Project Report on

CRM Application That Helps To Book A Visa Slot

(Developer) - (Long Term)

Milestone - 01 : Create Salesforce Org

Go to developer.salesforce.com/Signup

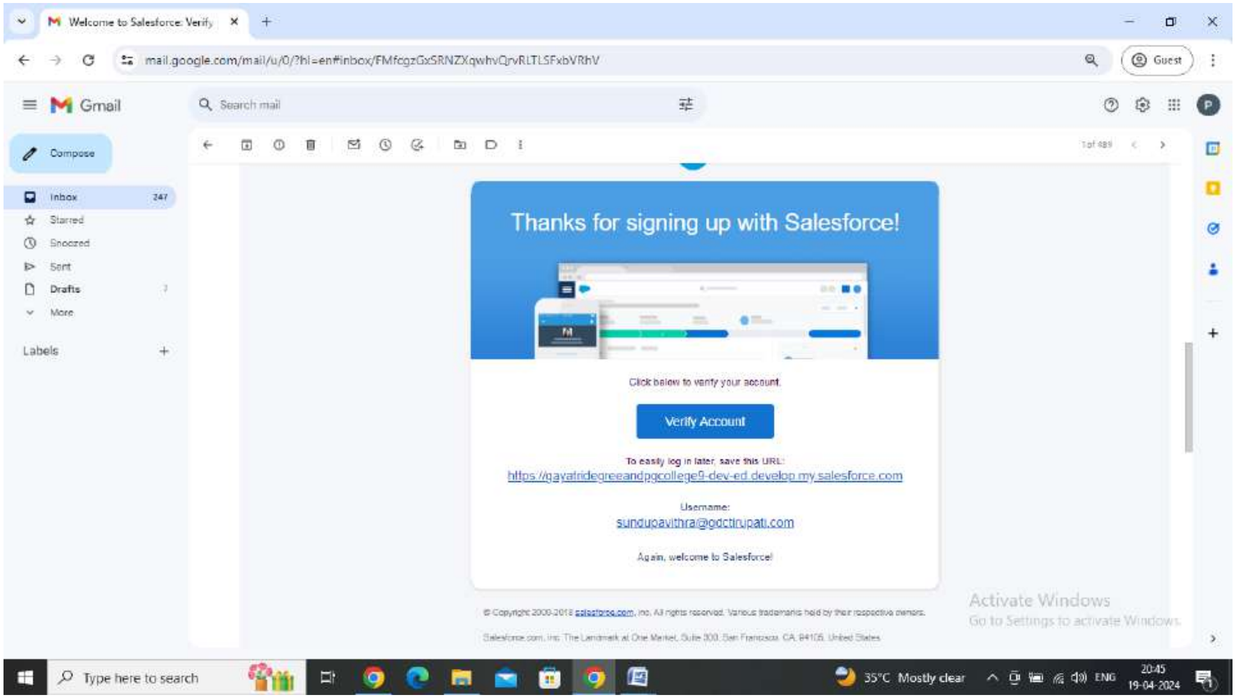
Click on Signup.

On the Signup form,enter the following details:

1. First Name & Last Name —Sundu pavithra
2. Email — sundapavithra123@gmail.com
3. Role - Developer
4. Company - GAYATRI DEGREE COLLEGE - TIRUPATI
5. Country - India
6. Postal Code - 517501
7. Username - sundupavithra@gdctirupati.com

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 5-10 min as

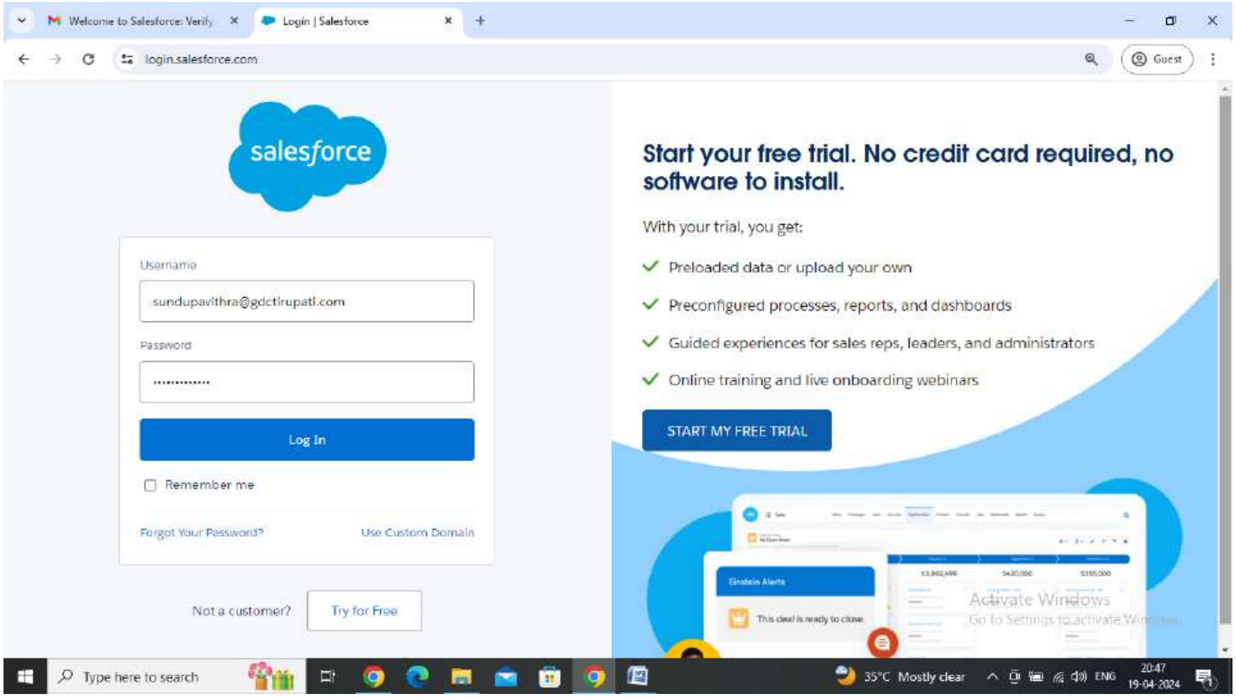


Login to your Salesforce Org

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 - 02 : **Objects Creation**

