

CRM Application That Helps to Book a Visa Slot

1. 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.

Get your appointment booking calendar online and integrated with your CRM to deliver outstanding customer service for your appointment-based business. Let your clients and staff create, cancel, and reschedule appointments using your live and up to date online or private booking calendar system. Track all your customer contact info, appointments dates and details, payments, and much more using an integrated CRM.

A visa is a travel document that allows you to enter a foreign country for a specific period of time. In most cases, you have to apply for a visa before travelling, either at an embassy, consulate, or online. Sometimes you can also obtain a visa on arrival.

Miscommunication and lack of information transfer are two major time-wasters. When people take time self-learning to do things other team members already know how to do, or work on redundant tasks, you're losing a lot of hours per week. Collaborative CRM tools can streamline your teamwork by letting you build a knowledge base, establish best practice workflows, and allowing for frictionless communication between team members.

All nonimmigrant visa application fee (also known as the MRV fee) payments made on or after October 1, 2022, are valid for 365 days from the date a receipt is issued for payment of the MRV fee. Applicants must schedule an in-person or interview waiver appointment during this 365-day period.

If you are required to provide your biometric information as part of the visa application process you must attend at a visa application centre. When you have completed your on-line visa

application the summary sheet generated by the system will tell you how to book an appointment at a centre that is convenient for you.

A visa is a travel document that allows you to enter a foreign country for a specific period of time. In most cases, you have to apply for a visa before travelling, either at an embassy, consulate, or online. Sometimes you can also obtain a visa on arrival. Firstly, have looked at how agents work.

- Agents collect user credentials to book a visa slot.
- As soon as the visa slots are available, they book them and book for their other client

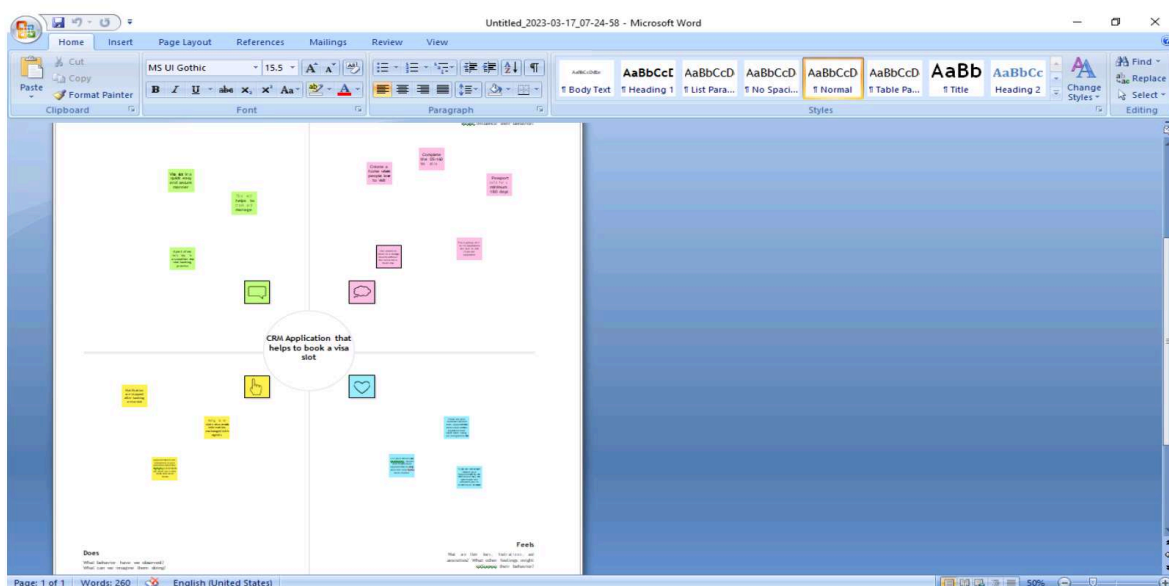
1.2 Purpose

You can book your US embassy visa appointment using your barcode and fee receipt. Once you are done with booking your US student visa appointment, you need to start with an F-1 visa slot booking for the VAC (biometrics: photograph + fingerprint) at least a day before the interview.

