

# PROJECT REPORT ON

## CRM Application That Helps to Book a Visa Slot - Developer - (Short-Term)

### Introduction:

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.

### Milestone – 01 - Creating a Developer Edition

➔ Go to [developers.salesforce.com](https://developers.salesforce.com)

- Click on sign up
- On the signup form, enter the following details:
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Role\*

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Company\*

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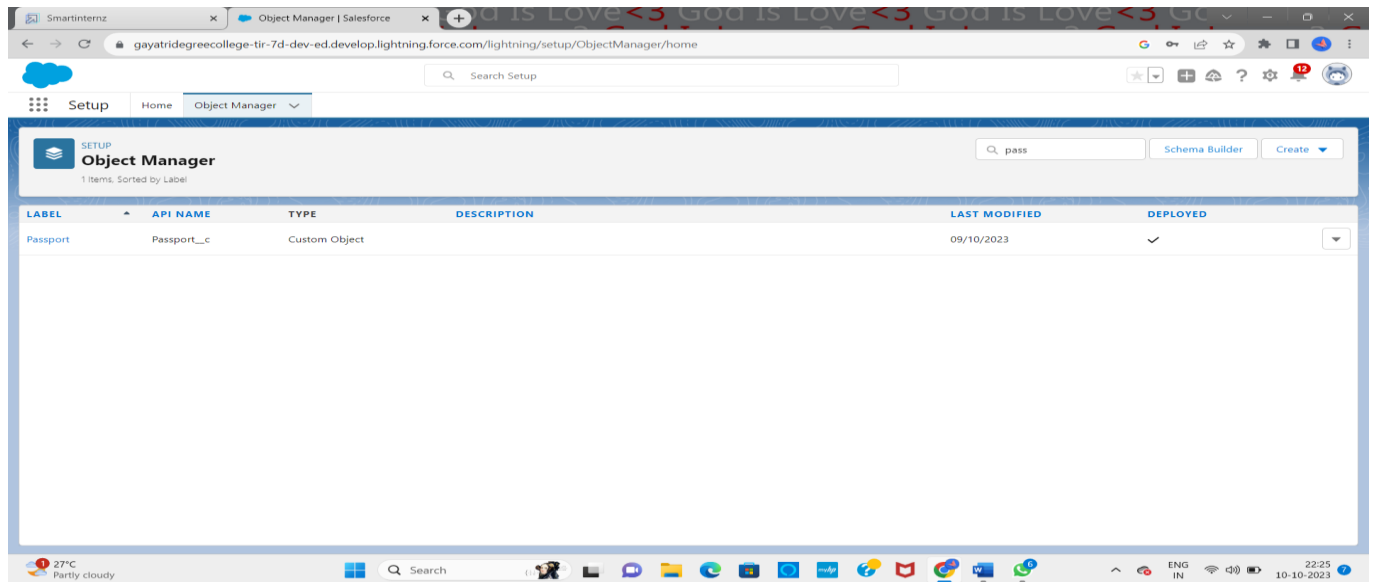
Your username must be in the form of an email address (it does not have to be real). It

### Milestone – 02- Objects Creation

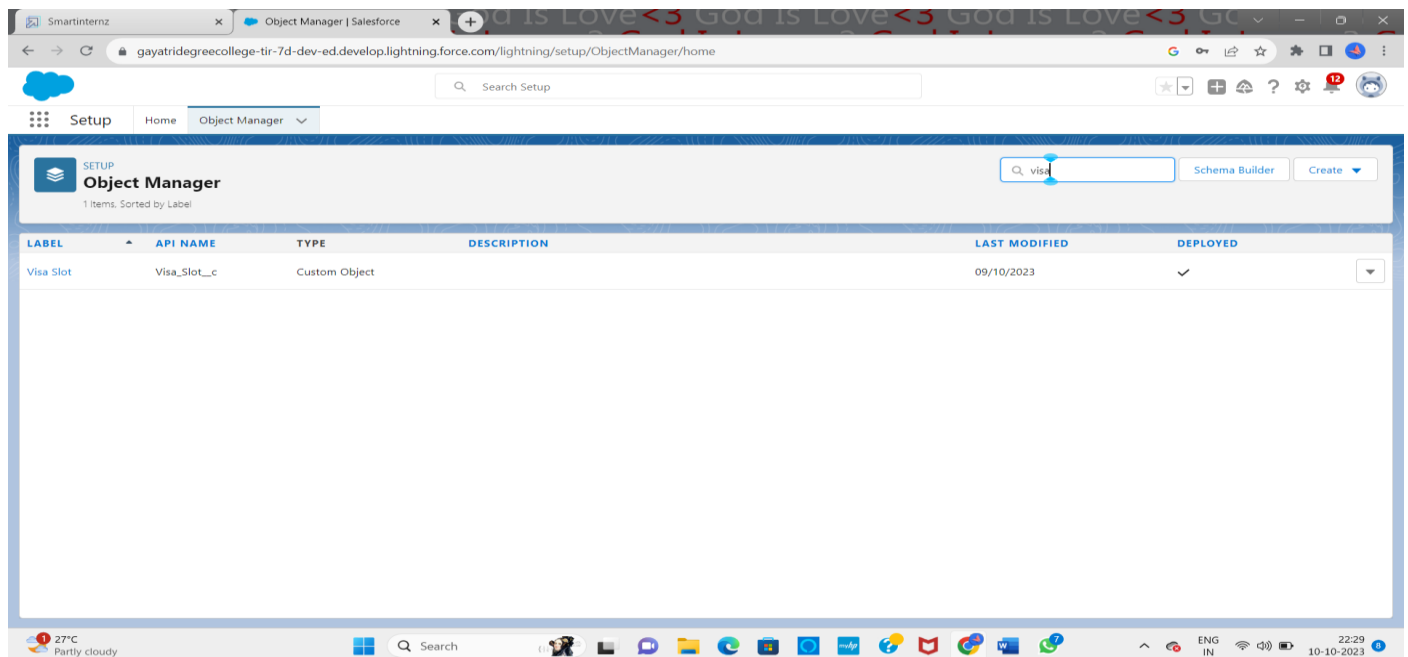
Objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types: 1) Standard object 2) Custom objects

