Project Report On

CRM Application That Helps To Book A Visa Slot – Developer

Milestone -01: Creation Of Developer Org

Go to developers.salesforce.com/
   Click on sign up.
    On the sign up form, enter the following details :

1. First name & Last name – Swathi Pothuluri
2. Email – pothuluriswathi64@gmail.com
3. Role : Developer
4. Company : Gayatri Degree College
5. County : India
6. Postal Code : 517501
7. Username : swathi@gdcproject.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 5-10mins, as
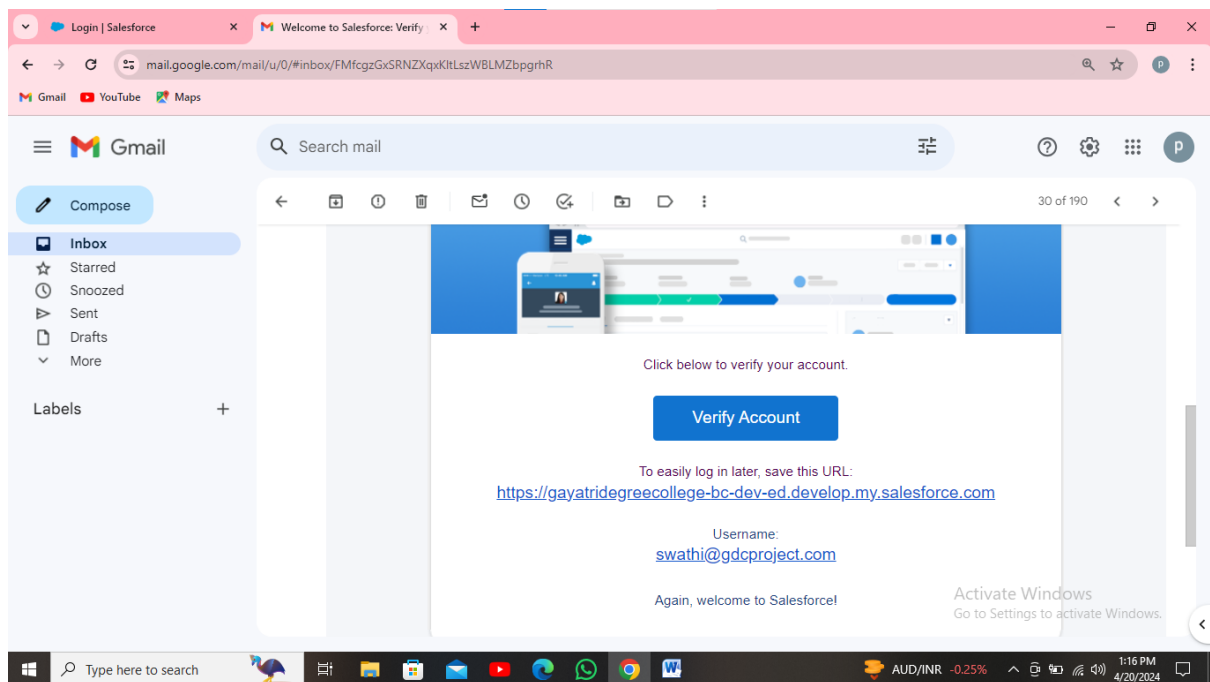
Login To Your Salesforce Account

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.
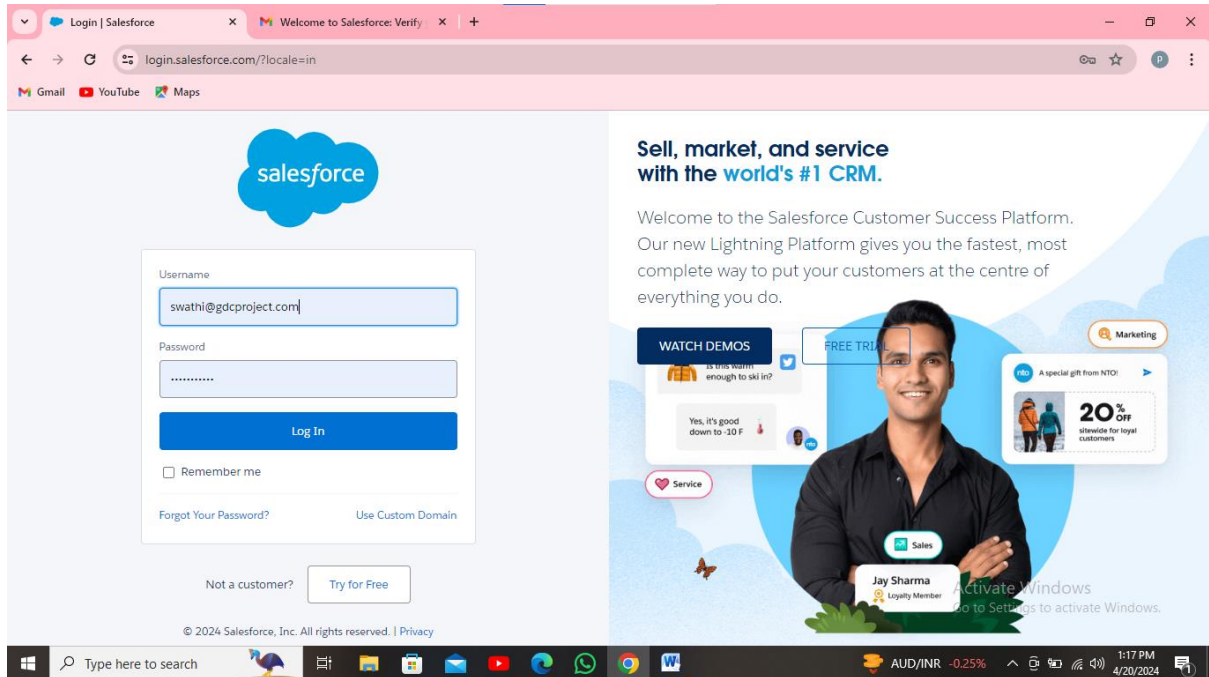
Milestone -02 : Objects Creation

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 Numbe**r
8. Check the Allow Reports checkbox
9. Check the Allow Search Checkbox
10. Click save.
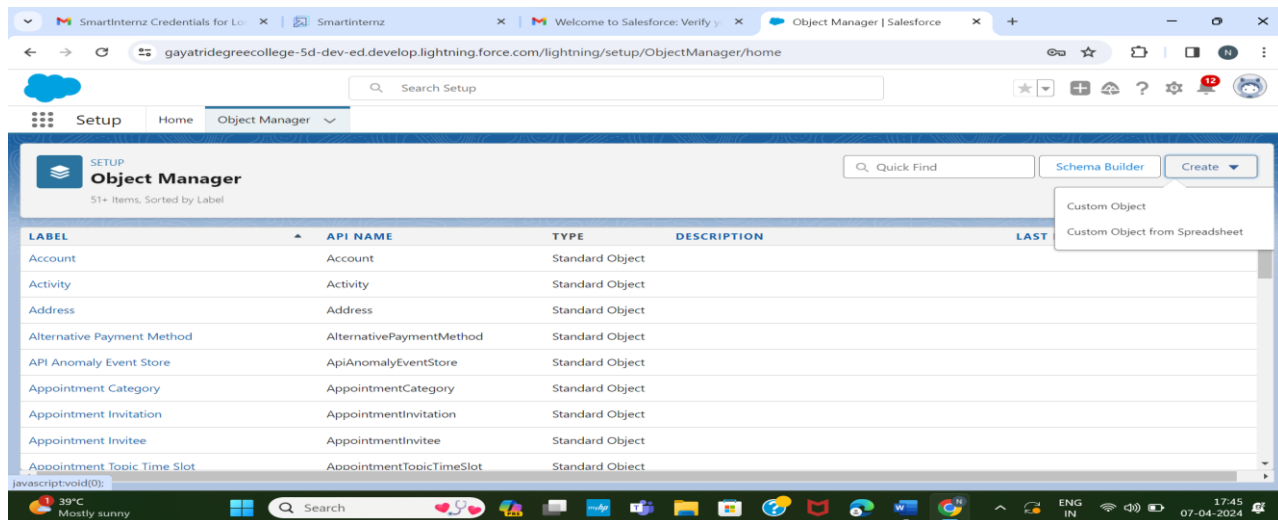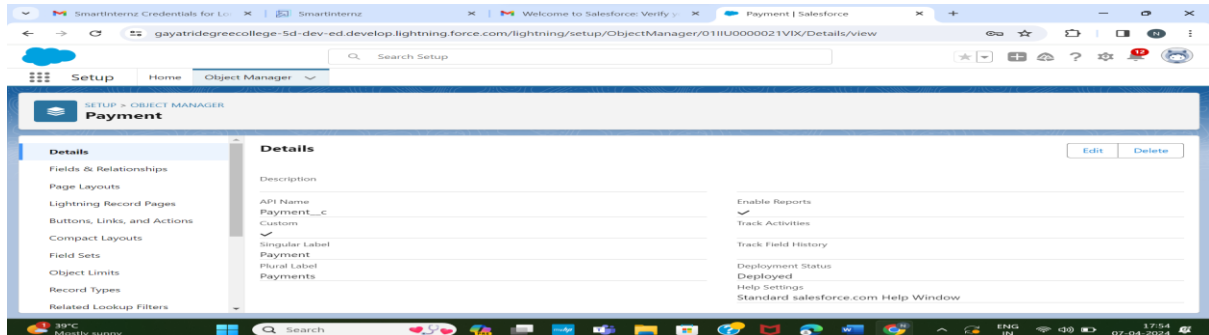
Creation Of Custom Object-Visa Slot

