

CRM APPLICATION THAT HELPS TO BOOK A VISA SLOT

PROJECT REPORT TEMPLATE

1. INTRODUCTION

1.1 OVERVIEW:

Project Description:

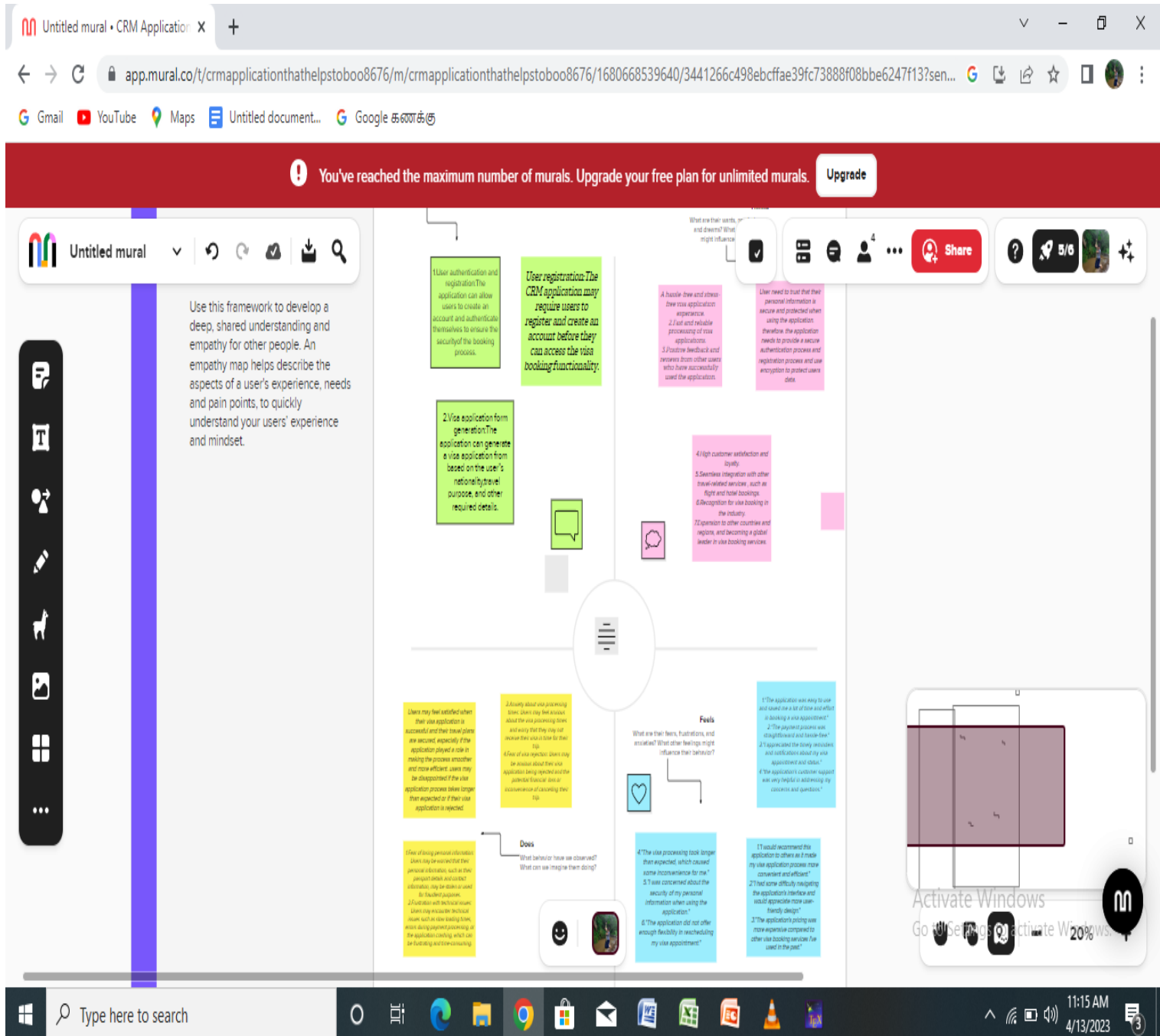
A visa slot management project is a system that is used to track and manage the availability of visa slot, which are appointment that are required for certain visa application. It might be used by a government agency or a visa processing center to schedule and manage appointments with applicants.

1.2 PURPOSE:

- A tourist visa is the most common type used by international travels.
- It allows the bearer to visit the issuing country for tourism purpose.
- A tourist visa does not permit the passenger to legally work or carry out business in the specified country or territory.

