

# **CRM Application That helps to Book a Visa Slot**

## **INTRODUCTION**

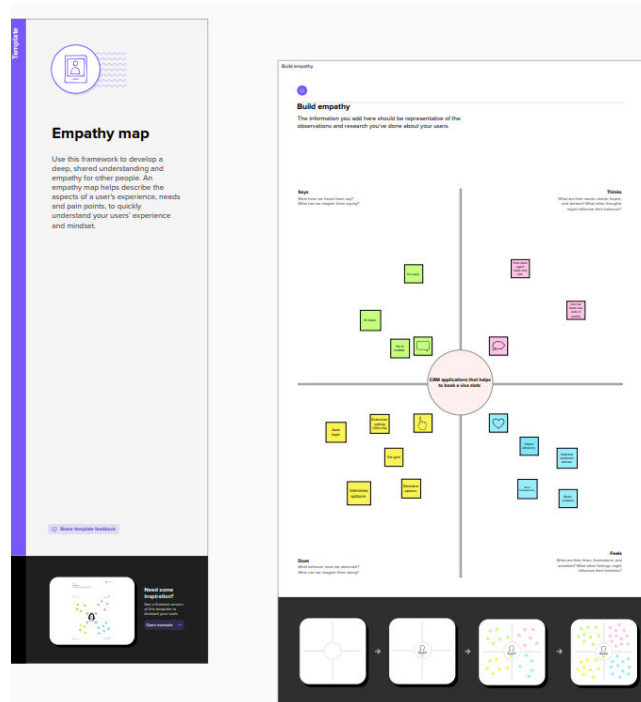
### **1.1 Overview**

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.

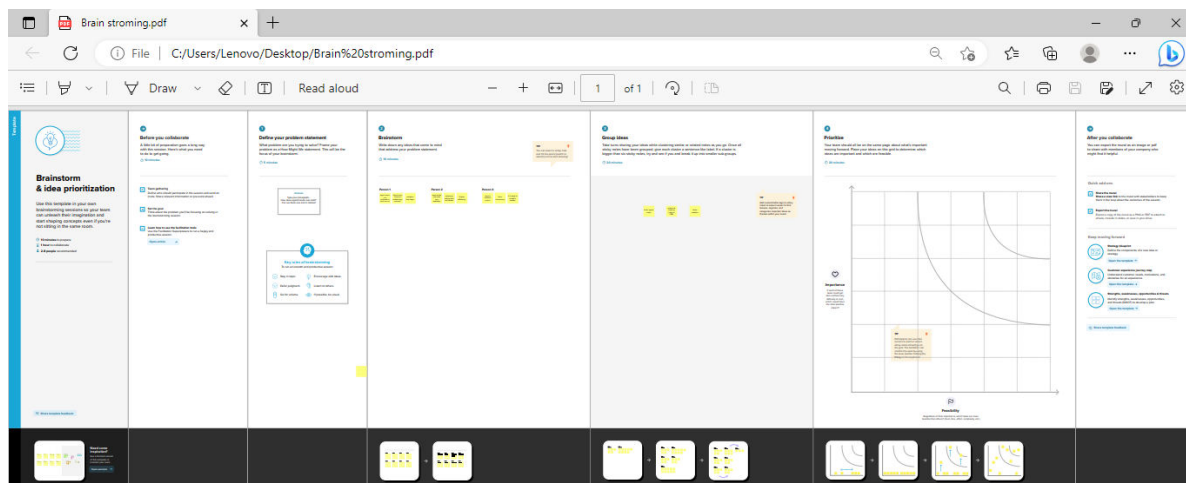
### **1.2 Purpose**

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

## 2.1 Empathy Map



## 2.1 Ideation & Brainstorming Map



## RESULT

### 3.1 Data Model:

Object Name	Fields in the object	
Passport		
	Field label	Data Type
	Created by	Look up (user)
	Last Modified By	Look up (user)
	Owner	Look up (user,Group)
	Passport Name	Text (80)
Visa slot Name		
	B1412KS2	Master-Detail(Passport)
	Created by	Look up (user)
	Last Modified By	Look up (user)
	Visa slot Name	Text(80)

### 3.1 Activity & Screenshot

#### Activity 1:

Creating Developer Account Creating a developer org in salesforce.

1. Go to [developers.salesforce.com/](https://developers.salesforce.com/)
2. Click on sign up.
3. On the sign up form, enter the following details :

- First name & Last name
- Email
- Role : Developer
- Company : College Name
- County : India
- Postal Code : pin code
- Username : should be a combination of your name and company This need not be an actual email id, you can give anything in the format :  
username@organization.com

Click on sign up after filling these.

Developer Edition Sign-up | Salesforce

Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with slides
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

A full-featured copy of the Platform, for free.

