CRM APPLICATION TO HELP FOR BOOKING VISA SLOT

1. INTRODUCTION

1.1 Overview

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.
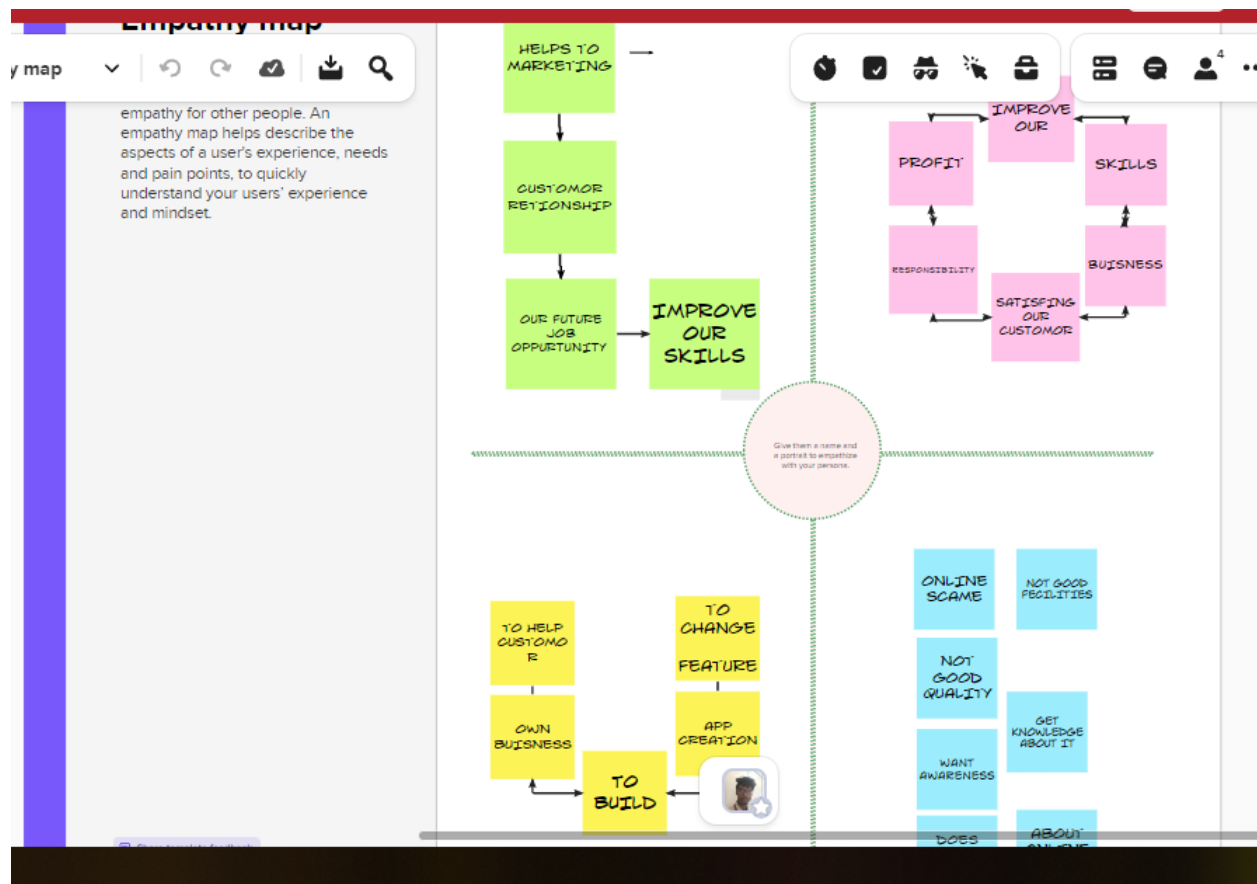
1.2 Purpose

