



**Smart
Internz**

CRM APPLICATION THAT HELPS TO BOOK A VISA SLOT

Project Based Experiential Learning Program

CRM Application That helps to Book a Visa Slot

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-1 : Creation of developer org

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?"

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.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<https://youtu.be/r9EX3IGde5k>

Activity 1:

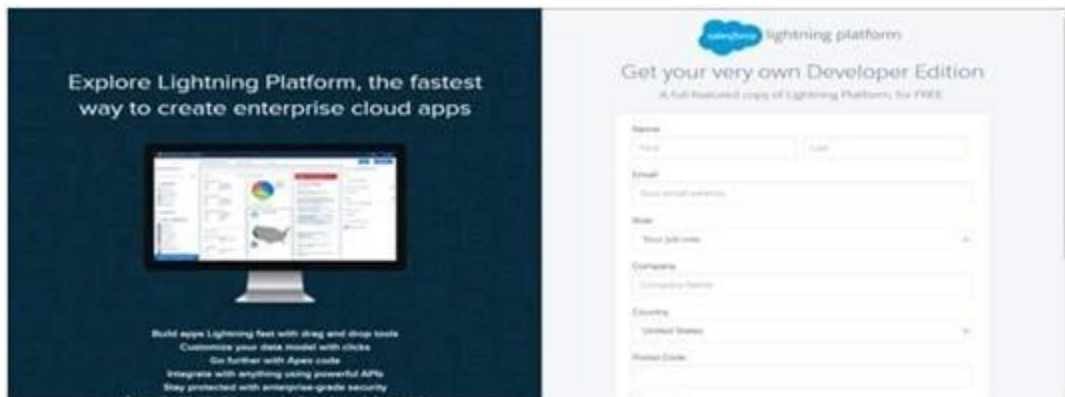
Creating Developer Account

Creating a developer org in salesforce.

1. Go to developers.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. Country : 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 :

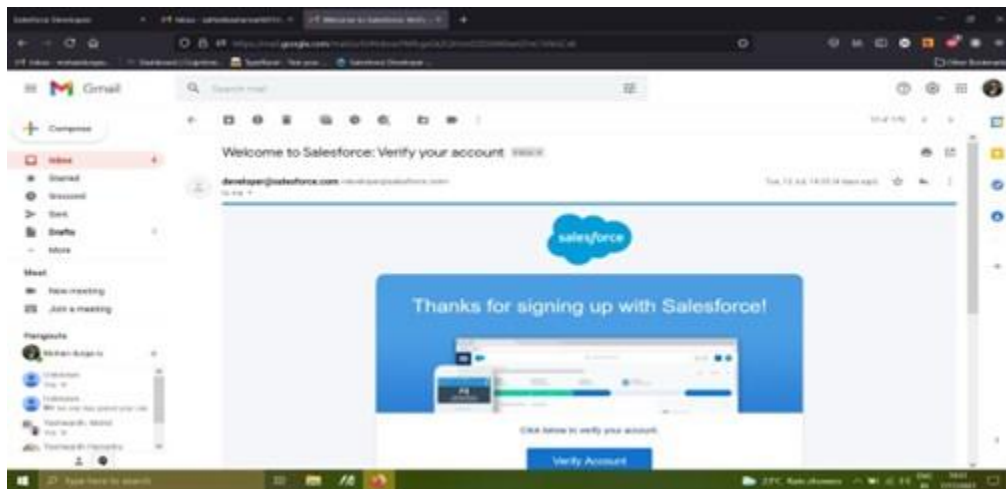
username@organization.com

Click on sign up after filling these.



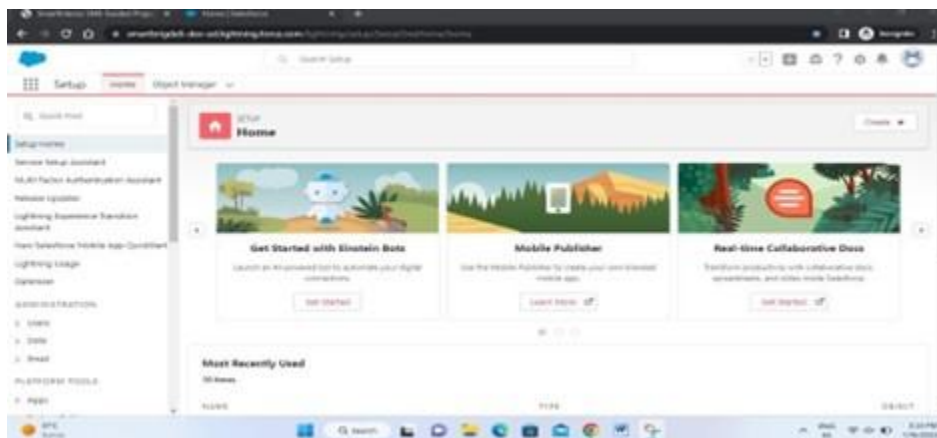
Account Activation

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.



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.

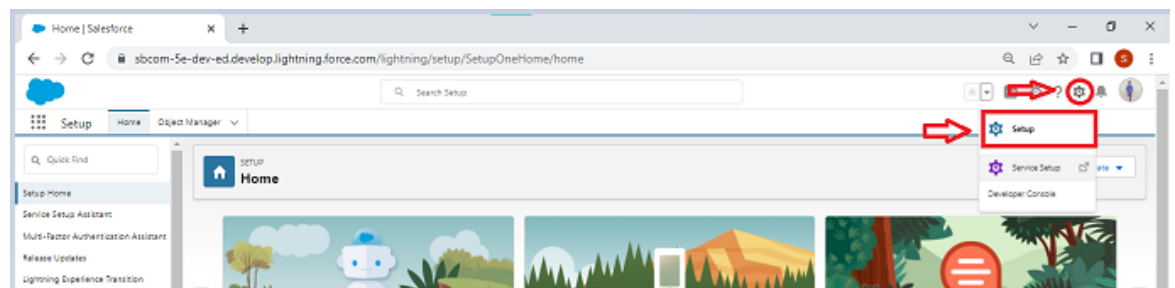
Objects involved in Book my visa are:

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(Master)	Status

Activity-1:

Creation of custom object: Passport

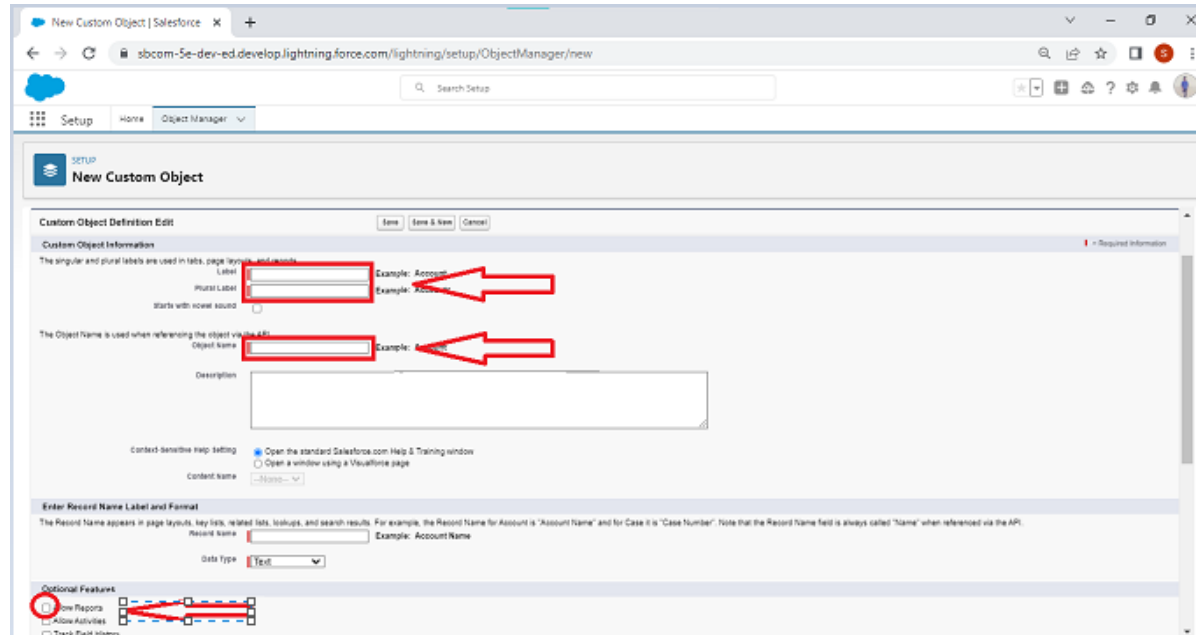
- 1) Navigate to setup and select object manager.



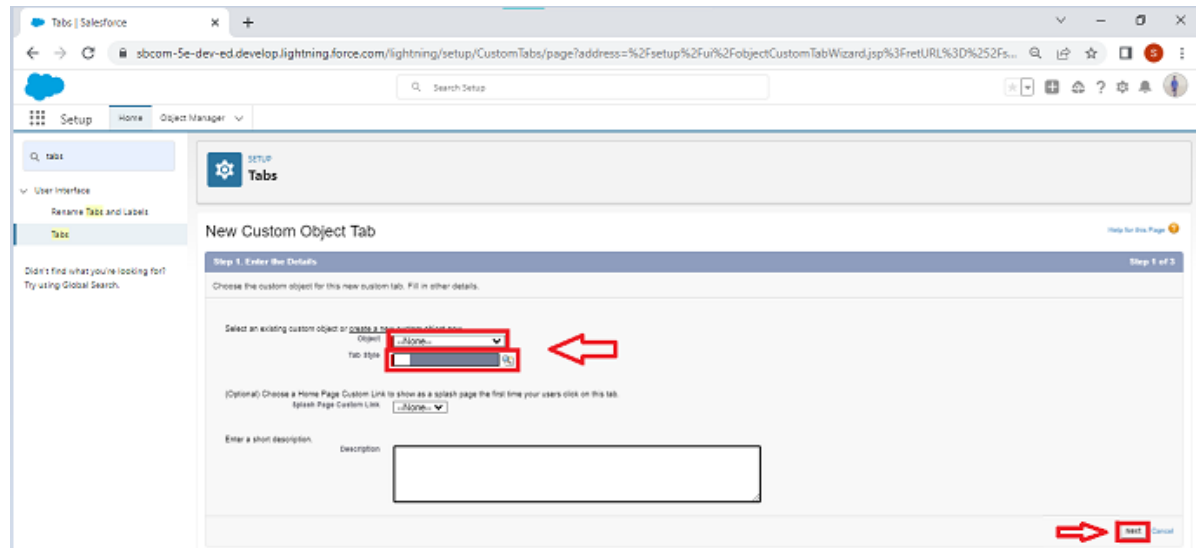
- 2) At the top of the right side there you can find create custom object.



- 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.



- 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.

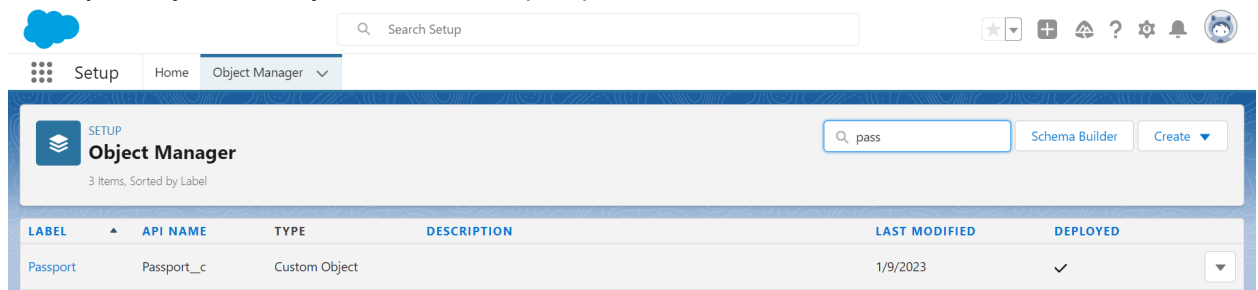
Activity-2:

Fields available on custom object: Passport

Field Name	Data Type
1) Contact Number	Number
2) Full Name	Text
3) Passport Number	Text
4) Permanent Address	Text

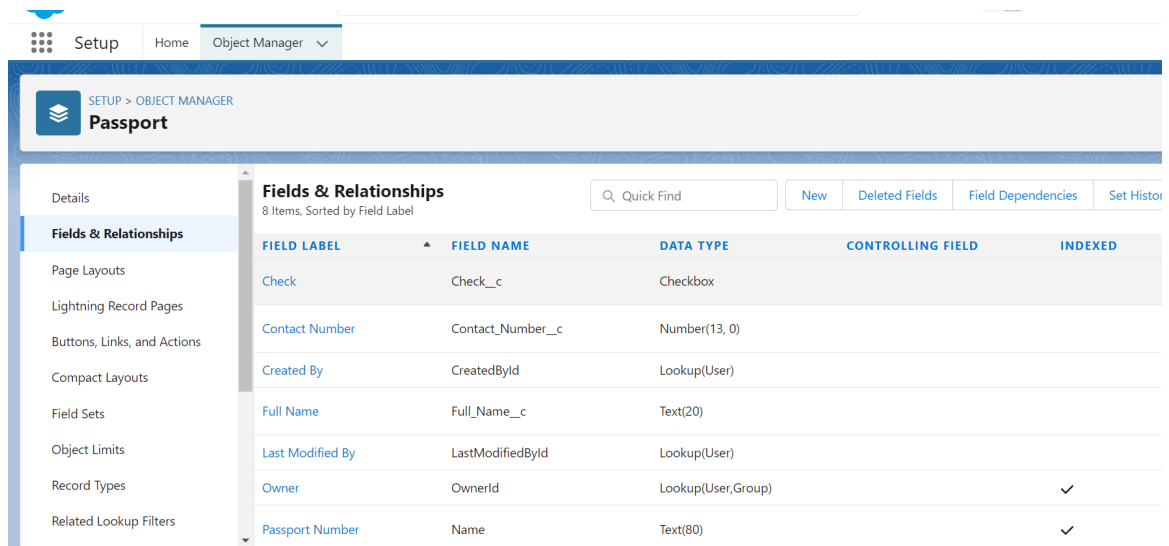
Creation of fields on custom Object: Passport

