

NAAN MUDHALVAN

SALESFORCE PROJECT REPORT

COLLEGE: PONJESLY COLLEGE OF ENGINEERING AND TECHNOLOGY

PROJECTTITLE: VEHICLE MANAGEMENT SYSTEM USING SALESFORCE BTECH

Done By:

NAME	NM ID	REG. NO
ABELKALINS. A	FD802A9F350CB939E974EA2FAF46AA27	961820205001
ABISHAI.U	85C5ABCB1EB22139C464C5FD28F9130D	961820205002
JESMILAN. J	003C7FB9C0EC1F6B81F410E9D200A47E	961820205014
SREEGAR. K.P .J	8847CFA801D5FFEB0E54B69D4C320045	961820205027
SUTHEESH. C	6D50DA69059A70AA9C84383EF506BE90	961820205028

Introducion:

Vehicle Management is an application where a customer Details are stored in order to choose cars, bikes and commercial vehicles for travel within the city. The data which is stored here, 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.

Project Flow:

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

Milestone1: Creation Of Developer Account

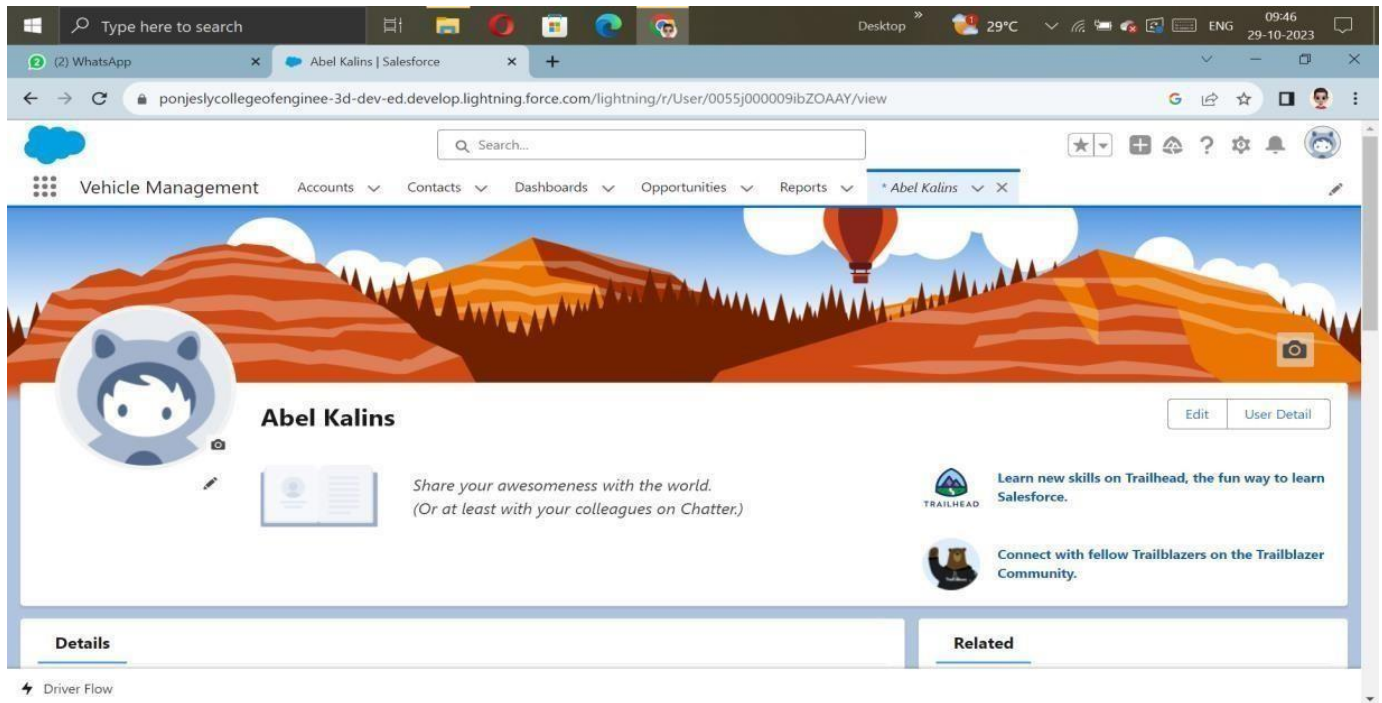
1. Go to developers.salesforce.com/
2. Click on sign up.

Account Activation:

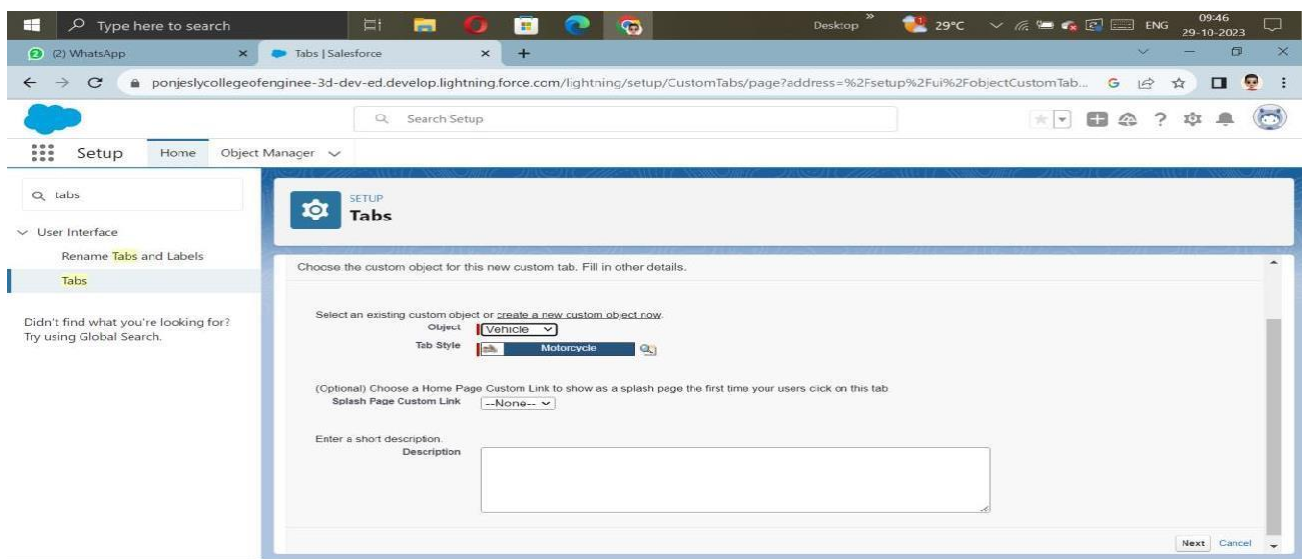
Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins, as

Login to Your Salesforce Account:

3. Go to sales force. command click on login
4. Enter the username and password that you just created.
5. After login this is the home page which you will see



Milestone2: Object Creation

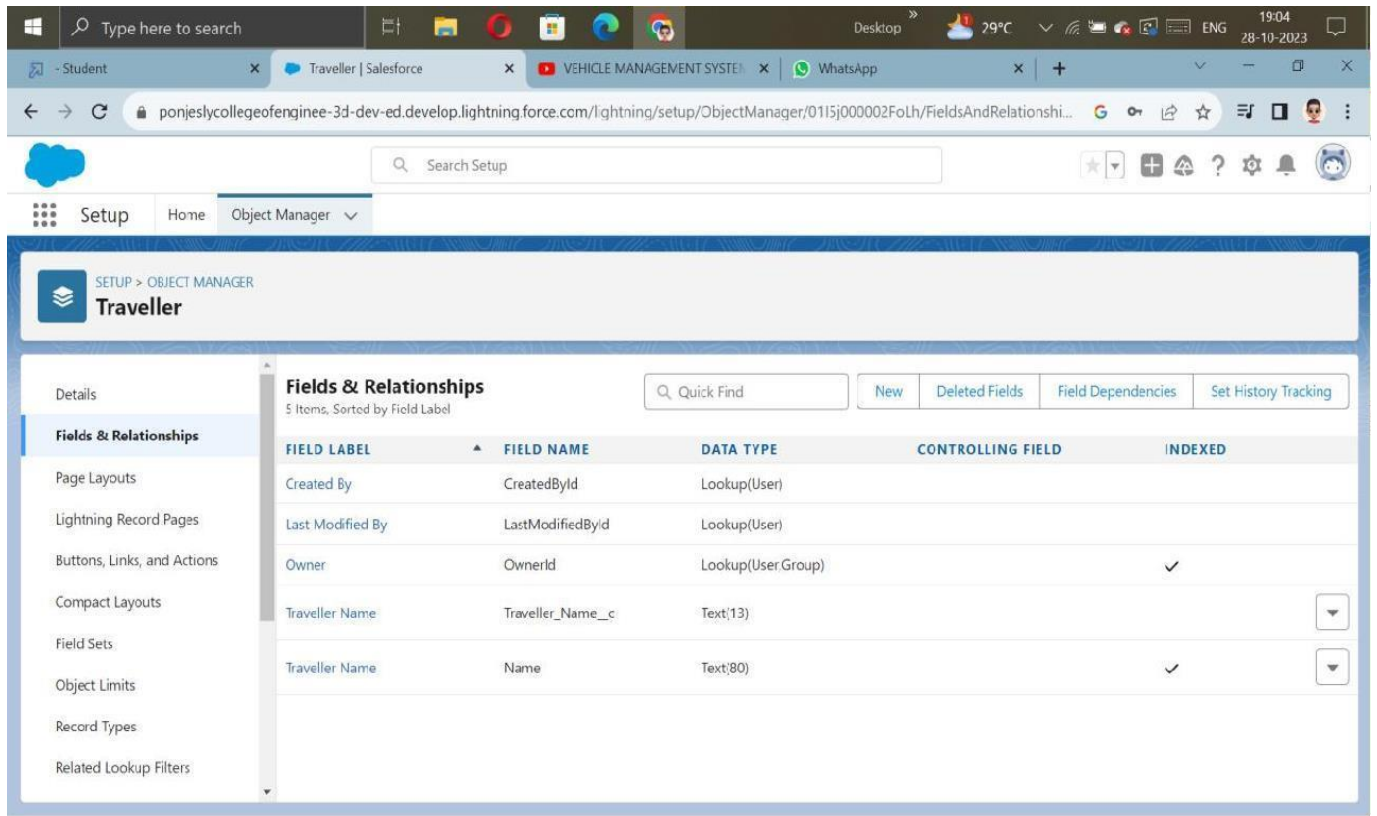


- Click on the gear icon and then select Setup.
- Click on the object manager tab just beside the home tab.
- After the above steps ,have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.