**Objects involved in Book my visa are: Passport, Visa Slot, Payment**

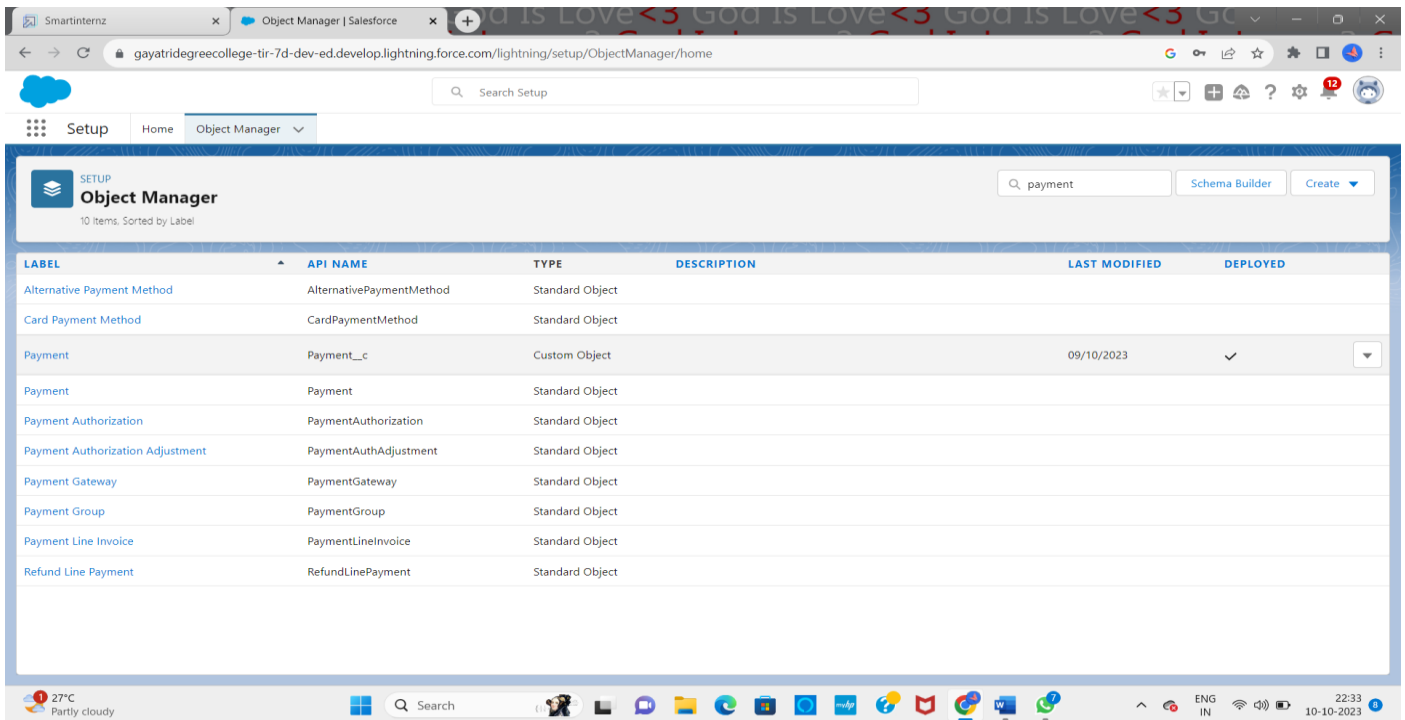
**Creation Of Custom Object Passport:**



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



**Create Of Custom Object- Payment:**



## Milestone – 03 -Tabs

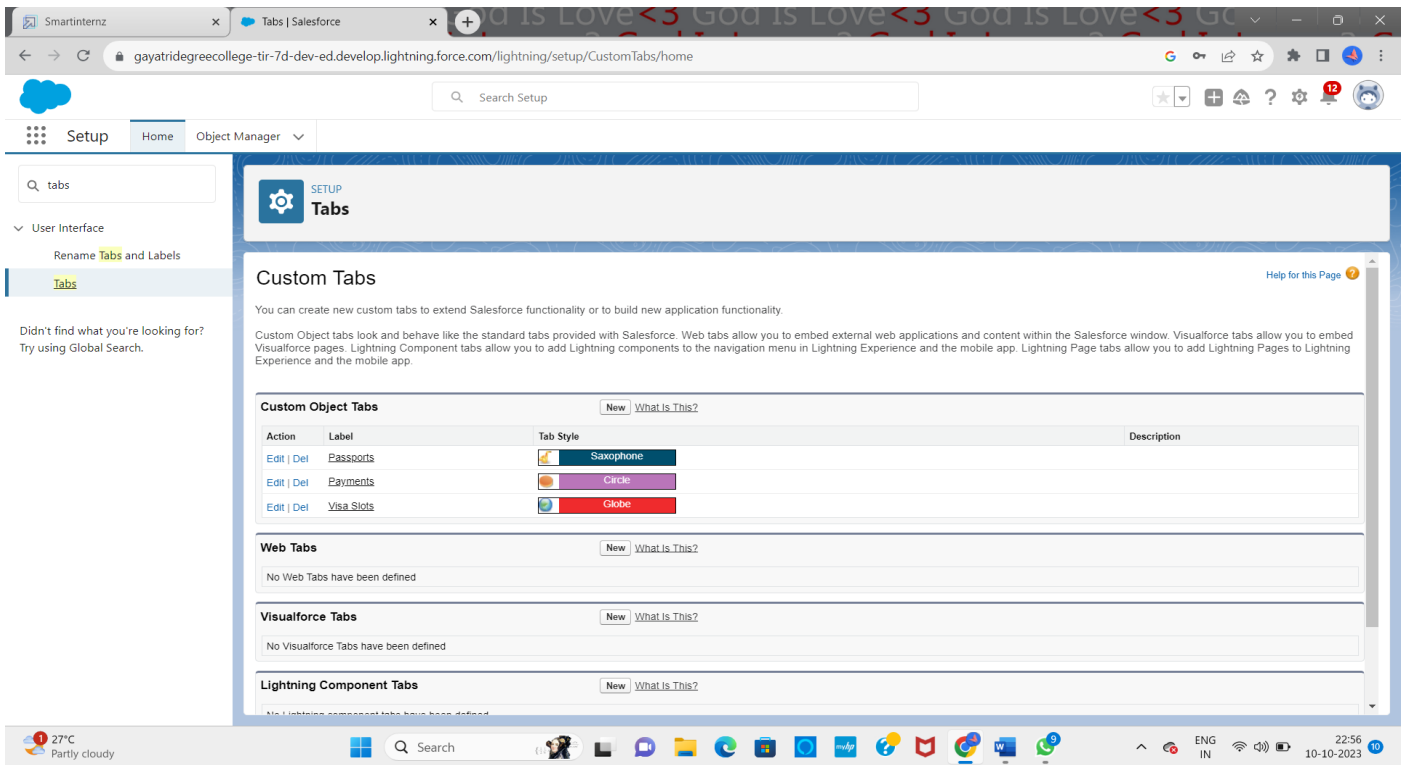
A tab is like a user interface that used to build records for objects and to view the records in the objects.

