

# **CRM APPLICATION THAT HELPS TO BOOK A VISA SLOT**

## **INTRODUCTION**

### **Overview:**

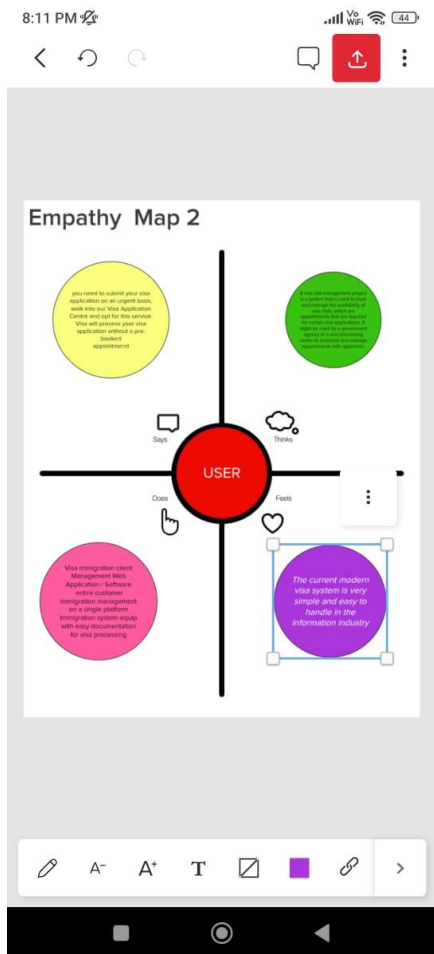
**A visa slot management project is a system that used to track and manage the availability of visa slot, which are appoints that are required for certain visa applications. It might be used by a government agency or a visa processing center to schedule and manage appointment with applicants.**

### **Purpose:**

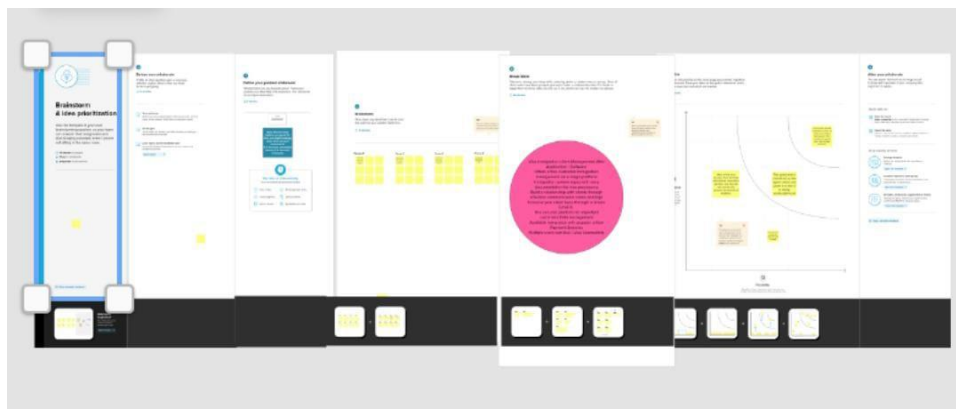
**Saving the time of the customers who want to book it by using CRM application of booking a visa slot. Wandering for booking the visa slot and tracking can be reduce here. Reduce the paper filling as much the customer expecting. Ensuring the safety of the customers and panic of many verification.**

## Problem definition and design thinking:

### Empathy map:



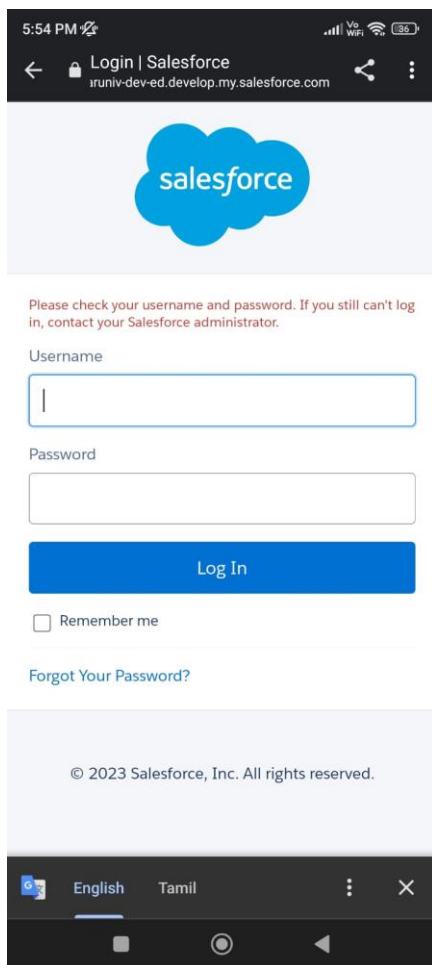
### Ideation and Brainstorming map:



# ACTIVITY AND SCREENSHOTS

## 1. Creation of Salesforce platform:

**Go to Developer; salesforce .com and lick on sign up. Ender our Detail as name, Email, Role, Company etc., Email is used your mail id. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account.**



