



VEHICLE MANAGEMENT SYSTEM USING SALESFORCE

Project Based Experiential Learning Program

Vehicle Management System using Salesforce

Description: Vehicle Management is an application where a customer Details are stored in order to choose cars, bikes and commercial vehicles for travel with in the city. The data which is stored here is further used to remind them if any offers are provided during the seasons and any updates regarding vehicles are sent to them in the form of messages and mails.

Milestone 1: Creation Salesforce 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:

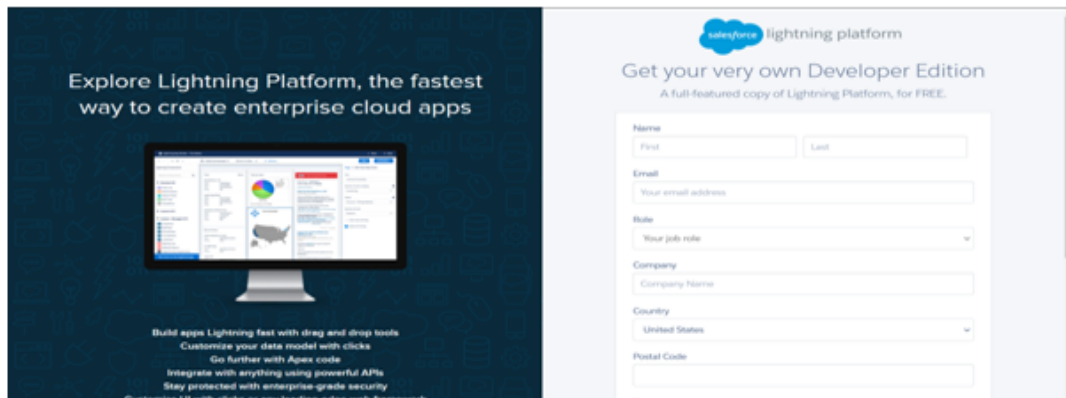
Creating Developer Account

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 :
 - a. First name & Last name
 - a. Email
 - b. Role : Developer

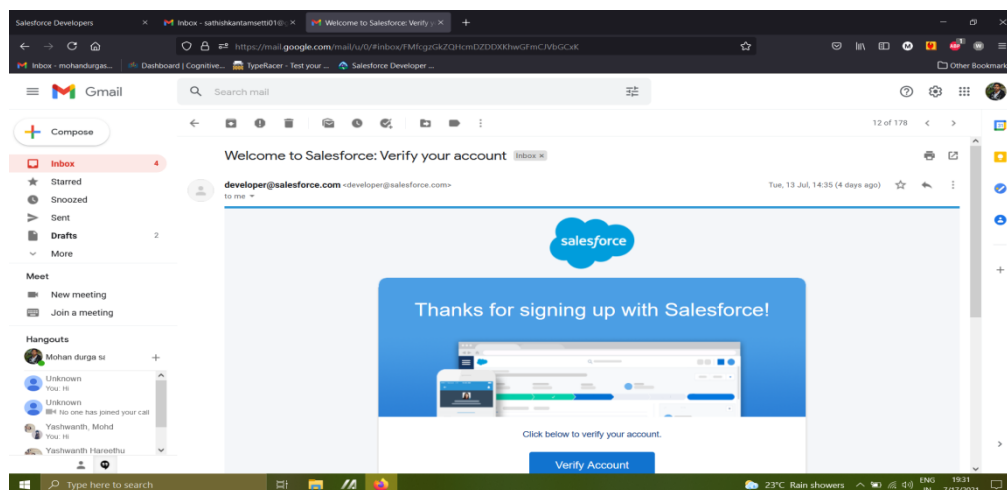
- c. Company : College Name
- d. County : India
- e. Postal Code : pin code
- f. Username : should be a combination of your name and company
This need not be an actual email id, you can give anything in the format :
username@organization.com

Click on sign up after filling these.



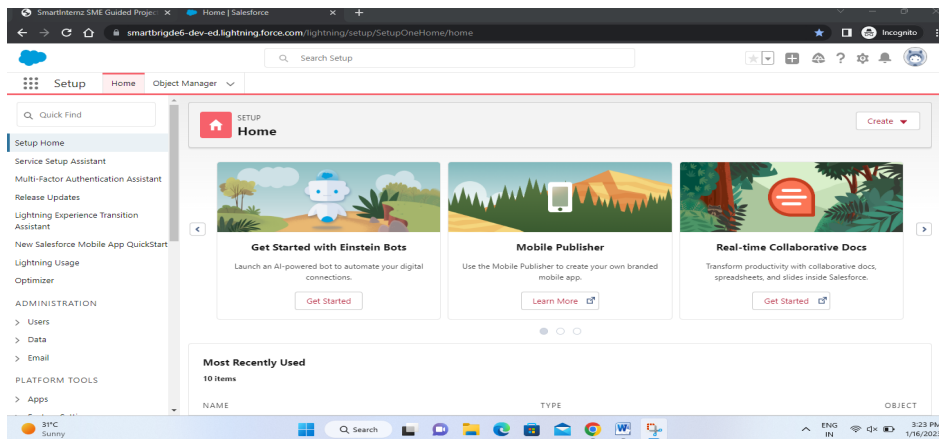
Account Activation

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



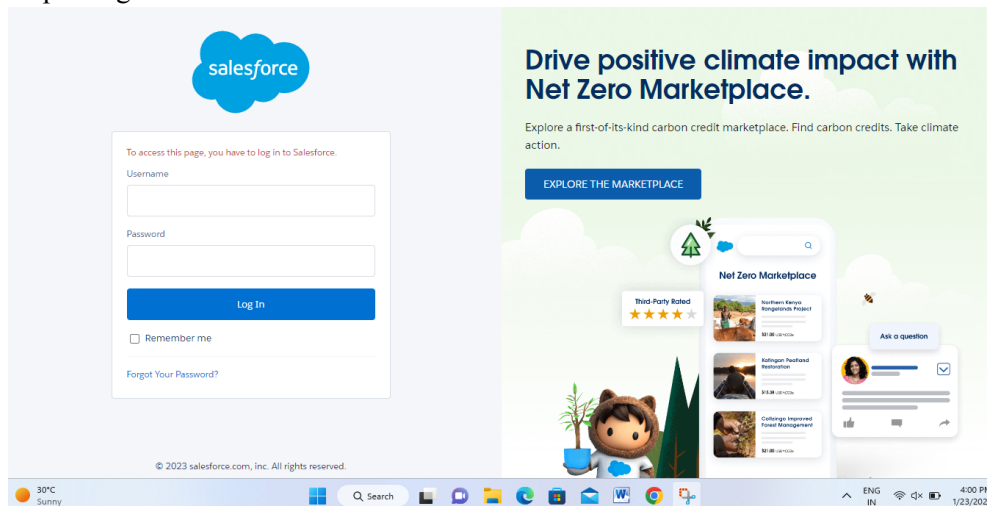
Login To Your Salesforce Account

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:Object

Salesforce objects are database tables that permit you to store data that is specific to an organisation. Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

Standard Objects:Account,Contact,Opportunity.

Custom objects:Vehicles,Drivers.

Activity 1:

To Create an object:

Creation of Objects for Vehicle Management, For this Vehicle Management we need to create 2 objects i.e Vehicles, Driver.

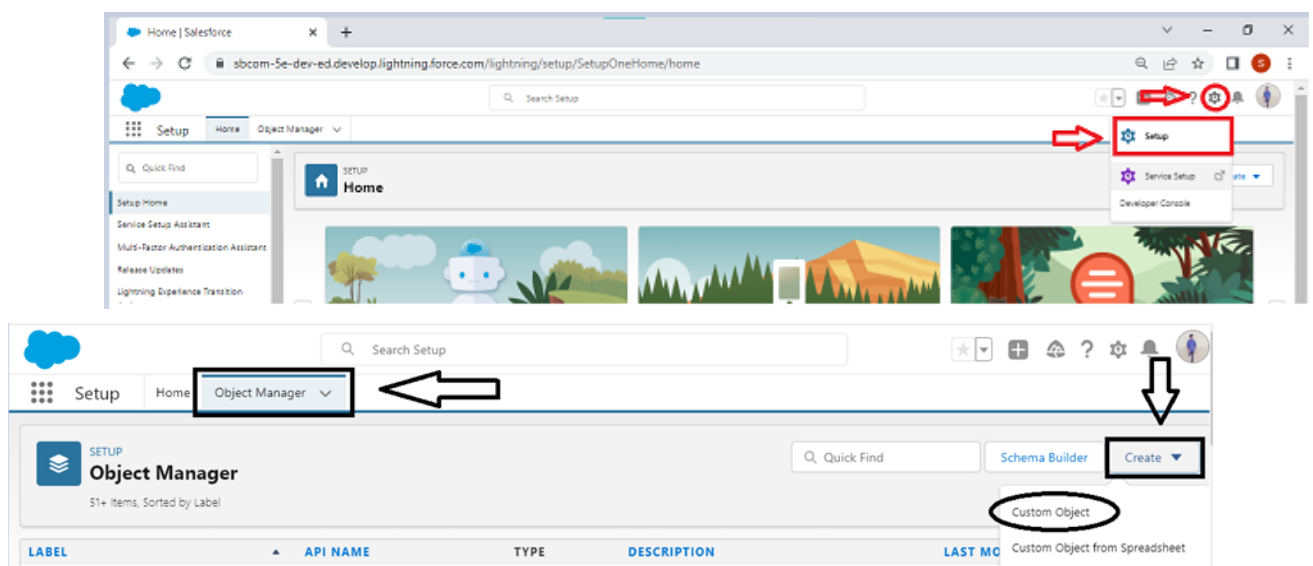
The below steps will assist you in creating those objects.

