

CRM APPLICATION THAT HELPS TO BOOK A VISA SLOT

Date	20.04.2023
Team ID	NM2023TMID05586
Project Name	CRM application that helps to book a visaslot
Team Leader	NIVETHA .S
Team Member	MADHUNISHA .L
	GANESH .M
Team Member	SUBINATH R

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.

2. PROBLEM DEFINITION & DESIGN THINKING

2.1. Empathy map

Empathy map

Use this framework to develop a deep, shared understanding and empathy for other people. An empathy map helps describe the aspects of a user's experience, needs and pain points, to quickly understand your users' experience and mindset.

[Share template feedback](#)

Says

What have we heard them say?
What can we imagine them saying?

Online job posting

Resume posting

Job description

Company

Candidate submission

Job created

Application tracking

Applicant Portal

Interview with candidate

Thinks

What are their wants, needs, hopes, and dreams? What other thoughts might influence their behavior?

Easy to use

Self-tracking tool

New updates

Increased compliance

Smart Alerts

Application Tracking

Platform Features

Career website

Interview

Team training

Does

What behavior have we observed?
What can we imagine them doing?

Feels

What are their fears, frustrations, and emotions? What other feelings might influence their behavior?



1

Define your problem statement

What problem are you trying to solve? Frame your problem as a clear, specific statement. This will be the focus of your brainstorm.

[Go to next](#)

How important is your problem statement?

2

Key rules of brainstorming

Go for quantity, not quality. No criticism. No self-censoring. No evaluation. No filtering. No vetoing. No saying "that's not a good idea".

- Go for quantity
- No criticism
- No self-censoring
- No evaluation
- No filtering
- No vetoing
- No saying "that's not a good idea"

2

Brainstorm

Write down any ideas that come to mind that address your problem statement.

[Go to next](#)

Brainstorm	Brainstorm	Brainstorm	Brainstorm
1. How can we improve the user experience?	2. How can we make the process faster?	3. How can we make the process more intuitive?	4. How can we make the process more secure?
5. How can we make the process more transparent?	6. How can we make the process more flexible?	7. How can we make the process more scalable?	8. How can we make the process more reliable?

Brainstorm	Brainstorm	Brainstorm	Brainstorm
9. How can we make the process more user-friendly?	10. How can we make the process more efficient?	11. How can we make the process more consistent?	12. How can we make the process more accessible?
13. How can we make the process more engaging?	14. How can we make the process more informative?	15. How can we make the process more interactive?	16. How can we make the process more collaborative?

3

Group ideas

Take turns sharing your ideas while clustering similar or related ideas as you go. Group all sticky notes have been grouped, give each cluster a sentence like label. If a cluster is bigger than six sticky notes, try and use it you and break it up into smaller sub-groups.

[Go to next](#)

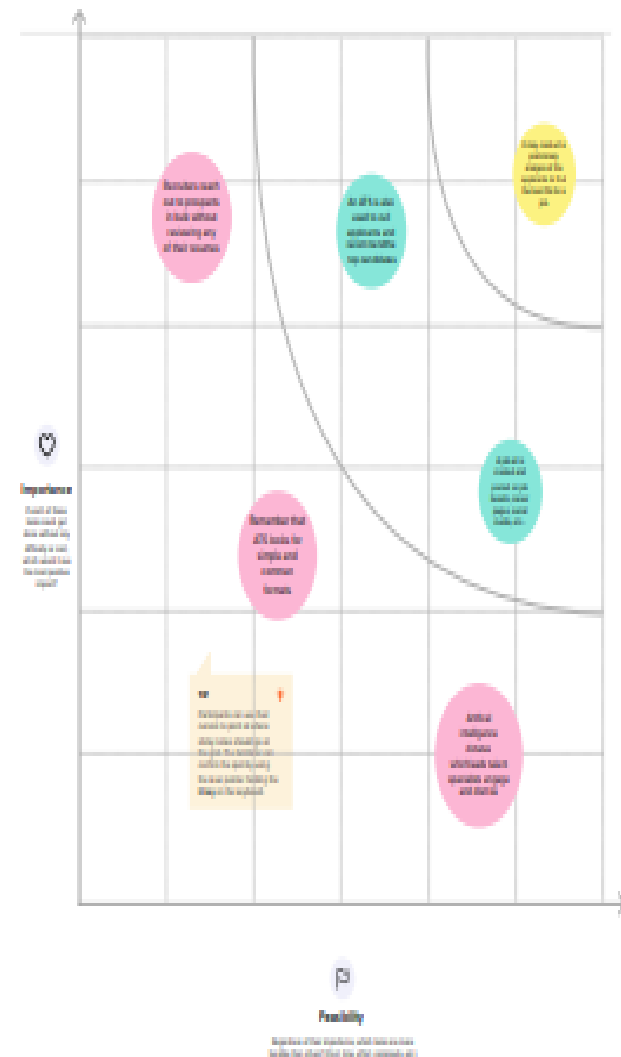


4

Prioritize

Your team should all be on the same page about what's important moving forward. Place your ideas on this grid to determine which ideas are important and which are feasible.

