

CRM APPLICATION THAT HELPS TO BOOK A VISA SLOT

INTRODUCTION

Overview:

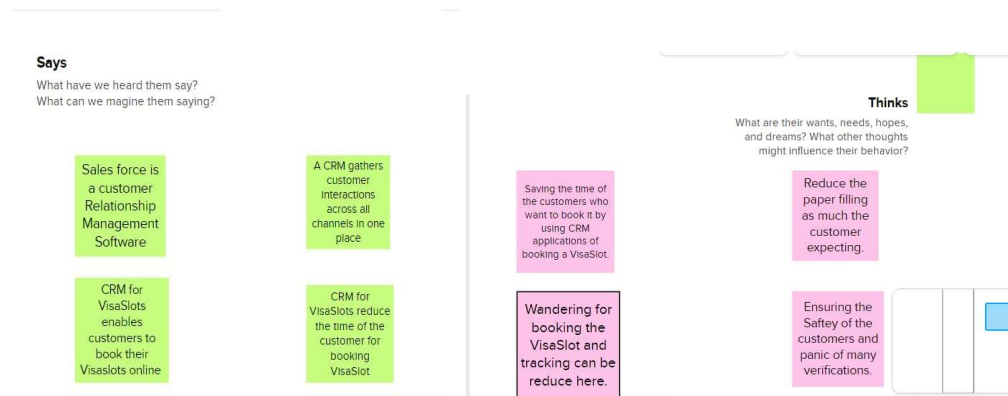
A Visa Slot management project is a system that used to track and manage the availability of visa slot, which are appoints that are required for certain visa applications. It might be used by a government agency or a visa processing centre to schedule and manage appointment with applicants.

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 verification.

Problem definition and design thinking:

Empathy map:



Without being worried they can utilise it.

Booking Visa Slot using CRM application make the customers feel easy.

Many of the customer will choose CRM application for booking Visa Slot.

Making the Customer to trust the CRM.

Does

What behavior have we observed?
What can we imagine them doing?

CRM costs one of the greatest challenges to implement CRM.

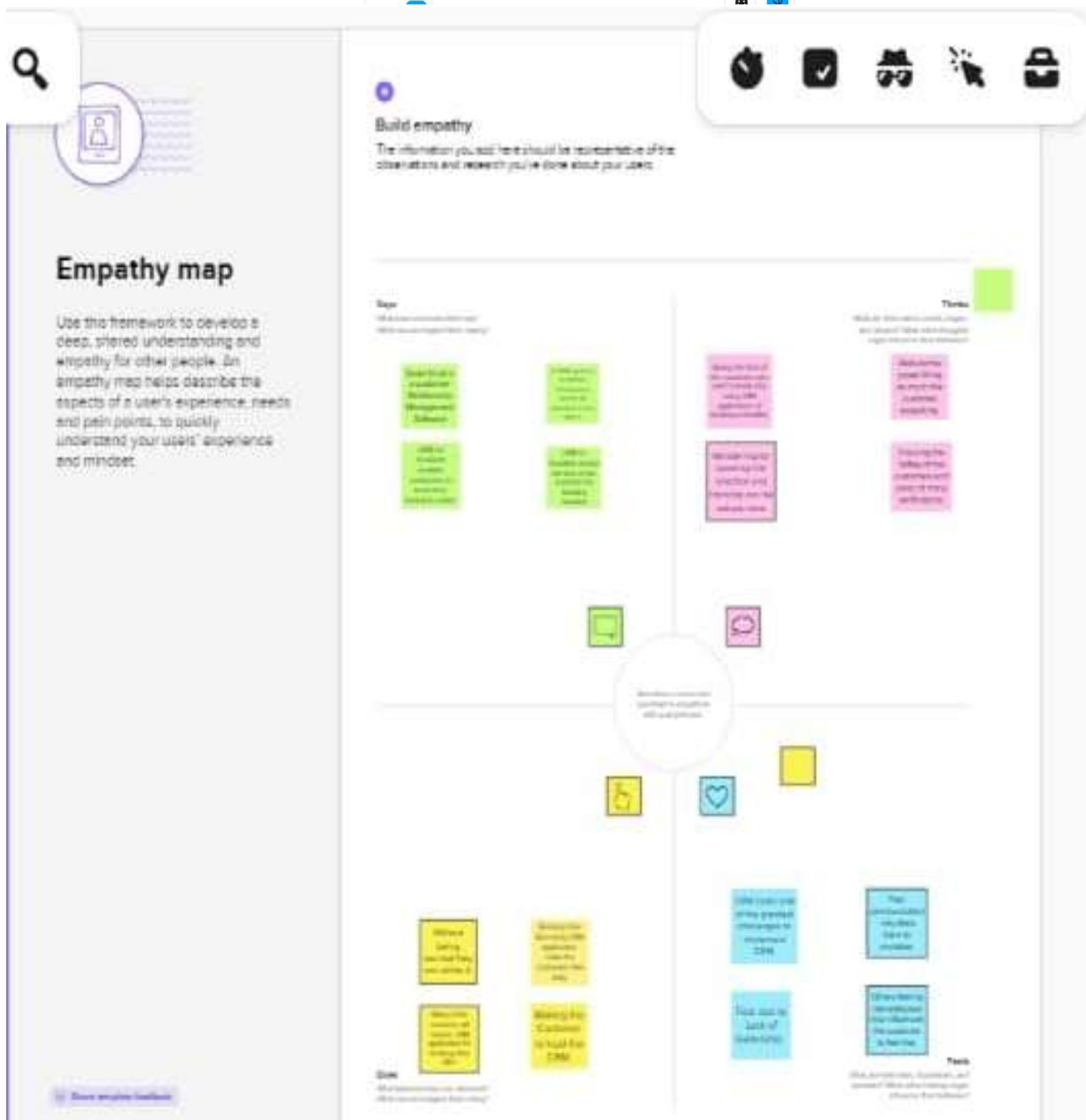
Fear due to Lack of leadership.

Poor communication may feels them to anxieties.

