

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

### **INTRODUCTION:**

#### **1.1 Overview:**

##### **Project Description:**

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.

#### **1.2 Purpose:**

It helps nurture relationships with customers for long-term sales. Although the underlying principle in CRM is not to squeeze out more profits but to make customers happy, which in turn results in product loyalty and more revenues for the business.

In this guide, you'll find more detailed answers on the fundamental aspects of CRM software. We'll discuss some of its most important benefits, potential issues you might face with the platform, and some best practices when implementing the software.

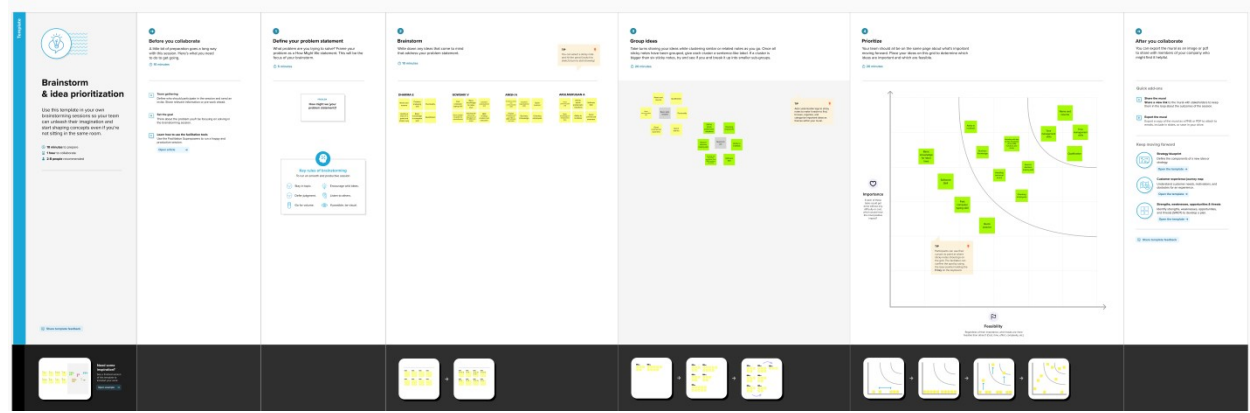
Towards the end, we'll provide a list of CRM products where we'll highlight different features and pricing details. There are also handy links to free trials so you can quickly get started on your CRM journey.

## Problem definition & Design Thinking:

### 2.1 Empathy Map:



## 2.2 Ideation & Brainstorming Map:



### Result:

OBJECT NAME	FIELD IN OBJECT	
	FILED LABLE	DATA TYPE
Passport	Contact Number	Number
	Full Name	Text
	Passport Number	Text
	Permanent Address	Text
Visa Slot	FILED LABLE	DATA TYPE
	Location	Text
	Time	Text
	Passport Number	Master
	Visa Slot Number	Number
Payment	FILED LABLE	DATA TYPE
	Payment Mode	Text
	Card Number	Number
	Transaction Id	AutoNumber
	Cancel Transaction	Text
	Visa Slot Number	Master
Reschedule/Canc el	FILED LABLE	DATA TYPE
	Passport number	Master
	Location	Text
	Time	Text
	Cancel	Text
	Status	Text

### 3.2 Activity & Screen Shorts:

The first screenshot shows a Gmail inbox with a verification email from Salesforce. The email content includes the Salesforce logo, a welcome message, a 'Verify Account' button, a URL to log in later, the username 'dharma@govartsandsciencecollege.com', and a final welcome message.

The second screenshot shows the Salesforce Setup page for a new custom object. The page is titled 'New Custom Object' and includes sections for 'Optional Features', 'Object Classification', 'Deployment Status', and 'Search Status'. The 'Optional Features' section has checkboxes for 'Allow Reports', 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Licensing'. The 'Object Classification' section has checkboxes for 'Allow Sharing', 'Allow Bulk API Access', and 'Allow Streaming API Access'. The 'Deployment Status' section has radio buttons for 'In Development' and 'Deployed'. The 'Search Status' section has a checkbox for 'Allow Search'.