The screenshot shows the Salesforce login page on a mobile device. At the top, the status bar displays the time as 5:54 PM and various connectivity icons. The browser address bar shows the URL 'Login | Salesforce' and 'runiv-dev-ed.develop.my.salesforce.com'. The Salesforce logo is prominently displayed in the center. Below the logo, a message reads: 'Please check your username and password. If you still can't log in, contact your Salesforce administrator.' The login form includes a 'Username' field with a cursor, a 'Password' field, and a blue 'Log In' button. A 'Remember me' checkbox is located below the password field. A link for 'Forgot Your Password?' is positioned below the 'Remember me' checkbox. At the bottom of the page, the copyright notice '© 2023 Salesforce, Inc. All rights reserved.' is visible. The mobile interface also shows a language selector at the bottom with 'English' and 'Tamil' options, and a standard Android navigation bar at the very bottom.

## 2. Creation of custom object : Passport

**Navigate to setup to select the object and create the object gives the detail like label name has Passport and enter the plural name, record name data type, etc. And save it.**

Quick Find / Search

Expand All | Collapse All

Lightning Experience Transition Assistant

Move to the new, more productive Salesforce

Get Started

Salesforce Mobile Quick Start

Home

Administer

- Release Updates
- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Data Classification

## New Custom Object

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](#)

Custom Object Definition Edit Save Save & New Cancel

### Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label  Example: Account

Plural Label  Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name  Example: Account

Description

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

Object involved in Book a visa are Visa Slot, Payment, Reschedule create in this type

Visa Slot:

Quick Find / Search

Expand All | Collapse All

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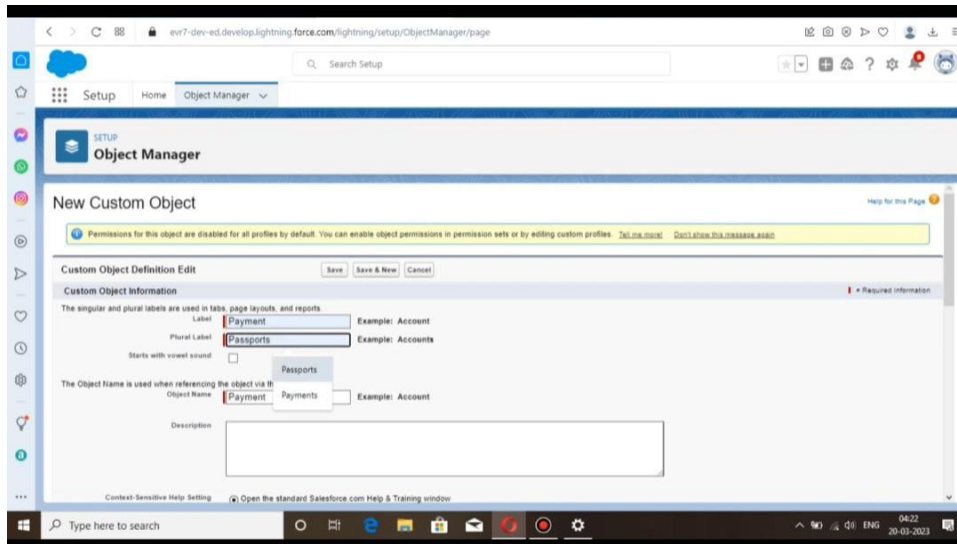
Object Name  Example: Account

Description

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

Content Name

## Payment:



## Create of field on custom object::

### Passport:

Select our object from the selection has Passport and select option field and Relationship. Select our data type as number go to the next page enter the field label has Contact Number and length should be 10 and you can find options like required, unique, external id select required option so that always require a value in this field in order to save. Go to next page on visible checkbox so that it is visible to all profile and select option and save it. The passport field are create like this type.

## Contact number:

The screenshot shows the Salesforce Setup interface for creating a new custom field for the 'Passport' object. The page is titled 'New Custom Field' and is at 'Step 2 of 4: Enter the details'. The left sidebar shows the 'Fields & Relationships' section. The main form has the following fields:

- Field Label:
- Length:  (Number of digits to the left of the decimal point)
- Decimal Places:  (Number of digits to the right of the decimal point)
- Field Name:
- Description:
- Help Text:

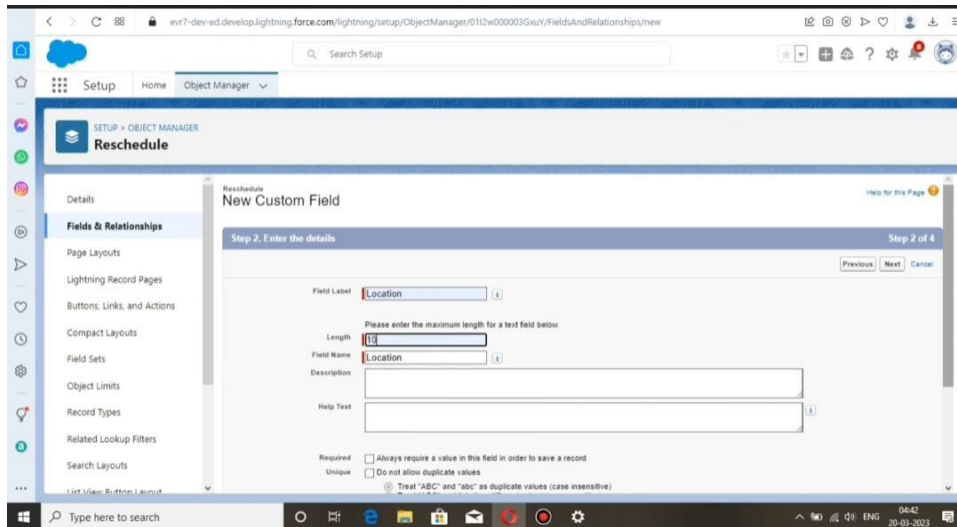
## Passport Number:

The screenshot shows the Salesforce Setup interface for creating a new custom field for the 'Passport' object. The page is titled 'New Custom Field' and is at 'Step 2 of 4: Enter the details'. The left sidebar shows the 'Fields & Relationships' section. The main form has the following fields:

- Field Label:
- Length:  (Please enter the maximum length for a text field below.)
- Field Name:
- Description:
- Help Text:
- Required: ☐ Always requires a value in this field in order to save a record
- Unique: ☐ Do not allow duplicate values
- ☐ Treat "ABC" and "abc" as duplicate values (case insensitive)

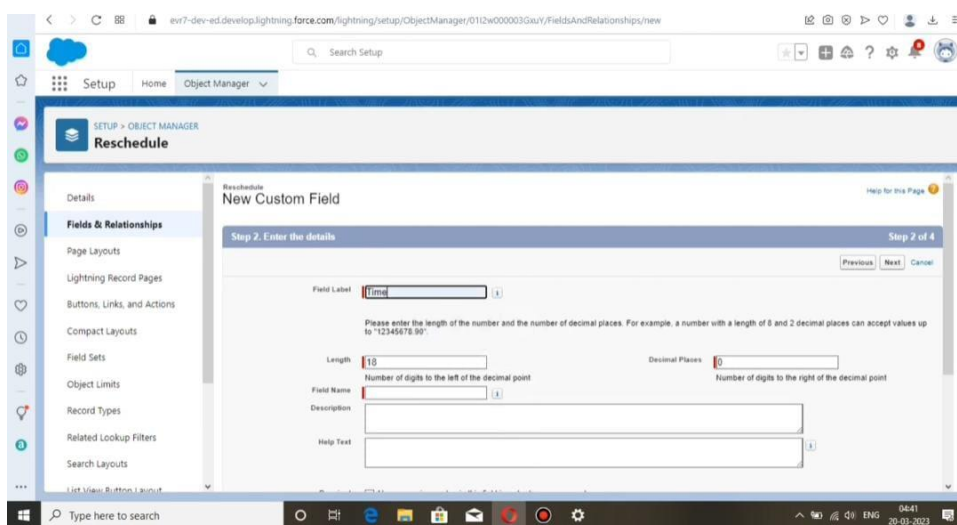
## Creation of fields on the custom: visa slot

## Location:



Select our object from the selection has passport and select option field and Relationship. Select our data type as text go to next page enter the field label has location and length should be 10 and you can find options like required, unique, external id select required option so that always required a value in the field in order to save. Go to nextpage on visible checkbox so that it is visible to all field and select option and save it. The visa slot field are create like this type.

**Time:**





The screenshot shows the Salesforce Lightning Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'SETUP > OBJECT MANAGER' and 'Visa slot'. The left sidebar shows a list of setup options, with 'Fields & Relationships' selected. The main area displays the 'New Custom Field' wizard, which is at 'Step 2 of 4: Enter the details'. The wizard form includes fields for 'Field Label' (Passport Number (Master)), 'Field Name' (Passport Number (Master)), 'Length' (10), 'Number of d' (0), 'Decimal Places' (0), 'Description' (Payment), and 'Help Text' (Payment Mode). A dropdown menu is open for the 'Field Name' field, showing a list of suggestions including 'Permanent Address', 'Passport', and 'Payment Number (Master)'. The bottom of the screen shows the Windows taskbar with various application icons and the system clock.

ev7-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000003Gx9z/FieldsAndRelationships/new

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
Visa slot

Details

**Fields & Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Field Label: Visa slot number

Length: 10

Field Name: Visa\_slot\_number

Description:

Help Text:

Required: ☐ Always require a value in this field in order to save a record

Unique: ☐ Do not allow duplicate values

☒ Treat "ABC" and "abc" as duplicate values (case insensitive)

☐ Treat "ABC" and "abc" as different values (case sensitive)

External ID: ☐ Set this field as the unique record identifier from an external system

Related: ☒ Add this field to existing custom report types that contain this entity

Default Value: [Show Formula Editor](#)

Select our object from the selection has Passport and select option field label Relationship. Select but data type as text go to next page enter the field lable has Payment Mode and length should be 10 and you can find options like required , unique, external id select required option so that always require a calue in this field in order to save. Go to next page on visible checkbox so that it is visible to all profile and select option and save it. The payment are create like this type.

