

CRM APPLICATION THAT HELPS TO BOOK A VISA SLOT

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INTRODUCTION

1.1 Overview

A visa slot management project is a system that is used to track and manage the availability of visa slots, which are appointments that are required for certain visa applications. It might be used by a government agency or a visa processing center to schedule and manage appointments with applicants.

A CRM stands for customer relationship management software. It is a system that helps business manage their relationships with customers and potential customers.

The goal of CRM is to improve customer satisfaction and loyalty and to increase sales.

A CRM solution is a critical part of any business, no matter its size.

CRM systems are generally designed to streamline and improve customer interaction, the sales process, and the running of marketing campaigns. They do this by improving efficiencies across workflow and the sales pipeline—automating tasks, and analyzing data.

A solid CRM strategy provides an all-in-one solution for managing your team's voice, chat, and email touchpoints. They track leads, customer needs, offers, and conversions in one place, and help with optimizing your website and running ad campaigns.

That improves the mechanism behind your business and dramatically increases visibility on your team, customer base, and to the broader public.

Helps to book a visa slot:

This will help you to track and manage the availability of visa slots, which are appointments that are required for certain visa applications.

1.2 purpose:

The CRM system helps companies stay connected to their customers, it acts as a tool used for contact management, productivity, sales management and more.



The CRM system not only helps you improve the customer services but also assists the entire organization to further evolve the customer-centric approach along within sights on which area to improvise in.



One of the biggest gains of this growing trend in the IT department is that the installment is extremely easy.

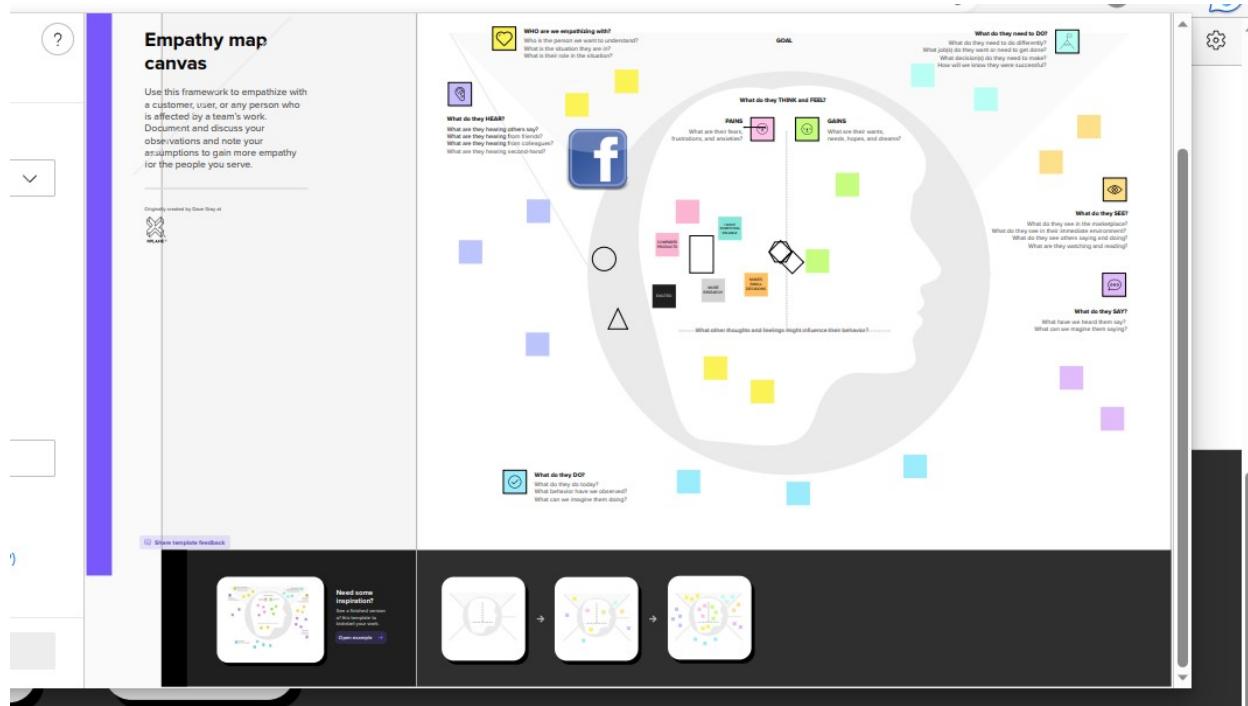
Distinct functions of CRM:

- Equips with an adaptable CRM interface, focusing only on the significant features.
- Sets up a vast range of categories of different projects to choose from.
- Forms fields and module implementations that are related, calculated, customized and dependant.
- Programmed installation of advanced modules along with completely supported upgrades.
- Protection and revelation of information established on the role and profile of the user.
- Configuration made easy with a drag-and-drop preface.
- The distinction of business processes to pair with business requirements.
- The maximization of productivity with configuration and available access to mobile and other devices.

