



Smart Internz

SMARTINTERNZ

GUIDED PROJECT

Customer Relationship Management (CRM)
Application That Helps To Book A Visa Slot

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1. INTRODUCTION:

1.1 Overview A brief description about your project:

An innovative method for streamlining and simplifying the scheduling of Visa appointments is the Customer Relationship Management (CRM) application for booking Visa slots. This programme, which is based on a strong CRM platform, has a user-friendly interface that makes it easy to reserve Visa slots. By utilising technology to improve all aspects of the Visa application process, it benefits both applicants and the businesses involved.

The need for Visa services has increased as a result of rising globalisation and personal mobility. However, the conventional techniques for scheduling Visa appointments can include difficult procedures, time-consuming manual paperwork, and lengthy waits. By automating and improving the Visa slot reservation process, our CRM solution seeks to address these issues by making it more practical, effective, and user-friendly.

This CRM application's main goal is to provide people and organisations looking to book Visa appointments with a seamless and streamlined experience. The programme streamlines the procedure by utilising CRM technology's capabilities, minimising human work and getting rid of the difficulties frequently connected to conventional booking techniques.

Candidates have access to a central platform through this CRM application where they can quickly look for open Visa slots according on their preferences. By offering real-time updates on slot availability, the programme makes sure users always have the most recent information at their fingertips. The necessity for time-consuming documentation or manual coordination with Visa authorities is removed when applicants can reserve a suitable appointment straight through the application.

Additionally, the CRM programme provides extra capabilities to improve the entire experience. Applicants can receive personalised notifications and reminders about their forthcoming appointments, helping them to be prepared and organised. The programme also makes it possible to maintain and save applicant data securely, making it possible to easily access that data in the future for reporting or reference needs.

Both applicants and the organisations engaged in the Visa application process can gain a lot from using this CRM solution. By effectively reserving Visa slots, applicants can save time and effort and lessen the stress connected with the application procedure. Organisations, like Visa authorities or consulates, can improve client satisfaction and their overall service delivery by streamlining their internal processes.

1.2 Purpose The use of this project. What can be achieved using this.

The purpose of this project is to enhance the VISA application process by automating the slot booking procedure through a CRM application built on the Salesforce platform. By using this application, users will be able to easily schedule their VISA appointments, saving time and reducing the complexity associated with the traditional manual booking methods.

This application will offer numerous advantages, such as:

Efficiency: The CRM application automates the slot booking process, saving applicants valuable time and effort.

Real-time Updates: The application integrates with the VISA appointment scheduling system, ensuring real-time updates on slot availability. This feature eliminates discrepancies.

Data Management: The Salesforce CRM platform provides robust data management capabilities, allowing for secure storage and easy retrieval of applicant information. Organizations can utilize this data for analytics, process improvements, and regulatory compliance.

Cost-effectiveness: By streamlining the booking process, the application helps organizations save valuable resources, both in terms of time and personnel.

2. LITERATURE SURVEY:

2.1 Existing problem Existing approaches or method to solve this problem:

The current issue with the Visa slot booking procedure is that it is frequently intricate, drawn-out, and ineffective. The manual procedures required by the conventional ways of scheduling Visa slots, such as visiting embassy websites or getting in touch with consulates, can be difficult and irritating for applicants. The following are some of the main problems with the current procedure:

1. **Manual Search:** To check for open Visa slots, applicants must manually search through numerous websites or get in touch with various consulates. This procedure may take a long time and be prone to mistakes.
2. **Limited Slot Availability:** The current systems frequently have few spaces open, particularly during busy travel times.
3. **Lack of Transparency:** Since the information may not be current or easily accessible, applicants may encounter a lack of transparency regarding slot availability. As a result, it may be difficult for applicants to adequately prepare their travel plans due to confusion and uncertainty.
4. **Manual Coordination:** Manual communication techniques, such as phone calls or emails, are used to coordinate with consulates or embassies for slot booking. This

might cause misunderstandings and long response times, further complicating the procedure.