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name\*  
Your first name

Last Name\*  
Your last name

Email\*  
Your email address

Role\*  
Your job role

Company\*  
Company Name

Country/Region\*  
Select Country/Region

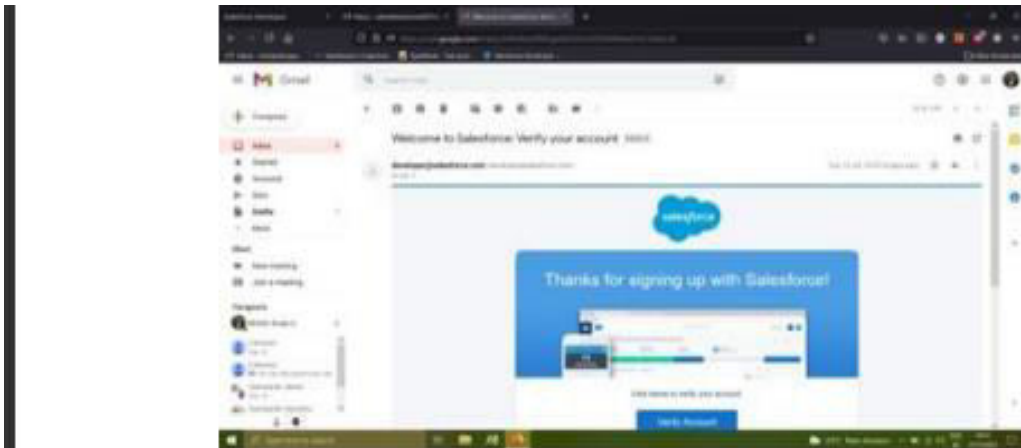
Postal Code\*  
Your postal code

Sign Up

## 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

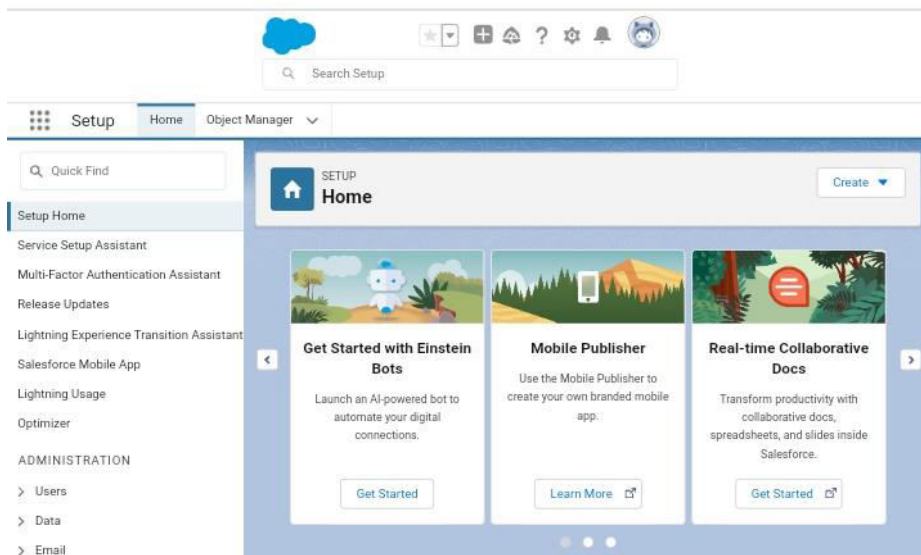


## Login To Your Salesforce Account

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

## Salesforce Login

<https://login.salesforce.com>



## Milestone-2: 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.

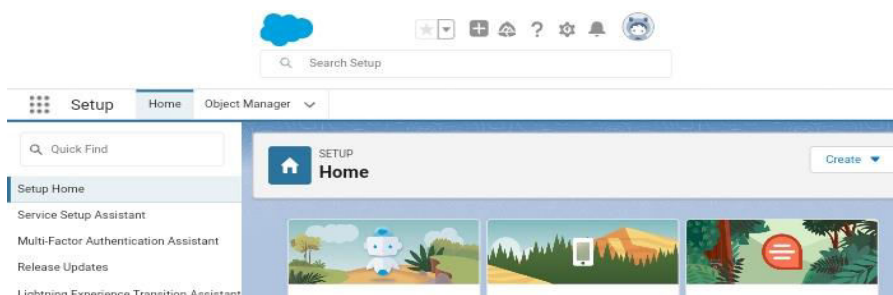
Objects involved in Book my visa are:

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

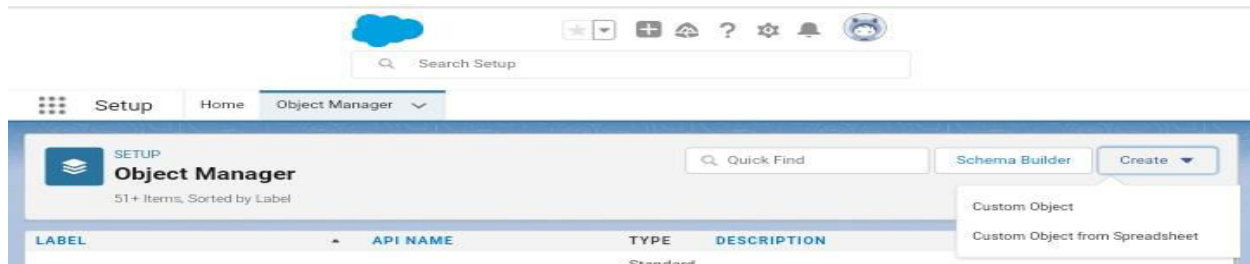
## Activity-1:

### 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.

The screenshot shows the 'New Custom Object' page in Salesforce Setup. The page has a title 'New Custom Object' and a subtitle 'New Custom Object Definition Edit'. There are three buttons: 'Save', 'Save & New', and 'Cancel'. A message bar at the top states: 'Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Link]'. The 'Custom Object Information' section includes fields for 'Label' (Passport), 'Plural Label' (Passports), 'Starts with vowel sound' (checkbox), 'Object Name' (Passport), and 'Description'. The 'Enter Record Name Label and Format' section includes a 'Record Name' field (Passport) and a 'Data Type' dropdown (Text). The 'Optional Features' section includes checkboxes for 'Allow Reports', 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Licensing'.