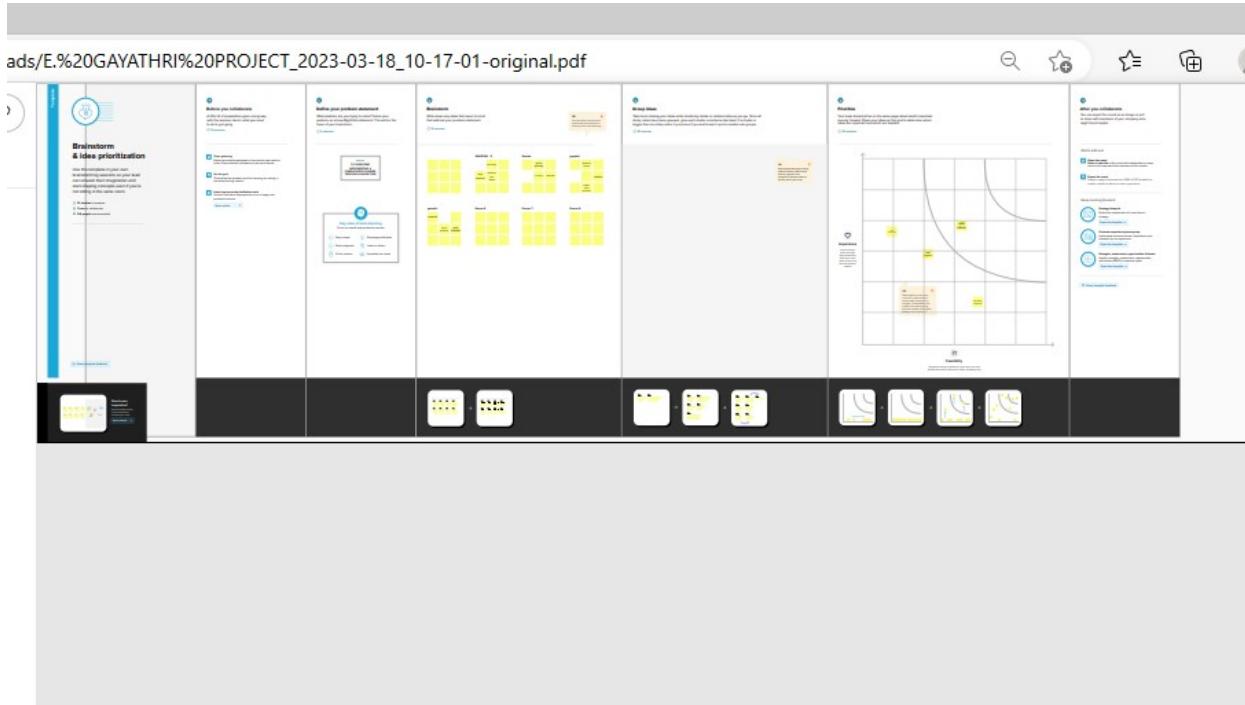


2. Problem Definition & Design Thinking

2.1 Empathy Map



2.2 ideation & Brainstorming map



3. Result

3.1 Data Model:

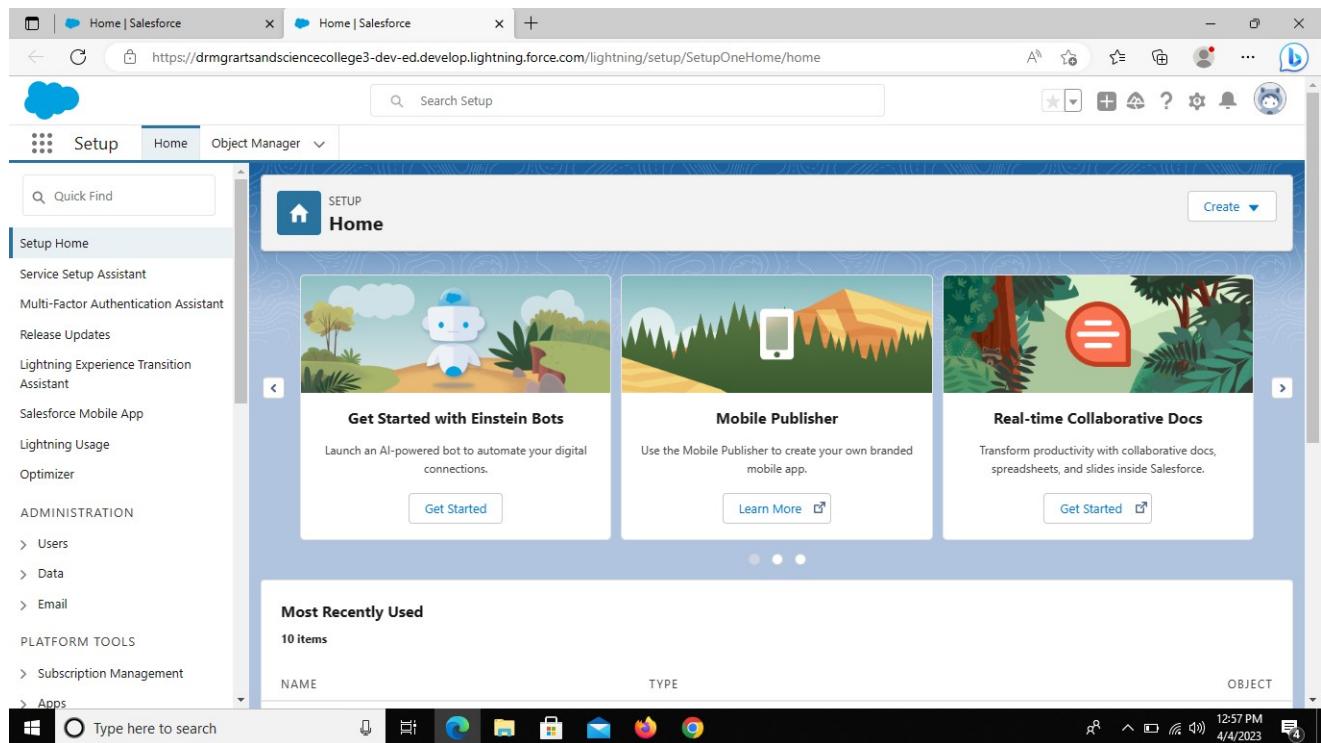
Object name	Fields in the Object	
Passport	Field label	Data type
	passport	text
	Contact number	number
	Full name	text
	Passport number	text
Visa slot	Field label	Data type
	Visa slot	Master detail relationship
	Passport number	Text
	Permenant address	text

payment	Payment mode	Master detail relationship
	Card number	location
	Transaction id (auto number)	number

3.20 Activity & screenshot

Activity 1:

- 1)Creation Developer Account
- 2)Account Activation
- 3) salesforce login



Milestone-2: objects:

Activity 1:

Object Manager | Salesforce

https://drmgrartsandsciencecollege3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Setup Home Object Manager

Object Manager

50+ Items, Sorted by Deployed

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
passport number	passport_number__c	Custom Object		22/03/2023	✓
location	location__c	Custom Object		22/03/2023	✓
visa	visa__c	Custom Object		22/03/2023	✓
passport	passport__c	Custom Object		23/03/2023	✓
Work Type Group Member	WorkTypeGroupMember	Standard Object			
Work Type Group	WorkTypeGroup	Standard Object			
Work Type	WorkType	Standard Object			
Work Step Template	WorkStepTemplate	Standard Object			
Work Step	WorkStep	Standard Object			
Work Plan Template Entry	WorkPlanTemplateEntry	Standard Object			

Type here to search

1:02 PM 3/16/2023 20

salesforce log

passport | Salesforce

login.salesforce

Home | Salesforce

Home | Salesforce

github - Search

Github

GitHub

https://drmgrartsandsciencecollege3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01l2w000003jsov/Details/view