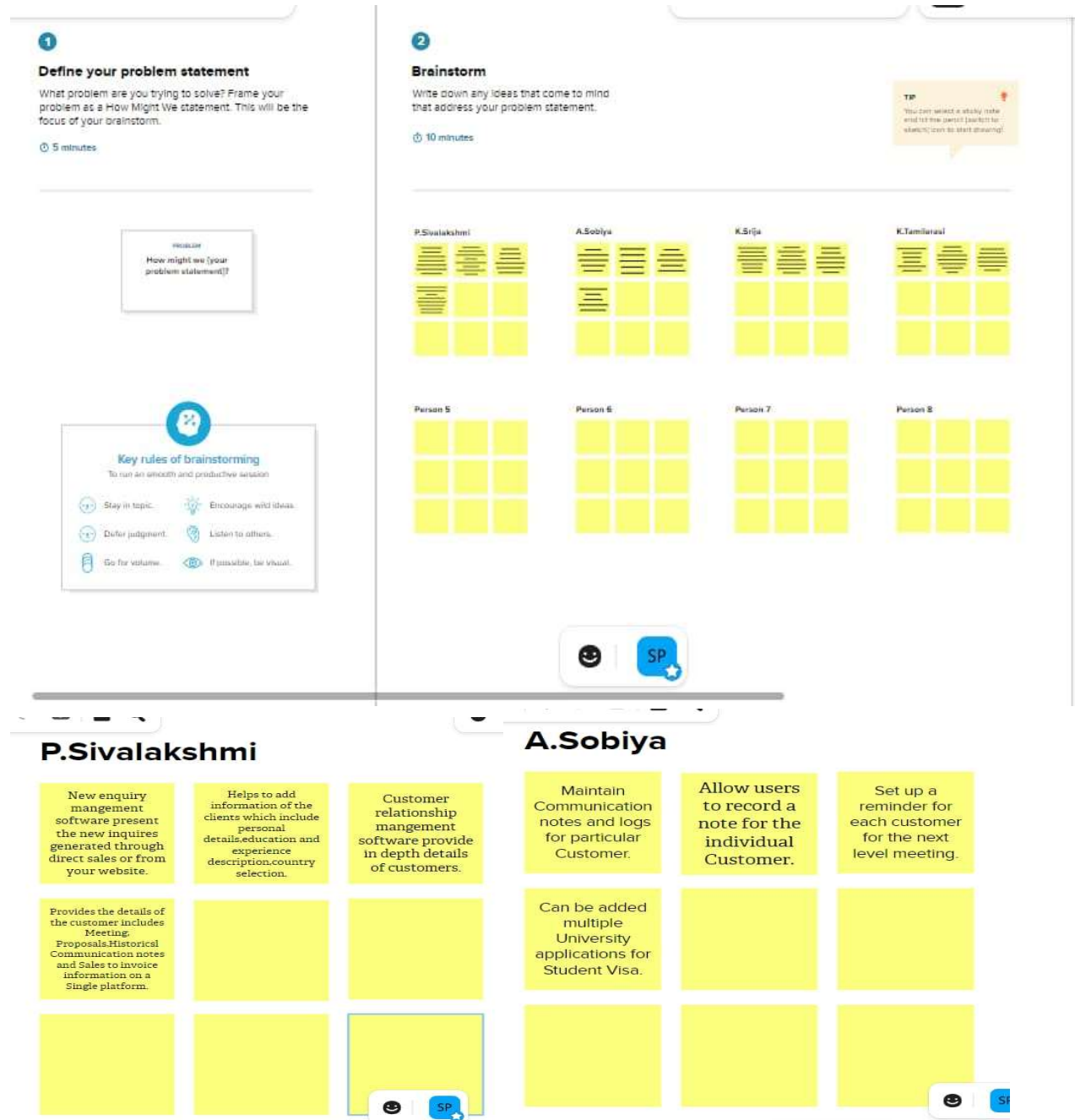
Others feeling like safetyless also influences the customer to feel like.

Feels

What are their fears, frustrations, and anxieties? What other feelings might influence their behavior?



Ideation and Brainstorming map:



K.Srija

Email and Message marketing which helps you to update your customers with new rules and regulations of Immigration.

Easy Email template creation and selection option help you to send a message to different groups of customers.

Promotion Emails and Messages helps you to generate more leads and buisness.

Allow Counsellors to generate Invoice and receipt for Customers online and secure.

Accounting Management enables you to find the invoice with the status of payment that is paid or unpaid.

Through all the facilities they can help the customers to fulfill their needs and taking charge to solve it.



Data Model:

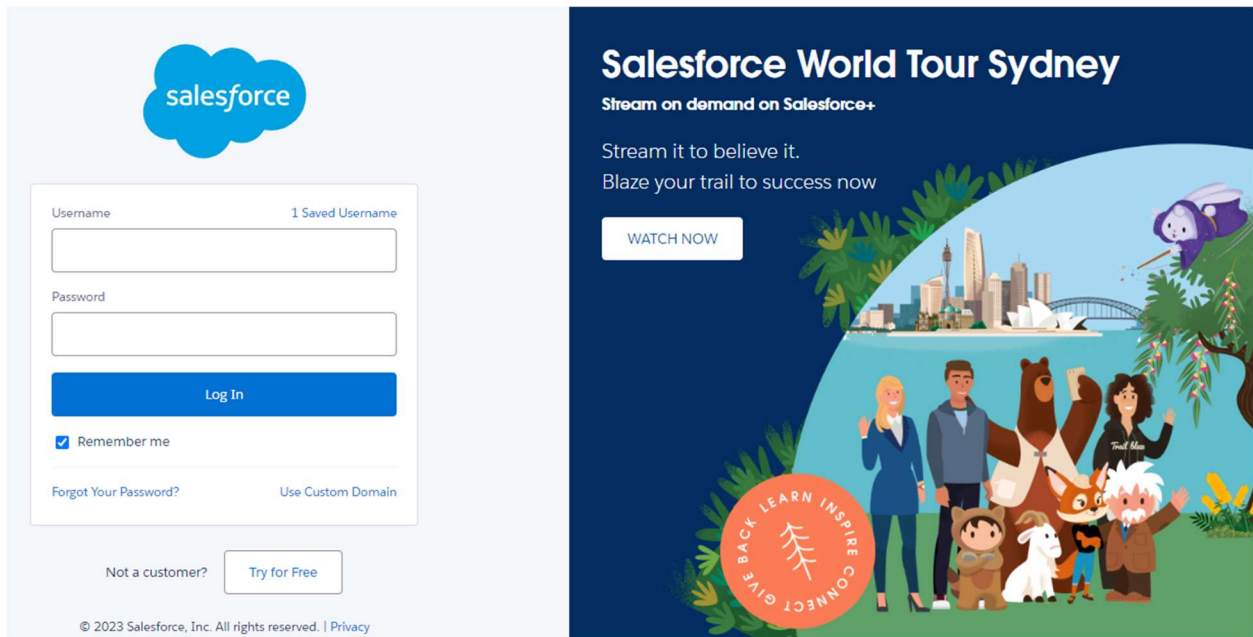
Objects	Passport	Visa Slot	Payment	Reschedule/cancel
Field and Data type	Full Name/Number	Location/ Text	Payment Mode/Text	Passport Number(master)/ Text
Field and Data type	Passport Number/ Number	Time/Number	Card Number/Text	Location/ Text
Field and Data type	Contact Number/Text	Passport Number(Master)/ Text	Transaction id (Auto Number)/ Number	Time/Number
Field and Data type	Permanent address/Text	Visa Slot number/ Number	Cancel Transaction/ Text	Cancel/ Text
Field and Data type	—	—	Visa Slot Number(master)/Text	Status/ Text

ACTIVITY AND SCREENSHOTS

1. Creation of Salesforce platform:

Go to [Developer.salesforce.com](https://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.

