

CRM APPLICATION THAT HELPS TO BOOK A VISA SLOT

**Project Based Experiential
Learning Program**

CRM APPLICATION THAT HELPS TO BOOK A VISA SLOT

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DINDIGUL-624001.

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1.INTRODUCTION :

Salesforce is a cloud-based software company that provides its customers with a platform to develop their own applications without following the tough steps that they used to follow in the legacy system. The software or application once created can be uploaded onto the cloud allowing the end-users to view them.

1.1 OVERVIEW :

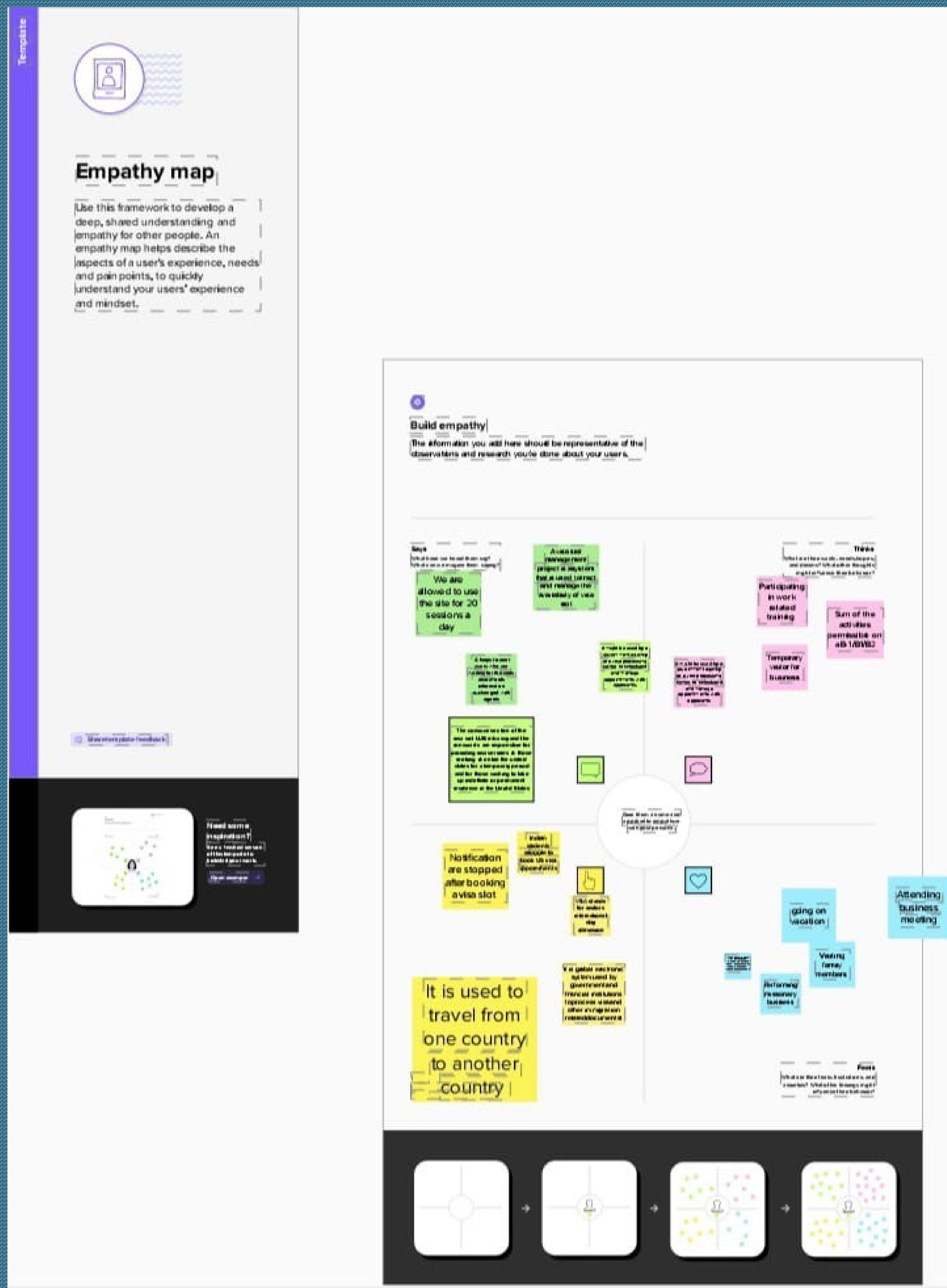
A visa slot management project is a system that is used to track and manage the availability of visa

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 :

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.



