

## CRM application that helps to book a visa slot

### 1 INTRODUCTION

#### 1.1 Overview

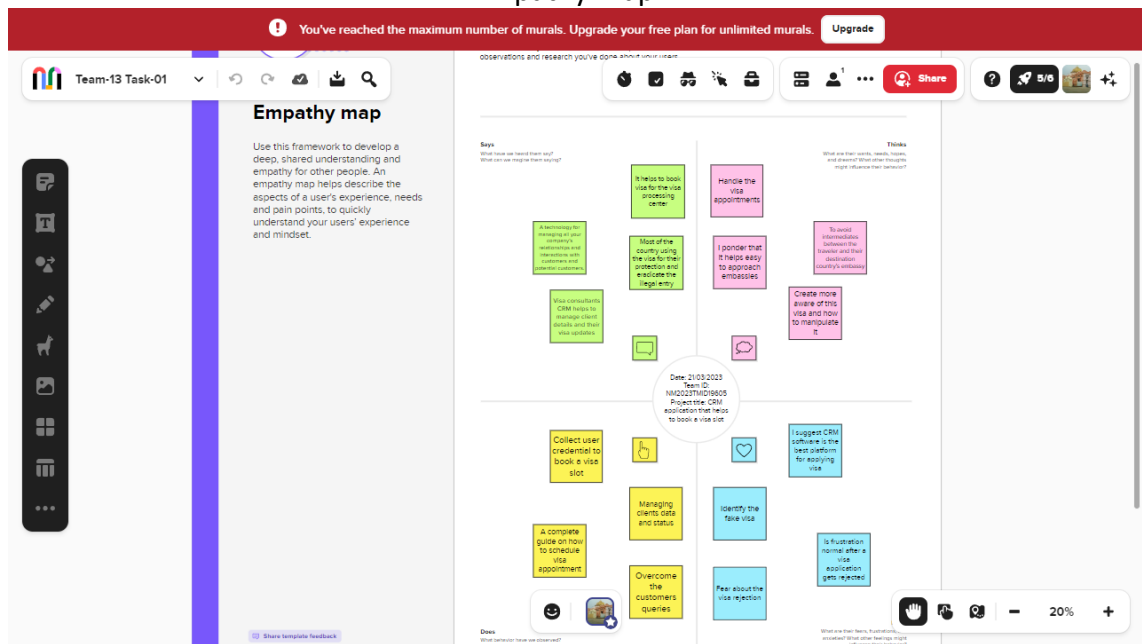
A visa slot management project is a system that is used to track and manage the availability of visa slots, which are appointments that are required for certain visa applications. It might be used by a government agency or a visa processing center to schedule and manage appointments with applicants.

#### 1.2 Purpose

Salesforce is used for streamlining sales, service, and marketing activities via industry-specific products and seamless software integration. It offers solutions for various needs such as Sales Cloud, Service Cloud, Marketing Cloud, Community Cloud, Field Services, CPQ and Billing etc.

### 2 Problem Definition & Design Thinking

#### 2.1 Empathy Map





## 3 RESULT

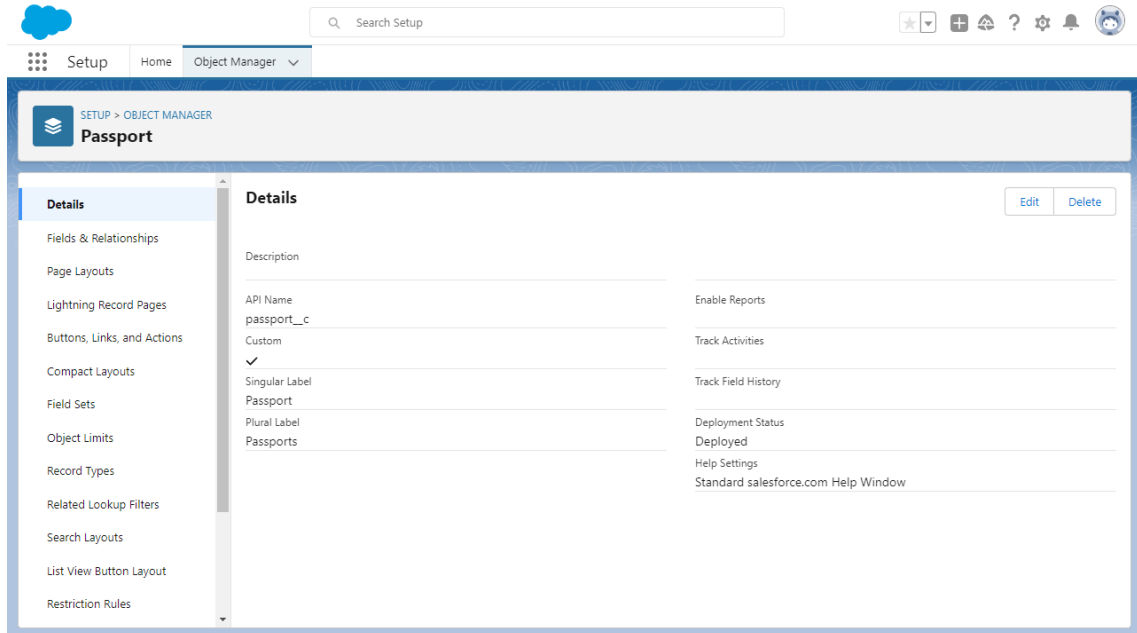
### 3.1 Data Model:

Object name	Fields in the object	
Passport	<b>Field label</b>	<b>Data Type</b>
	Full name	Text
	Passport number	Text
	Contact number	number
	Permanent address	Text
Visa slot	<b>Field label</b>	<b>Data Type</b>
	Location	Text
	Time	Time
	Passport number	Master
	Visa slot number	Text
Payment	<b>Field Label</b>	<b>Data type</b>
	Payment mode	Text
	Card number	Text
	Transaction ID	Auto number
	Cancel transaction	Text
Reschedule	<b>Field label</b>	<b>Data type</b>
	Passport number	Master
	Location	Text
	Time	Time
	Cancel	Text
	Status	Text

## 3.2. Activity & Screenshot

### Objects and fields that we created

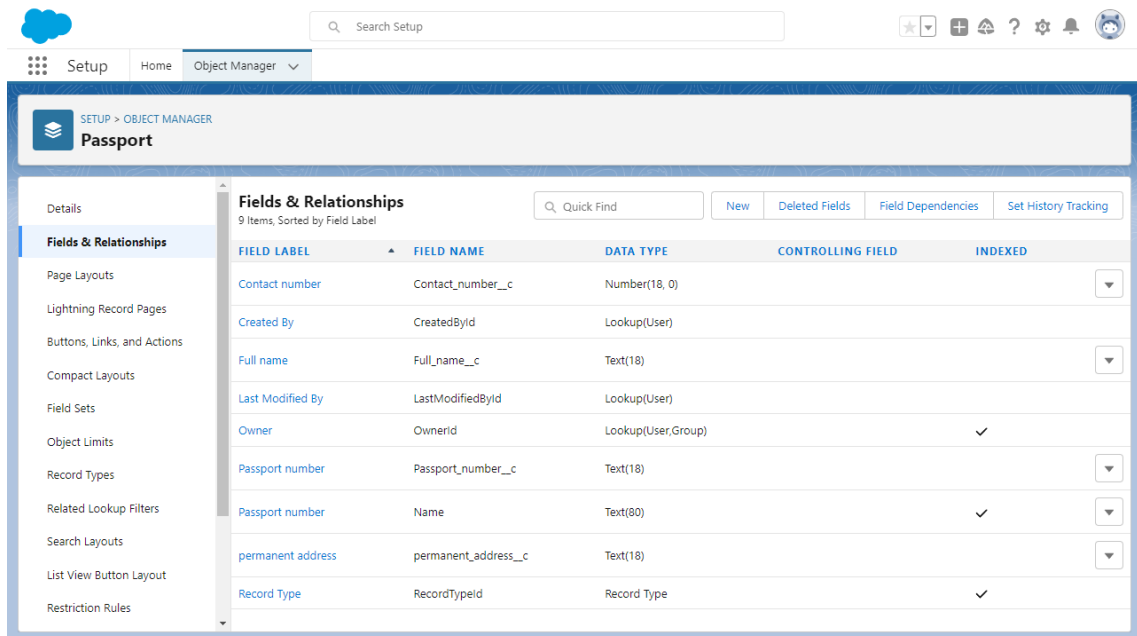
#### Passport



The screenshot shows the Salesforce Setup interface for the 'Passport' object. The left sidebar contains a list of configuration 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, List View Button Layout, and Restriction Rules. The 'Details' section is selected, showing the following information:

- Description:** (Empty 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
- Help Settings:** Standard salesforce.com Help Window

