

Project Report Template

Milestone 1: Creation of developer org

1 INTRODUCTION

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

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

1.1 Overview

A brief description about your project

A visa slot management project is a system that is used to track and manage the availability of visa slots, which are appointments that are required for certain visa applications. It might be used by a government agency or a visa processing center to schedule and manage appointments with applicants.

Now we are going to prepare CRM APPLICATION THAT HELPS TO BOOK A VISA SLOT.

1.2 Purpose

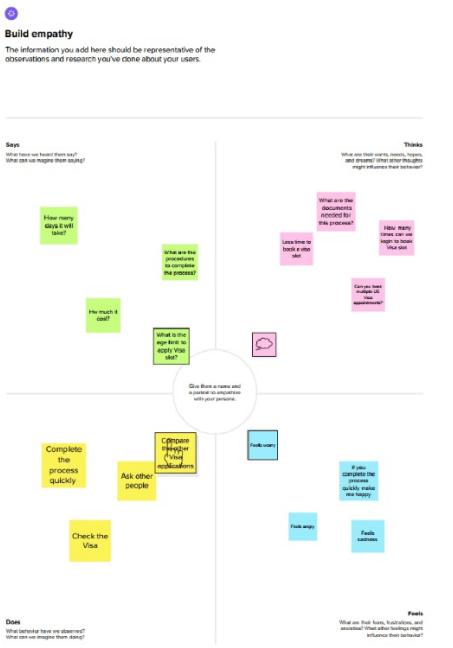
The use of this project. What can be achieved using this.

The use of this project to book a visa slot for customers. We can achieve to create a visa slot application for customers to book a visa slot.

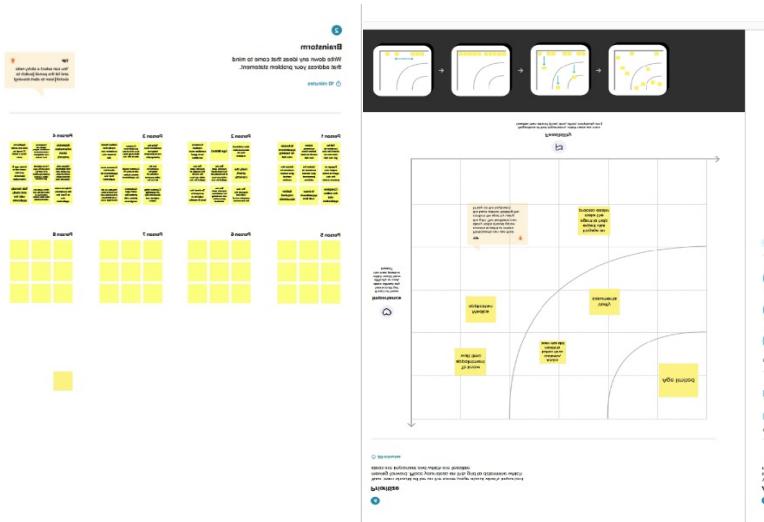
2 Problem Definition & Design Thinking

For this CRM application we created the developer account. By using this developer account now we are going to prepare CRM application to book a visa slot.

2.1 Empathy Map



2.2 Ideation & Brainstorming Map



3 RESULT

3.1 Data Model:

Objects	Passport	Visa slot	Payment	Reschedule/Cancel
Fields	Full name	Location	Payment Mode	Passport number (Master)

Fields	Passport number	Time	Card Number	Location
Fields	Contact number	Passport number (Master)	Transaction id (Auto number)	Time
Fields	Permanent address	Visa slot number	Cancel Transaction	Cancel
			Visa slot number (Master)	Status

3.2 Activity & Screenshot

Attach the screenshots of your project activity along with the description.

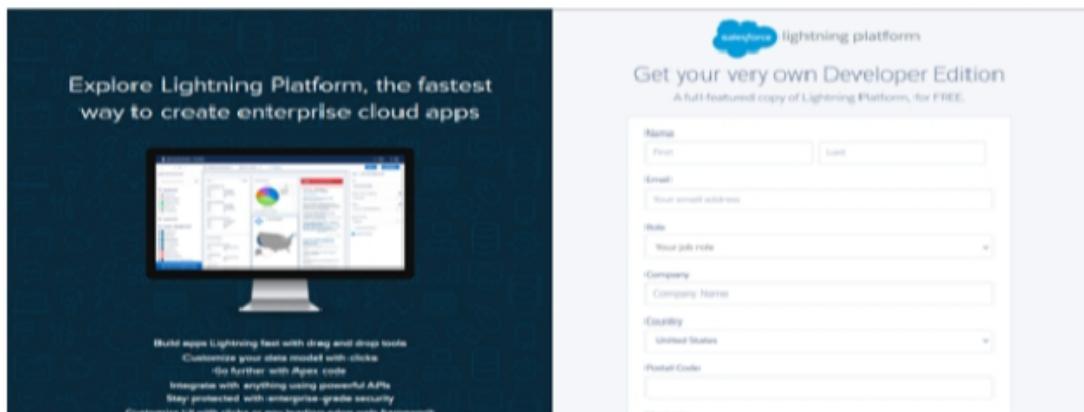
Creating Developer Account

Creating a developer org in salesforce.

1. Go to [developers.salesforce.com/](https://developer.salesforce.com/)
2. Click on sign up.
3. On the sign up form, enter the following details :

 1. First name & Last name
 2. Email
 3. Role : Developer
 4. Company : College Name
 5. County : India
 6. Postal Code : pin code

7. username : should be a combination of your name and company This need not be an actual email id, you can give anything in the format :



Account Activation

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

Inbox - sarankumar1999r@gmail.com | Inbox - sarankumar1999r@gmail.com | Inbox (1,191) - rdsmimadhu2002 | developer.salesforce.com - Yahoo Mail | Developer Portal | Salesforce Dev +

Gmail YouTube Maps

Salesforce Developers Home Documentation APIs Discover Build Connect

Missed the TDX '23 Keynote?

