

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

## **1 INTRODUCTION**

### **1.1 Overview**

Customers can apply for visas more quickly with the help of the Book My Visa Slot project in Salesforce. To enable clients to arrange visa appointments easily, Salesforce CRM features are integrated with a custom booking application.

Customers can choose their preferred visa category, appointment day and time, and consulate location using the system's user-friendly interface. Additionally, the system has capabilities that allow for real-time slot availability and automated customer appointment reminders.

The Text In my Visa Slot project, the entire visa application process is managed using Salesforce Sales Cloud, Service Cloud, and Custom Objects. Customer data and interactions are managed by the Sales Cloud, whereas the Service Cloud

### **1.2 Purpose**

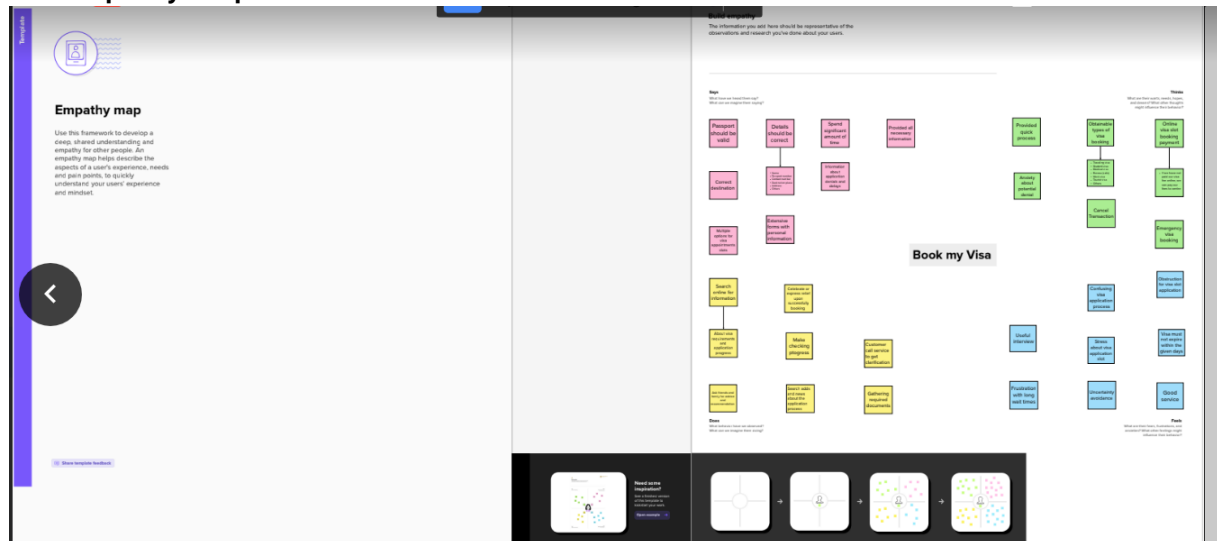
The "Book My Visa Slot" initiative in Salesforce would be designed to give people a platform to make appointments for visa applications. This project can be created to simplify the visa application procedure and enable people to schedule their visa appointments whenever it's convenient for them.

A user-friendly platform that enables users to choose a date and time for their visa appointment, check available appointment slots, and get appointment confirmation can be created using Salesforce. The platform also enables users to receive notifications about upcoming appointments and essential information about the visa application procedure.

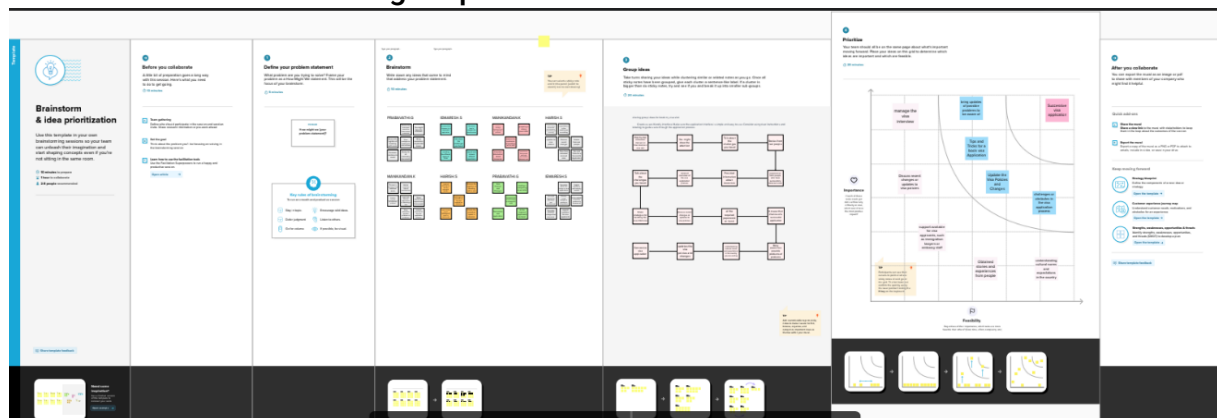
This platform can improve the customer experience and ease the administrative strain by being built on Salesforce.

