



A CRM APPLICATION ON E-COMMERCE ACTIVITIES

PROJECT REPORT

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BONAFIDE CERTIFICATE

Certified that this project report titled “**CRM APPLICATION ON ECOMMERCE ACTIVITIES** ” is the Bonafide work of “**KAVIYA G (611420205020), SELINSHEEBHA E (611420205036), ANITHA S (611420205003), BABYSHALINI G (611420205005)**” who carried out the project work under my supervision.

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1.INTRODUCTION

Salesforce, a leading cloud-based Customer Relationship Management (CRM) platform, is a pivotal tool for organizations to manage customer data, optimize sales processes, and elevate customer interactions. Its multifaceted features include Sales Cloud, which enhances sales management through lead tracking, opportunity management, and seamless email integration. Service Cloud focuses on exceptional customer support, featuring case management, knowledge base development, and multi-channel support. Marketing Cloud empowers businesses with marketing automation, email campaigns, social media engagement, and in-depth analytics. Salesforce's hallmark is its customizability, allowing businesses to tailor the platform to meet specific requirements, while robust integration capabilities facilitate seamless connections with other business applications.

The platform equips businesses with powerful reporting and analytics tools, enabling data-driven decisions and insightful, customized reports and dashboards. Salesforce ensures mobile accessibility, enabling users to stay connected and productive while on the move. A paramount emphasis on data security and compliance guarantees data protection and privacy. Whether you're a small startup or a large enterprise, Salesforce offers scalability to accommodate your evolving needs.

Through Salesforce, organizations foster improved customer relationships, increased sales efficiency, and superior customer support. It empowers businesses to make data-driven decisions, streamline operations, and create impactful, targeted marketing campaigns. This introduction encapsulates Salesforce's capabilities and benefits, offering a concise overview for your project document, allowing for a better understanding of how the platform can contribute to your specific project goals.

2.PROJECT SPECIFICATIONS

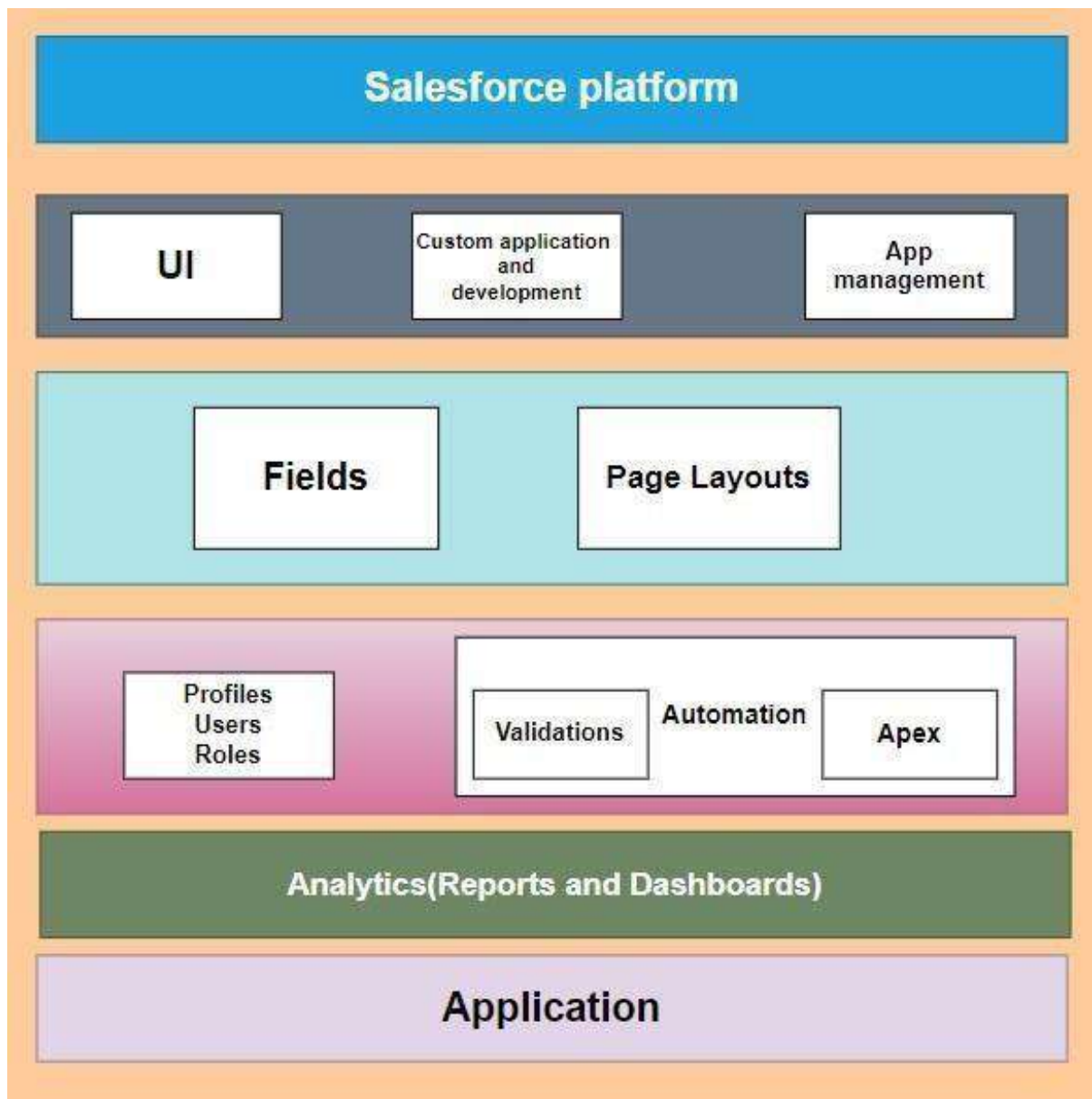
2.1 Project Goal A CRM (Customer Relationship Management) application integrated into Salesforce, specifically designed to facilitate the booking of visa slots, can greatly streamline the operations of travel and visa processing companies. The primary goal of a CRM application designed to help book visa slots is to enhance the efficiency and effectiveness of the visa application process. Simplify and expedite the visa slot booking process for applicants, making it easy for them to select suitable time slots based on their preferences. Provide real-time information on slot availability across various consulates and embassies, ensuring applicants have up-to-date access to available appointments.

2.2 Project Scope

- **Creation of Developer Account (Milestone 1):** To create a developer account for the Visa Slot Booking CRM application, visit the platform's website, select "Developer Account," and follow the registration process by providing essential information.
- **Object Creation (Milestone 2):** In the CRM application, object creation involves defining data structures for key elements like "Visa Applications" or "Appointments" to organize and manage essential booking and application information.
- **Tabs Creation (Milestone 3):** Tabs in the CRM application offer quick access to essential features, such as "Appointments," "Payments," and "Support," streamlining navigation for efficient visa slot booking and management.
- **Relationship Between Objects (Milestone 4):** Relations between objects in the CRM application link data, enabling connections like "Visa Applications" to "Applicants," ensuring seamless tracking of applicants' visa-related information and interactions.

- **Field Creation (Milestone 5):** Field creation in the CRM application involves defining data attributes like "Appointment Date" or "Payment Status" to store and manage crucial information for visa slot booking and processing.
- **Apps (Milestone 6):** In the CRM application, "APPS" refers to the software's mobile applications, allowing users to access and manage visa slot booking and related tasks on their mobile devices for convenience..
- **Users (Milestone 7):** In the CRM application, a "User" refers to individuals who interact with the system, including applicants booking visa slots and administrative staff managing the process..
- **User Adoption (Milestone 8):** "User adoption" in the CRM application refers to the degree to which individuals successfully integrate and regularly use the system for booking visa slots, indicating its effectiveness..
- **What are Reports? (Milestone 9):** Reports are data summaries in the CRM application, presenting key insights into visa slot booking processes, helping administrators analyze trends and performance.
- **Dashboards (Milestone 10):** Dashboards in the CRM application are visual data displays, providing at-a-glance insights on visa slot booking metrics, enhancing decisionmaking and operational efficiency.
- In summary, the CRM application for visa slot booking streamlines the entire process. It efficiently manages user data, from the creation of objects and fields to the use of tabs for navigation. The relationship between objects ensures seamless tracking, while reports and dashboards offer essential insights. User adoption and mobile apps enhance accessibility, making this CRM system a comprehensive solution for efficient and userfriendly visa slot booking and management.

