

CRM APPLICATION THAT HELPS TO BOOK A VISA SLOT

1 INTRODUCTION

1.1 Overview

CRM Application can help manage customer interactions and bookings for a visa slot by providing a centralized system to track customer information, visa application status, and available visa slots.

The application can include features such as a calendar with available visa slots, the ability to search and filter for specific dates and times

Additionally, the CRM can store customer information and history.

Overall, a CRM application can help streamline the visa slot booking process and improve.

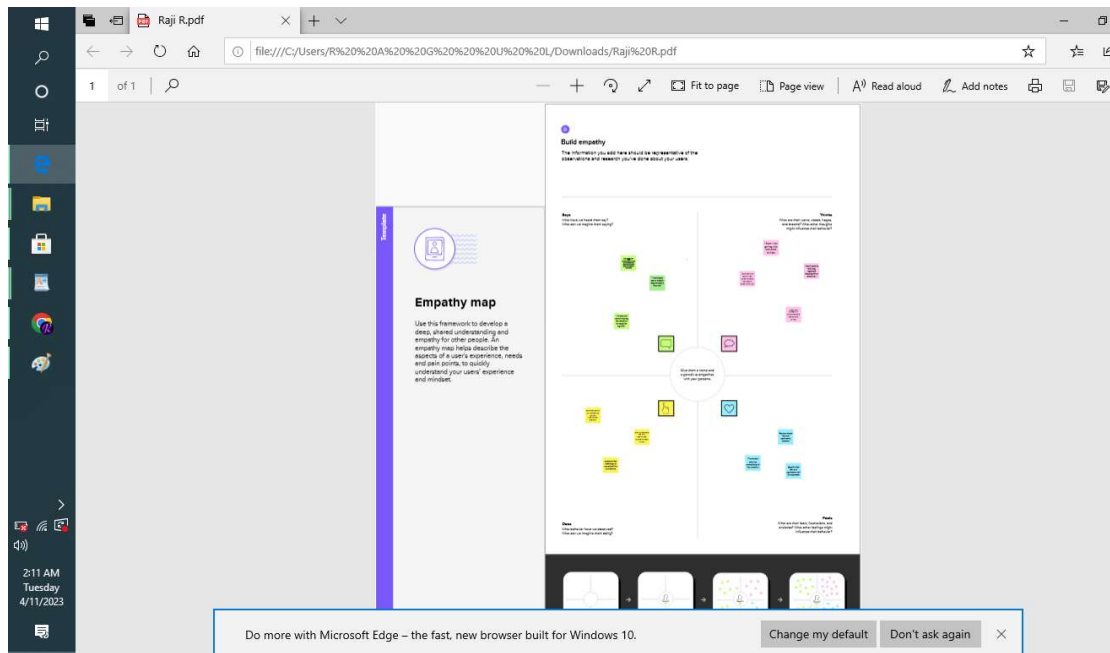
1.2 Purpose

The purpose of a CRM application that helps to book a visa slot is to provide.

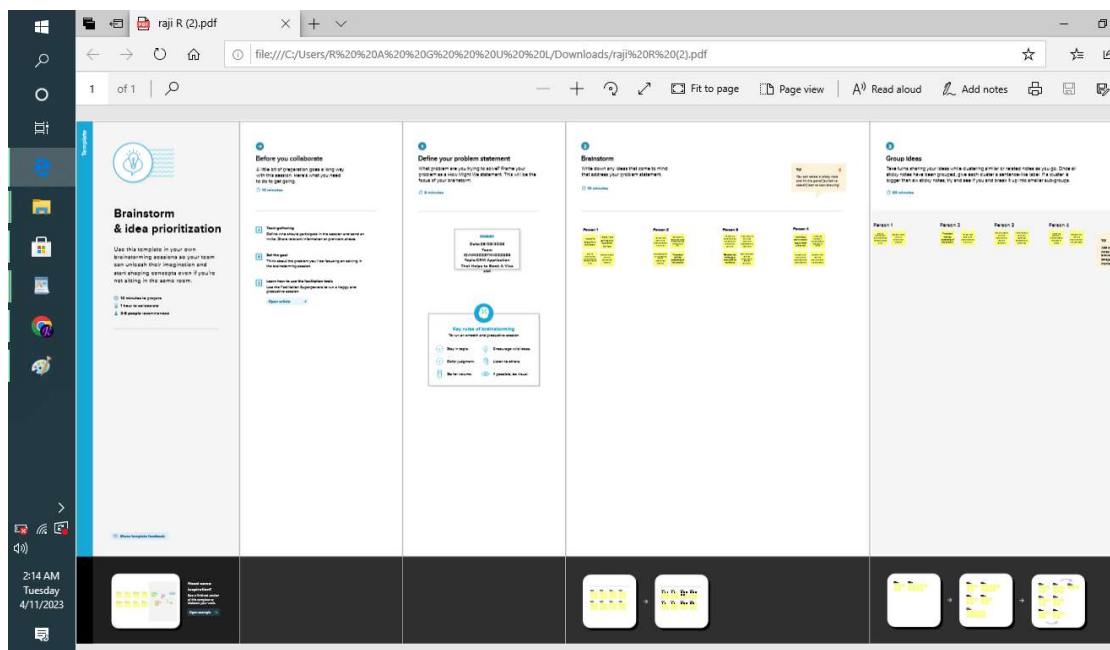
By using a CRM application for visa slot bookings, agents can easily access customer information and history, view past interactions, and tailor their services to better suit the customer's needs.