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



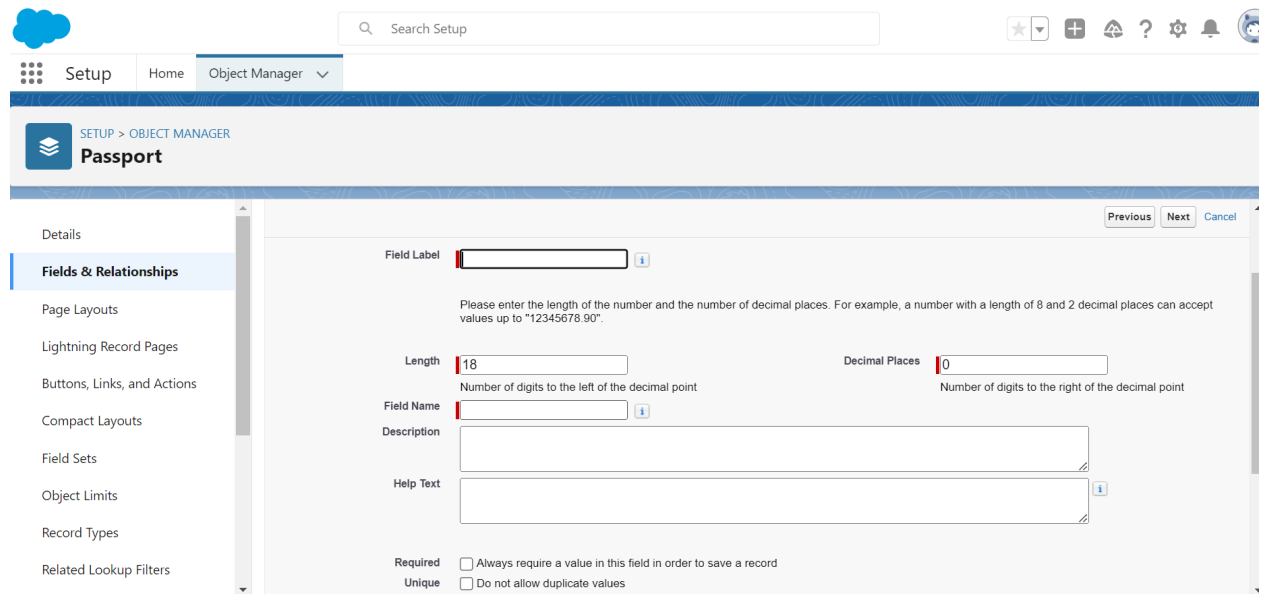
LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Passport	Passport__c	Custom Object		1/9/2023	✓

- 2) And select the option fields and relationships.



FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Check	Check__c	Checkbox		
Contact Number	Contact_Number__c	Number(13, 0)		
Created By	CreatedById	Lookup(User)		
Full Name	Full_Name__c	Text(20)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Passport Number	Name	Text(80)		✓

- 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.



Field Label:

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length: Decimal Places:

Number of digits to the left of the decimal point

Number of digits to the right of the decimal point

Field Name:

Description:

Help Text:

Required: ☐ Always require a value in this field in order to save a record

Unique: ☐ Do not allow duplicate values

- 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.

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:

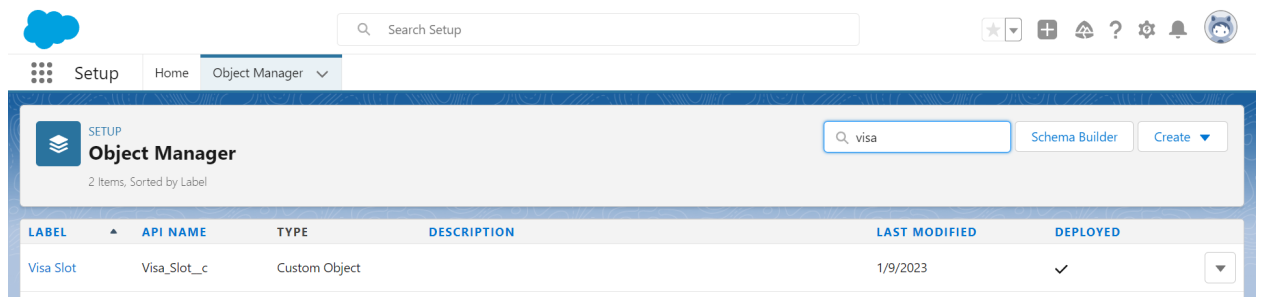
- 1) Master detail relationship: A master-detail relationship defines the relationship between the parent and the child. The master table defines the parent relation and the detail defines the child relation. If the master table is deleted then the child record data is also deleted
- 2) Look up relationship: 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:

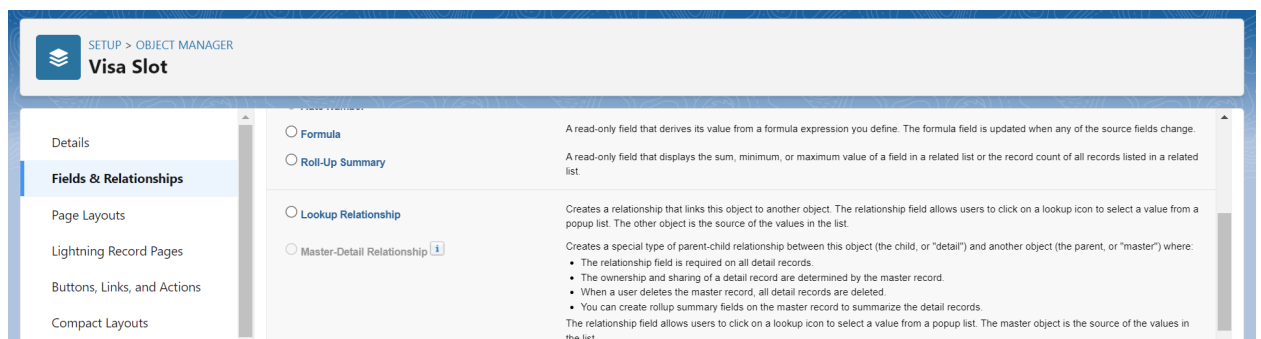
Creation of Relationship:

To create a Master Detail relationship between Passport and Visa.