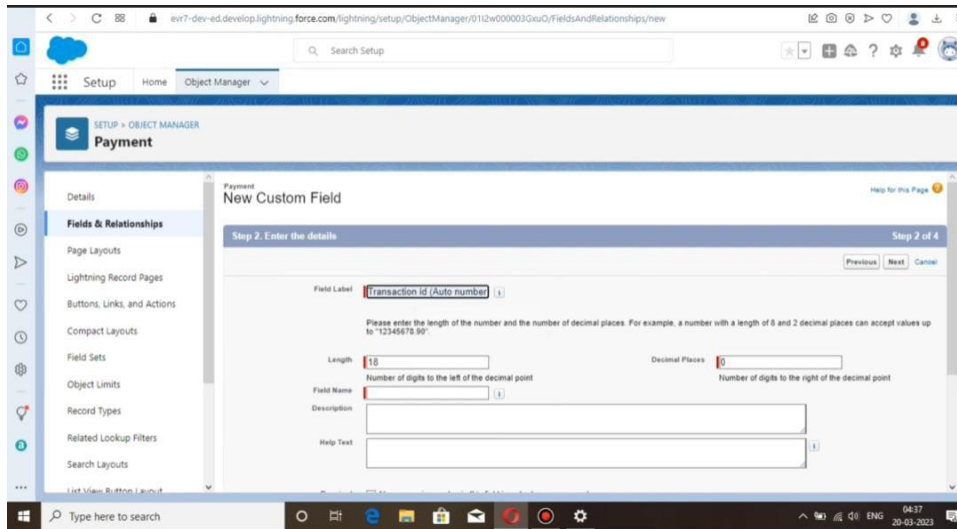
## Payment Mode:

The screenshot displays the Salesforce Object Manager interface for creating a new custom object. The page title is 'New Custom Object'. A warning message 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 to docs] [Link to docs]'. Below this, the 'Custom Object Definition Edit' section is visible, with buttons for 'Save', 'Save & New', and 'Cancel'. The 'Custom Object Information' section contains the following fields:

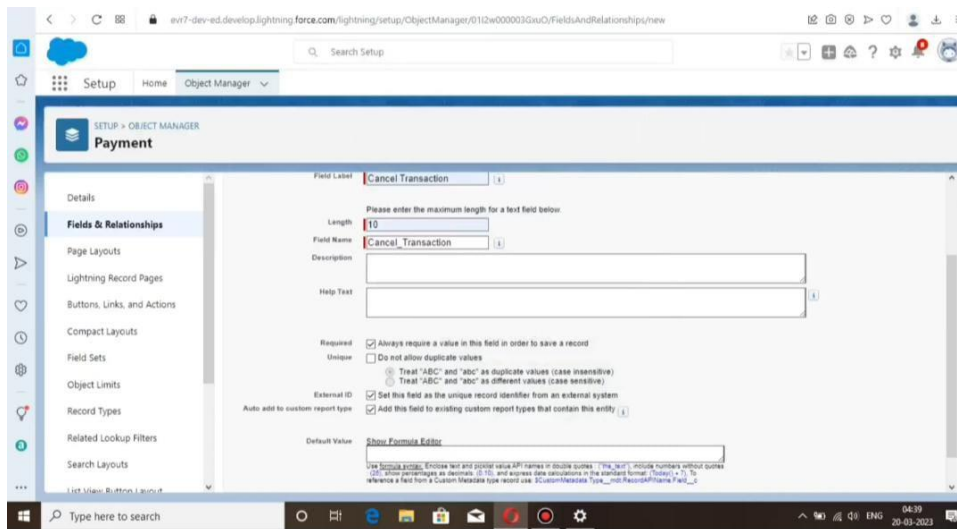
- Label:** Payment (Example: Account)
- Plural Label:** Passports (Example: Accounts)
- Starts with vowel sound:** ☒
- Object Name:** Payment (Example: Account)
- Description:** (Empty text area)

The page also includes a 'Help for this Page' link and a 'Context-Sensitive Help Setting' link at the bottom.

