

CRM APPLICATION THAT HELPS TO BOOKS A VISA SLOT

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CRM Application That helps to Book a Visa Slot

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.

Milestone-1 : Creation of developer org

Introduction

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<https://youtu.be/r9EX3IGde5k>

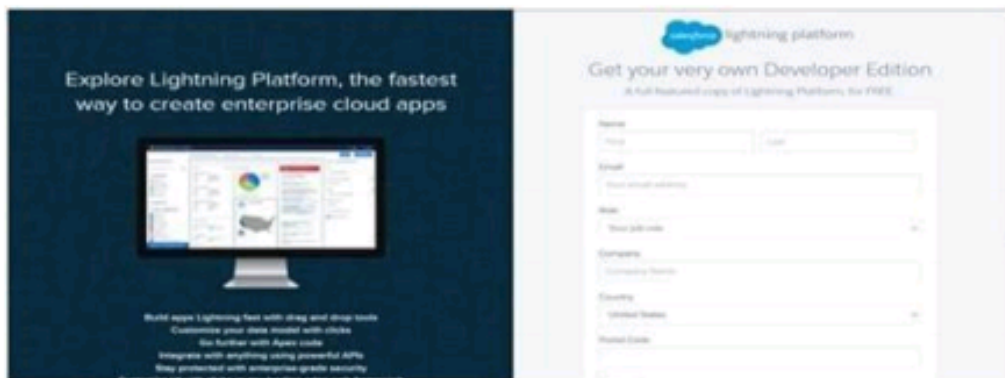
Activity 1:

Creating Developer Account

Creating a developer org in salesforce.

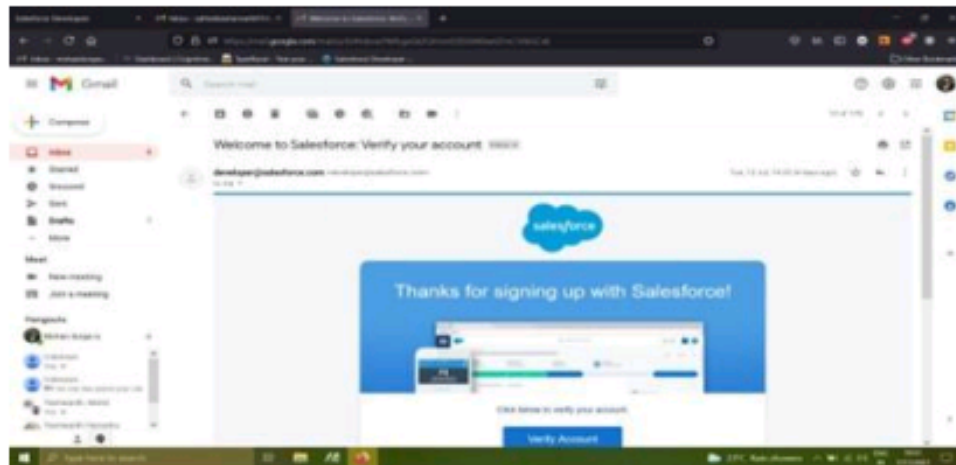
1. Go to developers.salesforce.com/
2. Click on sign up.
3. On the sign up form, enter the following details :
 1. First name & Last name
 2. Email
 3. Role : Developer
 4. Company : College Name
 5. Country : India
 6. Postal Code : pin code
 7. Username : should be a combination of your name and company
This need not be an actual email id, you can give anything in the format :
username@organization.com

Click on sign up after filling these.



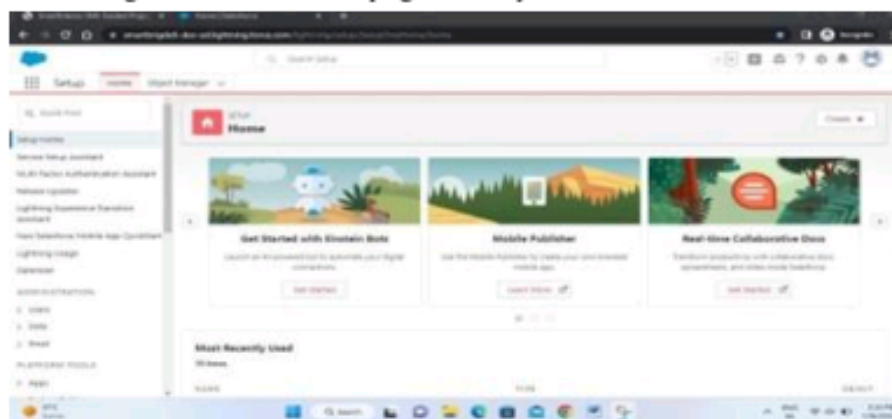
Account Activation

Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins, as



Login To Your Salesforce Account

1. Go to salesforce.com and click on login.
2. Enter the username and password that you just created.
3. After login this is the home page which you will see.



Salesforce Login

<https://login.salesforce.com>

Milestone-2: Objects:

Objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types: 1) Standard objects.

2) custom objects.