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
4. On the Custom Object Definition page, create the object as follows:
5. Label: **Visa Slot**
6. Plural Label: **Visa Slots**
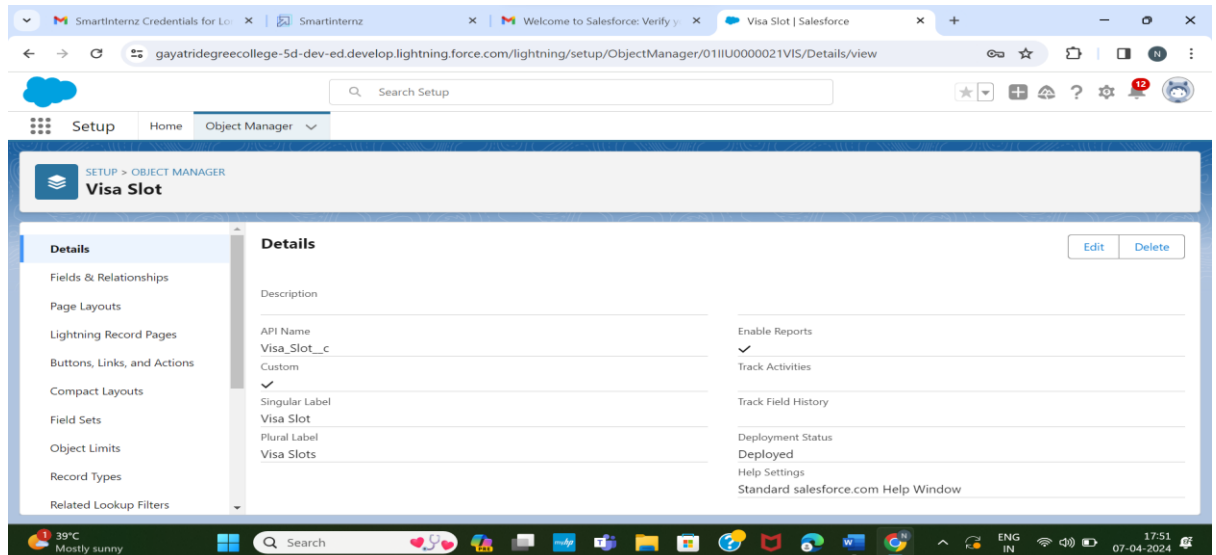
Create Of Custom Object- Payment

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
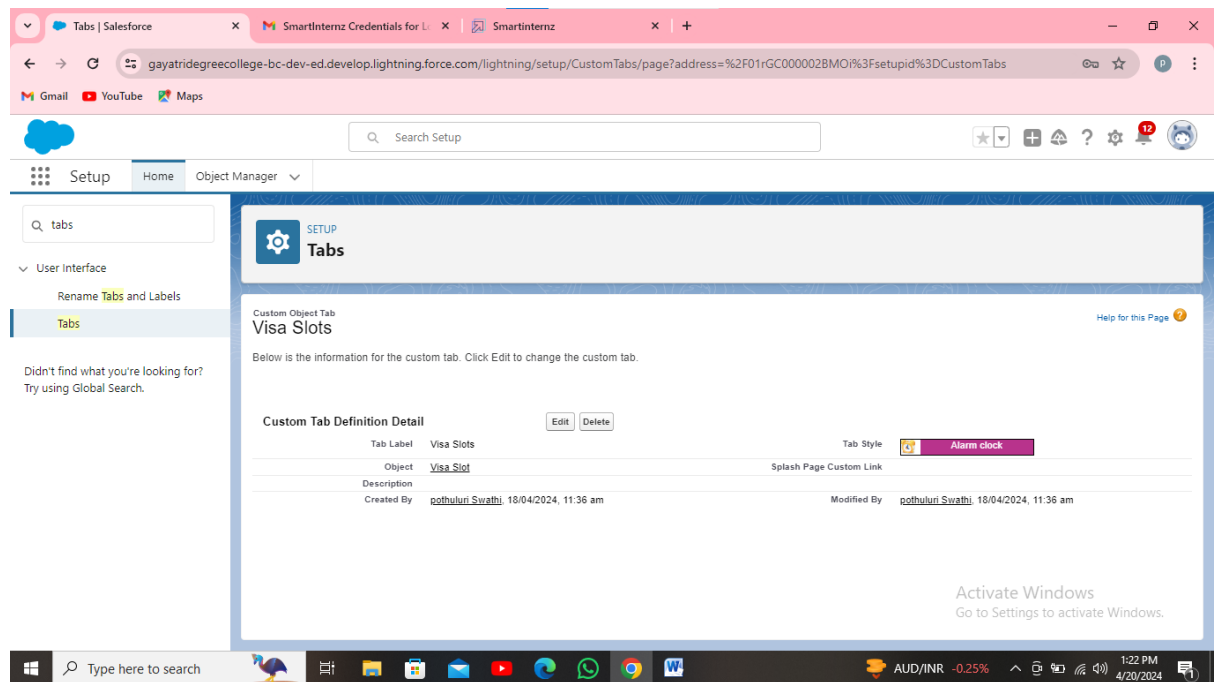10. Click Save.

Milestone – 03 :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
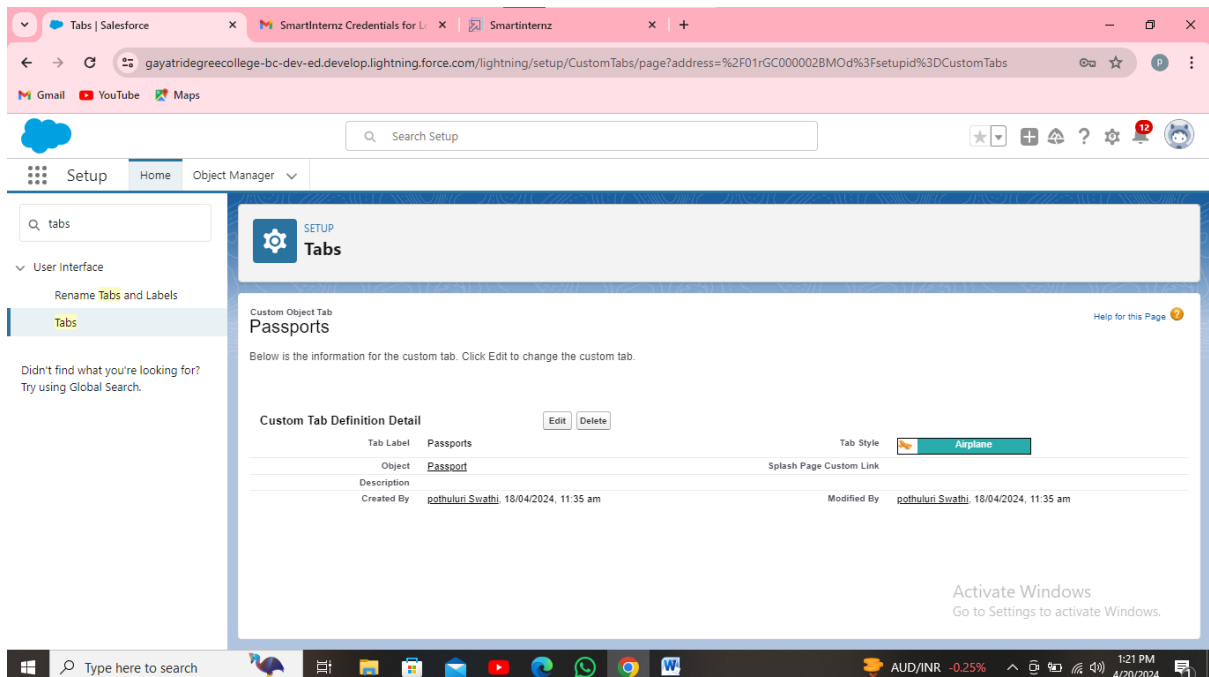
Creation Of Custom Tab- Visa Slot Object

1. Navigate to setup and enter Tabs in Quick Find and select Tabs. Under Custom Object Tabs, click New.
2. For Object, select **Visa Slot**.
3. For Tab Style, select any icon.
4. Leave all defaults as is. Click Next, Next, and Save.

