VEHICLE MANAGEMENT SYSTEM USING SALESFORCE

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Team Size : 4

Team Leader : MAGESHWARI.E

Team member : KOMATHI.R

Team member : SHARMILA.B

Team member : SWATHI.R

Recruiting assistance for the HR managers

In this project, we use custom objects, relationships, page layouts to give the HR team easy access to data they need on an existing recruitment app.

To make the existing app more efficient for the HR team we create custom objects and relationships to store and access the data more efficiently. We install an unmanaged package in the org to get metadata that acts as existing data in the recruitment app.

https://trailhead.salesforce.com/content/learn/projects/build-a-data-model-for-a-recruiting-app

Milestone 1: Creation of developer account

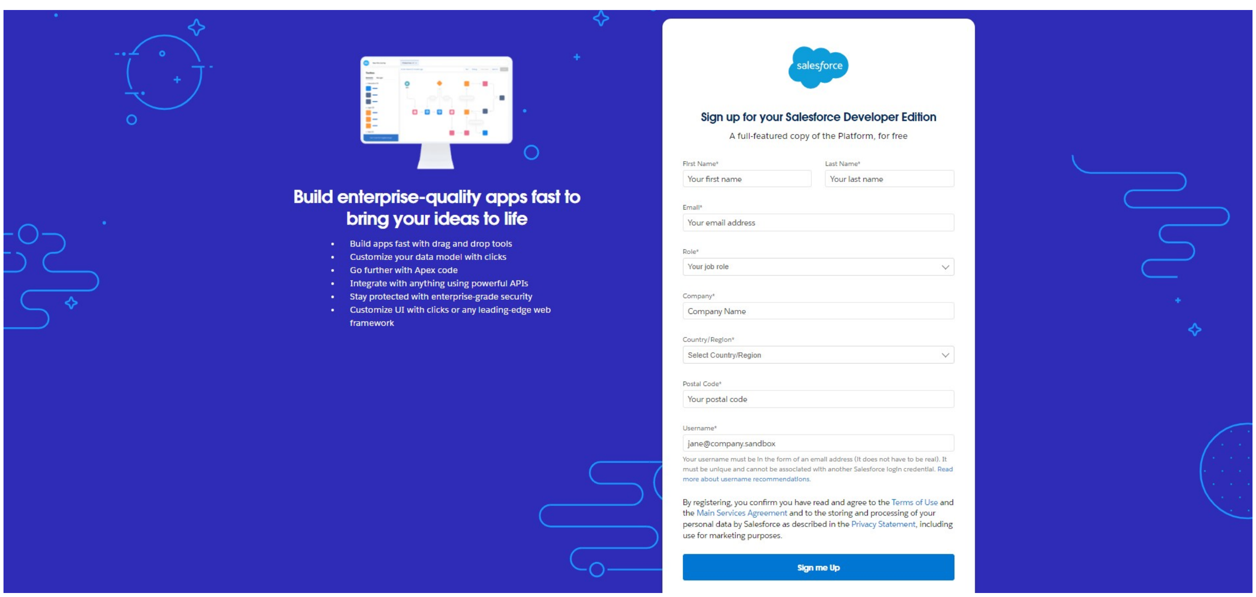
Create your Salesforce Developer Org to get Started

In order to start with this project you need to have a free salesforce developer account.

Activity-1

A Developer org has all the features and licenses you need to get started with Salesforce.

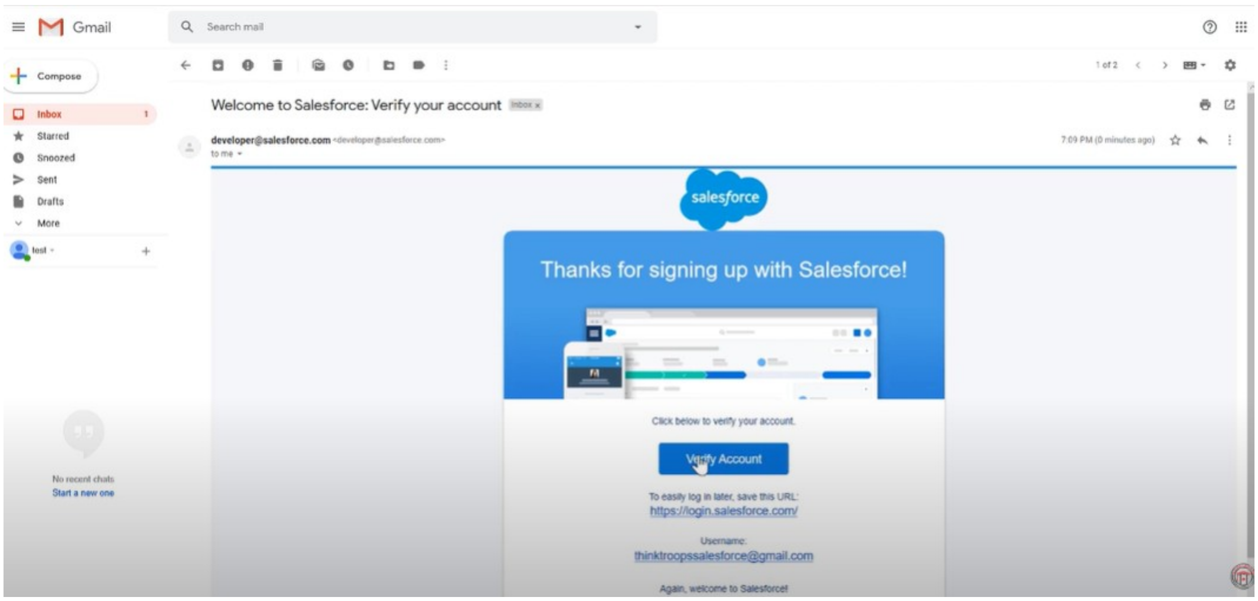
1. Search Developer.salesforce.com



2.Enter the following details like First name, last name, Email, Role, Company, Country/Region, Postal code, and Username must be unique.

3. Click sign me up, After a few min you will reserve a mail salesforce org and by using the

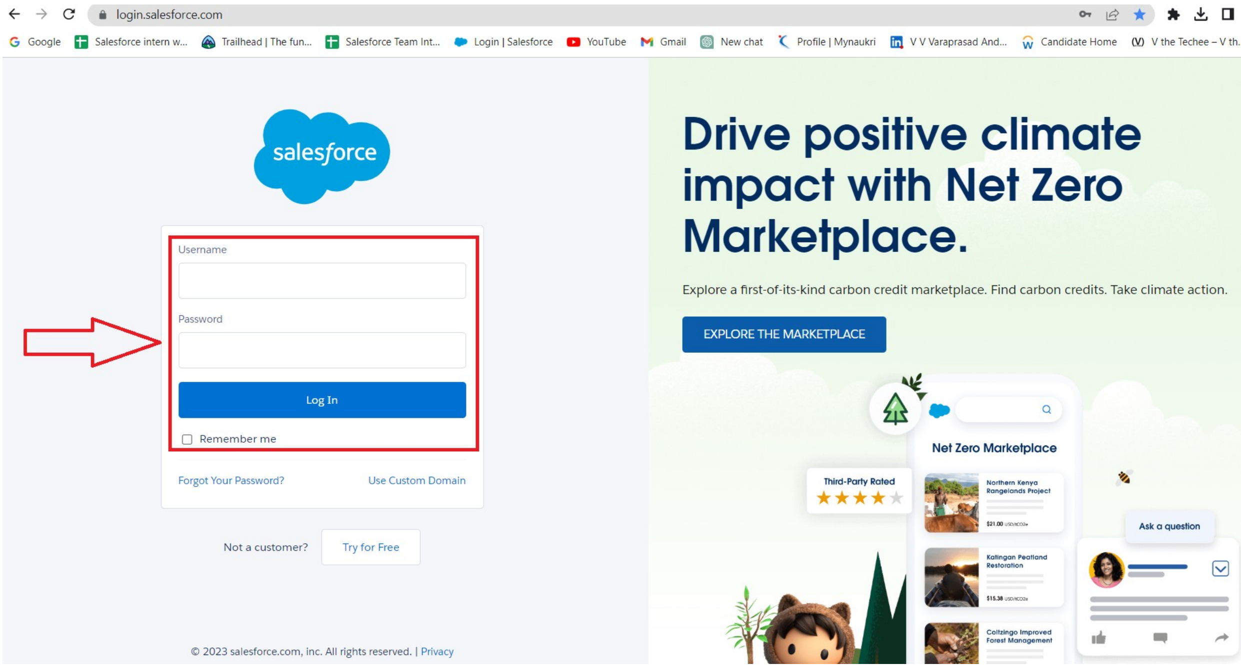
verify account link you can create your new password.



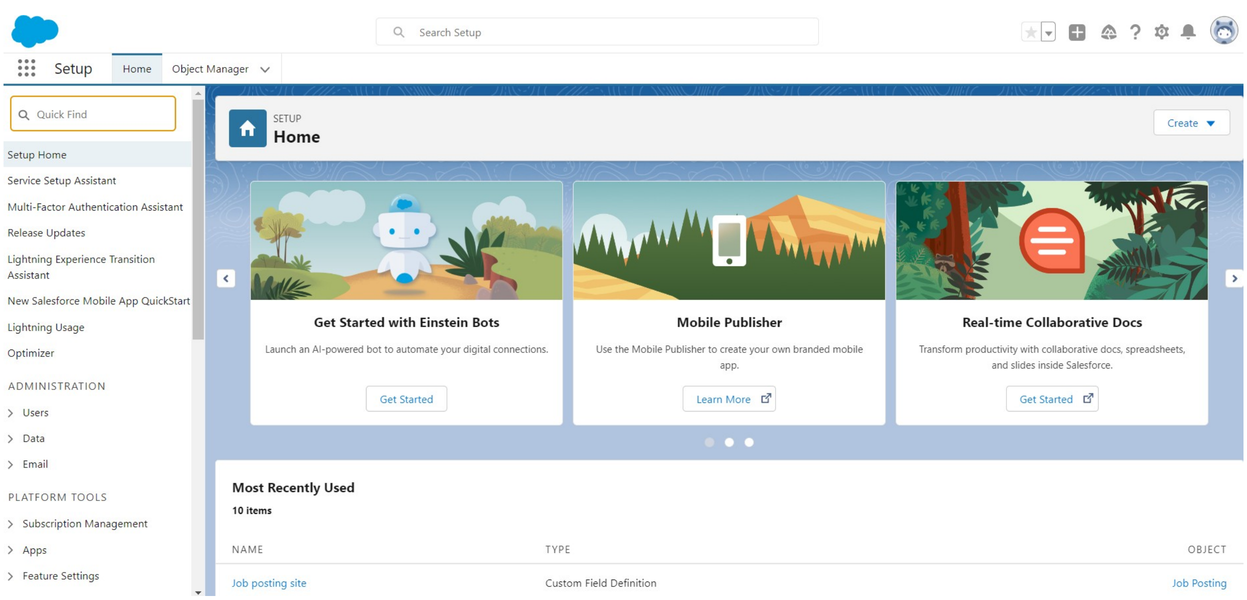
4. Click save.

