

Project Report Template

1. INTRODUCTION

1.1 Overview:

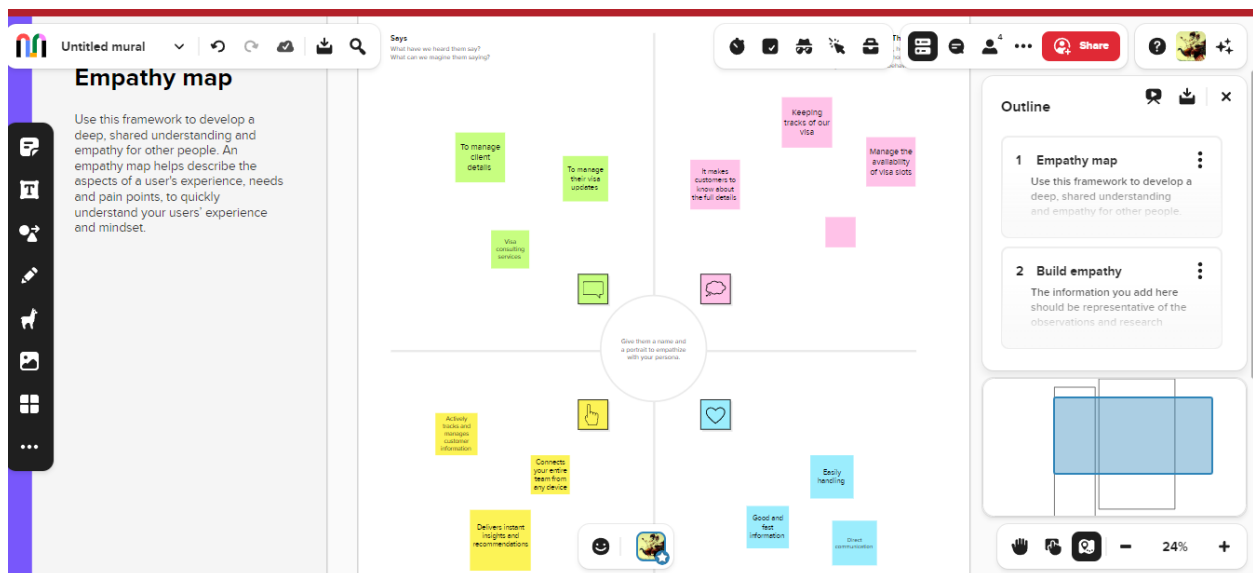
A visa slot management project is a system that used to track and manage the availability of visa slot, which are appoints that are required for certain visa applications. It might be used by a government agency or a visa processing centre to schedule and manage appointment with applicants.

1.2 Purpose:

Saving the time of the customer who wants 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.