Good news! We've recorded the keynote and select developer sessions for your reference. Check them out anytime, anywhere.

[Watch now](#)

Latest Developer News

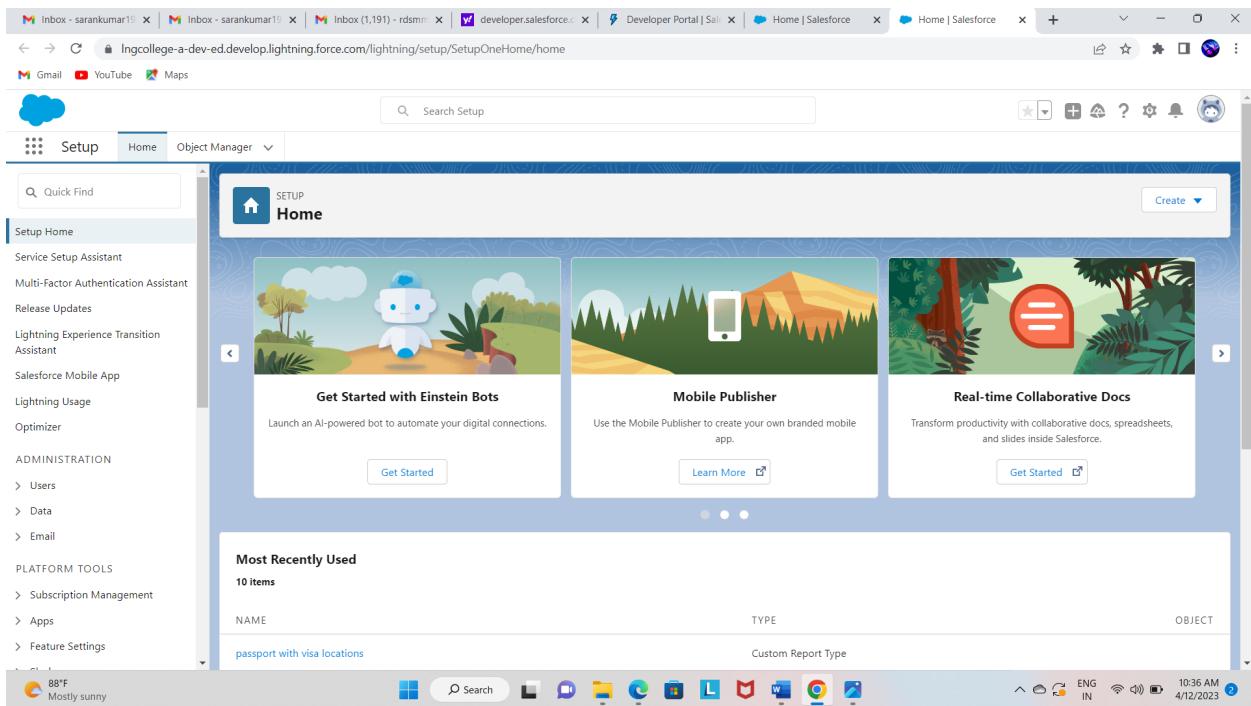
88°F Mostly sunny

Search

10:33 AM 4/12/2023

Login To Your Salesforce Account

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



Salesforce Login

<https://login.salesforce.com>

Milestone-2:

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

- 1) Standard objects.
- 2) custom objects. Objects involved in Book my visa are:

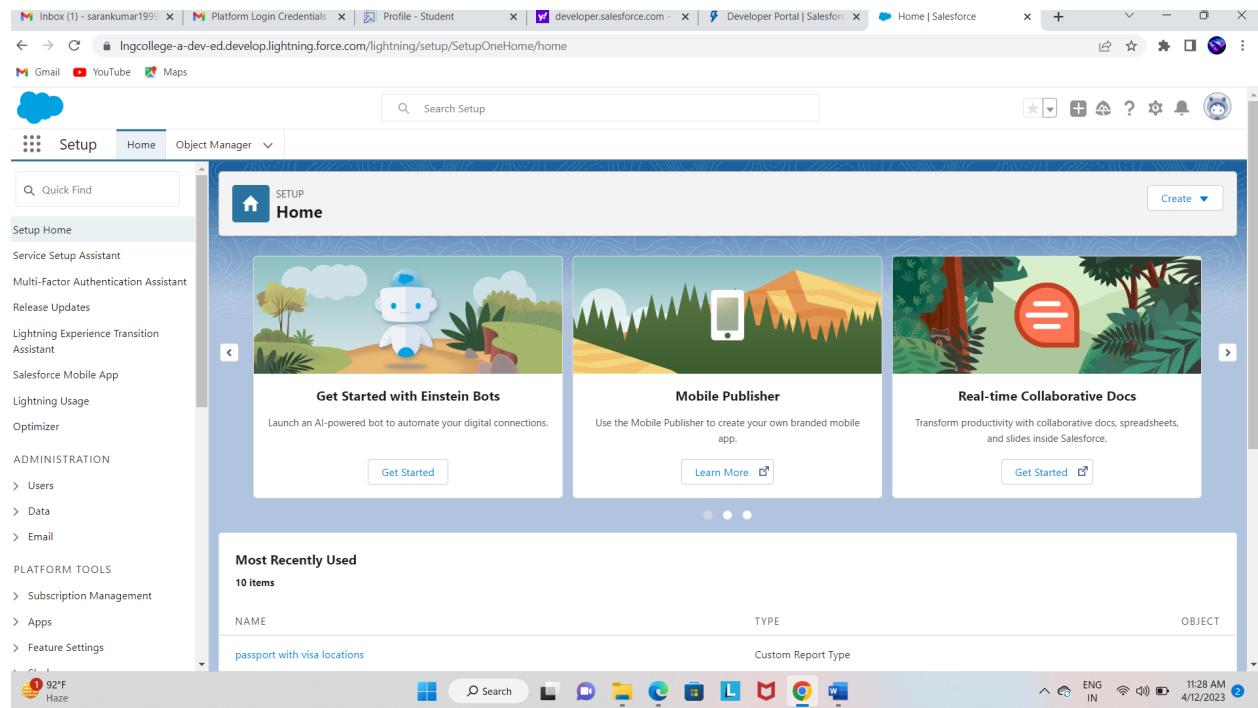
Objects	Passport	Visa slot	Payment	Reschedule/Cancel
Fields	Full name	Location	Payment mode	Passport number (master)
Fields	Passport number	Time	Card number	Location
Fields	Contact number	Passport number (master)	Transaction id (auto number)	Time
Fields	Permanent address	Visa slot number	Cancel transaction	Cancel
			Visa slot number	Status

