

MUTHURANGAM GOVT ARTS AND SCIENCE COLLEGE(A)- VELLORE

CRM Application that helps to book a visa slot

PROJECT SUBMITTED BY:

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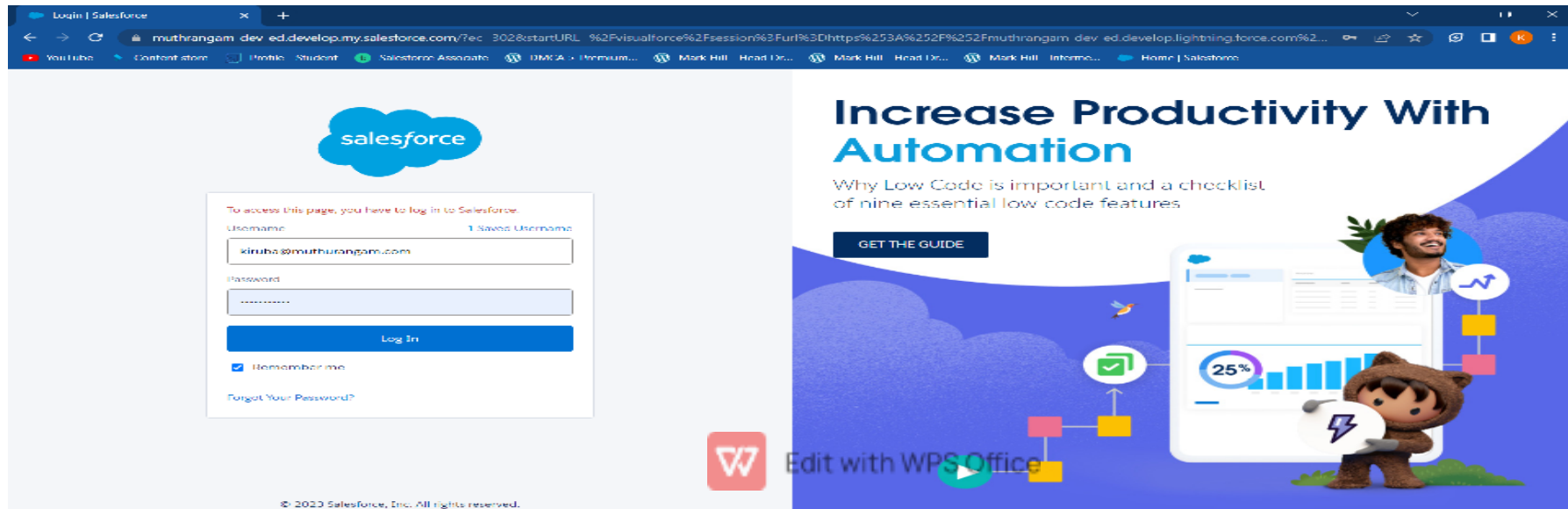
1. Creation of Dashboard



MILESTONE-1:

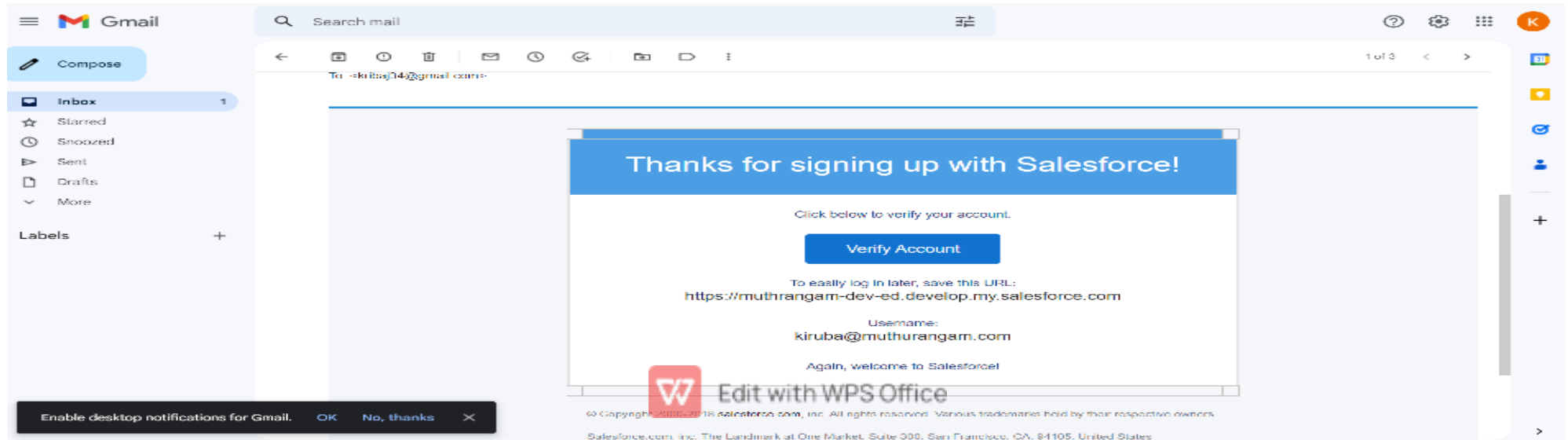
Creating developer account:

1. Go to developers.salesforce.com
2. Click on sign up.
3. Enter the username and password that you just created.



ACCOUNT ACTIVATION:

Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account.