2.3 Technical Requirements



2.4 Functional Requirements

- **User Registration:** Users can create accounts with personal information for access to visa slot booking.

- **Login and Authentication:** Secure login mechanisms with password protection and multi-factor authentication.
- **Real-Time Slot Availability:** Constantly updated slot availability information from consulates and embassies.
- **Booking Slots:** Users can select and reserve visa appointment slots based on preferences.
- **Automated Notifications:** Automated email and SMS notifications for appointment confirmations, reminders, and updates.
- **Document Upload:** Capability to upload, view, and manage visa application documents.
- **Payment Integration:** Integration with secure payment gateways for online payment of visa fees.
- **User Profile Management:** Users can update and maintain their profiles with ease.
- **Slot Cancellation and Rescheduling:** Users can cancel and reschedule appointments as needed.
- **Reporting and Analytics:** Creation of comprehensive reports and data analytics for performance evaluation.
- **Admin Dashboard:** An admin panel to manage users, appointments, and system settings.
- **Integrated Support Chat:** A live chat system for real-time user assistance and issue resolution.

- **Data Security Measures:** Implementation of robust data encryption and security features.
- **Compliance with Data Protection Regulations:** Ensuring adherence to data privacy laws and regulations.
- **Efficient Slot Allocation:** Allocation of slots without overbooking or underutilizing consulate resources.
- **User Feedback Gathering:** Collection of user feedback and reviews for continuous improvement.
- **Multi-Language Support:** Support for multiple languages to cater to a diverse user base.
- **Support Ticket System:** A ticketing system for users to log and track support requests.
- **Payment Status Tracking:** Users can track the status of their payment for visa application fees.
- **User Training Materials:** Availability of training materials and user guides for effective usage.
- **Customizable Data Fields:** The ability to customize and add data fields to capture specific information.
- **Audit Trail Logging:** A record of all actions and changes for transparency and accountability.
- **User Notifications:** Email or SMS notifications to keep users informed about visa application status.

3.PREPARATION DATA MODELING

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.

Object	Passport	Visa Slot	Payment
Fields	Full Name (Text)	Location (Text)	Payment Mode (Picklist)
Fields	Contact Number (Number)	Time (Data&Time)	CardNumber (Number)
Fields	PassportNumber (Text)	Visa Slot Number (Auto Number)	Transaction ID (Auto Number)
Fields	Permanent address (Text area)	Passport number (Master details)	Visa Slot Number (Master details)
Fields		Status(Picklist)	Cancel Transaction (Check Box)

1)Creation Of Custom Object Passport:

For this Book My Visa Slot we need to create 3 objects

Passport, Visa Slot and

Payment. The below steps will assist you in creating those objects.

1. Click on the gear icon and then select Setup
2. Click on the object manager tab just beside the home tab

After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object

3. On the Custom Object Definition page, create the object as follows:
4. Label: Passport
5. Plural Label: Passports
6. Record Name: Passport Number
7. Check the Allow Reports checkbox
8. Check the Allow Search checkbox
9. Click Save.

The screenshot shows the 'Edit Custom Object: Passport' page in Salesforce. The page is titled 'Custom Object Definition Edit' and includes buttons for 'Save', 'Save & New', and 'Cancel'. Below the title, there is a section for 'Custom Object Information' with a warning: 'The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.' The form contains the following fields:

- Label:** Passport (Example: Account)
- Plural Label:** Passports (Example: Accounts)
- Starts with vowel sound:** ☐
- The Object Name is used when referencing the object via the API:**
 - Object Name:** Passport (Example: Account)
 - Description:** (Empty text area)
- Context Sensitive Help Setting:** ☒ Open the standard Salesforce.com Help & Training window (vs. ☐ Open a window using a Visualforce page)
- Content Name:** Name (dropdown menu)

Below the form, there is a section titled 'Enter Record Name Label and Format' with a note: 'The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.' The form contains the following fields:

- Record Name:** Passport Number (Example: Account Name)

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: Example: Account Name

Data Type:

Optional Features

- ☒ Allow Reports
- ☐ Allow Activities
- ☐ Track Field History
- ☐ Allow in Chatter Groups
- ☐ Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

- ☒ Allow Sharing
- ☒ Allow Bulk API Access
- ☒ Allow Streaming API Access

Deployment Status [What is this?](#)

☐ In Development

☒ Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

- ☒ Allow Search

2)Creation Of Custom Object-Visa Slot:

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Drop down click on that and select Custom Object

On the Custom Object Definition page, create the object as follows:

4. Label: Visa Slot
5. Plural Label: Visa Slots
- 6.Record Name: Visa Slot Number(Auto Number)
- 7.Check the Allow Reports checkbox
- 8.Check the Allow Search checkbox,Click Save.

Quick Find / Search... Expand All | Collapse All

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- Translation Workbench

Edit Custom Object
Visa Slot

Custom Object Definition Edit [Save](#) [Save & New](#) [Cancel](#)

Custom Object Information * Required Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label Example: Account
Plural Label Example: Accounts
Starts with vowel sound ☐

The Object Name is used when referencing the object via the API
Object Name Example: Account
Description

Context Sensitive Help Setting
☒ Open the standard Salesforce.com Help & Training window
☐ Open a window using a Visualforce page
Context Name

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name Example: Account Name

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- Gmail Integration and Sync
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 - Lightning Bolt
 - Schema Builder

Data Type

Optional Features

- ☒ Allow Reports
- ☐ Allow Activities
- ☐ Track Field History
- ☐ Allow in Chatter Groups
- ☐ Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#)

- ☒ Allow Sharing
- ☒ Allow Bulk API Access
- ☒ Allow Streaming API Access

Deployment Status [What is this?](#)

- ☐ In Development
- ☒ Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#)

- ☒ Allow Search

[Save](#) [Save & New](#) [Cancel](#)

3)Create Of Custom Object- Payment:

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Drop down click on that and select Custom Object.
- 4.On the Custom Object Definition page, create the object as follows:
- 5.Label: Payment
- 6.Plural Label: Payments
- 7.Record Name: Transaction Id (Auto Number)

8. Check the Allow Reports check box

9. Check the Allow Search check box

10. Click Save.

The screenshot shows the 'Edit Custom Object' page for a custom object named 'Payment'. The page is titled 'Custom Object Definition Edit' and includes a 'Save' button, a 'Save & New' button, and a 'Cancel' button. The 'Custom Object Information' section contains the following fields: 'Label' (Payment), 'Plural Label' (Payments), 'Starts with vowel sound' (unchecked), 'Object Name' (Payment), and 'Description'. The 'Context-Sensitive Help Setting' section has two options: 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page'. The 'Enter Record Name Label and Format' section includes a 'Record Name' field (Transaction Id (Auto Number)) and a 'Date Type' dropdown (Text). The 'Optional Features' section has checkboxes for 'Allow Reports' (checked), 'Allow Activities' (unchecked), 'Track Field History' (unchecked), 'Allow in Chatter Groups' (unchecked), and 'Enable Licensing' (unchecked). The 'Object Classification' section has checkboxes for 'Allow Sharing' (checked), 'Allow Bulk API Access' (checked), and 'Allow Streaming API Access' (checked). The 'Deployment Status' section has radio buttons for 'In Development' (unchecked) and 'Deployed' (checked). The 'Search Status' section has a checkbox for 'Allow Search' (checked). The page also includes a 'Lightning Experience Transition Assistant' and a 'Salesforce Mobile Quick Start' section.

The screenshot shows the 'Edit Custom Object' page for a custom object named 'Payment'. The page is titled 'Custom Object Definition Edit' and includes a 'Save' button, a 'Save & New' button, and a 'Cancel' button. The 'Custom Object Information' section contains the following fields: 'Label' (Payment), 'Plural Label' (Payments), 'Starts with vowel sound' (unchecked), 'Object Name' (Payment), and 'Description'. The 'Context-Sensitive Help Setting' section has two options: 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page'. The 'Enter Record Name Label and Format' section includes a 'Record Name' field (Transaction Id (Auto Number)) and a 'Date Type' dropdown (Text). The 'Optional Features' section has checkboxes for 'Allow Reports' (checked), 'Allow Activities' (unchecked), 'Track Field History' (unchecked), 'Allow in Chatter Groups' (unchecked), and 'Enable Licensing' (unchecked). The 'Object Classification' section has checkboxes for 'Allow Sharing' (checked), 'Allow Bulk API Access' (checked), and 'Allow Streaming API Access' (checked). The 'Deployment Status' section has radio buttons for 'In Development' (unchecked) and 'Deployed' (checked). The 'Search Status' section has a checkbox for 'Allow Search' (checked). The page also includes a 'Lightning Experience Transition Assistant' and a 'Salesforce Mobile Quick Start' section.

