# Step-by-Step Fields to Capture

1. Sending Agreement to Client

This step involves sending a service agreement to the client, outlining the consultancy’s terms. Capturing key details ensures clarity and tracks client acknowledgment.

- Fields:

- Agreement Type (e.g., Standard, Premium)

- Agreement Document (file upload or link)

- Sent Date

- Client Signature Date (if applicable)

- Status (Draft, Sent, Signed, Rejected)

- Notes (e.g., special conditions or client comments)

2. Scheduling Meeting with Client

Scheduling a meeting to discuss visa requirements or collect initial information requires tracking logistical details and outcomes.

- Fields:

- Meeting Type (e.g., Initial Consultation, Document Review)

- Scheduled Date and Time

- Location (e.g., Office, Virtual)

- Meeting Notes (key discussion points)

- Follow-up Actions (e.g., tasks assigned post-meeting)

3. Information and Document Collection

Collecting required documents is a critical step, as visa applications often require specific paperwork like passports or financial statements.

- Fields:

- Document Type (e.g., Passport, Bank Statement, Invitation Letter)

- Document File (upload or link)

- Upload Date

- Verification Status (Pending, Verified, Rejected)

- Verification Notes (e.g., reasons for rejection)

- Collection Status (Pending, Completed)

4. Filling Visa Application Form

Submitting the visa application form, either online or offline, requires tracking the form details and submission status.

- Fields:

- Visa Type (e.g., Tourist, Student, Work)

- Application Form (file upload or link)

- Filling Date

5. Document Preparation

Preparing supporting documents, such as dummy hotel bookings or flight itineraries, is often necessary for visa applications.

- Fields:

- Document Type (e.g., Flight Itinerary, Hotel Booking, Invitation Letter)

- Document File (upload or link)

- Preparation Date

- Booking Portal

- Booking ID

- Hotel Name

- Checkin date

- Checkout Date

- Last date of cancellation

- Lead passenger name

- credit card used

- Booking amount

- booking cancellation charges (if any)

- charges if cancelled after last date of cancellation

- Notes (e.g., specific details about the document)

6. Sending Draft Document to Client for Approval

Before final submission, draft documents should be sent to the client for review and approval to ensure accuracy.

- Fields:

- Document Type

- Draft Version

- Sent Date

- Client Response Date

- Approval Status (Pending, Approved, Rejected)

- Feedback or Revision Requests

7. Collecting Remaining Payment

Managing payments, including visa fees and consultancy fees, ensures financial obligations are met.

- Fields:

- Payment Type (e.g., Visa Fee, Service Fee)

- Amount

- Payment Method (e.g., Bank Transfer, Credit Card)

- Transaction ID

- Payment Date

- Status (Pending, Received, Overdue)

- Due Date

8. Appointment Booking with Embassy

Scheduling visa interviews or biometrics appointments requires precise tracking to avoid missed deadlines.

- Fields:

- Appointment Type (e.g., Visa Interview, Biometrics)

- Embassy or Consulate Name

- Appointment Date and Time

- Booking Confirmation Number

- Address of consulate

- Status (Booked, Attended, Missed)

- Notes (e.g., special instructions)

9. Recording Outcome of Visa Appointment

Recording the visa decision is crucial for tracking the final outcome and planning next steps.

- Fields:

- Visa Type

- Visa Country

- Visa Outcome (Approved, Rejected, Pending)

- Decision Date

- Visa Number (if approved)

- Rejection Reason (if rejected)

- Notes (e.g., next steps or appeal options)

Booking ID This document outlines the essential data fields to capture in a Customer Relationship Management (CRM) system for a visa consultancy, covering each step of the visa application process. These fields ensure efficient tracking, compliance with visa requirements, and seamless client management.

