



GOVERNMENT OF TAMILNADU

Naan Muthalvan - Project-Based Experiential Learning

A CRM APPLICATION THAT HELPS TO BOOK A VISA SLOT

Submitted by

T. LOSHINI (20321ER015)

D.LOGAPRIYA (20321ER014)

S. MARCELINE SELASTINA (20321ER016)

M.POOVIZHI (20321ER018)

TEAM ID - NM2023TMID19347

Under the guidance of

Mrs. V.G. SRIRAJESWARI M.SC., B.ED., M.Phil.,

Guest Lecturer

PG and Research Department of Mathematics



M.V.MUTHIAH GOVERNMENT ARTS COLLEGE FOR WOMEN

**(Affiliated To Mother Teresa Women' s
University, Kodaikanal)**

Reaccredited with " A" Grade by NAAC

DINDIGUL-624001.

APRIL - 2023

M.V.MUTHIAH GOVERNMENT ARTS COLLEG FOR WOMEN

(Affiliated to Mother Teresa Women' s University, Kodaikanal)

Reaccredited with " A" Grade by NAAC

Dindigul - 624 001



PG & RESEARCH DEPARTMENT OF MATHEMATICS

BONAFIDE CERTIFICATE

This is to certify that this is a bonafide record of the project entitled, "**A CRM APPLICATION THAT HELPS TO BOOK A VISA SLOT**" done by **Ms.T.LOSHINI (20321ER015)**, **Ms.D.LOGAPRIYA (20321ER014)**, **Ms.S.MARCELINE SELASTINA (20321ER016)**, **Mrs.M.POOVIZHI (20321ER018)**. This is submitted in partial fulfillment for the award of the degree of **Bachelor of Science in Mathematics** in **M.V.MUTHIAH GOVERNMENT ARTS COLLEGE FOR WOMEN,DINDIGUL** during the period of December 2022 to April 2023.

Sri Raji

Project Mentor(s)

Head of the Department

Submitted for viva-voce Examination held on 12.04.2023

A CRM APPLICATION THAT HELPS TO BOOK A VISA SLOT

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.

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 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.

1.2 PURPOSE

Customer Relationship Management (CRM) is a technology for managing all your company's relationship and interactions with customers and potential customers. The goal is simple: Improve business relationships. A CRM system helps companies stay connected to customers, streamline processes, and improve profitability.

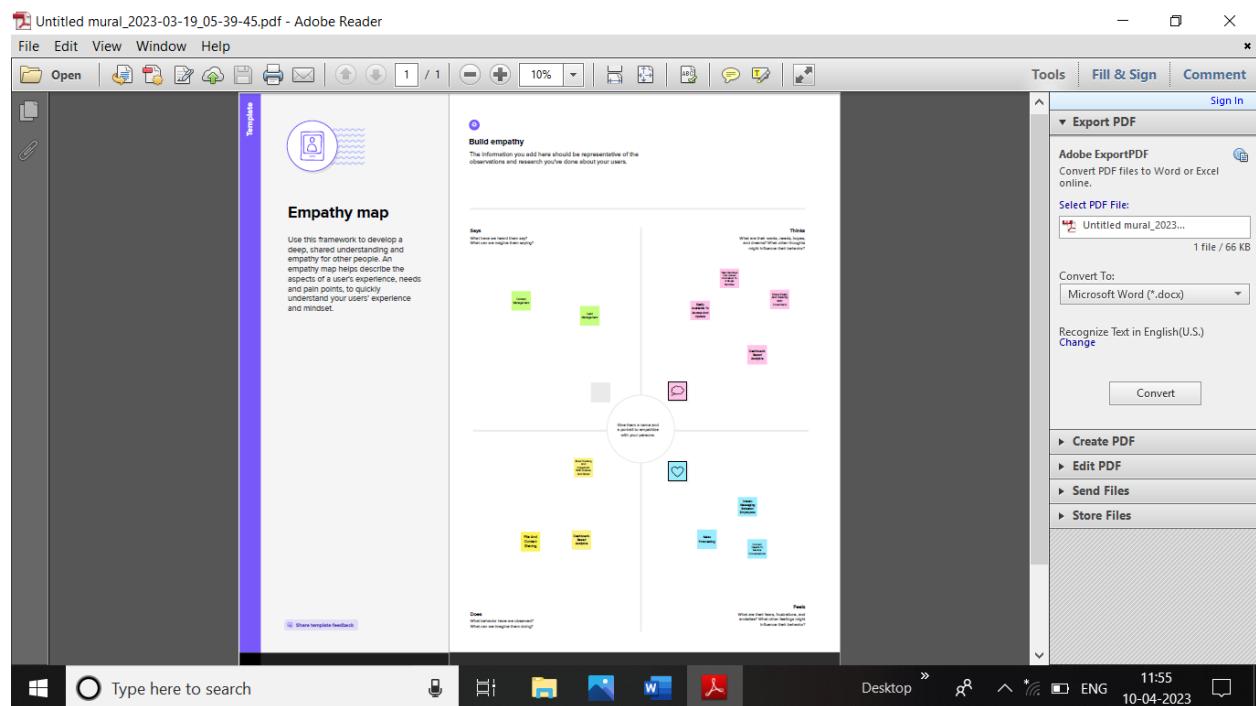
PROBLEM DEFINITION & DESIGN THINKING

2.1 EMPATHY MAP

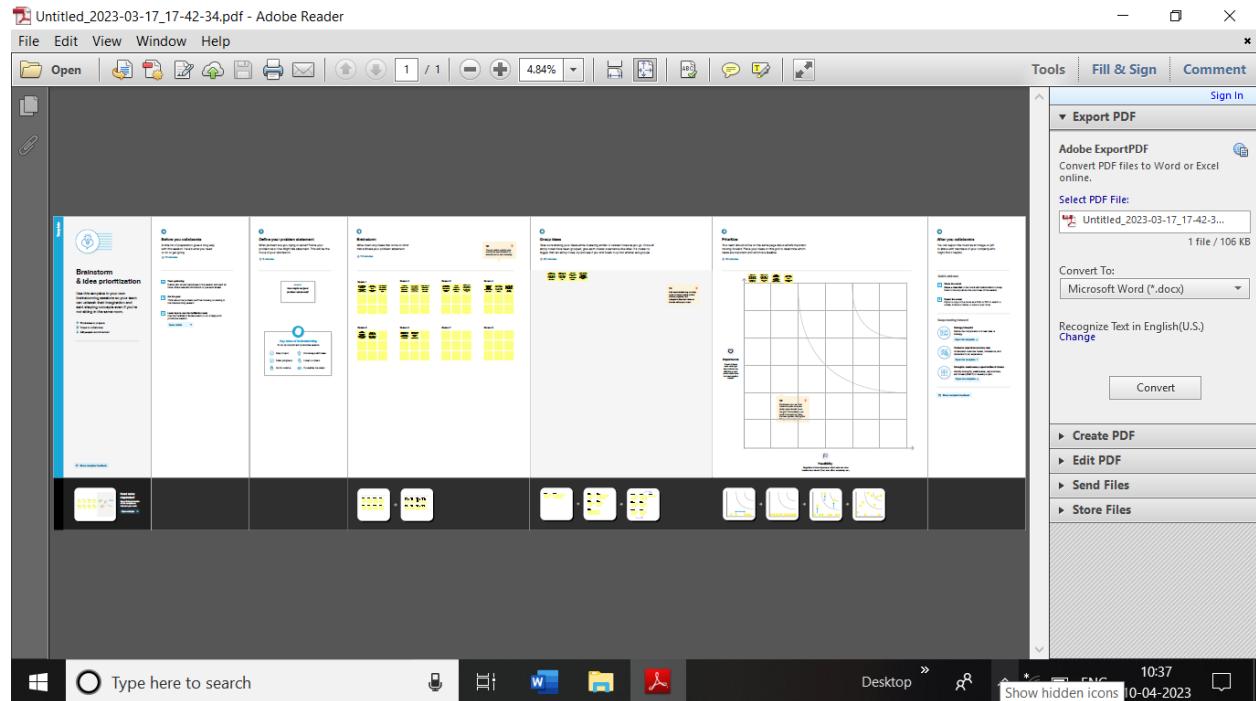
An Empathy Map is a simple, easy-to-digest visual that captures knowledge about a user's behaviours and attitudes.

It is useful tool to helps teams better understanding 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.



2.2 IDEATION & BRAINSTROMING MAP



RESULT

3.1 DATA MODEL:

OBJECT NAME	FIELDS IN THE OBJECT	
Passport	Field Label	Data Type
	Passport	Text
Contact Number	Field Label	Data Type
	Contact Number	Number
Full Name	Field Label	Data Type
	Full Name	Text
Passport Number	Field Label	Data Type
	Passport Number	Text
Permanent Address	Field Label	Data Type
	Permanent Address	Text
Visa slot	Field Label	Data Type
	Visa slot	Text

3.2 ACTIVITY & SCREENSHOT

Creation of developer org

Activity 1:

Creating Developer Account

Creating a developer org in salesforce.

1. Go to [developers.salesforce.com/](https://developer.salesforce.com/)
2. Click on sign up.
3. 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

The screenshot shows a Google search results page with the query "salesforce developer login". The top result is the official Salesforce login page, followed by links to the developer portal and developer edition signup. The search bar shows the query, and the results include links to "Sales Force" and "Salesforce Developers: Developer Portal".

Sales Force
https://login.salesforce.com › ...

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

Sales Force
https://developer.salesforce.com › ...

Salesforce Developers: Developer Portal
Login into access a rich community of Salesforce Developers, get ideas, and find solutions. Developer Forums. You've visited this page many times. Last visit: 28/3/23

Sales Force
https://developer.salesforce.com › signup › ...

Developer Edition Signup
Sign up for your Salesforce Developer Edition ... Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

Sales Force
https://developer.salesforce.com › auth › login › ...

Type here to search

Developer Portal | Salesforce Dev . Salesforce Developer Community +

developer.salesforce.com/forums#!/feedtype=RECENT&criteria=ALLQUESTIONS&

The screenshot shows the "Discussion Forums" section of the Salesforce Developer Community. It features a sidebar with topics like Apex Code Development, General Development, Visualforce Development, Lightning, APIs and Integration, Trailhead, Formulas & Validation Rules, Discussion, Other Salesforce Applications, Jobs Board, Force.com Sites & Site.com, and Mobile. The main area has a search bar and a list of questions sorted by Date Posted.

developers PRODUCTS DOCS LEARN COMMUNITY BLOG COVID-19

Home » Discussion Forums

Login with Salesforce
Don't have an account?
Signup for a Developer Edition

Browse by Topic

- Apex Code Development (89925)
- General Development (54741)
- Visualforce Development (37153)
- Lightning (17624)
- APIs and Integration (16787)
- Trailhead (11585)
- Formulas & Validation Rules
- Discussion (11181)
- Other Salesforce Applications (8014)
- Jobs Board (6637)
- Force.com Sites & Site.com (4801)
- Mobile (2669)

[View More Topics](#)

What would you like to know?

Show All Questions sorted by Date Posted

Loading...