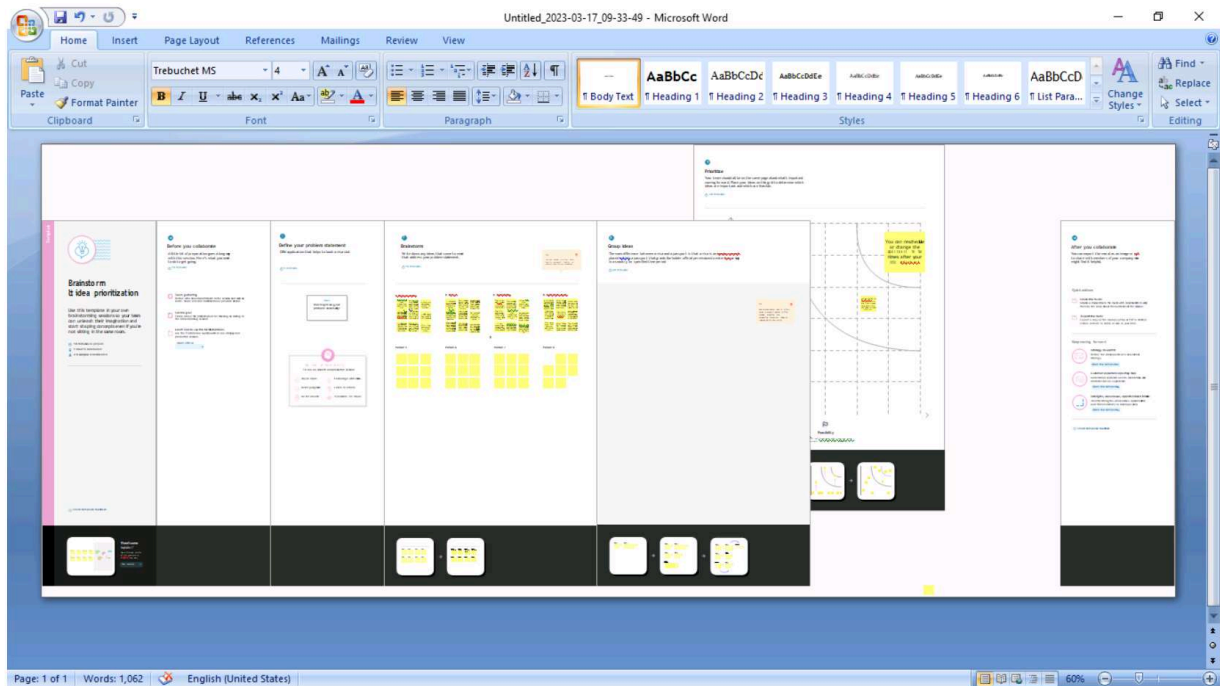
CRM Application that helps to book a Visa Slot. A visa slot management project is a system that is used to track and manage the availability of visa.

2. Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorming map screenshot



3. Result

3.1 Data Model:

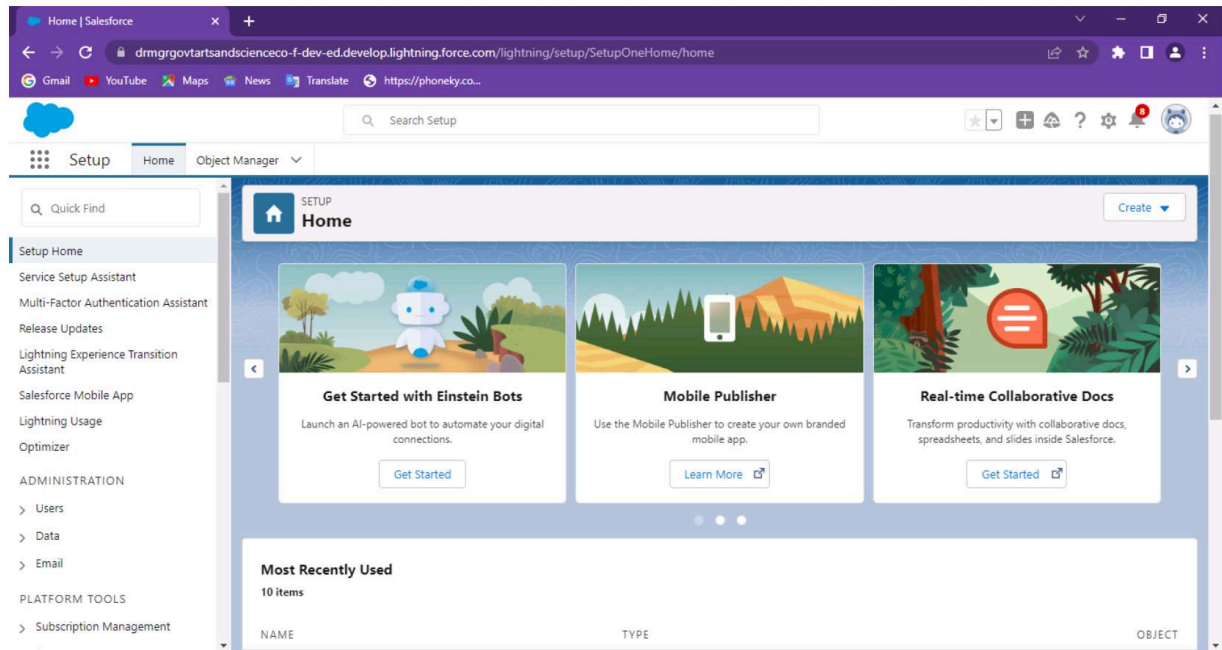
Object Name	Fields in the object	
Passport	Field label	Data type
	Passport	Text
	Contact Number	Number
	Full Name	Text
	Passport Number	Text

