

CRM APPLICATIONS THAT HELPS TO BOOK A VISA SLOTS

1.INTRODUCTION

1.1 OVERVIEW

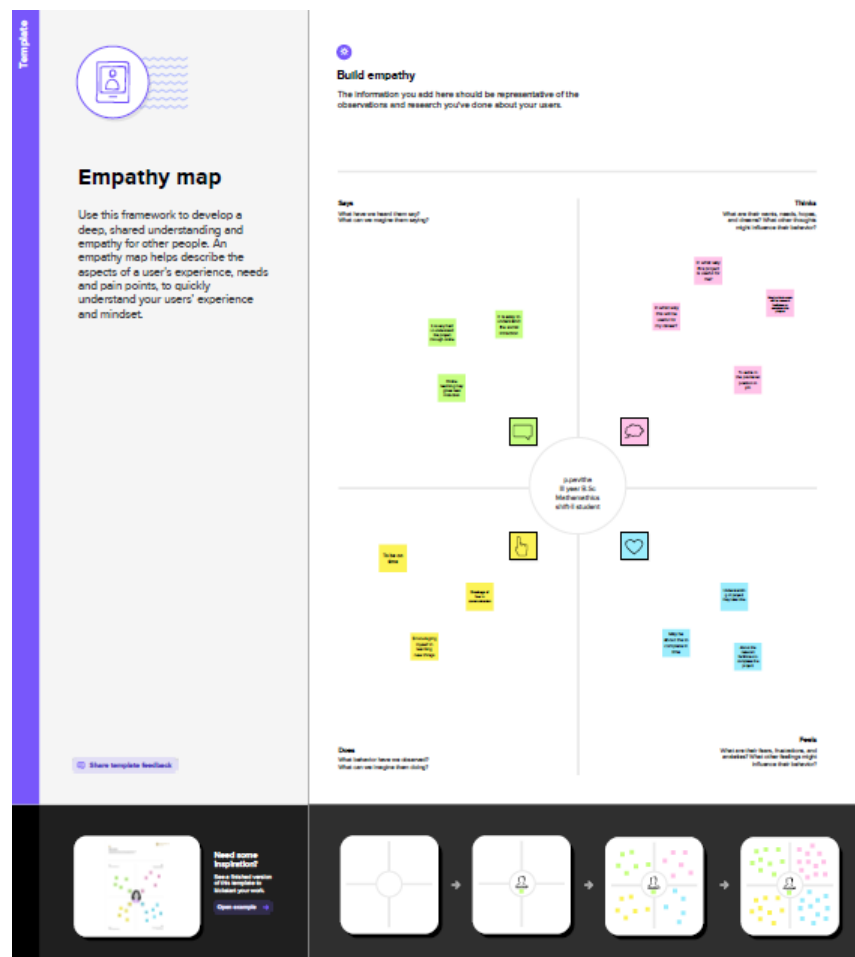
A visa slot management project is a system that is used to track and manage the availability of visa slots, which are appointments that are required for certain visa applications. It might be used by a government agency or a visa processing center to schedule and manage appointments with applicants

