

## Project Report

### CRM application that helps to book a Visa Slot

#### 1 INTRODUCTION:

##### 1.1 Overview:

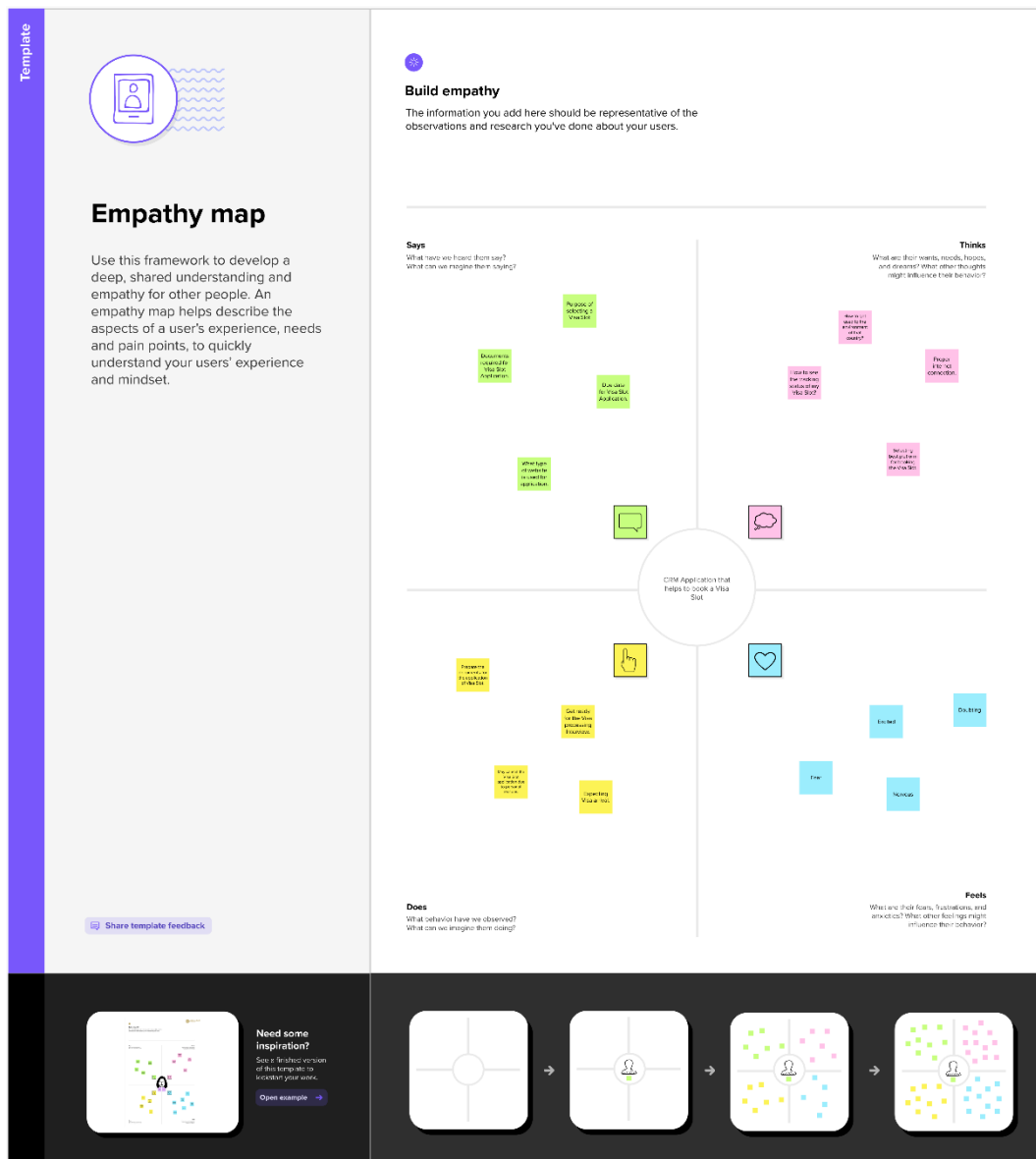
A CRM application that helps to book a Visa Slot specifically refers to a tool that streamlines the Visa application process by automating the booking of Visa appointment slots. This type of CRM application is specifically used by Visa application centers or embassies to manage the flow of Visa applications and appointments.