Setup Home Object Manager

Object Manager

SETUP > OBJECT MANAGER

passport

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Details

Description

API Name

passport__c

Custom

Singular Label

passport

Plural Label

passports

Edit Delete

Enable Reports

✓

Track Activities

✓

Track Field History

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

Type here to search

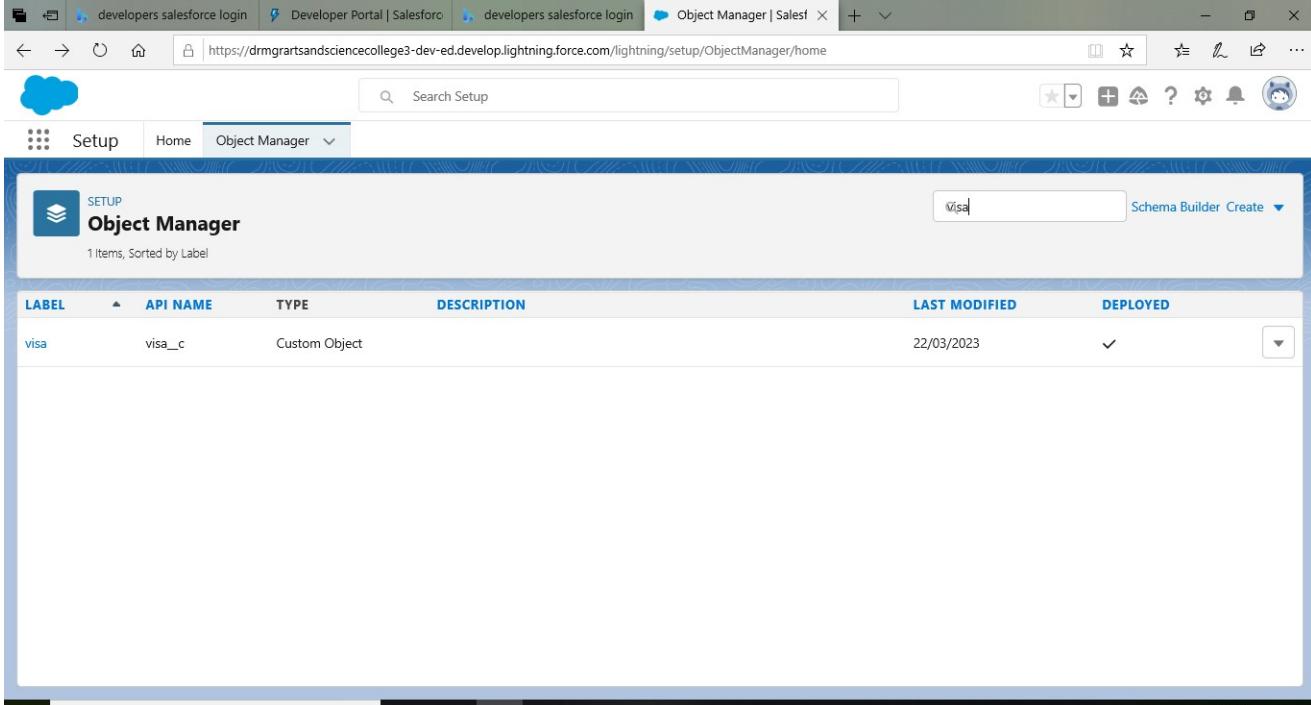
1:25 PM 3/16/2023 20

Activity 2:

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for Setup, Home, and Object Manager. The main title is "SETUP > OBJECT MANAGER" followed by "passport". The left sidebar lists various setup categories under "Fields & Relationships". The main content area displays the "Custom Field Definition Detail" for a field named "location". The "Field Information" section shows the field label as "Location", field name as "location", API name as "location_c", and data type as "Master-Detail". The "Master-Detail Options" section shows it is related to the "Location" object. The bottom section shows a table of fields for the "passport" object, including "Created By", "Last Modified By", "Location", and "passport Name".

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Location	location_c	Master-Detail(Location)	✓	▼
passport Name	Name	Text(80)	✓	▼

Milestone-3: Creation of Relationship



The screenshot shows the Salesforce Object Manager interface. The browser tab is titled "Object Manager | Salesf". The URL is <https://drmgrartsandsciencecollege3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home>. The page displays a table with one item:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
visa	visa__c	Custom Object		22/03/2023	✓

The Windows taskbar at the bottom shows the search bar and system icons.

The screenshot shows the Salesforce Object Manager interface for the 'visa slot' object. The left sidebar lists various configuration tabs: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main details pane shows the following fields:

Description	Enable Reports
API Name visa_slot_c	Track Activities
Custom	Track Field History
Singular Label visa slot	Deployment Status
Plural Label visa slots	Deployed
	Help Settings
	Standard salesforce.com Help Window

At the bottom right of the details pane are 'Edit' and 'Delete' buttons.

The browser address bar shows the URL: <https://drmgrartsandsciencecollege3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003jzkn/Details/view>.

The screenshot shows the Salesforce Object Manager interface for the 'visa slot' object, specifically the 'Fields & Relationships' tab. The left sidebar lists the same configuration tabs as the previous screenshot. The main pane displays a form for creating a new field:

Field Label	passport number
Field Name	passport_number
Description	(empty)
Help Text	(empty)
Child Relationship Name	visa_slots
Sharing Setting	Select the minimum access level required on the Master record to create, edit, or delete related Detail records: <input type="radio"/> Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records. <input checked="" type="radio"/> Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.
Allow reparenting	<input type="checkbox"/> Child records can be reparented to other parent records after they are created
Auto add to custom report type	<input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity

At the top right of the form are 'Previous', 'Next', and 'Cancel' buttons. The browser address bar shows the URL: <https://drmgrartsandsciencecollege3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003jzkn/FieldsAndRelationships/new>.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for 'developers salesforce login', 'Developer Portal | Salesforce', 'Blank page', and 'visa slot | Salesforce'. The main title is 'SETUP > OBJECT MANAGER visa slot'. On the left, a sidebar lists various setup categories under 'Fields & Relationships'. The main content area is titled 'visa slot New Relationship' and 'Step 2. Choose the related object'. It asks 'Select the other object to which this object is related.' with a dropdown menu showing 'passport' selected. Navigation buttons 'Previous', 'Next', and 'Cancel' are at the bottom right.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for 'developers salesforce login', 'Developer Portal | Salesforce', 'Blank page', and 'visa slot | Salesforce'. The main title is 'SETUP > OBJECT MANAGER visa slot'. On the left, a sidebar lists various setup categories under 'Fields & Relationships'. The main content area is titled 'Fields & Relationships' and displays a table of fields. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table rows are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
visa slot Name	Name	Text(80)		✓

