

**2.1 Project Goal** A CRM (Customer Relationship Management) application integrated into Salesforce, specifically designed to facilitate the booking of visa slots, can greatly streamline the operations of travel and visa processing companies. The primary goal of a CRM application designed to help book visa slots is to enhance the efficiency and effectiveness of the visa application process. Simplify and expedite the visa slot booking process for applicants, making it easy for them to select suitable time slots based on their preferences. Provide real-time information on slot availability across various consulates and embassies, ensuring applicants have up-to-date access to available appointments.

## **2.2 Project Scope**

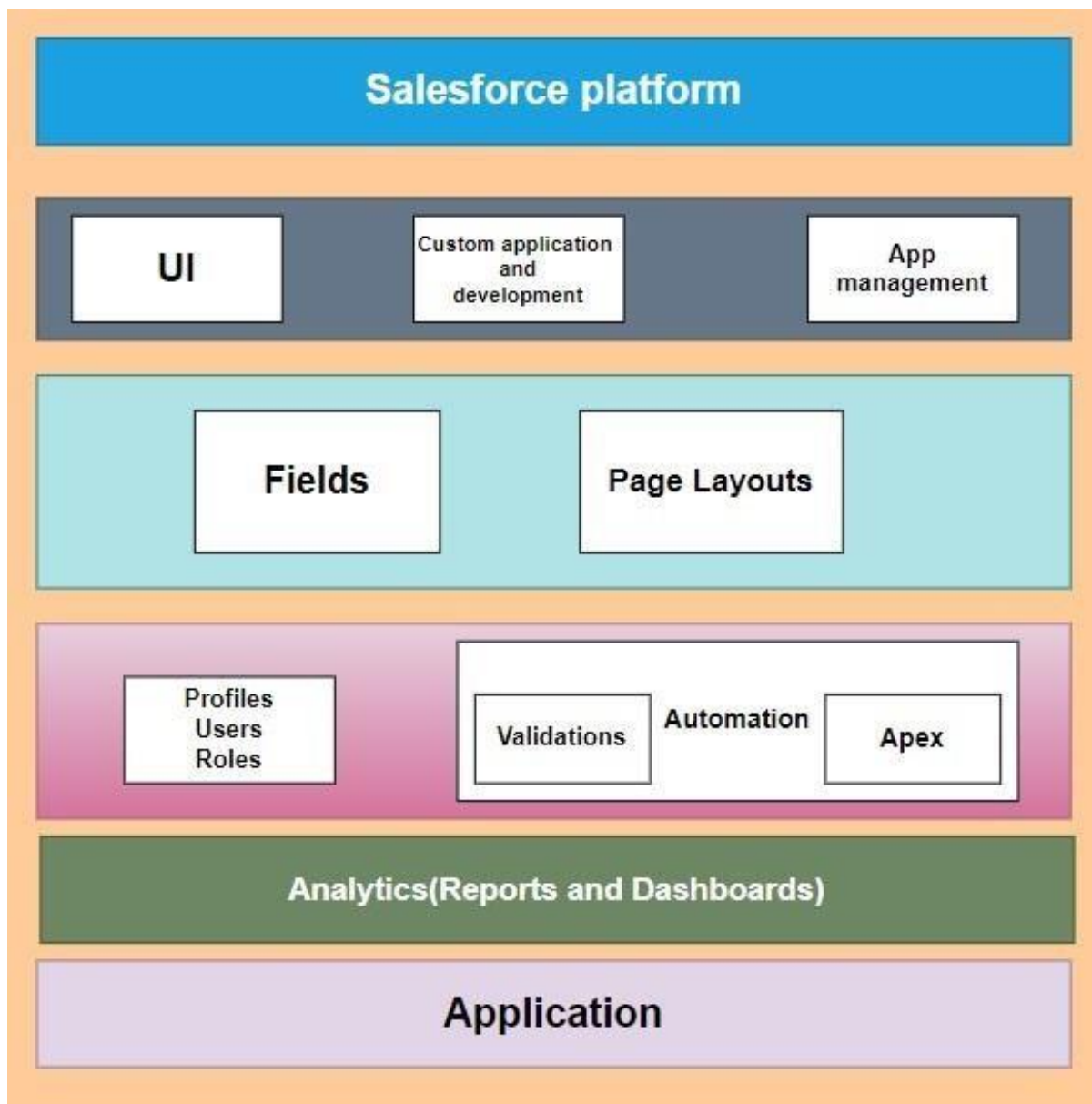
- **Creation of Developer Account (Milestone 1):** To create a developer account for the Visa Slot Booking CRM application, visit the platform's website, select "Developer Account," and follow the registration process by providing essential information.
- **Object Creation (Milestone 2):** In the CRM application, object creation involves defining data structures for key elements like "Visa Applications" or "Appointments" to organize and manage essential booking and application information.
- **Tabs Creation (Milestone 3):** Tabs in the CRM application offer quick access to essential features, such as "Appointments," "Payments," and "Support," streamlining navigation for efficient visa slot booking and management.
- **Relationship Between Objects (Milestone 4):** Relations between objects in the CRM application link data, enabling connections like "Visa Applications" to