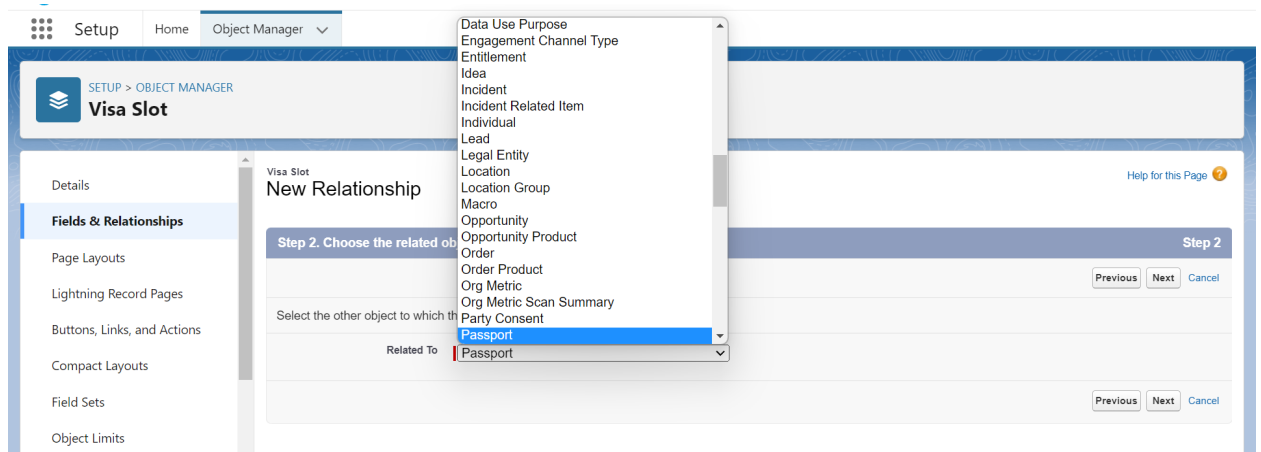
- 1) Go to the Set Up option from the Home Page and click on it.
- 2) Go to the object manager and select 'visa' object from the list



- 3) And select fields and relationships and click on new.
- 4) Select the data type has Master detail relationship



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



SETUP > OBJECT MANAGER

Visa Slot

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Visa Slot

New Relationship

Step 2. Choose the related object

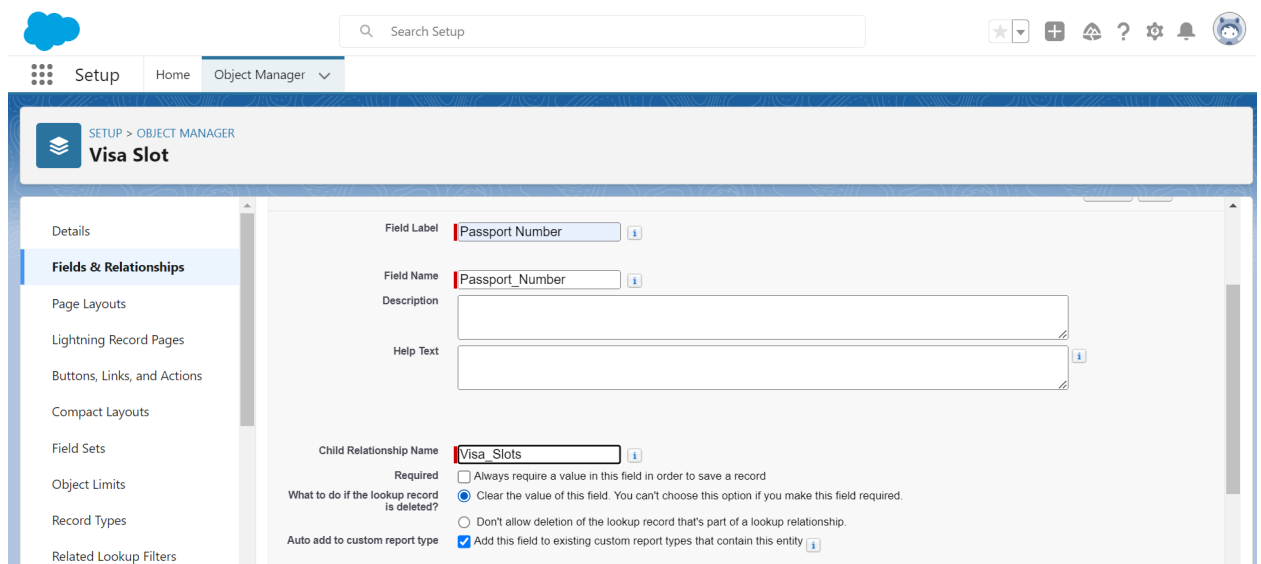
Select the other object to which this field is related

Related To

Passport

Previous Next Cancel

- 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.



Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Visa Slot

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Field Label: Passport Number

Field Name: Passport_Number

Description:

Help Text:

Child Relationship Name: Visa_Slots

Required: ☐ Always require a value in this field in order to save a record

What to do if the lookup record is deleted?: ☒ Clear the value of this field. You can't choose this option if you make this field required.

Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity

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

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:

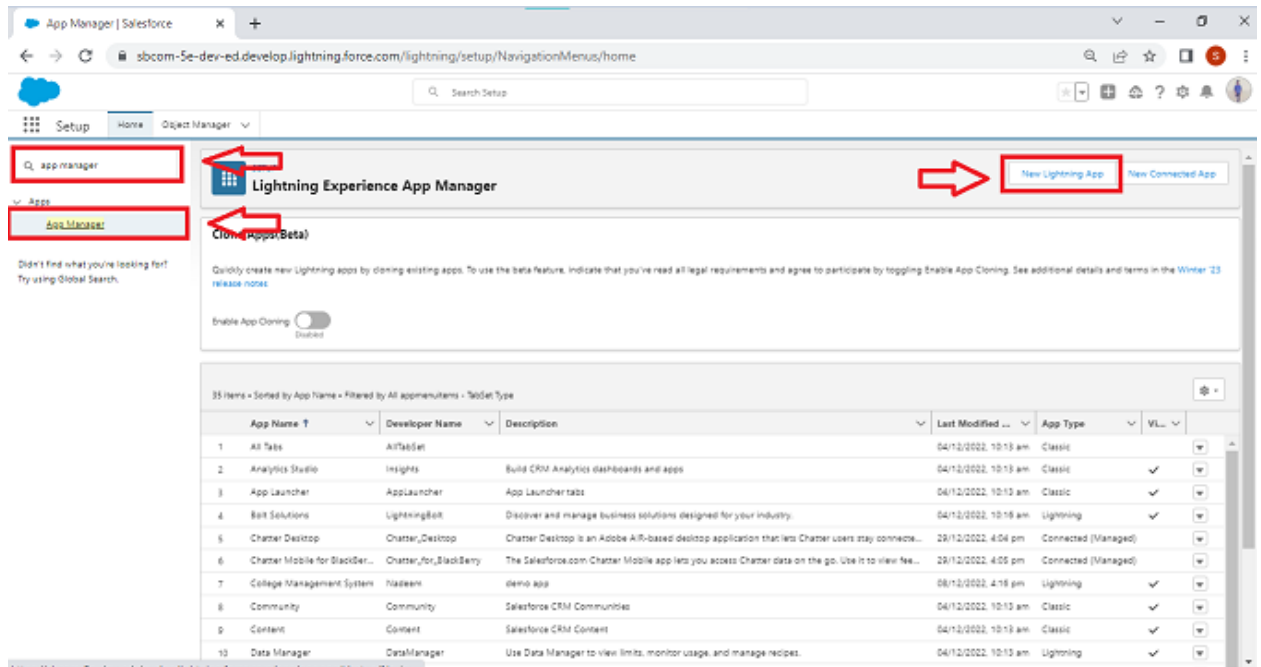
- 1) Standard App
- 2) Custom Apps

Activity:

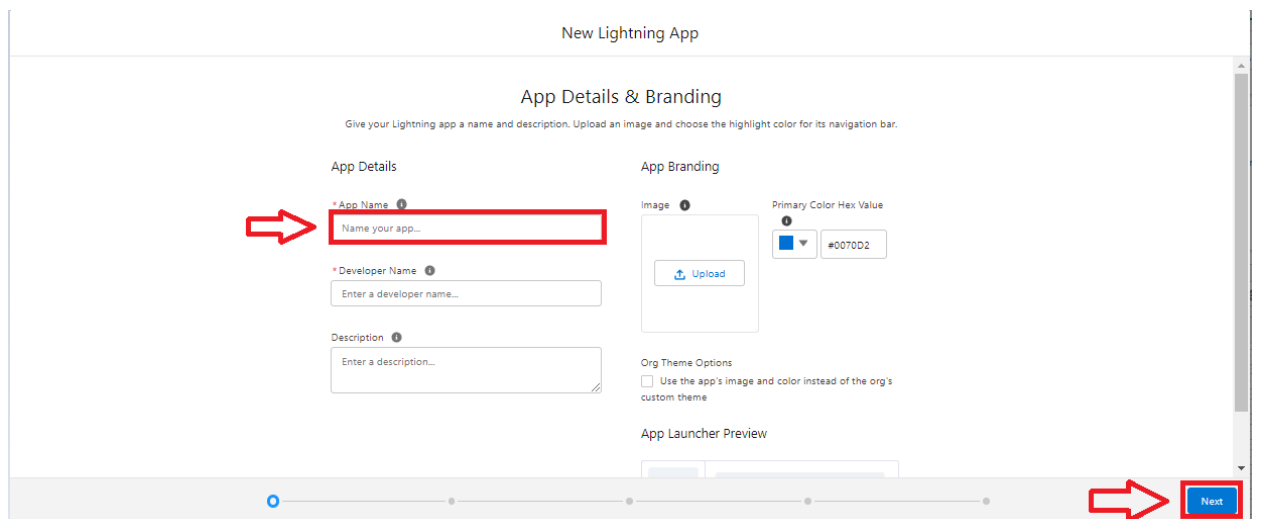
Creation of App

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



- 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.

New Lightning App

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

Create

Type to filter list...

- Accounts
- Activities
- Alert Settings
- All Sites
- Alternative Payment Methods
- App Launcher
- Appointment Invitations

Selected Items

No items selected

Back

Next

- 8) And system admin profile to available items to selected items.

New Lightning App

User Profiles

Choose the user profiles that can access this app.

Available Profiles

Type to filter list...

- Analytics Cloud Integration User
- Analytics Cloud Security User
- Authenticated Website
- Authenticated Website
- Contract Manager
- Cross Org Data Proxy User
- Custom: Sales Profile

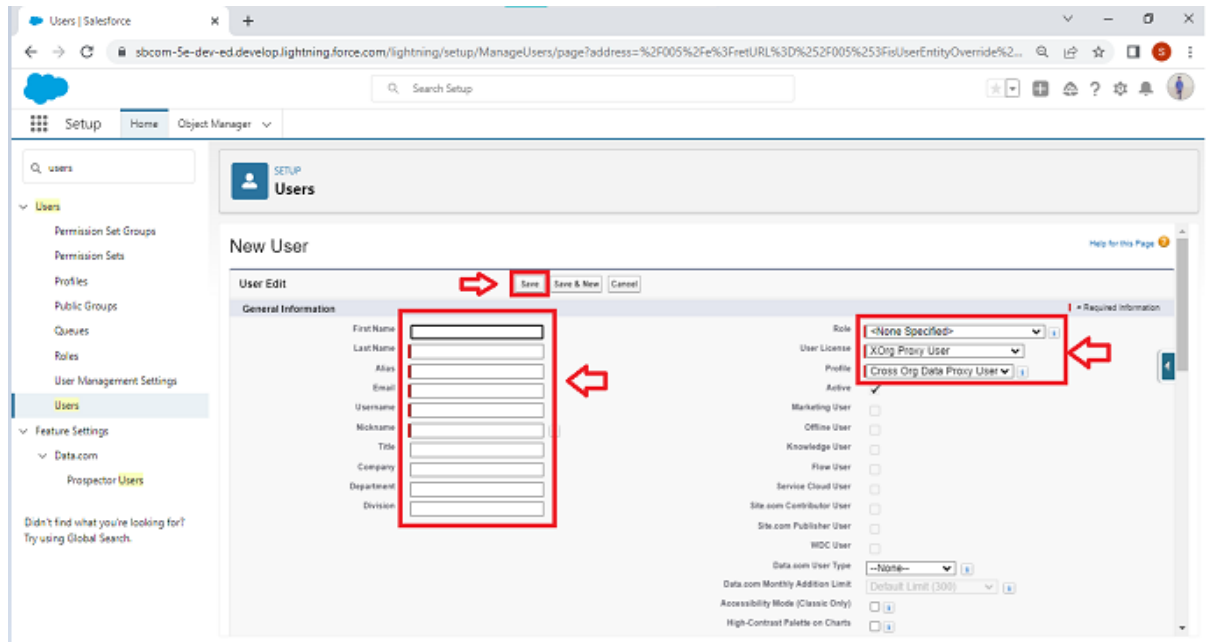
Selected Profiles

No Profiles selected

Back

Save & Finish

- 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.



The screenshot shows the 'New User' form in Salesforce. The 'First Name' field is highlighted with a red box. The 'Save' button is also highlighted with a red box. The 'Role' dropdown menu is highlighted with a red box, showing options like '<None Specified>', 'XOrg Proxy User', and 'Cross Org Data Proxy User'. Red arrows point to these elements.