Visa slot	Visa slot	Master detail relationship
	Passport Number	Text
	Permanent Address	Text
Payment	Payment Mode	Master detail relationship
	Card Number	Location
	Transaction id(Auto number)	Number
Permanent address	Visa slot number	Master detail relationship
	Cancel Transaction	Cancel
	Visa slot number(Master)	Status

3.2 Activity & Screenshot

Milestone-1: Creation of developer org

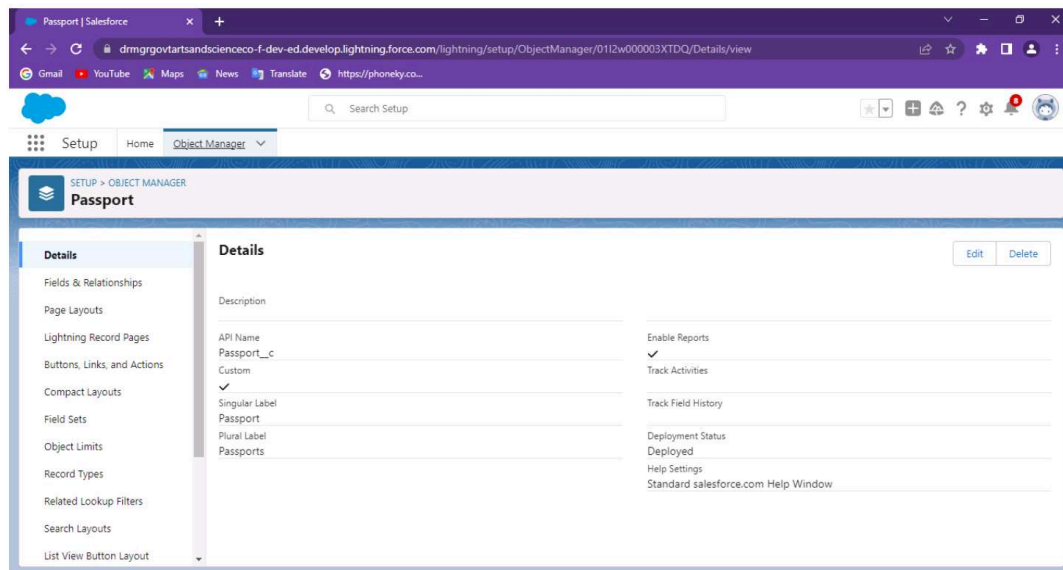
Activity-1: Creating Developer Account



Milestone-2: Objects:

Activity-1:

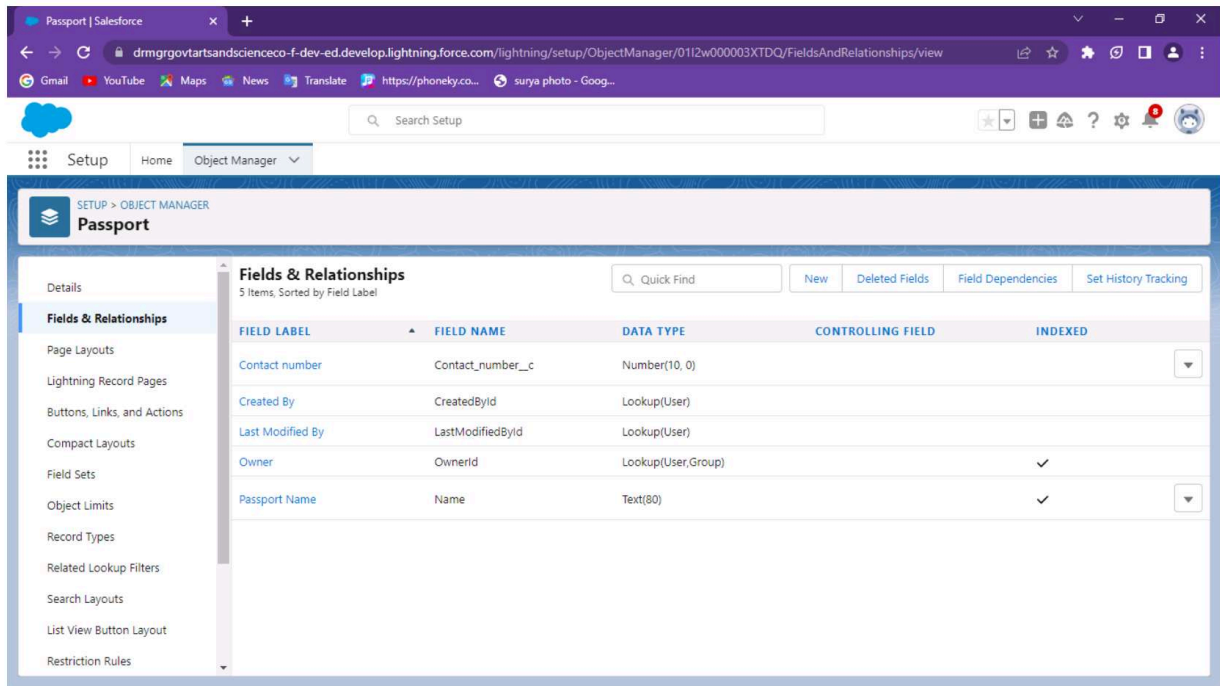
Creation of custom object:



Activity-2:

Fields available on custom object: Passport

Creation of fields on custom object: Passport

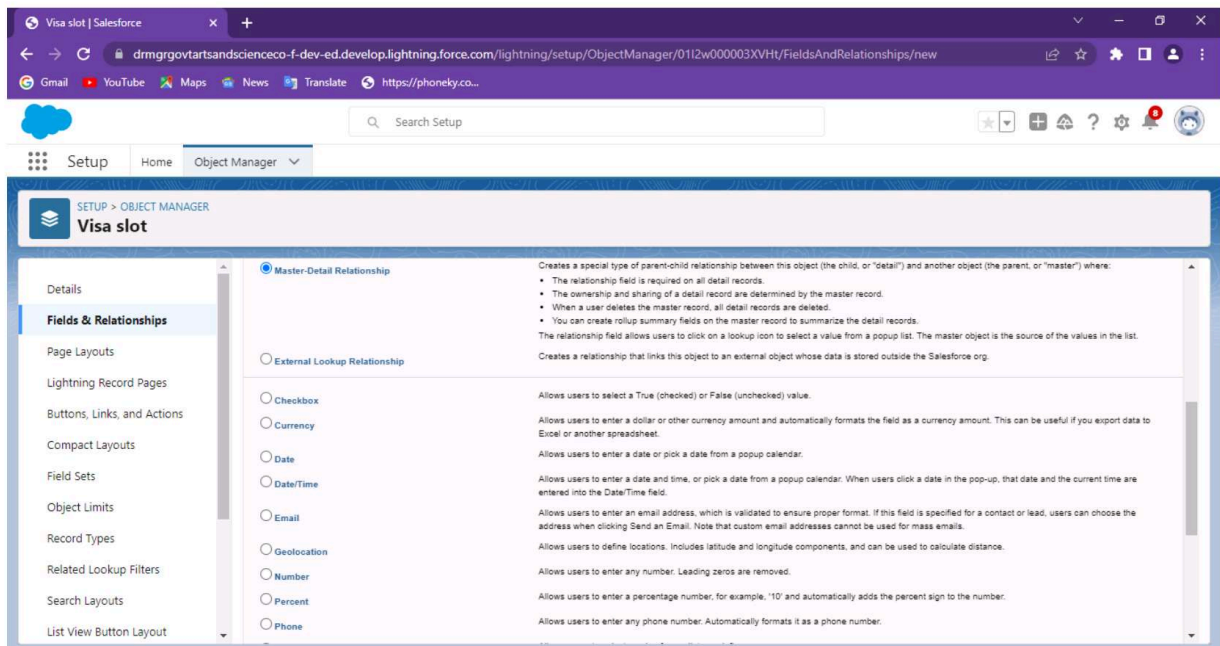


The screenshot shows the Salesforce Object Manager interface for the 'Passport' custom object. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main area displays a table of fields for the object.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Contact number	Contact_number__c	Number(10, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Passport Name	Name	Text(80)		✓

Milestone-3: Relationship B/w objects:

Activity-1: Creation of Relationship



The screenshot shows the Salesforce Object Manager interface for the 'Visa slot' custom object. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main area displays the 'Master-Detail Relationship' configuration page.

