

NAAN MUDHALVAN

SALESFORCE DEVELOPER PROJECT REPORT

PROJECT TITLE : CRM APPLICATION TO BOOK A VISA SLOT

COLLEGE : PONJESLY COLLEGE OF ENGINEERING

DONE BY :

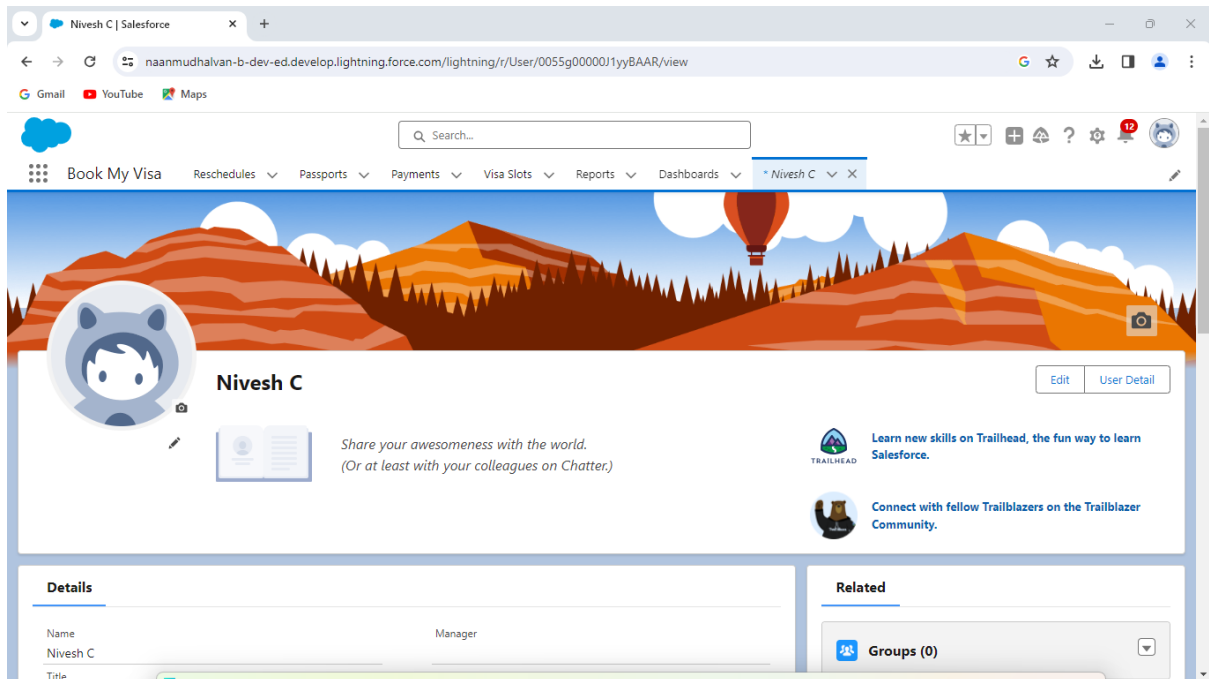
SIBIN RAJ M

REG NO : 961820114325

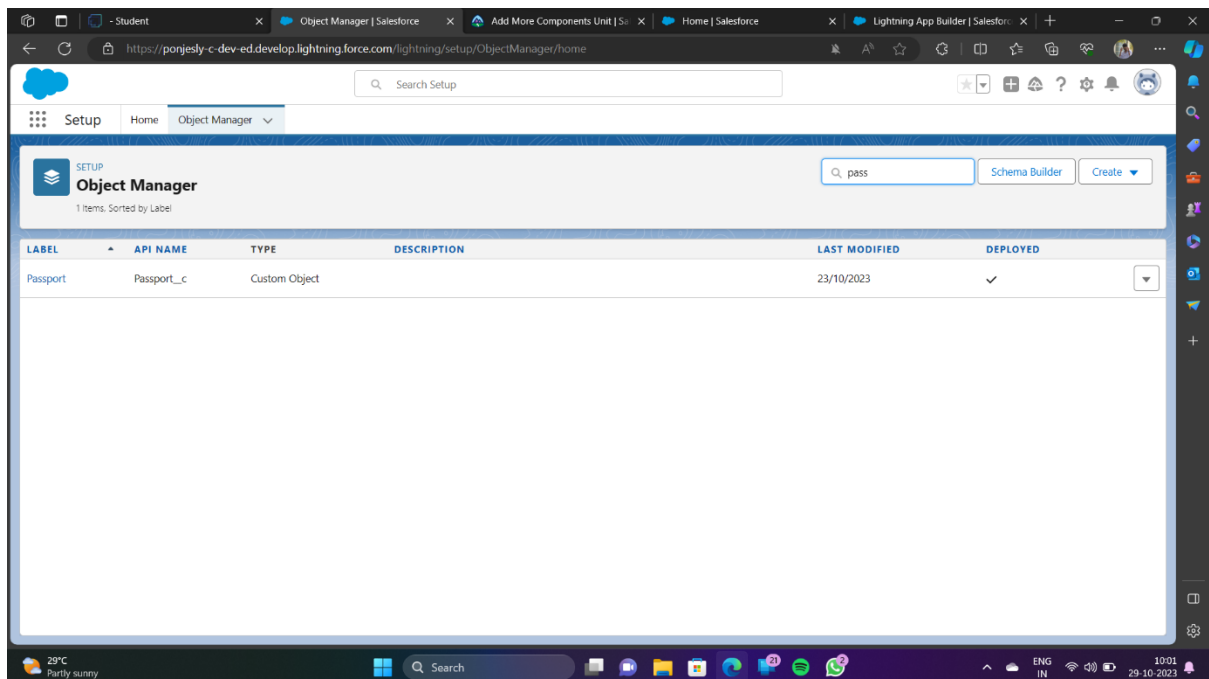
NM ID :