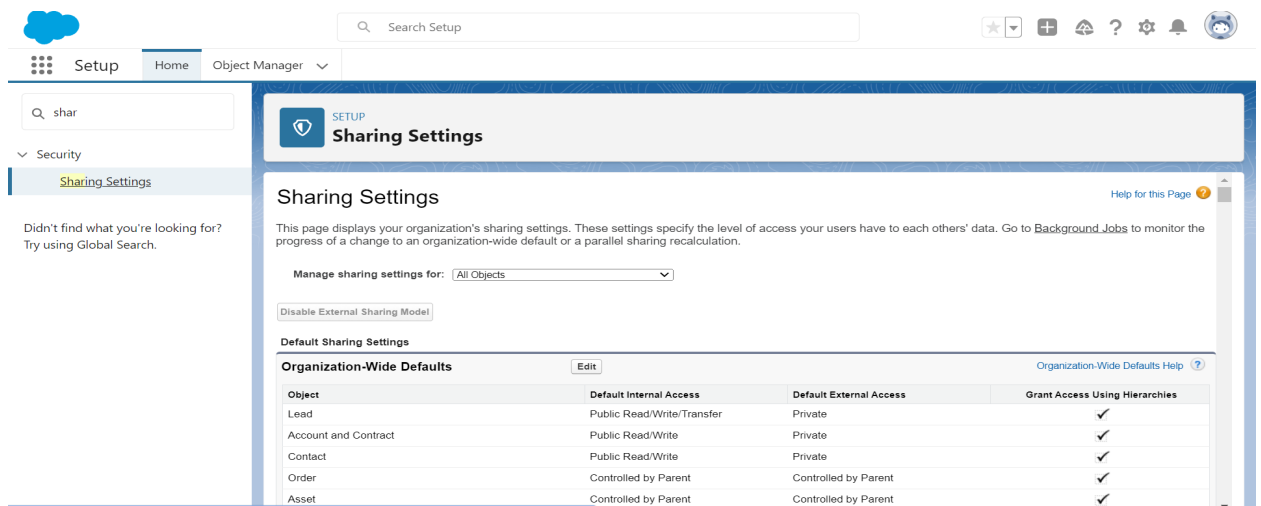
- 8) At the bottom of the page check the box to generate a new password and notify the user immediately.

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.

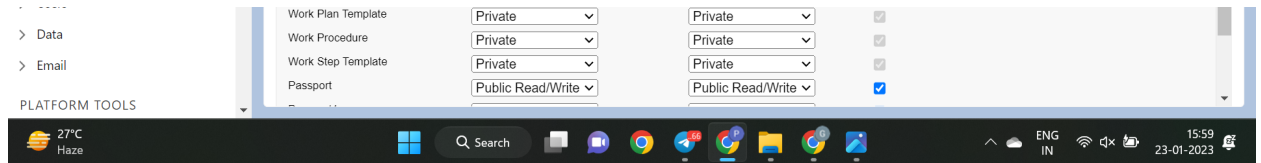


The screenshot shows the 'Sharing Settings' page in Salesforce. The 'Default Sharing Settings' section is visible, showing a table of 'Organization-Wide Defaults'.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contact	Public Read/Write	Private	✓
Contact	Public Read/Write	Private	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓

- 3) 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:

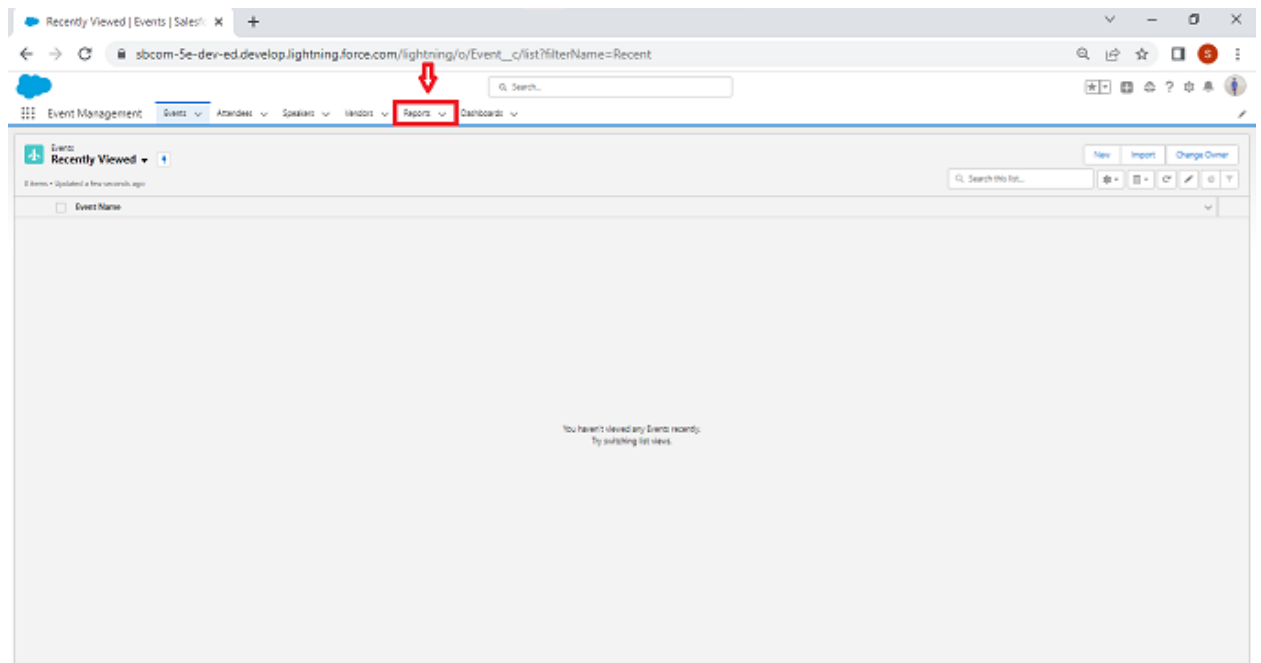
A report is a list of records that meet the criteria you define. It's displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

Activity-1:

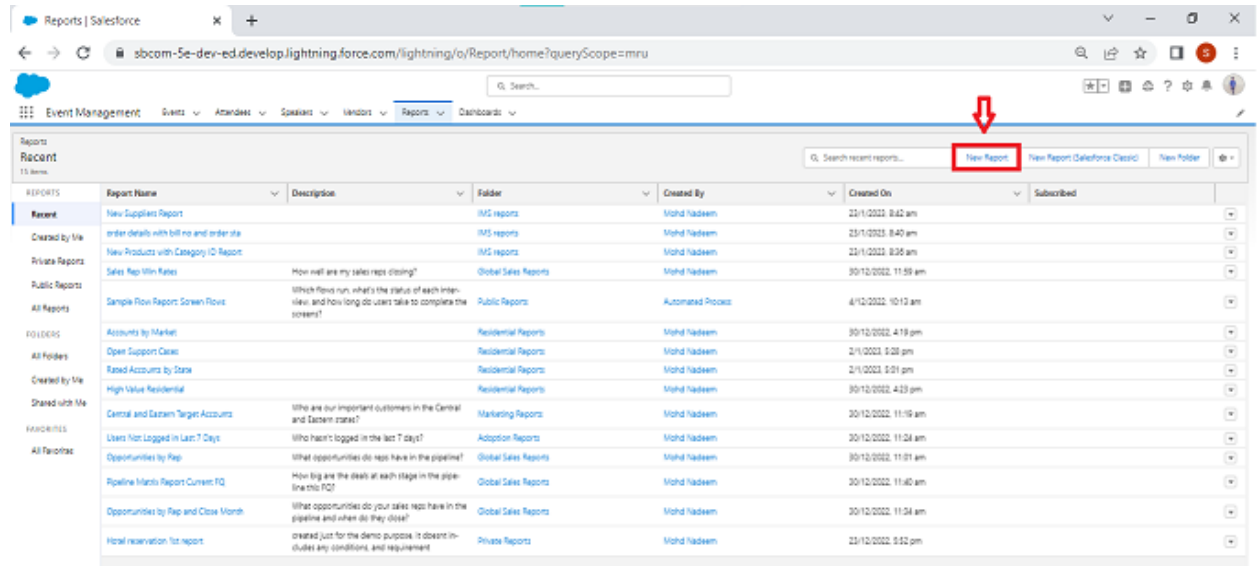
Creation of report

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.