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

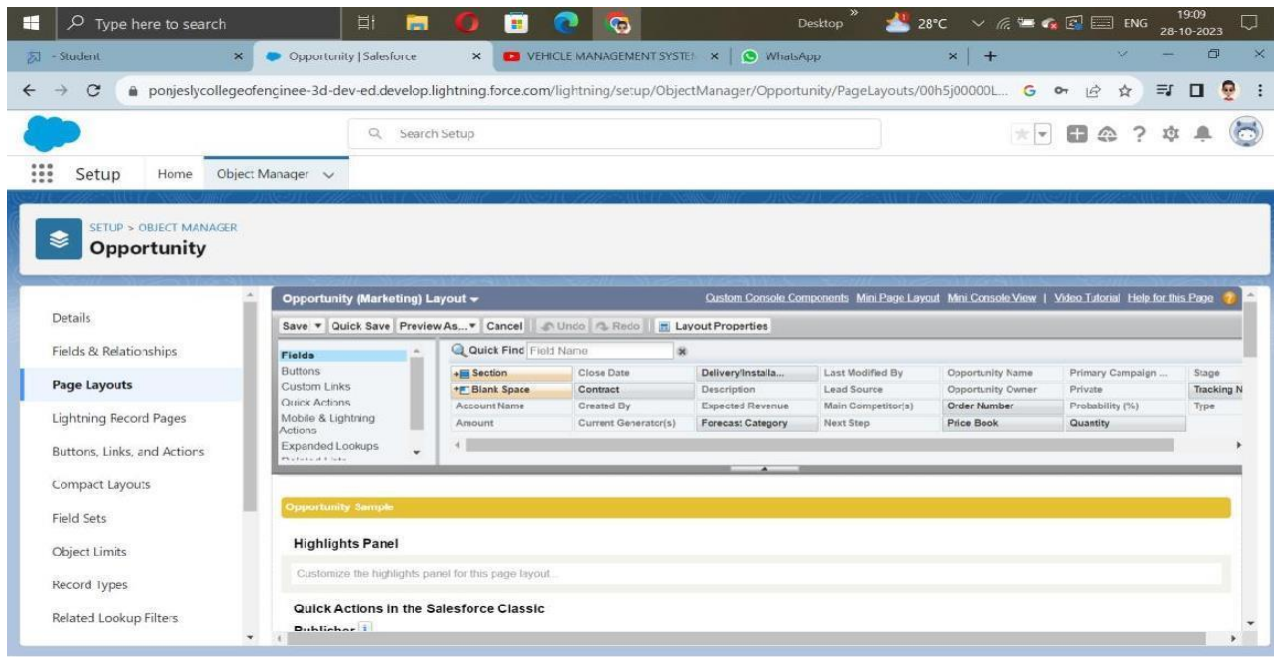
Milestone3: Fields & Relationships



The below steps will assist you in creating Fields.

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. Search object (Vehicle) in quick find box.
4. Click fields & relationships and click new
5. Select any data type click next
6. Enter field label name and select next, next, and Save

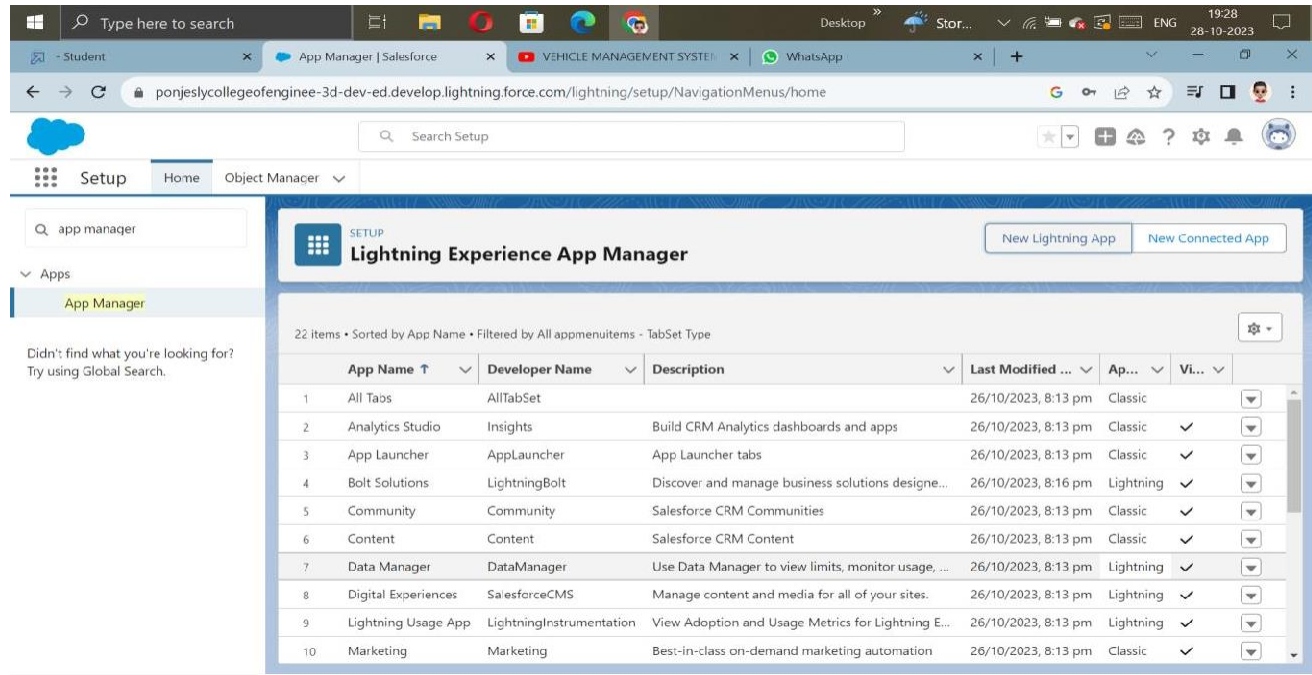
Milestone4: Page Layout



Organize Opportunity layout

- Click on the gear icon and then select Setup.
- Click on the object manager tab just beside the home tab.
- Search in quick find(Opportunity)& select Opportunity.
- Click on page layout and you can add or remove fields by drag & drop