2.2 Ideation & Brainstorming Map

2

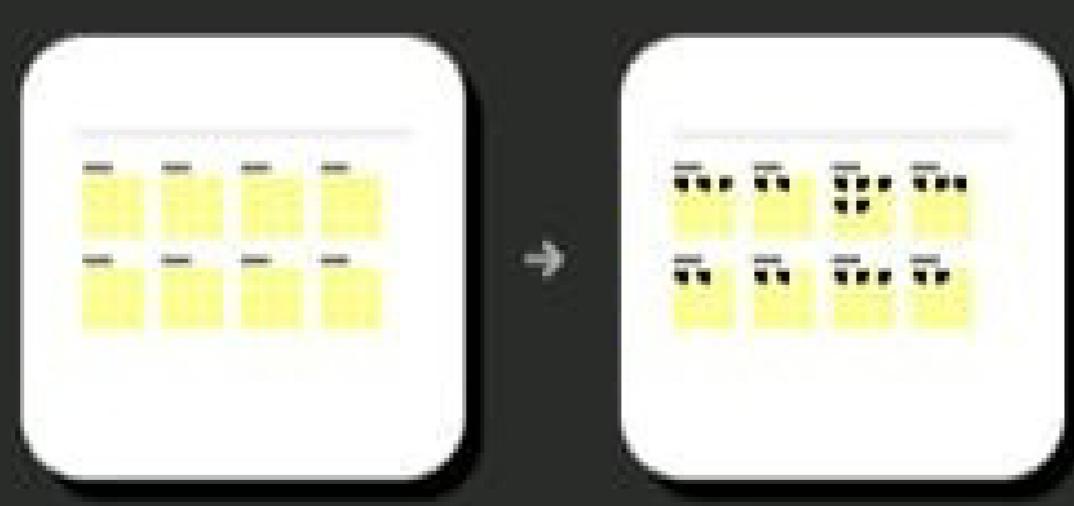
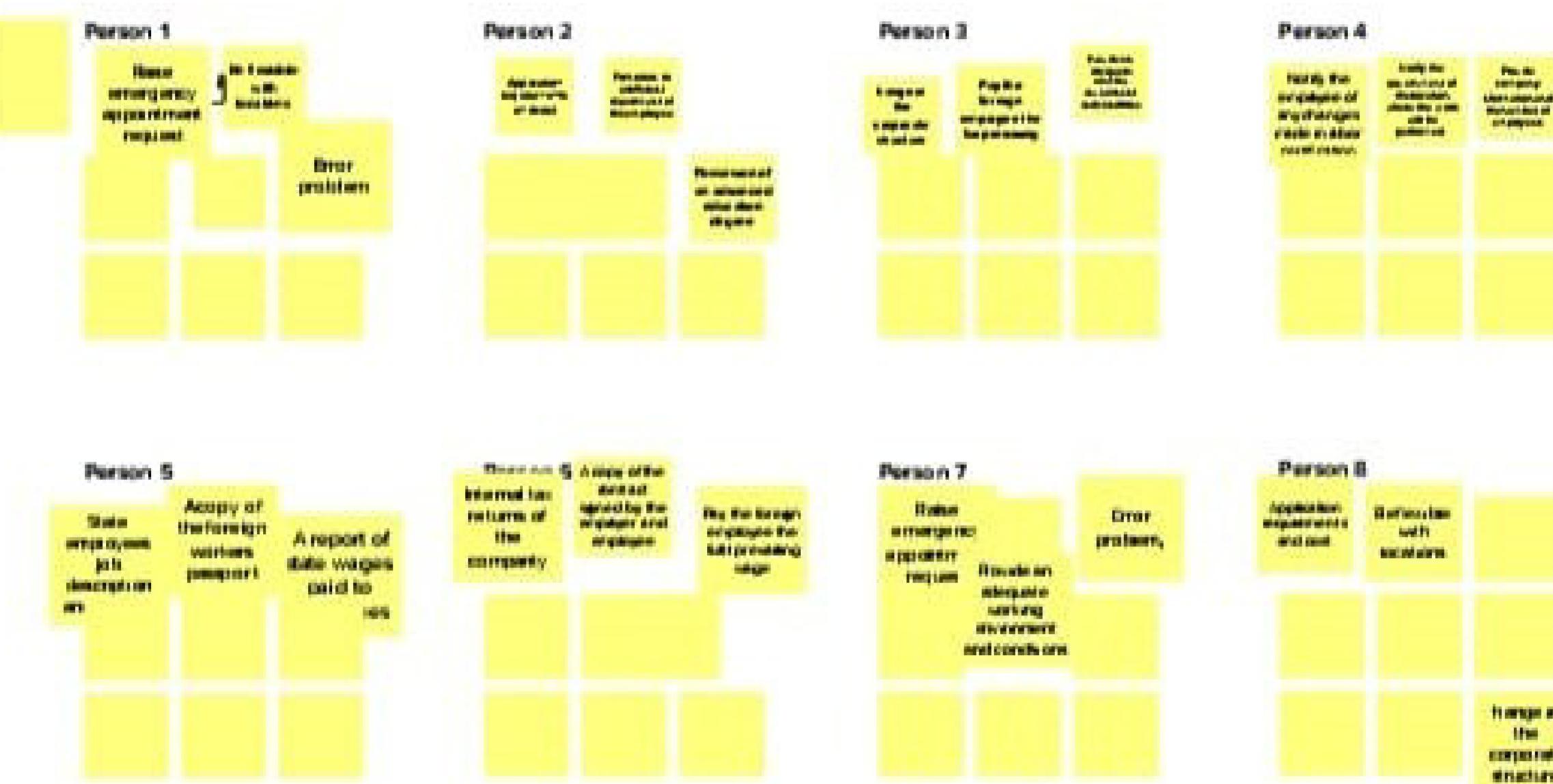
Brainstorm