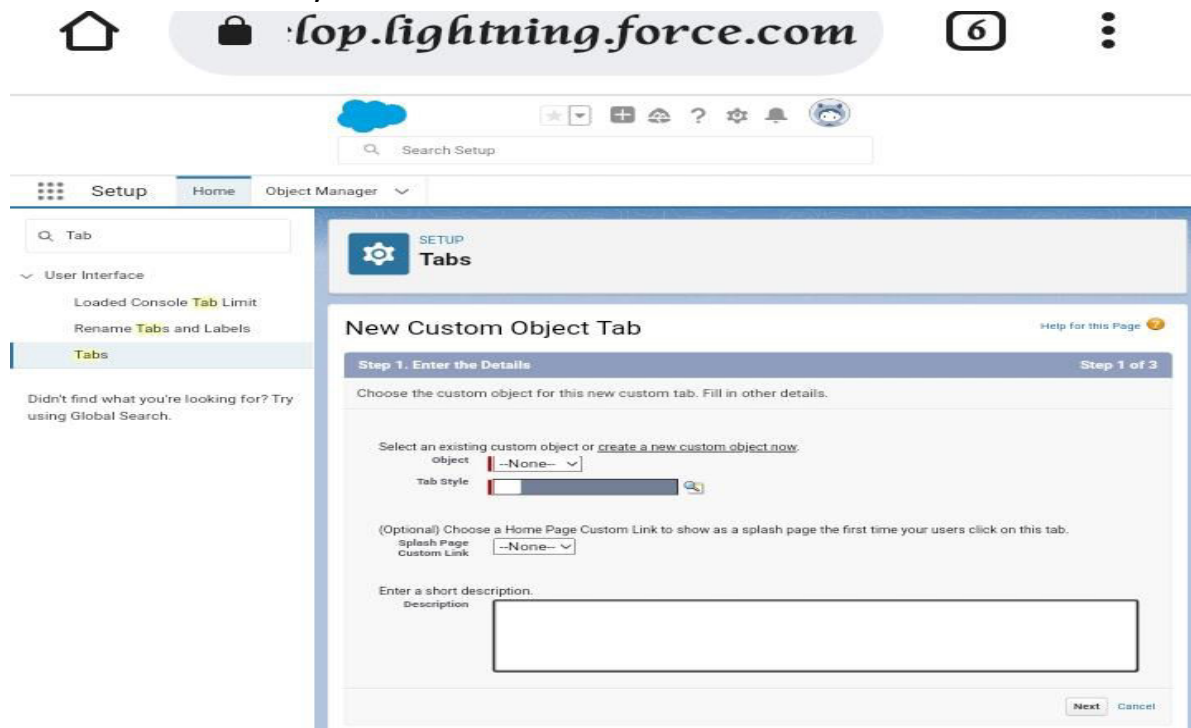
5) In enter record name label and format enter name record name has passport number.

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	Data Type
1) Contact Number	Number
2) Full Name	Text