# Creation Of Custom Tab- Payment Object

1. Navigate to setup and enter Tabs in Quick Find and select Tabs Under Custom Object Tabs, click New
2. For Object, select **Payment**
3. For Tab Style, select any icon
4. Leave all defaults as is. Click Next, Next, and Save
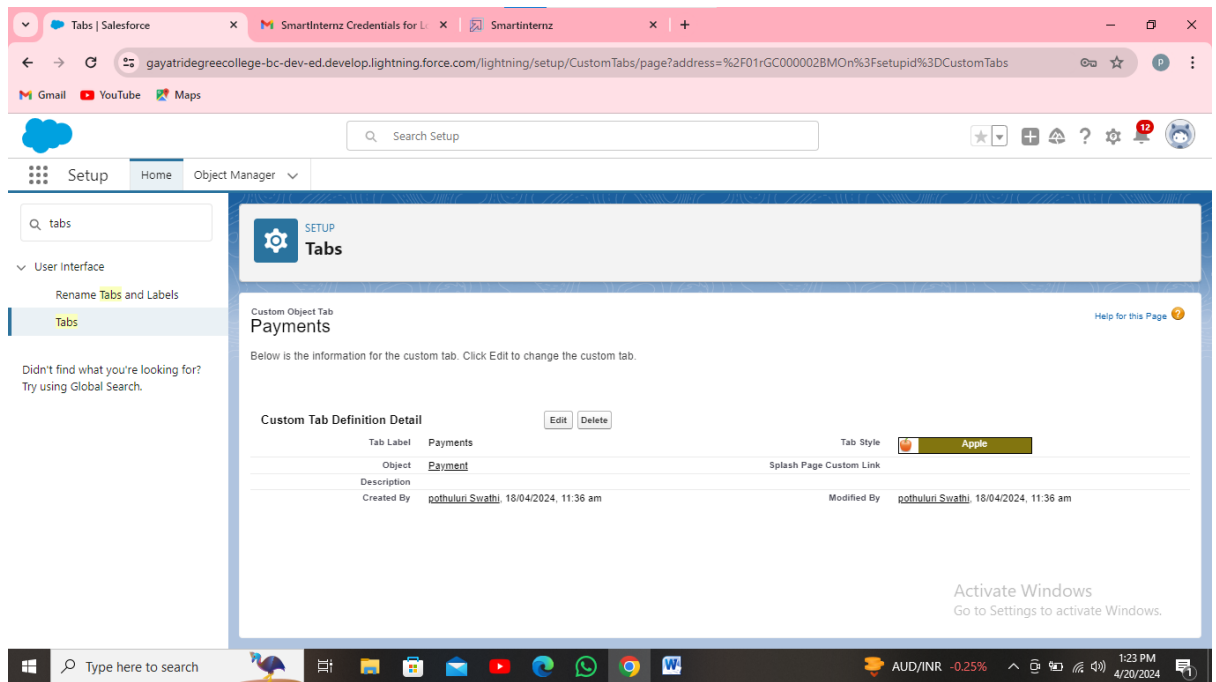
# Milestone – 04 : Relationships Between Two Objects

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.
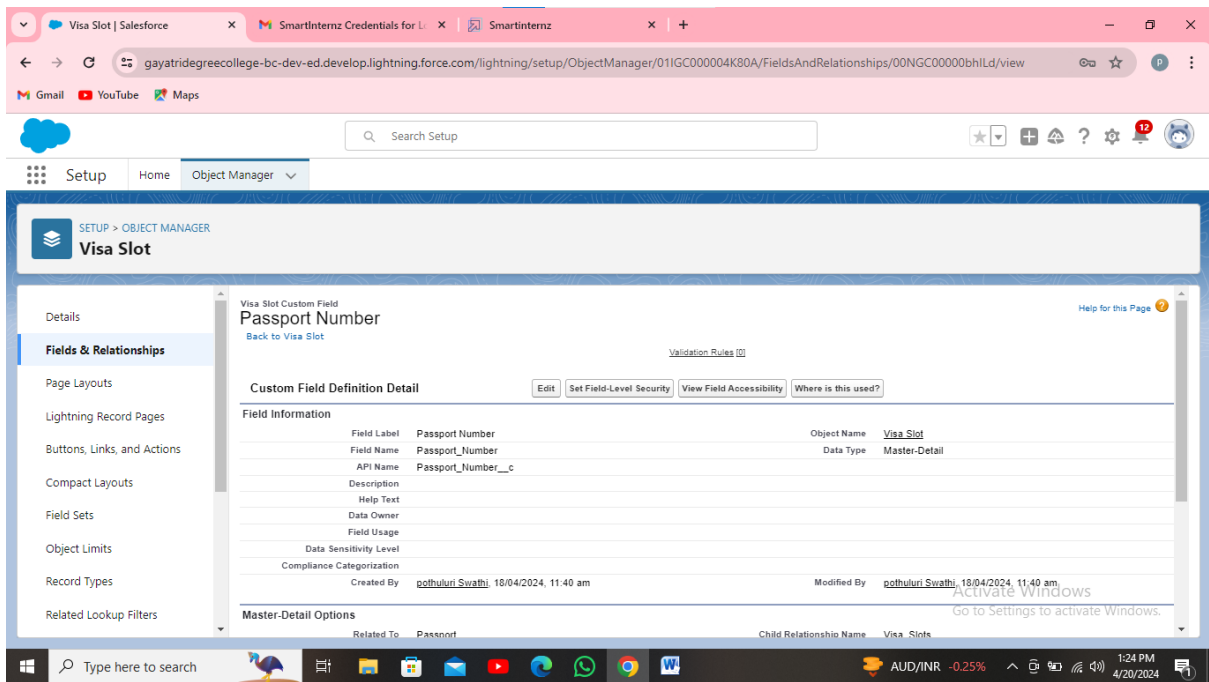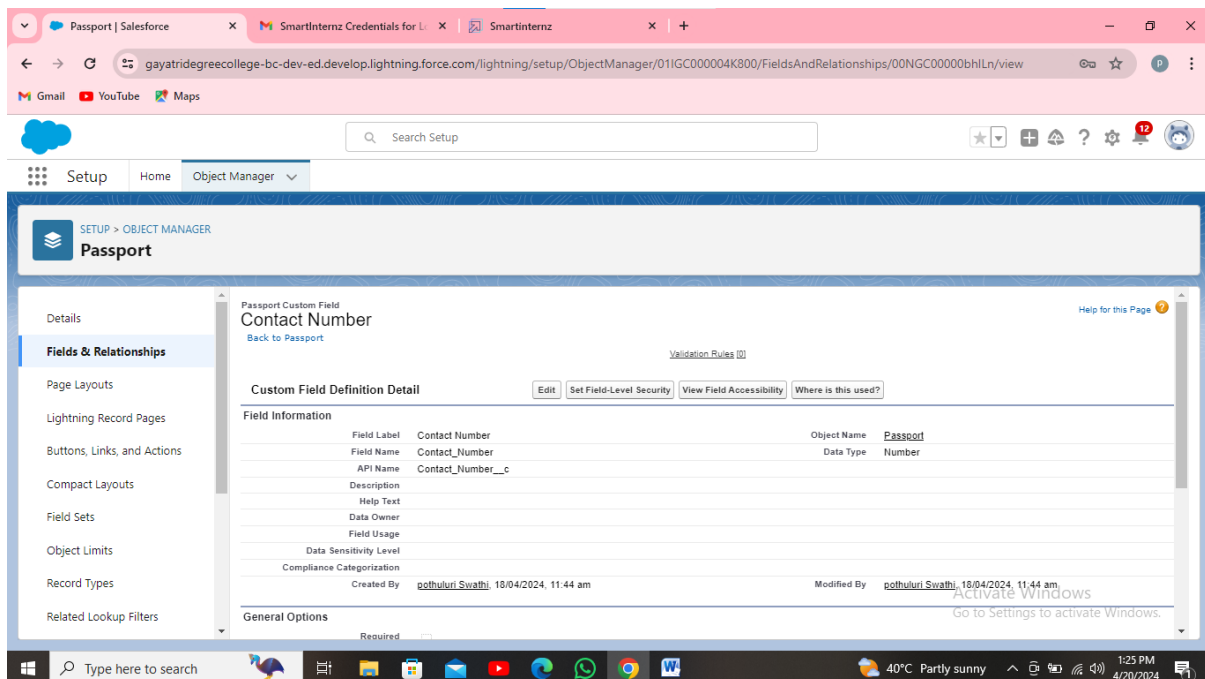
Milestone – 05 : Field Creation

