CRM APPLICATION THAT HELPS TO BOOK A VISA SLOT

INTRODUCTION

Overview:

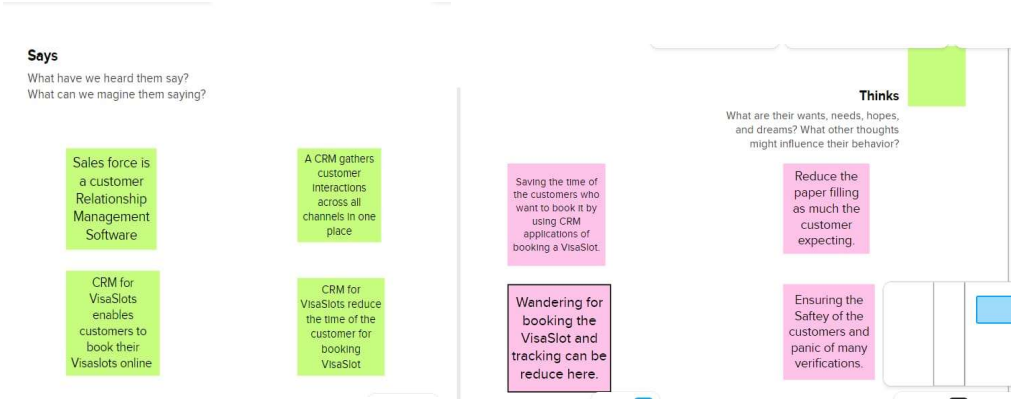
A Visa Slot management project is a system that used to track and manage the availability of visa slot, which are appoints that are required for certain visa applications. It might be used by a government agency or a visa processing centre to schedule and manage appointment with applicants.

Purpose:

Saving the time of the customers who want to book it by using CRM application of booking a Visa Slot. Wandering for booking the Visa Slot and tracking can be reduce here. Reduce the paper filling as much the customer expecting. Ensuring the safety of the customers and panic of many verification.

Problem definition and design thinking:

Empathy map:



Without being worried they can utilise it.

Booking Visa Slot using CRM application make the customers feel easy.

Many of the customer will choose CRM application for booking Visa Slot.

Making the Customer to trust the CRM.

Does

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

CRM costs one of the greatest challenges to implement CRM.

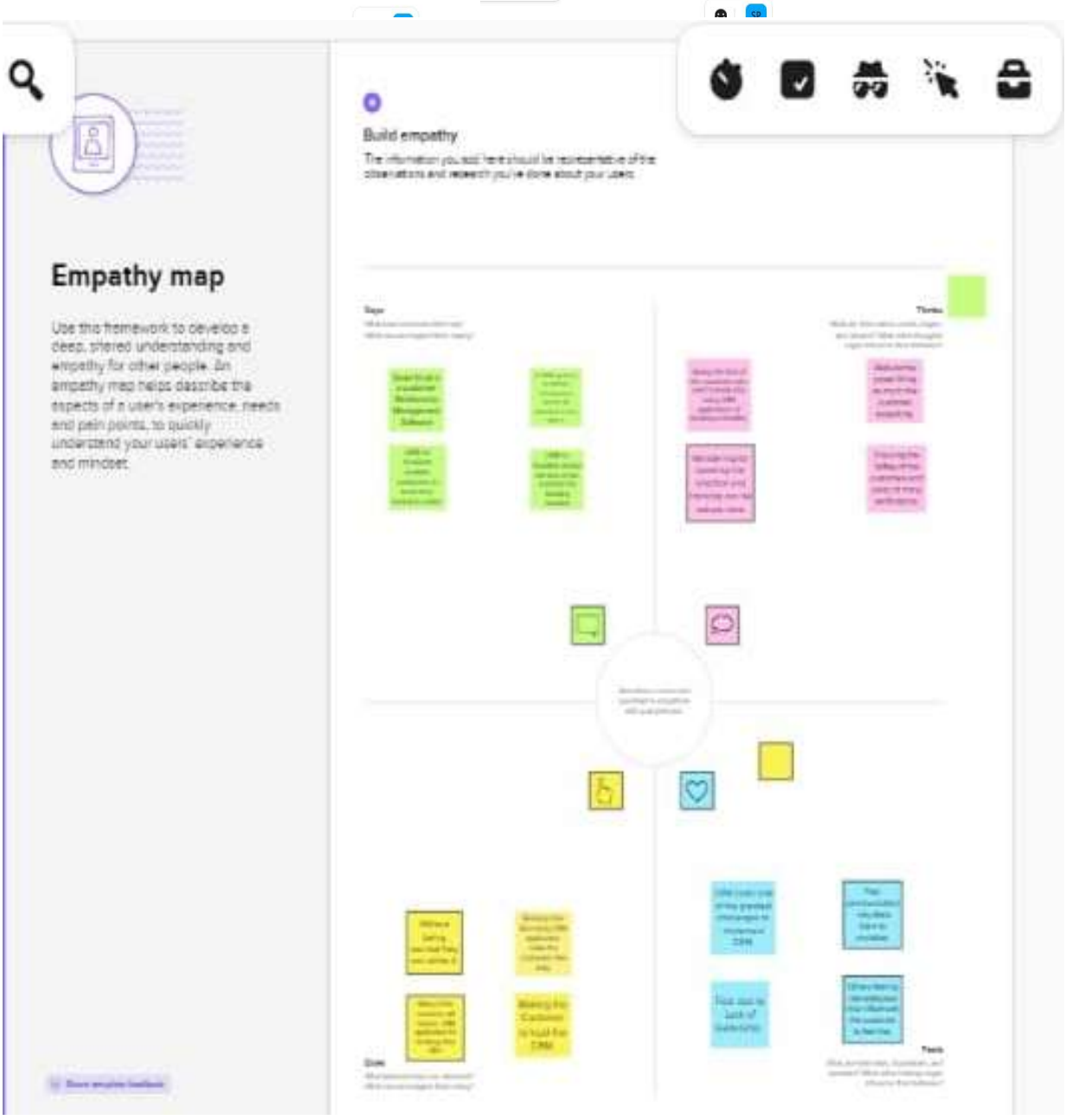
Poor communication may feels them to anxieties.

Fear due to Lack of leadership.

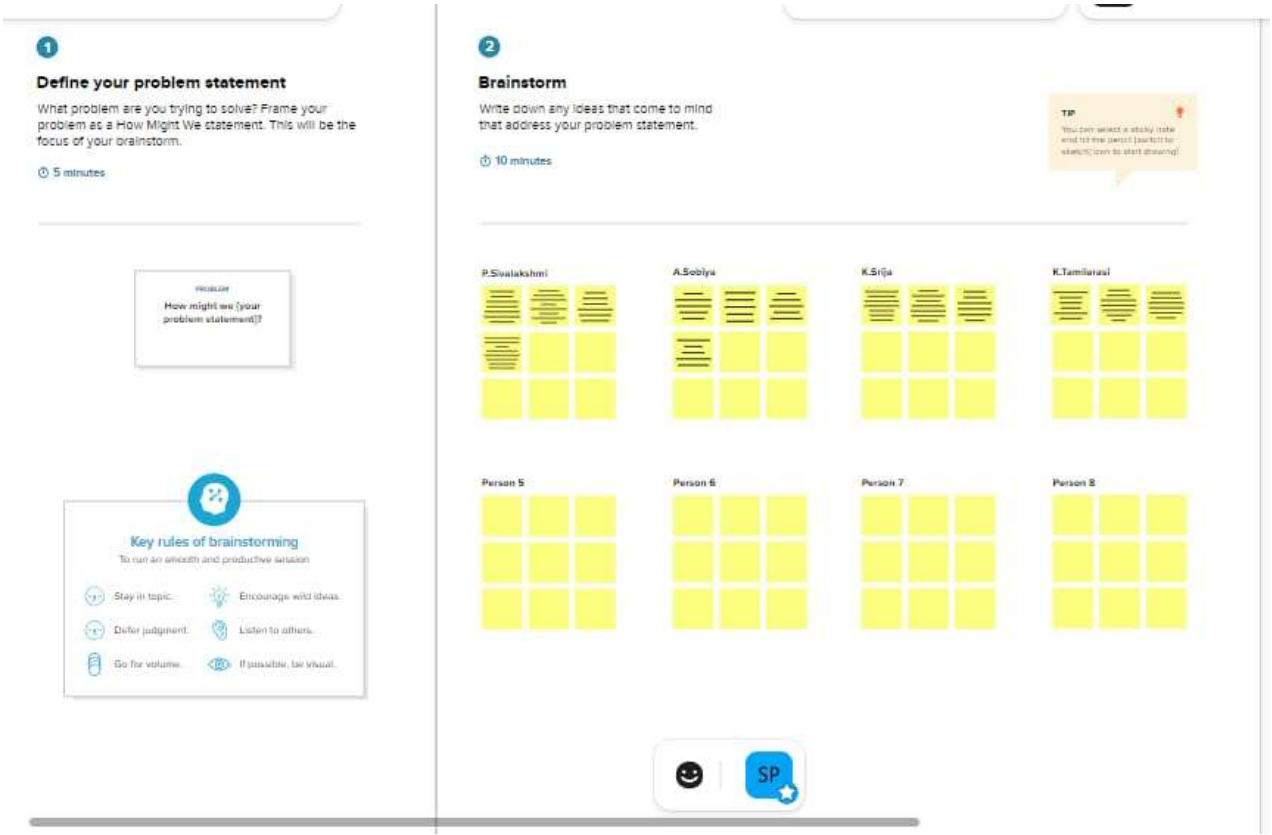
Others feeling like safetyless also influences the customer to feel like.

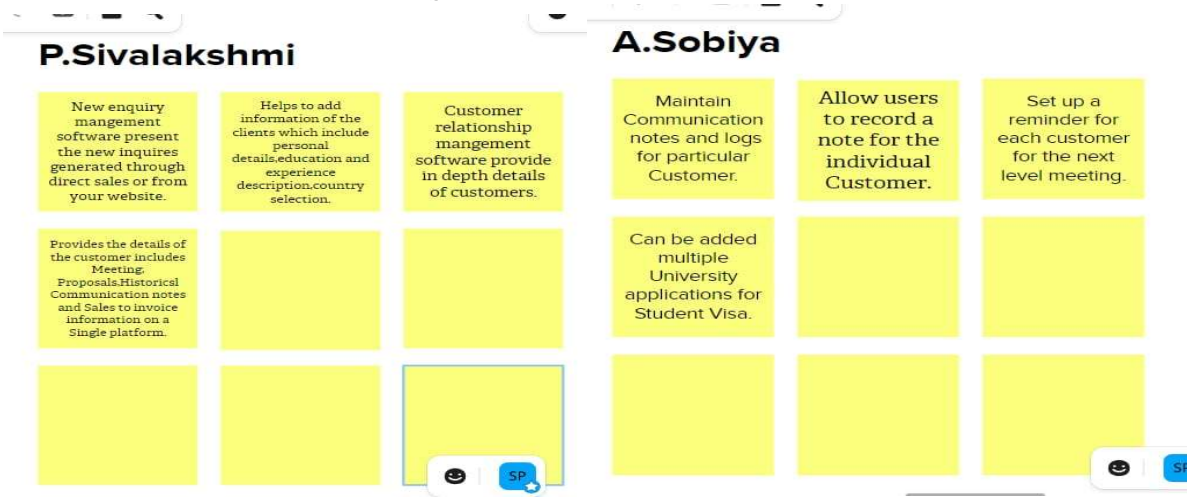
Feels

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



Ideation and Brainstorming map:





K.Srija

Email and Message marketing which helps you to update your customers with new rules and regulations of Immegration.

Easy Email template creation and selection option help you to send a message to different groups of customers.

Promotion Emails and Messages helps you to generate more leads and buisness.

K.Tamilarasi

Allow Counsellors to generate invoice and receipt for Customers online and secure.

Accounting Management enables you to find the invoice with the status of payment that is paid or unpaid.

Through all the facilities they can help the customers to fulfill their needs and taking charge to solve it.

