

# **PROJECT REPORT TEMPLATE**

## **CRM APPLICATION THAT HELPS TO BOOK A VISA SLOT**

### **1. INTRODUCTION**

#### **1.1 OVERVIEW**

(i) 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 application.

(ii) It might be used by a government agency or a visa processing center To schedule and manage appointments with applicants.

(iii) The concept of customer relationship management (CRM) aims to streamline the approach of organizations toward their customers.

(iv) It includes documentation of customer data so that it can be used for information analysis, evaluation, and future planning.

(v) For immigration consultants, it is very important to maintain proper records of potential clients as well as existing customers.

(vi) Investing in a CRM system is undoubtedly very fruitful not just for small & medium sized organizations but for large ones as well.

#### **1.2 Purpose**

(i) Customer relationship management (CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers.

(ii) The goal is simple. Improve business relationships.

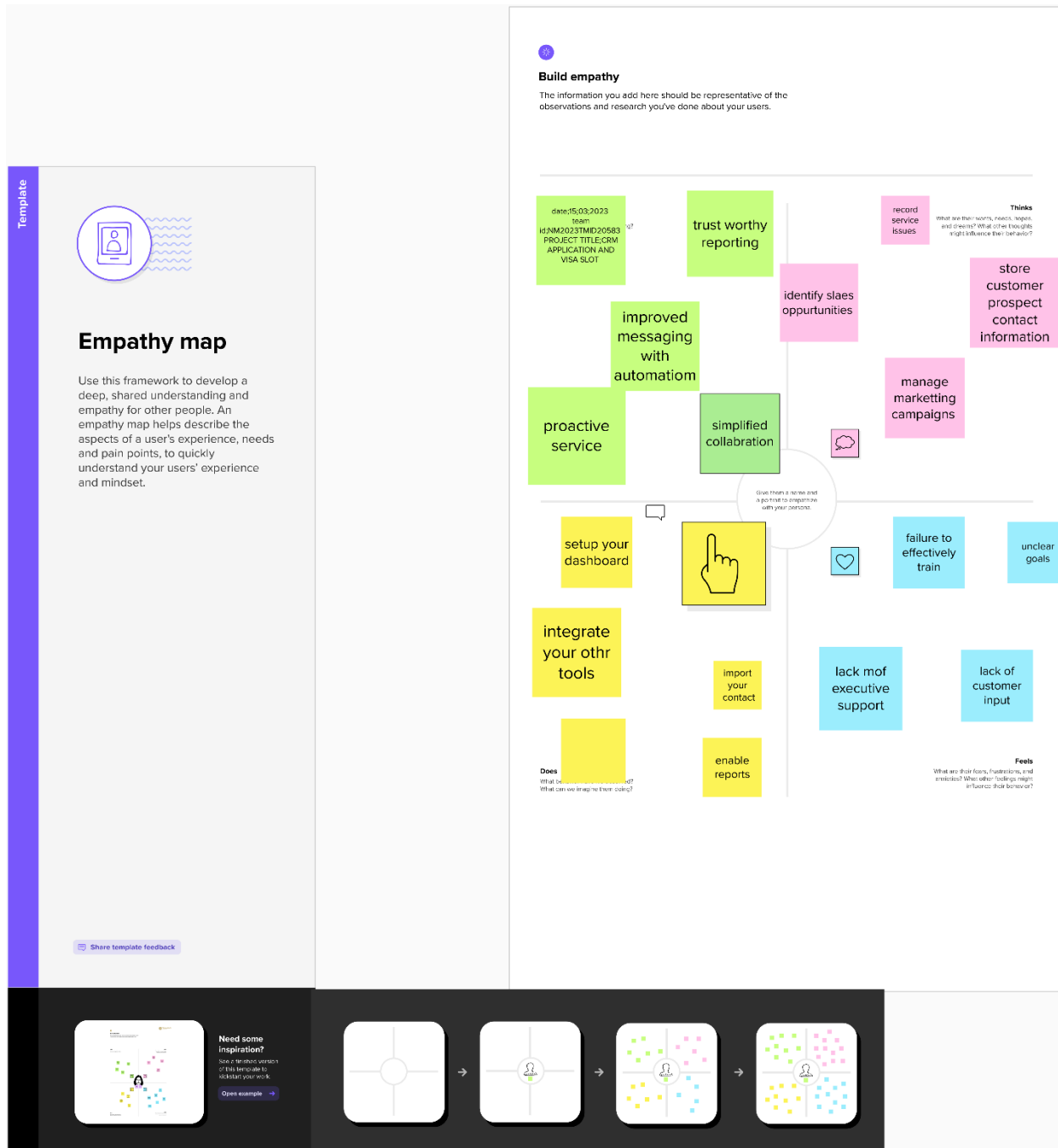
(iii) A CRM system helps companies stay connected to customers, streamline processes, and improve profitability.

