

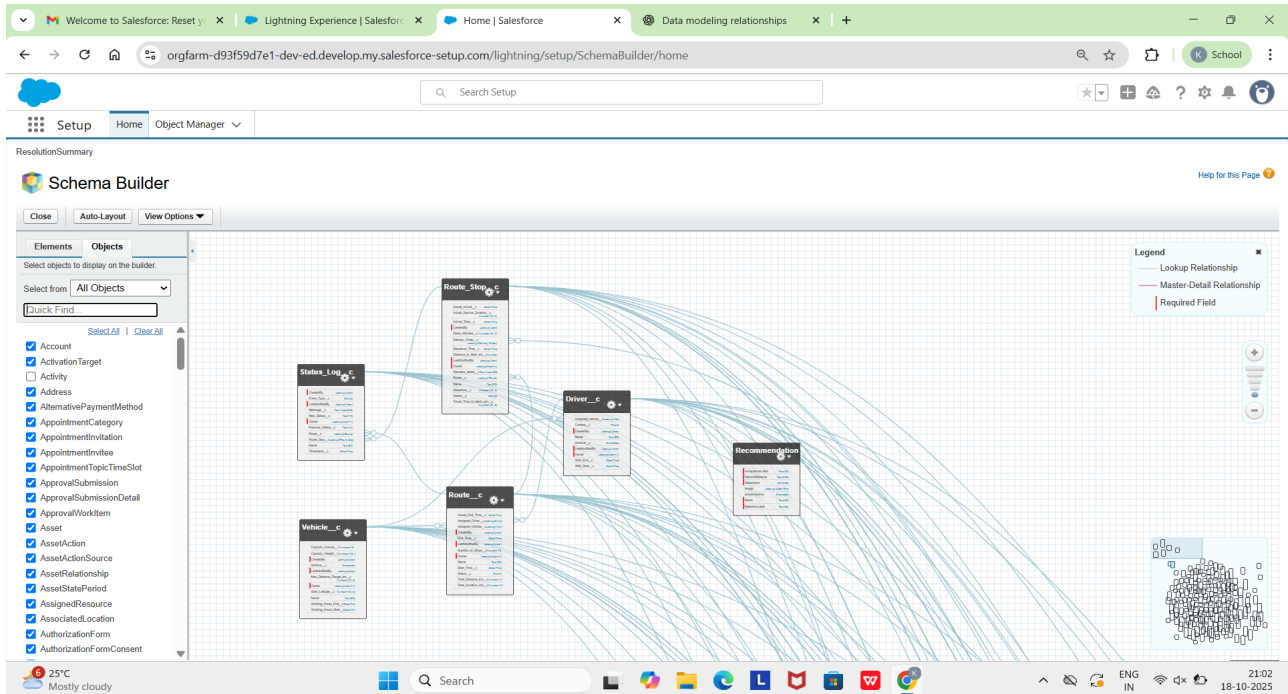
Dynamic Route Optimization

Salesforce-Based Delivery Management System

Phase 3: Automation & Business Logic

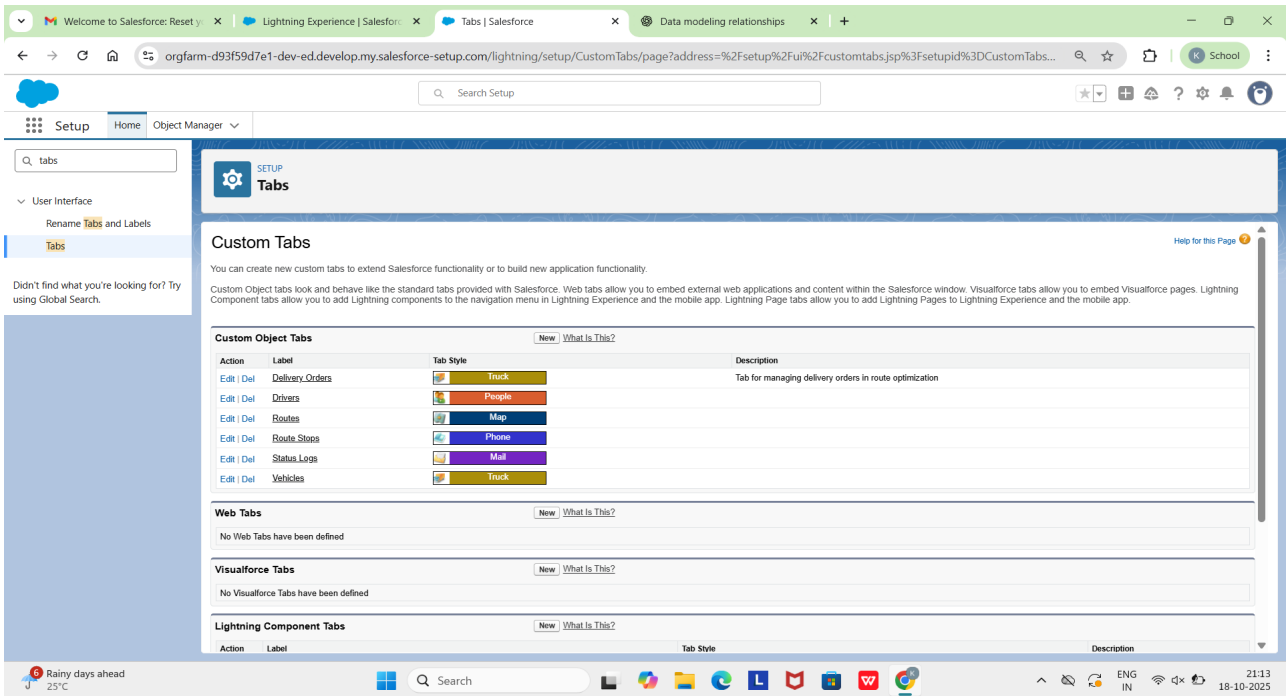
Step 1: Schema Builder Overview

The Schema Builder provides a visual representation of all objects, fields, and relationships in the Salesforce environment. In this project, custom objects such as Delivery Orders, Routes, Route Stops, Vehicles, Drivers, and Status Logs were created and connected using lookup relationships. This ensures seamless data connectivity and enables route tracking and optimization.