##### 1.2 Purpose:

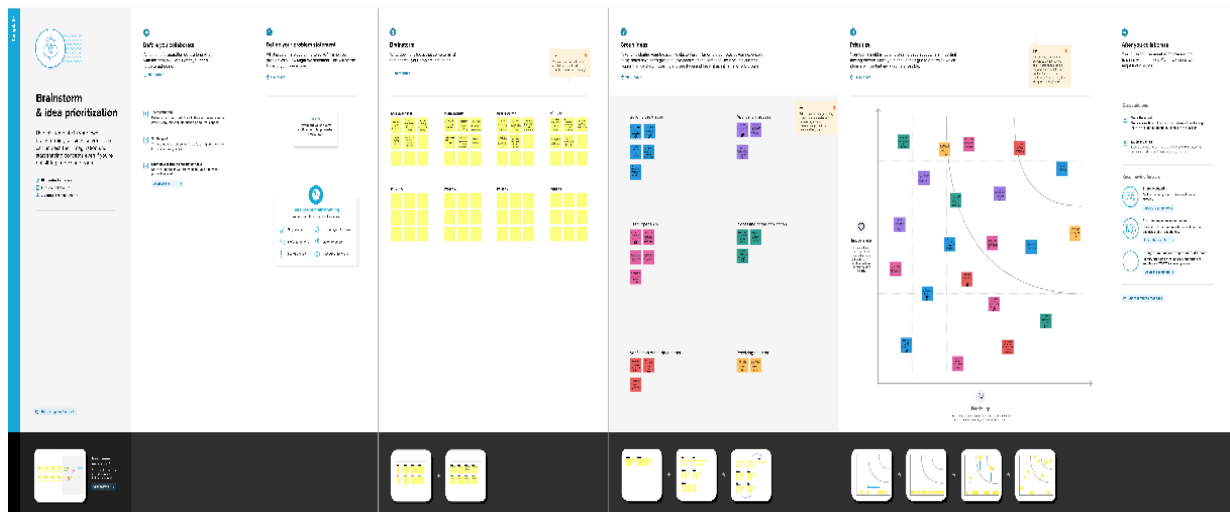
This allows the user to view available appointment slots in real-time and select the most convenient one. It also enables users to manage visa application documents, track the status of Visa application and send automated reminders to applicants regarding their appointments. By automating the Visa appointment booking process, this type of CRM application can help to reduce wait times and improve the overall Visa application experience for the applicants.

## 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(20)
	Passport Number	Text(80)
	Passport Name	Text(80)
	Contact Number	Number(10,0)
	Permanent address	Text(40)
Visa Slot	Field label	Data type
	Visa Slot Name	Text(80)
	Visa Slot Number	Text(80)
	Passport Number (Master)	Number(18,0) (External ID)
	Passport	Master-Detail(Passport)
	Location	Text(10) (External ID)