[Go to next](#)



5

After you collaborate

You can export the final ideas as an image or pdf to share with members of your company who might find it helpful.

Quick actions

Share feedback

Share feedback on the final output with the team.

Report the results

Report the results of the brainstorming session to the team.

Keep moving forward

Working together

Working together to solve the problem.

Customer experience journey map

Customer experience journey map.

Strength, weaknesses, opportunities, threats

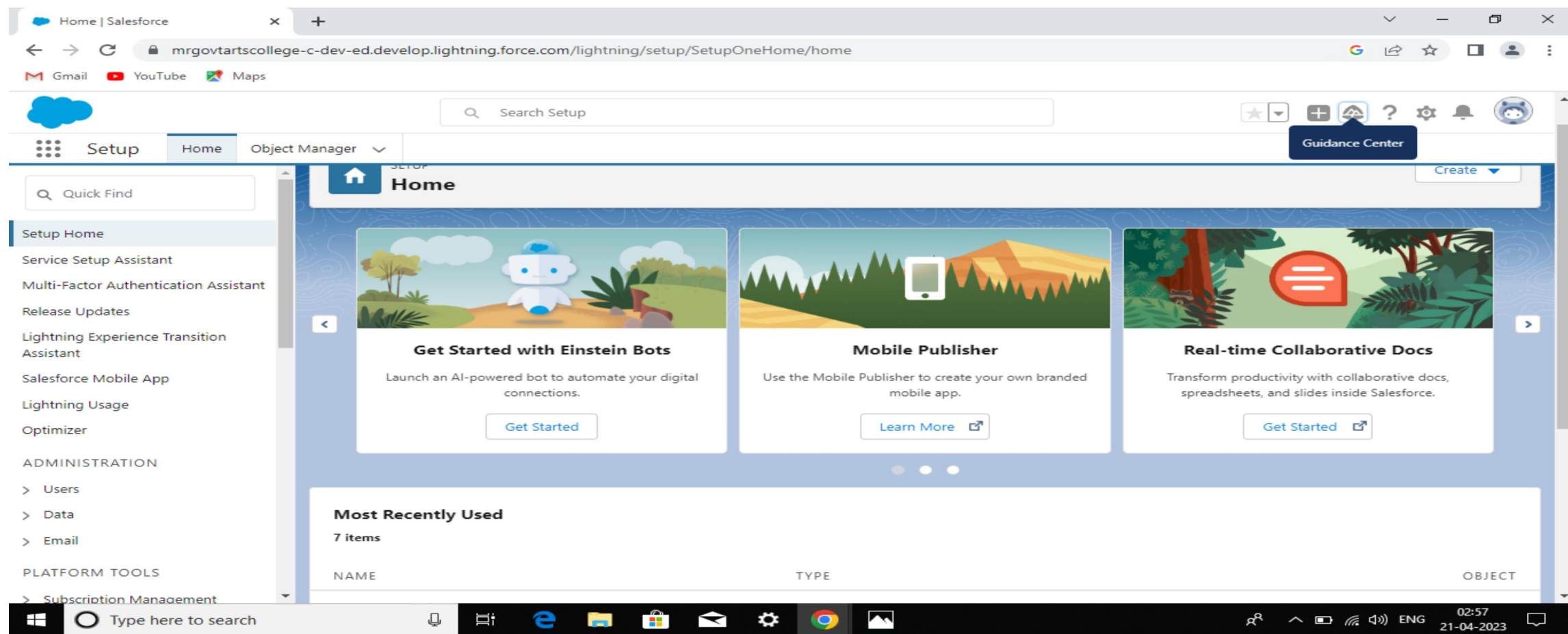
Strength, weaknesses, opportunities, threats.

[Share feedback](#)