Field 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)
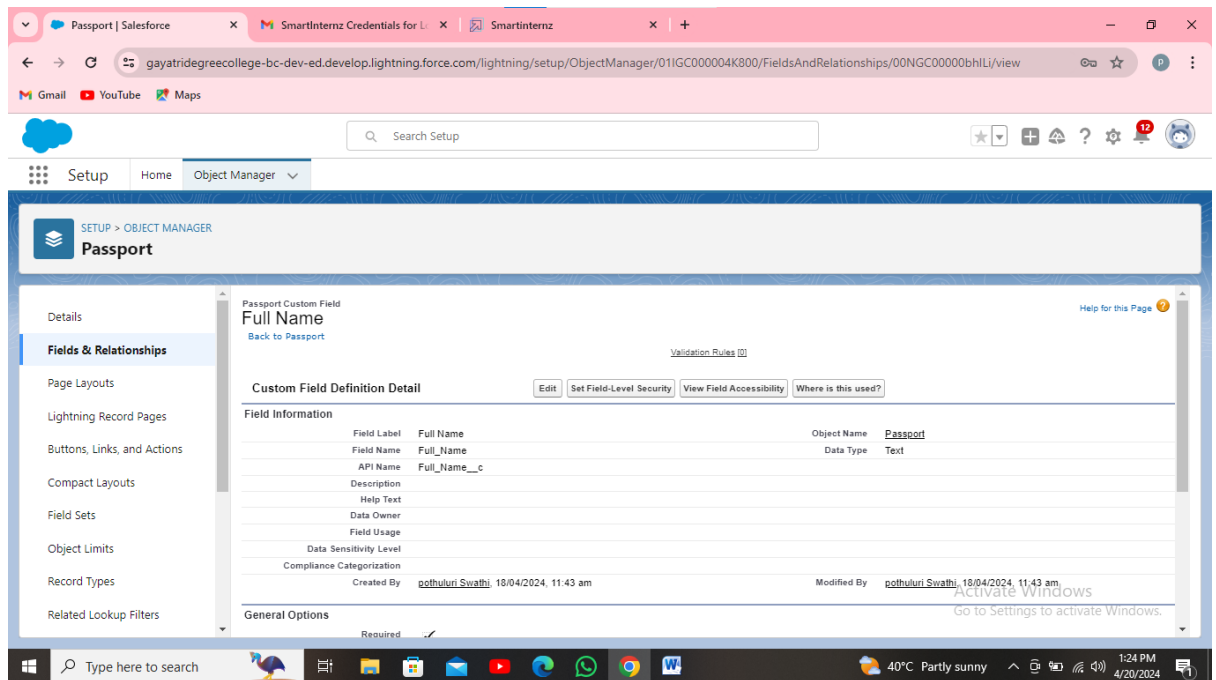
Field Creation-Contact Number

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: 10 and Decimal 0, click on next
9. Next, Save.

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
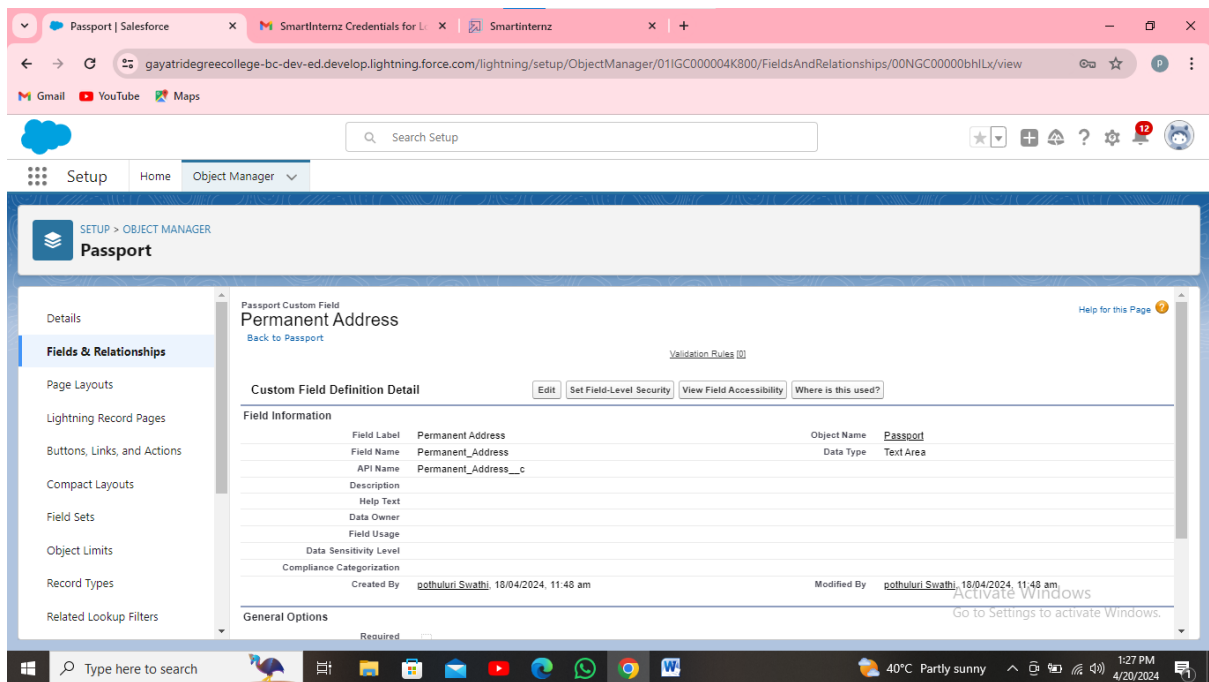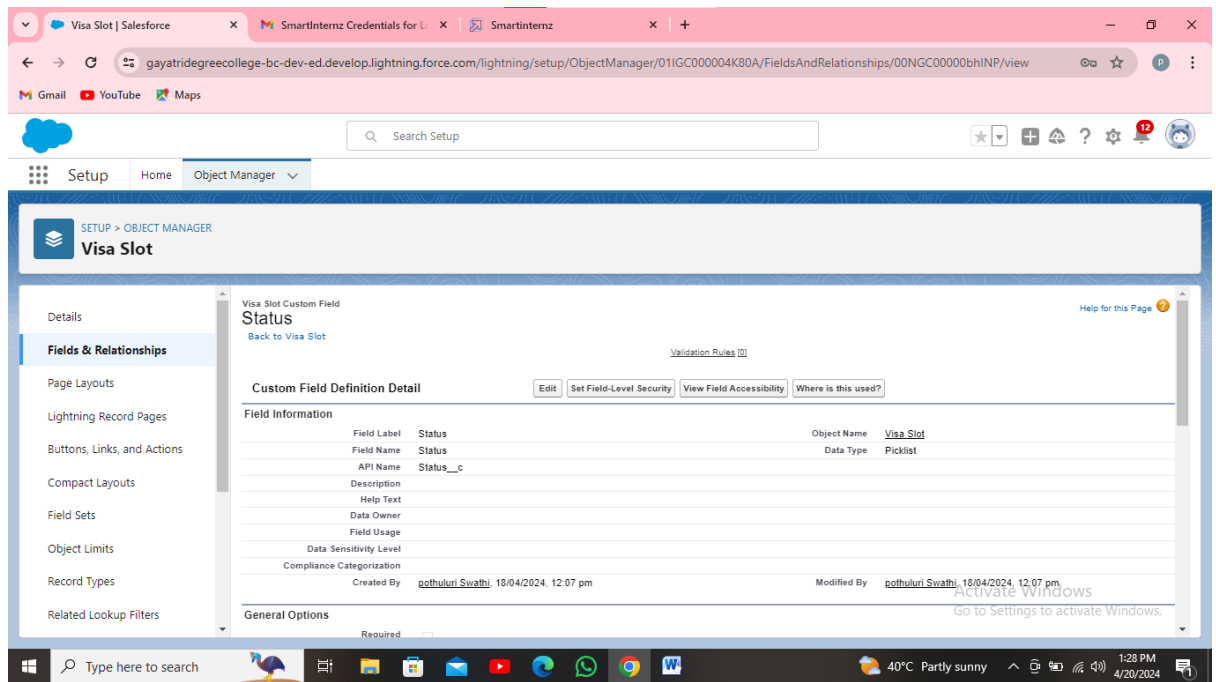