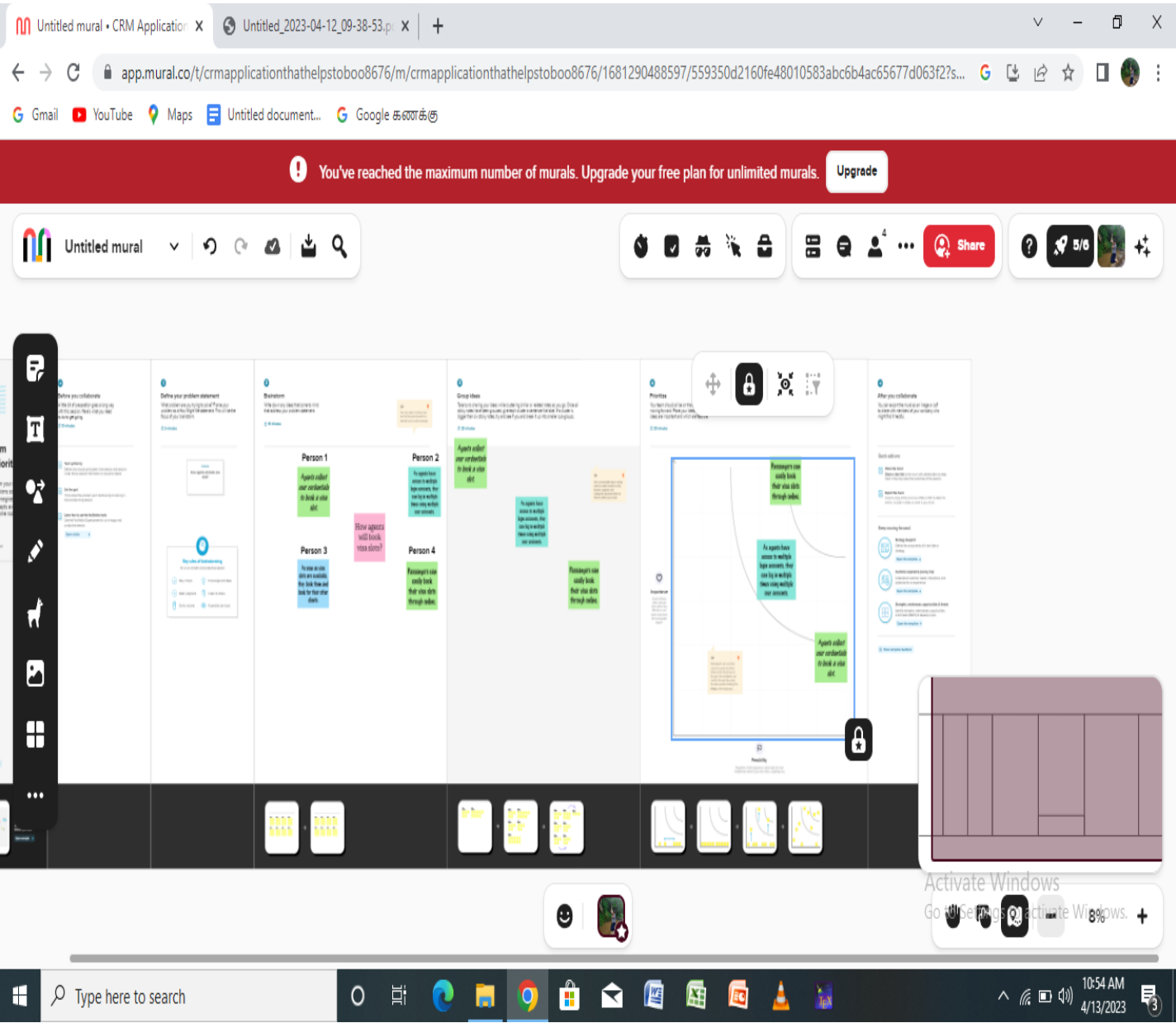
2. PROBLEM DEFINITION & DESIGN THINKING

2.1 EMPATHY MAP:



Creating of Empathy Map.

2.2 Create a Brainstorm Map:



Creation of Brainstorm Map.

3. RESULT

3.1 DATA MODEL:

Object Name	Fields in the Object	
Object-1 Passport	FIELD LABEL	DATA TYPE
	Passport	Text(20)
	Contact Number	Number(13,0)
	Check c	checkbox
	Location	Text(10)
Object-2 Visa	FIELD LABEL	DATA TYPE
	Visa slot number	Text(10) External D
	Passport number	Master-Details(passport)
	Location	Text

3.2 Activity and screenshot:

Activity 1:

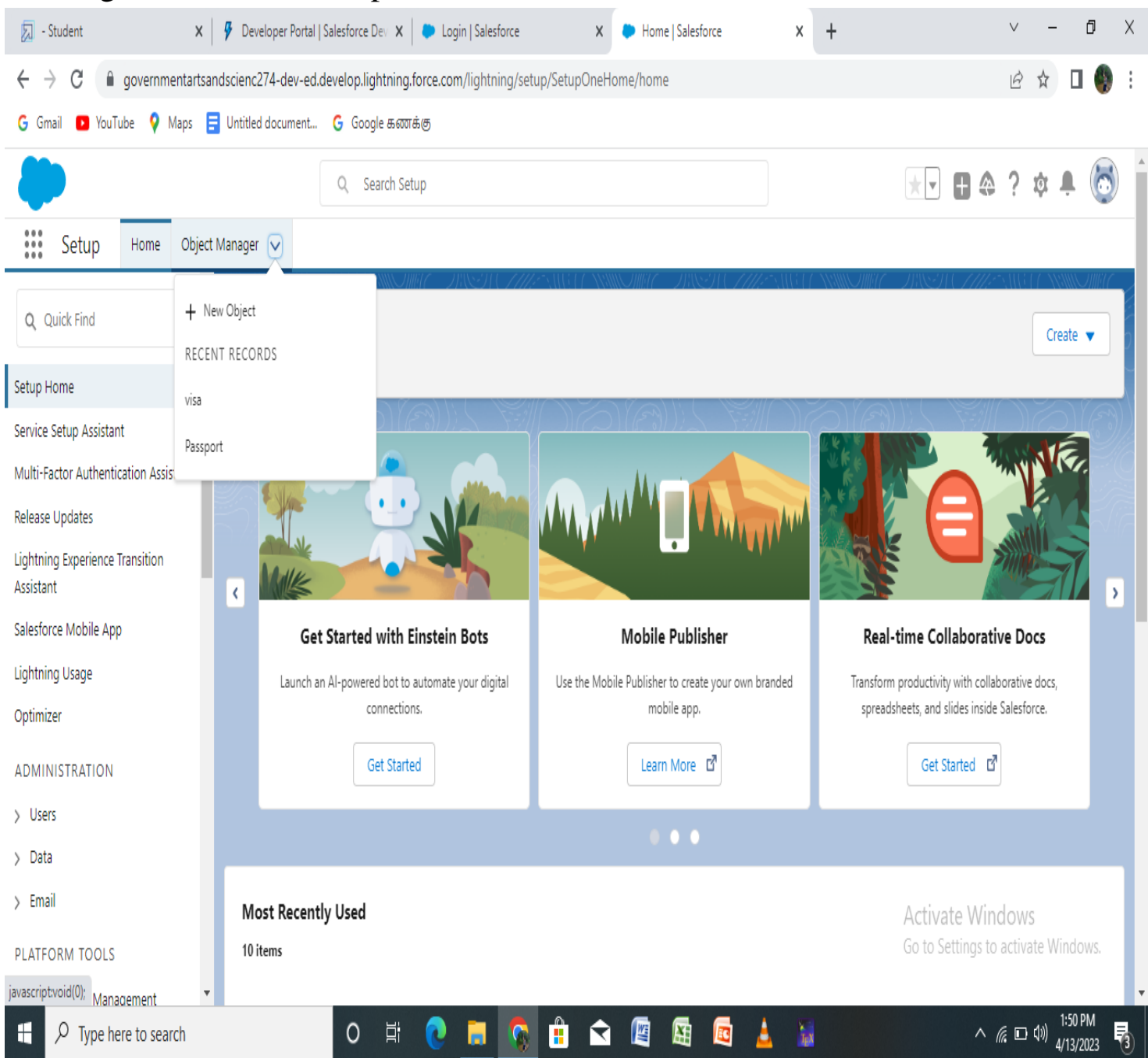
Creating Developer Account

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 :
 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

Creating sales force developer account.



Creating sales forces developer account.



Priya M



Home



Projects



Support



Last Login : 2023-04-13 01:47:55

PROFILE

Name : Priya M

Email: priya0906003@gmail.com

NM_ID: 09EE998A5A4D8C281FE4636D3B537276

CATEGORY : Salesforce Associate

PROJECT TITLE : CRM Application that helps to book a Visa Slot

ROCKET CHAT USERNAME : priya0906003@gmail.com

ROCKET CHAT PASSWORD :

DOWNLOAD ROCKET CHAT :



Activate Windows

Go to Settings to activate Windows.

Smart Internz

Priya M

Home

Projects

Support

Instructions

Courses

Learning Resources

Guided Projects

Assessments

Project Based Experiential Learning

CRM Application that helps to book a Visa Slot

How to Complete Project Based Experiential Learning?

Step-1: Access the Course Videos & Courses.

Go through the courses videos to get started with the technology specific training from scratch, which will help you in building a clear understanding on the concepts which will help you while working on the guided project.

Also complete the courses given in the course section along with the course video & project.

Step-2: Access the Guided Project.

Access the guided project under the guided project tab by clicking the go-to workspace button. This will open the guided project template with step-by-step project activities. The guided project template consists of project milestones (Orange), Project Activities (Red), and Reference

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Go to Settings to activate Windows.

https://naanmudhalvan.smartinternz.com/Student/externships_workspace_info/12687#menu5

Type here to search

1:49 PM

4/13/2023



Home

Projects

Support



Project

CRM Application that helps to book a Visa Slot

ACTIVE


Access Resources

Chat With Mentor

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 [Home](#)

 Projects

? Support

Guided Project

Project Workspace

Chat with Mentor

Project Manual



CRM Application That Helps To Book A Visa Slot

Creation Of Developer Org

+ Objects

- Relationship B/W Objects

+ App

+ User

+ Reports

 Dashboards

CRM Application That Helps To Book A Visa Slot

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.



 Type here to search

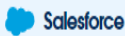


1:49 PM
/13/2023

StudentDeveloper Portal | Salesforce Dev

developer.salesforce.com

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CTRL K

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Developers


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Missed the TDX '23 Keynote?

Good news! We've recorded the keynote and select developer sessions for your reference. Check them out anytime, anywhere.

Watch now

Products


Salesforce 


Marketing Cloud 

Salesforce Developers

Trailblazer.me

Login into access a rich community of Salesforce Developers, get ideas, and find solutions.

Developer Forums 


Salesforce Developer Conference

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https://login.salesforce.com

Type here to search



1:50 PM
4/13/2023





Username

priya0906003@gmail.com

Password

Log In

☐ Remember me

[Forgot Your Password?](#)

[Use Custom Domain](#)

Not a customer?

[Try for Free](#)

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Activate Windows
Go to Settings to activate Windows.