1.2 PURPOSE

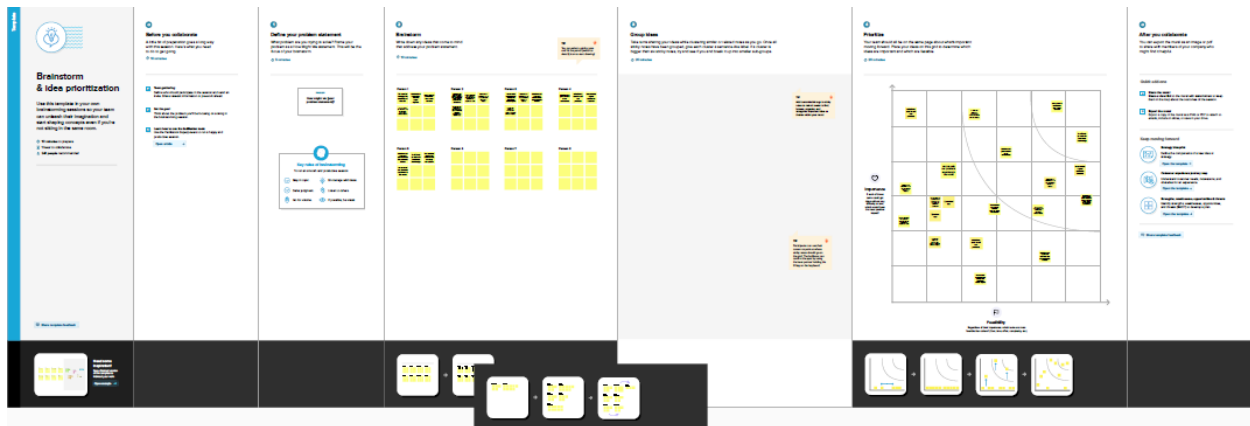
A visa is an official document that allows the bearer to legally enter a foreign country. The visa is usually stamped or glued into the bearer's passport. There are several different types of visas, each of which afford the bearer different rights in the host country.

2. PROBLEM DEFINITION & DESIGN THINKING

2.1 EMPATHY MAP



2.2 IDEATION & BRAINSTORMING MAP



RESULT

3.1 DATA MODEL

OBJECT	FIELD IN THE OBJECT	
OBJECT 1	<i>Field name</i>	<i>Data type</i>
	Contact number	number
OBJECT 2	<i>Field name</i>	<i>Data type</i>
	Full name	text
OBJECT 3	<i>Field name</i>	<i>Data type</i>
	Passport	Text
OBJECT 4	<i>Field name</i>	<i>Date type</i>
	permanent	text

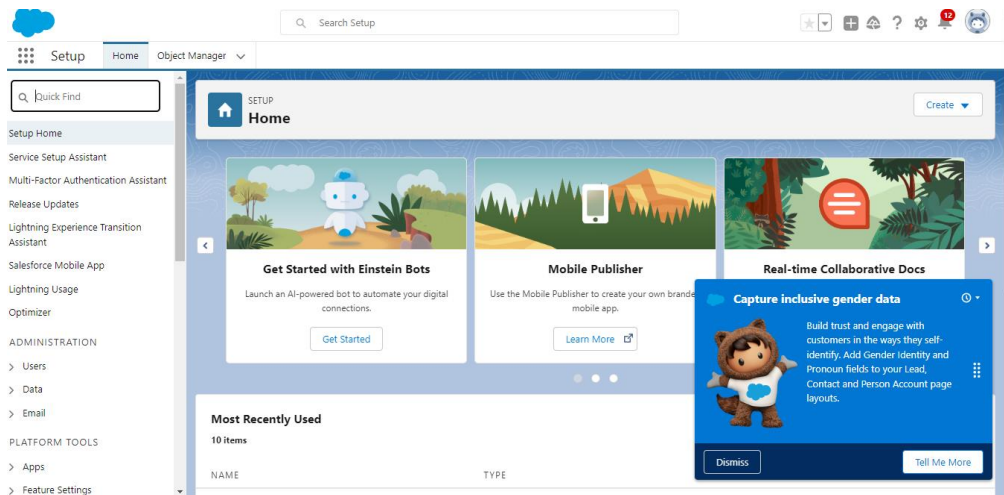
3.2 ACTIVITY & SCREENSHOT

Milestone 1

Activity 1 Creating Developer Account

Creating a developer org in salesforce.