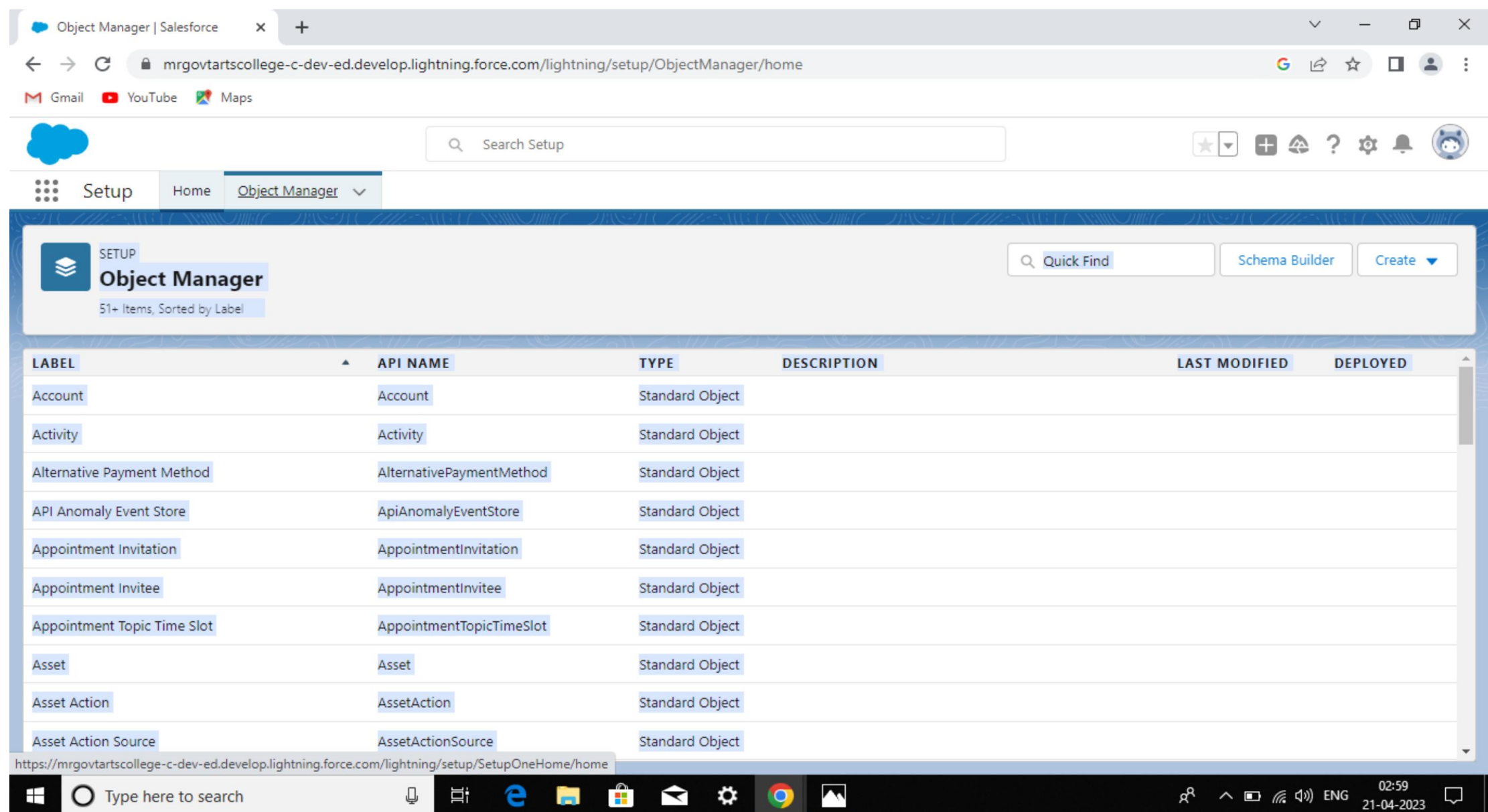
3.2. Activity & Screenshot



Milestone 1:



Milestone 2:



Milestone 3:

Tabs | Salesforce

+

← → ↻

mrgovtartscollege-c-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home

🔍

🔗

☆

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👤

⋮

Gmail

YouTube

Maps



Search Setup

🌐

+

🔒

?

⚙️

🔔

👤

Setup

Home

Object Manager

tab

User Interface

Loaded Console Tab Limit

Rename Tabs and Labels

Tabs

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

SETUP

Tabs

Custom Tabs


You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

New

What Is This?

Action	Label	Tab Style	Description
Edit Del	passports	 Airplane	

Web Tabs

New

What Is This?

No Web Tabs have been defined

Visualforce Tabs


New

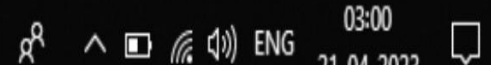
What Is This?

No Visualforce Tabs have been defined

https://mrgovtartscollege-c-dev-ed.develop.lightning.force.com/one/one.app#/se...

Type here to search





03:00
21-04-2023

visa slot | Salesforce

mrgovtartscollege-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000004Gt76/FieldsAndRelationships/page?address=%2F00N2w00...

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
visa slot

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters

visa slot Custom Field
passport
Back to visa slot

Validation Rules (0)

Custom Field Definition Detail Edit Set Field-Level Security View Field Accessibility Where is this used?

Field Information

Field Label	passport	Object Name	visa slot
Field Name	passport	Data Type	Text Area
API Name	passport__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Nivetha Sivanantham, 19/04/2023, 11:46 am	Modified By	Nivetha Sivanantham, 19/04/2023, 11:46 am

General Options

Required ☐

https://mrgovtartscollege-c-dev-ed.develop.lightning.force.com/lightning/setup/...

visa slot | Salesforce

mrgovtartscollege-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000004Gt76/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER
visa slot