Tabs:

Tab: A tab is like a user interface that used to build records for objects and to view the records in the objects. Tabs basically categorize into 4 different sections¹.

1. Standard Object Tabs

2. Custom Object Tabs

3. Web Tabs

4. Visualforce Tabs

1) Creation of Custom Tab- Passport Object:

Navigate to setup and home

1. Enter Tabs in Quick Find Box and select Tabs
2. Under Custom Object Tabs, click New
3. For Object, select Passport
4. For Tab Style, select any icon
5. Leave all defaults as is. Click Next, Next, and Save

Quick Find / Search... Expand All Collapse All

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- Translation Workbench
- Work Management

Edit Custom Object Tab
Passports

Fill in the fields below to define the custom tab:

Custom Tab Definition Edit

Custom Object Tab Information

Tab Label: Passports
Object: Passport
Tab Style: Diamond

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link: --None--

Enter a short description.
Description:

Save Cancel

2) Creation Of Custom Tab- Visa Slot Object:

Navigate to setup and enter Tabs in Quick Find and select Tabs. Under Custom Object Tabs, click New.

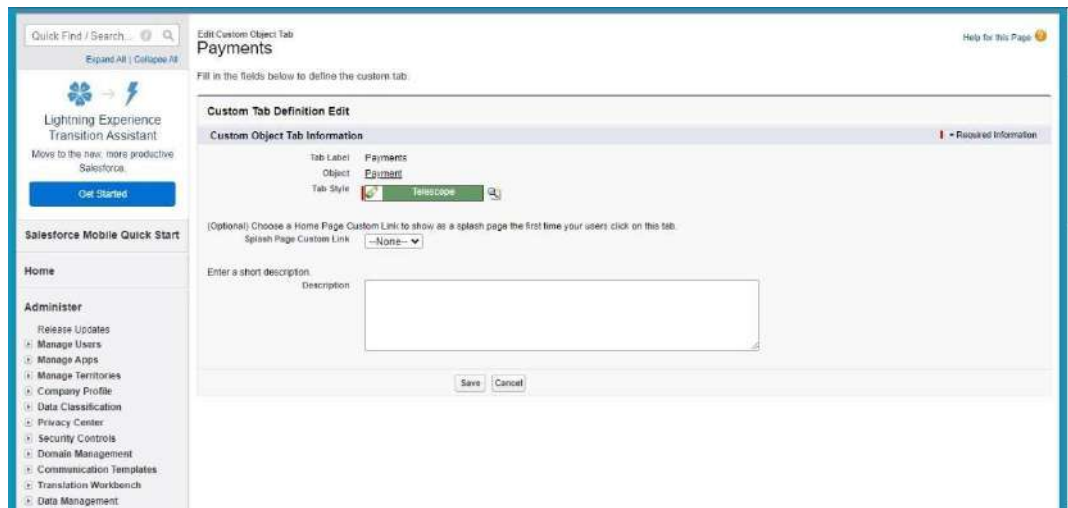
1. For Object, select Visa Slot.
2. For Tab Style, select any icon.
3. Leave all defaults as is. Click Next, Next, and Save.

The screenshot shows the 'Edit Custom Object Tab' page for 'Visa Slots' in the Salesforce Lightning Experience. The page has a blue header with the text 'Move to Lightning Experience and give your users a productivity boost.' and buttons for 'Tell Me More' and 'Check Readiness'. On the left, there is a sidebar with a search bar, 'Lightning Experience Transition Assistant', 'Salesforce Mobile Quick Start', and an 'Administer' section with links like 'Manage Users', 'Manage Apps', etc. The main content area is titled 'Edit Custom Object Tab: Visa Slots' and includes a 'Quick Find / Search' bar. Below the title, it says 'Fill in the fields below to define the custom tab.' The 'Custom Tab Definition Edit' section contains a 'Custom Object Tab Information' table with fields for 'Tab Label' (Visa Slots), 'Object' (Visa Slot), and 'Tab Style' (Map). Below this, there is an optional section for 'Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.' with a 'Splash Page Custom Link' dropdown set to '--None--'. At the bottom, there is a 'Description' text area and 'Save' and 'Cancel' buttons.

3)Creation Of Custom Tab- Payment Object

Navigate to setup and enter Tabs in Quick Find and select Tabs Under Custom Object Tabs, click New

1. For Object, select Payment
2. For Tab Style, select any icon
3. Leave all defaults as is. Click Next, Next, and Save



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. Primarily there are two types 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.

To Create a Master-Detail relationship between Passport and Visa Slot Objects.

1) Relationship Creation:

Fields Creation: Passport Number

Navigate to setup

1. Click on Object Manager and search and select Visa Slot object
2. Select Fields & Relations and click New.
3. Select Data Type: Master-Detail, next.

4. Related to: Passport, next.
5. Label: Passport Number
6. Child Relationship Name: Visa Slot, next.
7. Next, next and save.

Quick Find / Search... Expand All Collapse All

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- Data Management
- Mobile Administration

Custom Field Definition Edit

Change Field Type Save Cancel

Field Information

Field Label: Passport Number Data Type: Master-Detail

Field Name: Passport Number

Description:

Help Text:

Data Owner: User

Field Usage: --None--

Data Sensitivity Level: --None--

Compliance Categorization

Available: PII, HIPAA, GDPR, PCI

Chosen:

Master-Detail Options

Related To: Passport Child Relationship Name: Visa Slots

Related List Label: Visa Slots

Sharing Setting: Read Only

Select the minimum access level required on the Master record to create, edit, or delete related Detail records:

☐ Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.

☒ Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Allow reparenting: ☐ Child records can be reparented to other parent records after they are created.

Lookup Filter

Optionally, create a filter to limit the records available to users in the lookup field. [To learn more!](#)

[Show Filter Settings](#)

Change Field Type Save Cancel

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- Google Apps
- Analytics
- Tableaux
- Data.com Administration

Build

- Customize
- Create
 - Apps
 - Custom Labels
 - Interaction Log Layouts

Custom Field Definition Edit

Change Field Type Save Cancel

Field Information

Field Label: Passport Number Data Type: Master-Detail

Field Name: Passport Number

Description:

Help Text:

Data Owner: User

Field Usage: --None--

Data Sensitivity Level: --None--

Compliance Categorization

Available: PII, HIPAA, GDPR, PCI

Chosen:

Master-Detail Options

Related To: Passport Child Relationship Name: Visa Slots

Related List Label: Visa Slots

Sharing Setting: Read Only

Select the minimum access level required on the Master record to create, edit, or delete related Detail records:

☐ Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.

☒ Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Allow reparenting: ☐ Child records can be reparented to other parent records after they are created.

Lookup Filter

Optionally, create a filter to limit the records available to users in the lookup field. [To learn more!](#)

[Show Filter Settings](#)

Change Field Type Save Cancel

Field Creation:

This milestone explains about Field Creation.

1)Fields Available On Custom Object: Passport:

Field Name Data Type

Full Name Text

Contact Number Number

Passport Number Text

Permanent Address Text

2) Field Creation: Full Name

Field Creation: Full Name:Navigate to Setup

2. Click the Object Manager next to Home Tab
3. Type Passport in Quick Find and Select it
4. Click on Fields and Relationships
5. Click New
6. Select Data Type: Text, click on next
7. Field Label: Full Name
8. Length: Max 80
9. Check always requires a value to save this record
10. Click next
11. Next, Save or Save & New (if further new field will be create)

The image displays two screenshots of the Salesforce Custom Field Definition Edit page. The top screenshot shows the 'Field Information' section with the following details:

- Field Label: Full Name
- Field Name: Full_Name
- Data Type: Text
- Help Text: (empty)
- Data Owner: User
- Field Usage: --None--
- Data Sensitivity Level: --None--
- Compliance Categorization: Available (PII, HIPAA, GDPR, PCI) and Chosen (empty)

The bottom screenshot shows the 'General Options' section with the following details:

- Required: ☒ Always require a value in this field in order to save a record
- Unique: ☐ Do not allow duplicate values
 - ☐ Treat "ABC" and "abc" as duplicate values (case insensitive)
 - ☐ Treat "ABC" and "abc" as different values (case sensitive)
- External ID: ☐ Set this field as the unique record identifier from an external system
- Default Value: Show Formula Editor

The 'Text Options' section shows a Length of 70.