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

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

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

5.Label: Passport

6.Plural Label: Passports

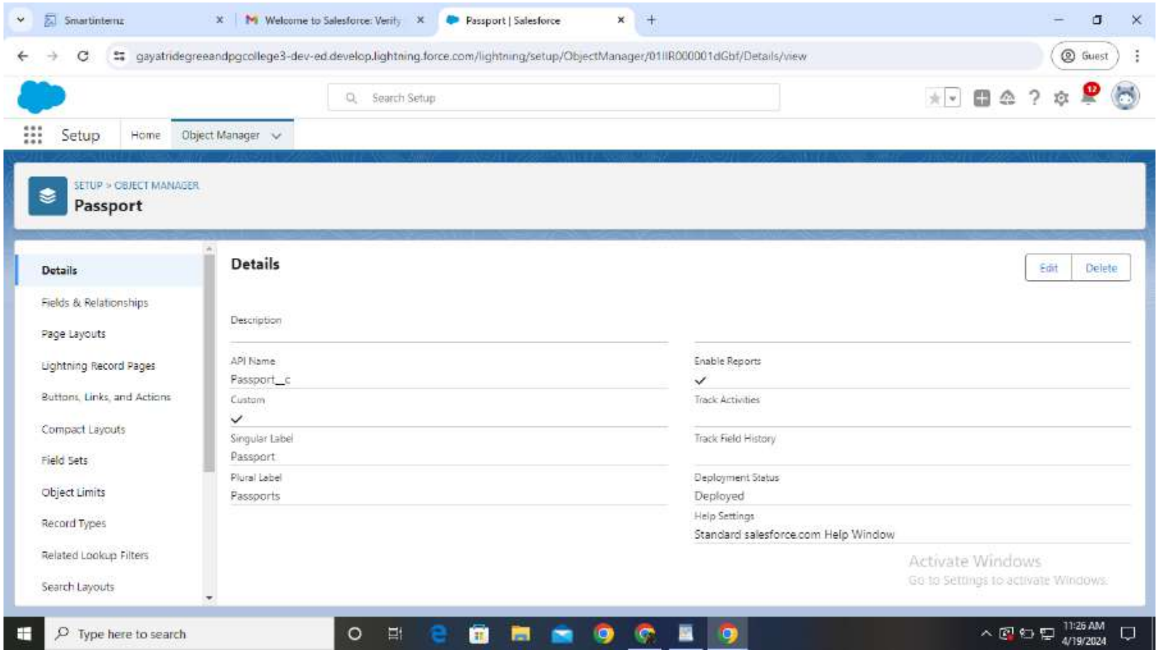
7.Record Name: Passport Number

8.Check the Allow Reports checkbox

9.Check the Allow Search checkbox

10.Click Save

In the same way create 2 more objects Visa Slot , Payment



Milestone - 03 : **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-

Standard Object Tabs

Custom Object Tabs

Web Tabs

Visualforce Tabs

Creation Of Custom Tab- Passport Object

1.Navigate to setup and home

2.Enter Tabs in Quick Find Box and select Tabs

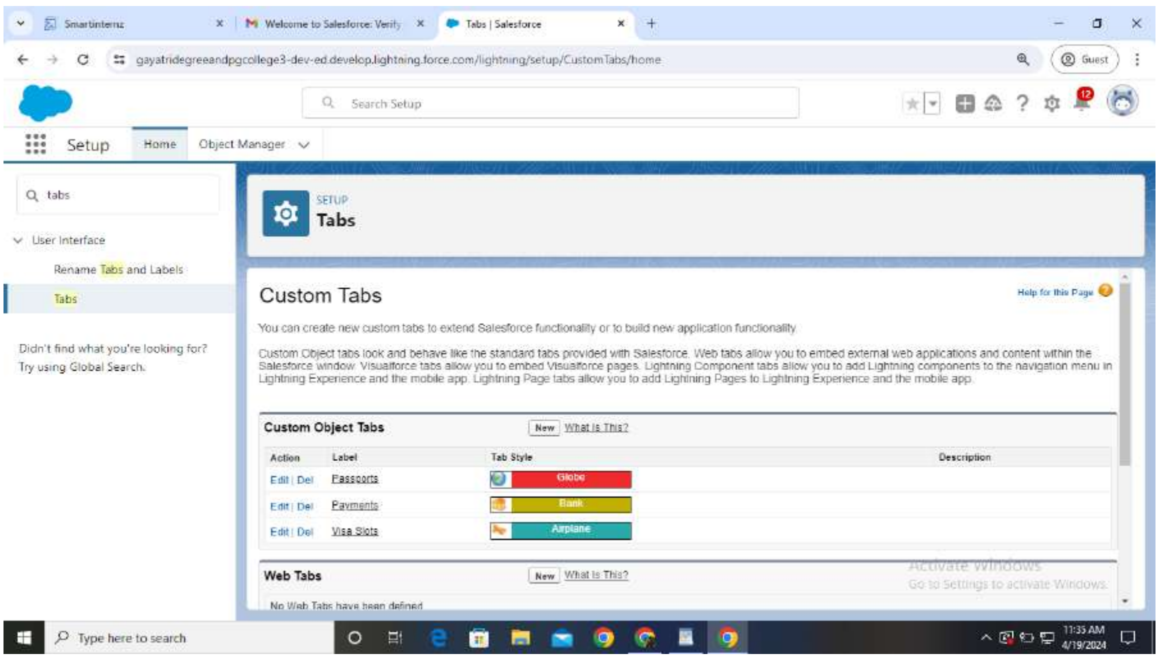
3.Under Custom Object Tabs, click New

4.For Object, select Passport

5.For Tab Style, select any icon