1. Sending Agreement to Client

This step involves sending a service agreement to the client, formalizing the consultancy’s role.

| Field Name | Description | Example Value |

|-------------------------|--------------------------------------------------|-----------------------------------|

| Agreement Type | Type of service agreement | Standard, Premium |

| Agreement Document | File or link to the agreement | [Link to PDF] |

| Sent Date | Date the agreement was sent | 2025-05-20 |

| Client Signature Date | Date the client signed the agreement | 2025-05-22 |

| Status | Current status of the agreement | Draft, Sent, Signed, Rejected |

| Notes | Additional comments or special conditions | Client requested clarification |

2. Scheduling Meeting with Client

Scheduling a meeting to discuss visa requirements or collect information requires logistical tracking.

| Field Name | Description | Example Value |

|-------------------------|--------------------------------------------------|-----------------------------------|

| Meeting Type | Purpose of the meeting | Initial Consultation, Document Review |

| Scheduled Date and Time | Date and time of the meeting | 2025-05-25 10:00 AM |

| Location | Meeting location (physical or virtual) | Zoom, Office |

| Attendees | Participants in the meeting | Client: John Doe, Consultant: Jane Smith |

| Meeting Notes | Key points discussed | Discussed visa types and documents |

| Follow-up Actions | Tasks assigned post-meeting | Request passport copy |

3. Information and Document Collection

Collecting required documents is critical for visa applications, often including identity and supporting documents.

| Field Name | Description | Example Value |

|-------------------------|--------------------------------------------------|-----------------------------------|

| Document Type | Type of document collected | Passport, Bank Statement |

| Document File | File or link to the document | [Link to scanned passport] |

| Upload Date | Date the document was uploaded | 2025-05-26 |

| Verification Status | Status of document verification | Pending, Verified, Rejected |

| Verification Notes | Reasons for rejection or additional comments | Missing signature |

| Collection Status | Status of document collection | Pending, Completed |

4. Filing Visa Application Form

Submitting the visa application form requires tracking form details and submission status.

| Field Name | Description | Example Value |

|-------------------------|--------------------------------------------------|-----------------------------------|

| Visa Type | Type of visa being applied for | Tourist, Student, Work |

| Application Form | File or link to the completed form | [Link to DS-160 form] |

| Submission Date | Date the form was submitted | 2025-05-28 |

| Application Status | Current status of the application | Submitted, In Process, Approved, Rejected |

| Rejection Reason | Reason for rejection, if applicable | Incomplete documentation |

| Notes | Additional submission details | Submitted via online portal |

5. Document Preparation

Preparing supporting documents, such as dummy bookings, is often required for visa applications.

| Field Name | Description | Example Value |

|-------------------------|--------------------------------------------------|-----------------------------------|

| Document Type | Type of prepared document | Flight Itinerary, Hotel Booking |

| Document File | File or link to the document | [Link to itinerary PDF] |

| Preparation Date | Date the document was prepared | 2025-05-30 |

| Status | Status of the document | Draft, Final, Submitted |

| Notes | Specific details about the document | Hotel booking for Paris |

6. Sending Draft Document to Client for Approval

Draft documents should be sent to the client for review before final submission.

| Field Name | Description | Example Value |

|-------------------------|--------------------------------------------------|-----------------------------------|

| Document Type | Type of document sent for approval | Flight Itinerary, Hotel Booking |

| Draft Version | Version number of the draft | v1.0 |

| Sent Date | Date the draft was sent | 2025-06-01 |

| Client Response Date | Date the client responded | 2025-06-03 |

| Approval Status | Status of client approval | Pending, Approved, Rejected |

| Feedback | Client feedback or revision requests | Change hotel dates |

7. Collecting Remaining Payment

Tracking payments ensures all financial obligations are met.

| Field Name | Description | Example Value |

|-------------------------|--------------------------------------------------|-----------------------------------|

| Payment Type | Type of payment | Visa Fee, Service Fee |

| Amount | Payment amount | $500 |

| Payment Method | Method of payment | Bank Transfer, Credit Card |

| Transaction ID | Unique identifier for the transaction | TXN123456 |

| Payment Date | Date the payment was received | 2025-06-05 |

| Status | Payment status | Pending, Received, Overdue |

| Due Date | Payment due date | 2025-06-04 |

8. Appointment Booking with Embassy

Scheduling visa interviews or biometrics appointments requires precise tracking.