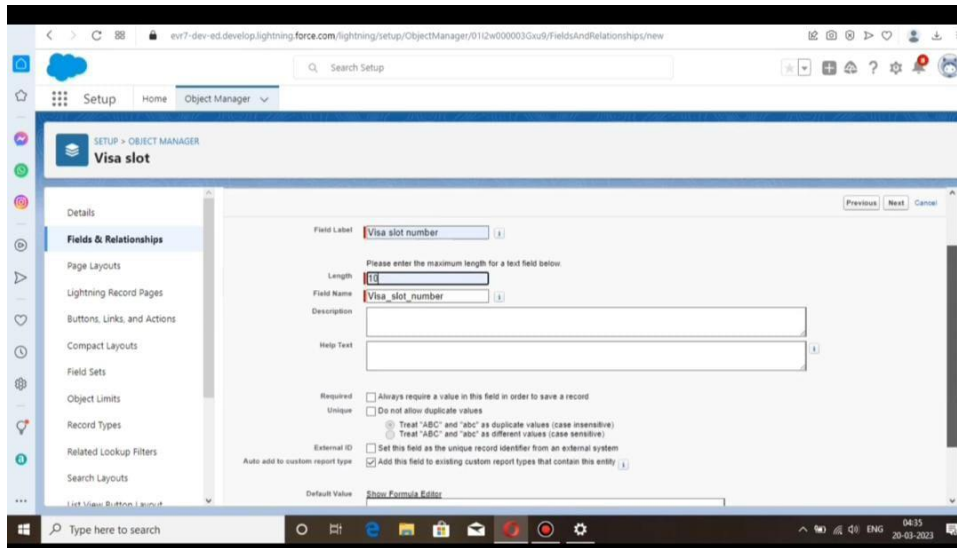
## Transaction id (Auto Number):