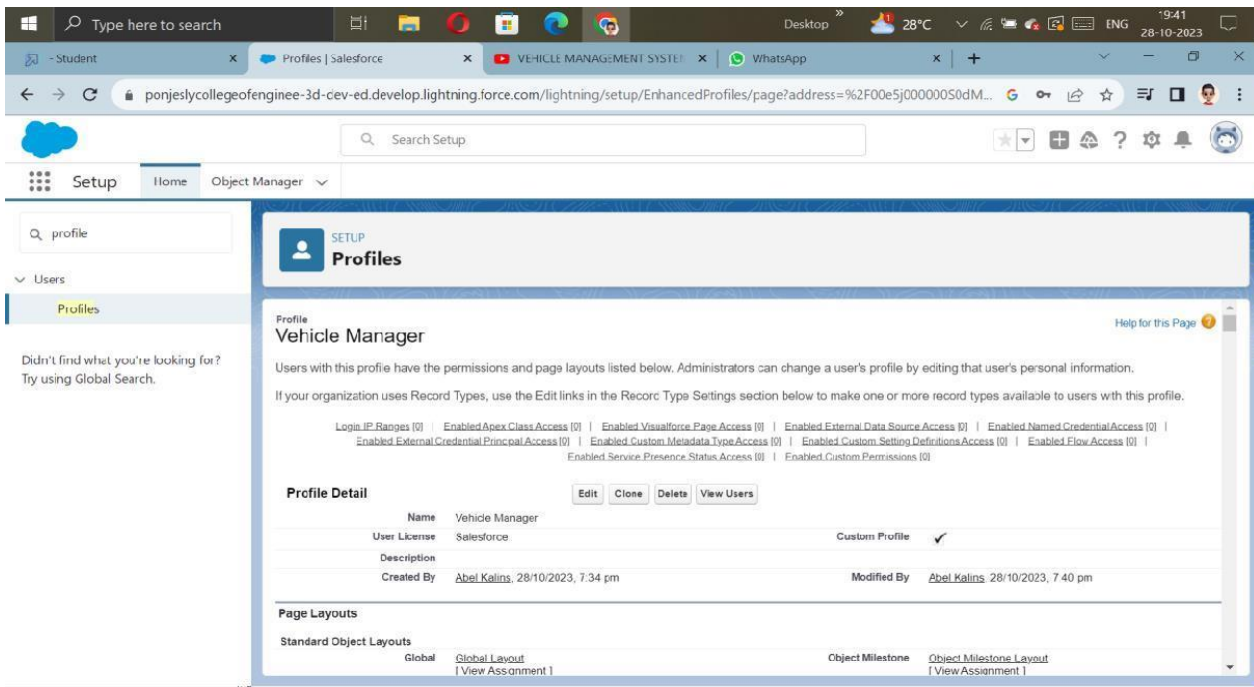
Milestone5: Lightning App



Create The Vehicle Management 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, Travelers, 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.

Milestone6: Profile



Creating A Profile:

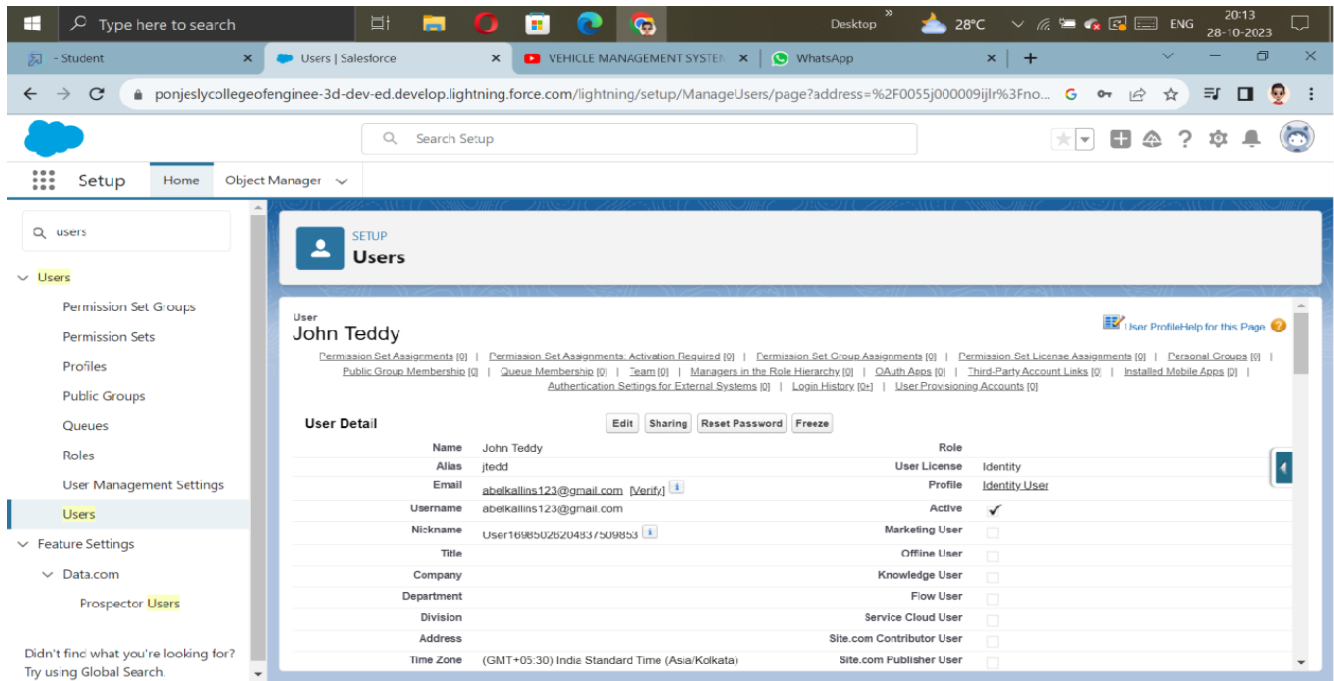
Now create a Vehicle Manager profile and set its object permissions.