2. PROBLEM DEFINITION & DESIGN THINKING

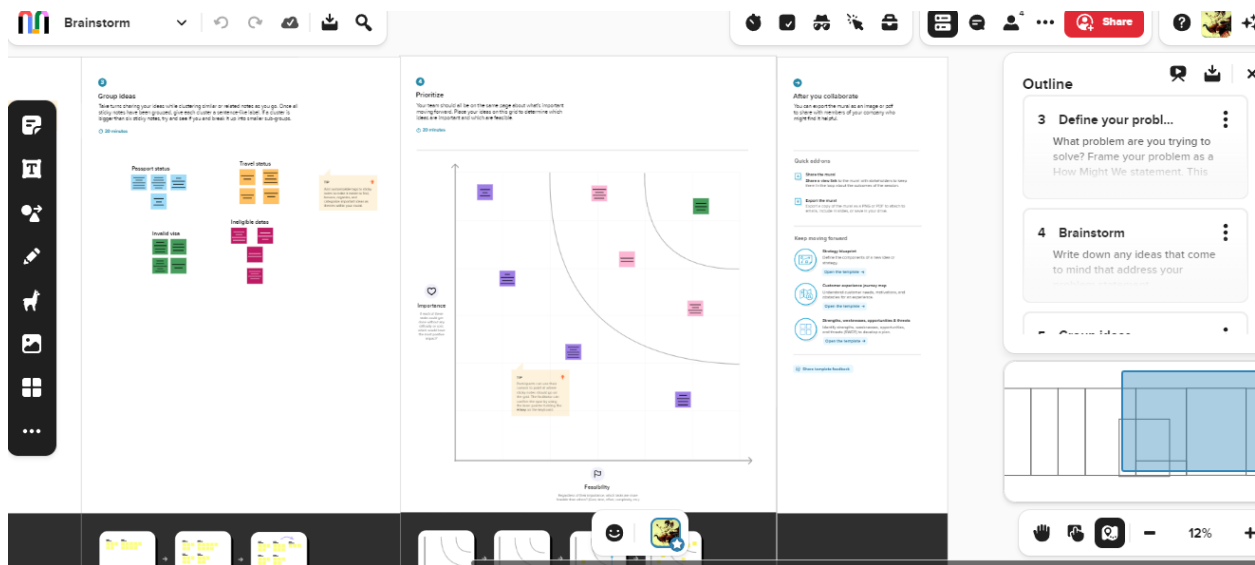
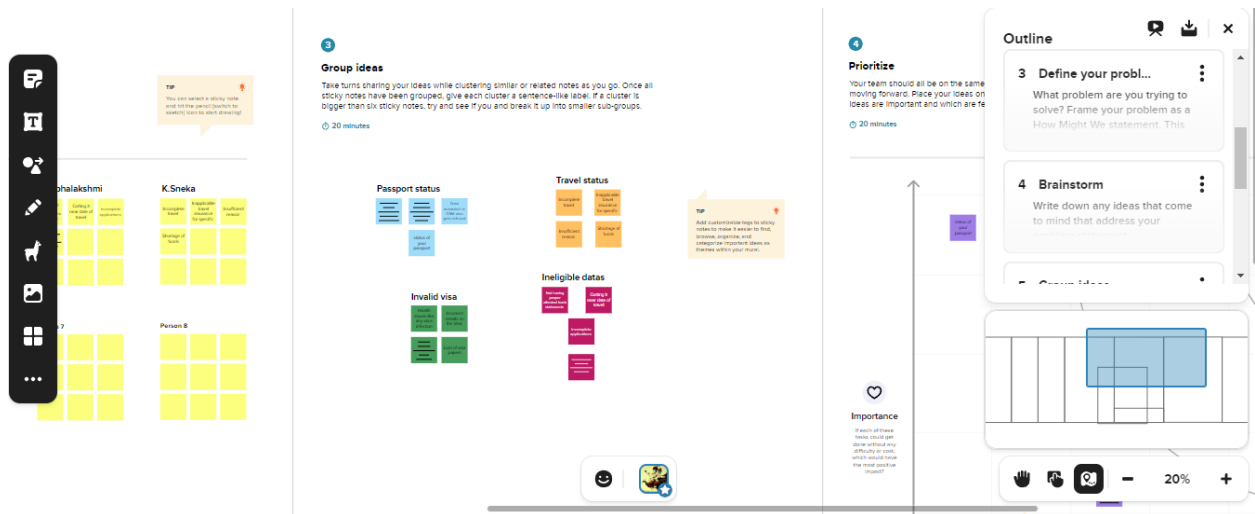
2.1 Empathy Map:



2.2 Ideation and Brainstorming map:

The screenshot displays the Brainstorm app interface during a session. At the top, a red banner indicates: "You've reached the maximum number of murals. Upgrade your free plan for unlimited murals." with an "Upgrade" button. The interface is divided into three main panels. The left panel, titled "Define your problem statement", contains a "Problem" box with the text "How might the problem facing in CRM you solve?" and a "Key rules of brainstorming" section. The middle panel, titled "Brainstorm", shows a grid of sticky notes for four participants: S.Sujitha, S.Swathi, K.Subhalakshmi, and K.Sneha. Each participant has a 3x3 grid of yellow sticky notes. The right panel, titled "Group ideas", shows an "Outline" section with steps 3 and 4. A "Share" button is visible in the top right corner. The bottom of the interface features a toolbar with various icons for editing and a zoom level of 20%.