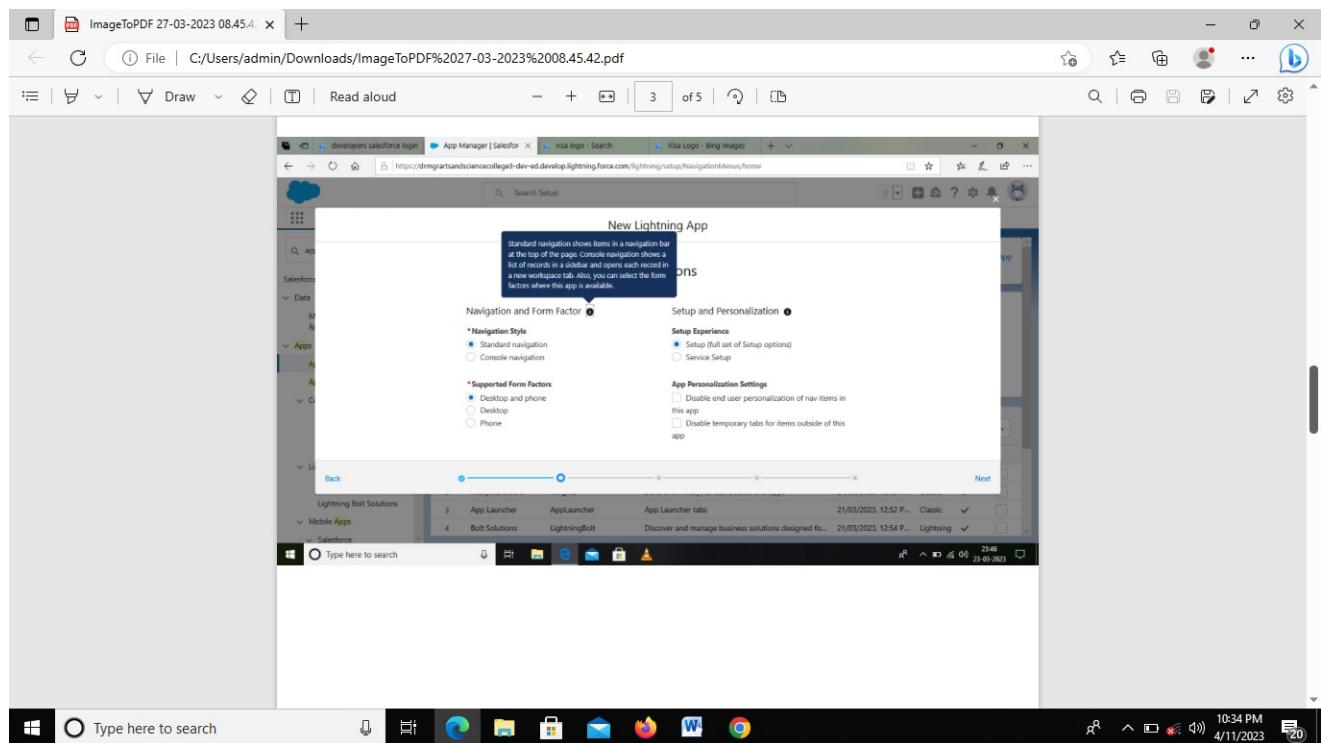
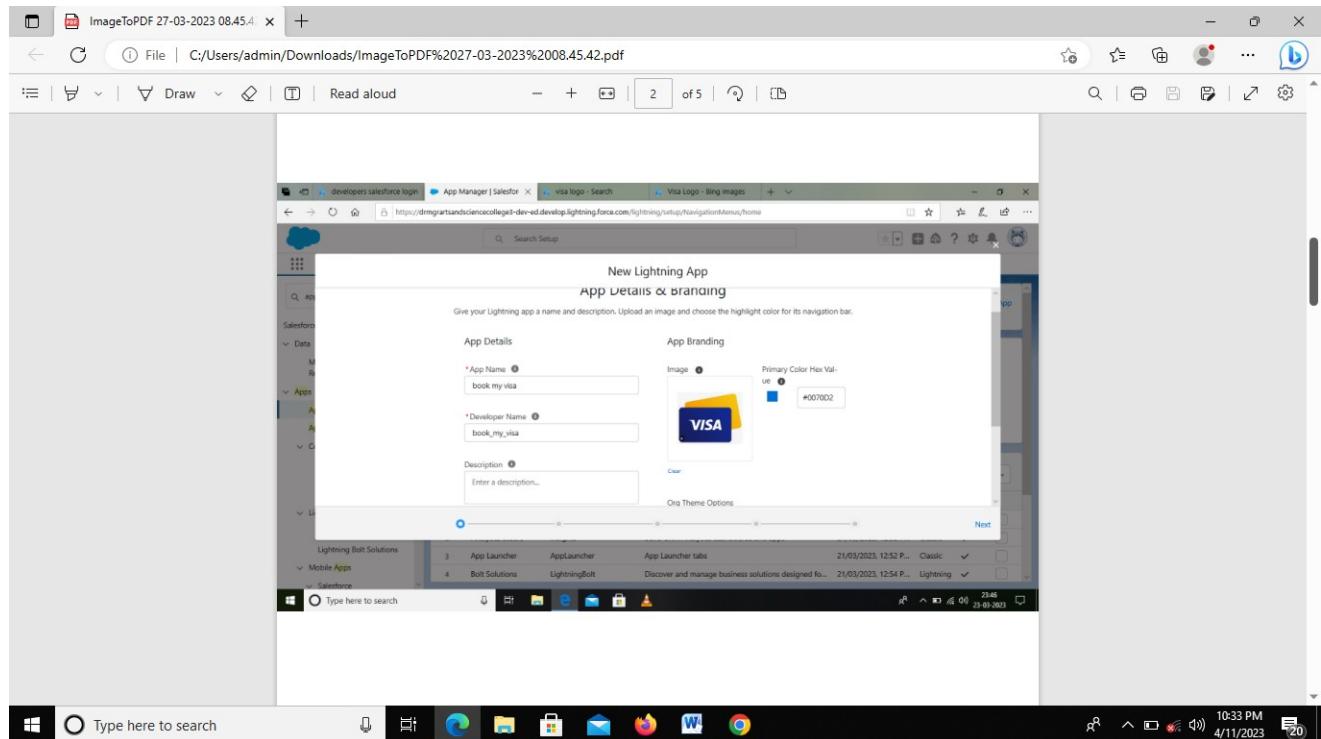
Navigation buttons 'Quick Find', 'NewDeleted Fields', 'Field Dependencies', 'Set History', and 'Tracking' are visible at the top right of the content area. The Windows taskbar at the bottom shows the date and time as 23-03-2023 22:52.