FEEDBACK

Waiting for privacyportal.onetrust.com...

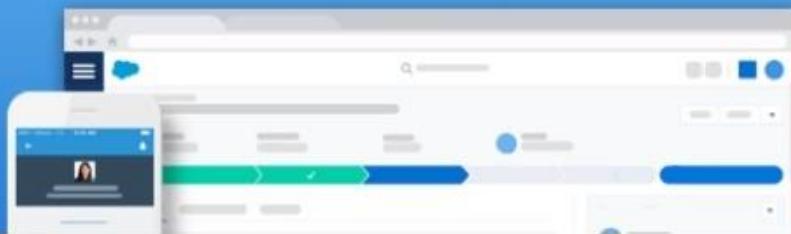
Type here to search

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



Thanks for signing up with Salesforce!



Click below to verify your account.

[Verify Account](#)

To easily log in later, save this URL:

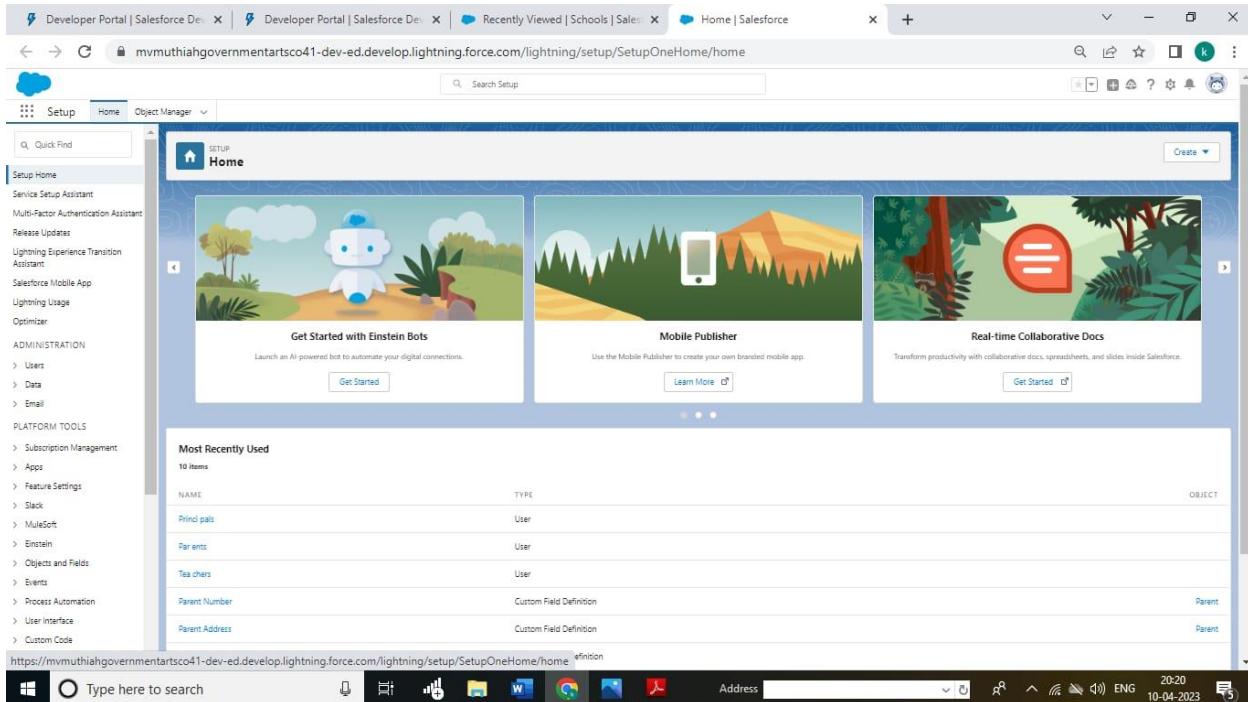
<https://mvmuthiahgovernmentartsc84-dev-ed.develop.my.salesforce.com>

Username:
loshinisulochana@gmail.com

Again, welcome to Salesforce!

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.

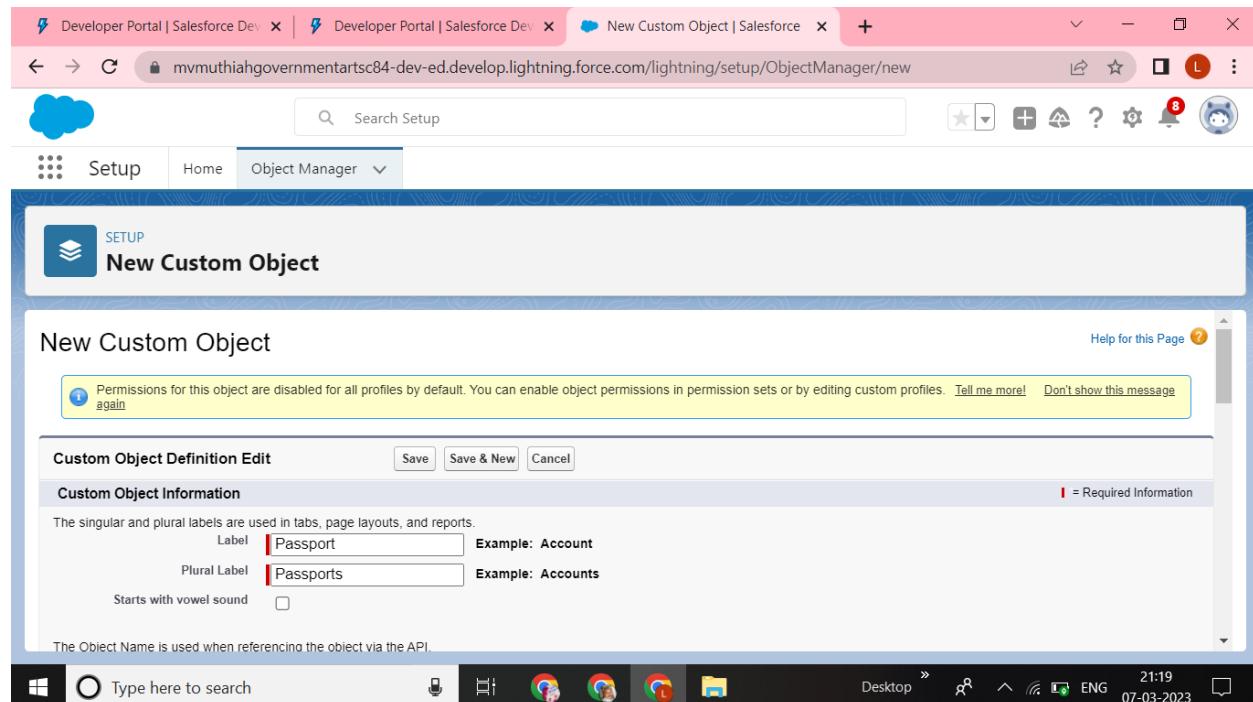
Objects involved in Book my visa are:

Objects	Passport	Visa slot	Payment	Reschedule/Cancel
Fields	Full name	Location	Payment Mode	Passport number(Master)
Fields	Passport number	Time	Card Number	Location
Fields	Contact number	Passport number (Master)	Transaction id (Auto number)	Time
Fields	Permanent Address	Visa slot number	Cancel Transaction	Cancel
			Visa slot number(Master)	Status

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.



The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A new custom object is being created with the following details:

- Object Name:** Passport
- Description:** (Empty text area)
- Context-Sensitive Help Setting:** Open the standard Salesforce.com Help & Training window
- Content Name:** None

The status bar at the bottom indicates it's 21:20 on 07-03-2023.

The screenshot shows the 'New Custom Object' page with additional configuration options:

- Record Name:** Passport Name
- Data Type:** Text
- Optional Features:** Allow Reports, Allow Activities, Track Field History, Allow in Chatter Groups (checkboxes checked), Enable Licensing (checkbox unchecked)
- Object Classification:** When these settings are enabled, this object is classified as an Enterprise Application object. Options include Allow Sharing and Allow Bulk API Access.

The status bar at the bottom indicates it's 21:20 on 07-03-2023.

The screenshot shows the Salesforce Setup interface. In the top navigation bar, there are three tabs: 'Developer Portal | Salesforce Dev' (active), 'Developer Portal | Salesforce Dev', and 'New Custom Object | Salesforce'. The URL in the address bar is mvmuthiahgovernmentarts84-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new. The main content area is titled 'New Custom Object'. It includes sections for 'Deployment Status' (Deployed), 'Search Status' (Allow Search checked), and 'Object Creation Options' (Launch New Custom Tab Wizard after saving this custom object checked). At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface. In the top navigation bar, there are three tabs: 'Developer Portal | Salesforce Dev' (active), 'Developer Portal | Salesforce Dev', and 'Home | Salesforce'. The URL in the address bar is mvmuthiahgovernmentarts84-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2FobjectManager%2Fnew. The main content area is titled 'Tabs' and 'New Custom Object Tab'. It shows 'Step 1. Enter the Details' with a sub-instruction: 'Choose the custom object for this new custom tab. Fill in other details.' A dropdown menu for 'Object' shows 'Passport' selected. Below it, 'Tab Style' is set to 'Helicopter'. At the bottom, there is an optional field for 'Splash Page Custom' with the value '--None--'. The status bar at the bottom right shows the date as 07-03-2023 and the time as 21:30.

Activity-2:

Fields available on custom object: Passport

Field Name	Data Type
1) Contact Number	Number
2) Full Name	Text
3) Passport Number	Text
4) Permanent Address	Text

The screenshot shows the Salesforce Tabs setup page. The top navigation bar has three tabs: 'Developer Portal | Salesforce Dev' (active), 'Developer Portal | Salesforce Dev', and 'Home | Salesforce'. The main content area is titled 'SETUP Tabs'. It displays a form for creating a new custom tab. The 'Object' dropdown is set to 'Contact Number'. The 'Tab Style' is selected as 'Cell phone'. Below the form, there's a note about choosing a splash page custom link. The left sidebar lists various setup categories like Service Setup Assistant, Release Updates, and Administration.

The screenshot shows the Contact Number object details page in the Object Manager. The top navigation bar has three tabs: 'Developer Portal | Salesforce Dev' (active), 'Developer Portal | Salesforce Dev', and 'Contact Number | Salesforce'. The main content area is titled 'SETUP > OBJECT MANAGER Contact Number'. On the left, a sidebar lists fields like Details, Fields & Relationships, Page Layouts, etc. The right panel shows the object's description ('A phone number that someone can be contacted on.'), API name ('Contact_Number_c'), and various settings checkboxes. The status is listed as 'Deployed'.

The screenshot shows the Salesforce Setup interface with the title 'New Custom Object'. The 'Custom Object Definition Edit' screen is displayed, featuring fields for 'Label' (Full Name) and 'Plural Label' (Full Name). A note indicates that the object name is used via the API. The 'Object Name' field contains 'Full_Name'. A 'Description' field is present but empty. The top navigation bar includes tabs for 'Setup', 'Home', and 'Object Manager'. The status bar at the bottom shows a Windows taskbar with icons for microphone, desktop, and network.