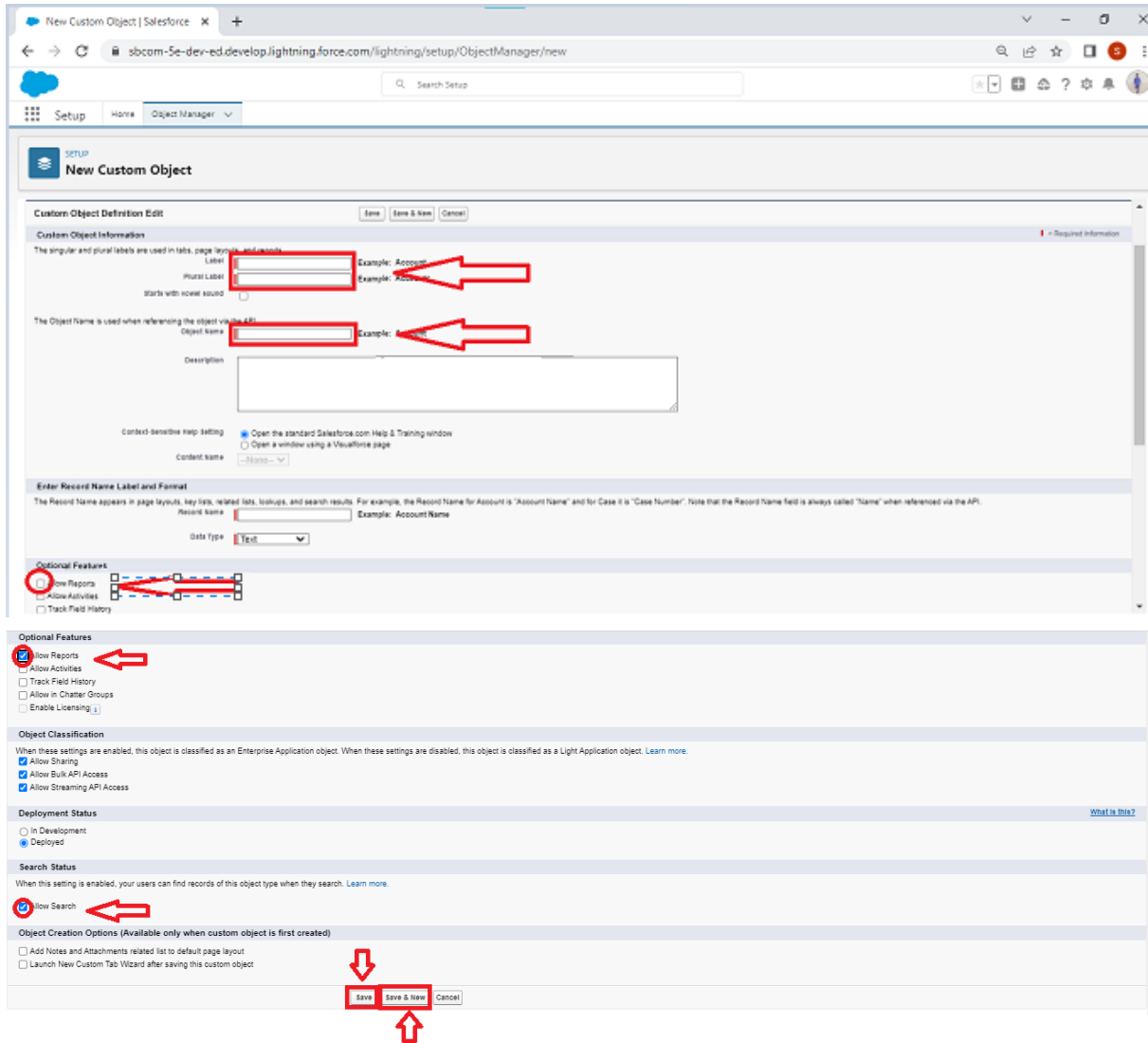
- Click on the gear icon and then select Setup.
- Click on the object manager tab just beside the home tab.

- After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
- Creation of Vehicle Object

On the Custom Object Definition page, create the object as follows:

- Label: Vehicle
- Plural Label: Vehicles
- Record Name: Vehicle Name
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.
- Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.
- Under Custom Object Tabs, click New.
- For Object, select Vehicle.
- For Tab Style, select any icon.
- Leave all defaults as is. Click Next, Next, and Save.





The screenshot shows the 'New Custom Object' setup page in Salesforce. Red annotations highlight the following fields and sections:

- Custom Object Information:**
 - Label:** A text field with an example of 'Account'.
 - Object Name:** A text field with an example of 'Account'.
- Optional Features:**
 - Allow Reports:** A checkbox that is checked.
- Object Classification:**
 - Allow Sharing:** A checkbox that is checked.
 - Allow Bulk API Access:** A checkbox that is checked.
 - Allow Streaming API Access:** A checkbox that is checked.
- Deployment Status:**
 - Deployed:** A radio button that is selected.
- Search Status:**
 - Allow Search:** A checkbox that is checked.
- Object Creation Options:**
 - Add Notes and Attachments related list to default page layout:** A checkbox that is checked.
 - Launch New Custom Tab Wizard after saving this custom object:** A checkbox that is checked.
- Buttons:** At the bottom, the 'Save', 'Save & New', and 'Cancel' buttons are highlighted.

Activity 2:

To Create a driver object continue the same steps Which is followed for the above object.

Milestone -3:Fields and Relationship

An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

Activity-1:

Creation of fields:

Fields in Vehicles objects follow below data types:

S NO.	Field Names	Data Types
1.	Customer Name	Text
2	Customer Mobile No	Number
3	Vehicle Type i)2 wheeler ii)4 wheeler	Picklist
4.	2WHEELERS i) HERO ii)HONDA iii)BAJAJ iv)ROYAL ENFIELD v)TVS vi)KINETIC vii)OLA viii)JAWA ix)SD x)BATTERY	Picklist
5	4WHEELERS i) RENAULT ii)SKODA iii) HONDA iv)HYUNDAI v)SUZUKI	Picklist