## 2 Problem Definition & Design Thinking

## 2.1 Empathy Map



## 2.2 Ideation & Brainstorming Map



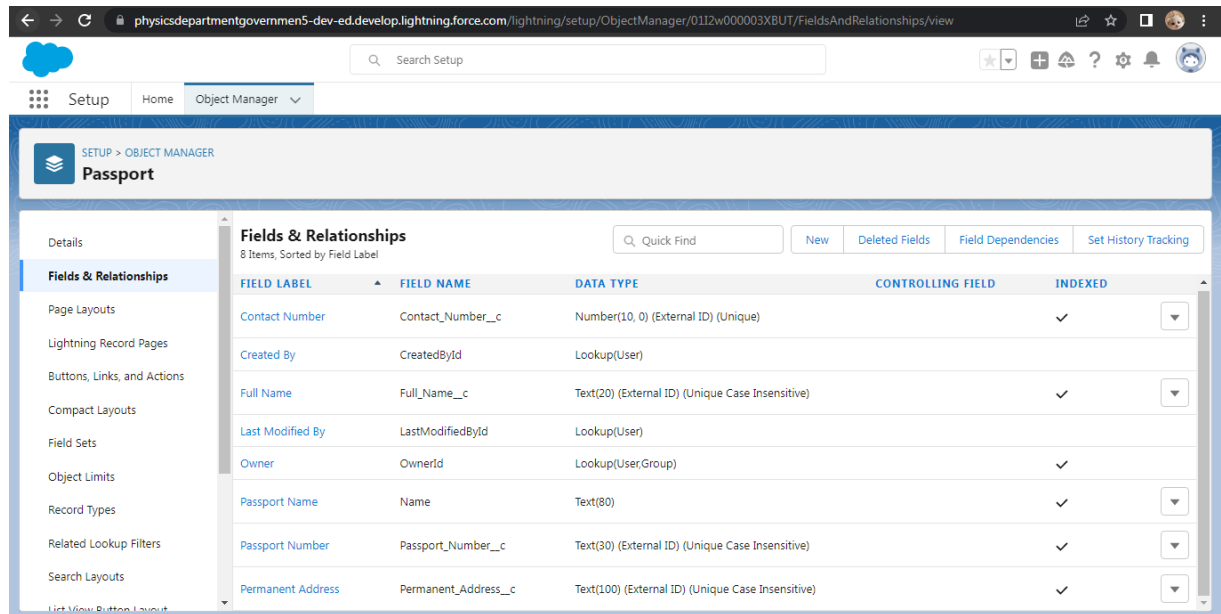
## Project Report

### 3 RESULTS3.1 Data Model:

Object name	Fields in the Object												
Object-1  PASSPORT	<table> <tr> <th>FIELD LABEL</th><th>DATA TYPE</th></tr> <tr> <td>Full Name</td><td>Text</td></tr> <tr> <td>Passport Number</td><td>Text</td></tr> <tr> <td>Contact Number</td><td>Number</td></tr> <tr> <td>Permanent address</td><td>Text</td></tr> <tr> <td></td><td></td></tr> </table>	FIELD LABEL	DATA TYPE	Full Name	Text	Passport Number	Text	Contact Number	Number	Permanent address	Text		
FIELD LABEL	DATA TYPE												
Full Name	Text												
Passport Number	Text												
Contact Number	Number												
Permanent address	Text												
Object-2  VISA SLOT	<table> <tr> <th>FIELD LABEL</th><th>DATA TYPE</th></tr> <tr> <td>Location</td><td>Geolocation</td></tr> <tr> <td>Time</td><td>Time</td></tr> <tr> <td>Passport Number</td><td>Master-Detail</td></tr> <tr> <td>Visa slot Number</td><td>Text</td></tr> </table>	FIELD LABEL	DATA TYPE	Location	Geolocation	Time	Time	Passport Number	Master-Detail	Visa slot Number	Text		
FIELD LABEL	DATA TYPE												
Location	Geolocation												
Time	Time												
Passport Number	Master-Detail												
Visa slot Number	Text												
Object-3  PAYMENT	<table> <tr> <th>FIELD LABEL</th><th>DATA TYPE</th></tr> <tr> <td>Payment mode</td><td>Currency</td></tr> <tr> <td>Card Number</td><td>Number</td></tr> <tr> <td>Transaction ID</td><td>Auto number</td></tr> <tr> <td>Cancel Transaction</td><td>Checkbox</td></tr> <tr> <td>Visa slot Number</td><td>Text</td></tr> </table>	FIELD LABEL	DATA TYPE	Payment mode	Currency	Card Number	Number	Transaction ID	Auto number	Cancel Transaction	Checkbox	Visa slot Number	Text
FIELD LABEL	DATA TYPE												
Payment mode	Currency												
Card Number	Number												
Transaction ID	Auto number												
Cancel Transaction	Checkbox												
Visa slot Number	Text												
Object-4  RESCHEDULE/CANCEL	<table> <tr> <th>FIELD LABEL</th><th>DATA TYPE</th></tr> <tr> <td>Passport number</td><td>Master-Detail</td></tr> <tr> <td>Location</td><td>Geolocation</td></tr> <tr> <td>Time</td><td>Time</td></tr> <tr> <td>Status</td><td>URL</td></tr> <tr> <td>Cancel</td><td>Checkbox</td></tr> </table>	FIELD LABEL	DATA TYPE	Passport number	Master-Detail	Location	Geolocation	Time	Time	Status	URL	Cancel	Checkbox
FIELD LABEL	DATA TYPE												
Passport number	Master-Detail												
Location	Geolocation												
Time	Time												
Status	URL												
Cancel	Checkbox												