**Cancel transaction:**

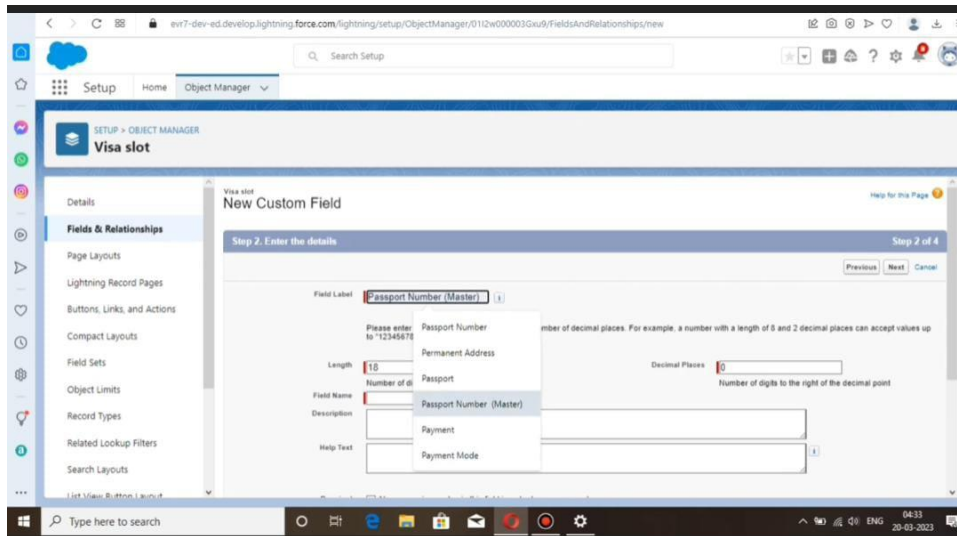


**Visa Slot number(Master):**

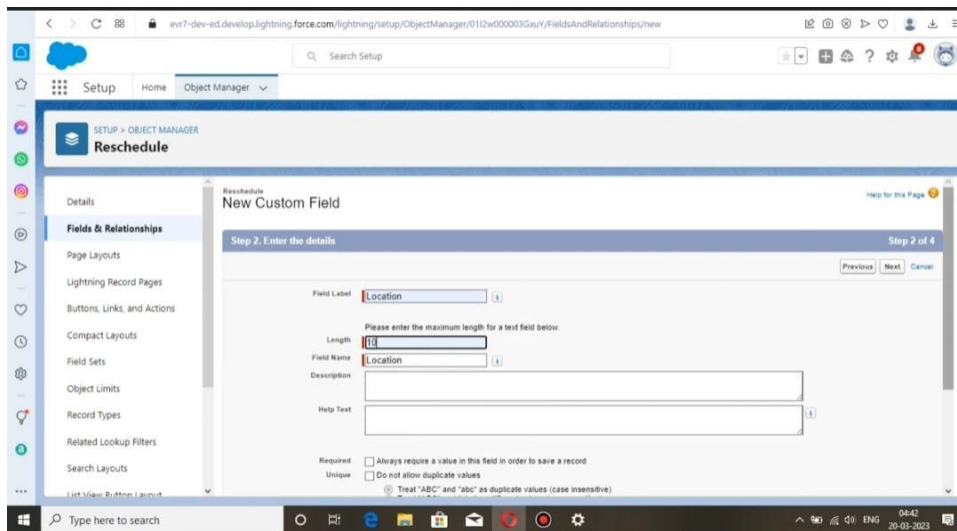


## Creation of field on custom object: Reschedule/Cancel Passport number(Master):

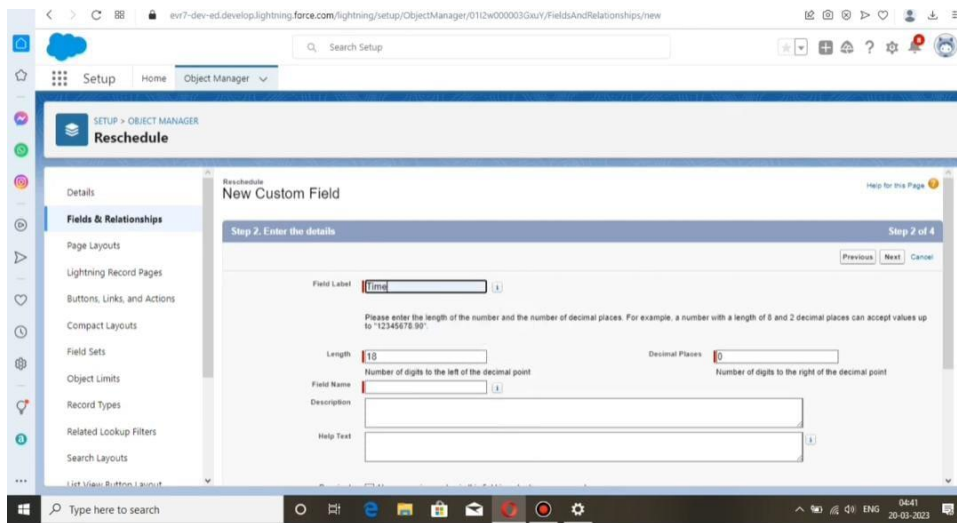
Select our object from the selection has Reschedule/Cancel field and Relationship. Select our data type as number go to the next page enter the field label has passport number(master) and length should be 10 and you can find options like required, unique, external id select required option so that always require a value in this fireld in order to save. Go to next page on visible checkbox so that it is visible to all profile and select option and save it. The Reschedule/Cancel Field are create like this type.