Existing Approaches:

1. Online appointment systems have been adopted by many nations and consulates, allowing applicants to reserve Visa slots using specialised web portals. Users of these systems can check the availability of slots in real-time, choose the times and dates that work best for them, and make online reservations. Online appointment methods simplify the procedure, minimise manual labour, and give applicants transparency.
2. Queue management systems have been put in place at some consulates and Visa processing facilities. These systems automatically assign applicants to time slots. By doing away with the need for manual searching and coordination, these systems guarantee an equitable and effective distribution of slots based on availability.
3. Automation and integration techniques are being used to increase the effectiveness of the slot booking process. In order to enable real-time updates, customised notifications, and automated slot allocation based on established rules, the Visa appointment systems must be integrated with CRM platforms or other software solutions.
4. Data Analysis and Predictive Models: To create predictive models that can estimate slot availability and demand, some organisations examine historical data and patterns. These algorithms optimise slot allocation, cut wait times, and boost overall booking process effectiveness by utilising data analytics.

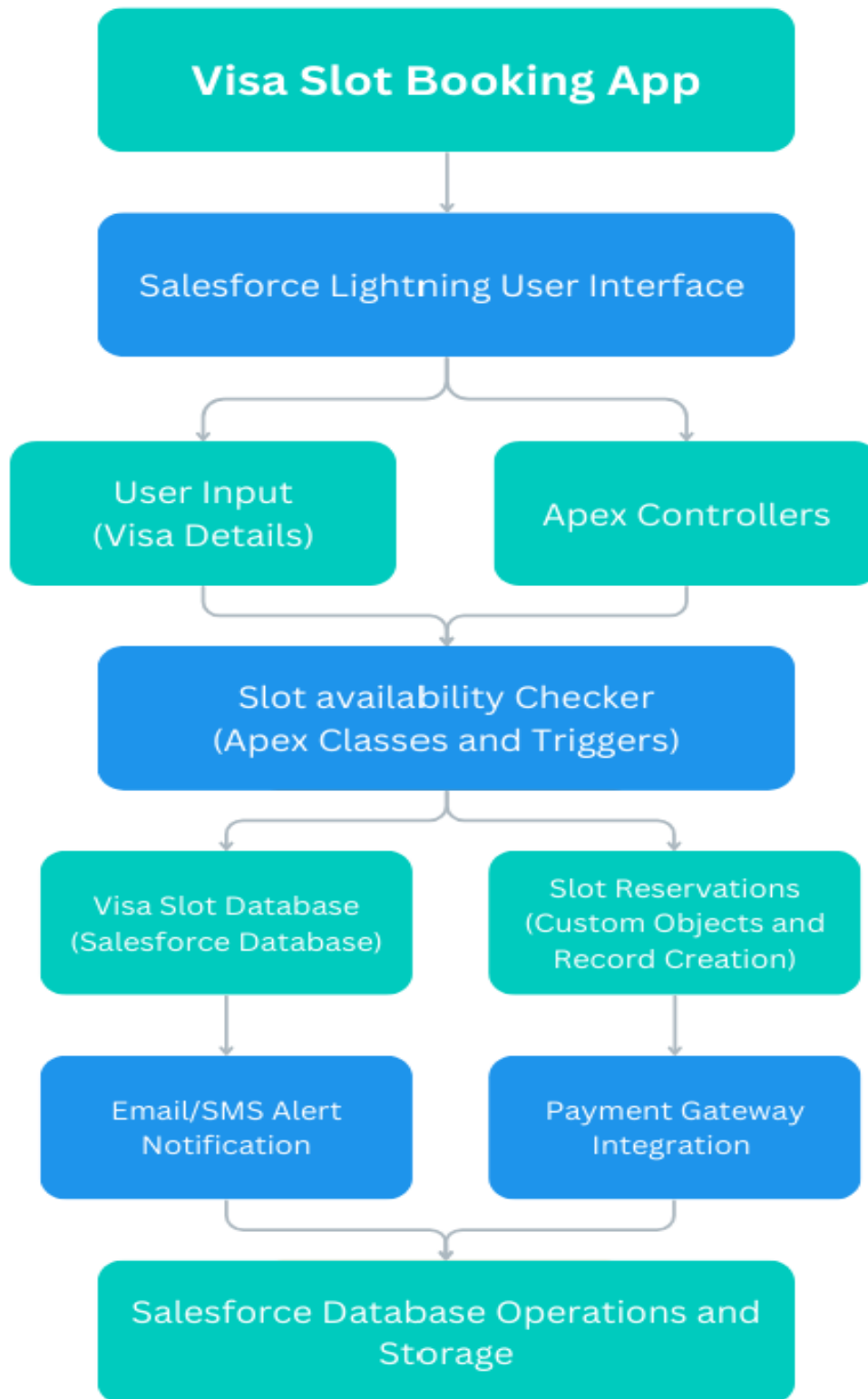
2.2 Proposed solution What is the method or solution suggested by you?