Tabs basically categorize into 4 different sections-

- Standard Object Tabs
- Custom Object Tabs
- Web Tabs
- Visualforce Tabs

## Creation Of Custom Tab- Passport Object, Visa Slot Object, Payments

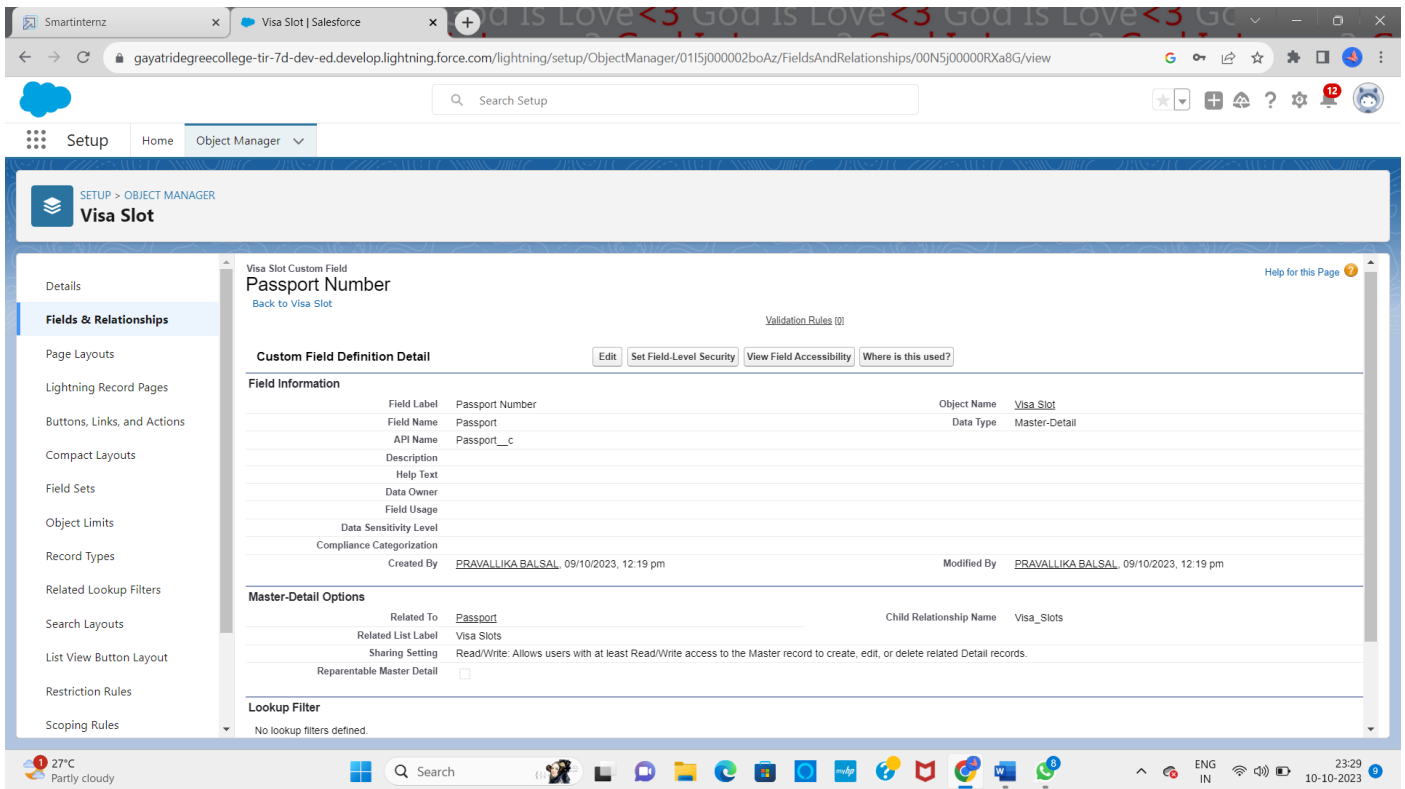
1. Navigate to setup and home
2. Enter Tabs in Quick Find Box and select Tabs
3. Under Custom Object Tabs, click New
4. For Object, select Passport
5. For Tab Style, select any icon
6. Leave all defaults as is. Click Next, Next, and Save
7. Now create custom Tabs for **Visa Slot Object & Payments** by following above steps.



## 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.
12. Now follow the same steps to create **Contact Number & Permanent Address.**

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Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Passport**

Details

**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)		

26°C Partly cloudy

Search

23:54 10-10-2023

## ❖ Fields Available on Custom Object: Visa Slot:

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Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Visa Slot**

Details

**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
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Location	Location__c	Text(250)		
Passport Number	Passport__c	Master-Detail(Passport)		✓
Status	Status__c	Picklist		
Time	Time__c	Date/Time		
Visa Slot Number	Name	Auto Number		✓

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## ❖ Field Available on Custom Object: Payment:

The screenshot shows the Salesforce Setup interface for the 'Payment' custom object. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main area displays a table of fields for the 'Payment' object, sorted by Field Label. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Cancel Transaction, Card Number, Created By, Last Modified By, Payment Mode, Transaction Id, and Visa Slot.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Cancel Transaction	Cancel_Transaction__c	Text(55)		
Card Number	Card_Number__c	Number(10, 0)		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Payment Mode	Payment_Mode__c	Picklist		
Transaction Id	Name	Auto Number		✓
Visa Slot	Visa_Slot__c	Master-Detail(Visa Slot)		✓