Write down any ideas that come to mind that address your problem statement.

10 minutes

Tip

You can select a sticky note and hit the pencil (switch to sketch) icon to start drawing!



3.RESULT

1. Data Model

Object Name	Fields in the object	
	FIELD LABEL	DATA TYPE
Passport	Contact Number	Number
	Full Name	Text
	Passport Number	Number
	Permanent Address	Text
	FIELD LABEL	DATA TYPE
Visa slot	Payment Mode	Text
	Card Number	Number
	Transaction id(Auto Number)	Number
	FIELD LABEL	DATA TYPE
	Cancel Transaction	Text
	Location	Text Area
	Visa Slot Number(Master)	Number
	Time	Number
	Passport Number(Master)	Number

2. Activity & Screenshot Milestone - 1:

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. Country :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

Click on sign up after filling these.

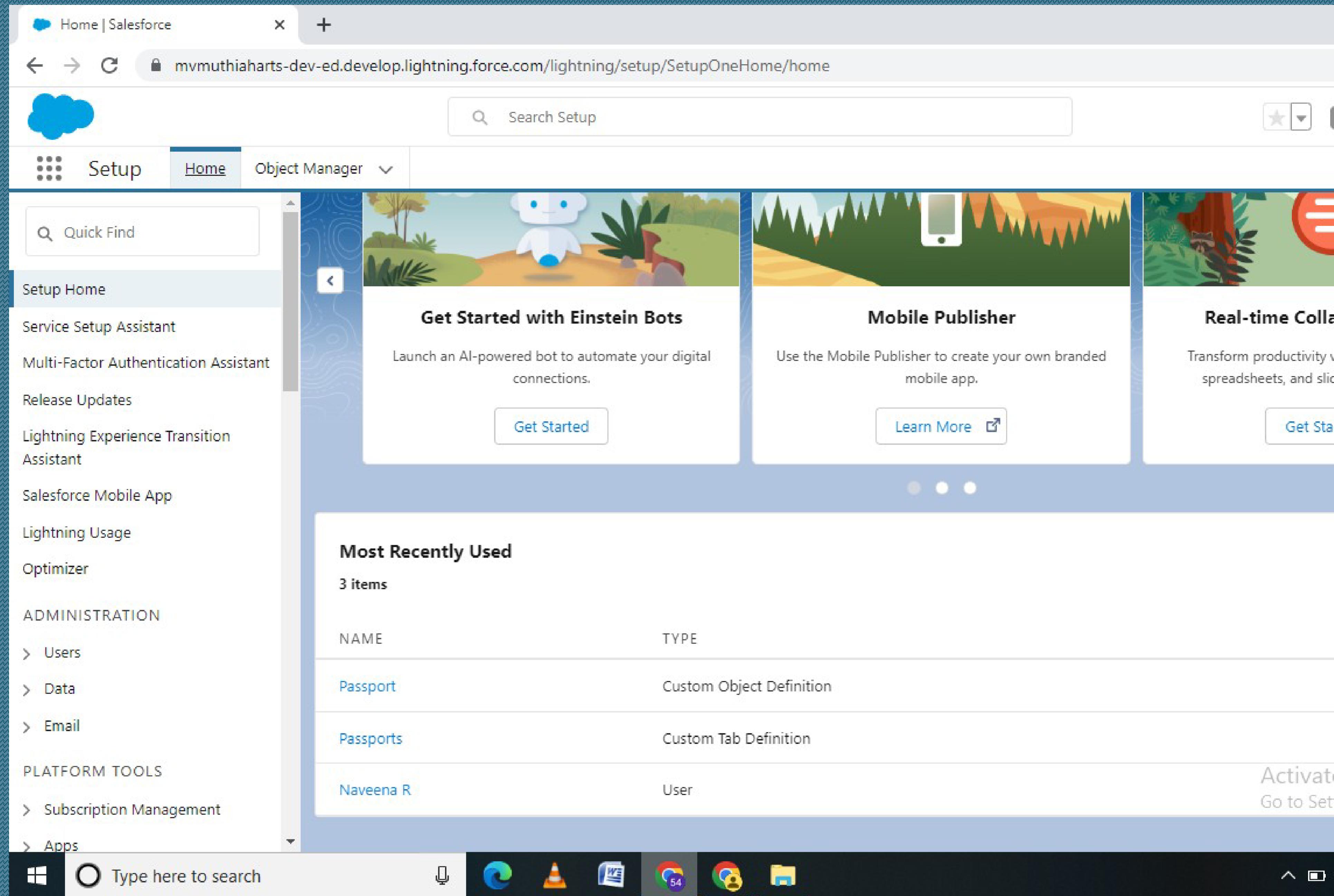
Account Activation

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

<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:

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.

1) 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.
- 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.

Passport | Salesforce

mvmuthiaharts-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003ELUO/FieldsAndRelationships/view

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER
Passport

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 List View Button Layout

Fields & Relationships
5 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Contact Number	Contact_Number_c	Number(18, 0)	
Created By	CreatedById	Lookup(User)	
Last Modified By	LastModifiedById	Lookup(User)	
Owner	OwnerId	Lookup(User,Group)	
Passport Name	Name	Text(80)	

Quick Find New Deleted Fields Field Dependencies

Activate Go to Set

Type here to search