### 3.2 Activity & Screenshot

# Project Report



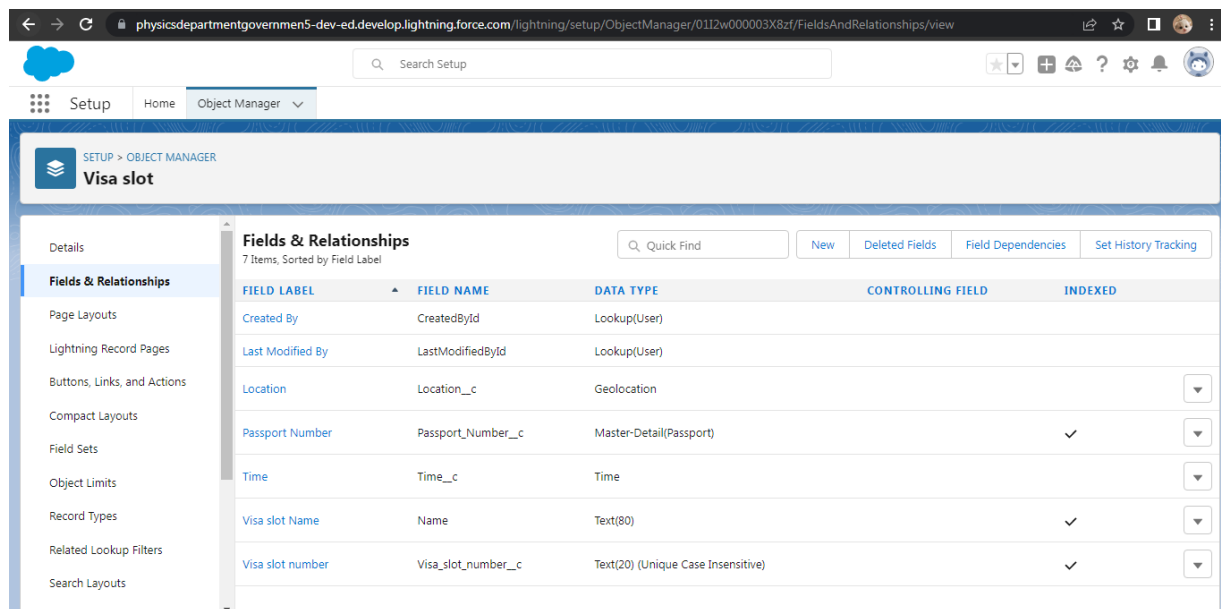
Setup > OBJECT MANAGER  
**Passport**

Details

**Fields & Relationships**  
8 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Contact Number	Contact_Number__c	Number(10, 0) (External ID) (Unique)		✓
Created By	CreatedById	Lookup(User)		
Full Name	Full_Name__c	Text(20) (External ID) (Unique Case Insensitive)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Passport Name	Name	Text(80)		✓
Passport Number	Passport_Number__c	Text(30) (External ID) (Unique Case Insensitive)		✓
Permanent Address	Permanent_Address__c	Text(100) (External ID) (Unique Case Insensitive)		✓

