# Crm Application That Helps To Book A Visa Slot

## *(Developer)*

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# 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.*

## 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*

*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?"*

# Creation Of Developer Org:
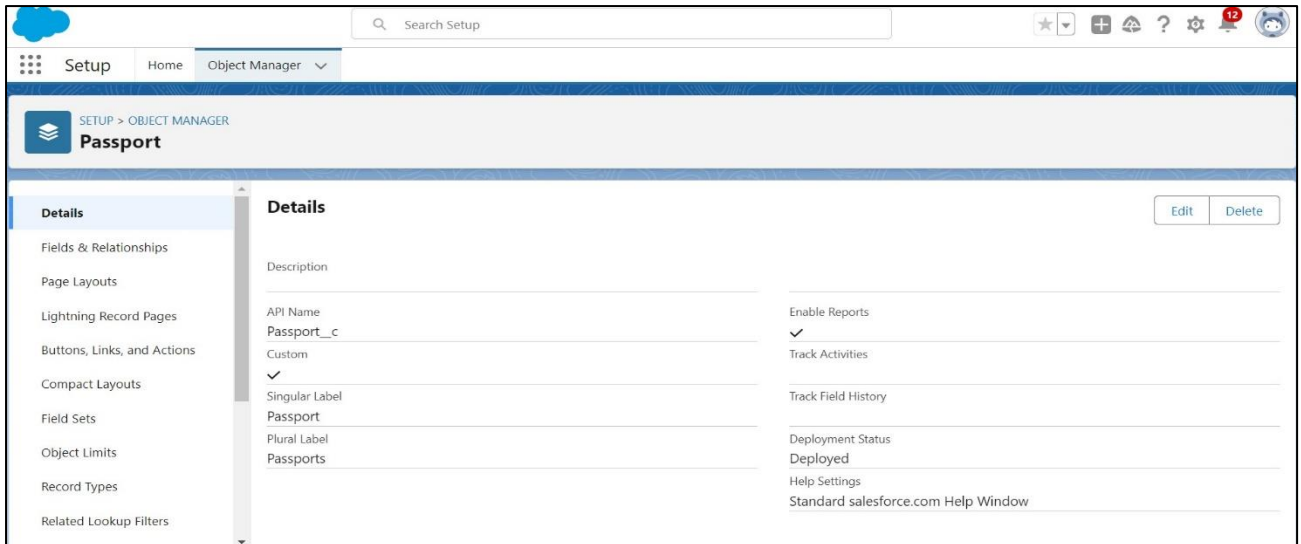## Creating a developer org in salesforce.
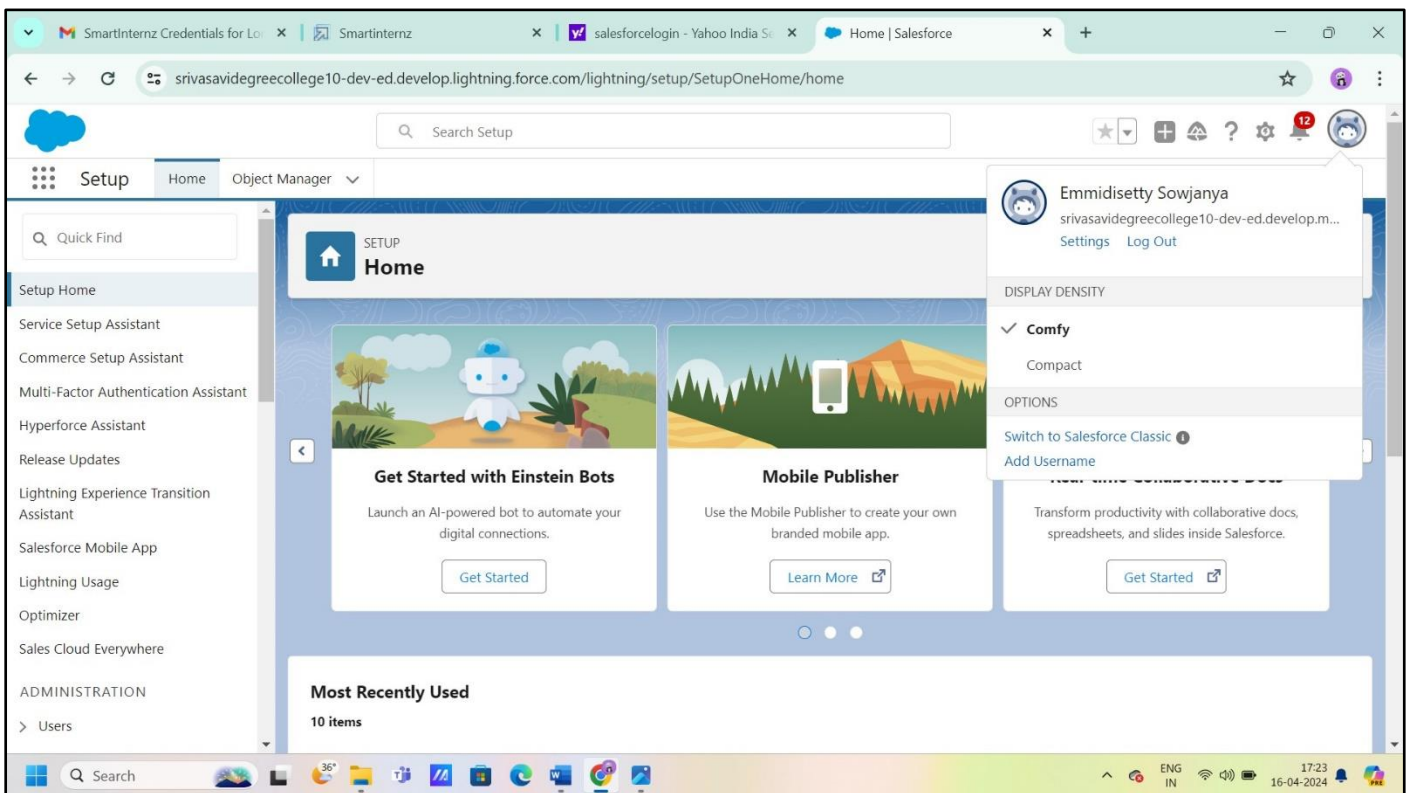


