

NAAN MUDHALVAN

SALESFORCE PROJECT REPORT

**COLLEGE: SCAD COLLEGE OF ENGINEERING AND
TECHNOLOGY**

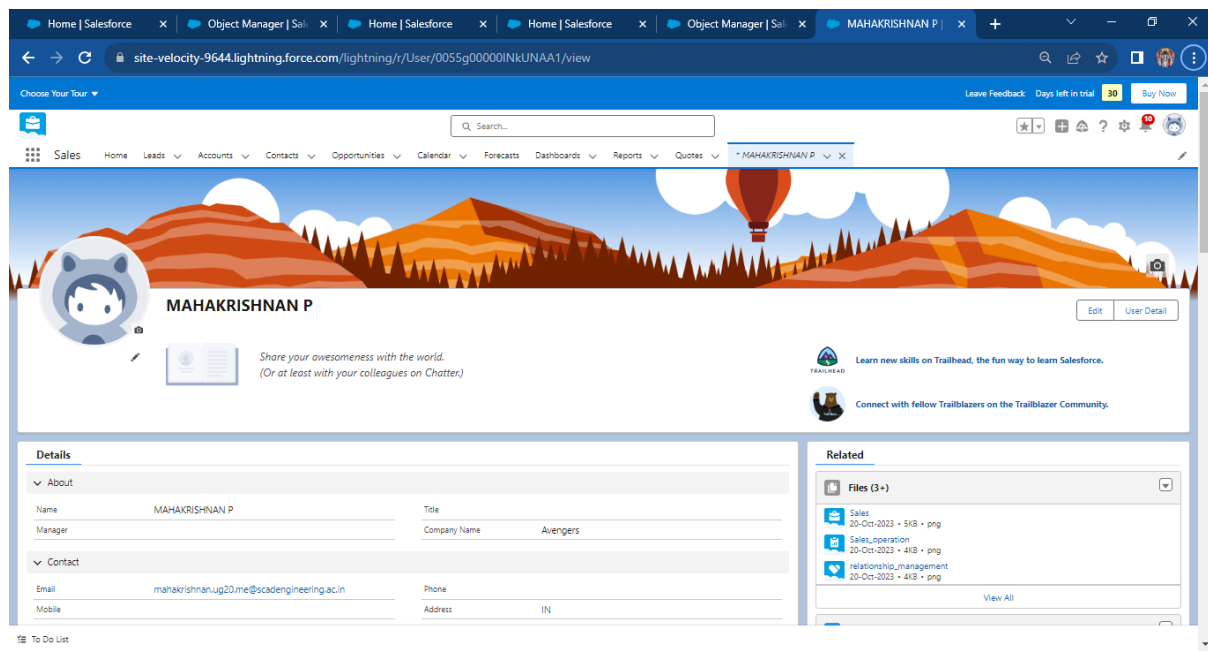
**PROJECT TITLE: VEHICLE MANAGEMENT SYSTEM USING
SALESFORCE**

NAME	NM ID	REG.NO
MAHA KRISHNAN.P	241032559D20B94B2514C816F9AB58C7	953820114009
JEROM.J	8675A336275D77985AD48328E854653E	952820114321
VINOTH MARIYADOSS.A	D26F81081ECD3038B2A4C9863D70A4D5	952820114363
ABRAHAM MUTHAIAH.T	6F4151CE21056DE925A484AEA869E051	952820114303