Our suggested solution is a cutting-edge CRM application created on the Salesforce platform to address the current issues. A user-friendly interface, automated slot availability updates, personalised notifications, and powerful data management capabilities are some of the application's standout features. The application seeks to revolutionise the way VISA appointments are planned by utilising the power of Salesforce CRM to provide applicants and organisations with a streamlined and effective VISA slot booking experience.

The Salesforce CRM application for scheduling VISA slots is poised to significantly alter the VISA application process. Candidates may anticipate a hassle-free experience thanks to an easy-to-use platform, and businesses gain from increased customer satisfaction and resource efficiency. This initiative has the potential to significantly alter immigration and foreign travel by streamlining the entire VISA appointment booking procedure.

3. THEORITICAL ANALYSIS:

3.1 Block diagram Diagrammatic overview of the project:



3.2 Hardware/Software designing Hardware and software requirements of the project:

The hardware needs are frequently handled by Salesforce as part of their cloud infrastructure when creating a visa slot booking application on the Salesforce platform. As a result, we won't need to bother about the particular hardware parts. However, we must take into account the project's software requirements. The following are the essential software elements needed:

1. **Salesforce Platform:** The primary software requirement is the Salesforce platform itself, which provides a cloud-based infrastructure and a suite of tools for application development, data storage, and management.
2. **Salesforce Lightning:** Salesforce Lightning is the user interface framework provided by Salesforce. It allows you to create visually appealing and responsive user interfaces for your application.
3. **Apex:** Apex is the programming language used in the Salesforce platform. You will need to have a good understanding of Apex for implementing the business logic and customizing the behaviour of the application.
4. **Visualforce:** Visualforce is a markup language used for creating custom user interfaces in Salesforce. It is often used in conjunction with Apex to create dynamic and interactive pages.
5. **Salesforce Database:** Salesforce provides a built-in database called Salesforce Database or Salesforce Objects. You will use this to store and manage data related to visa slots, user details, reservations, and other relevant information.
6. **Salesforce APIs:** Salesforce provides a rich set of APIs that allow you to interact with the platform and integrate with external systems. You may need to use these APIs for tasks like sending email notifications, integrating with payment gateways, or connecting to external services.
7. **Email and SMS Services:** Depending on your requirements, you may need to integrate with email and SMS services to send notifications and alerts to users. Salesforce provides APIs and integration capabilities for such services.
8. **Payment Gateway Integration:** If your visa slot booking application requires online payment processing, you will need to integrate with a payment gateway service. Salesforce provides APIs and integration tools to connect with popular payment gateway providers.
9. **Security Features:** Salesforce has built-in security features to protect your application and data. These include user authentication, role-based access control, and data encryption. You should utilize these features to ensure the security of your application.
10. **Monitoring and Analytics:** Salesforce provides monitoring and analytics tools to track the performance of your application, monitor user activity, and generate reports. Utilize these tools to gain insights and optimize your application.

These are the main software requirements for creating a Salesforce platform application for booking visa slots. Utilising the Salesforce platform's features will allow you to create a secure, scalable, and adaptable application that is tailored to your unique requirements.

