



**DR.M.G.R.GOVERNMENT ARTS AND SCIENCE COLLEGE  
FOR WOMEN  
UG DEPARTMENT OF MATHEMEATICS  
NAAN MUDHALVAN PROJECT**

**CRM APPLICATIONS THAT HELPS TO BOOK A VISA SLOT**

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

## **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.

Organizations are constantly striving to meet and exceed the needs of their customers. Furthermore, it has become increasingly important to provide a good customer experience in all interactions with the company. With the help of information technology (IT), the organizations have started to use information systems (IS) to track their customer data and interactions. The concept has been named customer relationship management.

This paper takes a pragmatic approach to provide a mapping between the needs of an organization and the characteristics of CRM systems. These problems have forced the industry to start looking for solutions to ensure the success of CRM initiatives and avoid costly failures. The structure of the thesis builds on the methodology presented in further milestones.

## 1.2 PURPOSE

You can book your US embassy visa appointment using our bar code and fee receipt. Once you are done booking your US student visa appointment, you need to start with an F-1 visa slot booking for the VAC (biometrics: photograph + fingerprint) at least a day before the interview.

### ❖ SALESFORCE ECOSYSTEM

- ✓ Trailhead and Trailblazer
- ✓ Community
- ✓ Salesforce customer 360
- ✓ Trailhead playground management
- ✓ Salesforce trust site
- ✓ Salesforce Help

### ❖ NAVIGATION

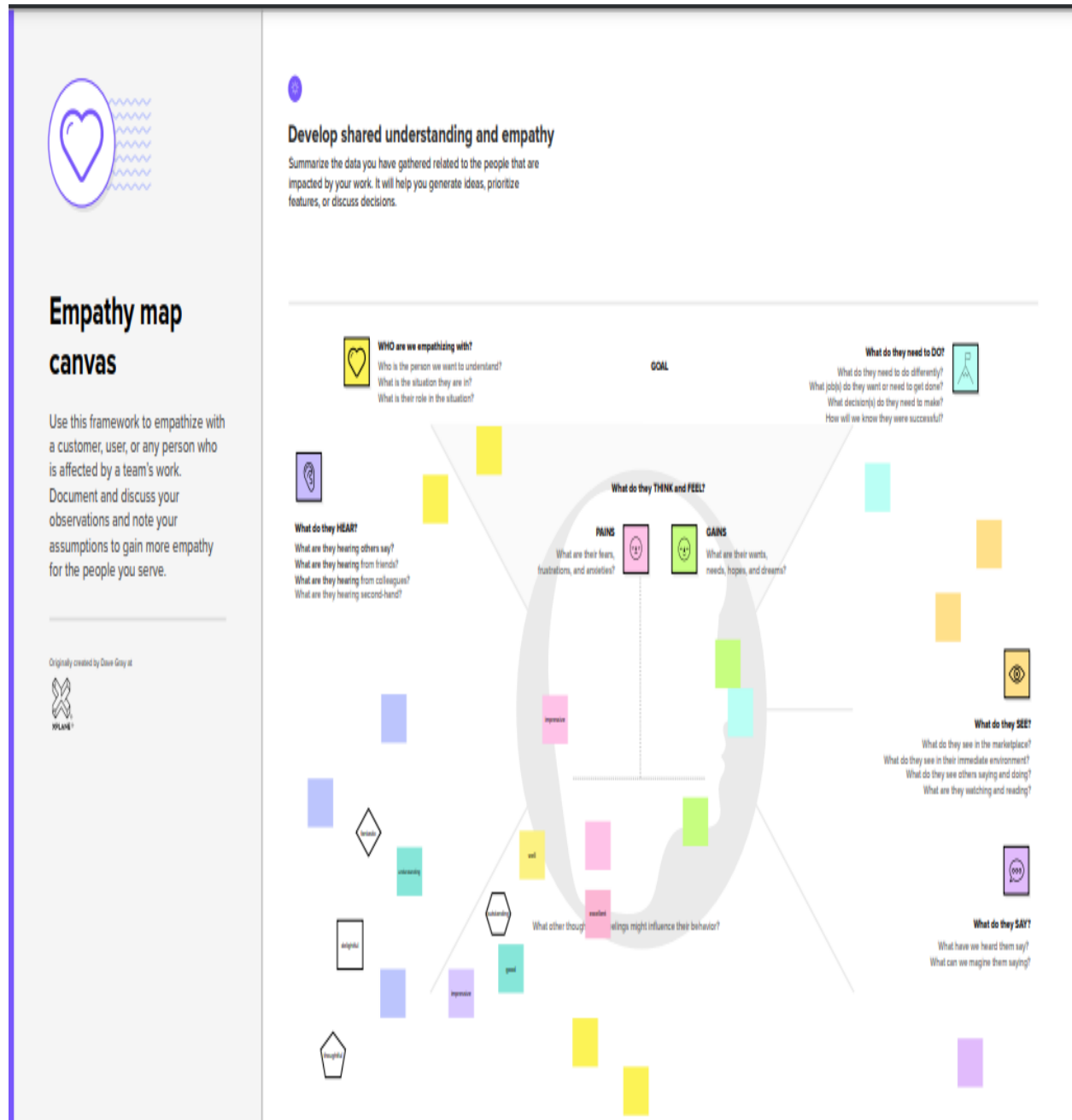
- ✓ Accounts and contacts for Lightning Experience
- ✓ App Exchange Basics
- ✓ Search solution Basics
- ✓ Salesforce CRM
- ✓ Lightning App Build
- ✓ User Management

