

PROJECT REPORT TEMPLATE

CRM APPLICATION THAT HELPS TO BOOK A VISA SLOT

1. INTRODUCTION

1.1 OVERVIEW

(i) 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 application.

(ii) It might be used by a government agency or a visa processing center To schedule and manage appointments with applicants.

(iii) The concept of customer relationship management (CRM) aims to streamline the approach of organizations toward their customers.

(iv) It includes documentation of customer data so that it can be used for information analysis, evaluation, and future planning.

(v) For immigration consultants, it is very important to maintain proper records of potential clients as well as existing customers.

(vi) Investing in a CRM system is undoubtedly very fruitful not just for small & medium sized organizations but for large ones as well.

1.2 Purpose

(i) Customer relationship management (CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers.

(ii) The goal is simple. Improve business relationships.

(iii) A CRM system helps companies stay connected to customers, streamline processes, and improve profitability.

(iv) with a CRM solution, the sales and marketing team can track and follow a customer's interaction journey with your business.

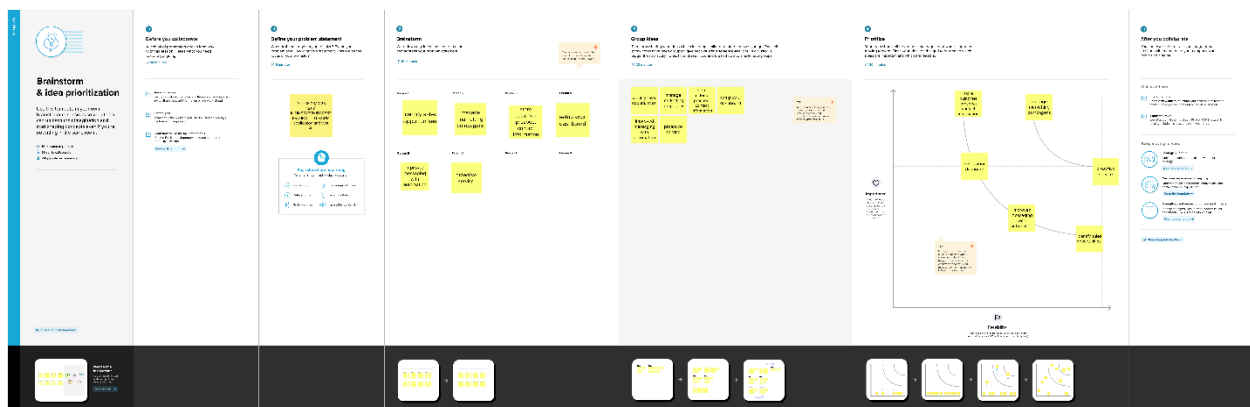
(v) This can enhance the customer journey and experience by refining each customer touchpoint.

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	
Passport	Field label	Data type
	Full name	Text
	Passport number	Text
	Contact number	Number
	Permanent address	Text
Visa slot	Field label	Data type
	location	Text
	time	Number
	Passport number	Text
	Visa slot number	Number
Payment	Field label	Data type
	Payment mode	Text
	Card number	Number
	Transaction id	Text
	Cancel transaction	Text
	Visa slot number	Number
Reschedule	Field label	Data type
	Passport number	Text
	Location	Text
	Time	Number
	cancel	Text
	Status	Text

3.2 Activity & Screenshot

Milestone 1:

Activity 1:

The screenshot shows the Salesforce Setup Home page. The left sidebar contains a 'Quick Find' search bar and a list of navigation items: Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION (with sub-items Users, Data, Email), PLATFORM TOOLS (with sub-items Subscription Management, Apps, Feature Settings, Slack), and a 'Create' button. The main content area has a 'SETUP Home' header with a 'Create' button. Below the header are three featured cards: 'Get Started with Einstein Bots' (Launch an AI-powered bot to automate your digital connections, Get Started), 'Mobile Publisher' (Use the Mobile Publisher to create your own branded mobile app, Learn More), and 'Real-time Collaborative Docs' (Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce, Get Started). At the bottom is a 'Most Recently Used' section with 8 items, displayed as a table.


NAME	TYPE	OBJECT
GAYATHRIDEVI A	User	

Milestone 2:








Activity 1:

This screenshot shows the same Salesforce Setup Home page as the first one, but with the 'Most Recently Used' table expanded to show all 8 items. The table lists various system objects and their types.

NAME	TYPE	OBJECT
GAYATHRIDEVI A	User	
System Administrator	Profile	
Passport	Custom Field Definition	visa
visa	Custom Object Definition	
GAYATHRIDEVI A	User	
Passport	Custom Object Definition	
Passport	Custom Field Definition	Passport
Passports	Custom Tab Definition	Passport



Search Setup



SetupHomeObject 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
In Development








Help Settings
Standard salesforce.com Help Window

EditDelete

Activity 2:



Search Setup



SetupHomeObject 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

Restriction Rules

Fields & Relationships

5 Items, Sorted by Field Label

Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Passport	Passport_c	Number(18, 0)		
Passport number	Name	Text(80)		✓

Milestone 3:

Activity 1:

Setup

Home

Object Manager

Search Setup

Star

Share

Help

Settings

Notifications

Profile

SETUP > OBJECT MANAGER

visa

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

Scoping Rules

Fields & Relationships

4 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
visa Number	Name	Text(80)		✓
Passport	Passport__c	Master-Detail(Passport)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Created By	CreatedById	Lookup(User)		

Milestone 4:

Activity 1

Setup

Home

Object Manager

Search Setup

Star

Share

Help

Settings

Notifications

Profile

Q app

Salesforce Mobile App

Data

Apps

App Manager

AppExchange Marketplace

Connected Apps

Manage Connected Apps

Lightning Bolt

Flow Category

Lightning Bolt Solutions

Mobile Apps

Salesforce

Salesforce Branding

Salesforce Navigation

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

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

	App Name	Developer Name	Description	Last Modified D...	App ...	Visi...
1	All Tabs	AllTabSet		14/03/2023, 4:03 pm	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	14/03/2023, 4:03 pm	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	14/03/2023, 4:03 pm	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	14/03/2023, 4:05 pm	Lightning	✓
5	book my visa	book_my_visa		30/03/2023, 2:44 pm	Lightning	✓
6	Community	Community	Salesforce CRM Communities	14/03/2023, 4:03 pm	Classic	✓
7	Content	Content	Salesforce CRM Content	14/03/2023, 4:03 pm	Classic	✓

Activity 2:

Setup

Home

Object Manager

Q Search Setup

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⚙

🔔

👤

Q shar

Security

Sharing Settings

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

SETUP

Sharing Settings

Help for this Page

Sharing Settings

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

Organization-Wide Defaults Help

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	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓
Calendar	Hide Details and Add Events	Hide Details and Add Events	✓
Price Book	Use	Use	✓
Product	Public Read/Write	Public Read/Write	✓

Milestone 6:

Activity1:

Search...

Sales

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Chatter

Groups

More

REPORT

New passports with visa slots Report

passports with visa slots

↺

↻

Add Chart

Save & Run

Save

Close

Run

Outline

Filters

To see the latest edits, refresh the preview. Refresh

Update Preview Automatically

Fields

Groups

GROUP ROWS

Add group...

location

GROUP COLUMNS

Add group...

passport: passport Number

Columns

Add column...

visa slot: visa slot Name

passport: passport Number

visa slot: visa slot Name

No records returned. Try editing report filters:

Show All passports.

Edit other filters in the filter panel.

Row Counts

Detail Rows

Grand Total

Stacked Summaries

Conditional Formatting

Milestone 7:

Activity:

The screenshot displays the Salesforce Reports page. The top navigation bar includes a search bar and various icons. The left sidebar shows the 'Reports' section with a 'Recent' filter selected. The main content area shows a table with one report item:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Passports with visas Report		Private Reports	GAYATHRIDEVI A	30/3/2023, 3:40 pm	

The left sidebar also lists other filters: Created by Me, Private Reports, Public Reports, All Reports, FOLDERS, All Folders, Created by Me, Shared with Me, FAVORITES, and All Favorites.

4. Trailhead profile public URL

Team lead: Gayathridevi .A

<https://trailblazer.me/id/ggayathri39>

Team member 1: Kannan.E

<https://trailblazer.me/id/kanne24>

Team member 2: Gunal.K

<https://trailblazer.me/id/gkumar1009>

Team member 3: Gowri.B

<https://trailblazer.me/id/ggowri10>

Team member 4: Gayathri.K

<https://trailblazer.me/id/gkannayiram1>

5. Advantages & Disadvantages

Advantages:

- (i) Improved informational organizations.
- (ii) CRM for enhanced communication.
- (iii) CRM improves your customer service.
- (iv) Automation of every tasks.
- (v) Greater efficiency for multiple terms.
- (vi) Improved analytical data and reporting.

Disadvantages:

- (i) CRM costs. one of the greatest challenges to CRM implementation is cost.
- (ii) Business culture. A lack of commitments or resistance to cultural change from people within the company can cause major difficulties with CRM implementation.
- (iii) Poor communication.
- (iv) Lack of leadership.

6. Applications

(i) As customers have various products or services to choose from, it becomes challenging for businesses to position themselves in the market.

(ii) As a result, customers make their purchase decisions based on their experience with the business.

(iii) Hence, it becomes necessary for a company to offer an excellent customer experience (CX). For that, businesses require complete knowledge of customer data.

(iv) CRM systems collect necessary data from several sources such as email, websites, marketing campaigns, advertising campaigns, and physical stores.

(v) All these data are placed together to develop CRM solutions and enhance the customer experience.

7. Conclusion

(i) The term Customer Relationship Management (CRM) describes systems and processes within companies which, with the help of customer data, aim to unify and improve customer service in order to achieve higher levels of customer loyalty.

(ii) Customer Relationship Management brings together various departments, such as sales and marketing, to ensure a uniform approach which ultimately contributes to increasing the company's success.

(iii) Unlike many other corporate guidelines, CRM focuses on the customer and customer relationships rather than on sales or profits.

(iv) This approach is particularly widespread in the business-to-business (B2B) area where it is often very difficult for companies to attract new customers.

(v) Although online marketing has made things much easier and opened up new solutions, business-to-business still remains a sector where it is difficult, and above all expensive, for any company to acquire fresh customers.

(vi) Customer relationship management is also used in the business-to-consumer area, though it plays a somewhat different role here because CRM for business customers is usually based on processes and solutions that are specifically tailored to individual customers.

8.Future scope

(i) CRM is predicted to become more powerful to support customer first, not company first businesses.

(ii) Bringing together disparate teams, data, and system integrations, the CRM of the future is set to be centralized and empowered by AI and mobile capabilities.

(iii) Defining the scope of CRM projects means figuring out which areas of your business need to be included in the CRM implementation plan.

(iv) Before any CRM initiative begins, scoping is essential to establish what the effort will and will not cover, as well as to prevent feature creep and project bloating.