All the fields for the Passport object are



Setup > OBJECT MANAGER  
**Visa slot**

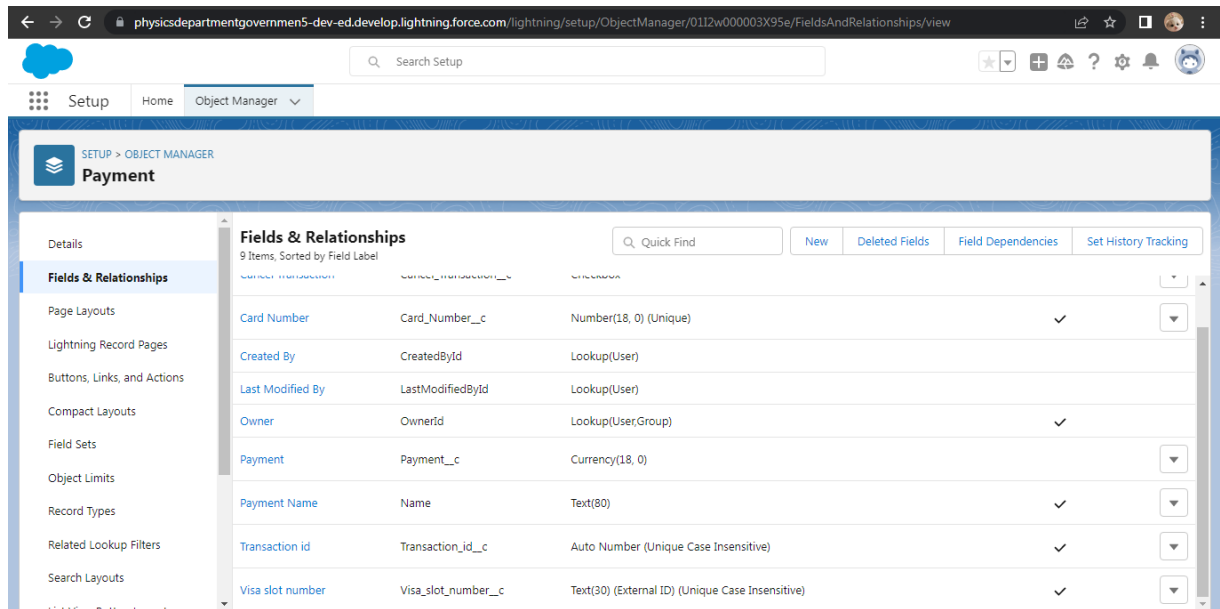
Details

**Fields & Relationships**  
7 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Location	Location__c	Geolocation		
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(20) (Unique Case Insensitive)		✓

All the fields for Candidate Object are created

# Project Report



physicsdepartmentgovernmen5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003X95e/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

**Payment**

Details

**Fields & Relationships**

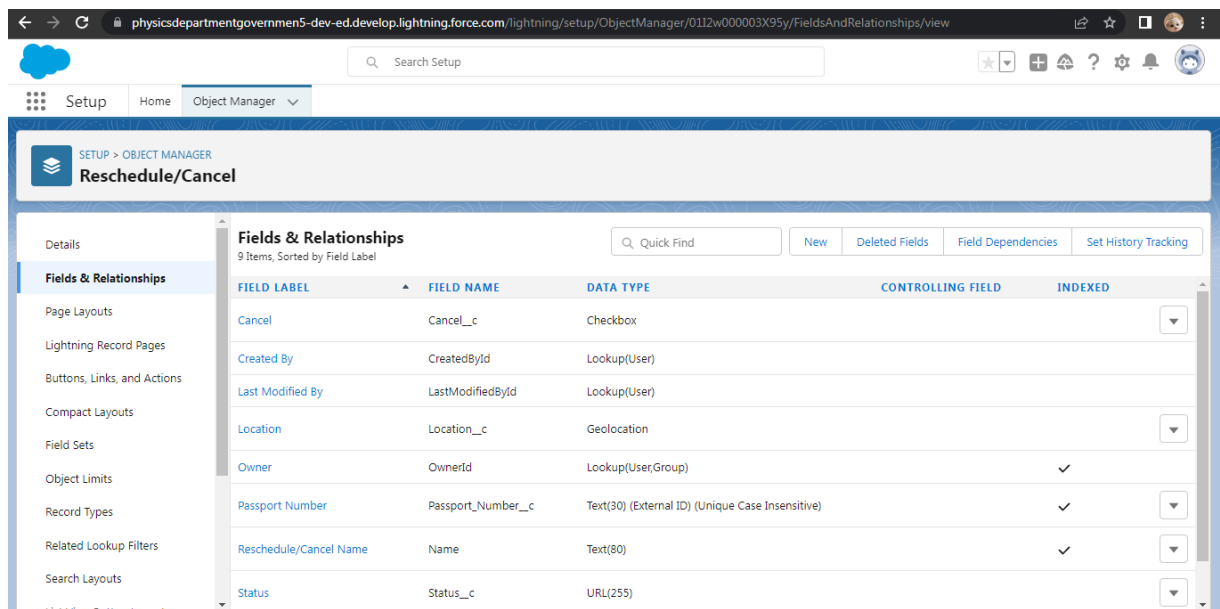
9 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Card Number	Card_Number__c	Number(18, 0) (Unique)	✓	▼
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	
Payment	Payment__c	Currency(18, 0)		▼
Payment Name	Name	Text(80)	✓	▼
Transaction id	Transaction_id__c	Auto Number (Unique Case Insensitive)	✓	▼
Visa slot number	Visa_slot_number__c	Text(30) (External ID) (Unique Case Insensitive)	✓	▼

**All the fields for Payment Object are created**



physicsdepartmentgovernmen5-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003X95y/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