After login this is the home page which you will see

The screenshot shows the Salesforce Setup Home page. At the top, there is a navigation bar with the Salesforce logo, a search bar labeled "Search Setup", and several utility icons (star, plus, cloud, question mark, gear, bell, and a profile icon). Below the navigation bar, there is a sidebar on the left with a "Quick Find" search bar and a list of navigation items: "Setup Home", "Service Setup Assistant", "Multi-Factor Authentication Assistant", "Release Updates", "Lightning Experience Transition Assistant", "Salesforce Mobile App", "Lightning Usage", "Optimizer", "ADMINISTRATION" (with sub-items: Users, Data, Email), and "PLATFORM TOOLS" (with sub-items: Subscription Management, Apps, Feature Settings). The main content area is titled "Home" and features three large cards: "Get Started with Einstein Bots" (with a "Get Started" button), "Mobile Publisher" (with a "Learn More" button), and "Real-time Collaborative Docs" (with a "Get Started" button). Below these cards is a section titled "Most Recently Used" showing 10 items. The first item in the list is "kirulze.karan" with the type "User".

Setup Home

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

> Subscription Management

> Apps

> Feature Settings

Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

Get Started

Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Learn More

Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

Get Started

Most Recently Used

10 items

| NAME | TYPE | OBJECT |
|-------------------------------|------|--------|
| kirulze.karan | User | |



Edit with WPS Office

MILESTONE:2

- Creation of custom objects: PASSPORT

- 1) Select your object from object selection has passport
- 2) And select the option fields and relationships
- 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..

The image displays two side-by-side screenshots of the Salesforce Setup interface, illustrating the steps to create a custom object named 'Passport'.

Left Screenshot: New Custom Object Page

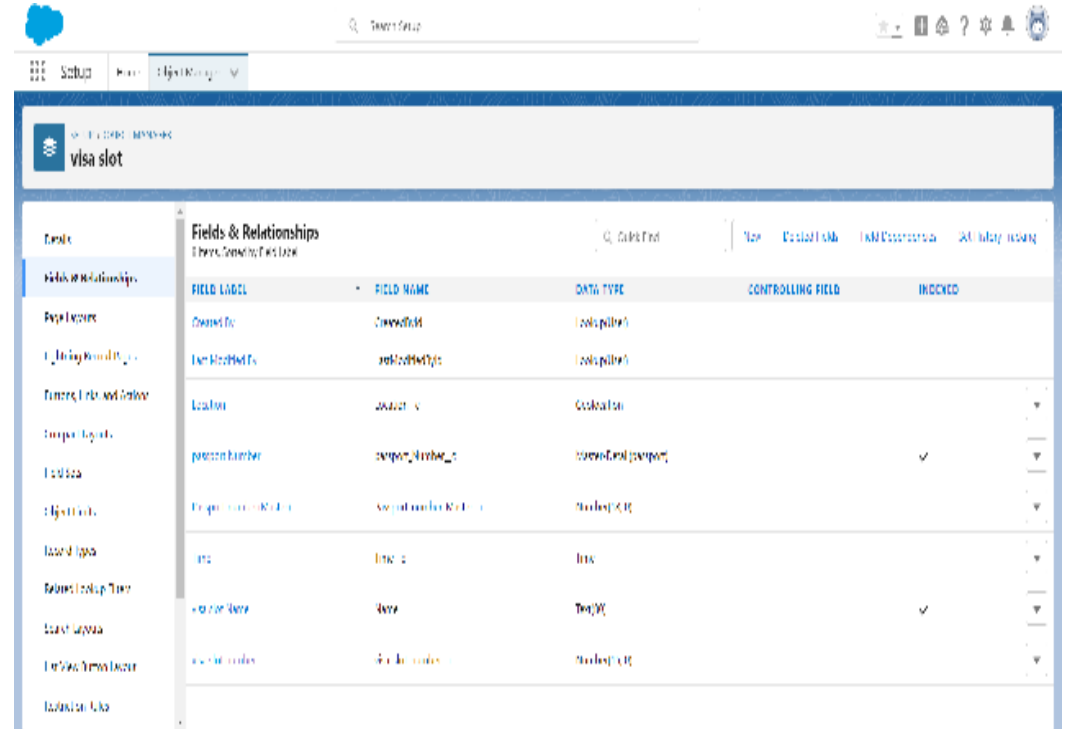
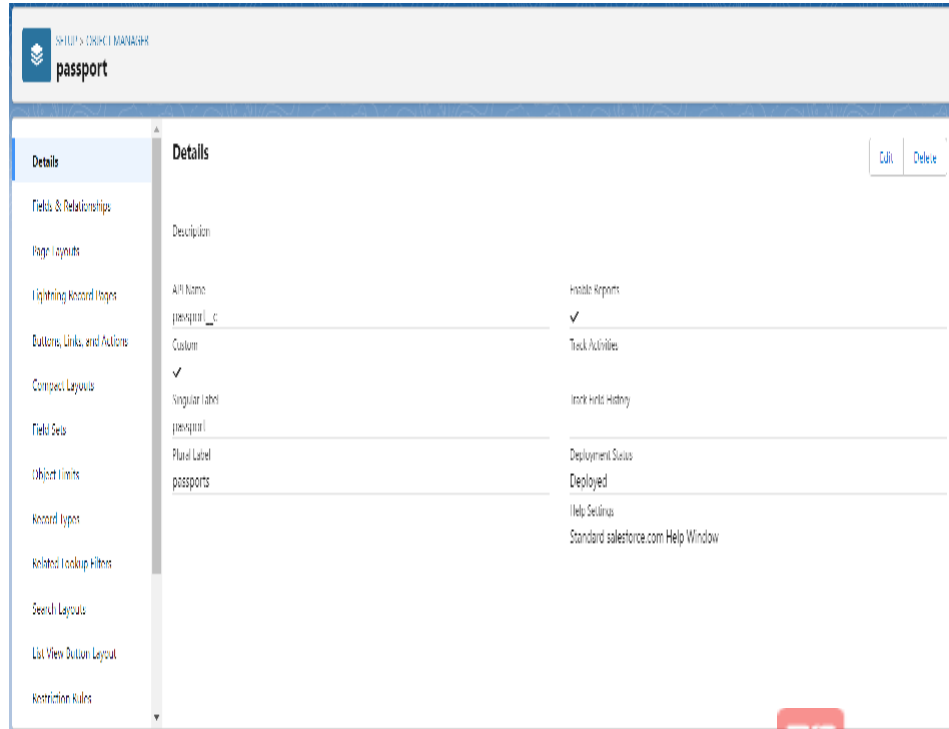
- The page title is "New Custom Object".
- Under "Custom Object Definition Edit", there are tabs for "Name", "Fields & Relationships", and "Layouts".
- The "Custom Object Information" section is active, showing fields for "Object Name" (set to "Passport"), "Plural Label" (set to "Passports"), and "Record Name Label and Format" (set to "Passport Number").
- The "Data Type" is set to "Text".
- The "Deployment Status" is set to "Deployed".