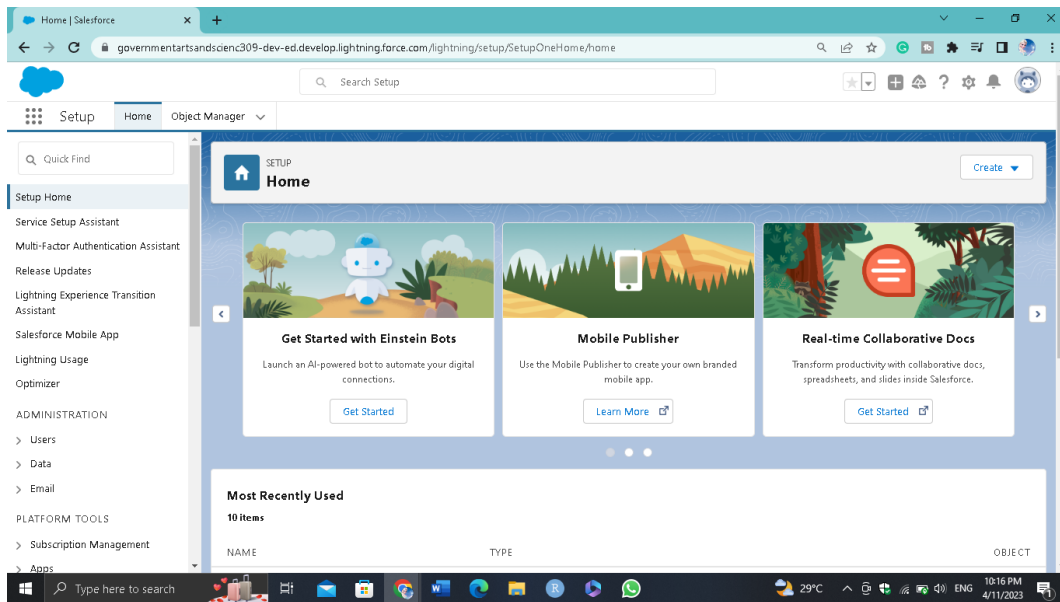
	Time	Text(10) (External ID)
Payment		
	Field label	Data type
	Payment Mode	Text(10)
	Payment Name	Text(80)
	Visa Slot Number (Master)	Text(10) (External ID)
	Card Number	Text(10) (External ID)
	Transaction Id (Auto Number)	Number(18,0) (External ID)
	Cancel Transaction	Text(10) (External ID)
Reschedule/Cancel		
	Field label	Data type
	Passport Number (Master)	Text(10) (External ID)
	Location	Text(10) (External ID)
	Time	Number(18,0) (External ID)
	Cancel	Text(10) (External ID)
	Status	Date/Time