## 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.

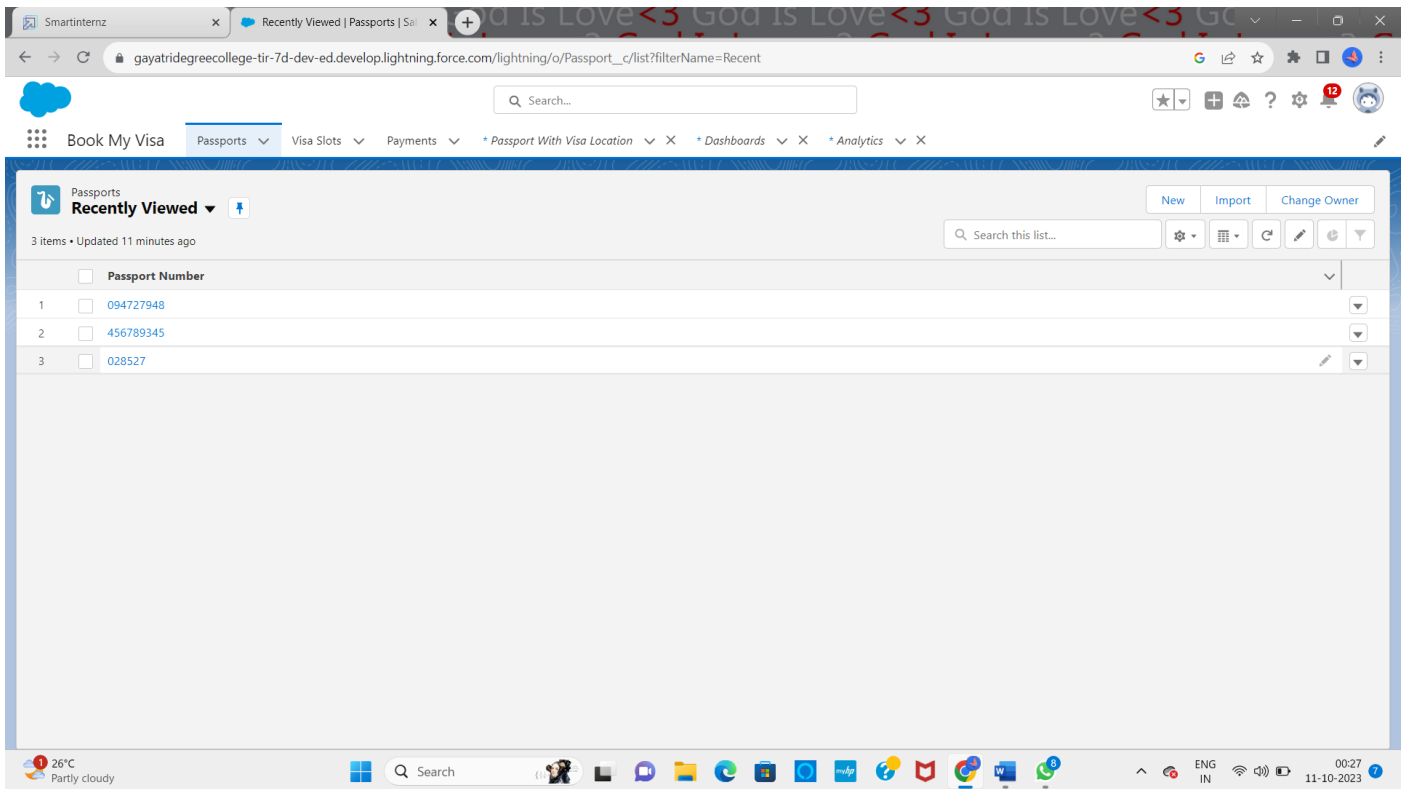
There are two types of Salesforce Applications:

Standard Apps

Custom Apps.