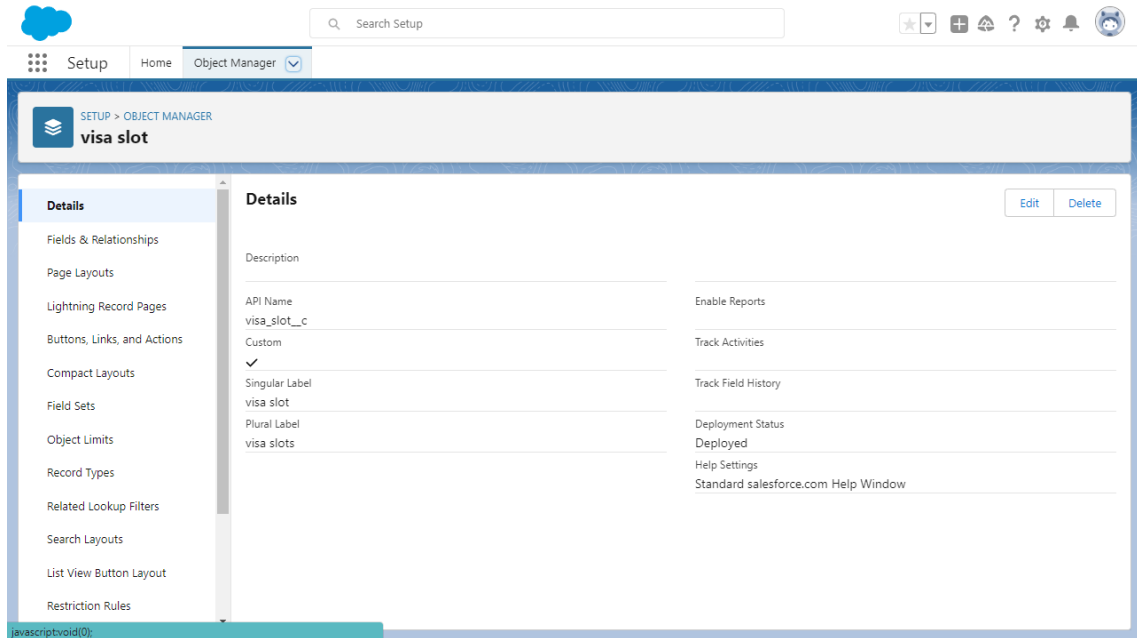
#### Fields in the passport object



The screenshot shows the Salesforce Setup interface for the 'Passport' object, specifically the 'Fields & Relationships' section. The left sidebar is the same as the previous screenshot. The 'Fields & Relationships' section is selected, showing a list of 9 fields, sorted by Field Label. The fields are as follows:

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	Passport_number__c	Text(18)		
Passport number	Name	Text(80)		✓
permanent address	permanent_address__c	Text(18)		
Record Type	RecordTypeId	Record Type		✓

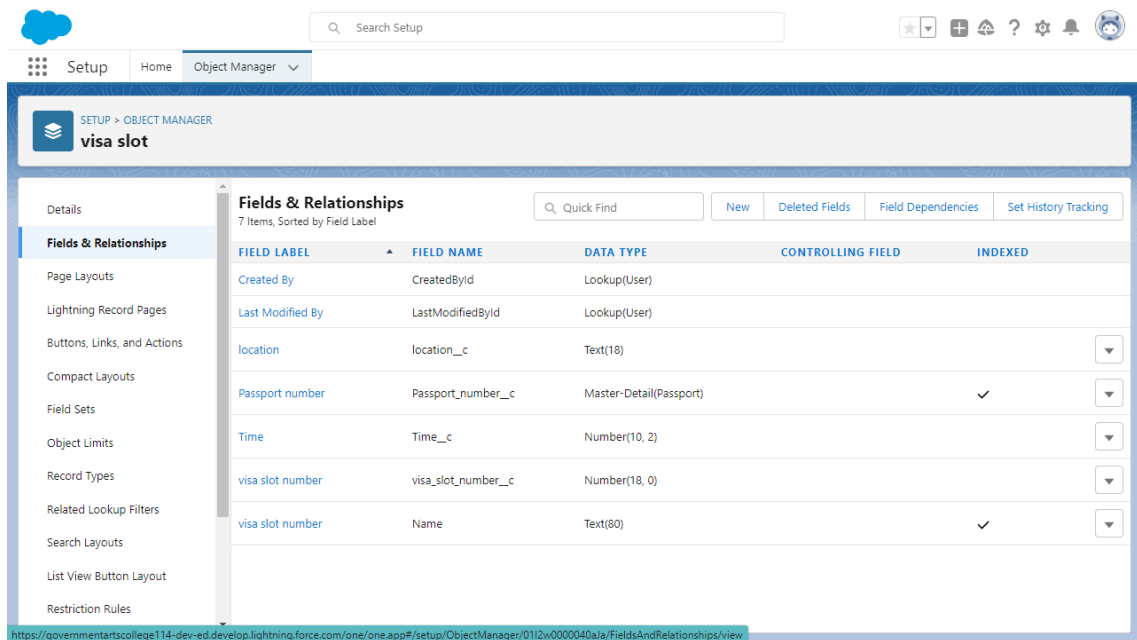
## Visa slot object



The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The 'visa slot' object is highlighted in the left sidebar. The main content area displays the 'Details' section for the 'visa slot' object, which includes a list of fields and relationships on the left and a 'Details' section on the right. The 'Details' section includes fields for 'Description', 'API Name', 'Custom', 'Singular Label', 'Plural Label', 'Enable Reports', 'Track Activities', 'Track Field History', 'Deployment Status', 'Help Settings', and 'Standard salesforce.com Help Window'.