Browser tabs: Welcome to Salesforce: Verify yo... Home | Salesforce Object Manager | Salesforce New Tab

Address bar: dharmacompanycoms-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Search Setup

Setup Home Object Manager

Object Manager

51+ Items, Sorted by Label

Quick Find Schema Builder Create

Custom Object Custom Object from Spreadsheet

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
Account	Account	Standard Object		
Activity	Activity	Standard Object		
Alternative Payment Method	AlternativePaymentMethod	Standard Object		
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object		
Appointment Invitation	AppointmentInvitation	Standard Object		
Appointment Invitee	AppointmentInvitee	Standard Object		
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object		
Asset	Asset	Standard Object		
Asset Action	AssetAction	Standard Object		
Asset Action Source	AssetActionSource	Standard Object		

https://dharmacompanycoms-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Browser tabs: Welcome to Salesforce: Verify yo... Home | Salesforce

Address bar: dharmacompanycoms-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home

Search Setup

Setup Home Object Manager

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

PLATFORM TOOLS

- > Subscription Management
- > Apps

Home

Create

Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

Get Started

Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Learn More

Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

Get Started

Most Recently Used

1 Items

NAME	TYPE	OBJECT
------	------	--------

Sign in to Gmail - Com x Platform Login Creden x - Student x Developer Edition Sign x Naanmudhalvan - Sm x Sign up for Google W x

developer.salesforce.com/signup

## Build enterprise-quality apps fast to bring your ideas to life

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First Name\* DHARMA Last Name\* E

Email\* dharmad2137a@gmail.com

Role\* Developer

Company\* GOVERNMENT ARTS AND SCIENCE COLLEGE

Country/Region\* India

Postal Code\* 607209

Username\* dharmad@company.comS

Welcome to Salesforce: Verify your account x Home | Salesforce x Passport | Salesforce x New Tab x

dharmadcompanycoms-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015i0000026BU4/FieldsAndRelationships/new

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

### New Custom Field

Step 2. Enter the details

Step 2 of 4

Previous Next Cancel

Error: Invalid Data. Review all error messages below to correct your data.

Field Label Full Name

Please enter the maximum length for a text field below.

Length 18

Error: You must enter a value

Field Name Full\_Name

Description

Help Text

Required ☐ Always require a value in this field in order to save a record



Windows taskbar and browser tabs are visible at the top. The browser address bar shows the URL: `dharmacompanycoms-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015i0000026BU4/FieldsAndRelationships/new`.

The Salesforce Setup page is displayed, with the left sidebar showing the navigation menu. The main content area is titled "New Custom Field" and shows "Step 2. Enter the details".

**Field Details:**

- Field Label:
- Length:  (Number of digits to the left of the decimal point)
- Decimal Places:  (Number of digits to the right of the decimal point)
- Field Name:
- Description:
- Help Text:

Buttons: Previous, Next, Cancel

The browser address bar shows the URL: `dharmacompanycoms-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F011%2Fe%3FretURL%3D%2Fsetup%2Fobject%2Fmanager`.

The Salesforce Setup page is displayed, with the left sidebar showing the navigation menu. The main content area is titled "Object Manager" and shows the "Enter Record Name Label and Format" section.

**Object Manager Settings:**

- Context-Sensitive Help Setting: ☒ Open the standard Salesforce.com Help & Training window
- Content Name:

**Enter Record Name Label and Format:**

- Record Name:  Example: Account Name
- Data Type:
- Display Format:  Example: A-{0000} [What Is This?](#)
- Starting Number:

**Optional Features:**

- ☒ Allow Reports
- ☐ Allow Activities
- ☐ Track Field History
- ☐ Allow in Chatter Groups

Windows browser window showing the Salesforce Setup page for creating a new custom object. The browser tabs include "Welcome to Salesforce: Verify your identity", "Home | Salesforce", "New Custom Object | Salesforce", and "New Tab". The address bar shows the URL: `dharmacompanycoms-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new`.

The Salesforce Setup navigation bar shows "Setup", "Home", and "Object Manager". The main header displays "New Custom Object". A message states: "Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)".

The "Custom Object Definition Edit" section includes "Custom Object Information" with the following fields:

- Label:** Passport (Example: Account)
- Plural Label:** Passports (Example: Accounts)
- Starts with vowel sound:** ☐
- Object Name:** Passport (Example: Account)
- Description:** (Empty text area)

Buttons at the top right of the form are "Save", "Save & New", and "Cancel". A red indicator shows "Required Information".

The Windows taskbar at the bottom shows the search bar and various application icons. The system tray displays "ENG IN" and the time "8:37 PM 4/10/2023".

