

PROJECT REPORT

CRM APPLICATION THAT HELPS TO BOOK A VISA SLOT

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

submitted by

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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 appointments that are required for certain visa applications. It might be used by a government agency or a visa processing centre to schedule and manage appointments 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 verifications

Problem definition and design thinking:

Empathy map:

Build empathy

The information you add here should be representative of the observations and research you've done about your users.



Ideation And Brainstorming Map:

Empathy map:

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!

Person 1

Besides private messages, the platform enables you to create channels for specific projects, teams, and departments. Each team member can also share documents, start a thread, and pin important messages on the channel.

In the space of just a few years, CRMs have evolved immensely. Approachable and fun rather than boring, implement, and pay for, they've morphed from those sales members who rarely get go software for businesses of all shapes and sizes.

Yes, they're still mainly designed for sales, marketing, and service teams. But now they do a dizzying number of other things too. Like help users manage relationships between team members, vendors, partners, and collaborators.

Person 2

A CRM system manages all your contacts. It helps you find and sort contact information in such a way that everyone can access it. This tool is always used to track the status of leads, contacts, and sales. It also helps you track the status of leads, contacts, and sales. It also helps you track the status of leads, contacts, and sales.

Marketing and sales teams use CRM systems to track leads, contacts, and sales. They use it to track the status of leads, contacts, and sales. They use it to track the status of leads, contacts, and sales. They use it to track the status of leads, contacts, and sales.

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Person 3

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Person 4

A CRM system enables you to track leads, contacts, and sales. It helps you find and sort contact information in such a way that everyone can access it. This tool is always used to track the status of leads, contacts, and sales.

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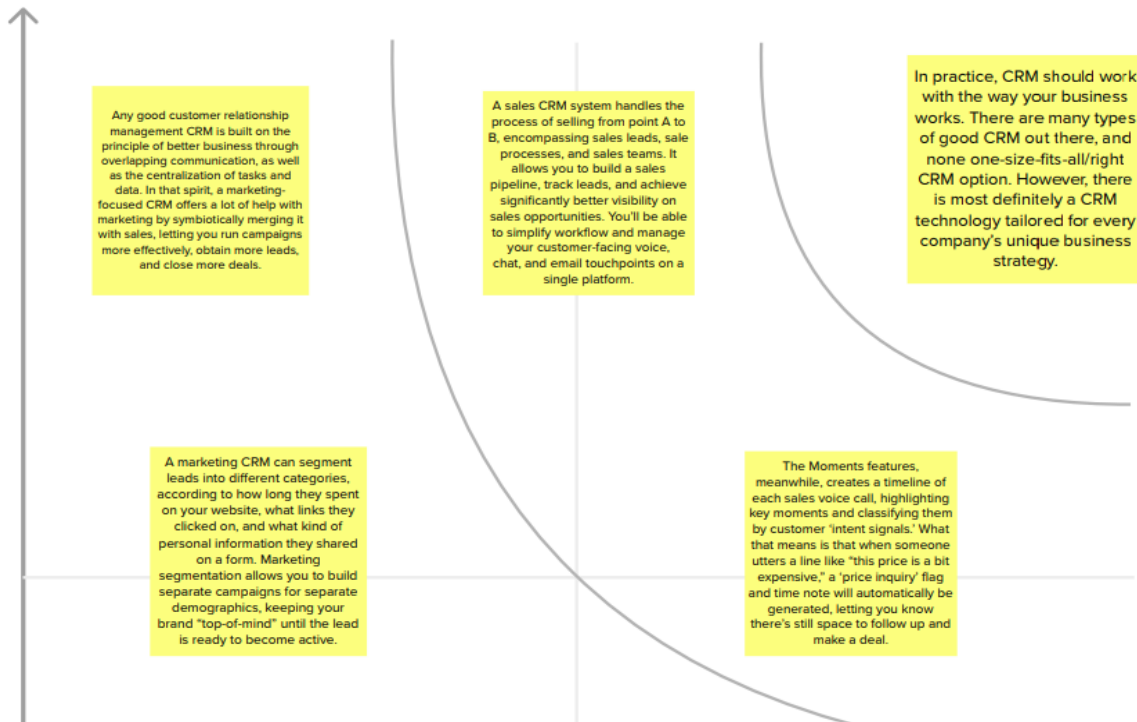
Prioritize

Your team should all be on the same page about what's important moving forward. Place your ideas on this grid to determine which ideas are important and which are feasible.

🕒 20 minutes

TIP

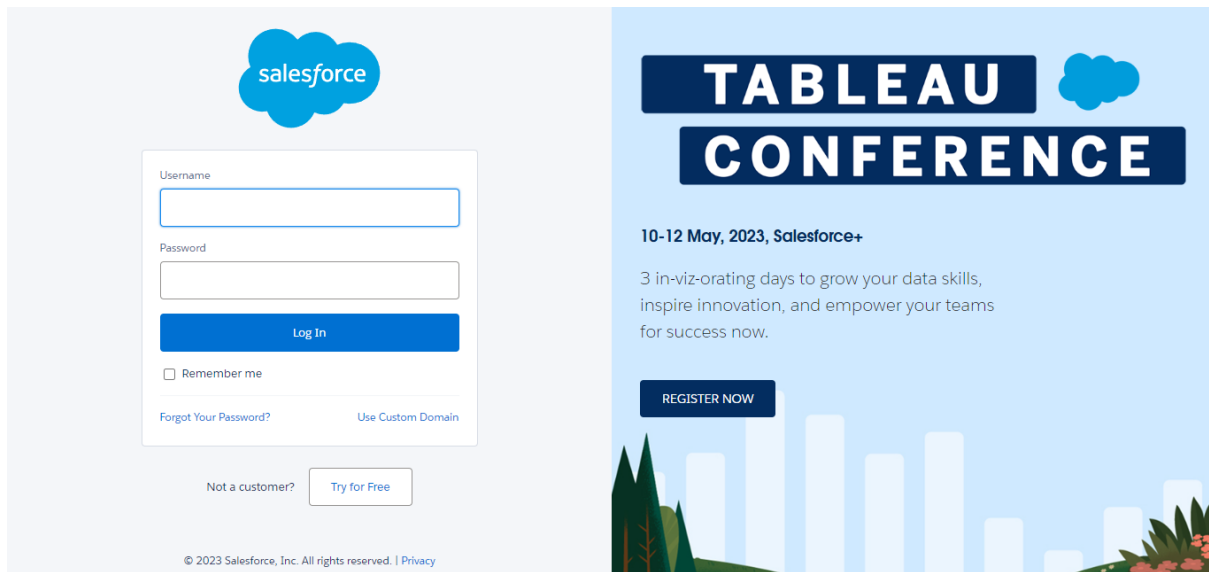
Participants can use their cursors to point at where sticky notes should go on the grid. The facilitator can confirm the spot by using the laser pointer holding the **H** key on the keyboard.