**Reschedule/Cancel**

Details

**Fields & Relationships**

9 Items, Sorted by Field Label

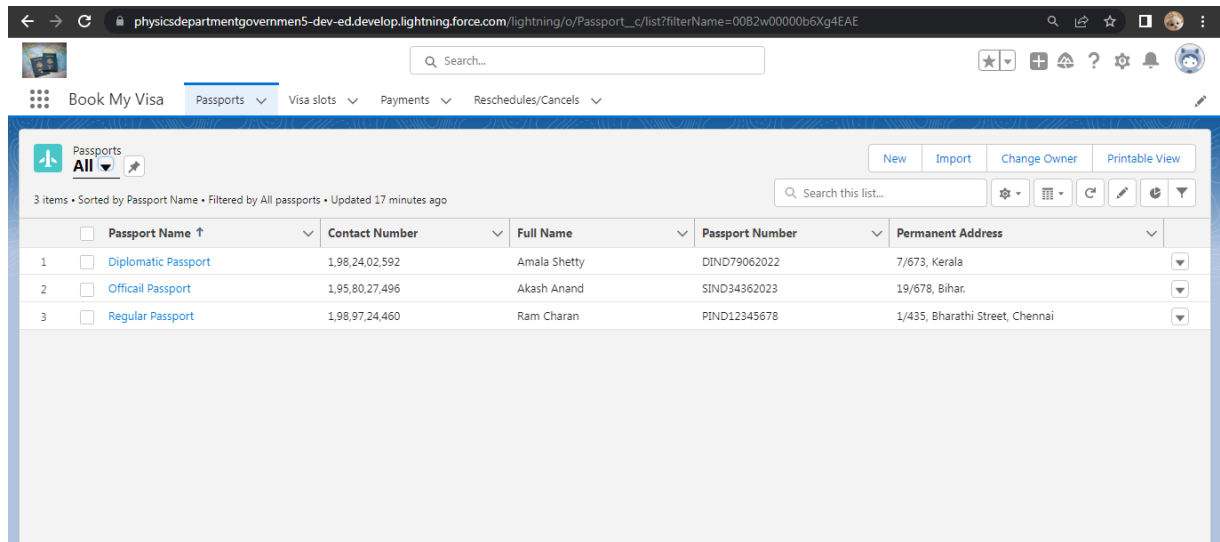
Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Cancel	Cancel__c	Checkbox		▼
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Location	Location__c	Geolocation		▼
Owner	OwnerId	Lookup(User,Group)		✓
Passport Number	Passport_Number__c	Text(30) (External ID) (Unique Case Insensitive)		✓
Reschedule/Cancel Name	Name	Text(80)		✓
Status	Status__c	URL(255)		▼

**All the fields for Reschedule/Cancel Object are created**

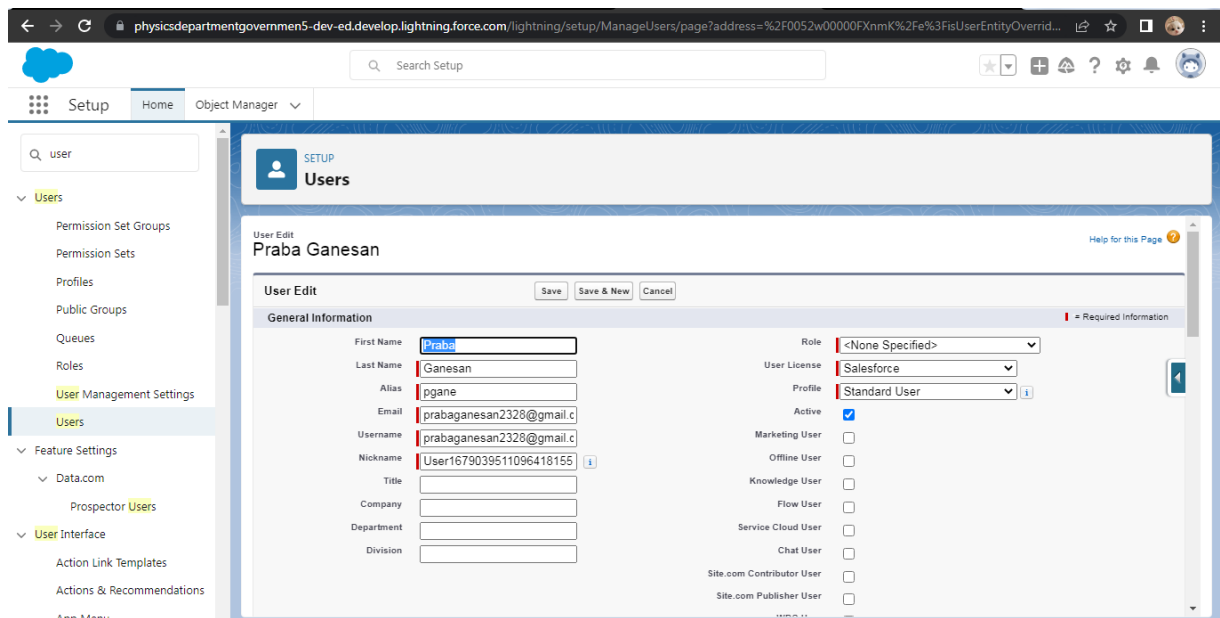
# Project Report



The screenshot shows the Lightning Force application interface. The top navigation bar includes links for "Book My Visa", "Passports", "Visa slots", "Payments", and "Reschedules/Cancels". The "Passports" section is active, displaying a list of 3 items. The table below shows the details of these passports.