Windows browser window showing the Salesforce Setup page for creating a new custom field for the "Passport" object. The browser tabs include "Welcome to Salesforce: Verify your identity", "Home | Salesforce", "Passport | Salesforce", and "New Tab". The address bar shows the URL: `dharmacompanycoms-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015i0000026BU4/FieldsAndRelationships/new`.

The Salesforce Setup navigation bar shows "Setup", "Home", and "Object Manager". The main header displays "Passport". A left sidebar lists navigation 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", and "List View Button Layout".

The main content area is titled "New Custom Field" and shows "Step 2. Enter the details" (Step 2 of 4). The form includes the following fields:

- Field Label:** Permanent Address
- Length:** 18 (with a note: "Please enter the maximum length for a text field below.")
- Field Name:** Permanent\_Address
- Description:** (Empty text area)
- Help Text:** (Empty text area)
- Required:** ☐ Always require a value in this field in order to save a record
- Unique:** ☐ Do not allow duplicate values
- ☒ Treat "ABC" and "abc" as duplicate values (case insensitive)

Buttons at the top right of the form are "Previous", "Next", and "Cancel".

The Windows taskbar at the bottom shows the search bar and various application icons. The system tray displays "ENG IN" and the time "8:56 PM 4/10/2023".



Browser tabs: Welcome to Salesforce: Verify yo... Home | Salesforce Passport | Salesforce New Tab

Address bar: dharmacompanycoms-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015i0000026BU4/Details/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Passport**

**Details** Edit Delete

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

Enable Reports  
✓

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

Windows taskbar: Type here to search, Taskbar icons, System tray: ENG IN 8:41 PM 4/10/2023

Browser tabs: Welcome to Salesforce: Verify yo... Home | Salesforce Passport | Salesforce New Tab

Address bar: dharmacompanycoms-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015i0000026BU4/FieldsAndRelationships/new

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Passport**

**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

**New Custom Field** Help for this Page

Step 2. Enter the details Step 2 of 4 Previous Next Cancel

Field Label passport Number ⓘ

Please enter the maximum length for a text field below.

Length 18

Field Name passport\_Number ⓘ

Description

Help Text ⓘ

Required ☐ Always require a value in this field in order to save a record

Unique ☐ Do not allow duplicate values

☒ Treat "ABC" and "abc" as duplicate values (case insensitive)

Windows taskbar: Type here to search, Taskbar icons, System tray: ENG IN 8:54 PM 4/10/2023

Trailblazer.me profile for Dharma E, Govt arts and science college, Tamil Nadu, India. The profile includes a bio section with a link to trailblazer.me/id/dhare20 and an "Add Hire Me Button". The Trailhead section shows 37 Badges, 3,175 Points, and 2 Trails, with a goal to reach the Adventurer rank by earning 5,825 more points.