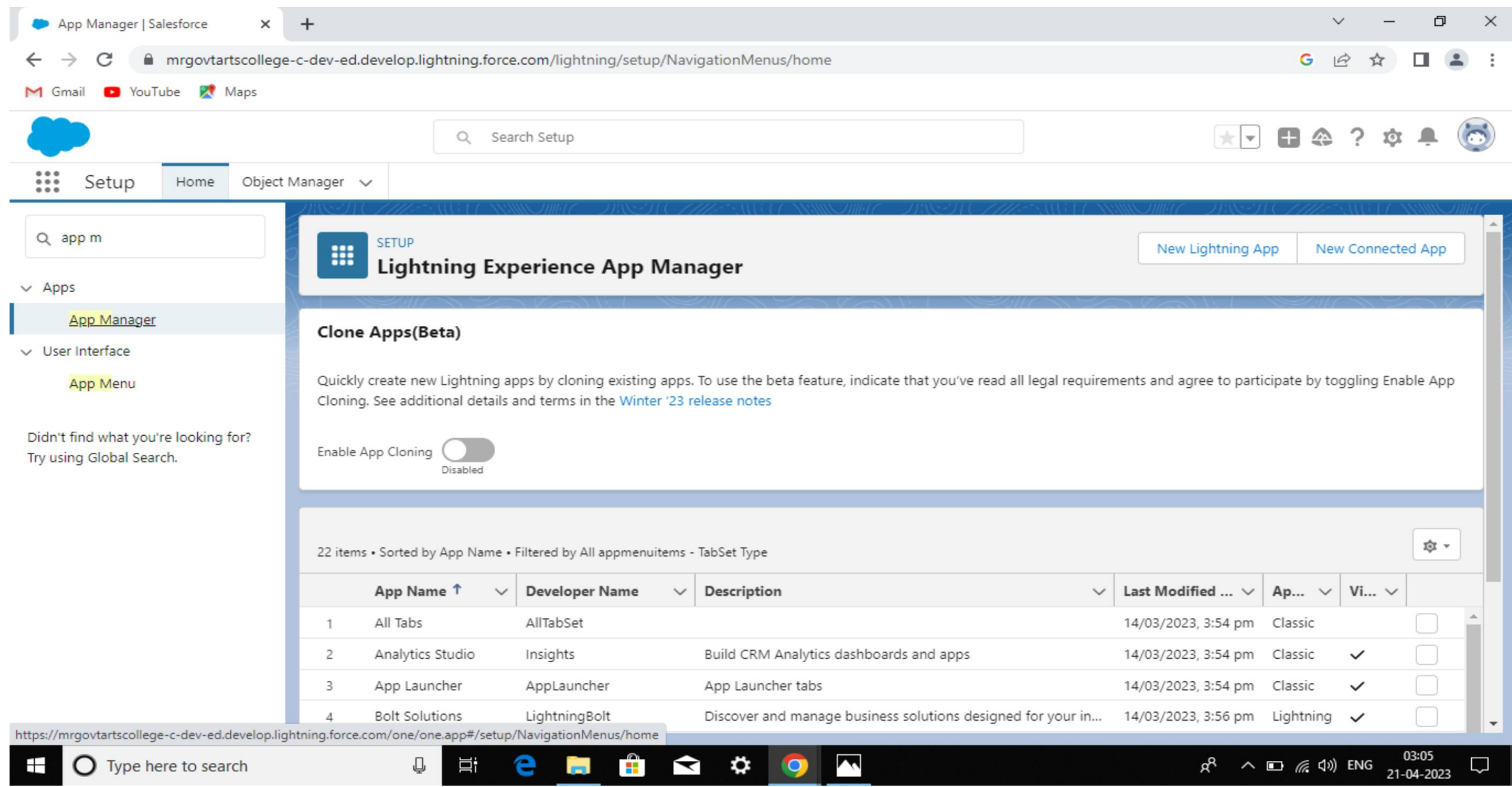
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts

Fields & Relationships
5 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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)		✓
passport	passport__c	Text Area(255)		
visa Name	Name	Text(80)		✓