		(master)	
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Activity-1:

Creation of custom object: Passport

- 1) Navigate to setup and select object manager.



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

The screenshot shows the Salesforce Object Manager page. At the top, there's a navigation bar with tabs like Setup, Home, and Object Manager. Below the navigation is a search bar labeled "Search Setup". The main area is titled "Object Manager" with a sub-section "SETUP". It displays a table with columns: LABEL, API NAME, TYPE, DESCRIPTION, and LAST MODIFIED. The table lists various standard objects such as Account, Activity, Alternative Payment Method, etc. A "Custom Object" button is visible in the top right corner of the table header. The status bar at the bottom shows system information like weather (92°F Haze), battery level (ENG IN), and system time (11:30 AM 4/12/2023).

3) You will navigate to custom object definition edit where you have to give the object name.

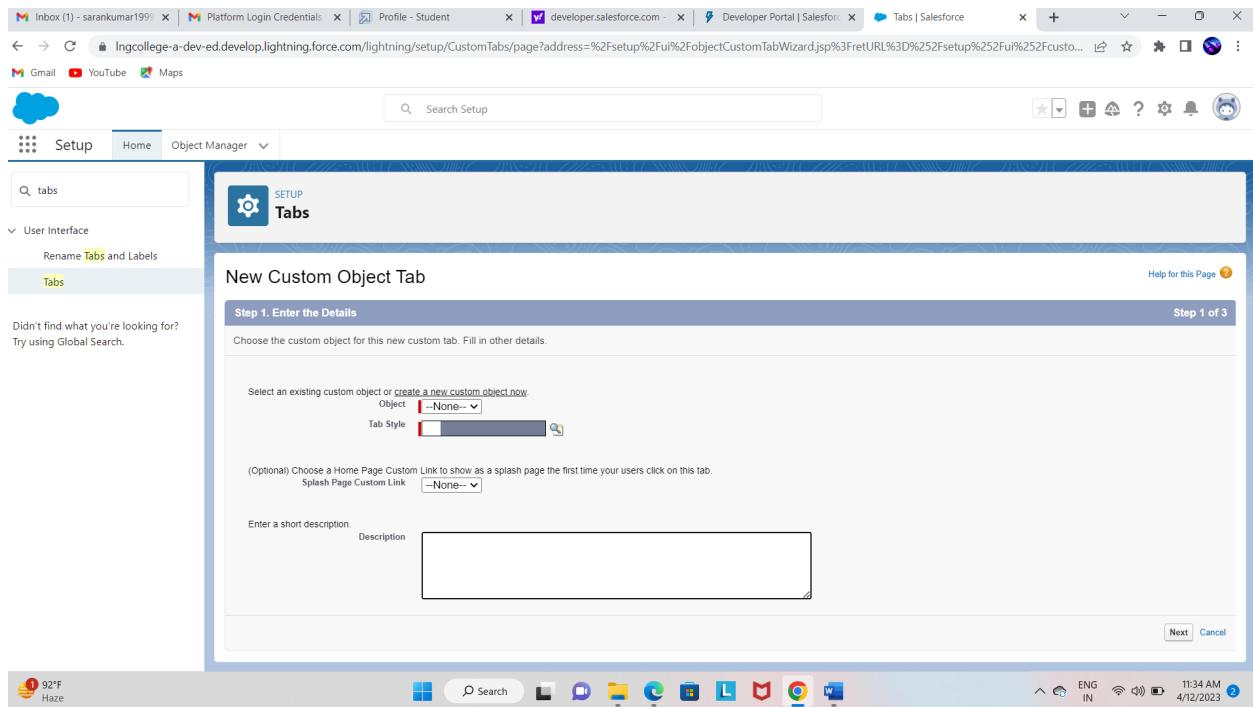
4) The label name has Passport and Plural label has Passports.

The screenshot shows the "New Custom Object" page. At the top, there's a navigation bar with tabs like Setup, Home, and Object Manager. Below the navigation is a search bar labeled "Search Setup". The main area is titled "New Custom Object". It contains a "Custom Object Definition Edit" form with several fields: "Label" (text input), "Plural Label" (text input), "Starts with vowel sound" (checkbox), "Object Name" (text input), "Description" (text area), and "Content Name" (dropdown menu). There are also "Context-Sensitive Help Setting" options and a "Save" button. The status bar at the bottom shows system information like weather (92°F Haze), battery level (ENG IN), and system time (11:31 AM 4/12/2023).

5) In enter record name label and format enter name record name has passport number

6) And the data type has text.

- 7) In deployment status select deployed option.
- 8) Ensure that you have to select at least one option in the object creation option; it is available only once when a custom object is created.
- 9) Then click on next you will navigate to the new custom object tab where you have to select tab style and click on next.



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

WE COMPLETED THIS MILESTONE BY THROUGH THIS PROJECT.

Activity-2:

Fields available on custom object: Passport

The available fields are contact number, full name, passport number, permanent address and its data types are number, text.

