

Project Report Template

INTRODUCTION

1.1 Overview:

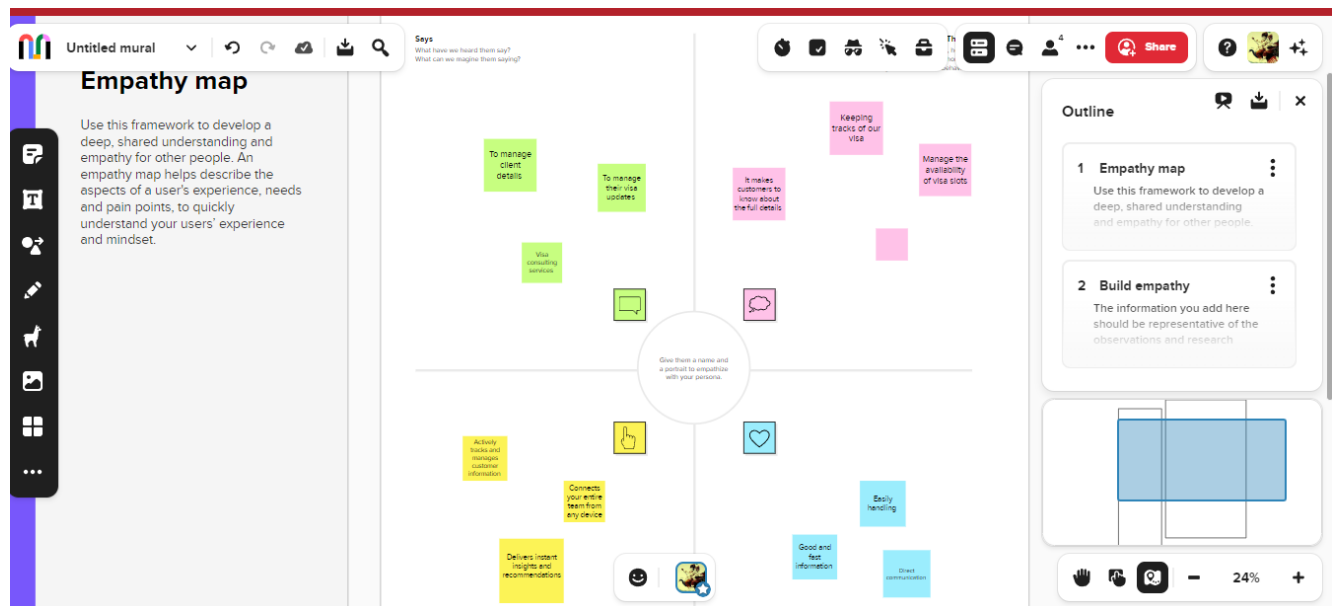
A visa slot management project is a system that is used to track and manage the availability of visa slots ,which are appointments that are required for certain visa applications. It might be used by a government agency or a visa processing center to schedule and manage appointments with applicants.