1. Go to developers.salesforce.com/
 2. Click on sign up.
 3. On the sign up form, enter the following details :
 1. First name & Last name
 2. Email
 3. Role : Developer
 4. Company : College Name
 5. County : India
 6. Postal Code : pin code
 7. Username : should be a combination of your name and company
- This need not be an actual email id, you can give anything in the format : username@organization.com



MILESTONE -2

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.*

SETUP New Custom Object

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

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

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

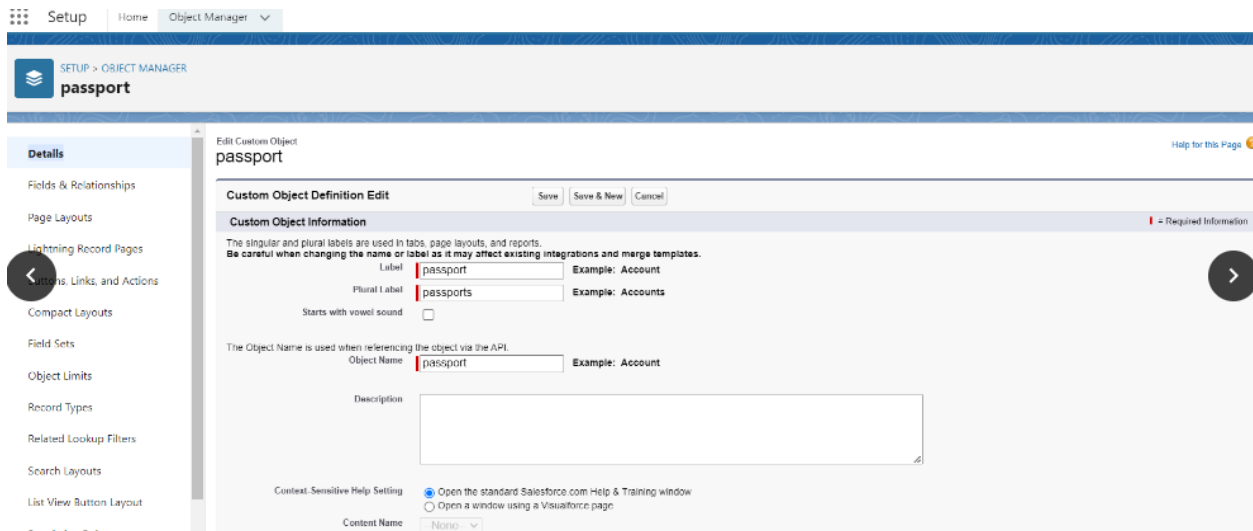
Example: Account

Description

ACTIVITY 2

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.



Setup Home Object Manager

SETUP > OBJECT MANAGER
passport

Details

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout

Edit Custom Object
passport

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

Milestone-3: Relationship B/w Objects:

Activity-1:

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

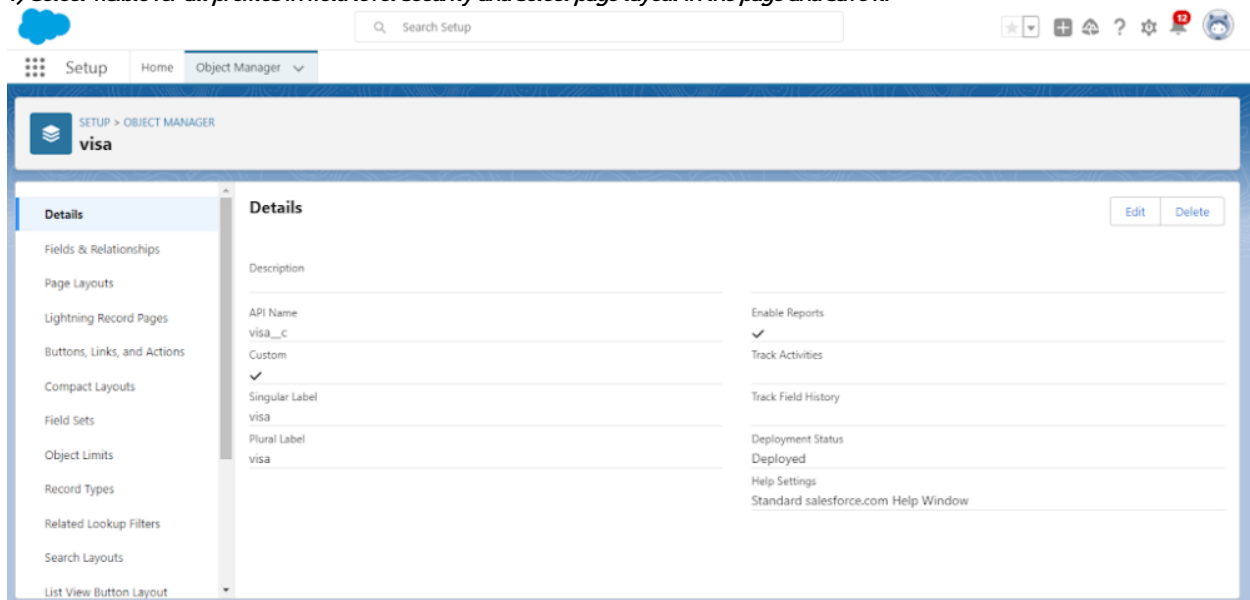
3) And select fields and relationships and click on new