Fields Available On Custom Object: Visa

| 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
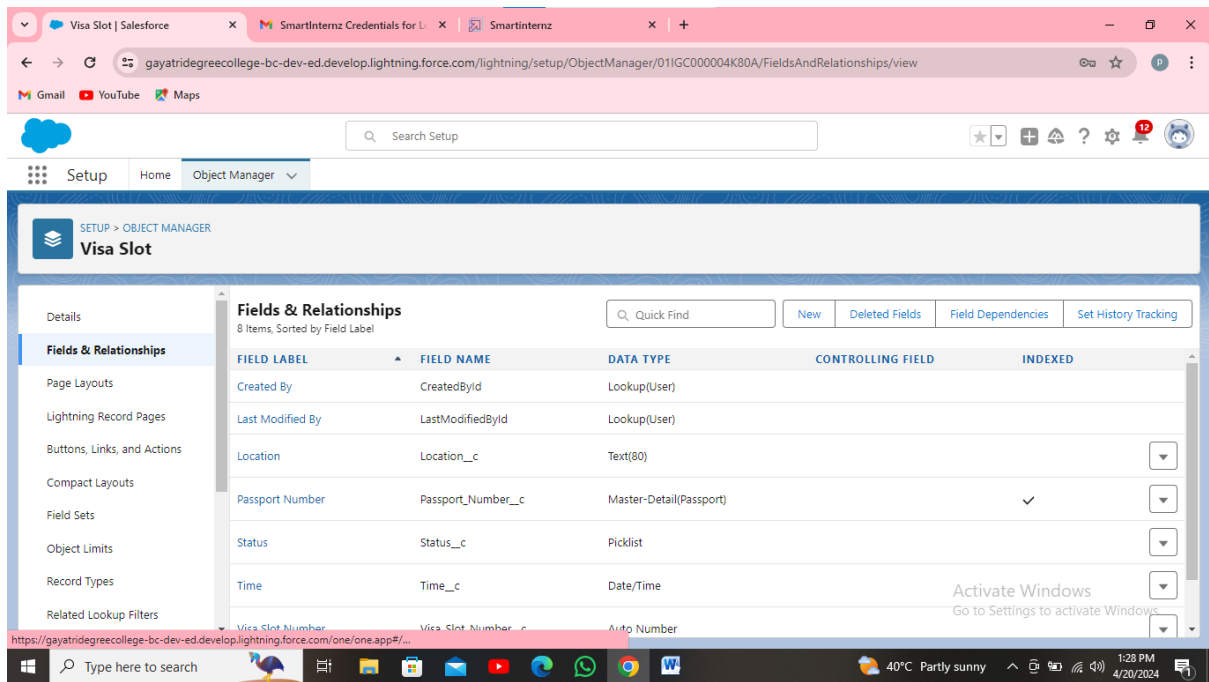
Field Creation Status

1. Click on Object Manager, search and select **Visa Slot**
2. Click Fields & Relatioships and click on new.
3. Chose on picklist, next.
4. Label: Status
5. NOTE- select enter value, with each value separated by new line
6. Values: Approved
7. Cancel Reschedule
8. Next, next and save.

Field 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
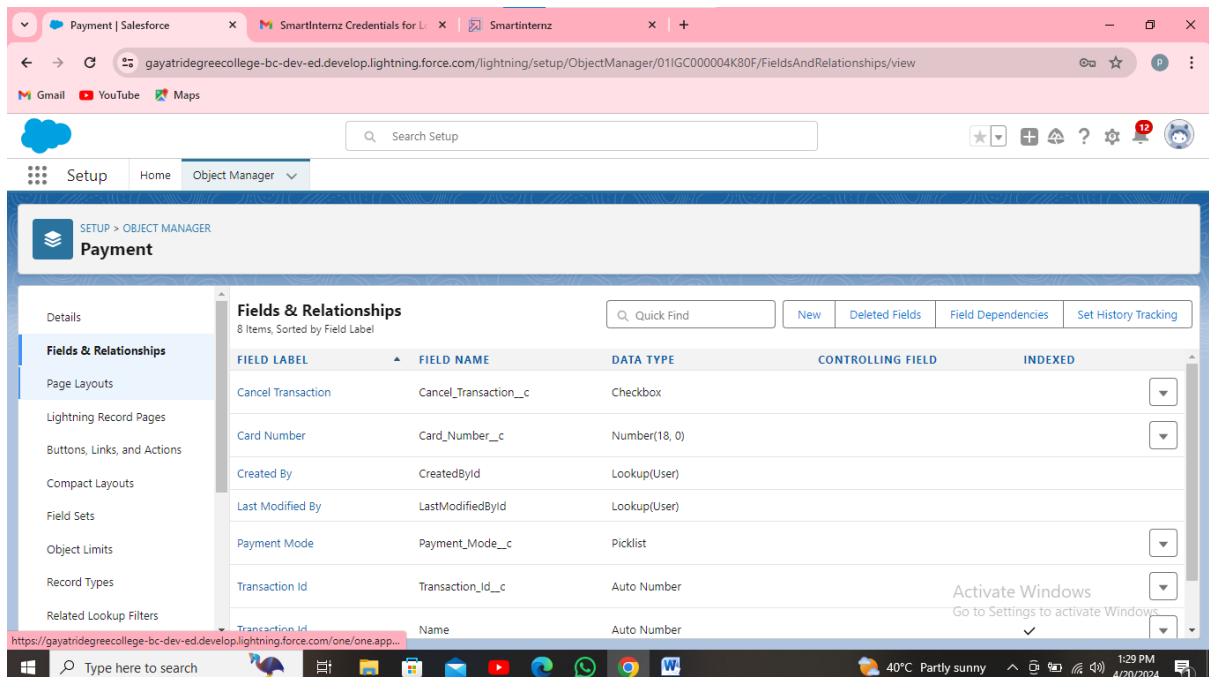
Milestone – 06 : Apps

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
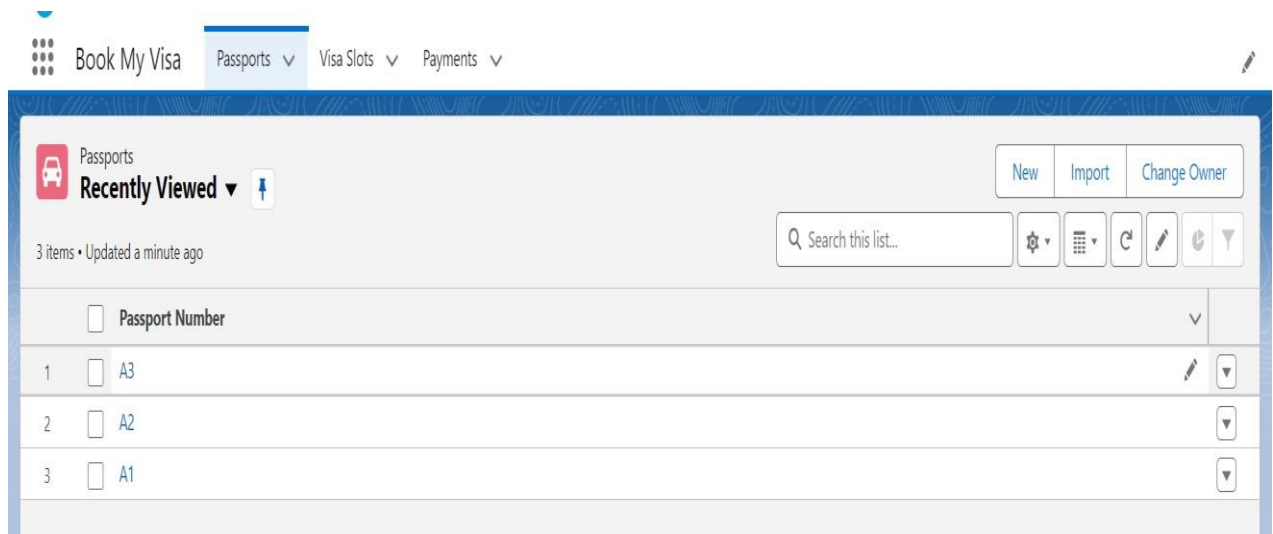
Milestone – 07 : User