Milestone-2: Objects:

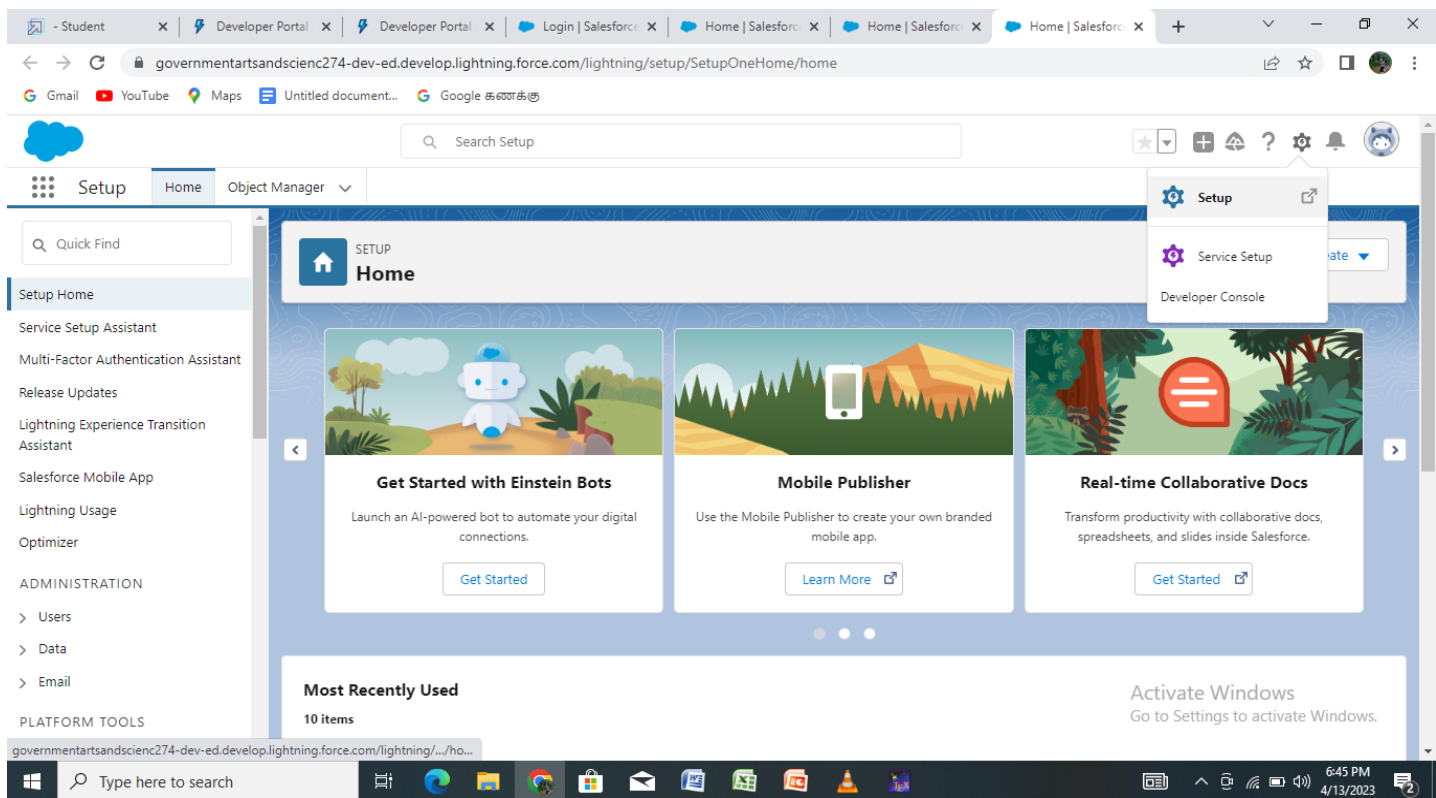
Objects are database tables that permit you to store data that is specific to an organization. Sales force objects are of two types:

- 1) Standard objects.
- 2) custom objects.

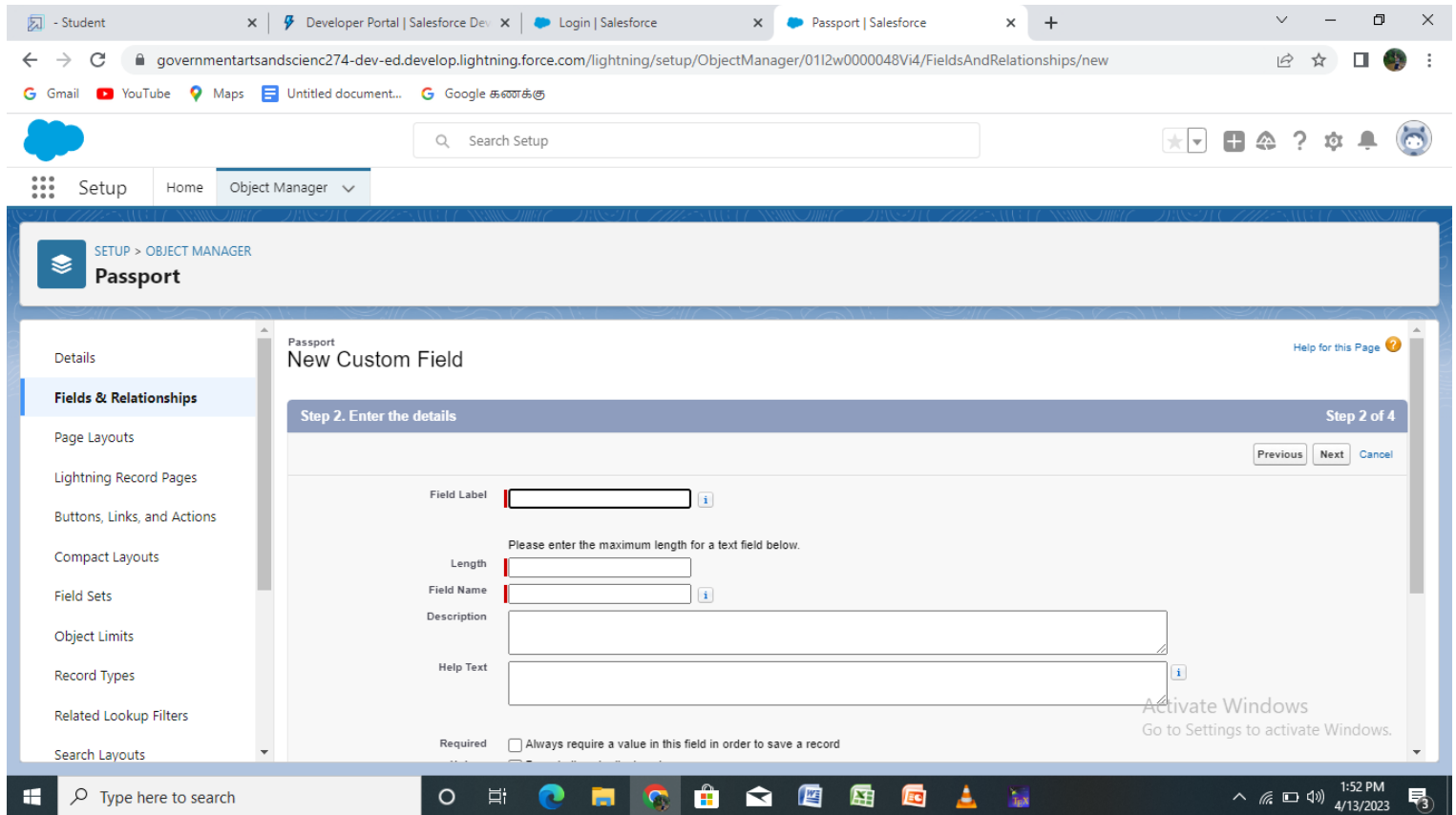
ACTIVITY-1:

Creation of customer object: **PASSPORT**

- 1) Navigate to setup and select object manager.



- 2) At the top of the side there you can find create custom object.



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

Student

Developer Portal | Salesforce Dev

Login | Salesforce

Passport | Salesforce

governmentartsandscienc274-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000048Vi4/FieldsAndRelationships/view

Gmail YouTube Maps Untitled document... Google கணக்கு

Search Setup

Star Plus Home ?

Setup

Home

Object Manager

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

Fields & Relationships

9 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set

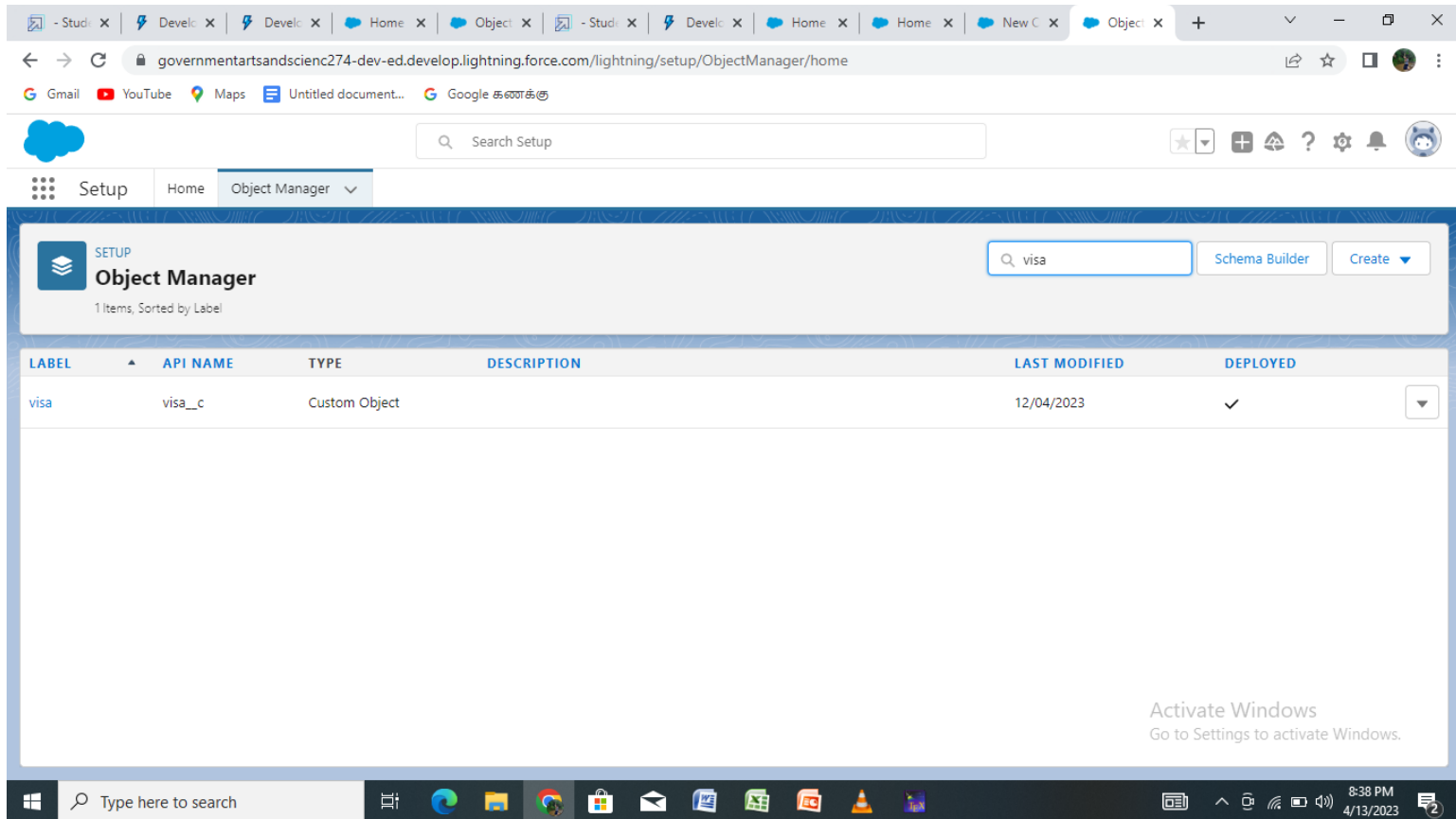
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
check c	check_c__c	Checkbox		
contact number c	contact_number_c__c	Number(13, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Location	Location__c	Text(10)		
Owner	OwnerId	Lookup(User,Group)		✓
Passport	Passport__c	Text(20)		