1.1 Purpose:

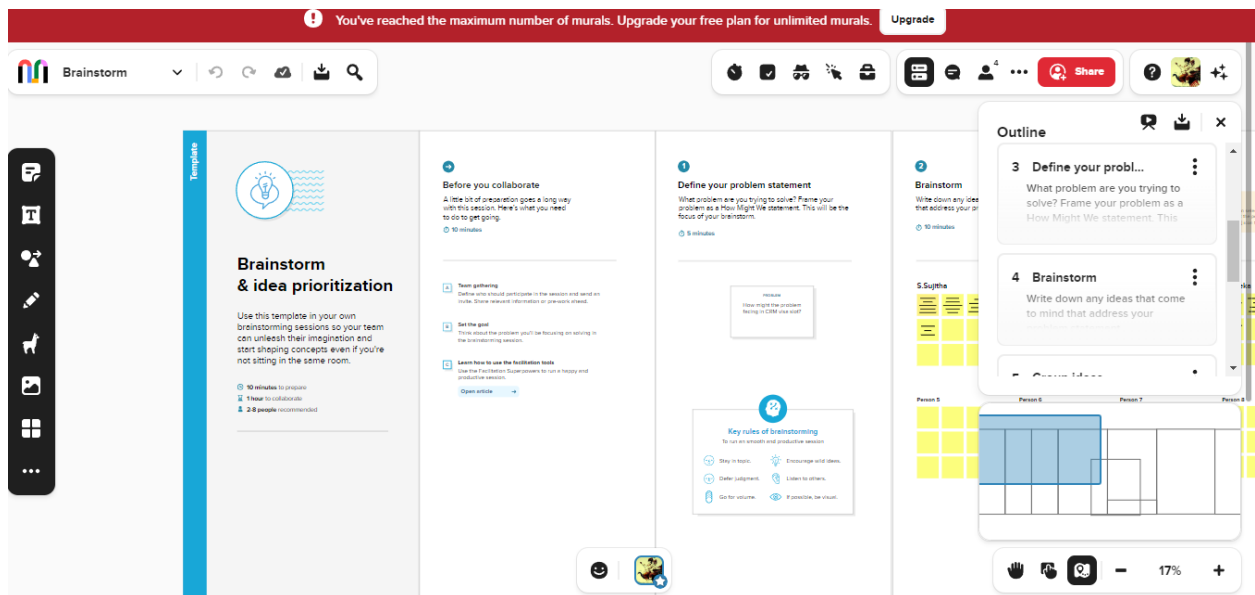
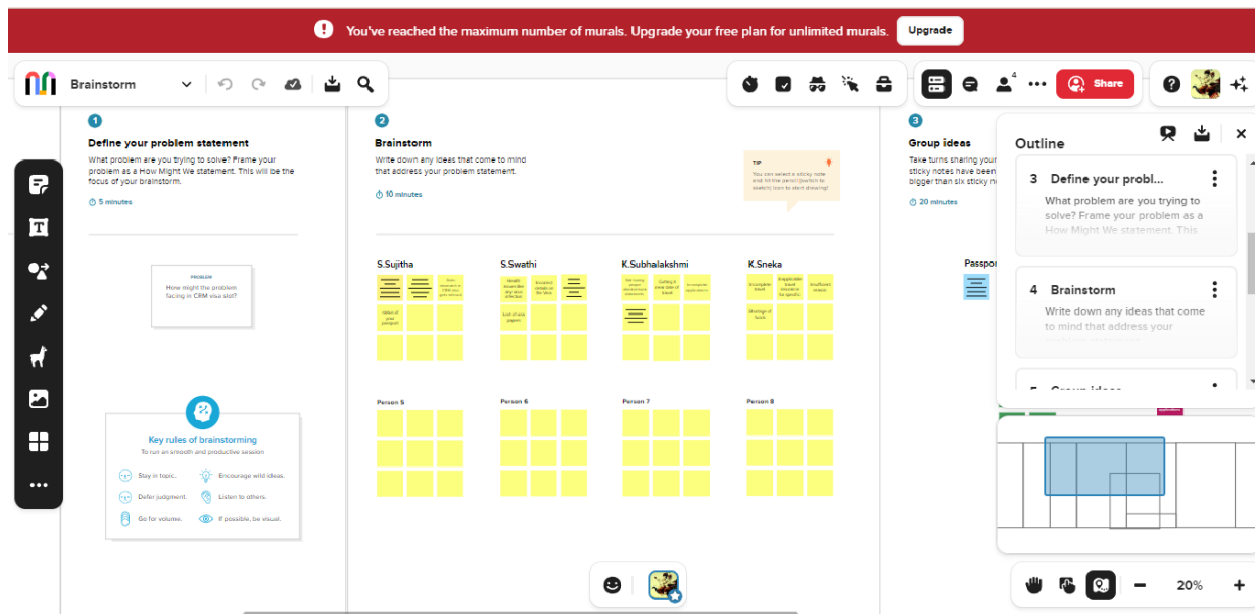
Saving the time of the customers who want to book it by using CRM application of booking a visa slot. Wandering for booking the visa slot and tracking can be reduce here. Reduce the paper filling as much the customer expecting. Ensuring the safety of the customers and panic of many verifications.

