

A CRM APPLICATION THAT HELPS TO BOOK VISA SLOT

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INTRODUCTION

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, 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.

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 center to schedule and manage appointments with applicants. Customer Relationship Management Software is used by business to manage interaction with current and future customers. Today's CRMs have evolved into a confluence of multiple functions but the primary objective of a CRM is to serve the customers better, increase retention, and manage the sales pipeline.

EMPATHY MAP

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File Edit View Window Help

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Tools Fill & Sign Comment

Template

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.

[Share template feedback](#)

Build empathy

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

Says

What have we heard them say?
What can we imagine them saying?

Green box: I don't understand

Green box: I'm confused

Yellow box: The food is delicious

Yellow box: I love the service

Thinks

What are their needs, wants, hopes, and dreams? What other thoughts might influence their behavior?

Pink box: I want to be a part of this

Pink box: I want to be a part of this

Pink box: I want to be a part of this

Pink box: I want to be a part of this

Does

What behavior have we observed?
What can we imagine them doing?

Blue box: I want to be a part of this

Blue box: I want to be a part of this

Blue box: I want to be a part of this

Blue box: I want to be a part of this

Feels

What are their fears, frustrations, and emotions? What other feelings might influence their behavior?

Blue box: I want to be a part of this

Blue box: I want to be a part of this

Blue box: I want to be a part of this

Blue box: I want to be a part of this

Sign In

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10-04-2023

IDEATION & BRAINSTROMING MAP

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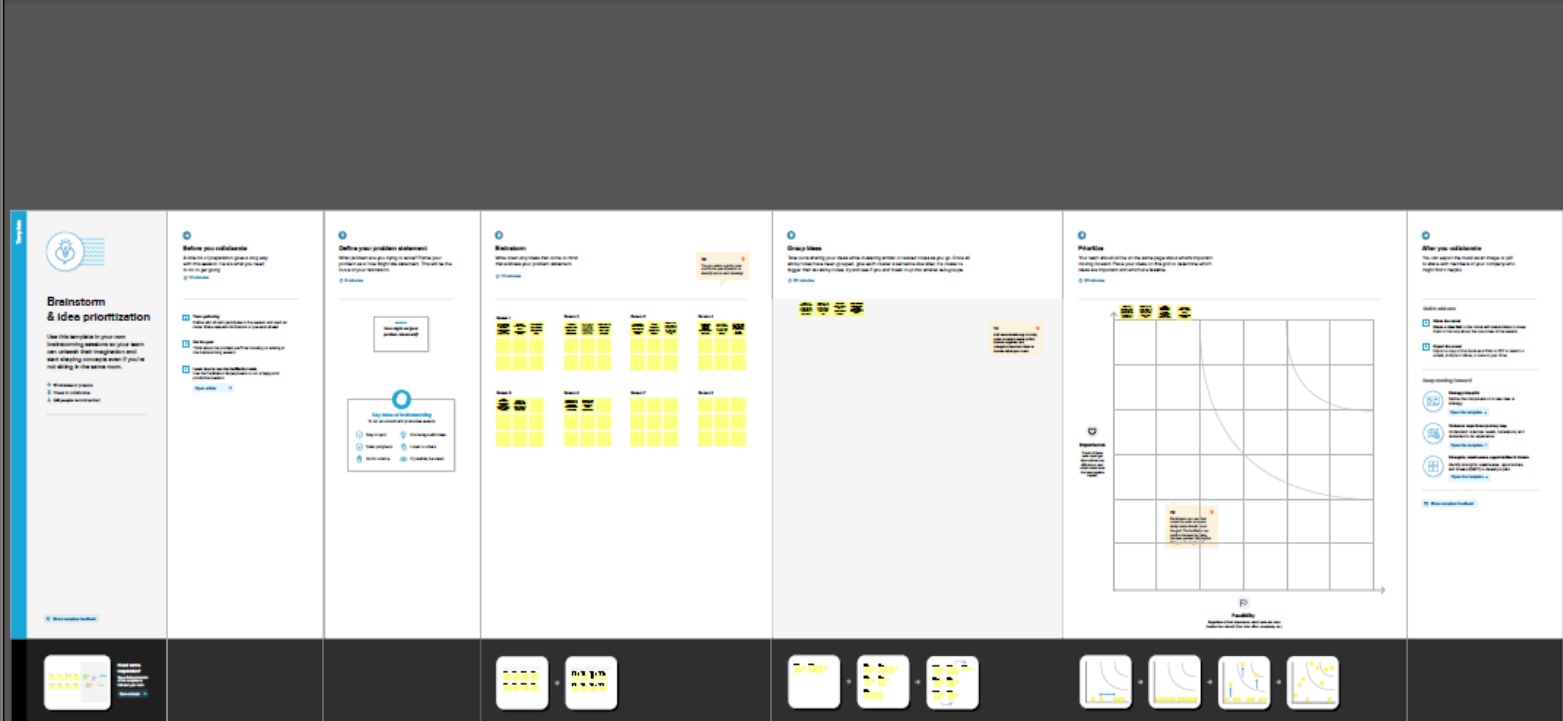
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Brainstorm & Idea Prioritization

Before your ideation

Define your problem statement

Brainstorm

Group ideas

Prioritize

After your ideation

10:37 10-04-2023

Creating Developer Account

Creating a developer org in salesforce.

- ❖ Go to developers.salesforce.com/
- ❖ Click on sign up.
- ❖ On the sign up form, enter the following details :
 1. First name & Last name
 2. Email
 3. Role : Developer
 4. Company : College Name
 5. County : India
 6. Postal Code : pin code
 7. Username : should be a combination of your name and company
- ❖ This need not be an actual email id, you can give anything in the format : [username@organization.com](#)

salesforce developer login - Google


google.com/search?q=salesforce+developer+login&oq=sales&aqs=chrome..69i59j2j69i57j69i59j46i131i199i433i465i512j69i60l3.7184j0j4&sourceid=chrome&ie=UTF-8

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Salesforce Customer Secure Login Page. Login to your Salesforce Customer Account.

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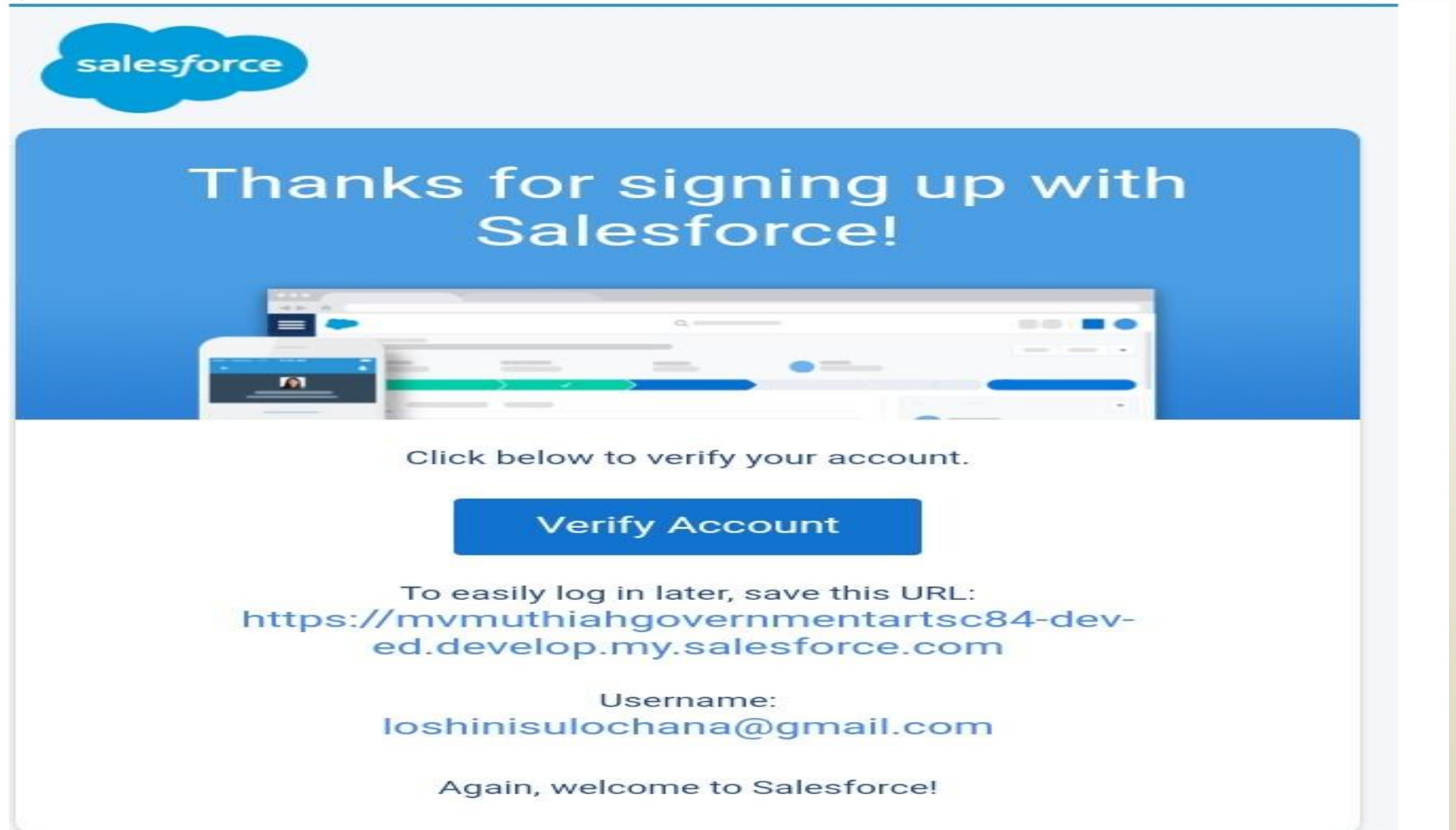
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Address