- 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 ,and Delete, View all and modify all for Vehicle object Driver object and Traveler 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

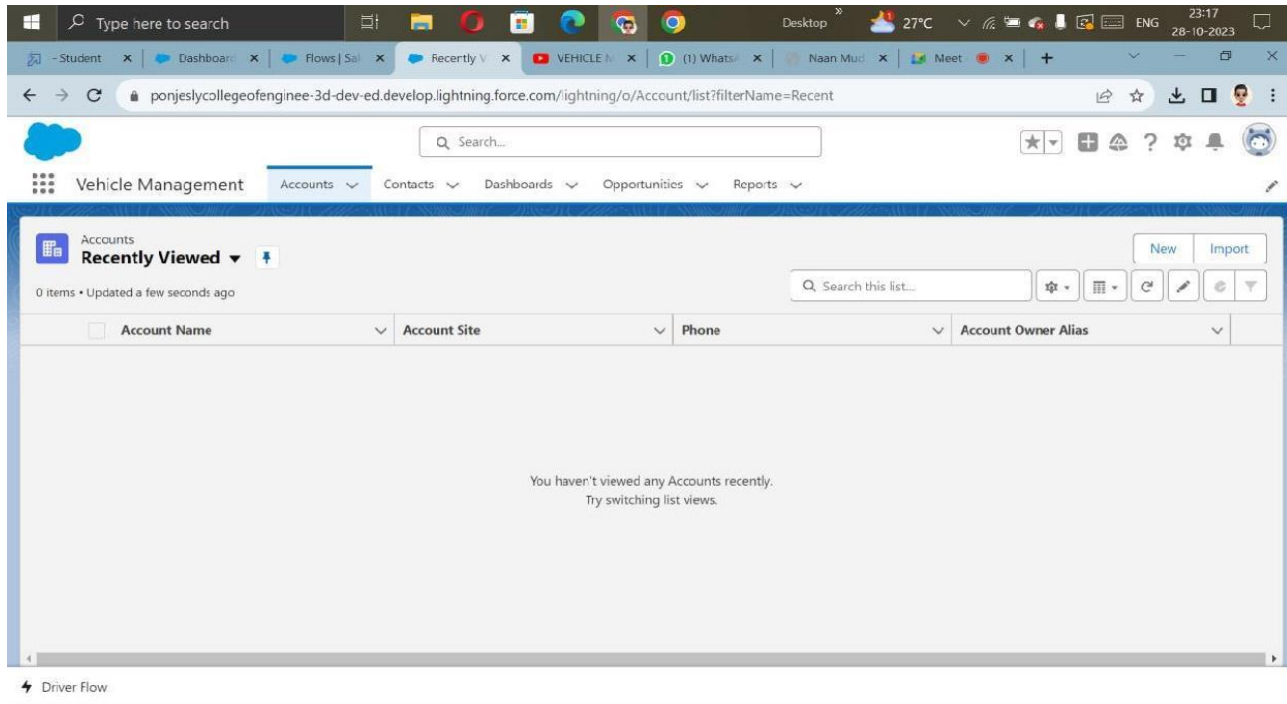
Milestone7: Users



Creating A User:

1. From Setup ,in the Quic 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 user name is the same as the email address.
4. Select a **Role**(Vehicle Manager)
5. Select a User License 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.
8. Click On Save.
9. User will receive an email to reset password.

Milestone8: User Adoption



- Click on App Launcher on left side of screen.
- Search Vehicle Management System & click on it.
- Click on Vehicle tab.
- Click new button
- Fill all Vehicle record details.
- Click on Save Button

Delete Record (Vehicle):

- Click on App Launcher on left side of screen.
- Search Vehicle Management System & click on it.
- Click on Vehicle Tab.
- Click on Arrow at right hand side on that Particular record.
- Click delete and delete again.