3)Field Creation: Contact Number:

- 1.Navigate to Setup
2. Click the Object Manager next to Home Tab
3. Type Passport in Quick Find and Select it
4. Click on Fields and Relationships
5. Click New
6. Select Data Type: Number, click on next
7. Field Label: Contact Number
8. Length:
9. Next, Save

10 and Decimal 0, click on
next

The image shows two screenshots of the Salesforce Custom Field Definition Edit page. The top screenshot shows the 'Field Information' section with the field name 'Contact Number' and data type 'Number'. The bottom screenshot shows the 'Number Options' section with a length of 18 and decimal places of 0. Both screenshots show the 'General Options' section with various checkboxes for field behavior.

Field Information

Field Label: Contact Number
Field Name: Contact_Number
Description:
Help Text:
Data Owner: User
Field Usage: --None--
Data Sensitivity Level: --None--
Compliance Categorization: Available: PII, HIPAA, GDPR, PCI; Chosen:

General Options



Required: ☐ Always require a value in this field in order to save a record
Unique: ☐ Do not allow duplicate values
External ID: ☐ Set this field as the unique record identifier from an external system
AI Prediction: ☐ Use this field to store AI prediction scores
Default Value: [Show Formula Editor](#)

Number Options

Length: 18
Decimal Places: 0

4)Field Creation: Permanent Address

- 1.Navigate to Setup
2. Click the Object Manager next to Home Tab
3. Type Passport in Quick Find and Select it
4. Click on Fields and Relationships
5. Click New
6. Select Data Type: Text Area, click on next
7. Field Label: Permanent Address
8. Next, next and save

Quick Find / Search...  

Expanded All | Collapse All

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Edit Passport Custom Field
Permanent Address [Help for this Page](#)

Custom Field Definition Edit [Change Field Type](#) [Save](#) [Cancel](#)

Field Information Data Type: Text Area ! Required Information

Field Label:

Field Name:

Description:

Help Text:

Data Owner:

Field Usage:

Date Sensitivity Level:

Compliance Categorization:

Available: PII, HIPAA, GDPR, PCI. Chosen:

General Options

Required: ☐ Always require a value in this field in order to save a record

Default Value: [Show Formula Editor](#)

Use formula syntax: Enclose text and picklist value API names in double quotes: "{the_text}". Include numbers without quotes: 123. Enter percentages as decimals: 0.10, and express date calculations in the standard format: {Today} + 7. To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__c.RecordName.Field__c.

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- Data.com Administration

Description

Help Text

Data Owner

Field Usage

Date Sensitivity Level

Compliance Categorization

Available: PII, HIPAA, GDPR, PCI. Chosen:

General Options

Required: ☐ Always require a value in this field in order to save a record

Default Value: [Show Formula Editor](#)

Use formula syntax: Enclose text and picklist value API names in double quotes: "{the_text}". Include numbers without quotes: 123. Enter percentages as decimals: 0.10, and express date calculations in the standard format: {Today} + 7. To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__c.RecordName.Field__c.

[Change Field Type](#) [Save](#) [Cancel](#)

5)Fields Available On Custom Object: Visa Slot Field Name Data Type



Location Text

Time Date & Time


Visa Slot Number Auto Number (Use in Record Name)

Passport Number Master-Detail

Status Picklist

Quick Find / Search...  

Expand All | Collapse All

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Edit Via: Slot Custom Field

Status

Help for this Page 

Custom Field Definition Edit [Change Field Type](#) [Promote to Global Value Set](#) [Save](#) [Cancel](#)

Field Information ! Required Information

Field Label: Data Type: Picklist

Field Name:

Description:

Help Text:

Data Owner:

Field Usage:

Data Sensitivity Level:

Compliance Categorization

Available: PII, HIPAA, GDPR, PCI

Chosen:

General Options

Required: ☐ Always require a value in this field in order to save a record

Default Value: [Show Formula Editor](#)

Use formula syntax: Enclose text and picklist value API names in double quotes ("The_text"). Include numbers without quotes (123), show percentages as decimals (0.10), and express date calculations in the standard format (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__c.\$RecordAPIName.Field__c.

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- Email Administration
- Google Apps
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Build

- Customize
- Create
 - Apps
 - Custom Labels
 - Interaction Log Layouts
- Objects

Compliance Categorization

Available: PII, HIPAA, GDPR, PCI

Chosen:

General Options

Required: ☐ Always require a value in this field in order to save a record

Default Value: [Show Formula Editor](#)

Use formula syntax: Enclose text and picklist value API names in double quotes ("The_text"). Include numbers without quotes (123), show percentages as decimals (0.10), and express date calculations in the standard format (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__c.\$RecordAPIName.Field__c.

Picklist Options

☒ Restrict picklist to the values defined in the value set [1](#)

[Change Field Type](#) [Promote to Global Value Set](#) [Save](#) [Cancel](#)

6)Fields Available On Custom Object: Payment

Field Name Data Type

Payment Mode Picklist (Values- Debit Card, Credit Card) Card

Number Number

Transaction Id Auto Number (Used in Record Name) Visa

Slot Number Master-Detail

Cancel Transaction Text

Apps:

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 Apps
- 2) Custom Apps

1)Creation Of App:

Click on setup and go to home page.

1. In Quick Find Box search and select App Manager.
2. Click: New Lightning App.
3. App Name: Book My Visa and click on next.
4. Navigate System: Standard Navigation Support

Form Factor: Desktop and Phone Click next, next

5. Move Objects from available items to selected items. (Passport, Visa Slot, Payment).
6. Add System Administrator profile, available profile to selected profile.

Save & Finish

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

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

Lightning App Builder

App Settings

Pages

Book My Visa

Help

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

App Options

Navigation and Form Factor ⓘ

Setup and Personalization ⓘ

* Navigation Style
☒ Standard navigation
☐ Console navigation

* Supported Form Factors
☒ Desktop and phone
☐ Desktop
☐ Phone

Setup Experience
☒ Setup (full set of Setup options)
☐ Service Setup

App Personalization Settings
☐ Disable end user personalization of nav items in this app
☐ Disable temporary tabs for items outside of this app

Lightning App Builder

App Settings

Pages

Book My Visa

Help

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

Create

Type to filter list...

Accounts

Alert Settings

All Sites

Alternative Payment Methods

Analytics

App Launcher

Appointment Categories

Appointment Invitations

Selected Items

Passports

Visa Slots

Payments

User:

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

NOTE- As Salesforce license can only be used by 2 Users at a time in Dev Org, so If you don't find Salesforce license then deactivate a user who has Salesforce license or change the license type from Salesforce to any other

1)Creation Of User:

Navigate to setup

1. In Quick Find box select and search: User
2. Click: New user
3. Give First and Last Name
4. Enter your email in the email field
5. Enter user name, it must be unique
6. User license: salesforce platform
7. In the profile field: Standard user profile
8. Check, Generate new password and notify user immediately
9. Save

Quick Find / Search Help for this Page

Expand All | Collapse All

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 - Permission Sets
 - Permission Set Groups
 - User Management Settings
 - Profiles
 - Public Groups
 - Queues
 - Login History

User Edit Save Save & New Cancel

User A

General Information Required Information

First Name <input type="text" value="User"/>	Role <input type="text" value="CEO"/>
Last Name <input type="text" value="A"/>	User License <input type="text" value="Salesforce Integration"/>
Alias <input type="text" value="uat"/>	Profile <input type="text" value="Salesforce API Only System Integrations"/>
Email <input type="text" value="usera@gmail.com"/>	Active <input checked="" type="checkbox"/>
Username <input type="text" value="i@gmail.com"/>	Marketing User <input type="checkbox"/>
Nickname <input type="text" value="User1696243377396991145"/>	Offline User <input type="checkbox"/>
Title <input type="text" value="Records"/>	Knowledge User <input type="checkbox"/>
Company <input type="text" value="ZORA"/>	Flow User <input type="checkbox"/>
Department <input type="text" value="Computer science"/>	Service Cloud User <input type="checkbox"/>
Division <input type="text" value="A"/>	Site.com Contributor User <input type="checkbox"/>
	Site.com Publisher User <input type="checkbox"/>
	WDC User <input type="checkbox"/>
	Data.com User Type <input type="text" value="--None--"/>
	Data.com Monthly Addition Limit <input type="text" value="300"/>
	Accessibility Mode (Classic Only) <input type="checkbox"/>
	High-Contrast Palette on Charts <input type="checkbox"/>
	Load Lightning Pages While Scrolling <input checked="" type="checkbox"/>
	Debug Mode <input type="checkbox"/>
	Salesforce CRM Content User <input checked="" type="checkbox"/>