The screenshot displays the Brainstorm app interface showing a template for brainstorming and idea prioritization. At the top, a red banner indicates: "You've reached the maximum number of murals. Upgrade your free plan for unlimited murals." with an "Upgrade" button. The interface is divided into three main panels. The left panel, titled "Brainstorm & idea prioritization", contains a "Template" section with a lightbulb icon and text: "Use this template in your own brainstorming sessions so your team can unleash their imagination and start shaping concepts even if you're not sitting in the same room." The middle panel, titled "Before you collaborate", contains a "Define your problem statement" section. The right panel, titled "Group ideas", shows an "Outline" section with steps 3 and 4. A "Share" button is visible in the top right corner. The bottom of the interface features a toolbar with various icons for editing and a zoom level of 17%.



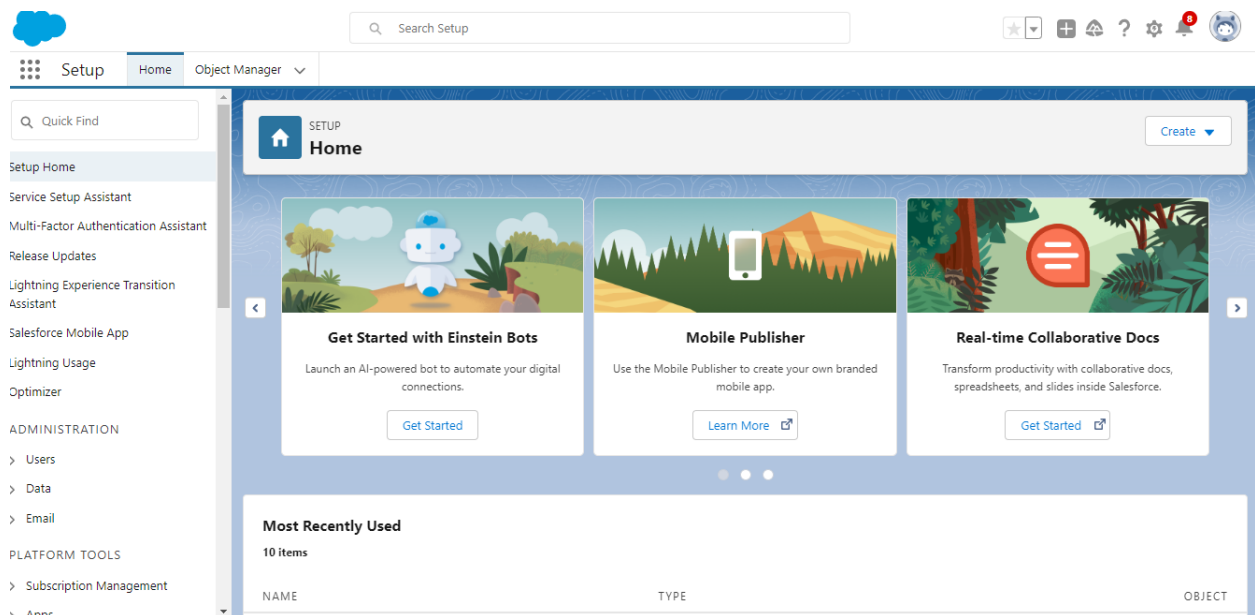
3. RESULT:

3.1 Data Model:

Object Name	Fields in the Object
Object-1	Field label: Passport Number Data Type: Text
Object-2	Field label: Visa Slot Data Type: Text
Object-3	Field label: Visa slot Number Data Type: Master Detail Relationship
Object-4	Field label: Location Data Type: Geolocation

