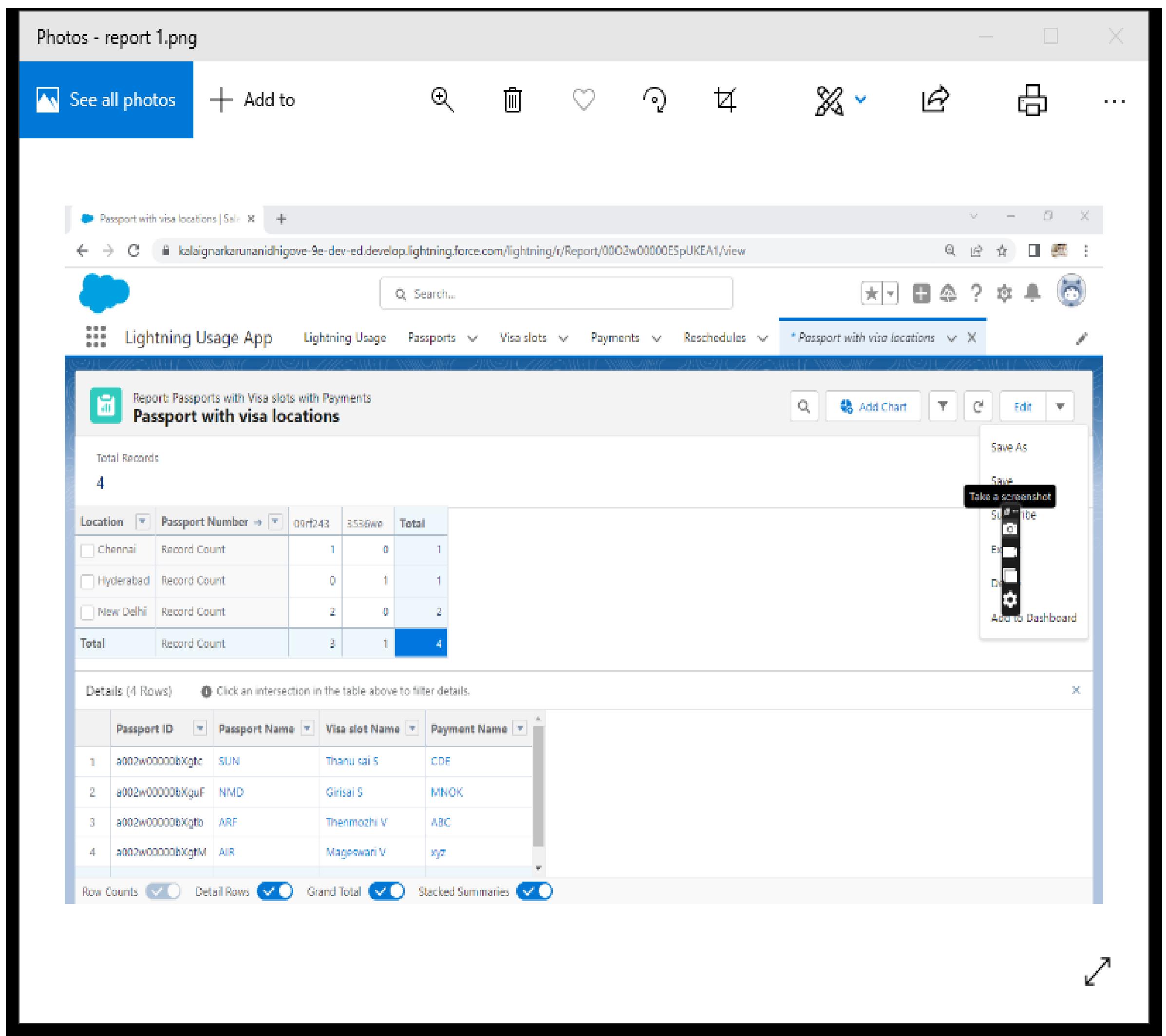


7. Create a Report

A report is a list of records that meet the criteria you define. It's displayed in Salesforce in rows and columns, and can be filtered, grouped or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden or shared and can be set to read-only or read/write.

Click the app launcher and search for Book a visa. Select the report and click new report select the report type and passport with visa slot with payment and select start report. Left side of the report you can find the outline pane. In the group row location and group column select passport: passport number to display and add the column select has visa slot.

Edit the filters as show me the select all passport and passport created date select all time finally save and run it. Go to the edit option export select excel sheet format and click export. We can see the detail as shown below.

