

# PROJECT REPORT

## CRM APPLICATION THAT HELPS TO BOOK A VISA SLOT VIEW

### 1 INTRODUCTION

#### 1.1 OVERVIEW

**CRM** system like Agentics helps you in accumulating all your business data. **CRM** system makes organizing data and processing student VISA applications as simple as a child's play. You can also upload various student-related data. All the data are stored in the same place. Thus, the **CRM** system helps in avoiding any misplacement of data.

#### 1.2 PURPOSE

This can include personal details, visa application history, and other relevant information. This makes it easy for visa officers to access the required information quickly and accurately.

This can help reduce the workload on visa officers and ensure that customers receive timely updates about their visa application status.

This can help visa officers provide better customer service and address any concerns or issues that customers may have.

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### 2 PROBLEM DEFINITION & DESIGN THINKING

#### 2.1 EMPATHY MAP



OBJECT NAME	FIELDS IN THE OBJECT	
PASSPORT		
	FIELD LABEL	DATA TYPE
	1.Full Name 2.Passport Number 3.Permanent Address	Text
	1.Contact Number	Number
VISA SLOT		
	FIELD LABEL	DATA TYPE
	1.Location 2.Passport Nmuber 3.Visa slot number	Text
	1.Time	Time

PAYMENT	<table><tr><th>FIELD LABEL</th><th>DATA TYPE</th></tr><tr><td>1.Payment mode 2.Transaction ID 3.Cancel Transaction 4. Visa slot number</td><td>Text</td></tr><tr><td>1.Card Number</td><td>Number</td></tr></table>	FIELD LABEL	DATA TYPE	1.Payment mode 2.Transaction ID 3.Cancel Transaction 4. Visa slot number	Text	1.Card Number	Number
	FIELD LABEL	DATA TYPE					
	1.Payment mode 2.Transaction ID 3.Cancel Transaction 4. Visa slot number	Text					
1.Card Number	Number						
RESCHEDULE/ CANCEL	<table><tr><th>FIELD LABEL</th><th>DATA TYPE</th></tr><tr><td>1.Passport Number 2.Location 3.Cancel 4.Status</td><td>Text</td></tr><tr><td>1.Time</td><td>Time</td></tr></table>	FIELD LABEL	DATA TYPE	1.Passport Number 2.Location 3.Cancel 4.Status	Text	1.Time	Time
FIELD LABEL	DATA TYPE						
1.Passport Number 2.Location 3.Cancel 4.Status	Text						
1.Time	Time						

### 3.2 ACTIVITY & SCREENSHOT

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

**Details**

Description

API Name  
Passport\_\_c

Custom  
✓

Singular Label  
Passport

Plural Label  
Passports

Enable Reports  
✓

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Passport**

**Fields & Relationships**

7 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEX
contact number	contact_number__c	Number(10, 0)		
Created By	CreatedById	Lookup(User)		
Full Name	Full_Name__c	Text(50)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Passport Number	Name	Text(80)		✓
permanent address	permanent_address__c	Long Text Area(32768)		

Setup

Home

Object Manager

Search Setup

SETUP > OBJECT MANAGER

visa slot

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

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Search Layouts

List View Button Layout

Details

Description

API Name  
visa\_slot\_\_c

Custom

Singular Label  
visa slot

Plural Label  
visa slots

Enable Reports  
✓

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

Search

33°C Sunny

SETUP > OBJECT MANAGER

visa slot

Details

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Fields & Relationships

8 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INITIAL VALUE
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
location	location__c	Text(50)		
passport number	passport_number__c	Master-Detail(Passport)		✓
passport number (master)	passport_number_master__c	Text(50)		
time	time__c	Time		
visa slot Name	Name	Text(80)		✓
visa slot number	visa_slot_number__c	Text(50)		

Search

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Welcome to Salesforce: VeNaanmudhalvan - SmartIntpurpose of CRM APPLICATCRM for Visa BookingsInbox (3) - arun989441159payment | Salesforce

governmentartscollegesale14-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w00...

Search Setup

SetupHomeObject Manager

SETUP > OBJECT MANAGER  
payment

Details

Fields & Relationships  
Page Layouts  
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Search Layouts  
List View Button Layout