2 Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Brainstorming Map



3 RESULT

3.1 Data Model

Object name	Fields in the Object
-------------	----------------------

Object1 Passport		
	Field label	Data type
	Full name	text(18)
	Contcat number	number(18,0)
	Passport number	text(80)
	Permanent address	Text(18)
object 2 Visa slot		
	Field label	Data type
	Location	text(18)
	Passport number	master-detail(passport)
	Time	Time
	Visa slot number	text(80)

Object 3 Payment		
	Field lable	Data type
	Payment mode	text(18)
	Card number	text(18)
	Transaction id	Auto number
	Cancel transaction	text(18)
	visa slot number	Master
Object4 Reshedule/Cancel		
	Field lable	Data type
	Passprt number	Master
	Location	text(18)
	Time	time
	Cancel	text(18)
	Status	text(18)

3.2 Activity & Screenshot

Developer Portal | Salesforce | Passport | Salesforce

governmentatrscollegechidha-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003p6KT/Details/view

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

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

Edit Delete

9:29 AM
Tuesday
4/11/2023

Developer Portal | Salesforce | Passport | Salesforce

governmentatrscollegechidha-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003p6KT/FieldsAndRelationships/view

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

Fields & Relationships

7 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracks

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Contact number	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	Name	Text(80)		✓
Permanent address	Permanent_address__c	Text(18)		

https://governmentatrscollegechidha-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/0112w000003p6KT/FieldsAndRelationships/view

9:31 AM
Tuesday
4/11/2023

Developer Portal | Salesforce Dev | Visa slot | Salesforce

governmentatrscollegechidha-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000003p6Kx/Details/view

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
List View Button Layout

Details

Description

API Name
Visa_slot__c

Custom
✓

Singular Label
Visa slot

Plural Label
Visa slots

Enable Reports

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

javascript:void(0); Rules

Developer Portal | Salesforce Dev | Visa slot | Salesforce

governmentatrscollegechidha-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000003p6Kx/FieldsAndRelationships/view

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
List View Button Layout
Restriction Rules

Fields & Relationships

6 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Track

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Location	Location__c	Text(18)		
Passport number	Passport_number__c	Master-Detail(Passport)		✓
Time	Time__c	Time		
Visa slot number	Name	Text(80)		✓

Developer Portal | Salesforce Dev | Payment | Salesforce

governmentatrscollegechidha-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003p6LJ/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
Payment

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

Details

Description

API Name
Payment__c

Custom
✓

Singular Label
Payment

Plural Label
Payments

Enable Reports

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

javascript:void(0);

Developer Portal | Salesforce Dev | Payment | Salesforce

governmentatrscollegechidha-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003p6LJ/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
Payment

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

Fields & Relationships
8 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracks

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Cancel transaction	Cancel_transaction__c	Text(18)		
Card number	Card_number__c	Text(18)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Payment mode	Payment_mode__c	Text(18)		
Payment Name	Name	Text(80)		✓
Transaction ID	Transaction_ID__c	Auto Number		
Visa slot number	Visa_slot_number__c	Master-Detail(Visa slot)		✓

https://governmentatrscollegechidha-dev-ed.develop.lightning.force.com/one/app#/setup/ObjectManager/0112w000003p6LJ/FieldsAndRelationships/view

Developer Portal | Salesforce Dev | Reschedule | Salesforce

governmentatrscollegechidha-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000003p6Lv/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
Reschedule

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

Details

Description

API Name
Reschedule__c

Custom
✓

Singular Label
Reschedule

Plural Label
Reschedules

Enable Reports

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

javascript:void(0);