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.
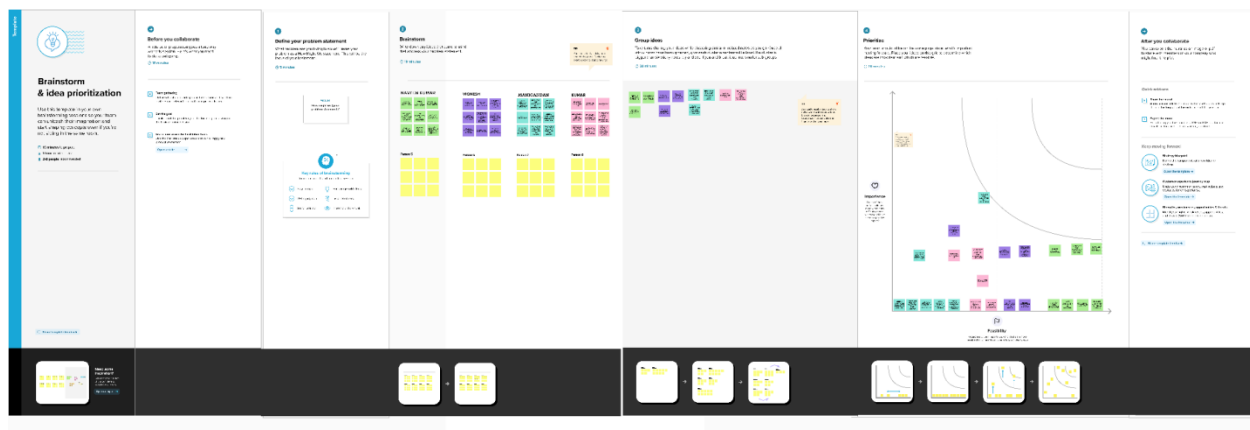
It might be used by a government agency or a visa processing center to schedule and manage appointments with applicants.

2. Problem Solution & Design Thinking

2.1 Empathy Map

2.2 Ideation & Brainstorming Map

Brainstorming is a group creativity technique by which efforts are made to find a conclusion for a specific problem by gathering a list of ideas spontaneously contributed by its members

3. RESULT

3.1 Data Model

Object name:	Field in the Object:	
	Field Name	Data Type
Passport	Passport Number	Text
	Contact Number	Number
	Full Name	Text
	Permenant Address	Text
VISA	Visa	Text
Payment	Payment	Text
Reschedule/Cancel	Reshedule/ Cancel	Text

## 3.2 Activity & Screenshot

Activity 1:

Creation of custom object: Passport

1) Navigate to setup and select object manager.