**Location:**

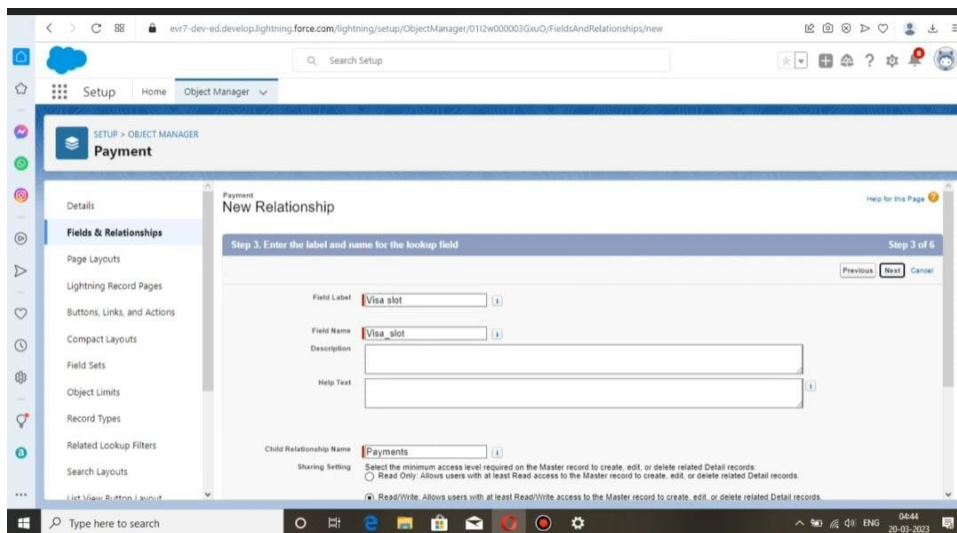


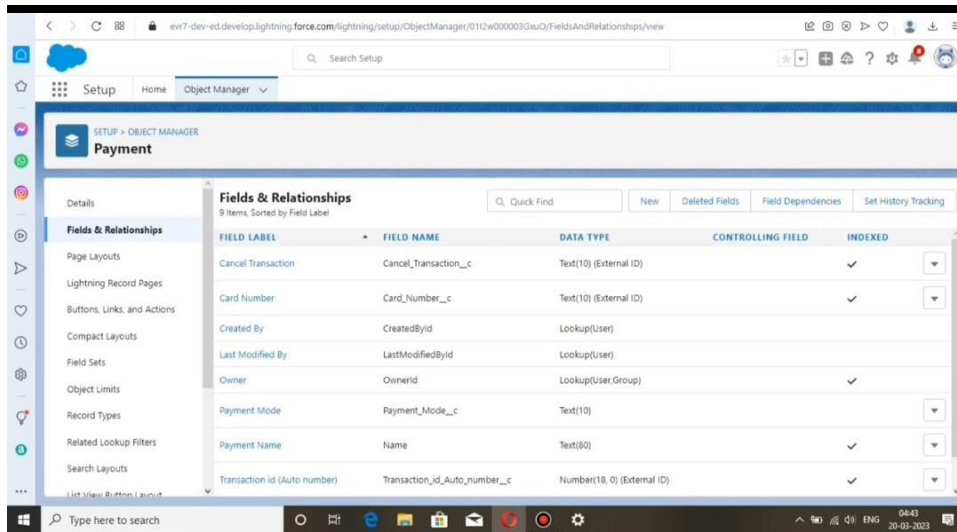
**Time:**



### 3. Creation of Relationship: Relationship between objects

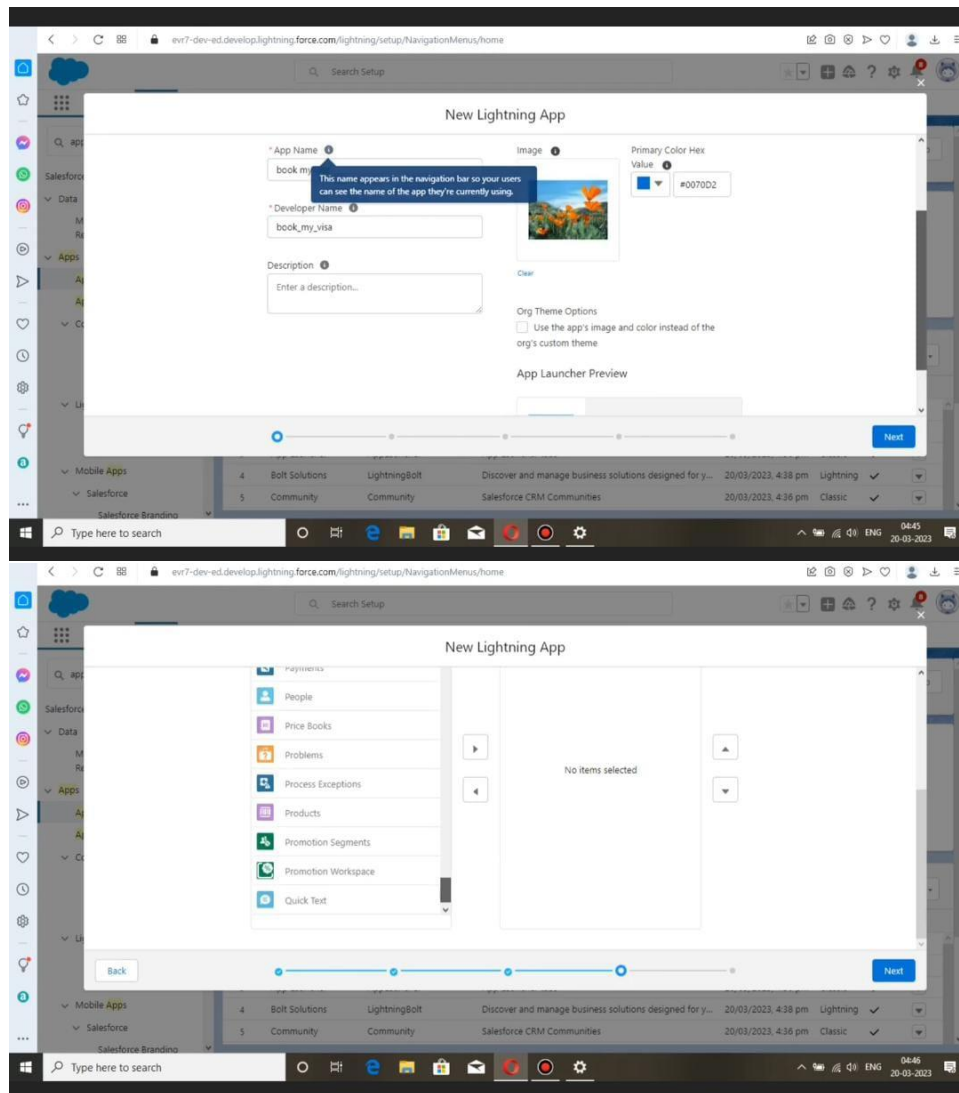
To select a Master Detail relationship between passport and visa select the object manager visa slot object from the list and select the field and relationship and click new. The data type has Master detail relationship and go to the next page and save it. To create the Relationship between payment and visa slot in this type.





## 4. Creation of app:

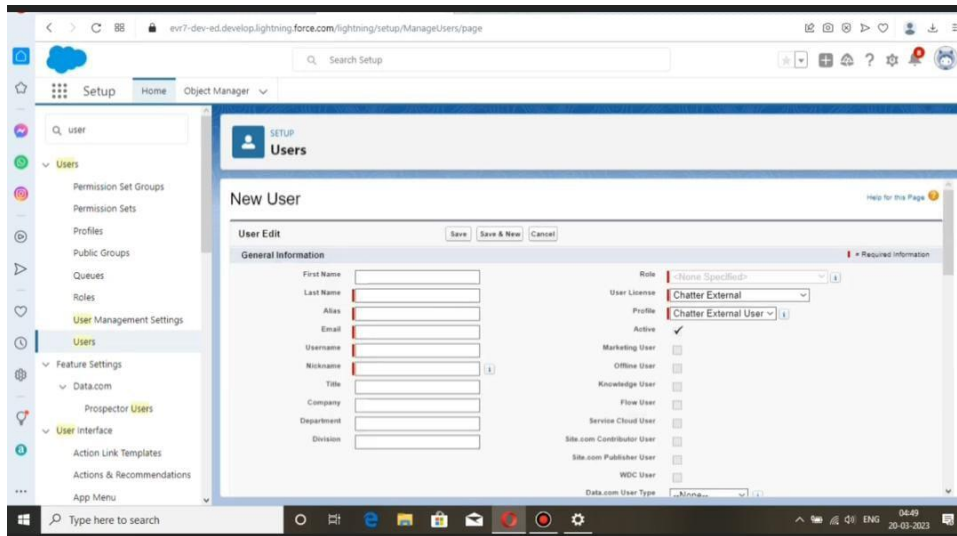
Navigate to setup and search for app manager. To select the new lightning app option and give the app name has book my visa and upload the picture, click next . Choose the navigation style click the next page move the objects from available items to selected items. And select the admin profile, save it.