Creation of fields on custom Object: Passport

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

The screenshot shows the Salesforce Object Manager interface. At the top, there are several tabs: 'Inbox (1) - sarankumar1991', 'Platform Login Credentials', 'Profile - Student', 'developer.salesforce.com -', 'Developer Portal | Salesforce', and 'Object Manager | Salesforce'. Below the tabs, the URL bar shows 'https://Ingcollege-a-dev-ed.lightning.force.com/lightning/setup/ObjectManager/home'. The main header has a search bar with 'Search Setup' and a menu with icons for Home, Object Manager, and other setup options. The title 'Object Manager' is displayed above a table. The table has columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. There is one item listed: 'passport' with API name 'passport__c', Type 'Custom Object', Description 'Custom Object', Last Modified '04/04/2023', and Deployed status indicated by a checkmark.

2) And select the option fields and relationships.

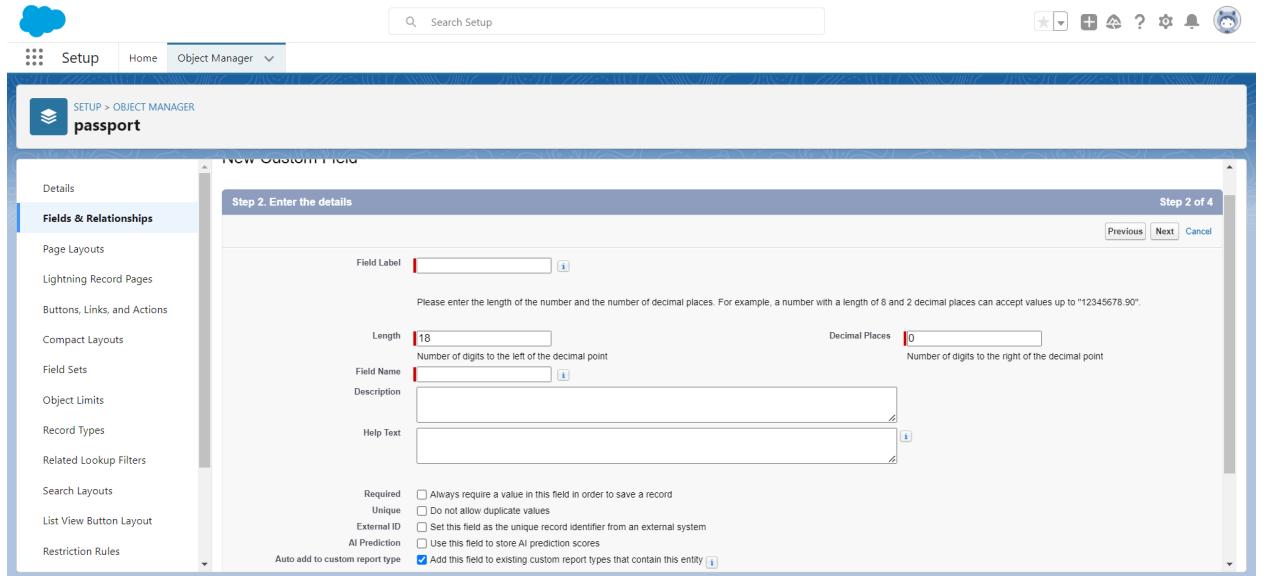
The screenshot shows the 'Fields & Relationships' section of the Object Manager for the 'passport' object. On the left, a sidebar lists various setup categories like Page Layouts, Lightning Record Pages, Buttons, etc. The main area shows a table titled 'Fields & Relationships' with 8 items. The columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data includes:

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	Number(18, 0) (External ID)		✓
permanent address	permanent_address__c	Text(10) (External ID)		✓

3) At the top right side you can find a new select that option.

4) Now you have to select data type, select number has data type.

5) And you will navigate to enter the details page where you give the field label.



- 6) And give the label name has Contact number.
- 7) And length should be 10 at the bottom of the object you can find options like required,unique, external id select required option so that always require a value in this field in order to save.
- 8) Click next you will navigate to field level security click on visible checkbox so that it is visible to all profiles.

9) Select the next option, select the page layout and save it.

We had completed this milestone by through this point.

Milestone-3: Relationship B/w Objects:

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

There are two type of relationships:

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

Activity-1:

Creation of Relationship: To create a Master Detail relationship between Passport and Visa.

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

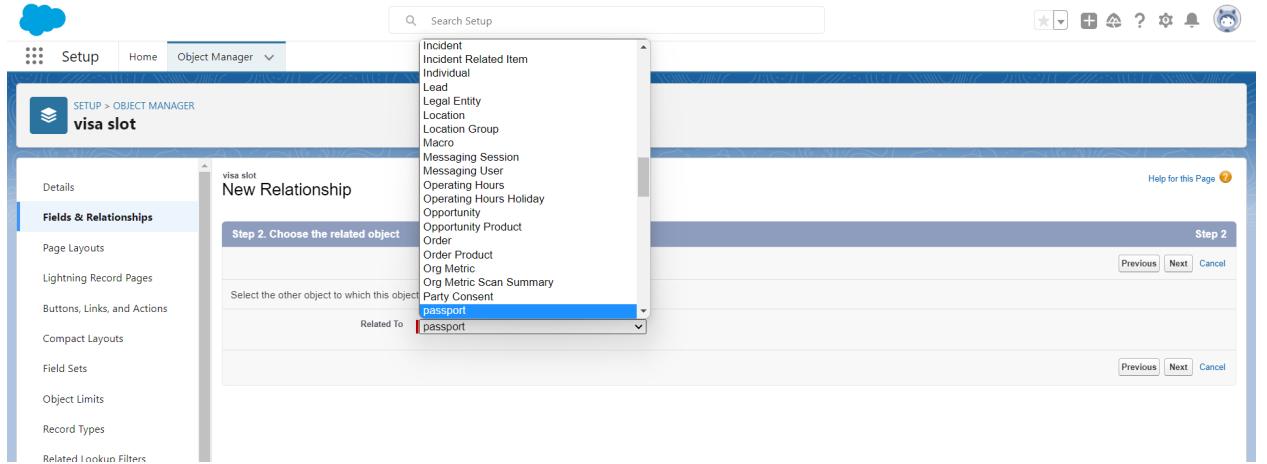
The screenshot shows the Salesforce Object Manager. At the top, there is a search bar with the text 'visa'. Below the search bar, the 'Object Manager' tab is selected. A table lists one object: 'visa slot' with API name 'visa_slot_c' and type 'Custom Object'. The table includes columns for Label, API Name, Type, Description, Last Modified, and Deployed. The 'Last Modified' column shows '07/04/2023' and the 'Deployed' column has a checkmark.