This screenshot continues from the previous one, showing the 'New Custom Object' page with additional configuration options. Under 'Optional Features', checkboxes are checked for 'Allow Reports', 'Allow Activities', 'Track Field History', and 'Allow in Chatter Groups'. An unchecked checkbox for 'Enable Licensing' is also present. The 'Object Classification' section notes that the object is classified as an Enterprise Application object. The status bar at the bottom shows a Windows taskbar with icons for microphone, desktop, and network.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The main content area is titled 'New Custom Object'. It includes sections for 'Deployment Status' (Deployed), 'Search Status' (Allow Search checked), and 'Object Creation Options' (Launch New Custom Tab Wizard after saving this custom object checked). At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The main content area is titled 'Tabs'. It allows selecting an existing custom object or creating a new one. The 'Object' dropdown is set to 'Full Name'. The 'Tab Style' is set to 'People'. An optional 'Splash Page Custom Link' is set to '--None--'. A description field is present at the bottom.

The screenshot shows the Salesforce Object Manager interface for the 'Full Name' object. The left sidebar lists various setup categories: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, and Field Sets. The main pane displays the 'Details' section for the 'Full Name' object. It includes fields for Description, API Name (Full_Name__c), Singular Label (Full Name), Plural Label (Full Name), and several checkboxes for reports, activities, field history, and deployment status. The status is listed as 'Deployed'. A note at the bottom points to the standard salesforce.com Help Window.

The screenshot shows the Salesforce Setup Home page. The left sidebar has links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and ADMINISTRATION. The main pane displays a 'Most Recently Used' section with a table showing 6 items. The table has columns for NAME, TYPE, and OBJECT. The items listed are:

NAME	TYPE	OBJECT
Full Name	Custom Object Definition	
Full Name	Custom Tab Definition	Full Name
Parent	Custom Object Definition	
Passport	Custom Object Definition	
Loshini T	User	
Passports	Custom Tab Definition	Passport

The screenshot shows the Salesforce Setup interface with the title 'New Custom Object'. The page is titled 'Custom Object Information'. It includes fields for 'Label' (Passport Number), 'Plural Label' (Passport Numbers), and 'Object Name' (Passport_Number). A 'Description' field is also present. A note at the top states: 'The singular and plural labels are used in tabs, page layouts, and reports.' A legend indicates that a red border around input fields means 'Required Information'. The browser address bar shows the URL: mvmuthiahgovernmentarts84-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new.

This screenshot continues from the previous one, showing the 'New Custom Object' page. It includes sections for 'Record Name Label and Format' (Record Name: Passport Number Name, Data Type: Text) and 'Optional Features' (Allow Reports, Allow Activities, Track Field History, Allow in Chatter Groups, Enable Licensing). Below these is an 'Object Classification' section. The browser address bar remains the same: mvmuthiahgovernmentarts84-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new.

The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** Three tabs are visible: "Developer Portal | Salesforce Dev" (active), "Developer Portal | Salesforce Dev", and "New Custom Object | Salesforce".
- Search Bar:** A search bar at the top right contains the text "Search Setup".
- Navigation:** The top navigation bar includes links for "Setup", "Home", and "Object Manager".
- Section Headers:** The main content area has sections for "Deployment Status", "Search Status", and "Object Creation Options".
- Deployment Status:** Shows "In Development" (radio button) is selected.
- Search Status:** Describes how users can find records of this object type when they search. It includes a checkbox for "Allow Search" which is checked.
- Object Creation Options:** Available only when the custom object is first created. It includes checkboxes for "Add Notes and Attachments related list to default page layout" (unchecked) and "Launch New Custom Tab Wizard after saving this custom object" (checked).
- Buttons:** At the bottom are "Save", "Save & New", and "Cancel" buttons.
- System Status Bar:** The bottom right shows system status: Desktop, battery level, ENG, 10:49, 08-03-2023.

The screenshot shows the Salesforce Object Manager interface with the following details:

- Page Header:** Three tabs are visible: "Developer Portal | Salesforce Dev" (active), "Developer Portal | Salesforce Dev", and "Passport Number | Salesforce".
- Search Bar:** A search bar at the top right contains the text "Search Setup".
- Navigation:** The top navigation bar includes links for "Setup", "Home", and "Object Manager".
- Section Headers:** The main content area has sections for "Details" and "Description".
- Details Section:** Includes links for "Fields & Relationships", "Page Layouts", "Lightning Record Pages", "Buttons, Links, and Actions", "Compact Layouts", "Field Sets", and "Object Limits".
- Description Section:** Displays the following fields:
 - API Name: Passport_Number__c
 - Custom: ✓
 - Singular Label: Passport Number
 - Plural Label: Passport Numbers
 - Enable Reports: ✓
 - Track Activities: ✓
 - Track Field History: ✓
 - Deployment Status: Deployed
 - Help Settings: Standard salesforce.com Help Window
- System Status Bar:** The bottom right shows system status: Desktop, battery level, S, ENG, 10:50, 08-03-2023.

The screenshot shows the Salesforce Setup Home interface. On the left, there's a sidebar with links like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration. The main area is titled "Object Manager" and displays a table of custom objects:

NAME	TYPE	OBJECT
Passport Number	Custom Object Definition	
Passport Numbers	Custom Tab Definition	Passport Number
Full Name	Custom Object Definition	
Full Name	Custom Tab Definition	Full Name
Parent	Custom Object Definition	
Passport	Custom Object Definition	
Loshini T	User	
Passports	Custom Tab Definition	Passport

The URL in the browser is <https://mvmuthiahgovernmentartsc84-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fu%2FobjectCustomTabWizard.jsp%3FretURL%3D%252F01l2w0...>.

The screenshot shows the Salesforce Object Manager page for creating a new custom object. The title is "New Custom Object". The "Custom Object Definition Edit" form has the following fields:

- Custom Object Information**:
 - Label: Permanent Address
 - Plural Label: Permanent Addresses
 - Example: Account
 - Example: Accounts
 - Starts with vowel sound:
- A note at the bottom states: "The Object Name is used when referencing the object via the API."

Buttons at the top right include Save, Save & New, and Cancel. A help link "Help for this Page" is also present.

The URL in the browser is <https://mvmuthiahgovernmentartsc84-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F01I...>.

The screenshot shows the Salesforce Object Manager setup page. At the top, there are three tabs: 'Developer Portal | Salesforce Dev' (active), 'Developer Portal | Salesforce Dev', and 'Object Manager | Salesforce'. The URL in the address bar is mvmuthiahgovernmentarts84-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F01I.... The page header includes a cloud icon, a search bar, and various setup tools.

Object Manager

Description: The address of your original house that is the address of your native location.

Context-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window
 Open a window using a Visualforce page

Content Name:

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: Permanent Address Name Example: Account Name

Windows taskbar at the bottom: Type here to search, File Explorer, Google Chrome, Desktop, 10:55, 08-03-2023.

The screenshot shows the Salesforce Object Manager setup page with different configuration sections visible.

Allow Reports
Allow Activities
Track Field History
Allow in Chatter Groups
 Enable Licensing

Object Classification: When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

Allow Sharing
 Allow Bulk API Access
 Allow Streaming API Access

Deployment Status:

In Development
 Deployed

Windows taskbar at the bottom: Type here to search, File Explorer, Google Chrome, Desktop, 10:55, 08-03-2023.

The screenshot shows the Salesforce Object Manager setup page. At the top, there are three tabs: 'Developer Portal | Salesforce Dev' (active), 'Developer Portal | Salesforce Dev', and 'Object Manager | Salesforce'. The URL in the address bar is mvmuthiahgovernmentarts84-dev-ed.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F01.... The page header includes a search bar labeled 'Search Setup' and various navigation icons.

The main content area has a blue header bar with 'SETUP' and 'Object Manager' buttons. Below this is a 'Deployment Status' section with two radio buttons: 'In Development' (unselected) and 'Deployed' (selected). A 'Search Status' section follows, with a note about users finding records through search and a checked checkbox for 'Allow Search'. The 'Object Creation Options' section is available only for custom objects and includes checkboxes for 'Add Notes and Attachments related list to default page layout' (unchecked) and 'Launch New Custom Tab Wizard after saving this custom object' (checked). At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

The screenshot shows the Permanent Address object details page. The top navigation bar has tabs for 'Developer Portal | Salesforce Dev' (active), 'Developer Portal | Salesforce Dev', and 'Permanent Address | Salesforce'. The URL is mvmuthiahgovernmentarts84-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01I2w000003Ww6d/De.... The page header includes a search bar labeled 'Search Setup' and various navigation icons.

The main content area shows the 'Permanent Address' object under 'SETUP > OBJECT MANAGER'. On the left is a sidebar with 'Details' expanded, showing fields like API Name (Permanent_Address__c), Singular Label (Permanent Address), and Plural Label (Permanent Addresses). To the right is a large text area for 'Description' containing the text: 'The address of your original house that is the address of your native location.' On the far right, there are several checkboxes for object settings: 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (checked), 'Deployment Status' (checked), 'Help Settings' (checked), and a link to 'Standard salesforce.com Help Window'.

The screenshot shows the Salesforce Setup Home page. On the left, there's a sidebar with links like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration. Under Administration, there's a link to Users. The main area displays a table of custom objects and tabs:

NAME	TYPE	OBJECT
Permanent Address	Custom Object Definition	
Permanent Addresses	Custom Tab Definition	Permanent Address
Passport Number	Custom Object Definition	
Passport Numbers	Custom Tab Definition	Passport Number
Full Name	Custom Object Definition	
Full Name	Custom Tab Definition	Full Name
Parent	Custom Object Definition	
Passport	Custom Object Definition	

At the bottom, there's a search bar, a taskbar with icons for microphone, calendar, Google Chrome, and Microsoft Edge, and a system tray showing Desktop, battery level, ENG, 10:58, 08-03-2023.

The screenshot shows the "New Custom Object" page in the Salesforce Setup. The title bar says "New Custom Object | Salesforce". The main content area has a header "New Custom Object" and a "Help for this Page" link. A message box at the top says: "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)". Below this is a "Custom Object Definition Edit" form with three buttons: Save, Save & New, and Cancel. The "Custom Object Information" section contains fields for Label (Visa slot), Example: Account, Plural Label (Visa slots), Example: Accounts, and a checkbox for Starts with vowel sound. A note at the bottom says: "The Object Name is used when referencing the object via the API." At the bottom, there's a search bar, a taskbar with icons for microphone, calendar, Google Chrome, and Microsoft Edge, and a system tray showing Desktop, battery level, ENG, 18:54, 25-03-2023.