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Domain Management

Communication Templates

Translation Workbench

Data Management

Mobile Administration

Desktop Administration

Outlook Integration and Sync

Edit Custom Object

Passport

Help for this Page

Custom Object Definition Edit

Save Save & New Cancel

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

Passport

Example: Account

Plural Label

Passports

Example: Accounts

Starts with vowel sound

☐

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

Object Name

Passport

Example: Account

Description

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

Content Name

--None--

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

Passport Number

Example: Account Name

Objects involved in Book a visa are Visa Slot, Payment, Reschedule/Cancel create in this type.

Visa Slot:

The screenshot shows the Salesforce 'Edit Custom Object' page for the 'Visa Slot' object. The page is titled 'Edit Custom Object Visa Slot' and includes a 'Help for this Page' link. The main section is 'Custom Object Definition Edit', which contains several fields and sections:

- Custom Object Information:** This section includes fields for 'Label' (Visa Slot, Example: Account), 'Plural Label' (Visa Slots, Example: Accounts), and 'Starts with vowel sound' (unchecked). A warning icon indicates required information.
- The Object Name is used when referencing the object via the API:** This section includes the 'Object Name' field (Visa_Slot, Example: Account).
- Description:** A large text area for the object's description.
- Context-Sensitive Help Setting:** Two radio buttons are present: 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page'.
- Content Name:** A dropdown menu currently set to 'None'.
- Enter Record Name Label and Format:** This section includes the 'Record Name' field (Visa Slot Name, Example: Account Name) and the 'Data Type' dropdown (set to Text).

The left sidebar contains navigation links for 'Home', 'Chatter', 'Libraries', 'Content', 'Subscriptions', 'Passports', 'Visa Slots', 'Payments', and 'Reschedules/Cancel'. The top navigation bar includes 'Home', 'Chatter', 'Libraries', 'Content', 'Subscriptions', 'Passports', 'Visa Slots', 'Payments', and 'Reschedules/Cancel'. The top right corner shows the user's name 'Sobiya Arunachalam' and a 'Content' button.

Payment:

The screenshot shows the 'Payment' Custom Object Definition Edit page in Salesforce. The top navigation bar includes links for Home, Chatter, Libraries, Content, Subscriptions, Passports, Visa Slots, Payments, and Reschedules/Cancel. A banner at the top reads 'It's Better in Lightning' with a 'Tell Me More' button. The left sidebar contains a 'Lightning Experience Transition Assistant' and a 'Salesforce Mobile Quick Start' section. The main content area is titled 'Edit Custom Object: Payment' and includes a 'Custom Object Definition Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. Below this is the 'Custom Object Information' section, which includes fields for 'Label' (Payment), 'Plural Label' (Payments), 'Starts with vowel sound' (unchecked), 'Object Name' (Payment), and 'Description'. A 'Context-Sensitive Help Setting' section is also present. The 'Enter Record Name Label and Format' section includes a 'Record Name' field (Payment Name) and a 'Data Type' dropdown (Text).

Home Chatter Libraries Content Subscriptions Passports Visa Slots Payments Reschedules/Cancel +

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- Release Updates
- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Data Classification
- Privacy Center
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Outlook Integration and Sync
- Gmail Integration and Sync

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 Payment Example: Account

Plural Label Payments Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.
Object Name Payment Example: Account

Description

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

Content Name --None--

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 Payment Name Example: Account Name

Data Type Text

Reschedule/Cancel:

The screenshot shows the 'Reschedule/Cancel' Custom Object Definition Edit page in Salesforce. The top navigation bar includes links for Home, Chatter, Libraries, Content, Subscriptions, Passports, Visa Slots, Payments, and Reschedules/Cancel. A banner at the top reads 'It's Better in Lightning' with a 'Tell Me More' button. The left sidebar contains a 'Lightning Experience Transition Assistant' and a 'Salesforce Mobile Quick Start' section. The main content area is titled 'Edit Custom Object: Reschedule/Cancel' and includes a 'Custom Object Definition Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. Below this is the 'Custom Object Information' section, which includes fields for 'Label' (Reschedule/Cancel), 'Plural Label' (Reschedules/Cancel), 'Starts with vowel sound' (unchecked), 'Object Name' (Reschedule_Cancel), and 'Description'. A 'Context-Sensitive Help Setting' section is also present. The 'Enter Record Name Label and Format' section includes a 'Record Name' field (Reschedule/Cancel Name) and a 'Data Type' dropdown (Text).

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Home

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- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Data Classification
- Privacy Center
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
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- Gmail Integration and Sync

Edit Custom Object
Reschedule/Cancel

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 Reschedule/Cancel Example: Account

Plural Label Reschedules/Cancel Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.
Object Name Reschedule_Cancel Example: Account

Description

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

Content Name --None--

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 Reschedule/Cancel Name Example: Account Name

Data Type Text

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:

The screenshot shows the 'Edit Passport Custom Field' page for a field named 'Contact Number'. The page is part of the Salesforce Lightning interface, with a top navigation bar including 'Search', 'Sobiya Arunachalam', 'Setup', 'Help', and 'Content'. Below the navigation bar is a sub-navigation bar with 'Content', 'Subscriptions', 'Passports', 'Visa Slots', 'Payments', and 'Reschedules/Cancel'. The main content area is titled 'Edit Passport Custom Field' and 'Contact Number'. It includes a 'Custom Field Definition Edit' section with buttons for 'Change Field Type', 'Save', and 'Cancel'. The 'Field Information' section contains fields for 'Field Label' (Contact Number), 'Field Name' (Contact_Number), 'Data Type' (Number), 'Description', and 'Help Text'. Below these are dropdowns for 'Data Owner' (User), 'Field Usage' (--None--), 'Data Sensitivity Level' (--None--), and 'Compliance Categorization' (0 selected). The 'General Options' section includes checkboxes for '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), and 'AI Prediction' (Use this field to store AI prediction scores). There is also a 'Default Value' section with a 'Show Formula Editor' button and a text area containing formula syntax examples. The 'Number Options' section includes fields for 'Length' (10) and 'Decimal Places' (0). At the bottom are buttons for 'Change Field Type', 'Save', and 'Cancel'.