(iv) with a CRM solution, the sales and marketing team can track and follow a customer's interaction journey with your business.

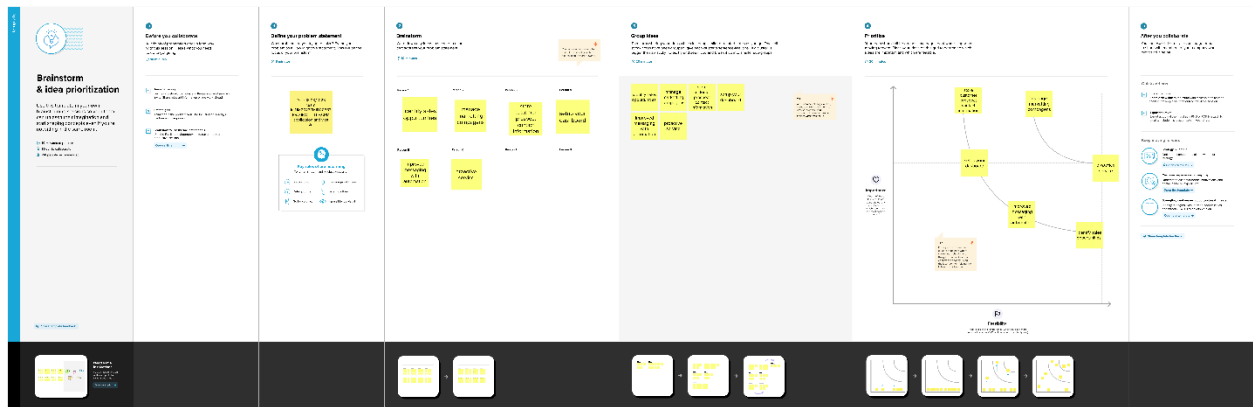
(v) This can enhance the customer journey and experience by refining each customer touchpoint.