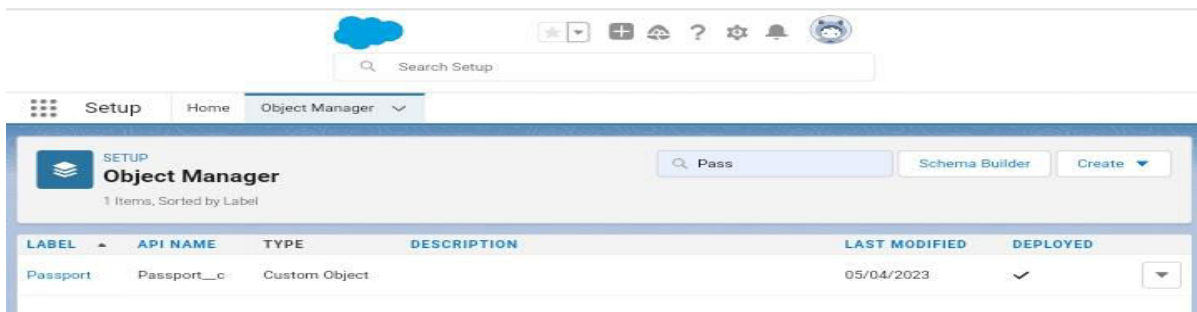


3) Passport Number                      Text

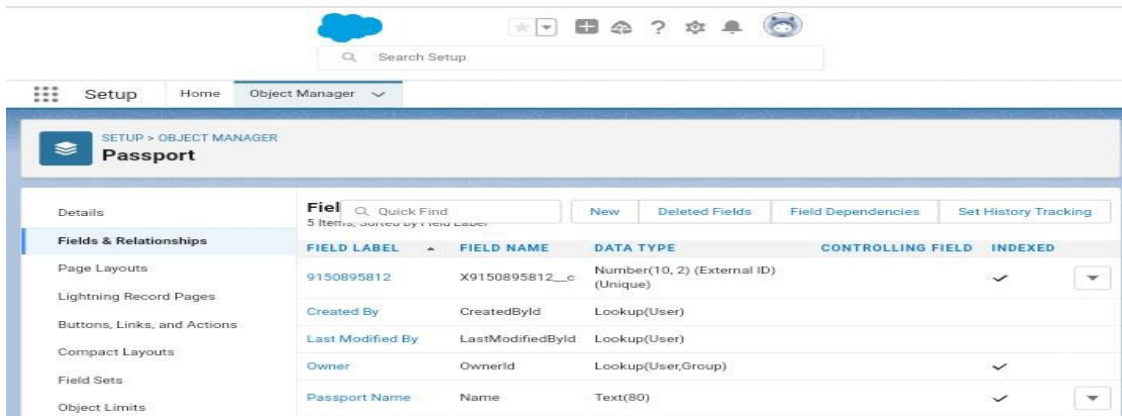
4) Permanent Address                      Text

## Creation of fields on custom Object: Passport

1) Select your object from object selection has passport.



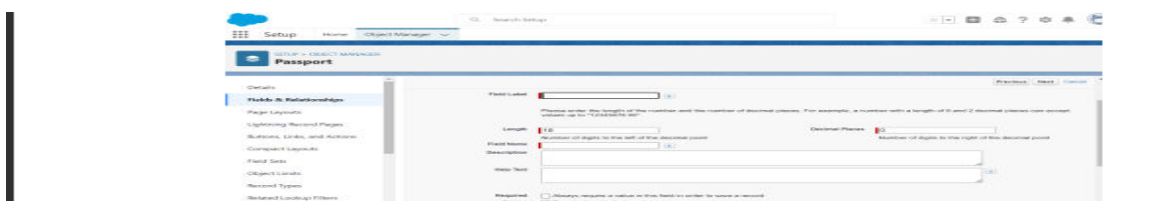
c 2) And select the option fields and relationships.



3) At the top right side you can find a new select that option.

4) Now you have to select data type, select number has data type.

5) And you will navigate to enter the details page where you give the field label.



6) And give the label name has Contact number.

7) And length should be 10 at the bottom of the object you can find options like required, unique, external id select required option so that always require a value in this field in order to save.

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

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

### **Milestone-3: Relationship B/w Objects:**

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.

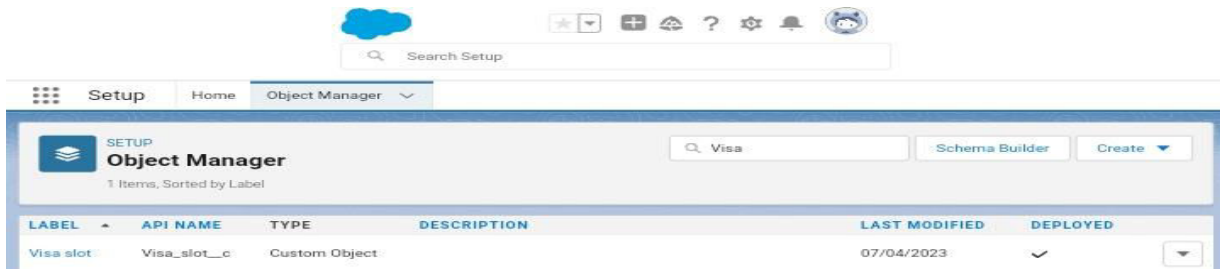
3) Many to many relationship: Records of a particular object can connect with various records of different objects and vice versa

### **Activity-1:**

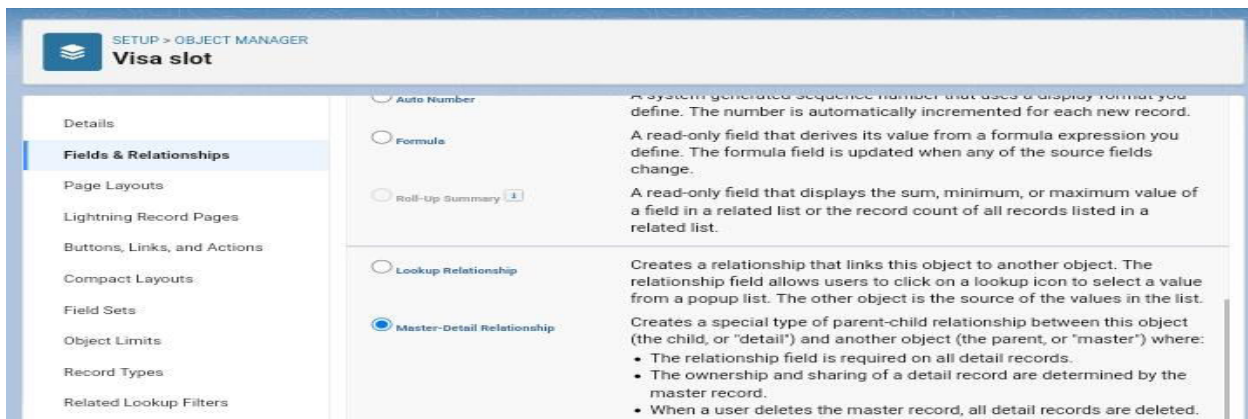
#### **Creation of Relationship:**

To create a Master Detail relationship between Passport and Visa.