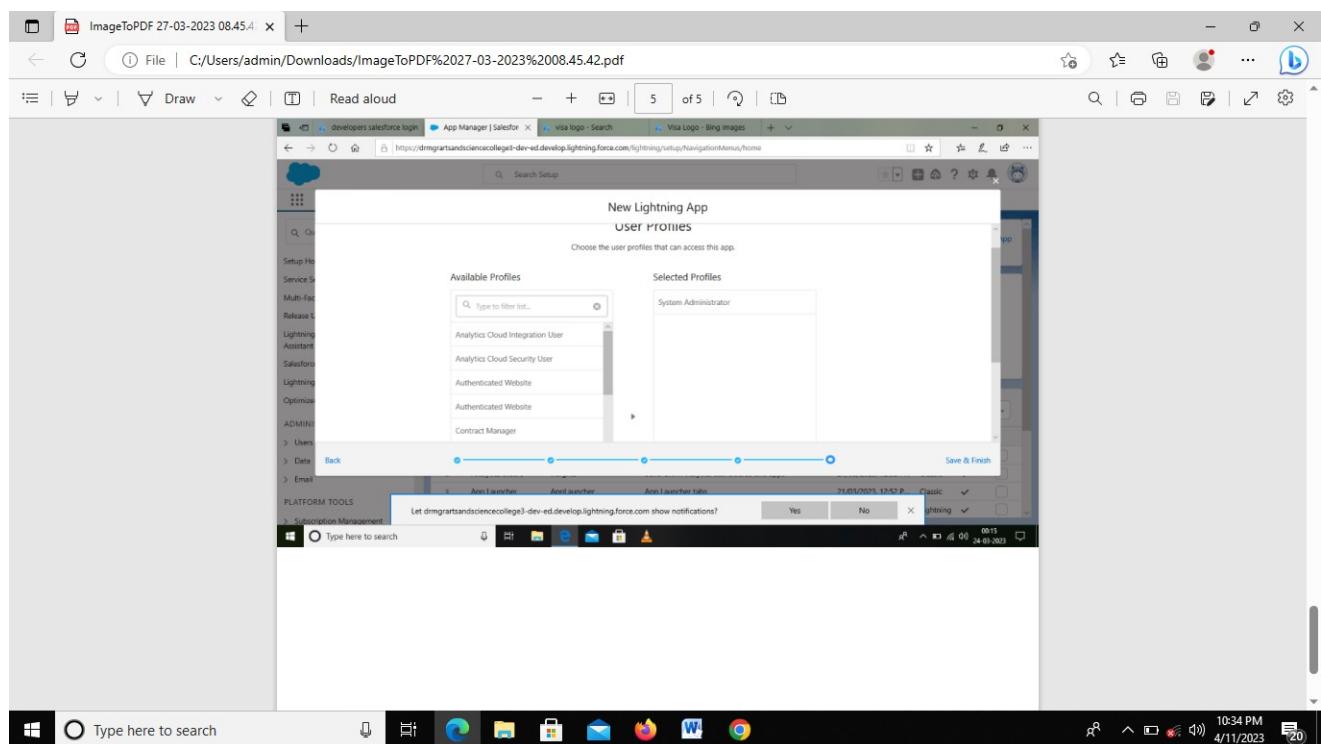
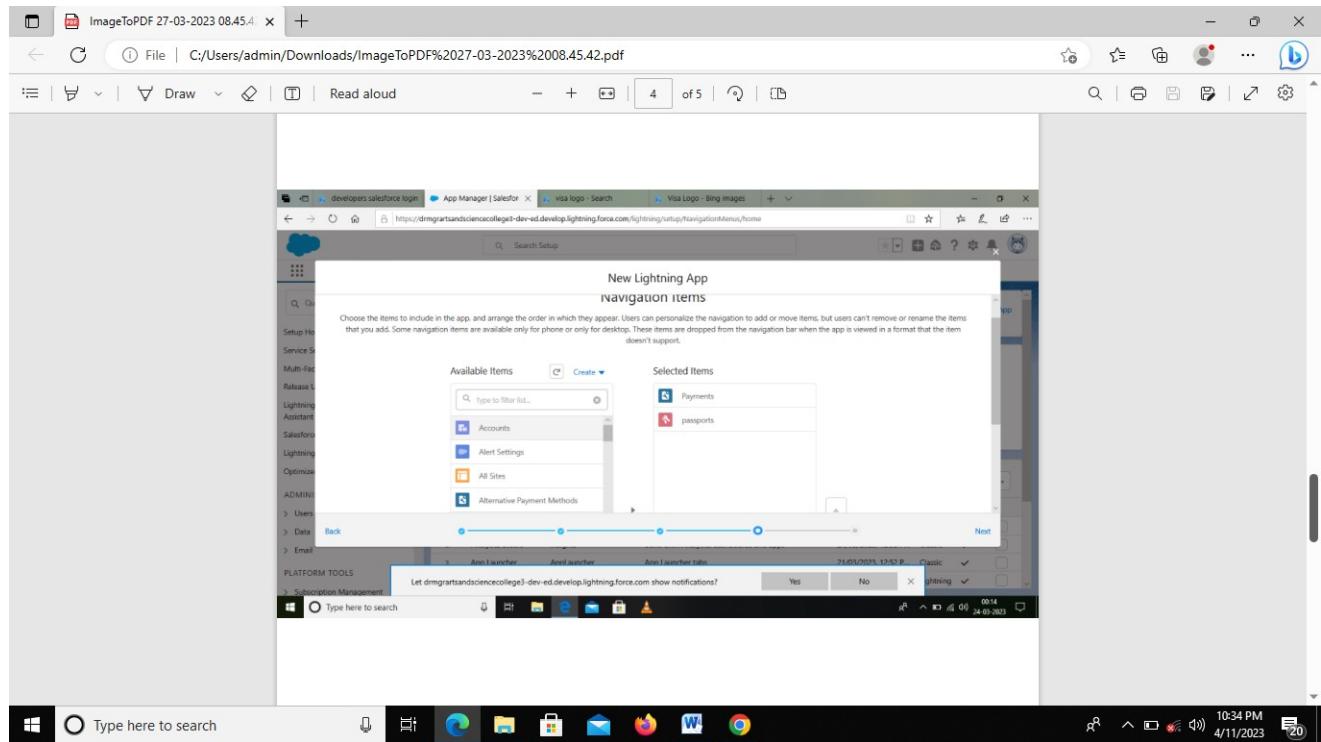
Milestone-4: App

Activity:

The screenshot shows a browser window with the URL <https://drmgrartsandsciencecollege3-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home>. The page title is "Lightning Experience App Manager". The left sidebar has a search bar and navigation links for "Setup", "Home", and "Object Manager". Under "Apps", "App Manager" is selected. A message says "Didn't find what you're looking for? Try using Global Search." The main content area is titled "Clone Apps(Beta)". It includes a note about cloning existing apps and a toggle switch for "Enable App Cloning" which is set to "Disabled". Below is a table listing 23 items, sorted by App Name. The columns are: App Name, Developer Name, Description, Last Modified, Type, and Visibility. The table shows various standard Salesforce apps like All Tabs, Analytics Studio, App Launcher, Bolt Solutions, and book my visa.

App Name ↑	Developer Name	Description	Last Modified ...	Type	Vi...
1 All Tabs	AllTabSet		21/03/2023, 12:52 pm	Classic	▼
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	21/03/2023, 12:52 pm	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	21/03/2023, 12:52 pm	Classic	✓
4 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your i...	21/03/2023, 12:54 pm	Lightning	✓
5 book my visa	book_my_visa		24/03/2023, 12:45 pm	Lightning	✓





Milestone-5: user Activity-1

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. The left sidebar includes links for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and a prominent 'Users' link. Below the sidebar, a search bar contains the text 'users'. The main content area is titled 'All Users' and displays a table of users. The table columns include Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed are:

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty@00d2w00000rpvcpea3.yep337vgfc@chatter.salesforce.com	Chatter Free User	<input checked="" type="checkbox"/>	
Edit	E_Gayathri	GE	gaya@mgr.com	System Administrator	<input checked="" type="checkbox"/>	
Edit	User_Integration	integ	integration@00d2w00000rpvcpea3.com	Analytics Cloud Integration User	<input checked="" type="checkbox"/>	
Edit	User_Security	sec	insightssecurity@00d2w00000rpvcpea3.com	Analytics Cloud Security User	<input checked="" type="checkbox"/>	
Edit	visa slots_visa slots	vvisa	gaya@261202@gmail.com	Cross Org Data Proxy User	<input checked="" type="checkbox"/>	

At the bottom of the page, there are links for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

The screenshot shows the 'User Detail' view for a user named 'Gayathri E'. The left sidebar is identical to the previous screenshot. The main content area shows the user's details in a grid format. The user's name is 'Gayathri E' and their email is 'gaya@mgr.com'. Other details include:

Name	Value	Role	Value
Name	Gayathri E	User License	Salesforce
Alias	GE	Profile	System Administrator
Email	gaya@261202@gmail.com	Active	<input checked="" type="checkbox"/>
Username	gaya@mgr.com	Marketing User	<input checked="" type="checkbox"/>
Nickname	User16793833418576387286	Offline User	<input checked="" type="checkbox"/>
Title	Dr. MGR arts and science college for women	Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input checked="" type="checkbox"/>
Address	IN	Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	View

At the top of the user detail view, there are links for 'User Profile Help for this Page' and 'User Profile Help for this Page' again. At the bottom of the page, there are links for 'Edit', 'Sharing', and 'Change Password'.