5. Search login.salesforce.com

6. By using username and password you can into the salesforce org.



The setup page will appear as below.



Create a developer org and login with your login credentials.

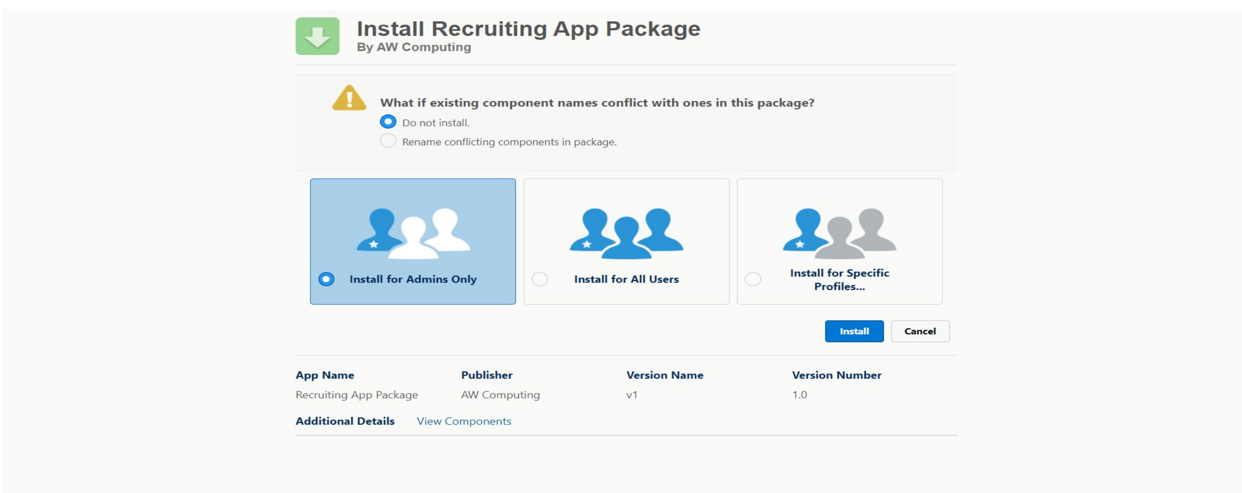
Milestone 2 : Package installation

Package installation for Recruiting App

In Salesforce, a package is a collection of Apex classes, triggers, Visualforce pages, and other components that can be installed into an organization. There are two types of packages: managed and unmanaged. Managed packages are developed and distributed by ISVs (Independent Software Vendors) and can be installed from the Salesforce AppExchange, while unmanaged packages are created and distributed by Salesforce administrators within an organization. To install a package, an administrator can navigate to the AppExchange, find the desired package, and click the "Install" button. The administrator will then be prompted to log in to their Salesforce organization and provide permission to install the package.

click to launch the App Launcher, then click **Playground Starter** and follow the steps

1. Click the install a package tab.
2. Paste `04t0P000000N9rs` into the field.
3. Click install.
4. Select install for admins only,



Milestone 3: Object

What is an object?

Salesforce objects are database tables that permit you to store data that is specific to an organization. It consists of fields (columns) and records (rows).

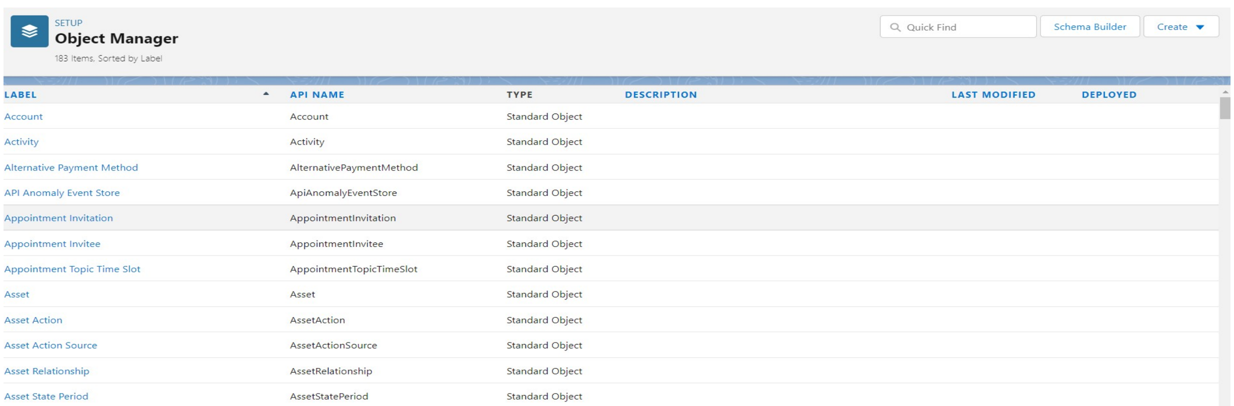
Salesforce objects are of two types:

- Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

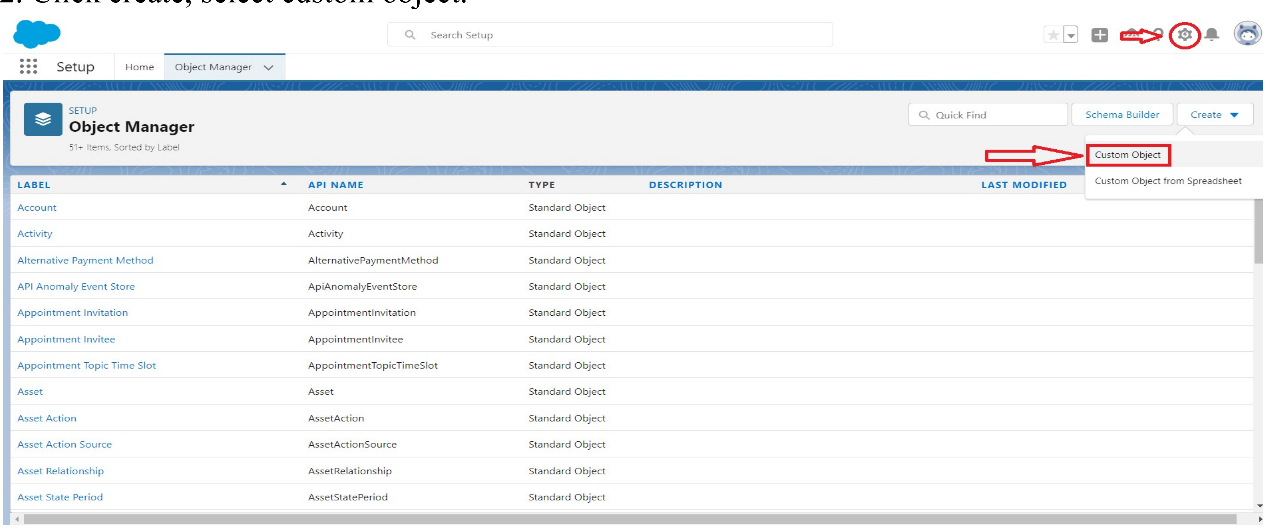
Activity-1

Create a custom object for Job Posting Sites

To create a custom object, follow these steps :
1. From setup click on object manager.