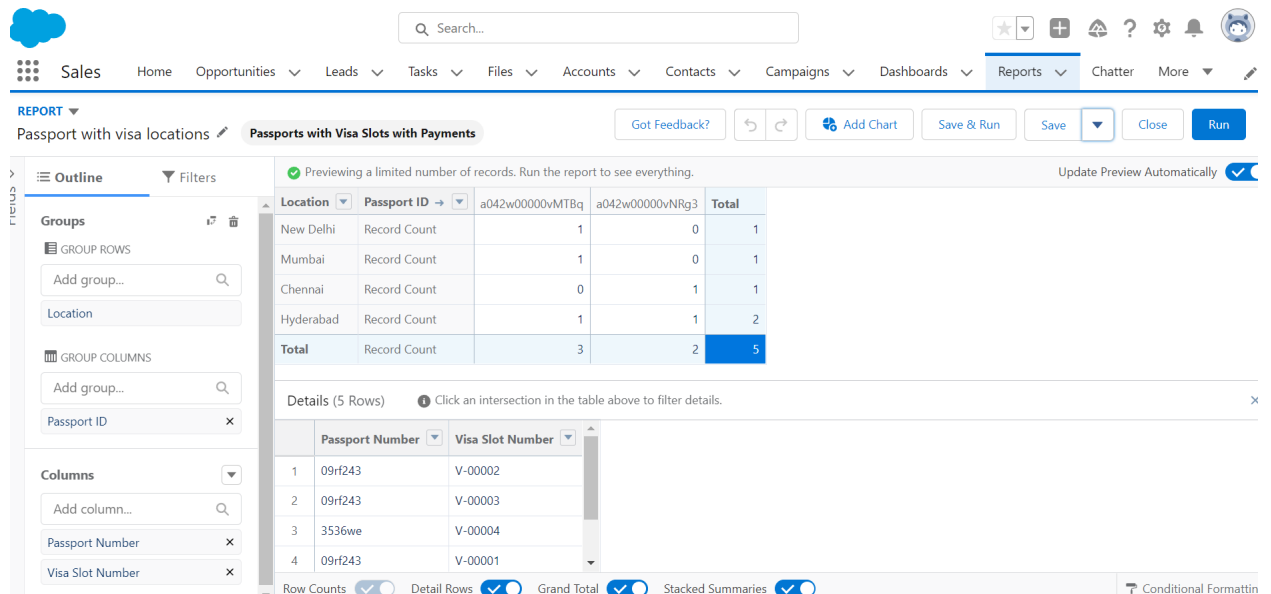
2) And select a new report, for the record type category select other reports.



The screenshot shows the Salesforce Reports interface. At the top, there's a navigation bar with 'Reports' selected. Below it, a search bar and a 'New Report' button are visible. A red arrow points to the 'New Report' button. The main area displays a list of recent reports with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. The 'Recent' tab is active, showing a list of reports like 'New Suppliers Report', 'Order details with bill no and order sta', etc.

3) Select passport with visa slots for the report type name.

4) Select the start button to create a new report.



The screenshot shows the Salesforce Report Builder interface. The report title is 'Passports with Visa Slots with Payments'. The report is previewing a limited number of records. The main table has columns: Location, Passport ID, and Total. The data shows records for New Delhi, Mumbai, Chennai, and Hyderabad. The 'Total' column shows counts for each location. The 'Outline' pane on the left shows the report structure with 'GROUP ROWS' and 'GROUP COLUMNS'. The 'Columns' section shows the selected fields: Passport Number and Visa Slot Number. The 'Details' section shows the data for the selected rows.

Location	Passport ID	Total
New Delhi	Record Count	1
Mumbai	Record Count	1
Chennai	Record Count	1
Hyderabad	Record Count	2
Total	Record Count	5

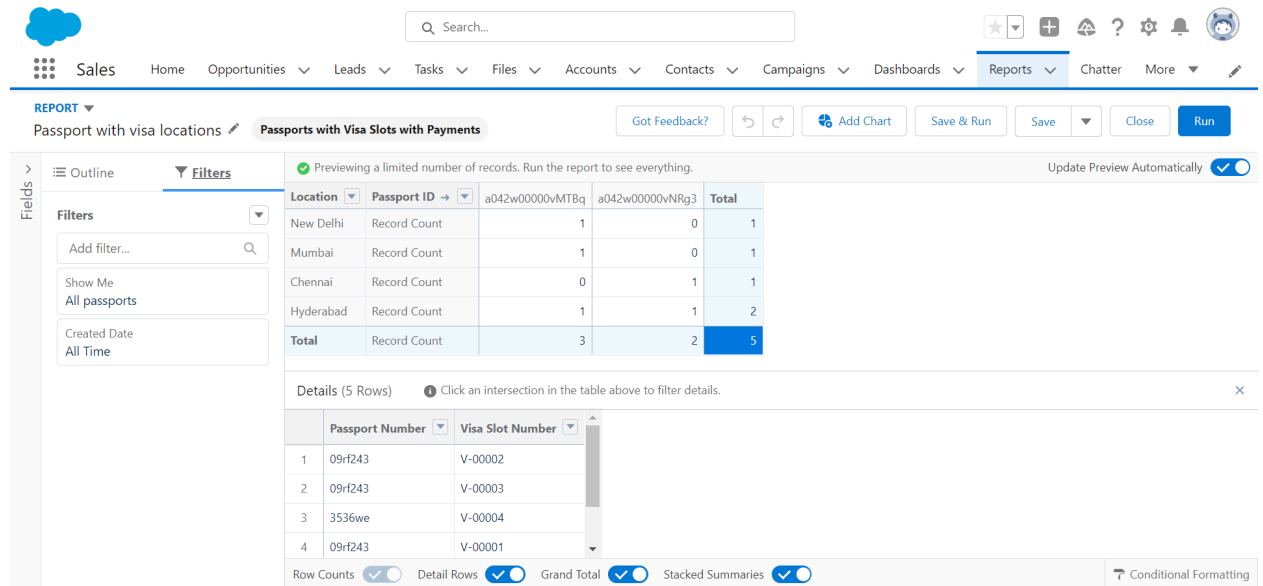
Passport Number	Visa Slot Number
09rf243	V-00002
09rf243	V-00003
3536we	V-00004
09rf243	V-00001

5) At the left side of the report you can find an outline pane.

6) In the group rows select location.

7) In the group columns select passport:passport number to display.

8) And in columns select visa slot number.