#### 4 Activity & Screenshot:

**Milestone-1 : Creation of developer org:**

**Activity 1:**

**Creating Developer Account:**

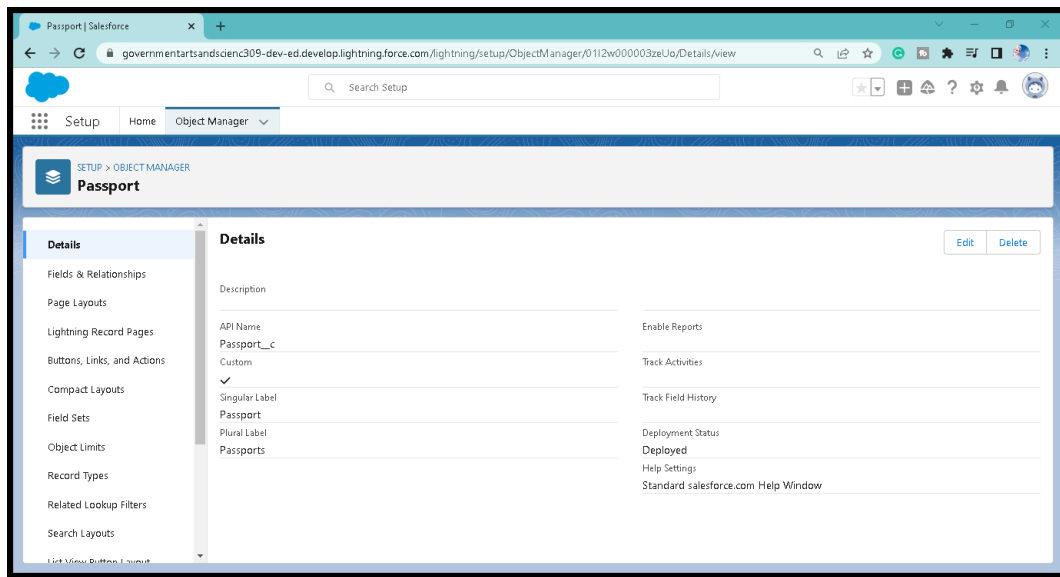


*Created a **Salesforce Account**.*

## **Milestone-2: Objects:**

### **Activity-1:**

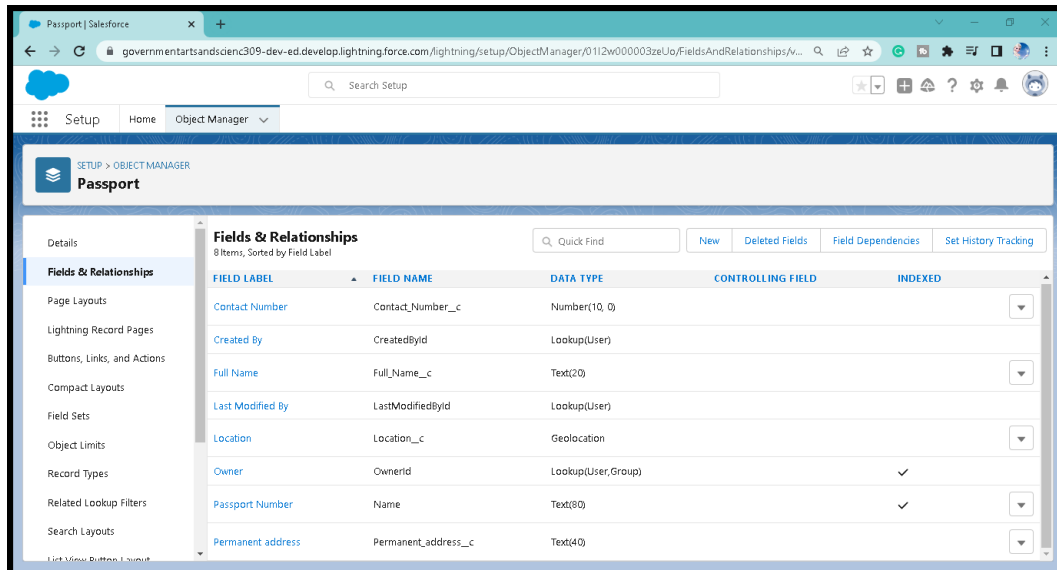
### **Creation of custom object: Passport:**



*Created a Custom Object **Passport** through Object Manager.*

## Activity-2:

### Creation of fields on custom Object: Passport:



The screenshot shows the Salesforce Setup interface for the 'Passport' custom object. The 'Fields & Relationships' section is active, displaying a list of 8 fields. The fields are: Contact Number, Created By, Full Name, Last Modified By, Location, Owner, Passport Number, and Permanent address. The 'Passport Number' field is highlighted as the controlling field and is indexed.

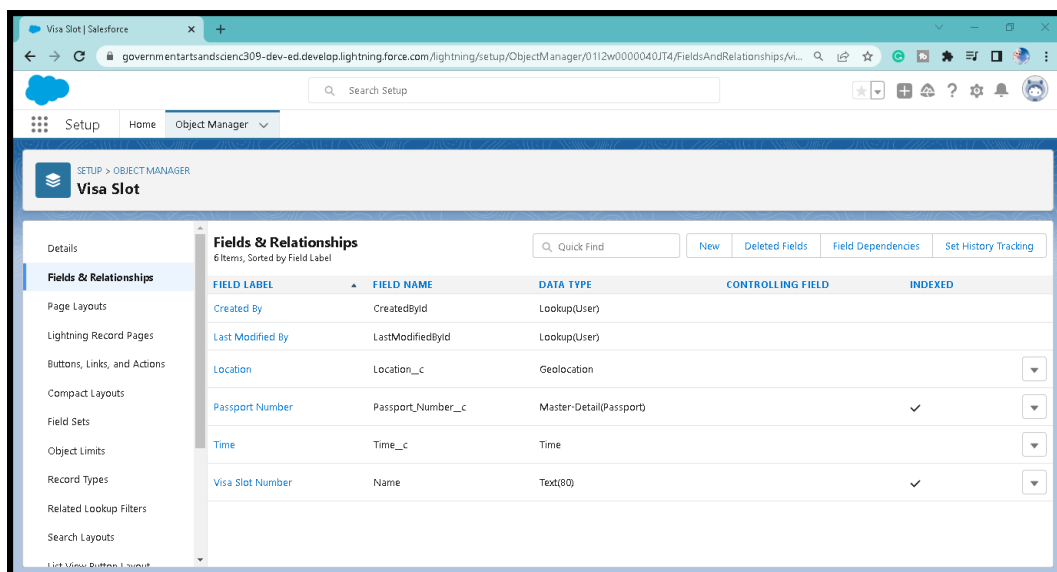
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Contact Number	Contact_Number__c	Number(10, 0)		
Created By	CreatedById	Lookup(User)		
Full Name	Full_Name__c	Text(20)		
Last Modified By	LastModifiedById	Lookup(User)		
Location	Location__c	Geolocation		
Owner	OwnerId	Lookup(User, Group)		✓
Passport Number	Name	Text(80)		✓
Permanent address	Permanent_address__c	Text(40)		