Field Label	Field Name	Data Type	Controlling Field	Indexed
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
location	location__c	Text(18)		
Passport number	Passport_number__c	Master-Detail(Passport)		✓
Time	Time__c	Number(10, 2)		
visa slot number	visa_slot_number__c	Number(18, 0)		
visa slot number	Name	Text(80)		✓

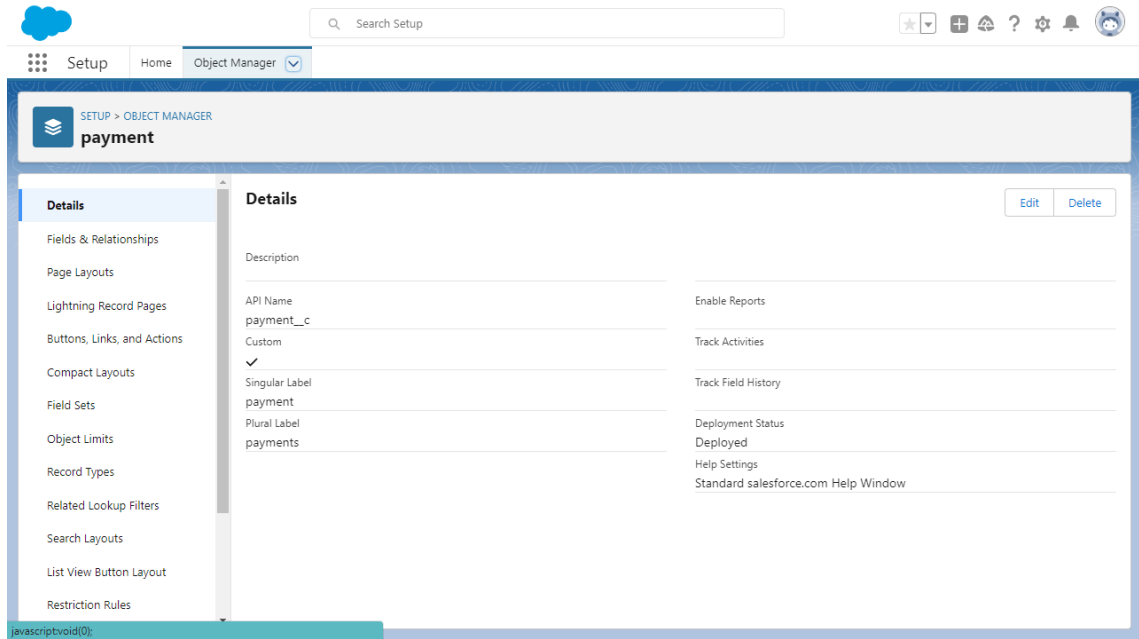
## Fields in the visa slot object



The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. The 'visa slot' object is highlighted in the left sidebar. The main content area displays the 'Fields & Relationships' section for the 'visa slot' object, which includes a list of fields and relationships on the left and a 'Fields & Relationships' section on the right. The 'Fields & Relationships' section includes a table with columns for 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
location	location__c	Text(18)		
Passport number	Passport_number__c	Master-Detail(Passport)		✓
Time	Time__c	Number(10, 2)		
visa slot number	visa_slot_number__c	Number(18, 0)		
visa slot number	Name	Text(80)		✓