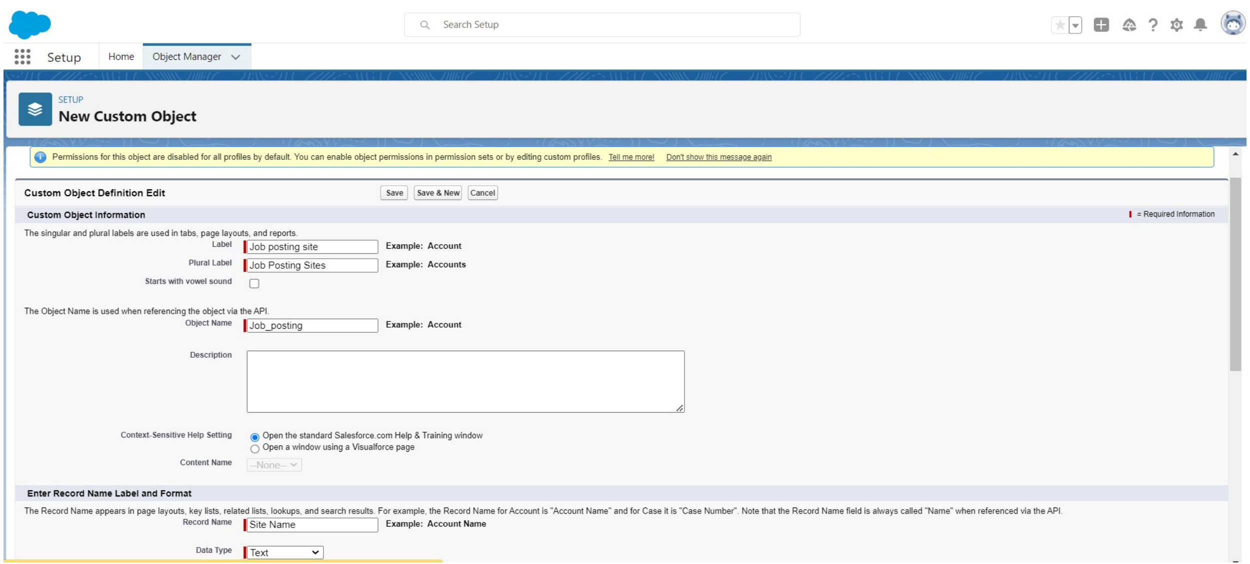


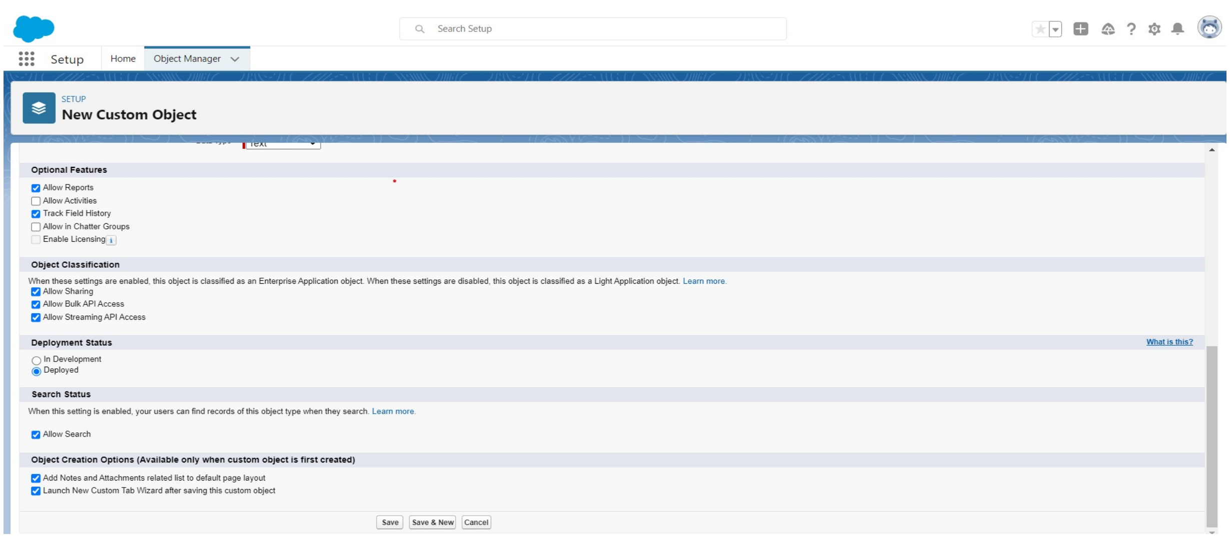
2. Click create, select custom object.



3. Fill in the label as "Job Posting Site".
4. Fill in the plural label as "Job Posting Sites".
5. Record name : "Site Name"

6. Select the data type as "Text".
7. In the Optional Features section, select Allow Reports and Track Field History. 8. In the Deployment Status section, ensure Deployed is selected.
9. In the Search Status section, select Allow Search.
10. In the Object Creation Options section, select select these options:
 Add Notes and Attachments related list to default page layout
 Launch New Custom Tab Wizard after saving this custom object





11. Leave everything else as is, and click Save.

Activity-2

Create a custom object for reviews

To create a custom object, follow these steps :

1. From setup click on object manager.
2. Click create, select custom object.
3. Fill in the label as "Review".
4. Fill in the plural label as "Reviews".
5. Record name : "Review Number"
6. Select the data type as "Auto Number".
7. Under display format enter "REV-{0000}".
8. Enter the starting number as 1.
9. In the Optional Features section, select Allow Reports and Track Field History.
10. In the Deployment Status section, ensure Deployed is selected.
11. In the Search Status section, select Allow Search.
12. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
13. Leave everything else as is, and click Save.

<u>Milestone 4 : Tabs</u>

What is Tab?

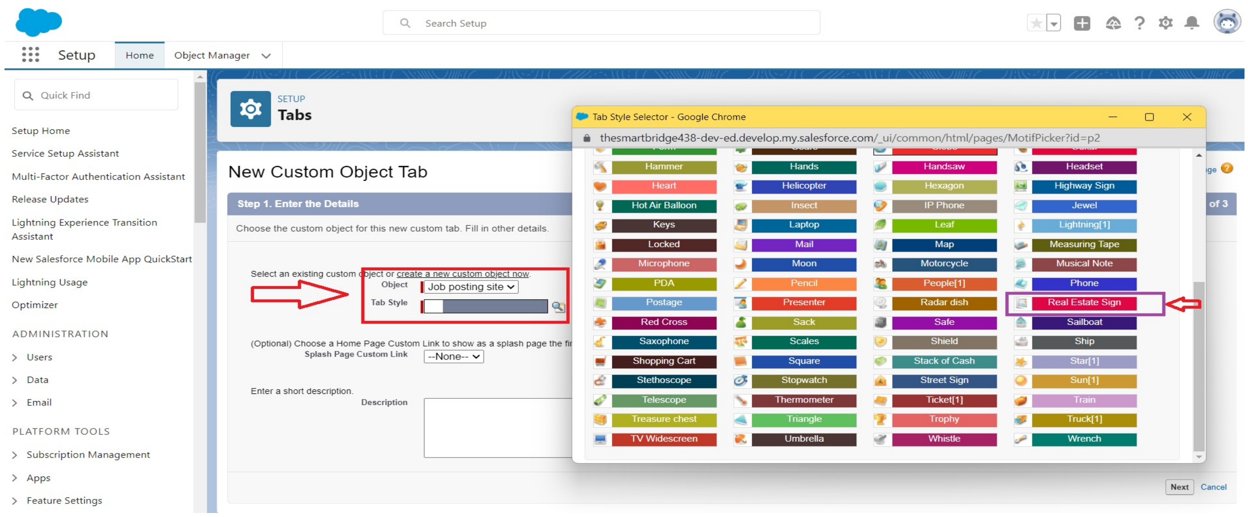
In Salesforce, a tab is a user interface element that allows users to navigate to different sections of the platform, such as Accounts, Contacts, Leads, and Opportunities. Tabs can also be used to access custom objects and custom pages. They are typically located at the top of the screen and can be customized to fit the needs of the organization.

Activity :

How to create a tab

As we selected to launch a custom tab wizard in step 10, a custom tab wizard appears wherein we customize the look of the Job posting site object's tab. To do that :

1. To Select the Tab Style: Click the magnifying glass and select Real Estate



2. Click Next.
3. Leave the profile as is and click Next.
4. In the Add to Custom Apps section:
5. Deselect Include Tab.
6. Select Append tab to users' existing personal customizations.
7. Click Save.

<u>Milestone 5 : Fields</u>

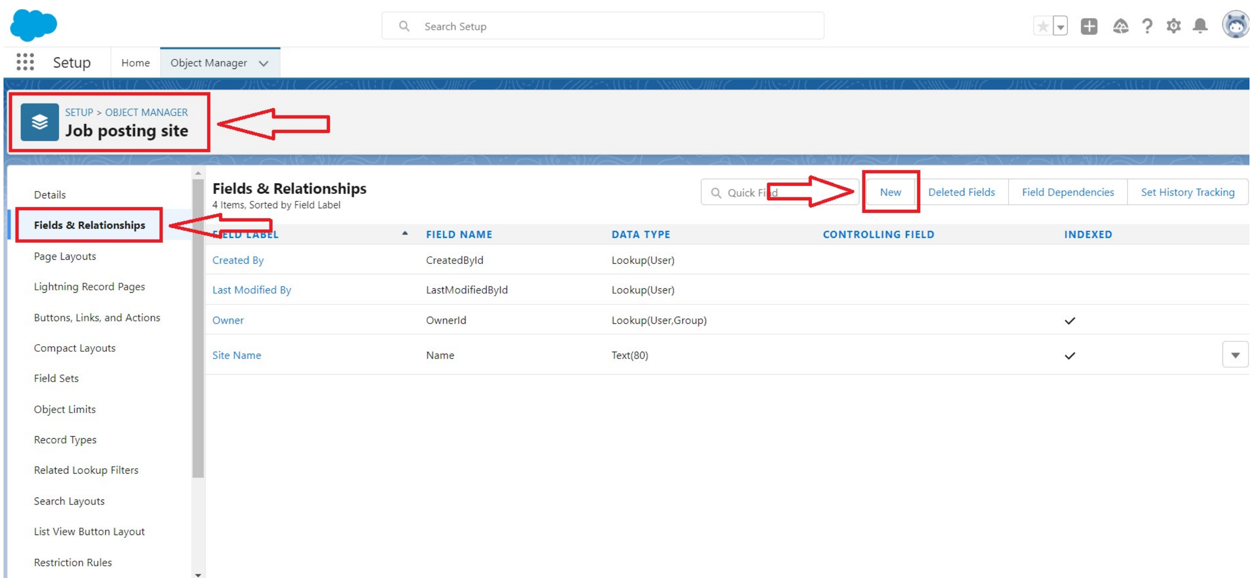
What are fields?
Fields in Salesforce represents what the columns represent in relational databases. It can store data values which are required for a particular object in a record.
There are 2 types of fields in salesforce:

- Standard fields: There are four standard fields in every custom object that are Created By, Last Modified By, Owner, and the field created at the time of the creation of an object. These fields cannot be deleted or edited and they are always required. For standard objects, the fields which are present by default in them and cannot be deleted from standard objects are standard fields.
- Custom fields: The Custom fields which are added by the administrator/developer to meet the business requirements of any organization. They may or may not be required.