Data Model:

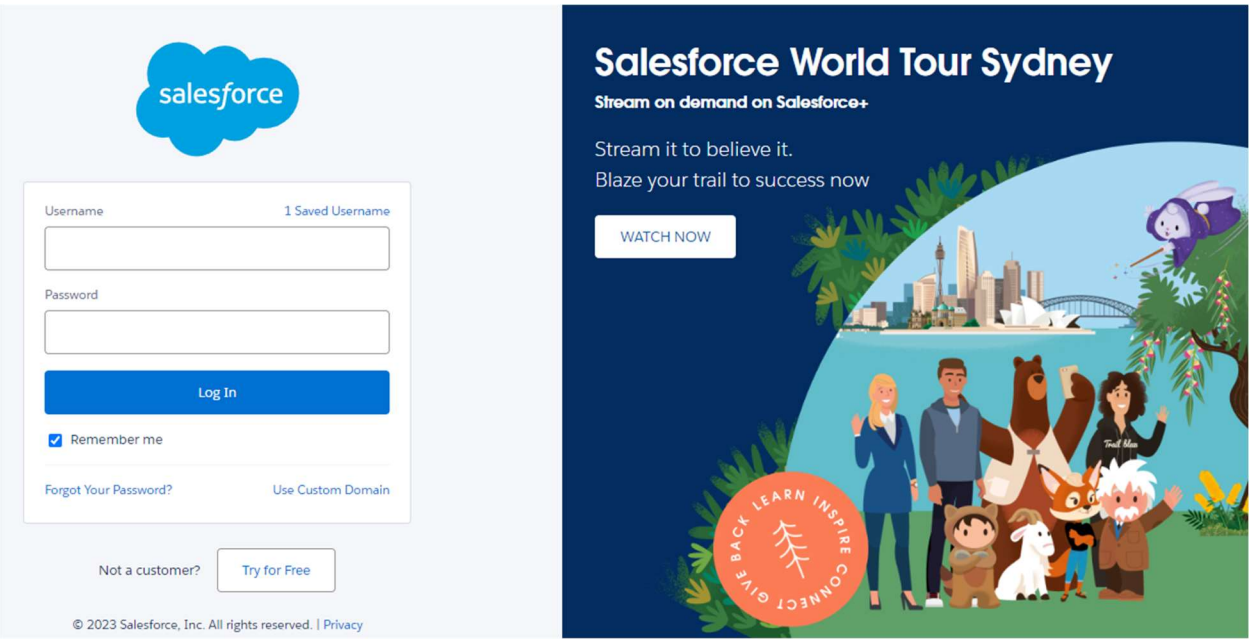
Objects	Passport	Visa Slot	Payment	Reschedule/cancel
Field and Data type	Full Name/Number	Location/ Text	Payment Mode/Text	Passport Number(master)/ Text
Field and Data type	Passport Number/ Number	Time/Number	Card Number/Text	Location/ Text
Field and Data type	Contact Number/Text	Passport Number(Master)/ Text	Transaction id (Auto Number)/ Number	Time/Number
Field and Data type	Permanent address/Text	Visa Slot number/ Number	Cancel Transaction/ Text	Cancel/ Text
Field and Data type	___	___	Visa Slot Number(master)/Text	Status/ Text

ACTIVITY AND SCREENSHOTS

1. Creation of Salesforce platform:

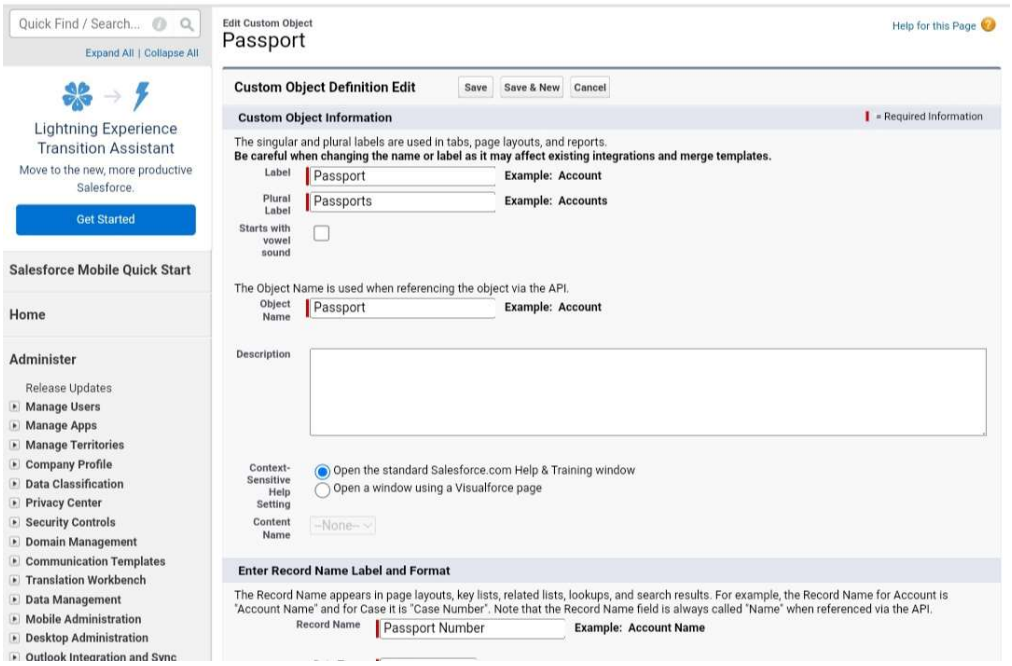
Go to Developer.salesforce.com and click on sign up. Enter our Detail as name, Email, Role, Company etc., Email is send your mail Id.

Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account.



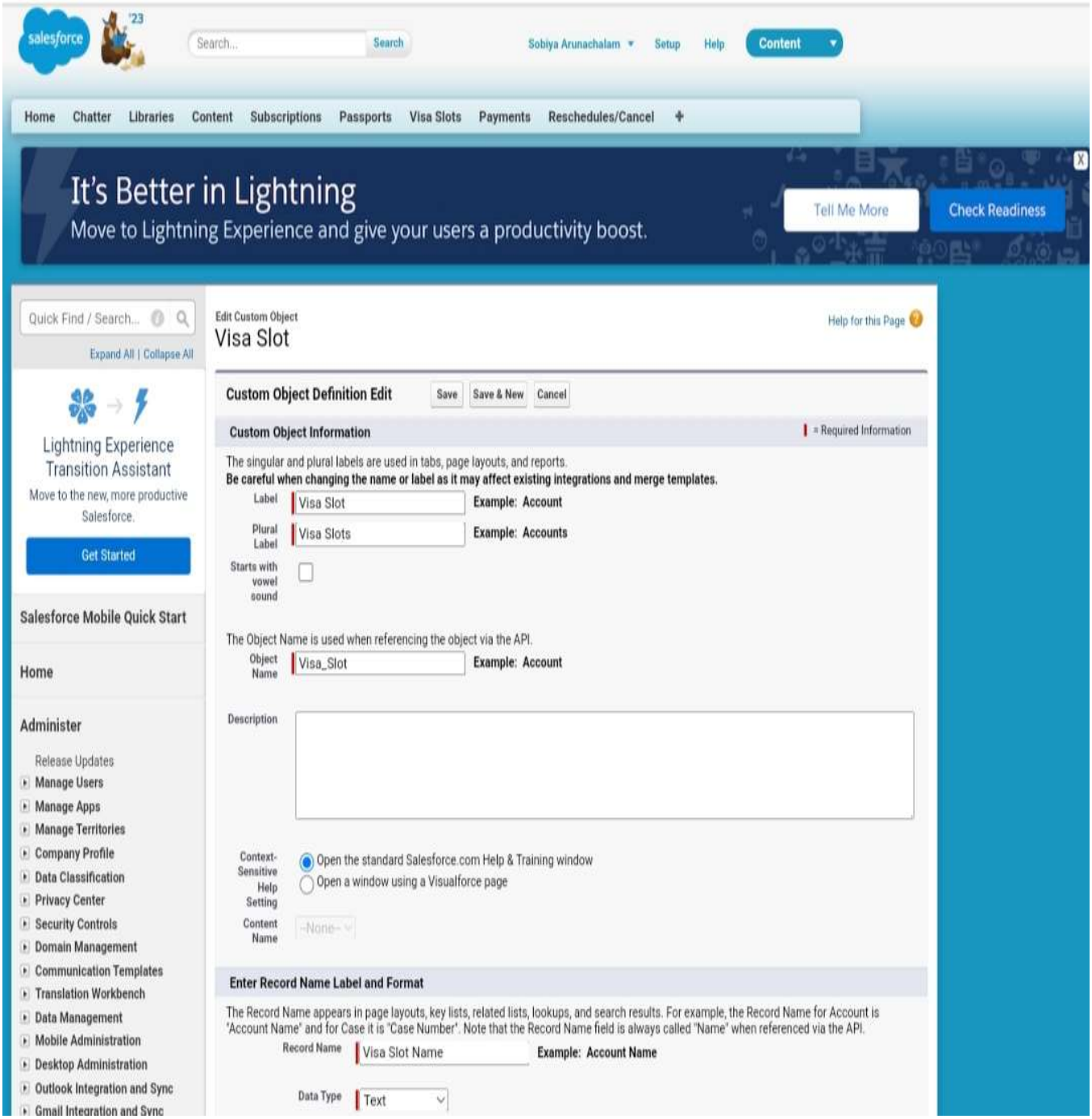
2. Creation of custom object: Passport

Navigate to setup to select the object manager and create the object gives the detail like label name has Passport and enter the plural name, record name, data type, ect. and save it.

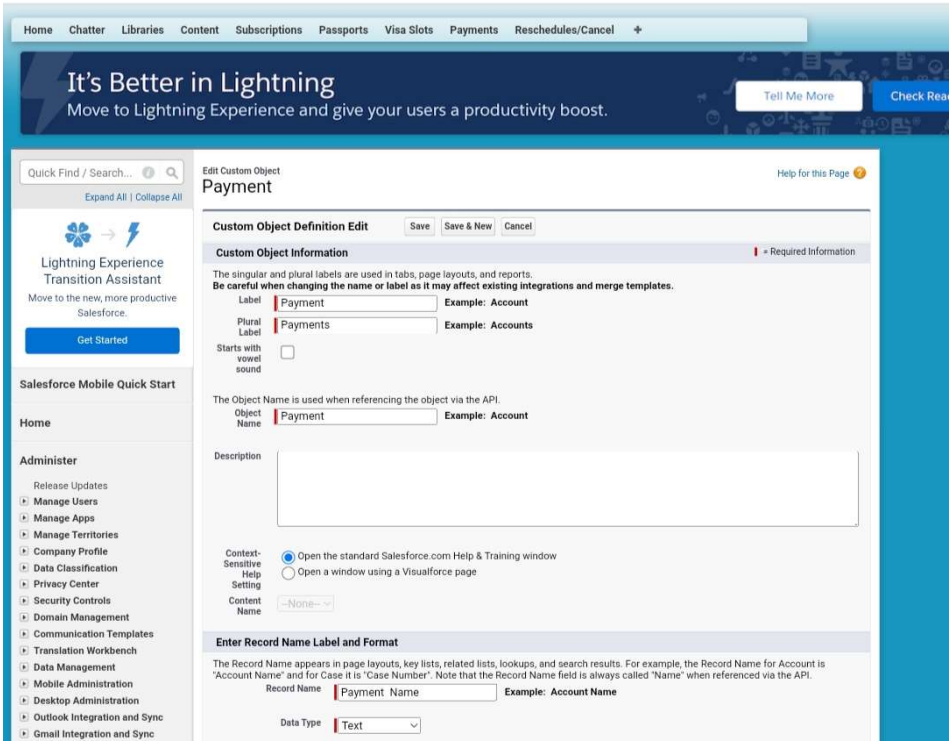


Objects involved in Book a visa are Visa Slot, Payment, Reschedule/Cancel create in this type.