## 5. Creation of users:

Navigate to setup in quick find search bar, search in user and select it. Give the first name and last name. Enter your email and enter username. Select your user license of salesforce. The profile field is standard user. At bottom of the page check the box to generate a new password and save the page.





## OWD. Organization wide default settings

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

Go to the setup to find out the sharing setting select it. Edit the organization –wide Default and select the passport and change the default external access to Public/Read/write.

## 6. Create a Report

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

Passport with visa locations

Previewing a limited number of records. Run the report to see everything. Update Preview

Location	Passport ID	Record Count	Total
New Delhi	a042w00000vMTBq	1	0
Mumbai	a042w00000vNRg3	1	0
Chennai		0	1
Hyderabad		1	1
<b>Total</b>		<b>3</b>	<b>2</b>

Details (5 Rows) Click an intersection in the table above to filter details.

Passport Number	Visa Slot Number
09rf243	V-00002
09rf243	V-00003
3536we	V-00004
09rf243	V-00001

Row Counts ☒ Detail Rows ☒ Grand Total ☒ Stacked Summaries ☒

## 7. Create a Dashboard

Go to the app launcher and search for book a visa. Select the dashboard and click new dashboard. Click Add Component and report select passport with location.

100

Title  
Passport with visa locations

Subtitle

Footer

Legend Position  
Right

Preview

Passport with visa locations

Record Count

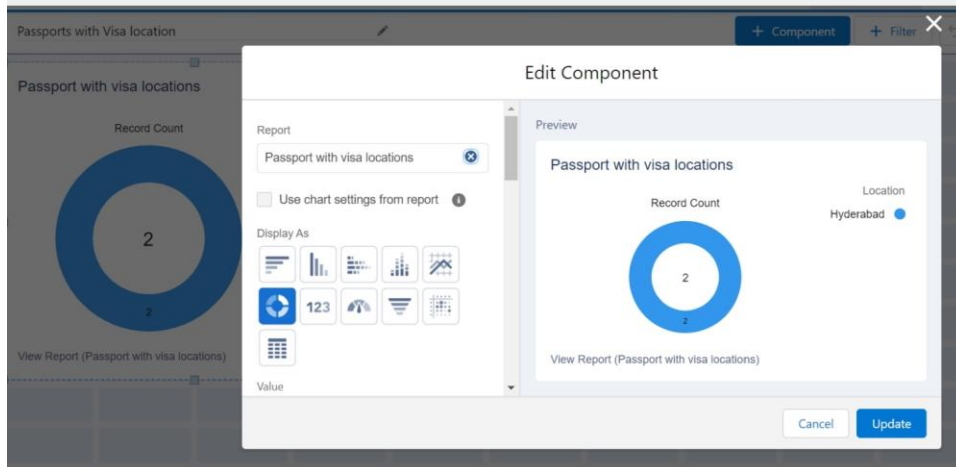
Location  
Hyderabad

2

View Report (Passport with visa locations)

Cancel Update

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



## 8. Trailhead Profile Public URL

Team lead – <https://trailblazer.me/id/muthulakshmi724>

Team Member 1 – [trailblazer.me/id/mmari483](https://trailblazer.me/id/mmari483)

Team Member 2 – [trailblazer.me/id/push19](https://trailblazer.me/id/push19)

Team Member 3 – [trailblazer.me/id/jpushpalatha](https://trailblazer.me/id/jpushpalatha)

# PROJECT REPORT TEMPLATE

## 9. Advantages:

- Processing is fast.
- Saving time.
- No wandering.
- Not much paper work.
- Easiest way.

## **Disadvantages:**

- **Internet connection problem is there.**
- **Poor connection leads to trouble and anxiety.**
- **Poor communication.**
- **Lack of leadership.**
- **Burdensome Data entry.**

## **10. Applications**

- **Tracking Customers.**
- **Collecting Data for Marketing**
- **Improving Interaction and Communications.**
- **Streamlining Internal Sales Processes..**

## **11 . Conclusion**

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

## **12. Future Scope**

**The future of CRM is about which companies will be able to pivot to meet the changing needs and trends – drive by customer expectations. Customer expect organization to know a lot about them and expect to have conversation.**





