

CRM APPLICATION THAT HELPS TO BOOK A VISA SLOT



Date	20.04.2023
Team ID	NM2023TMID02641
Project Name	CRM application that helps to book a visaslot
Team Leader	GOKILA VARTHINI. R
Team Member	1. MYTHILI .R 2. SATHYA.K 3. KAVIYA.V 4. DEVADHARSHINI. G

INTRODUCTION



1.1 OVERVIEW

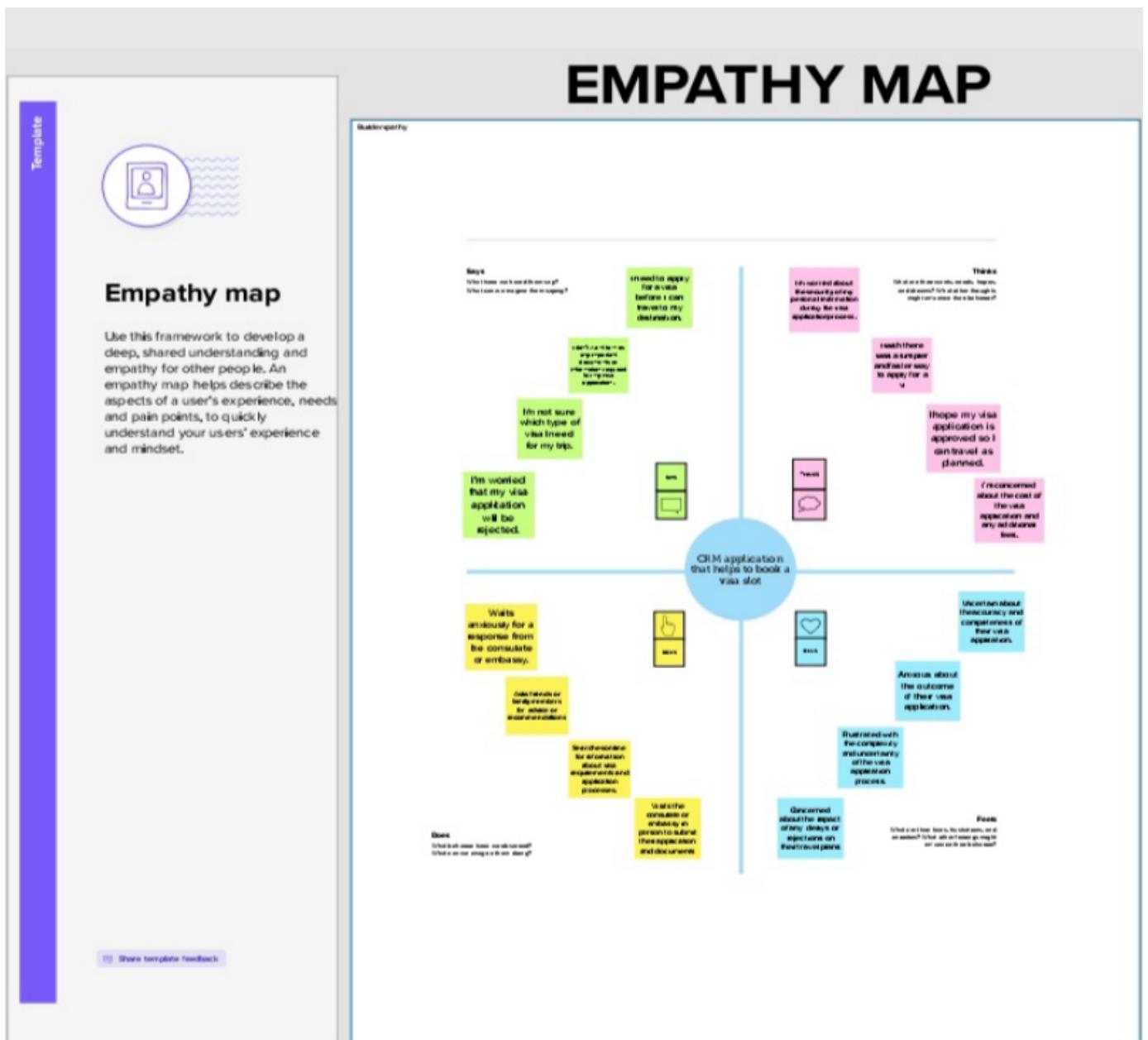
A visa slot management project is a system that is used to track and manage the availability of visa slots, which are appointments that are required for certain visa applications.