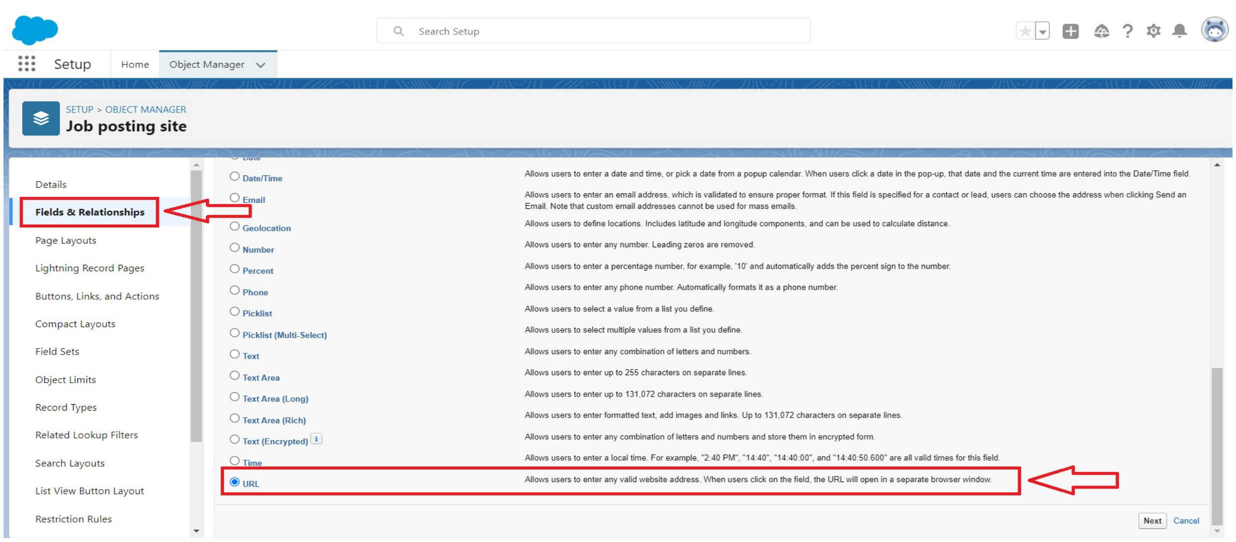
Activity-1
Create New Field for Job Posting site

From the object manager, click on the job posting site, then click on Fields & Relationships.

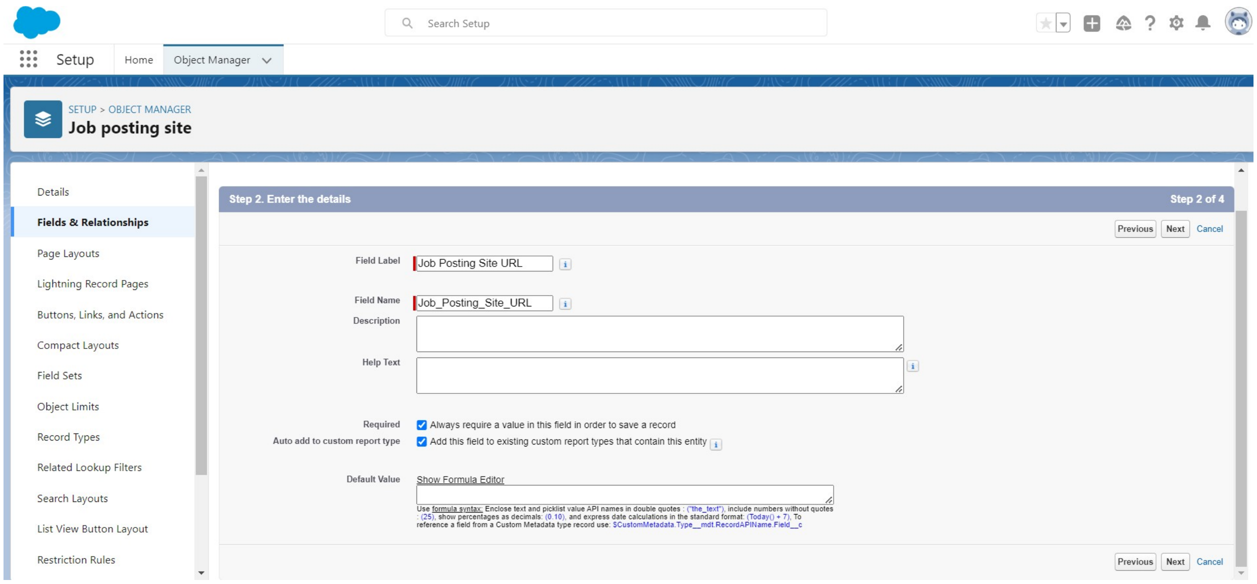
1. Click on new.



2. Select the data type as URL.



3. Click Next.
4. For Field Label, enter the Job Posting Site URL.



5. Click Next, Next, and click Save & New.

Create a Fields for Job Posting site

1. Status
2. Technical site
3. Description

Note: Follow the steps Create the left over fields

1. Status
2. Technical site
3. Description

Milestone 6 : Junction Object

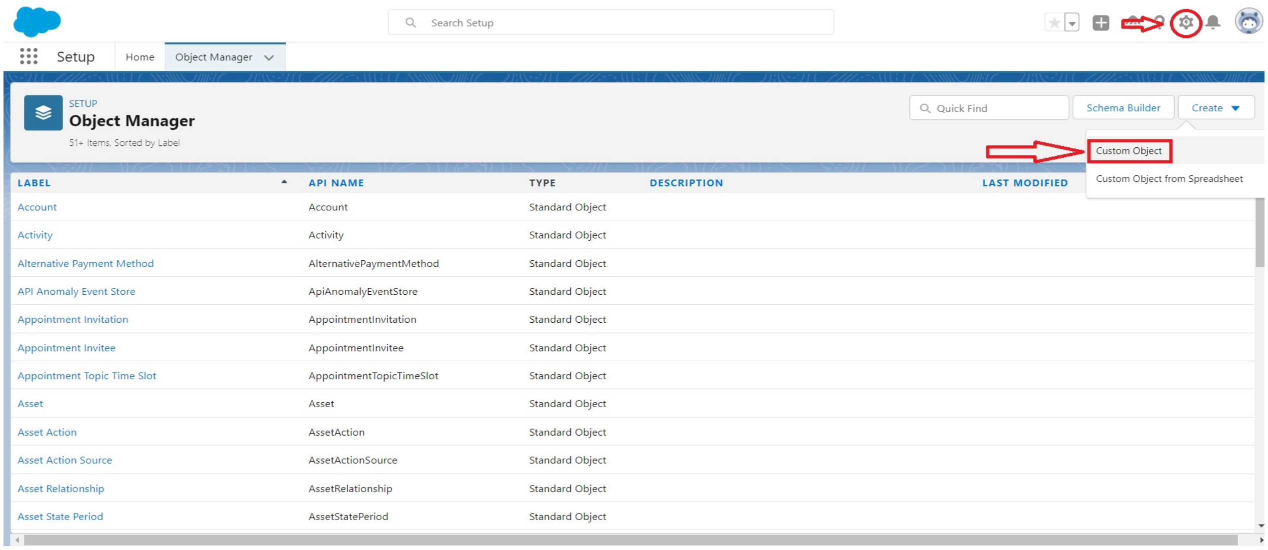
What is a Junction Object?

In Salesforce, a junction object is a custom object that is used to create a many-to-many relationship between two other objects. It connects two objects together by creating two one-to-many relationships, allowing data from both objects to be associated with each other in a single record. For example, if you have a custom object for "Projects" and another for "Teams," a junction object could be used to connect individual team members to multiple projects.