4. EXPERIMENTAL INVESTIGATIONS:

There are a number of significant studies and investigations that may be done when working on the solution for a visa slot booking application. These seek to guarantee that the application satisfies specifications and successfully overcomes difficulties. The following are some crucial examinations and analyses that may be done throughout the development process:

- ✓ **Analysis of User Requirements:** It is essential to comprehend the wants and demands of the users. It might be beneficial to conduct seminars, surveys, or interviews with potential customers, visa applicants, or service suppliers. This study aids in establishing the application's functionality, user interface, and general user experience.
- ✓ **Technical Feasibility Study:** Determining the technical viability entails assessing the tools, infrastructure, and technological stack needed to create the application. Examine if the project needs and the selected technology, such as the Salesforce platform, are compatible. Check to see if the platform's capabilities allow for the implementation of the required functionality.
- ✓ **Analysis of Historical Data on Visa Slot Availability:** To pinpoint peak periods, slot demand, and potential bottlenecks, analyse historical data on visa slot availability trends. This study aids in streamlining user experience and slot reservation process optimisation.
- ✓ **Integration Analysis:** Investigate the application's integration requirements by doing an integration analysis. The linkages with external systems, such as payment gateways, email/SMS services, or notification systems, that are required should be determined. Examine whether integrating these systems with the selected technology stack is feasible and compatible.
- ✓ **Security Analysis:** Perform a thorough security analysis to find any application-related risks or vulnerabilities. Examine the need for data security, encryption techniques, secure communication methods, and access restrictions. This evaluation contributes to the security and legal compliance of the application.
- ✓ **Performance and Scalability Analysis:** Investigate the application's scalability needs as well as the projected user load, concurrent usage, and usage patterns. Perform load testing and evaluate the system's performance in various circumstances. Make sure the programme can manage the expected user volume and locate any potential performance bottlenecks.
- ✓ **User Acceptance Testing (UAT):** Conduct UAT to include customers in the testing procedure. Obtain user feedback to confirm the app's usability, functionality, and general level of user happiness. Before the programme is released, this research aids in locating any usability problems or potential development areas.

These studies and analyses aid in the creation of a reliable and simple visa slot booking solution. They aid in comprehending user demands, technological viability, market context, security considerations, performance needs, and user pleasure, eventually resulting in a successful application that satisfies the target audience.

5. FLOWCHART:

The diagram showing the control flow of the solution:



6. RESULTS :

1. Creation of Developer Org:

The screenshot shows the 'Personal Information' form in the Book My Visa system. The form is divided into two main sections: 'Details' and 'Address'. The 'Details' section contains fields for First Name, Last Name, Alias, Email, Username, Nickname, Phone, Extension, Fax, and Mobile. The 'Address' section contains fields for Street, City, State/Province, and Zip/Postal Code. The form is titled 'Personal Information' and has a 'Help for this Page' link. The 'Details' section has a red indicator for 'Required Information'.

Book My Visa

Passports Visa Slots Payments Reports Dashboards

Quick Find

My Personal Information

- Advanced User Details
- Approver Settings
- Authentication Settings for External Systems
- Change My Password
- Connections
- External Credentials
- Grant Account Login Access
- Language & Time Zone
- Login History
- Personal Information
- Reset My Security Token
- Security Central

Display & Layout

Email

Chatter

Personal Information

Details

First Name: Avinash

Last Name: Roy

Alias: ARoy

Email: avinashroy45678@gmail.cc

Username: bellion@sa.com

Nickname: User168804547456787185

Phone:

Extension:

Fax:

Mobile: +91 9109266721 Example: +1 5035550123

Address

Street:

City:

State/Province:

Zip/Postal Code:

2. Creation Of Custom Object Passport:

The screenshot shows the 'Passports' table in the Book My Visa system. The table has a 'Passport Number' column and a 'Details' column. The table is titled 'Passports' and has a 'Recently Viewed' filter. The table contains 10 items, which are listed in the table below.

Book My Visa

Passports Visa Slots Payments Reports Dashboards

Passports

Recently Viewed

10 items • Updated a few seconds ago

Search this list...

New Import Change Owner

	Passport Number	Details
1	PR2037947	
2	QR739486	
3	OP602814	
4	MN485760	
5	KL369121	
6	IJ246810	
7	GH135792	
8	EF246813	
9	AB123456	
10	CD987654	

The screenshot shows the 'Details' page for the passport GH135792. The page is divided into two main sections: 'Related' and 'Details'. The 'Details' section contains fields for Passport Number, Full Name, Contact Number, Permanent Address, Created By, and Last Modified By. The 'Related' section contains fields for Owner, Full Name, Contact Number, Permanent Address, Created By, and Last Modified By.