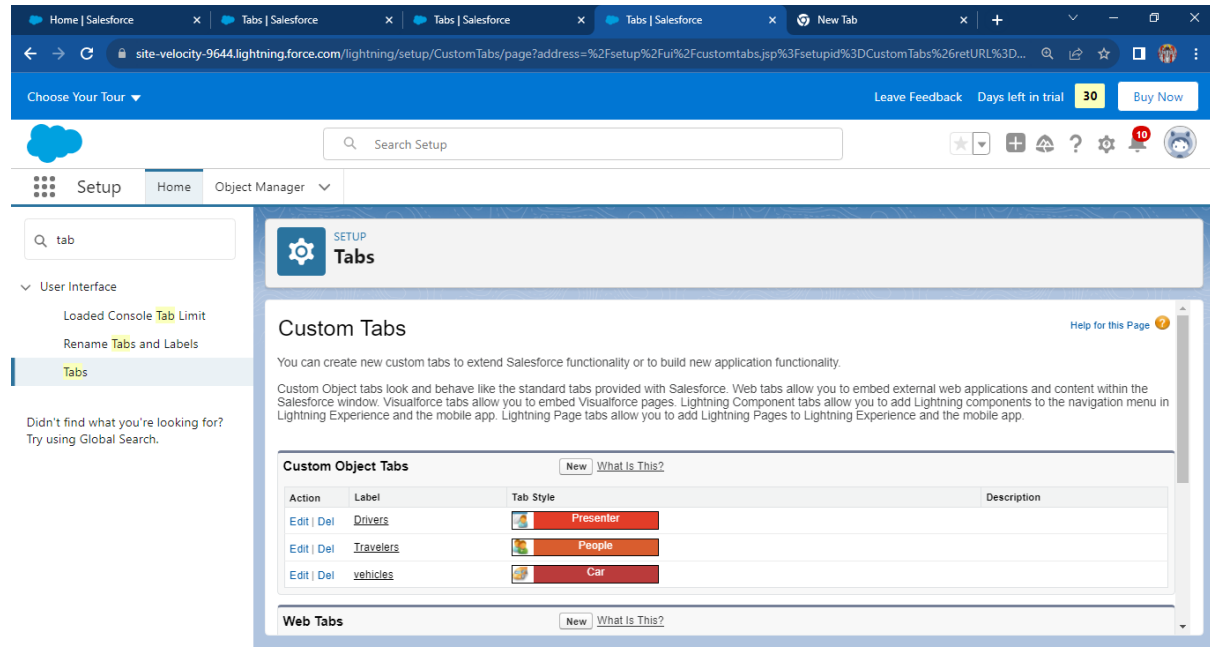
PROJECT FLOW:

In this project you can do hands on practice the configuration as well customization with the data modeling, App building , User adoption & Apex code

Milestone 1: Creation of Developer Account



Milestone 2: Object Creation



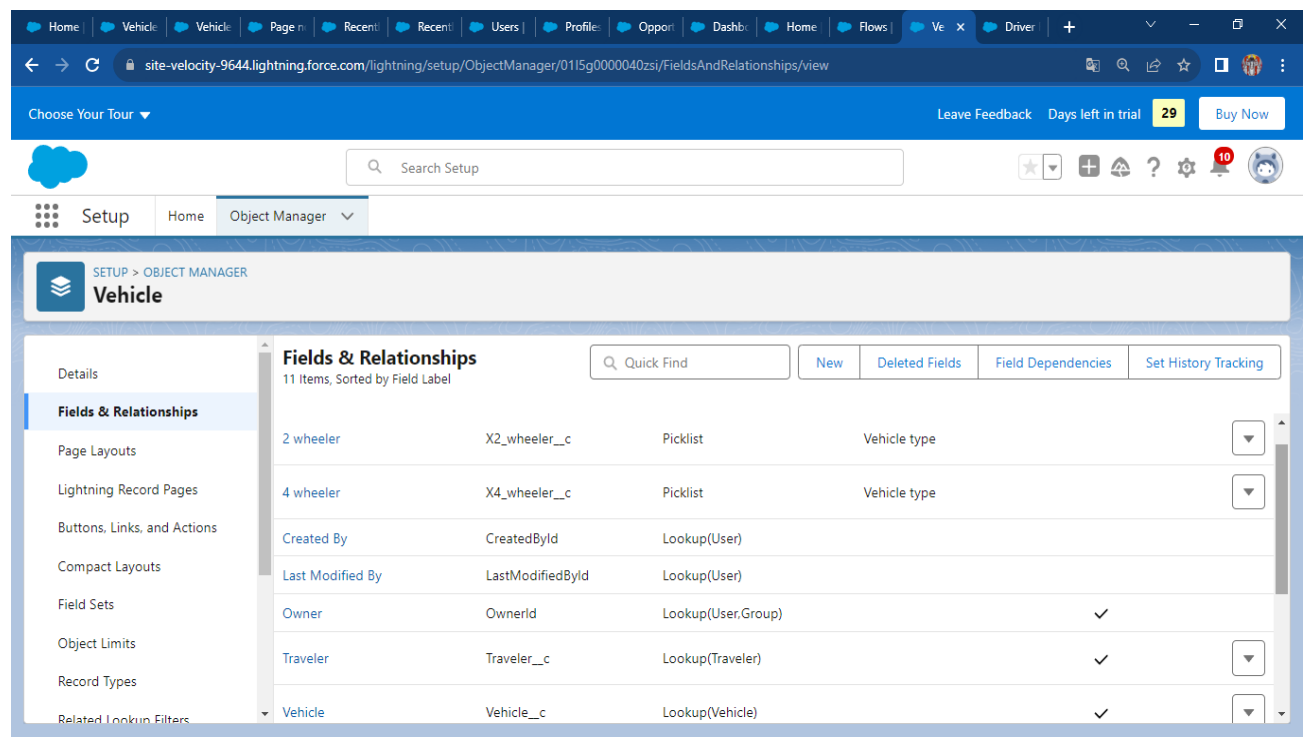
The screenshot shows the Salesforce Setup interface for Custom Tabs. The left sidebar includes a search bar with 'tab' entered and a list of categories: User Interface, Loaded Console Tab Limit, Rename Tabs and Labels, and Tabs (selected). The main content area is titled 'Custom Tabs' and includes a description: 'You can create new custom tabs to extend Salesforce functionality or to build new application functionality. Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.'