"Applicants," ensuring seamless tracking of applicants' visa-related information and interactions

- **Field Creation (Milestone 5):** Field creation in the CRM application involves defining data attributes like "Appointment Date" or "Payment Status" to store and manage crucial information for visa slot booking and processing.
- **Apps (Milestone 6):** In the CRM application, "APPS" refers to the software's mobile applications, allowing users to access and manage visa slot booking and related tasks on their mobile devices for convenience..
- **Users (Milestone 7):** In the CRM application, a "User" refers to individuals who interact with the system, including applicants booking visa slots and administrative staff managing the process..
- **User Adoption (Milestone 8):** "User adoption" in the CRM application refers to the degree to which individuals successfully integrate and regularly use the system for booking visa slots, indicating its effectiveness..
- **What are Reports? (Milestone 9):** Reports are data summaries in the CRM application, presenting key insights into visa slot booking processes, helping administrators analyze trends and performance.
- **Dashboards (Milestone 10):** Dashboards in the CRM application are visual data displays, providing at-a-glance insights on visa slot booking metrics, enhancing decisionmaking and operational efficiency.
- In summary, the CRM application for visa slot booking streamlines the entire process. It efficiently manages user data, from the creation of objects and fields to the use of tabs for navigation. The relationship between objects ensures seamless tracking, while reports and dashboards

offer essential insights. User adoption and mobile apps enhance accessibility, making this CRM system a comprehensive solution for efficient and user-friendly visa slot booking and management.

## **2.3 Technical Requirements**



## 2.4 Functional Requirements

- **User Registration:** Users can create accounts with personal information for access to visa slot booking.
- **Login and Authentication:** Secure login mechanisms with password protection and multi-factor authentication.
- **Real-Time Slot Availability:** Constantly updated slot availability information from consulates and embassies.

- **Booking Slots:** Users can select and reserve visa appointment slots based on preferences.
- **Automated Notifications:** Automated email and SMS notifications for appointment confirmations, reminders, and updates.
- **Document Upload:** Capability to upload, view, and manage visa application documents.
- **Payment Integration:** Integration with secure payment gateways for online payment of visa fees.
- **User Profile Management:** Users can update and maintain their profiles with ease.
- **Slot Cancellation and Rescheduling:** Users can cancel and reschedule appointments as needed.
- **Reporting and Analytics:** Creation of comprehensive reports and data analytics for performance evaluation.
- **Admin Dashboard:** An admin panel to manage users, appointments, and system settings.
- **Integrated Support Chat:** A live chat system for real-time user assistance and issue resolution.
- **Data Security Measures:** Implementation of robust data encryption and security features.

- **Compliance with Data Protection Regulations:** Ensuring adherence to data privacy laws and regulations.
- **Efficient Slot Allocation:** Allocation of slots without overbooking or underutilizing consulate resources.
- **User Feedback Gathering:** Collection of user feedback and reviews for continuous improvement.
- **Multi-Language Support:** Support for multiple languages to cater to a diverse user base.
- **Support Ticket System:** A ticketing system for users to log and track support requests.
- **Payment Status Tracking:** Users can track the status of their payment for visa application fees.
- **User Training Materials:** Availability of training materials and user guides for effective usage.
- **Customizable Data Fields:** The ability to customize and add data fields to capture specific information.
- **Audit Trail Logging:** A record of all actions and changes for transparency and accountability.
- **User Notifications:** Email or SMS notifications to keep users informed about visa application status.