The screenshot shows the Salesforce Setup interface for managing users. The left sidebar has a 'Users' section selected under 'User Management Settings'. The main content area displays a table of user configuration settings:

Setting	Description	Status
Division	IN	<input checked="" type="checkbox"/>
Address		<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	<input type="checkbox"/>
Locale	English (India)	<input type="checkbox"/>
Language	English	<input type="checkbox"/>
Delegated Approver		<input type="checkbox"/>
Manager		<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	<input type="checkbox"/>
Federation ID		<input type="checkbox"/>
App Registration: One-Time Password Authenticator	[Connected] ⓘ	<input type="checkbox"/>
App Registration: Salesforce Authenticator	[Connected] ⓘ	<input type="checkbox"/>
Security Key (U2F or WebAuthn)	ⓘ	<input type="checkbox"/>
Lightning Login	[Enroll] ⓘ	<input type="checkbox"/>
Temporary Verification Code (Expires in 1 to 24 Hours)	[Generate] ⓘ	<input type="checkbox"/>
Service Cloud User	<input checked="" type="checkbox"/>	
Site.com Contributor User	<input type="checkbox"/>	
Site.com Publisher User	<input type="checkbox"/>	
WDC User	<input type="checkbox"/>	
Mobile Push Registrations	<input type="checkbox"/>	
Data.com User Type	<input type="checkbox"/>	
Accessibility Mode (Classic Only)	<input type="checkbox"/>	
Debug Mode	<input type="checkbox"/>	
High-Contrast Palette on Charts	<input type="checkbox"/>	
Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>	
Send Apex Warning Emails	<input type="checkbox"/>	
Salesforce CRM Content User	<input checked="" type="checkbox"/>	
Receive Salesforce CRM Content Email Alerts	<input checked="" type="checkbox"/>	
Receive Salesforce CRM Content Alerts as Daily Digest	<input checked="" type="checkbox"/>	
Make Setup My Default Landing Page	<input checked="" type="checkbox"/>	
Quick Access Menu	<input checked="" type="checkbox"/>	
Development Mode	<input type="checkbox"/>	
Show View State in Development	<input type="checkbox"/>	

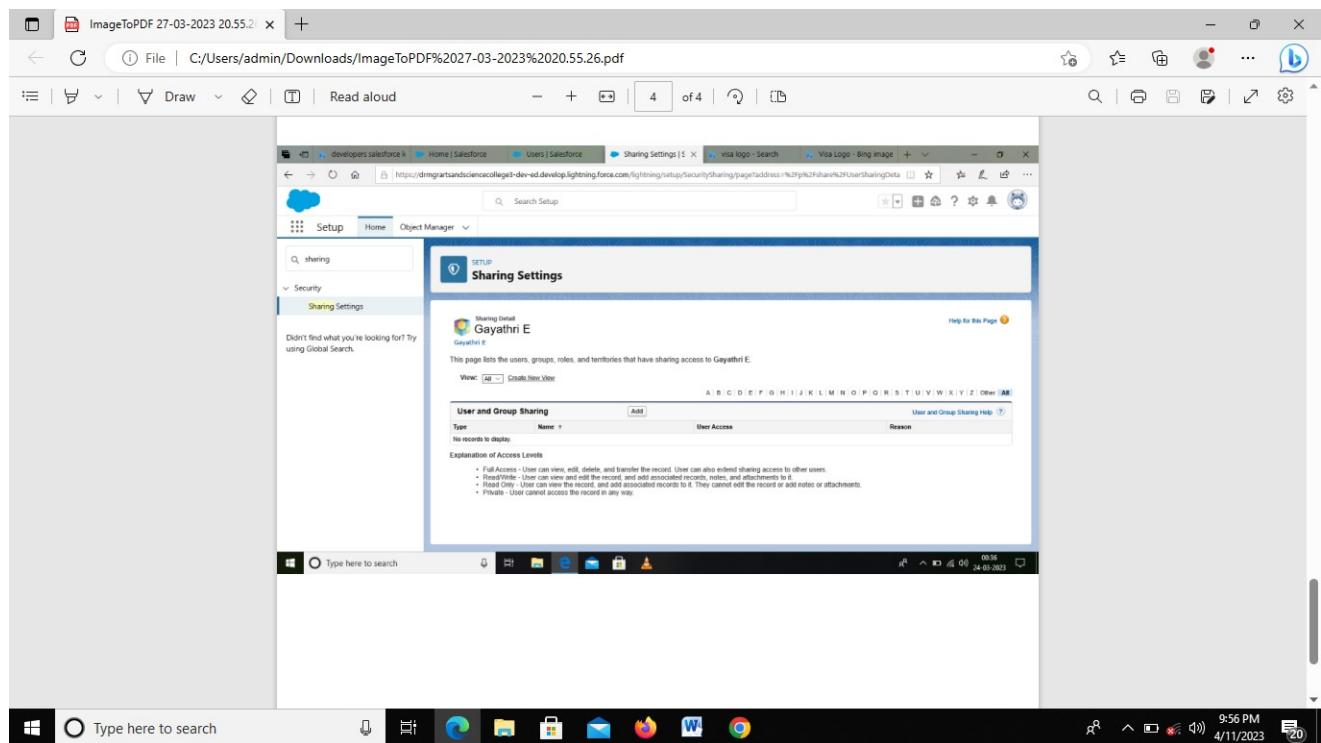
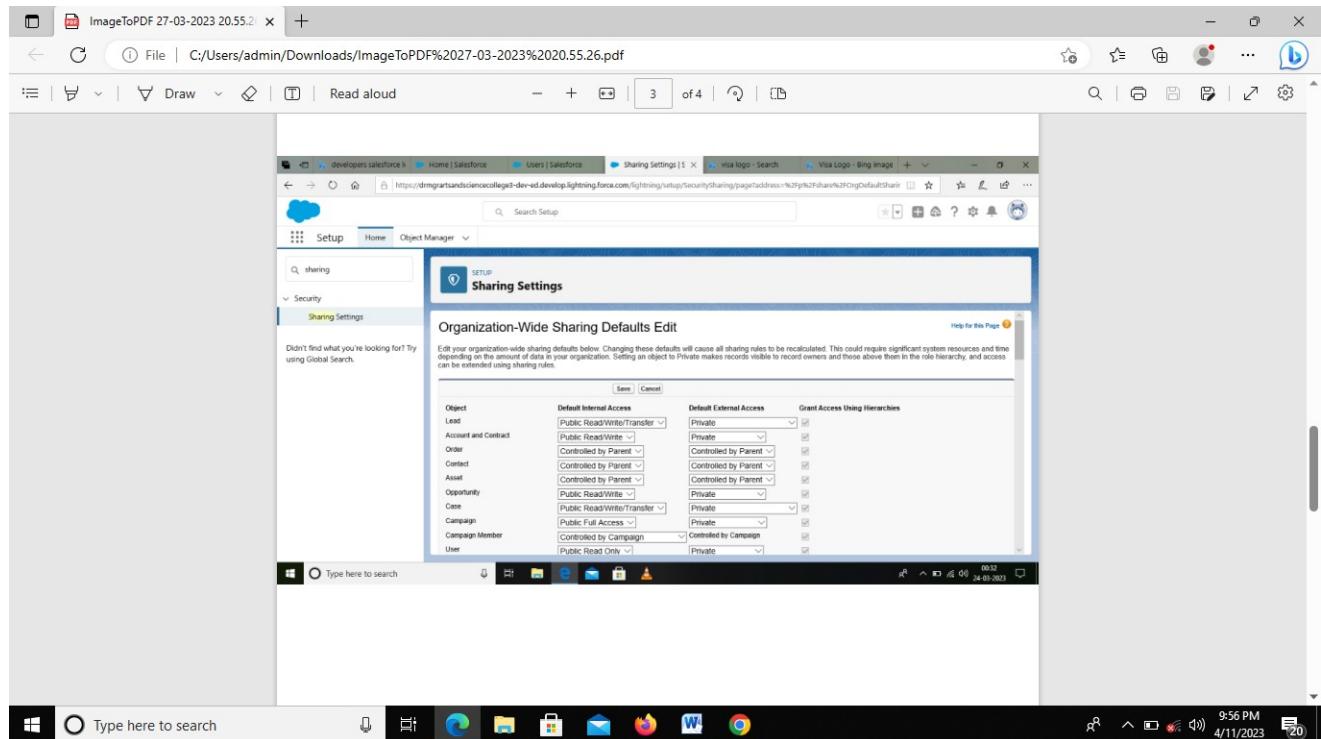
At the bottom of the page, there is a note: '(expires in 1 to 24 hours)'.