353F1B28AC1D14E8F694DBA0BF03EE68

Step 1: Create a Salesforce Account



Step 2: Create the Objects (Passport, Visa Slot, Payment)



Object Manager | Salesforce

Search Setup

Setup Home Object Manager

Object Manager

1 Items. Sorted by Label

Q visa Schema Builder Create

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Visa slot	Visa_slot_c	Custom Object		23/10/2023	✓

29°C Partly sunny

Object Manager | Salesforce

Search Setup

Setup Home Object Manager

Object Manager

10 Items. Sorted by Label

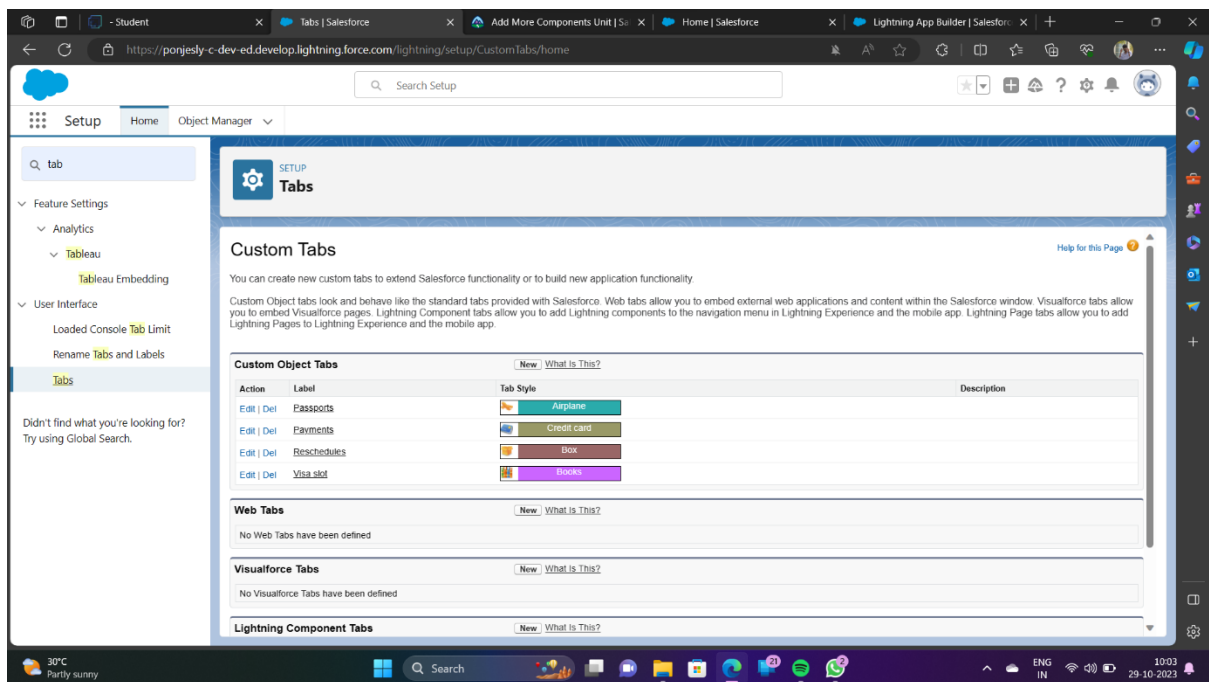
Q Payment Schema Builder Create

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
Card Payment Method	CardPaymentMethod	Standard Object			
Payment	Payment_c	Custom Object		23/10/2023	✓
Payment	Payment	Standard Object			
Payment Authorization	PaymentAuthorization	Standard Object			
Payment Authorization Adjustment	PaymentAuthAdjustment	Standard Object			
Payment Gateway	PaymentGateway	Standard Object			
Payment Group	PaymentGroup	Standard Object			
Payment Line Invoice	PaymentLineInvoice	Standard Object			