New Custom Object | Salesforce

mvmuthiahgovernmentarts84-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Setup Home Object Manager

SETUP New Custom Object

Context-Sensitive Help Setting
 Open the standard Salesforce.com Help & Training window
 Open a window using a Visualforce page

Content Name:

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:

Type here to search

Desktop 18:54 25-03-2023

New Custom Object | Salesforce

mvmuthiahgovernmentarts84-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Setup Home Object Manager

SETUP New Custom Object

Allow Reports
 Allow Activities
 Track Field History
 Allow in Chatter Groups
 Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

Allow Sharing
 Allow Bulk API Access
 Allow Streaming API Access

Deployment Status

In Development
 Deployed

Type here to search

Desktop 18:54 25-03-2023

New Custom Object | Salesforce

mvmuthiahgovernmentarts84-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Setup Home Object Manager

New Custom Object

Deployment Status

In Development
 Deployed

Search Status

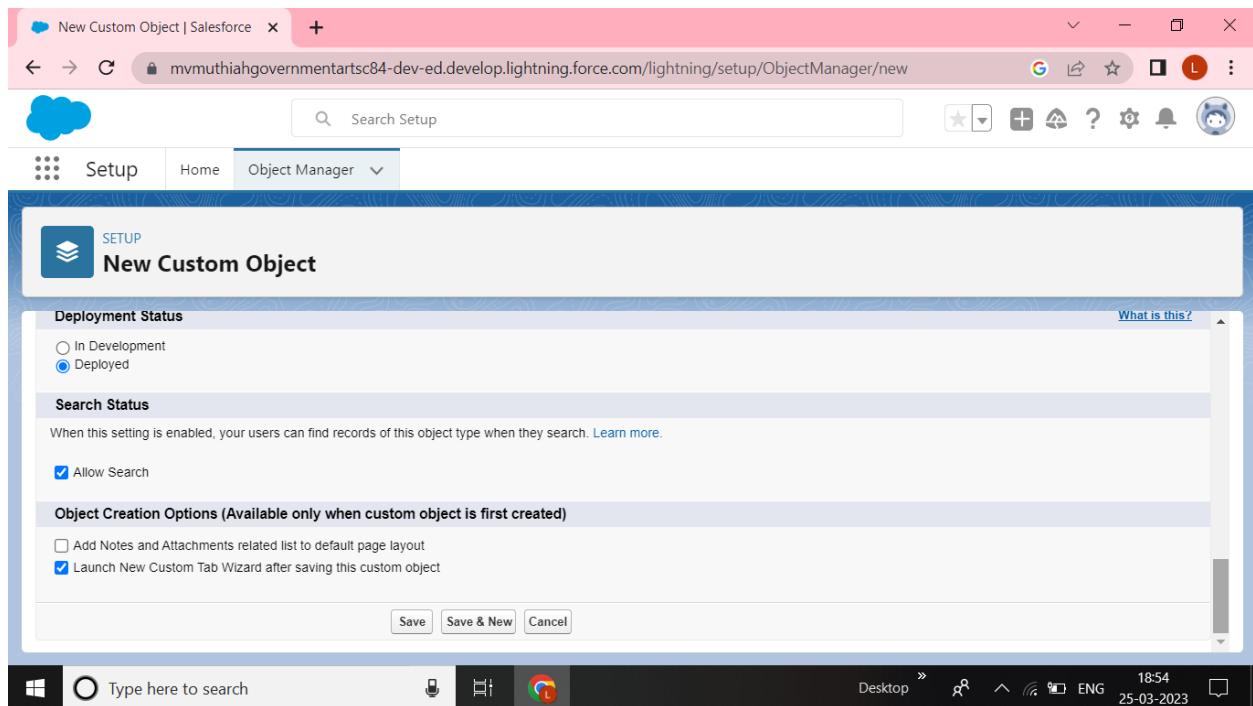
When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

Allow Search

Object Creation Options (Available only when custom object is first created)

Add Notes and Attachments related list to default page layout
 Launch New Custom Tab Wizard after saving this custom object

Save Save & New Cancel



Home | Salesforce

mvmuthiahgovernmentarts84-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fs...

Setup Home Object Manager

Tabs

Select an existing custom object or [create a new custom object now](#).

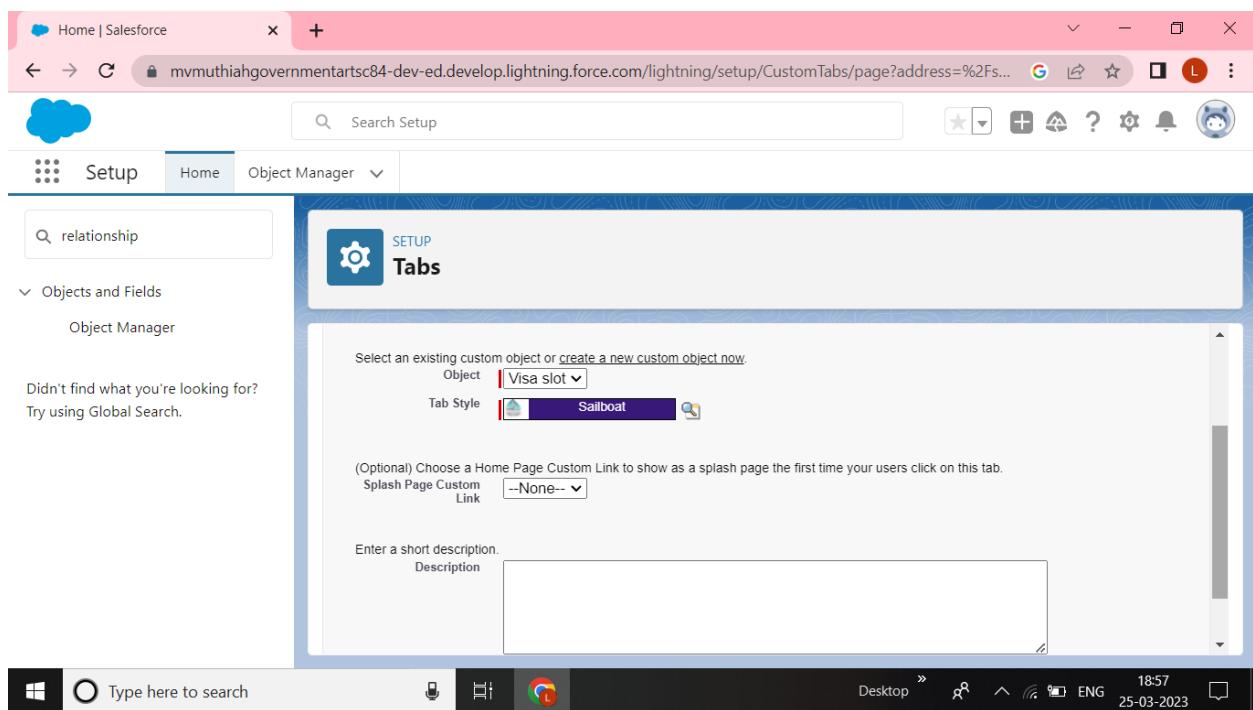
Object: Visa slot

Tab Style: Sailboat

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link: --None--

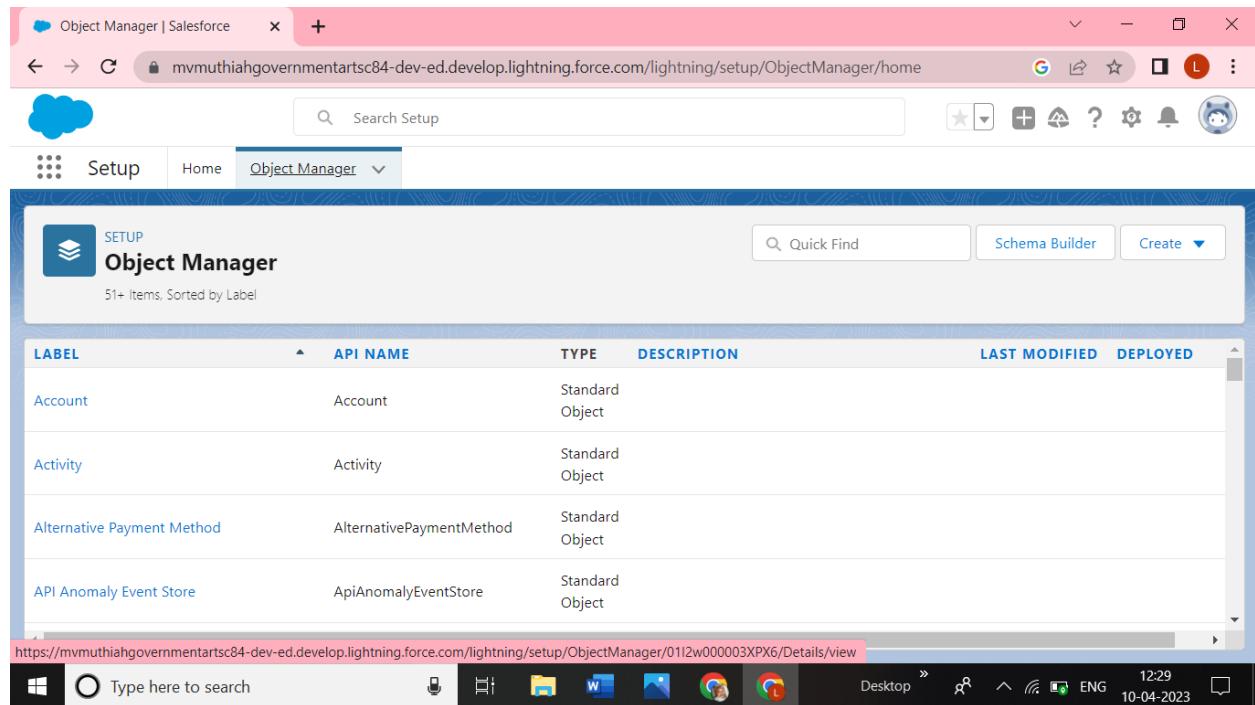
Enter a short description.

Description:



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.
- 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.



The screenshot shows the Salesforce Object Manager interface. The browser address bar displays the URL: <https://mvmuthiahgovernmentarts84-dev-ed.lightning.force.com/lightning/setup/ObjectManager/home>. The page title is "Object Manager | Salesforce". The navigation bar includes links for "Setup", "Home", and "Object Manager". The main content area is titled "Object Manager" and shows a table of standard objects. The table columns are: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The data rows are:

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 status bar at the bottom shows the URL <https://mvmuthiahgovernmentarts84-dev-ed.lightning.force.com/lightning/setup/ObjectManager/0112w000003XPX6/Details/view>, the date and time as 12:29 10-04-2023, and system icons for battery, signal, and network.

The screenshot shows the Salesforce Object Manager page. At the top, there's a navigation bar with tabs for 'Setup', 'Home', and 'Object Manager'. The 'Object Manager' tab is active. Below the navigation is a search bar with the placeholder 'Search Setup' and a search icon. To the right of the search bar are several icons: a star, a plus sign, a question mark, a gear, a bell, and a user profile. The main content area has a header 'Object Manager' with a 'SETUP' button. Below it, a message says '1 Items. Sorted by Label'. A table lists one item:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Visa slot	Visa_slot_c	Custom Object		25/03/2023	✓

At the bottom of the page, there's a Windows taskbar with icons for File Explorer, Microsoft Word, Microsoft Excel, and Microsoft PowerPoint. It also shows the date and time as '10-04-2023 12:31'.

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: A master-detail relationship defines the relationship between the parent and the 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.