# Objects Creation

*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.

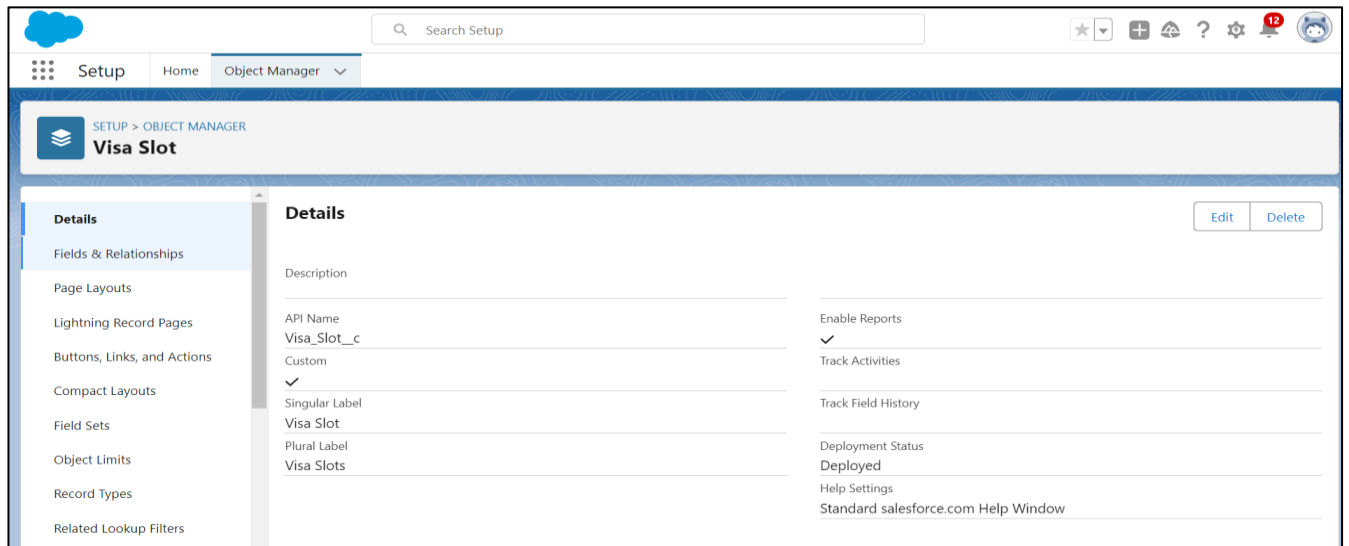2) Custom objects.

- ## **Creation Of Custom Object Passport:**



- ## **Creation Of Custom Object-Visa Slot:**



- ## **Creation Of Custom Object- Payment:**

# Tabs:

*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 sections-*

1. **Standard Object Tabs**
2. **Custom Object Tabs**
3. **Web Tabs**
4. **Visualforce Tabs**

- ## Creation Of Custom Tab- Passport Object :

  SETUP
  **Tabs**

  Custom Object Tab
  **Passports**

  Below is the information for the custom tab. Click Edit to change the custom tab.