Right Screenshot: Setup > Object Manager - Passport Page

- The page title is "SETUP > OBJECT MANAGER Passport".
- The "Details" section is active, showing the "Enter Record Name Label and Format" section.
- The "Record Name" is set to "Passport Number" and the "Data Type" is set to "Text".
- The "Optional Features" section is visible, with checkboxes for "Allow Reports", "Allow Activities", "Track Field History", "Allow in Chatter Groups", and "Enable Licensing".

Fields available on custom object: Passport:

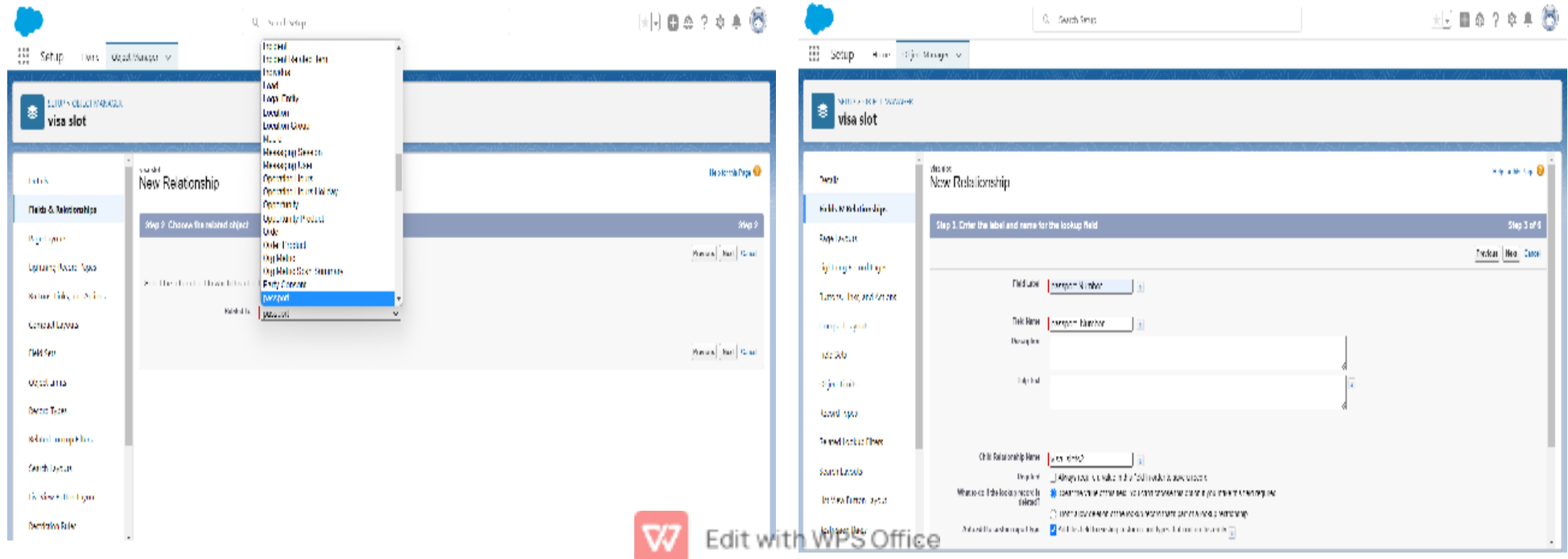
- 1) Select your object from object selection has passport
- 2) And select the option fields and relationships
- 3) At the top right side you can find a new select that option.
- 4) Now you have to select data type, select number has data type.
- 5) And you will navigate to enter the details page where you give the field label
- 6) Select the next option, select the page layout and save it