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

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

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

5) In enter record name label and format enter name record name has passport number
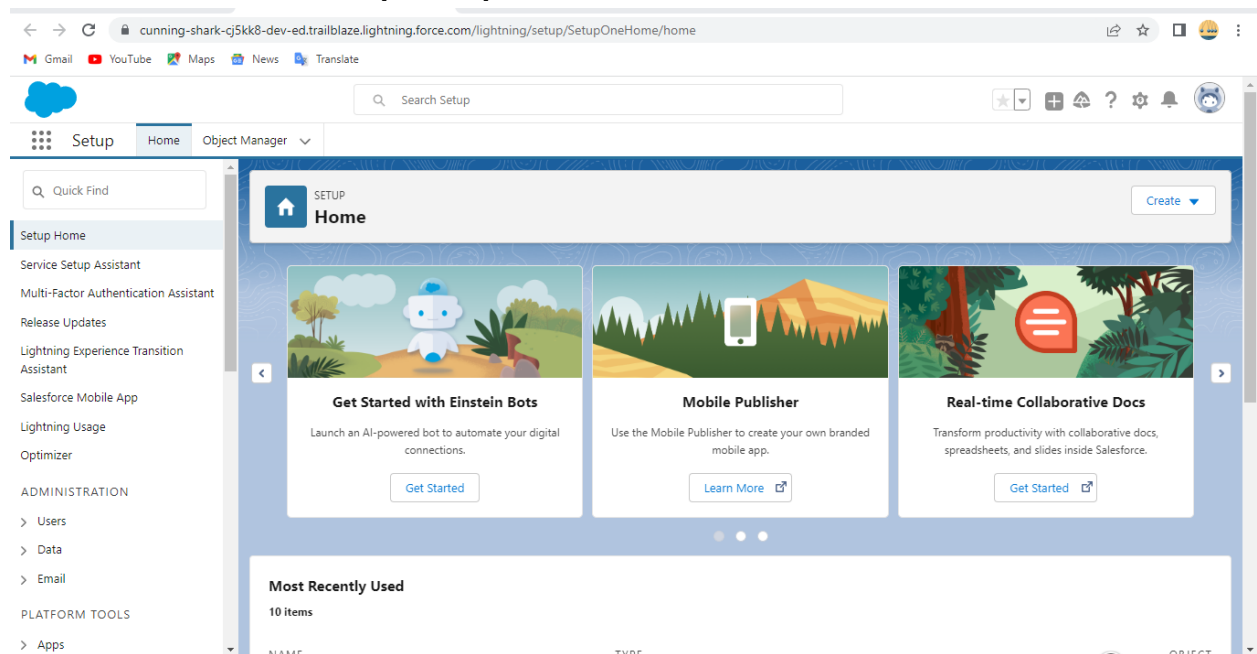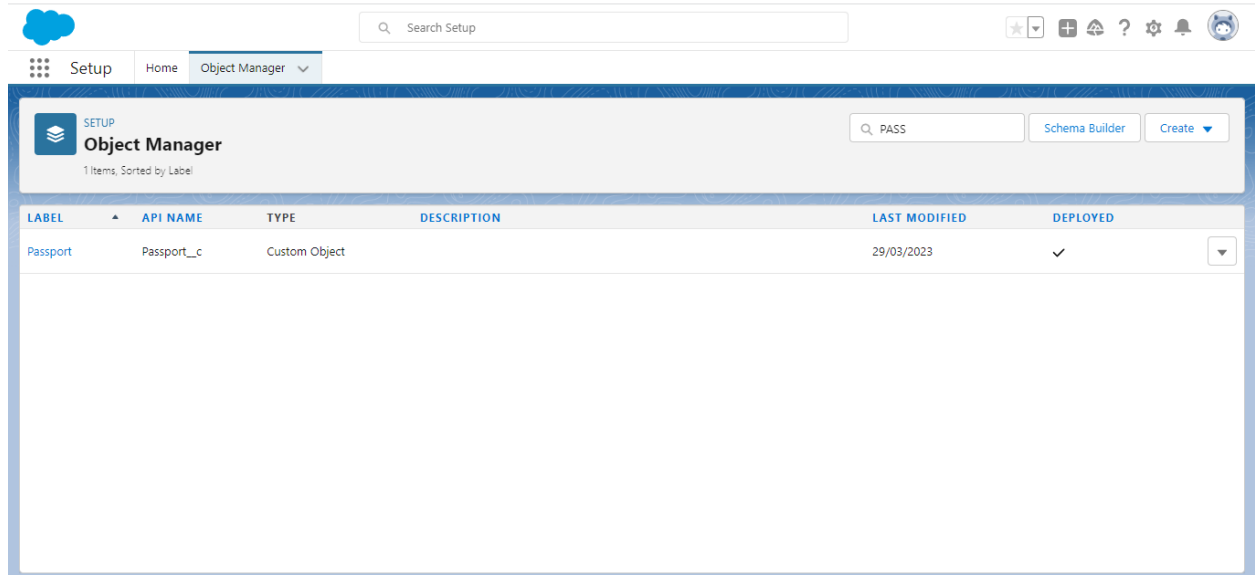
6) And the data type has text.

7) In deployment status select deployed option.

8) Ensure that you have to select at least one option in the object creation option; it is available only once when a custom object is created.

9) Then click on next you will navigate to the new custom object tab where you have to select tab style and click on next.

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

11) Thereafter you have to select a custom app select include tab so that object will be available in all objects and select save option.