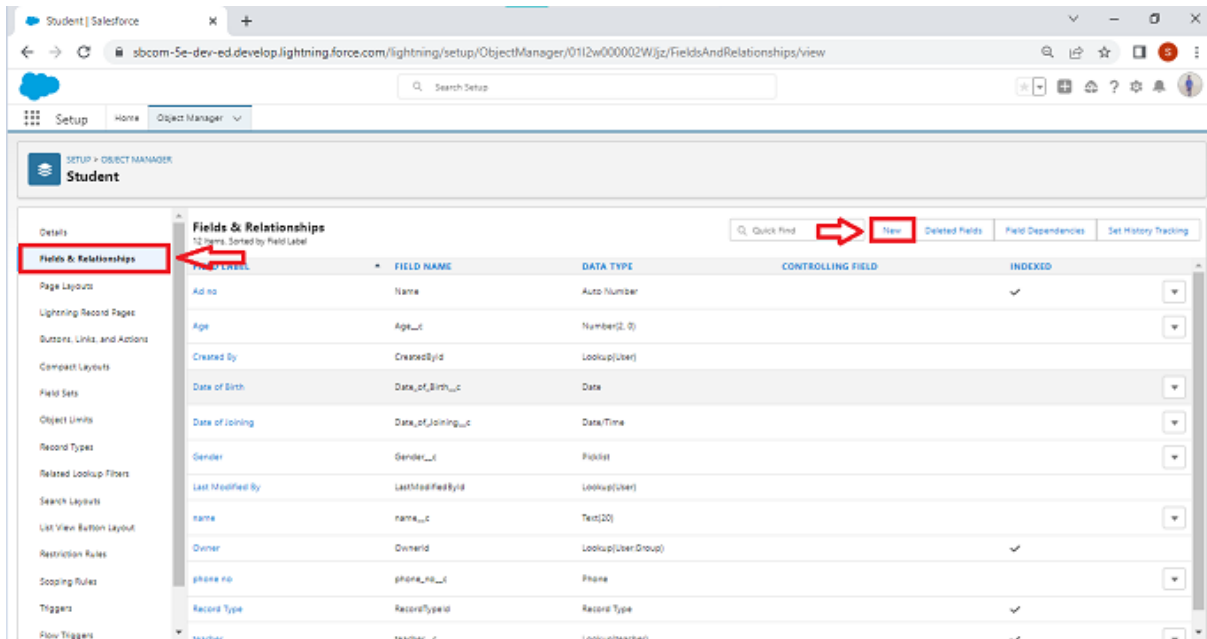
	vi)MAHINDRA vii)VOLKSWAGEN viii)BENZ ix)AUDI x)VOLVO	
6.	Vehicle Name	Text
7.	Vehicle No	Text
8.	Chassic No	Text
9.	Colour	Text
10.	Body Type	Text
11.	Vehicle Includes i)Fire Extenuation ii)First Aid Kit iii)Multi Charger kit iv)Stepney v)Stereo vi)Tool Kit vii)Tracking Device viii)Tyre Jack	Multi Picklist
12.	Condition i)Good ii)Medium iii)Least	Picklist
13	Mileage	Text
14	Seats	Number
15	Start Date	Date/Time
16	End Date	Date/Time
17	Opportunity	Lookup(opportunities)

Activity-2:

Fields in Driver objects follow below data types:

S No	Field	Data Type
1	Driver Name	Text
2	Licence No	Text
3	Mobile No	Number
4	Fair Per Hour	Text
5	Vehicle	Lookup(Vehicle)

Now click on “Fields & Relationships” → New



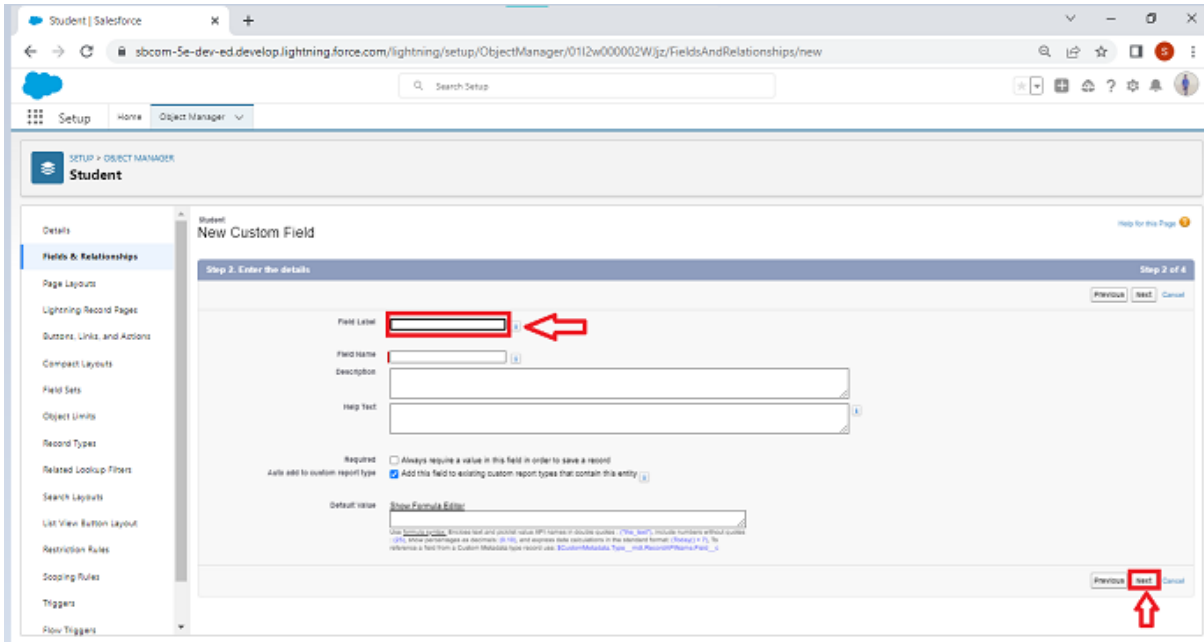
Fields & Relationships

11 items. Sorted by Field Label

Quick Find → New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Ad no	Name	Auto Number		✓
Age	Age__c	Number(2, 0)		
Created By	CreatedBy	Lookup(User)		
Date of Birth	Date_of_Birth__c	Date		
Date of joining	Date_of_joining__c	Date/Time		
Gender	Gender__c	Picklist		
Last Modified By	LastModifiedBy	Lookup(User)		
name	name__c	Text(20)		
Owner	OwnerId	Lookup(User Group)		✓
phone no	phone_no__c	Phone		
Record Type	RecordTypeId	Record Type		✓
searcher	searcher__c	Lookup(Searcher)		

Fill the field label name → Next → Next → Save.



Activity-3:

Fields In Driver Object:

Create a dependency between these two picklists, so that when a Vehicle type is selected, only respective 2Wheeler Brands are available in the 2Wheeler field, Similarly for 4 wheelers.

The below steps will assist you in creating Field Dependencies.

- Click on the gear icon and then select Setup.
- Click on the object manager tab just beside the home tab.
- After the above steps, Select Vehicles Object
- Now Select Fields and relationships from setup menu of the vehicle object.
- Click Field Dependencies.
- Click New.
- Select Vehicle Type as the Controlling Field and select 2wheelers as the Dependent Field.
- Click Continue.
- Select the appropriate 2 wheelers Brands in each column by double-clicking them.
- 2WHEELERS :i) HERO
ii)HONDA
iii)BAJAJ
iv)ROYAL ENFIELD
v)TVS
vi)KINETIC
vii)OLA

viii)JAWA
ix)SD
x)BATTERY

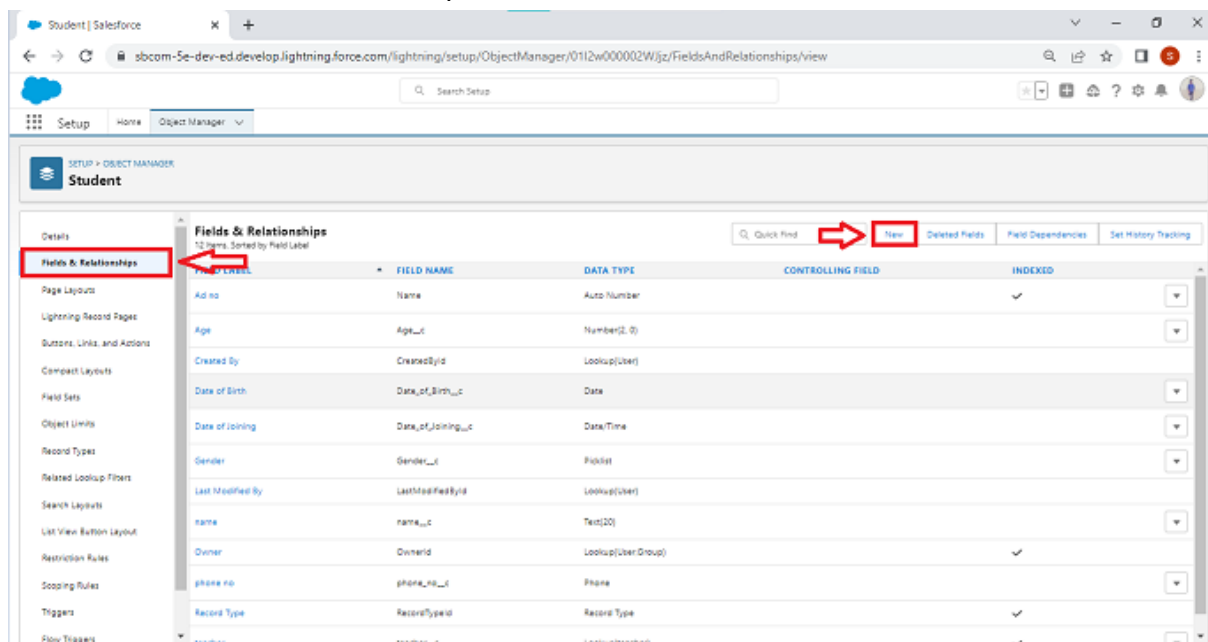
- Click Include Values.
- Click Preview, then test the dependency by selecting different Vehicle Type and viewing the different Vehicles available for Vehicle Type.
- Click Close to close the preview window.
- Click Save.