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
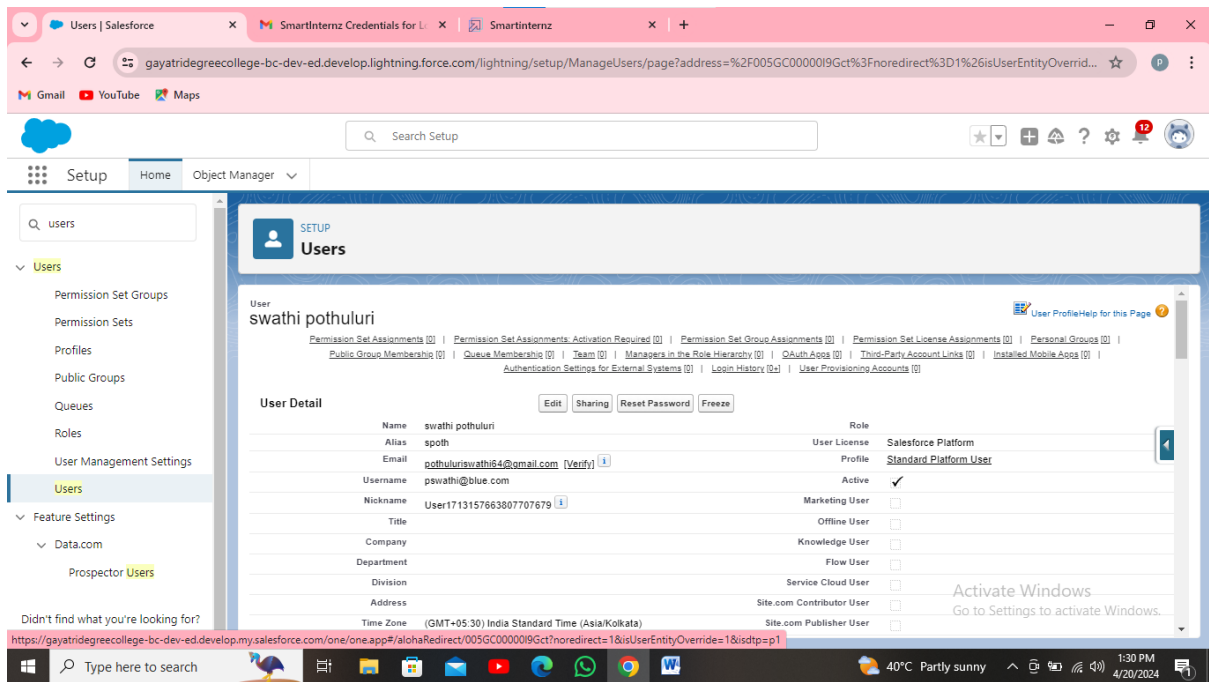
Organization Wide Defaults Settings

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.
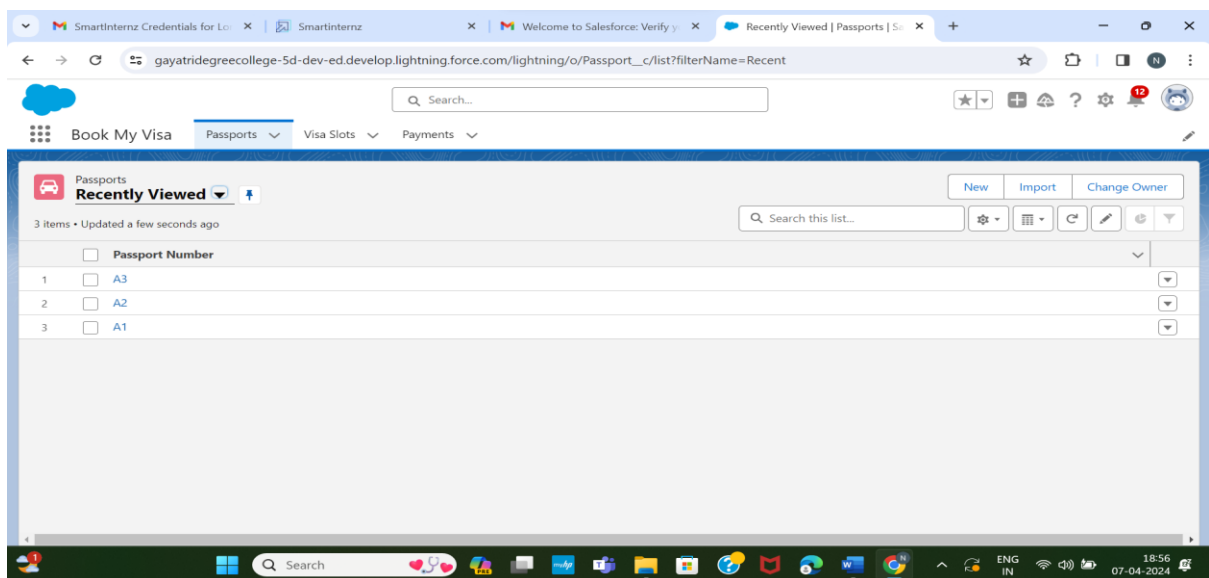6. Save.
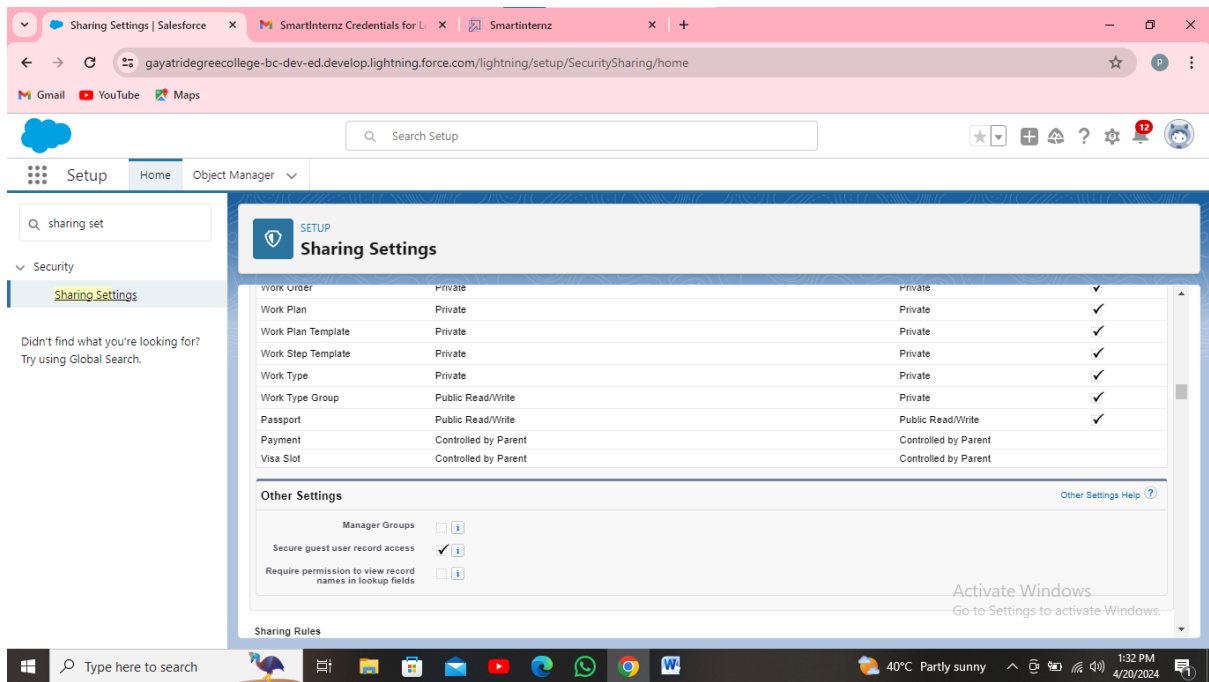
Milestone – 08 : User Adoption