## ❖ Creation of Apps:

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.



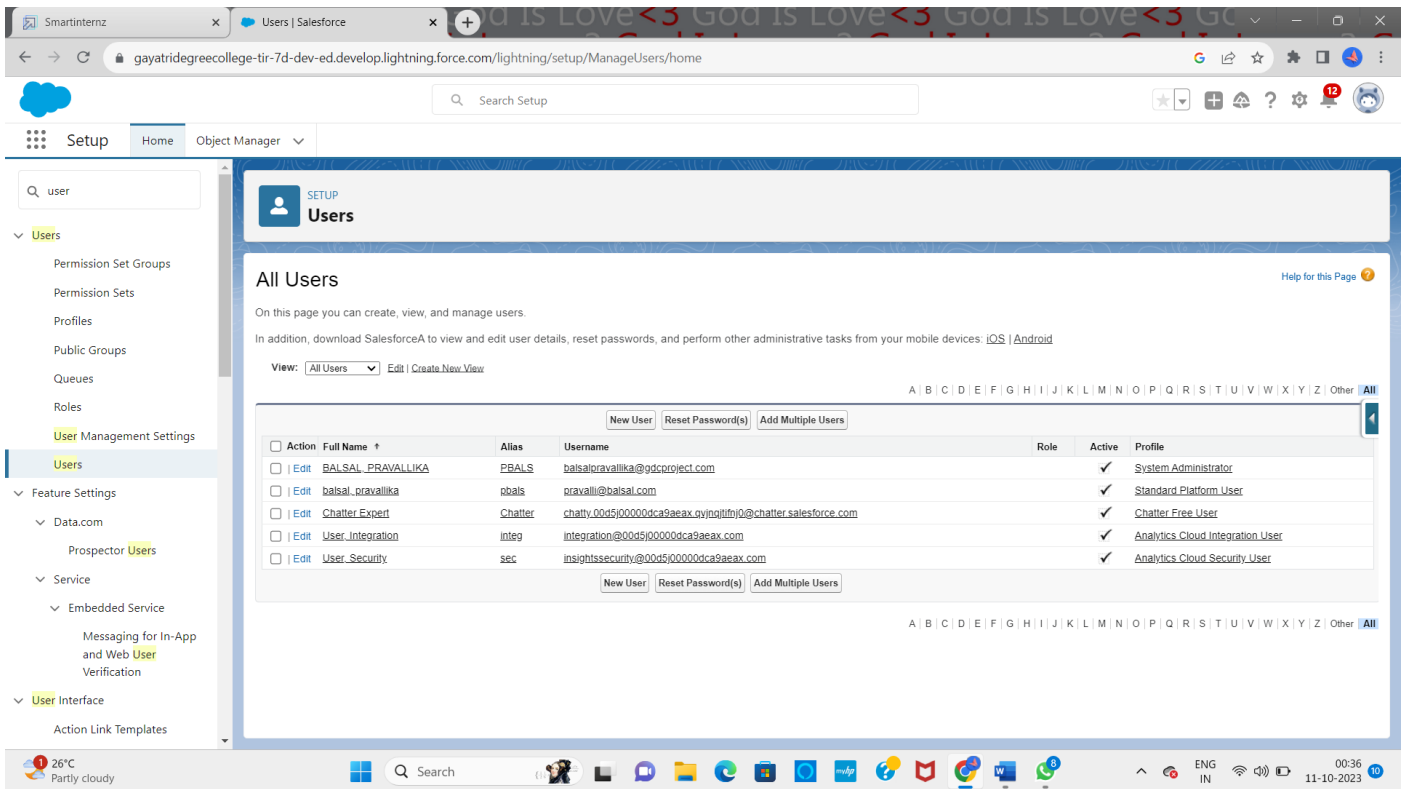
## Milestone – 07- USER

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.