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes the Salesforce logo, a search bar labeled "Search Setup", and a tab for "Object Manager". Below the header, the breadcrumb path "SETUP > OBJECT MANAGER" and the object name "Passport" are displayed. On the left, a sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main content area is titled "Fields & Relationships" and displays a table of six fields. The table columns are "FIELD LABEL", "FIELD NAME", "DATA TYPE", and "CONTROLLING FIELD". The fields listed are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Contact Number	Contact_Number_c	Number(18, 0)	
Created By	CreatedById	Lookup(User)	
Full Name	Full_Name_c	Text(18)	
Last Modified By	LastModifiedById	Lookup(User)	
Owner	OwnerId	Lookup(User,Group)	
Passport Name	Name	Text(80)	

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 Details relation 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.

Salesforce Setup - Visa Slot

Visa Slot | Salesforce

mvmuthaihgovernmentsgirlsco-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager... 00:08 10-04-2023

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Visa Slot

Details

Description

API Name: Visa_Slot_c

Custom: ✓

Singular Label: Visa Slot

Plural Label: Visa Slots

Enable Reports: ✓

Track Activities: ✓

Track Field History: ✓

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Edit Delete

Type here to search

R ENG 00:08 10-04-2023

Salesforce Setup - Passport

Passport | Salesforce

mvmuthiaharts-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01I2w000003ELUO/FieldsAndRelationships/view 00:08 10-04-2023

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Passport

Fields & Relationships

6 Items, Sorted by Field Label

FIELD LABEL FIELD NAME DATA TYPE CONTROLLING FIELD

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Contact Number	Contact_Number_c	Number(18, 0)	
Created By	CreatedById	Lookup(User)	
Full Name	Full_Name_c	Text(18)	
Last Modified By	LastModifiedById	Lookup(User)	
Owner	OwnerId	Lookup(User,Group)	
Passport Name	Name	Text(80)	

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

List View Button Layout

Quick Find New Deleted Fields Field Dependencies

Activate Go to Set

Type here to search

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 firstname and lastname.