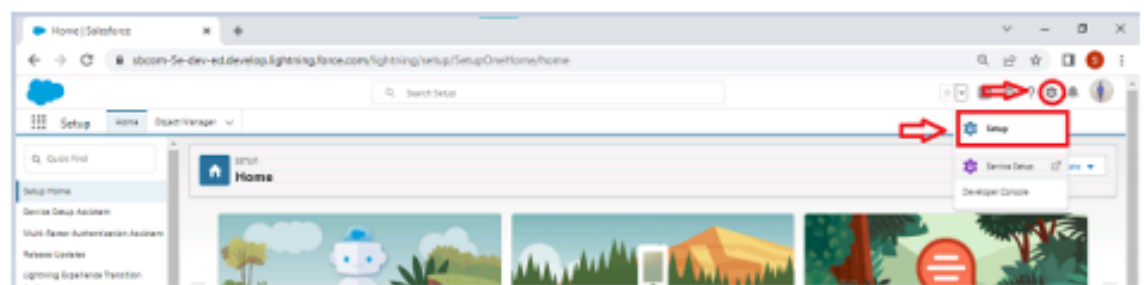
Objects involved in Book my visa are:

| Objects | Passport | Visa slot | Payment | Reschedule/Cancel |
|---------|-------------------|--------------------------|------------------------------|-------------------------|
| Fields | Full name | Location | Payment Mode | passport number(Master) |
| Fields | Passport number | Time | Card Number | Location |
| Fields | Contact number | Passport number (Master) | Transaction id (Auto number) | Time |
| Fields | Permanent address | Visa slot number | Cancel Transaction | Cancel |
| | | | Visa slot number(Master) | Status |

Activity-1:

Creation of custom object: Passport

- 1) Navigate to setup and select object manager.



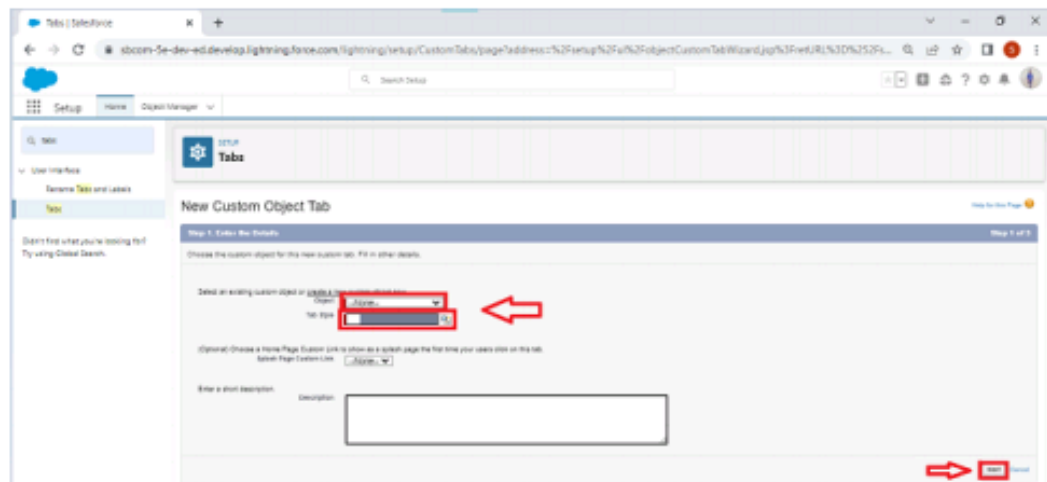
- 2) At the top of the right side there you can find create custom object.



- 3) You will navigate to custom object definition edit where you have to give the object name.
- 4) The label name has Passport and Plural label has Passports.

The screenshot shows the Salesforce 'New Custom Object' setup page. The page is titled 'New Custom Object' and shows the 'Custom Object Definition Edit' form. Red boxes and arrows highlight the 'Label' and 'Plural Label' fields, which are both set to 'Passport'. The 'Object Name' field is also highlighted with a red box and arrow, set to 'Passport'. The 'Description' field is empty. The 'Record Name' field is set to 'Passport Number' and the 'Data Type' is set to 'Text'. The 'Deployment Status' is set to 'Deployed'.

- 5) In enter record name label and format enter name record name has passport number
- 6) And the data type has text.
- 7) In deployment status select deployed option.
- 8) Ensure that you have to select at least one option in the object creation option; it is available only once when a custom object is created.
- 9) Then click on next you will navigate to the new custom object tab where you have to select tab style and click on next.



- 10) After tab selection you will be navigated to add to profiles select default on click on next.
- 11) Thereafter you have to select a custom app select include tab so that object will be available in all objects and select save option.

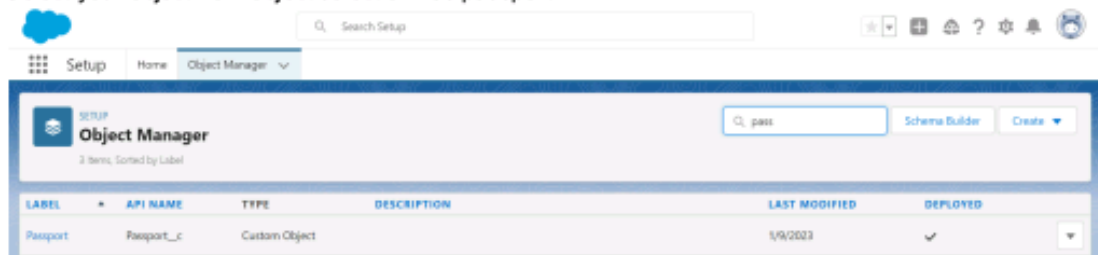
Activity-2:

Fields available on custom object: Passport

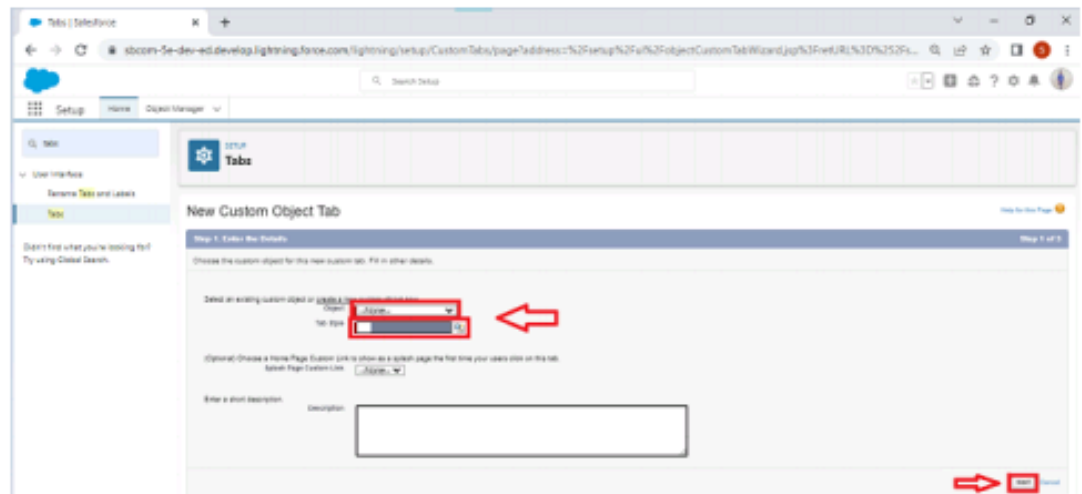
| Field Name | Data Type |
|----------------------|-----------|
| 1) Contact Number | Number |
| 2) Full Name | Text |
| 3) Passport Number | Text |
| 4) Permanent Address | Text |

Creation of fields on custom Object: Passport

- 1) Select your object from object selection has passport.



- 2) And select the option fields and relationships.



- 10) After tab selection you will be navigated to add to profiles select default on click on next.
- 11) Thereafter you have to select a custom app select include tab so that object will be available in all objects and select save option.

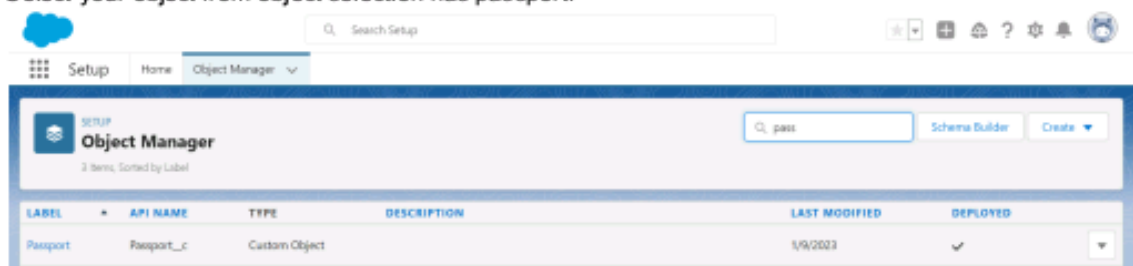
Activity-2:

Fields available on custom object: Passport

| Field Name | Data Type |
|----------------------|-----------|
| 1) Contact Number | Number |
| 2) Full Name | Text |
| 3) Passport Number | Text |
| 4) Permanent Address | Text |

Creation of fields on custom Object: Passport

- 1) Select your object from object selection has passport.



- 2) And select the option fields and relationships.

Setup Home Object Manager

SETUP > OBJECT MANAGER
Passport

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters

Fields & Relationships
8 Items, Sorted by Field Label

Q, Quick Find New Deleted Fields Field Dependencies Set Histo

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|-------------------|--------------------|-------------------|---------|
| Check | Check__c | Checkbox | | |
| Contact Number | Contact_Number__c | Number(13, 0) | | |
| Created By | CreatedById | Lookup(User) | | |
| Full Name | Full_Name__c | Text(255) | | |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Owner | OwnerId | Lookup(User/Group) | | ✓ |
| Passport Number | Name | Text(30) | | ✓ |

- 3) At the top right side you can find a new select that option.
- 4) Now you have to select data type, select number has data type.
- 5) And you will navigate to enter the details page where you give the field label.

Setup Home Object Manager

SETUP > OBJECT MANAGER
Passport

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters

Field Label:

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length: Decimal Places:

Number of digits to the left of the decimal point Number of digits to the right of the decimal point

Field Name:

Description:

Help Text:

Required: ☐ Always require a value in this field in order to save a record
Unique: ☐ Do not allow duplicate values

Previous Next Cancel

- 6) And give the label name has Contact number.
- 7) And length should be 10 at the bottom of the object 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.
- 8) Click next you will navigate to field level security click on visible checkbox so that it is visible to all profiles.
- 9) Select the next option, select the page layout and save it.