Book My Visa

Passports Visa Slots Payments Reports Dashboards

Passport GH135792

Related Details

Passport Number: GH135792

Full Name: Michael Brown

Contact Number: 56.56.789

Permanent Address: 321 Pine Street

Created By: Avinash Roy, 02/07/2023, 3:51 pm

Last Modified By: Avinash Roy, 02/07/2023, 3:51 pm

Owner: Avinash Roy

The screenshot shows the 'Details' page for the passport IJ246810. The page is divided into two main sections: 'Related' and 'Details'. The 'Details' section contains fields for Passport Number, Full Name, Contact Number, Permanent Address, Created By, and Last Modified By. The 'Related' section contains fields for Owner, Full Name, Contact Number, Permanent Address, Created By, and Last Modified By.

Book My Visa

Passports Visa Slots Payments Reports Dashboards

Passport IJ246810

Related Details

Passport Number: IJ246810

Full Name: Emily Davis

Contact Number: 44.45.566

Permanent Address: 987 Maple Avenue

Created By: Avinash Roy, 02/07/2023, 3:52 pm

Last Modified By: Avinash Roy, 02/07/2023, 3:52 pm

Owner: Avinash Roy

3. Creation Of Custom Object-Visa Slot:

Visa Slots

Recently Viewed

9 items • Updated a few seconds ago

Search this list...

Visa Slot Number	
1 V-00007	
2 V-00008	
3 V-00009	
4 V-00006	
5 V-00005	
6 V-00004	
7 V-00003	
8 V-00002	
9 V-00001	

Visa Slot V-00007

Related Details

Visa Slot Number V-00007

Passport Number AB123456

Status Cancel

Location Argentina

Time 17/05/2023, 4:00 pm

Created By Avinash Roy, 02/07/2023, 10:45 pm

Last Modified By Avinash Roy, 02/07/2023, 10:45 pm

Visa Slot V-00003

Related Details

Visa Slot Number V-00003

Passport Number MN485760

Status Cancel

Location Mexico

Time 02/07/2023, 12:00 pm

Created By Avinash Roy, 02/07/2023, 4:03 pm

Last Modified By Avinash Roy, 02/07/2023, 4:03 pm

4. Create Of Custom Object- Payment:

Payments

Recently Viewed

5 items • Updated a few seconds ago

Search this list...

Transaction Id	
1 TRN-0006	
2 TRN-0005	
3 TRN-0004	
4 TRN-0003	
5 TRN-0002	

[Book My Visa](#)
[Passports](#)
[Visa Slots](#)
[Payments](#)
[Reports](#)
[Dashboards](#)

Payment

TRN-0003

Related

Details

Transaction Id

TRN-0003

Owner

Avinash Roy

Transaction Id

3

Payment Mode

Credit Card

Card Number

12234454

Cancel Transaction

YES

Visa Slot Number

V-00002

Created By

Avinash Roy, 02/07/2023, 10:52 pm

Last Modified By

Avinash Roy, 02/07/2023, 10:53 pm

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[Reports](#)
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Payment

TRN-0005

Related

Details

Transaction Id

TRN-0005

Owner

Avinash Roy

Transaction Id

5

Payment Mode

Credit Card

Card Number

3462623

Cancel Transaction

YES

Visa Slot Number

V-00005

Created By

Avinash Roy, 02/07/2023, 10:57 pm

Last Modified By

Avinash Roy, 02/07/2023, 10:57 pm

5. Report Creation:

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[Payments](#)
[Reports](#)
[Dashboards](#)