Search... Search Sobiya Arunachalam Setup Help Content

Content Subscriptions Passports Visa Slots Payments Reschedules/Cancel

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Edit Passport Custom Field
Contact Number Help for this Page

Custom Field Definition Edit Change Field Type Save Cancel

Field Information Required Information

Field Label Contact Number Data Type Number

Field Name Contact_Number

Description

Help Text

Data Owner User

Field Usage --None--

Data Sensitivity Level --None--

Compliance Categorization 0 selected 0 selected

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 : (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

Number Options

Length 10

Decimal Places 0

Change Field Type Save Cancel

Full name:

Edit Passport Custom Field
Full Name

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:

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

Default Value: Show Formula Editor

Use formula syntax. Enclose text and picklist value API names in double quotes. ("The test") include numbers without quotes. (%20) enter percentages as decimals. (%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.

Passport Number:

Edit Passport Custom Field
Passport Number

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: 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

Default Value: Show Formula Editor

Text Options

Length: 15

Change Field Type Save Cancel

Permanent Address:

Edit Passport Custom Field
Full Name

Custom Field Definition Edit

Field Information

Field Label: Full Name

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

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

Default Value: Show Formula Editor

Use formula syntax. Enclose text and picklist value API names in double quotes. ("the text"), include numbers without quotes (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.RecordName.Field__c

Creation of fields on the custom Object: Visa Slot

Location:

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Home

Administer

- Release Updates
- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Data Classification
- Privacy Center
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Outlook Integration and Sync
- Global Integration and Sync
- Email Administration
- Google Apps
- Analytics
- Data.com Administration

Build

- Customize
- Create

Edit Visa Slot Custom Field
Location

Custom Field Definition Edit

Field Information

Field Label: Location

Field Name: Location

Description:

Help Text:

Data Owner: User

Field Usage: --None--

Data Sensitivity Level: --None--

Compliance Categorization: 0 selected / 0 selected

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

Default Value: Show Formula Editor

Use formula syntax. Enclose text and picklist value API names in double quotes. ("the text"), include numbers without quotes (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.RecordName.Field__c

Text Options

Length: 10

Change Field Type Save Cancel

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

Time

The screenshot displays the Salesforce Lightning Experience interface. At the top, there's a navigation bar with the Salesforce logo, a search bar, and user information (Sobiya Arunachalam). Below this is a secondary navigation bar with tabs: Home, Chatter, Libraries, Content, Subscriptions, Passports, Visa Slots, Payments, and Reschedules/Cancel. A banner below the navigation bar reads "It's Better in Lightning" with a "Tell Me More" button and a "Check Readiness" button.

The main content area is titled "Edit Visa Slot Custom Field" and "Time". It contains a "Custom Field Definition Edit" form. The form has two main sections: "Field Information" and "General Options".

Field Information:

- Field Label: Time
- Field Name: Time
- Description: (empty text area)
- Help Text: (empty text area)
- Data Owner: User (dropdown menu)
- Field Usage: --None-- (dropdown menu)
- Data Sensitivity Level: --None-- (dropdown menu)
- Compliance Categorization: 0 selected (dropdown menu)

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

At the bottom of the form, there are buttons: "Change Field Type", "Save", and "Cancel".

Passport Number(master):

The screenshot shows the Salesforce Lightning Experience interface. The top navigation bar includes 'Home', 'Chatter', 'Libraries', 'Content', 'Subscriptions', 'Passports', 'Visa Slots', 'Payments', and 'Reschedules/Cancel'. A banner at the top reads 'It's Better in Lightning Move to Lightning Experience and give your users a productivity boost.' with buttons for 'Tell Me More' and 'Check Readiness'. The left sidebar contains a search bar, 'Lightning Experience Transition Assistant', and a 'Salesforce Mobile Quick Start' section. The main content area is titled 'Edit Visa Slot Custom Field' and 'Passport number (Master)'. It features a 'Custom Field Definition Edit' form with the following sections:

- Field Information:** Field Label: 'Passport number (Master)', Field Name: 'Passport_number_Master', Data Type: 'Number', Description: (empty), Help Text: (empty), Date Owner: 'User', Field Usage: '-None-', Data Sensitivity Level: '-None-', Compliance Categorization: '0 selected'.
- 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'.
- Number Options:** Length: '18', Decimal Places: '0'.

Buttons at the bottom include 'Change Field Type', 'Save', and 'Cancel'.

Visa slot number:

The screenshot shows the Salesforce Lightning Experience interface. The top navigation bar includes 'Home', 'Chatter', 'Libraries', 'Content', 'Subscriptions', 'Passports', 'Visa Slots', 'Payments', and 'Reschedules/Cancel'. A banner at the top reads 'It's Better in Lightning Move to Lightning Experience and give your users a productivity boost.' with buttons for 'Tell Me More' and 'Check Readiness'. The left sidebar contains a search bar, 'Lightning Experience Transition Assistant', and a 'Salesforce Mobile Quick Start' section. The main content area is titled 'Edit Visa Slot Custom Field' and 'Visa slot number'. It features a 'Custom Field Definition Edit' form with the following sections:

- Field Information:** Field Label: 'Visa slot number', Field Name: 'Visa_slot_number', Data Type: 'Text', Description: (empty), Help Text: (empty), Date Owner: 'User', Field Usage: '-None-', Data Sensitivity Level: '-None-', Compliance Categorization: '0 selected'.
- 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', Default Value: 'Show Formula Editor'.
- Text Options:** Length: '10'.

Buttons at the bottom include 'Change Field Type', 'Save', and 'Cancel'.

Creation of Field on custom Object: Payment

Select our Object from the selection has Passport and select option field and Relationship. Select our data type as text go to the next page enter the field label has Payment Mode 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 payment Field are create like this type.