- 3) And select fields and relationships and click on new.

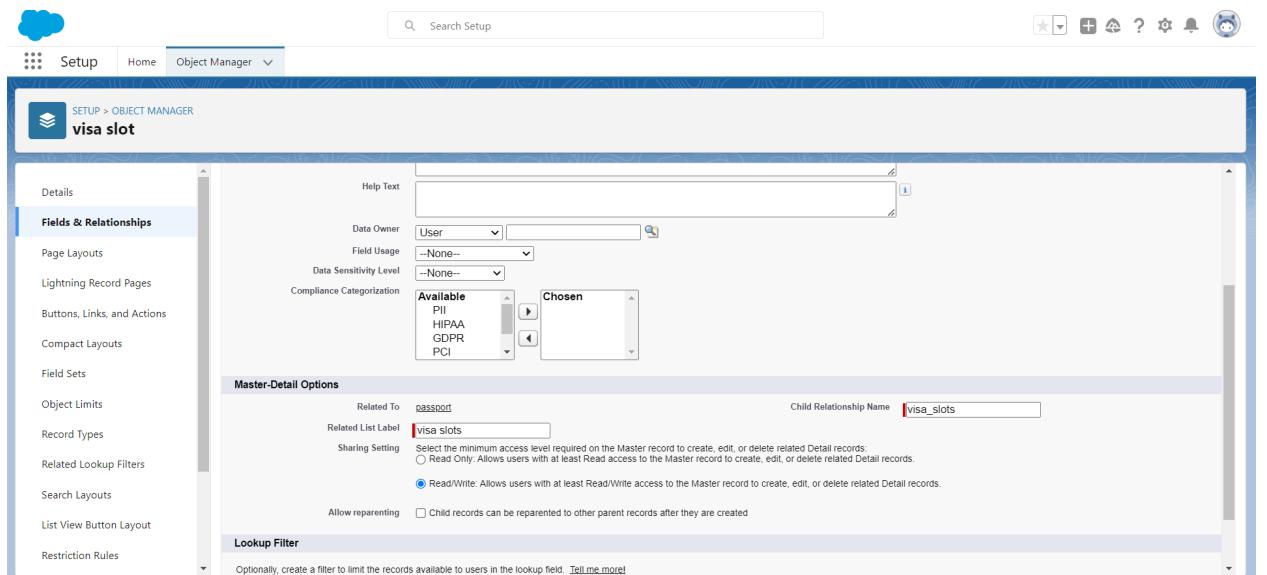
- 4) Select the data type has Master detail relationship

The screenshot shows the 'New Custom Field' setup page for the 'visa slot' object. On the left, a sidebar lists various options like Details, Fields & Relationships, Page Layouts, etc. The 'Fields & Relationships' option is selected. The main area is titled 'Step 1. Choose the field type'. It asks to specify the type of information the custom field will contain. Under 'Data Type', 'None Selected' is selected. Other options include 'Auto Number', 'Formula', 'Roll-Up Summary', 'Lookup Relationship', and 'Master-Detail Relationship'. The 'Master-Detail Relationship' option is described as creating a relationship between the object and another object, with details about ownership and deletion. There are 'Next' and 'Cancel' buttons at the bottom right.

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



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



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

We had completed this milestone by through this points.

Milestone-4

App: Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs. There are two types of Salesforce Applications:
1) Standard App 2) Custom Apps

Activity: Creation of App

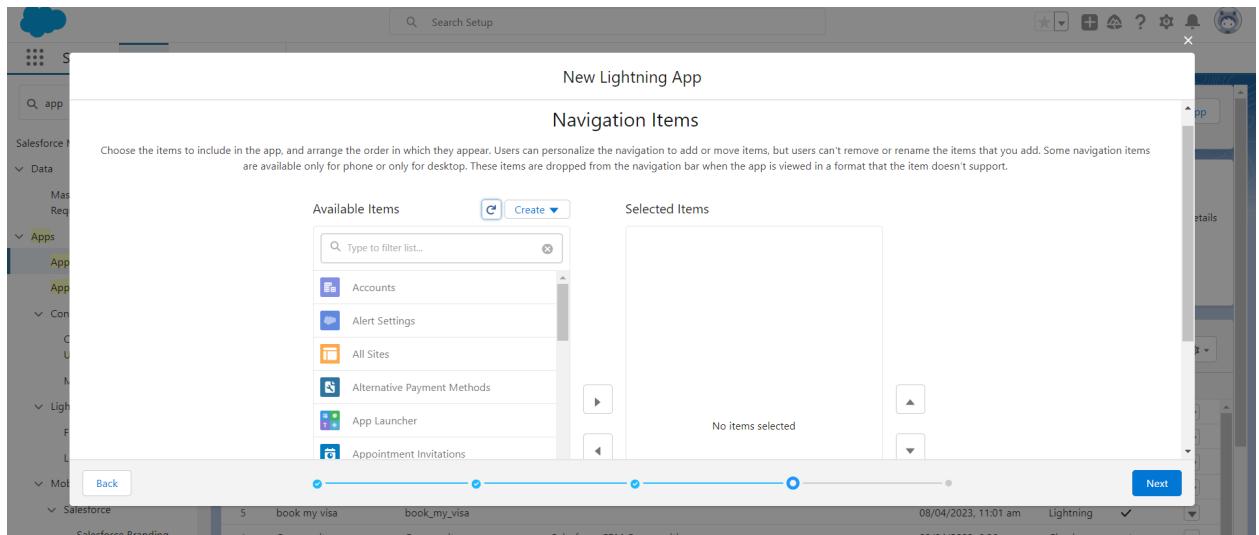
An app is a collection of items that work together to serve a particular function. Salesforce apps come in two flavors: Classic and Lightning. 1) Navigate to setup and search for app manager