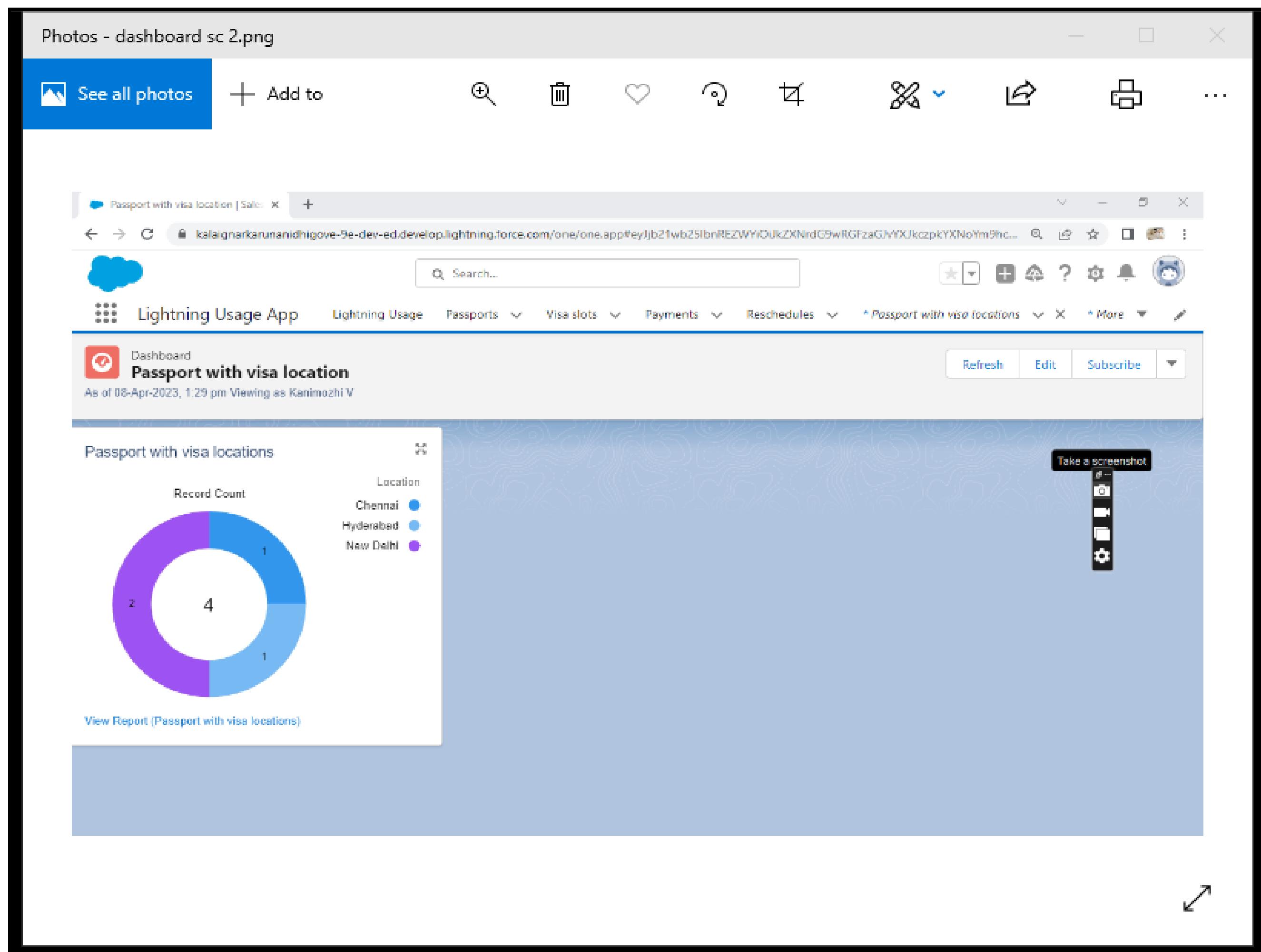


8. Create a dashboard

Dashboards in Salesforce are a graphical representation of Reports. It shows data from source reports as visual components.

Go to the app launcher and search for book a visa. Select the dashboard and click new dashboard. Click add component and report passport with locations.

Select the donut chart as selection. Ensure the value is record donut and sliced by locations. Click add and save the dashboard.



4. TRAILHEAD PROFILE PUBLIC URL;

TEAM LEADER: K. Kanimozhi

<https://trailblazer.me/id/kkannan59>

TEAM MEMBER 1: V. Kanimozhi

<https://trailblazer.me/id/kvelavan>

TEAM MEMBER 2: S. Poongothai

<https://trailblazer.me/id/poongothai55>

TEAM MEMBER 3: S. Priyadharshini

<https://trailblazer.me/id/psenthilkumar8>

5. ADVANTAGES

Processing is fast.

Saving time.

Not much paper work.

DISADVANTAGES

Internet connection problem is there.

Poor connection leads to trouble and anxiety.

Lack of leadership.

Burdensome data entry.

6. APPLICATIONS

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

CRM is a well conceived business strategy with long terms outcomes that maximize profitability, revenue and customer satisfaction by organising around customer segment, fostering

customer satisfying actions and implementing customer centric process.

CRM is a strategy employed to learn and understand customer need wants ad behaviour in order to develop stronger and sustained relationship with them.

7. CONCLUSION

By using the CRM application, we should track and manage the availability of visa slots easily. Booking of visa slots will be in an easier way.

It is a beneficial and useful one for the customers. Save the time and often visiting trouble is not there.

8. FUTURE SCOPE

This will allow businesses to interact with customers via email, phone, social media, and other channels.

Companies will be able to pivot to meet the changing needs and trends driven by customer expectations.

