CRM Application That helps to Book a Visa Slot

INTRODUTION

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?"

Problem Definition & Design Thinking

2.1 Empathy Map
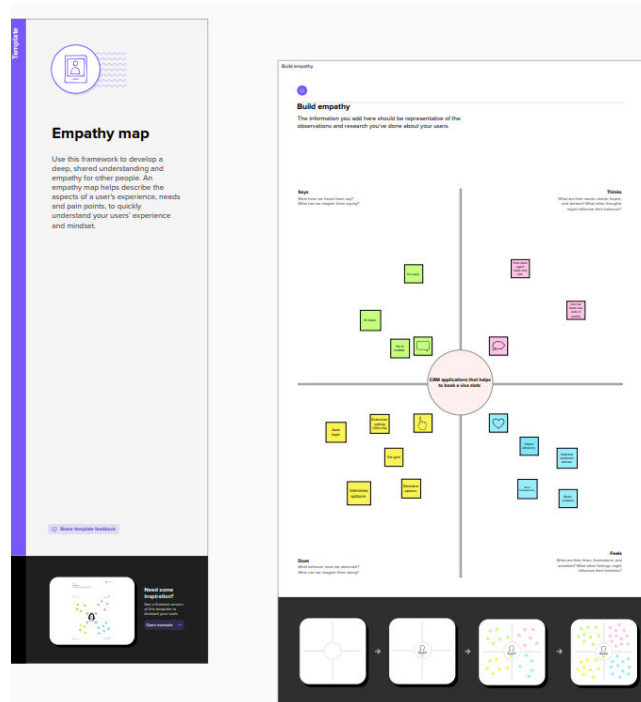
2.1 Ideation & Brainstorming Map
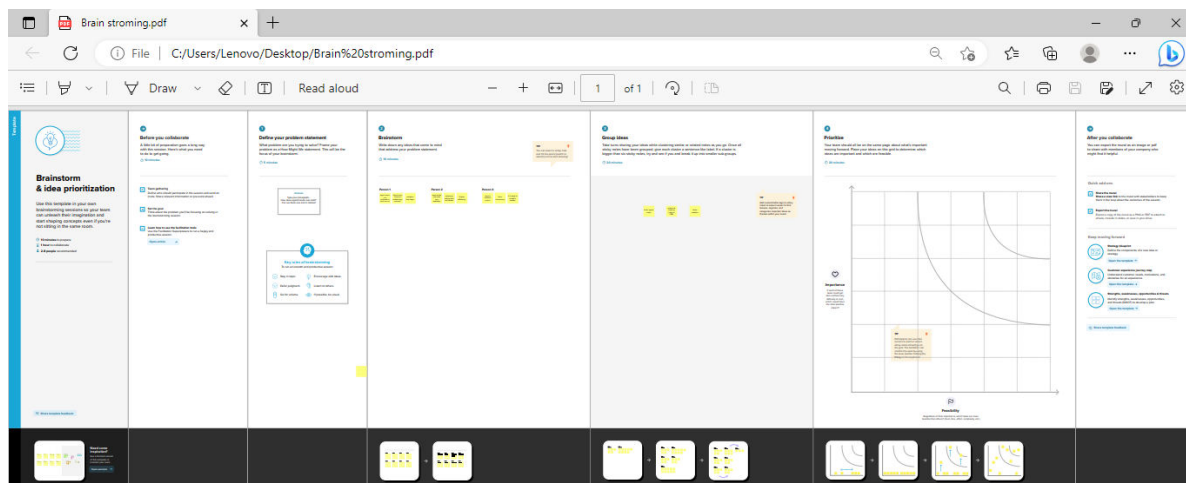
RESULT