Activate Windows
Go to Settings to activate

Create a passport details.

Milestone-3:

Relationship between Object



The screenshot displays the Salesforce Lightning Object Manager interface. The browser address bar shows the URL: `governmentartsandscienc274-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home`. The page header includes a search bar with the text "Search Setup" and a navigation menu with "Setup", "Home", and "Object Manager". The main content area is titled "Object Manager" and shows "1 Items, Sorted by Label". A table lists the objects, with one entry visible:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
visa	visa__c	Custom Object		12/04/2023	✓

At the bottom of the interface, there is a Windows taskbar with various application icons and a system tray showing the time as 8:38 PM on 4/13/2023. An "Activate Windows" watermark is visible in the bottom right corner of the application window.

StudentDeveloper Portal | Salesforce DevHome | Salesforcevisa | Salesforce

governmentartsandscienc274-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000048WHY/FieldsAndRelationships/view

GmailYouTubeMapsUntitled document...Google கணக்கு

Search Setup

SetupHomeObject Manager

SETUP > OBJECT MANAGERvisa

DetailsFields & RelationshipsPage LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup Filters

Fields & Relationships

6 Items, Sorted by Field Label

Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
contact number c	contact_number_c__c	Number(13, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Passport Number	Passport_Number__c	Master-Detail(Passport)		✓
Visa Name	Name	Text(80)		✓
visa slot number	visa_slot_number__c	Text(10) (External ID)		✓

Activate WindowsGo to Settings to activate Windows.

https://governmentartsandscienc274-dev-ed.develop.lightning.force.com/one/on...Type here to search31°C10:45 AM4/14/2023

Browser tabs: - Student, Developer Portal | Salesforce, Login | Salesforce, Passport | Salesforce, visa | Salesforce

Address bar: governmentartsandscienc274-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000048WHY/Details/view

Search Setup

Setup > Home > Object Manager

SETUP > OBJECT MANAGER
visa

Details

Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters

Details

Description

API Name
visa__c

Custom
✓

Singular Label
visa

Plural Label
Visas

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete

Activate Windows
Go to Settings to activate Windows.

Windows taskbar: Type here to search, 1:53 PM, 4/13/2023

Creating a fields & Relationship in visa.

MILESTONE: 4-APP

Activity: Create of App

Create a app manager.

The screenshot shows the 'New Lightning App' setup interface in the Salesforce Lightning App Manager. The browser tabs at the top include 'Student', 'Developer Portal', 'Login | Salesforce', 'Passport | Salesforce', 'Object Manager', and 'App Manager | S...'. The address bar shows the URL: `governmentartsandscienc274-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home`. The page title is 'New Lightning App' and the sub-header is 'App Details & Branding'. Below this, a prompt says: 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.'

The setup is divided into two main sections: 'App Details' and 'App Branding'.

App Details:

- * App Name:**
- * Developer Name:**
- Description:**

App Branding:

- Image:**
- Primary Color Hex Value:**

At the bottom of the form, there is a progress bar with four steps, the first of which is active. A 'Next' button is located at the bottom right of the form.

Below the form, a table lists the app's components:

Component ID	Component Name	Component Label	Component Description	Created Date	Created By	Status
3	App Launcher	AppLauncher	App Launcher tabs	15/03/2023, 2:44 pm	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your i...	15/03/2023, 2:46 pm	Lightning	✓

The Windows taskbar at the bottom shows the time as 2:12 PM on 4/13/2023.

Creation of the App.

MILESTONE: 5 USER

Activity-1:

Creation of user:

The screenshot shows the Salesforce Setup interface for creating a new user. The browser tabs at the top include 'Student', 'Developer Portal', 'Login | Salesforce', 'Passport | Salesforce', 'Object Manager', and 'Users | Salesforce'. The address bar shows the URL: `governmentartsandscienc274-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUs...`. The left sidebar contains a search bar with 'users' and a list of navigation items: 'Users' (selected), 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Feature Settings', 'Data.com', and 'Prospector Users'. The main content area is titled 'New User' and contains a 'User Edit' form. The form has three tabs: 'General Information', 'Advanced', and 'Permissions'. The 'General Information' tab is active, showing fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. The Role is set to '<None Specified>', User License is 'Chatter External', Profile is 'Chatter External User', and Active is checked. The bottom of the screen shows the Windows taskbar with the search bar and various application icons.

governmentartsandscienc274-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FretURL%3D%252F005%253FisUs...

Search Setup

Setup Home Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

SETUP Users

New User

User Edit

Save Save & New Cancel

General Information

First Name

Last Name

Alias

Email

Username

Nickname

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

Activate Windows

Go to Settings to activate Windows.