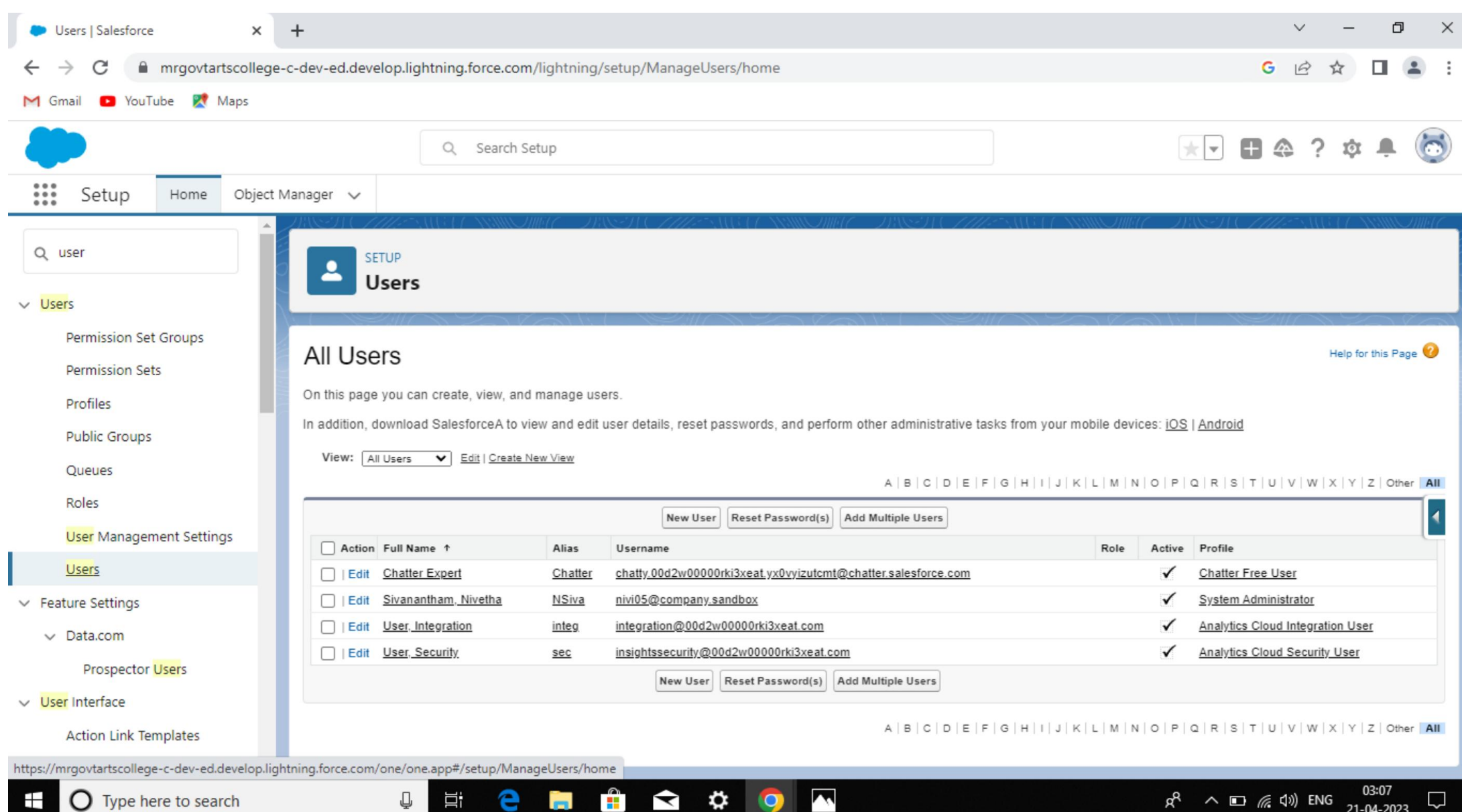
Milestone 4:



The screenshot shows the Salesforce App Manager setup page. The left sidebar contains a search bar with 'app m' and a list of navigation items: Apps, App Manager (selected), User Interface, and App Menu. The main content area is titled 'Lightning Experience App Manager' and includes a 'Clone Apps(Beta)' section with a toggle for 'Enable App Cloning' (currently disabled). Below this is a table listing 22 items, sorted by App Name. The table has columns for App Name, Developer Name, Description, Last Modified, App Type, and Visibility. The first four items are: All Tabs, Analytics Studio, App Launcher, and Bolt Solutions.

	App Name	Developer Name	Description	Last Modified	App Type	Visibility
1	All Tabs	AllTabSet		14/03/2023, 3:54 pm	Classic	<input type="checkbox"/>
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	14/03/2023, 3:54 pm	Classic	<input checked="" type="checkbox"/>
3	App Launcher	AppLauncher	App Launcher tabs	14/03/2023, 3:54 pm	Classic	<input checked="" type="checkbox"/>
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your in...	14/03/2023, 3:56 pm	Lightning	<input checked="" type="checkbox"/>