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Account Activation

- Go to the inbox of the email that you used while signing up.
- Click on the verify account to activate your account.
- The email may take 5-10mins, as

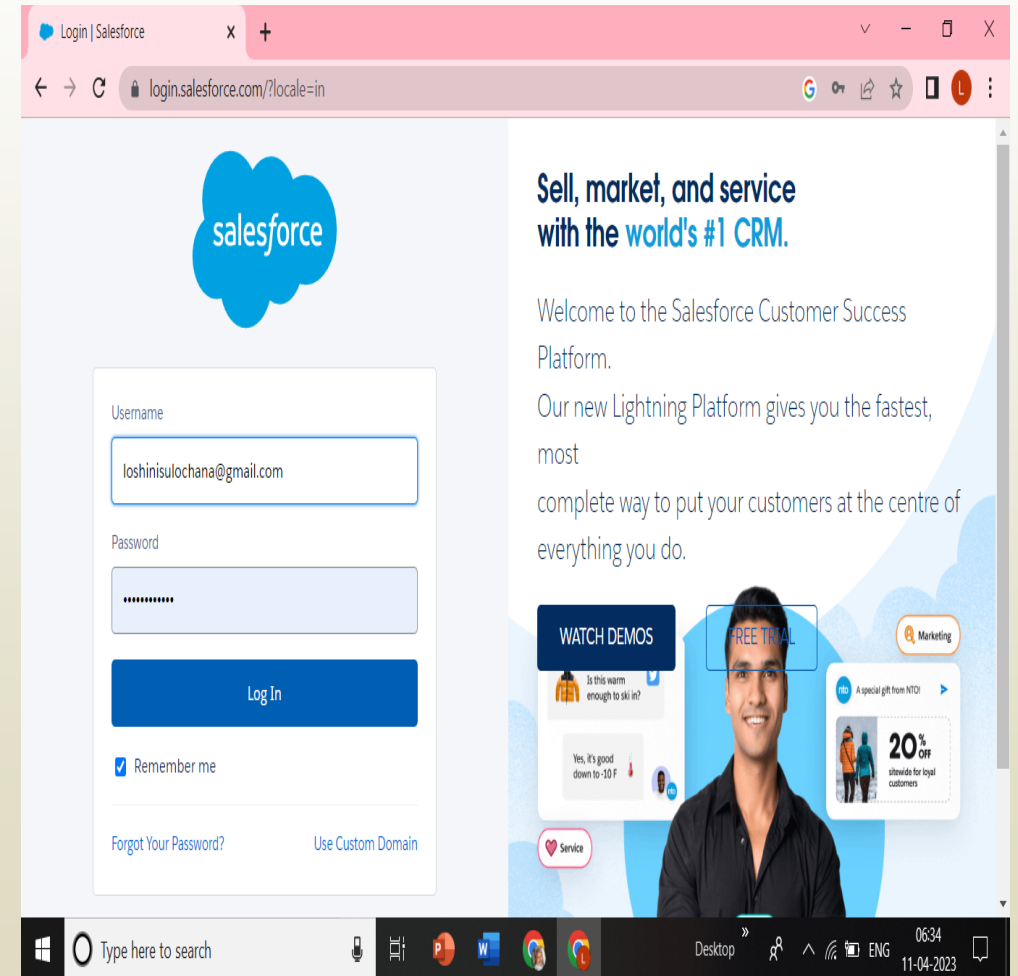
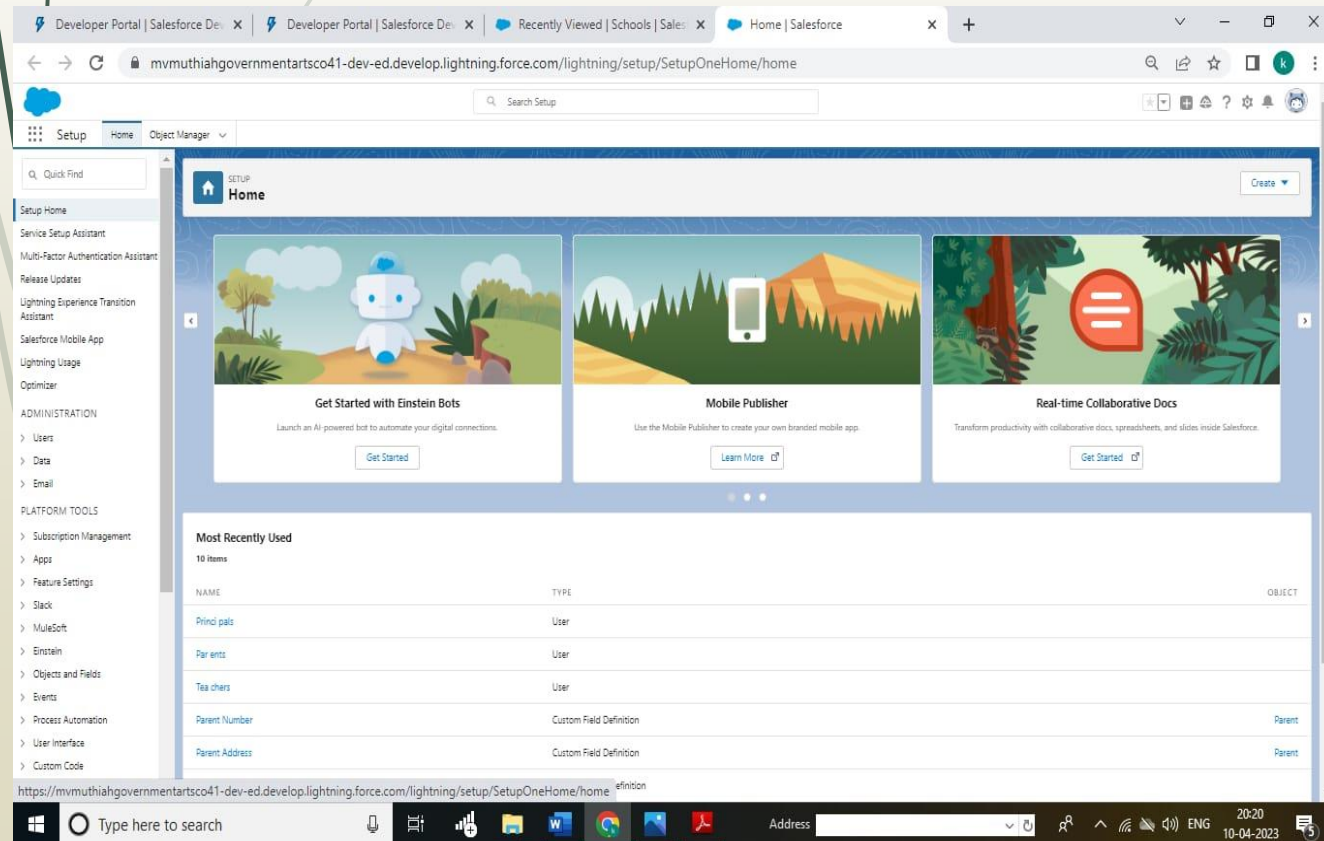


Login To Your Salesforce Account

- ✓ Go to salesforce.com and click on login.
- ✓ Enter the username and password that you just created
- ✓ After login this is the home page which you will see.