Follow same steps for 4wheelers also

- Vehicle Type as the Controlling Field and select 4wheelers as the Dependent Field.
- Click Continue.
- Select the appropriate 4wheelers Brands in each column by double-clicking them.
- 4WHEELERS :
i) RENAULT
ii)SKODA
iii) HONDA
iv)HYUNDAI
v)SUZUKI
vi)MAHINDRA
vii)VOLKSWAGEN
viii)BENZ
ix)AUDI
x)VOLVO

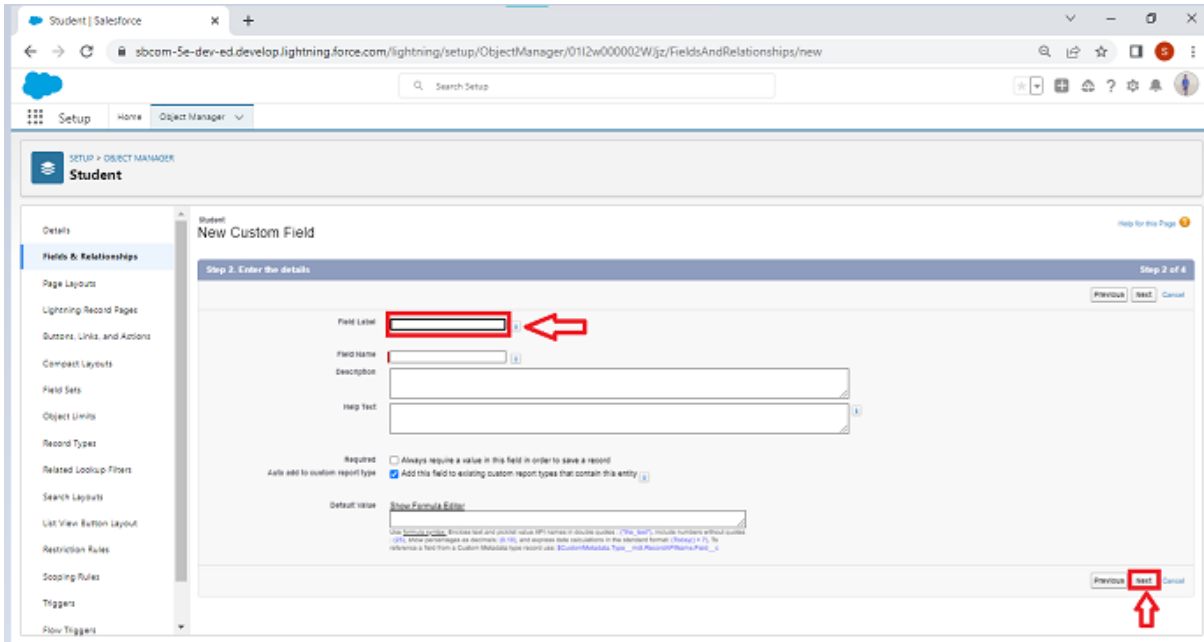
- Click Include Values.
- Click Preview, then test the dependency by selecting different Vehicle Type and viewing the different Vehicles available for Vehicle Type.
- Click Close to close the preview window.
- Click Save.

Now click on “Fields & Relationships” → New



FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Ad no	Auto Number		✓
Age	Number(2, 0)		
Created By	Lookup(User)		
Date of Birth	Date		
Date of Joining	Date/Time		
Gender	Picklist		
Last Modified By	Lookup(User)		
name	Text(20)		
Owner	Lookup(User Group)		✓
phone no	Phone		
Record Type	Record Type		✓
searcher	Lookup(Searcher)		

Fill the field label name → Next → Next → Save.



Milestone-4:Lightning 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.

Activity-1:

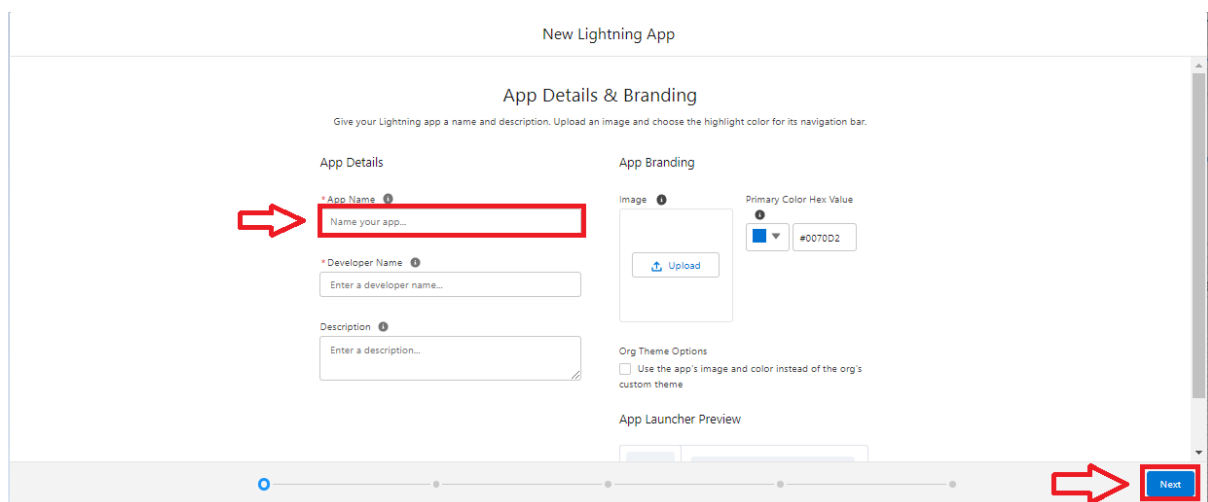
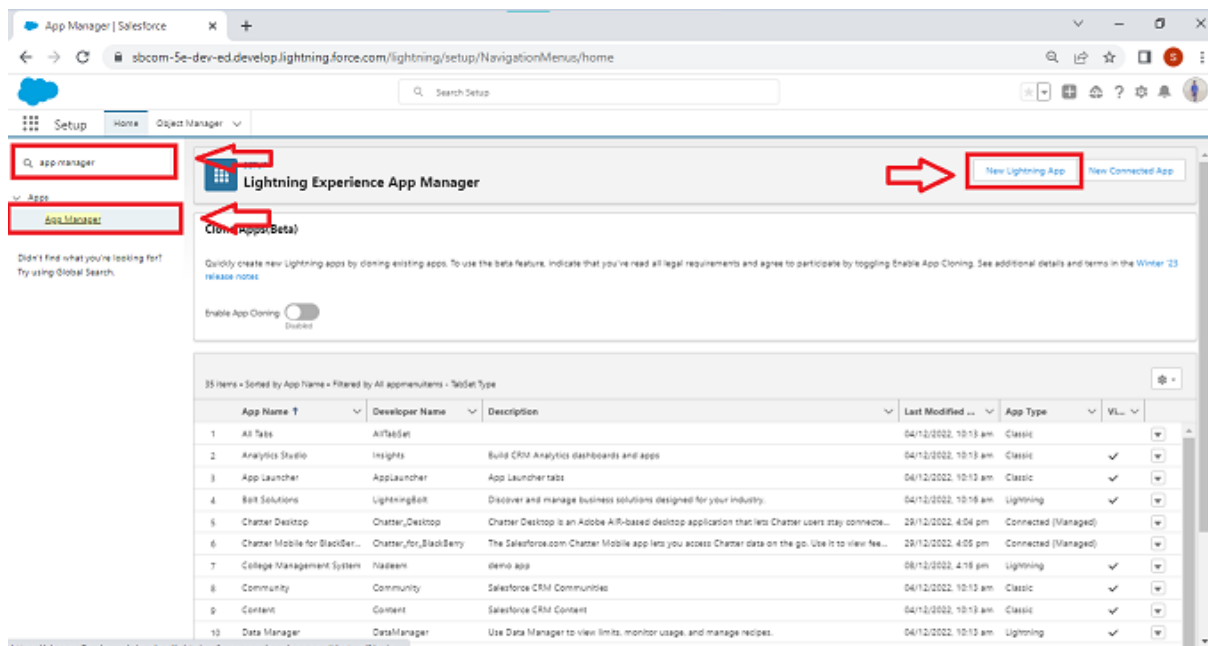
Create the Vehicle Management Construction app

- From Setup, enter App Manager in the Quick Find and select App Manager.
- Click New Lightning App. Enter Vehicle Management as the App Name, then click Next
- Under App Options, leave the default selections and click Next.
- Under Utility Items, leave as is and click Next.