### ❖ DATA MODEL

- ✓ Data Modeling
- ✓ Data security
- ✓ Perfect your data in salesforce
- ✓ Customize a Salesforce Object
- ✓ Permission Set Groups
- ✓ Picklist Administration

## 2 PROBLEM DEFINITION & DESIGN THINKING

### 2.1 EMPATHY MAP



The image displays a collection of digital templates for brainstorming and idea prioritization. The main template, titled 'Brainstorm & idea prioritization', is a large grid with columns for 'Idea', 'Value', 'Effort', and 'Impact'. It includes a 'Brainstorm' section with a list of ideas and a 'Prioritization' section with a grid for ranking ideas. Other templates include 'Group idea', 'Brainstorming', and 'Idea prioritization'. The templates are designed to help users generate and evaluate ideas effectively.

### 3 RESULT

#### 3.1 DATA MODEL

Object Name	Fields in the object	
Passport	Field label	Data type
	Passport	Text
	Contact number	Number
	Full Name	Text
	Passport Number	Text
Visa Slot	Visa slot	Master Detail Relationship
	Passport Number	Text
	Permanent Address	Text
Payment	Payment Mode	Master Detail Relationship
	Card Number	Location
	Transaction ID (Auto Number)	Number

## 3.2 ACTIVITY & SCREENSHOT

### MILESTONE – 2 : OBJECTS

#### ACTIVITY: 1 CREATION OF CUSTOM OBJECT: PASSPORT

The screenshot shows the Salesforce Object Manager interface for a custom object named 'passport'. The browser address bar indicates the URL: `dmgrgovernmentartsandscie4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w0000048WMO/Details/view`. The Salesforce navigation bar at the top includes the 'Setup' link and a search bar. The 'Object Manager' tab is selected, and the 'passport' object is highlighted in the left sidebar. The 'Details' section is active, showing various configuration options for the object. The 'Details' section includes a 'Description' field, 'API Name' (passport\_c), 'Custom' (checked), 'Singular Label' (passport), 'Plural Label' (passports), 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (checked), 'Deployment Status' (Deployed), and 'Help Settings' (Standard salesforce.com Help Window). The 'Edit' and 'Delete' buttons are visible in the top right corner of the details section.

**Details**

Field	Value
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

## ACTIVITY: 2 CREATION OF FIELDS ON CUSTOM OBJECT: PASSPORT

Appointment Topic Time Slot | S X +

drmrgovernmentartsandscie4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/AppointmentTopicTimeSlot/FieldsAndRelationships/view