## Payment object



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

Restriction Rules

**Details**

Description

API Name  
payment\_\_c

Custom

✓

Singular Label  
payment

Plural Label  
payments

Enable Reports

Track Activities

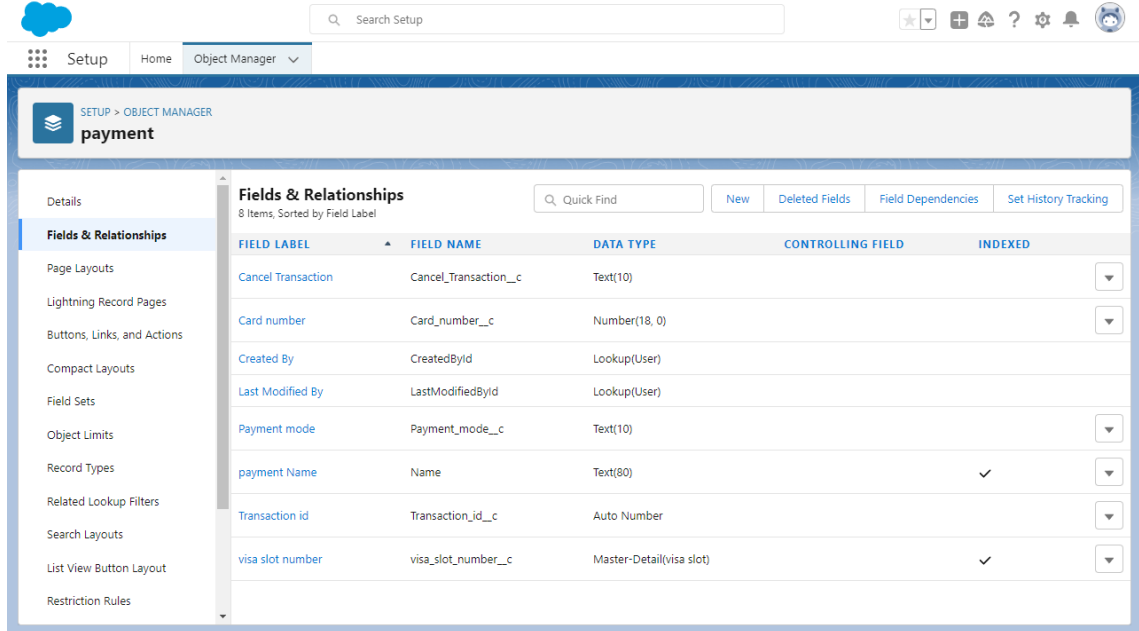
Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

Edit Delete

## Fields in the Payment object



Setup > OBJECT MANAGER

**payment**

**Fields & Relationships**

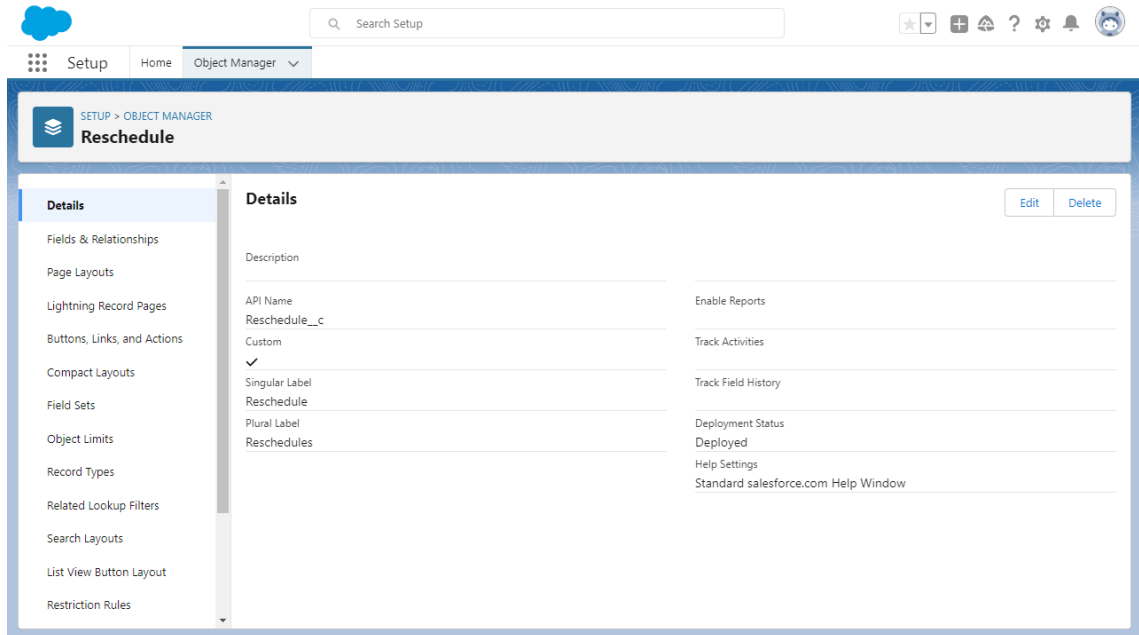
8 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Cancel Transaction	Cancel_Transaction__c	Text(10)		
Card number	Card_number__c	Number(18, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Payment mode	Payment_mode__c	Text(10)		
payment Name	Name	Text(80)		✓
Transaction id	Transaction_id__c	Auto Number		
visa slot number	visa_slot_number__c	Master-Detail(visa slot)		✓