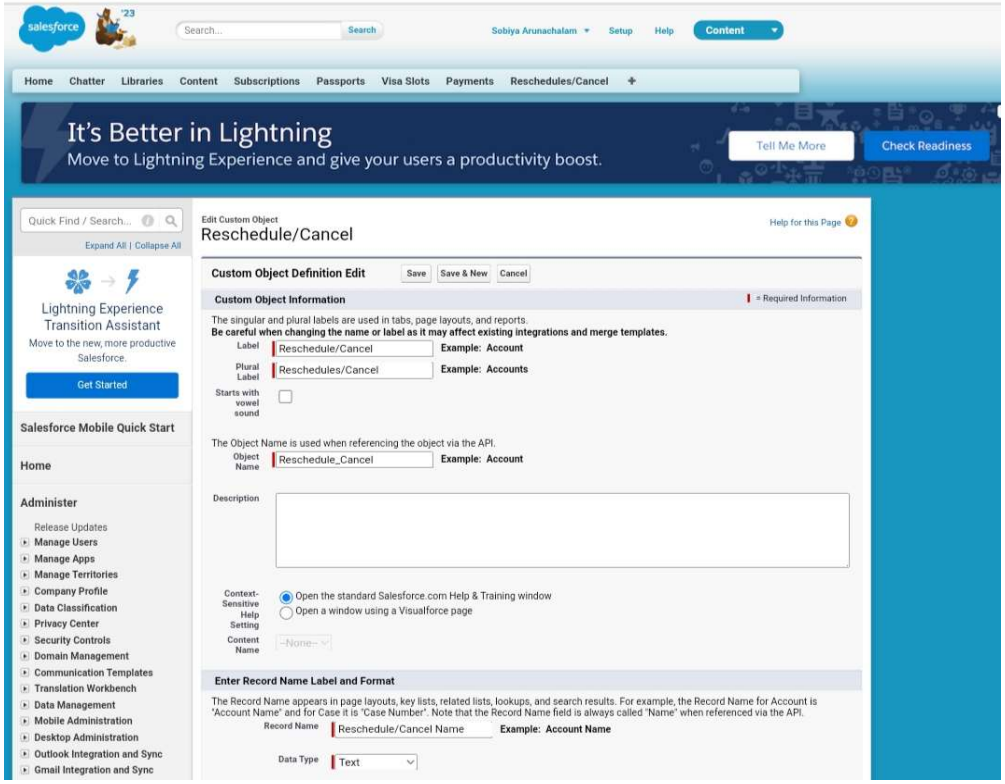
Visa Slot:



Payment:



Reschedule/Cancel:

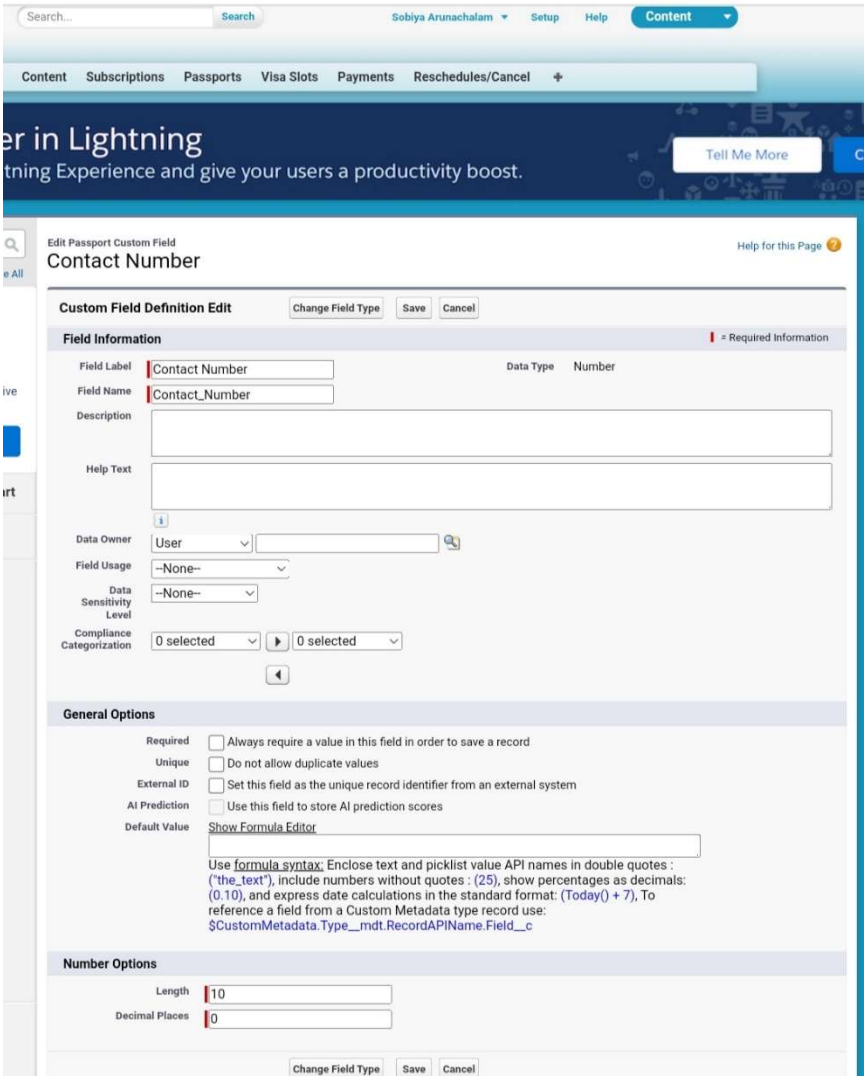


Create of Field on custom Object:

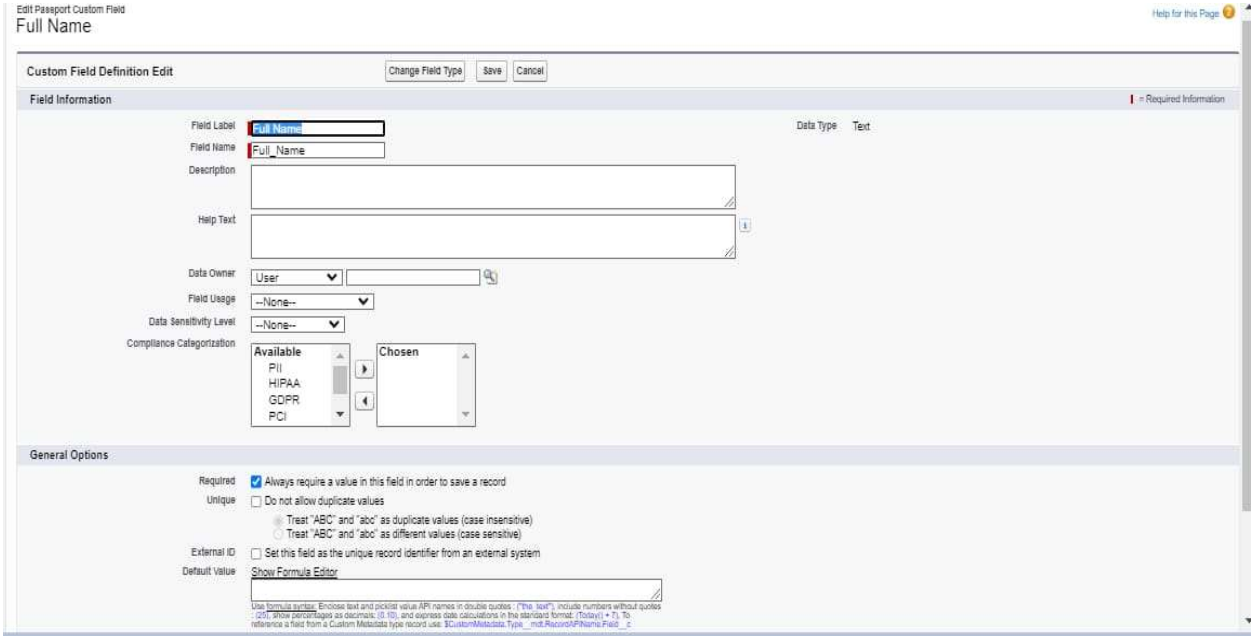
Passport:

Select our Object from the selection has Passport and select option field and Relationship. Select our data type as number go to the next page enter the field label has Contact Number and length should be 10 and you can find options like required, unique, external id select required option so that always require a value in this field in order to save. Go to next page on visible checkbox so that it is visible to all profile and select option and save it. The passport Field are create like this type.

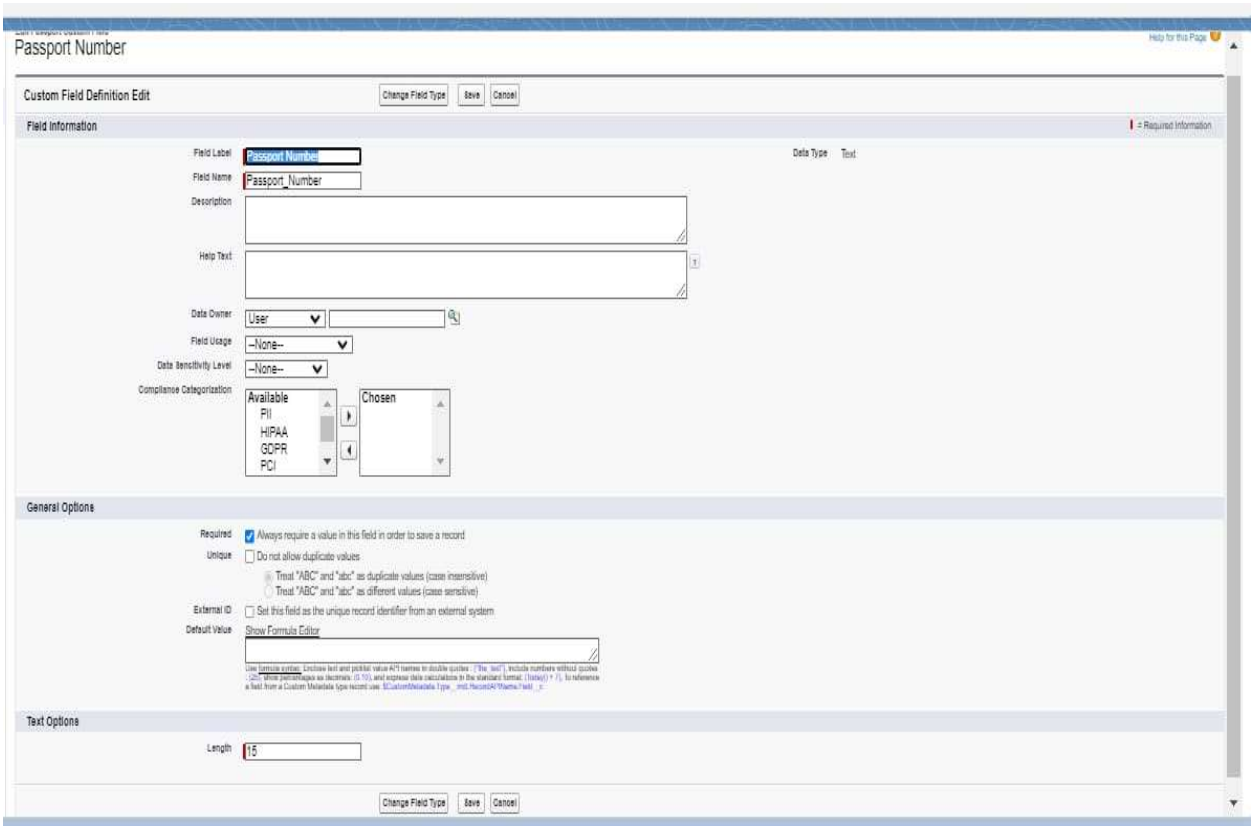
Contact number:



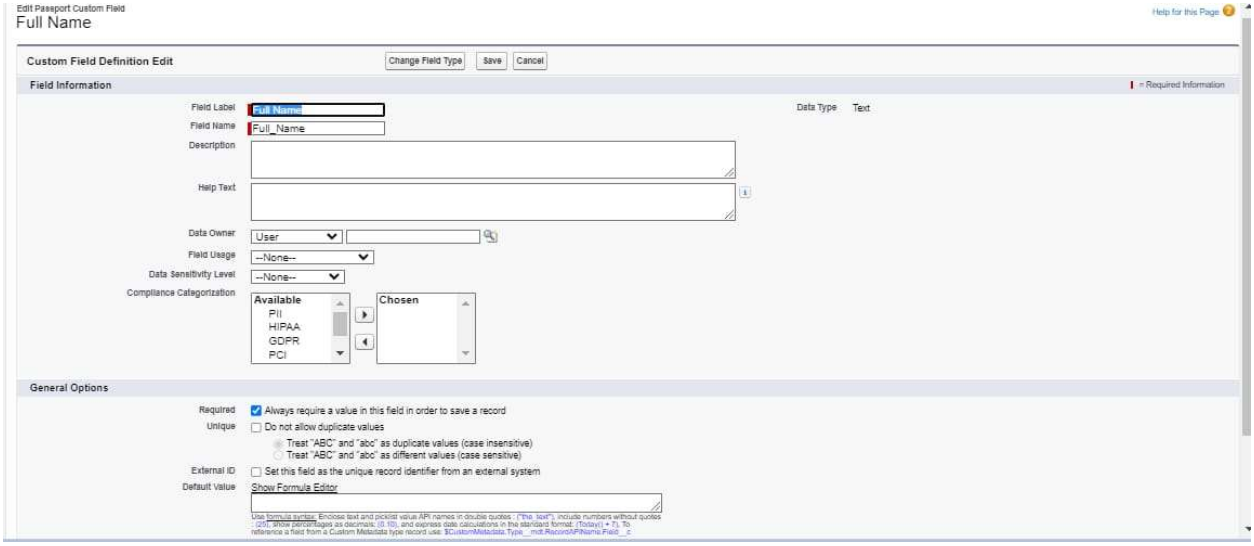
Full name:



Passport Number:

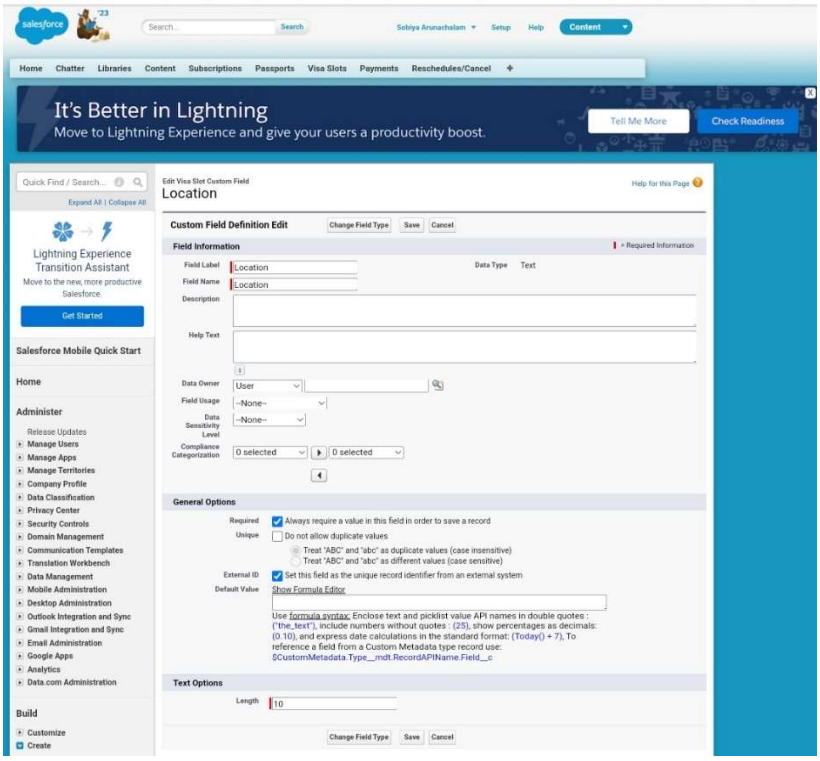


Permanent Adress:



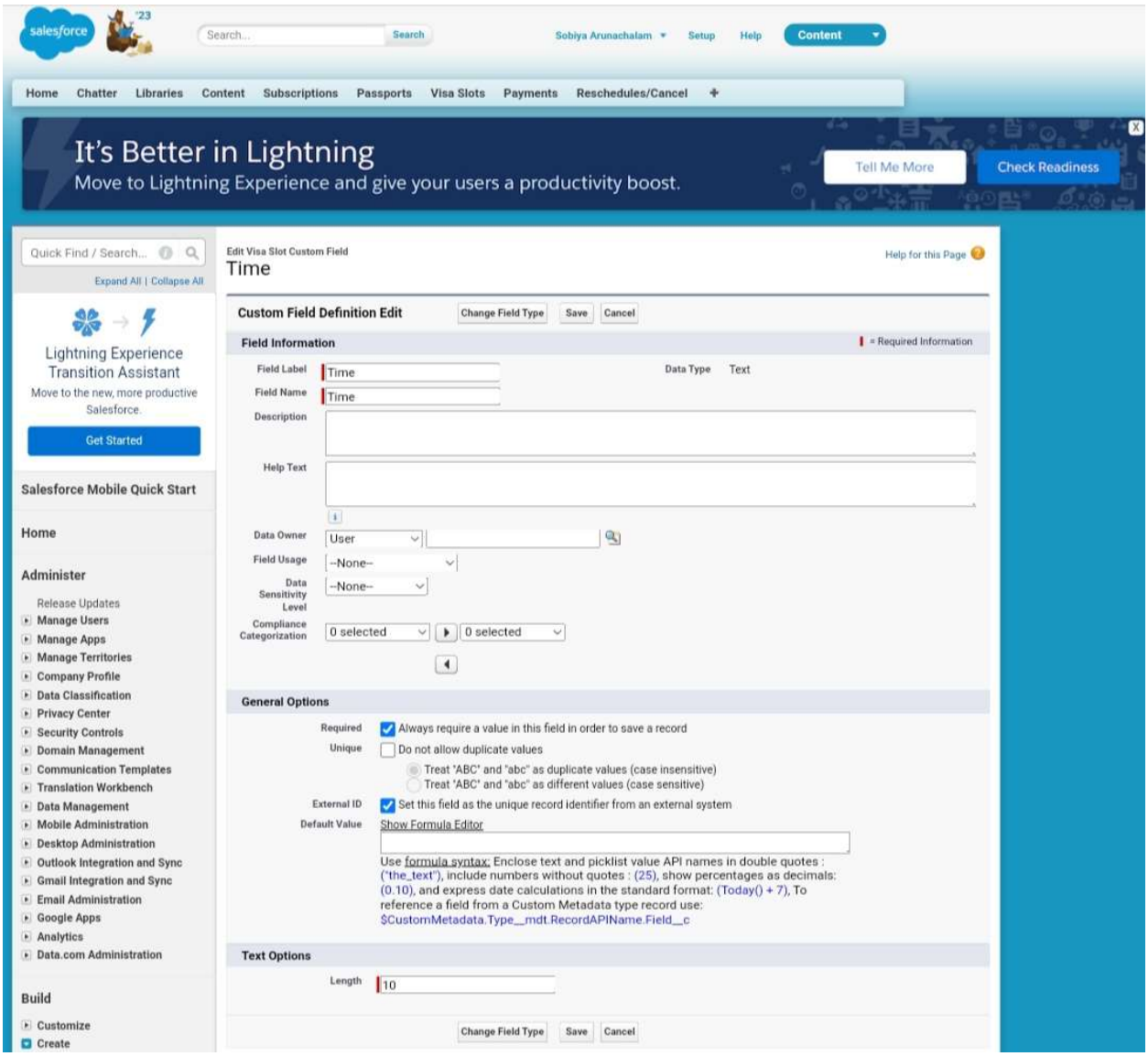
Creation of fields on the custom Object: Visa Slot

Location:

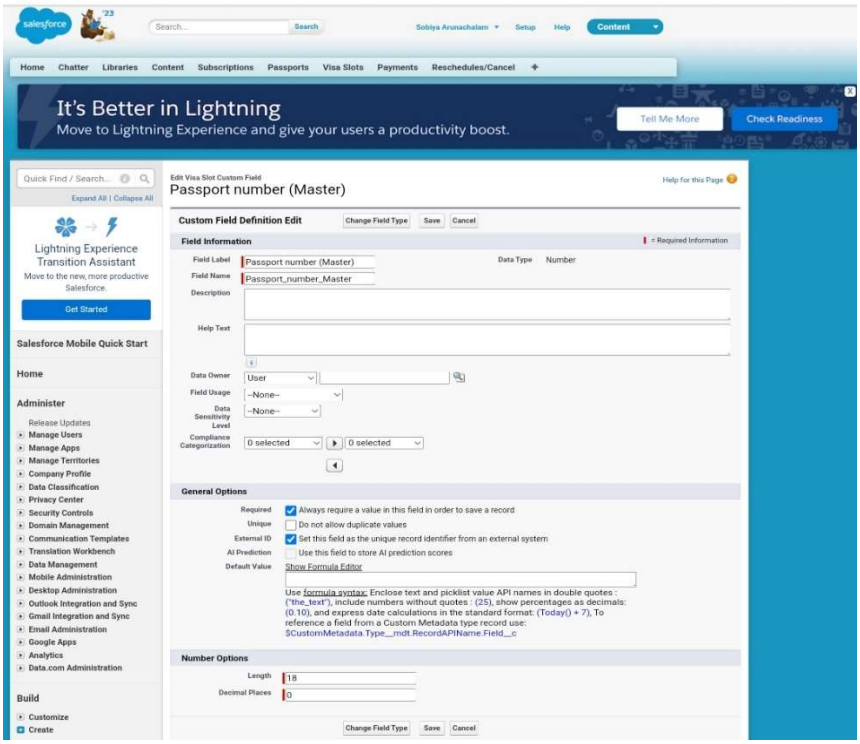


Select our Object from the selection has Passport and select option field and Relationship. Select our data type as text go to the next page enter the field label has Location and length should be 10 and you can find options like required, unique, external id select required option so that always require a value in this field in order to save. Go to next page on visible checkbox so that it is visible to all profile and select option and save it. The visa slot Field are create like this type.

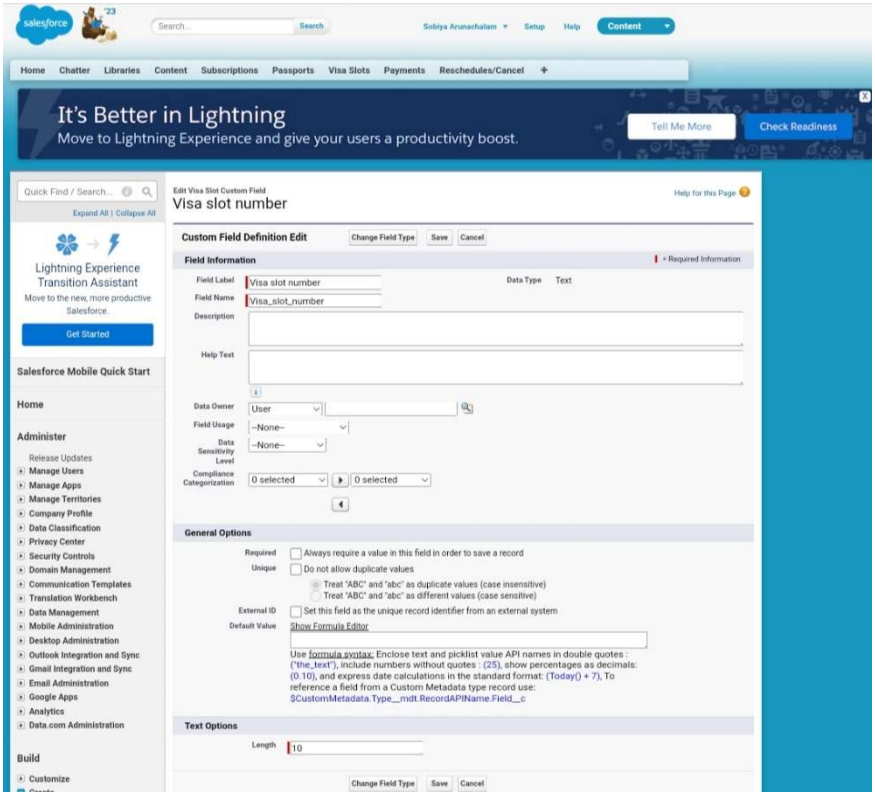
Time



Passport Number(master):



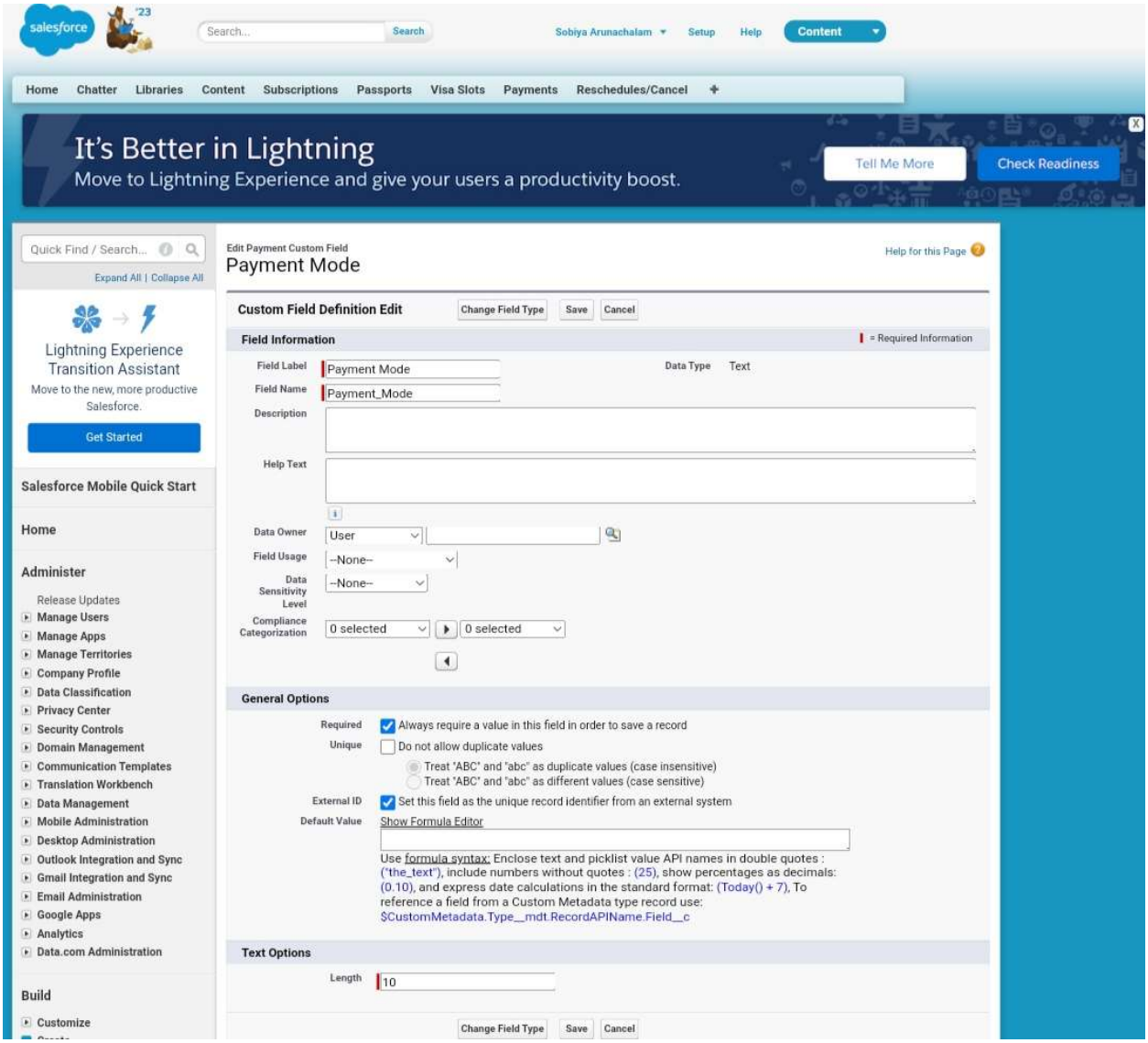
Visa slot number:



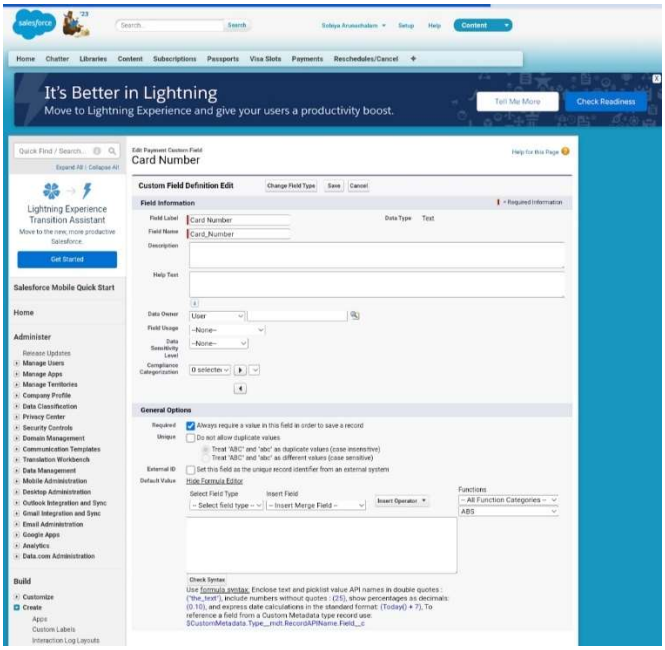
Creation of Field on custom Object: Payment

Select our Object from the selection has Passport and select option field and Relationship. Select our data type as text go to the next page enter the field label has Payment Mode and length should be 10 and you can find options like required, unique, external id select required option so that always require a value in this field in order to save. Go to next page on visible checkbox so that it is visible to all profile and select option and save it. The payment Field are create like this type.

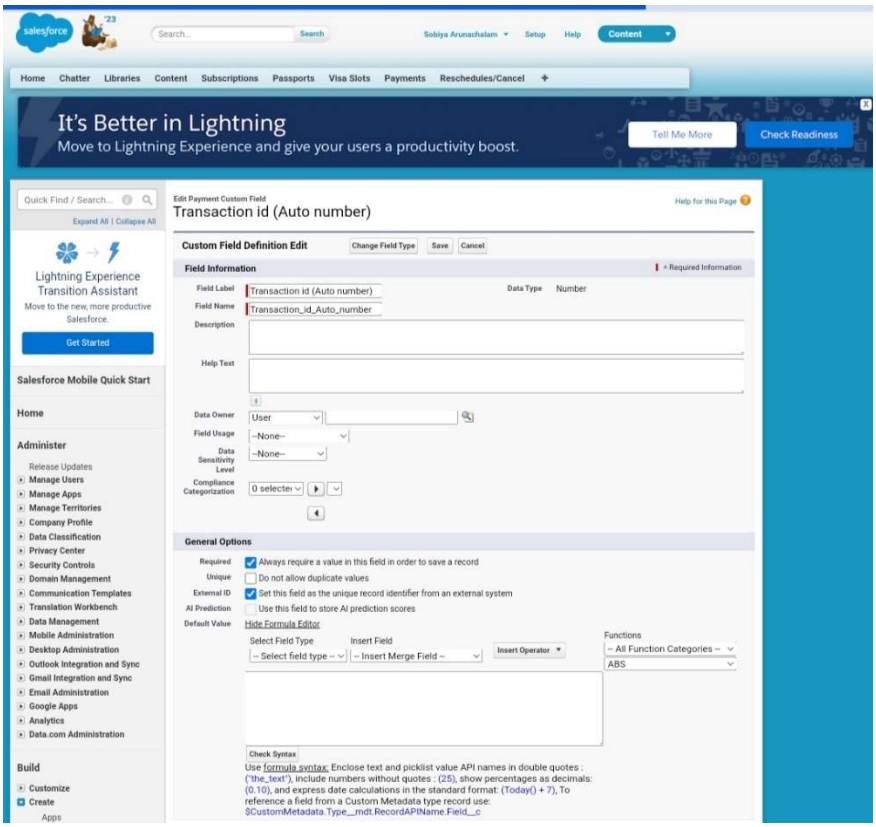
Payment Mode:



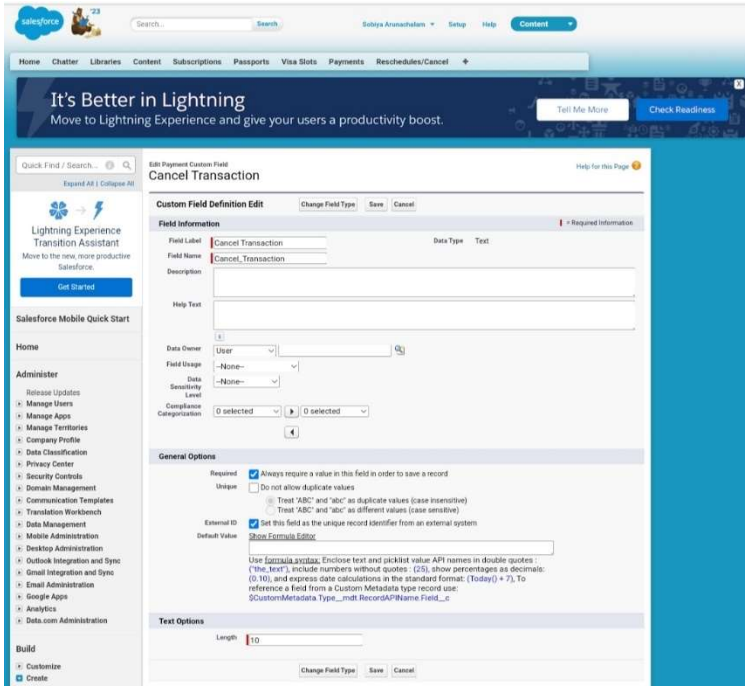
Card Number:



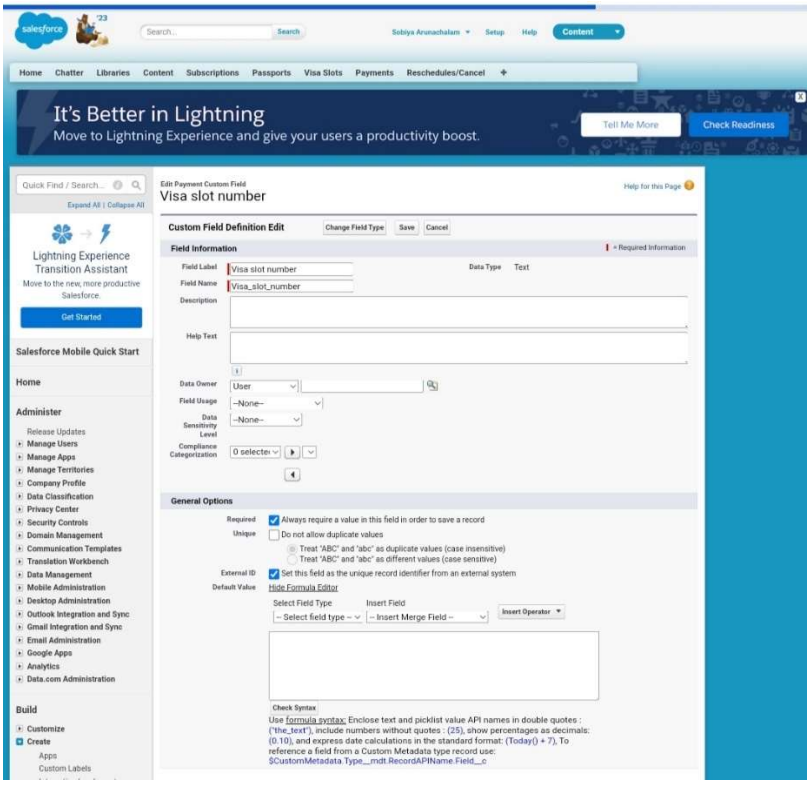
Transaction id(Auto number):



Cancel transaction:



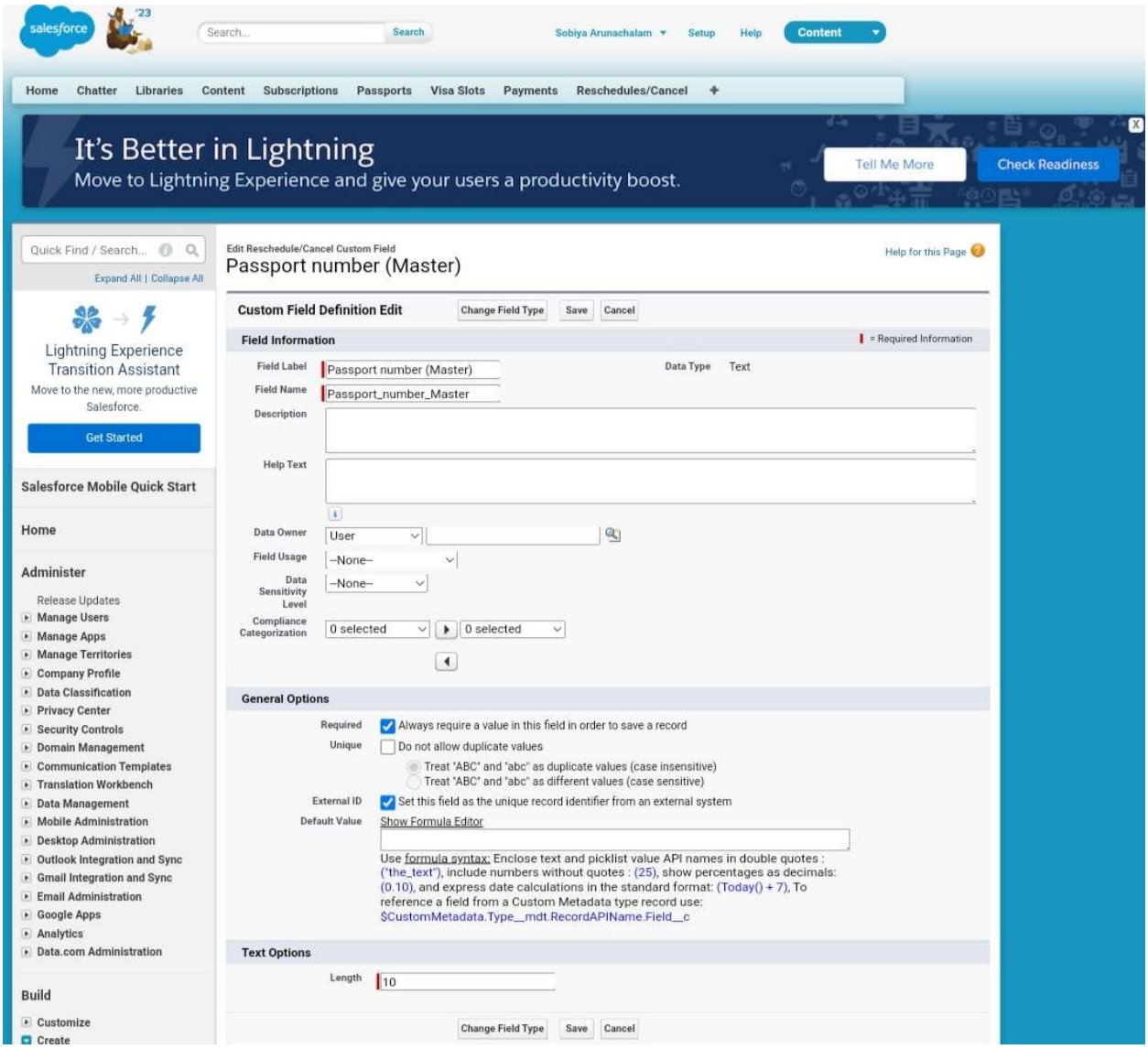
Visa slot number(master)



Creation of field on custom Object: Reschedule/cancel

Passport number(Master):