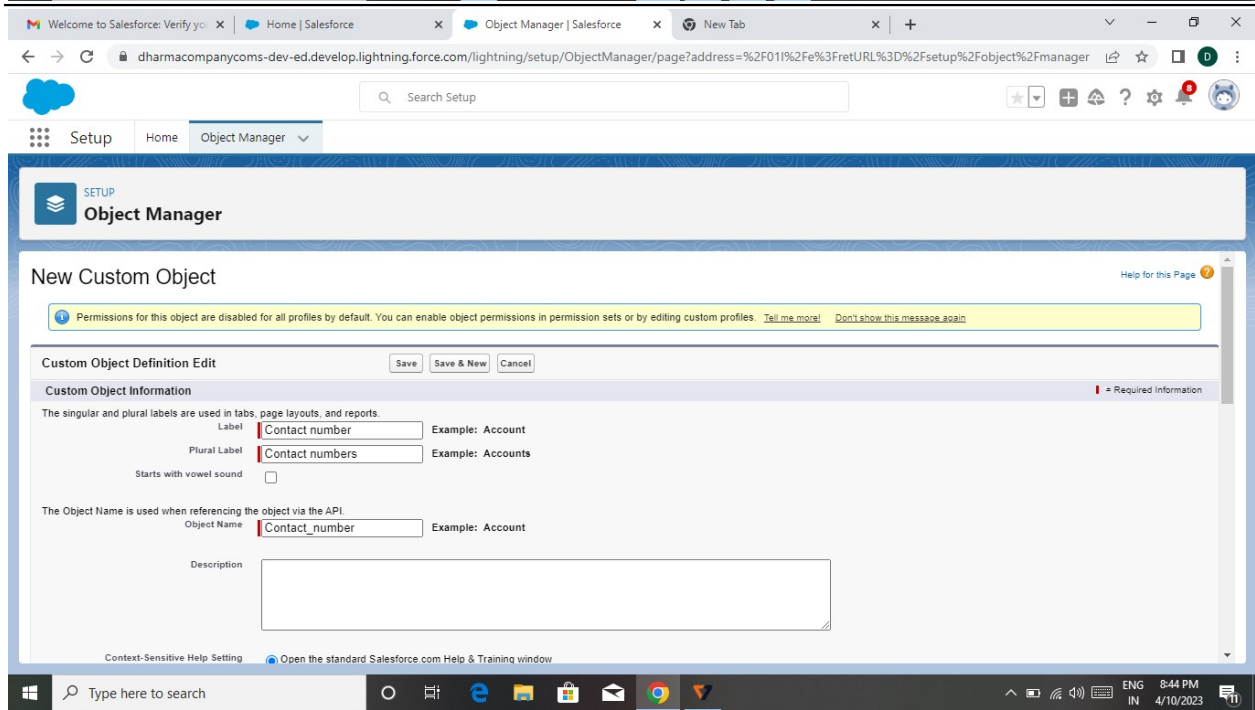
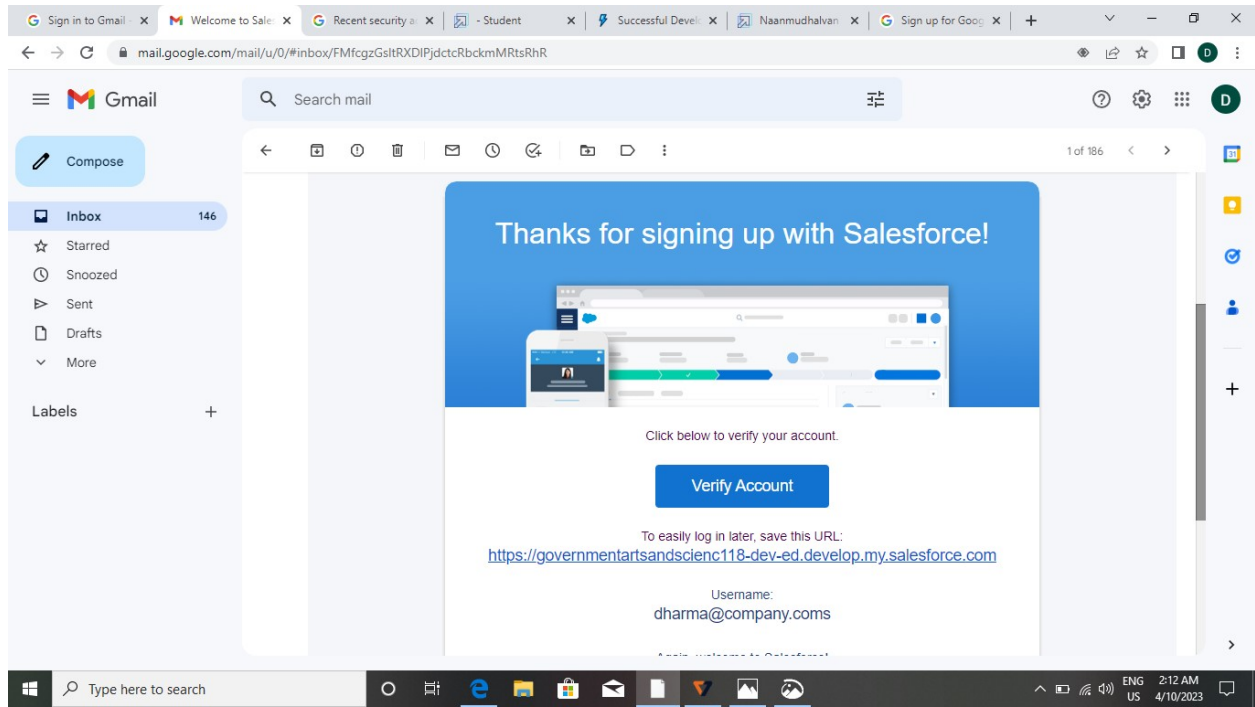
Salesforce Setup page for Passport, showing the "New Custom Field" configuration. The field is named "Permanent Address" with a length of 18. The configuration includes options for Required, Unique, and Case Insensitive values.