Below the description, there are two sections: 'Custom Object Tabs' and 'Web Tabs'. The 'Custom Object Tabs' section has a 'New' button and a 'What Is This?' link. It contains a table with the following data:

Action	Label	Tab Style	Description
Edit Del	Drivers	Presenter	
Edit Del	Travelers	People	
Edit Del	vehicles	Car	

The 'Web Tabs' section also has a 'New' button and a 'What Is This?' link.

Milestone 3: Fields & Relationship



The screenshot shows the Salesforce Setup interface for Fields & Relationships. The left sidebar includes a search bar with 'Search Setup' and a list of categories: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Fields & Relationships' and includes a 'Quick Find' search bar. It contains a table with the following data:

Field Label	Field Name	Field Type	Relationship	Checkmark
2 wheeler	X2_wheeler__c	Picklist	Vehicle type	
4 wheeler	X4_wheeler__c	Picklist	Vehicle type	
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Traveler	Traveler__c	Lookup(Traveler)		✓
Vehicle	Vehicle__c	Lookup(Vehicle)		✓

Milestone 4: Page Layout

The screenshot shows the Salesforce Setup interface for configuring the Opportunity page layout. The left sidebar lists various setup options, with 'Page Layouts' selected. The main content area displays the 'Opportunity Layout' configuration. A table lists fields to be added to the layout, including 'Section', 'Blank Space', 'Account Name', 'Amount', 'Budget Confirmed', 'Close Date', 'Contract', 'Created By', 'Description', 'Discovery Completed', 'Expected Revenue', 'Forecast Category', 'Last Modified By', 'Lead Source', 'Loss Reason', 'Next Step', 'Opportunity Name', 'Opportunity Owner', 'Price Book', 'Primary Campaign ...', 'Private', 'Probability (%)', 'Quantity', and 'ROI Analysis Comp...'. Below the table, there is a 'Highlights Panel' section with a text input field for customization.

Fields	Quick Find	Field Name
Section	Budget Confirmed	Description
Blank Space	Close Date	Discovery Completed
Account Name	Contract	Expected Revenue
Amount	Created By	Forecast Category

Milestone 5: Lightning App

The screenshot shows the Salesforce Setup interface for configuring roles. The left sidebar lists various setup options, with 'Roles' selected. The main content area displays the 'Role Edit' configuration for the 'Vehicle manager' role. The configuration includes fields for 'Label', 'Role Name', 'This role reports to', and 'Role Name as displayed on reports'. The 'Opportunity Access' section has two radio buttons: 'Users in this role can view all opportunities associated with accounts that they own, regardless of who owns the opportunities' (selected) and 'Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities'.