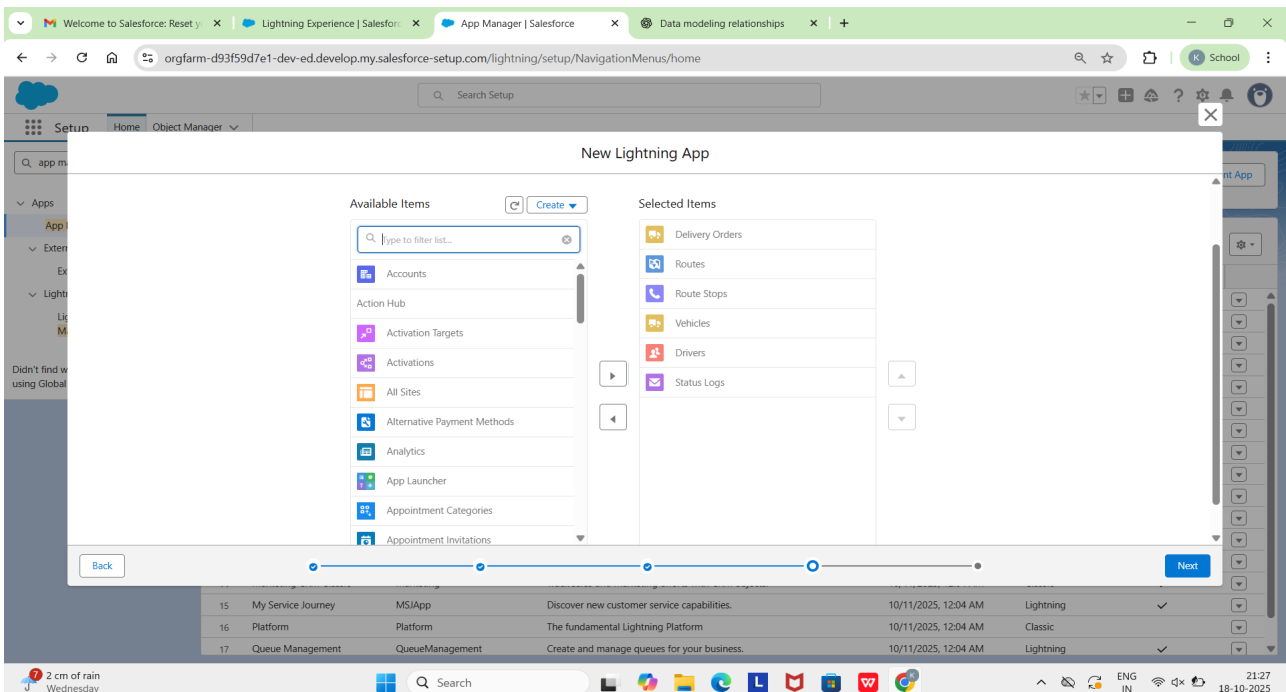
Step 2: Custom Tabs Creation

Custom tabs were created to provide easy navigation to each custom object within the Salesforce app. Tabs such as Delivery Orders, Routes, Route Stops, Vehicles, Drivers, and Status Logs were added to enhance usability.