Refund Line Payment	RefundLinePayment	Standard Object			

https://ponjesly-c-dev-ed.develop.lightning.force.com/one.app#/setup/ObjectManager/0115j000032Cc7n/view

30°C Partly sunny

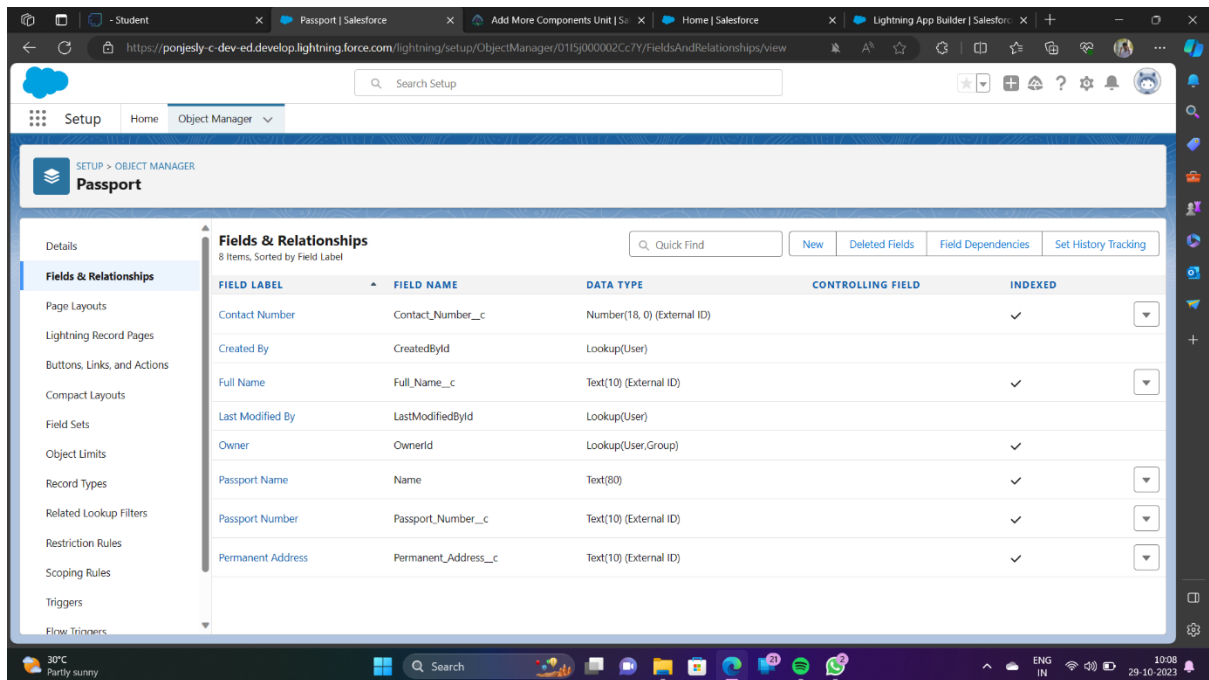
Step 3: Create the Tabs for each Objects (Passport, Visa Slot, Payment)



The screenshot shows the Salesforce Setup interface for Custom Tabs. The left sidebar contains a search bar with 'tab' entered and a list of categories: Feature Settings, Analytics, Tableau, Tableau Embedding, User Interface, Loaded Console Tab Limit, Rename Tabs and Labels, and Tabs (selected). The main content area is titled 'Custom Tabs' and includes a 'Help for this Page' link. Below the title, there is a description of custom tabs and a table for 'Custom Object Tabs'. The table has columns for Action, Label, Tab Style, and Description. It lists four tabs: Airplane, Credit card, Box, and Books. Below the table, there are sections for 'Web Tabs', 'Visualforce Tabs', and 'Lightning Component Tabs', each with a 'New' button and a 'What is This?' link.