ACTIVITY AND SCREENSHOTS

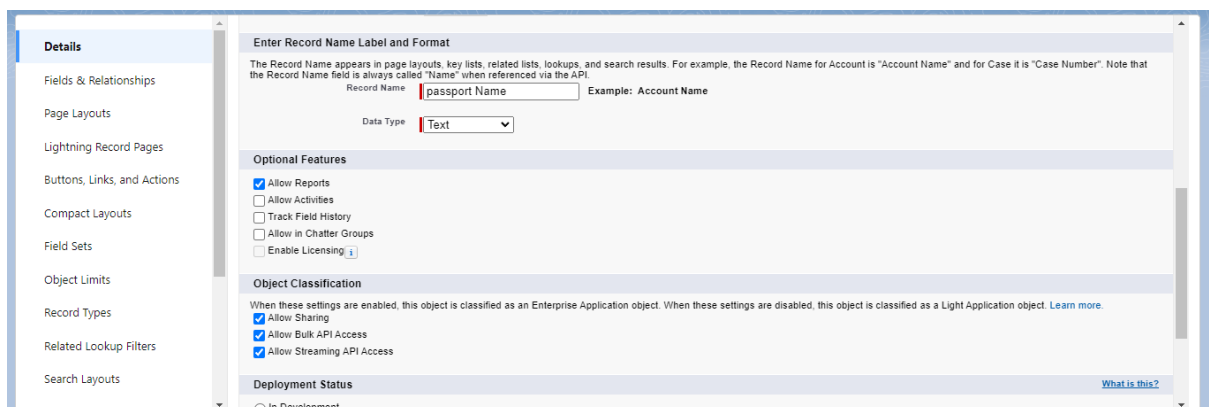
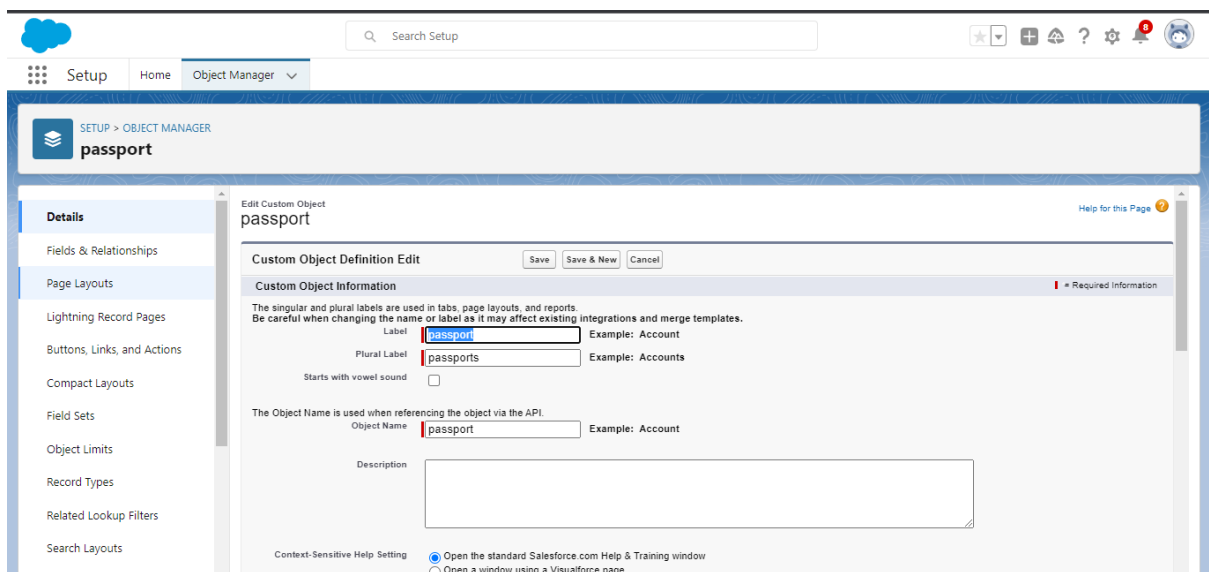
1. Creation of Salesforce platform:

Go to Developer.salesforce.com and click on sign up. Enter our Detail as name, Email, Role, Company etc., Email is send 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.



2. Creation of custom object: Passport

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



Deployment Status

☐ In Development
 ☒ Deployed

[What is this?](#)

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

☒ Allow Search

Objects involved in book a Visa Slot, Payment, Reschedule/Cancel
create in this type.

Visa slot:

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

List View Button Layout

Edit Custom Object

visa slot

[Help for this Page](#)

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label

visa slot

Example: Account

Plural Label

visa slot

Example: Accounts

Starts with vowel sound

☐

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

Object Name

visa_slot

Example: Account

Description

Context-Sensitive Help Setting

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

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

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name

visa slot Name

Example: Account Name

Data Type

Text

Optional Features

☒ Allow Reports
 ☐ Allow Activities
 ☐ Track Field History
 ☐ Allow in Chatter Groups
 ☐ Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

☒ Allow Sharing
 ☒ Allow Bulk API Access
 ☒ Allow Streaming API Access

Deployment Status

☐ In Development
 ☒ Deployed

[What is this?](#)

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

☒ Allow Search

payment:

The screenshot shows the Salesforce Setup interface for a custom object named 'payment'. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various configuration options under 'Details', such as 'Fields & Relationships', 'Page Layouts', and 'Lightning Record Pages'. The main content area is titled 'Edit Custom Object payment' and contains the 'Custom Object Definition Edit' form. This form includes sections for 'Custom Object Information' (with fields for Label, Plural Label, and Object Name), a 'Description' text area, and 'Context-Sensitive Help Setting' options. The 'Label' and 'Plural Label' fields are marked as required.