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/

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
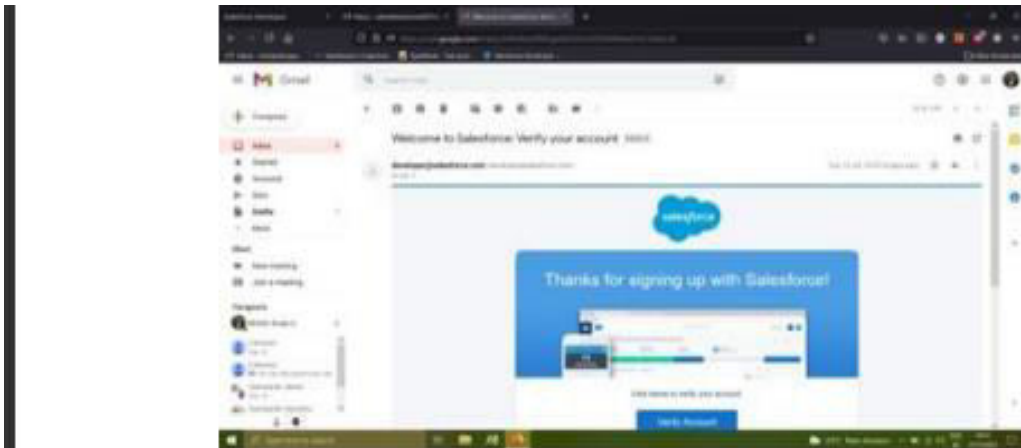
Click on sign up after filling these.

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
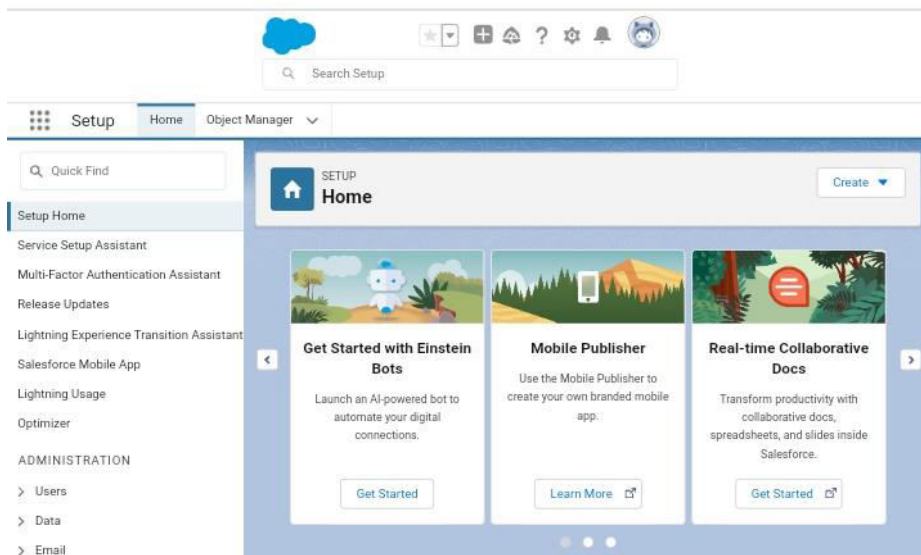
take 5-10mins,as

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

htttps://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.
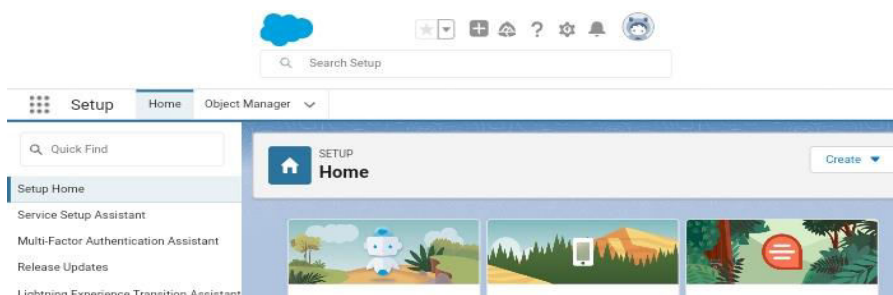
2) custom objects.