Milestone-3: Relationship B/w Objects:

Relationship in Salesforce is a 2-way association between 2 objects. Using relationships we can link objects with each other and we can make connections and display data about other related objects

There are two type of relationships:

- 1) Master detail relationship: A master-detail relationship defines the relationship between the parent and the child. The master table defines the parent relation and the detail defines the child relation. If the master table is deleted then the child record data is also deleted
- 2) Look up relationship: Lookup Relationship in Salesforce links two objects together but has no effect on deletion or security.
- 3) Many to many relationship: Records of a particular object can connect with various records of different objects and vice versa.

Activity-1:

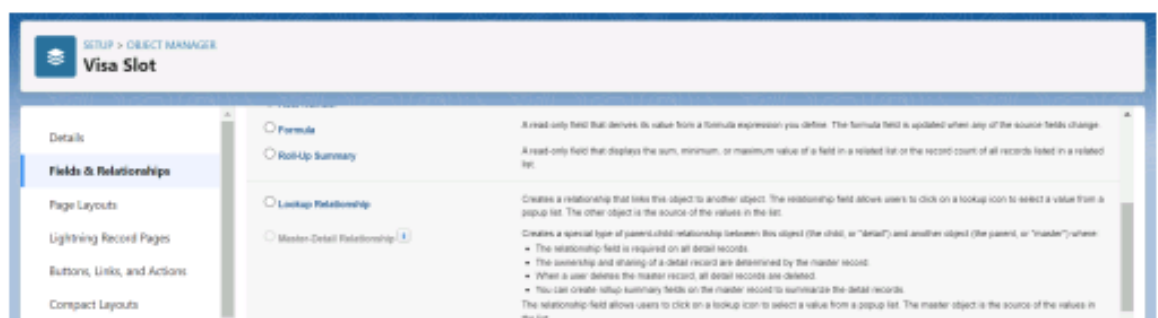
Creation of Relationship:

To create a Master Detail relationship between Passport and Visa.

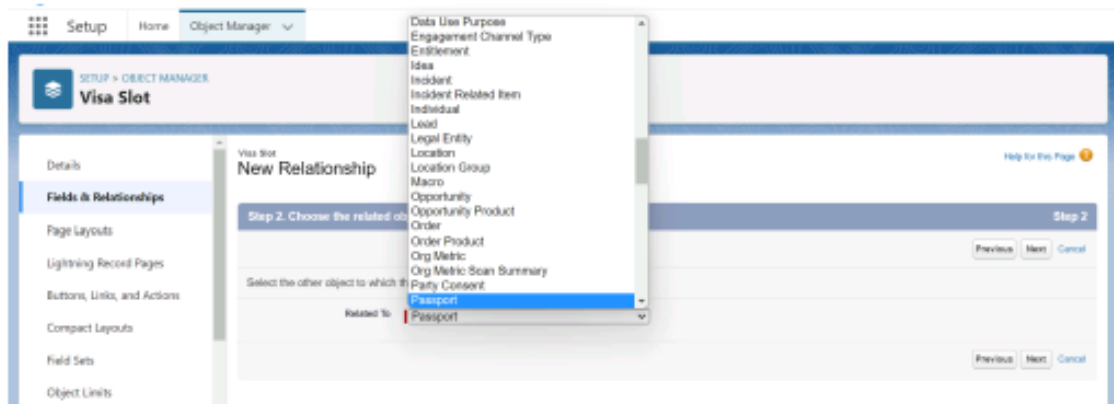
- 1) Go to the Set Up option from the Home Page and click on it.
- 2) Go to the object manager and select 'visa' object from the list



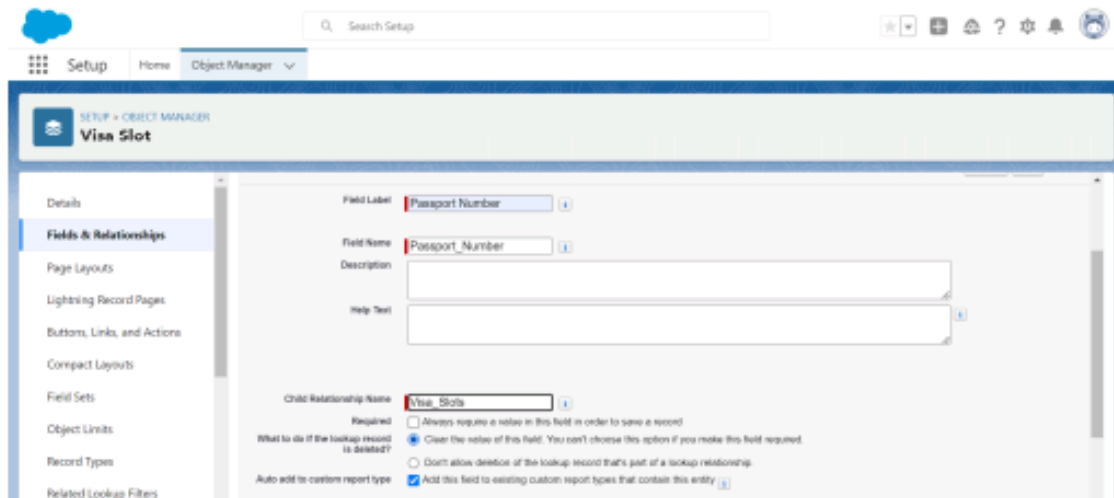
- 3) And select fields and relationships and click on new.
- 4) Select the data type has Master detail relationship



- 5) And select related to the object has passport, and click on next



- 6) You will navigate to the label name page where you give the label name for the field, give it has passport number and click next.



