

04 PROJECT REPORT on

CRM Applicatoin that helps to book a visa slot

1. INTRODUCTION

1.1 Overview

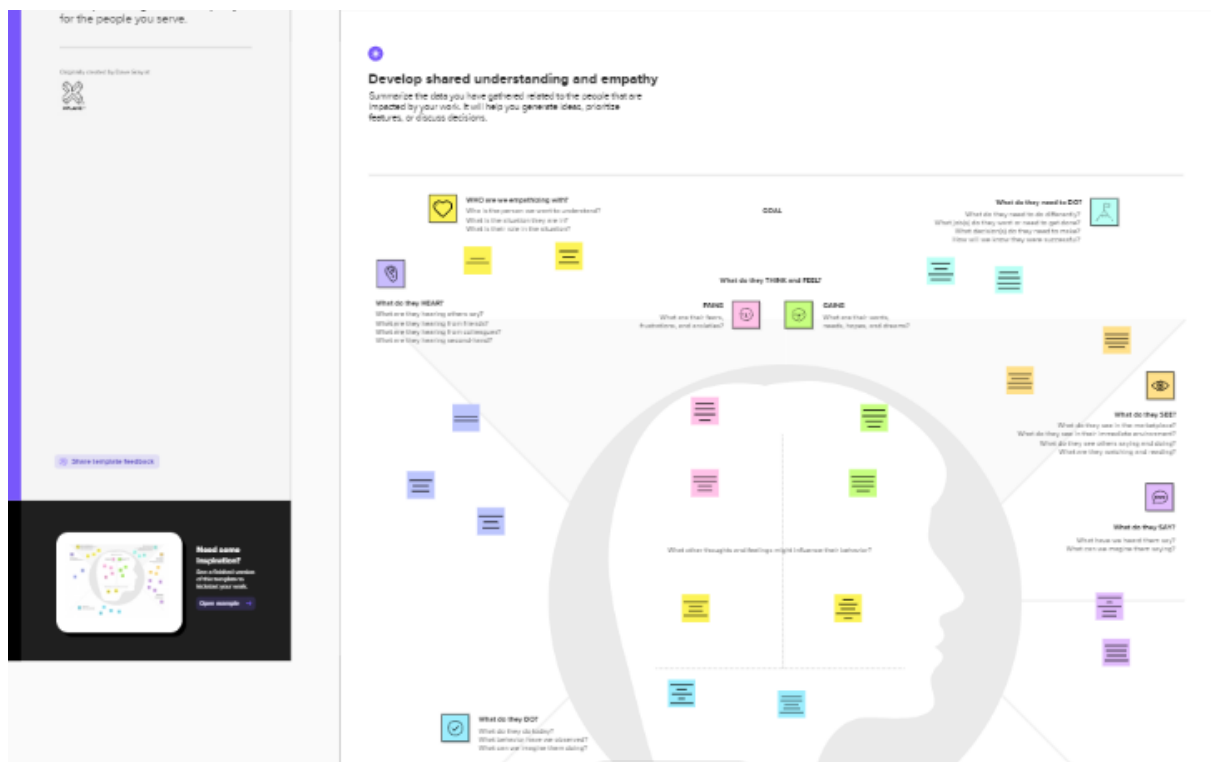
The CRM Application that helps to book a Visa slot using Salesforce is a system that automates the process of booking a visa appointment with the relevant embassy. The system provides an efficient and streamlined method for individuals and organizations to schedule and manage their visa appointments.

1.2 Purpose

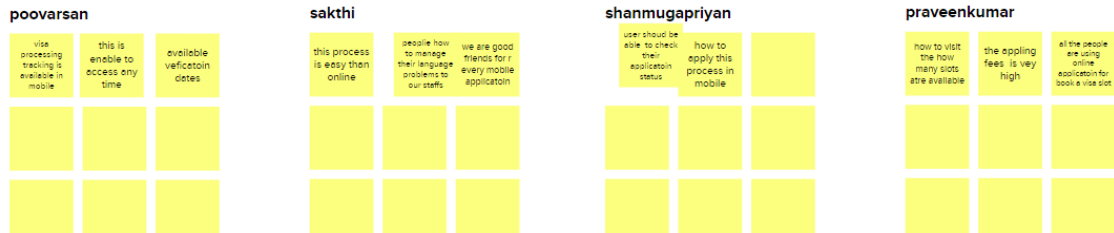
The primary purpose of this project is to develop a CRM system that enables individuals and organizations to schedule and manage visa appointments efficiently. The system will provide a centralized location for storing and managing visa-related information, enabling users to track their visa application progress.