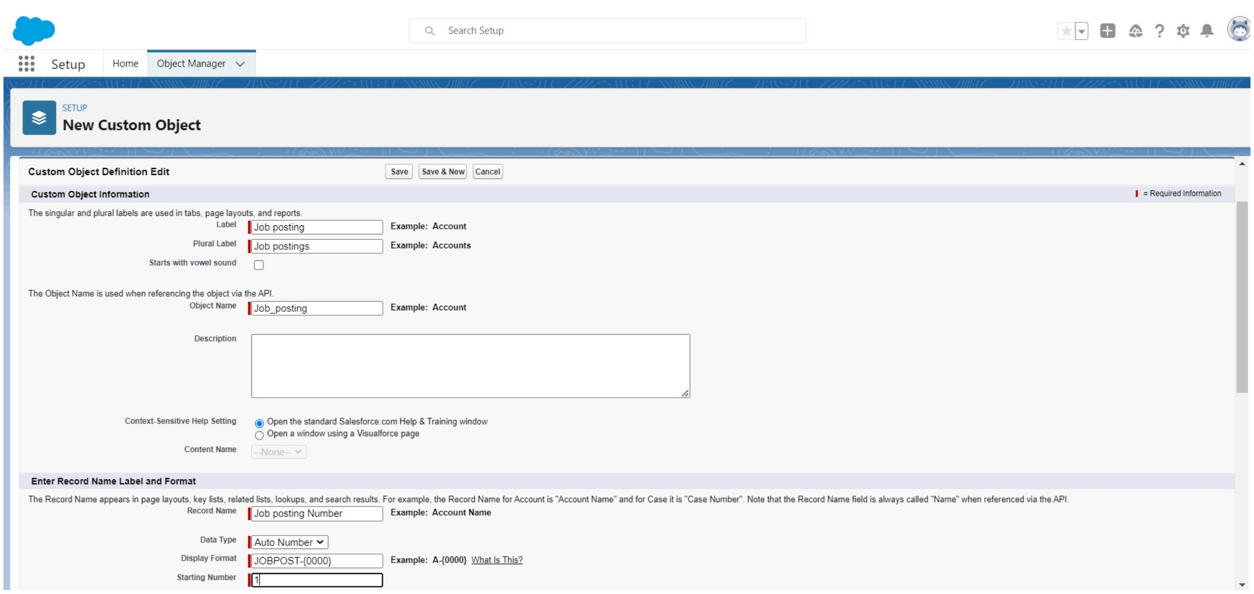
Activity

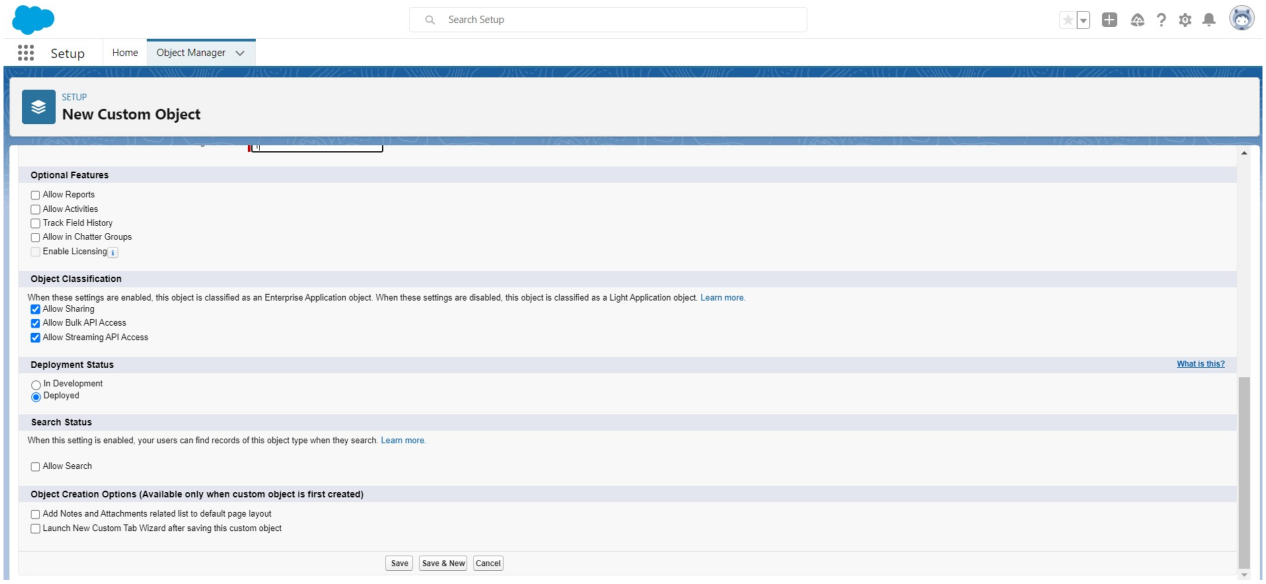
Creating a custom junction object :

1. From setup, click object Manager.
2. Click create, select custom object.



3. Enter the label as "Job posting".
4. Enter the plural label as "Job postings".
5. Enter the record name as "Job posting number".
6. select the data type as "Auto Number".
7. Enter the display format as "JOBPOST-{0000}"
8. Enter the Starting number as 1.





9. Leave everything else as is, and click save.

Activity: 2

Create a Relationships Object

Creating a master-detail relationship between Job posting and job posting site.

1. From setup, click object manager.
2. Select Job posting object, click on field and relationships, click new.

3. Select the data type as Master-detail relationship.
4. Click Next, relate to the Job posting site.
5. Enter the label Job Posting site.
6. Click next, next, next and save.

Creating a master-detail relationship between job posting and position.

1. From setup, click object manager.
2. Select Job posting object, click on field and relationships, click new.
3. Select the data type as Master-detail relationship.
4. Click Next, relate to position.
5. Enter the label Position.
6. Click next, next, next and save.

Milestone 7: Page Layout

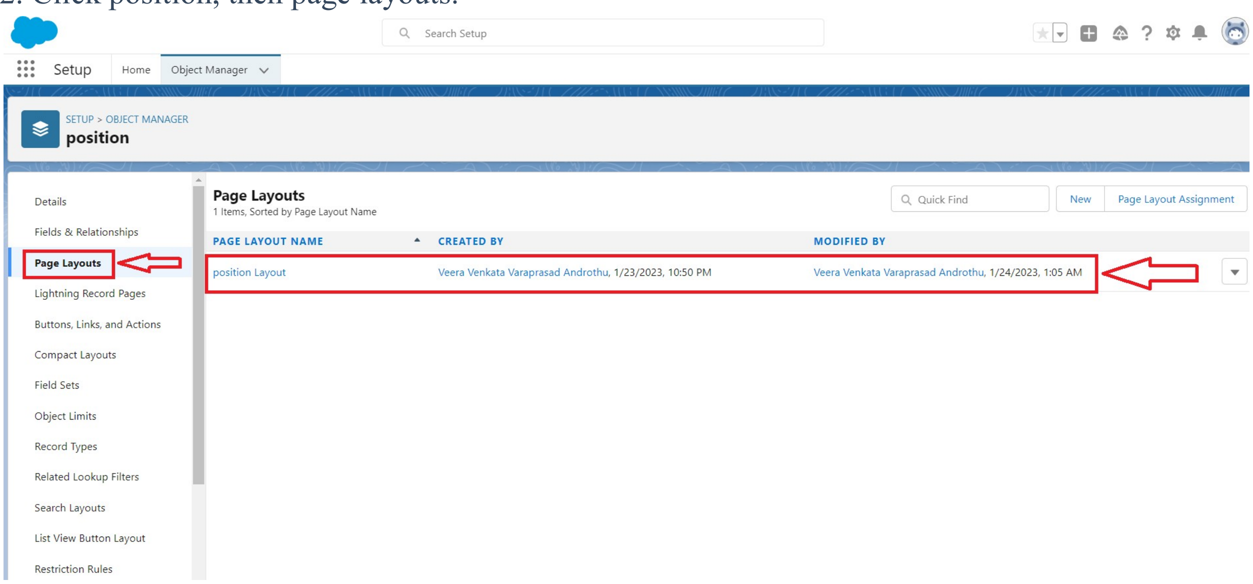
What is Page Layout?

In Salesforce, a page layout is a visual design of a page that determines the organization and arrangement of fields, buttons, and other components on a page. Page layouts can be customized to show the fields and related information that are most relevant to different users, roles, and record types. They can also be used to control the visibility and access to fields, buttons, and other components on a page.

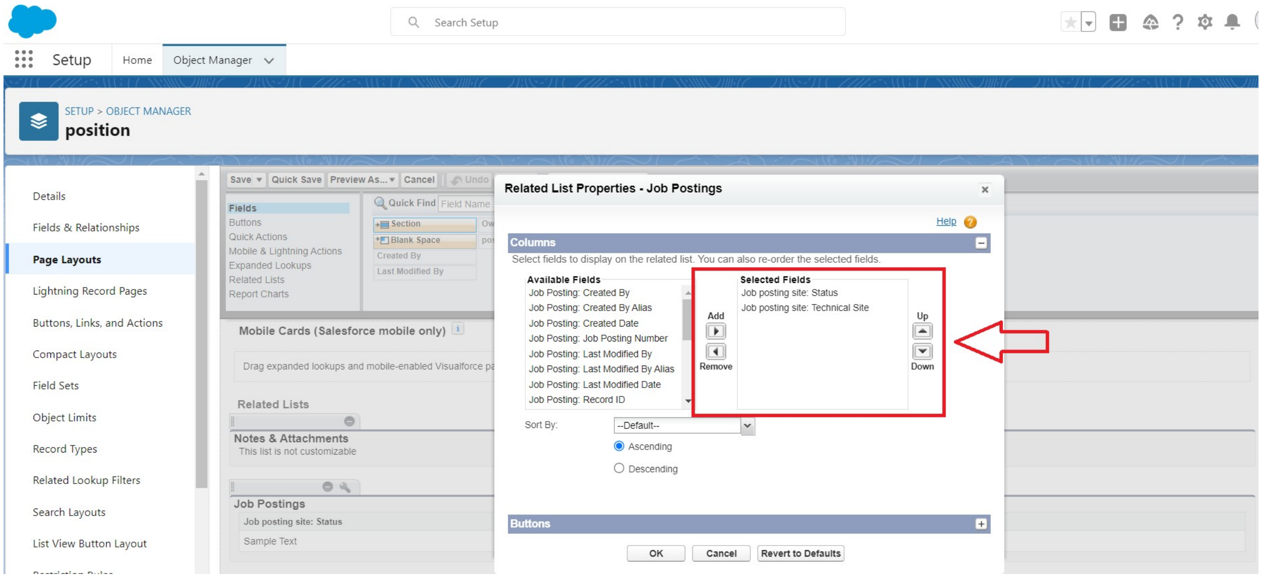
Activity-1

Modifying the page layouts :

1. From setup, click on object manager.
2. Click position, then page layouts.



3. Click down array next to the position layout and select edit.
4. Scroll down to the job posting related list, and click the wrench icon in the header to edit it.
5. From the available fields section, select
 Job posting site : Status
 Job posting site : Technical Site
6. Click add.
7. From the selected fields section, select job posting : Job posting number and click remove.