- 7) Select visible for all profiles in field level security and select page layout in next page and save it.

Milestone-4 App:

Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

There are two types of Salesforce Applications:

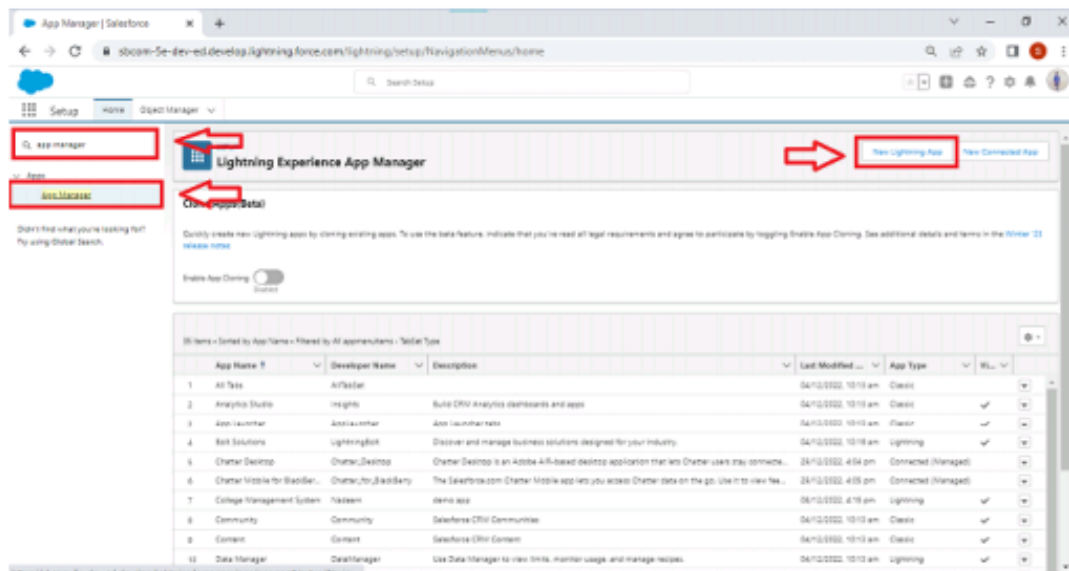
- 1) Standard App
- 2) Custom Apps

Activity:

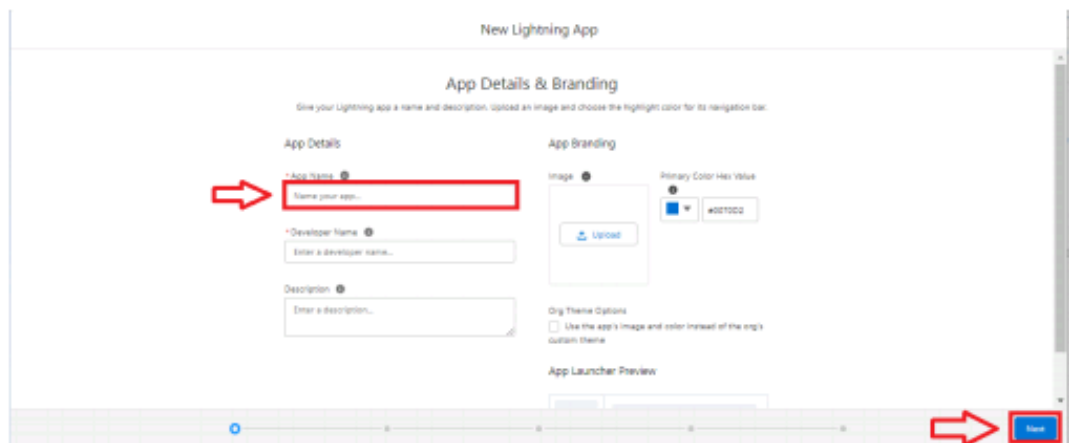
Creation of App

An app is a collection of items that work together to serve a particular function. Salesforce apps come in two flavors: Classic and Lightning.

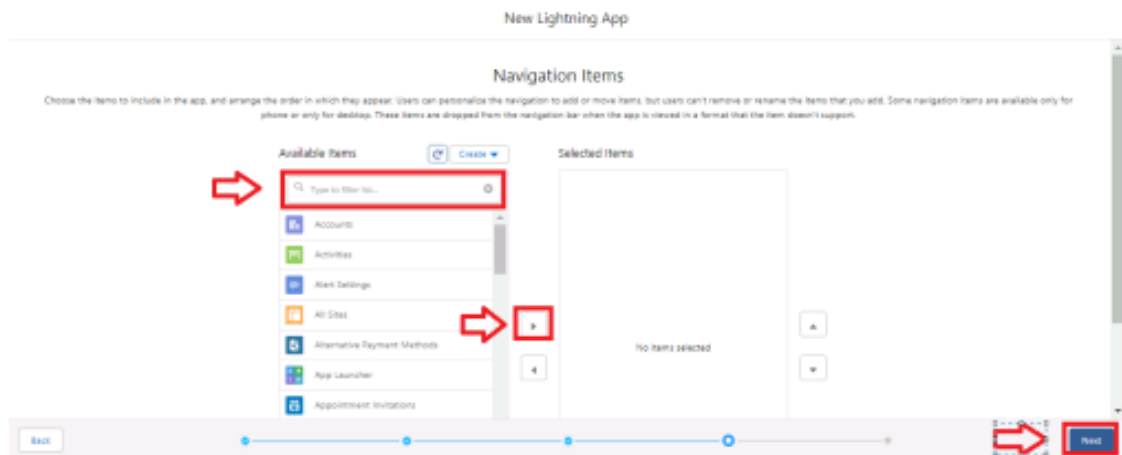
- 1) Navigate to setup and search for app manager