### ❖ 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.

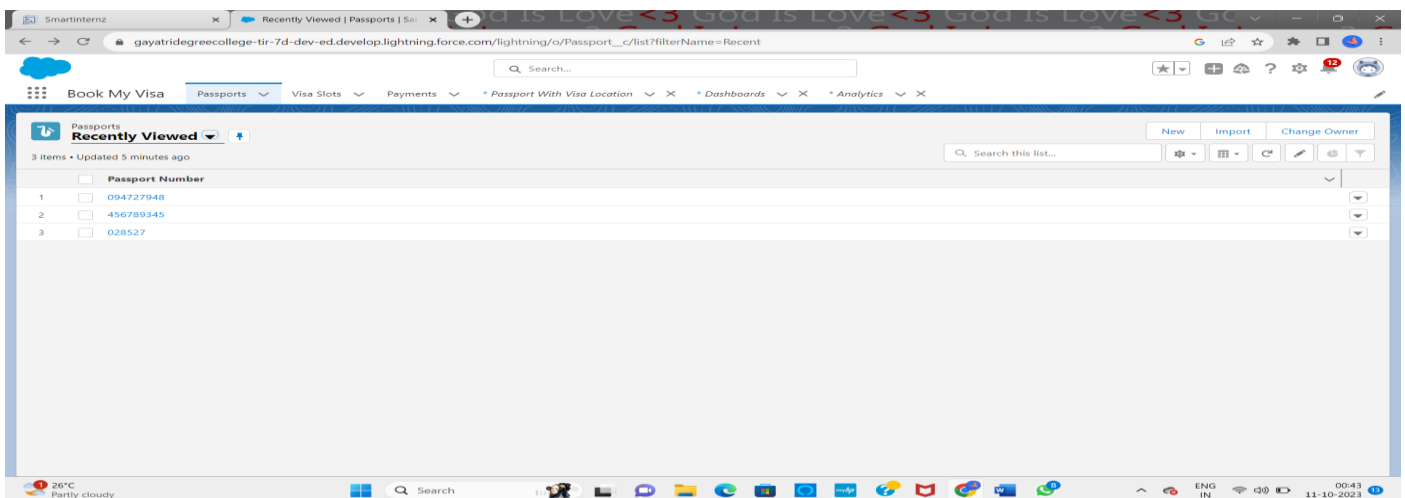




## Milestone –08- USER ADOPTION

### ❖ Create a Record on Passport object:

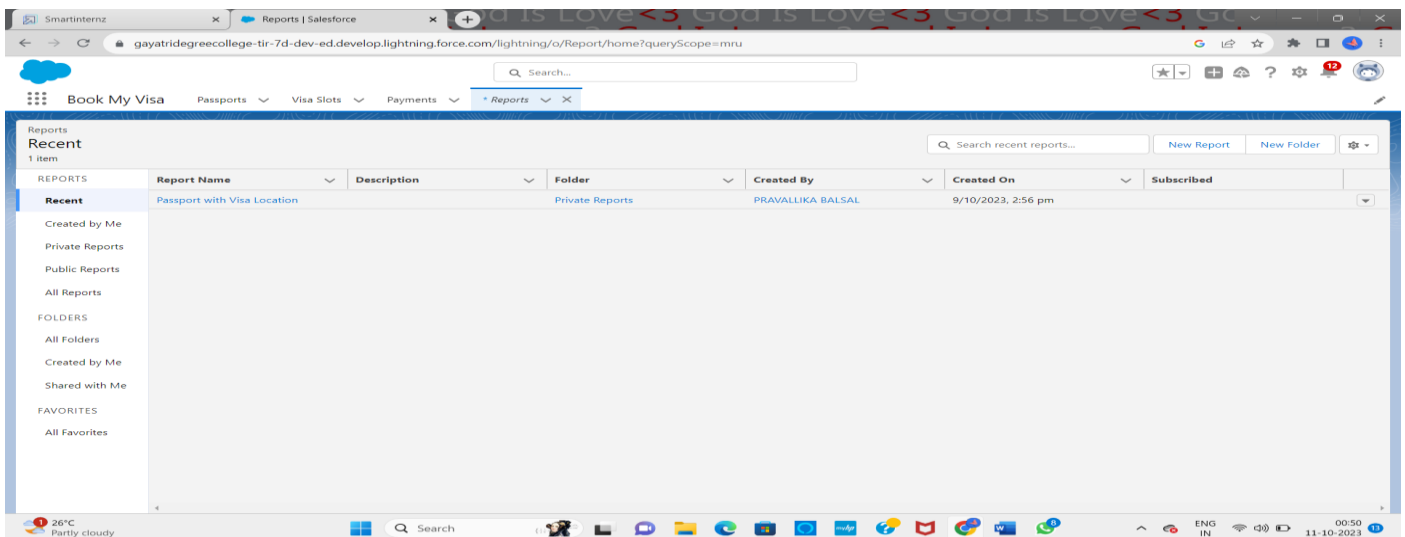
1. Click on App Launcher on left side of screen.
2. Search Book My Visa App & click on it.
3. Click on Passport tab.
4. Click new button
5. Fill all Passport record details.
6. Click on Save Button.