  Help for this Page

  **Custom Tab Definition Detail**        Edit    Delete

  | | | | |
  |---|---|---|---|
  | Tab Label | Passports | Tab Style | Chess piece |
  | Object | Passport | Splash Page Custom Link | |
  | Description | | | |
  | Created By | Emmidisetty Sowjanya, 10/04/2024, 5:10 pm | Modified By | Emmidisetty Sowjanya, 10/04/2024, 5:10 pm |

- ## Creation Of Custom Tab- Visa Slot Object :

  SETUP
  **Tabs**

  Custom Object Tab
  **Visa Slots**

  Below is the information for the custom tab. Click Edit to change the custom tab.

  Help for this Page

  **Custom Tab Definition Detail**        Edit    Delete

  | | | | |
  |---|---|---|---|
  | Tab Label | Visa Slots | Tab Style | Car |
  | Object | Visa Slot | Splash Page Custom Link | |
  | Description | | | |
  | Created By | Emmidisetty Sowjanya, 10/04/2024, 8:09 pm | Modified By | Emmidisetty Sowjanya, 10/04/2024, 8:09 pm |

- ## Creation Of Custom Tab- Payment Object :

  SETUP
  **Tabs**

  Custom Object Tab
  **Payments**

  Below is the information for the custom tab. Click Edit to change the custom tab.

  Help for this Page

  **Custom Tab Definition Detail**        Edit    Delete

  | | | | |
  |---|---|---|---|
  | Tab Label | Payments | Tab Style | Heart |
  | Object | Payment | Splash Page Custom Link | |
  | Description | | | |
  | Created By | Emmidisetty Sowjanya, 10/04/2024, 8:10 pm | Modified By | Emmidisetty Sowjanya, 10/04/2024, 10:57 pm |

# Relationships Between Two 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.*

**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.*

**Lookup relationship:**

*Lookup Relationship in Salesforce links two objects together but has no effect on deletion or security.*

- ## Relationship Creation :



Visa Slot Custom Field
## Passport Number
Back to Visa Slot

Help for this Page

Validation Rules (0)

| Custom Field Definition Detail | Edit | Set Field-Level Security | View Field Accessibility | Where is this used? |

**Field Information**

| | | | |
|---|---|---|---|
| Field Label | Passport Number | Object Name | Visa Slot |
| Field Name | Passport_Number | Data Type | Master-Detail |
| API Name | Passport_Number__c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | Emmidisetty Sowjanya, 10/04/2024, 8:19 pm | Modified By | Emmidisetty Sowjanya, 10/04/2024, 8:19 pm |

**Master-Detail Options**

| | | | |
|---|---|---|---|
| Related To | Passport | Child Relationship Name | Visa_Slots |
| Related List Label | Visa Slots | | |
| Sharing Setting | Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records. | | |
| Reparentable Master Detail | ☐ | | |

**Lookup Filter**

No lookup filters defined.

**Validation Rules** | New | Validation Rules Help ?

No validation rules defined.

# Field Creation:

- ➤ ## Field Creation Full Name

- ➤ ## Field Creation-Contact Number

- ➤ ## Field Creation- Permanent Address



**Fields & Relationships**
7 Items, Sorted by Field Label

Quick Find | New | Deleted Fields | Field Dependencies | Set History Tracking

| FIELD LABEL ▲ | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED | |
|---|---|---|---|---|---|
| Contact Number | Contact_Number__c | Number(10, 0) | | | ▼ |
| Created By | CreatedById | Lookup(User) | | | |
| Full Name | Full_Name__c | Text(80) | | | ▼ |
| Last Modified By | LastModifiedById | Lookup(User) | | | |
| Owner | OwnerId | Lookup(User,Group) | | ✓ | |
| Passport Number | Name | Text(80) | | ✓ | ▼ |
| Permanent Address | Permanent_Address__c | Text Area(255) | | | ▼ |

# Fields Available On Custom Object : Visa



**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) | | | ▼ |
| Passport Number | Passport_Number__c | Master-Detail(Passport) | | ✓ | ▼ |
| Status | Status__c | Picklist | | | ▼ |
| Time | Time__c | Date/Time | | | ▼ |
| Visa Slot Number | Visa_Slot_Number__c | Auto Number | | | ▼ |
| Visa Slot Number | Name | Auto Number | | ✓ | ▼ |

