

# PROJECT REPORT

## CRM APPLICATION THAT HELPS TO BOOK A VISA SLOT

### 1. INTRODUCTION

#### 1.1 Overview

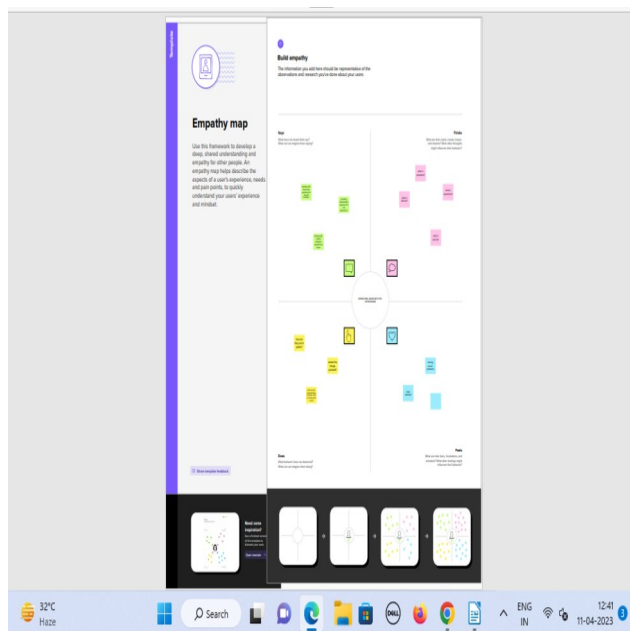
A visa slot management project is a system that is used to track and manage the availability of visa slots, which are appointments that are required for certain visa applications. It might be used by a government agency or a visa processing centre to schedule and manage appointments with applicants.

#### 1.2 Purpose

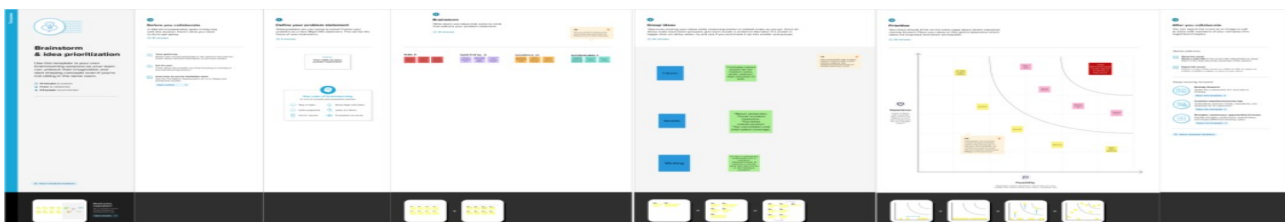
The purpose of the visa interview is to determine whether the applicant should be given a student visa or not. Therefore, it is very crucial for you to cross this stage to make your abroad dreams a reality.