	Passport Name ↑	Contact Number	Full Name	Passport Number	Permanent Address
1	Diplomatic Passport	1,98,24,02,592	Amala Shetty	DIND79062022	7/673, Kerala
2	Official Passport	1,95,80,27,496	Akash Anand	SIND34362023	19/678, Bihar
3	Regular Passport	1,98,97,24,460	Ram Charan	PIND12345678	1/435, Bharathi Street, Chennai

The lightning app is created according to procedure



The screenshot shows the Salesforce User Management interface. The left sidebar contains a navigation menu with options like "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", and "Actions & Recommendations". The main content area displays the "User Edit" form for "Praba Ganesan".

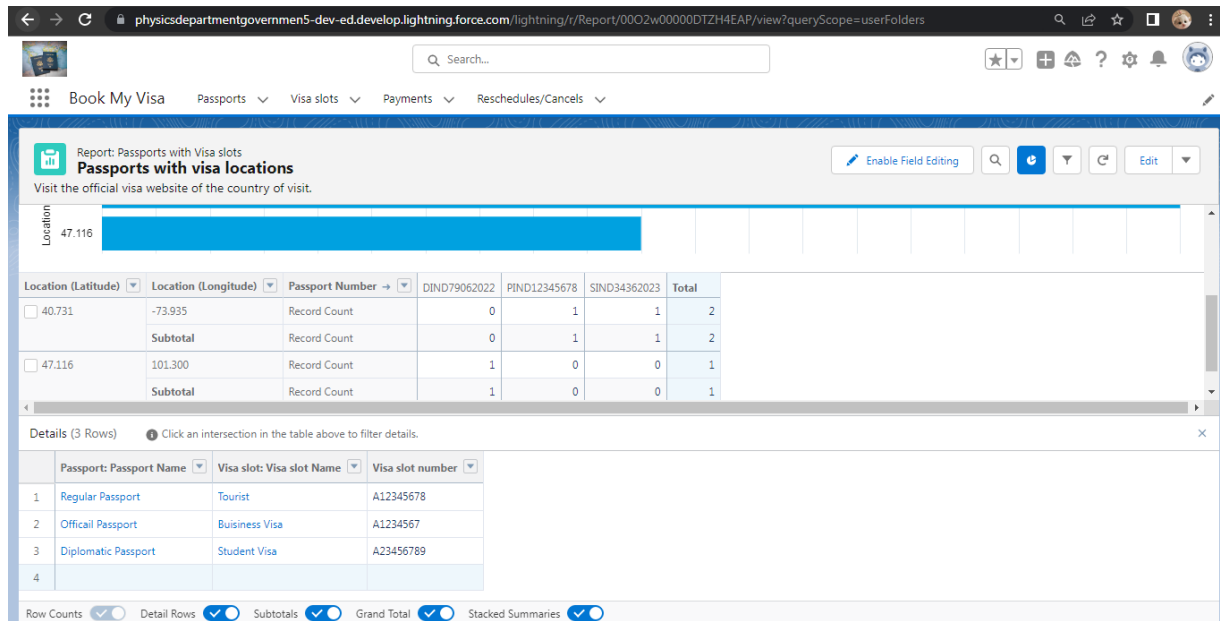
**User Edit: Praba Ganesan**

**General Information**

First Name: Praba  
 Last Name: Ganesan  
 Alias: pgane  
 Email: prabaganesan2328@gmail.c  
 Username: prabaganesan2328@gmail.c  
 Nickname: User1679039511096418155  
 Title:   
 Company:   
 Department:   
 Division:   
 Role: <None Specified>  
 User License: Salesforce  
 Profile: Standard User  
 Active: ☒  
 Marketing User: ☐  
 Offline User: ☐  
 Knowledge User: ☐  
 Flow User: ☐  
 Service Cloud User: ☐  
 Chat User: ☐  
 Site.com Contributor User: ☐  
 Site.com Publisher User: ☐

The user is created and Salesforce User profile is assigned to him

# Project Report



Report: Passports with Visa slots  
**Passports with visa locations**  
Visit the official visa website of the country of visit.