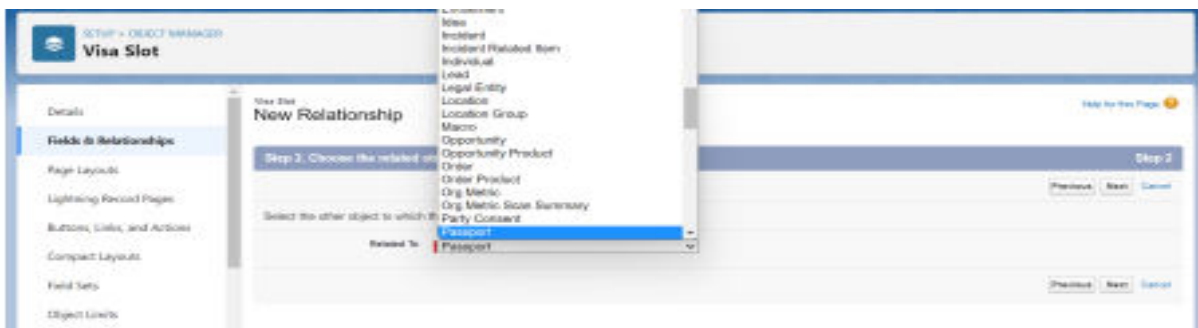
- 1) Go to the Set Up option from the Home Page and click on it.
- 2) Go to the object manager and select 'visa' object from the list.



- 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.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area is titled 'Edit Visa slot Custom Field 1758AB05'. It contains a 'Custom Field Definition Edit' form with fields for 'Field Label' (1758AB05), 'Field Name' (X1758AB05), 'Description', and 'Help Text'. The 'Data Type' is set to 'Master-Detail'. The 'Data Owner' is set to 'User'.

7) Select visible for all profiles in field level security and select page layout in next page and save it.