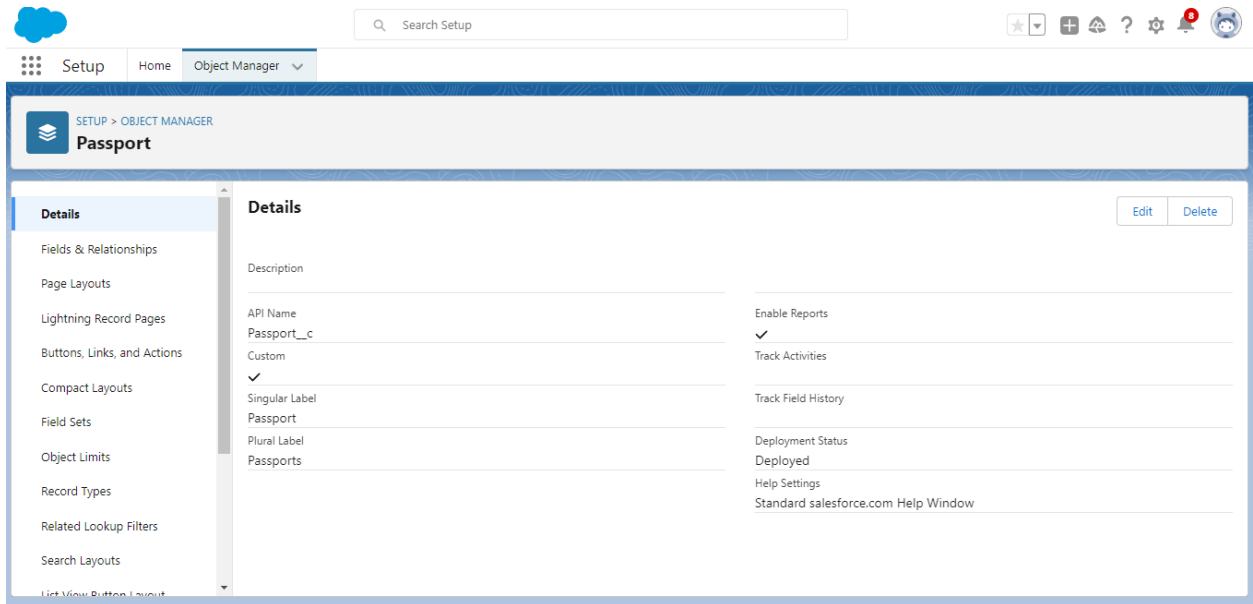
3.2 Activity and Screenshot:

Create Salesforce Org-Creating Developer Account



Creation of Custom Object:

Creation of Passport



The screenshot shows the Salesforce Setup interface for a custom object named "Passport". The left sidebar contains a navigation menu with options: 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, and List View Button Layout. The main content area is titled "Details" and includes a description field, API Name (Passport__c), Custom checkbox (checked), Singular Label (Passport), Plural Label (Passports), Enable Reports checkbox (checked), Track Activities checkbox, Track Field History checkbox, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). Edit and Delete buttons are located in the top right corner.

Setup > OBJECT MANAGER

Passport

Details [Edit](#) [Delete](#)