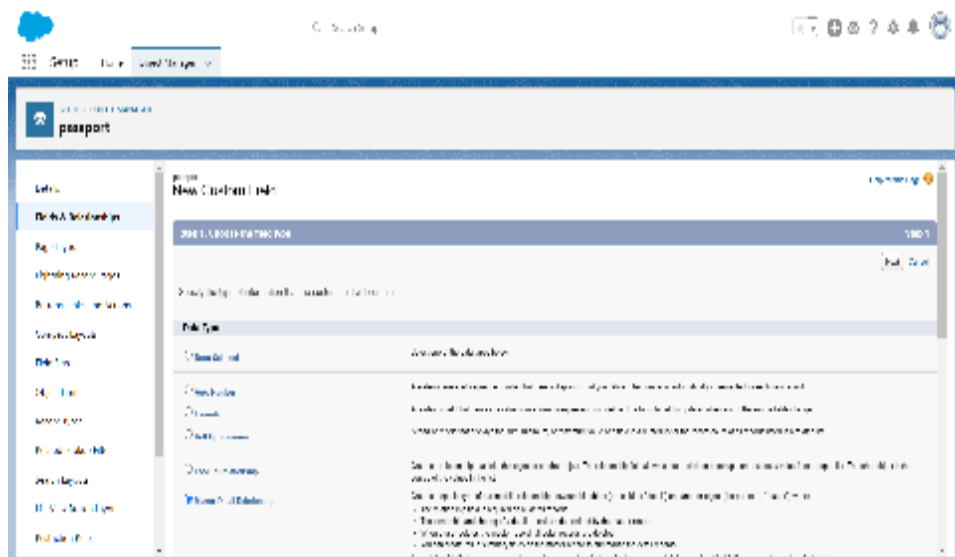
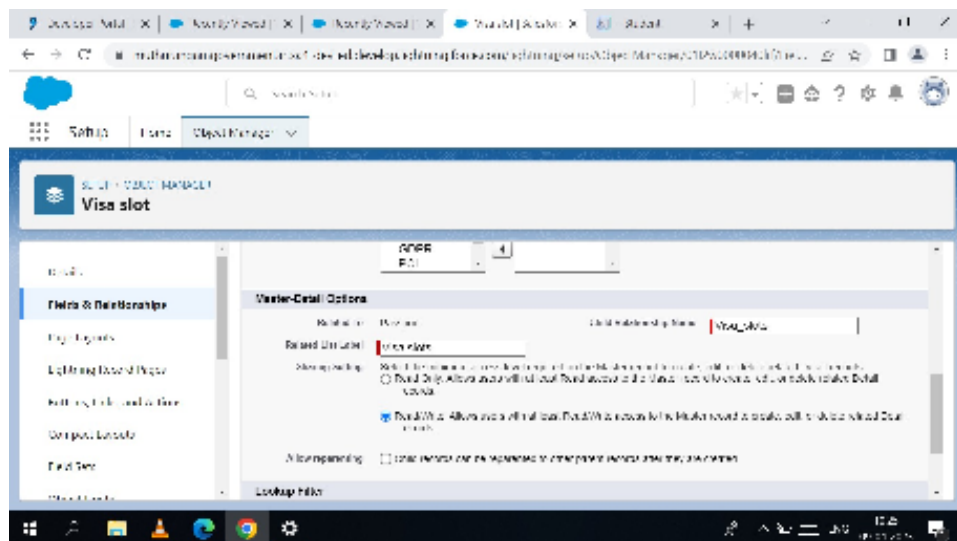
Creation of Relationship:

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
- 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.