Setup > OBJECT MANAGER
payment

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

Edit Custom Object
payment

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information Required Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

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

This screenshot shows the 'Enter Record Name Label and Format' section of the 'payment' custom object setup. It includes a 'Record Name' field (marked as required) and a 'Data Type' dropdown menu. Below this are sections for 'Optional Features' (with checkboxes for 'Allow Reports', 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Licensing'), 'Object Classification' (with checkboxes for 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access'), and 'Deployment Status' (with radio buttons for 'In Development' and 'Deployed'). A 'Search Status' section at the bottom allows users to enable search for this object type.

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

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name Example: Account Name

Data Type

Optional Features

- ☒ Allow Reports
- ☐ Allow Activities
- ☐ Track Field History
- ☐ Allow in Chatter Groups
- ☐ Enable Licensing [i](#)

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

- ☒ Allow Sharing
- ☒ Allow Bulk API Access
- ☒ Allow Streaming API Access

Deployment Status [What is this?](#)

- ☐ In Development
- ☒ Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

- ☒ Allow Search

Save Save & New Cancel

reschedule / cancel:

The image shows two screenshots of the Salesforce Setup interface, specifically the 'Object Manager' section for a custom object named 'Reschedule'.

Top Screenshot: Custom Object Definition Edit

- Custom Object Information:**
 - Label:** Reschedule (Example: Account)
 - Plural Label:** Reschedules (Example: Accounts)
 - Starts with vowel sound:** ☐
- The Object Name is used when referencing the object via the API:**
 - Object Name:** Reschedule (Example: Account)
- Description:** (Empty text area)
- Context-Sensitive Help Setting:**
 - ☒ Open the standard Salesforce.com Help & Training window
 - ☐ Open a window using a Visualforce page

Bottom Screenshot: Enter Record Name Label and Format

- Record Name:** Reschedule Name (Example: Account Name)
- Data Type:** Text
- Optional Features:**
 - ☒ Allow Reports
 - ☐ Allow Activities
 - ☐ Track Field History
 - ☐ Allow in Chatter Groups
 - ☐ Enable Licensing
- Object Classification:**
 - When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)
 - ☒ Allow Sharing
 - ☒ Allow Bulk API Access
 - ☒ Allow Streaming API Access
- Deployment Status:**
 - ☐ In Development

Search Status:

- When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)
- ☒ Allow Search

Buttons: Save, Save & New, Cancel

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:

Setup

Home

Object Manager

Search Setup

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

visa slot

New Custom Field

Help for this Page

Step 2. Enter the details

Step 2 of 4

PreviousNextCancel

Field Label

Contact Number

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length

18

Decimal Places

0

Number of digits to the left of the decimal point

Number of digits to the right of the decimal point

Field Name

Contact_Number

Description

Help Text

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

visa slot

New Custom Field

Help for this Page

Step 3. Establish field-level security

Step 3 of 4

PreviousNextCancel

Field Label

Contact Number

Data Type

Number

Field Name

Contact_Number

Description

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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

visa slot

New Custom Field

Help for this Page

Step 4. Add to page layouts

Step 4 of 4

PreviousSave & NewSaveCancel

Field Label

Contact Number

Data Type

Number

Field Name

Contact_Number

Description

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

☒ Add Field

Page Layout Name

visa slot Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

PreviousSave & NewSaveCancel

Full Name:

Setup

Home

Object Manager

Search Setup

Star

Plus

Refresh

Help

Settings

Notifications

Profile

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

Edit passport Custom Field

Full Name

Help for this Page

Custom Field Definition Edit

Change Field Type

Save

Cancel

Field Information

Field Label

Full Name

Data Type

Text

Field Name

Full_Name

Description

Help Text

Data Owner

User

Field Usage

--None--

Data Sensitivity Level

--None--

Compliance Categorization

Available

PII

HIPAA

GDPR

PCI

Chosen

Compliance Categorization

Available

PII

HIPAA

GDPR

PCI

Chosen

General Options

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

Default Value

Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes ("the_text"). Include numbers without quotes (25), show percentages as decimals (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mdt.RecordAPINameField__c

Text Options

Length

10

Change Field Type

Save

Cancel

Passport Number:

Setup

Home

Object Manager

Search Setup

Star

Plus

Shield

Help

Settings

Notifications

User Avatar

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

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

Edit passport Custom Field

Passport Number

Help for this Page

Custom Field Definition Edit

Change Field Type

Save

Cancel

Field Information

Field Label

Passport Number

Data Type

Text

Field Name

Passport_Number

Description

Help Text

Data Owner

User

Field Usage

--None--

Data Sensitivity Level

--None--

Compliance Categorization

Available

Chosen

Compliance Categorization

Available

Chosen

General Options

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

Default Value

Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes: ("the_text"), include numbers without quotes (42), show percentages as decimals (0.10), and express date calculations in the standard format: Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mdt.RecordAPIName.Field__c

Text Options

Length

10

Change Field Type

Save

Cancel

Parmanent Address:

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

Edit passport Custom Field
Payment Address

Custom Field Definition Edit

Change Field Type Save Cancel

Field Information

Field Label Payment Address Data Type Text

Field Name Payment_Address

Description

Help Text

Data Owner User

Field Usage --None--

Data Sensitivity Level --None--

Compliance Categorization

Available PII HIPAA GDPR PCI

Chosen

General Options

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

Default Value [Show Formula Editor](#)

Use formula syntax: Enclose text and picklist value API names in double quotes: ("The text"), include numbers without quotes: (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__cmet.RecordAPIName.Field__c

Text Options

Length 10

Change Field Type Save Cancel

Creation of fields on the custom Object: **Visa Slot**

Location:

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

List View Button Layout

Edit visa slot Custom Field
Location

Custom Field Definition Edit

Change Field Type Save Cancel

Field Information

Field Label Location Data Type Text

Field Name Location

Description

Help Text

Data Owner User

Field Usage --None--

Data Sensitivity Level --None--

Compliance Categorization

Available Chosen

PII HIPAA GDPR PCI

Compliance Categorization

Available Chosen

PII HIPAA GDPR PCI

General Options

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

Default Value [Show Formula Editor](#)