Gmail YouTube Maps

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

### Appointment Topic Time Slot

Details

**Fields & Relationships**

7 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment Topic Time Slot Key	AppointmentTopicTimeSlotKey	Text(255) (Unique Case Insensitive)		✓
contact	contact_8489047907__c	Number(10, 0)		
Name	Name	Auto Number		✓
Operating Hours	OperatingHoursId	Lookup(Operating Hours)		
Time Slot	TimeSlotId	Lookup(Time Slot)		✓
Work Type	WorkTypeId	Lookup(Work Type)		
Work Type Group	WorkTypeGroupId	Lookup(Work Type Group)		

https://drmrgovernmentartsandscie4-dev-ed.develop.lightning.force.com/one.app#/setup/ObjectManager/AppointmentTopicTimeSlot/FieldsAndRelationships/view

Type here to search

ENG IN 11:11 PM 4/11/2023



# MILESTONE – 3: RELATIONSHIP BETWEEN OBJECTS

## ACTIVITY: CREATION OF RELATIONSHIP

The screenshot shows the Salesforce Setup interface for the 'visa slot' object. The left sidebar contains a navigation menu with the following items: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Fields & Relationships' and shows 5 items, sorted by Field Label. The table below lists the fields and their properties.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
passport number	passport_number10_c	Master-Detail(passport)		✓
Passport number	Passport_Number_c	Master-Detail(Payment)		✓
visa Name	Name	Text(80)		✓

The bottom of the screen shows the Windows taskbar with the search bar and several application icons. The system clock indicates the time is 11:14 PM on 4/11/2023.

# MILESTONE – 4 : APP

## ACTIVITY: CREATION OF APP

The screenshot shows the Salesforce Lightning Setup interface. The browser address bar displays the URL: `drmrgovernmentartsandscie4-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/AppointmentTopicTimeSlot/FieldsAndRelationships/page?add...`. The Salesforce navigation bar includes a search bar and navigation links for Setup, Home, and Object Manager. The main content area is titled "Appointment Topic Time Slot" and shows the "Fields & Relationships" section for the "contact" custom field. The field information table lists the following details:

Field Information	
Field Label	contact
Field Name	contact_8489047907
API Name	contact_8489047907__c
Description	
Help Text	
Data Owner	
Field Usage	
Data Sensitivity Level	
Compliance Categorization	
Created By	Senbagavalli S, 21/03/2023, 1:46 pm
Modified By	Senbagavalli S, 21/03/2023, 1:46 pm

The "General Options" section shows the "Required" checkbox is checked. The bottom of the screen shows the Windows taskbar with the search bar and various application icons.