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.
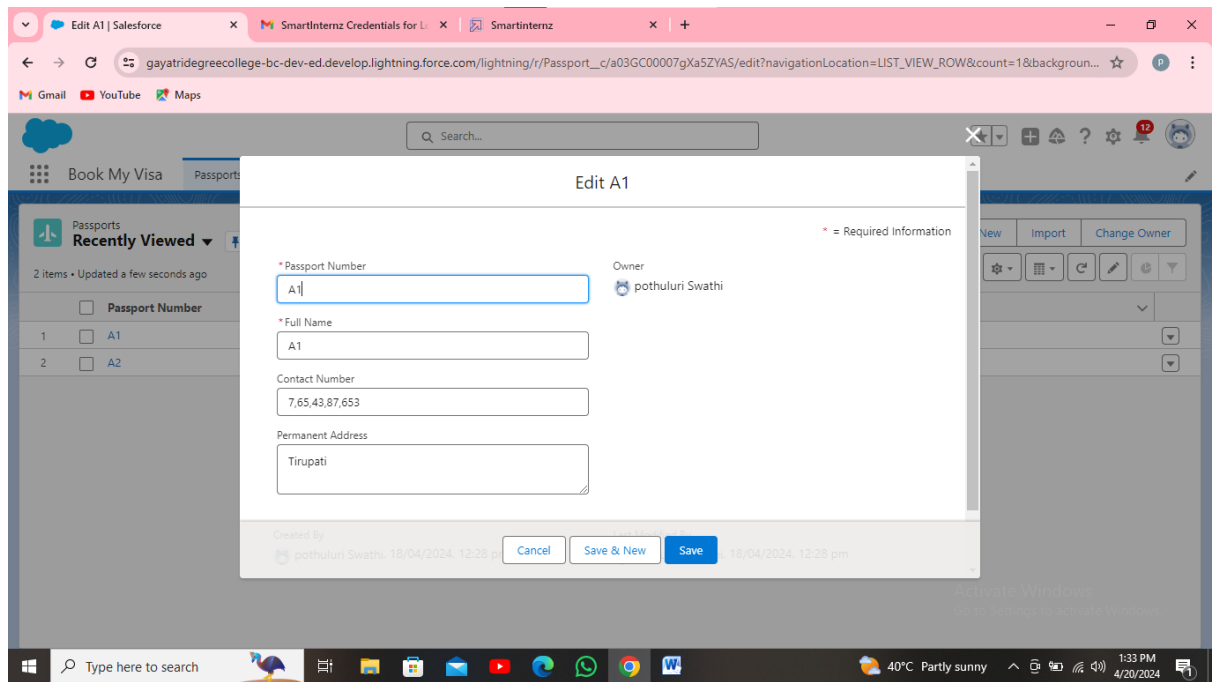
View Record- Passport

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

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.
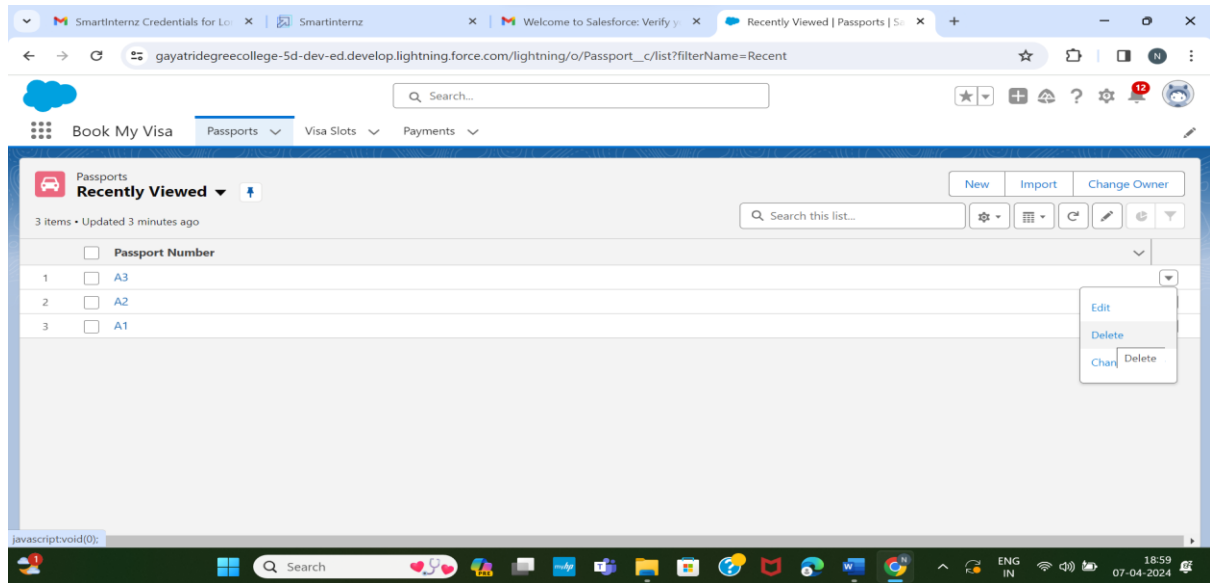
Milestone – 09 : What Are Reports?

Creation Of Report

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

Milestone – 10 : Dashboard

Creation Of Dashboards

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
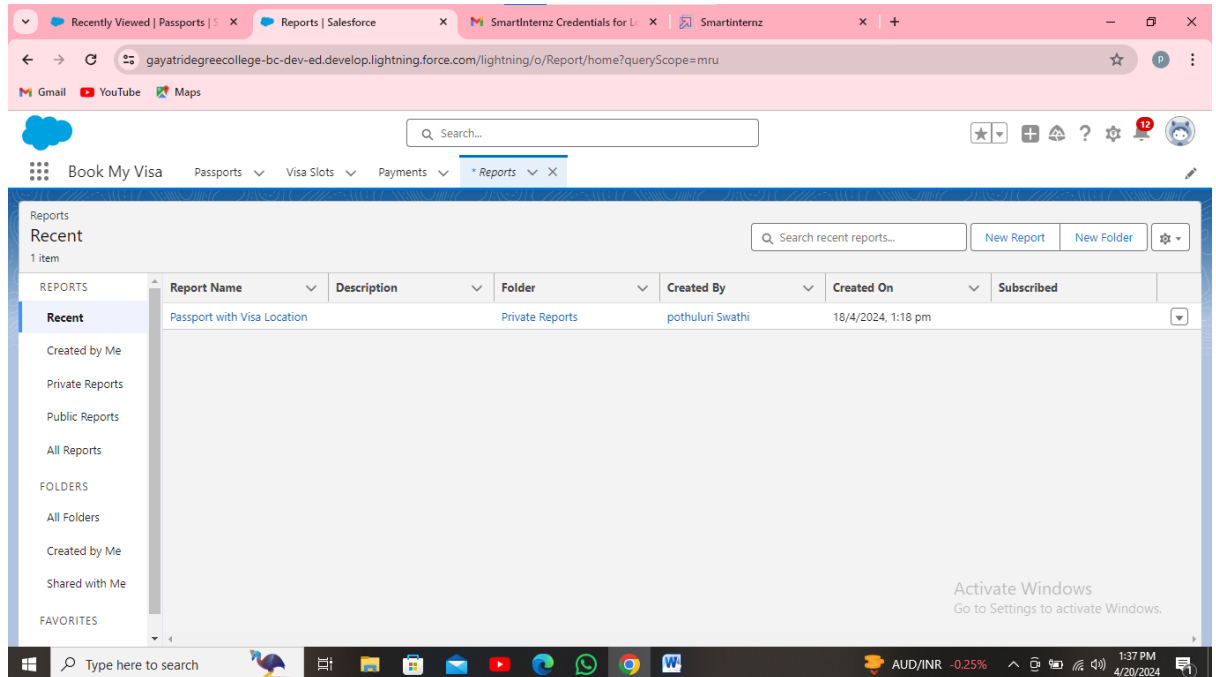13. Save the Dashboard and Done.