App Name	Developer Name	Description	Last Modified Date	App T...	Visib...
All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	02/04/2023, 6:06 pm	Classic	✓
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	02/04/2023, 6:06 pm	Classic	✓
App Launcher	AppLauncher	App Launcher tabs	02/04/2023, 6:06 pm	Classic	✓
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	02/04/2023, 6:09 pm	Lightning	✓
book my visa	book_my_visa	Salesforce CRM Communities	08/04/2023, 11:01 am	Lightning	✓
Community	Community	Salesforce CRM Communities	02/04/2023, 6:06 pm	Classic	✓
Content	Content	Salesforce CRM Content	02/04/2023, 6:06 pm	Classic	✓

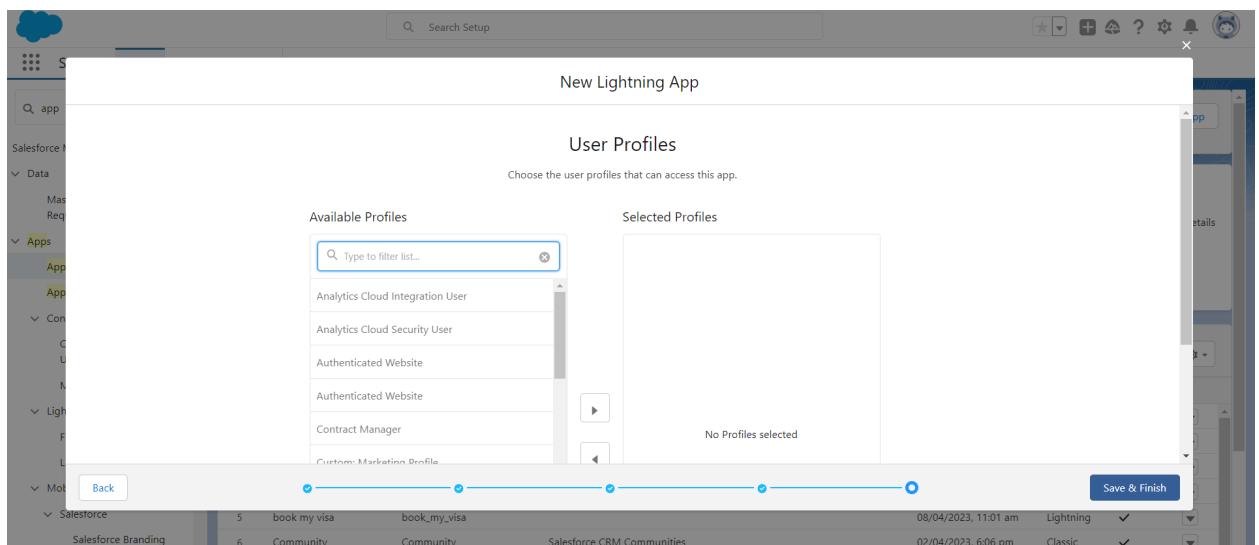
2) And select an option for a new lightning app

3) Give the app name has book my visa.

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



8) Assign system admin profile to available items to selected items.



Milestone-5

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.

Activity-1: Creation of User

- 1) Navigate to setup in quick find search bar
- 2) Type user in and select it and click on new user.
- 4) Give the first name and last name. 4) Enter your email in the email field. 5) Enter

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

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00d2w000000rxnear.5d11koexduexn@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	R. madhumitha	mR	madhumitha@ing.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	R. MADHUMITHA	mr	psammadhu2002@gmail.com		<input checked="" type="checkbox"/>	Standard User
<input type="checkbox"/>	User_ Integration	integ	integration@00d2w000000rxnear.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	Insightssecurity@00d2w000000rxnear.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

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

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

Activity-2: OWD:organization wide default settings, This can be used to give permissions to the organization wide and it can be used for restrict the access, we can control the record

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

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public Read/Write	Private	✓
Case	Public Read/Write/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
	Public Read Only	Private	✓

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

Milestone-6 Reports:

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

Activity-1:

Creation of report

Note- While creation of report ensure that update preview automatically is selected which

is available at the right side of the report page. 1) Click on the app launcher and search for reports

The screenshot shows a Salesforce report page. At the top, there's a navigation bar with links like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, and More. A search bar is also present. Below the header, the title of the report is 'Report: passports with visa slots with payments' and 'Passports with visa locations'. There's a button to 'Enable Field Editing' and other report-related buttons. The main content area displays a cactus illustration and the text 'No Results'. Below this, a message says 'No records returned. Try editing report filters.' At the bottom, there are several filter options: Row Counts, Detail Rows, Grand Total, and Stacked Summaries.

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

The screenshot shows the Salesforce app launcher. On the left, there's a sidebar with categories: Reports (Recent, 1 item), Folders (Created by Me, Private Reports, Public Reports, All Reports), and Favorites (All Favorites). The main area shows a table of recent reports. One report is listed: 'Passports with visa locations' (Report Name), 'Private Reports' (Folder), 'madhumitha R' (Created By), and '9/4/2023, 6:49 pm' (Created On). There are also buttons for 'Search recent reports...', 'New Report', 'New Folder', and a gear icon.