2:16 PM 4/13/2023

Users

Division

Site.com Contributor User

Site.com Publisher User

WDC User

Data.com User Type

Data.com Monthly Addition Limit

Accessibility Mode (Classic Only)

High-Contrast Palette on Charts

Load Lightning Pages While Scrolling

Debug Mode

Quick Access Menu

Salesforce CRM Content User

Receive Salesforce CRM Content Email Alerts

Receive Salesforce CRM Content Alerts as Daily Digest

Allow Forecasting

Call Center

Activity: 2

OWD: Organization wide default settings.

Student

Developer Portal

Login | Salesforce

Passport | Salesforce

Passport | Salesforce

Object Manager

Sharing Settings

governmentartsandscienc274-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/home

GmailYouTubeMapsUntitled document...Google கணக்கு

Cloud

Search Setup

SetupHomeObject Manager

sharing

Security

Sharing Settings

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

SETUP

Sharing Settings

Help for this Page

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

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	✓

Organization-Wide Defaults Help

Activate Windows
Go to Settings to activate Windows.

https://governmentartsandscienc274-dev-ed.develop.lightning.force.com/one/one.app#/setup/SecuritySharing/home

Type here to search

Taskbar icons

2:18 PM
4/13/2023

Browser tabs: - Student, Developer Portal, Login | Salesforce, Passport | Salesforce, Passport | Salesforce, Object Manager, Sharing Settings.

Address bar: governmentartsandscienc274-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/home

Search Setup

Setup Home Object Manager

Q sharing

Security

Sharing Settings

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

Sharing Settings

Service Territory	Public Read/Write	Private	✓
Shift	Private	Private	✓
Streaming Channel	Public Read/Write	Private	✓
User Provisioning Request	Private	Private	✓
Web Cart Document	Private	Private	✓
Work Order	Private	Private	✓
Work Plan	Private	Private	✓
Work Plan Template	Private	Private	✓
Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Passport	Public Read/Write	Private	✓
visa	Controlled by Parent	Controlled by Parent	

Other Settings

Manager Groups

Activate Windows
Go to Settings to activate Windows.

Type here to search

2:20 PM 4/13/2023

Creation of the Users.

MILESTONE-6 REPORTS:

Activity-1

Create of report:

The screenshot shows the Salesforce Lightning Usage App interface. The browser tabs include Student, Developer Portal, Login | Salesforce, Passport | Salesforce, Object Manager, and Reports | Salesforce. The address bar shows the URL: `governmentartsandscienc274-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru`. The page title is "Lightning Usage App" with a search bar and navigation links for Lightning Usage, Passports, and Reports. The Reports section is active, showing a list of recent reports.

Reports

Recent

2 items

Search recent reports...

New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Passports with Visas Report		Private Reports	Priya M	12/4/2023, 9:49 am	
Created by Me	Copy of New Passports with Visas Report		Private Reports	Priya M	12/4/2023, 9:44 am	
Private Reports						
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						

Activate Windows
Go to Settings to activate Windows.

javascript:void(0); 25

Type here to search

2:21 PM
4/13/2023

Browser tabs: Student, Developer Portal, Login | Salesforce, Report Builder | S

Address bar: governmentartsandscienc274-dev-ed.develop.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOiJyZXBvcnRzOnJlcG9ydEJ1aWxkZXIiLCJhdHRyaWJ1dGVzIjp7In...

Search bar: Search...

Navigation: Lightning Usage App, Lightning Usage, Passports, Reports

Create Report

Category

- Recently Used
- All**
- Accounts & Contacts
- Opportunities
- Customer Support Reports
- Leads
- Campaigns
- Activities

Select a Report Type

Search Report Types...

Report Type Name	Category
Accounts	Standard
Contacts & Accounts	Standard
Accounts with Partners	Standard
Account with Account Teams	Standard
Accounts with Contact Roles	Standard
Accounts with Assets	Standard
Contacts with Accate	Standard

Activate Windows
Go to Settings to activate Windows.