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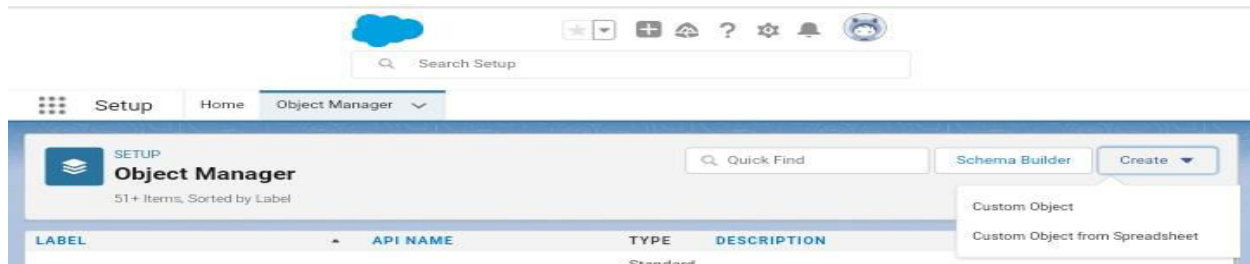
3) You will navigate to custom object definition edit where you have to give the object name.

4) The label name has Passport and Plural label has Passports.

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.
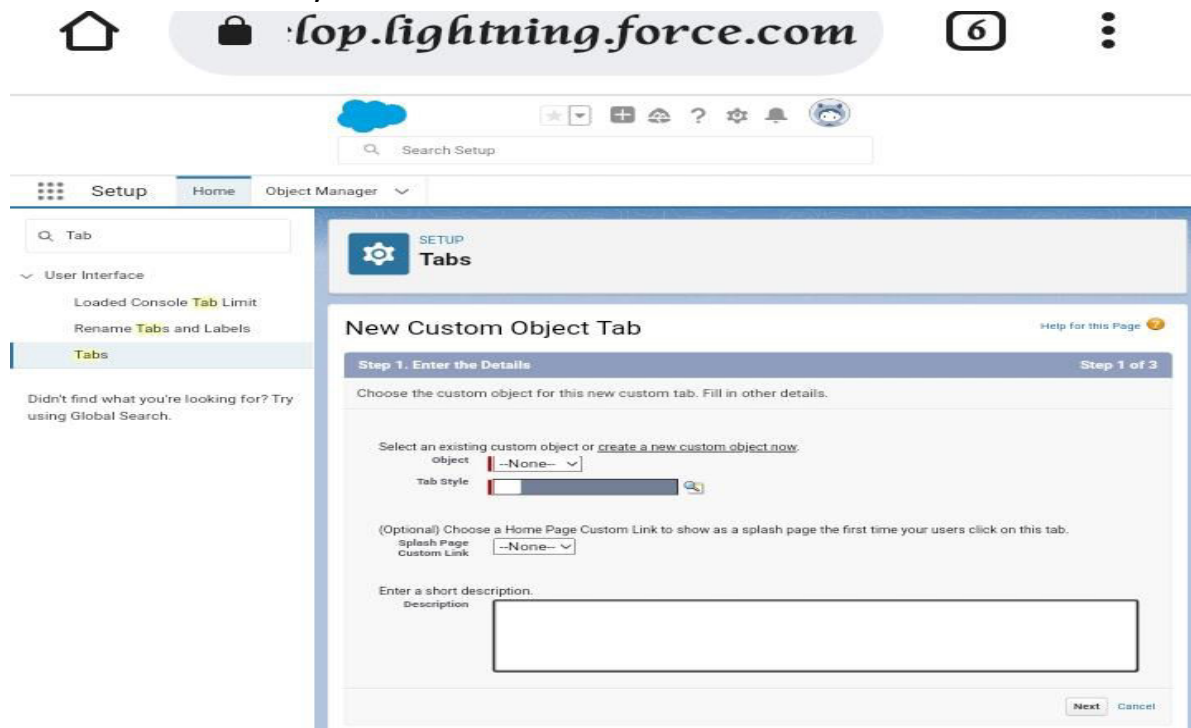
10) After tab selection you will be navigated to add to profiles select default on click on next.