### ➢ Field Available On Custom Object: 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(30) | | | ▼ |
| Card Number | Card_Number__c | Number(18, 0) | | | ▼ |
| Created By | CreatedById | Lookup(User) | | | |
| Last Modified By | LastModifiedById | Lookup(User) | | | |
| Payment Mode | Payment_Mode__c | Picklist | | | ▼ |
| Transaction Id | Transaction_Id__c | Auto Number | | | ▼ |
| Transaction Id | Name | Auto Number | | ✓ | ▼ |
| Visa Slot Number | Visa_Slot_Number__c | Master-Detail(Visa Slot Number) | | ✓ | ▼ |

## 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

### • Creation Of App:
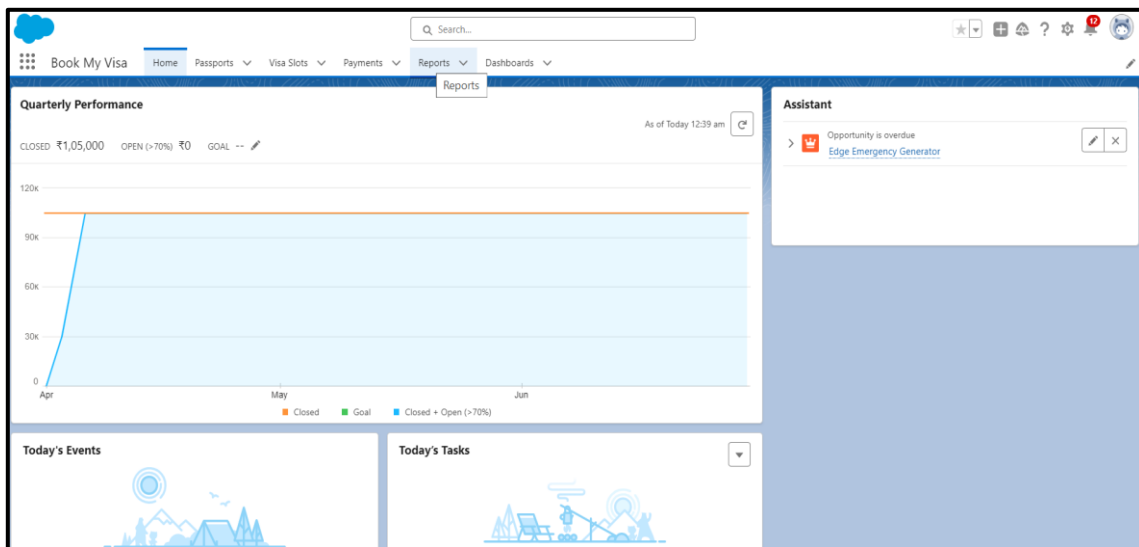


## User:

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.

# ➢ Creation Of User

**SETUP**
**Users**

User
**S K**

User ProfileHelp for this Page

Permission Set Assignments [0] | Permission Set Assignments: Activation Required [0] | Permission Set Group Assignments [0] | Permission Set License Assignments [0] | Personal Groups [0] | Public Group Membership [0] | Queue Membership [0] | Team [0]
Managers in the Role Hierarchy [0] | OAuth Apps [0] | Third-Party Account Links [0] | Installed Mobile Apps [0] | Authentication Settings for External Systems [0] | Login History [1+] | User Provisioning Accounts [0]

**User Detail**
[ Edit ] [ Sharing ] [ Reset Password ] [ Freeze ]

| | | | |
|---|---|---|---|
| Name | S K | Role | |
| Alias | sk | User License | Salesforce Platform |
| Email | sandeep121188@gmail.com [Verified] | Profile | Standard Platform User |
| Username | sandeep121188@gmail.com | Active | ✓ |
| Nickname | User17127703803655832539 ⓘ | Marketing User | ☐ |
| Title | | Offline User | ☐ |
| Company | | Knowledge User | ☐ |
| Department | | Flow User | ☐ |
| Division | | Service Cloud User | ☐ |
| Address | | Site.com Contributor User | ☐ |
| Time Zone | (GMT+05:30) India Standard Time (Asia/Kolkata) | Site.com Publisher User | ☐ |
| Locale | English (India) | WDC User | ☐ |
| Language | English | Mobile Push Registrations | View |
| Delegated Approver | | Data.com User Type | ⓘ |
| Manager | | Accessibility Mode (Classic Only) | ☐ ⓘ |
| Receive Approval Request Emails | Only if I am an approver | Debug Mode | ☐ ⓘ |
| Federation ID | | High-Contrast Palette on Charts | ☐ ⓘ |
| App Registration: One-Time Password Authenticator | ⓘ | Load Lightning Pages While Scrolling | ✓ ⓘ |