Milestone9: Reports

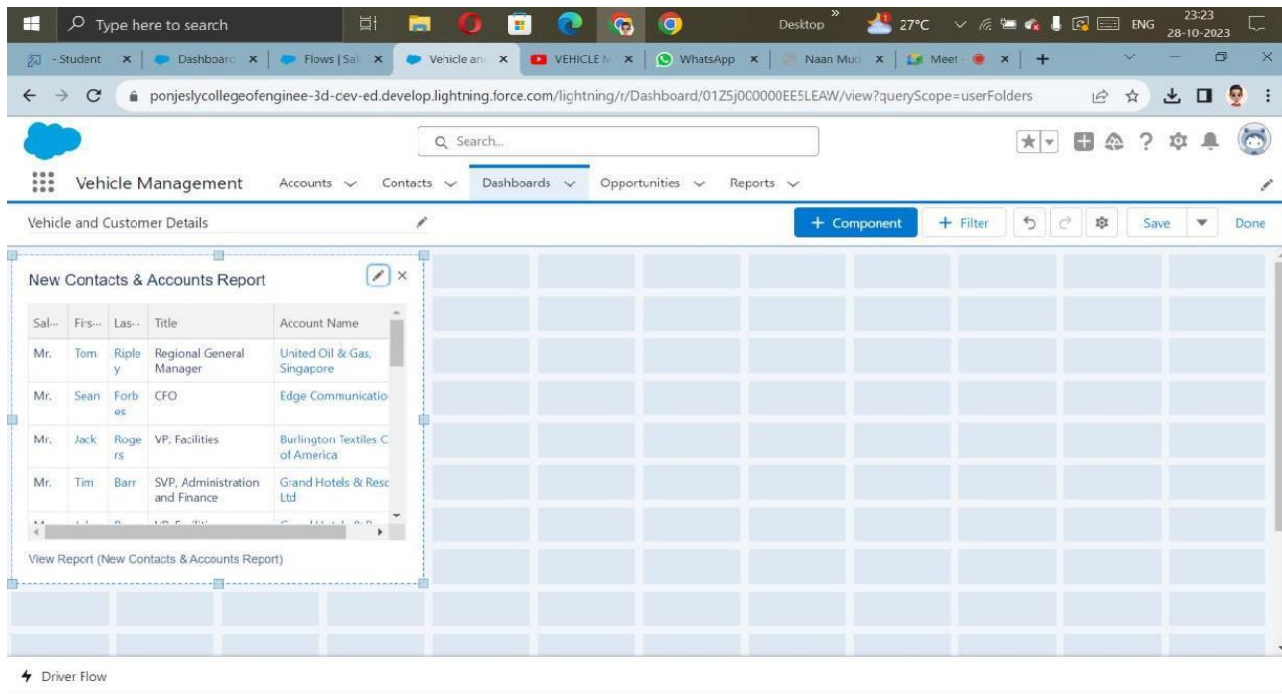
The screenshot shows the Salesforce Report Builder interface. The top navigation bar includes 'Vehicle Management', 'Accounts', 'Contacts', 'Dashboards', 'Opportunities', and 'Reports'. The 'Reports' tab is selected, and a search bar is visible. Below the navigation bar, the report title 'New Contacts & Accounts Report' is displayed, along with buttons for 'Add Chart', 'Save & Run', 'Save', 'Close', and 'Run'. The main area shows a preview of the report data, which is a table with columns: Salutation, First Name, Last Name, Title, Account Name, and Mailing Street. The table contains 12 rows of data. On the left side, there is a sidebar with 'Outline' and 'Filters' sections. The 'Columns' section lists the columns included in the report: Salutation, First Name, Last Name, Title, Account Name, and Mailing Street. The 'Filters' section shows 'GROUP ROWS' and 'Add group...'.

	Salutation	First Name	Last Name	Title	Account Name	Mailing Street
1	Ms.	Rose	Gonzalez	SVP, Procurement	Edge Communications	313 Constitution Place Austin, TX 78767 L
2	Mr.	Sean	Forbes	CFO	Edge Communications	312 Constitution Place Austin, TX 78767 L
3	Mr.	Jack	Rogers	VP, Facilities	Burlington Textiles Corp of America	525 S. Lexington Ave
4	Ms.	Pat	Stumuller	SVP, Administration and Finance	Pyramid Construction Inc.	2 Place Jussieu
5	Mr.	Andy	Young	SVP, Operations	Dickenson p/c	1301 Hoch Drive
6	Mr.	Tim	Barr	SVP, Administration and Finance	Grand Hotels & Resorts Ltd	2335 N. Michigan Avenue, Suite 1500 Chicago
7	Mr.	John	Bond	VP, Facilities	Grand Hotels & Resorts Ltd	2334 N. Michigan Avenue, Suite 1500 Chicago
8	Ms.	Stella	Pavlova	SVP, Production	United Oil & Gas Corp.	1303 Avenue of the Americas New York, NY 1
9	Ms.	Lauren	Boyle	SVP, Technology	United Oil & Gas Corp.	1304 Avenue of the Americas New York, NY 1
10	Ms.	Babara	Levy	SVP, Operations	Express Logistics and Transport	620 SW 5th Avenue Suite 400 Portland, Orego
11	Mr.	Josh	Davis	Director, Warehouse Mgmt	Express Logistics and Transport	621 SW 5th Avenue Suite 400 Portland, Orego
12	Ms.	Jane	Grey	Dean of Administration	University of Arizona	888 N Euclid Halls Center, Room 501 Tuc

Create Report:

1. Go to Reports and click New
2. Select the opportunities report type and click Start Report.
3. Click on add column ,add Opportunity Owner, Opportunity Name and remove all others
4. Add Group Rows Select Journey Start Date ,Journey End Date
5. Click Save.
6. Click on Report drop down and Select Joined Report, click on apply
7. Click on Add Block
8. Select All From Category And Select Customer Details then Click on Add Block
9. Add opportunity Owner in Group Across Blocks
10. Save your report as Opportunities Details And Select Private report.