| Field Name | Description | Example Value |

|-------------------------|--------------------------------------------------|-----------------------------------|

| Appointment Type | Type of appointment | Visa Interview, Biometrics |

| Embassy or Consulate | Name of the embassy or consulate | US Embassy, Paris |

| Appointment Date and Time | Date and time of the appointment | 2025-06-10 09:00 AM |

| Booking Confirmation Number | Unique identifier for the appointment | ABC123 |

| Status | Appointment status | Booked, Attended, Missed |

| Notes | Special instructions or comments | Bring original documents |

9. Recording Outcome of Visa Appointment

Recording the visa decision is essential for tracking outcomes and planning next steps.

| Field Name | Description | Example Value |

|-------------------------|--------------------------------------------------|-----------------------------------|

| Visa Outcome | Result of the visa application | Approved, Rejected, Pending |

| Decision Date | Date of the visa decision | 2025-06-15 |

| Visa Number | Visa number, if approved | V12345678 |

| Rejection Reason | Reason for rejection, if applicable | Insufficient funds proof |

| Notes | Additional details or next steps | Appeal planned |

Additional CRM Features

To enhance the CRM’s effectiveness for visa consultancies, consider the following features:

- Visa Type Management: Maintain a master list of visa types (e.g., tourist, student, work) with specific requirements ([US Visa Guide](https://visaandgreencard.com/blog/five-key-steps-in-the-us-visa-application-process/)).

- Country-Specific Requirements: Customize fields for different countries, as requirements vary ([France-Visas](https://france-visas.gouv.fr/en/visa-application-guidelines)).

- Application Tracking: Track the status of each application through its lifecycle.

- Client Communication: Integrate tools for sending reminders, updates, and notifications.

- Team Collaboration: Enable task assignment, note-sharing, and collaboration among consultants.

This structure ensures that the CRM captures all necessary data to manage the visa application process efficiently, providing a clear audit trail and supporting client satisfaction.

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# Detailed Report on Visa Consultancy CRM Data Fields

This report provides a comprehensive guide on the data fields to capture in a Customer Relationship Management (CRM) system for a visa consultancy, aligning with the user’s request to track each step of the visa application process. The fields are designed to ensure compliance with visa requirements, streamline operations, and enhance client management. The steps and fields are informed by standard visa application processes, as outlined in resources like [BankBazaar](https://www.bankbazaar.com/visa/visa-application-process.html) and [France-Visas](https://france-visas.gouv.fr/en/visa-application-guidelines), and tailored for a consultancy’s operational needs.

1. Sending Agreement to Client

The first step involves formalizing the consultancy-client relationship by sending a service agreement. This step is analogous to the initial visa application form submission, where terms are agreed upon. Capturing detailed data ensures clarity and tracks client acknowledgment.

| Field Name | Description | Example Value |

|-------------------------|--------------------------------------------------|-----------------------------------|

| Agreement Type | Type of service agreement | Standard, Premium |

| Agreement Document | File or link to the agreement | [Link to PDF] |

| Sent Date | Date the agreement was sent | 2025-05-20 |

| Client Signature Date | Date the client signed the agreement | 2025-05-22 |

| Status | Current status of the agreement | Draft, Sent, Signed, Rejected |

| Notes | Additional comments or special conditions | Client requested clarification |

These fields ensure that the consultancy can track the agreement’s progress and maintain a record of client consent, which is critical for legal and operational purposes.