Activity-1:

Creation of Relationship:

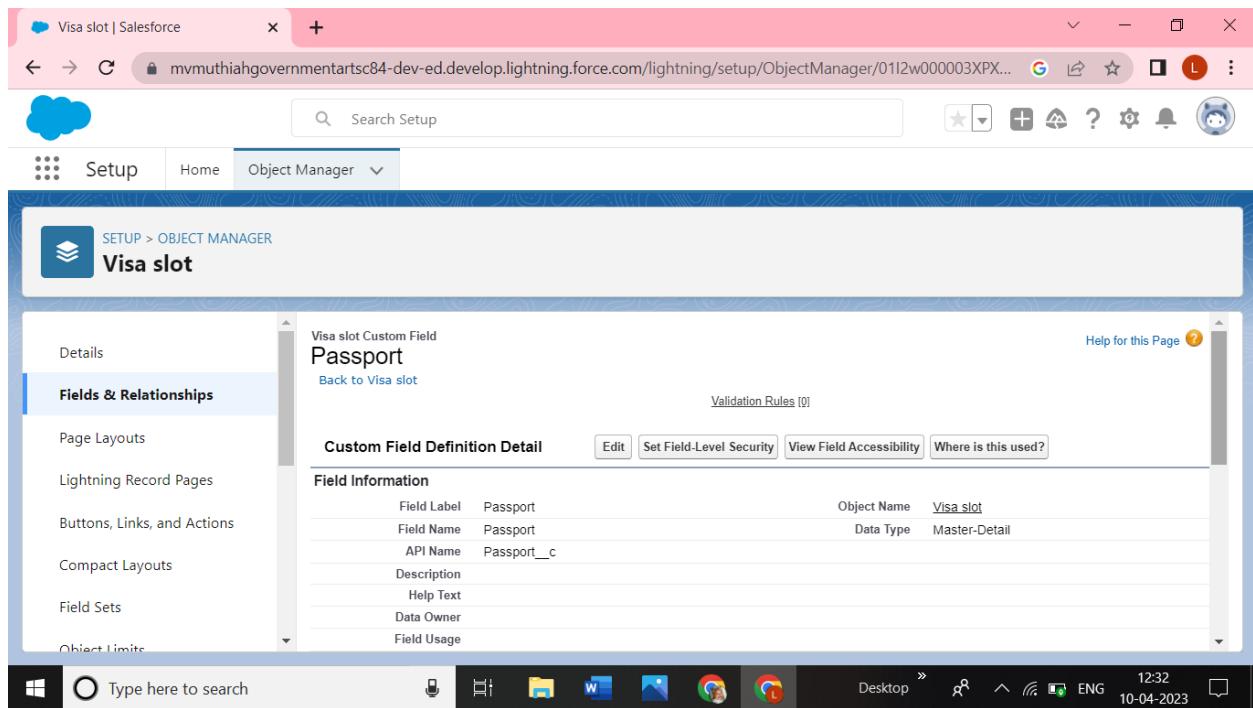
To create a Master Detail relationship between Passport and Visa.

- 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 Object Manager interface for the 'Visa slot' object. The 'Fields & Relationships' section is selected. The table displays the following data:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Passport	Passport_c	Master-Detail(Passport)	✓	▼
Visa slot Name	Name	Text(80)	✓	▼



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.

App Manager | Salesforce

mvmuthiahgovernmentarts84-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

Setup Home Object Manager

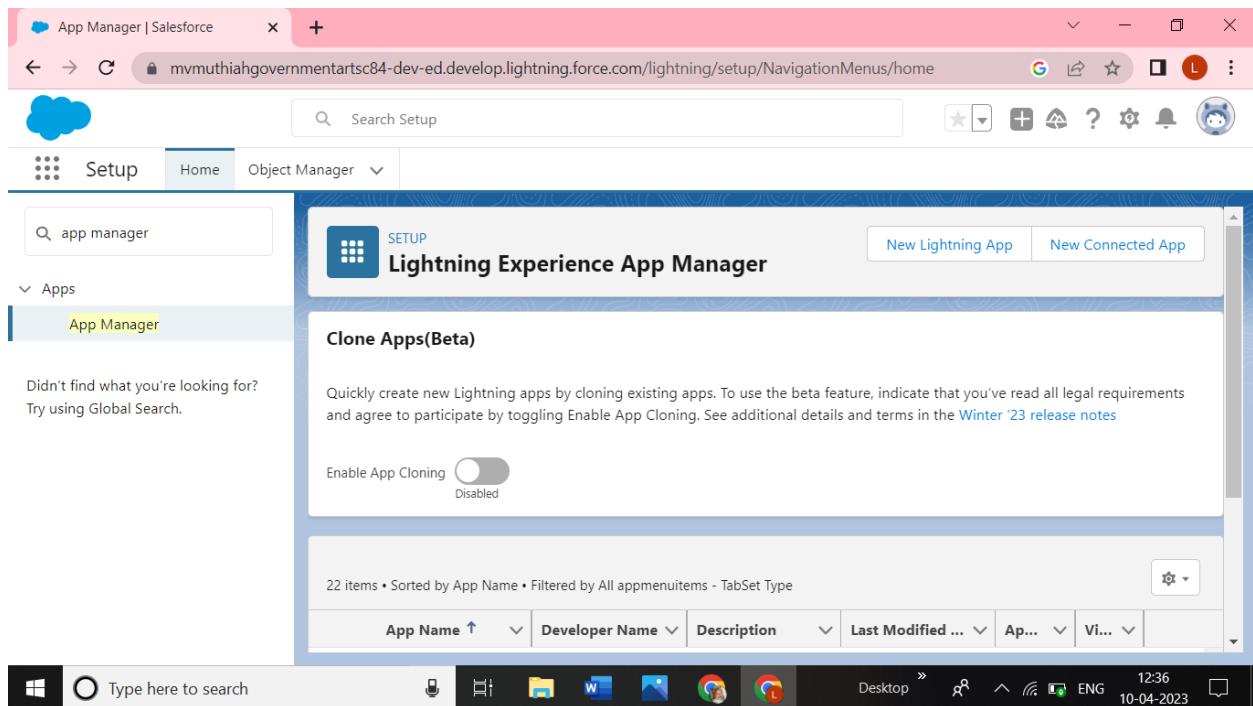
Clone Apps(Beta)

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 Name ↓ Description ↓ Last Modified ... ↓ Ap... ↓ Vi... ↓