Step 3: Lightning App Setup

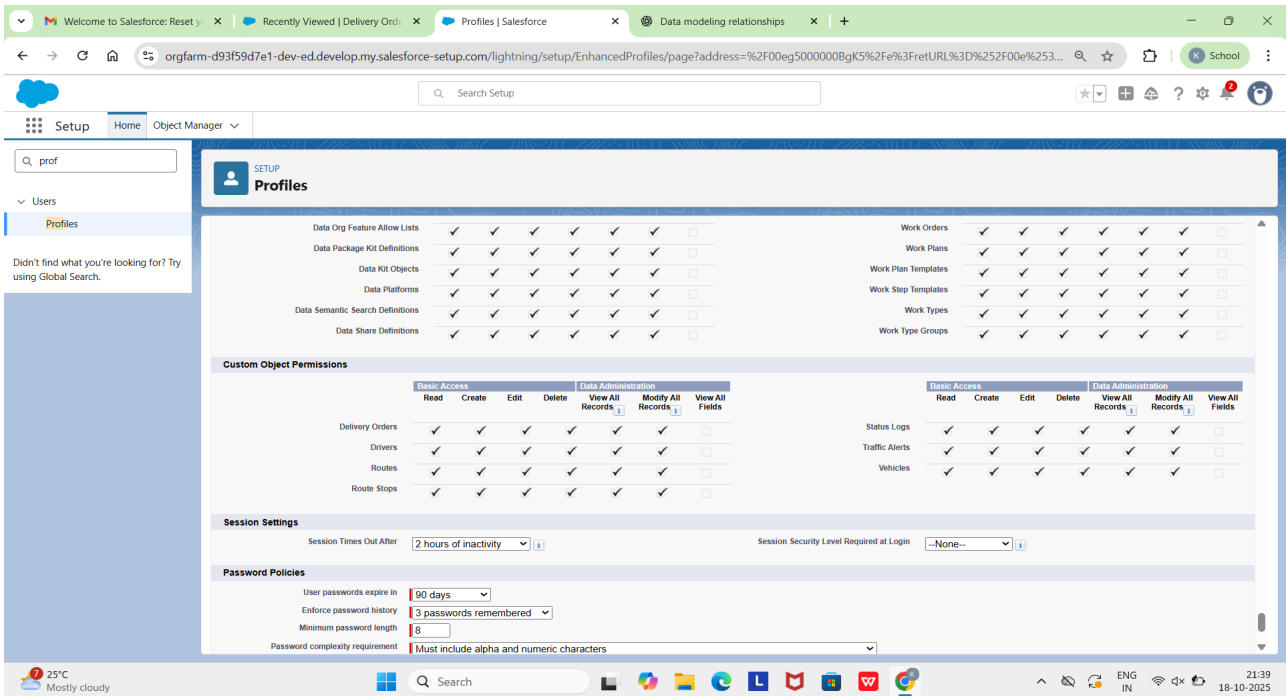
A new Lightning App named 'Dynamic Route Optimization' was created using the App Manager. The app includes navigation items for all primary custom objects, allowing streamlined access to manage routes, vehicles, and delivery orders.