8. Click ok, then save.

Activity-2

Create a Page layout for Review Object

<u>Milestone 8 : Validation Rules</u>

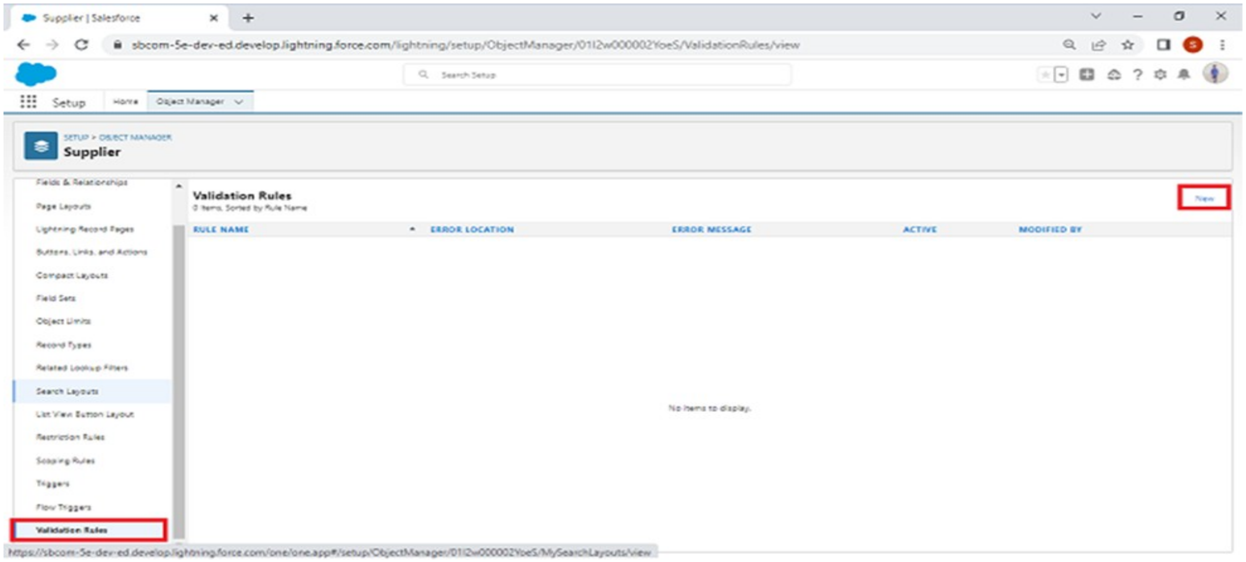
What are Validations Rules?
A validation rule is a process which checks out (validate) the inputs given by any user is correct or not according to your requirement.

Activity -1

Creating a Validation Rule:

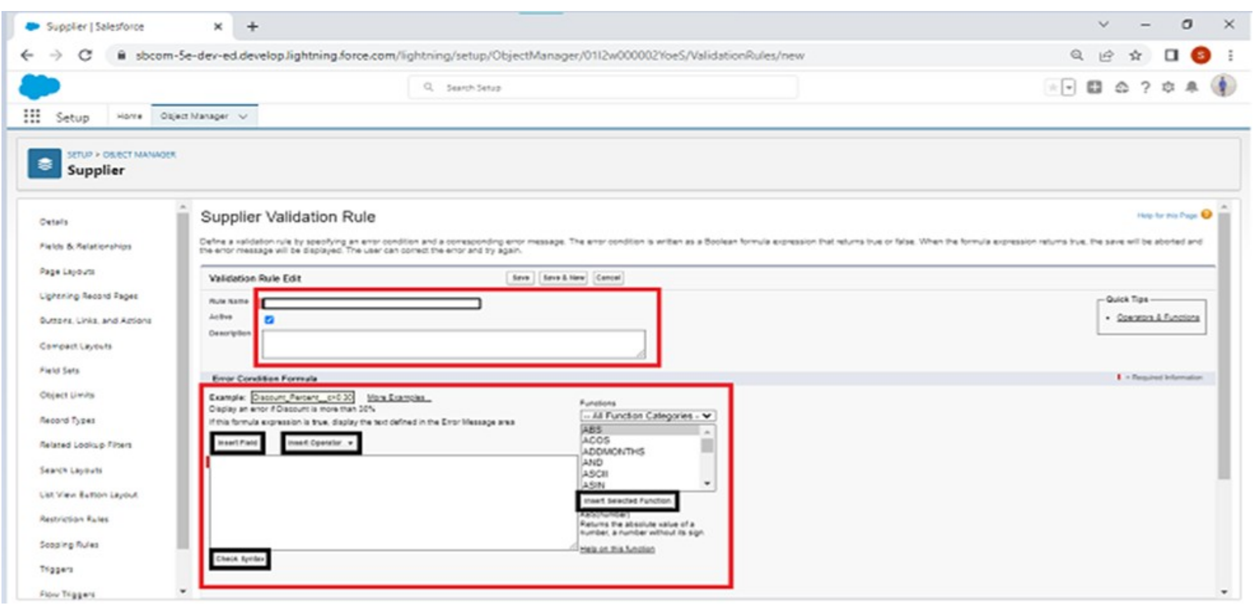
To create a validation rule:

Go to object manager, select the object on which validation rule has to be implemented, scroll down and click validation rule, New.

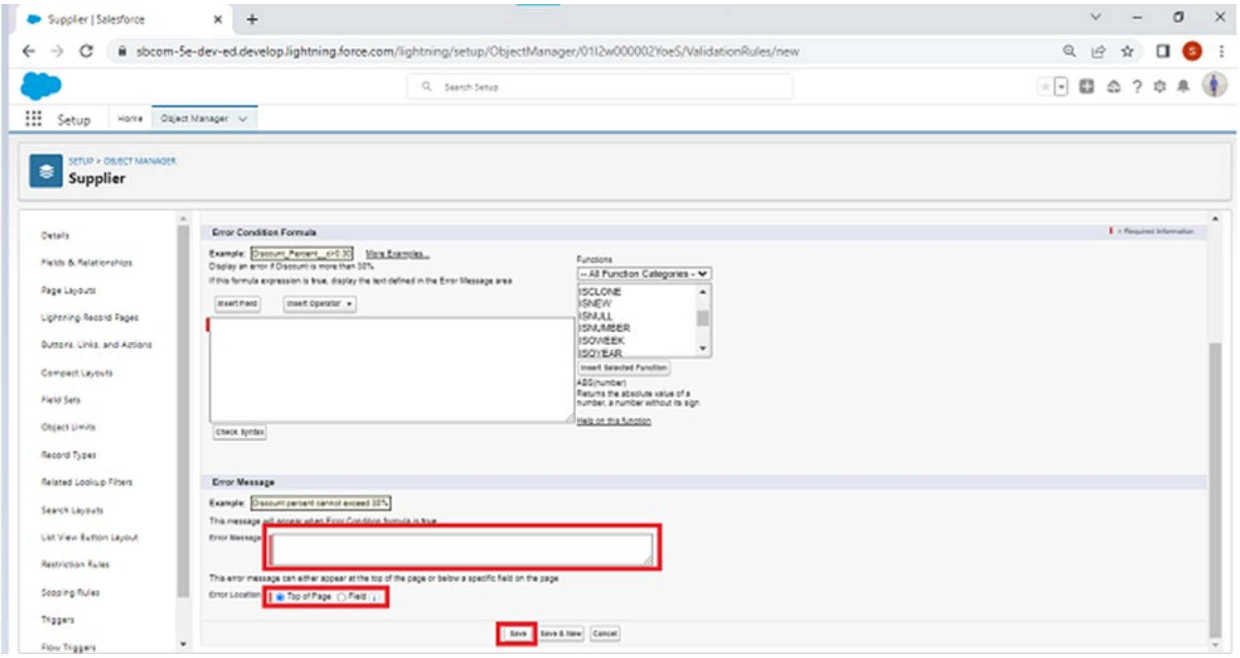


Give details as:

1. Rule name: Phone number validation rule.
2. Active: checked
3. Description: phone number should not be more than or less than 10 digits.
4. Under Error Condition Formula: write the condition using insert field, insert operator, insert function
5. Using check syntax: check if the formula you entered is valid or not.



6. Error Message: Please give a valid phone number
7. Error location: select field
8. Save



Activity-2

Create a Validation rule For Technical Site Checkbox is equal to True.

Milestone 9 : Profile

What is a profile?

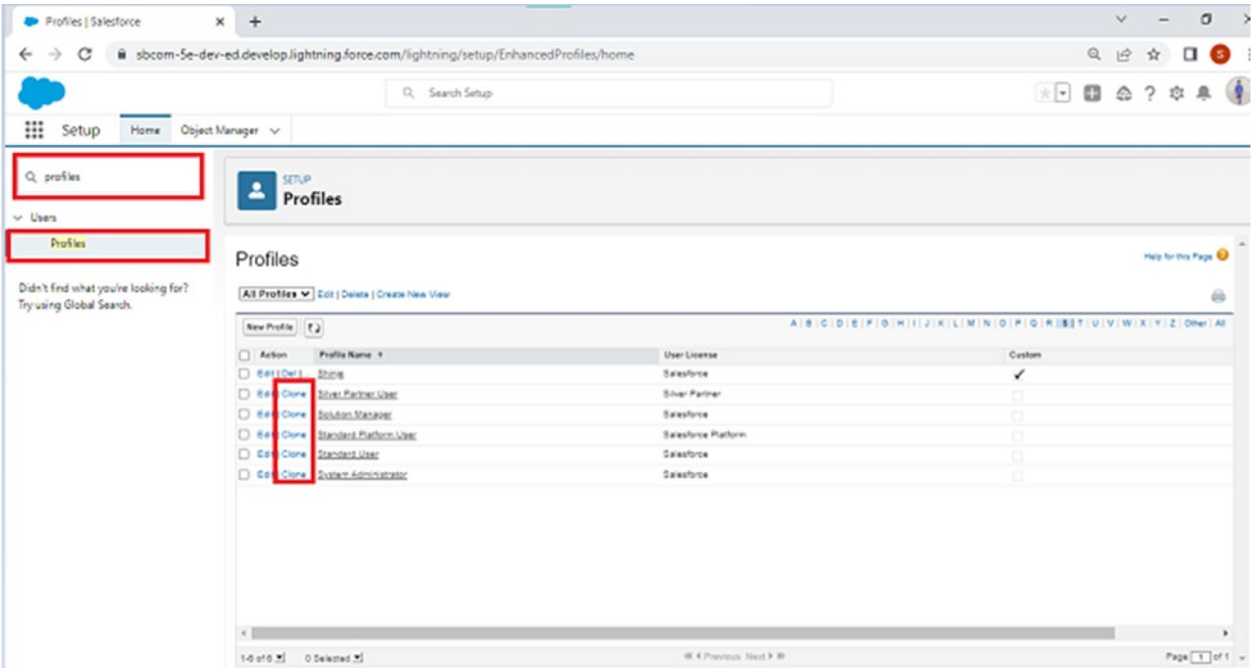
A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls "Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login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

A profile can be assigned to many users, but user can be assigned single profile at a time.