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.

The screenshot shows the Salesforce Setup - Users page. The left sidebar is titled 'Setup' and includes sections for 'Users', 'Feature Settings', 'Data.com', 'Prospector', and 'Process Automation'. Under 'Users', 'User Management Settings' is selected, and 'Users' is also listed under it. The main content area is titled 'SETUP Users' and contains a message: 'On this page you can create, view, and manage users.' Below this is a note about mobile access. A table lists users with columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The table shows several users, including 'Chatter Expert', 'R_Nandini', and 'User_Integration', each assigned different profiles like 'Chatter Free User', 'System Administrator', and 'Analytics Cloud Integration User'. At the bottom of the table are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

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 left sidebar has a search bar and navigation links for Development, Org Shape, Security, and Sharing Settings. The main area is titled "Sharing Settings" and lists sharing rules for various objects. The "Sharing Rules" section shows two columns of dropdown menus for "External Access" and "Internal Access". The "Sharing Rules" column includes fields for "vved Cart Document", "Work Order", "Work Plan", "Work Plan Template", "Work Step Template", "Work Type", "Work Type Group", "Location", "Passport", "Payment", and "Reschedule/Cancel". The "Internal Access" column includes fields for "vved Cart Document", "Work Order", "Work Plan", "Work Plan Template", "Work Step Template", "Work Type", "Work Type Group", "Location", "Passport", "Payment", and "Reschedule/Cancel". The "External Access" column includes fields for "vved Cart Document", "Work Order", "Work Plan", "Work Plan Template", "Work Step Template", "Work Type", "Work Type Group", "Location", "Passport", "Payment", and "Reschedule/Cancel". The "Sharing Rules" section also includes "Other Settings" like "Standard Report Visibility" and "Manual User Record Sharing". At the bottom right, there are checkboxes for "Secure guest user permission to record access" and "Require user permission to view record names in lookup fields".

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 Passports with visa locations.

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

New Passports with Visa slots Report

Total Records
3

	Passport: Passport Name	Visa slot: Visa slot Name	Passport: ID	Visa slot: ID
1	NAVEENA R	Naveena	a042w00000z417c	a012w00001BK8I2
2	NIRAN	Niran	a042w00000zN190	a012w00001BL34a
3	Nanthini P	Nanthini P	a042w00000zN0Ly	a012w00001BL34V

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.
- 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.

The screenshot shows a Salesforce Lightning application window titled "Passport with visa location | Sales". The URL in the address bar is <https://mvmuthiaharts-dev-ed.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJkZXNrdG9wRGFzaGJvYXJkcwpkYXNoYm9hcmQjLCJhdHRyaWJ1dGVz>. The top navigation bar includes links for Book my visa, Passports, Visa slots, Payments, Reschedules/Cancels, Reports, Locations, Dashboards, Component, Filter, and a refresh icon.

The main content area displays a table titled "Passports With Visa Locations" with the following data:

Passport: Passport ...	Visa slot: Visa sl...	Passport: ID	Visa slot: ID
Nanthini P	Nanthini P	a042w00000z	a012w00001t
NAVEENA R	Naveena	a042w00000z	a012w00001t
NIRAN	Niran	a042w00000z	a012w00001t

Below the table is a link to "View Report (Passports With Visa Locations)". The bottom of the screen shows a Windows taskbar with icons for File Explorer, Task View, File, and a search bar containing "Type here to search".

4.Tailhead Profile Public URL

Team Lead- <https://trailblazer.me/d/hgahlot3> Team member-

Team member-

Team member-

Conclusion :

In conclusion, a CRM application that helps users to book a visa slot can be a useful tool for both individuals and businesses. This type of application can streamline the visa application process, making it easier and more efficient for users to schedule appointments and submit their application materials.

With features such as automated scheduling, reminder notifications, and document management tools, a CRM application for visa bookings can help users to stay organized and on top of their application process. Additionally, businesses that handle visa applications can benefit from such an application by reducing manual work and improving customer satisfaction. Overall, a CRM application that helps to book visa slots can provide a range of benefits for both individuals and businesses involved in the visa application process, and can be a valuable tool for improving efficiency and customer experience.



THANK YOU