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 the page and save it.



Setup Home Object Manager

SETUP > OBJECT MANAGER
visa

Details

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Details

Description

API Name visa__c

Custom ☒

Singular Label visa

Plural Label visa

Enable Reports ☒

Track Activities ☒

Track Field History ☐

Deployment Status Deployed

Help Settings Standard salesforce.com Help Window

Milestone-4 App:

Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It

has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs. There are two types of Salesforce Applications:

ACTIVITY -1

Creation of App

An app is a collection of items that work together to serve a particular function. Salesforce apps come in two flavors: Classic and Lightning.

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

	App Name ↑	Developer Name	Description	Last Modified ...	App Type	Vi...
14	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	31/03/2023, 3:49 pm	Lightning	✓
15	Marketing	Marketing	Best-in-class on-demand marketing automation	31/03/2023, 3:49 pm	Classic	✓
16	Platform	Platform	The fundamental Lightning Platform	31/03/2023, 3:49 pm	Classic	
17	Playground Starter	Playground_Starter	Get started with your Trailhead Playground.	31/03/2023, 3:49 pm	Lightning (Managed)	✓
18	Sales	Sales	The world's most popular sales force automation (SFA) solution	31/03/2023, 3:49 pm	Classic	
19	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	31/03/2023, 3:52 pm	Lightning	✓
20	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	31/03/2023, 3:49 pm	Lightning	✓

Milestone-5 User:

Activity-1:

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

New User

[Help for this Page](#)

User Edit Save Save & New Cancel

General Information Required Information

First Name	<input type="text"/>	Role	<None Specified> ?
Last Name	<input type="text"/>	User License	Identity
Alias	<input type="text"/>	Profile	Identity User ?
Email	<input type="text"/>	Active	<input checked="" type="checkbox"/>
Username	<input type="text"/>	Marketing User	<input type="checkbox"/>
Nickname	<input type="text"/> ?	Offline User	<input type="checkbox"/>
Title	<input type="text"/>	Knowledge User	<input type="checkbox"/>
Company	<input type="text"/>	Flow User	<input type="checkbox"/>
Department	<input type="text"/>	Service Cloud User	<input type="checkbox"/>
Division	<input type="text"/>	Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	--None-- ?
		Data.com Monthly Addition Limit	Default Limit (300) ?
		Accessibility Mode (Classic Only)	<input type="checkbox"/> ?
		High-Contrast Palette on Charts	<input type="checkbox"/> ?

Activity-2:

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.

SETUP
Sharing Settings

Sharing Settings

[Help for this Page](#)

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: All Objects

Disable External Sharing Model

Default Sharing Settings

Organization-Wide Defaults Edit Organization-Wide Defaults Help

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Account and Contract	Public Read/Write	Private	<input checked="" type="checkbox"/>
Contact	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Order	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Asset	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Opportunity	Public Read/Write	Private	<input checked="" type="checkbox"/>
Case	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Campaign	Public Read/Write	Private	<input checked="" type="checkbox"/>

Milestone-6 Reports

Activity-1: Creation of report

- 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.