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

The screenshot shows a Salesforce report interface. At the top, there's a navigation bar with icons for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, and More. Below the navigation is a search bar and a toolbar with various buttons like Got Feedback?, Add Chart, Save & Run, Save, Close, and Run.

The main area is titled "REPORT" and "Passport with visa locations". It displays a table with the following data:

Location	Passport ID	a042w00000vMTBq	a042w00000vNRg3	Total
New Delhi	Record Count	1	0	1
Mumbai	Record Count	1	0	1
Chennai	Record Count	0	1	1
Hyderabad	Record Count	1	1	2
Total	Record Count	3	2	5

Below the table, there's a section titled "Details (5 Rows)" with a sub-table:

	Passport Number	Visa Slot Number
1	09rf243	V-00002
2	09rf243	V-00003
3	3536we	V-00004
4	09rf243	V-00001

At the bottom of the report interface, there are several checkboxes: Row Counts, Detail Rows, Grand Total, Stacked Summaries, and Conditional Formatting.

9) Now navigate to the filter pane available next to the outline pane and ensure in the show me section all passports is selected.

10) And in the passport created date select all time.

11) And give the label name Passports with visa locations. 12) Click on save and run for saving the report.

Milestone-7

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

Activity Creation of Dashboard

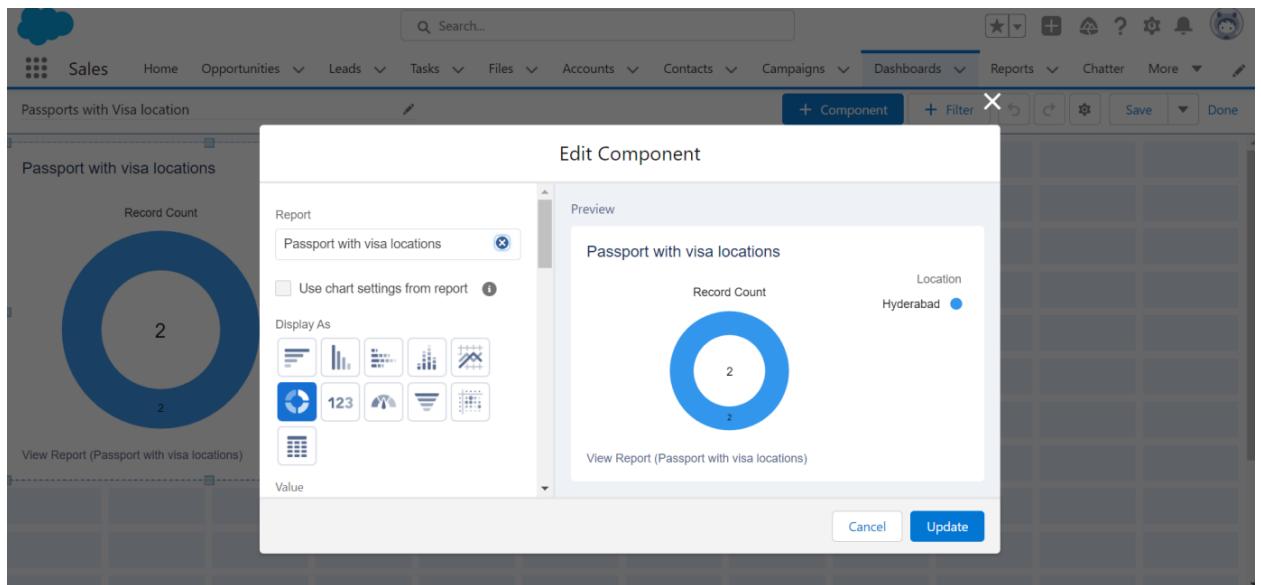
1) Click on the app launcher and search for dashboards.

The screenshot shows the Salesforce dashboard creation interface. At the top, there's a navigation bar with icons for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, and More. Below the navigation is a search bar and a toolbar with buttons for New Dashboard and New Folder.

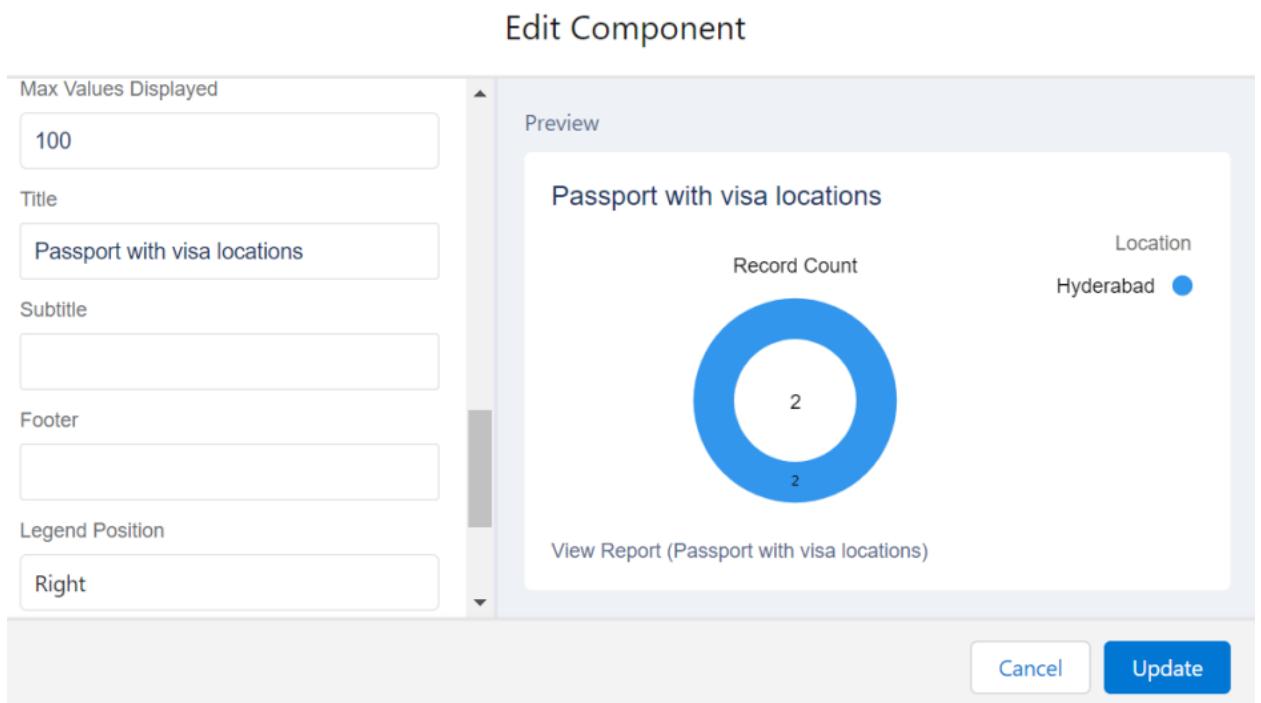
The main area shows a list of recent dashboards under the heading "Dashboards". There is one item listed: "Recent" with "1 item".