## Milestone-4 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:

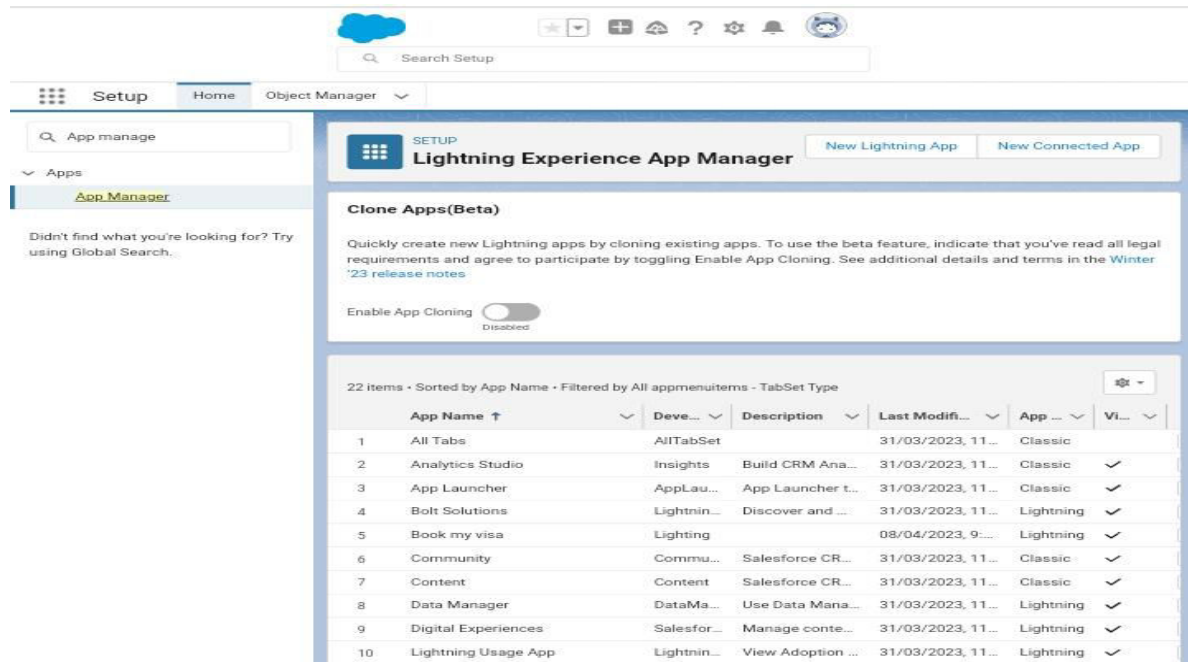
- 1) Standard App
- 2) Custom Apps

## Activity:

### Creation of App

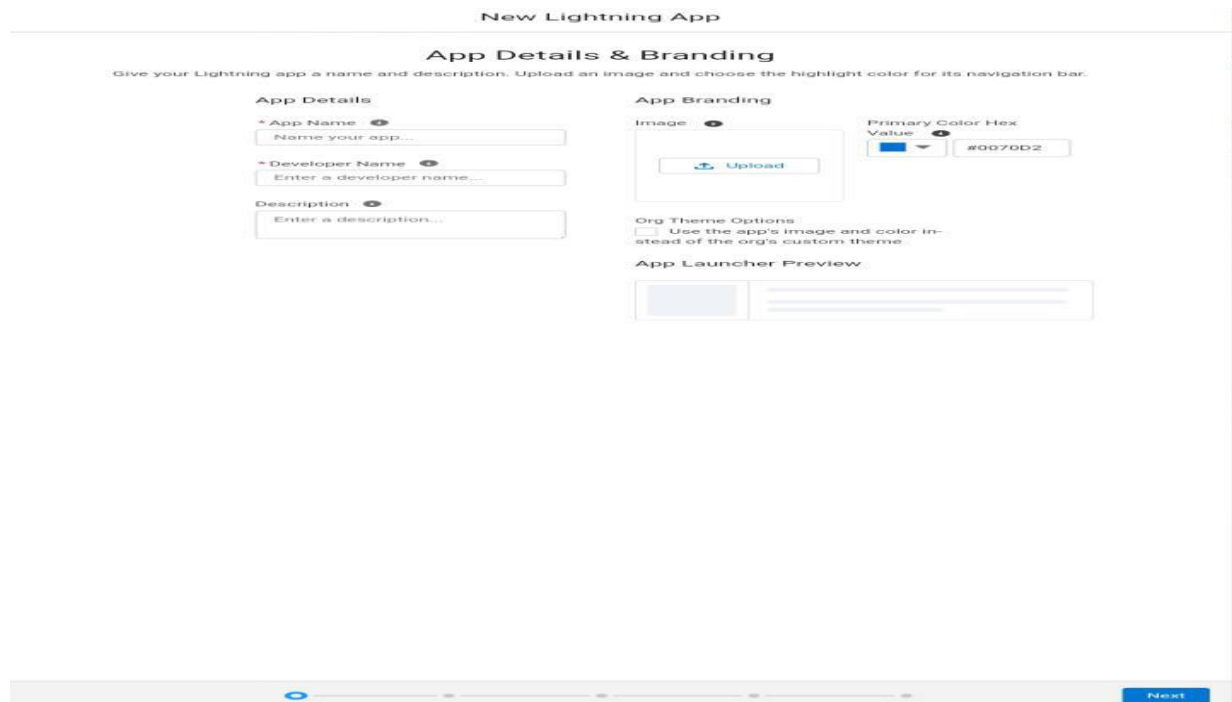
An app is a collection of items that work together to serve a particular function. Salesforce apps come in two flavors: Classic and Lightning.

## 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.

New Lightning App

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### Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

**Available Items**  **Create** 

Type to filter list...

Accounts

Alert Settings

All Sites

Alternative Payment ...

App Launcher



Appointment Invitations

Approval Requests

Asset Action Sources



Asset Actions

Asset State Periods

Selected Items

No items selected

Back

Next

8) And system admin profile to available items to selected items.



## Milestone-5 User:

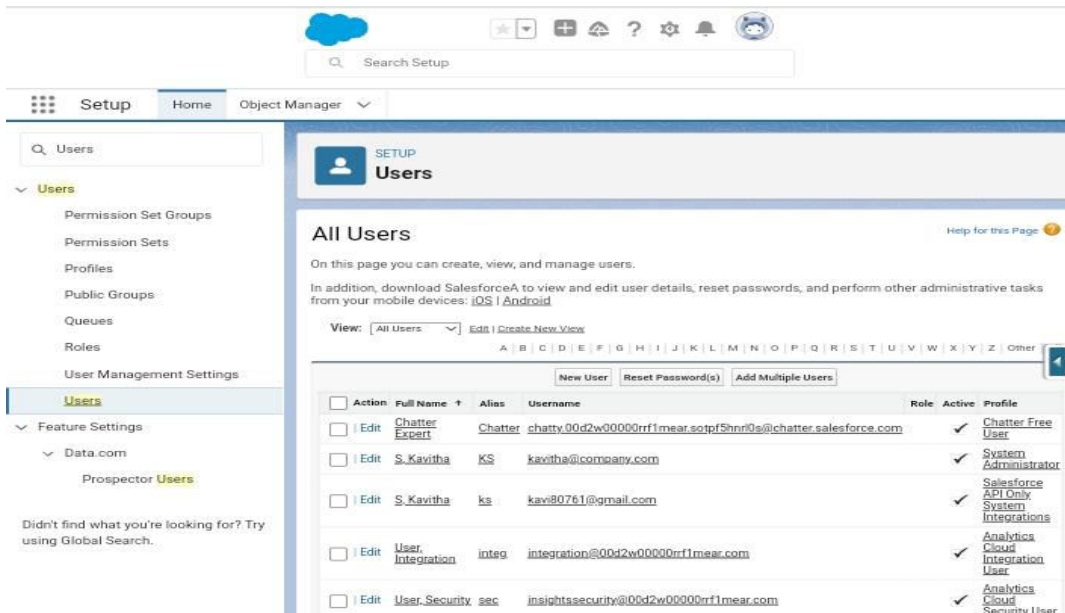
A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

## 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.



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "Users" entered. The main content area is titled "All Users" and includes a table of existing users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The first user is "Chatter Expert" with username "chatty00d2w00000rff1mear.sotp1Shnr0s@chatter.salesforce.com". The second user is "S. Kavitha" with username "kavitha@company.com". The third user is "S. Kavitha" with username "kavi80761@gmail.com". The fourth user is "User Integration" with username "integration@00d2w00000rff1mear.com". The fifth user is "User Security sec" with username "insightssecurity@00d2w00000rff1mear.com".