Use formula syntax: Enclose text and picklist value API names in double quotes ("the_text"). Include numbers without quotes (25), show percentages as decimals (0.10), and express date calculations in the standard format: {Today() + 7}. To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mdt.RecordAPIName.Field__c

Text Options

Length 10

Change Field Type Save Cancel

Select our Object from the selection has Passport and select option held and Relationship. Select our data type as text go to the next page enter the field labe has Location 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 an profile and select option and save it. The visa slot Field are create like this type

Time:

Setup

Home

Object Manager

Search Setup

Star

Plus

Refresh

Help

Settings

Notifications

Avatar

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

List View Button Layout

Edit visa slot Custom Field

Passport Number (Master)

Help for this Page

Custom Field Definition Edit

Change Field Type

Save

Cancel

Field Information

Field Label

Passport Number (Master)

Data Type

Number

Field Name

Passport_Number_Master

Description

Help Text

Data Owner

User

Field Usage

--None--

Data Sensitivity Level

--None--

Compliance Categorization

Available

PII

HIPAA

GDPR

PCI

Chosen

Compliance Categorization

Available

PII

HIPAA

GDPR

PCI

Chosen

General Options

Required

☒ Always require a value in this field in order to save a record

Unique

☐ Do not allow duplicate values

External ID

☒ Set this field as the unique record identifier from an external system

AI Prediction

☐ Use this field to store AI prediction scores

Default Value

Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes ("the_text"), include numbers without quotes (42), show percentages as decimals (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mdt.RecordAPINameField__c

Number Options

Length

18

Decimal Places

0

Change Field Type

Save

Cancel

Visa Slot Number:

Setup Home Object Manager

Search Setup

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

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

Edit visa slot Custom Field
Visa slot number

Custom Field Definition Edit

Change Field Type Save Cancel

Field Information

Field Label Visa slot number Data Type Text

Field Name Visa_slot_number

Description

Help Text

Data Owner User

Field Usage --None--

Data Sensitivity Level --None--

Compliance Categorization

Available PII HIPAA GDPR PCI

Chosen

Compliance Categorization

Available PII HIPAA GDPR PCI

Chosen

General Options

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

Default Value [Show Formula Editor](#)

Use formula syntax: Enclose text and picklist value API names in double quotes ("the_text"). Include numbers without quotes (25), show percentages as decimals (0.10), and express date calculations in the standard format: Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mdt.RecordAPIName.Field__c

Text Options

Length 10

Change Field Type Save Cancel

Creation Of Field On Custum Object: **Payment**

Payment Mode:

Setup

Home

Object Manager

Search Setup

Star

Plus

Refresh

Help

Settings

Notifications

User Avatar

payment

SETUP > OBJECT MANAGER

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

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

Custom Field Definition Edit

Change Field Type

Save

Cancel

Field Information

Field Label

Payment Mode

Data Type

Text

Field Name

Payment_Mode

Description

Help Text

Data Owner

User

Field Usage

--None--

Data Sensitivity Level

--None--

Compliance Categorization

Available

PII

HIPAA

GDPR

PCI

Chosen

Compliance Categorization

Available

PII

HIPAA

GDPR

PCI

Chosen

General Options

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

Default Value

Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes: ("the_text"). Include numbers without quotes: (25), show percentages as decimals: (3.14), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__with_RecordName.Field__c

Text Options

Length

10

Change Field Type

Save

Cancel

Card number:

Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

payment

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

Edit payment Custom Field

Card Number

Help for this Page

Custom Field Definition Edit

Change Field Type Save Cancel

Field Information

Field Label Card Number

Field Name Card_Number

Description

Help Text

Data Owner User

Field Usage --None--

Data Sensitivity Level --None--

Compliance Categorization

Available

Chosen

Data Sensitivity Level

Compliance Categorization

General Options

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

Default Value [Show Formula Editor](#)

Text Options

Length 10

Change Field Type Save Cancel

Transaction Id (Auto Number):

Setup

Home

Object Manager

Search Setup

Star

Plus

Refresh

Help

Settings

Notifications

User Avatar

Setup > OBJECT MANAGER

payment

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

Transaction id (Auto number)

Custom Field Definition Edit

Change Field Type Save Cancel

Field Information

Field LabelTransaction id (Auto number)Data TypeNumber

Field NameTransaction_id_Auto_numbe

Description

Help Text

Data OwnerUser

Field Usage--None--

Data Sensitivity Level--None--

Compliance Categorization

AvailableChosen

AvailableChosen

General Options

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

Unique☐ Do not allow duplicate values

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

AI Prediction☐ Use this field to store AI prediction scores

Default ValueShow Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes ("this_text"). Include numbers without quotes (25). Show percentages as decimals (0.10), and express date calculations in the standard format: {Today() + 7}. To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mdt.RecordAPINameField__c

Number Options

Length18

Decimal Places0

Change Field Type Save Cancel

Cancel Transaction:

Setup

Home

Object Manager

Search Setup

Setup > OBJECT MANAGER

payment

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

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

Link View Button Layout

Cancel Transaction

Custom Field Definition Edit

Field Information

Field Label

Cancel Transaction

Field Name

Cancel_Transaction

Description

Help Text

Data Owner

User

Field Usage

--None--

Data Sensitivity Level

--None--

Compliance Categorization

Available

PII

HIPAA

GDPR

PCI

Chosen

General Options

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

Default Value

Show Formula Editor

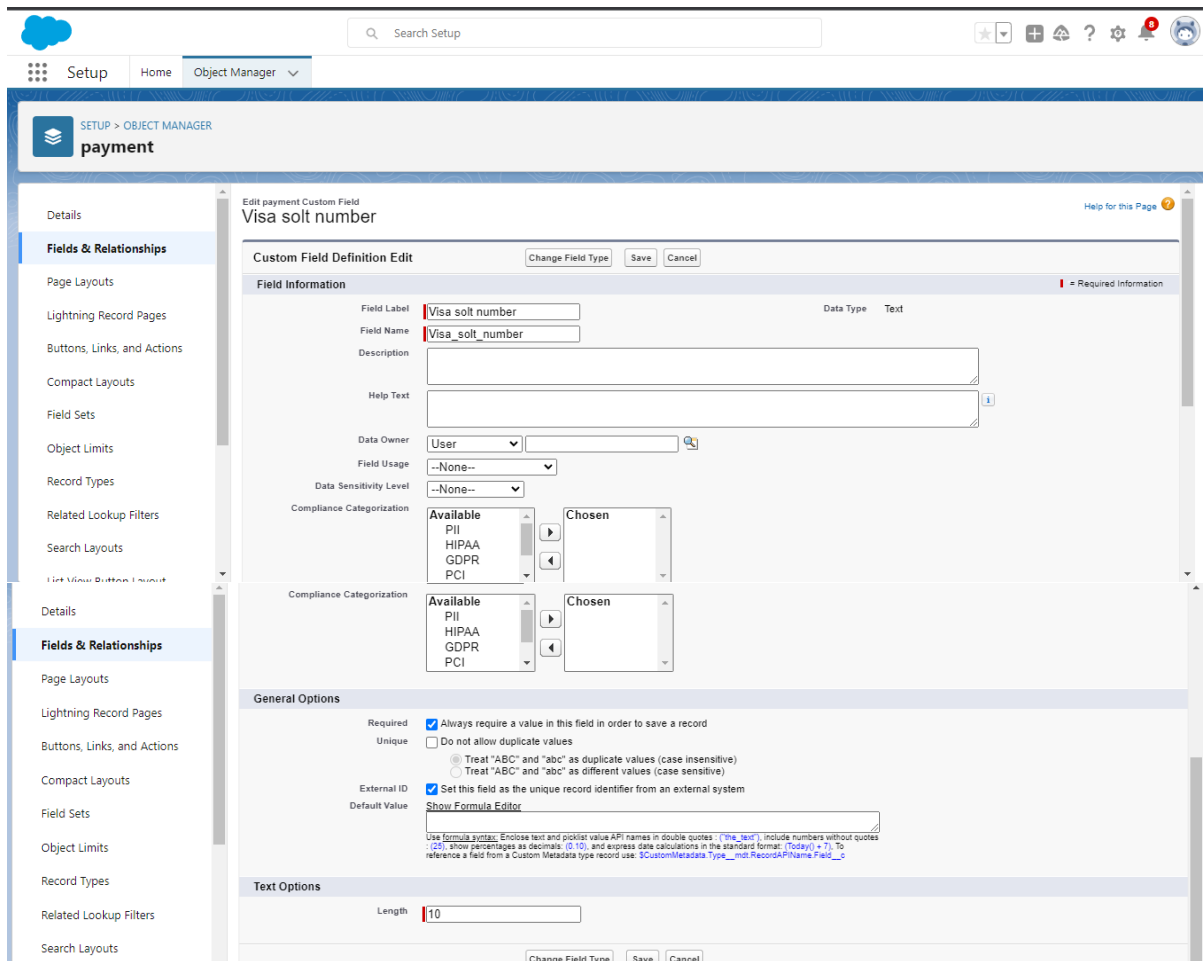
Use formula syntax: Enclose text and picklist value API names in double quotes : 'the_text'. Include numbers without quotes : 25. Show percentages as decimals : 0.10, and express date calculations in the standard format : {Today} + 7). To reference a field from a Custom Metadata type record use : \$CustomMetadata.Type__mdt.RecordAPIName.Field__c

Text Options

Length

10

Visa Slot Number (Master):



The screenshot shows the Salesforce Setup interface, specifically the 'Object Manager' section for the 'payment' object. The 'Edit payment Custom Field' page is open for a field named 'Visa solt number'. The field is currently defined as a 'Text' type. The 'Field Information' section includes fields for 'Field Label' (Visa solt number), 'Field Name' (Visa_solt_number), 'Description', 'Help Text', 'Data Owner' (User), 'Field Usage' (--None--), 'Data Sensitivity Level' (--None--), and 'Compliance Categorization' (Available: PII, HIPAA, GDPR, PCI; Chosen:). The 'General Options' section includes 'Required' (checked), 'Unique' (unchecked), 'External ID' (checked), and 'Default Value' (Show Formula Editor). The 'Text Options' section includes 'Length' (10). The 'Save' button is visible at the bottom right.

creation of field on custom object: **Reschedule/Cancel**

Passport Number (Master):

Select our Object from the selection has Reschedule/cancel and select option 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 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 Reschedule/cancel Field are create like this type.

Setup

Home

Object Manager

Search Setup

Star

Plus

Home

Help

Settings

Notifications

Avatar

Setup > OBJECT MANAGER

Reschedule

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

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

Edit Reschedule Custom Field

Passport Number (Master)

Help for this Page

Custom Field Definition Edit

Change Field Type

Save

Cancel

Field Information

Field Label

Passport Number (Master)

Data Type

Text

Field Name

Passport_Number_Master

Description

Help Text

Data Owner

User

Field Usage

--None--

Data Sensitivity Level

--None--

Compliance Categorization

Available

PII

HIPAA

GDPR

PCI

Chosen

Compliance Categorization

Available

PII

HIPAA

GDPR

PCI

Chosen

General Options

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

Default Value

Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes. {The text}, include numbers without quotes. {24}, show percentages as decimals (0.10), and express date calculations in the standard format. {Today() + 7}. To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mdt.RecordAPIName.Field__c

Text Options

Length

10

Change Field Type

Save

Cancel

Location:

**Time:**

[Setup](#)
[Home](#)
[Object Manager](#)

Reschedule

[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](#)

Edit Reschedule Custom Field
Cancle
Help for this Page

Change Field Type Save Cancel

Field Information

Field Label

Cancle

Data Type

Text

Field Name

Cancle

Description

Help Text

Data Owner

User

Field Usage

--None--

Data Sensitivity Level

--None--

Compliance Categorization

Available

PII

HIPAA

GDPR

PCI

Chosen

Compliance Categorization

Available

PII

HIPAA

GDPR

PCI

Chosen

General Options

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

Default Value

Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes. "the_text". Include numbers without quotes (24). Show percentages as decimals (0.10), and express date calculations in the standard format: (Today) + 7. To reference a field from a Custom Metadata type record use: \$CustomMetadataType__mdt.RecordAPIName.Field__c