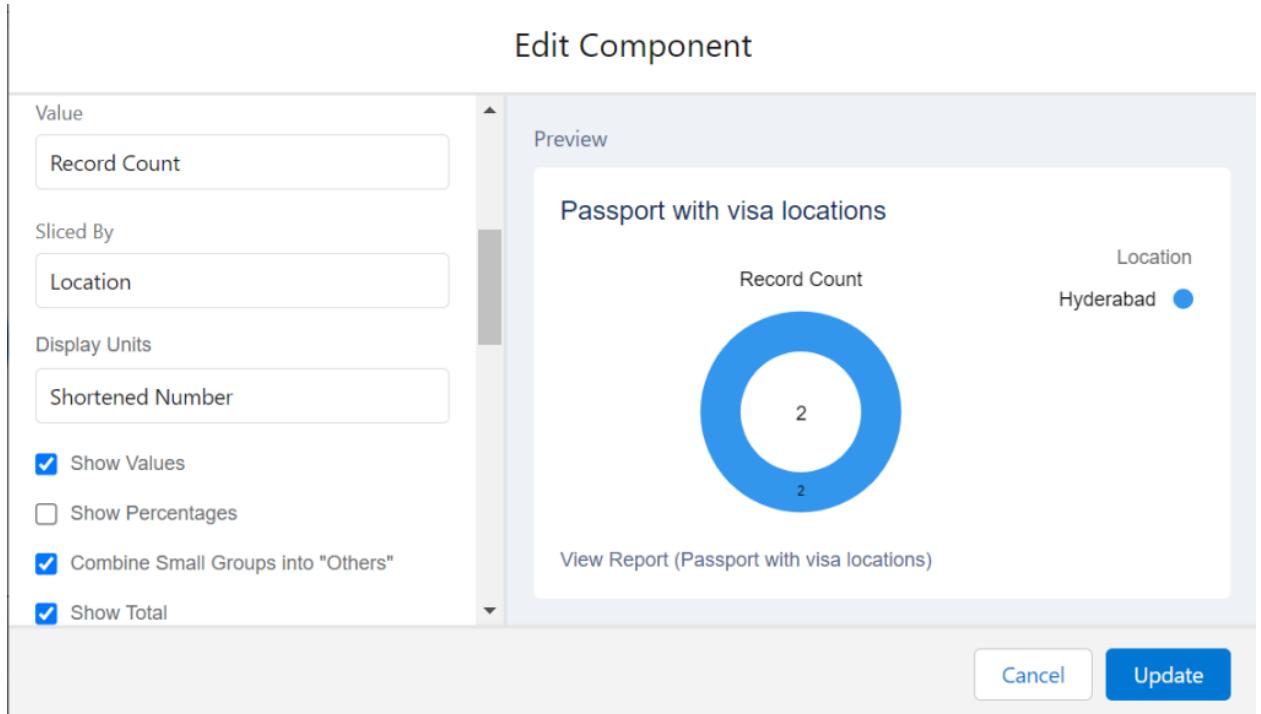
3) Select the new dashboard option.

4) Name the dashboard has a Passport with visa locations.



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





9) Leave the default values.

10) Click on add.

11) And save the dashboard

We had completed this project through this points.

4 Trailhead Profile Public URL

Team Lead- <https://trailblazer.me/id/mrajan46>

Team Member 1 - <https://trailblazer.me/id/kems-1>

Team Member 2 - <https://trailblazer.me/id/niii-bscphyem>

Team Member 3 – <https://trailblazer.me/id/ppappin>

Project Report Template

OUR PROJECT TITLE IS CRM APPLICATION THAT HELPS TO BOOK A VISA SLOT

So in this project we done CRM application for customers who book visa slot

We are using so many fields, objects,data type,app launcher,etc....

This project makes the customers feels good

We are creating report, dashboards for this project

In visa slots we created developer account

Through the developer account we logged in and created the visa slot application for customers

5 ADVANTAGES & DISADVANTAGE

List of advantages and disadvantages of the proposed solution

Advantages	Disadvantages
In this project customers easily fill the forms	Only required data are accepted
We have the report for customers	Documents should be perfectly only accepted
Customers applied this form in online also	Some errors will be come if the datas are not entered correctly

6 APPLICATIONS

The areas where this solution can be applied

- Make the customers apply in online mode
- Make the customers apply in offline mode
- For making the cutomers to go abroad countries
- Students are used this application field mostly for education field

7 CONCLUSION

Conclusion summarizing the entire work and findings.

- The conclusion of this project is we created the CRM application that helps to book a visa slot
- By using developer account we created it
- We are really enjoyed this project and created visa application for customers

8 FUTURE SCOPE

Enhancements that can be made in the future.-

- In education field students are easily access this application
- Customers accesss this application very easily
- One of the trustable application for to book a visa slot