Description

API Name
Passport__c

Custom
✓

Singular Label
Passport

Plural Label
Passports

Enable Reports
✓

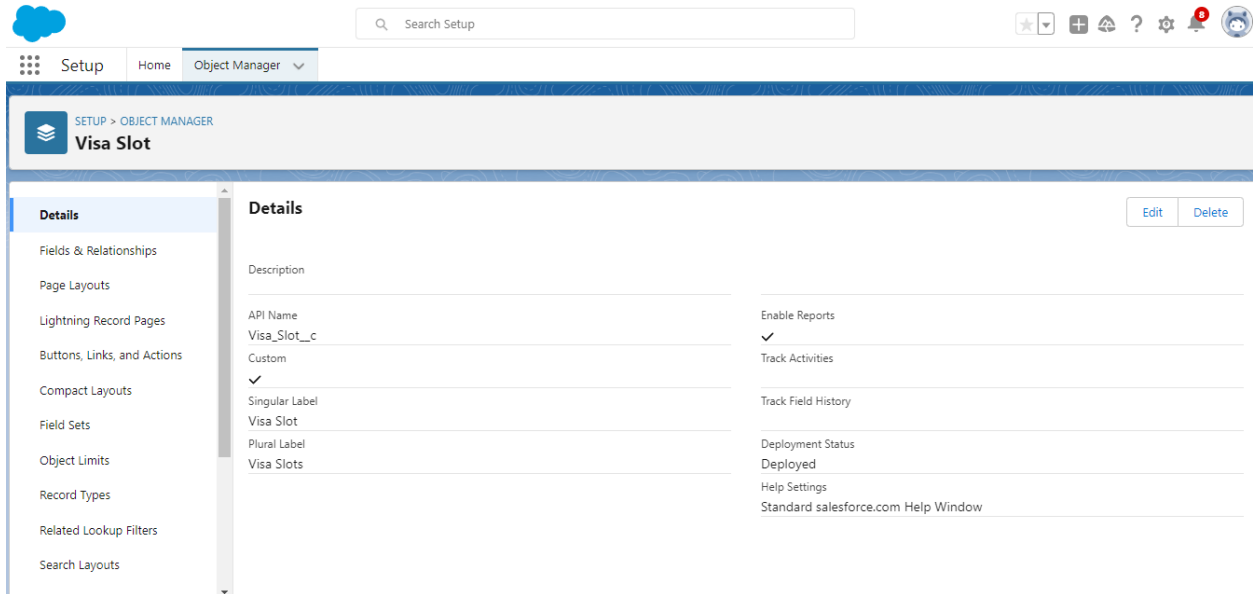
Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Creation of Visa Slot



The screenshot shows the Salesforce Setup interface for a custom object named "Visa Slot". The left sidebar contains a navigation menu with options: 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, and List View Button Layout. The main content area is titled "Details" and includes a description field, API Name (Visa_Slot__c), Custom checkbox (checked), Singular Label (Visa Slot), Plural Label (Visa Slots), Enable Reports checkbox (checked), Track Activities checkbox, Track Field History checkbox, Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). Edit and Delete buttons are located in the top right corner.

Setup > OBJECT MANAGER

Visa Slot

Details [Edit](#) [Delete](#)