- From Available Items, select Accounts, Contacts, Opportunities, Vehicle, Driver, Reports, and Dashboards and move them to Selected Items. Click Next.
- From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.
- To verify your changes, click the App Launcher, type Vehicle Management and select the Vehicle Management app.

Note:

1. App Launcher-Displays available apps.
2. App Name-Displays the current selected app.
3. Navigation menu-Displays the tabs available inside the app.



To Add Navigation Items:

Select the items from the search bar and move it using the arrow button → Next.

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

Search: Type to filter list...

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

Selected Items

No items selected

Back Progress bar Next

To Add User Profiles:

Search profiles in search bar → click on the arrow button → save & finish.

New Lightning App

User Profiles

Choose the user profiles that can access this app.

Available Profiles

Search: 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 Progress bar Save & Finish

To create fields in an object:

Go to setup → click on Object Manager → type object name in search bar → click on the object.

Object Manager | Salesforce

sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Setup Home **Object Manager**

Search Setup

Object Manager

2 items, Sorted by Label

Search: student

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Student	Student__c	Custom Object	College Management System	15/12/2022	✓
Students Activity	Students_Activity__c	Custom Object	created for the purpose of junction object	01/01/2023	✓

Milestone-5: Profile

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges

Activity 1:

Creating a Profiles:Now create a Vehicle Manager profile and set its object permissions.

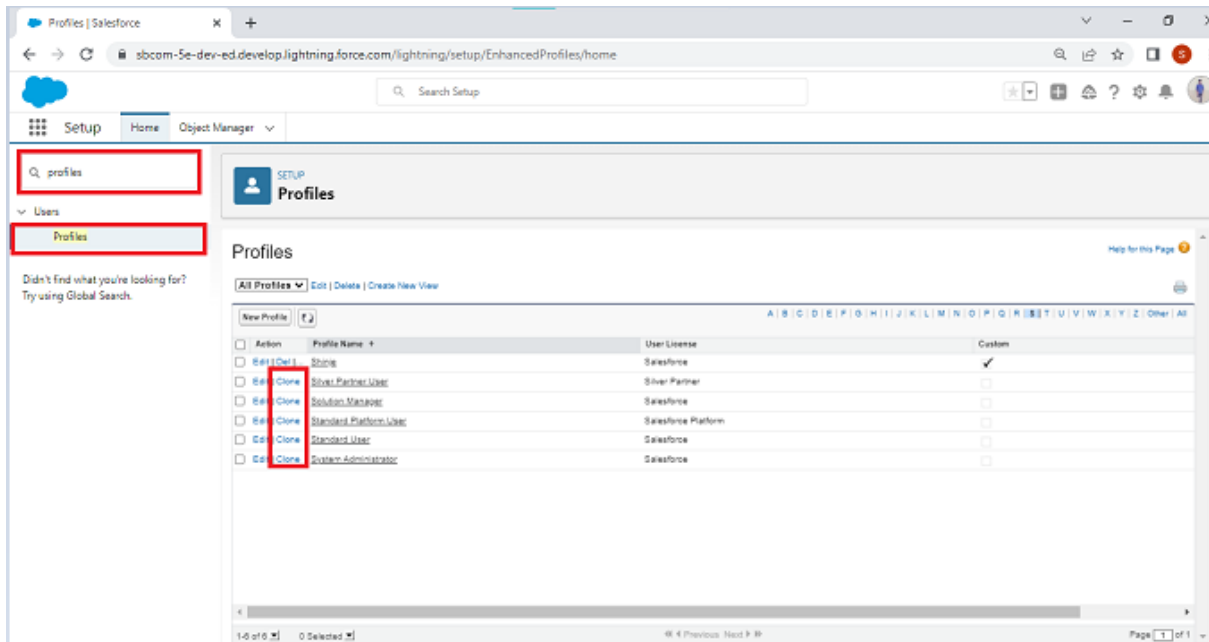
Creating a Profiles:

Now create a Vehicle Manager profile and set its object permissions.

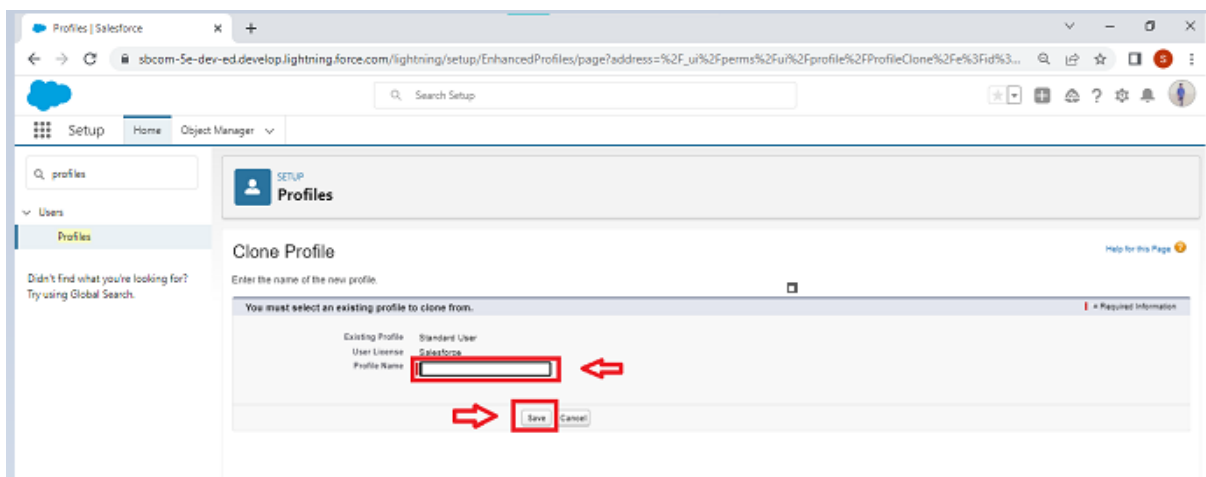
- From Setup enter Profiles in the Quick Find box, and select Profiles.
- From the list of profiles, find Standard User.
- Click Clone.
- For Profile Name, enter Vehicle Manager.
- Click Save.
- While still on the Vehicle Manager profile page, then click Edit.
- Scroll down to Custom Object Permissions and give access for Create,Read,Edit,Delete,View all and modify all for Vehicle object and Drivers object.

To create a new profile:

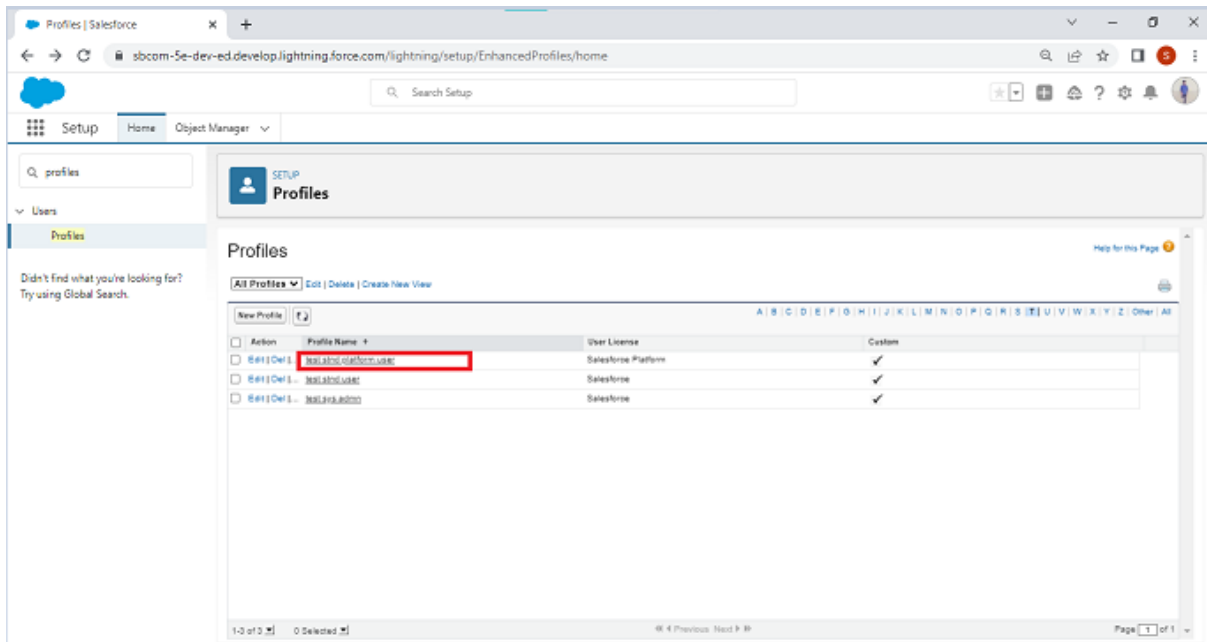
Go to setup → type profiles in quick find box → click on profiles → clone the desired profile (standard user is preferable) → enter profile name → save