### 2. PROBLEM DEFINITION & DESIGN THINKING

#### 2.1 Empathy Map



#### 2.2 IDEATION & BRAINSTORMING MAP



## RESULT

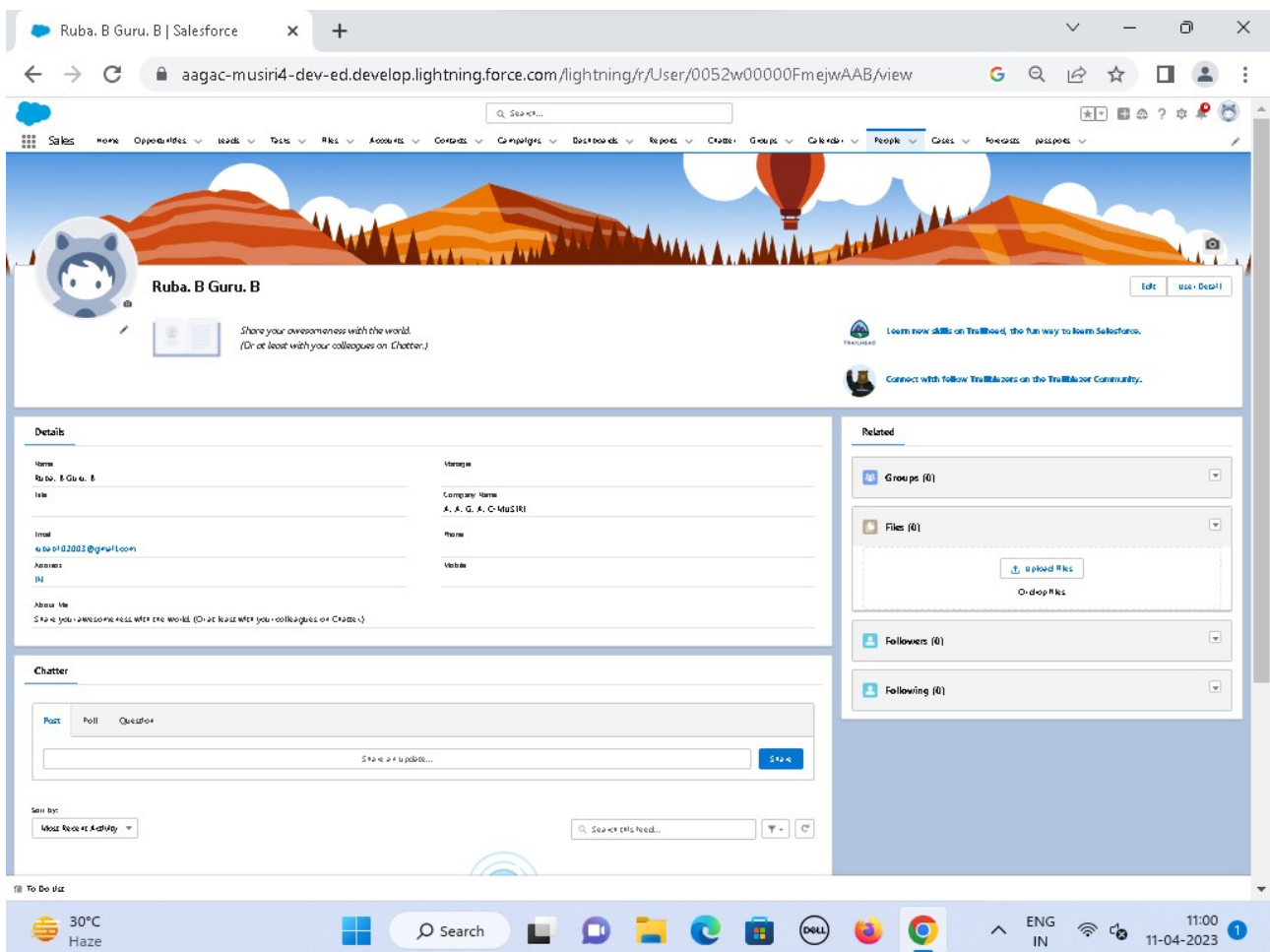
### 3.1 Data Model

Object name	Fields in the Object	
Obj 1	Field label	Data type
	Visa name	text
Obj 2	Field label	Data type
	Passport number	Master detail

### 3.2 ACTIVITY & SCREENSHOT

#### Milestone-1: Salesforce

##### Activity 1:



#### Milestone-2: Objects:

##### Activity-1:

Home | Salesforce

aagac-musiri4-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home

Search Setup

Setup Home

Get Started with Einstein Bots

Mobile Publisher

Real-time Collaborative Docs

Most Recently Used

Name	Type	Object
Radio: B-Globe: B	User	
passport	Custom Record Definition	passport
passport	Custom Object Definition	
visa	Custom Object Definition	
passport renewal	Custom Record Definition	visa
Radio: B-Balloon: A, D	User	
passport layout	Page Layout	passport
passport	Custom Type Definition	passport

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Search

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## Milestone-2: Objects:

### Activity-1

passport | Salesforce

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🔍 Search Setup

⋮ Setup Home Object Manager

🔍 SETUP > OBJECT MANAGER

passport

Details

Related Relationships

Page Layouts

Signing Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Links

Record Types

Related Lookup Fields

Search Layouts

Use View Button Layout

Restriction Rules

Security Rules

Triggers

Flow Triggers

Validation Rules

Details

Custom Object Definition Edit

Save Cancel

Custom Object Information

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

The singular label is used when changing the menu or label as it may result in ambiguous references and merge templates.