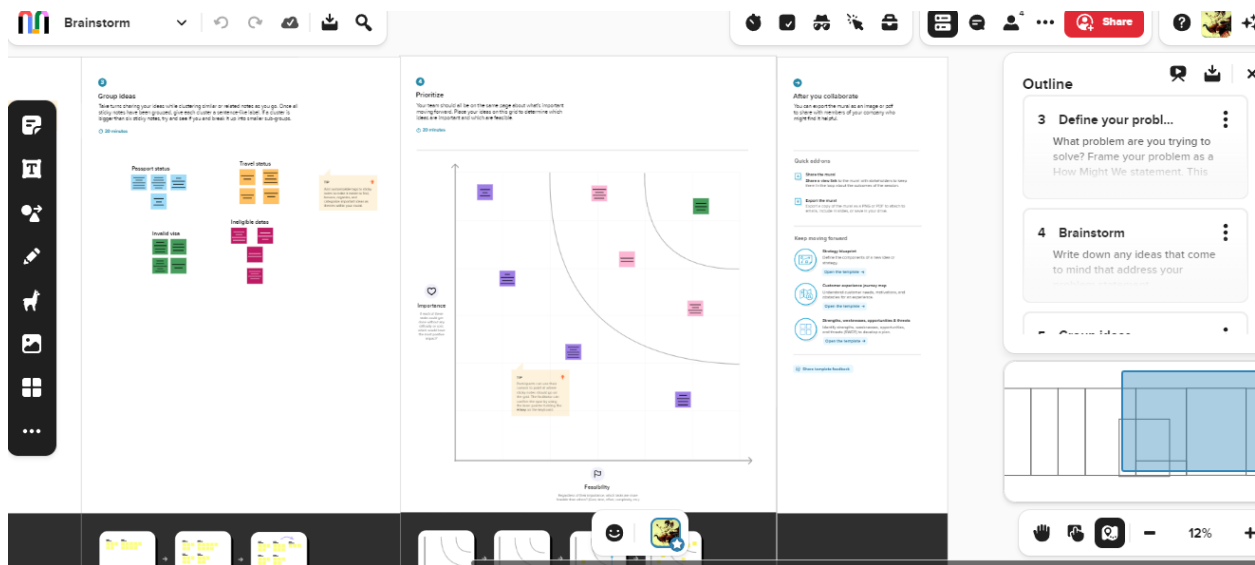
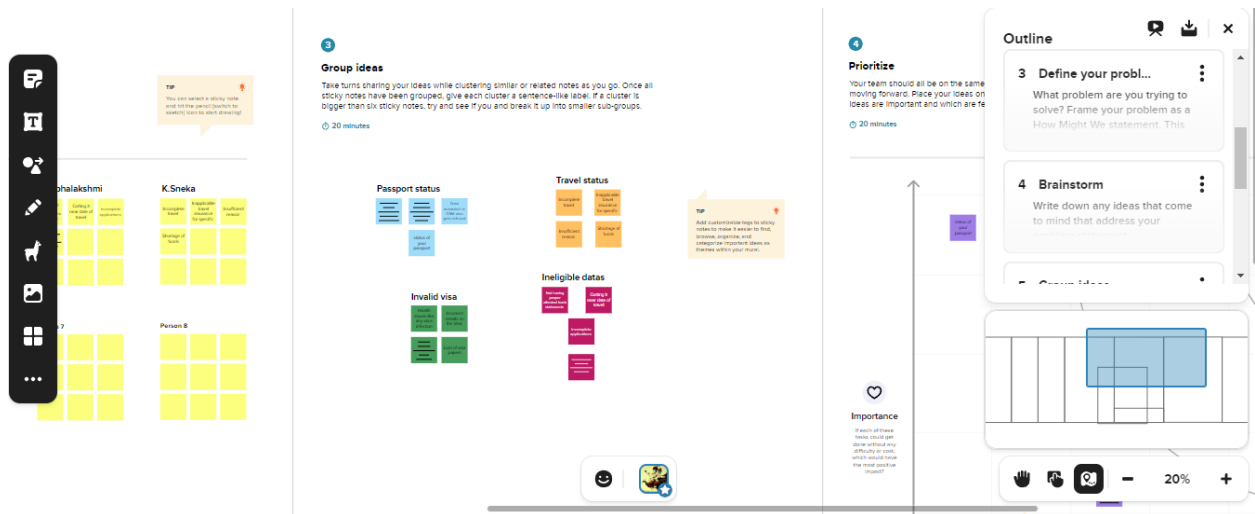
2. Problem Definition & Design Thinking:

2.1 Empathy Map:



2.2 Ideation and Brainstorming map Screenshot:





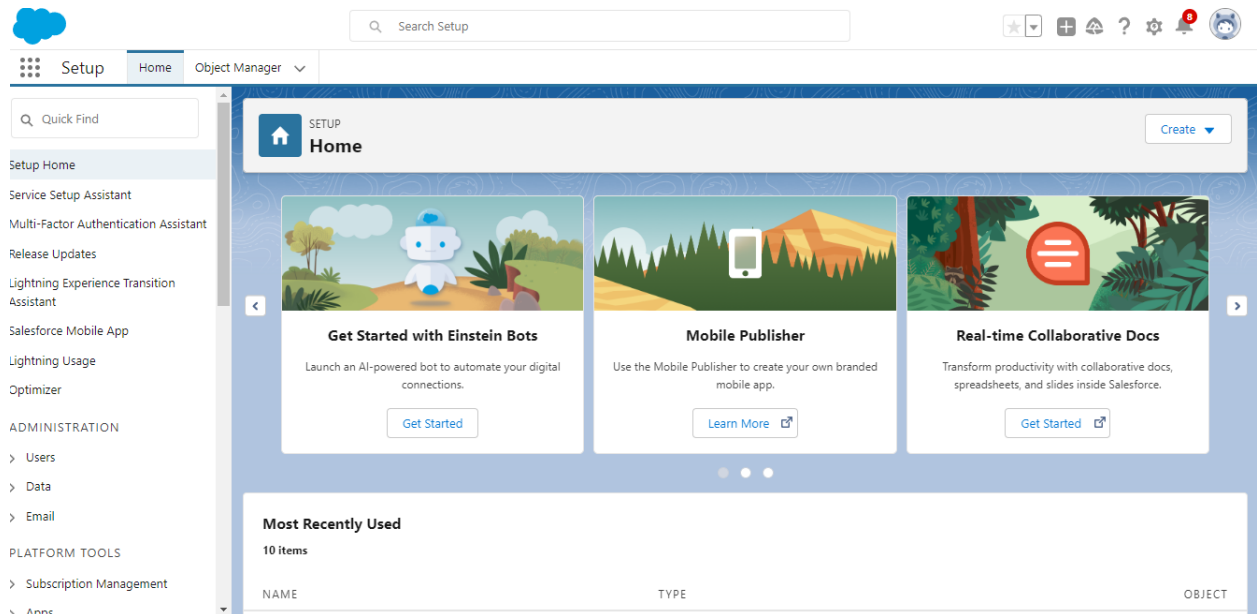
3. RESULT:

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



Object:

Creation of Passport

The screenshot shows the Salesforce Setup interface for the 'Passport' object. 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, and Search Layouts. The main content area is titled 'Details' and includes a description field and a table of configuration options. The 'API Name' is 'Passport__c' and the 'Singular Label' is 'Passport'. The 'Enable Reports' checkbox is checked. The 'Deployment Status' is 'Deployed'.


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

Creation of Visa Slot








The screenshot shows the Salesforce Setup interface for the 'Visa Slot' object. 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, and Search Layouts. The main content area is titled 'Details' and includes a description field and a table of configuration options. The 'API Name' is 'Visa_Slot__c' and the 'Singular Label' is 'Visa Slot'. The 'Enable Reports' checkbox is checked. The 'Deployment Status' is 'Deployed'.