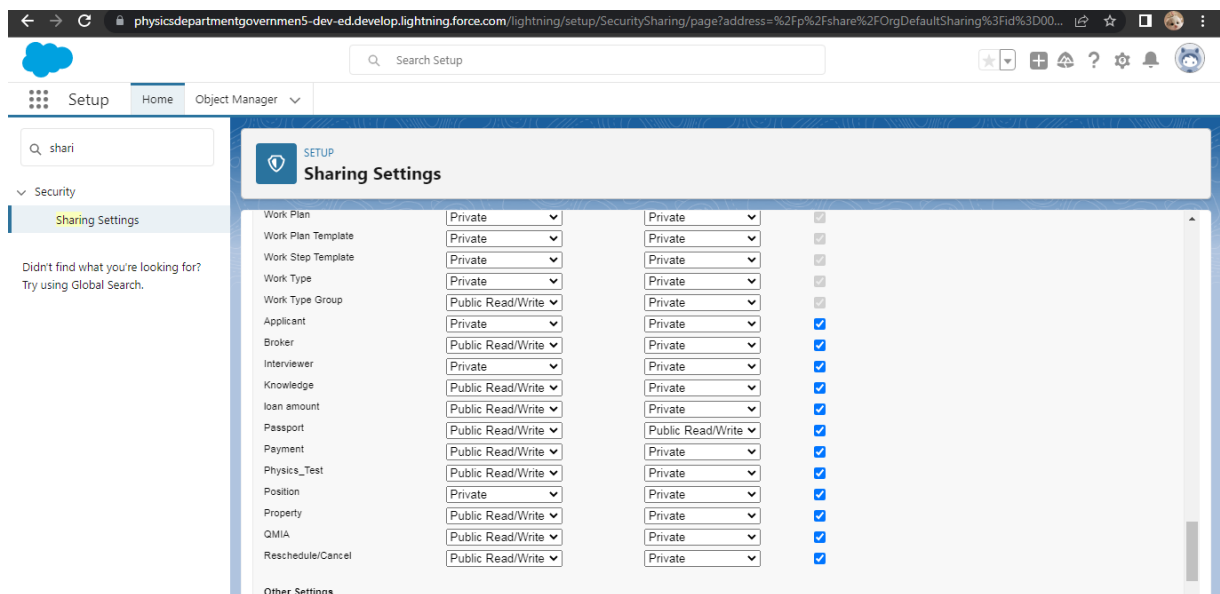
Location (Latitude)	Location (Longitude)	Passport Number	DIND79062022	PIND12345678	SIND34362023	Total
40.731	-73.935	Record Count	0	1	1	2
		Subtotal	0	1	1	2
47.116	101.300	Record Count	1	0	0	1
		Subtotal	1	0	0	1

Details (3 Rows) Click an intersection in the table above to filter details.

	Passport: Passport Name	Visa slot: Visa slot Name	Visa slot number
1	Regular Passport	Tourist	A12345678
2	Official Passport	Business Visa	A1234567
3	Diplomatic Passport	Student Visa	A23456789
4			