Action	Label	Tab Style	Description
Edit Del	Passports	Airplane	
Edit Del	Payments	Credit card	
Edit Del	Reschedules	Box	
Edit Del	Visa slot	Books	

Step 4: Create the Fields & Relationship for each Objects (Passport, Visa Slot, Payment)



The screenshot shows the Salesforce Setup interface for the 'Passport' object. The left sidebar contains a search bar and a list of categories: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Restriction Rules, Scoping Rules, Triggers, and Flow Triggers. The main content area is titled 'Passport' and includes a 'Fields & Relationships' section. This section has a 'Quick Find' bar and buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. Below these, there is a table with columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table lists eight fields: Contact Number, Created By, Full Name, Last Modified By, Owner, Passport Name, Passport Number, and Permanent Address.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Contact Number	Contact_Number__c	Number(18, 0) (External ID)		✓
Created By	CreatedById	Lookup(User)		
Full Name	Full_Name__c	Text(10) (External ID)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Passport Name	Name	Text(80)		✓
Passport Number	Passport_Number__c	Text(10) (External ID)		✓
Permanent Address	Permanent_Address__c	Text(10) (External ID)		✓

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

Visa slot

Details

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
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Location	Location__c	Text(10) (External ID)		✓
Passport	Passport__c	Master-Detail(Passport)		✓
Passport Number (Master)	Passport_Number_Master__c	Number(18, 0) (External ID)		✓
Time	Time__c	Text(10) (External ID)		✓
Visa slot Name	Name	Text(80)		✓
Visa slot number	Visa_slot_number__c	Text(10) (External ID)		✓

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Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

Payment

Details

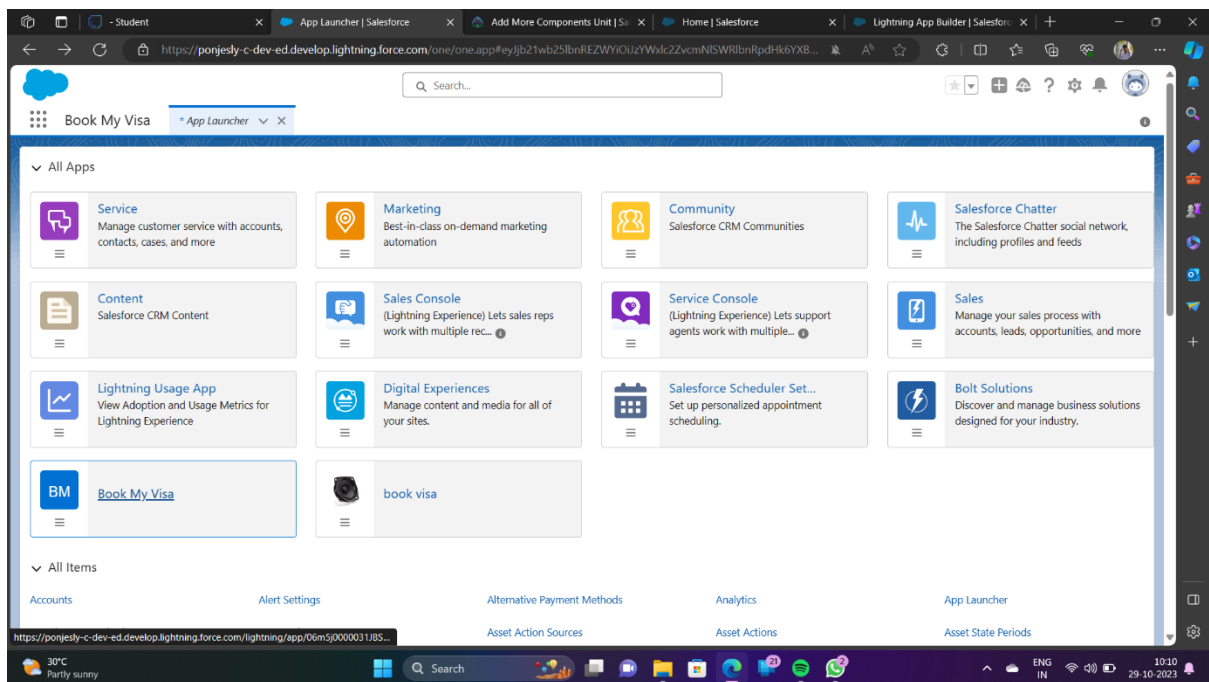
Fields & Relationships
9 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