Field	Value
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

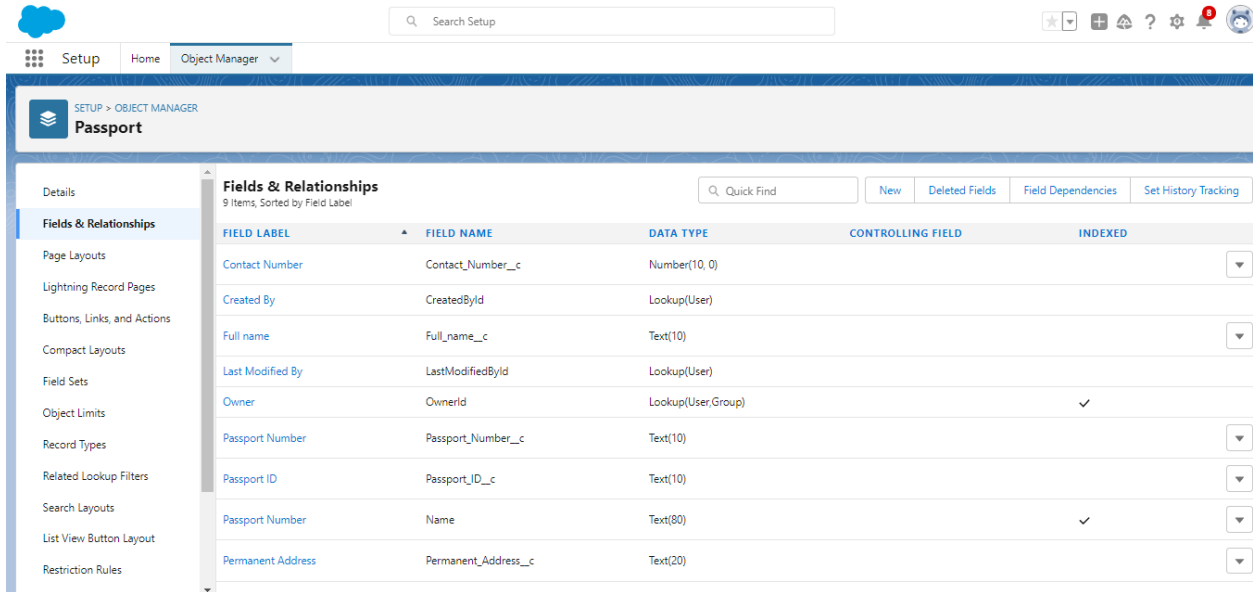
Deployed

Help Settings

Standard salesforce.com Help Window

EditDelete

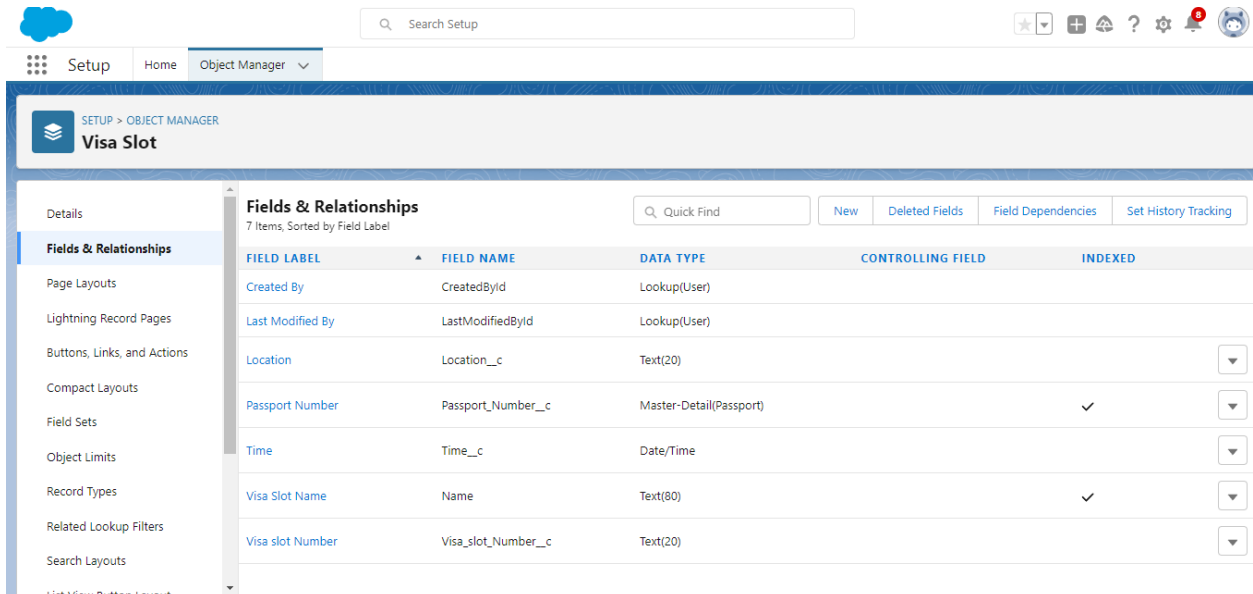
Fields and Relationship of Passport



The screenshot shows the Salesforce Setup interface for the 'Passport' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, and others. The main content area is titled 'Fields & Relationships' and shows a table of 9 fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are Contact Number, Created By, Full name, Last Modified By, Owner, Passport Number, Passport ID, Passport Number (Name), and Permanent Address.