Develop

- Lightning Bolt**
 - Schema Builder
 - Lightning App Builder
 - Canvas App Previewer
 - Installed Packages
 - Package Usage
 - AppExchange Marketplace

Deploy

- Deployment Settings
- Deployment Status

Monitor

- System Overview
- Optimizer
- Imports
- Outbound Messages
- Time-Based Workflow
- Automated Process Actions
- Case Escalations
- Entitlement Processes
- API Usage Notifications
- Mass Emails
- Email Snapshots
- Jobs**
- Logs**

Single Sign On Information

Federation ID

Locale Settings

Time Zone

Locale

Language

Approver Settings

Delegated Approver

Manager

Receive Approval Request Emails

☒ Generate new password and notify user immediately

Save Save & New Cancel

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OWD: Organization Wide Defaults Settings:

OWD settings determine the baseline level of access for all records of an object. This can be used to give permission to the organization wide and it can be used for restrict the access; we can control the record level access.

OWD can never grant users more access than they have through their object permission.

Primarily four types of access can be set in Salesforce OWD- 1. Public read/write/transfer (Only available for Leads and Cases)

2. Public read/write

3. Public read only

4. Private

Steps of OWD settings:

Navigate setup in Quick Find search bar

1. Type Sharing Setting and Select it.

2. Edit: Organization Wide Defaults.

3. Scroll down list and select Passport...

The screenshot shows the Salesforce Organization-Wide Defaults (OWD) settings page for the 'Passport' object. The left sidebar contains a navigation menu with options like Case Escalations, Entitlement Processes, API Usage Notifications, Mass Emails, Email Snapshots, Jobs, and Logs. The main content area displays a list of objects with their corresponding OWD settings. The 'Passport' object is highlighted, showing its OWD settings as 'Public Read/Write'. Below the list, there are 'Other Settings' including 'Standard Report Visibility' (checked), 'Manual User Record Sharing' (unchecked), 'Manager Groups' (unchecked), and 'Secure guest user Require permission to view record access' (unchecked). The bottom of the page has 'Save' and 'Cancel' buttons.

Object	OWD	Transfer
Service Contract	Private	<input type="checkbox"/>
Service Resource	Public Read/Write	<input type="checkbox"/>
Service Territory	Public Read/Write	<input type="checkbox"/>
Shift	Private	<input type="checkbox"/>
Streaming Channel	Public Read/Write	<input type="checkbox"/>
Waitlist	Private	<input type="checkbox"/>
Web Card Document	Private	<input type="checkbox"/>
Work Order	Private	<input type="checkbox"/>
Work Plan	Private	<input type="checkbox"/>
Work Plan Template	Private	<input type="checkbox"/>
Work Step Template	Private	<input type="checkbox"/>
Work Type	Private	<input type="checkbox"/>
Work Type Group	Public Read/Write	<input type="checkbox"/>
Book	Public Read/Write	<input checked="" type="checkbox"/>
Child object	Public Read/Write	<input checked="" type="checkbox"/>
college	Public Read/Write	<input checked="" type="checkbox"/>
Passport	Public Read/Write	<input checked="" type="checkbox"/>
Payment	Private	<input checked="" type="checkbox"/>
Research Proposal	Public Read/Write	<input checked="" type="checkbox"/>
Student	Public Read/Write	<input checked="" type="checkbox"/>

Other Settings

Standard Report Visibility ☒ Manual User Record Sharing ☐ Manager Groups ☐ Secure guest user Require permission to view record access ☐

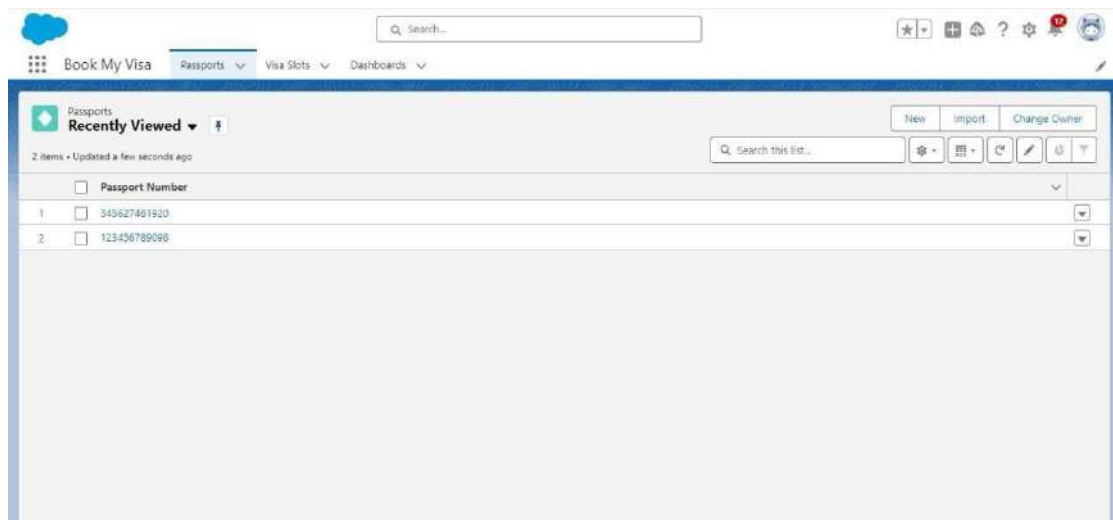
Save Cancel

User Adoption:

This milestone explains about user adoption 1)**Create Record (Passport):**

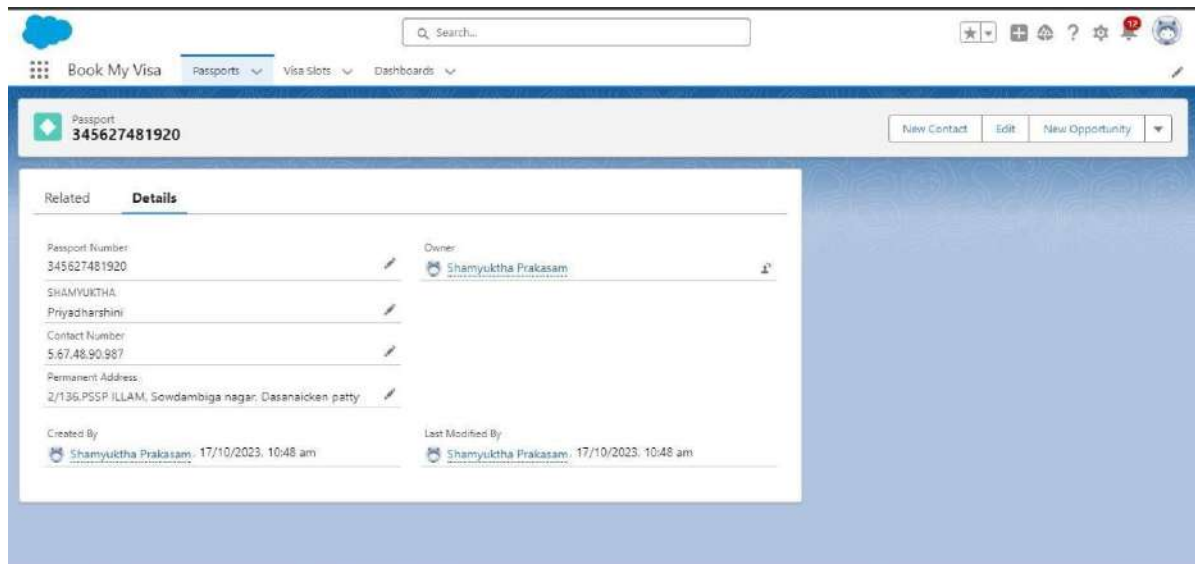
1.Click on App Launcher on left side of screen.

2. Search Book My Visa App & click on it.
3. Click on Passport tab.
4. Click new button
5. Fill all Passport record details.
6. Click on Save Button.