Master-Detail Relationship

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list. Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

External Lookup Relationship

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a popup calendar.

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

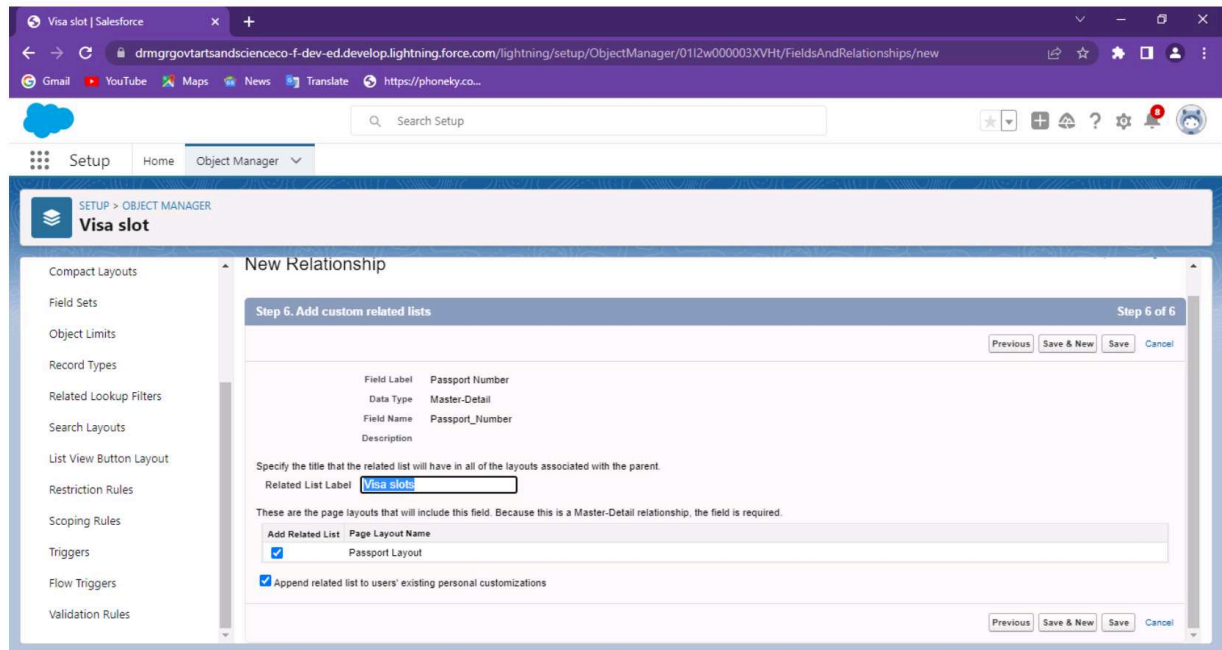
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