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' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, and others. The main content area is titled 'Fields & Relationships' and shows a table of 7 fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are Created By, Last Modified By, Location, Passport Number, Time, Visa Slot Name, and Visa slot Number.

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 'App Manager' selected. 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. The table columns are: App Name, Developer Name, Description, Last Modified, App Type, and Visibility. The table lists various apps like 'All Tabs', 'Analytics Studio', 'App Launcher', 'Bolt Solutions', 'Book my Visa', 'Community', 'Content', and 'Data Manager'.

App Name	Developer Name	Description	Last Modified	App Type	Visibility
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...	Use 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' selected. 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'. The 'App Branding' section includes an 'Image' upload button, 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

Users

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

Plus

Help

Settings

Notifications

Avatar

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
Edit	Chatter_Euser	Chatter	chathv00s2w00000roiwear.vhea8eiodkvu@chatter.salesforce.com		✓	Chatter Free User
Edit	S_Swathi	SS	swathi@07.com		✓	System Administrator
Edit	S_Swathi	SS	swathistudy2020@gmail.com		✓	Standard User
Edit	User_Integration	intso	integration@00s2w00000roiwear.com		✓	Analytics Cloud Integration User
Edit	User_Security	SSC	inaphsssecurity@00s2w00000roiwear.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](#)

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](#)

Report

Sales

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Chatter

Groups

Calendar

More

Search...

Star

Plus

Help

Settings

Notifications

Avatar

Reports

Recent

2 items

Search recent reports...

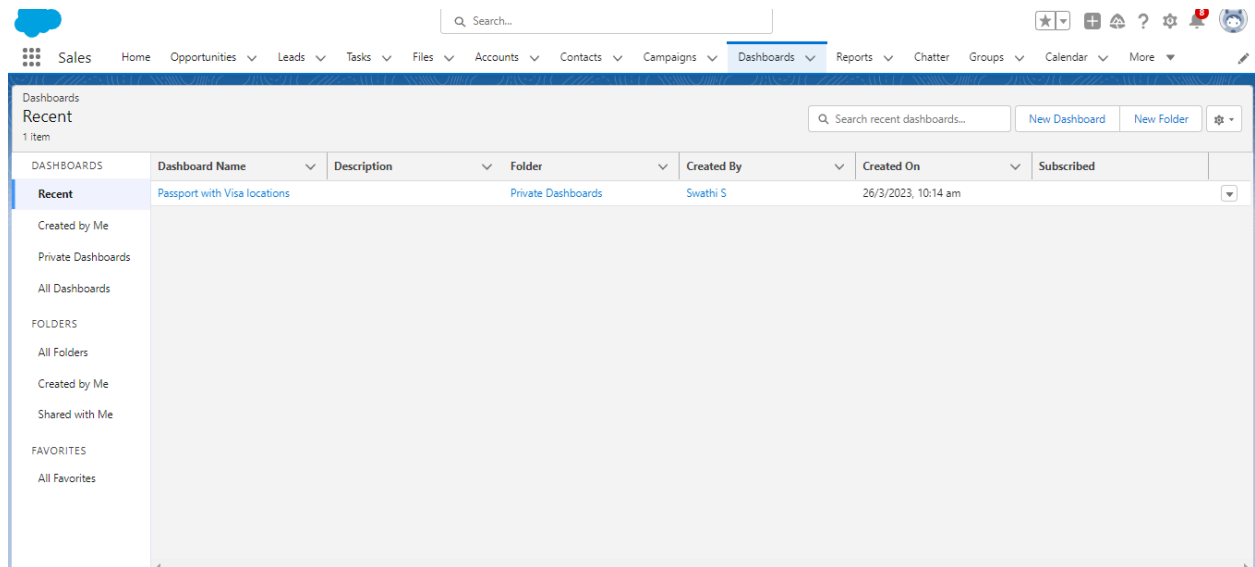
New Report

New Folder

Settings

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	
Created by Me	Passport with Visa location		Private Reports	Swathi S	26/3/2023, 10:13 am	
Private Reports						
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

Dashboard



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:

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).

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.