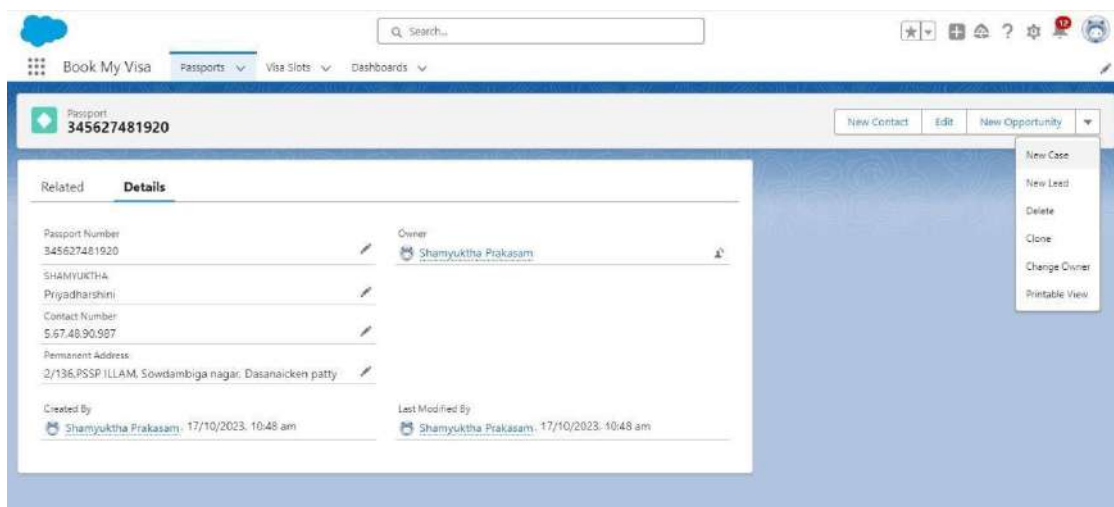
2)View Records (Passport):

- 1.Click on App Launcher on left side of screen.
2. Search Book My Visa & click on it.
3. Click on Passport Tab.
4. Click on any record name. you can see the details of the Driver



3)Delete Records (Passport):

1. Click on App Launcher on left side of screen.
2. Search Book My Visa & click on it.
3. Click on Passport Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again



What Are Reports?

Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.

There are 4 types of report formats in Salesforce: 1.

Tabular Reports:

This is the most basic report format. It just displays the row of records in a table with a grand total. While easy to set up they can't be used to create groups of data or charts and also cannot be used in Dashboards. They are mainly used to generate a simple list or a list with a grand total.

2. Summary Reports:

It is the most commonly used type of report. It allows grouping of rows of data, view subtotal, and create charts.

3. Matrix Report:

It is the most complex report format. Matrix report summarizes information in a grid format. It allows records to be grouped by both columns and rows. It can also be used to generate dashboards. Charts can be added to this type of report.

4. Joined Reports:

These types of reports let us create different views of data from multiple report types. The data is joined reports are organized in blocks. Each block acts as a sub report with its own fields, columns, sorting, and filtering. They are used to group and show data from multiple report types in different views.

Report Type:

Report type determines which set of records will be available in a report. Every report is based on a particular report type. The report type is selected first when we create a report. Every report type has a

primary object and one or more related objects. All these objects must be linked together either directly or indirectly.

1. A report type cannot include more than 4 objects.
2. Once a report is created its report type cannot be changed.

There are 2 types of report types:

1. Standard Report Types:

Standard Report Types are automatically included with standard objects and also with custom objects where “Allow Reports” is checked.

Standard report types cannot be customized and automatically include standard and custom fields for each object within the report type. Standard report types get created when an object is created, also when a relationship is created.

Note: Standard report types always have inner joins.

2. Custom Report Types:

Custom report types are reporting templates created to streamline the reporting process. Custom Reports are created by an administrator or User with “Manage

Custom:

Report Types” permission. Custom report types are created when standard report types cannot specify which records will be available on reports.

In custom report types we can specify objects which will be available in a particular report. The primary object must have a relationship with other objects present in a report type either directly or indirectly.

There are 3 types of access levels of folders:

1. Viewer:

With this access level, users can see the data in a report but cannot make any changes except cloning it into a new report.

2. Editor:

With this access level, users can view and modify the reports it contains and can also move them to/from any other folders they have access level as Editor or Manager.

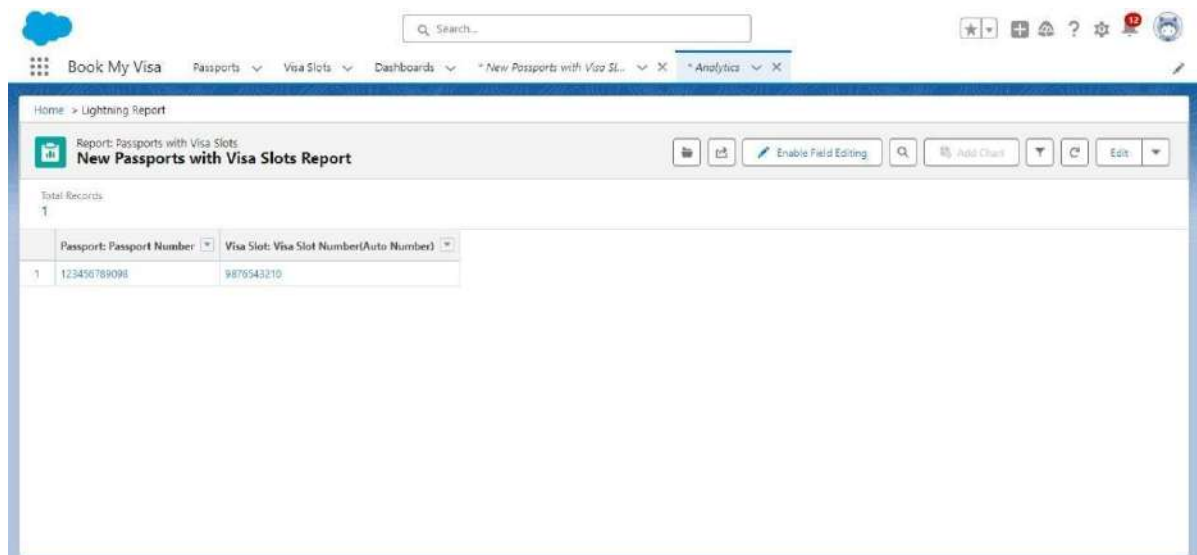
3. Manager:

With this access level, users can do everything Viewers & Editors can do, plus they can also control other user's access levels to this folder. Also, users with Manager Access levels can delete the report.

1)Creation of report:

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

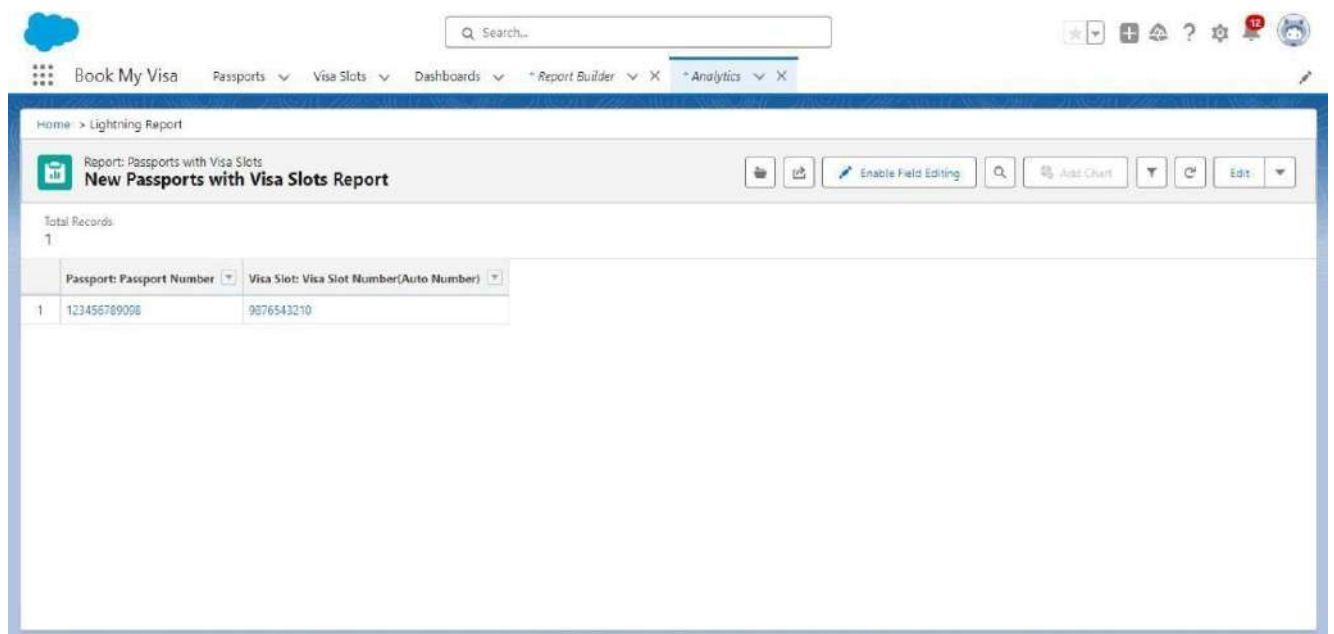
1. Click on App Launcher left side on the screen, Search and select: Report
2. Click Report- select New Report
3. Select Report Type: Passport with Visa Slot Number
4. Click on Start Report button
5. Below the Outline pane- In the Group Row select: Location
6. In Group Column select- Passport: Passport Number
7. In Column select: Visa Slot Number
8. Now navigate to Filter pane available next to Outline pane And ensure in the show me section: All Passport is selected
9. In Passport Created date: All Time.
10. Give the Label: Passport with Visa Location
11. Save & Run for saving the Report, Save.