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

Creation of Payments



Search Setup



SetupHomeObject 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

EditDelete

Creation of Reschedule/Cancel



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Reschedule/Cancel

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_Cancel__c

Custom

✓

Singular Label

Reschedule/Cancel

Plural Label

Reschedules/Cancels

Enable Reports

✓

Track Activities

Track Field History

Deployment Status

Deployed

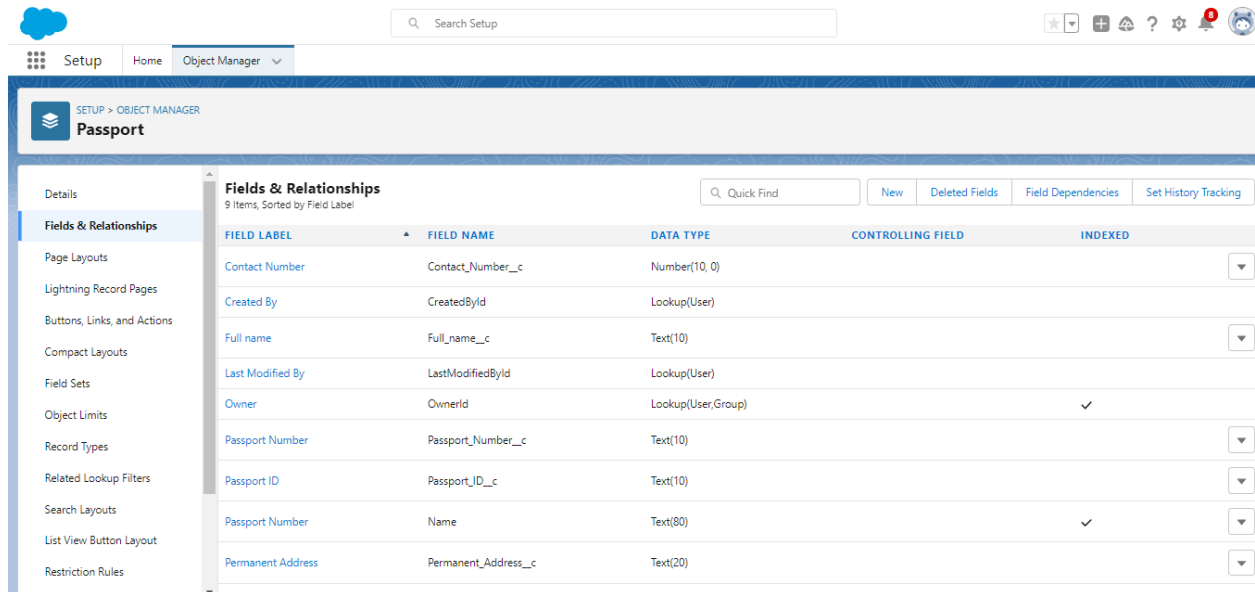
Help Settings

Standard salesforce.com Help Window

EditDelete

Create of field on Custom Object

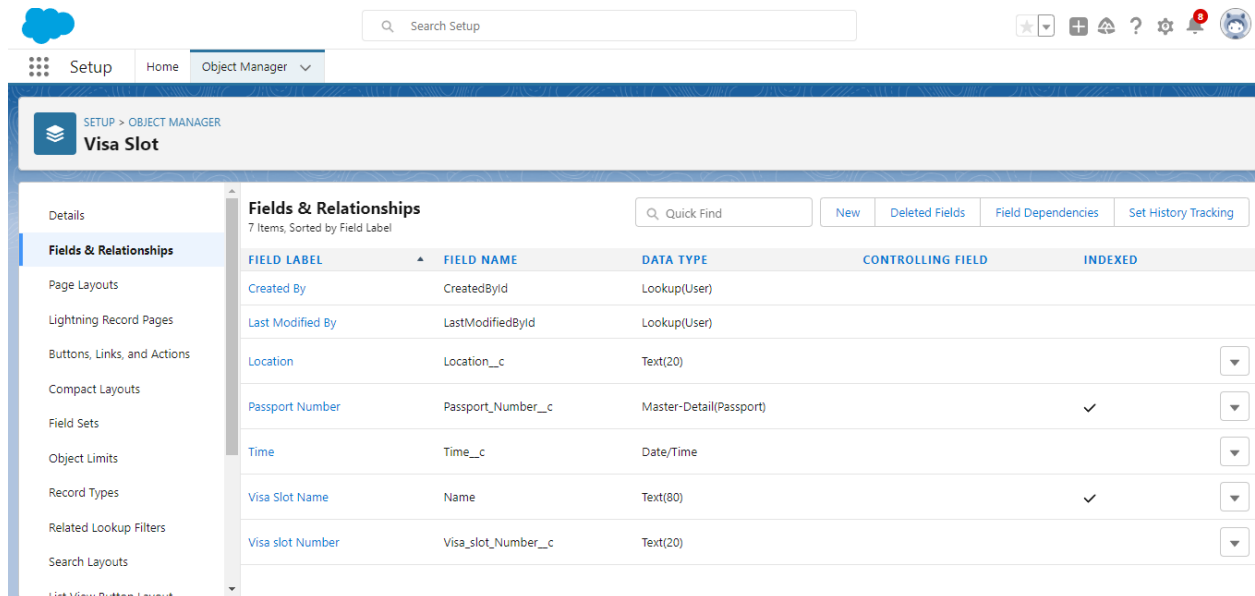
Fields and Relationship of Passport



The screenshot shows the Salesforce Setup interface for the 'Passport' custom object. The 'Fields & Relationships' section is active, displaying a list of 9 fields. The left sidebar contains navigation links for various object settings. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The search bar at the top right contains 'Search Setup'. The 'Fields & Relationships' section has a 'Quick Find' search bar and buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Contact Number	Contact_Number__c	Number(10, 0)		
Created By	CreatedById	Lookup(User)		
Full name	Full_name__c	Text(10)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Passport Number	Passport_Number__c	Text(10)		
Passport ID	Passport_ID__c	Text(10)		
Passport Number	Name	Text(80)		✓
Permanent Address	Permanent_Address__c	Text(20)		