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.
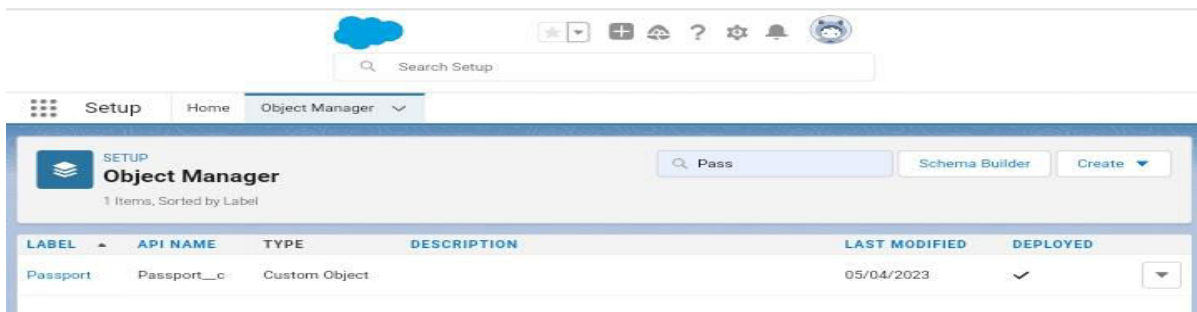
c 2) And select the option fields and relationships.
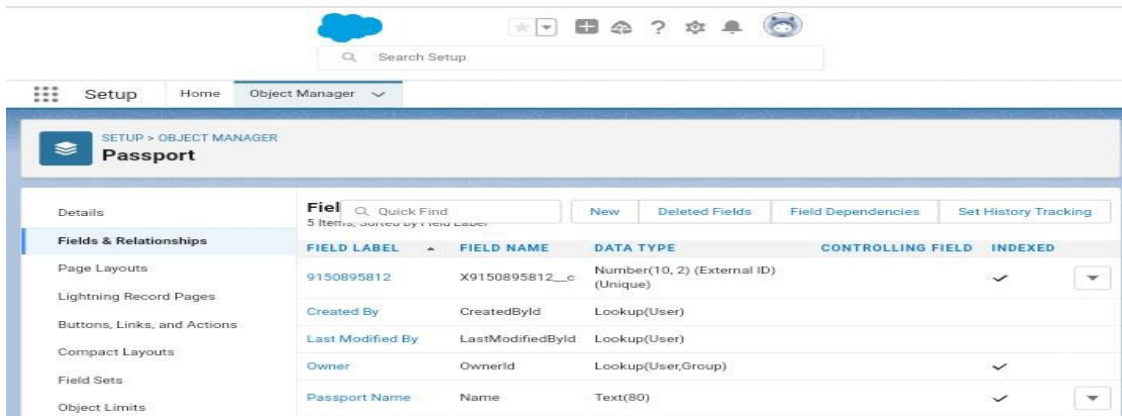
3) At the top right side you can find a new select that option.

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.
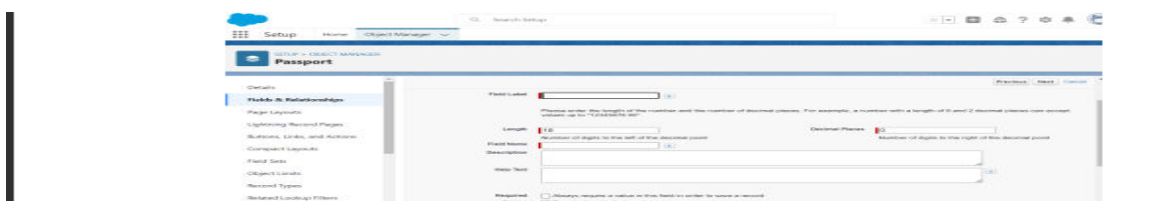
6) And give the label name has Contact number.