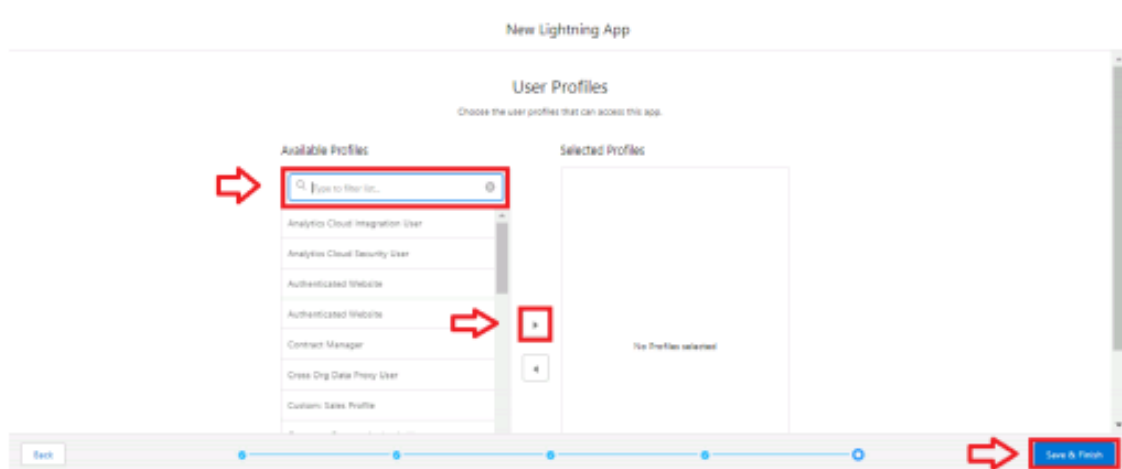
- 2) And select an option for a new lightning app.
- 3) Give the app name has book my visa.



- 4) Upload the picture and click next.
- 5) Choose the app option as navigation style- standard navigation, support from factors-desktop & mobile and select next.
- 6) And move the objects from available items to selected items.
- 7) Passport, visa slots, payments, reschedule/cancel to selected items.



- 8) And system admin profile to available items to selected items.



- 3) Give the first name and last name.
- 4) Enter your email in the email field.
- 5) Enter username; it must be unique.
- 6) Select the user license of salesforce.
- 7) In the profile field select standard user.

The screenshot shows the 'New User' page in Salesforce Setup. The left sidebar contains navigation links for Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Quizzes, Roles, and User Management Settings. The main content area is titled 'New User' and includes a 'User Edit' section with a 'Save' button. Below this is the 'General Information' section with fields for First Name, Last Name, Alias, Email, Username, Password, Title, Company, Department, and Division. To the right of these fields is a 'Role' dropdown menu. Red arrows point to the 'Save' button, the 'First Name' field, and the 'Role' dropdown menu.

- 8) At the bottom of the page check the box to generate a new password and notify the user immediately.

Activity-2:

OWD:organization wide default settings,

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

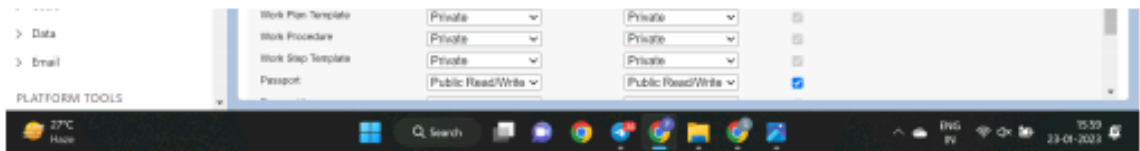
- 1) Navigate to setup in quick find search bar
- 2) Type sharing settings and you will navigate to the sharing settings page.

The screenshot shows the 'Sharing Settings' page in Salesforce Setup. The left sidebar contains navigation links for Security, Sharing Settings, and Didn't find what you're looking for? Try using Global Search. The main content area is titled 'Sharing Settings' and includes a 'Manage sharing settings for:' dropdown menu. Below this is the 'Default Sharing Settings' section with a table of 'Organization-Wide Defaults'.

| Object | Default Internal Access | Default External Access | Grant Access Using Hierarchies |
|---------------------|----------------------------|-------------------------|--------------------------------|
| Lead | Public Read/Write Transfer | Private | ✓ |
| Account and Contact | Public Read/Write | Private | ✓ |
| Contact | Public Read/Write | Private | ✓ |
| Order | Controlled by Parent | Controlled by Parent | ✓ |
| Asset | Controlled by Parent | Controlled by Parent | ✓ |

- 3) Go down to the page and select owd.

- 4) And click edit on the owd.
- 5) Navigate to the bottom of the page and select the passport object.
- 6) And change the default external access to public/Read/write.