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty00d2w00000rff1mear.sotp1Shnr0s@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	S. Kavitha	KS	kavitha@company.com		✓	System Administrator
<input type="checkbox"/> Edit	S. Kavitha	ks	kavi80761@gmail.com		✓	Salesforce API Only System Integrations
<input type="checkbox"/> Edit	User Integration	integ	integration@00d2w00000rff1mear.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security sec		insightssecurity@00d2w00000rff1mear.com		✓	Analytics Cloud Security User

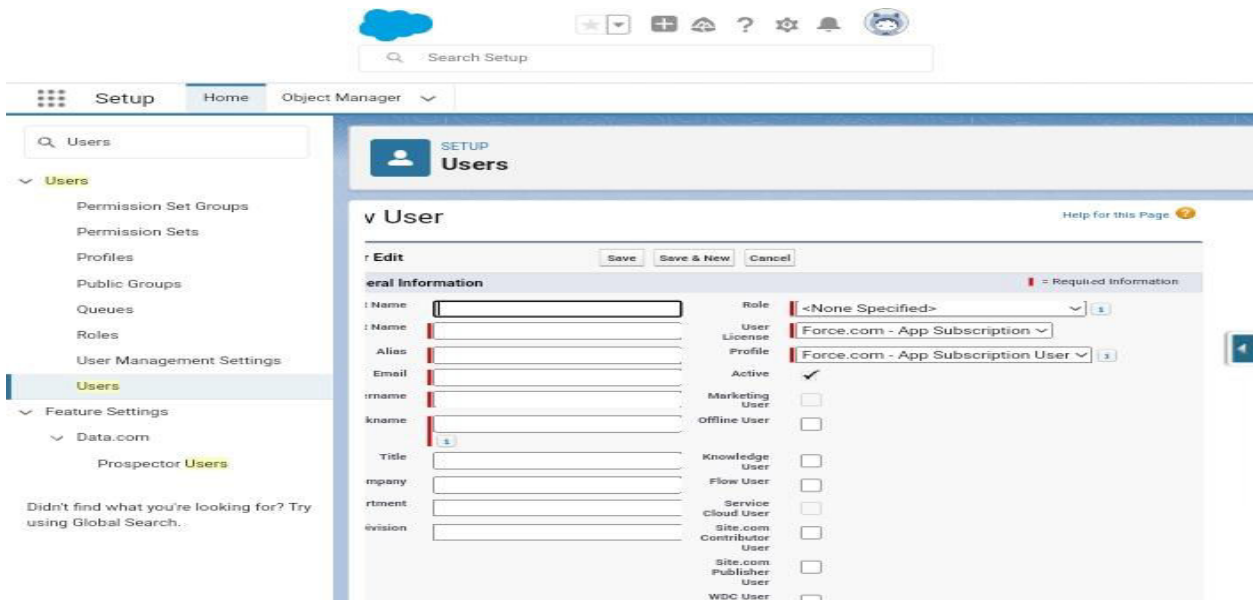
3) Give the first name and last name.

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.



The screenshot shows the Salesforce Setup interface for editing a user. The left sidebar has a search bar with "Users" entered. The main content area is titled "v User" and includes a form for editing user information. The form has fields for Name, Alias, Email, Username, Title, Company, Department, Division, Role, User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User. The Role field is set to "<None Specified>". The User License field is set to "Force.com - App Subscription". The Profile field is set to "Force.com - App Subscription User".

General Information	
Name	
Alias	
Email	
Username	
Title	
Company	
Department	
Division	
Role	<None Specified>
User License	Force.com - App Subscription
Profile	Force.com - App Subscription User
Active	✓
Marketing User	
Offline User	
Knowledge User	
Flow User	
Service Cloud User	
Site.com Contributor User	
Site.com Publisher User	
WDC 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

Search Setup

Setup Home Object Manager

Shar

Security

Sharing Settings

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

SETUP Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: All Objects

Disable External Sharing Model

Default Sharing Settings

Organization-Wide Defaults Edit Organization-Wide Defaults Help

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓

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

Engagement Channel Type	Private	Private	✓
Finance Balance Snapshot	Private	Private	✓
Finance Transaction	Private	Private	✓
Flow Interview	Private	Private	✓
Flow Interview Log	Private	Private	✓

## Milestone-6 Reports:

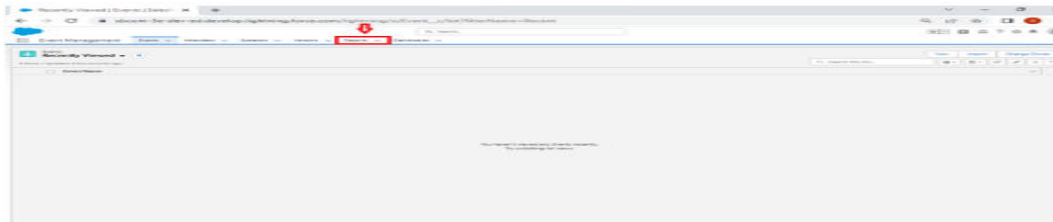
A report is a list of records that meet the criteria you define. It's displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

### Activity-1:

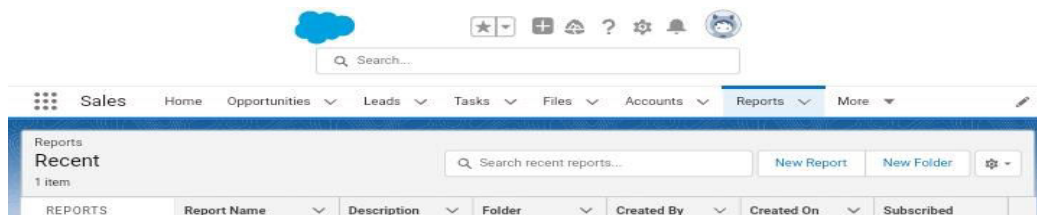
#### Creation of report

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.