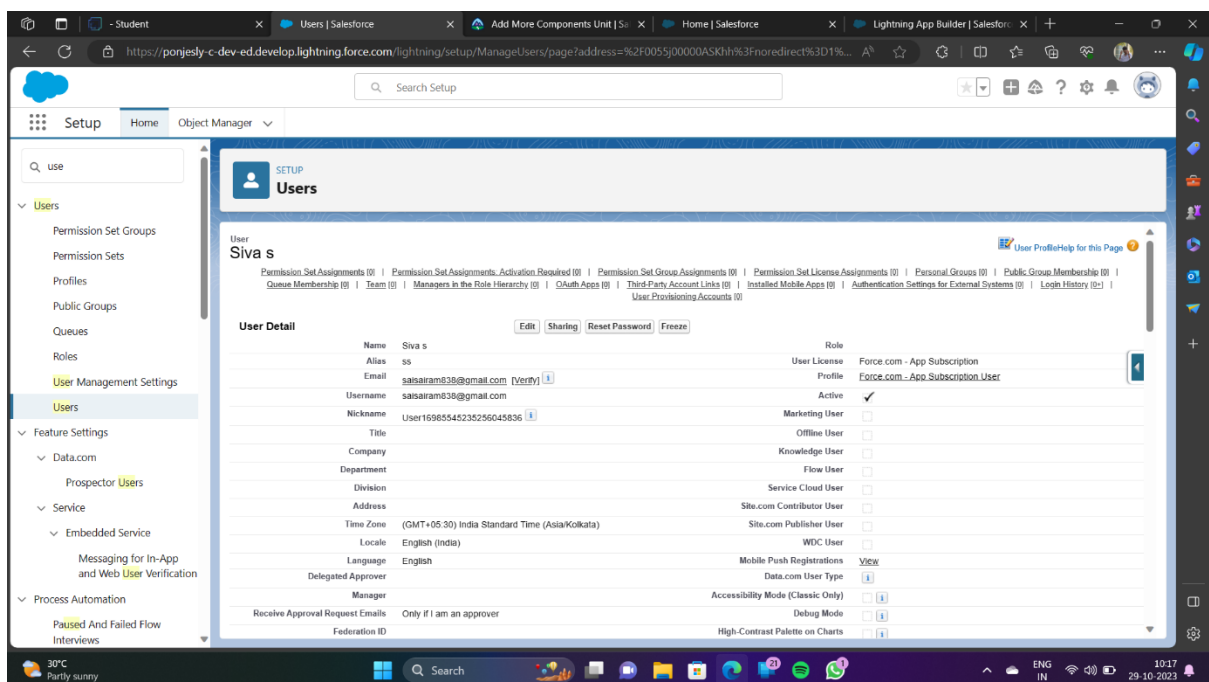
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Cancel Transaction	Cancel_Transaction__c	Text(10) (External ID)		✓
Card Number	Card_Number__c	Text(10) (External ID)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Payment Mode	Payment_Mode__c	Text(10)		
Payment Name	Name	Text(80)		✓
Transaction id (Auto number)	Transaction_id_Auto_number__c	Number(18, 0) (External ID)		✓
Visa slot	Visa_slot__c	Master-Detail(Visa slot)		✓
Visa slot number	Visa_slot_number__c	Text(10) (External ID)		✓

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Step 5: Create a Lightning App



Step 6: Create the User



Step 7: Create the User Adoption

Create Record (Passport)

The screenshot shows the 'New Passport' form in the Salesforce Lightning App Builder. The form is titled 'New Passport' and includes a search bar at the top. The form is divided into sections: 'Information' and 'Owner'. The 'Information' section contains fields for 'Passport Name', 'Contact Number', 'Full Name', 'Passport Number', and 'Permanent Address'. The 'Owner' section shows 'Siva S' as the owner. The form has a 'Cancel' button and a 'Save & New' button. The background shows the Salesforce interface with a sidebar and a top navigation bar.

New Passport

* = Required Information

Information

* Passport Name

* Contact Number

* Full Name

* Passport Number

* Permanent Address

Owner

Siva S

Cancel Save & New Save

View Record (Passport)

The screenshot shows the 'View Record' page for a Passport in the Salesforce Lightning App Builder. The page is titled 'Passport Siva' and includes a search bar at the top. The page is divided into sections: 'Related' and 'Details'. The 'Details' section contains fields for 'Passport Name', 'Contact Number', 'Full Name', 'Passport Number', 'Permanent Address', 'Created By', and 'Last Modified By'. The 'Related' section shows a list of related records. The background shows the Salesforce interface with a sidebar and a top navigation bar.