Activity-2:
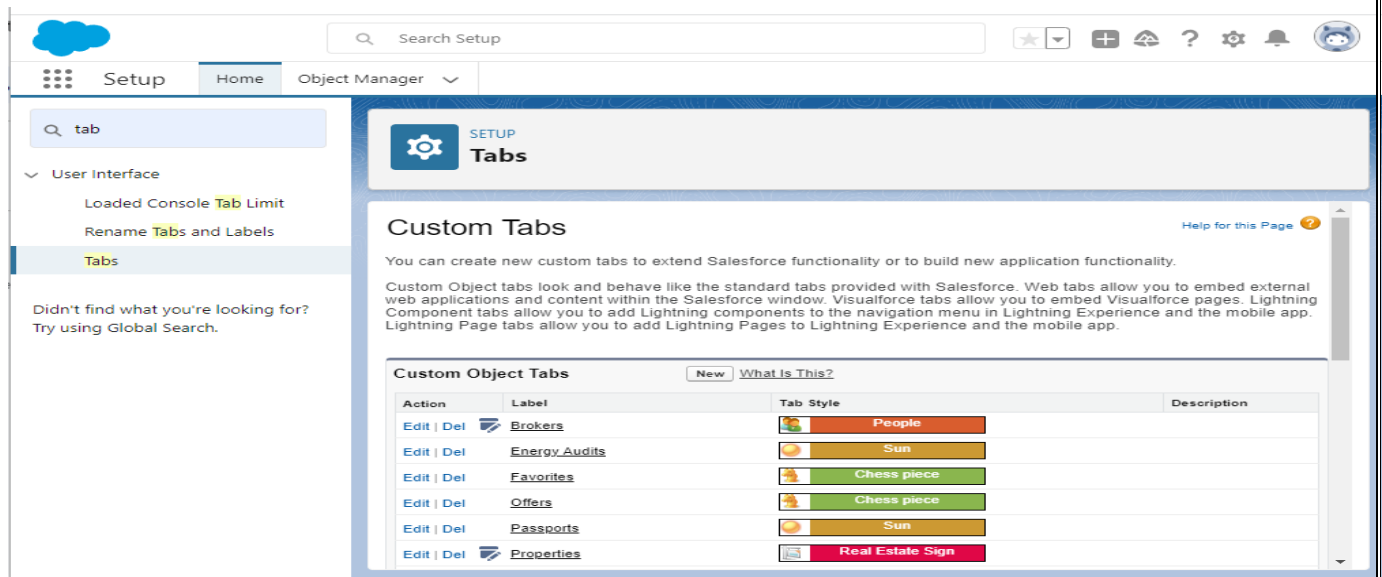
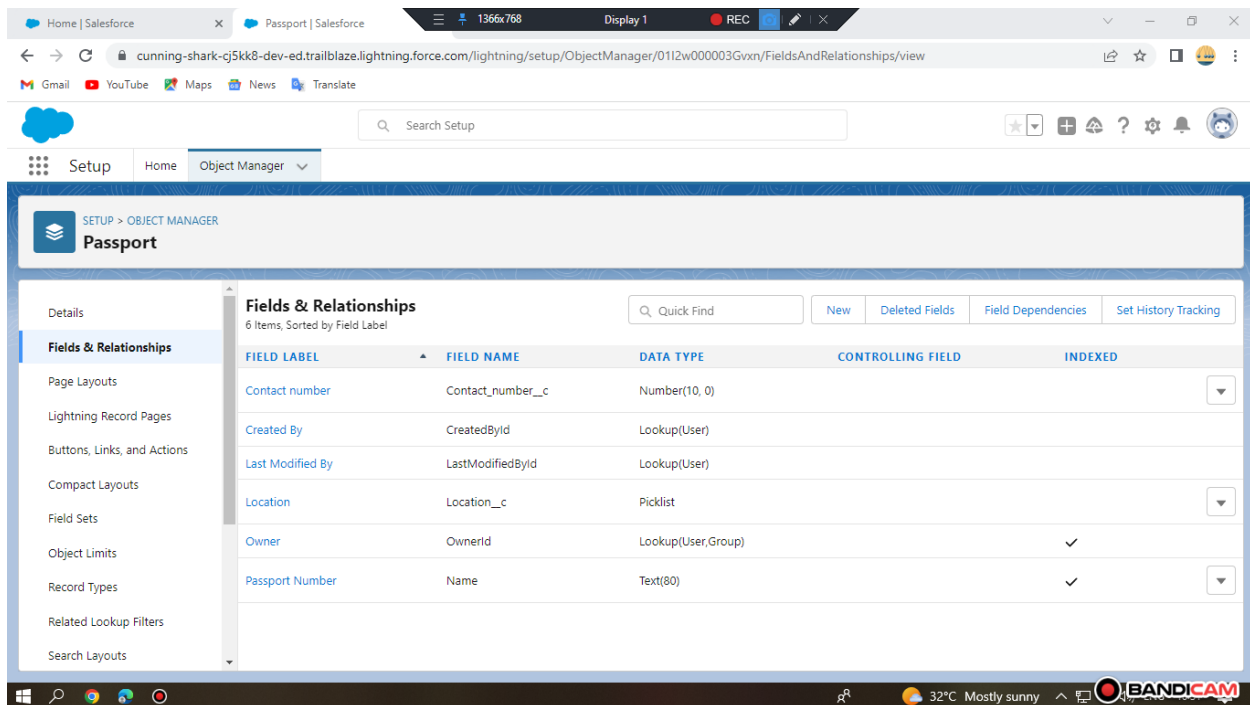Fields available on **custom object: Passport**