6.Leave all defaults as is. Click Next, Next, and Save

7.In the same way create tabs for Visa Slot, Pyments.



Milestone - 04 : **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.

Primarily there are two types of relationships:

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

Look up relationship: Lookup Relationship in Salesforce links two objects together but has no effect on deletion or security.

Relationship Creation

1.Fields Creation: Passport Number

2.Navigate to setup

3.Click on Object Manager and search and select Visa Slot object

4.Select Fields & Relations and click New.

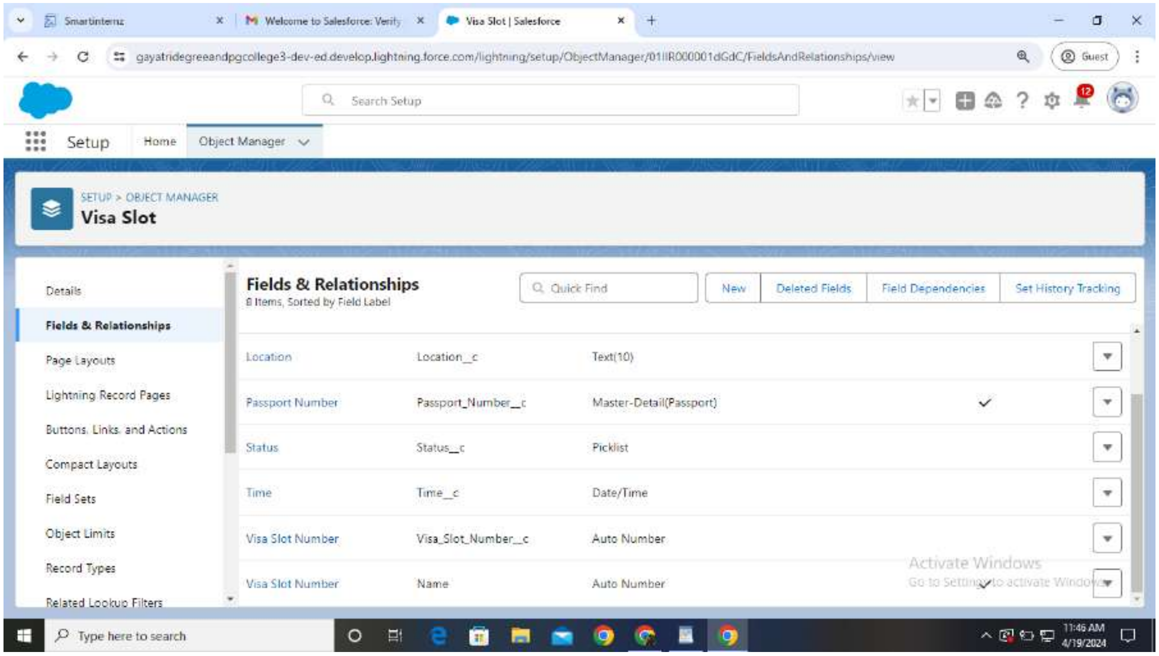
5.Select Data Type: Master-Detail, next.

6.Related to: Passport, next.

7.Label: Passport Number

8.Child Relationship Name: Visa Slot, next.

9.Next, next and save.