Report: Passports with Visa Slots

Passport with Visa Location

Enable Field Editing

Q

Add Chart

▼

↺

Edit

Total Records

9

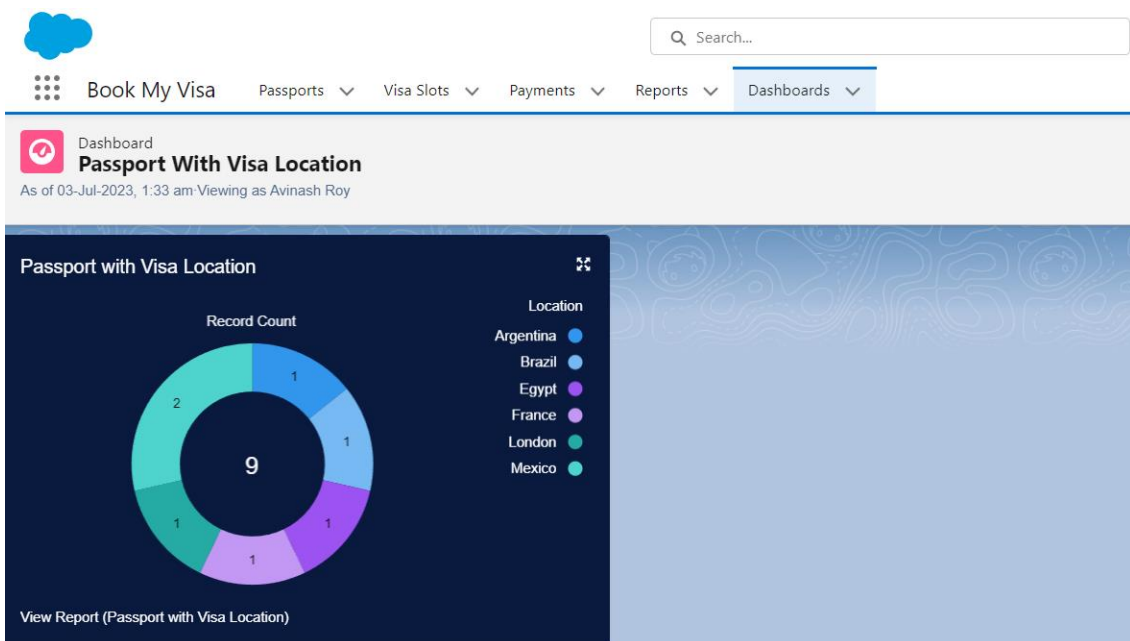
Location	Passport: Passport Number	AB123456	IJ246810	KL369121	MN405760	OP602814	PR2037947	QR739406	Total
<input type="checkbox"/> Argentina	Record Count	1	0	0	0	0	0	0	1
<input type="checkbox"/> Brazil	Record Count	0	0	1	0	0	0	0	1
<input type="checkbox"/> Egypt	Record Count	0	1	0	0	0	0	0	1
<input type="checkbox"/> France	Record Count	0	1	0	0	0	0	0	1
<input type="checkbox"/> London	Record Count	0	0	1	0	0	0	0	1
<input type="checkbox"/> Mexico	Record Count	0	0	0	1	0	1	0	2

Details (9 Rows)

Click an intersection in the table above to filter details.

Visa Slot: Visa Slot Number
1 V-00007
2 V-00004
3 V-00005
4 V-00006
5 V-00009
6 V-00002

6. Dashboards:



7. ADVANTAGES & DISADVANTAGES:

Advantages:

CRM programmes like Salesforce offer a centralised platform to store and manage all customer data pertaining to visa reservations. Customer information may now be easily accessed, retrieved, and analysed.

Streamlined Booking procedure: A CRM solution can automate and streamline the booking procedure for visa slots. It minimises laborious paperwork and lowers the possibility of mistakes, increasing total productivity.

Personalised client interactions are made possible by CRM solutions, enhancing the customer experience. The ability to better serve individual client demands is made possible by keeping track of consumer preferences and history.

Real-time slot availability tracking is possible through integration between the CRM application and the visa slot availability system. Users may now easily identify and reserve spots without the requirement for human verification.

Salesforce CRM's reporting and analytics tools are feature-rich, enabling companies to learn more about consumer behaviour, visa booking trends, and other pertinent variables. Making educated judgements and optimising operations are both possible with this data.

Disadvantages:

Initial Setup and modification: To conform to the particular requirements for visa booking, initial setup and modification are needed when implementing a CRM solution like Salesforce. This can take a lot of expertise, time, and time.