App Manager | Salesforce

mvmuthiahgovernmentarts84-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

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

* Developer Name

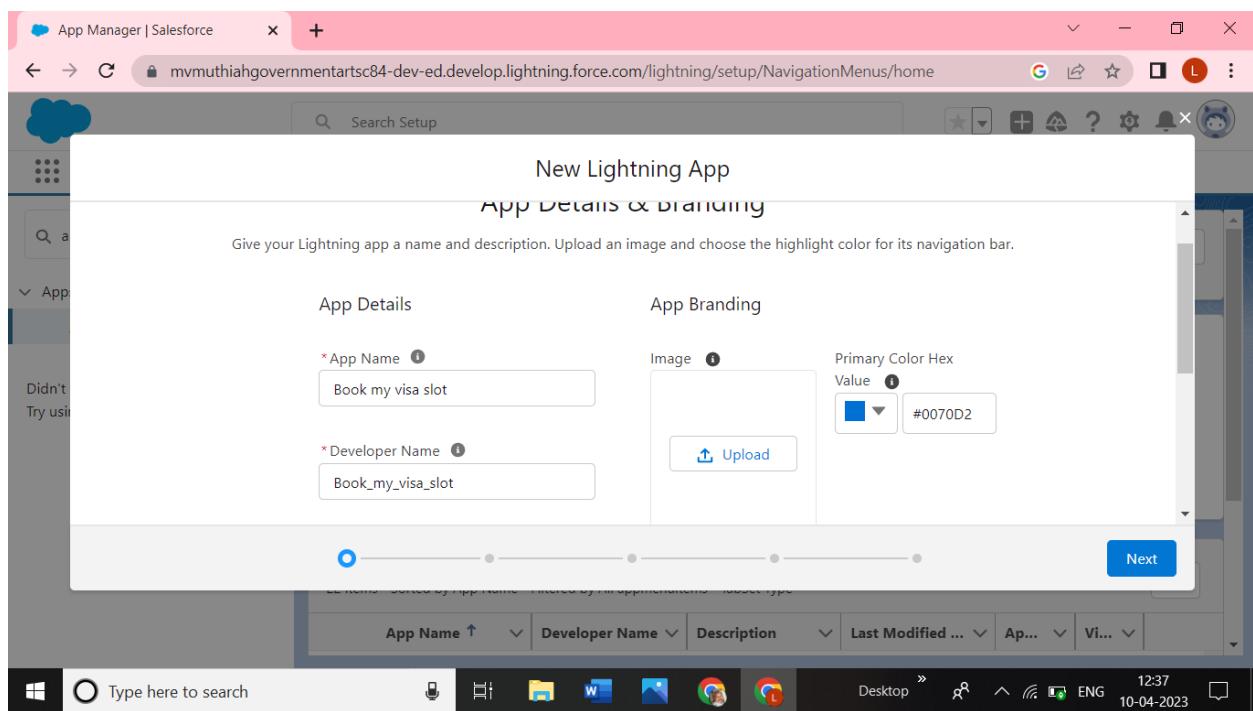
App Branding

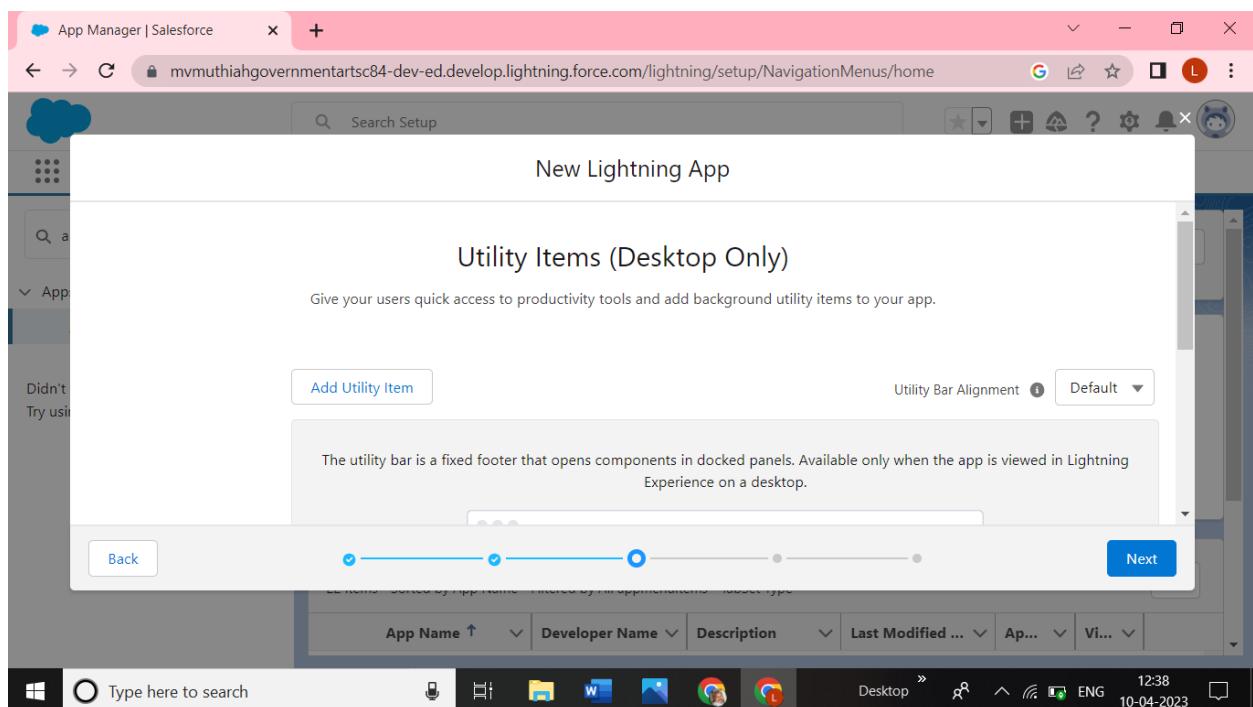
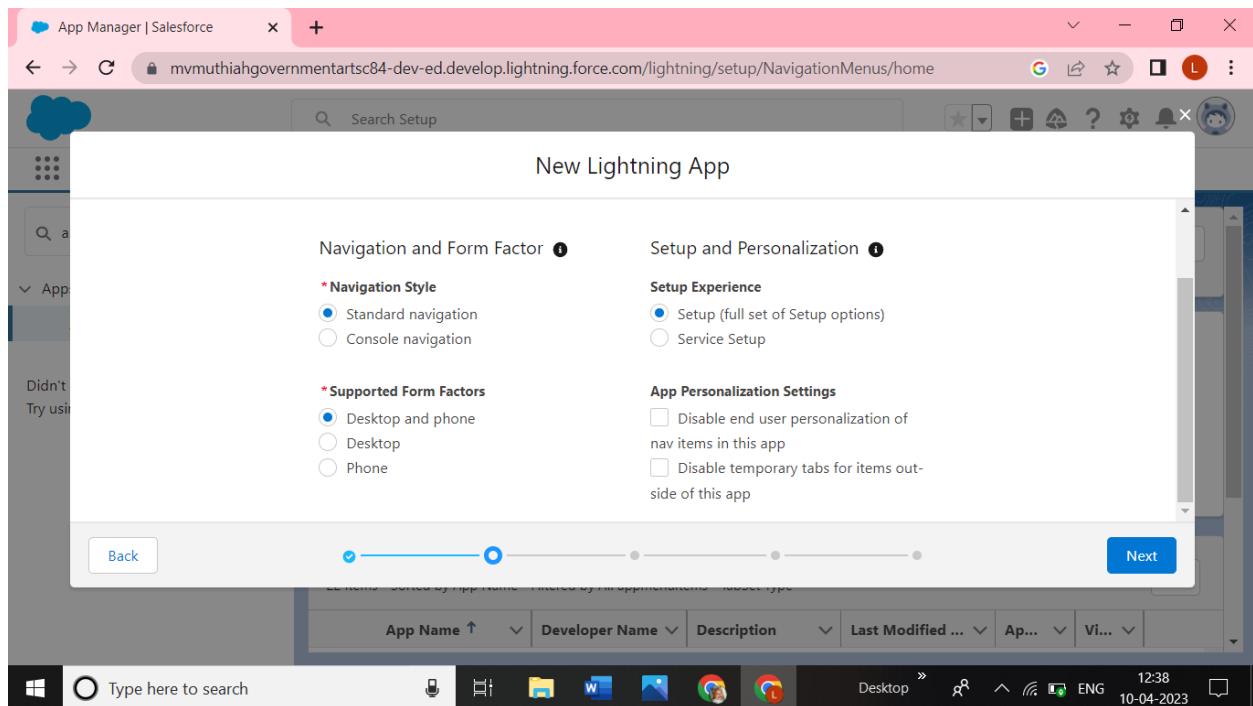
Image

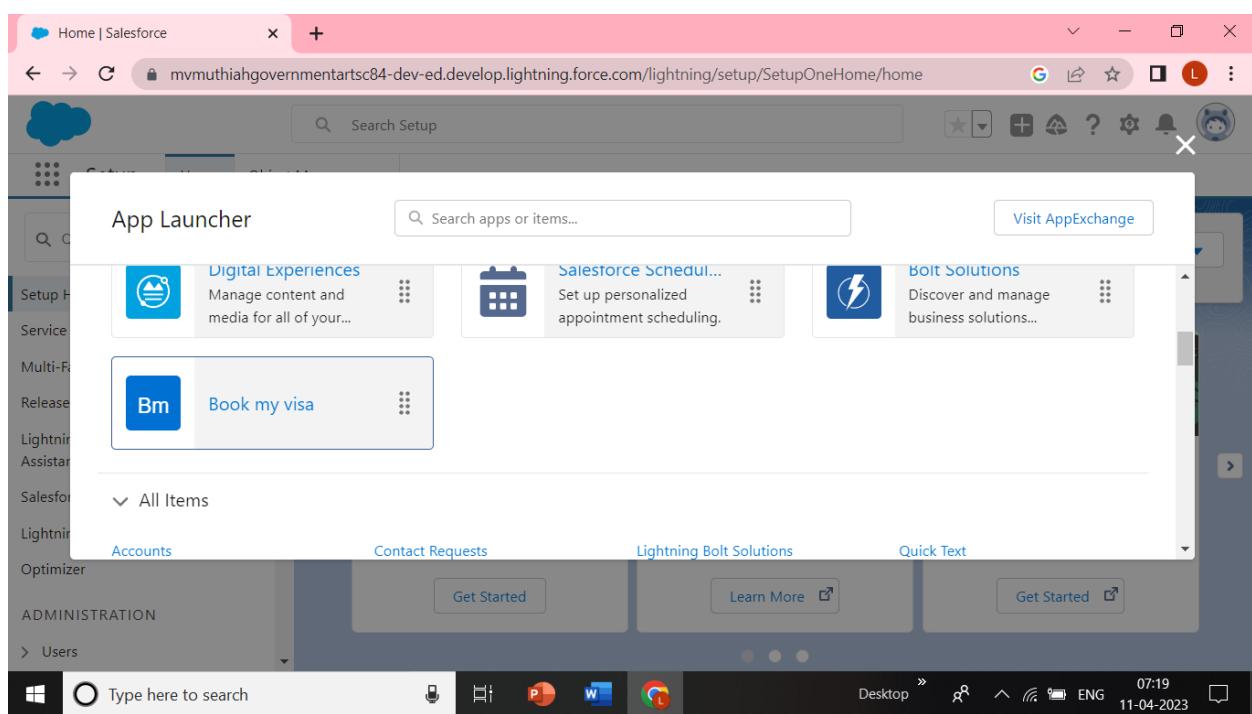
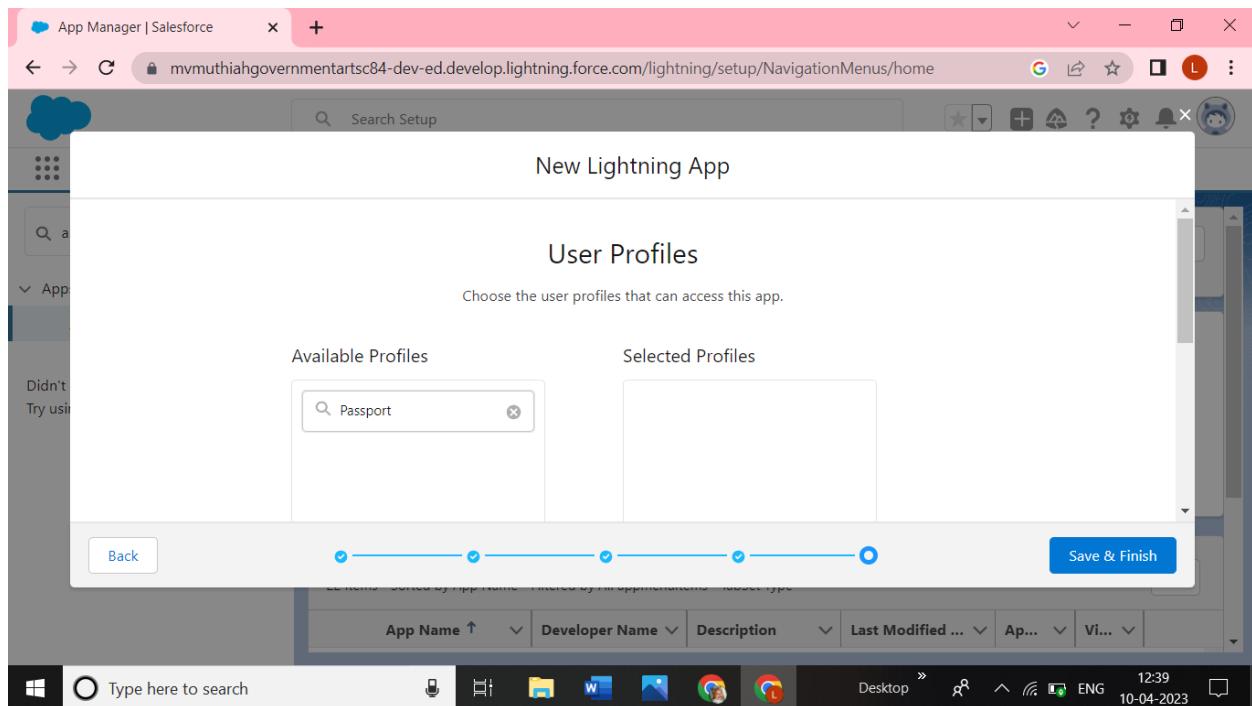
Primary Color Hex
Value