Salesforce Login

<https://login.salesforce.com>



Objects:

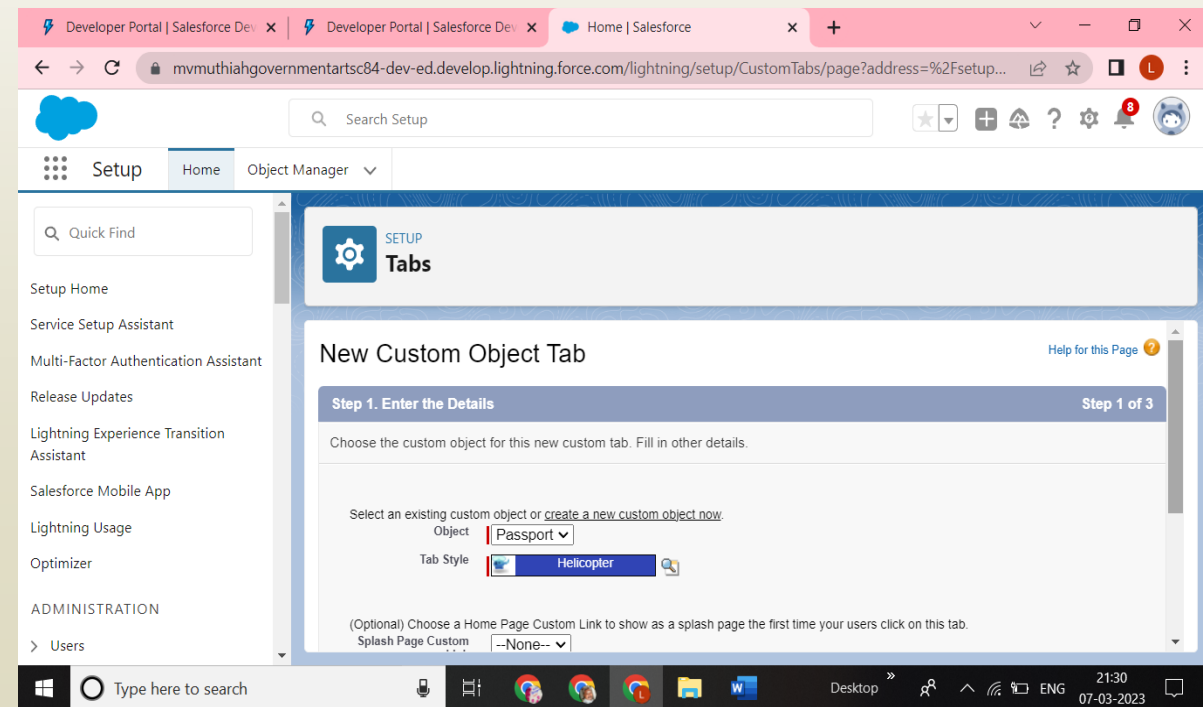
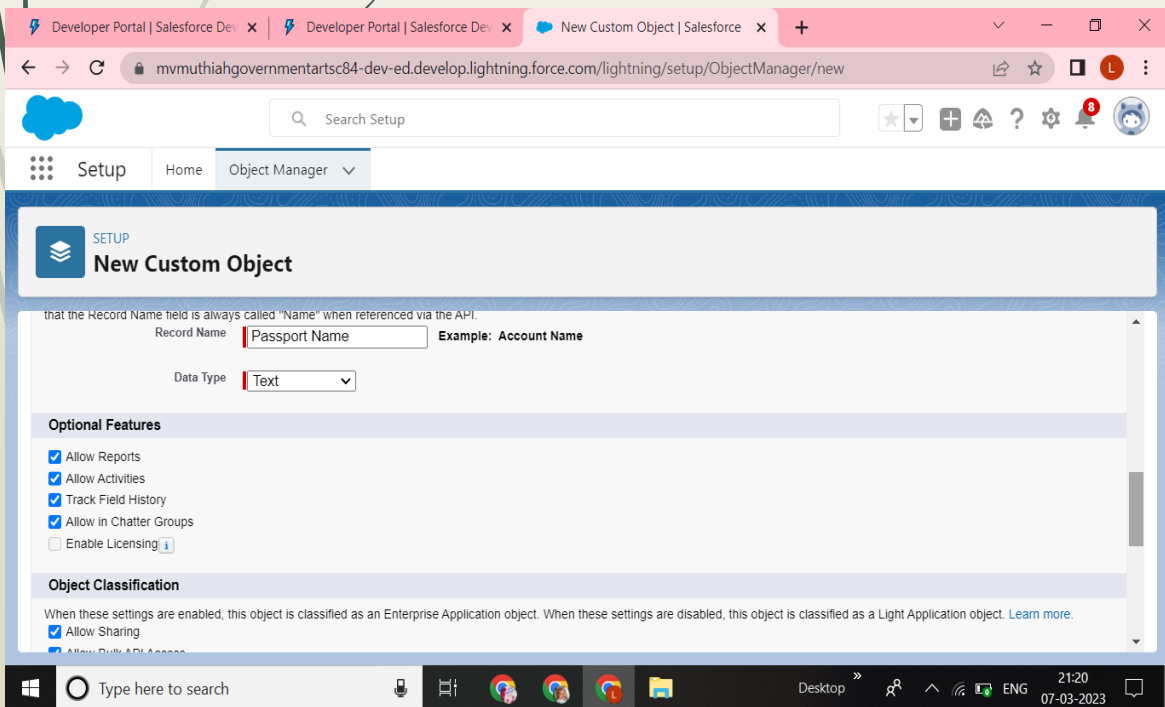
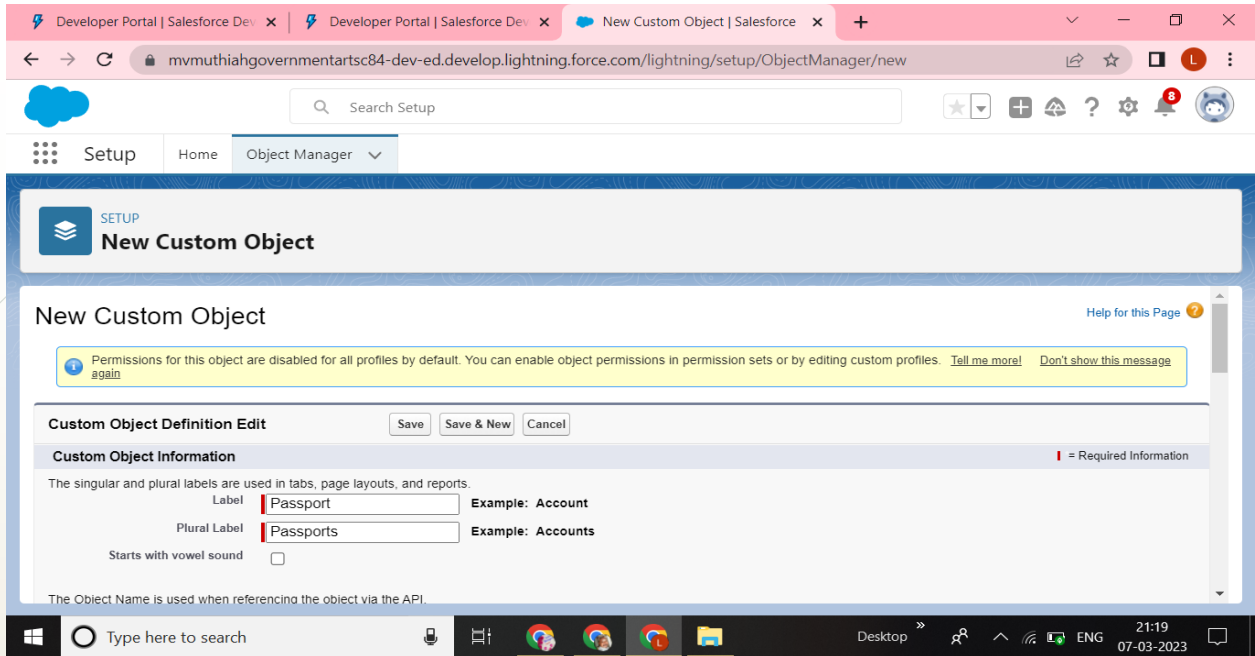
Objects are database tables that permit you to store data that is specific to an organization.
Salesforce objects are of two types:

- 1) Standard objects.
- 2) custom objects.