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
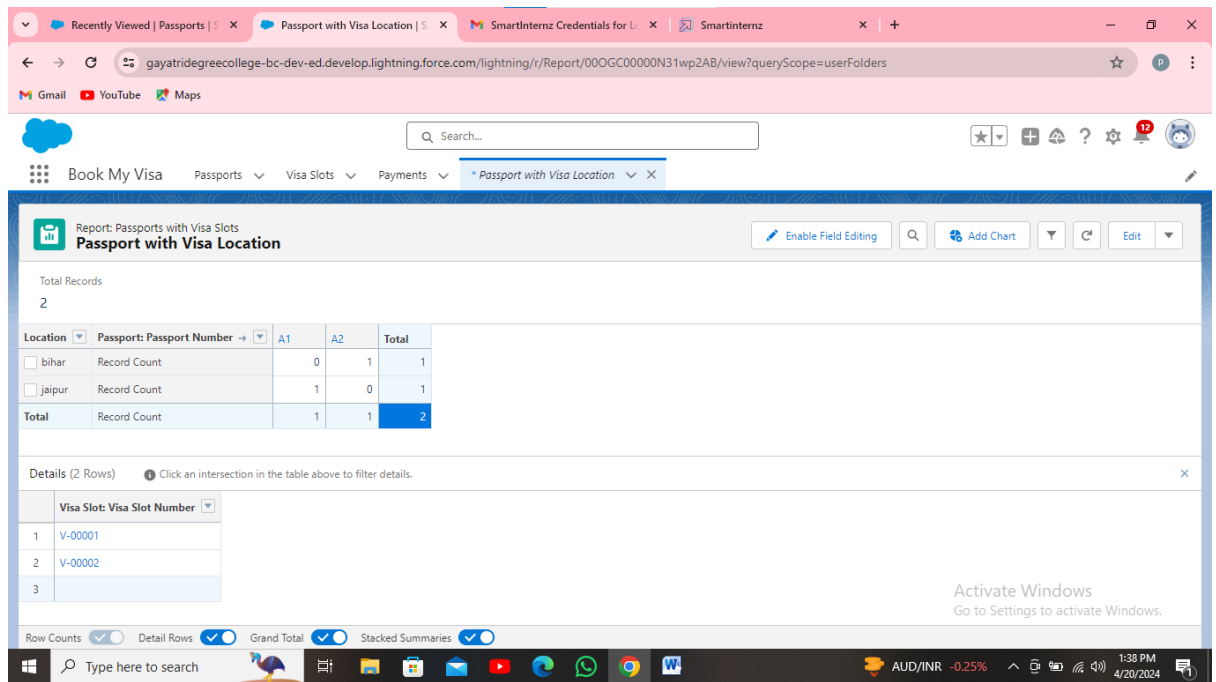
Milestone – 11: Apex Triggers

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**

```
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.');

    }

}
```
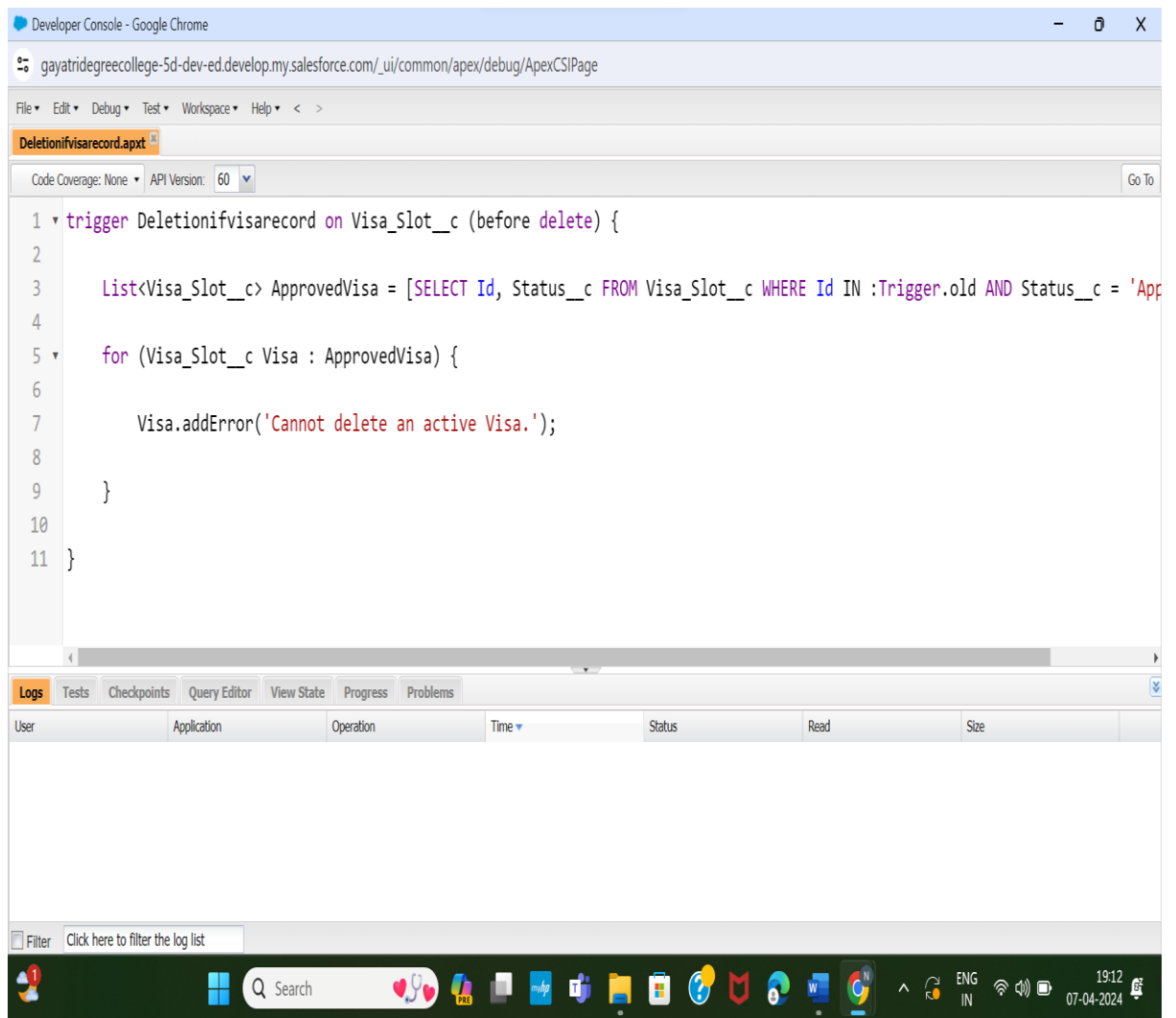
Write A Trigger-2

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.');

    }

}
```
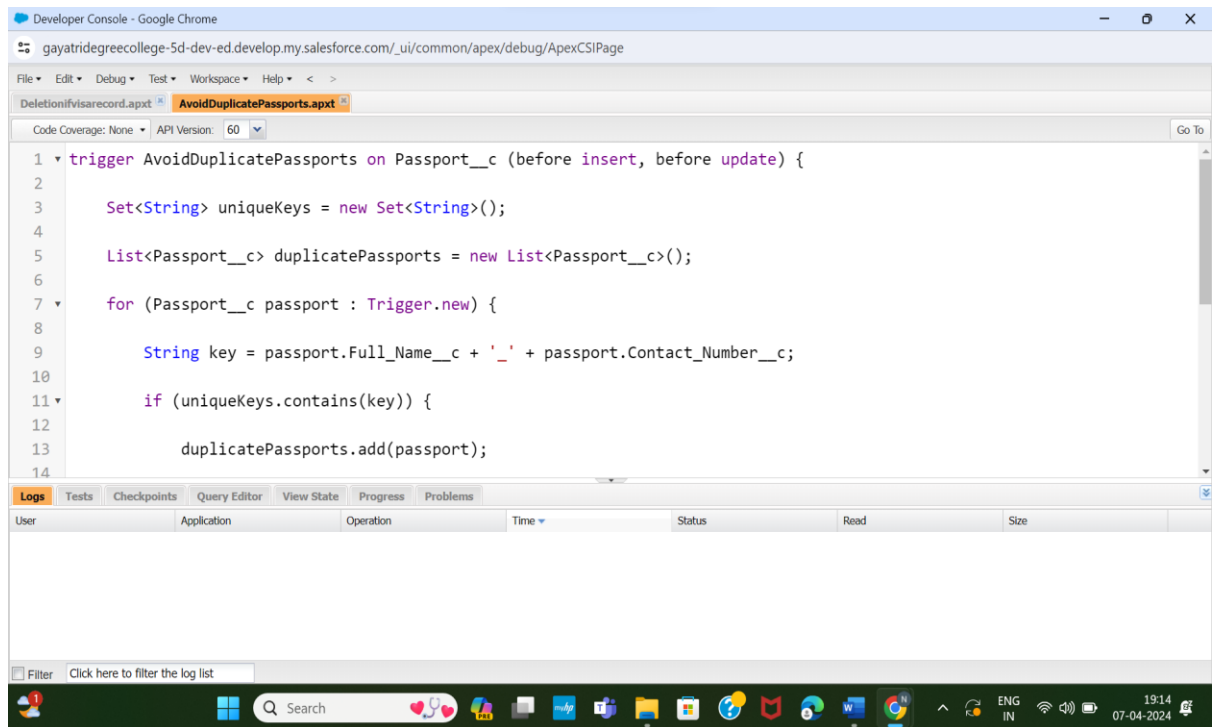
```
trigger AvoidDuplicatePassports on Passport__c (before insert, before update) {

    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);
```

THE END