Text Options

Length

10

Change Field Type Save Cancel

Reschedule Name:

[Setup](#)
[Home](#)
[Object Manager](#)

Reschedule

[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
Reschedule Name
Help for this Page

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name

Reschedule Name

Example: Account Name

Data Type

Text

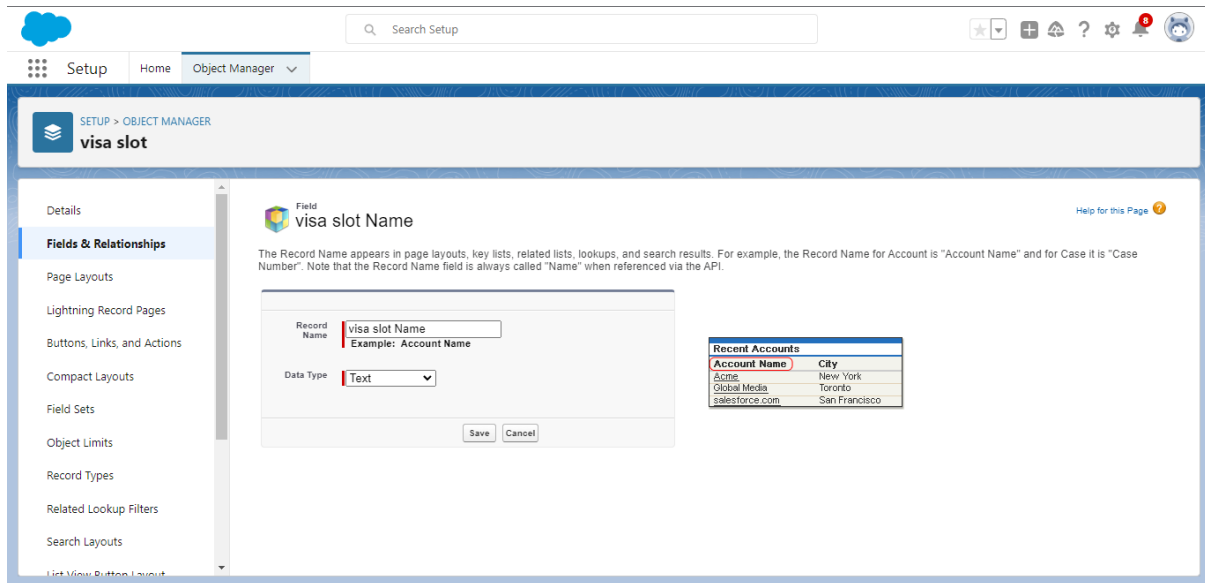
Save Cancel

Recent Accounts

Account Name	City
Acme	New York
Global Media	Toronto
Salesforce.com	San Francisco

3. Creation of Relationship: Relationship between Objects

To create a Master Detail relationship between Passport and visa Select the object manager Visa Slot object from the list and select the Filed and relationship and click new. The data type has Master detail relationship and goe the next page and save it. To create the relationship between payment and slot in this type.

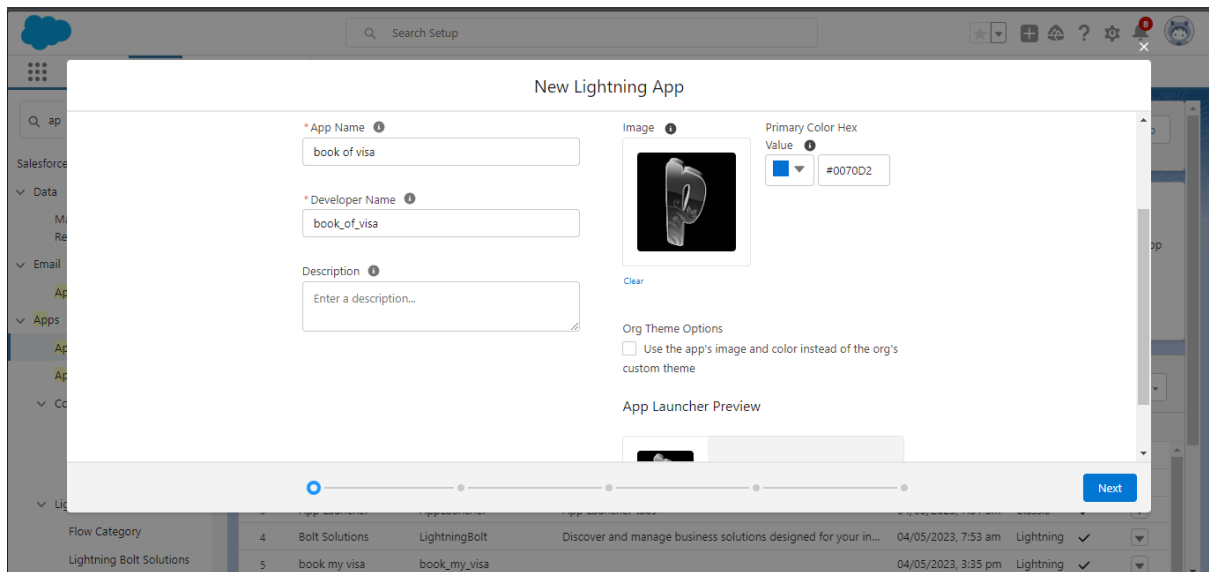


The screenshot shows the Salesforce Setup interface for the 'visa slot' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Field visa slot Name' and includes a description: 'The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.' Below this, there is a form to configure the Record Name field. The 'Record Name' field is set to 'visa slot Name' and the 'Data Type' is set to 'Text'. There are 'Save' and 'Cancel' buttons at the bottom of the form. To the right of the form, there is a table titled 'Recent Accounts' with columns 'Account Name' and 'City'. The table contains three rows of data: 'Acme' (New York), 'Global Media' (Toronto), and 'salesforce.com' (San Francisco).