2. Scheduling Meeting with Client

Scheduling a meeting to discuss visa requirements or collect initial information is crucial for setting expectations. This step aligns with scheduling visa interviews or appointments, as noted in [Path2USA](https://www.path2usa.com/us-visa-application-process).

| Field Name | Description | Example Value |

|-------------------------|--------------------------------------------------|-----------------------------------|

| Meeting Type | Purpose of the meeting | Initial Consultation, Document Review |

| Scheduled Date and Time | Date and time of the meeting | 2025-05-25 10:00 AM |

| Location | Meeting location (physical or virtual) | Zoom, Office |

| Attendees | Participants in the meeting | Client: John Doe, Consultant: Jane Smith |

| Meeting Notes | Key points discussed | Discussed visa types and documents |

| Follow-up Actions | Tasks assigned post-meeting | Request passport copy |

These fields help track logistical details and ensure follow-up actions are documented, improving client communication and task management.

3. Information and Document Collection

Collecting required documents is a pivotal step, as visa applications often require specific paperwork, such as passports, photographs, and proof of funds ([Translayte](https://translayte.com/blog/a-step-by-step-guide-to-us-visa-applications)).

| Field Name | Description | Example Value |

|-------------------------|--------------------------------------------------|-----------------------------------|

| Document Type | Type of document collected | Passport, Bank Statement |

| Document File | File or link to the document | [Link to scanned passport] |

| Upload Date | Date the document was uploaded | 2025-05-26 |

| Verification Status | Status of document verification | Pending, Verified, Rejected |

| Verification Notes | Reasons for rejection or additional comments | Missing signature |

| Collection Status | Status of document collection | Pending, Completed |

These fields ensure that all required documents are collected, verified, and tracked, reducing the risk of application delays due to missing paperwork.

4. Filing Visa Application Form

Submitting the visa application form, whether online or offline, is a core step in the process ([France-Visas](https://france-visas.gouv.fr/en/visa-application-guidelines)). Tracking submission details is essential for monitoring progress.

| Field Name | Description | Example Value |

|-------------------------|--------------------------------------------------|-----------------------------------|

| Visa Type | Type of visa being applied for | Tourist, Student, Work |

| Application Form | File or link to the completed form | [Link to DS-160 form] |

| Submission Date | Date the form was submitted | 2025-05-28 |

| Application Status | Current status of the application | Submitted, In Process, Approved, Rejected |

| Rejection Reason | Reason for rejection, if applicable | Incomplete documentation |

| Notes | Additional submission details | Submitted via online portal |

These fields allow the consultancy to monitor the application’s status and address any issues promptly.

5. Document Preparation

Preparing supporting documents, such as dummy hotel bookings or flight itineraries, is often necessary to meet visa requirements ([VisaVersa](https://www.visaversa.com/visa-application-procedure/)).

| Field Name | Description | Example Value |

|-------------------------|--------------------------------------------------|-----------------------------------|

| Document Type | Type of prepared document | Flight Itinerary, Hotel Booking |

| Document File | File or link to the document | [Link to itinerary PDF] |

| Preparation Date | Date the document was prepared | 2025-05-30 |

| Status | Status of the document | Draft, Final, Submitted |

| Notes | Specific details about the document | Hotel booking for Paris |

These fields ensure that all prepared documents are tracked and ready for submission.

6. Sending Draft Document to Client for Approval

Sending draft documents to the client for review ensures accuracy before final submission, similar to reviewing the visa application form ([BankBazaar](https://www.bankbazaar.com/visa/how-to-apply-for-visa.html)).

| Field Name | Description | Example Value |

|-------------------------|--------------------------------------------------|-----------------------------------|

| Document Type | Type of document sent for approval | Flight Itinerary, Hotel Booking |

| Draft Version | Version number of the draft | v1.0 |

| Sent Date | Date the draft was sent | 2025-06-01 |

| Client Response Date | Date the client responded | 2025-06-03 |

| Approval Status | Status of client approval | Pending, Approved, Rejected |

| Feedback | Client feedback or revision requests | Change hotel dates |

These fields track client feedback and ensure documents meet expectations.