Row Counts ☒ Detail Rows ☒ Subtotals ☒ Grand Total ☒ Stacked Summaries ☒

The Report is created

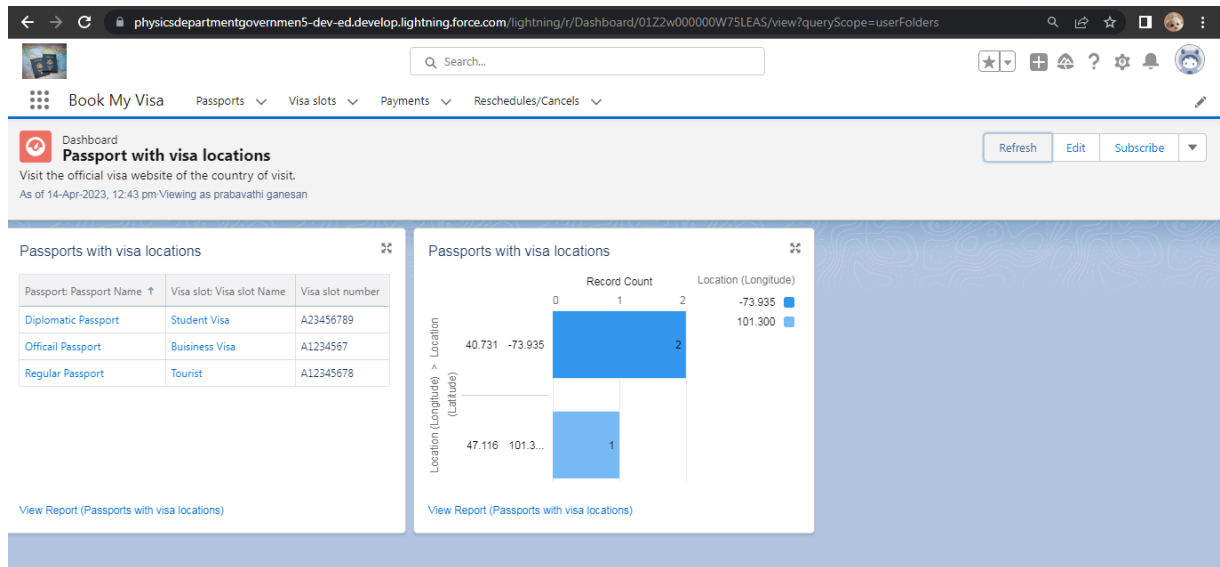


Setup **Sharing Settings**

Object	Sharing Settings	Sharing Settings	Sharing Settings
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"/>
Applicant	Private	Private	<input checked="" type="checkbox"/>
Broker	Public Read/Write	Private	<input checked="" type="checkbox"/>
Interviewer	Private	Private	<input checked="" type="checkbox"/>
Knowledge	Public Read/Write	Private	<input checked="" type="checkbox"/>
Loan amount	Public Read/Write	Private	<input checked="" type="checkbox"/>
Passport	Public Read/Write	Public Read/Write	<input checked="" type="checkbox"/>
Payment	Public Read/Write	Private	<input checked="" type="checkbox"/>
Physics_Test	Public Read/Write	Private	<input checked="" type="checkbox"/>
Position	Private	Private	<input checked="" type="checkbox"/>
Property	Public Read/Write	Private	<input checked="" type="checkbox"/>
OMIA	Public Read/Write	Private	<input checked="" type="checkbox"/>
Reschedule/Cancel	Public Read/Write	Private	<input checked="" type="checkbox"/>

Other Settings

The OWD settings is changed for Passport Object



In dashboard Vertical Bar Chart is added and the Components are added.

## 4 Trailhead Profile Public URL

Team Lead – <http://trailblazer.me/id/gp2023>

Team Member 1 – <https://trailblazer.me/id/is2023>

Team Member 2 – <https://trailblazer.me/id/pparavai>

Team Member 3 – <https://trailblazer.me/id/hsuresh14>

## 5 ADVANTAGES

For managing the visa application process, Salesforce Book My Visa Slot project has a number of benefits. Among the principal benefits are:

**Process simplification:** The project offers a simplified procedure for scheduling visa appointments, which saves time and lowers the possibility of mistakes.

A better customer experience is provided by the initiative, which makes it simple for applicants to arrange visa appointments, pick preferred locations, and get real-time updates. This enhances the general customer experience and promotes the development of effective customer connections.

**Better data management:** The project enables effective data management of appointments and visa applications, which lowers the risk of data errors and guarantees that data is readily available when needed.



## Project Report

**Increased transparency:** The project makes the visa application process more transparent, enabling

### DISADVANTAGES

The "Book My Visa" project in Salesforce may have a drawback in that it is dependent on the Salesforce platform. This means that disruptions or delays in the visa booking process could affect client satisfaction and revenue if Salesforce encounters any technical problems or downtime.

Additionally, Salesforce modification and installation can be difficult and time-consuming, requiring specialised knowledge and resources. Higher project expenses could arise from this, making it unaffordable for startups or smaller businesses.

The Salesforce platform's limited flexibility and customization possibilities could be another possible drawback. Although Salesforce has many features and functionalities, some businesses could need additional specialised solutions that are not offered by the platform

### 6 APPLICATIONS

For handling the visa application process, Salesforce can be used to implement the Book My Visa project. Several potential uses for the project in Salesforce for sales are listed below:

**Lead management:** Salesforce may be used to keep track of leads and prospects that are thinking about submitting a visa application. The lead management process may be automated with the Book My Visa project, and all the necessary data can be kept in one location.

**Sales Pipeline Management:** The project can aid in overseeing the entire visa application procedure, including keeping track of the application's status, controlling payments, and setting up appointments. This might aid sales teams in managing their pipeline and enhancing their effectiveness.

### 7 CONCLUSIONS

In conclusion, the Salesforce "Book My Visa Slot" project is a helpful tool for scheduling visa applications. The technology makes it simple for users to schedule appointments for visas, view their scheduled times, and modify their bookings. By enabling them to effectively manage their resources and give their consumers a better experience, it also gives visa application centers important insights.

This project makes use of the Salesforce platform to offer a highly adaptable and scalable solution that can be adapted to fit the unique requirements of various visa application centers. The technology also offers a smooth experience for both users and visa application centers, being user-friendly and simple to browse.

### 8 FUTURE SCOPES

## Project Report

The CRM application for the Book My Visa slot in Salesforce has a number of potential future uses, some of which include:

**Mobile Application:** By creating a mobile application for Book My Visa Slot in Salesforce, users will have mobile access to the CRM platform and will find it easier to book visa slots.

Booking visa slots will be more easy and effective with the integration of Book My Visa Slot in Salesforce with other systems including payment gateways, passport verification systems, and travel companies.

Implementing an AI-powered Chabot will improve the client experience by responding to their questions quickly and accurately and guiding them through the visa application process.

**Analytics and Reporting:** Making use of analytics and reporting tools will be beneficial for