## 2. Problem definition & Design thinking

### 2.1 Empathy Map



## 2.2 Ideation & Brainstorming Map



## 3. RESULT

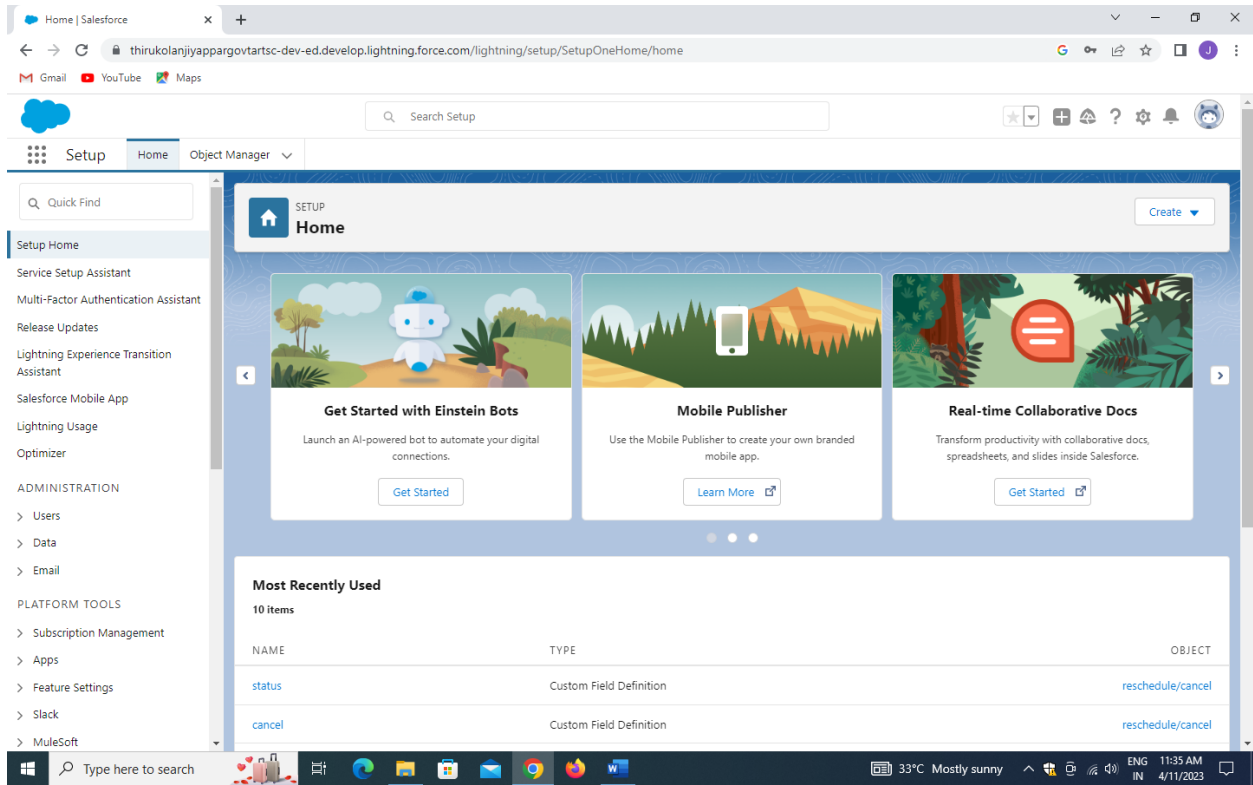
### 3.1 Data Model:

Object name	Fields in the object	
Passport	Field label	Data type
	Full name	Text
	Passport number	Text
	Contact number	Number
	Permanent address	Text
Visa slot	Field label	Data type
	location	Text
	time	Number
	Passport number	Text
	Visa slot number	Number
Payment	Field label	Data type
	Payment mode	Text
	Card number	Number
	Transaction id	Text
	Cancel transaction	Text
Reschedule	Visa slot number	Number
	Field label	Data type
	Passport number	Text
	Location	Text
	Time	Number
	cancel	Text
	Status	Text

## 3.2 Activity & Screenshot

### Milestone 1:

#### Activity 1:



### Milestone 2:

#### Activity 1:

Home | Salesforce passport | Salesforce

thirukolanjiyappargovartsc-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003wfEY/Details/view

Search Setup

Setup Home 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  
Restriction Rules  
Scoping Rules

Details

Description

API Name  
passport\_\_c  
Custom

Enable Reports  
✓  
Track Activities  
Track Field History

Singular Label  
passport  
Plural Label  
passports

Deployment Status  
Deployed  
Help Settings  
Standard salesforce.com Help Window

Edit Delete

Type here to search

33°C Mostly sunny

ENG IN 11:42 AM 4/11/2023

## Activity 2:

Home | Salesforce passport | Salesforce

thirukolanjiyappargovartsc-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003wfEY/FieldsAndRelationships/view

Search Setup

Setup Home 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  
Restriction Rules  
Scoping Rules

Fields & Relationships

8 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
82206780.01	contact_number__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
full name	full_name__c	Text(18)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User, Group)		✓
passport number	passport_number__c	Text(18)		
passport Number	Name	Text(80)		✓
permanent address	permanent_address__c	Text(18)		

https://thirukolanjiyappargovartsc-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/0112w000003wfEY/view

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## Milestone 3:

### Activity 1:

The screenshot shows the Salesforce Object Manager interface for the 'visa slot' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), 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, Restriction Rules, and Scoping Rules. The main content area is titled 'Fields & Relationships' and shows 7 items, sorted by Field Label. The table below lists the fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
location	location__c	Text(18)		
passport number	passport_number__c	Master-Detail(passport)		✓
time	time__c	Time		
visa slot Name	Name	Text(80)		✓
visa slot number	visa_slot_number__c	Text(18)		

The bottom of the image shows a Windows taskbar with the search bar, task icons, and system tray information: 33°C Mostly sunny, 11:56 AM, 4/11/2023.