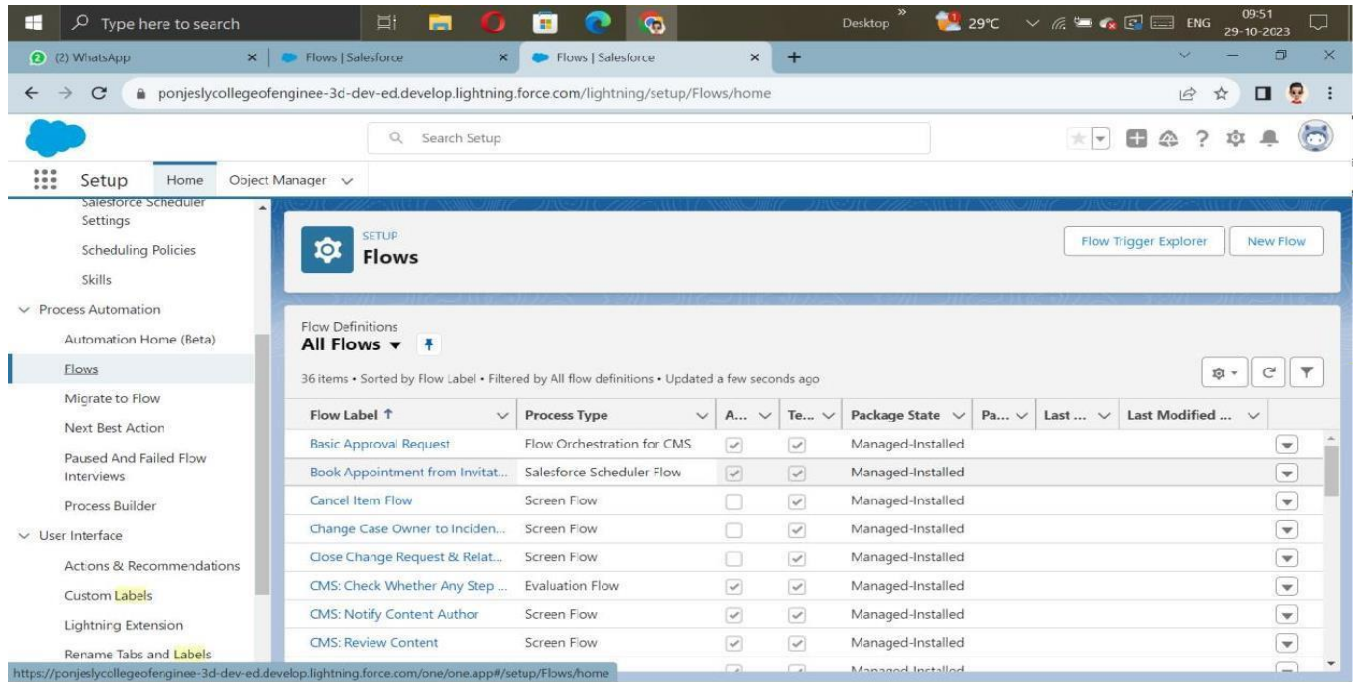
Milestone10: Dashboards



Create Dashboard:

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

Milestone11:ApprovalProcess



Creation Of Approval Process:

Select Process Automation|

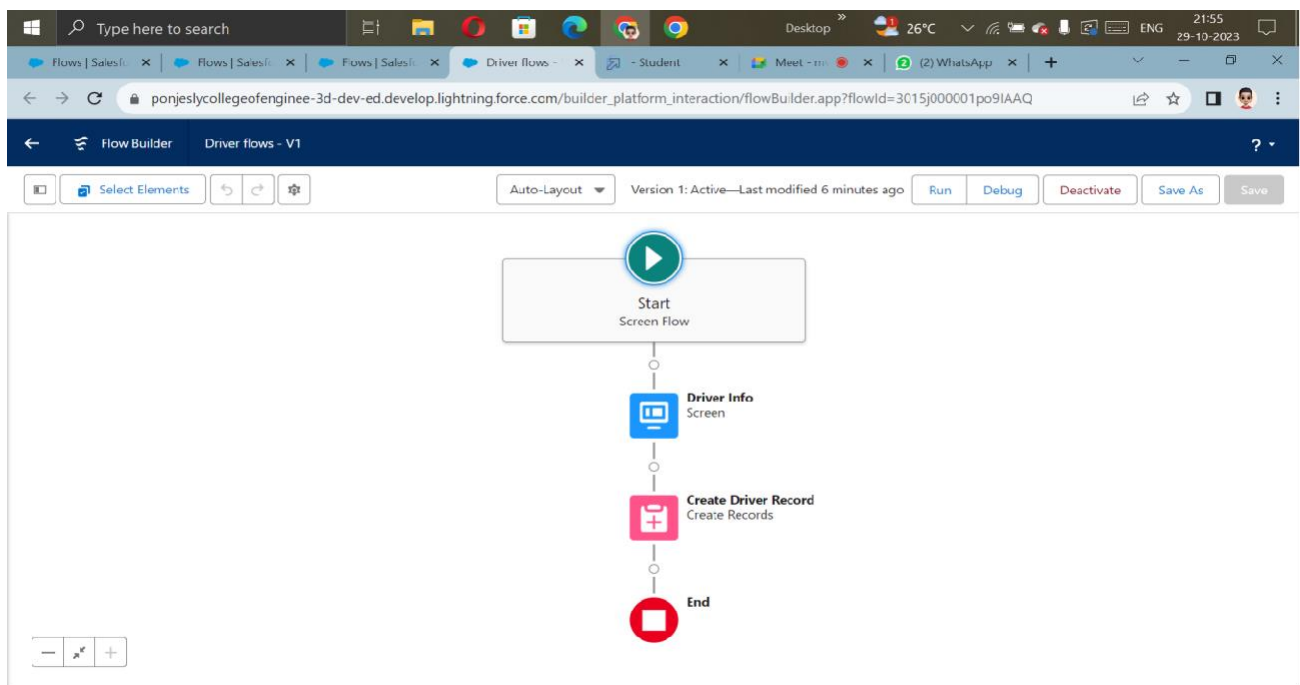
1. Approval Processes (or use the Quick Find and search for Approval Processes)
2. In the Manage Approval Processes For list , select Driver.
3. Click Create New Approval Process and select Use Jump Start Wizard.
4. Enter the following parameters
5. Click on next.
6. Select Manager from drop down and Click on next.
7. Click on next.