Enter a Profile Name



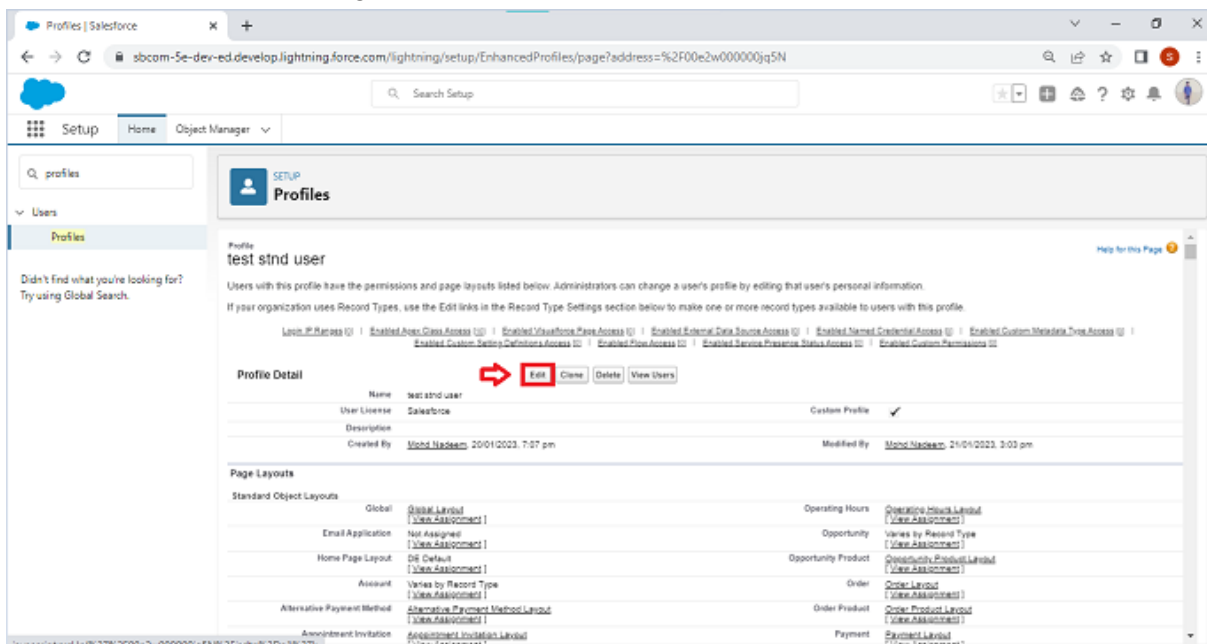
Click on the new created profile



The screenshot shows the Salesforce Setup page for Profiles. The left sidebar has a search bar with 'profiles' entered and a 'Profiles' link under the 'Users' section. The main content area is titled 'Profiles' and shows a table of profiles. The first profile, 'test std user', is highlighted with a red box. The table has columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The 'test std user' profile has a 'Salesforce' license and is marked as 'Custom'.

Action	Profile Name	User License	Custom
<input type="checkbox"/>	test std user	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/>	test std user	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	test std user	Salesforce	<input checked="" type="checkbox"/>

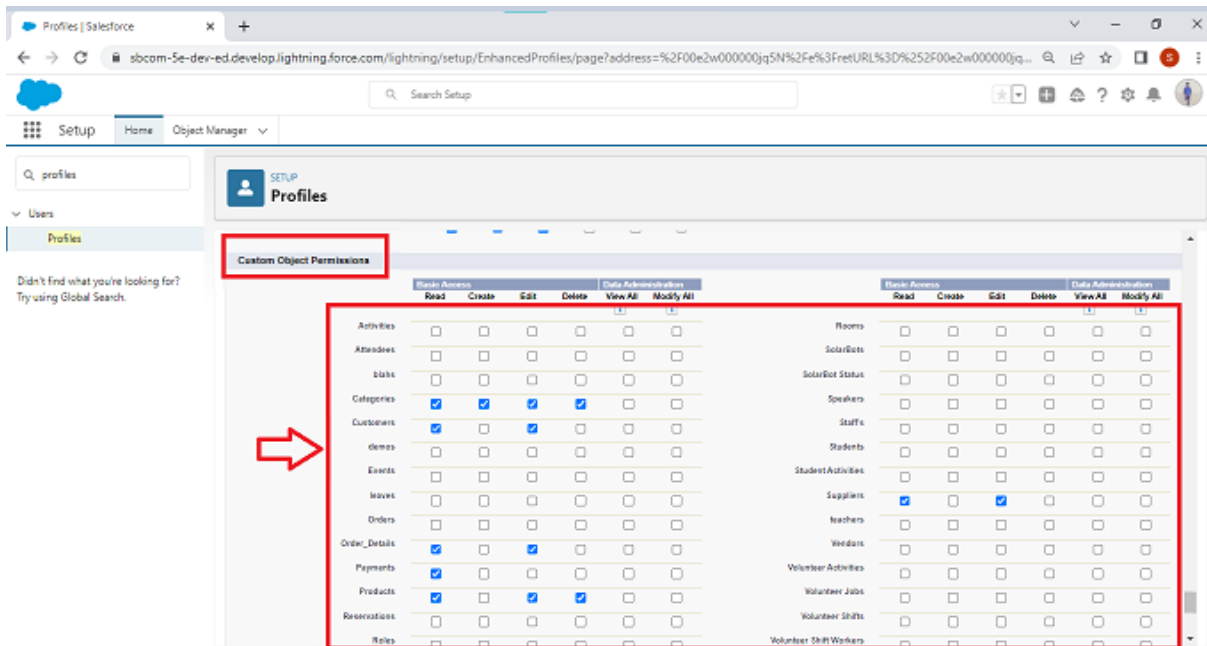
While still on the profile page, then click Edit.



The screenshot shows the 'Profile Detail' page for the 'test std user' profile. The page has a red arrow pointing to the 'Edit' button. Below the 'Edit' button, there is a table with columns for 'Name', 'User License', 'Description', 'Created By', and 'Modified By'. The 'test std user' profile is listed with a 'Salesforce' license, 'Not Assigned' description, and was created by 'Mehmet Nadeem' on 20/01/2023. Below this table, there is a 'Page Layouts' section with a table of layouts. The 'test std user' profile is assigned the 'Global Layout' for the 'Standard Object Layouts'.

Name	User License	Description	Created By	Modified By
test std user	Salesforce	Not Assigned	Mehmet Nadeem, 20/01/2023, 7:07 pm	Mehmet Nadeem, 21/01/2023, 3:03 pm

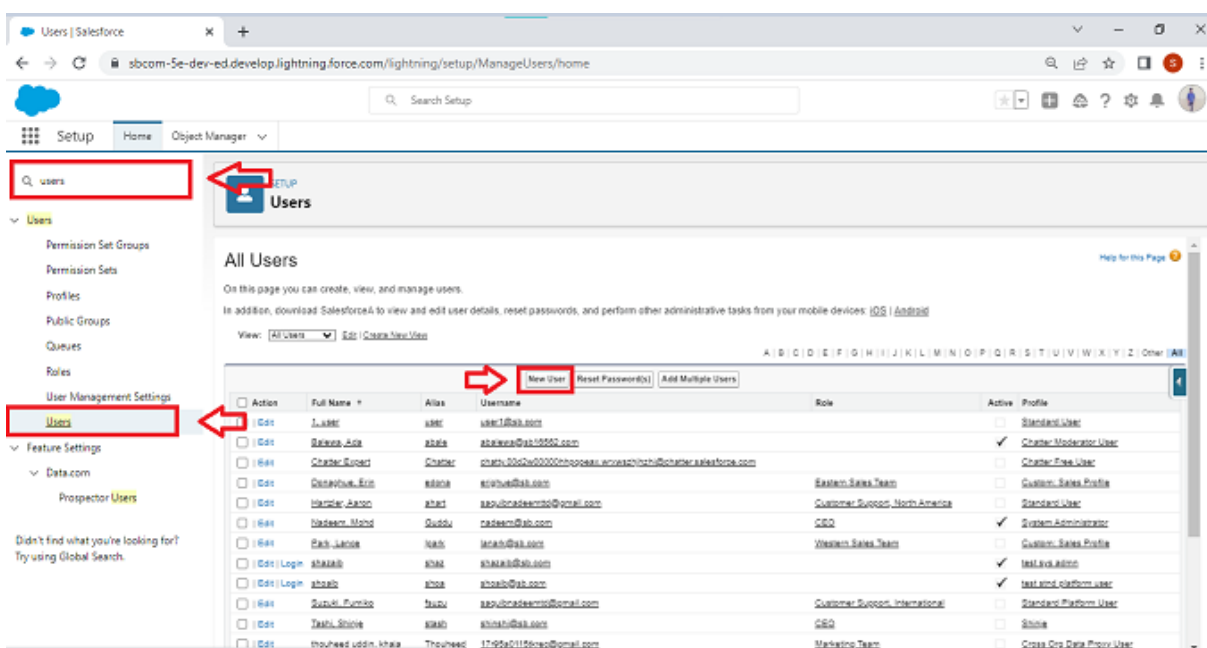
Scroll down to Custom Object Permissions and Give view all access permissions and assign to the parent profile



The screenshot shows the Salesforce Setup interface for Profiles. The left sidebar has a search bar with "profiles" entered. The main content area is titled "Profiles" and shows a table of custom object permissions. A red box highlights the "Custom Object Permissions" section, and a red arrow points to the "Activities" row in the table.