Account Name	City
Acme	New York
Global Media	Toronto
salesforce.com	San Francisco

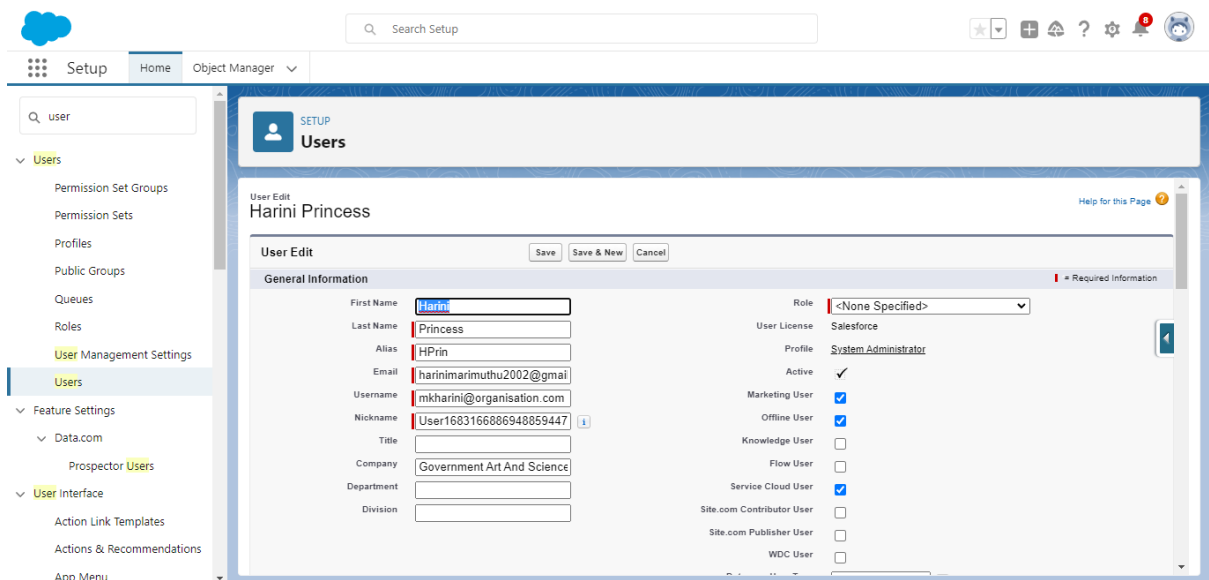
4. Creation of app:

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 user:

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 your 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.



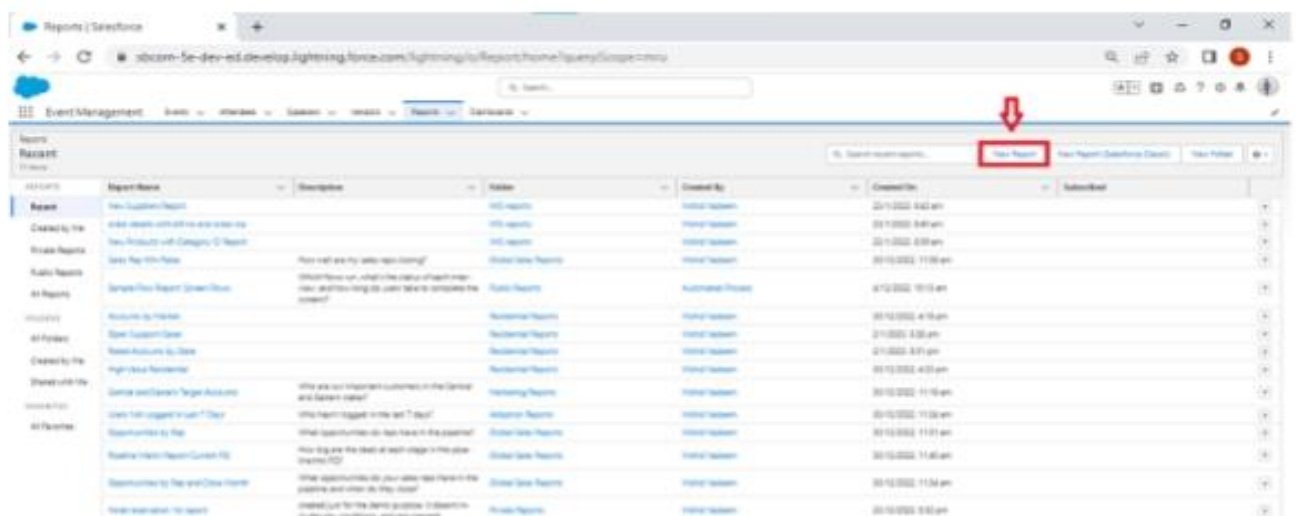
OWD: Organization wide default settings

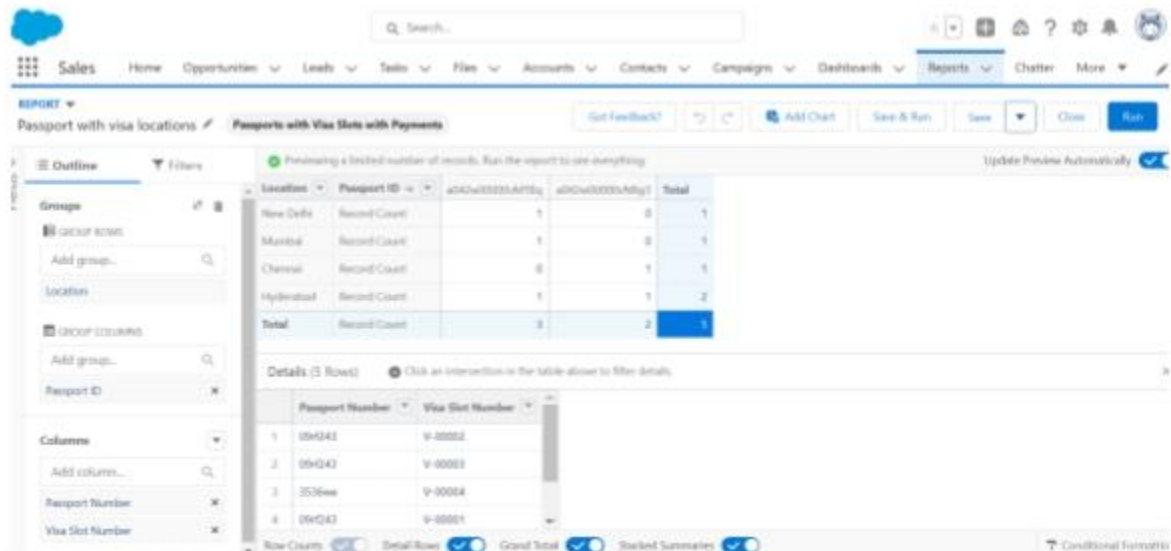
This can be used to give permissions to the organization wide and it can be used to restrict the access, we can control the record level access.