1.2 PURPOSE

The purpose of a CRM application that helps customers book a visa slot is to provide a convenient, efficient, and stress-free experience for customers applying for visas.

2. PROBLEM DEFINITION AND DESIGN THINKING

2.1 EMPATHY MAP



2.2 BRAINSTORMING



BRAINSTORM

1

Define your problem statement

PROBLEM

How to make the process more streamlined, efficient, and accessible to all applicants

2

Brainstorm

P1 Stage

- Establish a support network and set aside time for the application process.
- Help desk of questions

P2 Stage

- Establish a clear communication plan for the application process.
- Use a visual calendar.

P3 Stage

- Establish a support network and set aside time for the application process.
- Help desk of questions

Brainstormers

- Focus on the needs of the organization or its customers.
- Consider relevant past experiences.

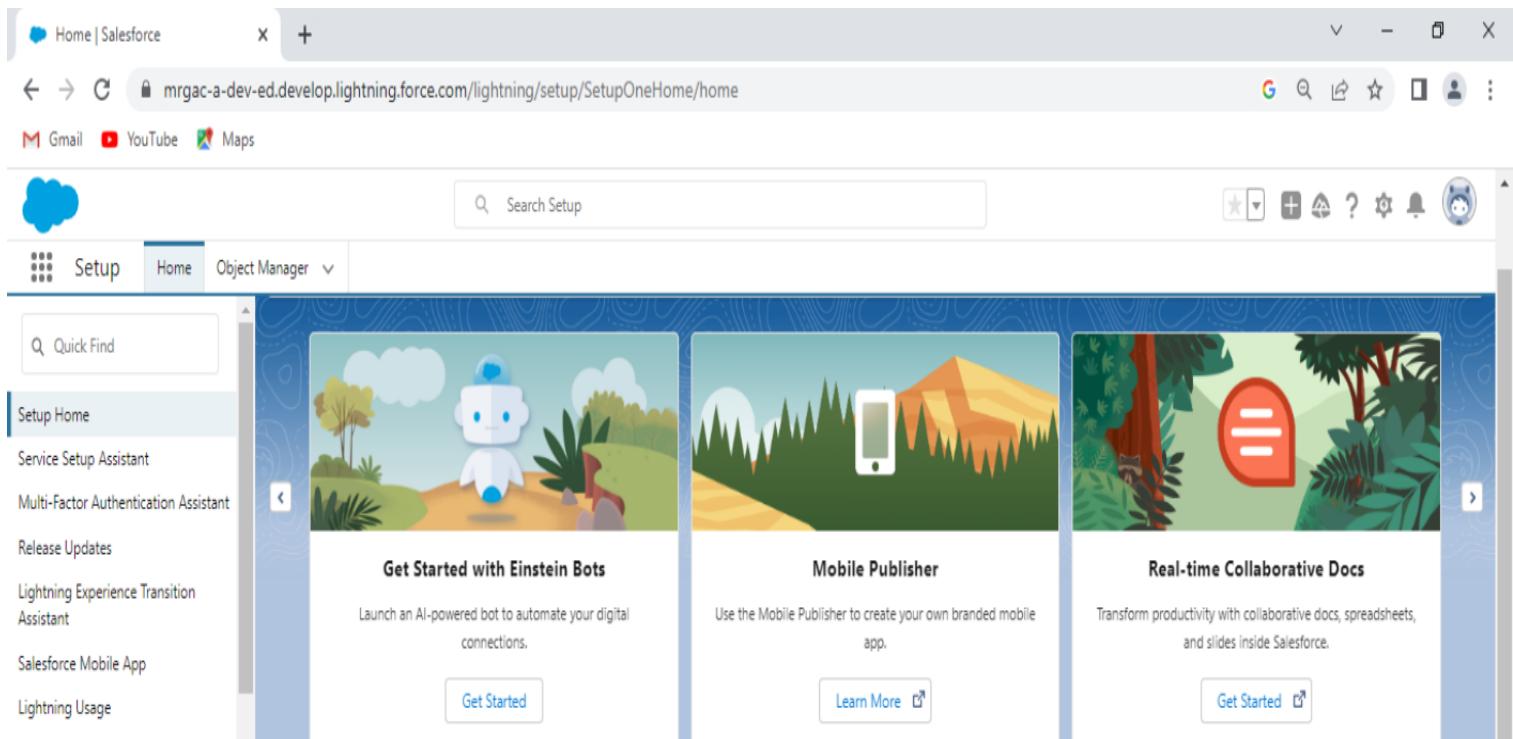
Champions

- Use research to support the implementation of the changes.
- Use a visual calendar.

DATA MODEL

S.NO	Field name	Data type
1.	Contact number	Number
2.	Full name	Text
3.	Passport number	Text
4.	Permanent address	Text

Milestone 1 : Creation of developer org



The screenshot shows the Salesforce Setup Home page. On the left, there's a sidebar with links like Quick Find, Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Administration (with sub-links for Users, Data, Email), Platform Tools (with sub-links for Subscription Management, Apps, Feature Settings), and Most Recently Used (listing 10 items: gokila varthini, passport number, visa slot). The main content area features three cards: "Get Started with Einstein Bots" (AI-powered bot for digital connections), "Mobile Publisher" (create branded mobile app), and "Real-time Collaborative Docs" (transform productivity with docs, spreadsheets, and slides). At the bottom, there's a search bar and a taskbar with icons for File, Home, Object Manager, and Help.

Setup Home | Salesforce

mrgac-a-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home

Gmail YouTube Maps

Search Setup

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

Users

Data

Email

Subscription Management

Apps

Feature Settings

Most Recently Used

NAME	TYPE	OBJECT
gokila varthini	User	
passport number	Custom Field Definition	visa slot
visa slot	Custom Object Definition	