Created the necessary fields such as **Contact number**, **full name**, **Passport number**, **Permanent Address** for the Custom Object: **Passport**.

## Milestone-3: Relationship B/w Objects:

### Activity-1:

### Creation of Relationship:



The screenshot shows the Salesforce Setup interface for the 'Visa Slot' custom object. The 'Fields & Relationships' section is active, displaying a list of 6 fields. The fields are: Created By, Last Modified By, Location, Passport Number, Time, and Visa Slot Number. The 'Passport Number' field is highlighted as the controlling field and is indexed, indicating a master-detail relationship with the Passport object.

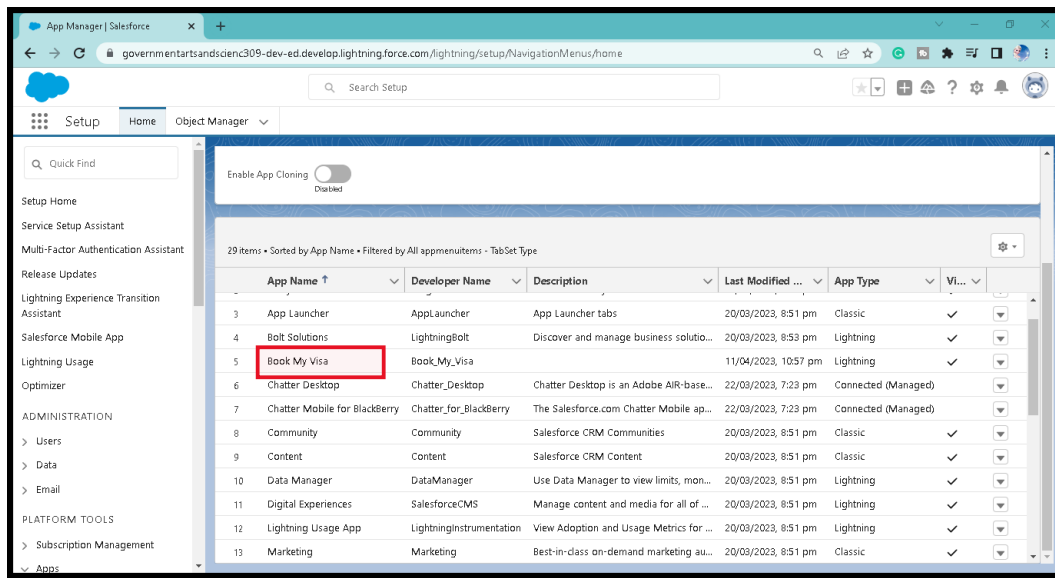
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Location	Location__c	Geolocation		
Passport Number	Passport_Number__c	Master-Detail(Passport)		✓
Time	Time__c	Time		
Visa Slot Number	Name	Text(80)		✓

Created a **Master Relationship** between **Passport** and **Visa Slot**.