Step 4: Profiles and Permission Management

Profiles were configured to manage object-level and field-level access for different roles such as Admin, Dispatcher, and Driver. Each profile specifies permissions like Read, Create, Edit, and

Delete for custom objects. Password policies and session timeouts were also enforced for security compliance.



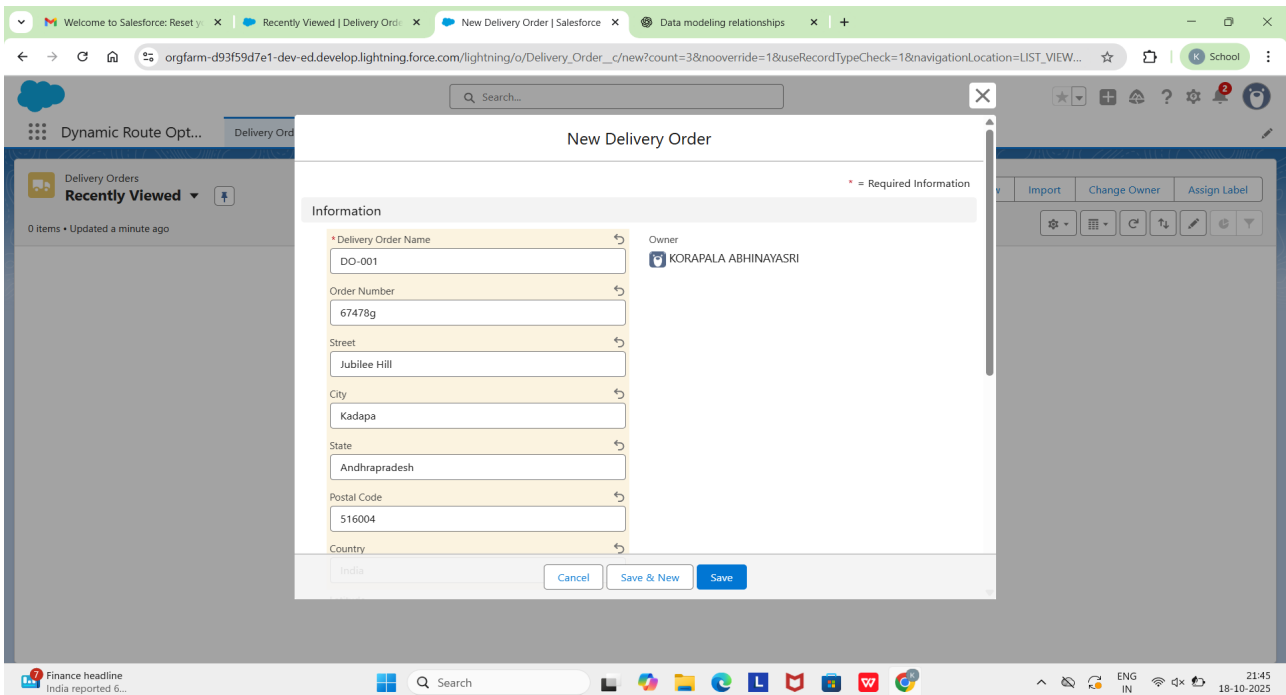
The screenshot shows the Salesforce Setup interface for the 'Profiles' page. The left sidebar contains a search bar with 'prof' and a list of navigation items: Users, Profiles, and a search result for 'prof'. The main content area is titled 'SETUP Profiles' and contains several sections:

- Data Org Feature Allow Lists:** A table with columns for various features and checkboxes for enabling/disabling them.
- Custom Object Permissions:** A table with columns for 'Basic Access' (Read, Create, Edit, Delete) and 'Data Administration' (View All Records, Modify All Records, View All Fields) for various objects like Delivery Orders, Drivers, Routes, Route Stops, Status Logs, Traffic Alerts, and Vehicles.
- Session Settings:** A section for configuring session timeouts and security levels.
- Password Policies:** A section for configuring password expiration, history, and complexity requirements.