Milestone-6 Reports:

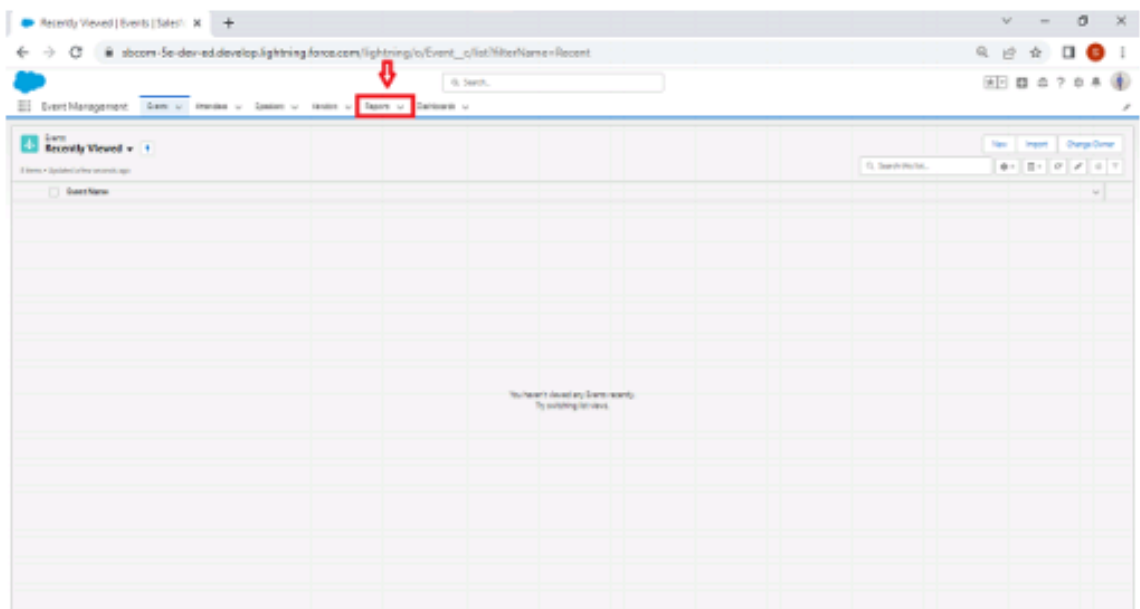
A report is a list of records that meet the criteria you define. It's displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

Activity-1:

Creation of report

Note- While creation of report ensure that update preview automatically is selected which is available at the right side of the report page.

- 1) Click on the app launcher and search for reports.



- 2) And select a new report, for the record type category select other reports.

The screenshot shows the Salesforce Reports interface. At the top, there's a search bar and navigation tabs. The 'New Report' button is highlighted with a red box and a red arrow. Below it, a table lists various reports, including 'New Support Report', 'New Products with Category ID Report', 'Sales Rep Win Rates', 'Sample Test Report Green Test', 'Accounts by Market', 'Open Support Cases', 'Travel Accounts by Date', 'High Value Accounts', 'General and Sales Target Accounts', 'Users Not Logged In Last 7 Days', 'Opportunities by Rep', 'Pipeline Metrics Report Current FY', 'Opportunities by Rep and Close Month', and 'Hotel reservation for report'.

- 3) Select passport with visa slots for the report type name.
- 4) Select the start button to create a new report.

The screenshot shows the Salesforce Report Builder interface. The report is titled 'Passport with Visa Slots with Payments'. The 'Outline' pane on the left shows the report structure with 'Location' selected for group rows and 'Passport ID' for group columns. The main table displays data for various locations and passport IDs, with a 'Total' row at the bottom. The table has columns for Location, Passport ID, and Total. The 'Details' section shows a list of passport numbers and visa slot numbers.

- 5) At the left side of the report you can find an outline pane.
- 6) In the group rows select location.
- 7) In the group columns select passport:passport number to display.
- 8) And in columns select visa slot number.

REPORT ▼
Passport with visa locations ✓ **Passports with Visa Slots with Payments** [Get Feedback?](#) [Add Chart](#) [Save & Run](#) [Save](#) [Close](#) [Run](#)

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

Filters

Add Filter...

Show Me
All passports

Created Date
All Time

| Location | Passport ID | a042w0000vM78q | a042w0000vM78q3 | 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 |
| Total | Record Count | 3 | 2 | 5 |

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

| | Passport Number | Visa Slot Number |
|---|-----------------|------------------|
| 1 | 09-1243 | V-00002 |
| 2 | 09-1243 | V-00003 |
| 3 | 3558we | V-00004 |
| 4 | 09-1243 | V-00001 |

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

- 9) Now navigate to the filter pane available next to the outline pane and ensure in the show me section all passports is selected.
- 10) And in the passport created date select all time.
- 11) And give the label name Passports with visa locations.
- 12) Click on save and run for saving the report.

Milestone-7 Dashboards:

Dashboards in Salesforce are a graphical representation of Reports. It shows data from source reports as visual components.

Activity

Creation of Dashboard

- 1) Click on the app launcher and search for dashboards.