## Milestone-4 App:

### Activity:

### Creation of App:

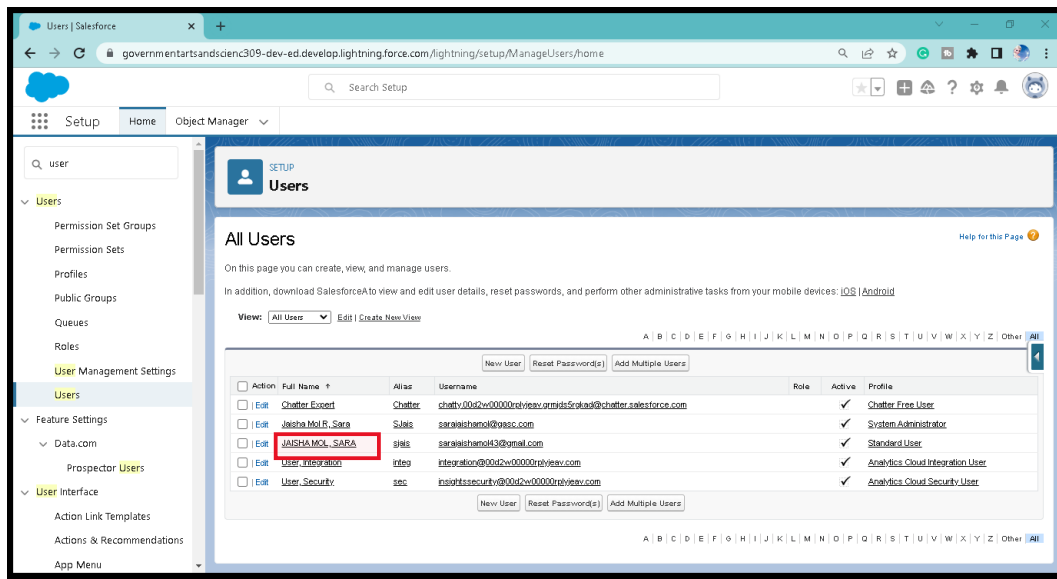


Created a Lightning App called **Book My Visa**.

**Milestone-5 User:**

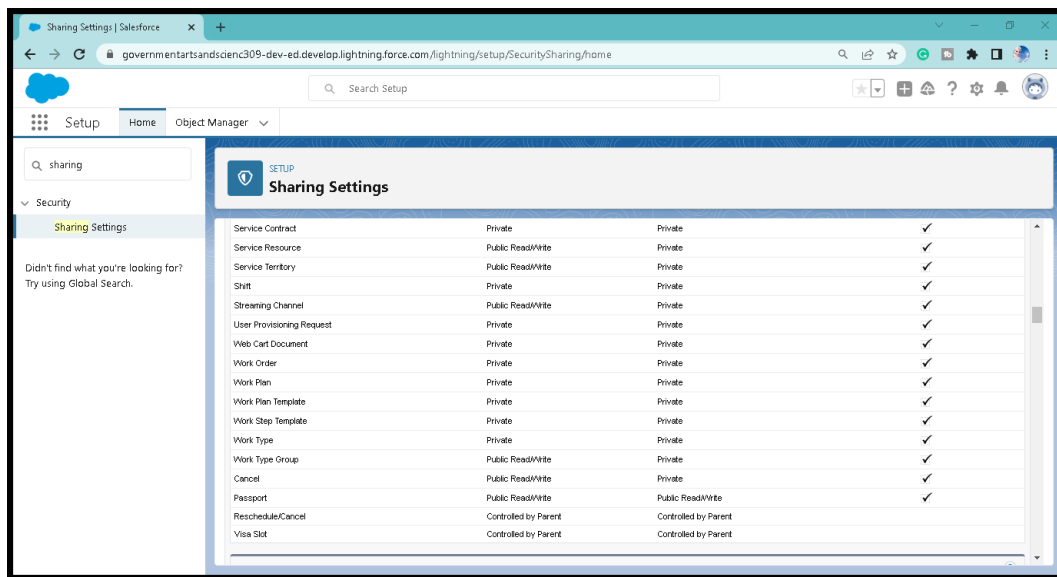
### Activity-1:

### Creation of User:



Created a new Standard User with the name **SARA JAISHA MOL.**

### Activity-2:



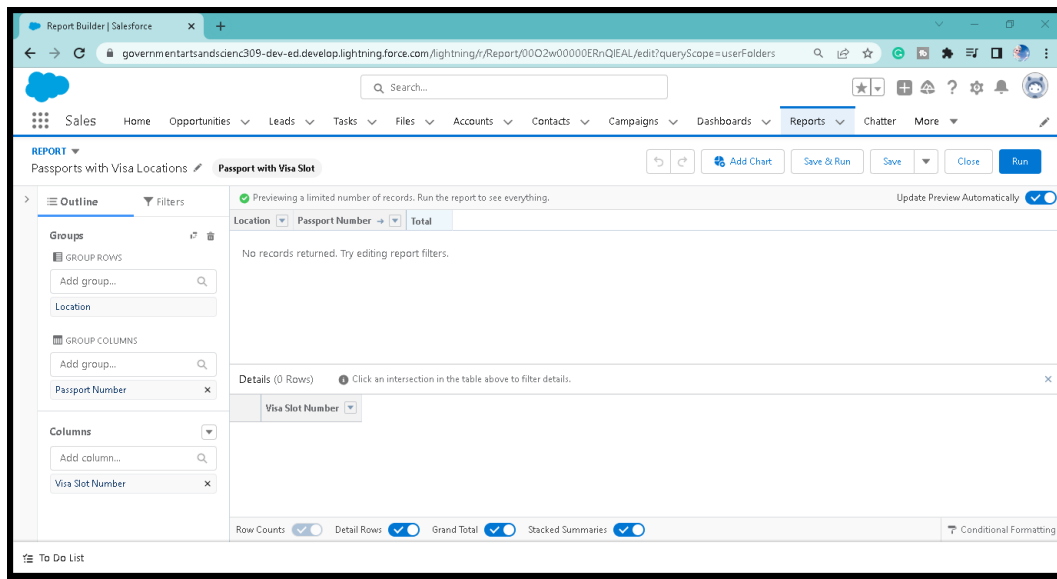
In the **Organization Wide Defaults** section of the Sharing Settings, the Default External Access is changed to **Public/Read/Write**.

**Milestone-6 Reports:**

### Activity-1:



## Creation of report:

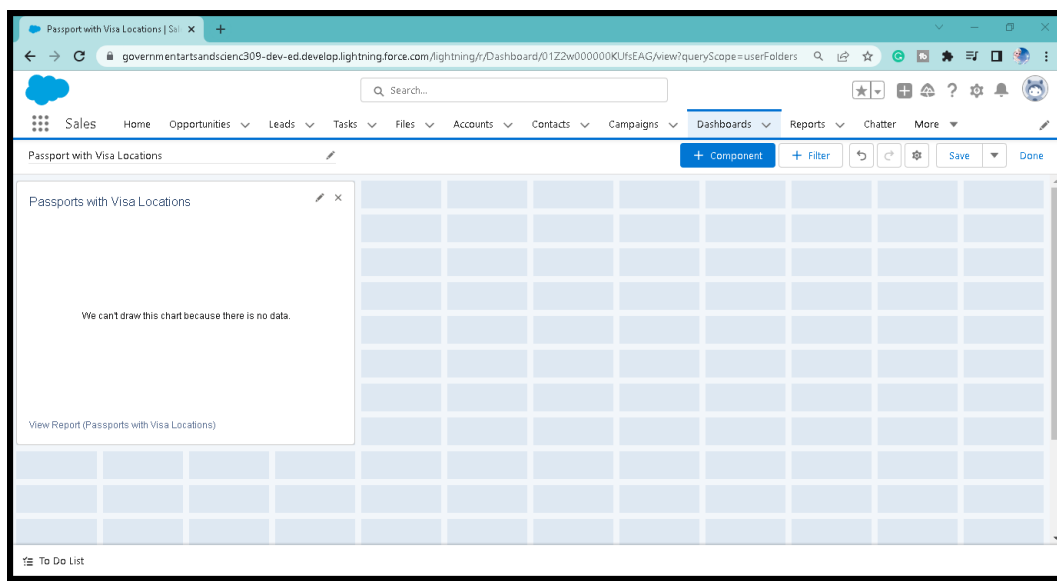


Created a report with a label name **Passports with visa locations**.