2. PROBLEM DEFINITION & DESIGN THINKING

2.1 Empathy Map



2.2 Ideation & Brainstorming Map



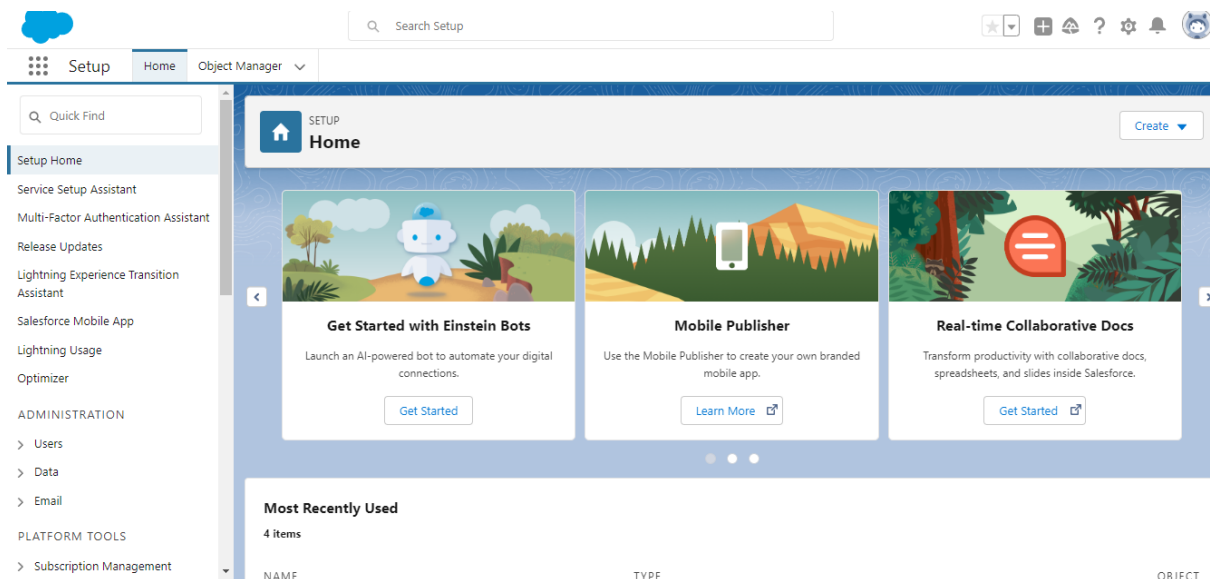
3. RESULT

3.1 Data Model:

| Object name | Fields in the Object | |
|------------------|----------------------|----------------------------|
| Standard objects | Field label | Data type |
| | passport | Text |
| | Passport number | Text |
| | | |
| Custom objects | Field label | Data type |
| | Passport | Number |
| | Passport&visa | Master detail relationship |
| | | |

3.2 Activity and Screenshot

MILESTONE-1



MILESTONE-2

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
Restriction Rules

Field Name: Number of digits to the left of the decimal point
 Description:
 Help Text: Number of digits to the right of the decimal point

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
 Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity

Default Value:
Use formula syntax: Enclose text and picklist value API names in double quotes: { "My_Field" }; 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__c.RecordAPIName.Field__c }

Previous Next Cancel

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SETUP > OBJECT MANAGER
visa slot

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules

Field Label:
 Field Name:
 Description:
 Help Text:

Child Relationship Name:
 Sharing Setting:
☐ Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.
☒ Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Allow reparenting: ☐ Child records can be reparented to other parent records after they are created
 Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity

Lookup Filter

MILESTONE-4

Q app

Salesforce Mobile App

▼ Data
Mass Transfer Approval Requests

▼ Apps
App Manager
AppExchange Marketplace

▼ Connected Apps
Connected Apps OAuth Usage
Manage Connected Apps

▼ Lightning Bolt
Flow Category
Lightning Bolt Solutions

▼ Mobile Apps
Salesforce

SETUP
Lightning Experience App Manager

New Lightning App New Connected App

Clone Apps(Beta)

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the [Winter '23 release notes](#)

Enable App Cloning ☐ Disabled

23 Items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

| | App Name ↑ | Developer Name | Description | Last Modified ... | Ap... | VI... |
|---|------------------|----------------|---|----------------------|-----------|-------|
| 1 | All Tabs | AllTabSet | | 15/03/2023, 12:45 pm | Classic | |
| 2 | Analytics Studio | Insights | Build CRM Analytics dashboards and apps | 15/03/2023, 12:45 pm | Classic | ✓ |
| 3 | App Launcher | AppLauncher | App Launcher tabs | 15/03/2023, 12:45 pm | Classic | ✓ |
| 4 | Bolt Solutions | LightningBolt | Discover and manage business solutions designed for your i... | 15/03/2023, 12:47 pm | Lightning | ✓ |

MILESTONE-5

Setup Home Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

User poovarasan k

Permission Set Assignments | Permission Set Assignments Activation Required | Permission Set Group Assignments | Permission Set License Assignments | Personal Groups | Public Group Membership | Queue Membership | Team | Managers in the Role Hierarchy | OAuth Connected Apps | Third-Party Account Links | Installed Mobile Apps | Authentication Settings for External Systems | Login History | User Provisioning Accounts