Payment Mode:

The screenshot displays the Salesforce Lightning interface for creating a custom field. The top navigation bar includes the Salesforce logo, a search bar, and user information (Sobiya Arunachalam). The main navigation menu lists various objects: Home, Chatter, Libraries, Content, Subscriptions, Passports, Visa Slots, Payments, and Reschedules/Cancel. A banner at the top promotes the Lightning Experience with the text "It's Better in Lightning" and "Move to Lightning Experience and give your users a productivity boost." Below the banner, there's a "Quick Find / Search..." bar and a "Lightning Experience Transition Assistant" button. The left sidebar contains a "Salesforce Mobile Quick Start" section and an "Administer" section with various management options like Release Updates, Manage Users, Manage Apps, etc. The main content area is titled "Edit Payment Custom Field" and "Payment Mode". It features a "Custom Field Definition Edit" section with tabs for "Change Field Type", "Save", and "Cancel". The "Field Information" section includes fields for "Field Label" (Payment Mode), "Field Name" (Payment_Mode), "Description", and "Help Text". It also has dropdowns for "Data Owner" (User), "Field Usage" (-None-), "Data Sensitivity Level" (-None-), and "Compliance Categorization" (0 selected). The "General Options" section has checkboxes for "Required" (checked), "Unique" (unchecked), and "External ID" (checked). The "Default Value" section includes a "Show Formula Editor" button and a text area for the formula. The "Text Options" section has a "Length" field set to 10. At the bottom, there are "Change Field Type", "Save", and "Cancel" buttons.

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Home Chatter Libraries Content Subscriptions Passports Visa Slots Payments Reschedules/Cancel

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Home

Administer

- Release Updates
- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Data Classification
- Privacy Center
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Outlook Integration and Sync
- Gmail Integration and Sync
- Email Administration
- Google Apps
- Analytics
- Data.com Administration

Build

- Customize

Edit Payment Custom Field
Payment Mode

Custom Field Definition Edit Change Field Type Save Cancel

Field Information Required 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 0 selected 0 selected

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

Card Number:

The screenshot shows the 'Edit Payment Custom Field' page for 'Card Number'. The page is titled 'Card Number' and has a 'Required Information' icon. The 'Field Information' section includes: Field Label 'Card Number', Field Name 'Card_Number', Description 'Card Number', and Help Text. The 'Data Owner' is 'User', 'Field Usage' is 'None', 'Data Sensitivity Level' is 'None', and 'Compliance Categorization' is '0 selects'. The 'General Options' section includes: 'Required' (checked), 'Unique' (unchecked), 'External ID' (checked), and 'AI Prediction' (unchecked). The 'Default Value' section shows a formula: `IF(AND($RecordType__mdt.RecordAPIName__c = 'Card Number'), $RecordType__mdt.RecordAPIName__c, '')`. The 'Check Syntax' button is visible.

Transaction id(Auto number):

The screenshot shows the 'Edit Payment Custom Field' page for 'Transaction id (Auto number)'. The page is titled 'Transaction id (Auto number)' and has a 'Required Information' icon. The 'Field Information' section includes: Field Label 'Transaction id (Auto number)', Field Name 'Transaction_id_Auto_number', Description 'Transaction id (Auto number)', and Help Text. The 'Data Owner' is 'User', 'Field Usage' is 'None', 'Data Sensitivity Level' is 'None', and 'Compliance Categorization' is '0 selects'. The 'General Options' section includes: 'Required' (checked), 'Unique' (checked), 'External ID' (checked), and 'AI Prediction' (unchecked). The 'Default Value' section shows a formula: `IF(AND($RecordType__mdt.RecordAPIName__c = 'Transaction id (Auto number)'), $RecordType__mdt.RecordAPIName__c, '')`. The 'Check Syntax' button is visible.

Cancel transaction:

The screenshot displays the Salesforce Lightning Experience interface. The top navigation bar includes the Salesforce logo, a search bar, and user information for 'Sobhya Arunachalam'. The main navigation menu on the left lists various administrative tasks. The central content area shows the 'Custom Field Definition Edit' page for a field named 'Cancel Transaction'. The 'Field Information' section includes fields for Field Label, Field Name, Description, and Help Text. The 'Data Owner' is set to 'User', and 'Field Usage' is set to 'None'. The 'General Options' section includes checkboxes for 'Required', 'Unique', and 'External ID'. The 'Text Options' section shows a 'Length' of 10.

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Home

Administer

- Release Updates
- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Data Classification
- Privacy Center
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Outlook Integration and Sync
- Gmail Integration and Sync
- Email Administration
- Google Apps
- Analytics
- Data.com Administration

Build

- Customize
- Create

Custom Field Definition Edit
Change Field Type Save Cancel

Field Information

Field Label Cancel Transaction Data Type Text

Field Name Cancel Transaction

Description

Help Text

Data Owner User

Field Usage None

Data Sensitivity Level None

Compliance Categorization 0 selected

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

Visa slot number(master)

The screenshot displays the Salesforce Lightning Experience interface. The top navigation bar includes the Salesforce logo, a search bar, and user information for 'Sobhya Arunachalam'. The main navigation menu on the left lists various administrative tasks. The central content area shows the 'Custom Field Definition Edit' page for a field named 'Visa slot number'. The 'Field Information' section includes fields for Field Label, Field Name, Description, and Help Text. The 'Data Owner' is set to 'User', and 'Field Usage' is set to 'None'. The 'General Options' section includes checkboxes for 'Required', 'Unique', and 'External ID'. The 'Text Options' section shows a 'Length' of 10.

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Home

Administer

- Release Updates
- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Data Classification
- Privacy Center
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Outlook Integration and Sync
- Gmail Integration and Sync
- Email Administration
- Google Apps
- Analytics
- Data.com Administration

Build

- Customize
- Create

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 0 selected

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](#)

Select Field Type Insert Field

Select field type -- -- Insert Merge Field -- -- Insert Operator --

Check Syntax

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

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.

Search...

Search

Sobiya Arunachalam ▾ Setup Help Content ▾

Home Chatter Libraries Content Subscriptions Passports Visa Slots Payments Reschedules/Cancel +

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Get Started

Salesforce Mobile Quick Start

Home

Administer

Release Updates

Manage Users

Manage Apps

Manage Territories

Company Profile

Data Classification

Privacy Center

Security Controls

Domain Management

Communication Templates

Translation Workbench

Data Management

Mobile Administration

Desktop Administration

Outlook Integration and Sync

Gmail Integration and Sync

Email Administration

Google Apps

Analytics

Data.com Administration

Build

Customize

Create

Edit Reschedule/Cancel Custom Field

Passport number (Master)

Help for this Page ?