## Reschedule object



**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

Restriction Rules

**Details**

Description

API Name  
Reschedule\_\_c

Custom  
✓

Singular Label  
Reschedule

Plural Label  
Reschedules

Enable Reports

Track Activities

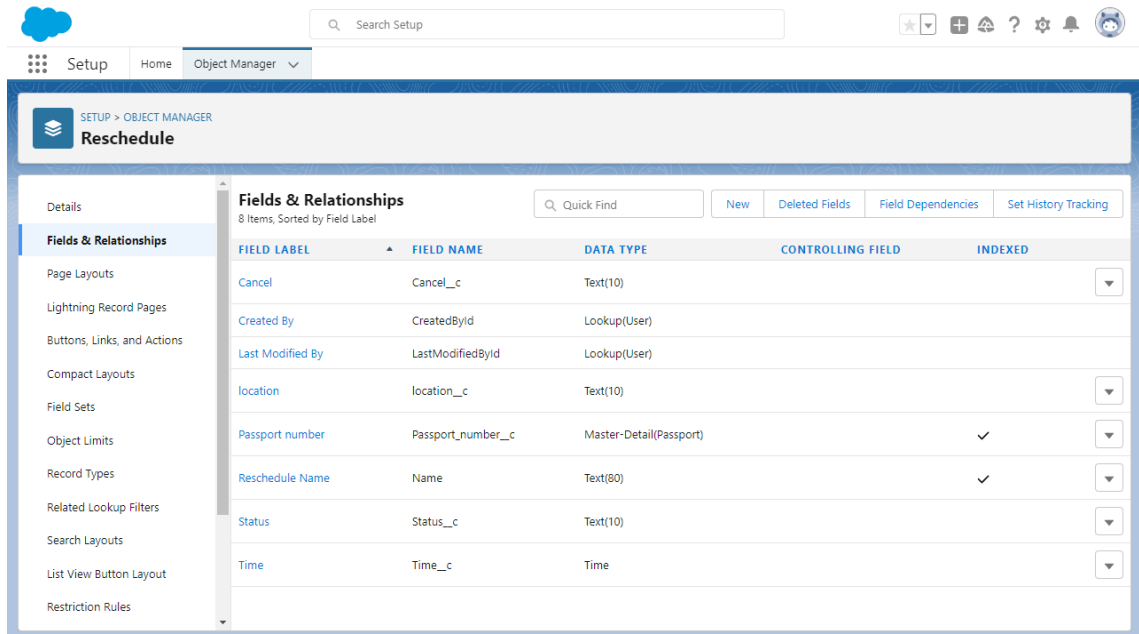
Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

Edit Delete

## Fields in the Reschedule object



**Reschedule**

**Fields & Relationships**

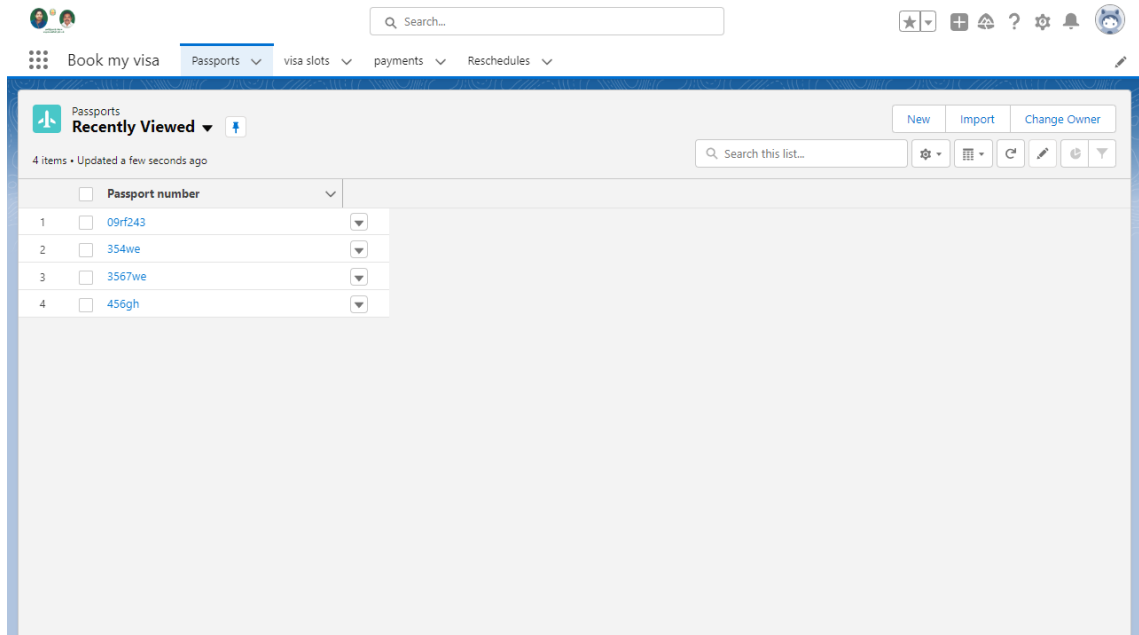
8 Items, Sorted by Field Label

Q, Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Cancel	Cancel__c	Text(10)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Location	location__c	Text(10)		
Passport number	Passport_number__c	Master-Detail(Passport)		✓
Reschedule Name	Name	Text(80)		✓
Status	Status__c	Text(10)		
Time	Time__c	Time		