Details

Description

API Name  
payment\_\_c

Custom

✓

Singular Label  
payment

Plural Label  
payments

Enable Reports  
✓

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

Search

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List View Button Layout

Fields & Relationships

9 Items, Sorted by Field Label

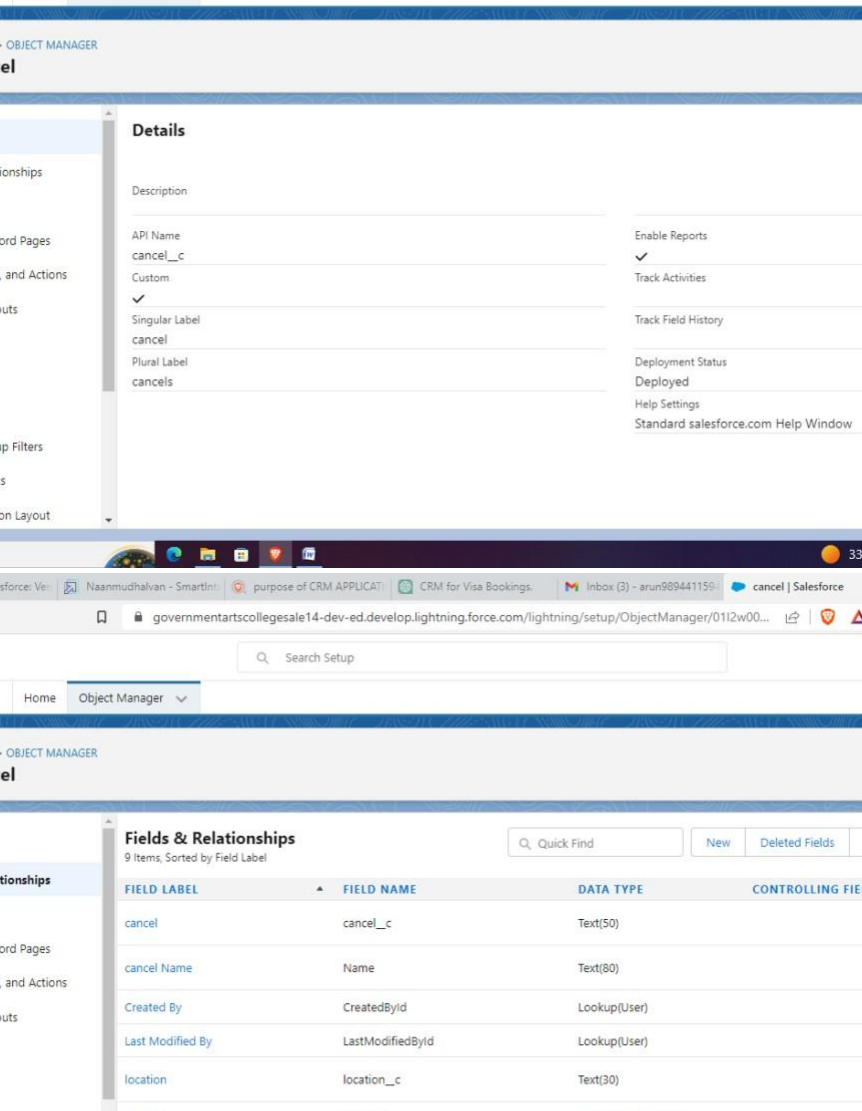
Quick Find

NewDeleted FieldsField Dependencies

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Cancel transaction	Cancel_transaction__c	Text(50)		
Card number	Card_number__c	Number(16, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
payment mode	payment_mode__c	Text(30)		
payment Name	Name	Text(80)		✓
Transaction id	Transaction_id__c	Text(40)		

Search

33°C Sunny



**cancel**

**Details**

Fields & Relationships

Page Layouts

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**Details**

Description

API Name  
cancel\_\_c

Custom  
✓

Singular Label  
cancel

Plural Label  
cancels

Enable Reports  
✓

Track Activities

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Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

**Fields & Relationships**

9 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
cancel	cancel__c	Text(50)		
cancel Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
location	location__c	Text(30)		
Owner	OwnerId	Lookup(User,Group)		✓
passport number (master)	passport_number_master__c	Text(50)		
status	status__c	Text(50)		



Windows taskbar and browser tabs are visible at the top. The browser address bar shows the URL: `governmentartscollegesale14-dev-ed.develop.lightning.force.com/lightning/o/Passport_c/list?filterName=R...`

The application header includes a navigation menu with items: `book my visa`, `Passports` (selected), `visa slots`, `payments`, and `cancels`.

The main content area is titled `Passports Recently Viewed` and shows 0 items. A message states: "You haven't viewed any Passports recently. Try switching list views."