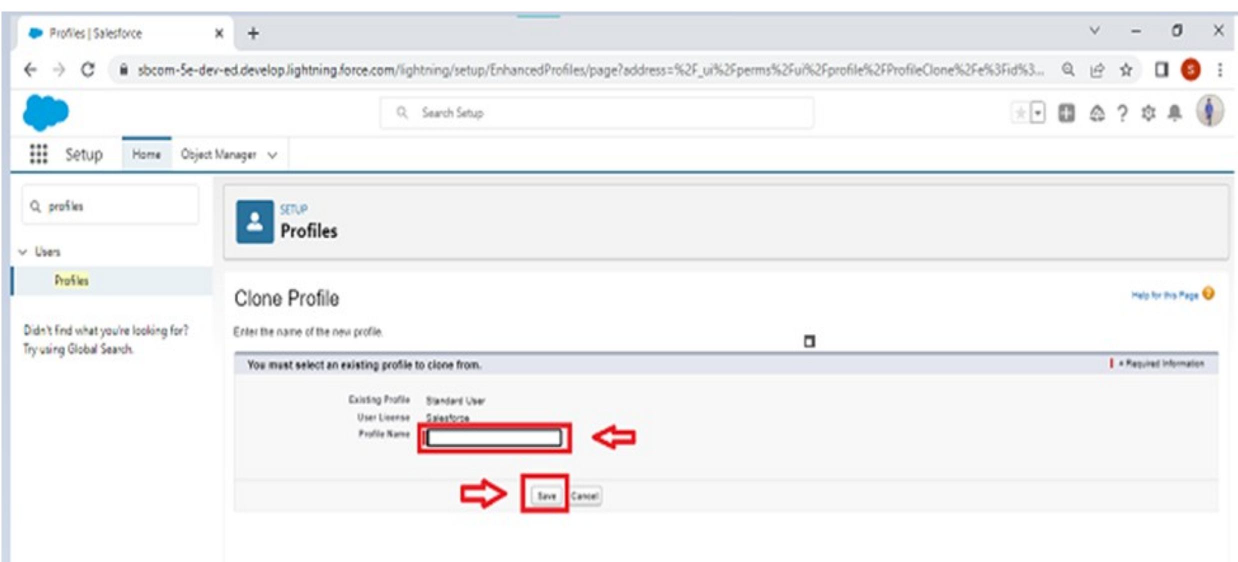
Activity

Creation on profile:

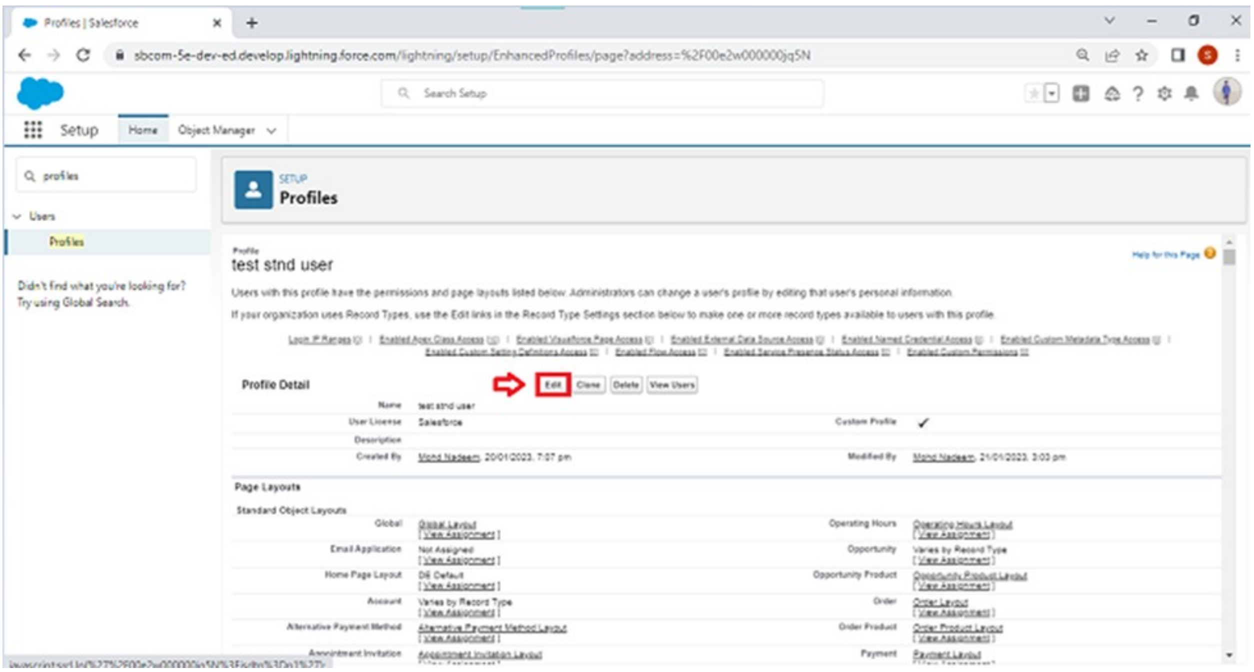
From Setup enter Profiles in the Quick Find box, and select Profiles.



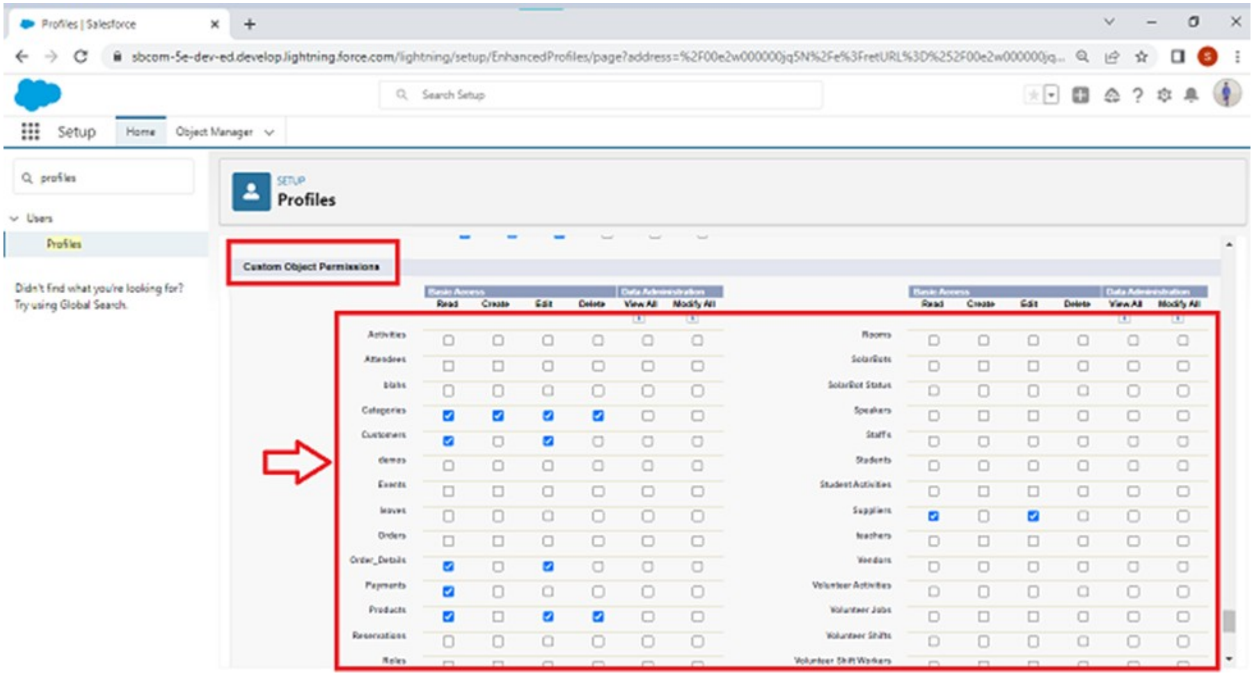
1. From the list of profiles, find Standard User.
2. Click Clone.
3. For Profile Name, enter Event user profile.
4. Click **Save**



5. While still on the Event profile page, then click Edit.



6. Scroll down to Custom Object Permissions and Give view all access permissions to the Order details, supplier, product, customer, category, payment.



Activity-2

Create a profile with the profile name as “Sales profile”.

Milestone 10: User

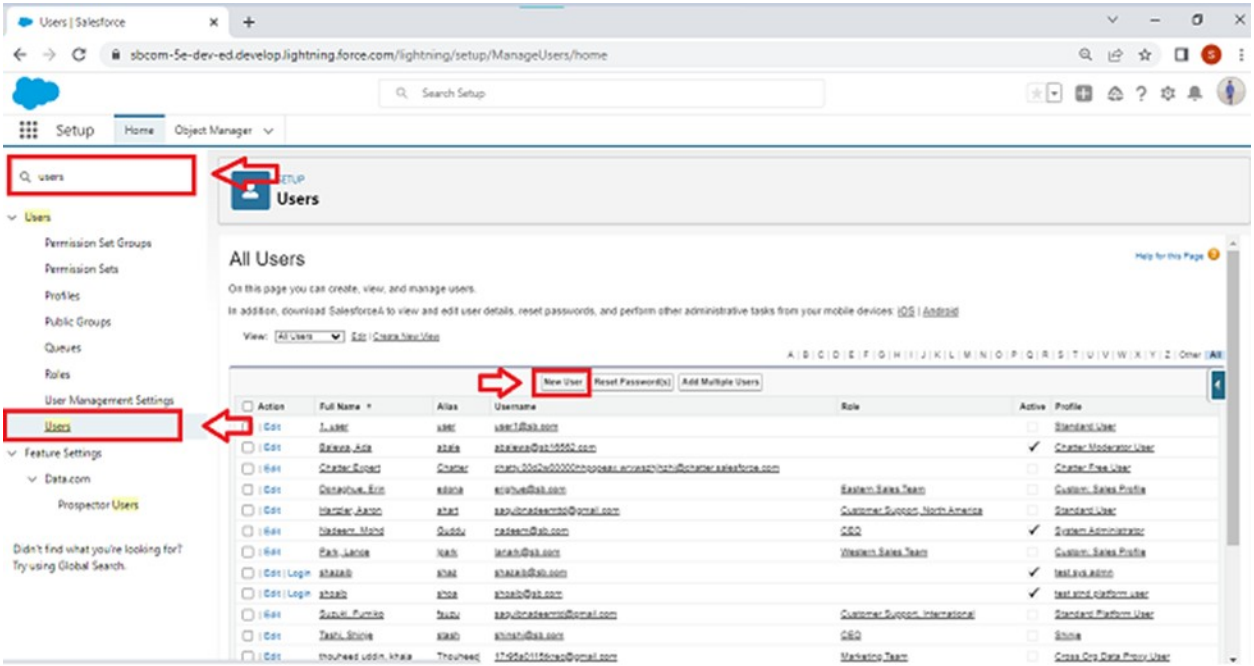
What is a user?