Cost: Subscription fees, licencing fees, and customisation prices are frequently associated with CRM programmes. The price of utilising Salesforce CRM may be a detriment to some firms, depending on the size of the organisation and the scope of operations.

Salesforce CRM has a steep learning curve and a wide range of features and functionalities. To effectively use and navigate the system, users may need training, which might take time and resources.

Integration difficulties might arise when integrating a CRM programme with pre-existing databases and systems, particularly when there are compatibility problems or a need for specialised interfaces. It might need more technical know-how or materials.

Dependency on Internet Access: Because CRM solutions are cloud-based, constant internet access is necessary to access and use the system. Any network problems could make it difficult to book a visa.

8. APPLICATIONS:

The CRM application that aids in scheduling a visa slot can be used in a variety of settings where appointment scheduling and visa processing are necessary. Here are a few probable fields of use:

Consulates & Embassies: To organise and streamline the booking of visa appointments, consulates and embassies can make use of CRM solutions. It makes it possible to manage visa applications, make appointment schedules, and communicate with applicants effectively.

Companies or organisations that offer visa processing services can use CRM systems to manage visa bookings on their customers' behalf. It supports the automation of appointment scheduling, the upkeep of customer information, and the tracking of visa application status.

Travel agencies: Travel agencies frequently help clients get the visas they need for their travels. To provide their clients with a hassle-free travel experience, travel companies can use CRM applications to schedule appointments for visas, manage paperwork relevant to visas, and monitor deadlines for visa processing.

Large firms that operate internationally usually handle the visa processing for their staff. HR departments may manage employee visa requirements, schedule appointments, and keep track of visa applications and approvals with the help of a CRM tool.

Immigration law businesses: To manage visa-related duties effectively, immigration law firms might make use of CRM software. This include scheduling visa consultations, compiling client data, monitoring case development, and verifying adherence to immigration laws.

9. FUTURE SCOPE:

Future improvements could include a number of the following:

Mobile Application: The convenience of scheduling visa slots on-the-go can be offered to users by creating a mobile application that interfaces with the CRM system. Candidates might use their smartphones or tablets to access their accounts, check on availability, and make appointments.

Automated Notifications: The CRM application can implement automated notifications to inform applicants of the progress of their visa applications, appointment confirmations, and any updates or modifications to the procedure. By doing this, communication would be improved and manual follow-ups would be unnecessary.

Integration with Biometric Systems: By integrating the CRM application with biometric systems like fingerprint or facial recognition, the identification procedure for visa appointments can be made more secure and efficient. By automating identity verification, this connection would lower the risk of fraudulent activity.

Integration with External Systems: By enhancing the CRM application's ability to integrate with external systems like government systems for processing visas or platforms for scheduling

appointments, data exchange can be streamlined and real-time updates on visa availability and status can be ensured.

10. CONCLUSION:

In conclusion, there are a number of benefits and drawbacks for businesses engaged in visa processing and appointment scheduling provided by the CRM application used to reserve a visa slot on Salesforce. Through the powerful capabilities of Salesforce CRM, the application enables reporting and analytics, centralises data administration, accelerates the booking process, improves customer experience, gives real-time availability tracking, and offers.

The initial configuration and customization of the CRM programme are difficult, nevertheless. Additionally, there may be a learning curve for users as they navigate the expansive Salesforce platform, and technical difficulties can arise when connecting the programme with current systems. The dependence on constant internet connectivity is another aspect to take into account.

The CRM programme can be used in a variety of settings despite these difficulties, including consulates and embassies, visa processing companies, travel agencies, corporate HR departments, immigration law firms, educational institutions, and online visa service providers. It aids in automating the scheduling of visa appointments, managing client data, monitoring the progress of visa applications, and assuring adherence to immigration laws.

Overall, the Salesforce CRM platform offers a useful tool for businesses involved in visa processing, enhancing productivity, customer satisfaction, and data management. Organisations can use the benefits of this CRM application to improve their entire operations in the visa services sector and streamline their visa booking processes by carefully weighing the pro's and con's.

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