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.
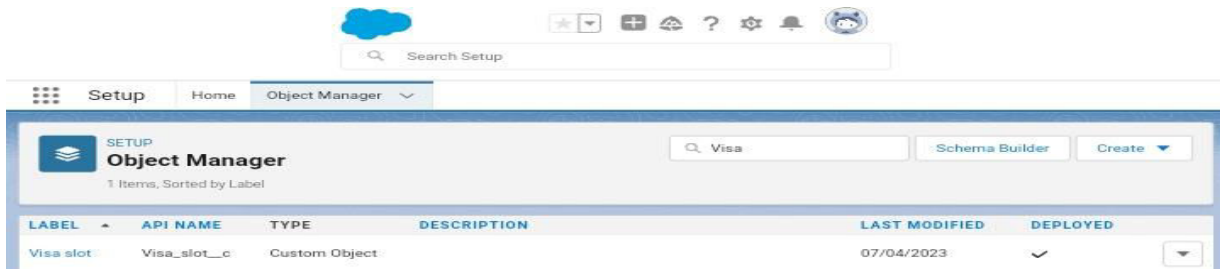
3) And select fields and relationships and click on new.

4) Select the data type has Master detail relationship.
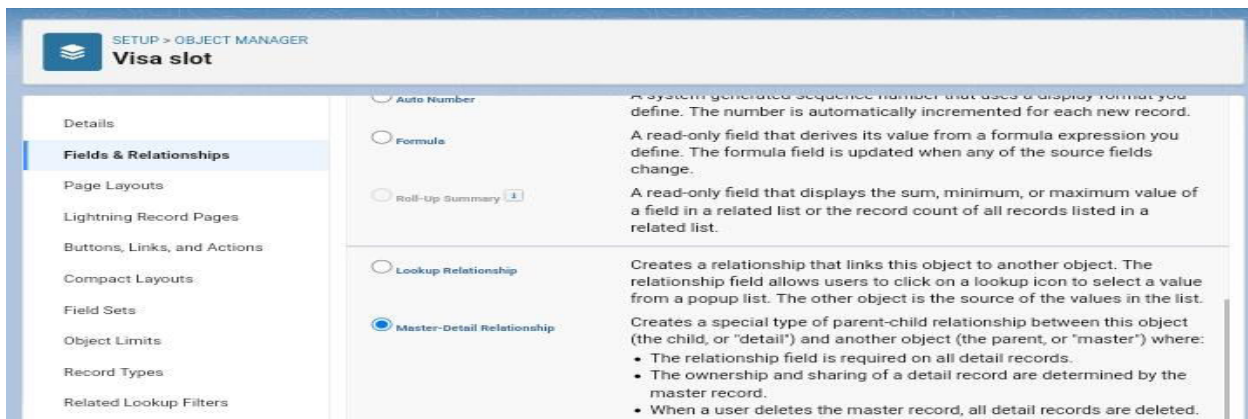
5) And select related to the object has passport, and click on next.
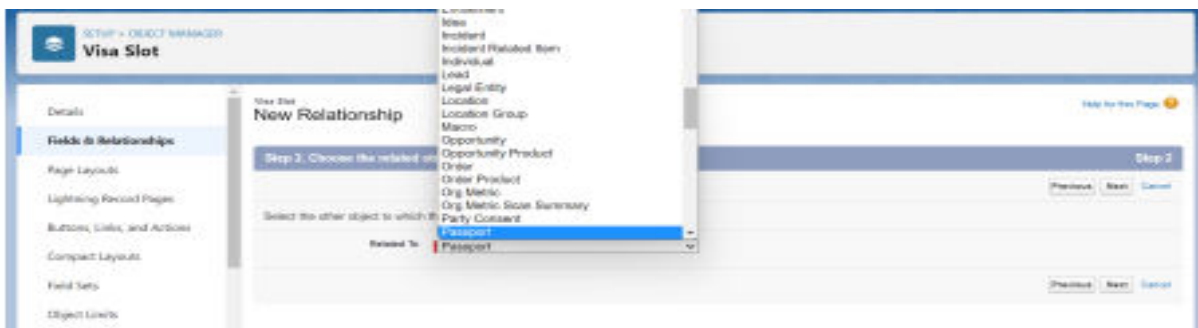
6) You will navigate to the label name page where you give the label name for the field, give it has passport number and click next.