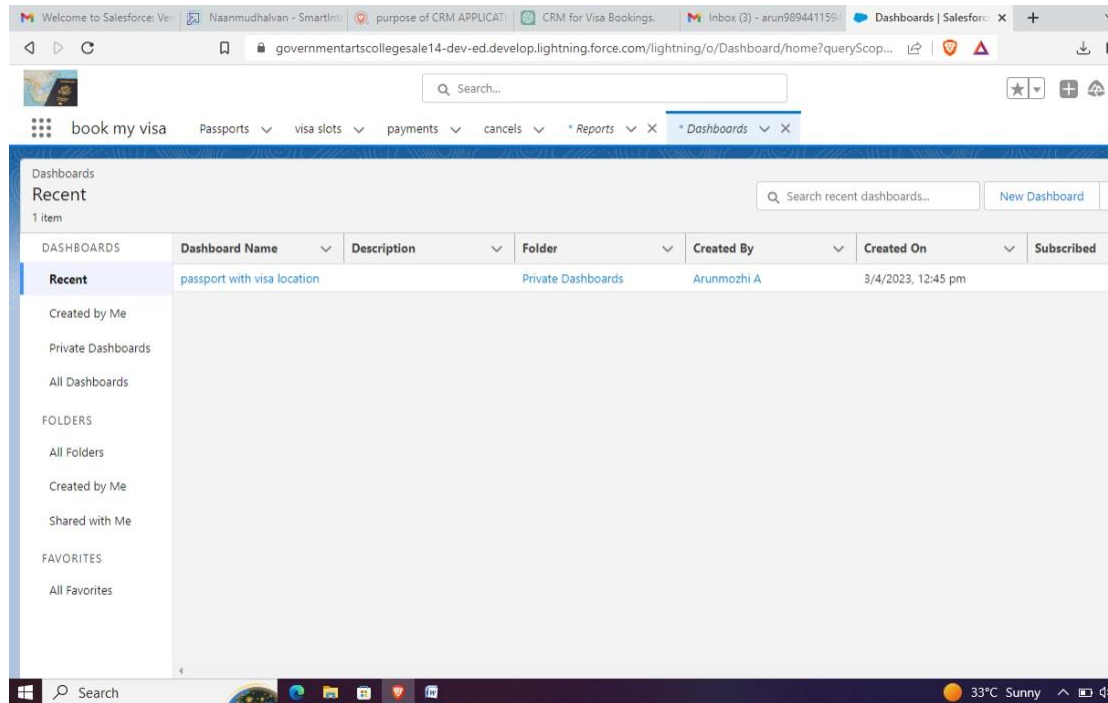
The browser address bar shows the URL: `governmentartscollegesale14-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru`

The application header includes a navigation menu with items: `book my visa`, `Passports`, `visa slots`, `payments`, `cancels`, and `* Reports` (selected).

The main content area is titled `Reports Recent` and shows 1 item. A table lists the recent reports:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Passports with visa slots Report		Private Reports	Arunmozhi A	3/4/2023, 12:43 pm	

The left sidebar contains a navigation menu with categories: `REPORTS`, `FOLDERS`, and `FAVORITES`. Under `REPORTS`, there is a list of report types: `Recent`, `Created by Me`, `Private Reports`, `Public Reports`, and `All Reports`. Under `FOLDERS`, there is a list of folders: `All Folders`, `Created by Me`, and `Shared with Me`. Under `FAVORITES`, there is a list of favorites: `All Favorites`.



#### 4 TRAILHEAD PROFILE PUBLIC URL

Team Lead : <https://trailblazer.me/id/deraj57>

Team Member 1: <https://trailblazer.me/id/kuvel6>

Team Member 2: <https://trailblazer.me/id/gdhanushm>

Team Member 3: <https://trailblazer.me/id/gkali41>

#### 5 ADVANTAGES

A CRM application can help you streamline the visa application process, making it easier and more convenient for your customers to book their visa slots. This can result in a better overall customer experience, which can help build customer loyalty and improve your reputation.

A CRM application can help you keep track of all the information related to each visa application, including customer details, visa requirements, and appointment schedules.

A CRM application can help you communicate with your customers more effectively, providing them with timely updates on their application status and any changes to the visa requirements

A CRM application can help you store sensitive customer information securely, reducing the risk of data breaches and identity theft.

## **DISADVANTAGES**

CRM applications can be complex to set up and use, particularly for users who are not familiar with the technology or who have limited technical skills. This can lead to a steep learning curve and may require additional training for staff members.

If you are using an existing system to manage visa applications, integrating a new CRM application may require significant time and effort to ensure that all data is transferred correctly and that the new system is fully integrated with existing processes.

While most CRM applications are highly customizable, making changes to the system can be time-consuming and may require the assistance of technical experts. This can limit your ability to make changes quickly and easily.

While a CRM application can improve data security, it can also pose a security risk if not properly secured. If your system is hacked or otherwise compromised, customer data could be stolen or used for fraudulent purposes.

## **6 APPLICATIONS**

Online booking : A CRM application can be used to create an online portal for visa applicants to book their visa slots

This can help reduce wait times and improve customer satisfaction.

A CRM application can be used to send automated emails or SMS messages to visa applicants, providing them with reminders about their appointments, updates on visa requirements, and other relevant information

## **7 CONCLUSION**

CRM application can help you streamline your visa booking process, improve customer satisfaction, and increase efficiency, making it a valuable tool for any visa service provider.

CRM application can offer many benefits for visa service providers, there are also potential costs and challenges associated with implementing and using this technology effectively. It is important to carefully consider your needs and resources before investing in a CRM application, and to work closely with technical experts to ensure that your system is properly configured and secured.

## **8 FUTURE SCOPE**

the future scope for CRM application to book a visa slot is exciting, with new technologies and trends poised to transform the way visa service providers operate and deliver value to their customers. By staying ahead of these emerging trends and embracing new technologies, visa service providers can differentiate themselves in a competitive market and provide a more seamless and satisfying visa application experience for their customers.