The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 21:39 on 18-10-2025.

Step 5: Record Creation Examples

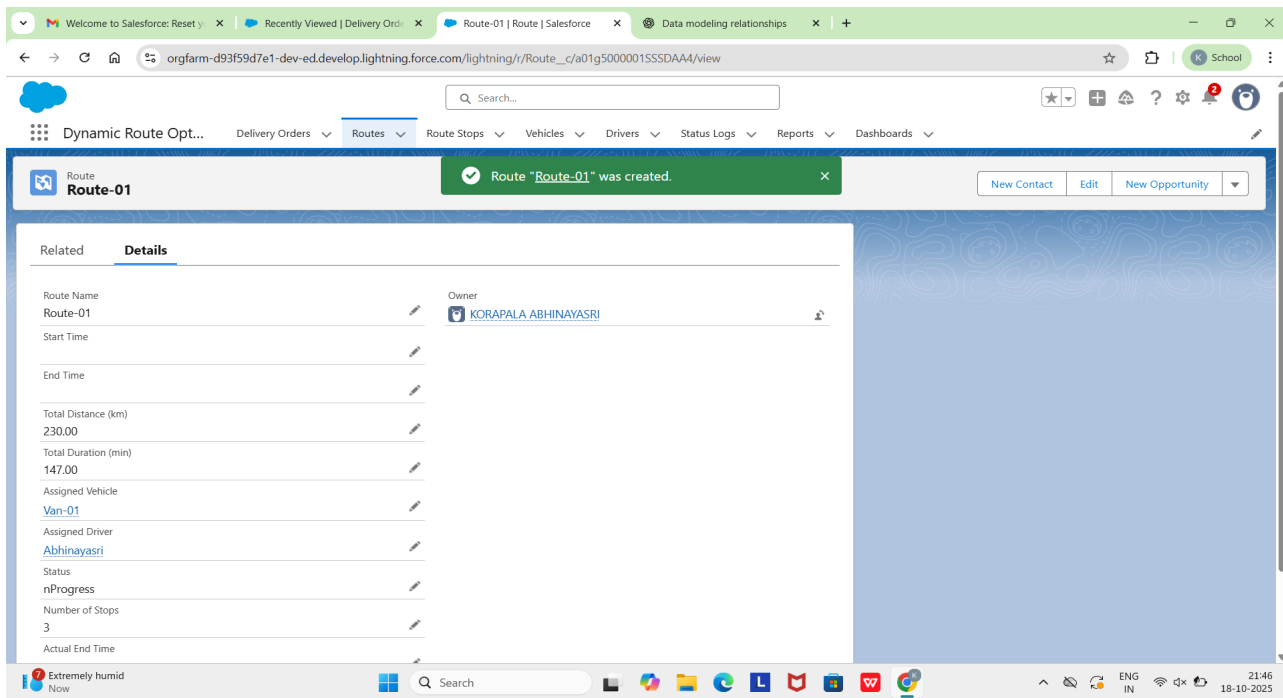
Sample records were created to validate object relationships and workflow triggers. For instance, a new Delivery Order record was created with address and timing details. Similarly, a Route record was created linking driver and vehicle information.