Milestone - 05 : **Field Creation**

Field Name Data Type

Full Name Text

Contact Number Number

Passport Number Text

Permanent Address Text

Field Creation Full Name

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, click on next

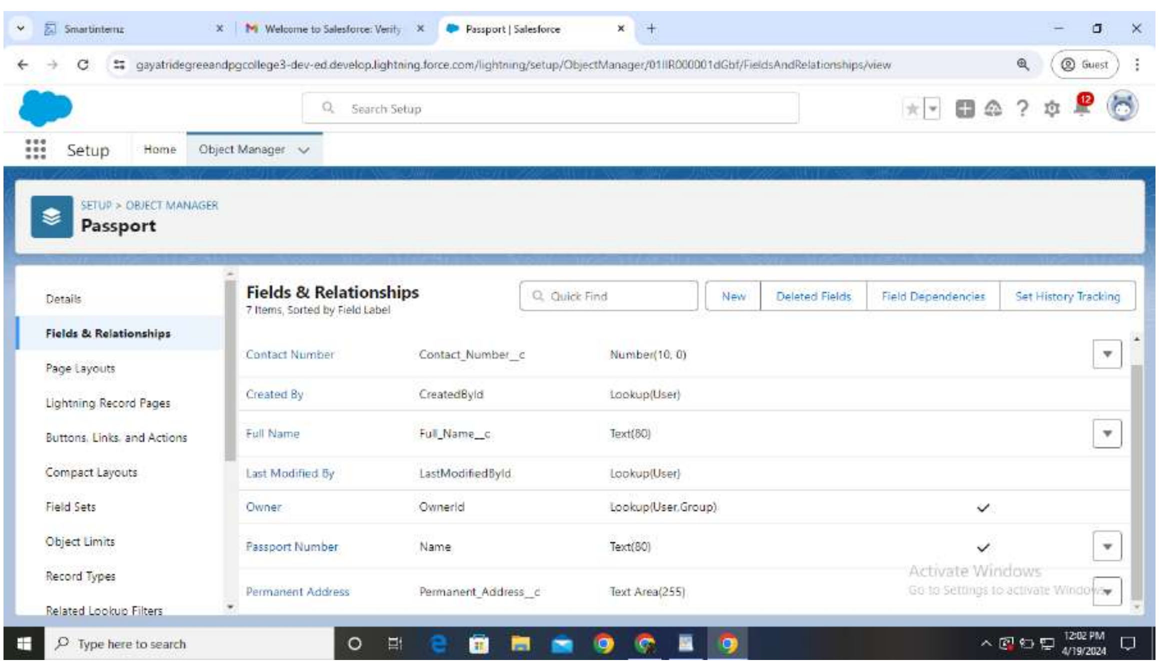
7.Field Label: Full Name

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)



Fields Available On Custom Object: Visa

Slot Field Name Data Type

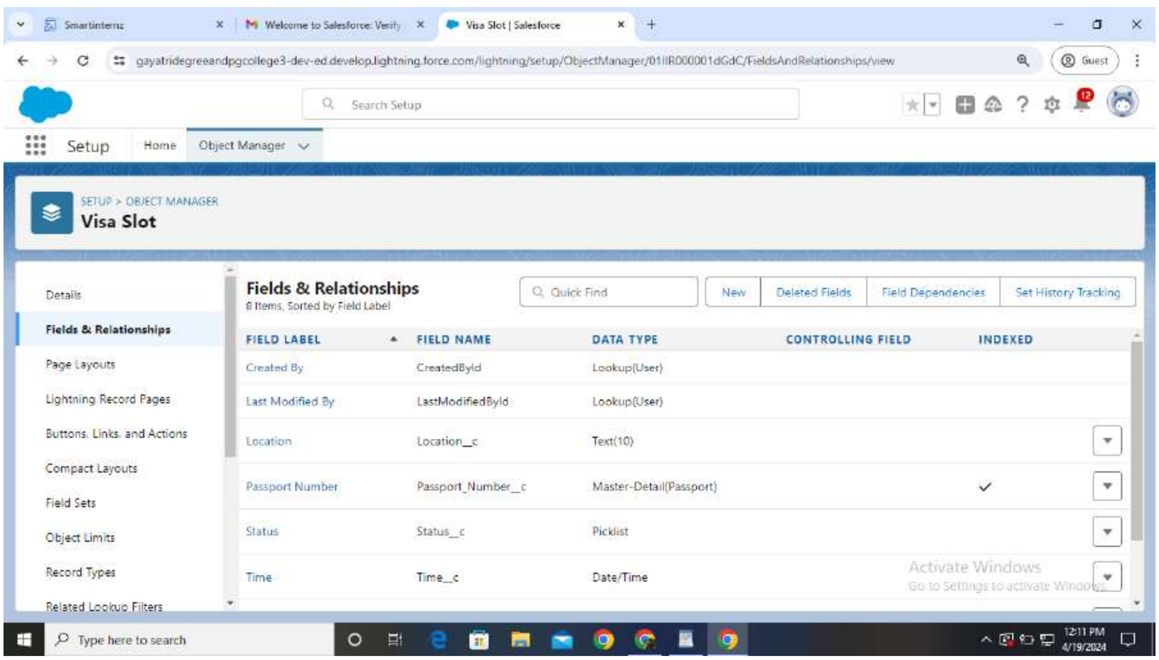
Location Text

Time Date & Time

Visa Slot Number Auto Number (Use in Record Name)

Passport Number Master-Detail

Status Picklist



Field Available On Custom Object: Payment

Field Name Data Type

Payment ModePicklist (Values- Debit Card, Credit Card)

Card Number	Number
Transaction Id	Auto Number (Used in Record Name)
Visa Slot Number	Master-Detail
Cancel Transaction	Text

Milestone - 06 : **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:

Standard Apps

Custom Apps

Creation Of App

1.Click on setup and go to home page.

2.In Quick Find Box search and select App Manager.

3.Click: New Lightning App.