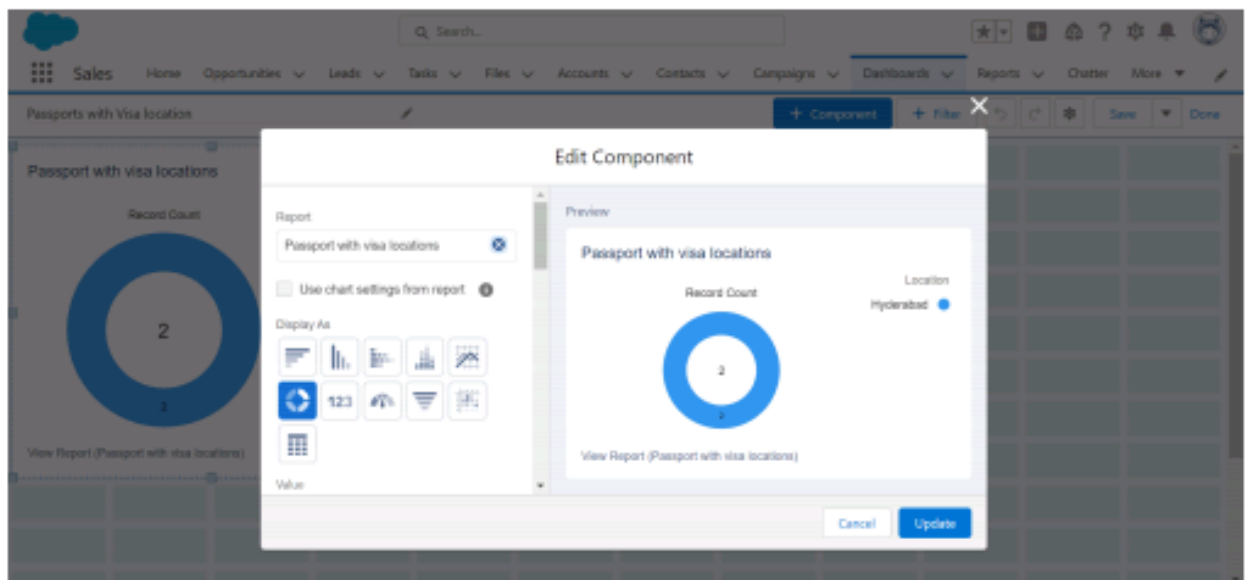
Dashboards

Recent

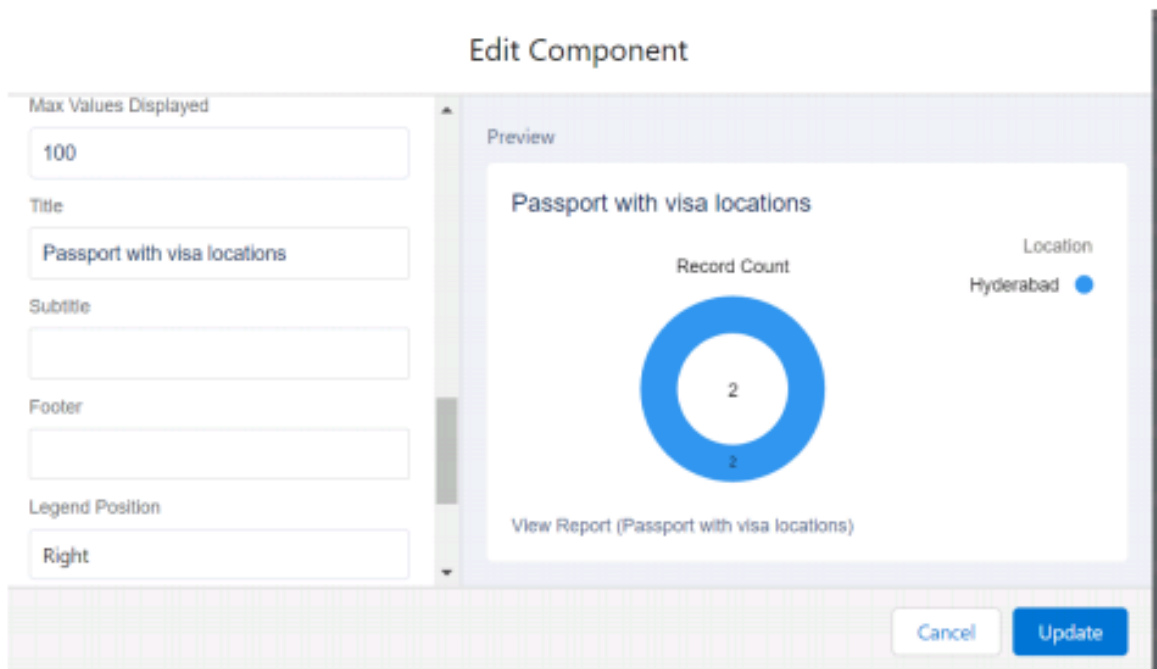
1 item

[Search recent dashboards...](#) [New Dashboard](#) [New Folder](#) [X](#)

- 2) Select the new dashboard option.
- 4) Name the dashboard has a Passport with visa locations.



- 5) And select create option.
- 6) Now click on Add component and for report select passport with locations.
- 7) Select the donut chart in display as section.
- 8) Ensure that value is record count and sliced by locations.



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

2

Location

Hyderabad

View Report (Passport with visa locations)

Cancel

Update

- 9) Leave the default values.
- 10) Click on add.
- 11) And save the dashboard.