User Detail

Edit Sharing Reset Password Freeze

| | | | |
|------------|--|---------------------------|-------------------------------------|
| Name | poovarasan k | Role | Salesforce |
| Alias | pk | User License | Standard User |
| Email | poo158532@gmail.com | Profile | Standard User |
| Username | floweking@gmail.com | Active | <input checked="" type="checkbox"/> |
| Nickname | User168196709988343212 | Marketing User | <input type="checkbox"/> |
| Title | | Offline User | <input type="checkbox"/> |
| Company | | Knowledge User | <input type="checkbox"/> |
| Department | | Flow User | <input type="checkbox"/> |
| Division | | Service Cloud User | <input type="checkbox"/> |
| Address | | Site.com Contributor User | <input type="checkbox"/> |
| Time Zone | (GMT+05:30) India Standard Time (Asia/Kolkata) | Site.com Publisher User | <input type="checkbox"/> |
| Locale | English (India) | WDC User | <input type="checkbox"/> |

MILESTONE-5 b

Setup Sharing Settings

| Service resource | Public Read/Write | Private | |
|--------------------|-------------------|-------------------|-------------------------------------|
| Service Territory | Public Read/Write | Private | <input checked="" type="checkbox"/> |
| Shift | Private | Private | <input checked="" type="checkbox"/> |
| Streaming Channel | Public Read/Write | Private | <input checked="" type="checkbox"/> |
| Web Cart Document | Private | Private | <input checked="" type="checkbox"/> |
| Work Order | Private | Private | <input checked="" type="checkbox"/> |
| Work Plan | Private | Private | <input checked="" type="checkbox"/> |
| Work Plan Template | Private | Private | <input checked="" type="checkbox"/> |
| Work Step Template | Private | Private | <input checked="" type="checkbox"/> |
| Work Type | Private | Private | <input checked="" type="checkbox"/> |
| Work Type Group | Public Read/Write | Private | <input checked="" type="checkbox"/> |
| passport | Public Read/Write | Public Read/Write | <input checked="" type="checkbox"/> |

Other Settings

Standard Report Visibility ☒ Manual User Record Sharing ☐ Manager Groups ☐ Secure guest user record access ☒ Require permission to view record names in lookup fields ☐

Save Cancel

MILESTONE-6

4. TRAILHEAD PROFILE PUBLIC URL

Team Lead – <https://trailblazer.me/id/pflower16>

Team member 1 - <https://trailblazer.me/id/esakthi04>

Team member 2 - <https://trailblazer.me/id/t2bscphy>

Team member 3 - <https://trailblazer.me/id/pkumar4885>

5. ADVANTAGES AND DISADVANTAGES

Advantages:

Increased efficiency: The system will automate the visa appointment booking process, reducing the time and resources required for manual booking.

Customizable and flexible: The system can be customized to meet the specific needs of different users, providing a tailored solution to meet their visa application requirements.

Real-time updates: The system will provide real-time updates on the status of the visa application, enabling users to respond quickly to any updates or changes in the process.

Reduced errors: The system will reduce the risk of errors in the visa application process, providing a more accurate and efficient system.

Disadvantages:

Technical complexity: Implementing a CRM system requires technical expertise and ongoing maintenance, which can be a challenge for some users.

Cost: Developing and implementing a CRM system can be expensive, requiring resources for software development, hardware, and technical support.

User adoption: Some users may be resistant to using a new system, which could affect user adoption rates.

6. APPLICATIONS

The CRM application for booking a visa slot has applications for various users, including individuals, organizations, and travel agencies. The system can be used by users to schedule and manage their visa appointments, enabling them to track their visa application progress.

7. CONCLUSION

In conclusion, implementing a CRM system for booking a visa slot using Salesforce is an effective tool for individuals, organizations, and travel agencies to manage their visa application process. While there are potential drawbacks, such as cost and technical complexity, the advantages of the system, such as increased efficiency, customization, real-time updates, and reduced errors, outweigh the disadvantages. Overall, the CRM system is a valuable tool for users seeking to streamline and automate their visa application process.

8. FUTURE SCOPE

The future scope of this project is significant, with potential enhancements and features that could be added to the system, such as:

Integration with multiple embassies: The system could be developed to integrate with multiple embassies, allowing users to schedule visa appointments across different embassies.

Integration with travel agencies: The system could be developed to integrate with travel agencies, providing a holistic travel booking solution.

Machine learning capabilities: The system could be developed to include machine learning capabilities, such as predictive analytics, to provide insights on visa application trends.

Mobile application: A mobile application could be developed to complement the web-based system, providing users with on-the-go access to their visa application progress.

Integration with ePassport systems: The system could be enhanced to integrate with ePassport systems, providing a more secure and efficient visa application process.