Role Edit
Vehicle manager

Role Edit

Label: Vehicle manager

Role Name: Vehicle_manager

This role reports to: <None Specified>

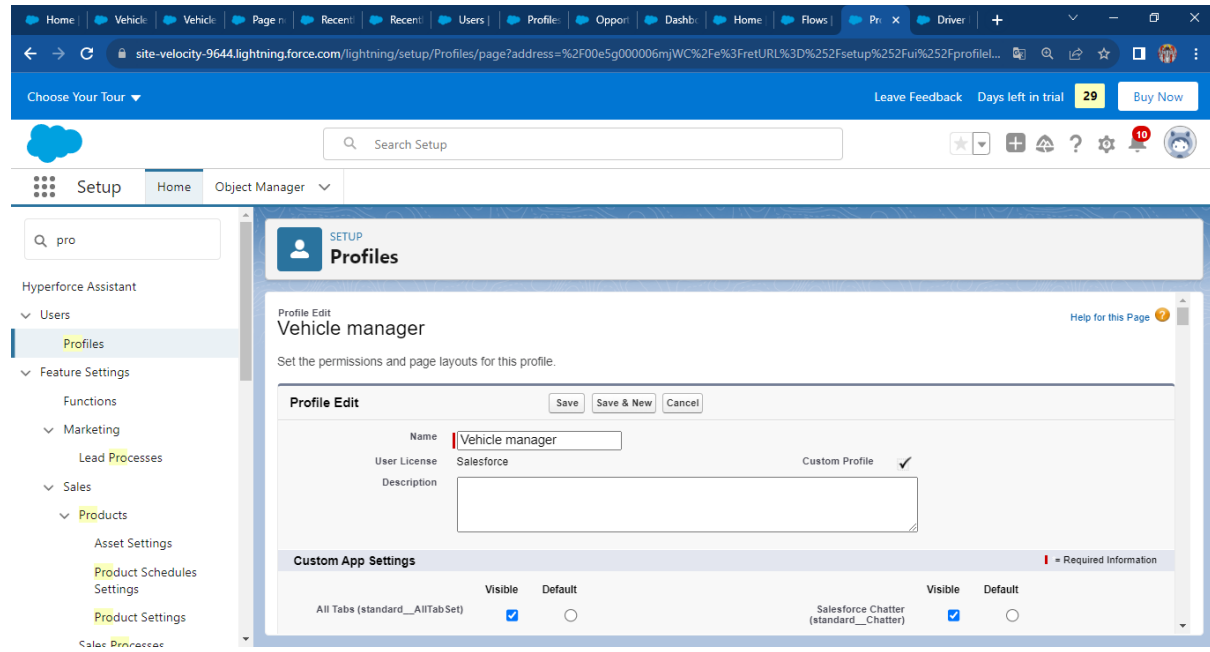
Role Name as displayed on reports:

Opportunity Access:

☐ Users in this role can view all opportunities associated with accounts that they own, regardless of who owns the opportunities