Next

App Name ↑ Developer Name ↓ Description ↓ Last Modified ... ↓ Ap... ↓ Vi... ↓







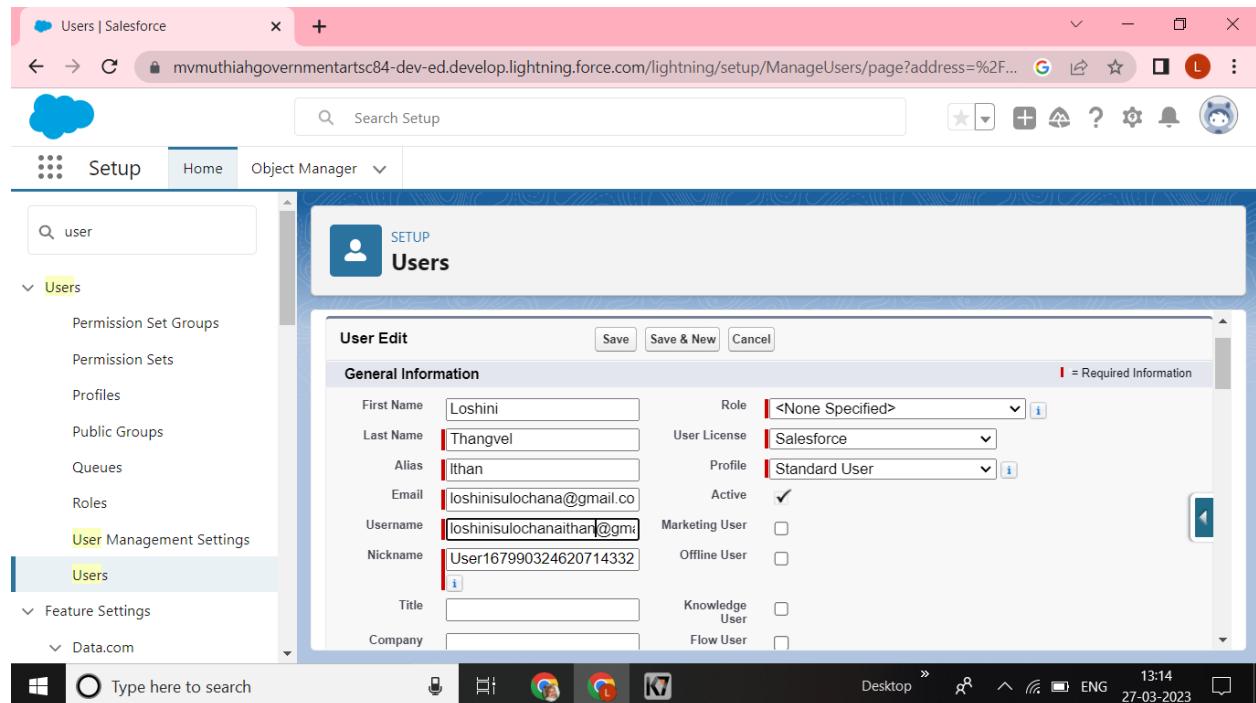
User:

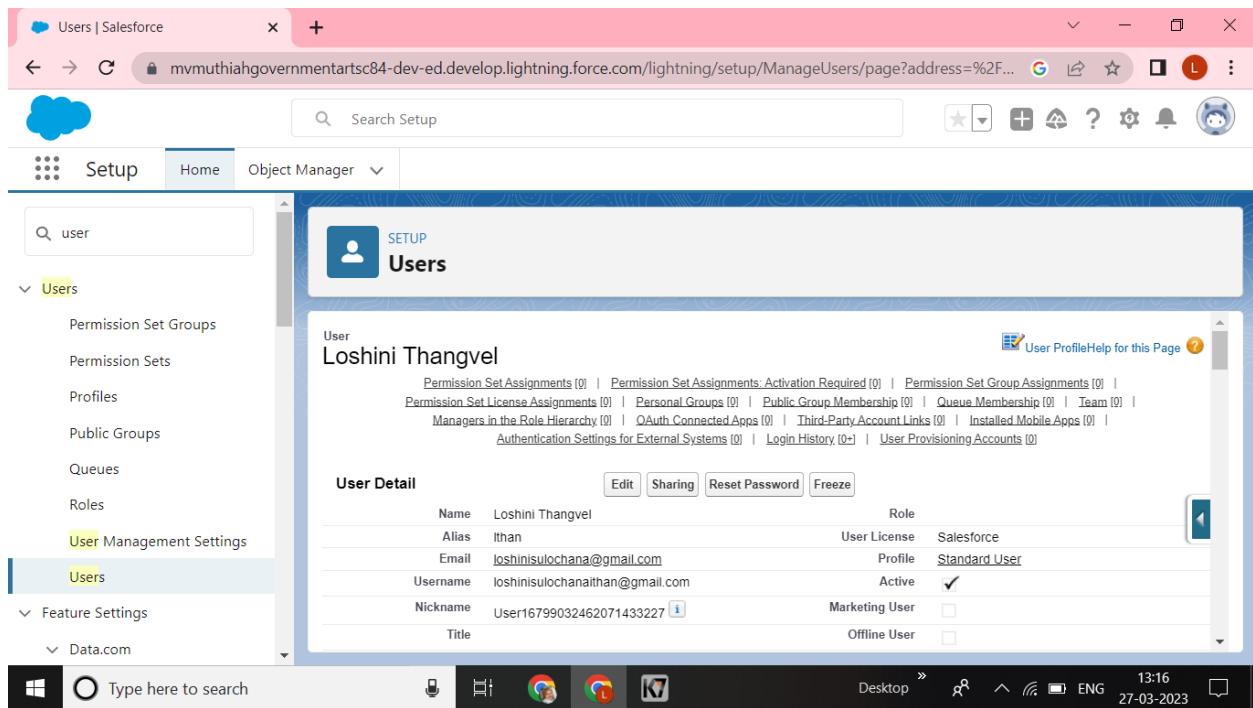
A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

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.
- 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:

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 Sharing Settings page. The URL is mvmuthiahgovernmentarts84-dev-ed.lightning.force.com/lightning/setup/SecuritySharing/page?address=%.... The page title is "Sharing Settings". The main section is titled "Organization-Wide Sharing Defaults Edit". It contains a table for setting sharing defaults for various objects:

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"/>

Buttons at the top right include "Save" and "Cancel". A "Help for this Page" link is also present.

The screenshot shows the Salesforce Sharing Settings page. The URL is mvmuthiahgovernmentarts84-dev-ed.lightning.force.com/lightning/setup/SecuritySharing/page?address=%.... The page title is "Sharing Settings". The main section is titled "Sharing Settings". It contains a table for setting sharing defaults for various fields:

Field	Internal Access	External Access	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"/>

Below the table are sections for "Other Settings" and "Secure Record Visibility". Buttons at the bottom include "Standard Report Visibility" (checked), "Manual User Record Sharing" (unchecked), "Manager Groups" (unchecked), and "Secure Record Visibility" (unchecked).

Reports:

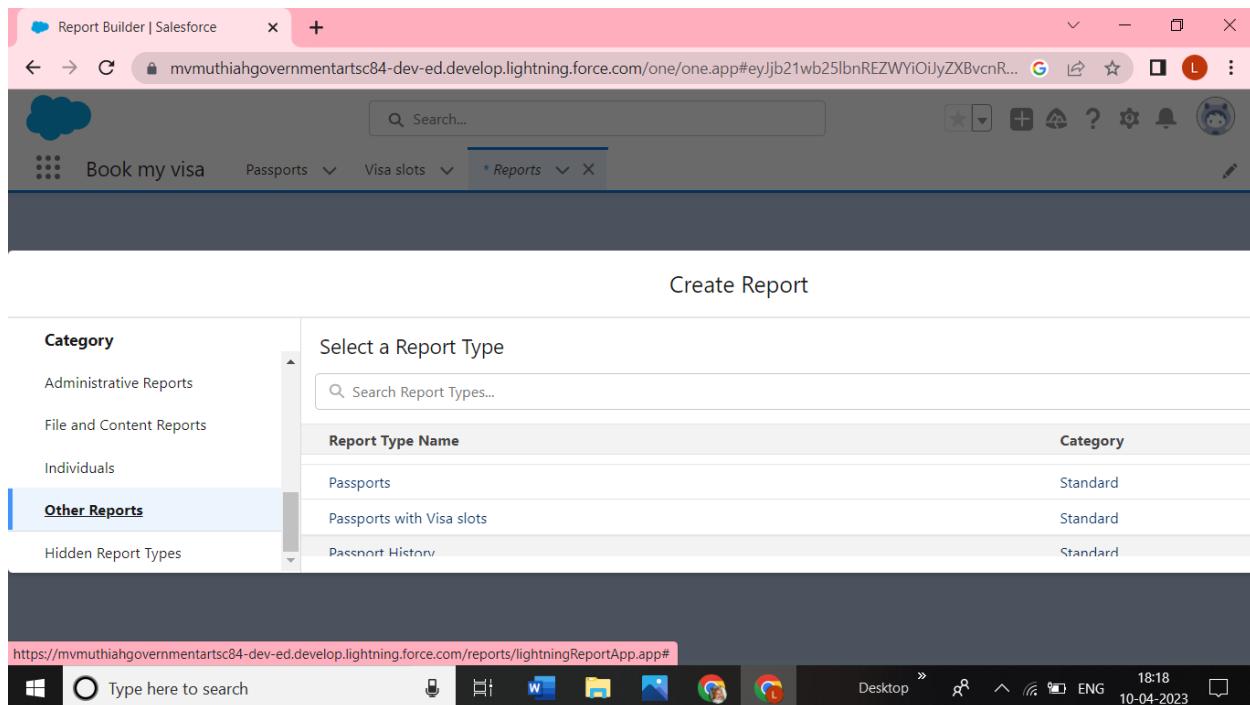
A report is a list of records that meet the criteria you define. It's displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

Activity-1:

Creation of report

Note- While creation of report ensure that update preview automatically is selected which is available at the right side of the report page.

- 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.



Report Builder | Salesforce

mvmuthiahgovernmentarts84-dev-ed.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJyZXVcnR...

Book my visa Passports Visa slots * Reports

Create Report

Category

- Administrative Reports
- File and Content Reports
- Individuals
- Other Reports**
- Hidden Report Types

Select a Report Type

Report Type Name Category

Report Type Name	Category
Passports	Standard
Passports with Visa slots	Standard
Passport History	Standard

Details

Passports Standard Rep

Start Report

Details

Type here to search

Desktop 18:18 10-04-2023

New Passport | Salesforce

mvmuthiahgovernmentarts84-dev-ed.lightning.force.com/lightning/o/Passport__c/new?count=1&nooverride...

Book my visa Passports Visa slots

New Passport

Information

* Passport Name: Thangavel

Contact Number:

Owner: Loshini T

Cancel Save & New Save

Type here to search

Desktop 14:31 10-04-2023

The screenshot shows the Salesforce Report Builder interface. At the top, there's a navigation bar with a back arrow, forward arrow, search bar, and various icons. Below the navigation is a header with tabs: 'Book my visa', 'Passports', 'Visa slots', and 'Reports'. The 'Reports' tab is active.

The main area is titled 'REPORT' and shows a report titled 'New Passports with Visa slots Report'. On the left, there's a sidebar labeled 'Fields' with sections for 'Outline' (selected), 'Groups' (with 'GROUP ROWS' and 'Add group...'), and 'Columns' (with 'Passport: Passport Name' and 'Visa slot: Visa slot Name').

The central part of the screen displays a table with four rows of data:

	Passport: Passport Name	Visa slot: Visa slot Name
1	Malarvizhi	Kaviyarasu
2	Thangavel	Sulochana
3	Murugan	Loshini
4	Jeeva	Karthikayen

At the bottom right of the report area, there are buttons for 'Add Chart', 'Save & Run', 'Save', 'Close', and 'Run'. A note says 'Previewing a limited number of records. Run the report to see everything.' and there's a toggle for 'Update Preview Automatically'.

The taskbar at the bottom of the window shows the Windows logo, a search bar with 'Type here to search', and several pinned application icons. The system tray shows the date and time as '10-04-2023 18:18'.