Type here to search

File Home Object Manager Help

02:26 ENG 21-04-2023



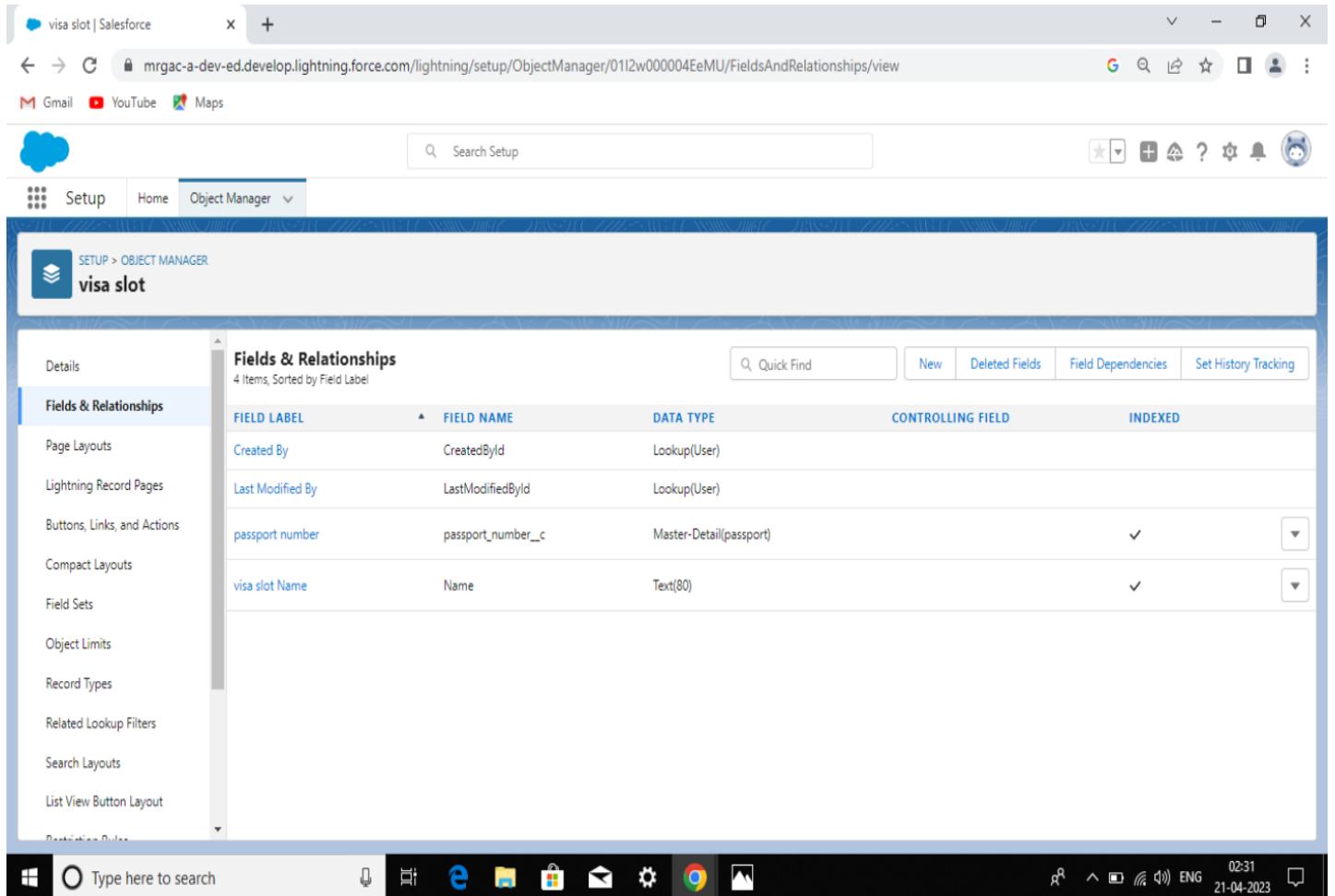
Milestone 2 : Object

The screenshot shows the Salesforce Object Manager interface. A new custom field named "passport number" has been created under the "visa slot" object. The field is of type "Text" and is set to "Required". It is also a "Field-Level Security" field. The "Master-Detail" relationship is defined with "visa_slots" as the master object and "visa_slot" as the detail object. The "Sharing Setting" is "ReadWrite". The "Object Name" is "visa_slot" and the "Data Type" is "Master-Detail". The "Created By" and "Modified By" fields show the user "opkilevarthini.rajumar" with the timestamp "17/04/2023, 5:45 pm".

Milestone 3 : Relationship between objects

The screenshot shows the Salesforce Object Manager interface for the "visa slot" object. In the "Details" tab, the "API Name" is set to "VISA_SLOT_C". The "Custom" checkbox is checked. The "Singular Label" is "visa Slot" and the "Plural Label" is "visa slots". Under the "Description" section, there are several checkboxes: "Enable Reports", "Track Activities", "Track Field History", "Deployment Status", and "Help Settings". The "Deployment Status" is set to "Deployed" and the "Help Settings" link points to "Standard salesforce.com Help Window".

Milestone 4



The screenshot shows the Salesforce Object Manager interface for the 'visa slot' object. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main content area displays the 'Fields & Relationships' section with the following data:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
passport number	passport_number__c	Master-Detail(passport)		✓
visa slot Name	Name	Text(80)		✓

The browser taskbar at the bottom shows the URL as mrgac-a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01Iw000004EeMU/FieldsAndRelationships/view. The system status bar indicates the date as 21-04-2023 and the time as 02:31.



Milestone 5 : User

Salesforce | mrgac-a-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Gmail YouTube Maps

Setup Home Object Manager

Search Setup

user

SETUP Users

All Users

On this page you can create, view, and manage users.