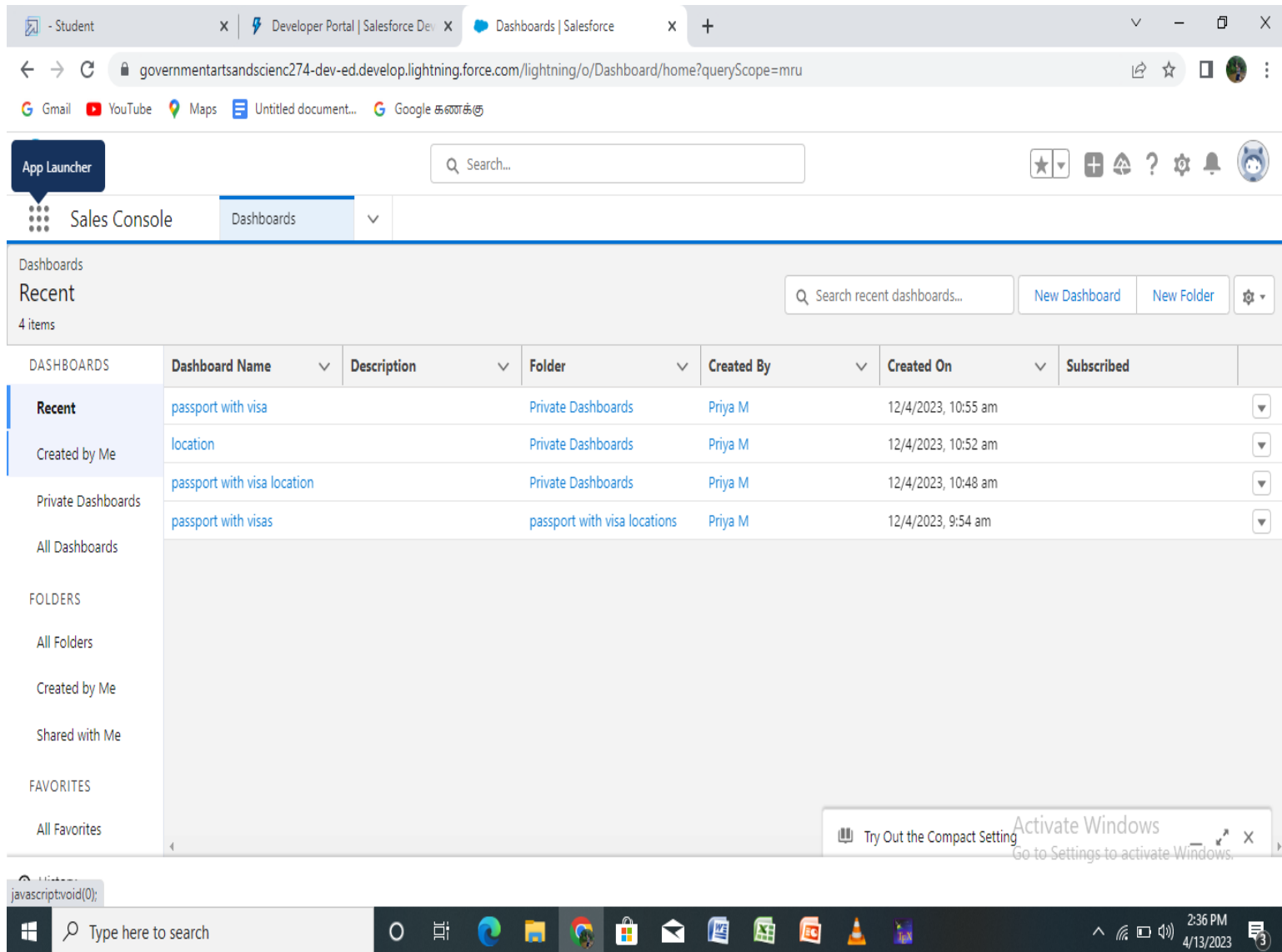
Windows taskbar: Type here to search, 2:23 PM 4/13/2023

Creation of the Reports.

MILESTONE-7 Dashboards:

Activity

Create of Dashboard:



The screenshot shows the Salesforce Dashboards interface. The top navigation bar includes the App Launcher, a search bar, and various utility icons. The left sidebar contains navigation options for Sales Console, Dashboards, and Folders. The main content area displays a list of recent dashboards with columns for Dashboard Name, Description, Folder, Created By, Created On, and Subscribed. The list includes four items: 'passport with visa', 'location', 'passport with visa location', and 'passport with visas', all created by Priya M on 12/4/2023.

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	passport with visa		Private Dashboards	Priya M	12/4/2023, 10:55 am	
Created by Me	location		Private Dashboards	Priya M	12/4/2023, 10:52 am	
Private Dashboards	passport with visa location		Private Dashboards	Priya M	12/4/2023, 10:48 am	
All Dashboards	passport with visas		passport with visa locations	Priya M	12/4/2023, 9:54 am	

At the bottom of the screen, there is a Windows taskbar with the search bar and various application icons. A notification for 'Activate Windows' is visible in the bottom right corner.

Creation of the Dashboard.

4. TRAILHEAD PROFILE PUBLIC URL:

TEAM LEAD –<https://trailblazer.me/id/pmani206>

TEAM MEMBER 1-<https://trailblazer.me/id>

TEAM MEMBER 2-<https://trailblazer.me/id/ppratheeksha>

TEAM MEMBER 3-<https://trailblazer.me/id/rwari7>

5. Advantages & Disadvantage:

Advantages:

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

Convenient and Hassle free:

- One of the top reasons why people choose travel agents over self planning is definitely convenience.
- All you have to do is to give them a call or just drop them a text regarding all your preferences and you are good to go.

Time Saving:

- For many of us time is money and this is where travel agents are our saviors.
- You don't have to spend hours researching best travel destinations.

Disadvantages:

- ✓ Internet connection problem is there.
- ✓ Poor connection leads to trouble and anxiety.
- ✓ Poor communication.
- ✓ Lack of leadership.
- ✓ Burdensome data entry.
- ✓ Sometimes you need to provide the paper work documents time and again for the processing, if will make you annoying.
- ✓ You may not have a suitable service from your agencies.
- ✓ If you don't have proper communication to the agency, you may have hard time to get complete the process.

6. APPLICATION:

VISA application fee online CGI Federal portal by creating an account:

- Head back to the Computer-generated imagery (CGI) Federal portal.
- Login to the portal with the details you use to log in to your account.
- If you have not already scheduled your appointment, select Schedule an appointment on the top left side.
- Provide the necessary details during the application. Be sure to check your details before continuing.

7. CONCLUSION:

- **CRM** are about upping sales, saving time and money, and giving customers a service that they remember for all the right reasons.
- Whatever your business is, whatever its size, you can rest assured an appropriate CRM solution exists. There's never been a better time to get into CRM land.

8.FUTURE SCOPE:

- **One** of the main reasons for the growth of CRM is accessibility. Business owners need real-time access to the latest customer data, and cloud-based CRM systems are becoming a one-stop solution for this need.

THANK YOU.....