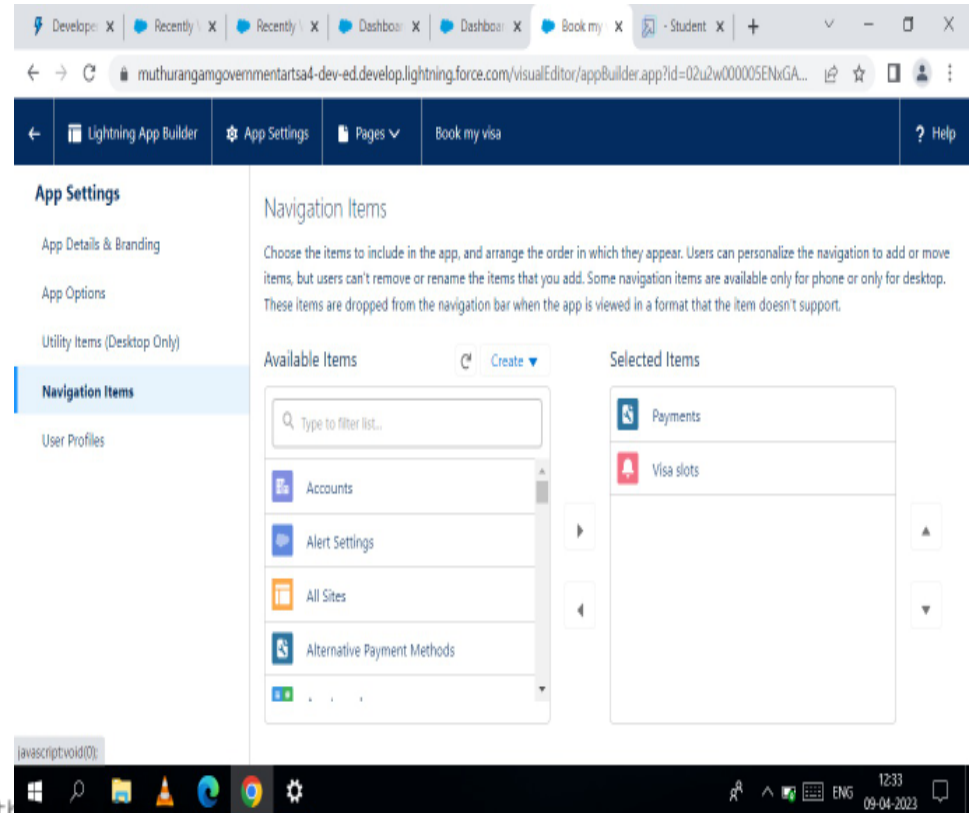
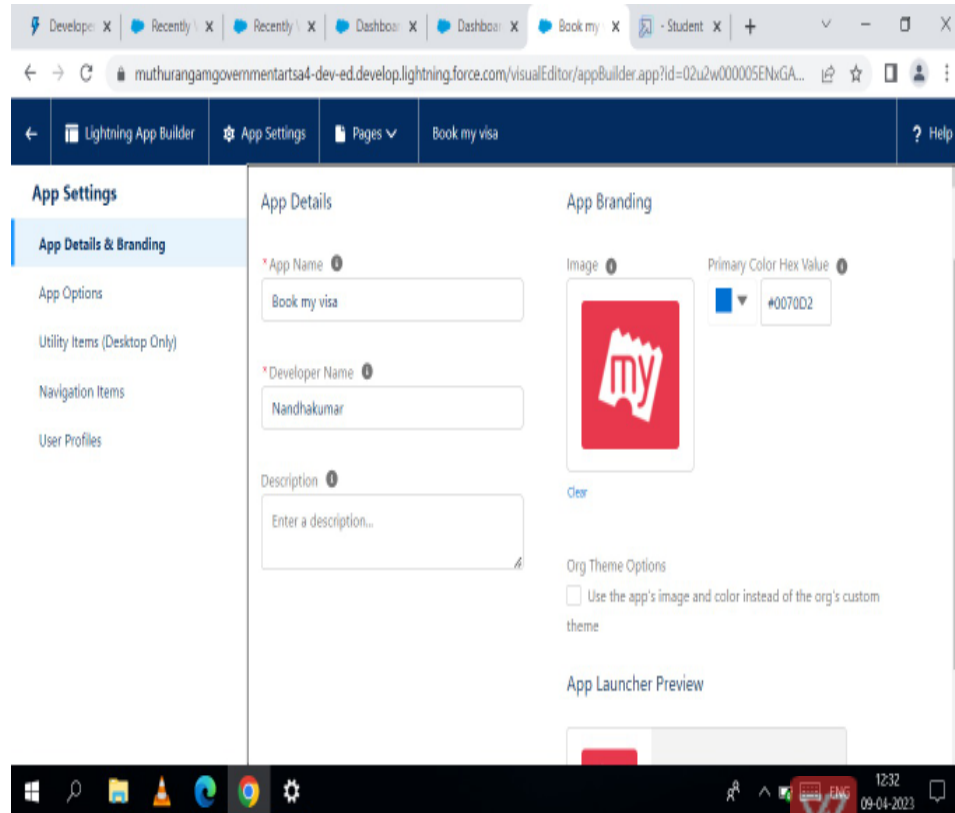
- 7) Select visible for all profiles in field level security and select page layout in next page and save it.



Milestone-4 App:

Creation of App

- 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) Passport, visa slots, payments,reschedule/cancel to selected items.