The screenshot shows the 'New Delivery Order' form in Salesforce. The form is titled 'New Delivery Order' and has a 'Delivery Orders' tab selected. The form contains the following fields:

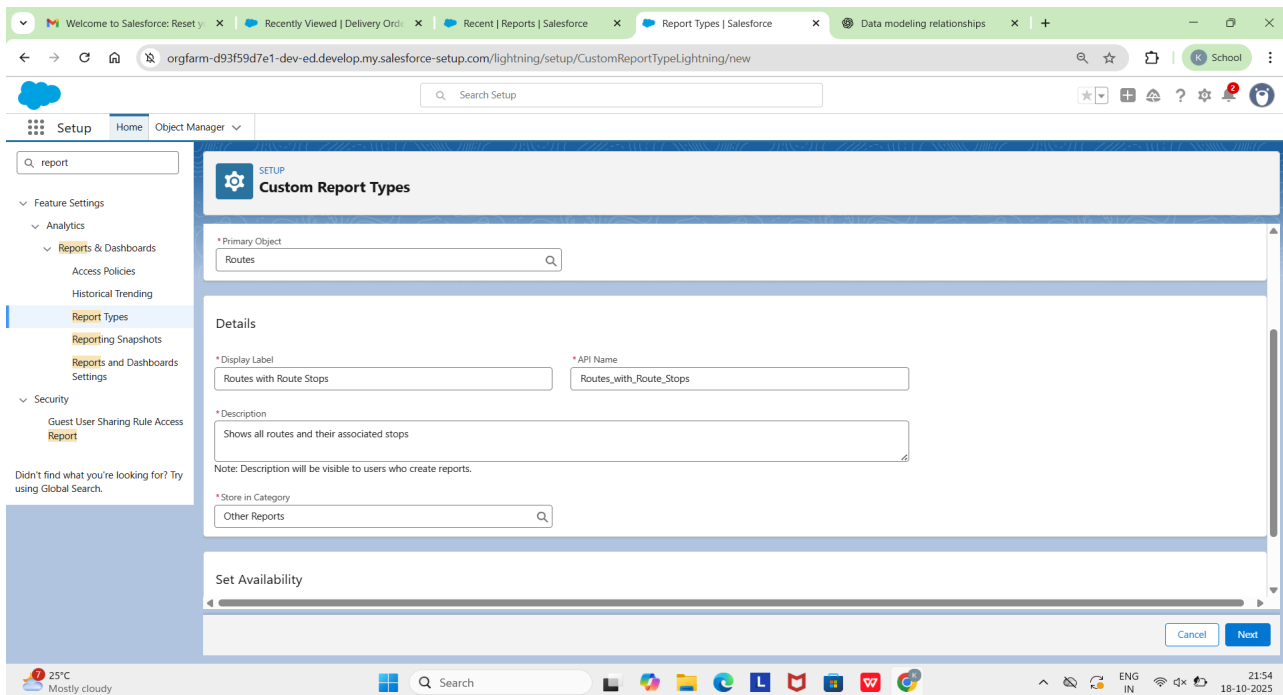
- Delivery Order Name:** DO-001
- Order Number:** 67478g
- Street:** Jubilee Hill
- City:** Kadapa
- State:** Andhrapradesh
- Postal Code:** 516004
- Country:** India

The form also includes a 'Owner' field with the value 'KORAPALA ABHINAVASRI'. The bottom of the screen shows a Windows taskbar with various application icons and a system clock indicating 21:45 on 18-10-2025.



Step 6: Custom Report Types

A custom report type was created under Setup → Reports & Dashboards → Report Types. The report 'Routes with Route Stops' allows generating combined data insights to monitor route efficiency and stop performance.



Step 7: Automation Tools Overview

Automation tools such as Workflow Rules, Process Builder, and Flows are essential to streamline operations. In this phase, triggers can be used to automatically update Route status when all

associated Route Stops are marked as Completed. Flows may also be introduced to assign drivers dynamically based on route capacity and priority.

Conclusion

In Phase 3 of the Dynamic Route Optimization project, Salesforce automation and app configuration were implemented. The creation of custom tabs, a Lightning App, and schema design ensured better navigation and data integrity. Profiles and permission sets reinforced security and access control. Additionally, the configuration of reports and planned automation workflows set the foundation for efficient delivery management within Salesforce.