The screenshot shows a report builder interface. At the top, there's a navigation bar with 'Sales' selected and other options like Home, Opportunities, Leads, Tasks, Files, Accounts, Reports, and More. Below this is a search bar and a 'REPORT' dropdown. The main title is 'New Passports with Visa slots Report'. To the right of the title are buttons for 'Add Chart', 'Save & Run', 'Save', 'Close', and 'Run'. Below the title bar, there's a 'Fields' panel on the left with 'Outline', 'Filters', and 'Columns' sections. The 'Outline' section shows 'GROUP ROWS' with 'Passport: ID' and 'GROUP COLUMNS' with 'Passport: Passport Name'. The 'Columns' section shows 'Visa slot: Visa slot Name'. The main area displays 'Passport: ID', 'Passport: Passport Name', and 'Total'. A message states 'No records returned. Try editing report filters:' with links to 'Show All passports' and 'Edit other filters in the filter panel.' At the bottom, there's a 'Details (0 Rows)' section and a footer with toggle switches for 'Row Counts', 'Detail Rows', 'Grand Total', 'Stacked Summaries', and 'Conditional Formatting'.

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.

The screenshot displays the Salesforce Reports interface. At the top, there is a navigation bar with tabs for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Reports, and More. Below this, a sub-navigation bar shows the 'REPORT' section with a dropdown menu. The main area is titled 'New Passports with Visa slots Report' and includes a 'Passports with Visa slot' filter. A 'Filters' panel on the left shows 'Show Me My passports' and 'Passport: Created Date All Time'. The main content area shows a table with columns 'Passport: ID', 'Passport: Passport Name', and 'Total'. A message states 'No records returned. Try editing report filters:'. Below the table, a 'Details' section shows 'Visa slot: Visa slot Name'. At the bottom, there are checkboxes for 'Row Counts', 'Detail Rows', 'Grand Total', 'Stacked Summaries', and 'Conditional Formatting', all of which are checked.

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 Passport with Visa location.

12) Click on save and run for saving the report.

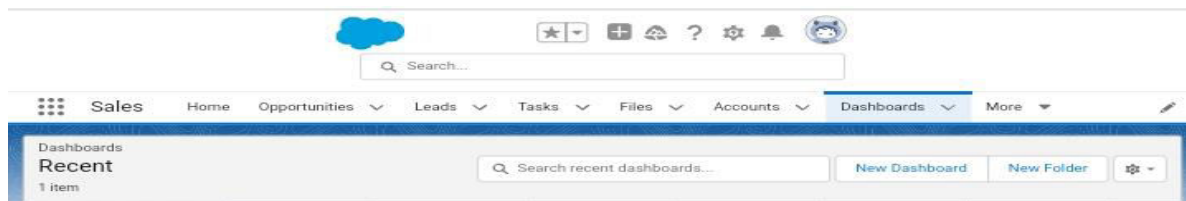
## Milestone-7 Dashboards

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.



3) Select the new dashboard option.

4) Name the dashboard has a passport with visa locations.

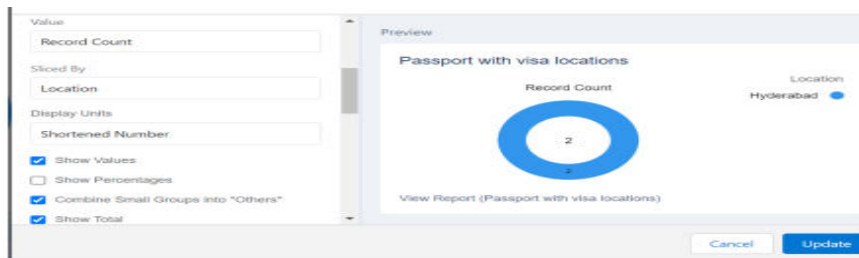
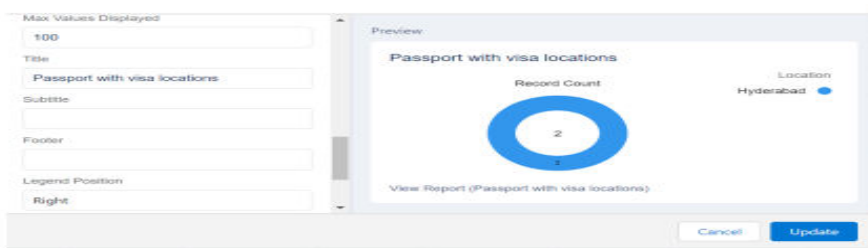


5) And select create option.

6) Now click on Add component and for report select passport with locations.

7) Select the donut chart in display as section.

8) Ensure that value is record count and sliced by locations.



9) Leave the default values.

10) Click on add.

11) And save the dashboard.

Advantage:

CRM Application might be used by a government agency or a visa processing enter to schedule and manage appointment with application.

Conclusion:

This is way to developin this CRM Application That Helps To Book a Visa slot.

Future hope:

The appointment booking calendar and CRM together create the ultimate all in one front end.