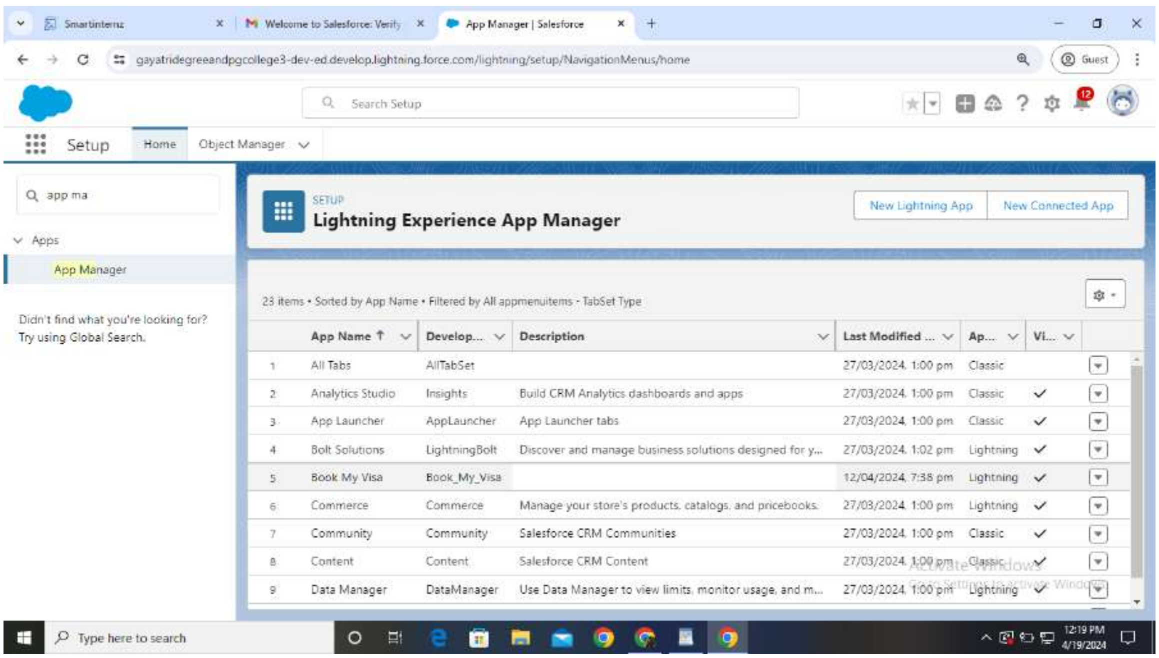
4.App Name: Book My Visa and click on next.

5.Navigate System: Standard Navigation Support Form Factor: Desktop and Phone Click next, next

6.Move Objects from available items to selected items. (Passport, Visa Slot, Payment).

7.Add System Administrator profile, available profile to selected profile.

8.Save & Finish



Milestone - 07 : **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 dont find Salesforce license then deactivate a user who has Salesforce license or change the license type from Salesforce to any other.

Creation Of User

1.Navigate to setup

2.In Quick Find box select and search: User

3.Click: New user

4.Give First and Last Name

5.Enter your email in the email field

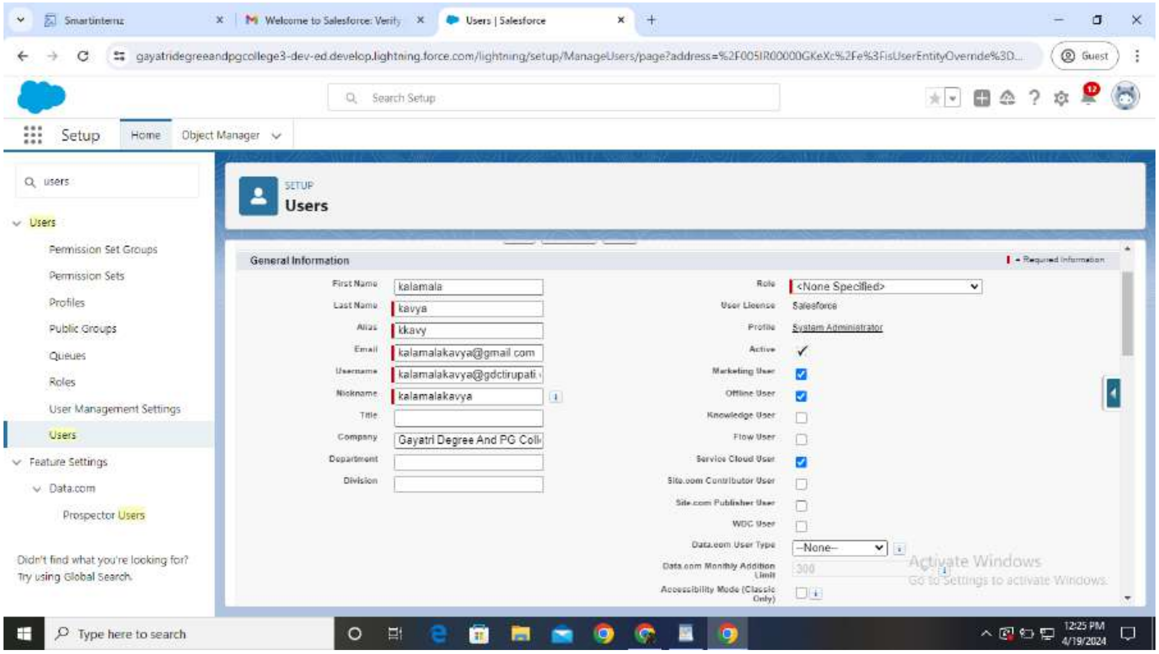
6.Enter user name, it must be unique

7.User license: salesforce platform

8.In the profile field: Standard user profile

9.Check, Generate new password and notify user immediately

10.Save



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

Private

1.Steps of OWD settings:

2.Navigate setup in Quick Find search bar

3.Type Sharing Setting and Select it.

4.Edit: Organization Wide Defaults.

5.Scroll down list and select Passport object and change the default external Access to Public Read/Write.

6.Save.