## Milestone 4:

### Activity 1

Home | Salesforce

Home | Salesforce

Home | Salesforce

Home | Salesforce

App Manager | Salesforce

thirukolanjiyappargovartsc-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Gmail YouTube Maps

Search Setup

Setup Home Object Manager

app mana

Apps

App Manager

Didn't find what you're looking for?  
Try using Global Search.

SETUP

Lightning Experience App Manager

New Lightning App New Connected App

Clone Apps(Beta)

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the [Winter '23 release notes](#).

Enable App Cloning Disabled

22 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

	App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi...
1	All Tabs	AllTabSet		09/03/2023, 12:57 pm	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	09/03/2023, 12:57 pm	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	09/03/2023, 12:57 pm	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	09/03/2023, 12:59 pm	Lightning	✓
5	Book my Visa	Book_my_Visa		28/03/2023, 10:34 am	Lightning	✓
6	Community	Community	Salesforce CRM Communities	09/03/2023, 12:57 pm	Classic	✓
7	Content	Content	Salesforce CRM Content	09/03/2023, 12:57 pm	Classic	✓
8	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	09/03/2023, 12:57 pm	Lightning	✓

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Home | Salesforce

Home | Salesforce

Home | Salesforce

Home | Salesforce

App Manager | Salesforce

thirukolanjiyappargovartsc-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Gmail YouTube Maps

Search Setup

Setup Home Object Manager

app mana

Apps

App Manager

Didn't find what you're looking for?  
Try using Global Search.

Enable App Cloning Disabled

22 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

	App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi...
1	All Tabs	AllTabSet		09/03/2023, 12:57 pm	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	09/03/2023, 12:57 pm	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	09/03/2023, 12:57 pm	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	09/03/2023, 12:59 pm	Lightning	✓
5	Book my Visa	Book_my_Visa		28/03/2023, 10:34 am	Lightning	✓
6	Community	Community	Salesforce CRM Communities	09/03/2023, 12:57 pm	Classic	✓
7	Content	Content	Salesforce CRM Content	09/03/2023, 12:57 pm	Classic	✓
8	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	09/03/2023, 12:57 pm	Lightning	✓
9	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	09/03/2023, 12:57 pm	Lightning	✓
10	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	09/03/2023, 12:57 pm	Lightning	✓
11	Marketing	Marketing	Best-in-class on-demand marketing automation	09/03/2023, 12:57 pm	Classic	✓
12	Platform	Platform	The fundamental Lightning Platform	09/03/2023, 12:57 pm	Classic	
13	Queue Management	QueueManagement	Create and manage queues for your business.	09/03/2023, 12:57 pm	Lightning	✓
14	Sales	Sales	The world's most popular sales force automation (SFA) solution	09/03/2023, 12:57 pm	Classic	
15	Sales	LiohtninoSales	Manage your sales process with accounts, leads, opportunities, and more.	09/03/2023, 1:00 pm	Lightning	✓

Type here to search

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## Milestone 5:

### Activity 1:

The screenshot shows the Salesforce Setup interface for managing users. The left sidebar contains a navigation menu with options like Users, Permission Set Groups, Profiles, Public Groups, Queues, Roles, and User Management Settings. The main content area is titled 'All Users' and provides instructions on how to create, view, and manage users. It also mentions downloading SalesforceA for mobile devices. Below the instructions, there is a table listing existing users with columns for Action, Full Name, Alias, Username, Role, Active status, and Profile. The table includes five users: Chatter Expert, E. Janani, Janani E. Ms, User Integration, and User Security. Each user has an 'Edit' link and a checkbox for selection. At the bottom of the page, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