☒ Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities

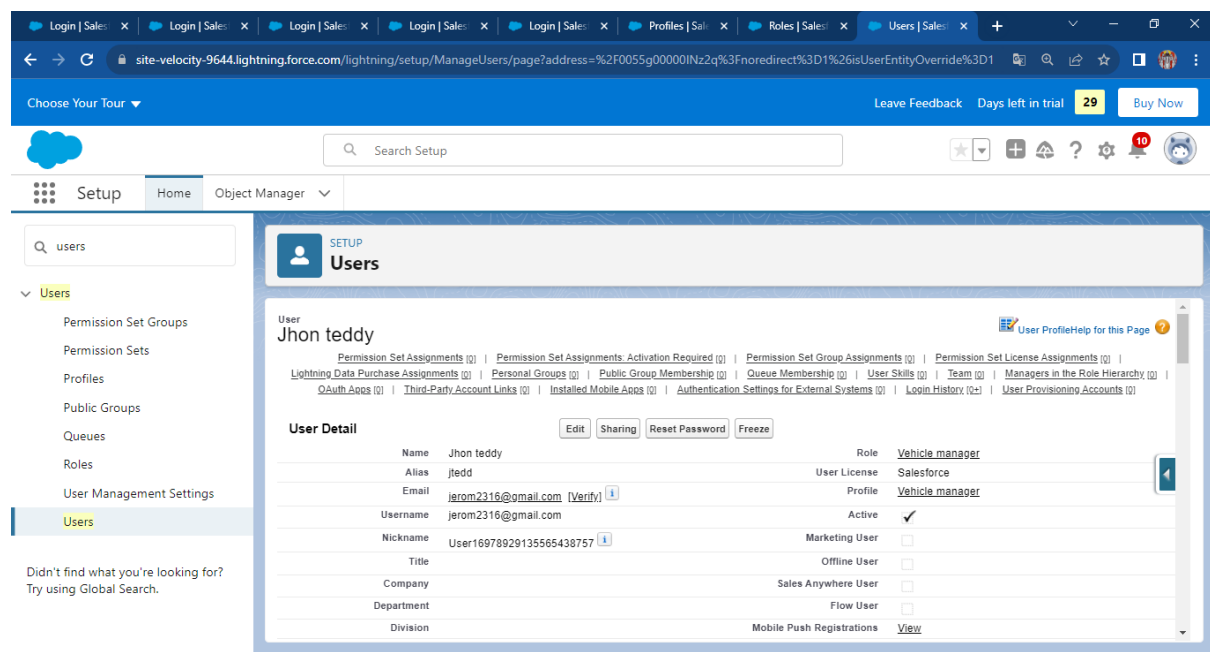
Milestone 6: Profile



The screenshot shows the Salesforce Setup interface for editing a profile. The left sidebar contains a search bar with 'pro' and a navigation menu with categories like Users, Feature Settings, Marketing, Sales, and Products. The main content area is titled 'Profiles' and shows the 'Vehicle manager' profile being edited. The 'Profile Edit' section includes fields for Name, User License, and Description, with a 'Custom Profile' checkbox checked. Below this is the 'Custom App Settings' section, which includes a table for app settings.