Milestone - 08 : **User Adoption**

To Create a Record on Passport object

Create Record- Passport

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

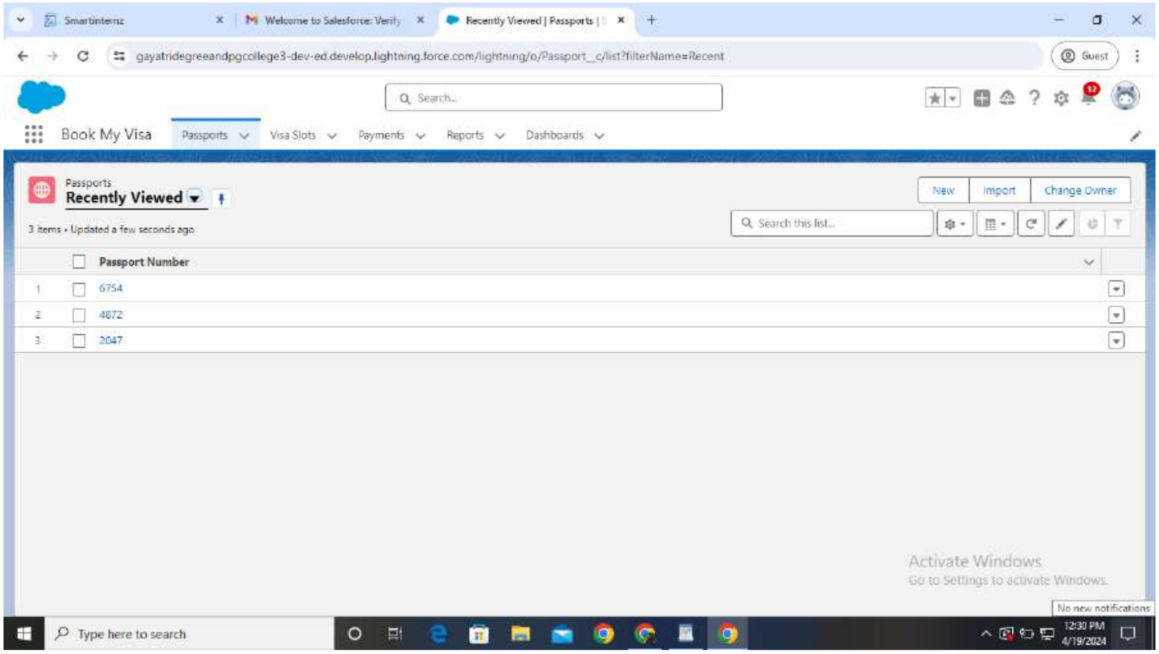
2.Search Book My Visa App & click on it.

3.Click on Passport tab.

4.Click new button

5.Fill all Passport record details.

6.Click on Save Button.



View Record- Passport

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

Milestone -09 : **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:

Tabular Reports:

This is the most basic report format. It just displays the row of records in a table with a grandtotal. While easy to set up they cant 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.

Summary Reports:

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

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 togenerate dashboards. Charts can be added to this type of report.

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 mustbe linked together either directly or indirectly.

A report type cannot include more than 4 objects.

Once a report is created its report type cannot be changed.

There are 2 types of report types:

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 customfields 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.

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 typescannot 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 directlyor indirectly.

There are 3 types of access levels of folders:

Viewer:

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

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.

Manager:

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

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

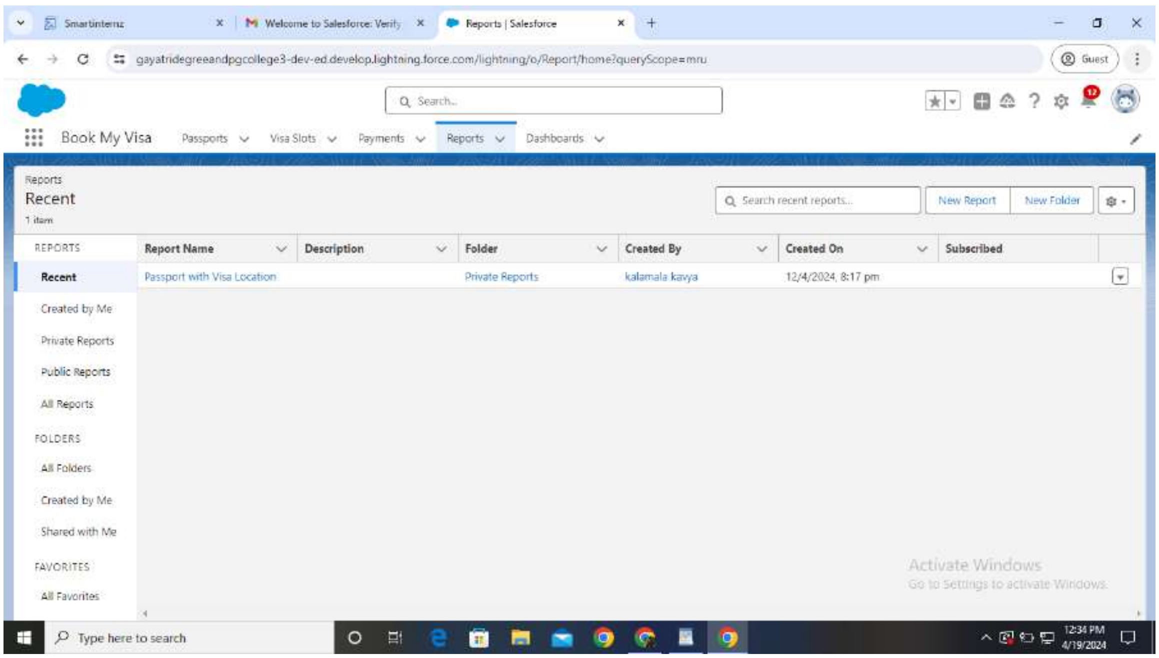
1.Click on App Launcher on left side of screen.