## 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.

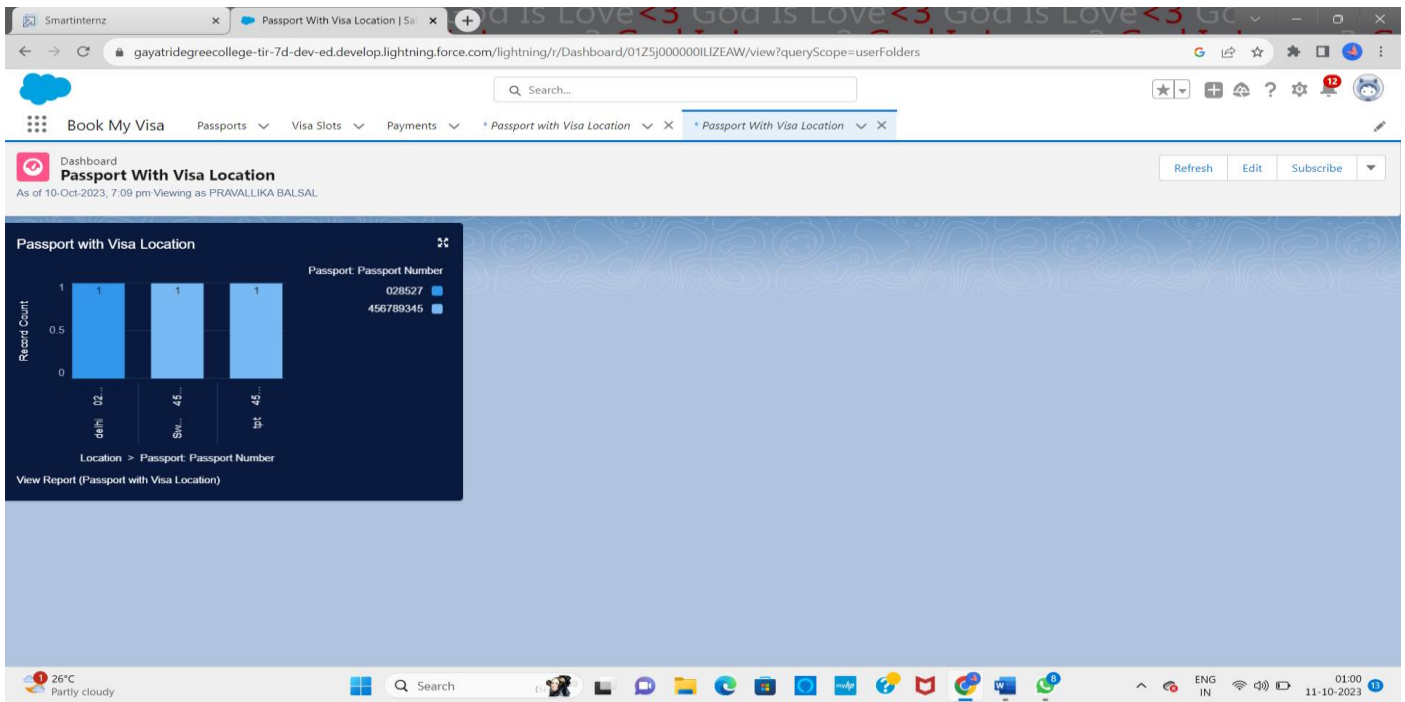


## Milestone –10-Dashboard

### ❖ 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.

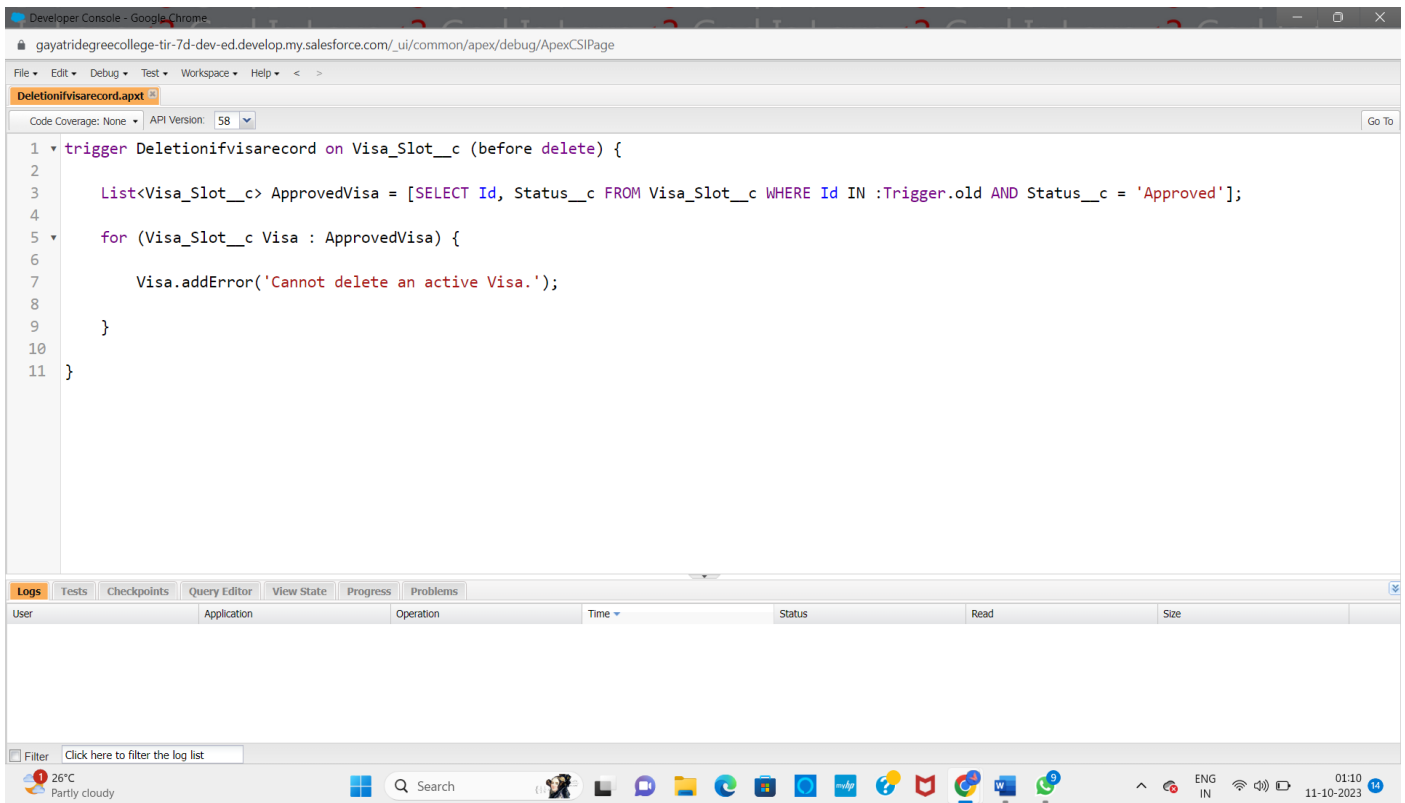


## Milestone –11- Apex Triggers

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.