Field Name Data Type

1) Contact Number Number

2) Full Name Text

3) Passport Number Text

4) Permanent Address Text

Creation of fields on custom Object: Passport

1) Select your object from object selection has passport.

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

Activity-3:

Creation of Relationship:

To create a Master Detail relationship between Passport and Visa.

1) Go to the Set Up option from the Home Page and click on it.

2) Go to the object manager and select 'visa' object from the list

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

4) Select the data type has Master detail relationship

5) And select related to the object has passport, and click on next

6) You will navigate to the label name page where you give the label name for the field, give it has passport number and click next.

7) Select visible for all profiles in field level security and select page layout in next page and save it.

Activity-4:
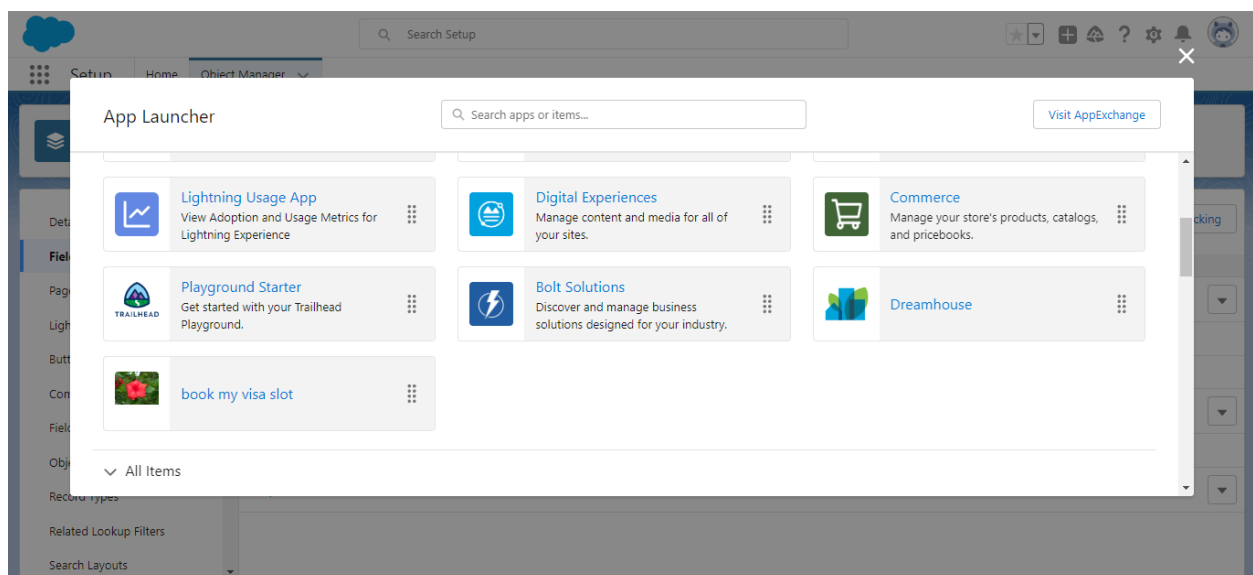
Creation of App An app

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.
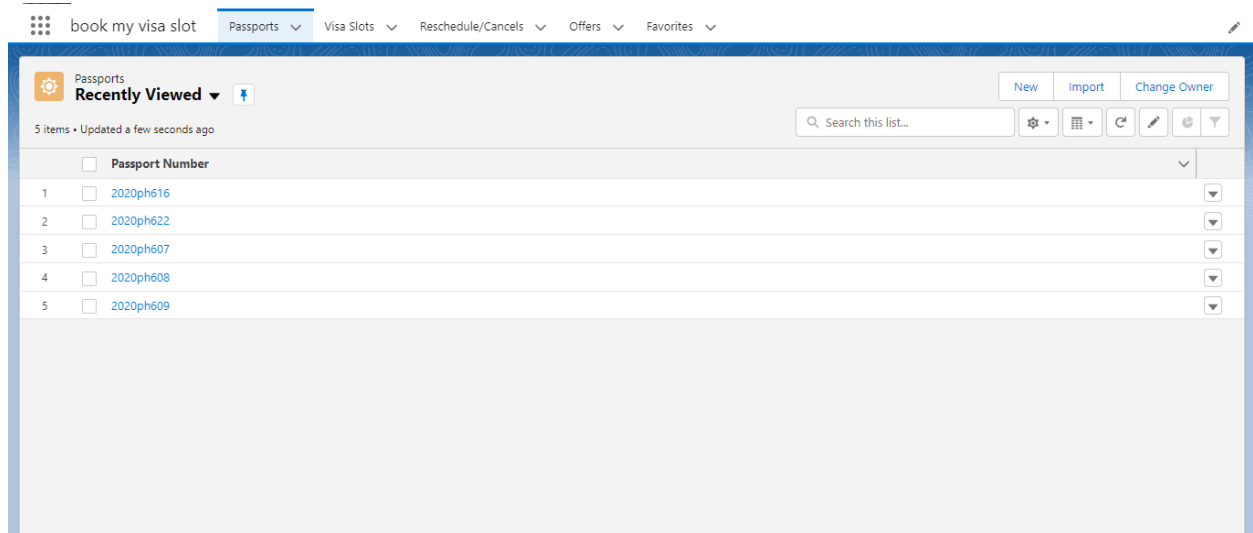
7) Passport, visa slots, payments,reschedule/cancel to selected items.

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

Activity-5:

Creation of User

1) Navigate to setup in quick find search bar
2) Type user in and select it and click on new user.
3) Give the first name and last name.

4) Enter your email in the email field.
5) Enter username; it must be unique.
6) Select the user license of salesforce.
7) In the profile field select standard user.
8) At the bottom of the page check the box to generate a new password and notify the user immediately.

Activity-6:

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 .
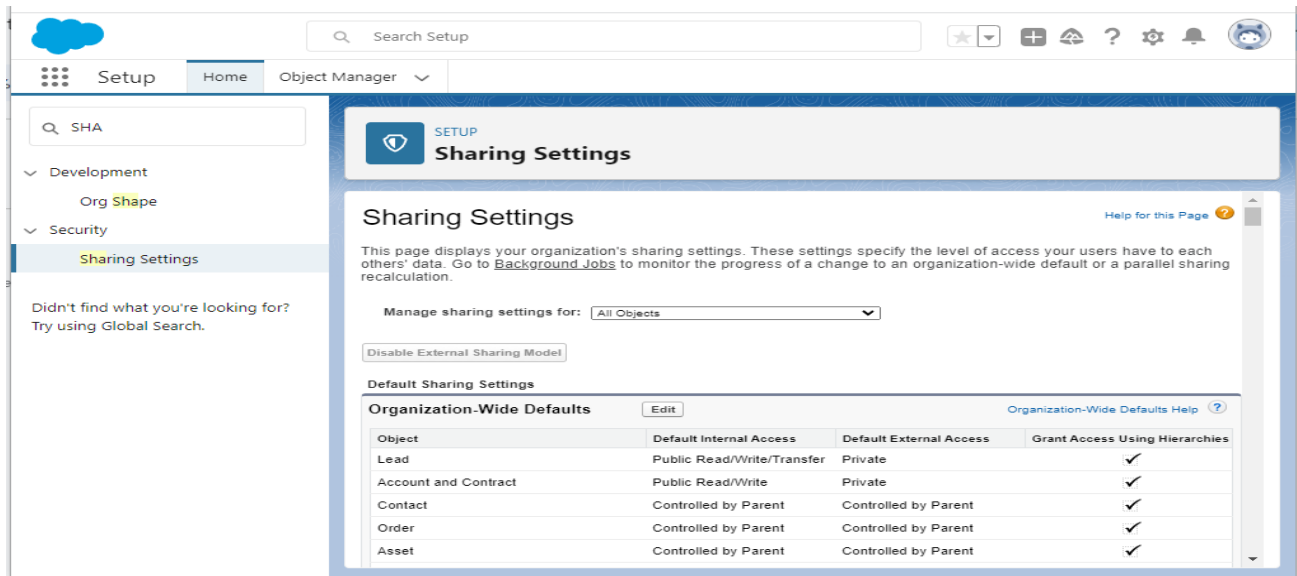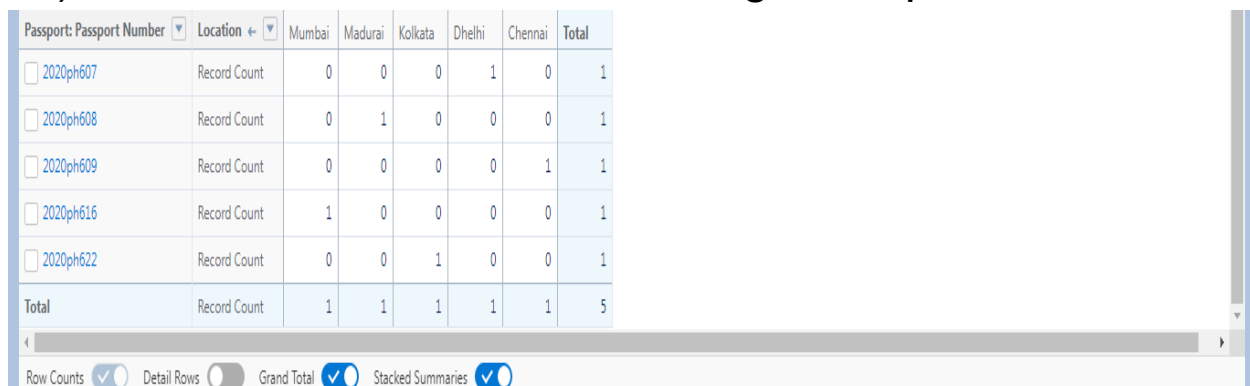

1) Navigate to setup in quick find search bar
2) Type sharing settings and you will navigate to the sharing settings page.
3) Go down to the page and select owd.
4) And click edit on the owd.
5) Navigate to the bottom of the page and select the passport object.
6) And change the default external access to public/Read/write.

Activity-7:

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.

Passport: Passport Number ▼	Location ← ▼	Mumbai	Madurai	Kolkata	Dhelhi	Chennai	Total
☐ 2020ph607	Record Count	0	0	0	1	0	1
☐ 2020ph608	Record Count	0	1	0	0	0	1
☐ 2020ph609	Record Count	0	0	0	0	1	1
☐ 2020ph616	Record Count	1	0	0	0	0	1
☐ 2020ph622	Record Count	0	0	1	0	0	1
Total	Record Count	1	1	1	1	1	5

Row Counts ✓○ Detail Rows ○ Grand Total ✓○ Stacked Summaries ✓○

Activity-8;

Creation of Dashboard

1) Click on the app launcher and search for dashboards.