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



Milestone - 10 : **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

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

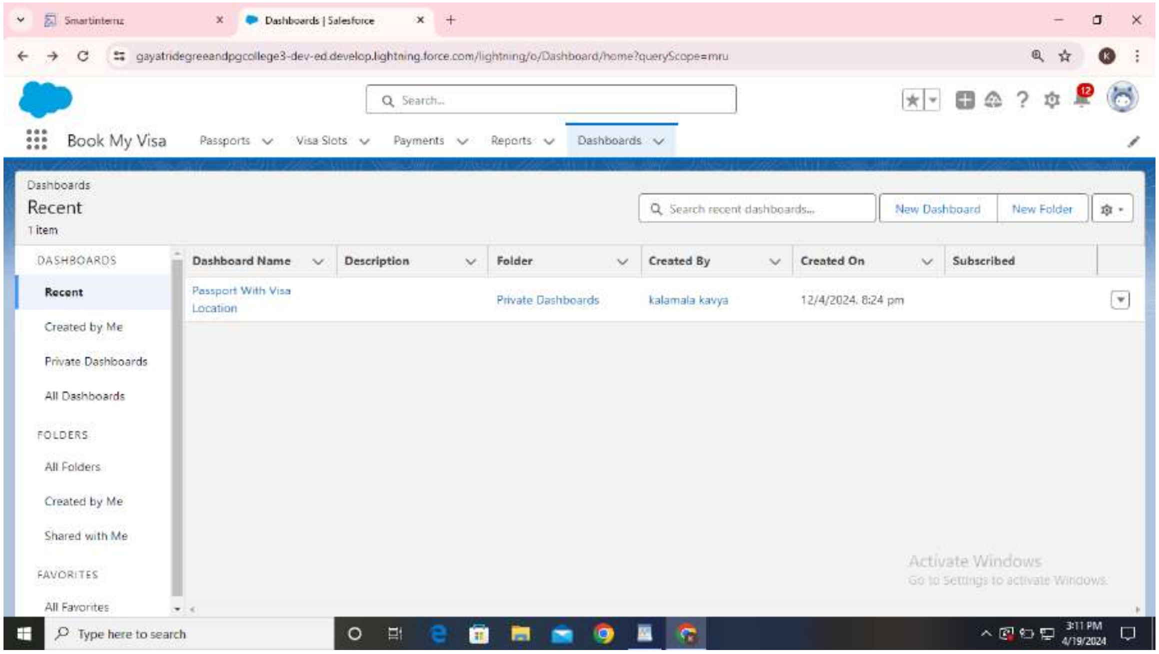
9.Value: Record count

10.Sliced By: Location

11.Leave the default values

12.Click on Add

13.Save the Dashboard and Done



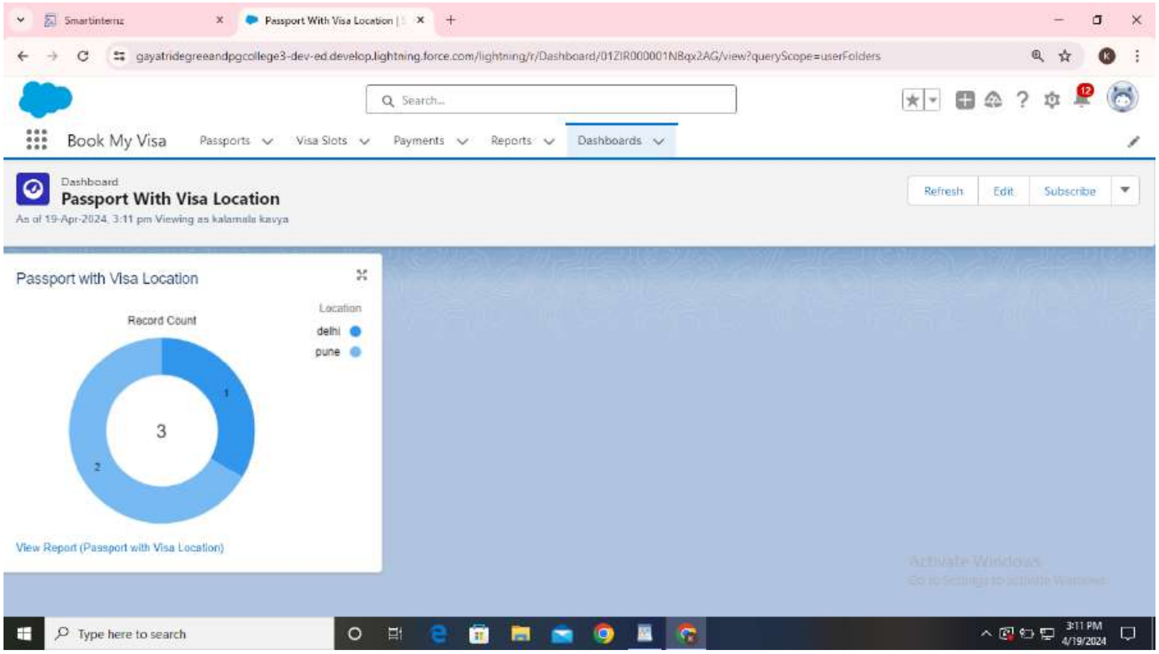
View Dashboard

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



Milestone - 11 : **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.

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.