Object	Read	Create	Edit	Delete	View All	Modify All
Activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attendees	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Blacks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Categories	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Demos	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Leaves	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Orders	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Order_Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Payments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Products	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reservations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Roles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Similarly Create operator profile ,Clone Salesforce Platform user and give access only for Vehicles object.



The screenshot shows the Salesforce Setup interface for Users. The left sidebar has a search bar with "users" entered. The main content area is titled "Users" and shows a table of all users. A red box highlights the "Users" section in the sidebar, and a red arrow points to the "New User" button in the top right corner of the table.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	J. White	white	white1@sales.com		<input type="checkbox"/>	Standard User
<input type="checkbox"/>	Rajesh Kulkarni	kulkarni	rajeshk@sales.com		<input checked="" type="checkbox"/>	Operator-Modarator User
<input type="checkbox"/>	Chetan Sood	sood	chetan.sood@sales.com		<input type="checkbox"/>	Operator-Free User
<input type="checkbox"/>	Chetan Sood	sood	chetan.sood@sales.com	System Sales Team	<input type="checkbox"/>	Custom Sales Profile
<input type="checkbox"/>	Chetan Sood	sood	chetan.sood@sales.com	Customer Support - North America	<input type="checkbox"/>	Standard User
<input type="checkbox"/>	Chetan Sood	sood	chetan.sood@sales.com	CEO	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Chetan Sood	sood	chetan.sood@sales.com	Western Sales Team	<input type="checkbox"/>	Custom Sales Profile
<input type="checkbox"/>	Chetan Sood	sood	chetan.sood@sales.com		<input checked="" type="checkbox"/>	test user
<input type="checkbox"/>	Chetan Sood	sood	chetan.sood@sales.com	Customer Support - International	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Chetan Sood	sood	chetan.sood@sales.com	CEO	<input type="checkbox"/>	System
<input type="checkbox"/>	Chetan Sood	sood	chetan.sood@sales.com	Marketing Team	<input type="checkbox"/>	Custom Sales Profile

Setup Roles:

1. Click on the Gear Icon
2. Click "Setup"
3. In the Quick Find box, enter "Roles"
4. Click "Roles"
5. Click on "Set Up Roles"
6. Click "Expand All"
7. Under the CEO, click on "Add Role"
8. Fill up the Label as Vehicle Manager, Role Name Vehicle_Manager.
9. Enter a Role name that will be displayed on Reports
10. Click on Save .

Similarly create Two Roles under Vehicle Manager as Operator 1 And Operator 2 Roles which will report to the Vehicle manager.

Milestone-6: Users

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.

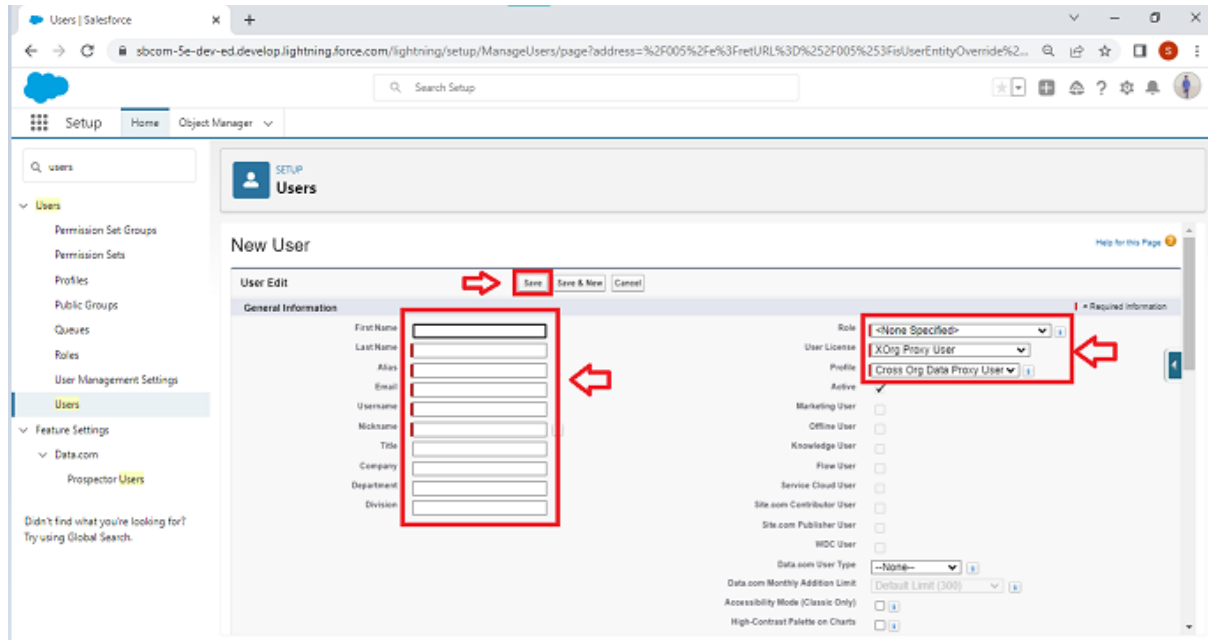
Activity 1:

Creating a Users:

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User.
3. Enter the user's name John Teddy and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
4. Select a **Role**(Vehicle Manager)
5. Select a User Licence As salesforce.
6. Select a profile as Vehicle Manager.

7. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.

Fill in the fields (first name, last name, alias, email id, username, nick name, role, user license, profiles) → save.



Similarly Create other 2 users and assign operator 1 and operator 2 roles along with operator profile .

Milestone-7: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:

Reports And Dashboards.

- Go to Reports and click New Report.
- Select the Accounts, Contacts and Vehicle report type and click Start Report.

- To begin filtering, click Filters.
- Click the Show Me standard filter and select My Contacts. Click Apply.
- Click on add columns add Vehicle:Vehicle name, Vehicle:Customer id, Vehicle:Customer name,Vehicle:Customer Number,Vehicle:Chassis Number.
- Click Save.
- Save your report as Vehicle and Customer Details and accept the auto-generated unique name.

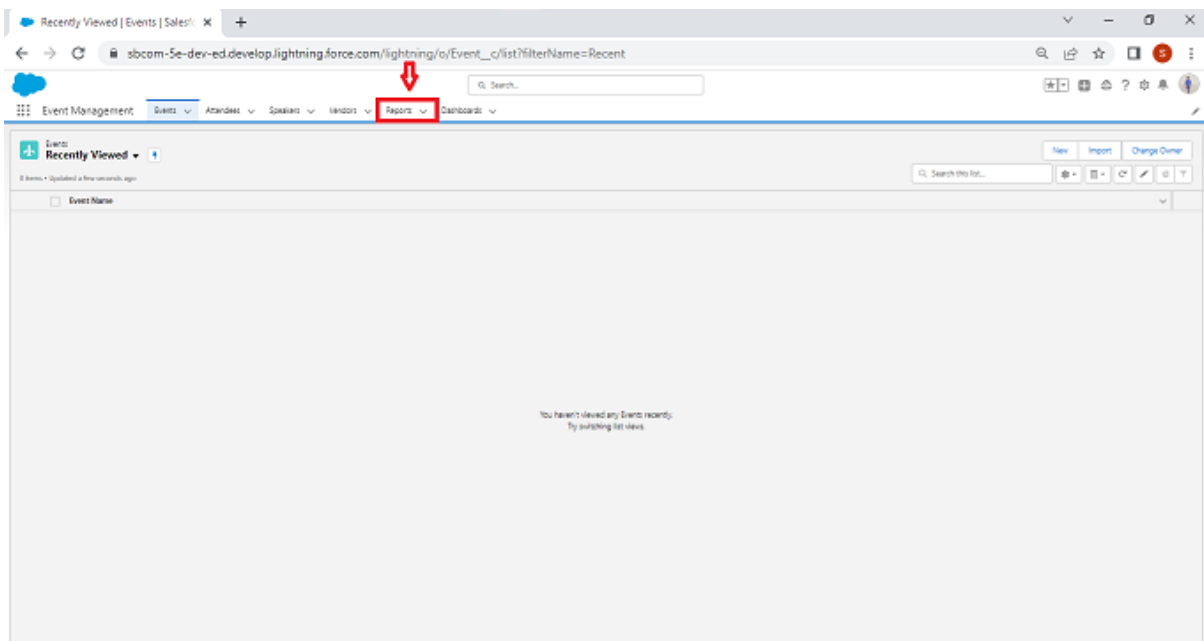
Activity 2:

Dashboard:

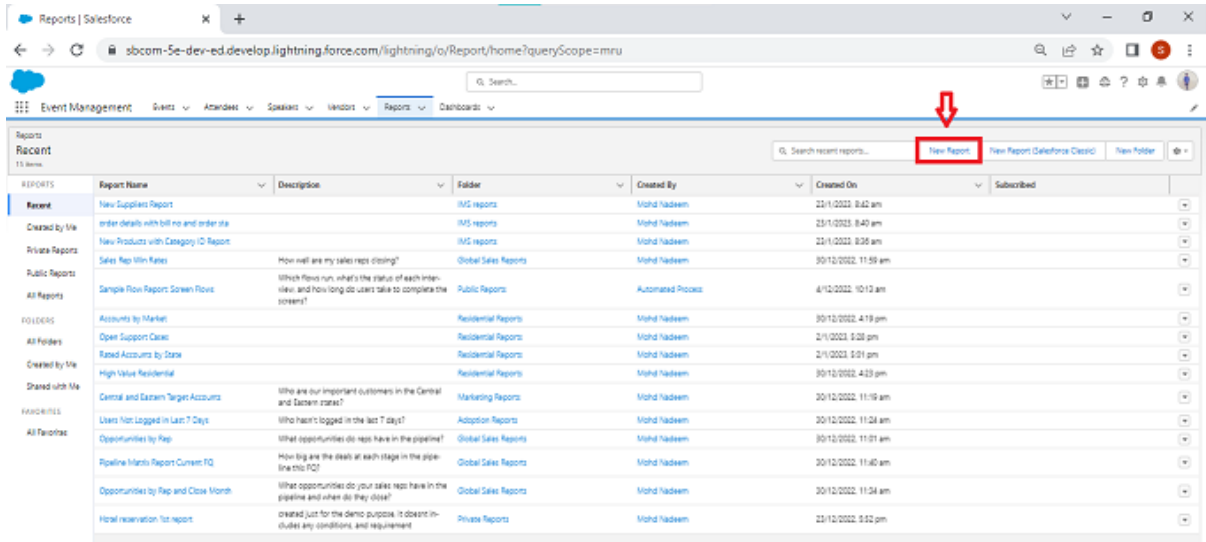
1. Click the Dashboards tab.
2. Click New Dashboard.
3. Name the dashboard Vehicle and Customer Details and click Create.
4. Click +Component.
5. Select the Supplies report and click Select.
6. Select the Vertical Bar Chart component and click Add.
7. Click Save and then Done.

To create a report:

Go to the app → click on the reports tab



Click New Report



Reports | Salesforce

sbcom-5e-dev-ed.develop.lightning.force.com/lightning/r/Report/home?queryScope=mru

Event Management | Quizzes | Assessments | Surveys | Reports | Dashboards

Search recent reports...

New Report | New Report (Salesforce Classic) | New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Suppliers Report		IMS reports	Mohd Nadeem	23/1/2023 8:42 am	
Created by Me	Order details with bill no and order site		IMS reports	Mohd Nadeem	23/1/2023 8:40 am	
Private Reports	New Products with Category ID Report		IMS reports	Mohd Nadeem	23/1/2023 8:35 am	
Public Reports	Sales Rep Win Rates	How well are my sales reps doing?	Global Sales Reports	Mohd Nadeem	30/12/2022 11:55 am	
All Reports	Sample Row Report Screen Flows	Which flows run, what's the status of each implementation, and how long do users take to complete the screens?	Public Reports	Automated Process	4/12/2022 10:12 am	
FOLDERS	Accounts by Market		Residential Reports	Mohd Nadeem	30/12/2022 4:19 pm	
All Folders	Open Support Cases		Residential Reports	Mohd Nadeem	2/1/2023 9:28 pm	
Created by Me	Rated Accounts by State		Residential Reports	Mohd Nadeem	2/1/2023 9:21 pm	
Shared with Me	High Value Residential		Residential Reports	Mohd Nadeem	30/12/2022 4:23 pm	
FAVORITES	Central and Eastern Target Accounts	Who are our important customers in the Central and Eastern states?	Marketing Reports	Mohd Nadeem	30/12/2022 11:19 am	
All Favorites	Users Not Logged in Last 7 Days	Who hasn't logged in the last 7 days?	Adoption Reports	Mohd Nadeem	30/12/2022 11:24 am	
	Opportunities by Rep	What opportunities do reps have in the pipeline?	Global Sales Reports	Mohd Nadeem	30/12/2022 11:01 am	
	Pipeline Metrics Report Current FQ	How big are the deals at each stage in the pipeline this FQ?	Global Sales Reports	Mohd Nadeem	30/12/2022 11:40 am	
	Opportunities by Rep and Close Month	What opportunities do your sales reps have in the pipeline and when do they close?	Global Sales Reports	Mohd Nadeem	30/12/2022 11:24 am	
	Hotel reservation for report	created just for the demo purpose. It doesn't include any conditions, and requirement	Private Reports	Mohd Nadeem	23/12/2022 9:52 pm	

Select report type from category or from report type panel or from search panel → click on start report.

Create Report

Category

Recently Used

All

Accounts & Contacts

Opportunities

Customer Support Reports

Leads

Campaigns

Activities

Contracts and Orders

Price Books, Products and Assets

Administrative Reports

File and Content Reports

Individuals

Other Reports

Hidden Report Types

Select a Report Type

Search Report Types...

Report Type Name	Category
Accounts	Standard
Contacts & Accounts	Standard
Accounts with Partners	Standard
Account with Account Teams	Standard
Accounts with Contact Roles	Standard
Accounts with Assets	Standard
Contacts with Assets	Standard
Accounts with SolarBots	Standard
Account History	Standard
Contact History	Standard
D&B Company with and without Accounts	Standard
Opportunities	Standard
Opportunities with Products	Standard
Opportunities with Contact Roles	Standard
Opportunities with Partners	Standard
Opportunities with Competitors	Standard
Opportunity History	Standard
Opportunity Field History	Standard
Opportunity Trends	Standard

Details

Accounts

Standard Report Type

Start Report

Details

Fields (71)

Created By You

- Accounts by Market
Last Used 1/3/2023
- Rated Accounts by State
Last Used 1/2/2023
- High Value Residential
Last Used 1/2/2023

Created By Others

No Reports Yet

Objects Used in Report Type

- Role
- Account
- Operating Hours
- Asset

Customize your report, then save or run it.

Report Builder | Salesforce

sbcom-5e-der-ed.develop.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYyOjY2ZmVudE1aWkZlCjhdHRyaWJ1dGVzjp7InlY29yZElkjoik...

Event Management | Events | Attendees | Speakers | Vendors | **Reports** | Dashboards

REPORTS

New Accounts Report | Accounts

Get Feedback? | Add Chart | Save & Run | Save | Close | Run

Use Outline | Filters

Groups

SHSLP-KONE

Add group...

Columns

Add column...

Last Activity

Account Owner

Account Name

Billing State/Province

Type

Rating

Last Modified Date

Previewing a limited number of records. Run the report to see everything.

	Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	-	Mohd Nadeem	United Oil & Gas, Singapore	-	Customer - Direct	Medium	18/01/2023
2	-	Mohd Nadeem	United Oil & Gas, UAE	-	Customer - Direct	Medium	18/01/2023
3	-	Mohd Nadeem	University of Arizona	-	Customer - Direct	Warm	18/01/2023
4	-	Mohd Nadeem	Whitney Kelle Household	-	Residential	Hot	18/01/2023
5	-	Mohd Nadeem	Whitney Kelle Household	-	Residential	Hot	18/01/2023
6	-	Mohd Nadeem	heena parwar	-	Customer - Direct	Warm	18/01/2023
7	-	Mohd Nadeem	gura randhawa	-	Installation Partner	Cold	18/01/2023
8	-	Mohd Nadeem	Pat Houth Household	-	Residential	Cold	18/01/2023

Update Preview Automatically