Developer Portal | Salesforce Dev | Reschedule | Salesforce

governmentatrscollegechidha-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/012w000003p6Lv/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER
Reschedule

Details

Fields & Relationships

8 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracks

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Cancel	Cancel__c	Text(18)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Location	Location__c	Text(18)		
Passport number	Passport_number__c	Master-Detail(Passport)		✓
Reschedule Name	Name	Text(80)		✓
Status	Status__c	Text(18)		
Time	Time__c	Time		

Restriction Rules

Developer Portal | Salesforce Dev | Users | Salesforce

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

Setup Home Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Feature Settings

Data.com

Prospector Users

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

9:54 AM Tuesday 4/11/2023

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	chatty.00d2v00000rsd9ea3.buaf421an0@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	B. Rajasri	rr	rraj@stat.com		✓	Standard User
<input type="checkbox"/> Edit	Rajini Rajasri	RRaji	rrajasri@statistics.com		✓	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@00d2v00000rsd9ea3.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d2v00000rsd9ea3.com		✓	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other

Developer Portal | Salesforce Dev | Sharing Settings | Salesforce

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

Setup Home Object Manager

sharing

Security

Sharing Settings

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

10:00 AM Tuesday 4/11/2023

SETUP Sharing Settings

Sharing Settings

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: All Objects

Disable External Sharing Model

Default Sharing Settings

Organization-Wide Defaults Edit Organization-Wide Defaults Help

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	✓

Developer Portal | Salesforce Dev | Sharing Settings | Salesforce

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

Setup Home Object Manager

Q sharing

Security

Sharing Settings

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

SETUP Sharing Settings

Work Step Template	Private	Private	✓
Work Type	Private	Private	✓
Work Type Group	Public Read/Write	Private	✓
Passport	Public Read/Write	Private	✓
Payment	Controlled by Parent	Controlled by Parent	
Reschedule	Controlled by Parent	Controlled by Parent	
Visa slot	Controlled by Parent	Controlled by Parent	

Other Settings

Other Settings Help ?

Manager Groups ☐ ?

Secure guest user record access ☒ ?

Require permission to view record names in lookup fields ☐ ?

Sharing Rules

Lead Sharing Rules

New Recalculate

Lead Sharing Rules Help ?

No sharing rules specified.

Account Sharing Rules

New Recalculate

Account Sharing Rules Help ?

No sharing rules specified.

10:00 AM Tuesday 4/11/2023

Developer Portal | Salesforce Dev | Reports | Salesforce

governmentatrcollegechidha-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

Book my visa Passports Visa slots Payments Reschedules Reports Report Builder

Reports

Recent

1 item

Search recent reports...

New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Passports with visa locations		Private Reports	Rajesh Rajini	6/4/2023, 9:22 pm	

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

10:02 AM Tuesday 4/11/2023

Developer Portal | Salesforce Dev | Passports with visa locations | Salesforce

governmentatrscollegechidha-dev-ed.develop.lightning.force.com/lightning/r/Report/00O2w00000E9OWtEAN/view?queryScope=userFolders

Search...

Book my visa Passports Visa slots Payments Reschedules Passports with visa locations Report Builder

Report: Passports with visa locations
Passports with visa locations

Enable Field Editing Add Chart Edit

Total Records
3

Location	Passport ID	a002w00000M3oeo	a002w00000M3oep	a002w00000M3oez	Total
<input type="checkbox"/> Chennai	Record Count	0	1	0	1
<input type="checkbox"/> Mumbai	Record Count	0	0	1	1
<input type="checkbox"/> New Delhi	Record Count	1	0	0	1
Total	Record Count	1	1	1	3

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

	Passport number	Visa slot number
1	3536we	V-002
2	456gh	V-003
3	09r243	V-001
4		

Row Counts Detail Rows Grand Total Stacked Summaries

10:04 AM
Tuesday
4/11/2023

Developer Portal | Salesforce Dev | Dashboards | Salesforce

governmentatrscollegechidha-dev-ed.develop.lightning.force.com/lightning/a/Dashboard/home?queryScope=mrui

Search...