Custom Field Definition Edit

Change Field Type Save Cancel

Field Information

Required 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

0 selected

0 selected

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

Location:

salesforce 23 Search... Sobhya Arunachalam Setup Help Content

Home Chatter Libraries Content Subscriptions Passports Visa Slots Payments Reschedules/Cancel

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Get Started

Salesforce Mobile Quick Start

Home

Administer

- Release Updates
- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Data Classification
- Privacy Center
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Outlook Integration and Sync
- Email Integration and Sync
- Email Administration
- Google Apps
- Analytics
- Data.com Administration

Build

- Customize
- Create

Edit Reschedule/Cancel 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 --None--

Compliance Level 0 selected 0 selected

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

Time:

salesforce 23 Search... Sobhya Arunachalam Setup Help Content

Home Chatter Libraries Content Subscriptions Passports Visa Slots Payments Reschedules/Cancel

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Home

Administer

- Release Updates
- Manage Users
- Manage Apps
- Manage Territories
- Company Profile
- Data Classification
- Privacy Center
- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Outlook Integration and Sync
- Email Integration and Sync
- Email Administration
- Google Apps
- Analytics
- Data.com Administration

Build

- Customize
- Create

Edit Visa Slot Custom Field
Time

Custom Field Definition Edit Change Field Type Save Cancel

Field Information

Field Label Time Data Type Text

Field Name Time

Description

Help Text

Data Owner User

Field Usage --None--

Data Sensitivity --None--

Compliance Level 0 selected 0 selected

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

Cancel:

Cancel

Custom Field Definition Edit

Field Information

Field Label: Data Type: Text

Field Name:

Description:

Help Text:

Data Owner:

Field Usage:

Date 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:

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:

[Change Field Type](#) [Save](#) [Cancel](#)

Status:

Status

Custom Field Definition Edit

Field Information

Field Label: Data Type: Text

Field Name:

Description:

Help Text:

Data Owner:

Field Usage:

Date 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:

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

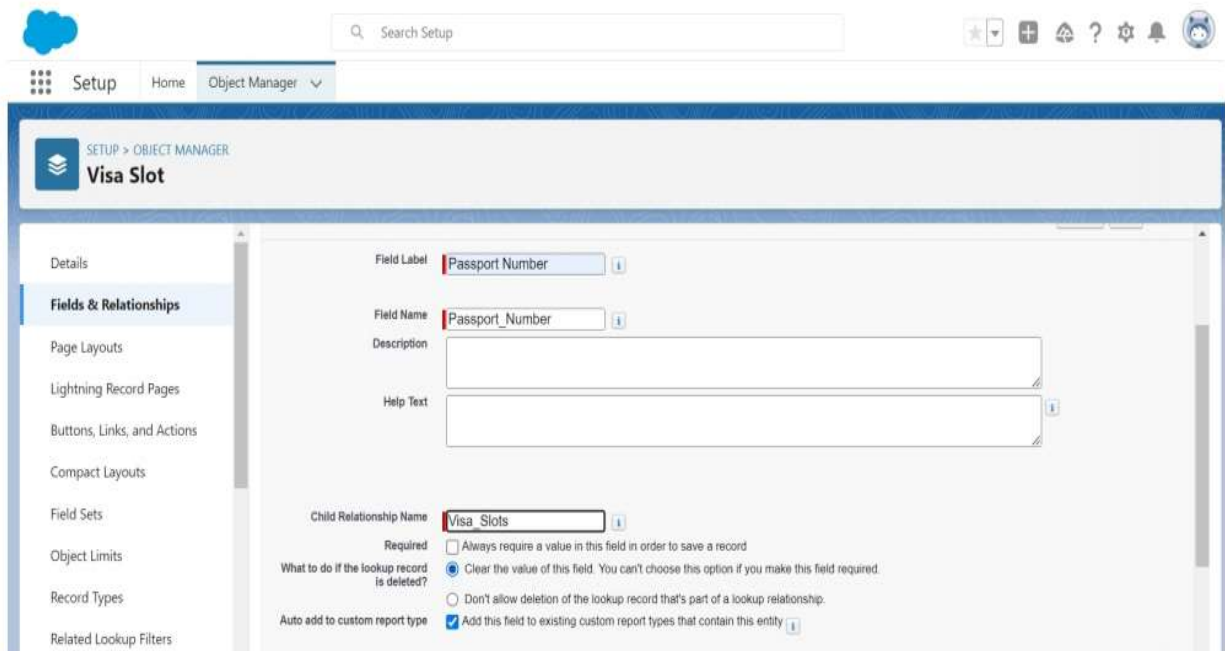
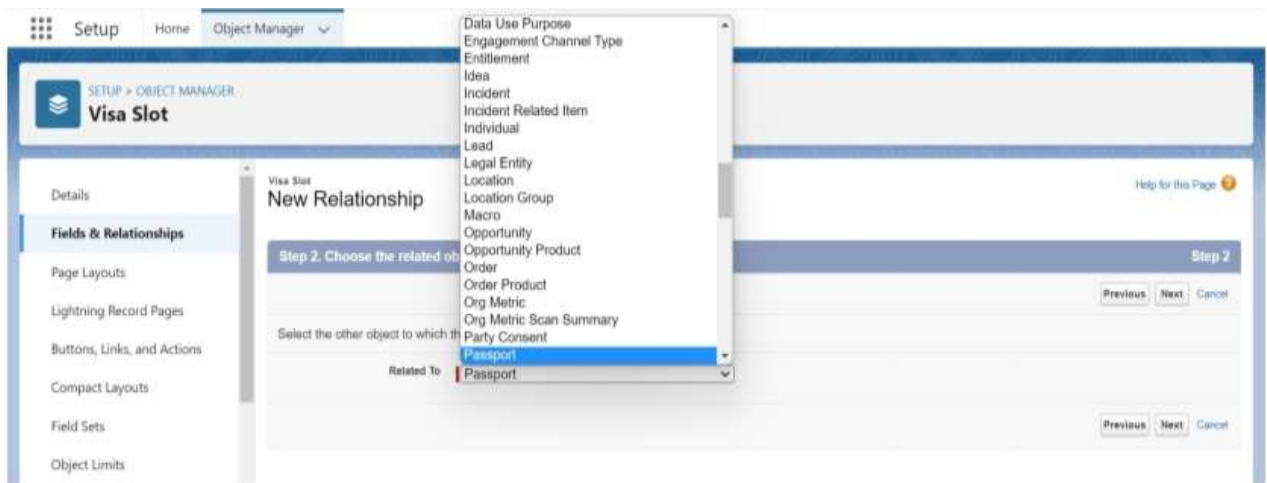
Text Options

Length:

[Change Field Type](#) [Save](#) [Cancel](#)

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 go to the next page and save it. To create the relationship between payment and visa slot in this type.