7. Collecting Remaining Payment

Managing payments, including visa and consultancy fees, is critical for financial tracking ([US Embassy](https://pg.usembassy.gov/visa-application-step-by-step-instructions/)).

| Field Name | Description | Example Value |

|-------------------------|--------------------------------------------------|-----------------------------------|

| Payment Type | Type of payment | Visa Fee, Service Fee |

| Amount | Payment amount | $500 |

| Payment Method | Method of payment | Bank Transfer, Credit Card |

| Transaction ID | Unique identifier for the transaction | TXN123456 |

| Payment Date | Date the payment was received | 2025-06-05 |

| Status | Payment status | Pending, Received, Overdue |

| Due Date | Payment due date | 2025-06-04 |

These fields ensure all payments are tracked and reconciled.

8. Appointment Booking with Embassy

Scheduling visa interviews or biometrics appointments requires precise tracking to avoid delays ([Schengen Visa](https://schengeninsuranceinfo.com/schengen-visa/)).

| Field Name | Description | Example Value |

|-------------------------|--------------------------------------------------|-----------------------------------|

| Appointment Type | Type of appointment | Visa Interview, Biometrics |

| Embassy or Consulate | Name of the embassy or consulate | US Embassy, Paris |

| Appointment Date and Time | Date and time of the appointment | 2025-06-10 09:00 AM |

| Booking Confirmation Number | Unique identifier for the appointment | ABC123 |

| Status | Appointment status | Booked, Attended, Missed |

| Notes | Special instructions or comments | Bring original documents |

These fields ensure appointments are scheduled and attended on time.

9. Recording Outcome of Visa Appointment

Recording the visa decision is crucial for tracking outcomes and planning next steps ([BankBazaar](https://www.bankbazaar.com/visa/visa-application-process.html)).

| Field Name | Description | Example Value |

|-------------------------|--------------------------------------------------|-----------------------------------|

| Visa Outcome | Result of the visa application | Approved, Rejected, Pending |

| Decision Date | Date of the visa decision | 2025-06-15 |

| Visa Number | Visa number, if approved | V12345678 |

| Rejection Reason | Reason for rejection, if applicable | Insufficient funds proof |

| Notes | Additional details or next steps | Appeal planned |

These fields provide a clear record of the visa outcome and any follow-up actions.

Additional CRM Features

To enhance the CRM’s functionality for visa consultancies, consider the following features:

- Visa Type Management: Maintain a master list of visa types with specific requirements, such as tourist, student, or work visas ([US Visa Guide](https://visaandgreencard.com/blog/five-key-steps-in-the-us-visa-application-process/)).

- Country-Specific Requirements: Customize fields for different countries, as requirements vary significantly ([France-Visas](https://france-visas.gouv.fr/en/visa-application-guidelines)).

- Application Tracking: Implement a system to track the status of each application, ensuring visibility across the lifecycle ([Path2USA](https://www.path2usa.com/us-visa-application-process)).

- Client Communication: Integrate tools for sending automated reminders, updates, and notifications to clients, improving engagement.

- Team Collaboration: Enable task assignment, note-sharing, and collaboration among consultants to streamline operations ([VisaVersa](https://www.visaversa.com/visa-application-procedure/)).

Best Practices for CRM Implementation

- Data Security: Ensure all client data, especially sensitive documents like passports, is stored securely with role-based access controls.

- Automation: Use workflow automation to send notifications for key actions, such as agreement signing or payment due dates.

- Reporting and Analytics: Include features to track application success rates, consultant performance, and client trends to optimize operations.

- Compliance: Ensure the CRM supports compliance with country-specific regulations, such as document translation requirements for France ([France-Visas](https://france-visas.gouv.fr/en/visa-application-guidelines)).

This comprehensive set of fields and features ensures that the CRM supports the visa consultancy’s operational needs, enhances client satisfaction, and maintains compliance with visa application processes.