The screenshot shows the Salesforce 'Reports & Dashboards' section. On the left is a sidebar with navigation links: Analytics, Reports & Dashboards (selected), Access Policies, Historical Trending, Report Types, Reporting Snapshots, and Settings. Below the sidebar is a message: 'didn't find what you're looking for? try using Global Search.' The main content area is titled 'Sharing Settings' and includes a description: 'This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.' Below this is a dropdown menu for 'Manage sharing settings for:' set to 'All Objects' and a button 'Disable External Sharing Model'. The 'Default Sharing Settings' section features a table for 'Organization-Wide Defaults' with columns for Object, Default Internal Access, Default External Access, and Grant Access Using Hierarchies. The table lists various objects and their default access levels.


Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓

Milestone-7 Dashboard

Activity

Creation of Dashboard

- 1) Click on the app launcher and search for dashboards
- 3) Select the new dashboard option.
- 4) Name the dashboard has a Passport with visa location
- 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


SETUP

Reports and Dashboards Settings

Report and Dashboard User Interface Settings Help for this Page

Modify the behavior of the user interface for report and dashboard pages using the following settings:

User Interface

- ☒ Enable Floating Report Headers (Salesforce Classic only)
- ☒ Enable Dashboard Finder
- ☐ Hides the option to export a report in XLS format in Lightning Experience
- ☒ Enable inline Editing in Reports (Lightning Experience Only)

Confidential Information Disclaimer Settings

Specify whether or not to exclude a disclaimer that says "Confidential Information - Do Not Distribute" from report footers.

- ☐ Exclude Disclaimer from Formatted Report Exports in Lightning Experience
- ☐ Exclude Disclaimer from Report Run Pages and from Printable View Pages (Salesforce Classic Only)

Chatter Options

- ☐ Enable Dashboard Component Snapshots

Unified Analytics Home

- ☒ Show preview thumbnails for reports and lightning dashboards
- ☐ Enable the Unified Experience for Analytics Home

Save

Cancel

4. TRAILHEAD PROFILE PUBLIC URL

Team lead – <https://trailblazer.me/id/sagufta>

Team member 1 - <https://trailblazer.me/id/ppavi97>

Team member 2 – <https://trailblazer.me/id/rmani179>

Team member 3 – <https://trailblazer.me/id/vishg34>

Team member 4 – <https://trailblazer.me/id/shree21>

5. ADVANTAGES & DISADVANTAGES

ADVANTAGES

- **Reservation can be minimized anytime**
- **Conveniently manage everything through a single screen.**
- **You get paid before providing services.**
- **Cuts the overloads of the staff's members.**
- **Get valuable insight about your business**

DISADVANTAGES

- *Need a good internet connection.*
- *High competition on the market.*
- *Not every online booking system is equal, so you have to choose the best one as per your business.*

6.APPLICATIONS

- *All applicants are processed as efficiently as possible and the U.S embassy or consulate strives to keep the wait time for appointments as short as possible.*
- *That said , the earlier you book your appointments ,the more likely you are to be able to get the interview date and time you want.*
- *Applicants renewing any visa in the same category within 48 days of expiration are eligible for interview waiver*
- *Adjudicating consular officers may request an in-person interview if additional information is required from applicants*

7.CONCLUSION

Purpose for visa applicants , you should conclude by starting your passion ,willingness and readiness to pursue your desired course at the college of your choice

8. FUTURE SCOPE

When it comes to future of master card & visa cards in India , Rupay has taken an initiative to end the benefits which are actually realized by American payment companies.

As the electronic payment ecosystem grew, visa & master card have developed a payment infrastructure that connects consumers , businesses and financial institutions along with all other players in the payments value chain.