Master Detail relationship between payment and Visa:

The screenshot displays the Salesforce Lightning Experience interface. At the top, there's a navigation bar with the Salesforce logo, a search bar, and user information (Sobiya Arunachalam). Below this is a secondary navigation bar with links to Home, Chatter, Libraries, Content, Subscriptions, Passports, Visa Slots, Payments, and Reschedules/Cancel. A banner at the top reads "It's Better in Lightning" with a "Check Readiness" button.

The main content area is titled "Edit Payment Custom Field" and "Visa slot". It features a "Custom Field Definition Edit" section with fields for Field Label (Visa slot), Field Name (Visa_slot), Description, Help Text, Data Owner (User), Field Usage (-None-), Data Sensitivity Level (-None-), and Compliance Categorization (0 selected). A "Master-Detail Options" section includes "Related To" (Visa Slot), "Child Relationship Name" (Payments), "Related List Label" (Payments), and "Sharing Setting" (Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records). A "Lookup Filter" section is also present.

On the left side, there's a sidebar with a "Lightning Experience Transition Assistant" and a "Salesforce Mobile Quick Start" section. The sidebar also includes a navigation menu with links to Home, Administer (Release Updates, Manage Users, Manage Apps, Manage Territories, Company Profile, Data Classification, Privacy Center, Security Controls, Domain Management, Communication Templates, Translation Workbench, Data Management, Mobile Administration, Desktop Administration, Outlook Integration and Sync, Gmail Integration and Sync, Email Administration, Google Apps, Analytics, Data.com Administration), and Build (Customize, Create).

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.


New Lightning App

*** App Name** ⓘ

*** Developer Name** ⓘ

Description ⓘ

Image ⓘ



[Clear](#)

Primary Color Hex Value ⓘ

■

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

Progress bar with 5 dots, the first is active.

Next

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

- Accounts
- Alert Settings
- All Sites
- Alternative Payment Methods
- App Launcher
- Appointment Invitations
- Approval Requests

Selected Items

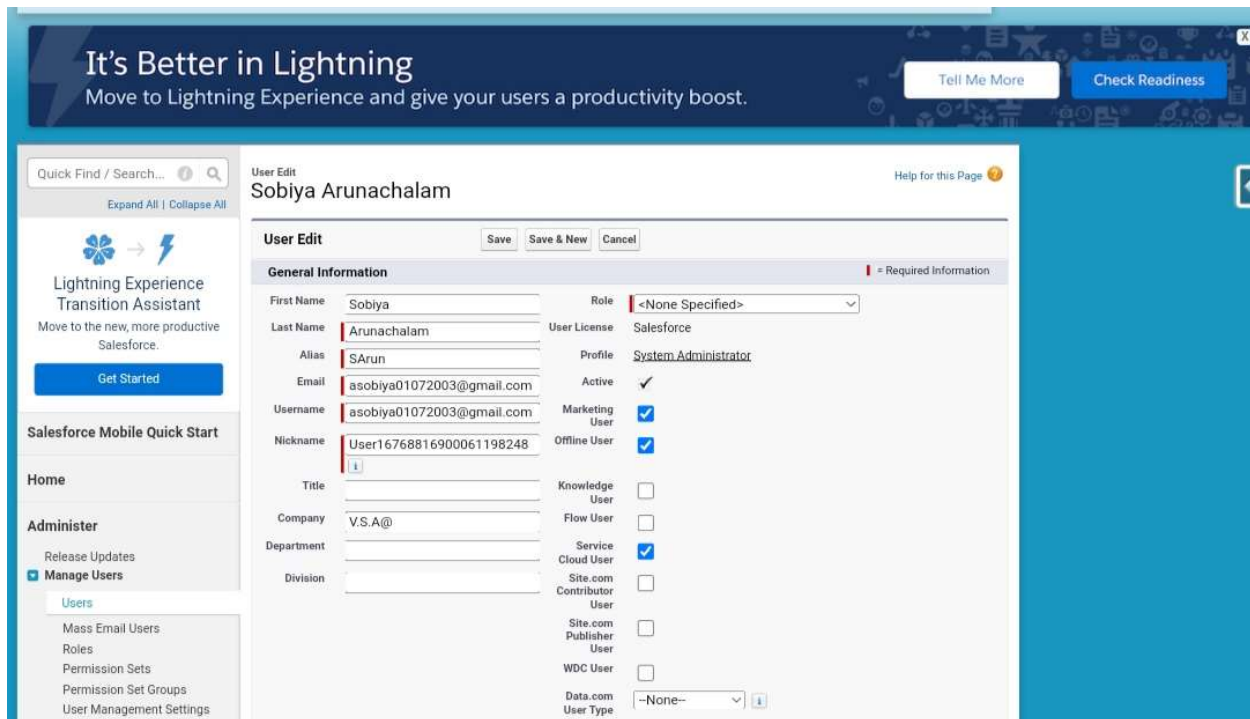
- Passports
- Visa Slots
- Payments
- Reschedules/Cancel

Navigation arrows: left, right, up, down.

Navigation arrows: up, down.

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.