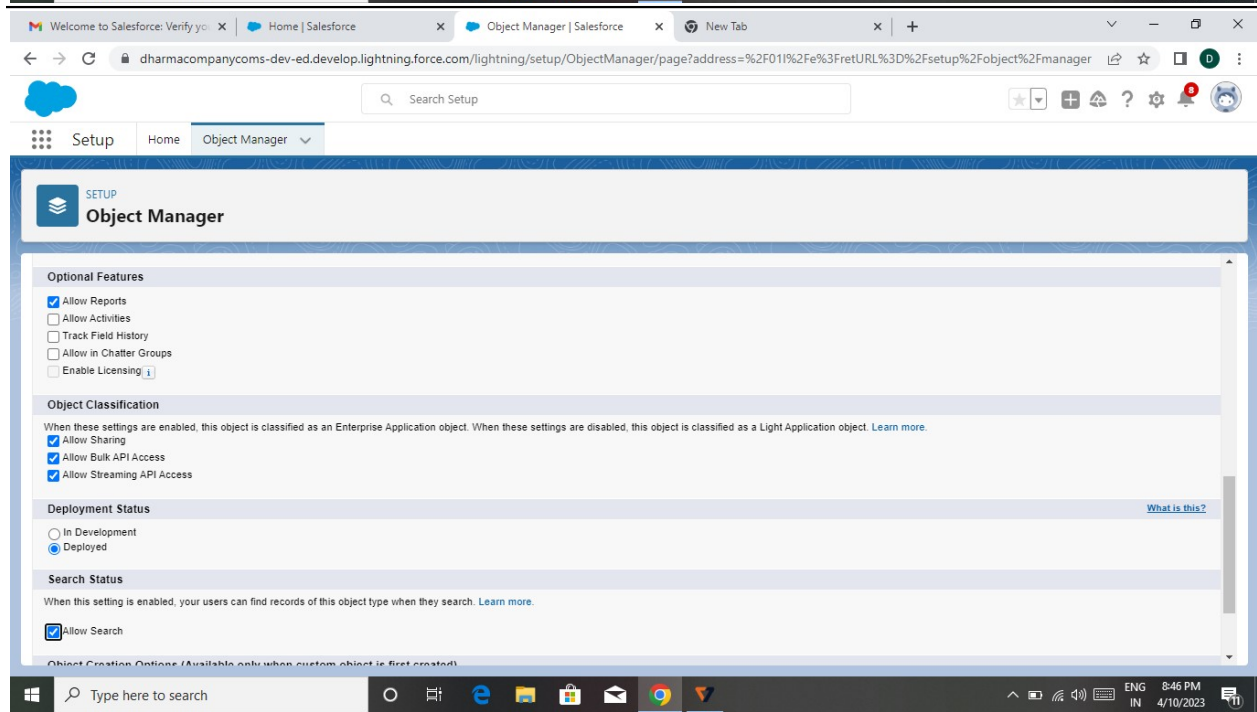
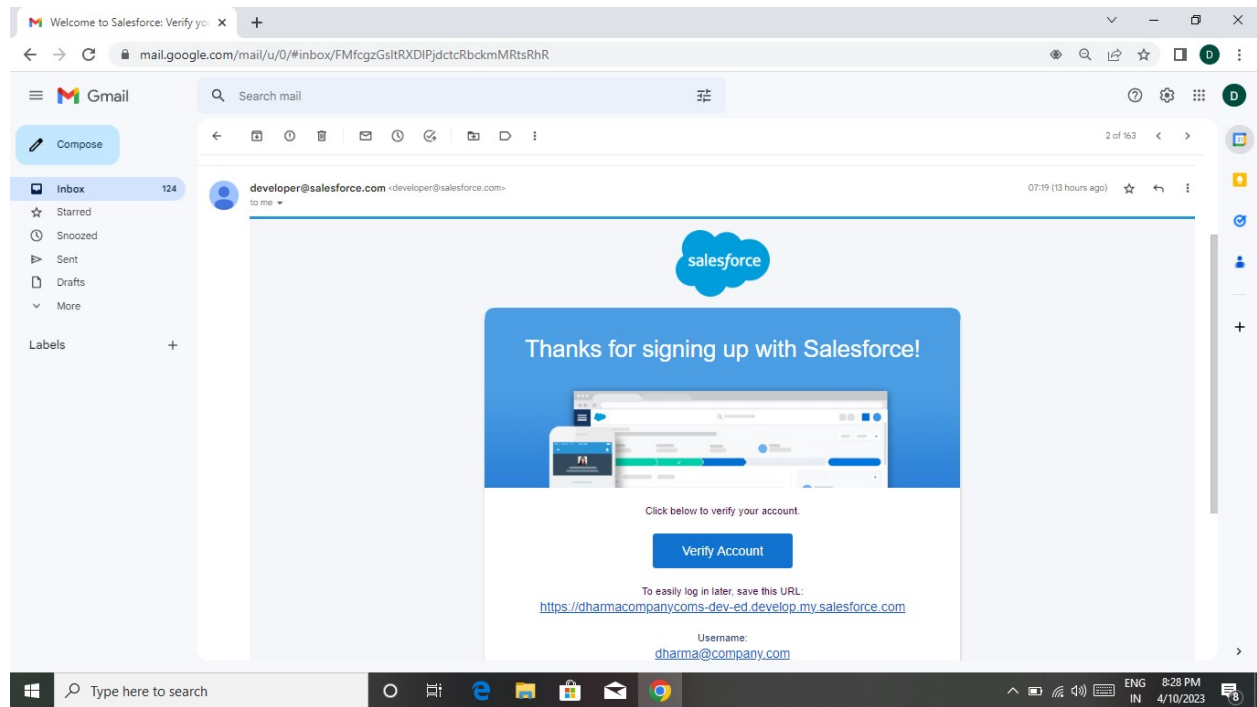
SETUP > OBJECT MANAGER  
Passport