Label  Example Account

Plural Label  Example Accounts

Searchable ☐

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

Object Name  Example Account

Encapsulation

Customize with Lightning Web Components ☐

Custom Label

Enter Account Name Label and Format

The Record Name appears in page layouts, key tabs, related lists, buttons, 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

Record Type

Optional Features

☒ Allow Reports

☐ Allow Activities

☐ Track Field History

☐ Allow in Chatter Groups

☐ Enable Locking

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

Search Status

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

☒ Allow Search

Save Cancel

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Tabs | Salesforce

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Search Setup

Setup Home Object Manager

tabs

User Interface

Rename Tabs and Labels

Tab

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

### Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

#### Custom Object Tabs

What's This?

Action	Label	Tab Title	Description
<a href="#">Edit</a>   <a href="#">Del</a>	passport	Factory	

#### Web Tabs

What's This?

No Web Tabs have been defined.

#### Visualforce Tabs

What's This?

No Visualforce Tabs have been defined.

#### Lightning Component Tabs

What's This?

No Lightning component tabs have been defined.

#### Lightning Page Tabs

What's This?

No Lightning Page Tabs have been defined.

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Search

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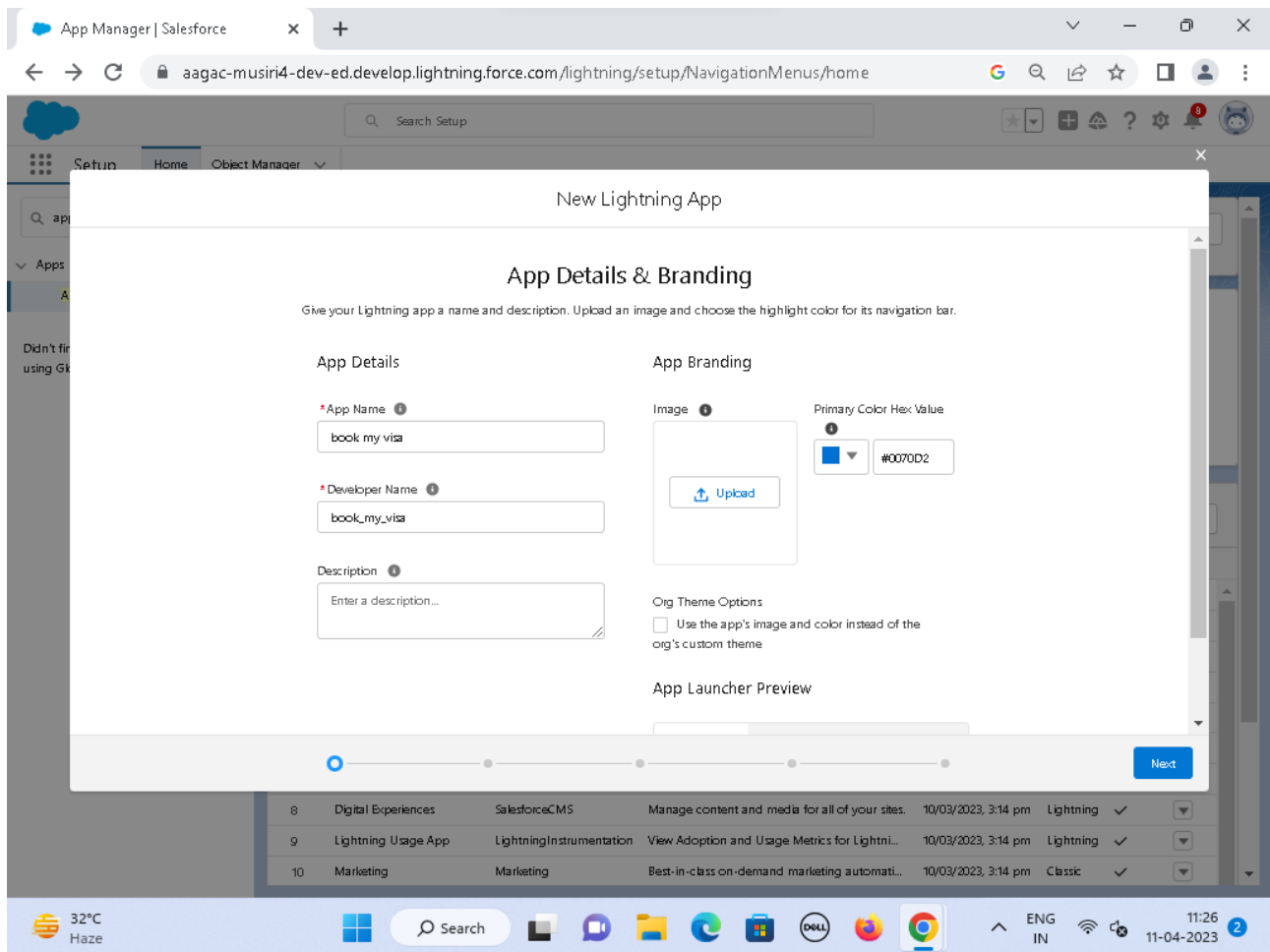
## Activity-2:

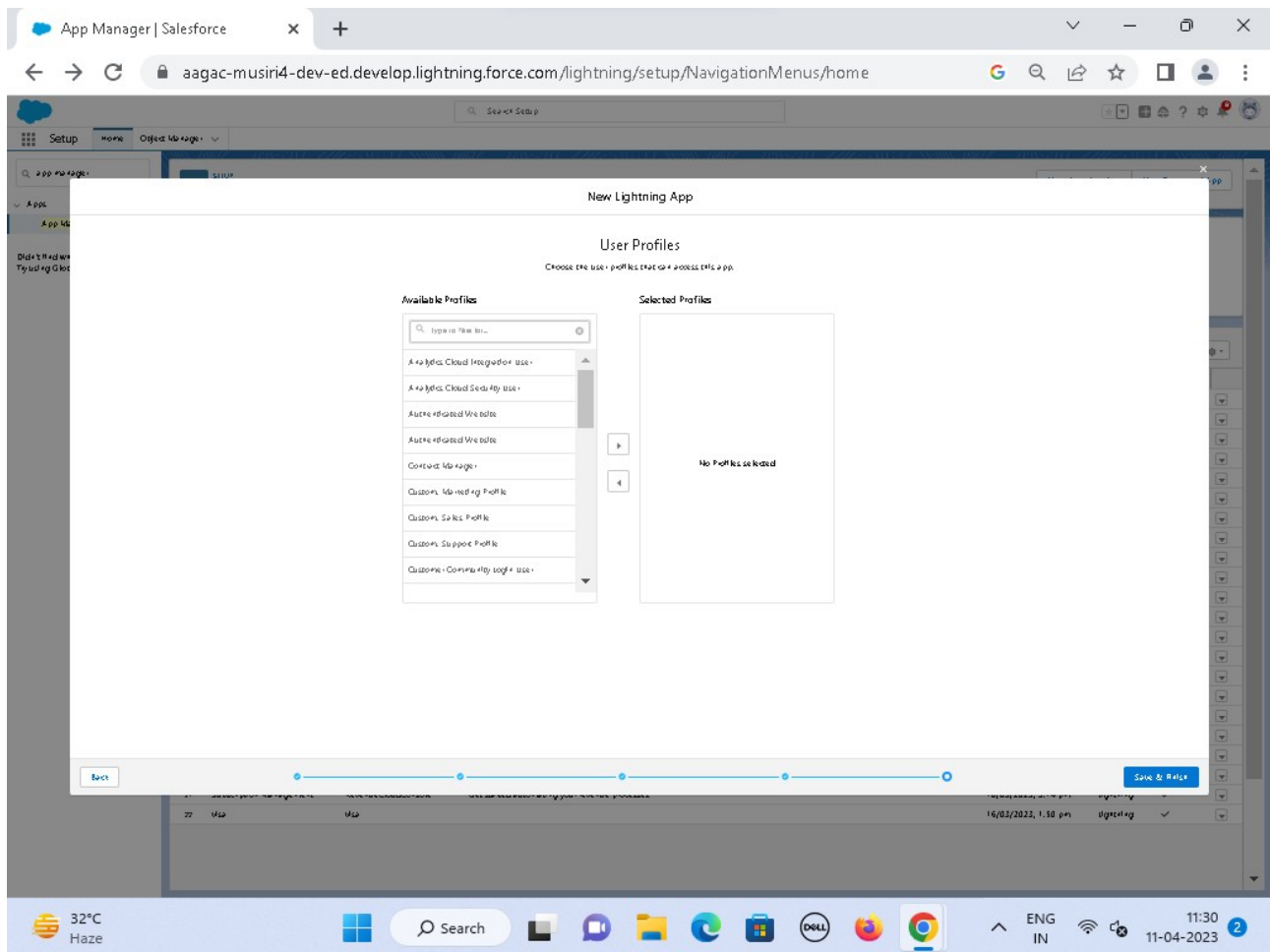
## Activity-1:



### Activity:



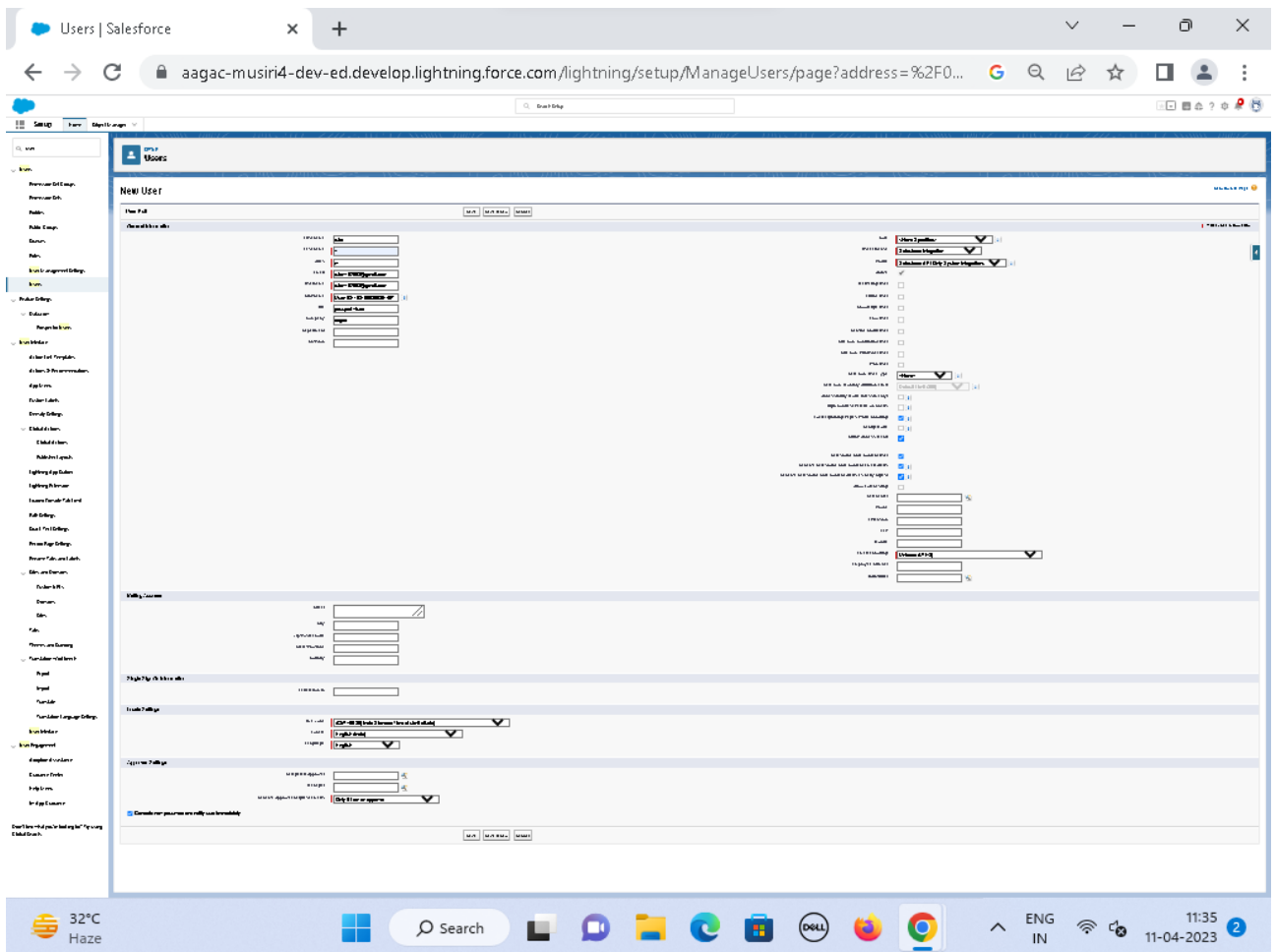




Milestone-5 User:

Activity-1:





## Activity-2:

Sharing Settings | Salesforce

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Setup Home Object Manager

Q sharing

Security

Sharing Settings

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

## Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each other's 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**

☐ Enable External Sharing Model

### Default Sharing Settings

Organization-Wide Defaults  [Organization-Wide Defaults Help](#)

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account/Lead 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	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Product	Public Read/Write	Public Read/Write	✓
Individual	Public Read/Write	Private	✓
Voice Call	Private	Private	✓
Alternative Payment Method	Private	Private	✓
Appointment Invitation	Private	Private	✓
Authorization Form	Private	Private	✓

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Search

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## Milestone-6 Reports:

### Activity-1:

The screenshot displays the Salesforce Reports page. The left sidebar contains navigation links: Reports, Recent (2 items), REPORTS, FOLDERS, and FAVORITES. The main area shows a table of recent reports.

	Report Name	Description	Folder	Created By	Created On	Subscribed
<b>Recent</b>	paasport with visa		Private Reports	Ruba. B Guru. B	17/3/2023, 12:55 pm	[Dropdown]
Created by Me	paasport with visa		Private Reports	Ruba. B Guru. B	17/3/2023, 1:46 pm	[Dropdown]

Below the table, there are sections for FOLDERS (All Folders, Created by Me, Shared with Me) and FAVORITES (All Favorites).

The screenshot shows the Salesforce Dashboards page. The left sidebar contains navigation links: Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards (selected), Reports, Chatter, Groups, and More. The main content area is titled 'Dashboards Recent' and shows a list of 5 items. The table below represents the data shown in the screenshot.

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	passport with visa locations		Private Dashboards	Ruba, B Guru, B	17/3/2023, 1:24 pm	
Created by Me	passport with visa locations	passport apply	Private Dashboards	Ruba, B Guru, B	5/4/2023, 12:35 pm	
Private Dashboards	passport with visa locations	ruha	Private Dashboards	Ruba, B Guru, B	5/4/2023, 12:33 pm	
All Dashboards	passport with visa locations		Private Dashboards	Ruba, B Guru, B	17/3/2023, 1:09 pm	
	passport with visa locations		Private Dashboards	Ruba, B Guru, B	17/3/2023, 1:05 pm	

The bottom of the screenshot shows the Windows taskbar with the date 11-04-2023 and time 11:44.

#### 4. TRAILHEAD PROFILE PUBLIC URL:

Team Lead: 1 <https://trailblazer.me/id/rgurub6>

Team member: 1 <https://trailblazer.me/id/sselvarajd>

Team member: 2 <https://trailblazer.me/id/sasim34>

Team member: 3 <https://trailblazer.me/id/saths55>

#### 5. ADVANTAGES & DISADVANTAGE

- Dashboards that visually showcase data.
- Improved messaging with automation.
- Proactive service.

- Efficiency enhanced by automation.
- Simplified collaboration.

CRM costs. One of the greatest challenges to CRM implementation is cost. ...

- Business culture. A lack of commitment or resistance to cultural change from people within the company can cause major difficulties with CRM implementation. ...
- Poor communication. ...
- Lack of leadership.

## 6. APPLICATIONS:

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.

## 7. CONCLUSION:

CRM in retail allows businesses to make smarter decisions to better serve their customers and maximize profits from repeat purchases. By implementing a CRM into your retail sales process, you can enhance customer relationships by providing personalized service that caters to their individual needs.

## 8. FUTURE SCOPE:

Customers will become a company's best sales reps through superior products and services as well as customer-oriented messaging. The future of CRM is more than just the future of Customer Relationship Management software. It is really the future of business.