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
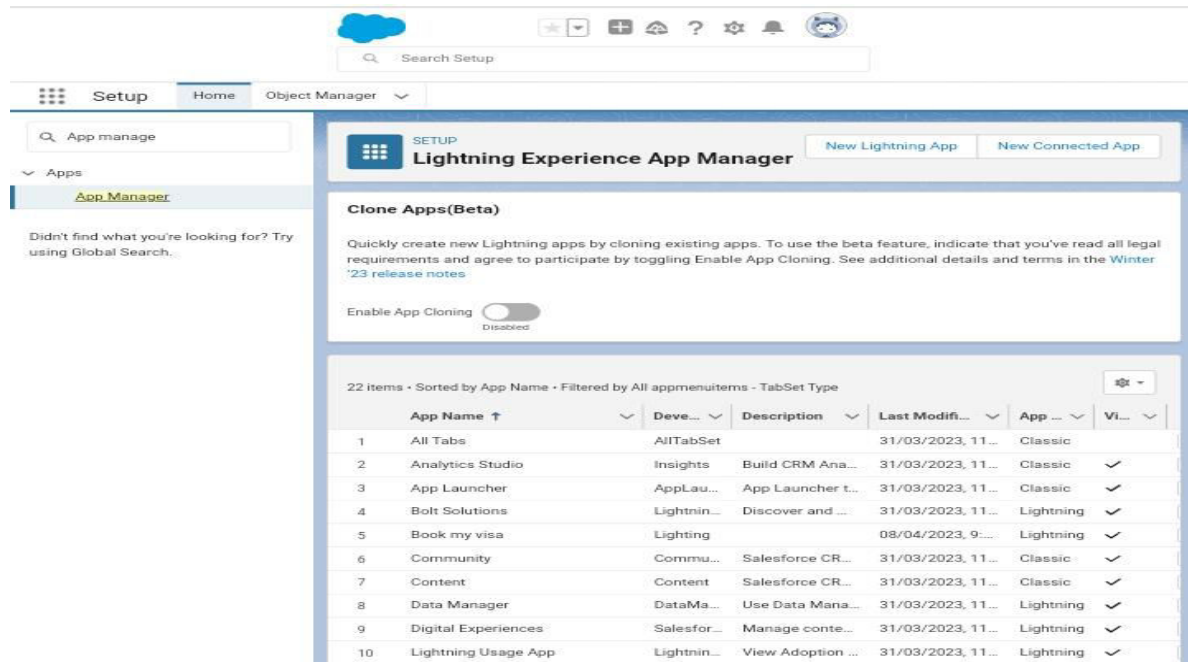
2) And select an option for a new lightning app.