## Book my visa app



Book my visa app

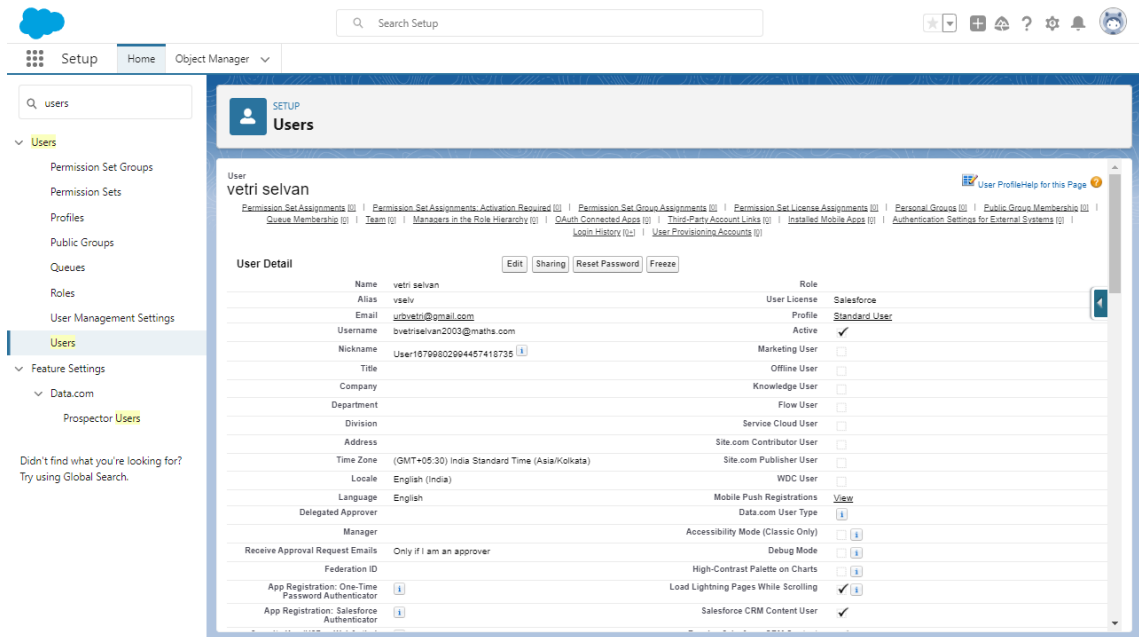
Passports

Recently Viewed

4 items • Updated a few seconds ago

	Passport number
1	09rf243
2	354we
3	3567we
4	456gh

## User



User

vetri selvan

User Detail

Name	vetri selvan	Role	Salesforce
Alias	vselv	User License	Standard User
Email	vetri@vetri@gmail.com	Profile	Standard User
Username	bvetri@vetri2003@maths.com	Active	<input checked="" type="checkbox"/>
Nickname	User16799802994457418735	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	<input type="checkbox"/>
Delegated Approver		Data.com User Type	<input type="checkbox"/>
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>
Receive Approval Request Emails	Only if I am an approver	Debug Mode	<input type="checkbox"/>
Federation ID		High-Contrast Palette on Charts	<input type="checkbox"/>
App Registration: One-Time Password Authenticator		Load Lightning Pages While Scrolling	<input checked="" type="checkbox"/>
App Registration: Salesforce Authenticator		Salesforce CRM Content User	<input checked="" type="checkbox"/>



## Reports

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⚙️
🔔

Book my visa
Passports ▾
visa slots ▾
payments ▾
Reschedules ▾
\* Passports with visa locatio... ▾ ×