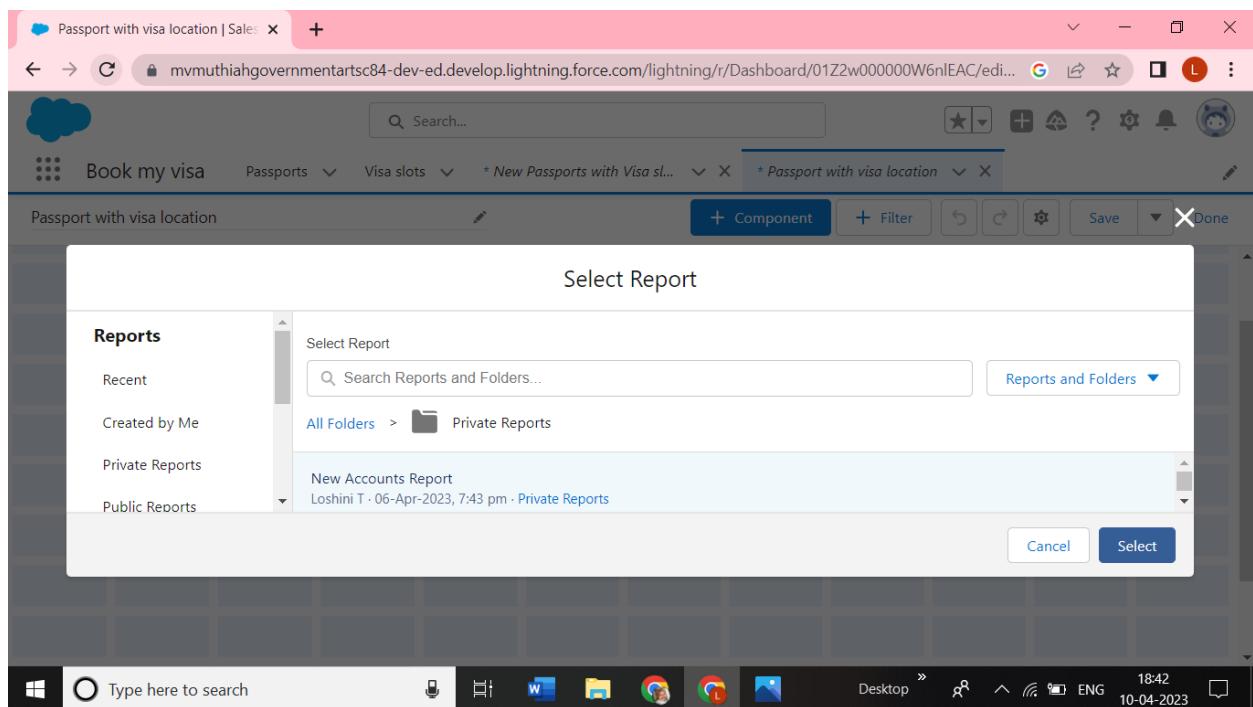
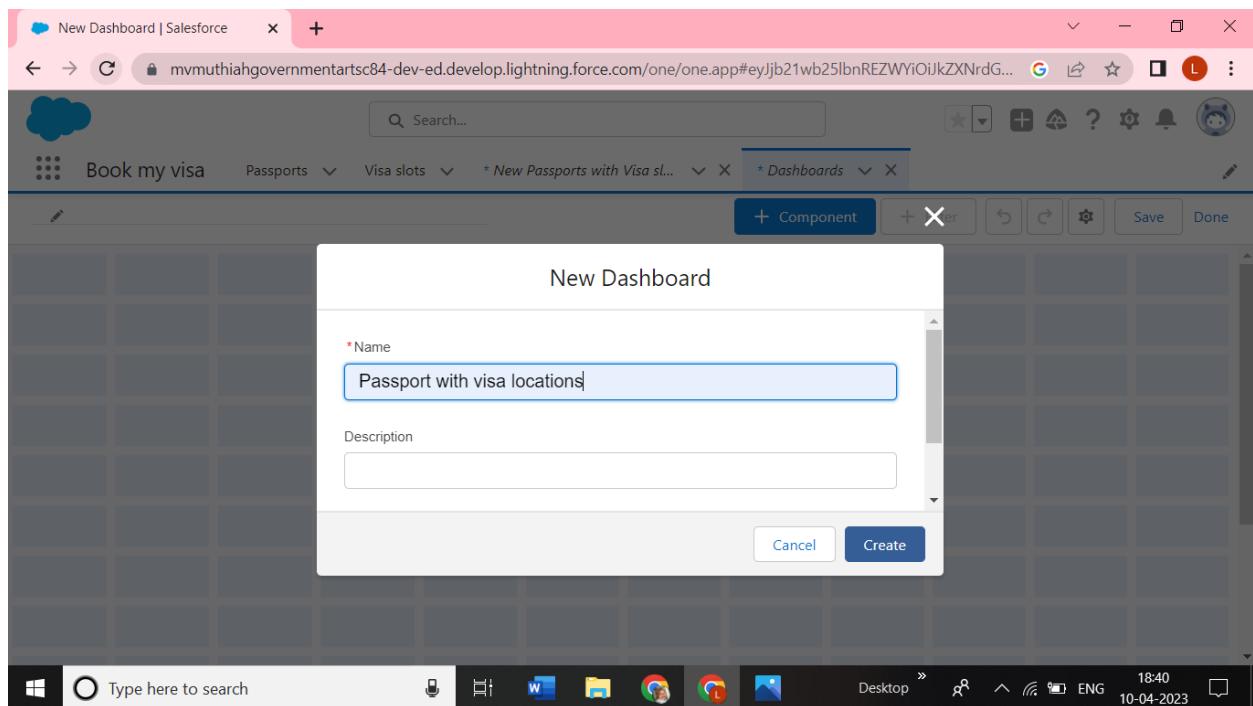
Dashboards:

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 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



Passport with visa location | Sales

mvmuthiahgovernmentarts84-dev-ed.develop.lightning.force.com/lightning/r/

Book my visa Passports Visa slots * New Passports with Visa sl... X * Passport with visa location X

Passport with visa location

Add Component

Report
New Accounts Report

Use chart settings from report

Display As

New Accounts Report

Last Name	Account Name	Account Name	Billing State	Type
Loshini T	Dickenson plc	Duramid Construction	KS	Customer
Loshini T	Grand Hotels & Resorts Ltd		IL	Customer
Loshini T	Express Logistics and Transport		OR	Customer

View Report (New Accounts Report)

Cancel Add

Save Done

This screenshot shows the Salesforce Lightning interface. A modal window titled 'Add Component' is open, displaying a 'New Accounts Report' component. The report preview shows four rows of account data: Loshini T, Dickenson plc, Duramid Construction (Billing State KS, Type Customer); Loshini T, Grand Hotels & Resorts Ltd (Billing State IL, Type Customer); and Loshini T, Express Logistics and Transport (Billing State OR, Type Customer). The background shows a dashboard with various components and a navigation bar at the top.

Passport with visa location | Sales

mvmuthiahgovernmentarts84-dev-ed.develop.lightning.force.com/lightning/r/

Book my visa Passports Visa slots * New Passports with Visa sl... X * Passport with visa location X

Passport with visa location

Dashboard saved

New Accounts Report

Last Name	Account Name	Account Name	Billing State	Type
Loshini T	Pyramid Construction Inc.		-	Customer
Loshini T	Dickenson plc	KS	Customer	
Loshini T	Grand Hotels & Resorts Ltd	IL	Customer	
Loshini T	Express Logistics and Transport	OR	Customer	

View Report (New Accounts Report)

This screenshot shows the Salesforce Lightning interface after the 'New Accounts Report' component was added. A green success message 'Dashboard saved' is displayed at the top. The 'New Accounts Report' component now displays four rows of account data: Loshini T, Pyramid Construction Inc. (Billing State -, Type Customer); Loshini T, Dickenson plc (Billing State KS, Type Customer); Loshini T, Grand Hotels & Resorts Ltd (Billing State IL, Type Customer); and Loshini T, Express Logistics and Transport (Billing State OR, Type Customer). The background shows a dashboard with various components and a navigation bar at the top.

The screenshot shows a web browser window with a pink header bar. The address bar displays the URL: mvmuthiahgovernmentarts84-dev-ed.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru. The main content area is a Salesforce Lightning interface. At the top, there are navigation links: 'Book my visa', 'Passports', 'Visa slots', and a dropdown menu for 'Dashboards'. Below this is a search bar with placeholder text 'Search...'. To the right of the search bar are several icons: a star, a plus sign, a question mark, a gear, a bell, and a user profile. A blue cloud icon is visible on the left. The main area shows a table titled 'Dashboards' with a single item: 'Recent'. The table has columns: 'Dashboard Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. The item listed is 'Passport with visa location' from the 'Private Dashboards' folder, created by 'Loshini T' on '6/4/2023, 7:47 pm'. On the left side, there are filters for 'DASHBOARDS' (Recent, Created by Me, Private Dashboards, All Dashboards) and 'FOLDERS' (All Folders, Created by Me, Shared with Me). The bottom of the screen shows a Windows taskbar with icons for File Explorer, Microsoft Edge, Word, and Excel. The system tray shows the date as '11-04-2023' and the time as '07:45'. The language is set to 'ENG'.

TRAILHEAD PROFILE PUBLIC URL

TEAM LEAD – T. LOSHINI - <https://trailblazer.me/id/etloshinimaths>

TEAM MEMBER 1 - D. LOGAPRIYA

TEAM MEMBER 2 – S. MARCELINE SELASTINA

TEAM MEMBER 3 – M. POOVIZHI

ADVANTAGES & DISADVANTAGE

ADVANTAGES:

- Beneficial for different department or teams of the business.
- Customers are engaged across multiple channel.
- Improve Customer Service.
- Data Mining
- Helps in increasing sales.
- Improve decision making and productivity.

DISADVANTAGES:

- A Costly project

- Loss of collected information or records.
- Not suitable for every business.
- It eliminates the human element.
- Have poor usability.
- Having lots of security concerns.

APPLICATIONS

A good CRM makes it easy for salesforce to track records of their activities, share information internally, and keep in touch with their customers.

For managers and owners, CRM can help refine the overall sales process, gather important customer data, and analyze the sales trends and metrics that will lead to more informed investment, marketing and operating decisions.

Before businesses get interested in CRM, they usually manage customer relations on spreadsheets, in email chains, and sometimes in a generic shared drive system.

This works for a while. But as the sales team grows, it becomes clear that each person on the team has a different method of interacting with customers, closing deals, and tracking communications. With information tracked across different documents and in different ways things start to get complicated.

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.

FUTURE SCOPE

These days, numerous small and medium sized enterprises are arising across the world. Unlike large organizations, they are reluctant to implement CRM software. However, the preferences and requirements might change with time. There was a time when CRM used to be mean for expensive infrastructure and complex technicalities. These, in turn, increased the expense of the CRM software and made it unaffordable for companies which have a small investment.

Hence, they were bound to hire designated technicians. These technicians used to charge a lump sum amount in exchange for their services. As a result, the cost used to be the most discouraging factor for small and medium enterprises.