# ➢ 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-*

**Public read/write/transfer (Only available for Leads and Cases)**
**Public read/write**
**Public read only**
**Privateer Adoption**

**SETUP**
**Sharing Settings**

| | | | |
|---|---|---|---|
| Passport | Public Read/Write | Public Read/Write | ✓ |
| Passport Number | Public Read/Write | Private | ✓ |
| Payment | Controlled by Parent | Controlled by Parent | |
| Visa Slot | Controlled by Parent | Controlled by Parent | |
| Visa Slot Number | Public Read/Write | Private | ✓ |

**Other Settings**                                                        Other Settings Help ?

| | | |
|---|---|---|
| Manager Groups | ☐ ⓘ | |
| Secure guest user record access | ✓ ⓘ | |
| Require permission to view record names in lookup fields | ☐ ⓘ | |

**Sharing Rules**

**Lead Sharing Rules**        [ New ] [ Recalculate ]                    Lead Sharing Rules Help ?

No sharing rules specified.

# User Adoption :

## To Create a Record on Passport object

### ➤ 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.
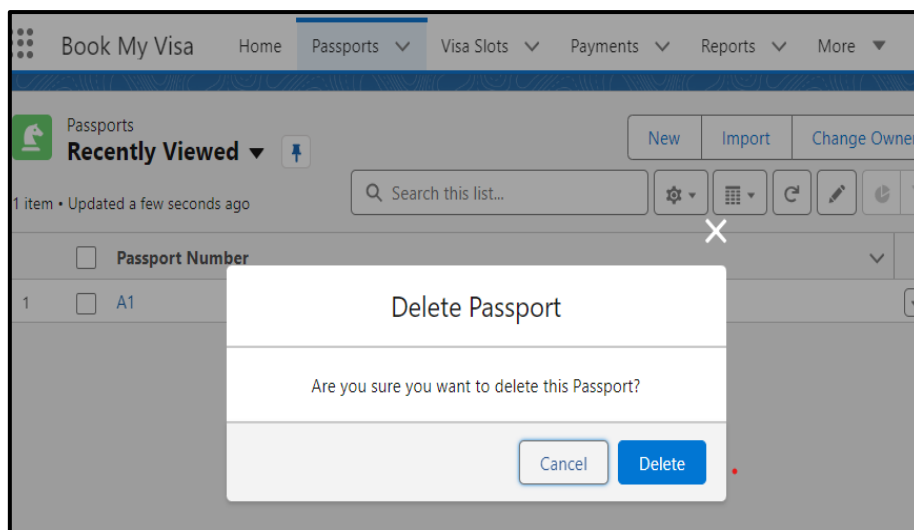6. Click on Save Button



### ➤ View Record- Passport:

*Click on any record name. you can see the details of the Driver*

## ➤ Delete Records- Passport :



## 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.*
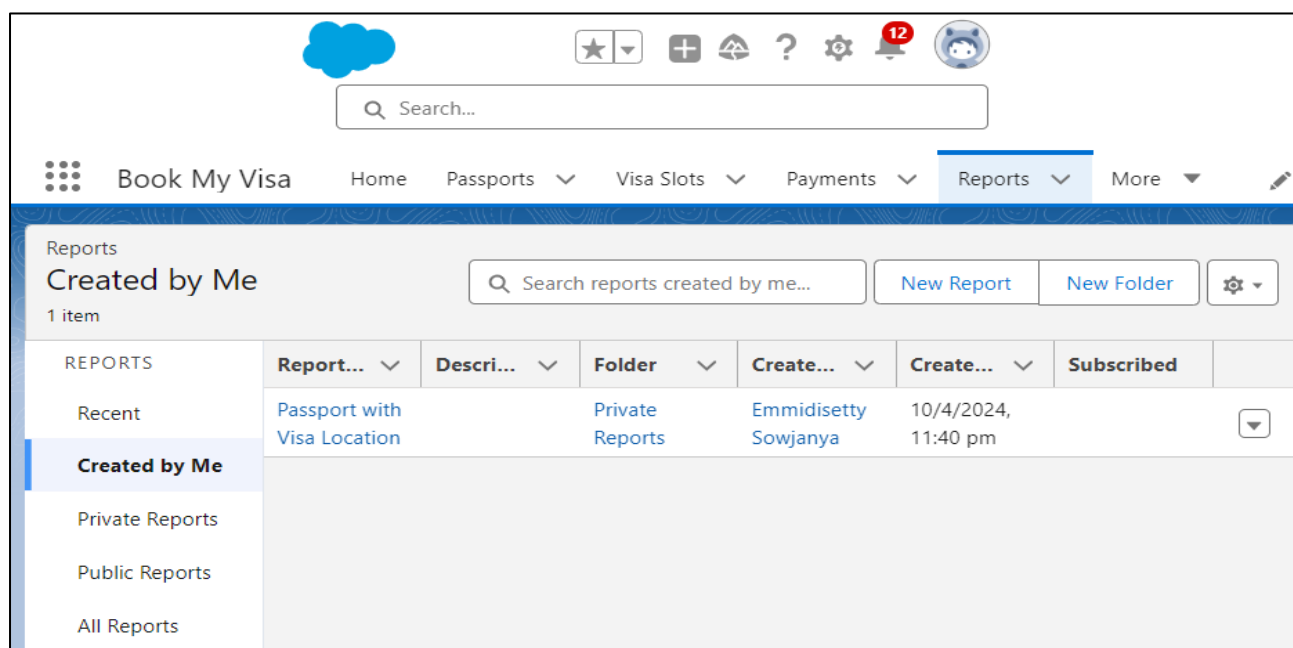
        *There are 4 types of report formats in salesforce.*