The screenshot shows the Salesforce Reports interface. The report is titled "Passports with Visa Slots with Payments". The main table displays data for different locations: New Delhi, Mumbai, Chennai, and Hyderabad. The total record count is 5.

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

The details pane shows 5 rows of data with columns for Passport Number and Visa Slot Number.

Passport Number	Visa Slot Number
09rf243	V-00002
09rf243	V-00003
3536we	V-00004
09rf243	V-00001

- 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.

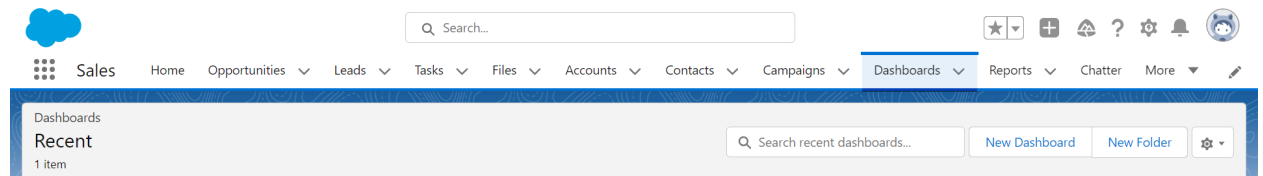
Milestone-7 Dashboards:

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

Activity

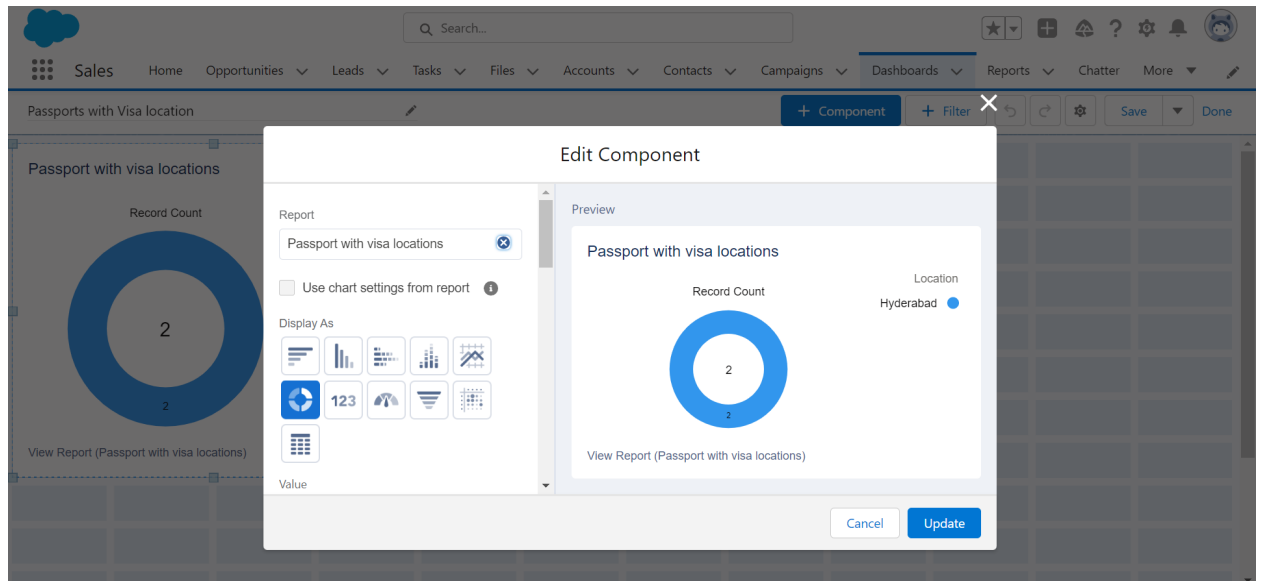
Creation of Dashboard

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

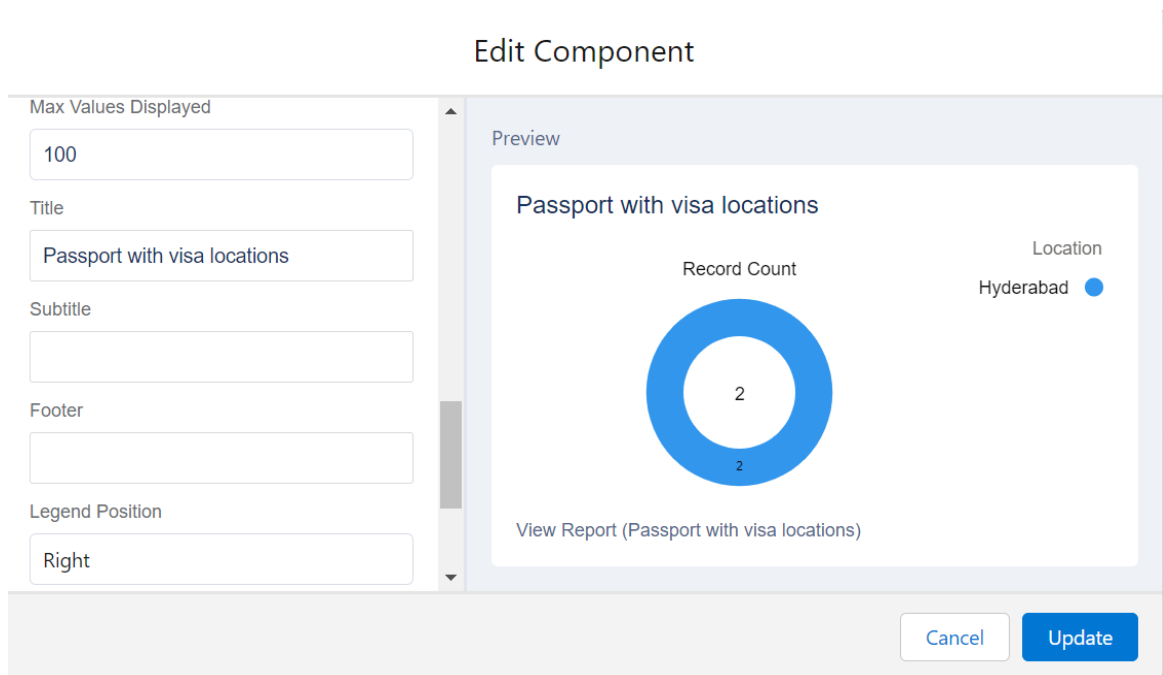


The screenshot shows the Salesforce Dashboards interface. The 'Recent' section lists 1 item. The interface includes a search bar for recent dashboards and buttons for 'New Dashboard' and 'New Folder'.

- 2)
- 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.



Edit Component

Value

Record Count

Sliced By

Location

Display Units

Shortened Number

☒ Show Values

☐ Show Percentages

☒ Combine Small Groups into "Others"

☒ Show Total

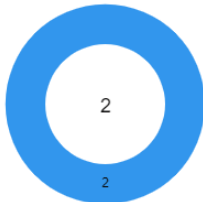
Preview

Passport with visa locations

Record Count

Location

Hyderabad ●



View Report (Passport with visa locations)

Cancel

Update

- 9) Leave the default values.
- 10) Click on add.
- 11) And save the dashboard.