Activity-1:

Creation of custom object: Passport

- 1) Navigate to setup and select object manager
- 2) At the top of the right side there you can find create custom object.
- 3) You will navigate to custom object definition edit where you have to give the object name.
- 4) The label name has Passport and 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 deployed option.
- 8) 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.
- 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

Field Name

- 1) Contact Number
- 2) Full Name
- 3) Passport Number
- 4) Permanent Address

Data Type

- Number
- Text
- Text
- Text

The screenshot shows the 'New Custom Object' setup page in Salesforce. The browser address bar indicates the URL: `mvmuthiahgovernmentartsc84-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new`. The page has a search bar and navigation tabs for 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'New Custom Object' and includes a 'Context-Sensitive Help Setting' with two radio buttons: 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page'. Below this is a 'Content Name' dropdown menu set to '--None--'. A section titled 'Enter Record Name Label and Format' provides instructions on record naming conventions. It includes a 'Record Name' input field with the text 'Visa slot Name' and an 'Example: Account Name'. A 'Data Type' dropdown menu is set to 'Text'.

The screenshot shows the 'Custom Tabs' setup page in Salesforce. The browser address bar indicates the URL: `mvmuthiahgovernmentartsc84-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fs...`. The page has a search bar and navigation tabs for 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'Tabs' and includes a search bar with the text 'relationship'. Below this is a section titled 'Objects and Fields' with a search bar and a message: 'Didn't find what you're looking for? Try using Global Search.' The main content area includes a section titled 'Select an existing custom object or create a new custom object now.' with an 'Object' dropdown menu set to 'Visa slot' and a 'Tab Style' dropdown menu set to 'Sailboat'. Below this is a section titled '(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.' with a 'Splash Page Custom Link' dropdown menu set to '--None--'. A 'Description' input field is also present.

Developer Portal | Salesforce Dev x | Developer Portal | Salesforce Dev x | Contact Number | Salesforce x +

mvmuthiahgovernmentartsc84-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003Ww80/De...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Contact Number

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits

Description
A phone number that someone can be contacted on.

API Name
Contact_Number__c

Custom
✓

Singular Label
Contact Number

Plural Label
Contact Numbers

Enable Reports
✓

Track Activities
✓

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Type here to search

Desktop 11:24 08-03-2023

Developer Portal | Salesforce Dev x | Developer Portal | Salesforce Dev x | New Custom Object | Salesforce x +

mvmuthiahgovernmentartsc84-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Search Setup

Setup Home Object Manager

SETUP

New Custom Object

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name **Example: Account Name**

Data Type

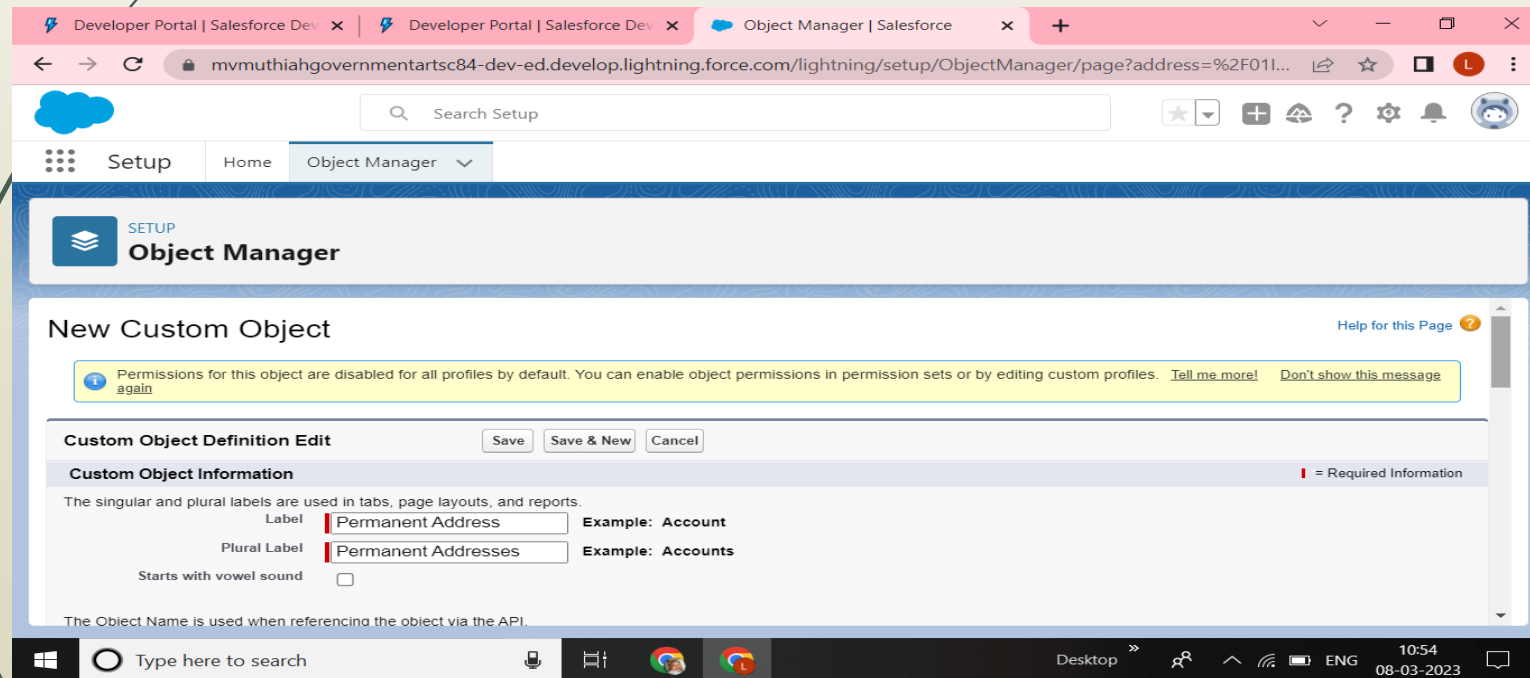
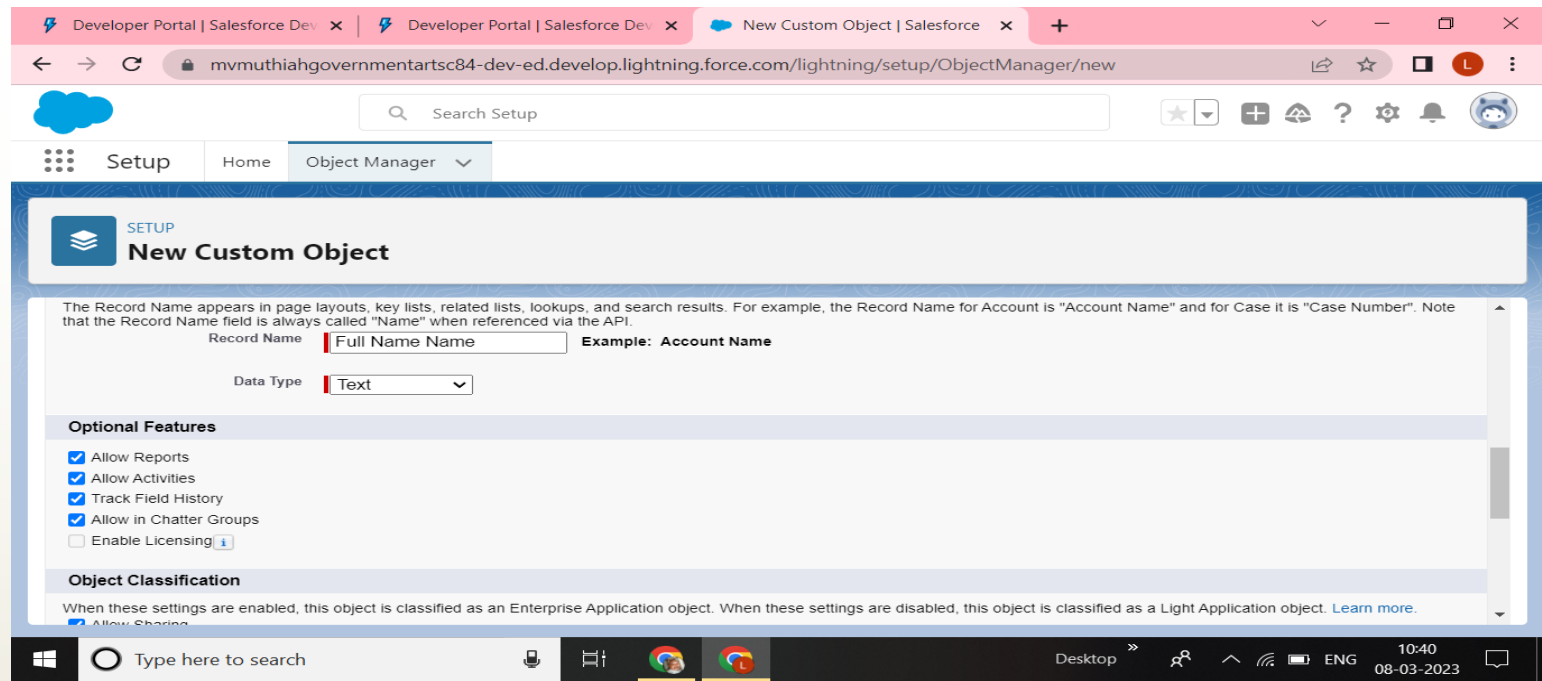
Optional Features