View Report:

1)View Report:

1. Click on App Launcher on left side of screen.
2. Search Book My Visa App & click on it.
3. Click on Reports Tab.
4. Click on Passport with Visa Location and see reports



Dashboards:

Dashboards in Salesforce are a graphical representation of Reports. It shows data from source reports as visual components. These components provide snapshots of key metrics and performance indicators of the organization at a glance. Reports can be displayed in the dashboard like: Horizontal Bar chart, Vertical Bar Chart, Line Chart, Donut Chart, Metric Chart, Stacked Vertical Bar Chart, Stacked Horizontal Bar Chart, etc.

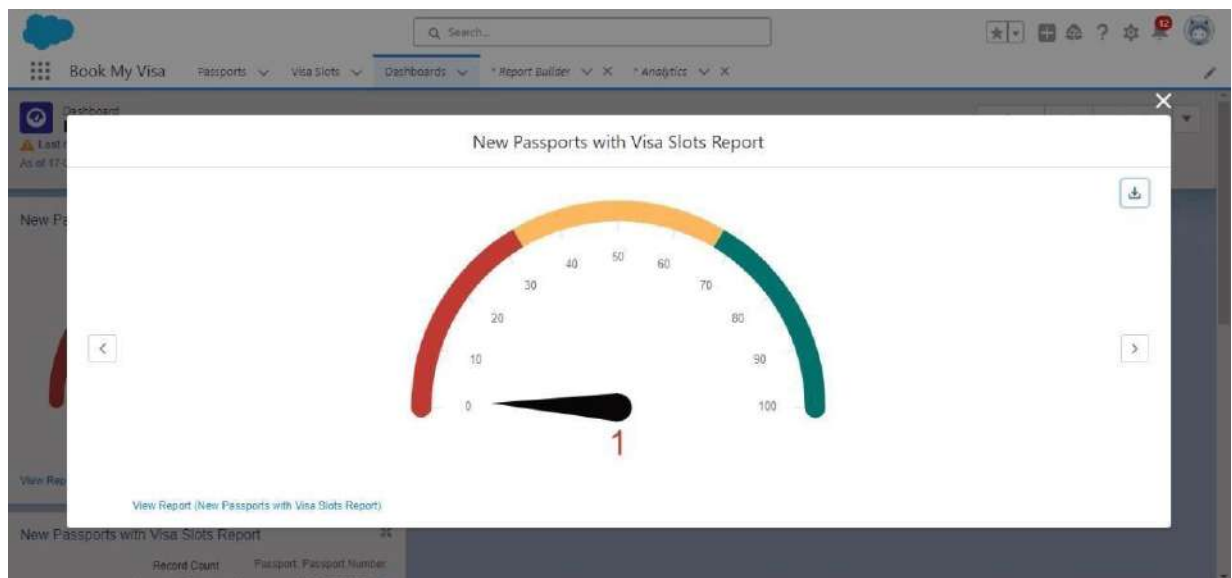
1)Creation Of Dashboard

1. Click on the App launcher left on screen and search for dashboards.
2. Select New Dashboard
3. Name the Dashboard: Passport With Visa Location
4. Select Create option
5. Click on Add Component
6. Select Passport with Visa Locations
7. Click Select
8. Select the Donut Chart to display a section
9. Value: Record count
10. Sliced By: Location

11. Leave the default values

12. Click on Add

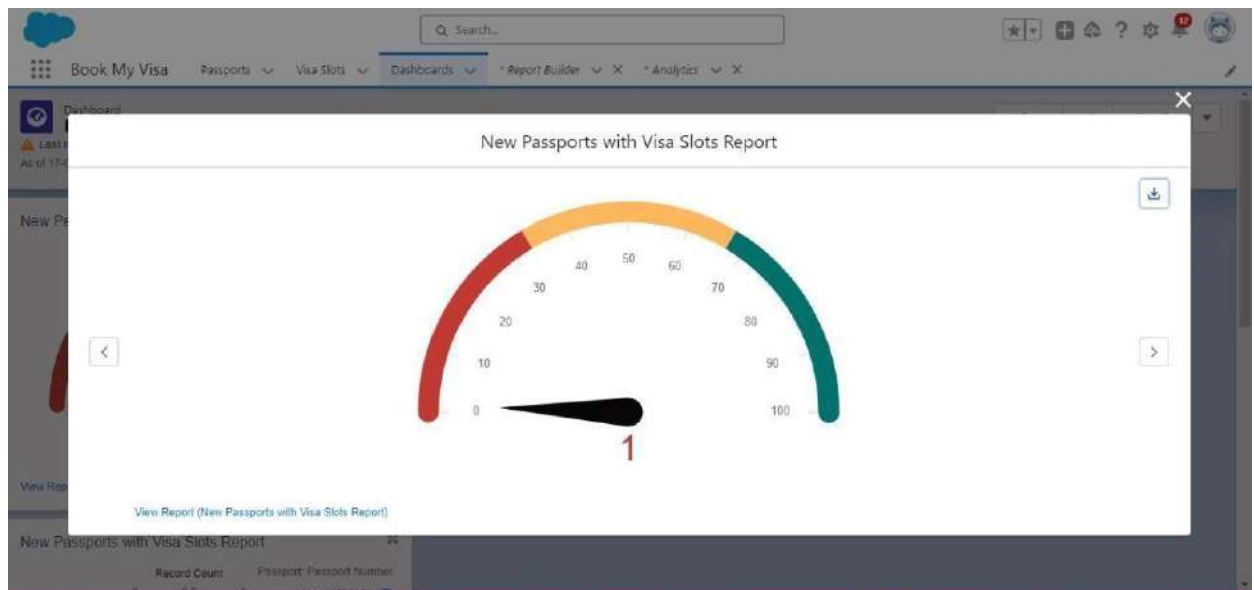
13. Save the Dashboard and Done



2)View Dashboard:

1. Click on App Launcher on left side of screen.
2. Search Book My Visa & click on it.
3. Click on Dashboard Tab.

4. Click on Passport with Visa Location see graph view of records



APEX:

Apex is a coding language of Salesforce. It can be invoked or started using triggers. A trigger is a set of Apex code that runs before or after data manipulation language (DML) events.

With Apex triggers, you can automate tasks that would otherwise be nearly impossible to accomplish using only the Salesforce user interface. Triggers enable you to create custom scripts that you can implement according to your needs, and the only limitation is your coding skills.

There are two Salesforce Apex trigger types:

Before triggers. These are helpful in cases that require a validation process before accepting a change. They run before any database changes.

After triggers. These are helpful in cases where you need to modify your database records and when the necessary value is stored in other records. They run after any database changes.