Book my visa Passports Visa slots Payments Reschedules Passports with visa locations Report Builder Dashboards

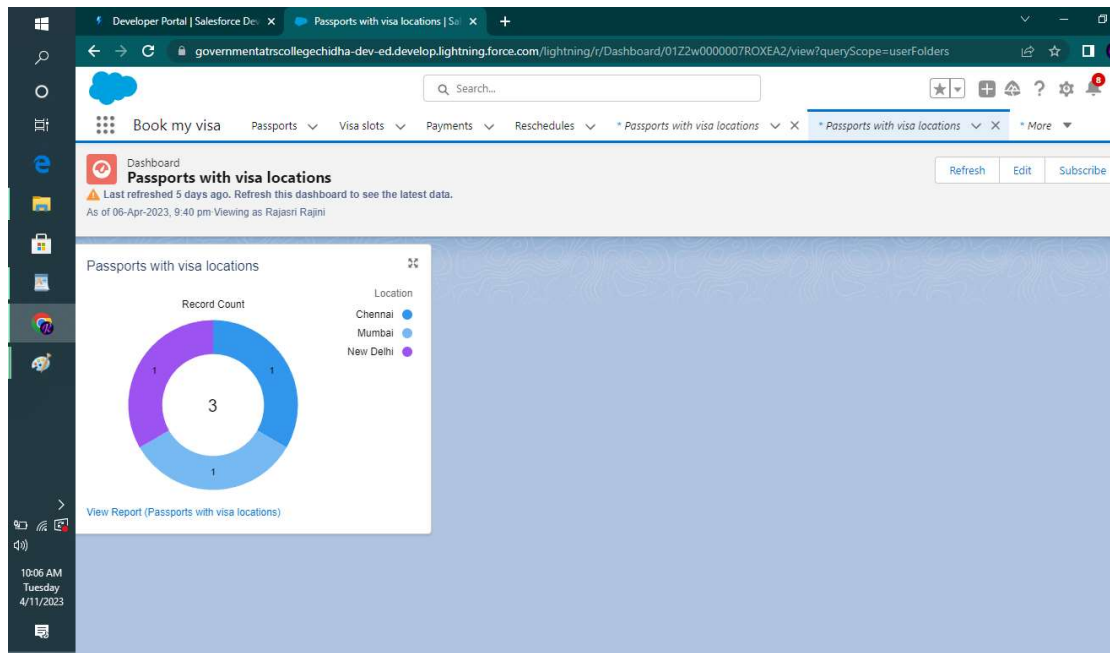
Dashboards

Recent

Search recent dashboards... New Dashboard New Folder

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Passports with visa locations		Private Dashboards	Rajasri Rajini	6/4/2023, 9:23 pm	
Created by Me						
Private Dashboards						
All Dashboards						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

10:06 AM
Tuesday
4/11/2023



4 TRAILHEAD PROFILE PUBLIC URL

Team Lead - <https://trailblazer.me/id/hgahlot3>

Team Member 1- trailblazer.me/id/rrajini4

Team Member 2-[trailblazer .me/id/radevi2](https://trailblazer.me/id/radevi2)

Team Member 3-trailblazer.me/id/rrabin85

Team Member 4-[traiblazer.me/id/prakp990](https://trailblazer.me/id/prakp990)

5 ADVANTAGES & DISADVANTAGE

Advantages:

Automated reminders: A CRM application can send automated reminders to customers regarding their appointments and notify them of any changes or updates to their application status. This can help reduce no-show and improve the customer experience.

Better customer experience: A CRM application can provide a seamless and convenient booking experience for customers.

Centralized System: A CRM application provides a centralized system for managing customer interactions and visa slot bookings.

Disadvantage:

Technical issues: A CRM application may experience technical issues downtime, which can cause delays or errors in the booking process. This can lead to

frustration for customers and reduced productivity for the organization.

Training: Agents may require training to effectively use the CRM applications, which can take time and resources away from other tasks.

Cost: Implementing and maintaining a CRM application can be costly, especially for small or medium-sized business.

6 APPLICATIONS

Define requirements: The first step is to define the requirements for the application. This involves understanding the needs of the organization and the customers, identifying the key features and functionality required, and determining the technical requirements and constraints.

Design the application: Once the requirements are defined, the application can be designed.

7 CONCLUSION

Some of the advantages of using a CRM application for visa slot bookings include automated reminders, improved efficiency, better customer experience, and increased customer loyalty.

Overall, organizations should carefully weigh the benefits and drawbacks of implementing a CRM application for visa slot bookings and ensure that they have the necessary resources and expertise to effectively implement and maintain the system.

8 FUTURE SCOPE

Mobile optimization: As more people use mobile devices to access the internet and complete transactions, a CRM application that helps to book a visa slot will need to be optimized for mobile devices.

Artificial intelligence (AI) and machine learning (ML): AI and ML technologies can be used to automate certain aspects of the visa applications process, such as providing personalized recommendations for visa types, identifying potential issues with applications, and suggesting improvements to applications.

Chatbots and virtual assistants: Chatbots and virtual assistants can be used to provide real-time customer support and answer questions related to the visa applications process.