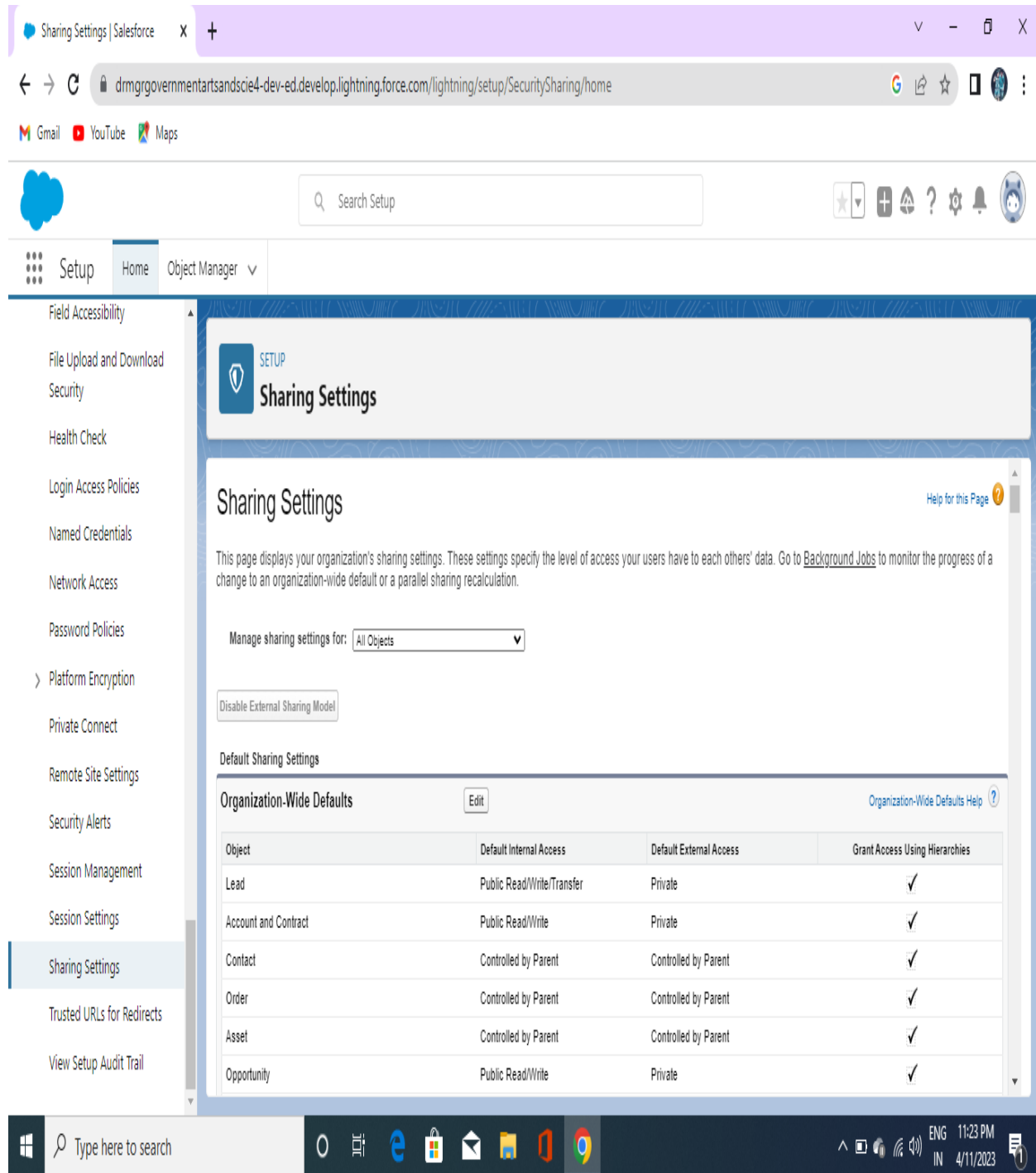
# MILESTONE - 5 : USER

## ACTIVITY: 1 CREATION OF USER

The screenshot displays the Salesforce Setup interface. The browser address bar shows the URL: `dmgrgovernmentartsandscie4-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F0052w00000Fy4WjAAJ%3Fnoredirect%3D1...`. The Salesforce Setup navigation bar includes a search bar and tabs for Setup, Home, and Object Manager. The left sidebar contains a 'Quick Find' search bar and a list of setup categories: Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, and Users. The 'Users' category is selected, showing a list of user-related options: Permission Set Groups, Permission Sets, Profiles, and Public Groups. The main content area displays the 'User Detail' page for 'Senbagavalli S'. The page includes a 'User Profile' link and a 'User Detail' section with a table of user information. The table has columns for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Role, User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User. The user details are as follows:

Name	Role
Senbagavalli S	Salesforce
Alias	SS
Email	sssenbagavalli842003@gmail.com
Username	senba@mgrcollege.com
Nickname	User16793791262831318257
Title	
Company	Dr.M.G.R. Government Arts and Science College for Women, Villupuram
Department	
Division	
Address	IN
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Locale	English (India)
Active	<input checked="" type="checkbox"/>
Marketing User	<input checked="" type="checkbox"/>
Offline User	<input checked="" type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input checked="" type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>

## ACTIVITY – 2: OWD – ORGANIZATION WIDE DEFAULT SETTINGS



The screenshot shows the Salesforce Sharing Settings page in a web browser. The browser's address bar displays the URL: `drmrgovernmentartsandscie4-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/home`. The Salesforce interface includes a top navigation bar with a search box and a left sidebar menu. The sidebar menu lists various setup categories, with 'Sharing Settings' highlighted. The main content area is titled 'Sharing Settings' and contains a description of the page's purpose. Below the description, there is a dropdown menu for 'Manage sharing settings for' set to 'All Objects'. A button labeled 'Disable External Sharing Model' is also visible. The 'Default Sharing Settings' section features a table of 'Organization-Wide Defaults'.