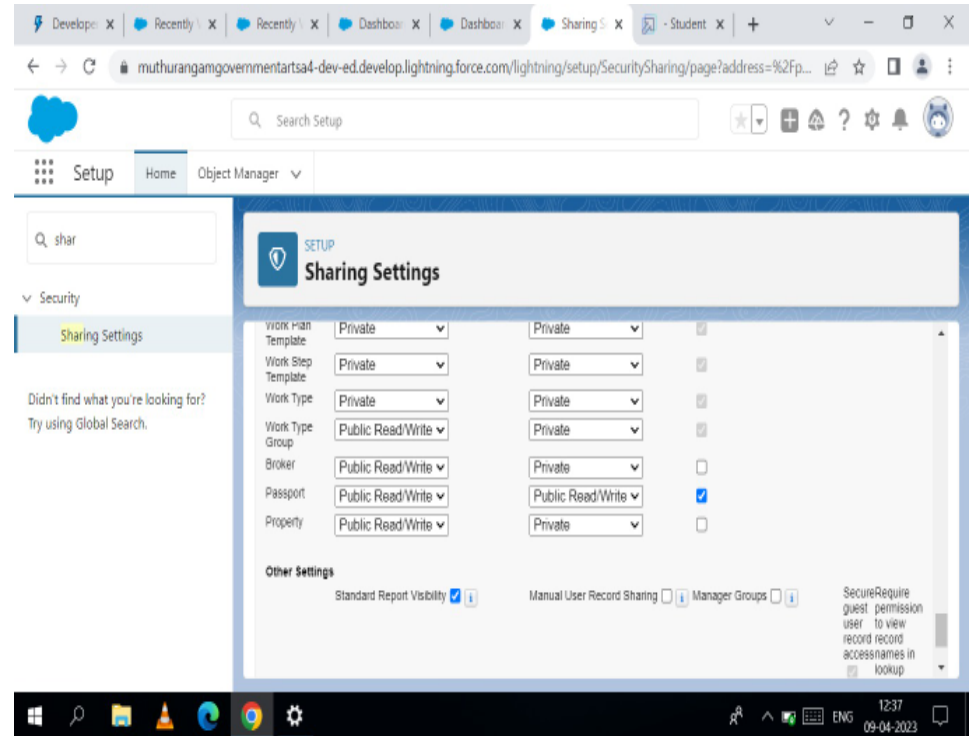
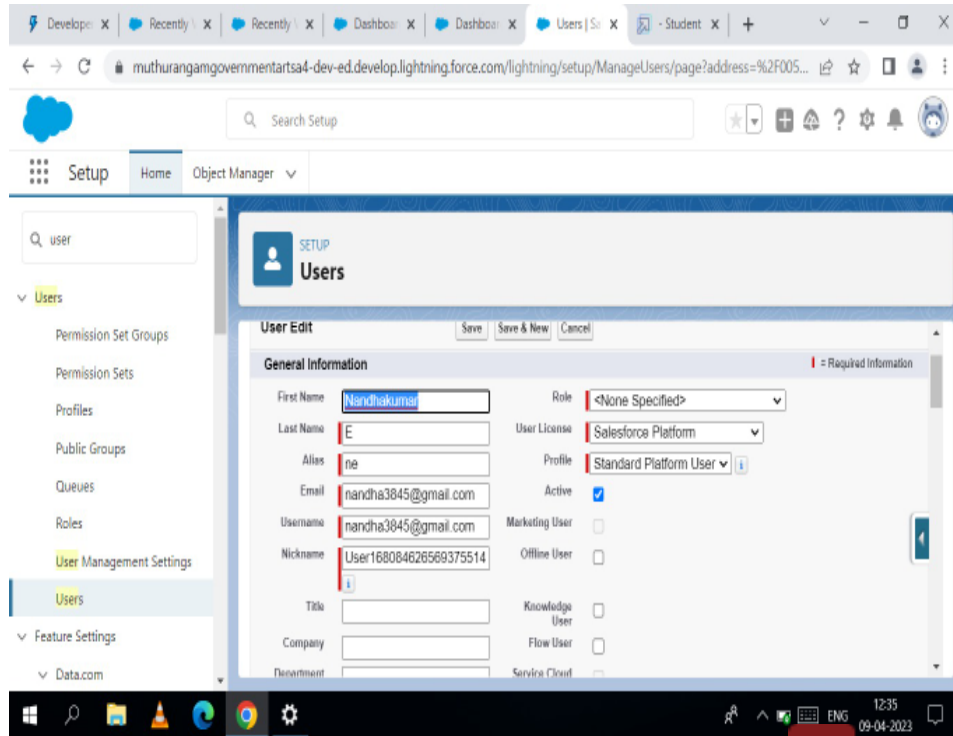
Milestone-5 User:

Creation of User:

- 1) Navigate to setup in quick find search bar
- 2) Type user in and select it and click on new user.

OWD:organization wide default settings:

- 1) Navigate to setup in quick find search bar
- 2) Type sharing settings and you will navigate to the sharing settings page
- 3) And click edit on the owd.
- 4) Navigate to the bottom of the page and select the passport object.
- 5) And change the default external access to public/Read/write.



Milestone-6 Reports:

Creation of report

- 1) Click on the app launcher and search for reports
- 2) Select new report and select passport with visa slots for the report type name.
- 3) Select the start button to create a new report.
- 4) And in the passport created date select all time.
- 5) And give the label name Passports with visa locations.
- 6) Click on save and run for saving the report.

The screenshot displays the Salesforce Lightning Reports interface. At the top, there's a navigation bar with tabs for 'Developer', 'Recently', 'Dashboard', and 'Passports'. The main header includes a search bar and navigation links for 'Sales', 'Home', 'Opportunities', 'Leads', 'Tasks', 'Files', 'Accounts', 'Contacts', 'Campaigns', 'Reports', and 'More'. The report title is 'Passports with Visa slots Report'. Below the title, there's a table with columns for 'Location', 'Passport: Passport Number', and several numeric columns representing different passport numbers, along with a 'Total' column. The table data shows record counts for Chennai, Hyderabad, Madurai, and Mumbai. Below the table, there's a 'Details (6 Rows)' section with a table showing 'Visa slot: Visa slot Number' and corresponding values. At the bottom, there are toggle switches for 'Row Counts', 'Detail Rows', 'Grand Total', and 'Stacked Summaries'.