1. **Tabular Reports**
2. **Matrix Reports**
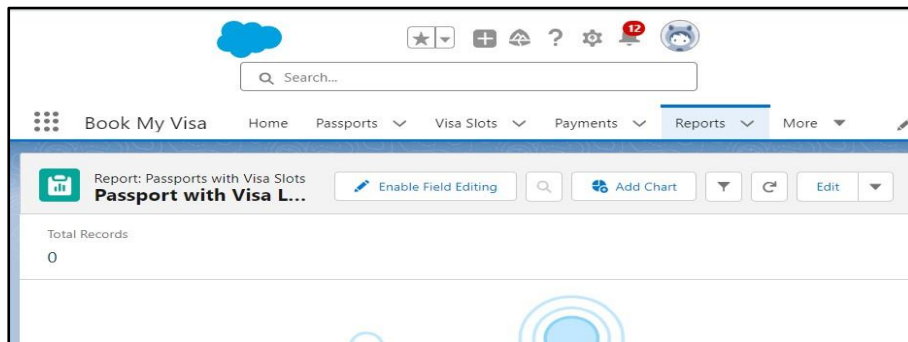3. **Joined Reports**
4. **Report Type**

## ➤ 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.*

## ➤ View Report :



# 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 glimpse. Reports can be displayed in the dashboard like: Horizontal Bar chart, Vertical Bar Chart, Line Chat, Donut Chart, Metric Chart, Stacked Vertical Bar Chart, Stacked Horizontal Bar Chart, etc.*