## Milestone-7 Dashboards:

### Activity:

### Creation of Dashboard:



Created a new dashboard which is named as **Passport with Visa Location**. The components added to this dashboard is the report that is created in the previous step "**Passports with visa location**".

## 5 Trailhead Profile Public URL

Team Lead - <https://trailblazer.me/id/sjaishamolr>

Team Member 1 - <https://trailblazer.me/id/mlakshmis4>

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

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



## 6 ADVANTAGES & DISADVANTAGE:

### **Advantages:**

1. Streamlined visa application process: The CRM application can automate the booking of visa appointment slots, making it easier and faster for applicants to secure an appointment.
2. Improved customer experience: By reducing wait times and providing automated reminders, the CRM application can improve the overall visa application experience for applicants.
3. Increased efficiency: The CRM application can help to reduce administrative burdens for visa application centers and embassies, freeing up staff time to focus on other tasks.
4. Real-time visibility: The CRM application can provide real-time visibility into available appointment slots, making it easier for visa application centers and embassies to manage the flow of applications.

### **Disadvantages:**

1. Technical issues: If the CRM application experiences technical issues or downtime, it could disrupt the visa application process and potentially cause delays for applicants.
2. User adoption: If the CRM application is difficult to use or requires significant training, it could be challenging to get users to adopt it.
3. Security concerns: As a tool that manages sensitive information such as passport and visa details, the CRM application needs to have robust security measures in place to protect this information from unauthorized access or data breaches.
4. Cost: Developing and implementing a CRM application can be expensive, particularly if it requires custom development or integration with existing systems.
5. Overall, a CRM application that helps to book a Visa slot can provide significant benefits for both visa application centers/embassies and applicants, but it's important to carefully weigh the potential advantages and disadvantages before undertaking such a project.

## **7 APPLICATIONS:**

A CRM application that helps to build a Visa slot can be applied in various areas such as:

1. **Visa Application Centers:** Visa application centers can use this CRM application to manage the flow of visa applications and appointments, making it easier for applicants to book an appointment and reducing wait times.
2. **Embassies:** Embassies can use the CRM application to manage the visa application process, including scheduling appointments and tracking the status of visa applications.
3. **Consulates:** Consulates can use the CRM application to manage visa applications and appointments for their respective countries.
4. **Travel and visa agencies:** Travel and visa agencies can use the CRM application to provide their clients with visa application services, such as booking appointments and tracking visa application status.
5. **Border control authorities:** Border control authorities can use the CRM application to track visa application status and verify visa information at the point of entry.

## **8 CONCLUSION:**

In conclusion, a CRM application that helps to book a Visa slot can be a useful tool for streamlining the visa application process, reducing wait times, improving the customer experience, and increasing efficiency for visa application centers and embassies. However, it is important to carefully consider the potential advantages and disadvantages of such a project before undertaking it.

To ensure the success of a CRM application that helps to book a Visa slot, it is important to consider factors such as user adoption, security, and cost. The application should be easy to use, have robust security measures in place, and be cost-effective to develop and implement.

Overall, a well-designed and well-implemented CRM application that helps to book a Visa slot can provide significant benefits for both visa application centers/embassies and applicants, making the visa application process faster, more convenient, and more efficient.

## **9 FUTURE SCOPE:**

1. The CRM application can be integrated with other systems, such as travel booking platforms or visa application tracking systems, to provide a more seamless experience for applicants and streamline the visa application process.
2. Develop a mobile app version so that it can help applicants book an appointment and access information easily.

And more enhancements that can help to improve the functionality, usability and efficiency of this CRM application that helps to book a Visa slot.