3) Give the app name has book my visa.
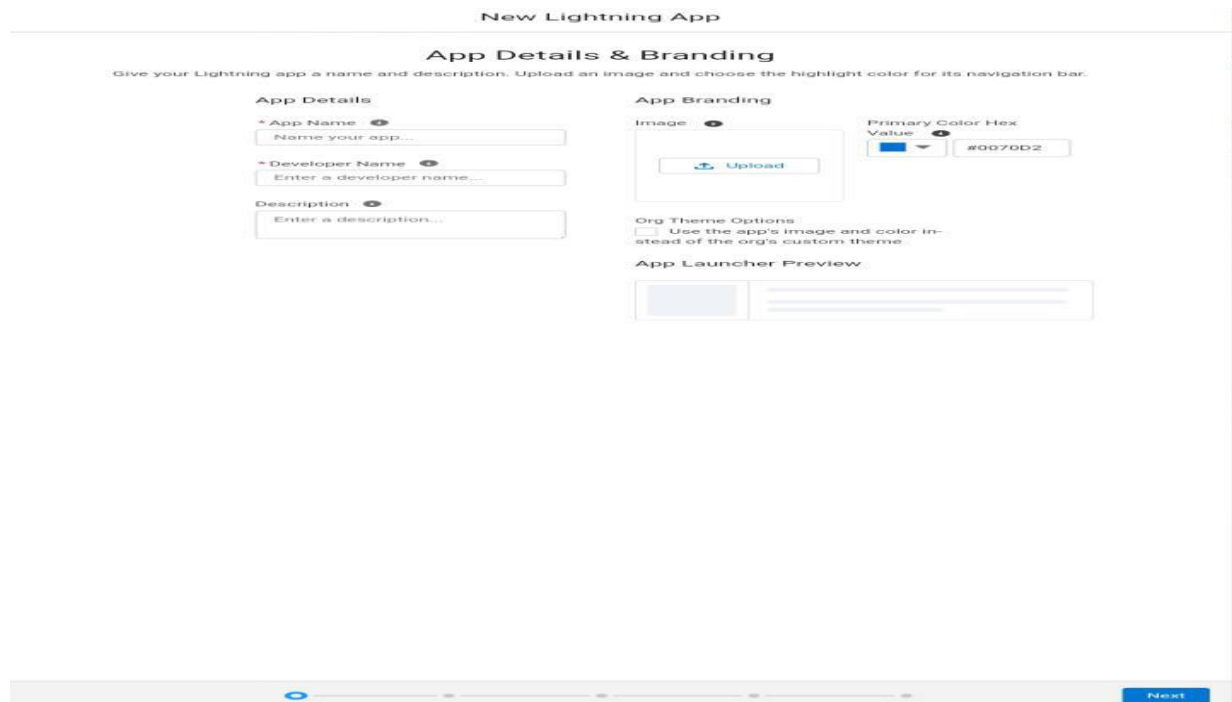
4) Upload the picture and click next.

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.

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

Milestone-5 User:
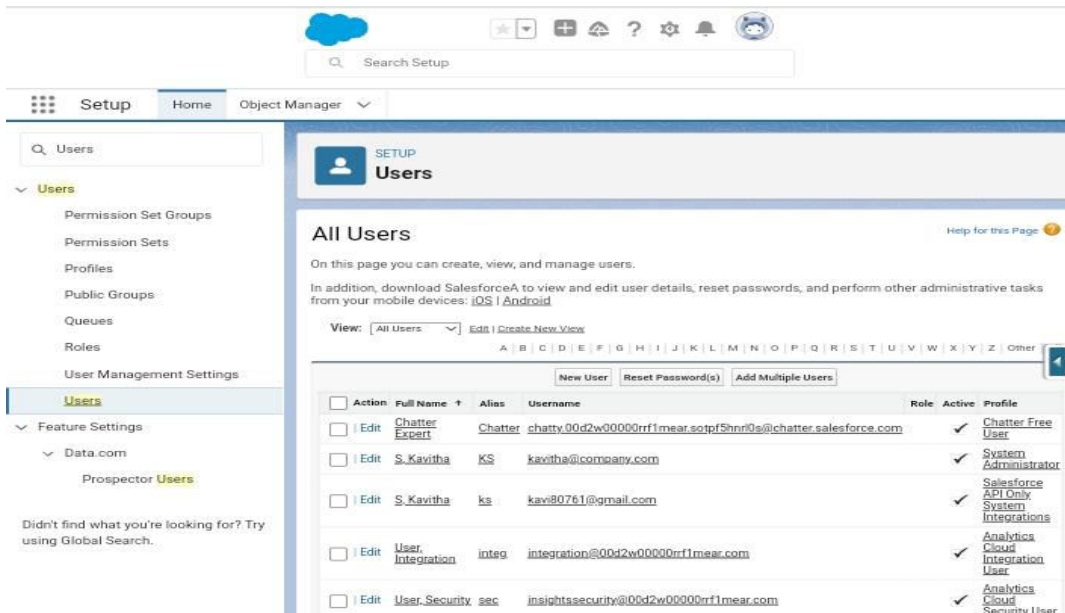
A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

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.