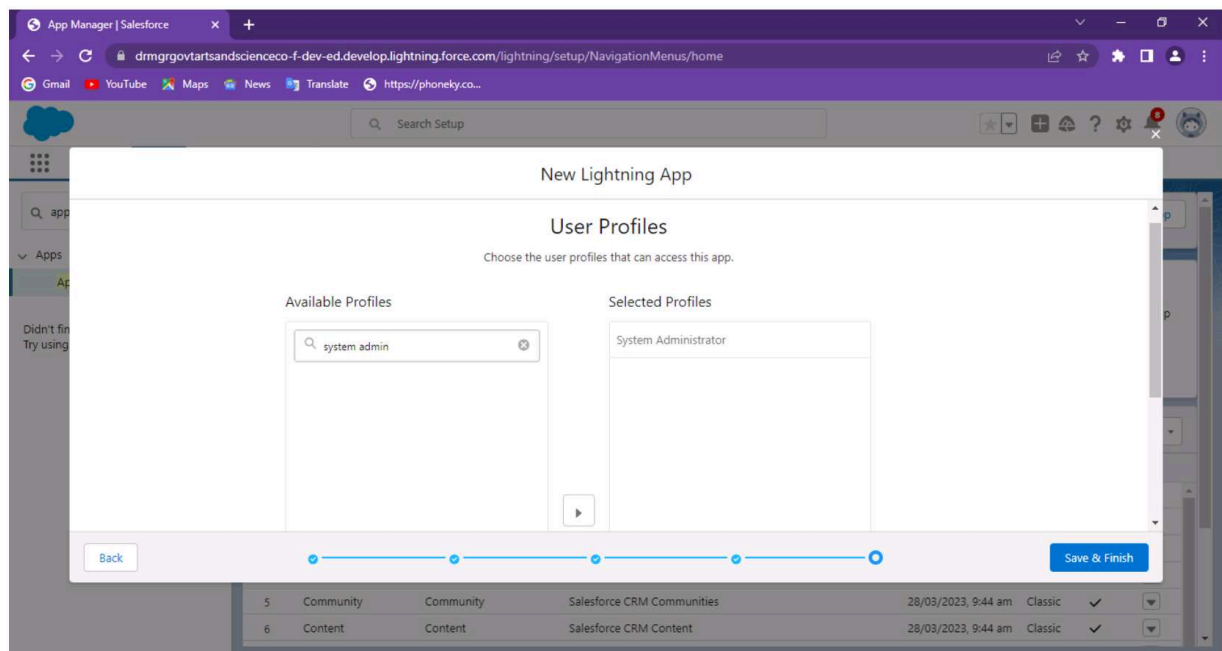
Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.



Milestone-4 App:

Activity: Creation of App



App Manager | Salesforce

Search Setup

Setup Home Object Manager

app man

Apps

App Manager

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

Lightning Experience App Manager

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		28/03/2023, 9:44 am	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	28/03/2023, 9:44 am	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	28/03/2023, 9:44 am	Classic	✓
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your i...	28/03/2023, 9:47 am	Lightning	✓
5	book my visa	book_my_visa		29/03/2023, 10:07 am	Lightning	✓
6	Community	Community	Salesforce CRM Communities	28/03/2023, 9:44 am	Classic	✓
7	Content	Content	Salesforce CRM Content	28/03/2023, 9:44 am	Classic	✓
8	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manag...	28/03/2023, 9:44 am	Lightning	✓
9	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	28/03/2023, 9:44 am	Lightning	✓

Milestone-5 User:

Activity-1: Creation of User

Users | Salesforce

Search Setup

Setup Home Object Manager

use

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

Process Automation

Paused And Failed Flow Interviews

User Interface

SETUP Users

Language English

Delegated Approver Manager

Receive Approval Request Emails Only if I am an approver

Federation ID

App Registration: One-Time Password Authenticator

App Registration: Salesforce Authenticator

Security Key (U2F or WebAuthn)

Lightning Login

Temporary Verification Code (Expires in 1 to 24 Hours) [Generate](#)

Accessibility Mode (Classic Only) ☐

Debug Mode ☐

High-Contrast Palette on Charts ☐

Load Lightning Pages While Scrolling ☒

Salesforce CRM Content User ☐

Receive Salesforce CRM Content Email Alerts ☐

Receive Salesforce CRM Content Alerts as Daily Digest ☐

Allow Forecasting ☐

Call Center

Phone

Extension

Fax

Mobile

Email Encoding Unicode (UTF-8)

Employee Number

Used Data Space 0 B [View](#)

Used File Space 0 B [View](#)

Last Login

Users | Salesforce

Search Setup

Setup Home Object Manager

use

Users

Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Process Automation
Paused And Failed Flow Interviews
User Interface

SETUP Users

User Edit Save Save & New Cancel

General Information

First Name: Divyakavitha
Last Name: G
Alias:
Email: kavi80658@gmail.com
Username: kavi80658@gmail.com
Nickname: User1680064805499577411
Title:
Company:
Department:
Division:
Role: <None Specified>
User License: Salesforce Platform
Profile: Standard Platform User
Active: ☒
Marketing User: ☐
Offline User: ☐
Knowledge User: ☐
Flow User: ☐
Service Cloud User: ☐
Site.com Contributor User: ☐
Site.com Publisher User: ☐
WDC User: ☐
Data.com User Type: --None--
Data.com Monthly Addition Limit: Default Limit (300)
Accessibility Mode (Classic): ☐

Activity-2:

OWD: organisation with default settings

Sharing Settings | Salesforce

Search Setup

Setup Home Object Manager

sharing

Security

Sharing Settings

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

SETUP Sharing Settings

Seller	Private	Private	<input checked="" type="checkbox"/>
Service Appointment	Public Read/Write	Private	<input checked="" type="checkbox"/>
Service Contract	Private	Private	<input checked="" type="checkbox"/>
Service Resource	Public Read/Write	Private	<input checked="" type="checkbox"/>
Service Territory	Public Read/Write	Private	<input checked="" type="checkbox"/>
Shift	Private	Private	<input checked="" type="checkbox"/>
Streaming Channel	Public Read/Write	Private	<input checked="" type="checkbox"/>
Web Cart Document	Private	Private	<input checked="" type="checkbox"/>
Work Order	Private	Private	<input checked="" type="checkbox"/>
Work Plan	Private	Private	<input checked="" type="checkbox"/>
Work Plan Template	Private	Private	<input checked="" type="checkbox"/>
Work Step Template	Private	Private	<input checked="" type="checkbox"/>
Work Type	Private	Private	<input checked="" type="checkbox"/>
Work Type Group	Public Read/Write	Private	<input checked="" type="checkbox"/>
Passport	Public Read/Write	Public Read/Write	<input checked="" type="checkbox"/>

Other Settings

Standard Report Visibility: ☒
Manual User Record Sharing: ☐
Manager Groups: ☐
Secure guest user record: ☐
Require permission to view record names in lookup fields: ☐

Milestone-6 Reports:

Activity-1: Creation of report

The screenshot shows the Salesforce Report Builder interface. The report is titled "New Passports with Visa slots Report" and is currently in "Preview" mode. The report is based on the "Passports with Visa slots" data source. The report structure is defined by the following fields:

- Groups:**
 - GROUP ROWS: Passport: ID
 - GROUP COLUMNS: Passport: Passport Name
- Columns:**
 - Visa slot: Visa slot Name

The report preview shows a message: "No records returned. Try editing report filters." Below this, there are links to "Show All passports" and "Edit other filters in the filter panel." The report is displayed in a table format with columns for "Passport: ID", "Passport: Passport Name", and "Total". The "Details" section shows 0 rows. The report is saved and can be run.

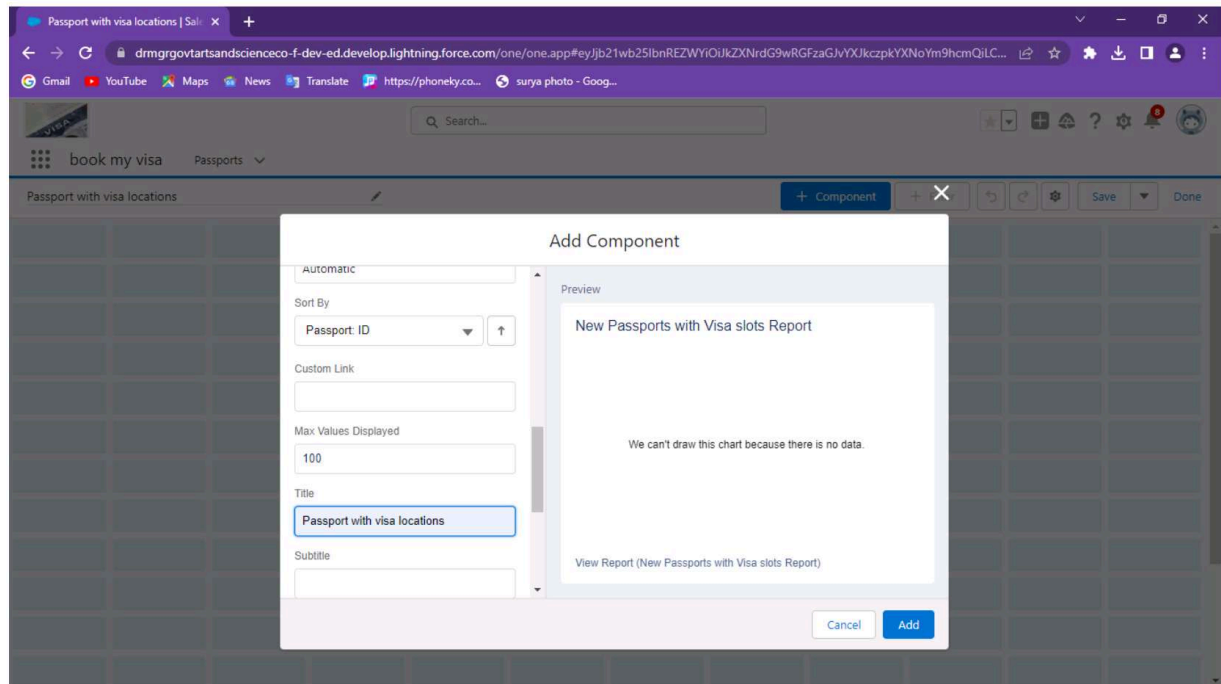
Milestone-7 Dashboards:

Activity: Creation of Dashboard

The screenshot shows the Salesforce Dashboard Builder interface. A "Add Component" dialog is open, allowing the user to add a new report component to the dashboard. The dialog has the following sections:

- Report:** A dropdown menu showing "New Passports with Visa slots Repo".
- Use chart settings from report:** A checkbox that is currently unchecked.
- Display As:** A section with various chart type icons (Bar, Line, Pie, etc.) and a "123" icon.
- Y-Axis:** A section with input fields for "Passport: ID" and "Passport: Passport Name".
- Preview:** A preview of the report component, showing the title "New Passports with Visa slots Report" and a message: "We can't draw this chart because there is no data." Below the preview is a link to "View Report (New Passports with Visa slots Report)".

The dialog has "Cancel" and "Add" buttons at the bottom right.



4. Trailhead Profile Public URL

Team Lead-<https://trailblazer.me/id/divyakavitha1234>

Team Member 1-<https://trailblazer.me/id/drajendiran1>

Team Member 2-<https://trailblazer.me/id/emohan16>

Team Member3-<https://trailblazer.me/id/ffemeena>

5. ADVANTAGES & DISADVANTAGE

International travel is no longer a luxury restricted to families or businesses with deep pockets. A large percentage of travellers, irrespective of background, are increasingly keen to explore foreign destinations and embark on at least one overseas visit per year. With visa services offered for 58 countries worldwide, VFS Global prides itself on being a household name among avid travellers. Retention and churn rates are extremely important determiners for a company's success; customer churn is a major obstacle to business growth. CRM tools like sentiment analysis, automated ticketing, and customer support and customer service automation can dramatically improve your retention by letting human agents defuse problems. Analytics

tools that look at customer life cycle can show you when churn happens and why, so you can identify and address pain points.

6. APPLICATIONS

Application 1: Tracking Customers

A good CRM helps you understand your market and the needs of your customers. As you attract more customers, a CRM makes two things clear: who is interested in what you have to offer, and what is most important to them.

When it comes to winning more customers, a CRM helps you make smarter decisions than your competition and offer people what they truly want. And if customers leave or your sales stagnate, you can see common threads and change the process accordingly, to better meet their needs and retain them. When you're working in spreadsheets and scrolling through email chains, it's hard to get a big picture of all the important data about current and future customers. A CRM saves important data in extensive customer and contact lists.

This makes it easy and efficient to market directly to them based on particular criteria

Improving Interactions and Communications

When your list of customers is short, it's easy to keep up with everyone. However, as your business grows and that list becomes longer, it's more likely that sales opportunities and current customers may fall through the cracks.

Application 4: Streamlining Internal Sales Processes

Because every salesperson operates differently, things can get inefficient quickly!

A good CRM helps you streamline your internal sales processes so that there is consistency and quality across your sales team. This is the secret to how companies can promise, and consistently deliver, great customer service – having one place where all the customer information lives, and the Process to back it up.

7. CONCLUSION

A visa appointment means scheduling a date and time for the interview at US Embassy or Consulate. Student visa aspirants are called for an interview to make sure that all the information on their application is correct. In the USA visa interview, students are asked a few basic questions to find out if they are eligible for the visa they want.

Advance travel planning and early visa application are important. If you plan to apply for a nonimmigrant visa to come to the United States as a temporary visitor, please review the current wait time for an interview using the tool below. *Not all visa applications can be completed on the day of the interview; please read the information below for more details.*

8. FUTURE SCOPE

Moreover, the companies didn't have the expertise to manage the CRM software inhouse. Hence, they were bound to hire designated technicians. These technicians used to charge a lump sum amount in exchange for their services. As a result, the cost used to be the most discouraging factor for small and medium enterprises. If we notice today's scenario, then the CRM software has become quite affordable. Even many developers are providing CRM software for free. Since most CRMs are web-based software, the up-gradation of infrastructure does not become necessary. Hence, it is a great way to save your expenses.

The CRM software gathers all customer-related information into a single place. Moreover, you can easily track customers across all platforms via the CRM system. Therefore, if you find any changes in their details or activities, then instantly update the same on your software. You can thereby minimize errors and save your time as well as effort for running your business.