Home | Salesforce x Home | Salesforce x Home | Salesforce x Home | Salesforce x Home | Salesforce x Users | Salesforce x +

thirukolanjiyappargovartasc-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Gmail YouTube Maps

Search Setup

Setup Home Object Manager

user

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

User Interface

Action Link Templates

Actions & Recommendations

App Menu

Custom Labels

Density Settings

Global Actions

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

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter.00d2w0000rieoad.vp17ufn4kr0@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	E. Janani	js	jeanukudty@2002.com		✓	Standard User
<input type="checkbox"/> Edit	Janani E. Ms	MJana	janani@janbu.com		✓	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@00d2w0000rieoad.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d2w0000rieoad.com		✓	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

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### Activity 2:



Home | Salesforce x Home | Salesforce x Home | Salesforce x Home | Salesforce x Home | Salesforce x Home | Salesforce x Sharing Settings | 5 x

thirukolanjiyappargovartsc-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/home

Gmail YouTube Maps

Search Setup

Setup Home Object Manager

Q sharing

Security

Sharing Settings

Didn't find what you're looking for?  
Try using Global Search.

SETUP

Sharing Settings

Help for this Page

Manage sharing settings for: All Objects

Disable External Sharing Model

Default Sharing Settings

Organization-Wide Defaults

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓
Activity	Private	Private	✓

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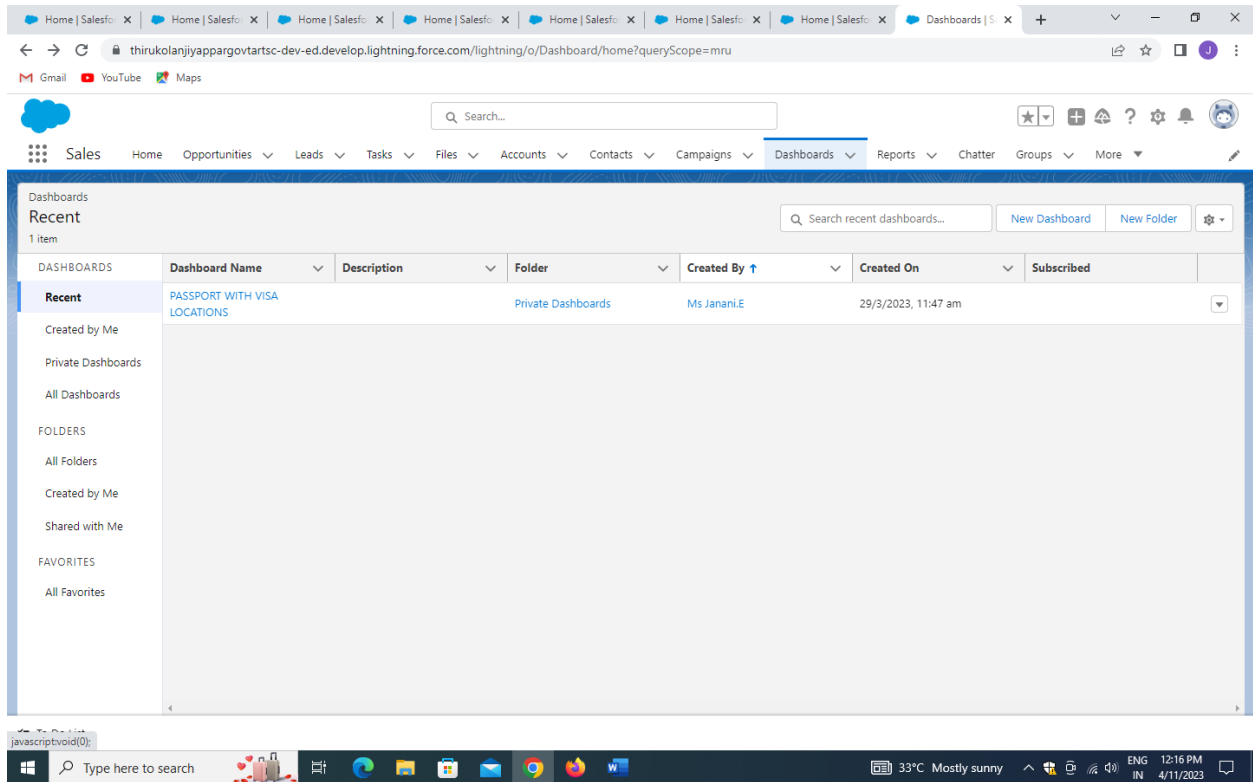
## Milestone 6:

### Activity1:

The screenshot displays the Salesforce Report Builder interface. The browser address bar shows a URL from a Salesforce development environment. The Salesforce navigation bar at the top includes the 'Reports' tab, which is currently active. The report being edited is titled 'New passports with visa slots Report' and is located under the 'passports with visa slots' category. The left sidebar contains the 'Outline' panel, which is divided into 'GROUP ROWS' (containing 'location') and 'GROUP COLUMNS' (containing 'passport: passport Number'). The 'Columns' section at the bottom of the sidebar shows 'visa slot: visa slot Name'. The main report area displays a message: 'No records returned. Try editing report filters: • Show All passports. • Edit other filters in the filter panel.' The bottom of the interface shows the 'To Do List' and the Windows taskbar with the date 4/11/2023.

## Milestone 7:

### Activity:



#### 4. Trailhead profile public URL

Team lead: Janani.E

<https://trailblazer.me/id/jelangovan3>

Team member 1: Jasmeen.H

<https://trailblazer.me/id/jasmh5>

Team member 2: Ezhilarasi.A

<https://trailblazer.me/id/ezhia3>

Team member 3: Kamsala.D

<https://trailblazer.me/id/ksala110>

Team member 4: Jeeva.E

<https://trailblazer.me/id/j2356>

Team member 5: Kalifulla.M

<https://trailblazer.me/id/kanas41>

## **5. Advantages & Disadvantages**

### **Advantages:**

- (i) Improved informational organizations.
- (ii) CRM for enhanced communication.
- (iii) CRM improves your customer service.
- (iv) Automation of every tasks.
- (v) Greater efficiency for multiple terms.
- (vi) Improved analytical data and reporting.

### **Disadvantages:**

- (i) CRM costs. one of the greatest challenges to CRM implementation is cost.
- (ii) Business culture. A lack of commitments or resistance to cultural change from people within the company can cause major difficulties with CRM implementation.
- (iii) Poor communication.
- (iv) Lack of leadership.

## **6. Applications**

(i) As customers have various products or services to choose from, it becomes challenging for businesses to position themselves in the market.

(ii) As a result, customers make their purchase decisions based on their experience with the business.

(iii) Hence, it becomes necessary for a company to offer an excellent customer experience (CX). For that, businesses require complete knowledge of customer data.

(iv) CRM systems collect necessary data from several sources such as email, websites, marketing campaigns, advertising campaigns, and physical stores.

(v) All these data are placed together to develop CRM solutions and enhance the customer experience.

## **7. Conclusion**

(i) The term Customer Relationship Management (CRM) describes systems and processes within companies which, with the help of customer data, aim to unify and improve customer service in order to achieve higher levels of customer loyalty.

(ii) Customer Relationship Management brings together various departments, such as sales and marketing, to ensure a uniform approach which ultimately contributes to increasing the company's success.

(iii) Unlike many other corporate guidelines, CRM focuses on the customer and customer relationships rather than on sales or profits.

(iv) This approach is particularly widespread in the business-to-business (B2B) area where it is often very difficult for companies to attract new customers.

(v) Although online marketing has made things much easier and opened up new solutions, business-to-business still remains a sector where it is difficult, and above all expensive, for any company to acquire fresh customers.

(vi) Customer relationship management is also used in the business-to-consumer area, though it plays a somewhat different role here because CRM for business customers is usually based on processes and solutions that are specifically tailored to individual customers.

## **8.Future scope**

(i) CRM is predicted to become more powerful to support customer first, not company first businesses.

(ii) 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.

(iii) Defining the scope of CRM projects means figuring out which areas of your business need to be included in the CRM implementation plan.

(iv) Before any CRM initiative begins, scoping is essential to establish what the effort will and will not cover, as well as to prevent feature creep and project bloating.