- ☒ Allow Reports
- ☒ Allow Activities
- ☒ Track Field History
- ☒ Allow in Chatter Groups
- ☐ Enable Licensing ⓘ

Object Classification

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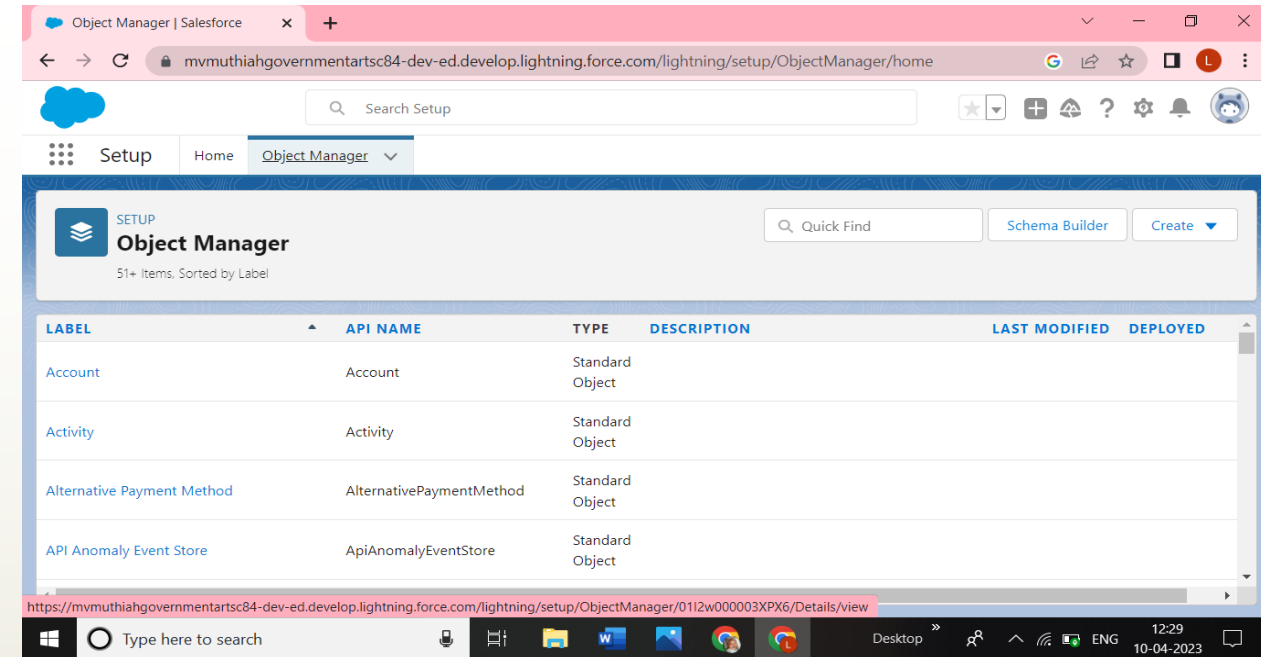
CREATION OF FIELD

Creation of fields on custom Object: Passport

- 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.

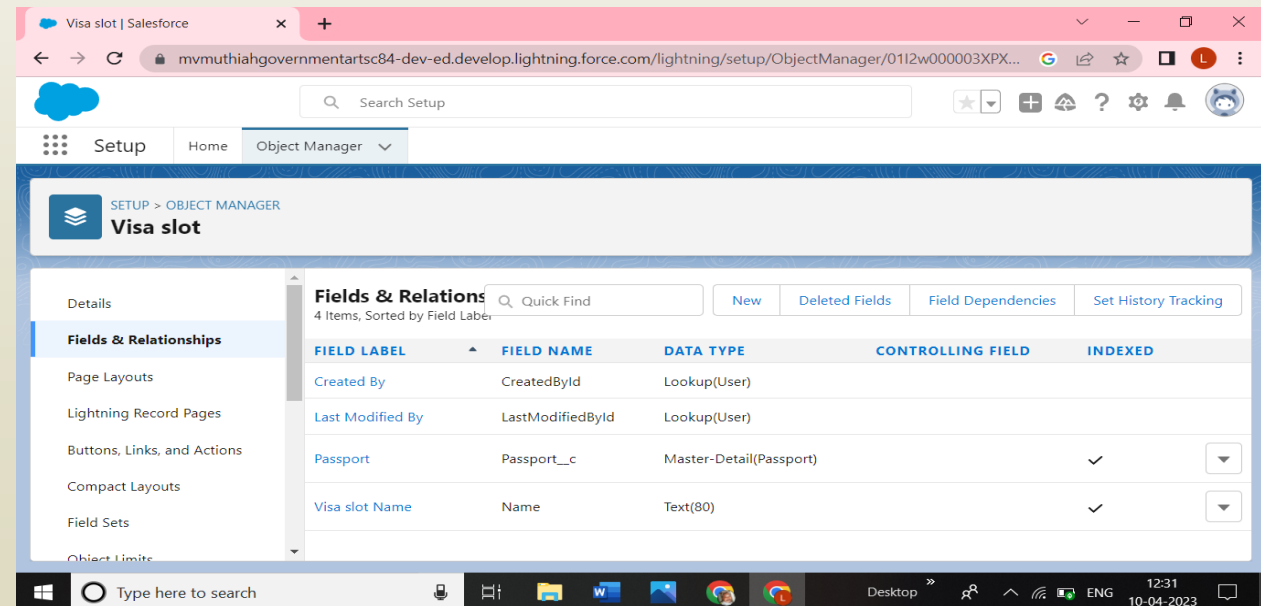
Click next you will navigate to field level security click on visible checkbox so that it is visible to all profiles.

- 9) Select the next option, select the page layout and save it.



The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main header displays 'Object Manager' with a 'Quick Find' search bar and buttons for 'Schema Builder' and 'Create'. Below the header is a table listing standard objects:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			



The screenshot shows the 'Fields & Relationships' section for the 'Passport' object. The left sidebar lists navigation options: 'Details', 'Fields & Relationships' (selected), 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', and 'Object Limits'. The main area displays a table of fields:

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

Relationship B/w Objects:

Relationship in Salesforce is a 2-way association between 2 objects. Using relationships we can link objects with each other and we can make connections and display data about other related objects. There are two type of relationships 1) Master detail relationship 2) Look up relationship 3) Many to many relationship:

Activity-1:

Creation of Relationship:

To create a Master Detail relationship between Passport and Visa.

- 1) Go to the Set Up 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 has Master detail relationship
- 5) And select related to the object has 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 next page and save it.

The screenshot shows the Salesforce Setup interface. The breadcrumb trail is 'Setup > OBJECT MANAGER'. The 'Visa slot' object is selected. The 'Fields & Relationships' tab is active. The 'Custom Field Definition Detail' page is shown for the 'Passport' custom field. The field information table is as follows:

Field Label	Passport	Object Name	Visa slot
Field Name	Passport	Data Type	Master-Detail
API Name	Passport__c		
Description			
Help Text			
Data Owner			
Field Usage			

The bottom of the screen shows the Windows taskbar with the search bar and various application icons.