This screenshot shows the same Salesforce Setup interface for managing users, but with a different set of configuration items displayed in the table:

Setting	Description	Status
Alerts as Daily Digest	<input type="checkbox"/>	
Make Setup My Default Landing Page	<input checked="" type="checkbox"/>	
Quick Access Menu	<input checked="" type="checkbox"/>	
Development Mode	<input type="checkbox"/>	
Show View State in Development Mode	<input type="checkbox"/>	
Cache Diagnostics	<input type="checkbox"/>	
Allow Forecasting	<input checked="" type="checkbox"/>	
Call Center		
Phone Extension		
Fax		
Mobile	+91 6379580307 [Change]	
Email Encoding	Unicode (UTF-8)	
Employee Number		
Start of day	6:00 am	
End of day	11:00 pm	
Used Data Space	274 KB [View]	
Used File Space	164 KB [View]	
Last Login	11/04/2023, 9:05 am	
Last Password Change or Reset	11/04/2023, 9:05 am	
Failed Login Attempts	0 ⓘ	
Individual		

At the bottom of the page, there is a note: '(expires in 1 to 24 hours)'.

Activity-2



Milestone-6 Reports

Activity:1

The screenshot shows the Salesforce Lightning Home page. At the top, there is a navigation bar with links for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports (which is currently selected), Chatter, Groups, and More. Below the navigation bar is a search bar labeled "Search...". A sidebar on the left is titled "Reports" and contains sections for "Recent", "Created by Me", "Private Reports", "Public Reports", "All Reports", "Folders", "All Folders", "Created by Me", "Shared with Me", and "Favorites", "All Favorites". The main content area displays a table titled "Recent" with one item: "passport with visa locations" under "Report Name", "Private Reports" under "Folder", "Gayathri E" under "Created By", and "29/3/2023, 8:46 am" under "Created On". At the bottom of the page is a Windows taskbar with icons for File Explorer, Edge, File, Mail, and Task View, along with a search bar and system status indicators.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	passport with visa locations		Private Reports	Gayathri E	29/3/2023, 8:46 am	

Report Builder | Salesforce

https://drmgrartsandsciencecollege3-dev-ed.develop.lightning.force.com/lightning/r/Report/00O2w00000DDoTfEAL/edit?queryScope=userFold...

VISA book my visa passports * Report Builder

REPORT **Locations with passports with visa**

Groups

Location Name, passport ID, Total

No records returned. Try editing report filters:

- Show All locations.
- Edit other filters in the filter panel.

Details (0 Rows) Click an intersection in the table above to filter details.

Row Counts Detail Rows Grand Total Stacked Summaries Conditional Formatting

Type here to search

12:46 PM 4/4/2023

Report Builder | Salesforce

https://drmgrartsandsciencecollege3-dev-ed.develop.lightning.force.com/lightning/r/Report/00O2w00000DDoTfEAL/edit?queryScope=userFold...

VISA book my visa passports * Report Builder

REPORT **Locations with passports with visa**

Groups

Location Name, passport ID, Total

No records returned. Try editing report filters:

- Show All locations.
- Edit other filters in the filter panel.

Details (0 Rows) Click an intersection in the table above to filter details.