**Report: Passports with visa locations**  
**Passports with visa locations Report**

[Enable Field Editing](#)
Q
Add Chart
▾
C
Edit
▾

Total Records  
**4**

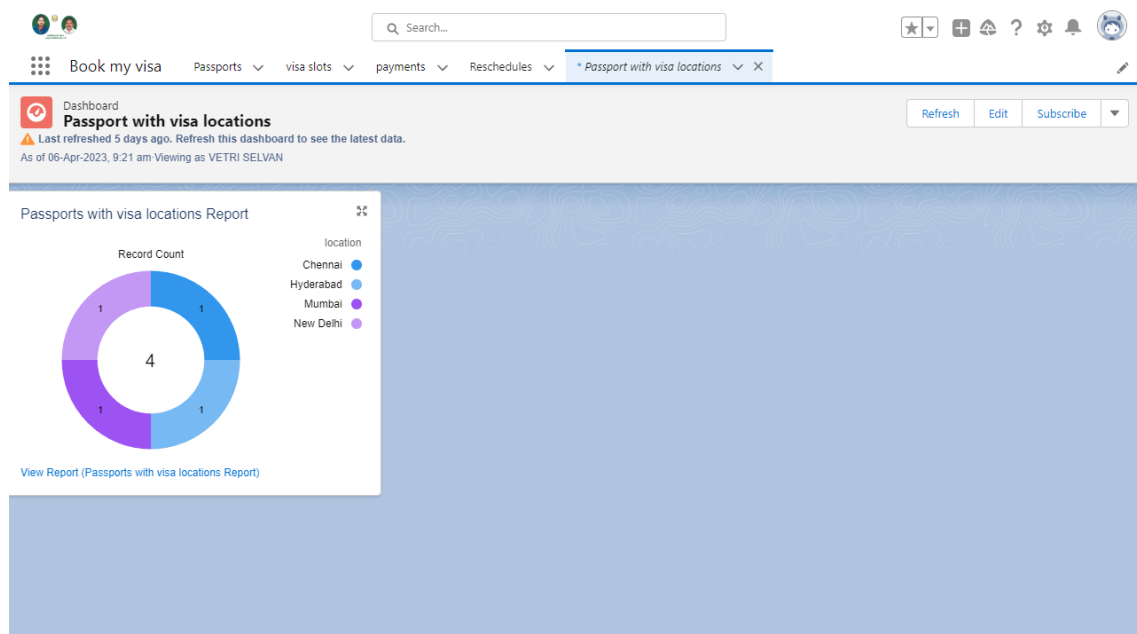
location ▾	Passport ID → ▾	a052w0000GgTV	a052w0000GgTp	a052w0000GgTz	a052w0000GgU4	Total
<input type="checkbox"/> Chennai	Record Count	1	0	0	0	1
<input type="checkbox"/> Hyderabad	Record Count	0	0	0	1	1
<input type="checkbox"/> Mumbai	Record Count	0	0	1	0	1
<input type="checkbox"/> New Delhi	Record Count	0	1	0	0	1
<b>Total</b>	Record Count	1	1	1	1	<b>4</b>

**Details (4 Rows)** ⓘ Click an intersection in the table above to filter details.

	Passport number ▾	visa slot number ▾
1	09rt243	V-0001
2	456gh	V-0004
3	3567we	V-0003
4	354we	V-0002
5		

Row Counts ☒
Detail Rows ☒
Grand Total ☒
Stacked Summaries ☒

## Dashboard



## 4 Trailhead Profile Public URL

Team Lead -

<https://trailblazer.me/id/vbalakrishnan23>

Team Member 1 –

<https://trailblazer.me/id/sansk105>

Team Member 2 –

<https://trailblazer.me/id/vickd7>

Team Member 3 –

<https://trailblazer.me/id/nbabu130>

## 5 Advantages and disadvantages

### Advantages

- All team members can gather insights and data and work together to provide exceptional customer-centric experiences.
- Data organized and presented by a CRM platform leads to a better understanding of customers. This leads to better messaging and outreach, much of which can be done with automation, which helps you offer better, more efficient customer service.
- Furthermore, your teams can collaborate more easily and reduce siloes. Of all the benefits of CRM software, using data and technology to power a more efficient company is one of the biggest.
- This helps you manage customer relationships more effectively, leading to better business.

### Disadvantages

- Expensive.
- You have to pay for add-ons to get the most out of the software.
- Configuration and setup is complex and time-consuming.
- Cluttered interface makes navigation and simple tasks unnecessarily complex.
- The learning curve never seems to end.
- Customer support has a poor reputation.

## 6 APPLICATIONS

- **Salesforce is a cloud-based Customer Relationship Management (CRM) platform that enables businesses to manage customer data, sales operations, and marketing campaigns.**
- **Salesforce is the world's #1 customer relationship management (CRM) platform. We help your marketing, sales, commerce, service and IT teams work as one from anywhere — so you can keep your customers happy everywhere.**
- **Customer relationship management (CRM) is a technology for managing all your company's relationships and interactions with customers and potential customers.**
- **The goal is simple: Improve business relationships. A CRM system helps companies stay connected to customers, streamline processes, and improve profitability.**

## 7 CONCLUSION

**Customer Relationship Management enables a company to align its strategy with the needs of the customer in order to best meet those needs and thus ensure long-term customer loyalty.**

**Our cloud-based CRM applications for sales, service, marketing, and more don't require IT experts to set up or manage – simply log in and start connecting to customers in a whole new way. More than 150,000 companies use Salesforce CRM to grow their businesses by strengthening customer relationships.**

## 8 FUTURE SCOPE

**Salesforce training would be a natural choice, as more and more businesses are adopting Salesforce for their Customer Relationship Management(CRM) and marketing plans. You may also be an eCommerce practitioner or sales executive with a stagnant career path, exploring an upskilling course.**