Fields and Relationship of Visa Slot



The screenshot shows the Salesforce Setup interface for the 'Visa Slot' custom object. The 'Fields & Relationships' section is active, displaying a list of 7 fields. The left sidebar contains navigation links for various object settings. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The search bar at the top right contains 'Search Setup'. The 'Fields & Relationships' section has a 'Quick Find' search bar and buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Location	Location__c	Text(20)		
Passport Number	Passport_Number__c	Master-Detail(Passport)		✓
Time	Time__c	Date/Time		
Visa Slot Name	Name	Text(80)		✓
Visa slot Number	Visa_slot_Number__c	Text(20)		

Lightning App

The screenshot shows the Salesforce Lightning Experience App Manager. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar is present. The left sidebar shows a navigation menu with 'Salesforce Mobile App', 'Data', 'Apps', 'App Manager', 'AppExchange Marketplace', 'Connected Apps', 'Lightning Bolt', 'Flow Category', 'Lightning Bolt Solutions', 'Mobile Apps', and 'Salesforce'. The main content area is titled 'Lightning Experience App Manager' and features a 'Clone Apps(Beta)' section with a toggle for 'Enable App Cloning'. Below this is a table listing 22 items, sorted by App Name, filtered by All appmenu/items - TabSet Type. The table has columns for App Name, Developer, Description, Last Modified, App Type, and Visibility.

	App N...	Devel...	Description	Last Mo...	Ap...	Vi...
1	All Tabs	AllTabSet		22/03/2023,...	Classic	
2	Analytics Stu...	Insights	Build CRM An...	22/03/2023,...	Classic	✓
3	App Launcher	AppLaunc...	App Launcher ...	22/03/2023,...	Classic	✓
4	Bolt Solutions	Lightning...	Discover and ...	22/03/2023,...	Lightning	✓
5	Book my Visa	Book_my_...		25/03/2023,...	Lightning	✓
6	Community	Community	Salesforce CR...	22/03/2023,...	Classic	✓
7	Content	Content	Salesforce CR...	22/03/2023,...	Classic	✓
8	Data Manager	DataMan...	Ultra Data Man	22/03/2023,...	Lightning	✓

Create of Book my Visa

The screenshot shows the Salesforce Lightning App Builder interface for the 'Book my Visa' app. The top navigation bar includes 'Lightning App Builder', 'App Settings', 'Pages', and 'Book my Visa'. The left sidebar shows a navigation menu with 'App Settings', 'App Details & Branding', 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main content area is titled 'App Details & Branding' and contains two sections: 'App Details' and 'App Branding'. The 'App Details' section includes fields for 'App Name' (Book my Visa), 'Developer Name' (Book_my_Visa), and 'Description' (Enter a description...). The 'App Branding' section includes an 'Image' upload field, a 'Primary Color Hex Value' field (#0070D2), and an 'Org Theme Options' checkbox. Below these sections is an 'App Launcher Preview' showing the app icon and name.

App Details

* App Name: Book my Visa

* Developer Name: Book_my_Visa

Description: Enter a description...

App Branding

Image: [Upload]

Primary Color Hex Value: #0070D2

Org Theme Options: ☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

Bm Book my Visa

Create a User

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.

Search Setup

Star

Share

Help

Settings

Notifications

Profile

SETUP

Users

All Users

Help for this Page

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	chatty00s2w00000rpoiwear.vhep8eindkvu@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	S. Swathi	SS	swathi@QT.com		✓	System Administrator
<input type="checkbox"/> Edit	S. Swathi	SA	swathistudy2020@gmail.com		✓	Standard User
<input type="checkbox"/> Edit	User Integration	inteo	integration@00s2w00000rpoiwear.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sac	in9phtisecurity@00s2w00000rpoiwear.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

All

Create a Report

Sales

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Chatter

Groups

Calendar

More

Search...

Star

Share

Help

Settings

Notifications

Profile

Reports

Recent

2 Items

Search recent reports...