Select our Object from the selection has Reschedule/cancel and select option field and Relationship. Select our data type as number go to the next page enter the field label has passport Number(master) and length should be 10 and you can find options like required, unique, external id select required option so that always require a value in this field in order to save. Go to next page on visible checkbox so that it is visible to all profile and select option and save it. The Reschedule/cancel Field are create like this type.


salesforce
Search...
Search
Sobiya Arunachalam
Setup
Help
Content
Home
Chatter
Libraries
Content
Subscriptions
Passports
Visa Slots
Payments
Reschedules/Cancel
It's Better in Lightning
Move to Lightning Experience and give your users a productivity boost.
Tell Me More
Check Readiness
Quick Find / Search...
Expand All | Collapse All
Lightning Experience Transition Assistant
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Get Started
Salesforce Mobile Quick Start
Home
Administer
Release Updates
Manage Users
Manage Apps
Manage Territories
Company Profile
Data Classification
Privacy Center
Security Controls
Domain Management
Communication Templates
Translation Workbench
Data Management
Mobile Administration
Desktop Administration
Outlook Integration and Sync
Gmail Integration and Sync
Email Administration
Google Apps
Analytics
Data.com Administration
Build
Customize
Create
Edit Reschedule/Cancel Custom Field
Passport number (Master)
Help for this Page
Custom Field Definition Edit
Change Field Type
Save
Cancel
Field Information
= Required Information
Field Label
Passport number (Master)
Data Type
Text
Field Name
Passport_number_Master
Description
Help Text
Data Owner
User
Field Usage
--None--
Data Sensitivity Level
--None--
Compliance Categorization
0 selected
0 selected
General Options
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)
Treat "ABC" and "abc" as different values (case sensitive)
External ID
Set this field as the unique record identifier from an external system
Default Value
Show Formula Editor
Use formula syntax: Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7), To reference a field from a Custom Metadata type record use: $CustomMetadata.Type__mdt.RecordAPIName.Field__c
Text Options
Length
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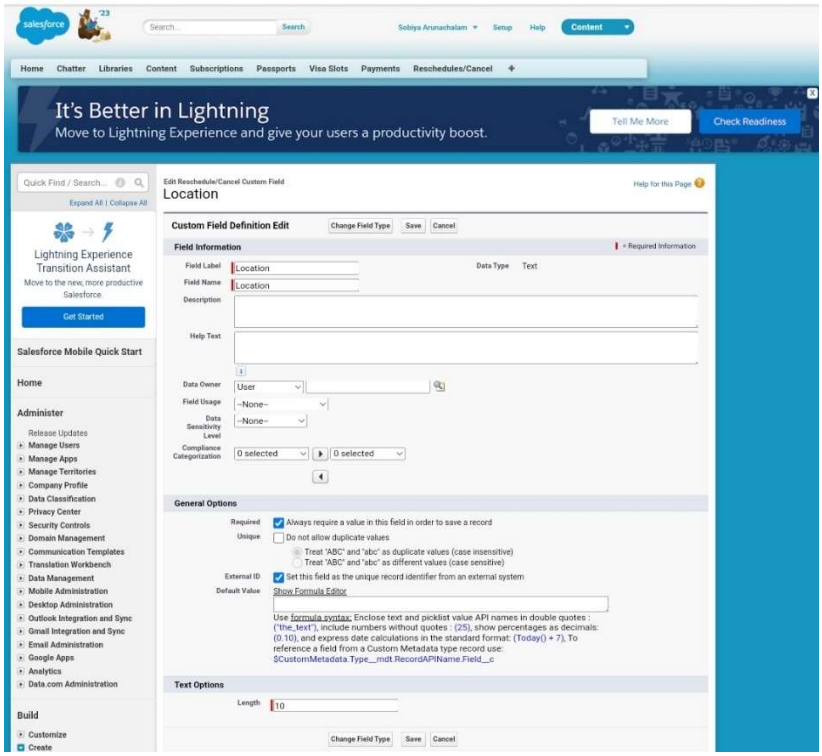
Change Field Type
Save
Cancel

Location: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Manage Territories
Company Profile
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Communication Templates
Translation Workbench
Data Management
Mobile Administration
Desktop Administration
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Gmail Integration and Sync
Email Administration
Google Apps
Analytics
Data.com Administration
Build
Customize
Create
Edit Reschedule/Cancel Custom Field
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Cancel
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Data Type
Text
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Text Options
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Change Field Type
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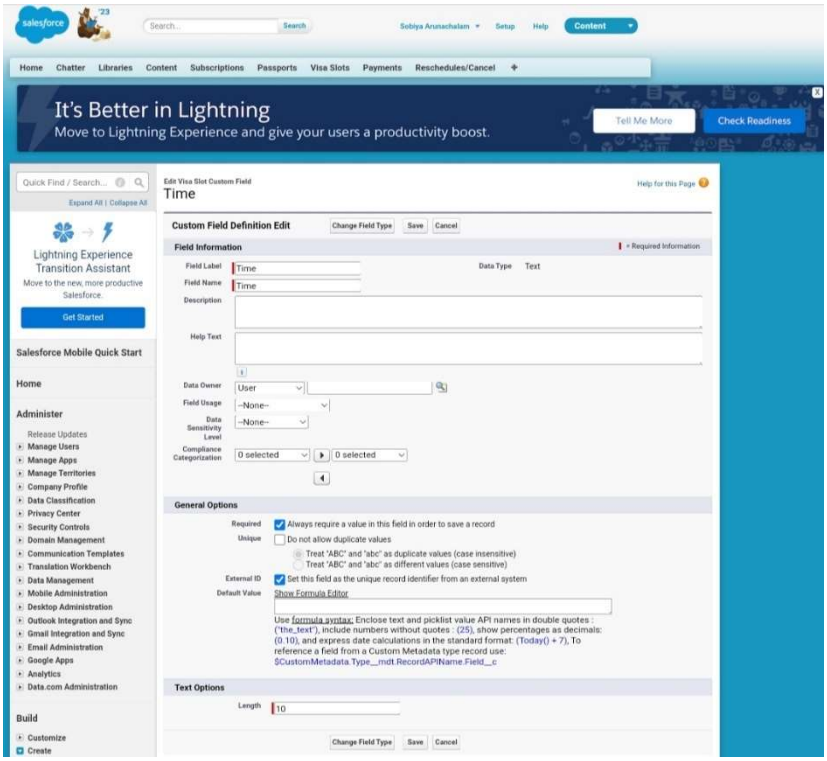
Time: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Security Controls
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Communication Templates
Translation Workbench
Data Management
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Outlook Integration and Sync
Gmail Integration and Sync
Email Administration
Google Apps
Analytics
Data.com Administration
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Edit Visa Slot Custom Field
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Custom Field Definition Edit
Change Field Type
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Text
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Text Options
Length
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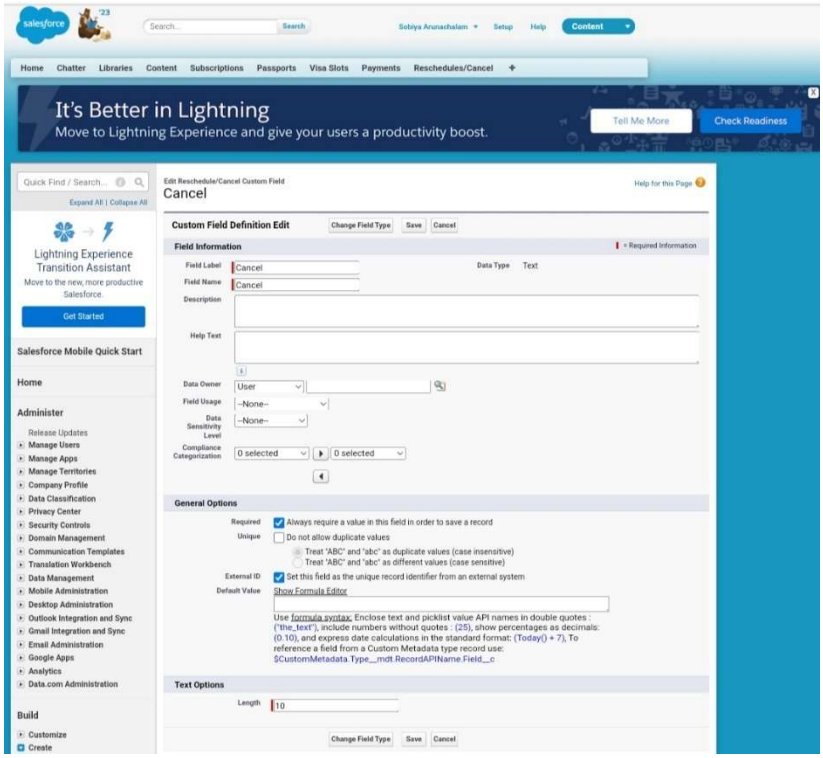
Change Field Type
Save
Cancel

Cancel: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Cancel
Custom Field Definition Edit
Field Information
Field Label
Cancel
Field Name
Cancel
Data Type
Text
General Options
Text Options
Length
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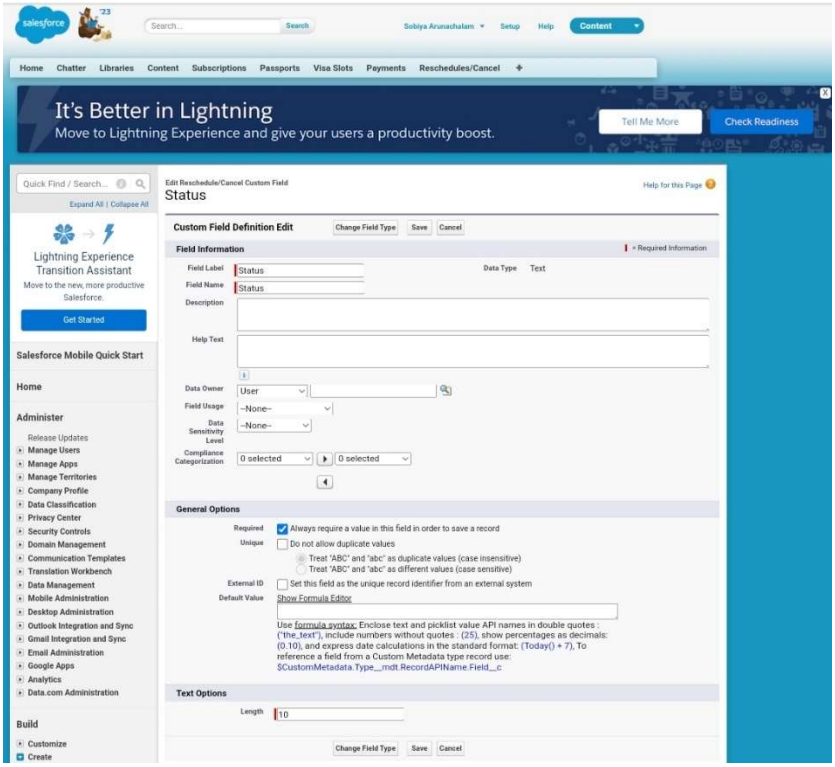
Status: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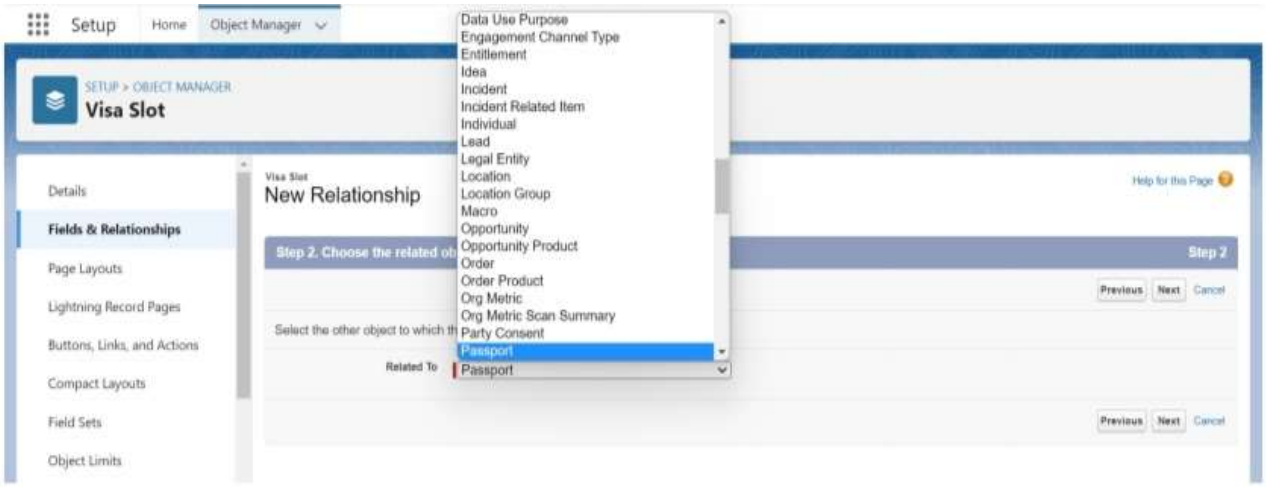
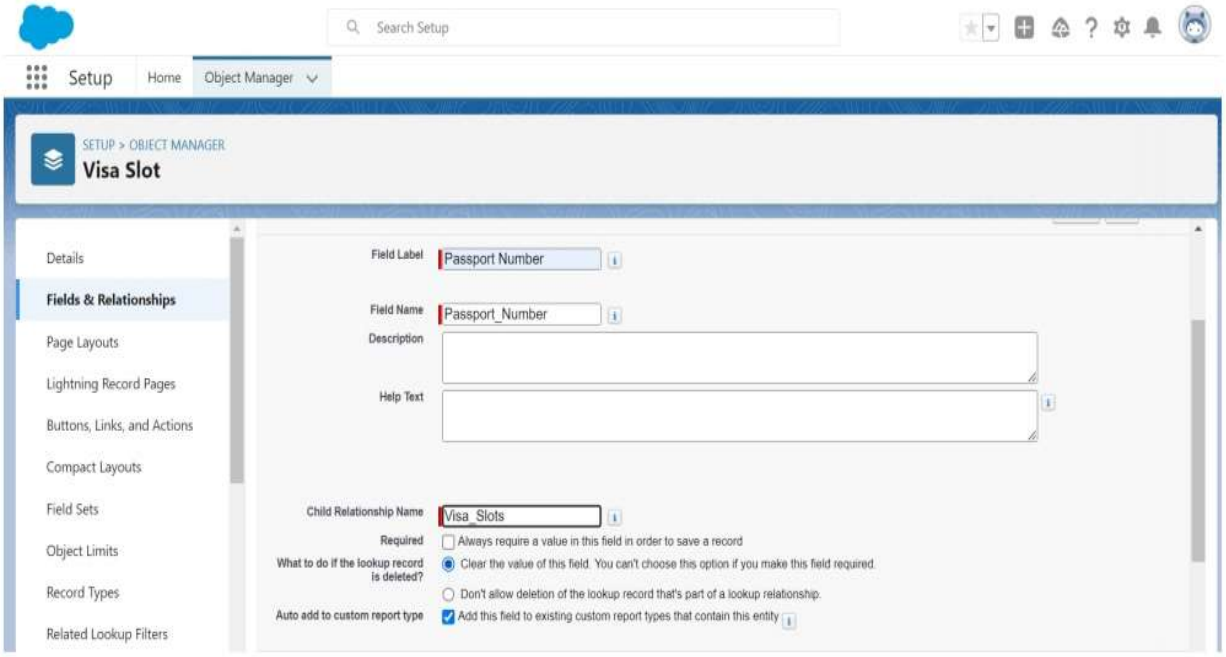
Check Readiness
Edit Reschedule/Cancel Custom Field
Status
Custom Field Definition Edit
Field Information
Field Label
Status
Field Name
Status
Data Type
Text
General Options
Text Options
Length
10

