PHASE 1 — PROJECT PROPOSAL & REQUIREMENTS

Project Name: *Smart Visitor Management CRM System*

Platform: Salesforce Lightning

Domain: Security + CRM Automation

1. Introduction

The Smart Visitor Management CRM is a Salesforce-based system designed to automate and streamline the process of managing visitors in an organization. It improves security, reduces manual effort, and provides real-time tracking of visitor movements.

2. Objective

- To automate visitor registration and entry approval.
- To generate digital/QR visitor passes.
- To send automated notifications to the host.
- To track check-in & check-out times.
- To maintain a secure digital log of all visitor activity.
- To restrict blacklisted or unauthorized visitors.

3. Problem Statement

Traditional visitor management in institutions and companies is usually manual and involves paper-based registers, which creates issues like:

- Inaccurate visitor records
- No real-time monitoring
- Security vulnerabilities
- Delayed host communication
- Difficulty finding past visitor logs

To solve these problems, an automated CRM solution on Salesforce is designed.

4. Proposed Solution

A centralized Salesforce CRM app that provides:

- Visitor registration
- Automatic QR code pass generation
- Host notification through email
- Real-time visitor entry tracking
- Visitor blacklist validation
- Reporting & dashboards for security teams

This ensures a secure, digital, and automated visitor tracking system.

5. Scope of the Project

Included in Scope:

✔ Visitor data capture
✔ Host management

✔ QR pass generation

✔ Entry & exit logs

✔ Blacklist management

✔ Flow automation

✔ Validation rules

✔ Reports and dashboards

6. Visitor Object & Fields

Field Label	API Name	Data Type	Description
Visitor Name	Name	Text(80)	Name of the visitor
Purpose of Visit	Purpose_of_Visit__c	Text Area(255)	Reason for the visit
Phone Number	Phone_Number__c	Phone	Contact number of visitor
Email	Email__c	Email	Visitor email address
ID Proof Type	ID_Proof_Type__c	Picklist	Type of ID provided
ID Proof Number	ID_Proof_Number__c	Text(20)	ID number of visitor
Check-In Time	Check_In_Time__c	Date/Time	Auto-filled by Flow
Check-Out Time	Check_Out_Time__c	Date/Time	Check-Out time of visitor
Host	Host__c	Lookup(User)	Employee the visitor meets
Record Type	RecordTypeId	Record Type	Walk-In, Scheduled, VIP