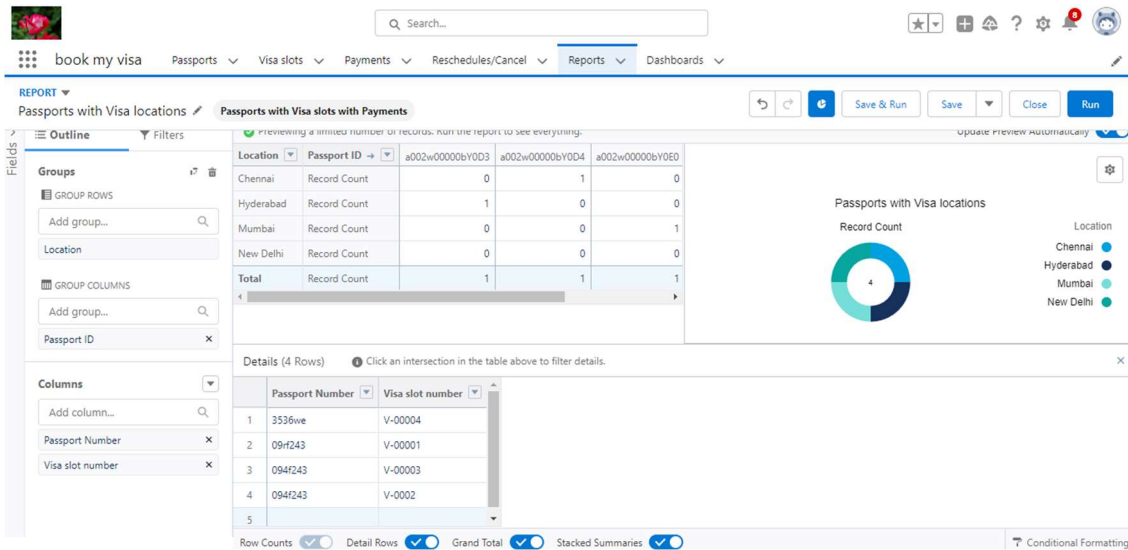
OWD: Organization wide default settings

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 report and click new report select the report type as passport with visa slot with payment and 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:passport number to 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.

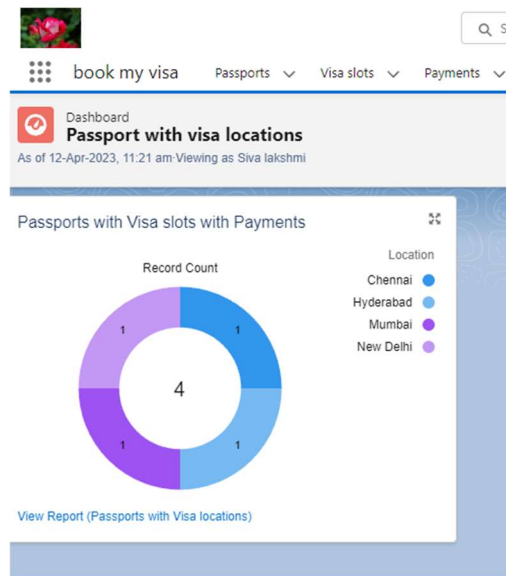
Passports with Visa locations-2023-04-12-11-37-34 - Microsoft Excel

Passport ID →	a002w00000bY0D	a002w00000bY0D	a002w00000bY0E	a002w00000bY0E	Total
Location	Record Count	Record Count	Record Count	Record Count	Record Count
Chennai	0	1	0	0	1
Hyderabad	1	0	0	0	1
Mumbai	0	0	1	0	1
New Delhi	0	0	0	1	1
Total	1	1	1	1	4

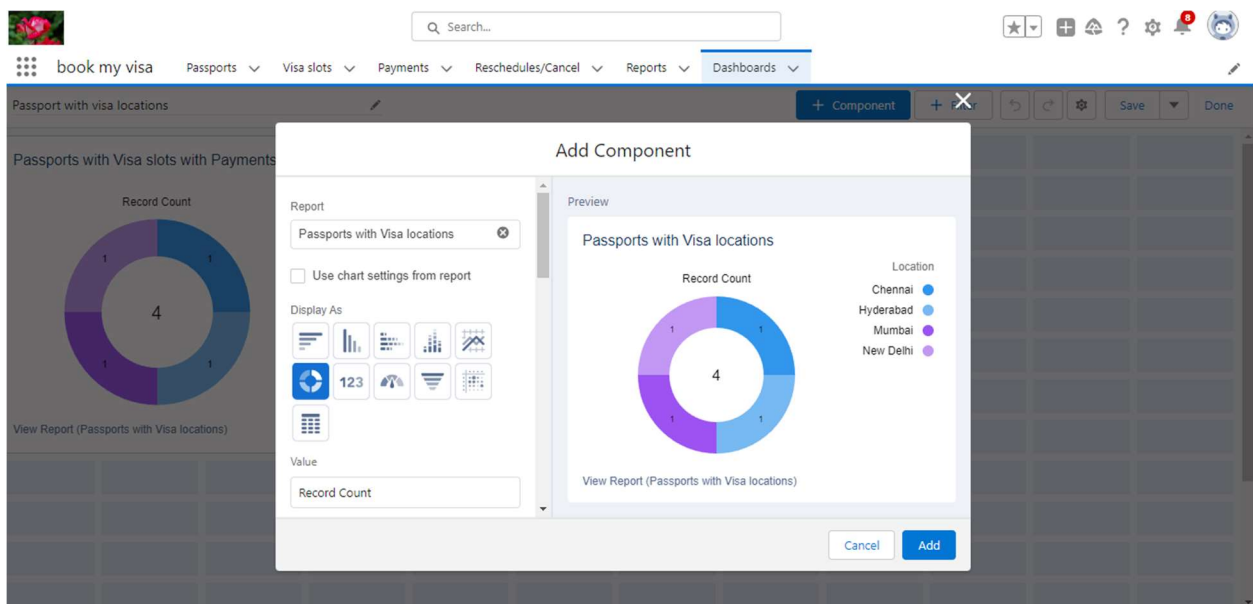
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7. create a Dashboard

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.



TRAILHEAD PROFILE PUBLIC URL:

Team leader : P. Sivalakshmi : <https://trailblazer.me/id/slakshmi293>

Team member : A. Sobiya : <https://trailblazer.me/id/sobiya1>

Team member : K. Srija : <https://trailblazer.me/id/skannan100>

Team member : K. Tamilarasi : <https://trailblazer.me/id/tamik31>

Advantages:

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

Disadvantages:

- Internet connection problem is there.
- Poor connection leads to trouble and anxiety.
- Poor communication.
- Lack of leadership.
- Burdensome data entry.
- Can be costly.

Applications:

This will help you to track and manage the availability of visa slot, which are appointments that are required for certain Visa applications.

CRM is a well conceived business strategy with long term outcomes that maximize profitability, revenue and customer satisfaction by organising around customer segment, fostering customer satisfying actions and implementing customer centric process.

CRM is a strategy employed to learn and understand customer's needs, wants and behaviour in order to develop stronger and sustained relationship with them.

Conclusion:

By using the CRM application, we should track and manage the availability of Visa slots easily. Booking of visa slots will be in an easier way.

It is a beneficial and useful one for the customers. Save the time and often visiting trouble is not there.

Future Scope:

- ✓ In future, it will be really a useful app and application in booking a Visa Slot.
- ✓ It is trusted to be in future, everyone will utilize this.
- ✓ The customer will set good service and make it trust worthy.
- ✓ Hope, it would fulfil all the needs of the users.