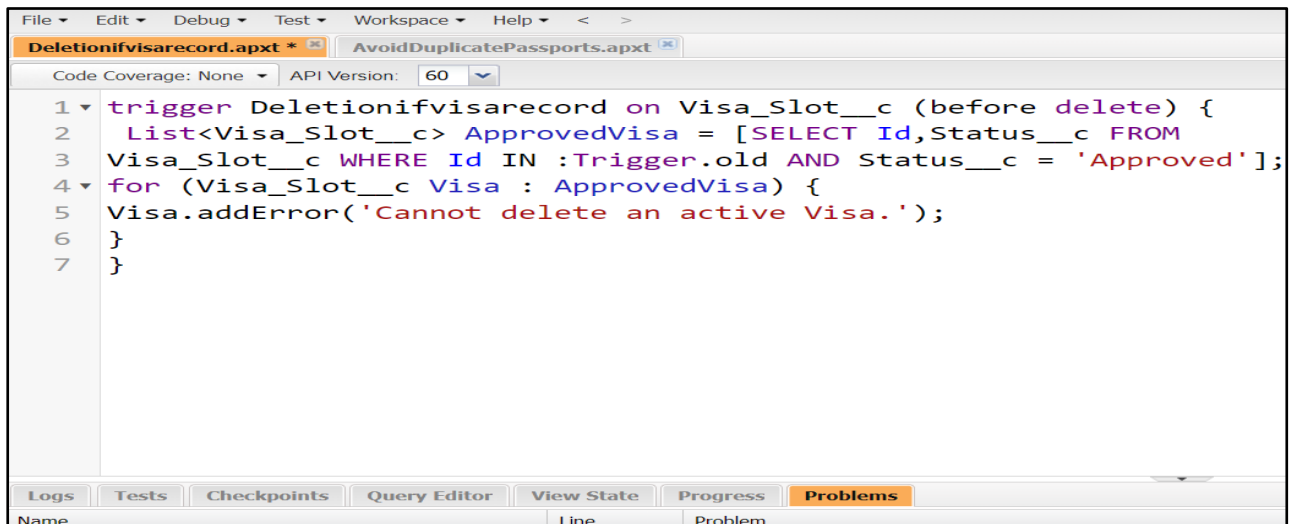## ➤ Creation Of Dashboard
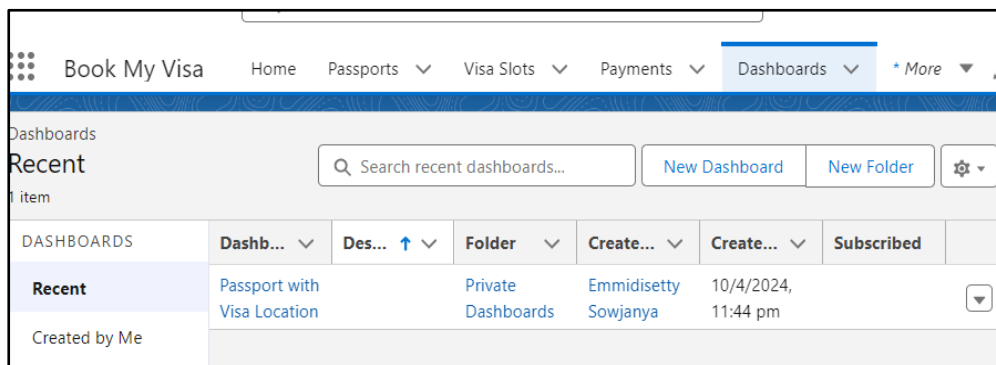