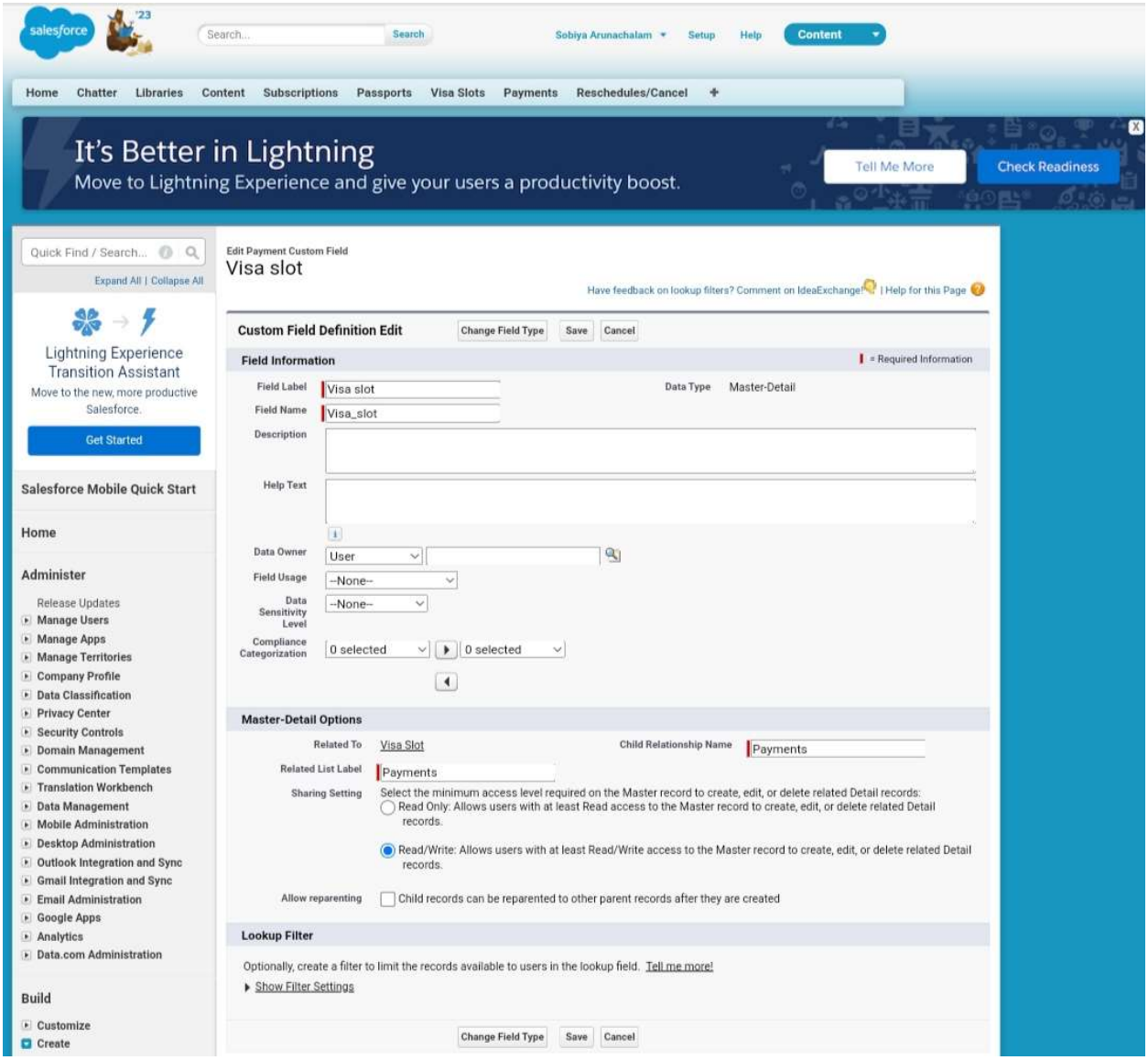
3. <u>Creation of Relationship</u>: Relationship between Objects

To create a Mater Detail relationship between Passport and visa. Select the object manager Visa Slot object from the list and select the Filed and relationship and click new. The data type has Master detail relationship and go to the next page and save it. To create the relationship between payment and visa slot in this type.



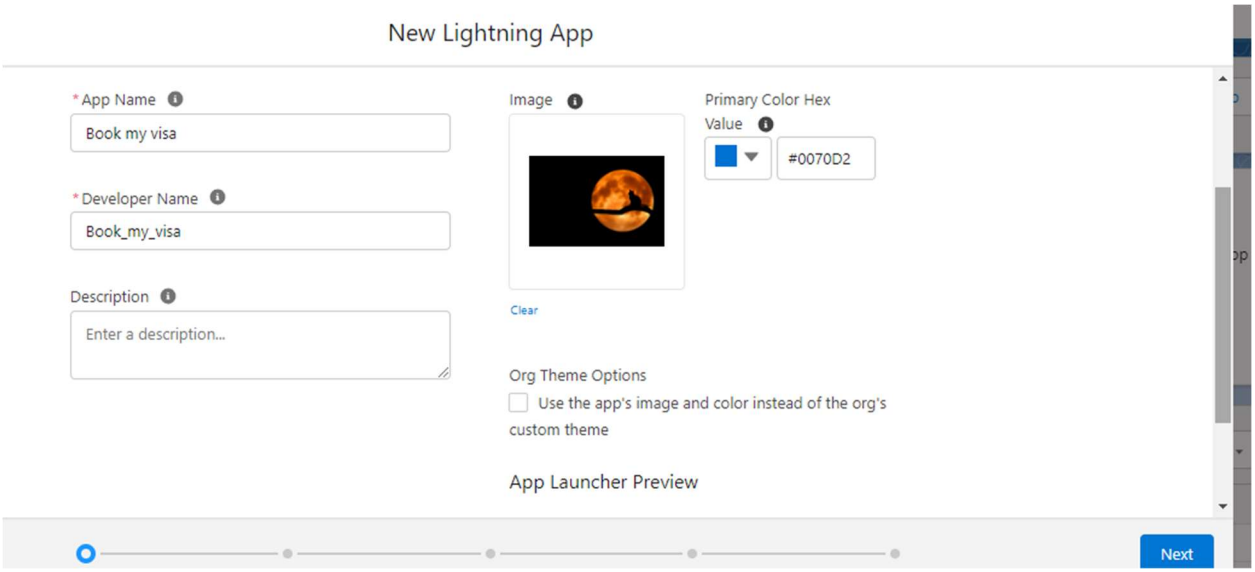


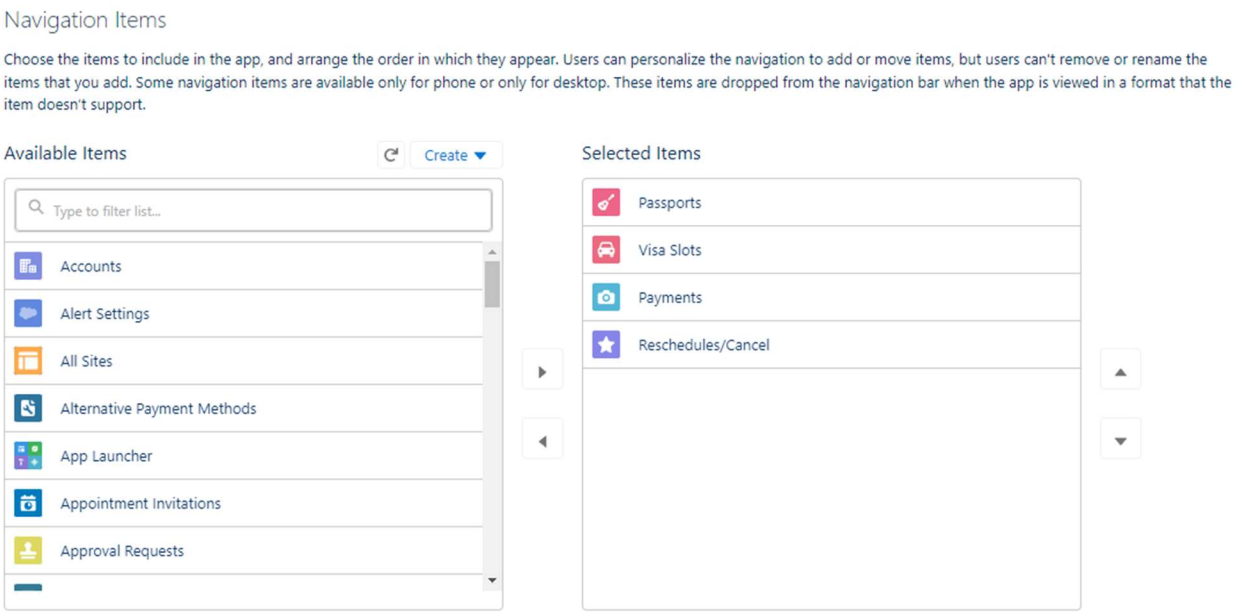
Master Detail relationship between payment and Visa:



4. <u>Creation of app:</u>

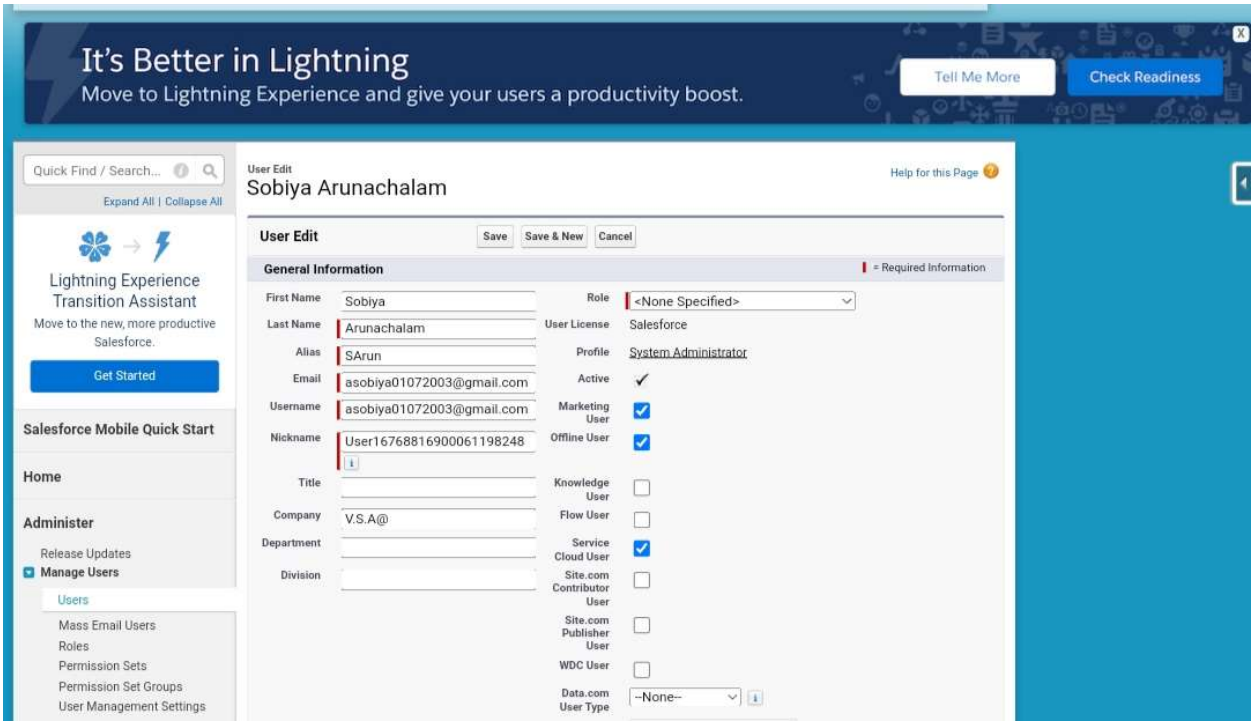
Navigate to setup and search for app manager. To select the new lighting app option and give the app name has book my visa and upload the picture, click next. Choose the navigation style click the next page move the objects from available items to selected items. And select the admin profile, save it.





5. Creation of user:

Navigate to setup in quick find Search bar, search in user and select it. Give the first name and last name. Enter your email and enter your username. Select your user license of salesforce. The profile field is standard user. At bottom of the page check the box to generate a new password and save the page.



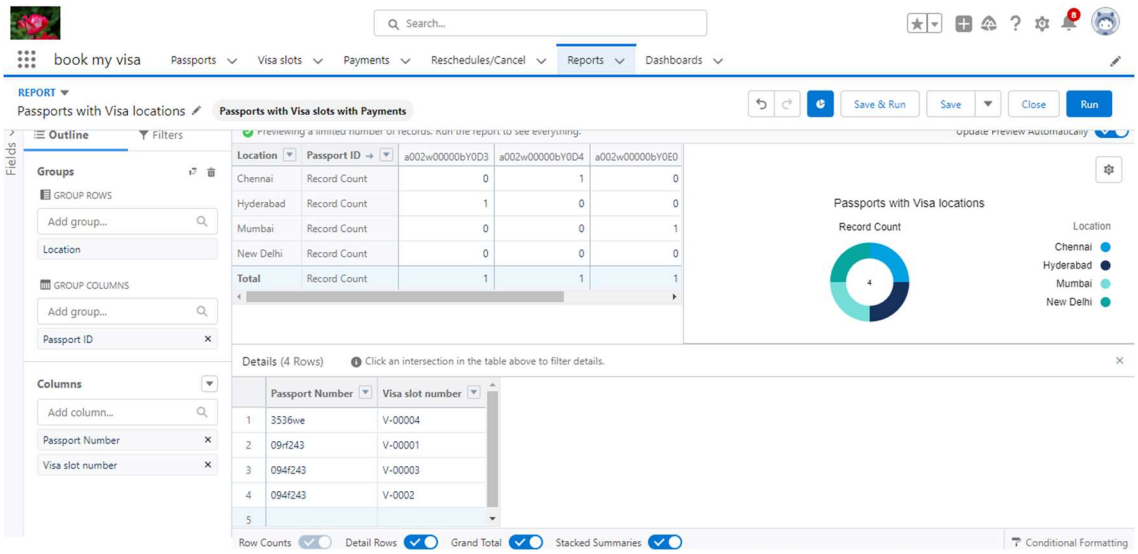
OWD: Organization wide default settings

This can be used to gives permissions to the organization wide and it can be used for restrict the access, we can control the record level access.

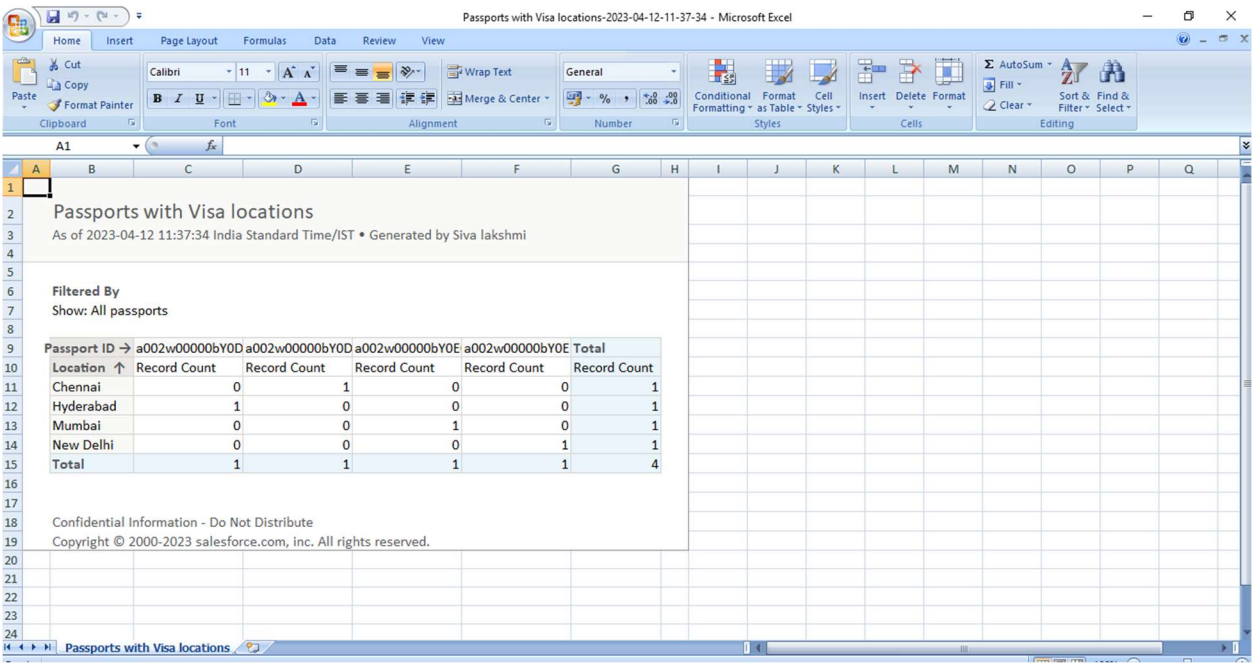
Go to the setup to find out the sharing setting select it. Edit the organization -wide Default and Select the passport and change the default external access to Public/Read/write.

6. Create a Report

Click the app launcher and search for Book a visa. Select the report and click new report select the report type as passport with visa slot with payment and select start report. Left side of the report you can find the outline pane. In the group row select location and group column select passport:passport number to display and add the column select has visa slot number.

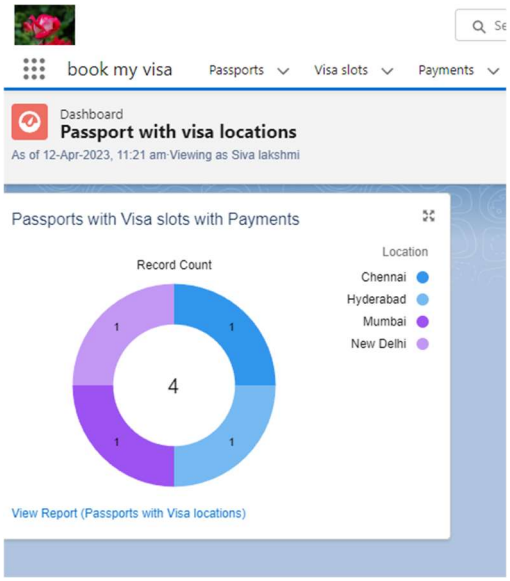


Edit the filters as show me select all passport and passport created date select all time finally save and run it. Go to the edit option and click export select excel sheet format and click export. We can see the detail in the excel sheet as shown.

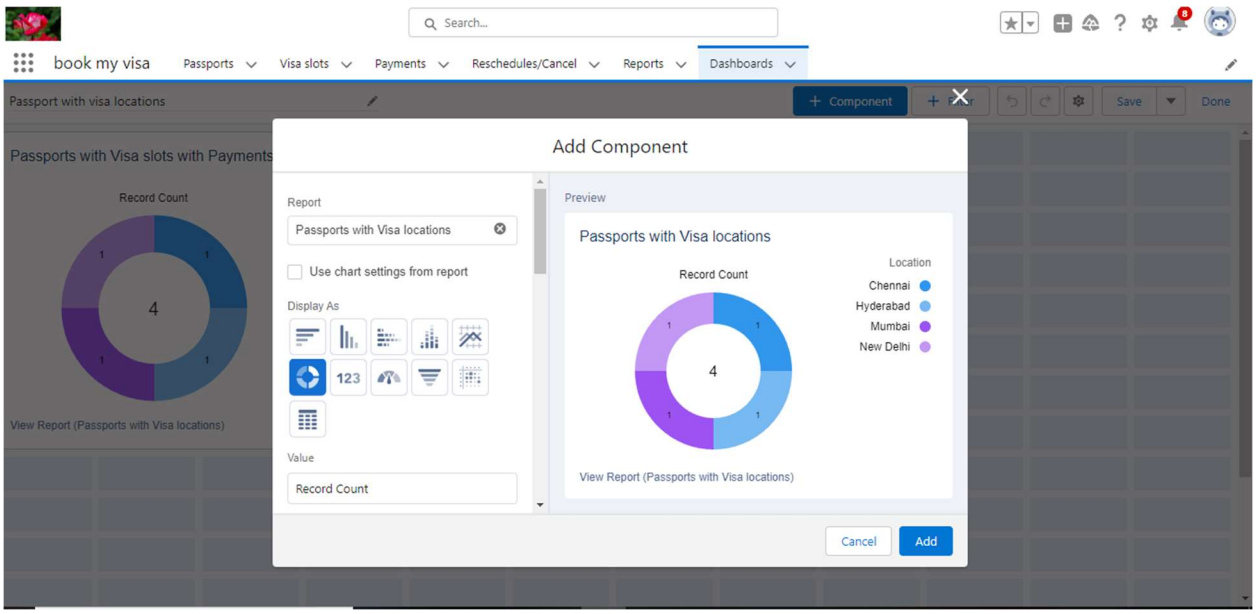


7. Create a Dashboard

Go to the app launcher and search for Book a visa. Select the dashboard and click new dashboard. Click Add Component and report select passport with locations.



Select the donut chart as selection. Ensure the value is record count and sliced by locations. Click add and save the dashboard.



TRAILHEAD PROFILE PUBLIC URL:

Team leader : P. Sivalakshmi : https://trailblazer.me/id/slakshmi293

Team member : A. Sobiya : https://trailblazer.me/id/sobiyaa1

Team member : K. Srija : https://trailblazer.me/id/skannan100

Team member : K. Tamilarasi : https://trailblazer.me/id/tamik31

Advantages:

- Processing is fast.
- Saving time.
- No wandering.
- Not much paper work.
- Easiest way.

Disadvantages:

- Internet connection problem is there.
- Poor connection leads to trouble and anxiety.
- Poor communication.
- Lack of leadership.
- Burdensome data entry.
- Can be costly.

Applications:

This will help you to track and manage the availability of visa slot, which are appointments that are required for certain Visa applications.

CRM is a well conceived business strategy with long term outcomes that maximize profitability, revenue and customer satisfaction by organising around customer segment, fostering customer satisfying actions and implementing customer centric process.

CRM is a strategy employed to learn and understand customer's needs, wants and behaviour in order to develop stronger and sustained relationship with them.

Conclusion:

By using the CRM application, we should track and manage the availability of Visa slots easily. Booking of visa slots will be in an easier way.

It is a beneficial and useful one for the customers. Save the time and often visiting trouble is not there.

Future Scope:

- ✓ In future, it will be really a useful app and application in booking a Visa Slot.
- ✓ It is trusted to be in future, everyone will utilize this.
- ✓ The customer will set good service and make it trust worthy.
- ✓ Hope, it would fulfil all the needs of the users.