Passport Siva

New Contact Edit New Opportunity

Related

Details

Passport Name Siva

Contact Number 8,79,88,53,248

Full Name Sivaguru

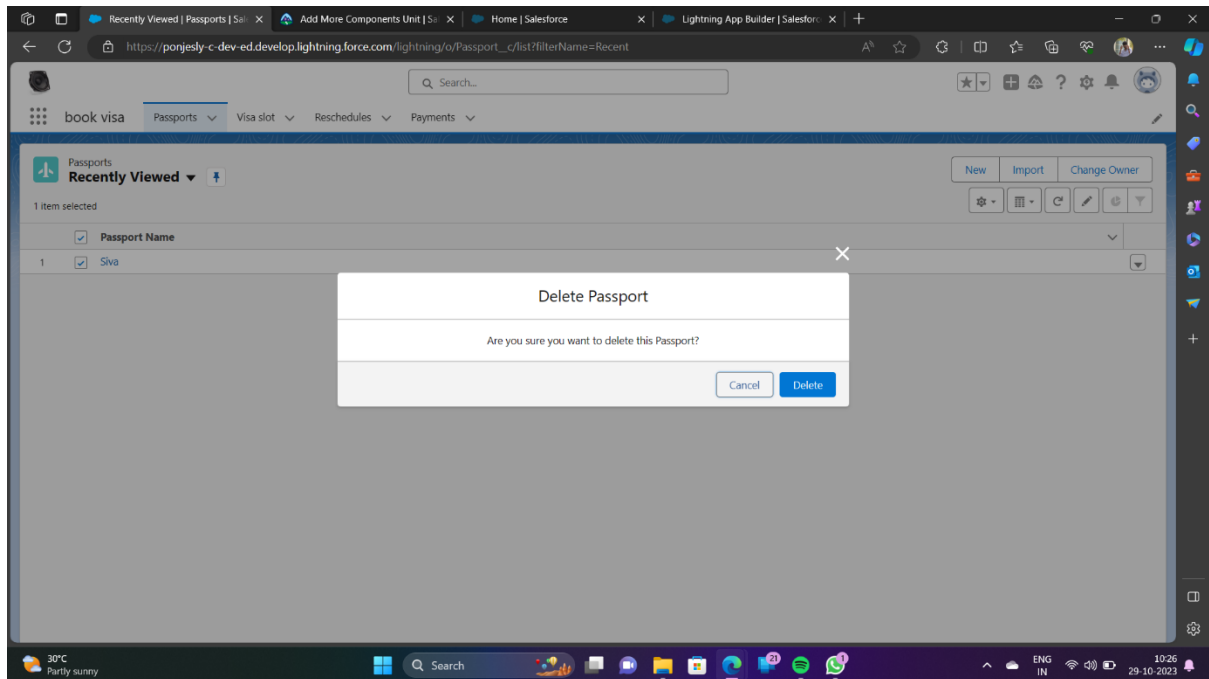
Passport Number 548769

Permanent Address nagercoil

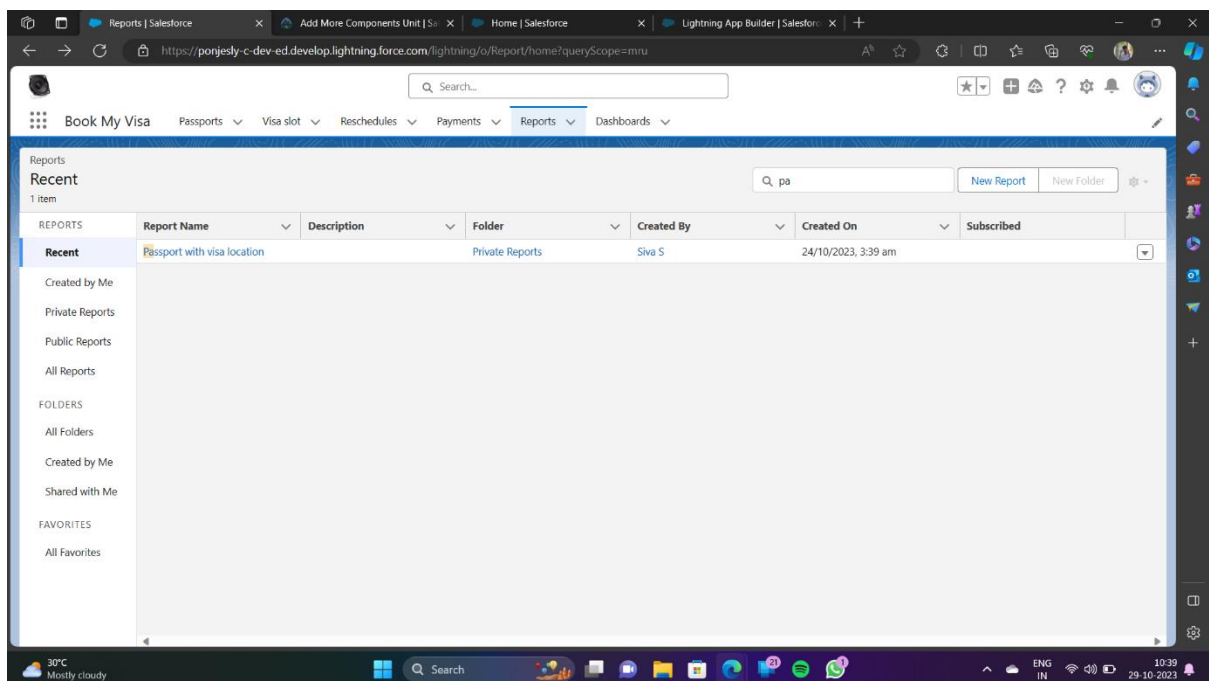
Created By Siva S, 29/10/2023, 10:24 am

Last Modified By Siva S, 29/10/2023, 10:24 am

Delete Record (Passport)



Step 8: i) Create the Reports



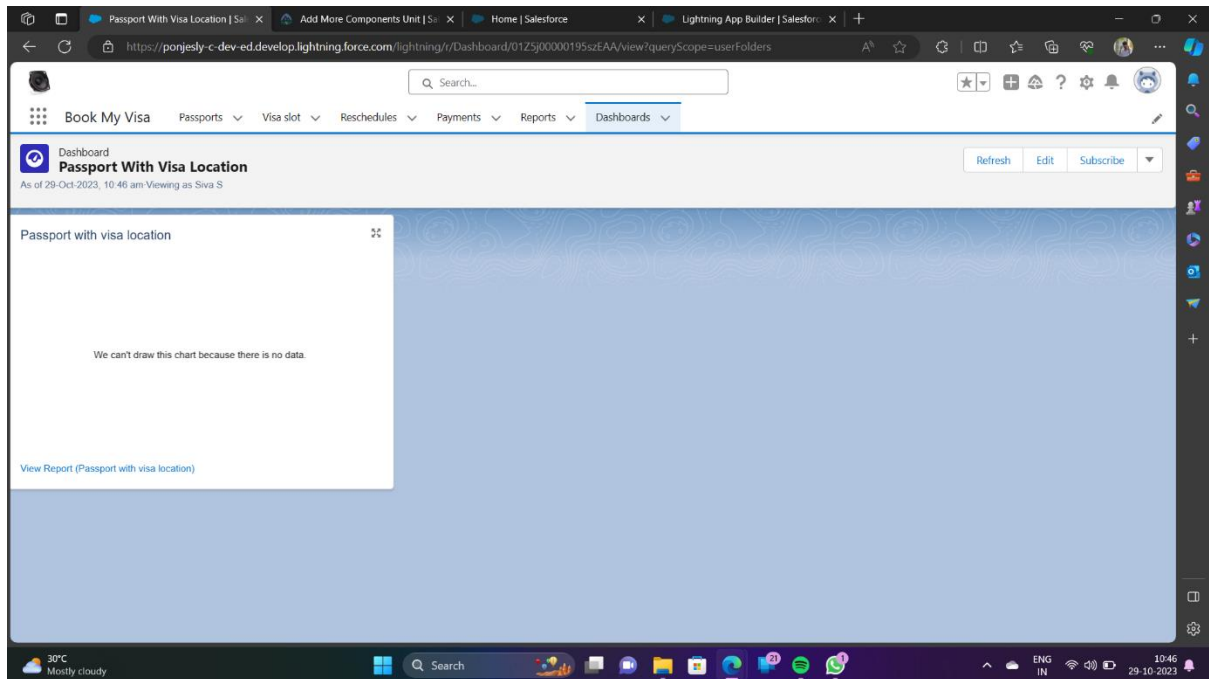
ii) View the Reports

The screenshot shows the Salesforce Lightning App Builder interface. The top navigation bar includes 'Book My Visa', 'Passports', 'Visa slot', 'Reschedules', 'Payments', 'Reports', and 'Dashboards'. The 'Reports' tab is active, showing a report titled 'Passports with Visa slot with Payments'. The left sidebar has an 'Outline' section with 'Groups' and 'Columns'. The main area displays a table with columns 'Passport Number', 'Location', and 'Total'. A message states 'No records returned. Try editing report filters.' The bottom of the interface shows various report settings like 'Row Counts', 'Detail Rows', 'Subtotals', 'Grand Total', and 'Stacked Summaries'.