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

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.
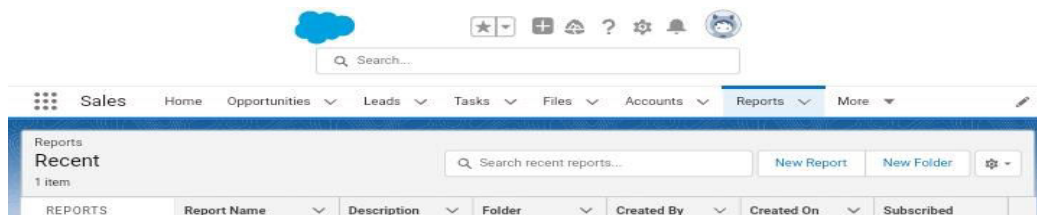
Activity-1:

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.
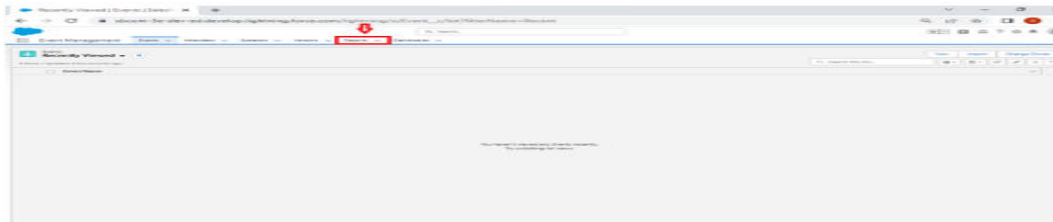
2) And select a new report, for the record type category select other reports.

3) Select passport with visa slots for the report type name

. 4) Select the start button to create a new report.

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 Passport with Visa location.
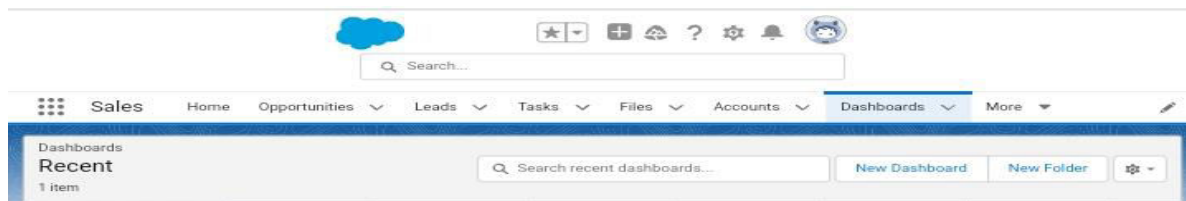
12) Click on save and run for saving the report.

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.
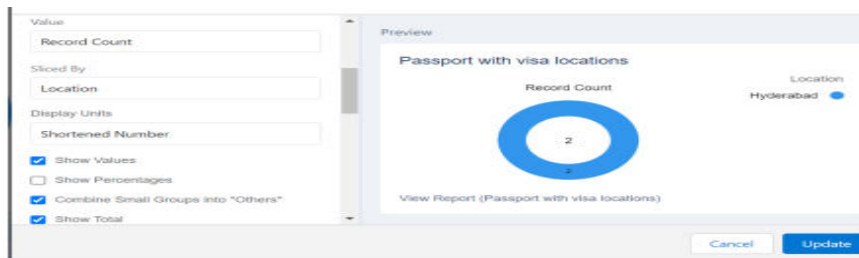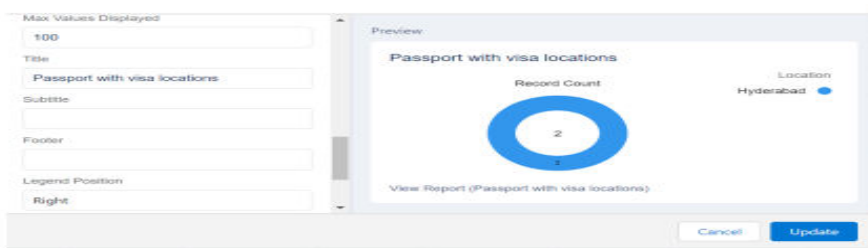

5) And select create option.

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.