In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android

View: All Users | Edit | Create New View

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00d2w00000rknnyeah.cb1wx4c89ts@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Edit raijumar_gokilavarthini	rajkumar	gokila10@company.sandbox		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit User_Integration	integ	integration@00d2w00000rknnyeah.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	Edit User_Security	sec	insightssecurity@00d2w00000rknnyeah.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/>	Edit varthini_gokila	guard	gokilamantra@gmail.com		<input checked="" type="checkbox"/>	Cross Org Data Proxy User

New User | Reset Password(s) | Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z | Other | All

https://mrgac-a-dev-ed.develop.lightning.force.com/one/one.app#/setup/ManageUsers/home

Type here to search

02:41 21-04-2023

Sharing Settings | Salesforce | mrgac-a-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/home

Gmail YouTube Maps

Setup Home Object Manager

Search Setup

sharing setting

SETUP Sharing Settings

Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculations.

Manage sharing settings for: All Objects

Disable External Sharing Model

Default Sharing Settings

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Account and Contract	Public Read/Write	Private	<input checked="" type="checkbox"/>
Contact	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Order	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Asset	Controlled by Parent	Controlled by Parent	<input checked="" type="checkbox"/>
Opportunity	Public Read/Write	Private	<input checked="" type="checkbox"/>
Case	Public Read/Write/Transfer	Private	<input checked="" type="checkbox"/>
Campaign	Public Full Access	Private	<input checked="" type="checkbox"/>
Custom Object	Controlled by Campaign	Controlled by Campaign	<input checked="" type="checkbox"/>

Organization-Wide Defaults Help

https://mrgac-a-dev-ed.develop.lightning.force.com/one/one.app#/setup/SecuritySharing/home

Type here to search

02:43 21-04-2023



Milestone 6: Report

Salesforce Reports | mrgac-a-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

Gmail YouTube Maps

VISA book my visa Reports Dashboards

Search...

Recent 1 item

Search recent reports... New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New passports Report	crm application that helps to book a visa slot	Private Reports	gokilavarthini rajkumar	18/4/2023, 2:33 pm	

Created by Me
Private Reports
Public Reports
All Reports

FOLDERS
All Folders
Created by Me
Shared with Me

FAVORITES
All Favorites

Type here to search

02:47 21-04-2023

Milestone 7 : Dashboard

passport with visa location | Sales X +

mrgac-a-dev-ed.lightning.force.com/lightning/r/Dashboard/01Z2w000001BbhkEAC/view?queryScope=userFolders

Gmail YouTube Maps

VISA Search...

book my visa Reports Dashboards

Dashboard **passport with visa location**
crm application that helps to book a visa slot
As of 20-Apr-2023, 1:19 pm Viewing as gokilavarthini rajkumar

New passports Report
visa booking



0 (0%)
(0 to 33)

passport with
View Report (New passports Report)

Type here to search

02:49 21-04-2023

Trailhead Profile Public URL



TRAILHEAD

Team lead - <https://trailblazer.me/id/rgokila>

Team member 1 - <https://trailblazer.me/id/mramalingam16>

Team member 2 - <https://trailblazer.me/id/skrishnasamy20>

Team member 3 - <https://trailblazer.me/id/kveeraiany>

Team member 4 - <https://trailblazer.me/id/dgangatharan>



Advantages

- An efficient dashboard streamlines sales activities
- Potential to add revenue
- Allows for easier collaboration
- Enables automation of repetitive tasks

DISADVANTAGES

- Dependent on proper setup
- Focused on the wrong person
- Can be costly
- A waste of time if used incorrectly



APPLICATION

Tools like these can help leaders better understand their customers, identify trends and opportunities, and make data-driven decisions that improve their bottom line.

CONCLUSION

CRM systems are powerful tools that aid in enhancing customer relationships and driving business growth.

FUTURE SCOPE

The future of CRM is exciting and promising. With the emergence of new technologies, businesses can provide better customer experiences, gain customer loyalty, and increase their revenues.