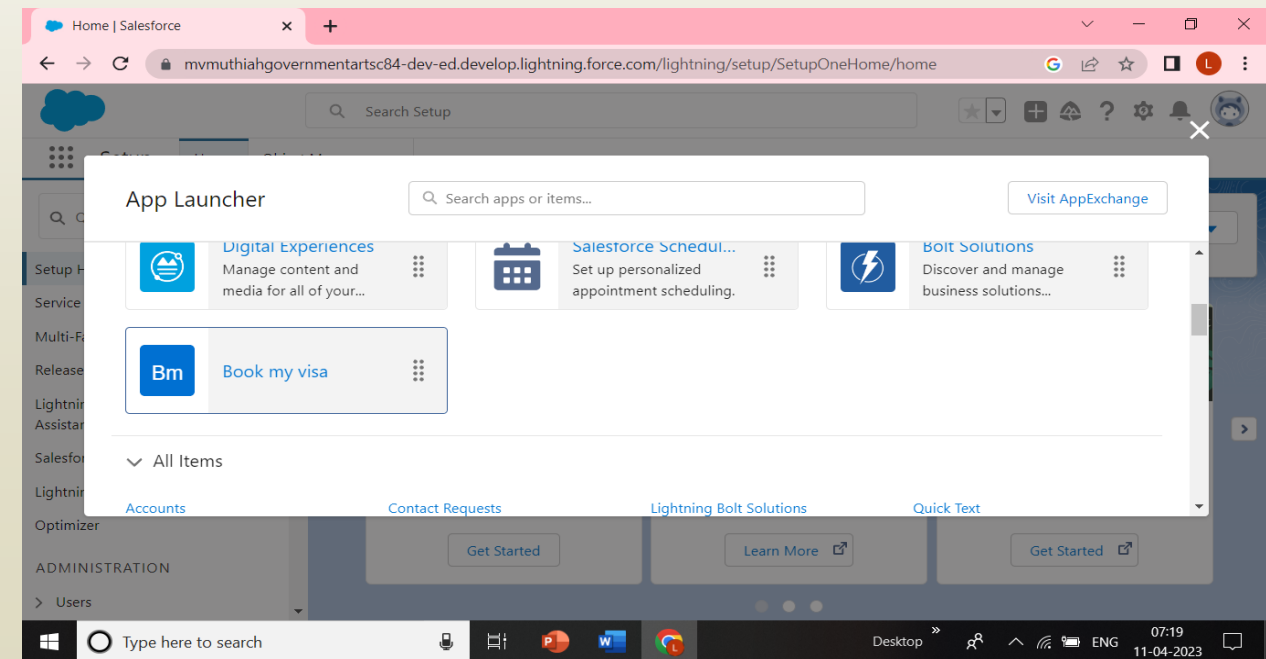
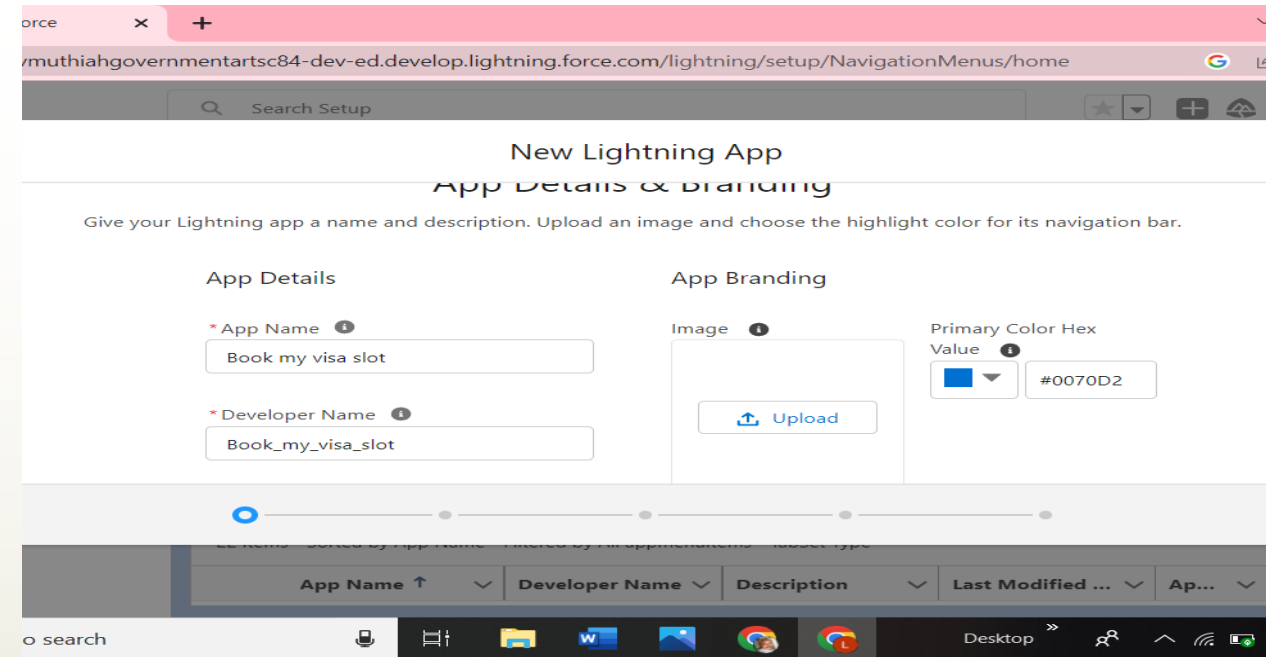
App:

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 Apps

Activity: 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.

- 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.



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.

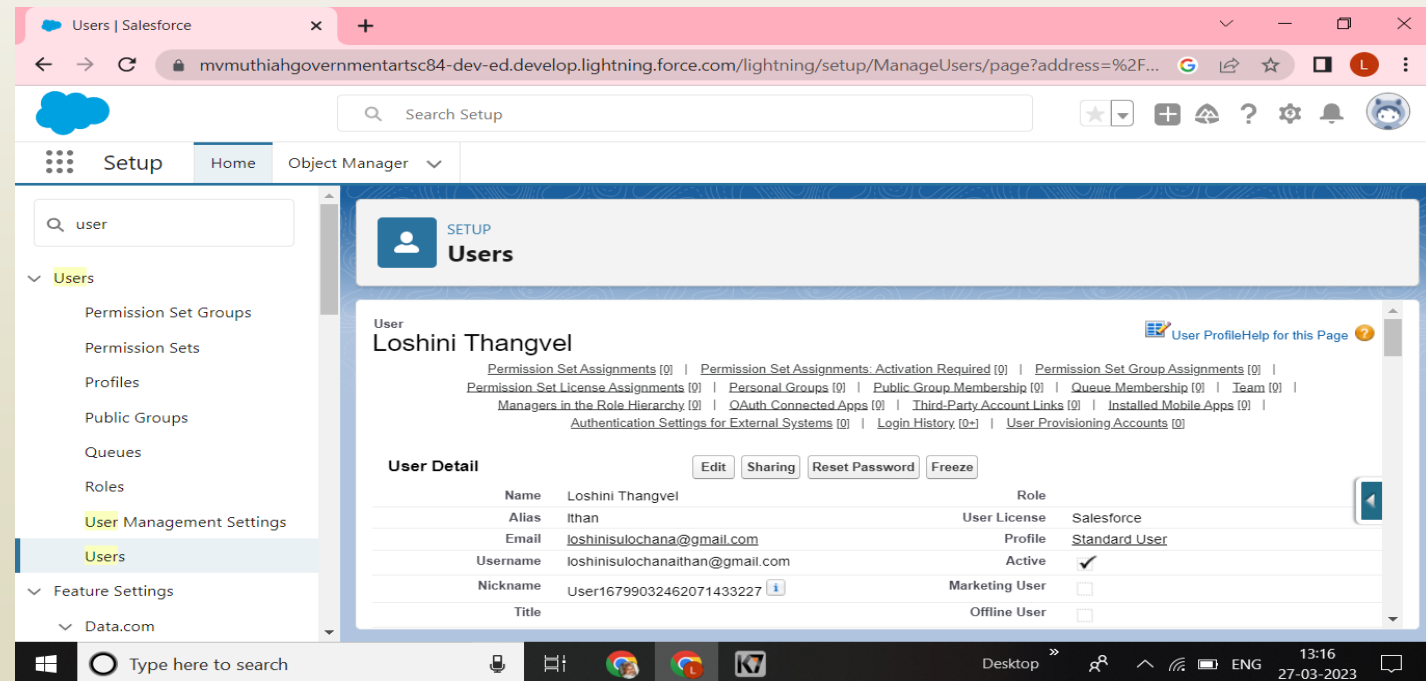
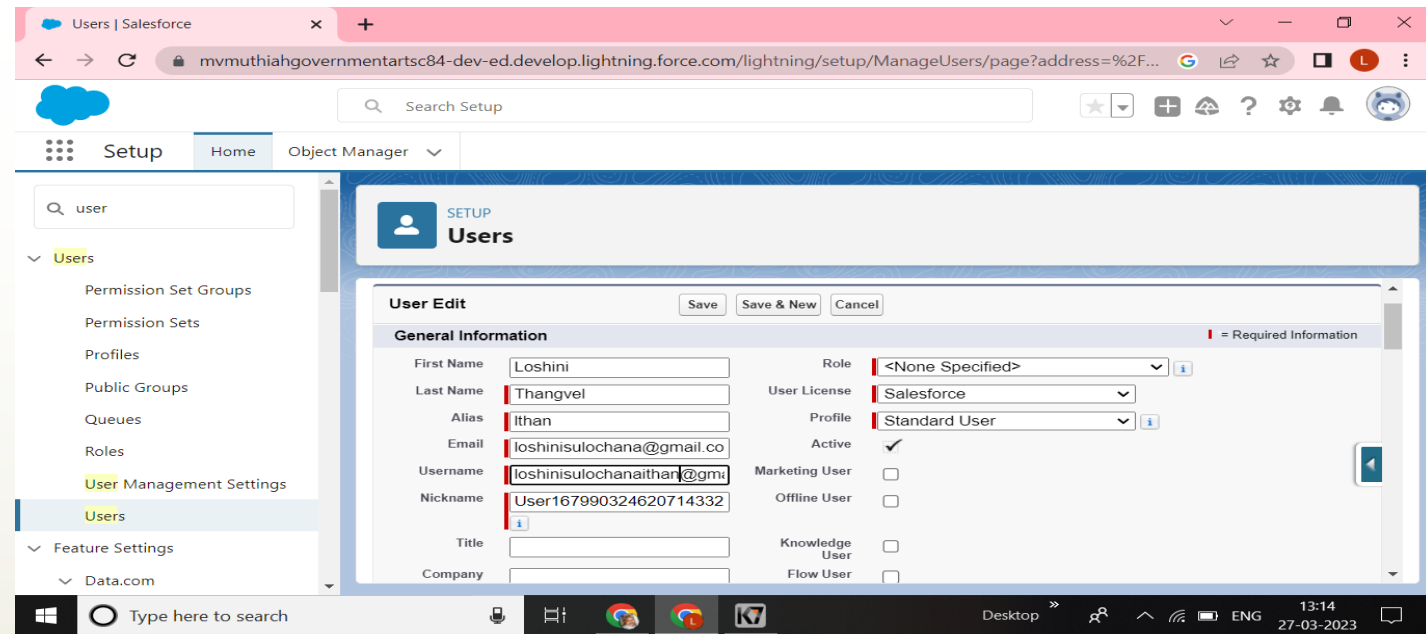
Activity-1:

Creation of User

- 1) Navigate to setup in 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.

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:

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

- 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 Setup page for Sharing Settings. The left sidebar has a search bar with 'shar' entered, and the 'Sharing Settings' link is highlighted under the 'Security' section. The main content area is titled 'Organization-Wide Sharing Defaults Edit' and includes a 'Help for this Page' link. Below the title is a table with columns: Object, Default Internal Access, Default External Access, and Grant Access Using Hierarchies. The table lists objects like Lead, Account and Contract, Order, Contact, and Asset, with their respective default access settings.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Account and Contract	Public Read/Write	Private	<input checked="" type="checkbox"/>
Order	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Contact	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Asset	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>

The screenshot shows the Salesforce Setup page for Sharing Settings, specifically the 'Passport' object. The left sidebar has a search bar with 'shar' entered, and the 'Sharing Settings' link is highlighted under the 'Security' section. The main content area is titled 'Organization-Wide Sharing Defaults Edit' and includes a 'Help for this Page' link. Below the title is a table with columns: Object, Default Internal Access, Default External Access, and Grant Access Using Hierarchies. The table lists objects like Work Step Template, Work Type, Work Type Group, Contact Number, Full Name, Passport, Passport Number, and Permanent Address, with their respective default access settings.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Work Step Template	Private	Private	<input checked="" type="checkbox"/>
Work Type	Private	Private	<input checked="" type="checkbox"/>
Work Type Group	Public Read/Write	Private	<input checked="" type="checkbox"/>
Contact Number	Public Read/Write	Private	<input checked="" type="checkbox"/>
Full Name	Public Read/Write	Private	<input checked="" type="checkbox"/>
Passport	Public Read/Write	Public Read/Write	<input checked="" type="checkbox"/>
Passport Number	Public Read/Write	Private	<input checked="" type="checkbox"/>
Permanent Address	Public Read/Write	Private	<input checked="" type="checkbox"/>

Other Settings: Standard Report Visibility ☒ Manual User Record Sharing ☐ Manager Groups ☐ SecureRequire guest permission user to view

Reports:

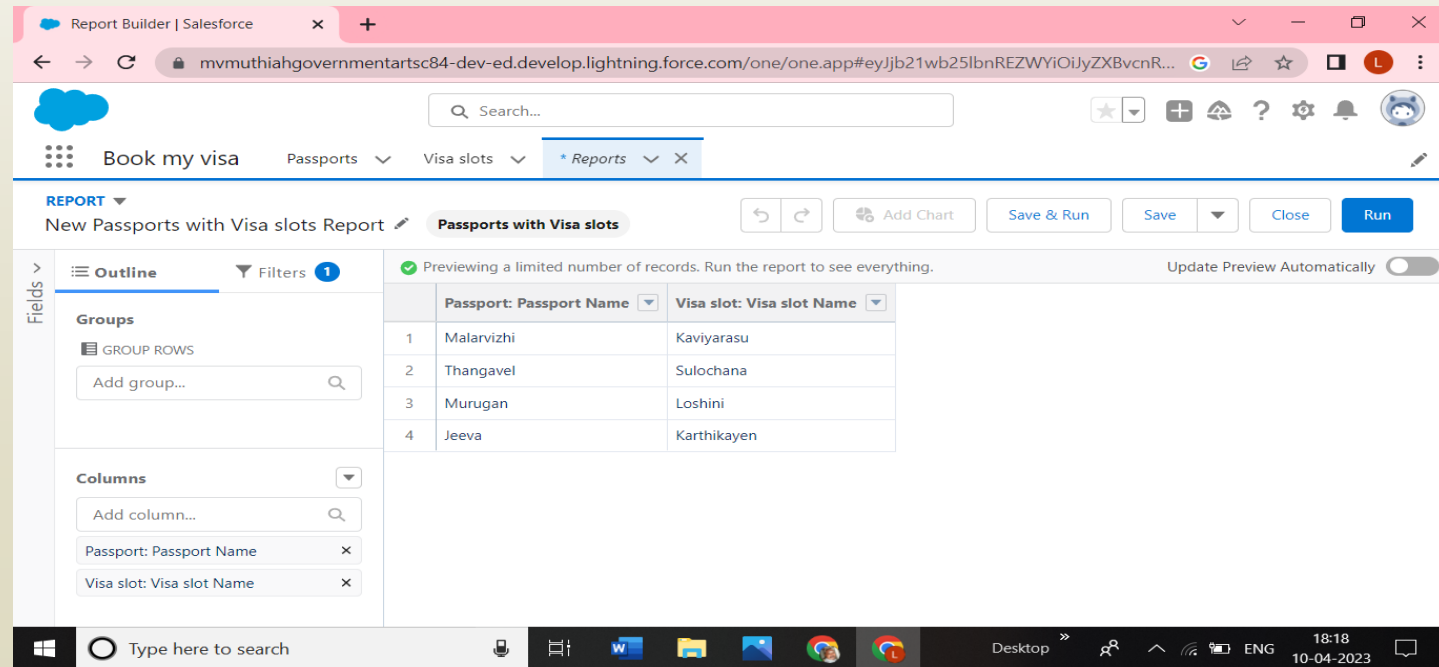
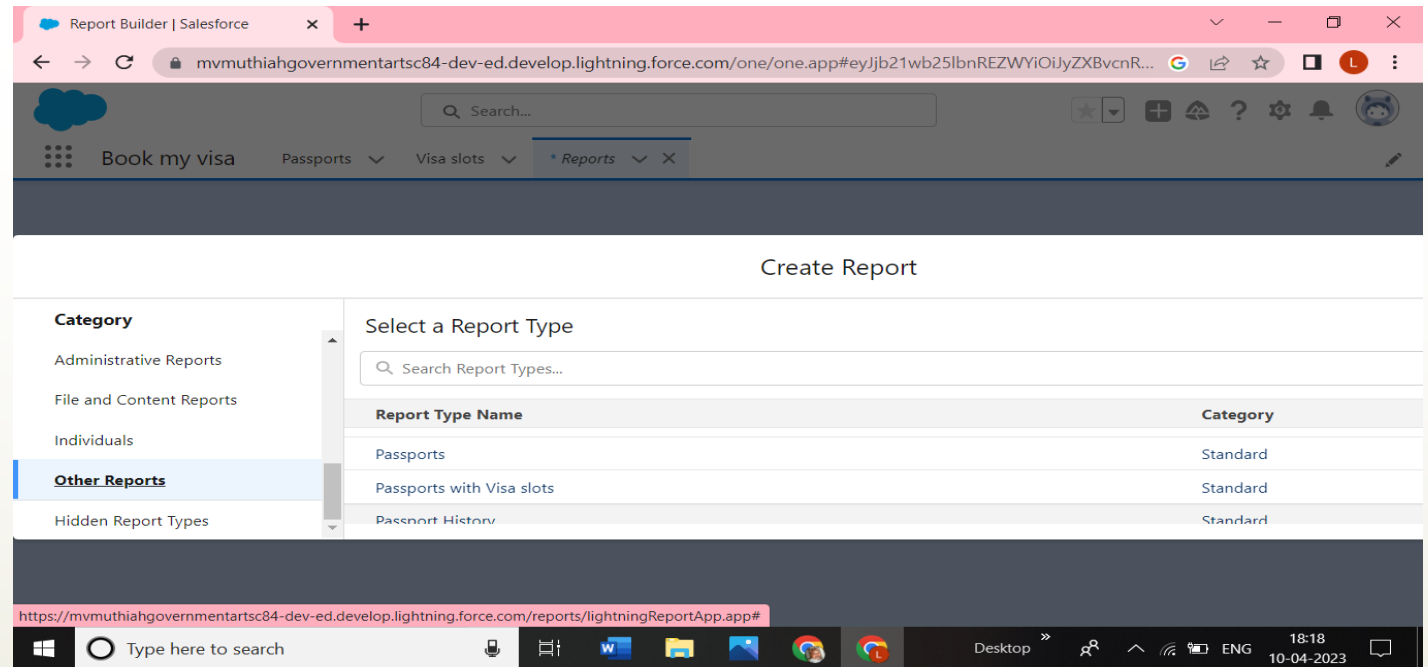
A report is a list of records that meet the criteria you define. It's displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