Write A Trigger-1

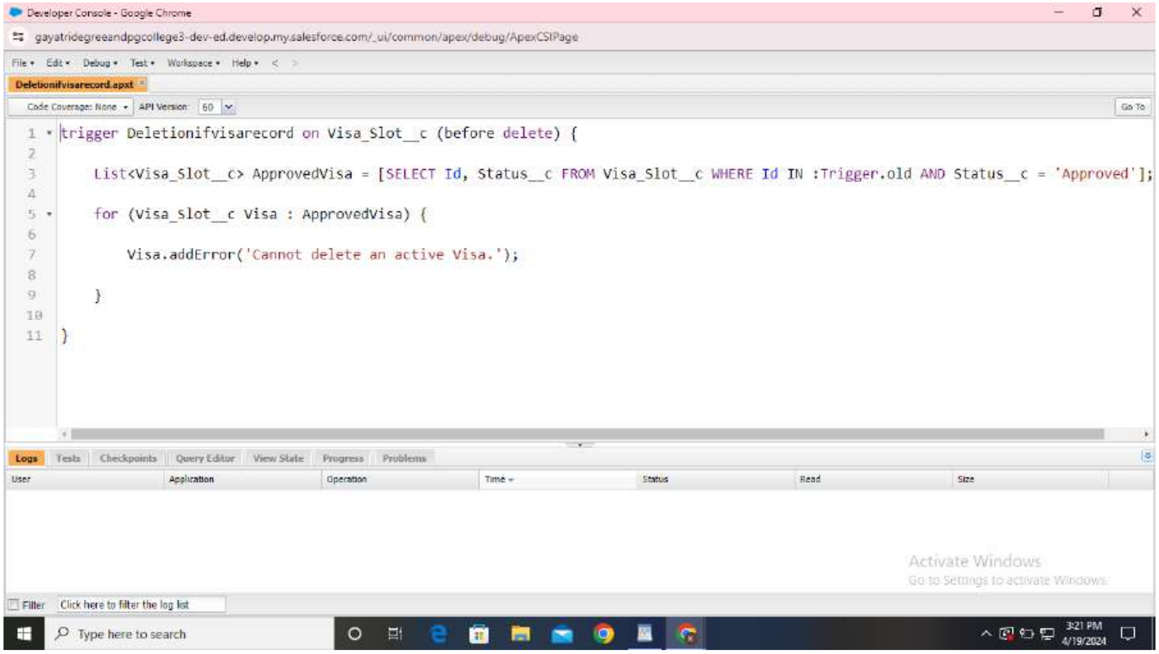
1.Click on Set up Gear at drop down list you can find developer console click on that.

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



Write A Trigger-2

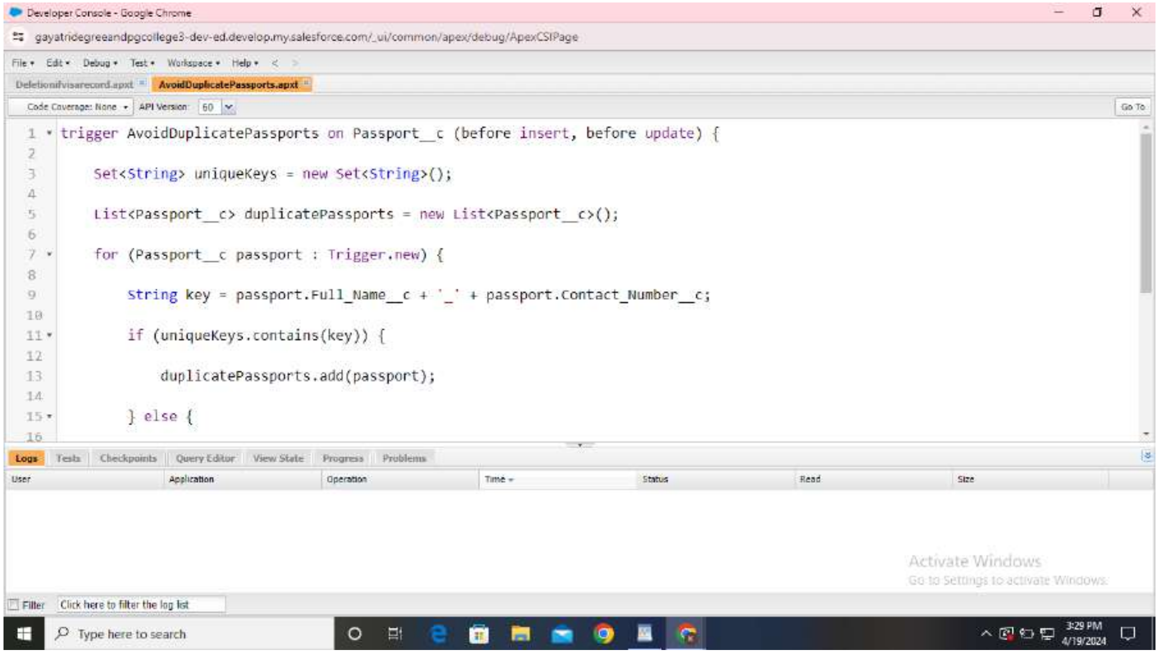
1.Click on Set up Gear at drop down list you can find developer console click on that.

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.


Developer Console - Google Chrome
gayatridegreeandpgcollege3-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
File Edit Debug Test Workspace Help
AvoidDuplicatePassports.apxt
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 {
Logs Tests Checkpoints Query Editor View State Progress Problems
User Application Operation Time Status Read Size
Activate Windows
Go to Settings to activate Windows.
Filter Click here to filter the log list
Type here to search
3:29 PM
4/19/2024

THE END