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

Passport  
New Custom Field  
Step 2. Enter the details  
Step 2 of 4

Field Label: Permanent Address  
Length: 18  
Field Name: Permanent\_Address  
Description:  
Help Text:  
Required: ☐ Always require a value in this field in order to save a record  
Unique: ☐ Do not allow duplicate values  
☒ Treat "ABC" and "abc" as duplicate values (case insensitive)





**Trailhead Profile Public URL:**

Team lead - <https://trailblazer.me/id/dhare20>

Team Member 1 - <https://trailblazer.me/id/aanish2003>

Team Member 2 - <https://trailblazer.me/id/arula14>

Team Member 3 - <https://trailblazer.me/id/chboy11>






**Advantages:**

- ✓ It allows for more effective sales and marketing.
- ✓ It can speed up the sales conversion process.
- ✓ It increases staff productivity, lowers time costs and boosts morale.
- ✓ It enables widely dispersed teams to work closely.
- ✓ Can improve customer loyalty through exceptional experience.

**Disadvantages:**

- ✓ Staff over-reliance on CRM may diminish customer loyalty through a bad experience.
- ✓ Security concerns associated with centralised data.
- ✓ The excess initial time and productivity cost of implementation
- ✓ It requires a process-driven sales organisation.
- ✓ It may not suit every business.

**Applications:**

-  Tracking Customers
-  Collecting Data for Marketing
-  Improving Interactions and Communications
-  Streamlining Internal Sales Processes
-  Planning Your Operations.

**Conclusion:**

Customer Relationship Management enables a company to align its strategy with the needs of the customer in order to best meet those needs and thus ensure long-term customer loyalty. However, in order to be successful in these aims, the different company departments have to work together and use measures in a coordinated fashion. This purpose is achieved via a customer database which is analyzed and updated using CRM software.

This approach will be of particular interest to companies operating in highly competitive markets where it is difficult to attract new customers.

### **Future Scope:**

These days, numerous small and medium-sized enterprises are arising across the world. Unlike large organizations, they are reluctant to implement CRM software. However, the preferences and requirements might change with time. There was a time when CRM used to be meant for expensive infrastructure and complex technicalities. These, in turn, increased the expense of the CRM software and made it unaffordable for companies which have a small investment.

These days, numerous small and medium-sized enterprises are arising across the world. Unlike large organizations, they are reluctant to implement CRM software. However, the preferences and requirements might change with time. There was a time when CRM used to be meant for expensive infrastructure and complex technicalities. These, in turn, increased the expense of the CRM software and made it unaffordable for companies which have a small investment.

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.