Activity-1: Creation of report

- 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.

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.

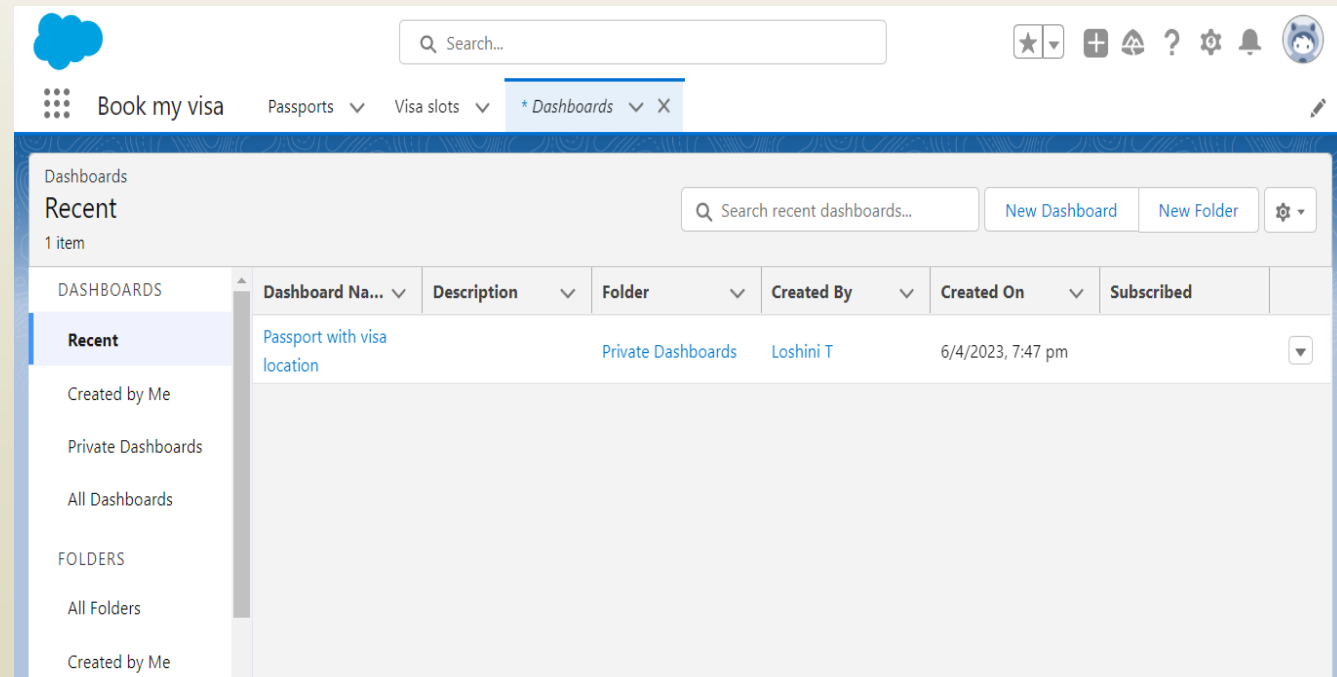
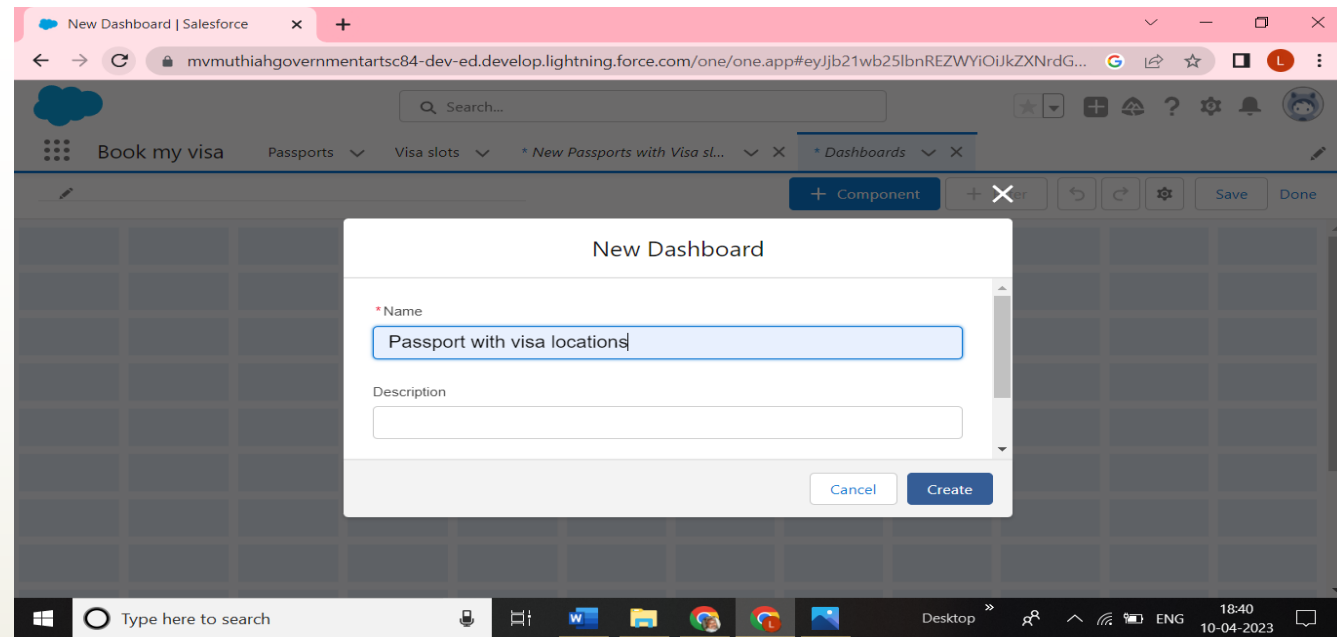


Dashboards:


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

Activity Creation of Dashboard

- 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 location.
- 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



CONCLUSION



Customer Relationship Management enables a company to align its strategy with the needs of the customer in order to best meet those needs and thus ensure long-term customer loyalty. However, in order to be successful in these aims, the different company departments have to work together and use measures in a coordinated fashion. This purpose is achieved via a customer database which is analyzed and updated using CRM software.

This approach will be of particular interest to companies operating in highly competitive markets where it is difficult to attract new customers.



THANK
YOU