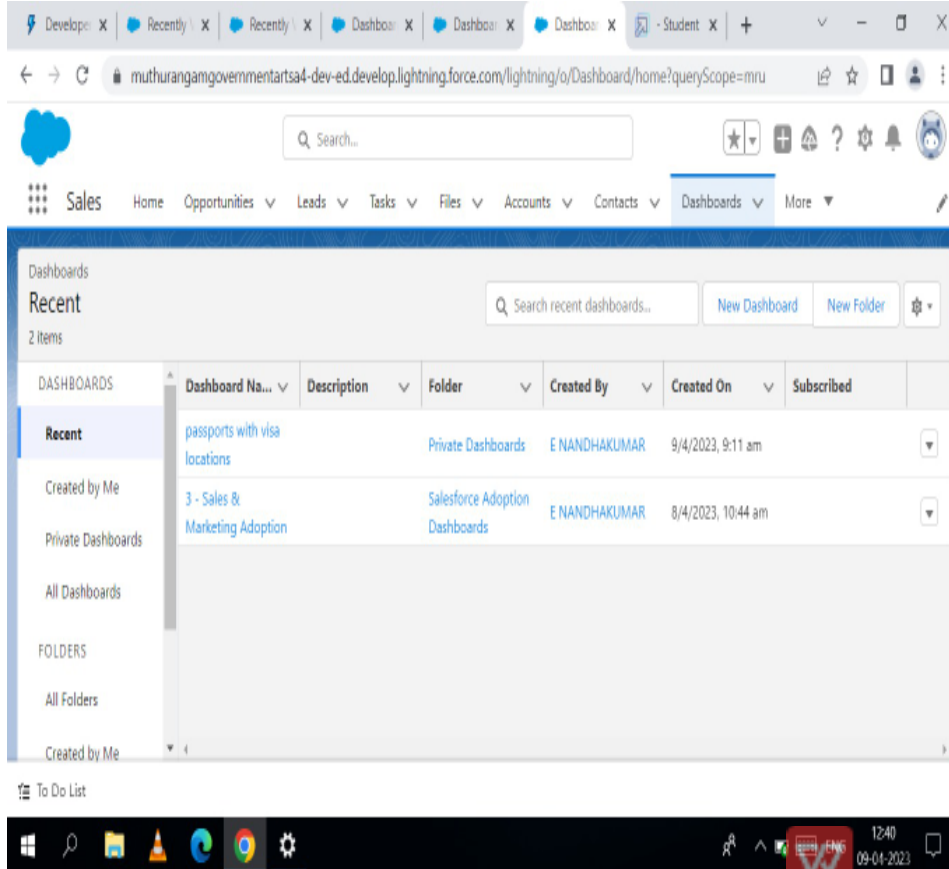
| Location | Passport: Passport Number | 2645b | 34567f | 3678g | 3789j | 6754j | 9876e | Total |
|------------------------------------|---------------------------|-------|--------|-------|-------|-------|-------|-------|
| <input type="checkbox"/> Chennai | Record Count | 0 | 0 | 0 | 1 | 1 | 0 | 2 |
| <input type="checkbox"/> Hyderabad | Record Count | 0 | 0 | 0 | 0 | 0 | 1 | 1 |
| <input type="checkbox"/> Madurai | Record Count | 1 | 0 | 0 | 0 | 0 | 0 | 1 |
| <input type="checkbox"/> Mumbai | Record Count | 0 | 1 | 0 | 0 | 0 | 0 | 1 |

| Visa slot: Visa slot Number |
|-----------------------------|
| 1 V-0003 |
| 2 V-0006 |

Milestone-7 Dashboards:

Creation of Dashboard:

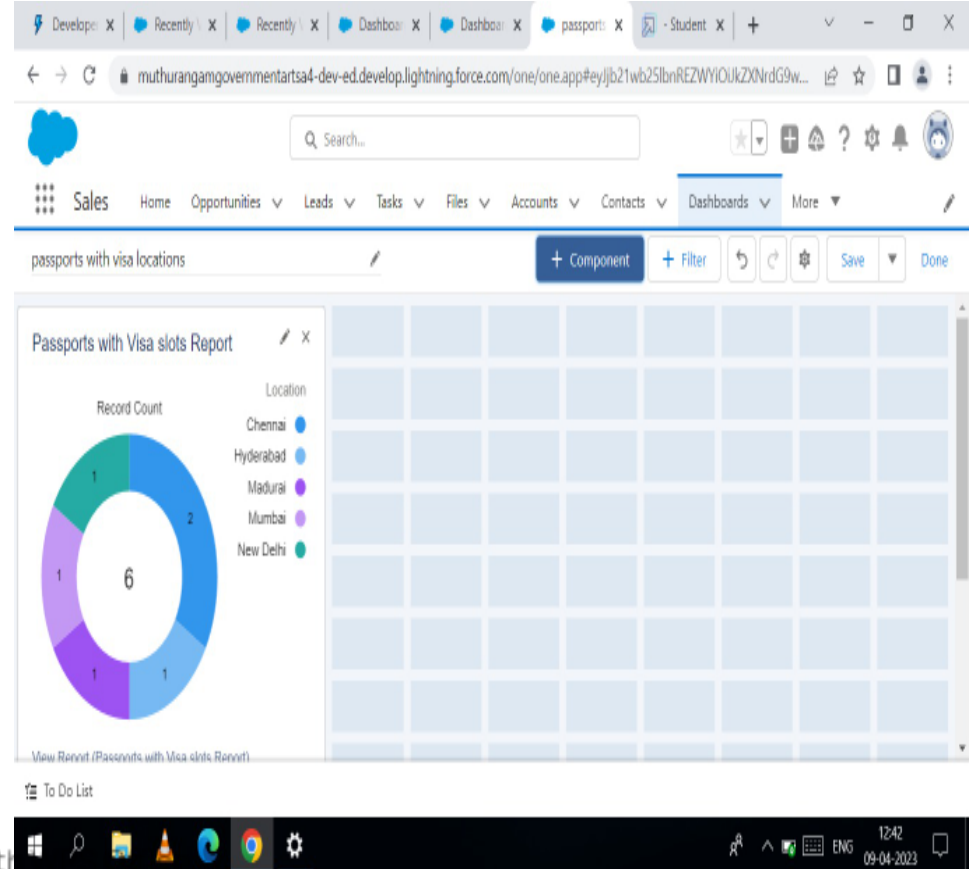
- 1) Click on the app launcher and search for dashboards
- 2) Select the new dashboard option.
- 3) Name the dashboard has a Passport with visa locations