## ➤ View Dashboard
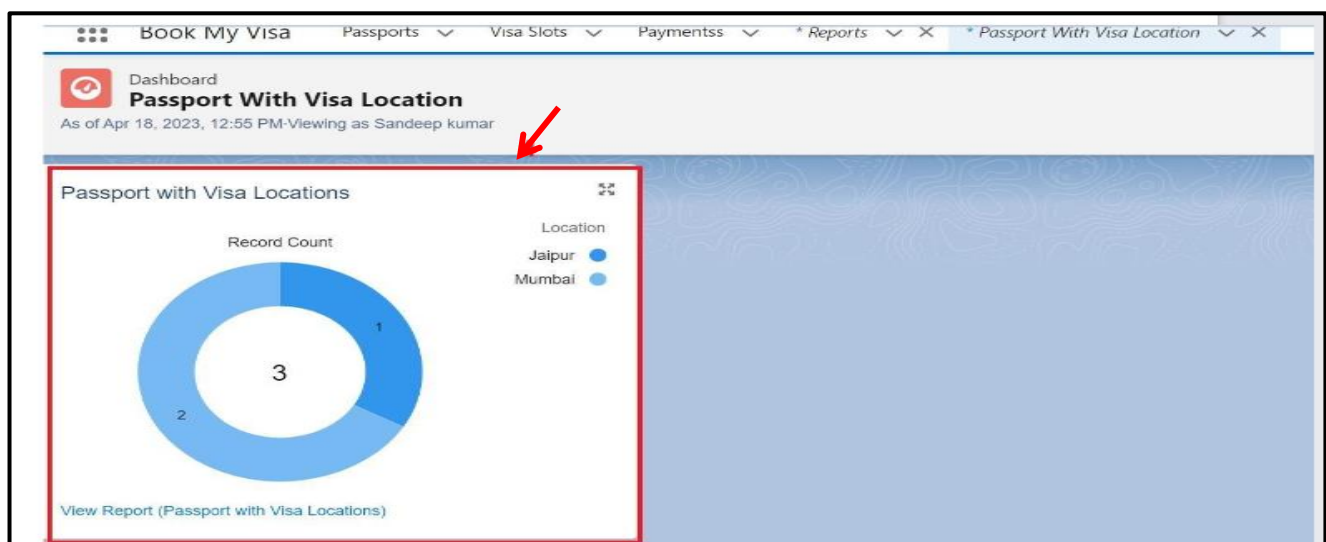
# Apex Triggers :

*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.*
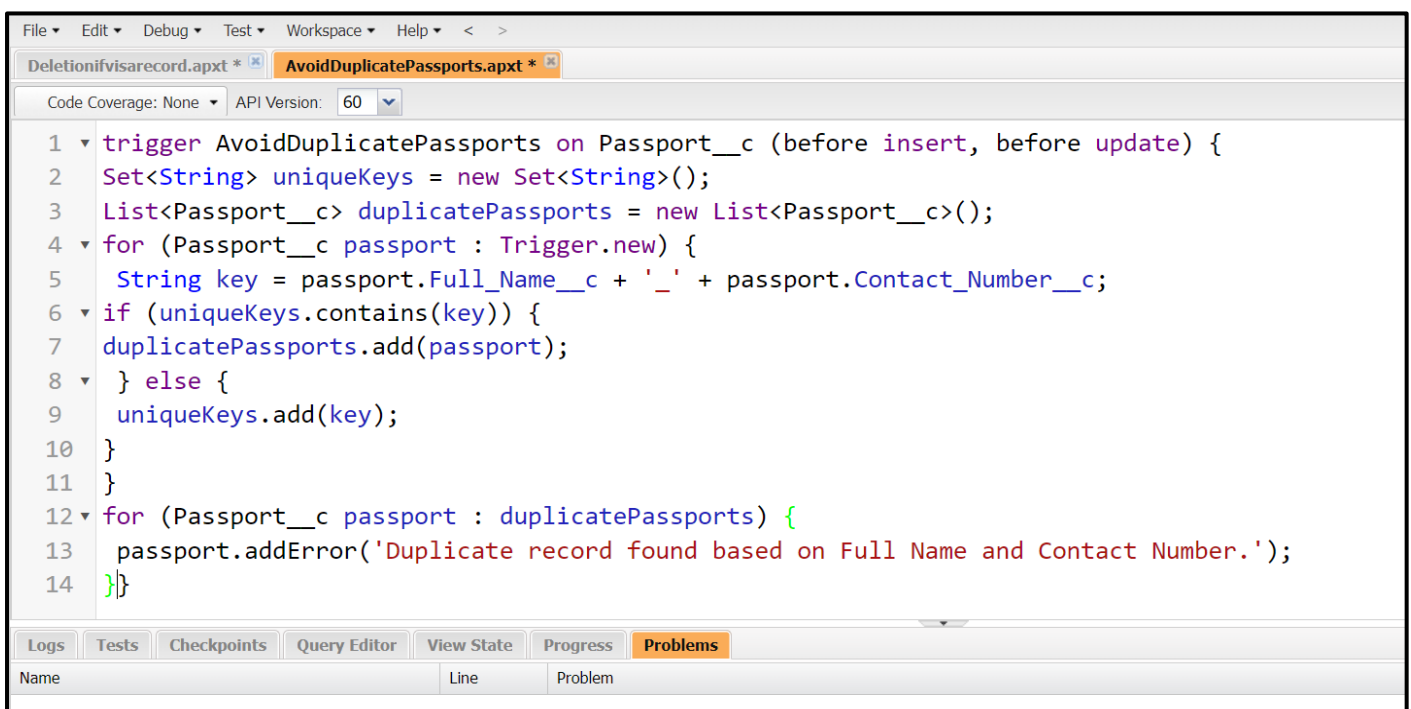
- ## Write A Trigger-1 : *Deletionofvisarecord*

1. Give the name as Deletionofvisarecord
2. And S object has Visa Object
3. Scenario - You cannot delete active visa record.

```
trigger Deletionifvisarecord on Visa_Slot__c (before delete) {
  List<Visa_Slot__c> ApprovedVisa = [SELECT Id,Status__c FROM
Visa_Slot__c WHERE Id IN :Trigger.old AND Status__c = 'Approved'];
for (Visa_Slot__c Visa : ApprovedVisa) {
Visa.addError('Cannot delete an active Visa.');
}
}
```

- ## Write A Trigger-2 : *AvoidDuplicatePassport*

- Give the name as AvoidDuplicatePassport
- And S object has Passport Object
- 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.');
}}
```

## comments:

I am thrilled to have acquired a wealth of knowledge in Salesforce admin/developer, along with my team. The structured approach of tackling the Trailmix modules step by step has made the learning process both engaging and rewarding. With this experience of tackling modules I have successfully completed my project.

I extend my sincere gratitude to our respected college principal, Sri M. Rama Krishna , for his cooperation and support throughout the internship program.

A special mention goes to my esteemed mentor, Sri L. Lakshmi Narayana, whose guidance has been instrumental in leading our team to success in our project work. I am truly grateful to Smart Bridge for providing us with this invaluable opportunity.

Thank you, SMART BRIDGE.

*--**EMMIDISETTY SOWJANYA**,*
*Team Leader.*