New Report

New Folder

Star

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Passport with Visa locations		Private Reports	Swathi S	26/3/2023, 10:17 am	<input type="checkbox"/>
Created by Me	Passport with Visa location		Private Reports	Swathi S	26/3/2023, 10:13 am	<input type="checkbox"/>
Private Reports						
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

Dashboard

This screenshot shows the 'Recent' view of the Salesforce Dashboards page. The top navigation bar includes 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Dashboards', 'Reports', 'Chatter', 'Groups', 'Calendar', and 'More'. The 'Dashboards' tab is selected. Below the navigation bar, there is a search bar and buttons for 'New Dashboard' and 'New Folder'. The main content area displays a table of recent dashboards. The table has columns for 'Dashboard Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. The first row shows a dashboard named 'Passport with Visa locations' in the 'Private Dashboards' folder, created by 'Swathi S' on '26/3/2023, 10:14 am'. On the left side, there is a sidebar with filters for 'DASHBOARDS' (Recent, Created by Me, Private Dashboards, All Dashboards), 'FOLDERS' (All Folders, Created by Me, Shared with Me), and 'FAVORITES' (All Favorites).

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Passport with Visa locations		Private Dashboards	Swathi S	26/3/2023, 10:14 am	

This screenshot shows the 'Passport with Visa locations' dashboard. The top navigation bar is the same as the previous screenshot. The dashboard title is 'Passport with Visa locations' with a warning icon indicating it was last refreshed 18 days ago. Below the title, there is a donut chart titled 'Passport with Visa location' showing the 'Record Count' by 'Location'. The chart has four segments, each representing a location with a count of 1. The locations are Chennai (blue), Hyderabad (light blue), Mumbai (purple), and New Delhi (dark purple). The total record count is 4. Below the chart, there is a link to 'View Report (Passport with Visa location)'. On the right side of the dashboard, there are buttons for 'Refresh', 'Edit', and 'Subscribe'.

Record Count

Location	Record Count
Chennai	1
Hyderabad	1
Mumbai	1
New Delhi	1

4. TRAILHEAD PROFILE PUBLIC URL:

Team Lead – <https://trailblazer.me/id/suji18>

Team member 1- <https://trailblazer.me/id/swats186>

Team member 2- <https://trailblazer.me/id/skanagasabai>

Team member 3- <https://trailblazer.me/id/snekk35>

5. ADVANTAGES AND DISADVANTAGES:

Advantages:

1. New Inquiry Management Software:

Present the new inquiries generated through direct sales.

Helps to add information of the clients which include Personal Details, Education & Experience Description, Country selection.

2. Customer Relationship Management Software:

Provide in-depth details of customers that includes Meetings, Proposals, Historical Communication notes and sales to invoice information on a single platform.

3. Maintain Communication notes & logs for particular Customer:

Allow Users (Consultant, Counsellor) to record a note for the individual customer.

Set up a reminder for each customer for the next level meeting.

Can be added multiple University Applications for student visa.

4. Marketing:

Email and Message marketing which helps you to update your customers with new rules and regulation of immigration. Moreover, you can offer promotion deals/coupons to customers.

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

Promotion Emails and Message helps you to generate more leads and business.

5. Invoicing:

Allow counsellors to generate invoice and receipt for customers online and secure payments.

Accounting Management enables you to find the invoice with the status of payment (Paid or Unpaid).

Advantages in points:

- 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.

6. APPLICATION:

Visa Consultants CRM Software is a type of management tool to manage client details and their visa updates. The tool is based primarily on cloud technologies intended to serve immigration and visa consulting services.

7. CONCLUSION:

CRM Application that helps to books a visa slot enables to align its strategy with the needs of the customer and ensure long term customer loyalty. 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.

8. FUTURE SCOPE:

Customer relationship management is the best means to reach your customers and serve them in the best way. It automates all those tasks which enterprises used to perform manually. Every organization is set up with some frustrated ambitions and targets. The better the performance of your business, the better the relationship with your customers will be. CRM software Development can turn your business into a powerhouse of sales. Thus, CRM software is no longer essential, in fact mandatory for small and medium businesses. Now, you can easily access the CRM software virtually from anywhere and anytime. All you need an internet connection to further the scope of doing your business. So, don't be late and perform the necessities for implementing the CRM software in your business.