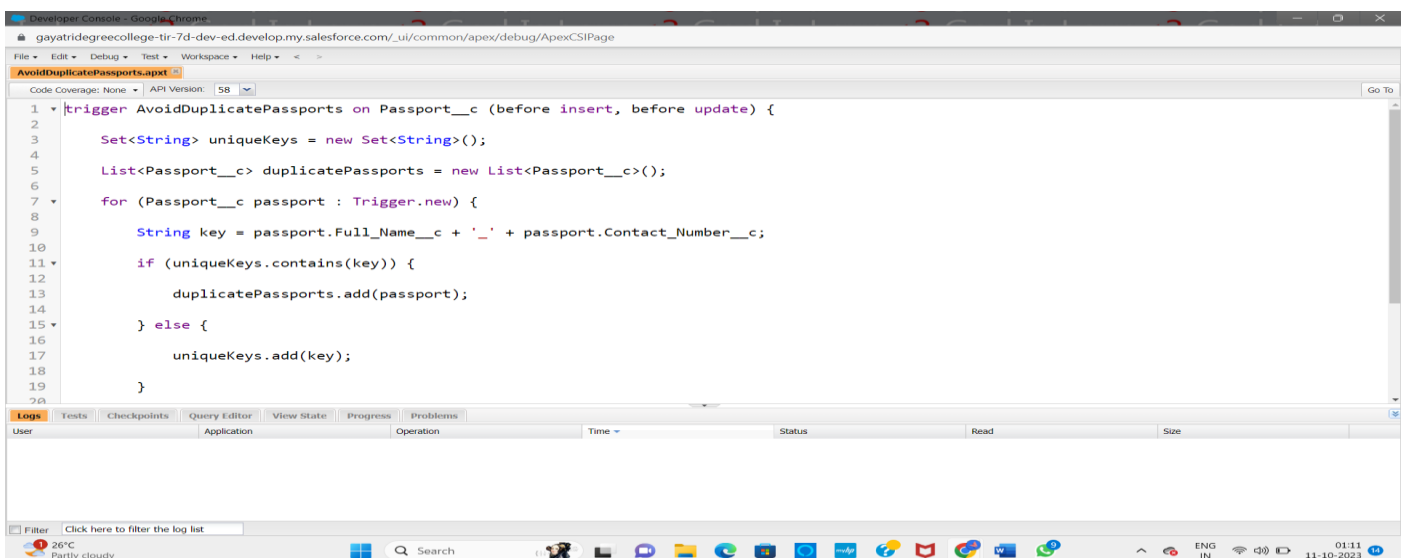
### ❖ Write A Trigger-1

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 Deletion of visa record
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 Avoid Duplicate Passport
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.



**THE END**