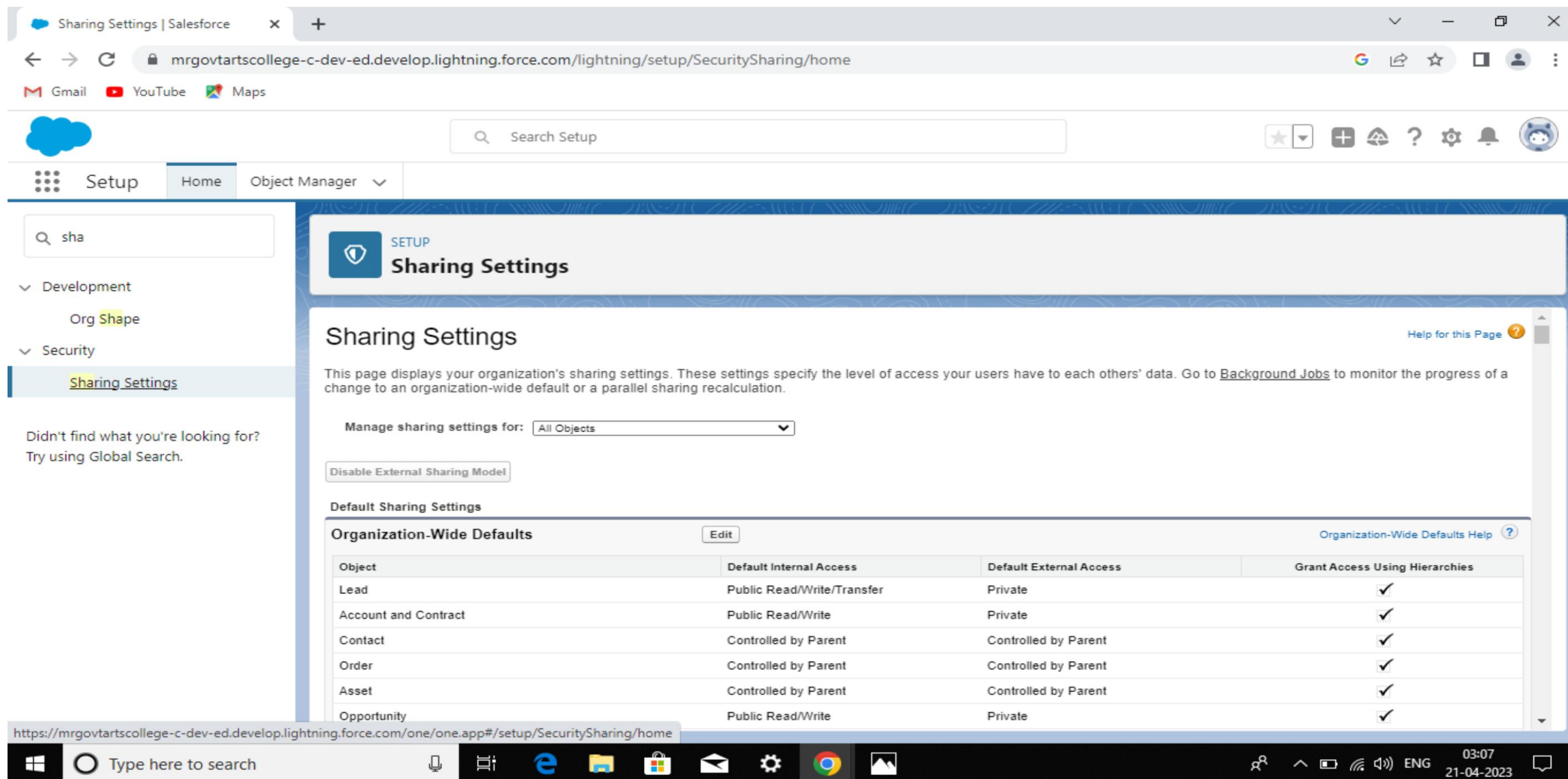
Milestone 5:



The screenshot shows the Salesforce Users management page. The left sidebar contains a search bar with 'user' and a list of navigation items: Users (selected), Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users, Feature Settings, Data.com, Prospectors, User Interface, and Action Link Templates. The main content area is titled 'All Users' and includes a 'View' dropdown set to 'All Users'. Below this is a table listing users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The first four users are: Chatter Expert, Sivanantham_Niveltha, User_Integration, and User_Security.

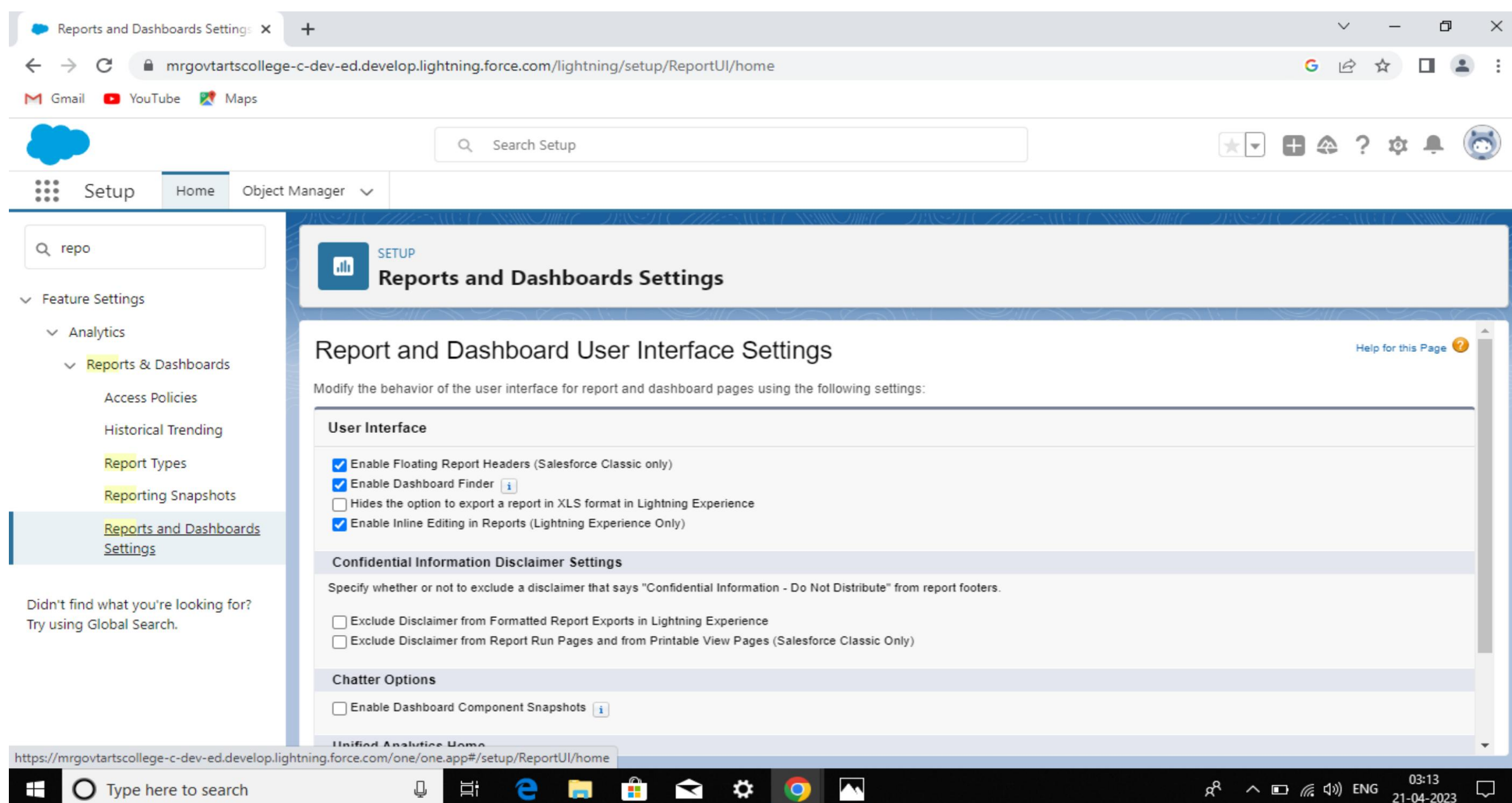
Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d2w00000rk13xeat.yx0vyjzucmt@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Sivanantham_Niveltha	NSiva	nivi05@company.sandbox		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d2w00000rk13xeat.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightsecurity@00d2w00000rk13xeat.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Milestone 6:



The screenshot shows the Salesforce Sharing Settings page in a web browser. The browser's address bar displays the URL: `mrgovtartscollege-c-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/home`. The page title is "Sharing Settings". The left sidebar contains a search bar with "sha" and a navigation menu with "Development", "Org Shape", "Security", and "Sharing Settings" (highlighted). The main content area has a "Manage sharing settings for:" dropdown set to "All Objects" and a "Disable External Sharing Model" button. Below this is the "Default Sharing Settings" section, which includes a table for "Organization-Wide Defaults".

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"/>



The screenshot shows the Salesforce Reports and Dashboards Settings page in a web browser. The browser's address bar displays the URL: `mrgovtartscollege-c-dev-ed.develop.lightning.force.com/lightning/setup/ReportUI/home`. The page title is "Reports and Dashboards Settings". The left sidebar contains a search bar with "repo" and a navigation menu with "Feature Settings", "Analytics", "Reports & Dashboards", "Access Policies", "Historical Trending", "Report Types", "Reporting Snapshots", and "Reports and Dashboards Settings" (highlighted). The main content area has a "Report and Dashboard User Interface Settings" section with a "User Interface" subsection containing several checkboxes.

User Interface

- ☒ Enable Floating Report Headers (Salesforce Classic only)
- ☒ Enable Dashboard Finder [?](#)
- ☐ Hides the option to export a report in XLS format in Lightning Experience
- ☒ Enable Inline Editing in Reports (Lightning Experience Only)