App	Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="checkbox"/>

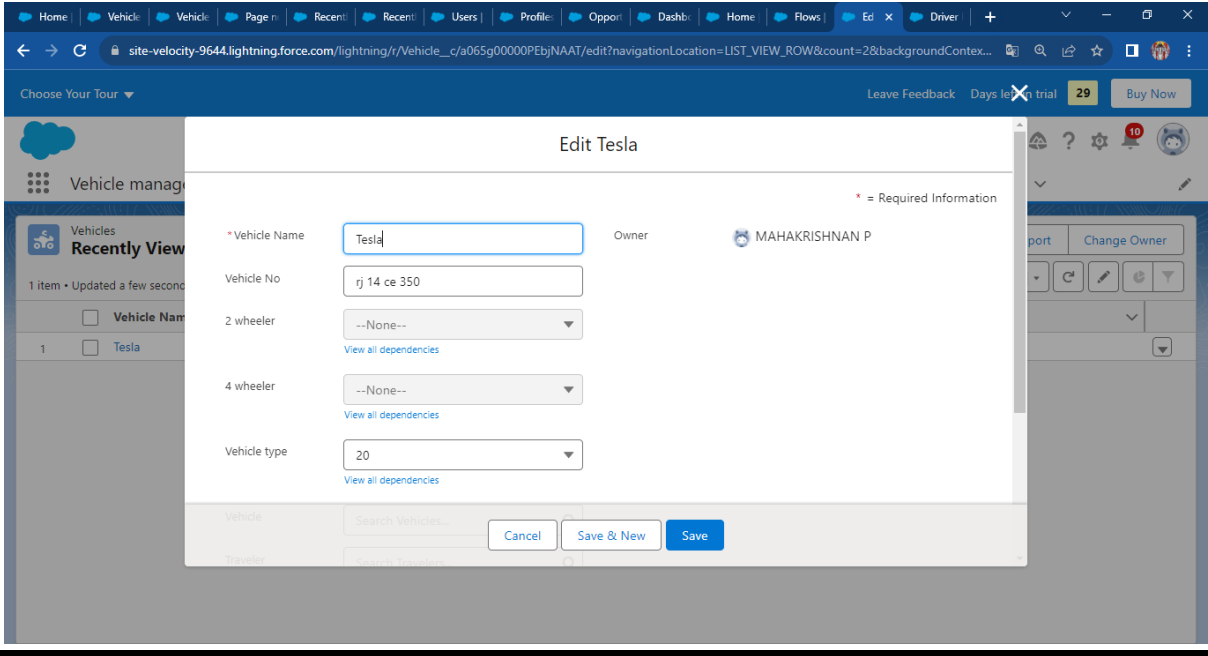
Milestone 7: Users



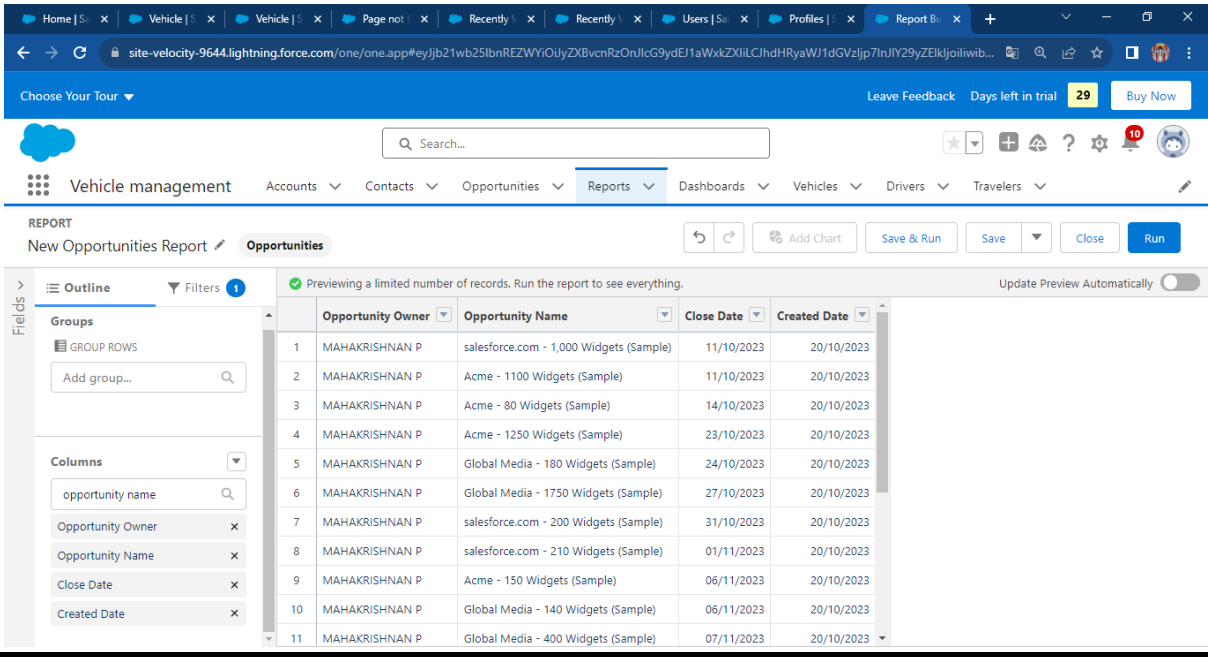
The screenshot shows the Salesforce Setup interface for managing users. The left sidebar contains a search bar with 'users' and a navigation menu with categories like Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, and User Management Settings. The main content area is titled 'Users' and shows the user 'Jhon teddy' being managed. The 'User Detail' section includes a table with user information and a 'User Profile' section with various checkboxes for user settings.

Field	Value
Name	Jhon teddy
Alias	jtedd
Email	jerom2316@gmail.com
Username	jerom2316@gmail.com
Nickname	User16978929135565438757
Title	
Company	
Department	
Division	
Role	Vehicle manager
User License	Salesforce
Profile	Vehicle manager
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Sales Anywhere User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Mobile Push Registrations	View

Milestone 8: User Adoption



Milestone 9: Reports



Milestone 10: Dashboard

The screenshot shows a Salesforce Lightning Dashboard. The top navigation bar includes a search bar and a 'Dashboard saved' notification. The main content area is titled 'Opportunity Details' and features a table with the following data:

Opportunity...	Opportunity Name	Clo...	Cre...
MAHAKRISH NAN P	salesforce.com - 1,000 Widgets (Sample)	11/11	20/10
MAHAKRISH NAN P	Acme - 1100 Widgets (Sample)	11/11	20/10
MAHAKRISH NAN P	Acme - 80 Widgets (Sample)	14/11	20/10
MAHAKRISH NAN P	Acme - 1250 Widgets (Sample)	23/11	20/10
MAHAKRISH	Global Media - 180 Widoets	24/11	20/10

Below the table is a 'View Report (Opportunity Details)' link. The dashboard also includes a 'Component' button and a 'Filter' button.

Milestone 11: Approval Process

The screenshot shows the Salesforce Flow Builder interface. The main screen is titled 'Edit Screen' and displays the 'Driver Flow' screen. The screen contains the following fields:

- Driver Name
- Licence No
- Mobile No

The 'Components' panel on the left shows a list of components, including 'Input (28)', 'Address', 'Call Script', 'Checkbox', and 'Checkbox Group'. The 'Screen Properties' panel on the right shows the 'Driver Info' (Driver_Info) and options to 'Configure Header' and 'Configure Footer'. The 'Auto-Layout' button is visible at the top of the screen.

Milestone 12: Screen Flow