2) 3) Select the new dashboard option.

4) Name the dashboard has a Passport with visa locations.

5) And select create option.

6) Now click on Add component and for report select passport with locations.

7) Select the donut chart in display as section.

8) Ensure that value is record count and sliced by locations.

9) Leave the default values.

10) Click on add.

11) And save the dashboard.
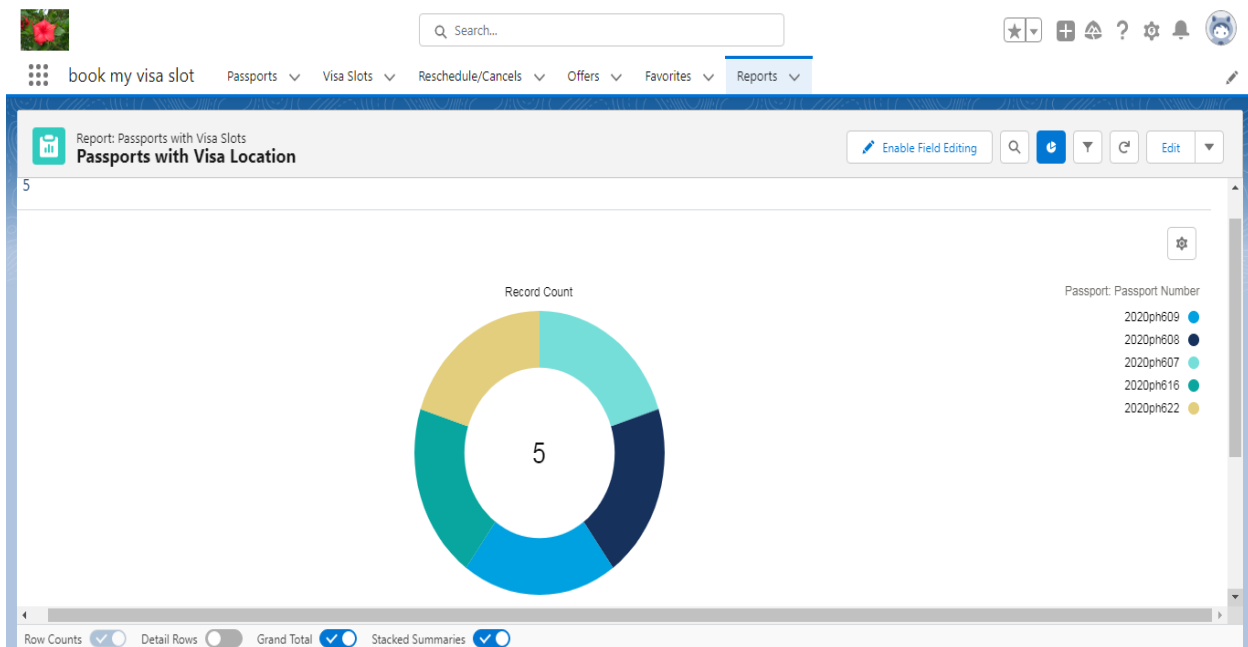
4.**Trailhead Profile public URL:**

Team Lead(k.Vignesh) - https://trailblazer.me/id/vvicky90
Team Member1(A.Naveenkumar) - https://trailblazer.me/id/nkumar1431
Team Member 2(G. Manigandan) -https://trailblazer.me/id/mmanigandan
Team Member 3(S.Kumar) - https://trailblazer.me/id/ksubash6

5.ADVANTAGE & DISADVANTAGE

5.1 Advantage

- ➤ Easy to migrate to another country.
- ➤ People stay long time.

5.2 Disadvantage;

- ➤ people donot have awareness about this system.
- ➤ some broker misused this system.

6.APPLICATION;

- ❖ It helps to people to book it.
- ❖ It used to travel other countries.
- ❖ It is used to stay long time.

7.CONCLUSION

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.

8.FUTURE SCOPES

[The future of CRM] is about which **companies will be able to pivot to meet the changing needs and trends — driven by customer expectations**. Customers expect organizations to know a lot about them and expect to have conversations.