Row Counts Detail Rows Grand Total Stacked Summaries Conditional Formatting

Type here to search

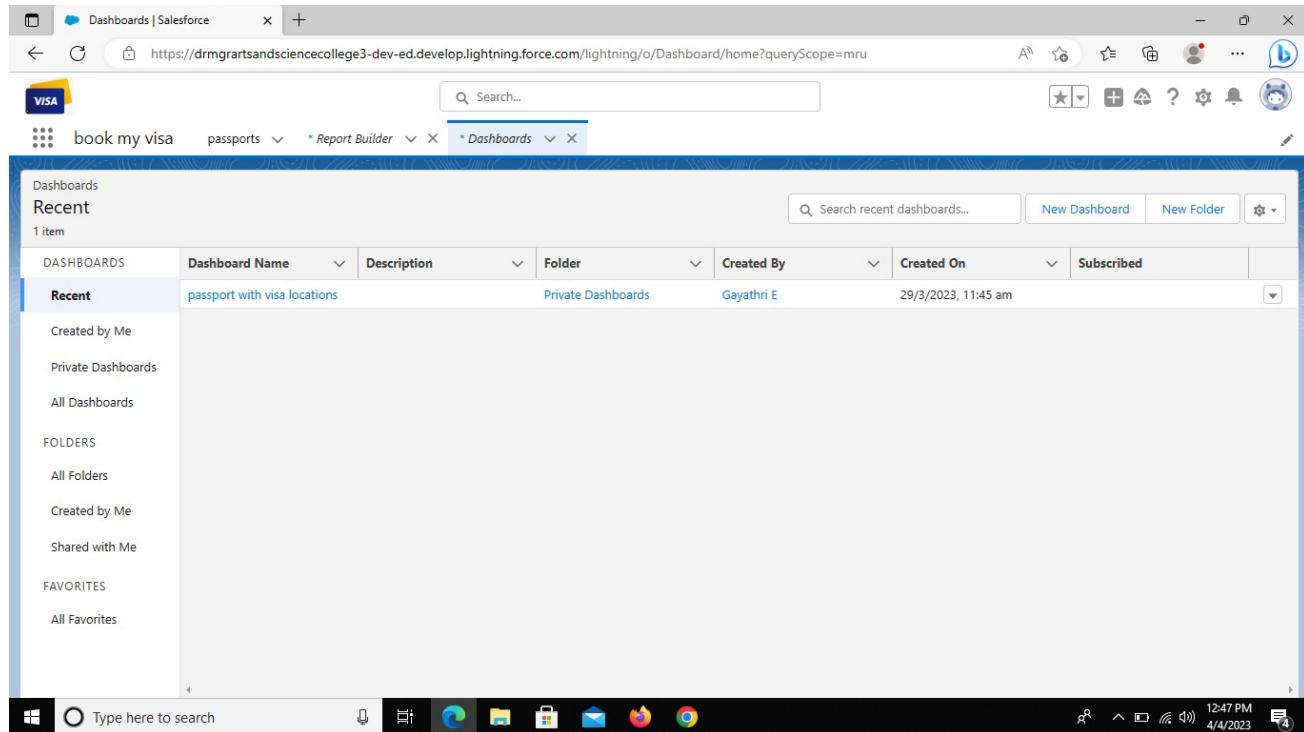
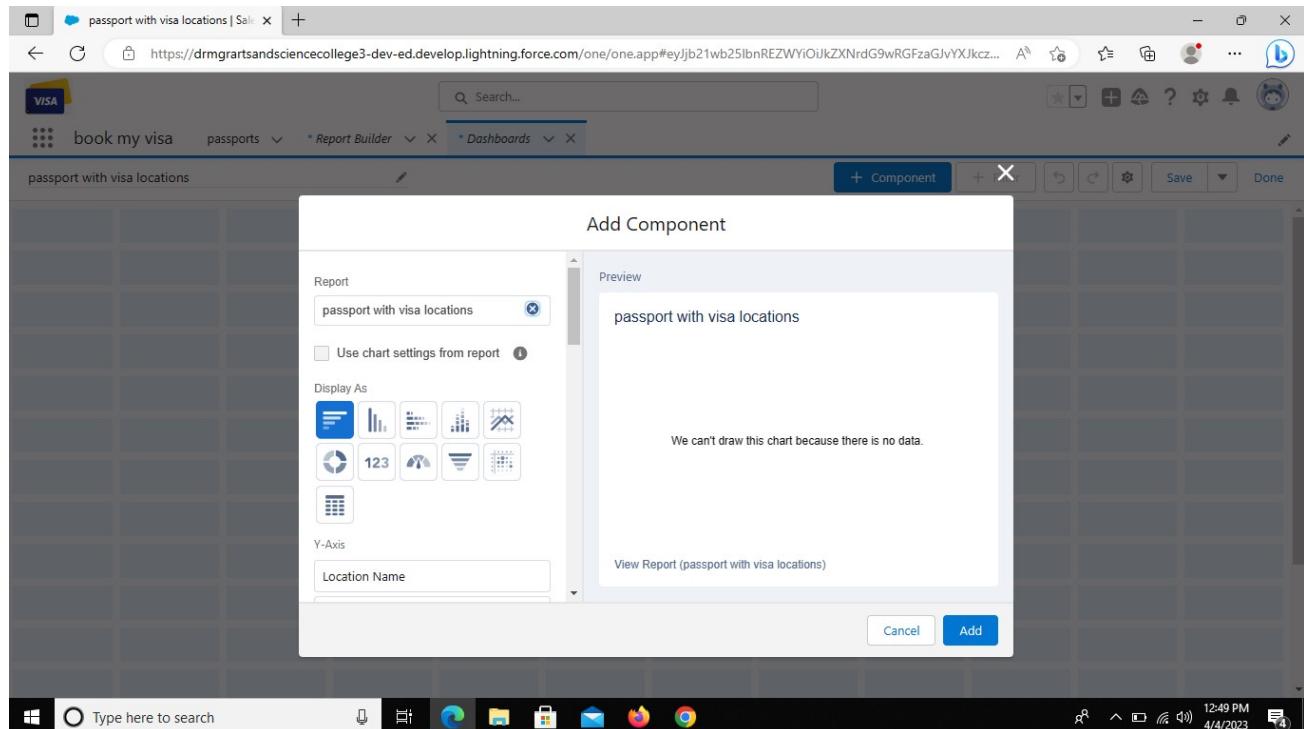
12:46 PM 4/4/2023

Milestone: 7 Dashboards

Activity:

The screenshot shows the Salesforce Report Builder interface. A modal window titled "Select Report" is open. On the left, there's a sidebar with categories: "Created by Me", "Private Reports", "Public Reports", and "All Reports". Below that is a section for "Folders" with categories: "Created by Me", "Shared with Me", and "All Folders". The main area lists reports under "Select Report": "passport with visa locations" (created by Gayathri E on 29-Mar-2023, 11:43 am) and "New Report" (created by Gayathri E on 05-Apr-2023, 11:28 am). At the bottom right of the modal are "Cancel" and "Select" buttons.

The screenshot shows the Salesforce Dashboard creation interface. A modal window titled "New Dashboard" is open. It has fields for "Name" (set to "passport with visa locations"), "Description" (empty), and "Folder" (set to "Private Dashboards"). At the bottom right of the modal are "Cancel" and "Create" buttons. The background shows the standard Salesforce dashboard grid and navigation bar.



4. Trailhead profile public URL

Team Lead – <https://trailblazer.me/id/gayae5>

Team Member 1-<https://trailblazer.me/id/vgayathri16>

Team Member 2- <https://trailblazer.me/id/gomag3>

Team Member 3-<https://trailblazer.me/id/geetha1810>

5. Advantages

- Data entry can be automated
- An efficient dashboard streamlines sales activities
- Potential to add revenue
- Allows for easier collaboration
- It allows for the consolidation of customer data and the basis for deep insights.
- It speeds up the sales conversion process.
- It increases staff productivity, lowering time-cost.
- It allows geographically dispersed teams to collaborate effectively.
- Improves customer experience by allowing personalisation and improved query resolution.

Disadvantages:

- CRM costs.
- One of the greatest challenges to CRM implementation is cost. ...
- Business culture. A lack of commitment or resistance to cultural change from people within the company can cause major difficulties with the CRM implementation. ...
- Poor communication. ...
- Lack of leadership.

Top Challenges in CRM Implementation

- Lack of Communication. ...
- Lack of Organization Wide Use. ...
- Lack of Technology Integration. ...
- Cost. ...
- Set Clear Objectives. ...
- Deployment Type. ...
- Training. ...
- Plan out Integration Needs in Advance.

.

6. Applications:

Basics

- Improved Informational Organization. ...
- CRM for Enhanced Communication. ...
- CRM Improves Your Customer Service. ...
- Automation of Everyday Tasks. ...
- Greater efficiency for multiple teams. ...
- Improved Analytical Data and Reporting.

7. Conclusion:

Despite the disadvantages listed above, there are plenty of benefits to using a crm system in your business. By choosing right crm system and taking the time to learn how to use it effectively, you can maximize the benefits that it has to offer.

These were the advantages and disadvantages of crm program and when analyzed the advantages and disadvantages, the advantages outweighs the disadvantages.

This means that ultimately a crm would be very benreficial for a business.

8. Future Scope

CRM is predicted to become more powerful to support customer first, not company first businesses. Bringing together disparate teams, data, and system integrations, the CRM of the future is set to be centralized and empowered by AI and mobile capabilities.

The scope of CRM includes a wide range of activities, from managing customer contact information to developing personalized marketing campaigns. In order to be effective, CRM must be tailored to the specific needs of each business. As such, the scope of CRM can vary greatly from one company to the next.