This screenshot shows the Salesforce Dashboards home page. The browser tabs include 'Developer', 'Recently', 'Dashboard', and 'Student'. The URL is 'muthurangamgovernmentartsa4-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mr'. The page features a search bar, navigation tabs (Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Dashboards, More), and a sidebar with 'Dashboards' and 'Recent' sections. The 'Recent' section lists two dashboards:

| DASHBOARDS | Dashboard Name | Description | Folder | Created By | Created On | Subscribed |
|---------------|--------------------------------|-------------|--------------------------------|---------------|--------------------|------------|
| Recent | passports with visa locations | | Private Dashboards | E NANDHAKUMAR | 9/4/2023, 9:11 am | |
| Created by Me | 3 - Sales & Marketing Adoption | | Salesforce Adoption Dashboards | E NANDHAKUMAR | 8/4/2023, 10:44 am | |

The taskbar at the bottom shows the Windows logo, search icon, and various application icons, with the system clock displaying 12:40 on 09-04-2023.

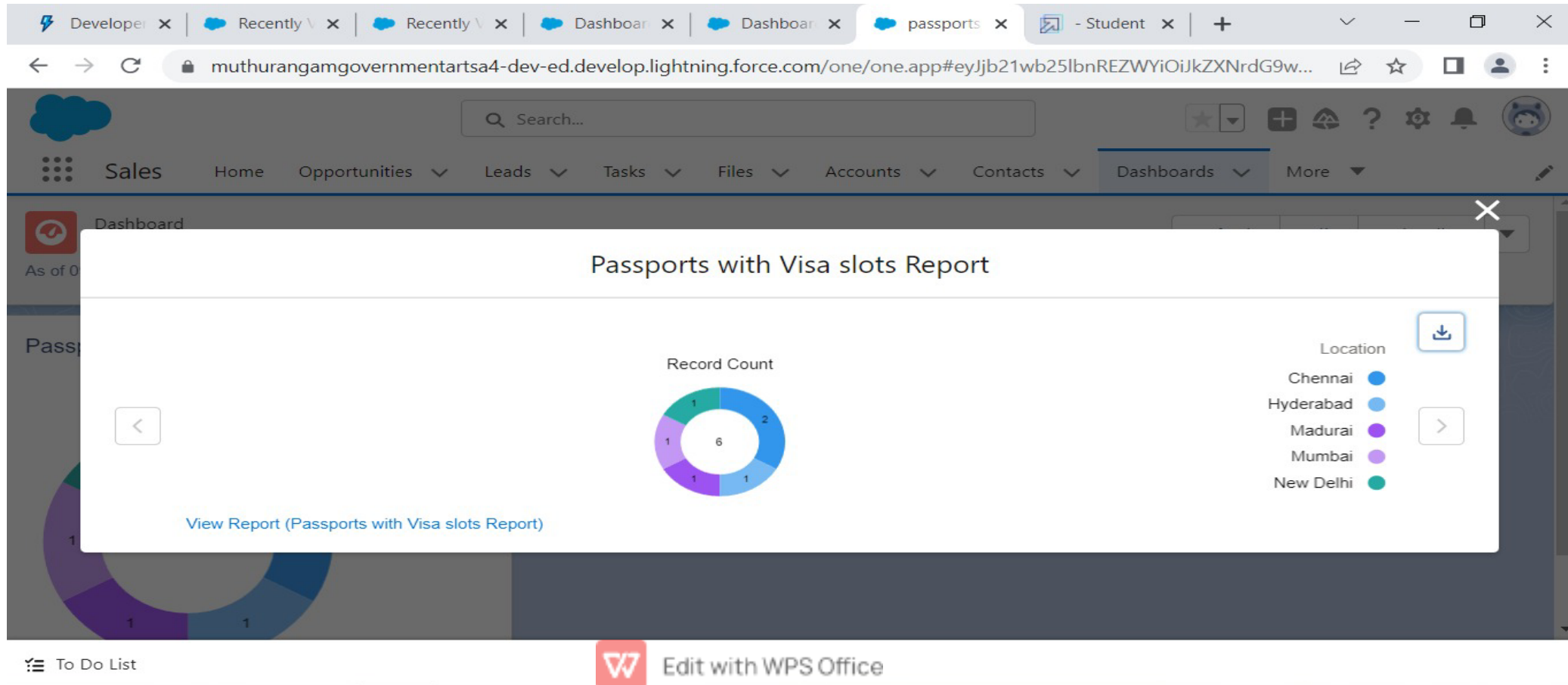


This screenshot shows a Salesforce dashboard titled 'passports with visa locations'. The dashboard includes a donut chart titled 'Passports with Visa slots Report' and a table grid. The donut chart displays the record count for different locations:

| Location | Record Count |
|--------------|--------------|
| Chennai | 1 |
| Hyderabad | 2 |
| Madurai | 1 |
| Mumbai | 1 |
| New Delhi | 1 |
| Total | 6 |

The dashboard also features a table grid with columns for 'Location' and 'Record Count'. The taskbar at the bottom shows the Windows logo, search icon, and various application icons, with the system clock displaying 12:42 on 09-04-2023.

- 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..



END OF THE PROGRAM

OUR SINCERE GRATITUDE TO

- SMART INTERNZ
- SALESFORCE