Confidential Information Disclaimer Settings

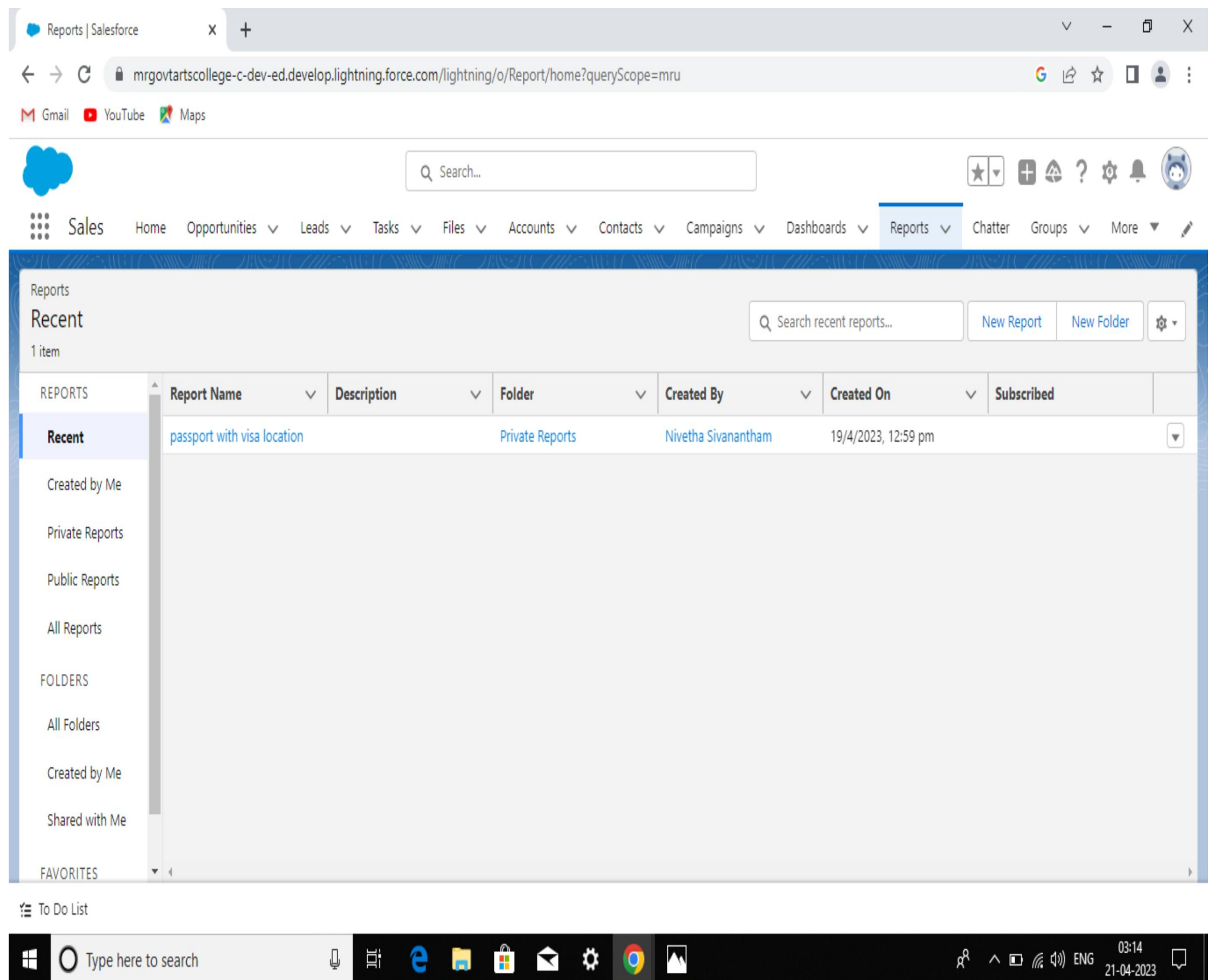
Specify whether or not to exclude a disclaimer that says "Confidential Information - Do Not Distribute" from report footers.

- ☐ Exclude Disclaimer from Formatted Report Exports in Lightning Experience
- ☐ Exclude Disclaimer from Report Run Pages and from Printable View Pages (Salesforce Classic Only)

Chatter Options

- ☐ Enable Dashboard Component Snapshots [?](#)

Milestone 7:



The screenshot shows the Salesforce Reports interface. The browser address bar displays the URL: `mrgovtartscollege-c-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru`. The Salesforce navigation bar includes the following items: Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports (selected), Chatter, Groups, and More. The Reports page header shows "Recent" with a search bar and buttons for "New Report" and "New Folder". A table lists recent reports with the following columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. The table contains one item: "passport with visa location" in the "Private Reports" folder, created by "Nivetha Sivanantham" on "19/4/2023, 12:59 pm". A left sidebar lists navigation options: RECENT, Created by Me, Private Reports, Public Reports, All Reports, FOLDERS, All Folders, Created by Me, Shared with Me, and FAVORITES. The Windows taskbar at the bottom shows the time as 03:14 on 21-04-2023.

Report Name	Description	Folder	Created By	Created On	Subscribed
passport with visa location		Private Reports	Nivetha Sivanantham	19/4/2023, 12:59 pm	

nivetha | Salesforce

mrgovtartscollege-c-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01Z2w000000fEwUEAU/view?queryScope=userFolders

Gmail YouTube Maps

Search...

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups More

Dashboard nivetha

Last refreshed 1 day ago. Refresh this dashboard to see the latest data.

As of 19-Apr-2023, 1:01 pm-Viewing as Nivetha Sivanantham

Refresh Edit Subscribe

passport with visa location

visa

0

< 33

slots

View Report (passport with visa location)

To Do List

Type here to search

03:15 21-04-2023

5. ADVANTAGES & DISADVANTAGE

Advantages:

It facilitates things by giving you and the customer, ease of communication, organized data, and improved customer service. All of this will streamline the process of making sure needs are met and actions get resolved in a timely manner.

trailhead profile public URL

team lead <https://trailblazer.me/id/nsivanantham>

members1 <https://trailblazer.me/id/mlakshmanan12>

member2 <https://trailblazer.me/id/gmuruganantham>

member 2 <https://trailblazer.me/id/sravi477>

Disadvantages:

A lack of commitment or resistance to cultural change from people within the company can cause major difficulties with CRM implementation. Customer relationships may break down and result in loss of revenue, unless everyone in the business is committed to viewing their operations from the customers' perspective.

6. APPLICATIONS

Customer relationship management (CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers. The goal is simple: Improve business relationships

7. CONCLUSION

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

8. FUTURE SCOPE

[The future of CRM] is about which companies will be able to pivot to meet the changing needs and trends — driven by customer expectations. Customers expect organizations to know a lot about them and expect to have conversations. Companies like Tact.ai and Nimble