8. Move Driver Name ,Owner, Fair per hour, Mobile No to selected Field sand click

9. Move Driver owner to Allowed Submitters and save

10. Click on Save.

Milestone12: ScreenFlow



Creation Of Screen Flow:

1. Click on Gear icon and select setup
2. In Quick find Box enter flow and select the flows
3. Click on New flow and Select Screen flow
4. It will open the canvas. Select(+)
5. It will open the dialog box. Now give the label name and a pin name will be auto populated. These labels are for your screen Element

Label: Driver Info

API Name: Driver_ Info(This field will be auto populated.)

Label : Licence No

API Name : Licence _No(This field will be auto populated.)

Label :Mobile No

API Name: Mobile _No(This field will be auto populated.)

Label :Create Driver Record

API Name :Create _Driver _Record

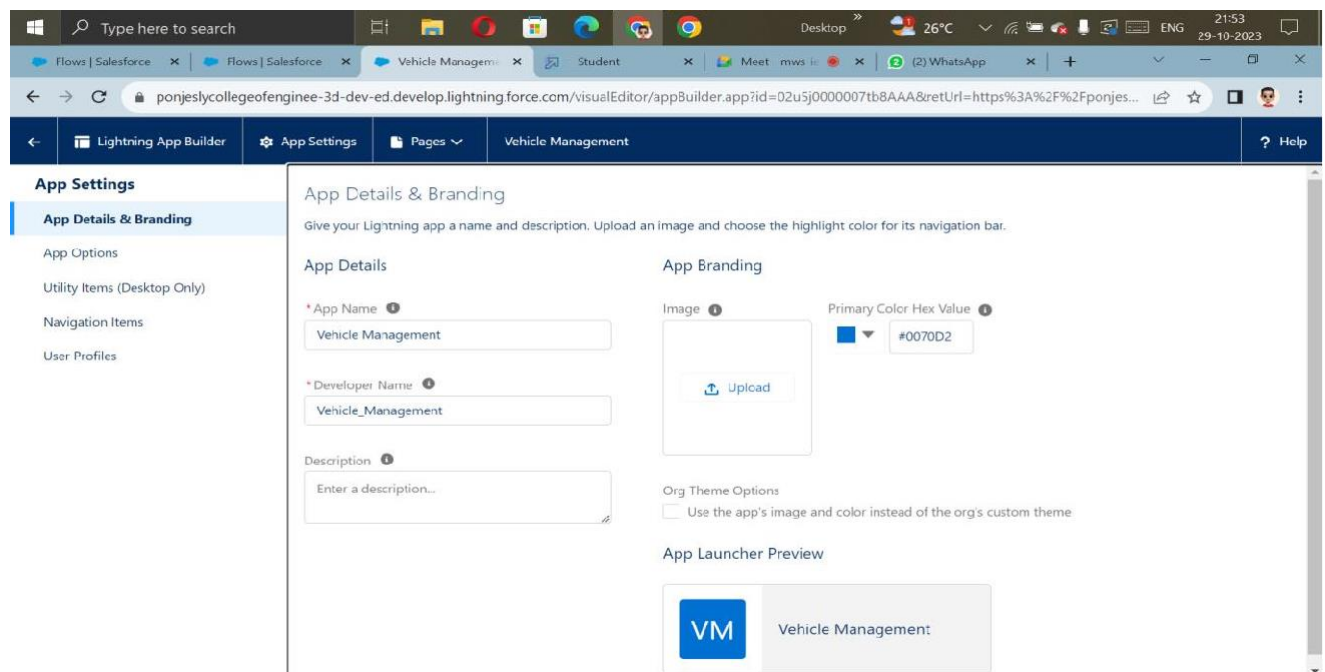
6. Click on Done

7. Click on Save. It will open you details canvas and give the details as follows

8. Click on save

9. Click on the Activate.

Milestone13: App Page



DemoVideoLink:

https://drive.google.com/drive/folders/1nRk0cr8G5J5g-uI_QcHFoYy6eyPWB1I1

Trail Head URL:

Team Leader :Abel Kalins A

<https://www.salesforce.com/trailblazer/abelkalins>

Team Member 1: Jesmilan J

<https://www.salesforce.com/trailblazer/jesmilan.j>

Team Member 2: Sreegar KPJ

<https://www.salesforce.com/trailblazer/sreegarkpj>

Team Member 3: Sutheesh C

<https://www.salesforce.com/trailblazer/sutheeshc>

Team Member 4: Abhishai U

<https://www.salesforce.com/trailblazer/abhishaiu>