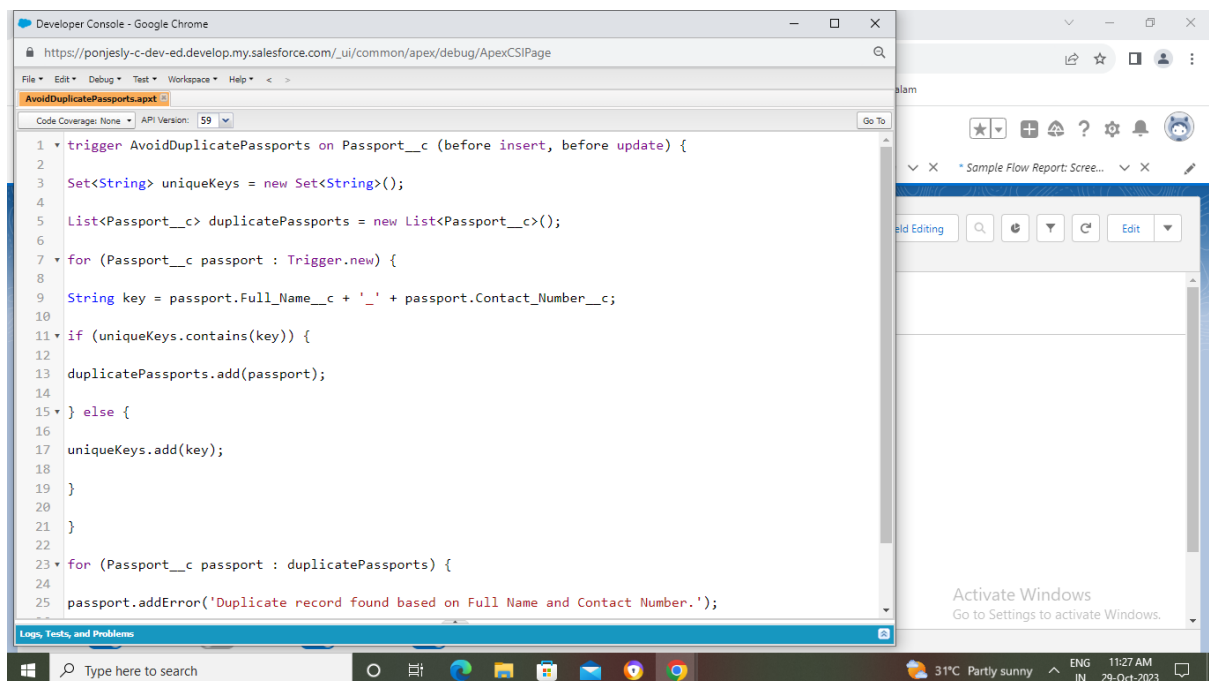
Step 9: i) Create the Dashboard

The screenshot shows the Salesforce Lightning App Builder interface. The top navigation bar includes 'Book My Visa', 'Passports', 'Visa slot', 'Reschedules', 'Payments', 'Reports', and 'Dashboards'. The 'Dashboards' tab is active, showing a dashboard titled 'Passport With Visa Location'. The left sidebar has a 'Passport with visa location' component. The main area displays a large grid of empty dashboard components. A message states 'We can't draw this chart because there is no data.' The bottom of the interface shows various dashboard settings like 'Component', 'Filter', 'Save', and 'Done'.

ii) View the Dashboard



Step 10: Create a Apex



Developer Console - Personal - Microsoft Edge
https://ponjesly-c-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSPage

File • Edit • Debug • Test • Workspace • Help • < • >

AvoidDuplicatePassport.apxt

Code Coverage: None • API Version: 59 • Go To

```
1 trigger AvoidDuplicatePassport on Passport__c (before insert) {
2 {
3
4 Set<String> uniqueKeys = new Set<String>();
5
6 List<Passport__c> duplicatePassports = new List<Passport__c>();
7
8 for (Passport__c passport : Trigger.new) {
9
10 String key = passport.Full_Name__c + '_' + passport.Contact_Number__c;
11
12 if (uniqueKeys.contains(key)) {
13
14 duplicatePassports.add(passport);
15
16 } else {
17
18 uniqueKeys.add(key);
19 }
```

Logs Tests Checkpoints Query Editor View State Progress Problems

User	Application	Operation	Time	Status	Read	Size
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Filter Click here to filter the log list

30°C Mostly cloudy Search ENG IN 10:53 29-10-2023