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 reportar Alis new report select the report type as passport with visa sint with payment 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 nasspermato display and add the column select has visa slot number

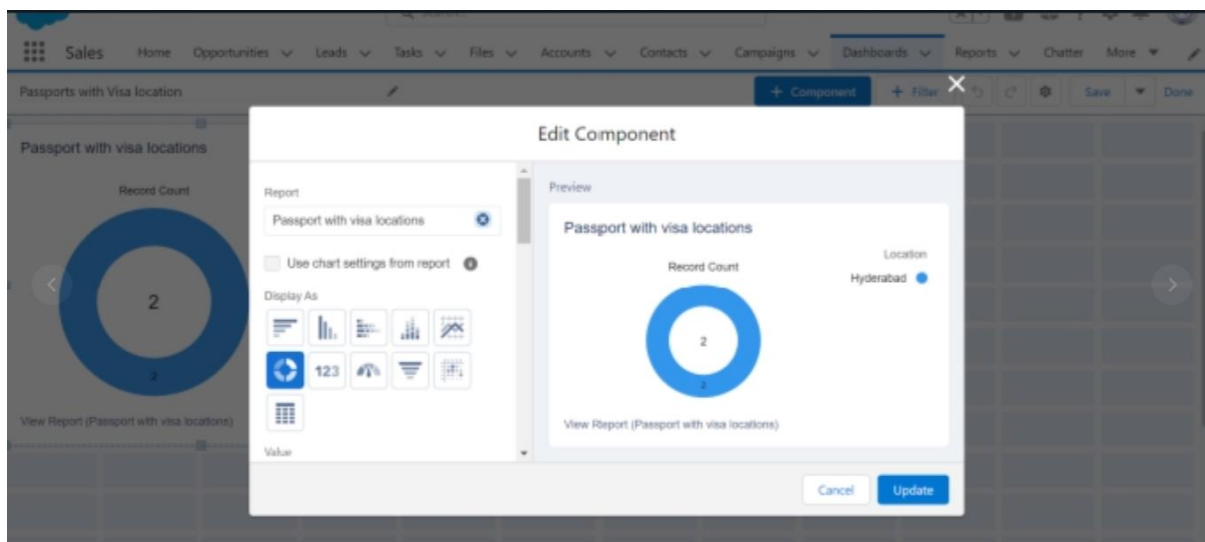




Edit the filters as show me select all passport and passport created date select all time finally save and run it. Go to the edit option and click export select excel sheet format and click export. We can see the detail in the excel sheet as shown.

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 locations.



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

Click add and save the dashboard.

Edit Component

Max Values Displayed

Title

Subtitle

Footer

Legend Position


Preview

Passport with visa locations

Record Count

Location

Hyderabad ●



View Report (Passport with visa locations)

CancelUpdate

Edit Component

Value

Sliced By

Display Units

☒ Show Values

☐ Show Percentages

☒ Combine Small Groups into "Others"

☒ Show Total


Preview

Passport with visa locations

Record Count

Location

Hyderabad ●



View Report (Passport with visa locations)

CancelUpdate

TRAILHEAD PROFILE PUBLIC URL:

Team leader : HARINI M : <https://trailblazer.me/id/princessharini>

Team member : ARTHI K : <https://trailblazer.me/id/akannan59>

Team member : GOWSIKA M : <https://trailblazer.me/id/gowsm6>

Team member : DEEPIKA M : <https://trailblazer.me/id/aamma23>

Advantages:

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

Disadvantages:

- Internet connection problem is there.
- Poor connection leade to trouble and anxiety.
- Lack of leadership.
- Burdensome data entry.

Applications:

With its user-friendly interface and simple setup, Keap is an appealing tool for businesses engaging with CRM software for the first time. Keap is designed to help its users learn quickly without assuming its customers are CRM experts. The all-in-one CRM platform stores all customer activity in a centralized space and automatically adds all customer interactions to grow your team's ability to sell and offer support efficiently. Right from the dashboard, your team can text, email, book appointments, process purchases and add invoices with just one click. To make building your business easier, Keap intuitively automates contact management from activities across multiple platforms.

Keap can be set up in just 20 minutes in small business scenarios, and all customers are provided with a dedicated support manager to ensure successful use of the software. Truly designed to grow your business, Keap provides premade and customizable templates for new pipelines and helpful video guides explaining the software's capabilities. Without any coding experience, you can trigger automated actions to help turn leads into sales. And for efficient navigation, you can organize information chronologically or through a category view. Keap also offers user-friendly analytics and support for revenue trends, email marketing performance and list growth.

Conclusion:

When it comes to CRM providers, Salesforce is known as an industry leader and offers a popular essentials-level platform that's ideal for small and growing businesses. For those ready to level up and delve more deeply into CRM capabilities, Salesforce offers a vast set of tailor-made solutions for sales, marketing and customer service teams.

Future Scope:

CRM software remains a vital part of the hybrid and remote work setup as businesses reevaluate their work environments in 2023, two years after pandemic-related shutdowns. In the coming years, the CRM industry is poised to see massive growth.

According to Technavio's newest report, the industry will grow at an accelerated rate at a CAGR of 13.43 percent and a 12.6 percent year-over-year growth rate between 2022 and 2027.

Two years ago, the CRM market was valued at \$57.83 billion. For the forecasted period (2022 – 2027), it has a projected growth of \$59.4 billion. Experts believe North America will account for 52 percent of the market's growth.

In 2023, CRMs will become more focused on self-service for customers. Salesforce data showed that nearly 80 percent of service professionals said their customers had increased their use of self-service during the pandemic. Examples of self-service will be seen in FAQ pages, help centers and secured customer profiles, where returns can be processed, or ord...

*****Thank You*****