1)APEX:

1. Click on Set up Gear at drop down list you can find developer console click on that.
2. At the left side top you can find the option new click on that and then apex trigger.
3. Give the name as Deletionofvisarecord
4. And S object has Visa Object
5. Scenario - You cannot delete active visa record

trigger Deletionifvisarecord on Visa_Slot__c (before delete) {

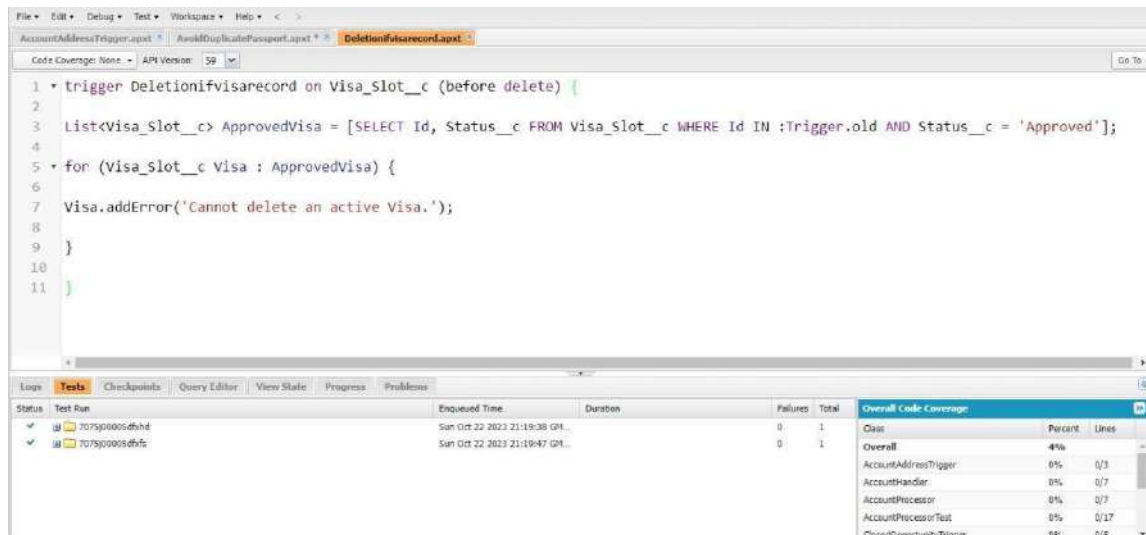
```
List<Visa_Slot_c> ApprovedVisa = [SELECT Id, Statusc FROM  
Visa_Slotc WHERE Id IN :Trigger.old AND Status_c = 'Approved'];
```

```
for (Visa_Slot__c Visa : ApprovedVisa) {
```

```
Visa.addError('Cannot delete an active Visa.');
```

```
}
```

```
}
```



2)APEX :

- 1) Click on Set up Gear at drop down list you can find developer console click on that.
- 2) At the left side top you can find the option new click on that and then apex trigger.
- 3) Give the name as AvoidDuplicatePassport
- 4) And S object has Passport Object
- 5) Scenario - trigger on the Passport_c object to avoid duplicate records based on the Full Name and Contact Number fields. trigger AvoidDuplicatePassports on Passport_c (before insert, before update) {

```
Set<String> uniqueKeys = new Set<String>();
```

```
List<Passport_c> duplicatePassports = new List<Passport_c>(); for
(Passport__c passport : Trigger.new) {
```

```
String    key =    passport.Full_Name_c    +    "    +
passport.Contact_Number__c;
```

```
if (uniqueKeys.contains(key)) { duplicatePassports.add(passport);
```



```

    } else { uniqueKeys.add(key);
    }
    } for (Passport__c passport : duplicatePassports)
    {

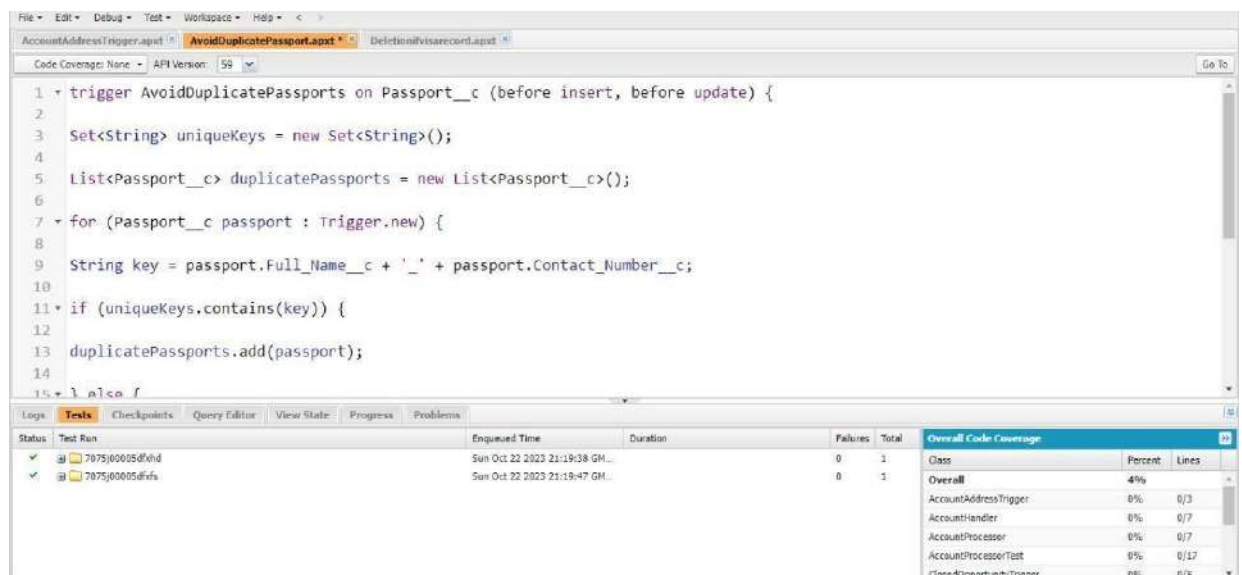
passport.addError('Duplicate record found based on Full Name and
Contact Number.');
```

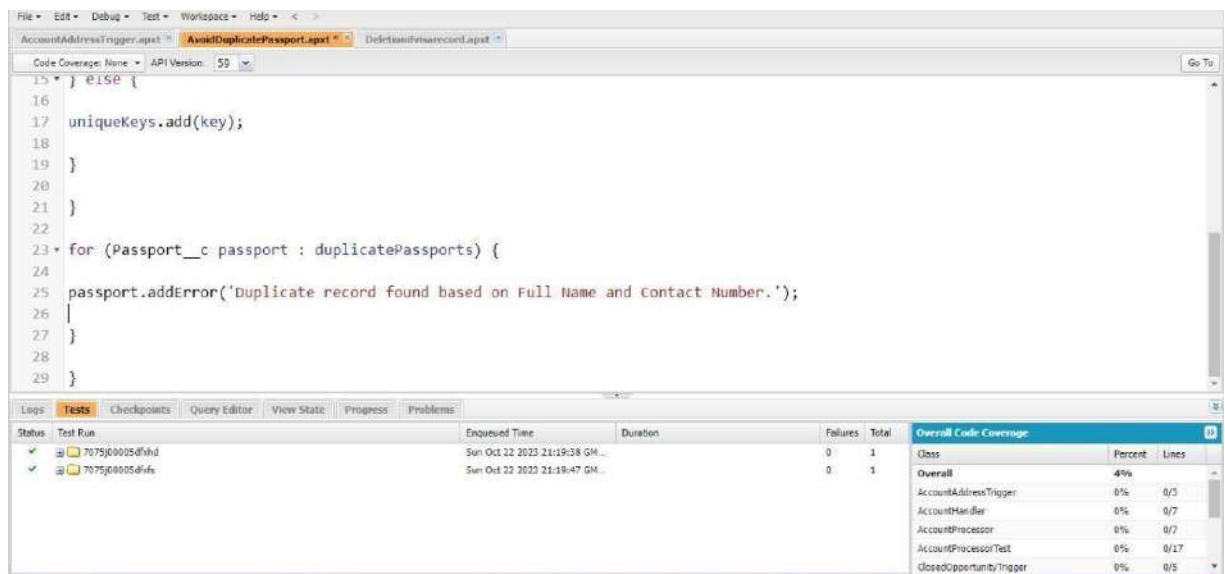
```

    }

}

```





GitHub&project Video doma Link

1.GitHub Link : <https://github.com/Kavi611420/Naan-Mudhalvan-SFD--NM2023TMID01223-MECW>

2.demo link: <https://youtu.be/x1PR8LfdVKs?si=FJMCVotKw-j2JGKO>