**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	✓

## MILESTONE - 6 : REPORTS

### ACTIVITY: 1 CREATION OF REPORT

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

**REPORT ▾**

Passport with visa locations / **Passports with Visa Slots with Payments** [Got Feedback?](#) [Add Chart](#) [Save & Run](#) [Save ▾](#) [Close](#) [Run](#)

**Outline** ▾ **Filters** ▾

**Groups** [Add group...](#) [Location](#)

**GROUP ROWS**

**GROUP COLUMNS** [Add group...](#) [Passport ID](#)

**Columns** ▾ [Add column...](#) [Passport Number](#) [Visa Slot Number](#)

**Previewing a limited number of records. Run the report to see everything.** [Update Preview Automatically](#)

Location	Passport ID	a042x00000MTBq	a042x00000NRg3	Total
New Delhi	Record Count	1	0	1
Mumbai	Record Count	1	0	1
Chennai	Record Count	0	1	1
Hyderabad	Record Count	1	1	2
<b>Total</b>	Record Count	3	2	5

**Details (5 Rows)** [Click an intersection in the table above to filter details.](#)

	Passport Number	Visa Slot Number
1	09x243	V-00002
2	09x243	V-00003
3	3536we	V-00004
4	09x243	V-00001

**Row Counts** ☒ **Detail Rows** ☒ **Grand Total** ☒ **Stacked Summaries** ☒ [Conditional Formatting](#)

## MILESTONE - 7: DASHBOARDS

### ACTIVITY: CREATION OF DASHBOARDS

### Edit Component

Value

Record Count

Sliced By

Location

Display Units

Shortened Number

☒ Show Values

☐ Show Percentages

☒ Combine Small Groups into "Others"


☒ Show Total

Preview

#### Passport with visa locations

Record Count

Hyderabad ●



2

2

[View Report \(Passport with visa locations\)](#)

Cancel

Update

## 4 TRAILHEAD PROFILE PUBLIC URL

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

Team Member 1 - <https://trailblazer.me/id/gsaranya6>

Team Member 2 - <https://trailblazer.me/id/sarim30>

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

## 5 ADVANTAGES AND DISADVANTAGES

### ADVANTAGES:

**a) Optimize your time:** The correct use of a cloud based CRM software ensures proper utilization of time. The Travel agency CRM software provides amazing features for your reps which helps the reps to optimize their time according to the assigned work. Some features which helps you to optimize your time and work with productivity are

- To-do list
- Automated Reports
- Mobile CRM

**b) Overall database:** The Travel CRM software helps you to manage the overall customer data and information in a single platform. It allows to track information regarding-

- Customer information
- Travel itinerary
- Pre-sales and post-sales interaction
- Customer experience etc

**c) Right management of Leads:** The travel agency CRM software not only helps to track inquiries but it also lets you to capture details like lead source, data, industry, competitors, websites multiple contacts and hosts of other fields. The overall information of your customers in just a click away from you. Once you enter the inquiry details in the software it lets you to create activities like emails, follow-ups, appointment, payments etc based on the lead. Thus, you can also store this information for future reference.

**d) Marketing campaigns:** If you are a travel agency who wants to provide the best travel experience by your service but you are struggling to understand the best marketing strategy to attract your customers. The marketing campaigns provides emails and SMS campaigns through which you can reach a larger group of targeted customers.

**e) Follow-up management:** Follow ups in sales funnel helps you convert your leads into sales and makes money in your business. The travel agency CRM lets you to manage a record of complete communication chain between the organization and customers. You can send predefined email templates like welcome and thank you mails to your leads. You can also set automated reminders



and alerts for the actions need to be taken by the agents. Thus, the travel CRM ensures continuous communication which results in efficient closing of sales.

- f) Customer satisfaction:** Customer satisfaction is one such aspect that is linked with several other benefits like – enhances brand image, retains existing customers, promotes customer loyalty, helps to acquire new customers and in turn increases profit and revenue of the company. Thus, to achieve Customer satisfaction amongst your customer you need a bridge of communication. And that bridge is the travel agency CRM software. It helps you to understand your customer's expectation, needs and wants. It also ensures the right form of response from your side to the customers.
- g) Manage daily offers, deals and packages:** The CRM for travel industry helps you to have a complete information of the offers, deals and packages and retrieve it with just a click. It also helps you to manage complex booking process and also ensures the visibility of payments, bookings, and service history etc.
- h) Multi branch access:** The travel CRM is based on Multiple User based model & moreover it is online, it can be logged in by many different users at anytime and from anywhere. If in case any travel set up has multiple branches, then it becomes very fruitful for them to manage the internal coordination.

## DISADVANTAGES

Implementing a customer relationship management (CRM) solution is a great way of making the most of your business assets. However, problems in implementing a CRM can cause major difficulties for your business.

**a) CRM costs:** One of the greatest challenges to CRM implementation is cost. There are dozens of software options available and many pricing plans that go with them. To work out the actual costs of CRM software, make sure that you consider the total cost of ownership including:

- Software subscription or purchase fees
- Premium upgrades, eg add-on marketing or reporting features
- Customization
- IT resources needed
- Hardware or software requirements
- Staff training and upskilling

Other factors such as data migration and quality and converting business operations may also affect the total costs of CRM implementation. Proper planning and careful assessment of any potentially hidden costs should help you set a realistic budget for your CRM project.

**b) Business culture:** 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 is loss of revenue, unless everyone in the business is committed to viewing their operations from the customer's perspective.

- c) **Poor communication:** To secure buy-in and make CRM work, all the relevant people in your business must know what information you need and how to use it. Make sure to communicate integration needs in advance if other teams need to cooperate on the implementation, eg payroll staff.
- d) **Lack of leadership:** Weak leadership could cause problems for any CRM implementation plan. Management should lead by example and push for customer focus on every project. If a proposed plan isn't right for your customers, don't do it. Task your team to come up with a better alternative.

## 6 APPLICATIONS

- a) **Tracking customers:** A good CRM helps you understand your market and the needs of your customers. As you attract more customers, a CRM makes two things clear: who is interested in what you have to offer and what is most important to them. When it comes to winning more customers, a CRM helps you make smarter decisions than your competition and offer people what they truly want. And if customers leave or your sales stagnate, you can see common threads and change the process accordingly, to better meet their needs and retain them.

- b) Collecting Data for Marketing:** When you're working in spreadsheets and scrolling through email chains, it's hard to get a big picture of all the important data about current and future customers. A CRM saves important data in extensive customer and contact lists.
- c) Improving interactions and communications:** When your list of customers is short, it's easy to keep up with everyone. However, as your business grows and that list becomes longer, it's more likely that sales opportunities and current customers may all through the cracks. A good CRM helps you maintain great customer relationships with all your clients and let them know what your products and services can do for them.
- d) Streamlining Internal Sales Processes:** Because every salesperson operates differently, things can get inefficient quickly. A good CRM helps you streamline your internal sales processes so that there is consistency and quality across your sales team. This is the secret to how companies can promise and consistently deliver, great customer service – having one place where all the customer information lives and the processes to back it up.
- e) Planning your Operations:** A good customer relationship management tool will help you understand your current capacity and the demand customers are likely to have for your products and services. This means you will see trends and be informed faster as things grow and change. By accessing valuable insights that help you make better decisions, using customer insights to gain an

upper hand on your competition, and developing processes that allow you to provide the same high quality of service. Implementing an operational CRM platform means choosing to break through the ceiling of your sales potential.

## **7 CONCLUSION**

The purpose of this study has been to investigate and propose a CRM system to fit the organization Release. The proposal is based on a study of the market, a literature review and research at Release using qualitative interviews and a questionnaire. The analysis shows that the Salesforce.com solution should be chosen with 86.42% in total score.

The CRM community and other firms in the industry seeking for a CRM solution might regard this study as case – specific. However, future studies can use the approach used in this paper to abstract and refine a model choosing a CRM system. The result and the proposed CRM systems should serve as a suggestion to Release. Release should perform a final analysis to determine the CRM system with the results as basis.

Organizations are always striving to find the perfect fit between their organization and their IT systems. However, that is not the only factor that should be considered. The success of an IT system is often reflected by its adaption and use in the organization itself. With that said, it is clear that the organization has to take responsibility if they want their IT initiatives to receive maximum benefits.

## **8 FUTURE SCOPE**

The primary goal of the study is to provide a recommendation to Release to assist in their choice of a CRM system. The recommendation should be based on research and investigation with academic level to give the necessary reliability. The scope can be separated into three different parts:

- Research
- Evaluation
- Documentation