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. The user account identifies the user, and the user account settings determine what features and records the user can access.

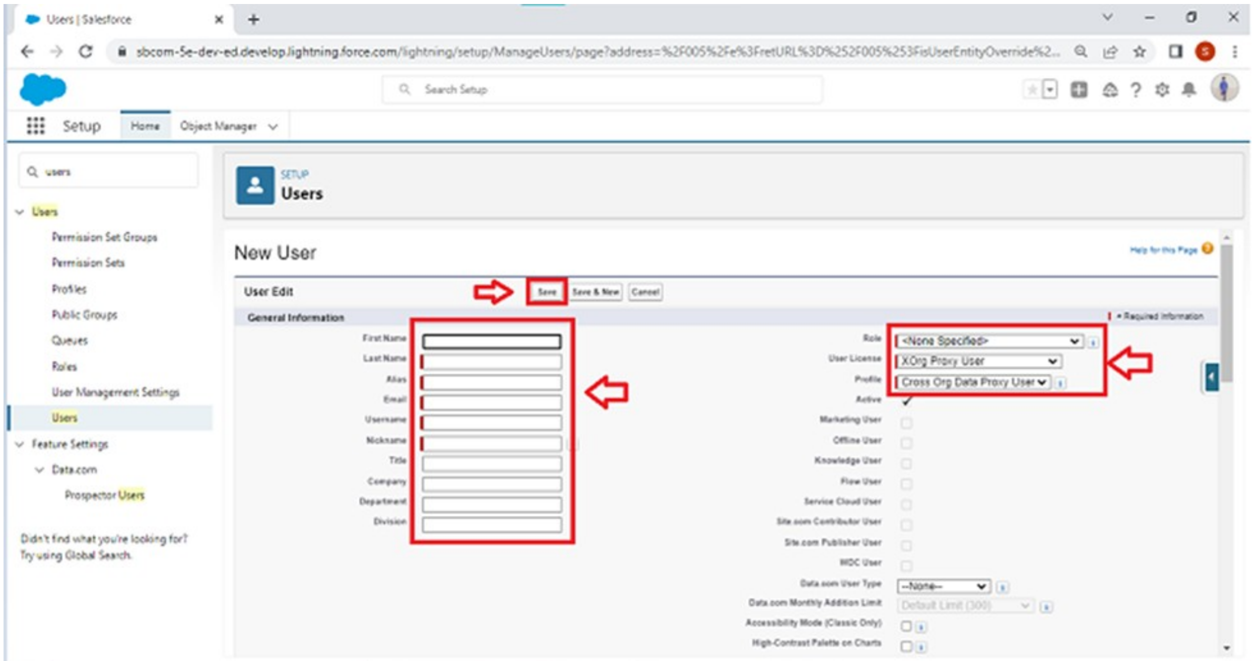
Activity-1

Creating a User:

From setup type “users” in quick find and select users, then click New User



- First Name: Sanjay
- Last Name: Gupta
- Alias: Sanj
- Email: provide your personal email id for future reference
- Username: sanjaygupta@thesmartbridge.com
- Nickname: Sanju
- Role: leave it as default
- User License: Salesforce
- Profile: Event User Profile



Activity-2

Create a user with a username as “Abhilash Garapati”, and assign him the sales profile.

Milestone 11 : Permission set

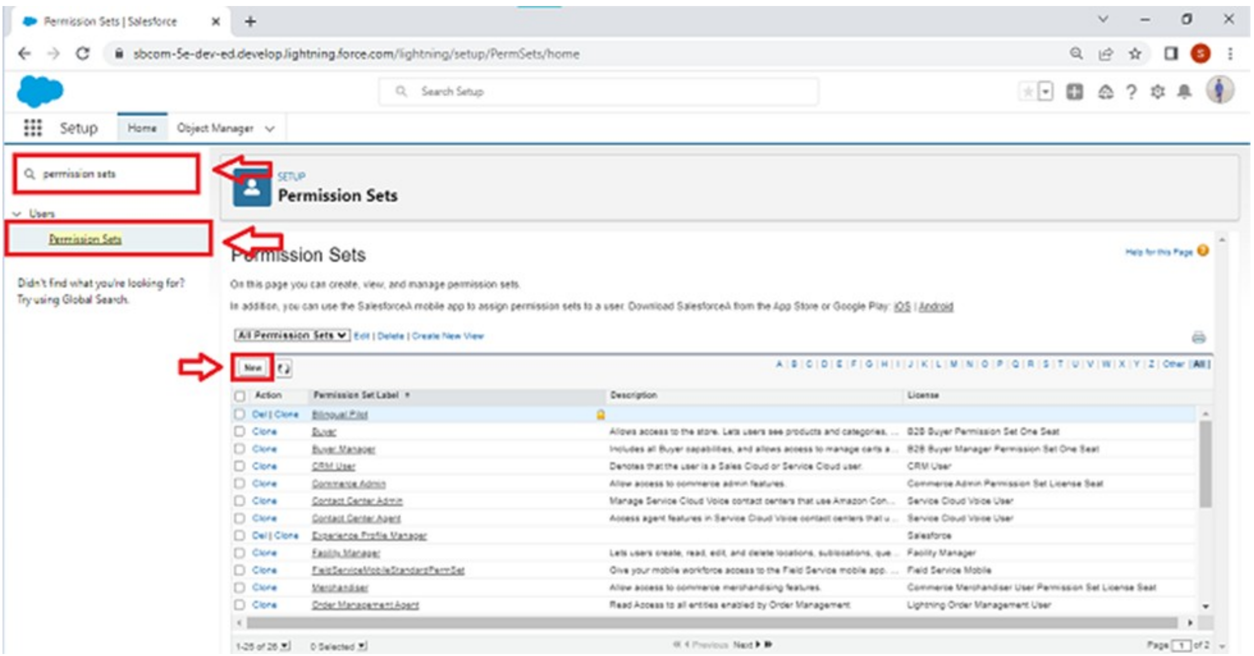
What is the Permission set?

In Salesforce, a permission set is a collection of settings and permissions that give users access to various tools and functionality in the platform. Permission sets can be used to grant additional access to users beyond what is included in their profile, without modifying the profile itself. This allows for granular control over user access and permissions within the Salesforce environment. Permission sets can be assigned to individual users or to a group of users.

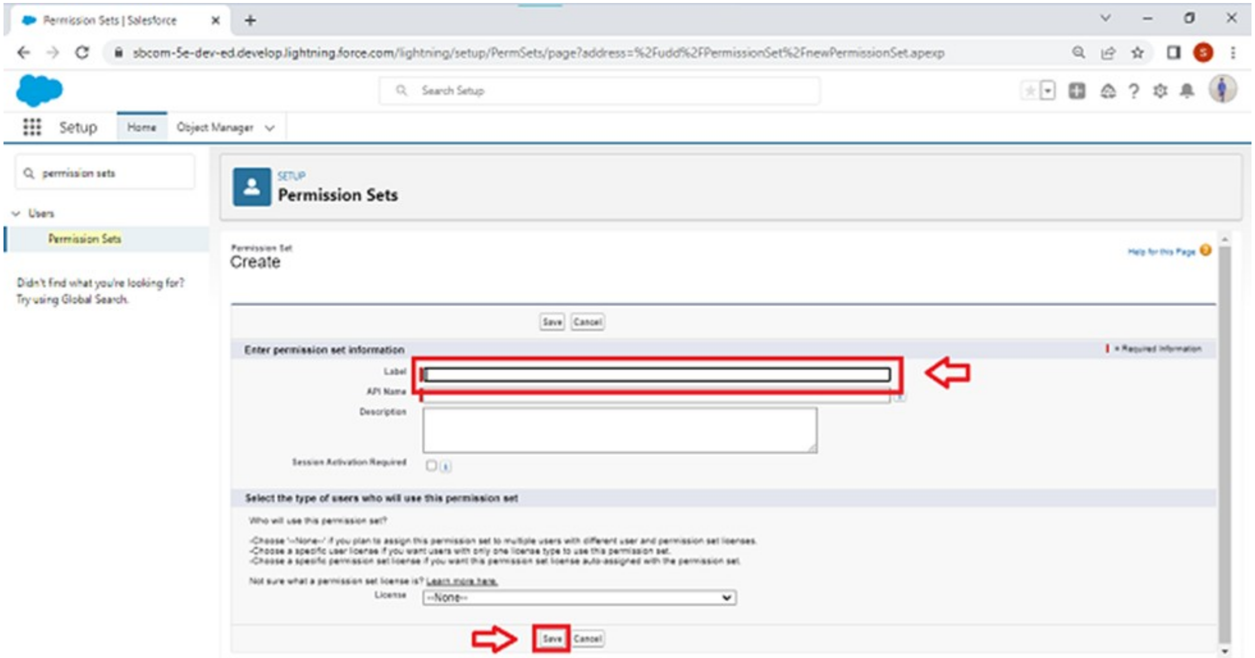
Activity-1

Creating a Permission Set:

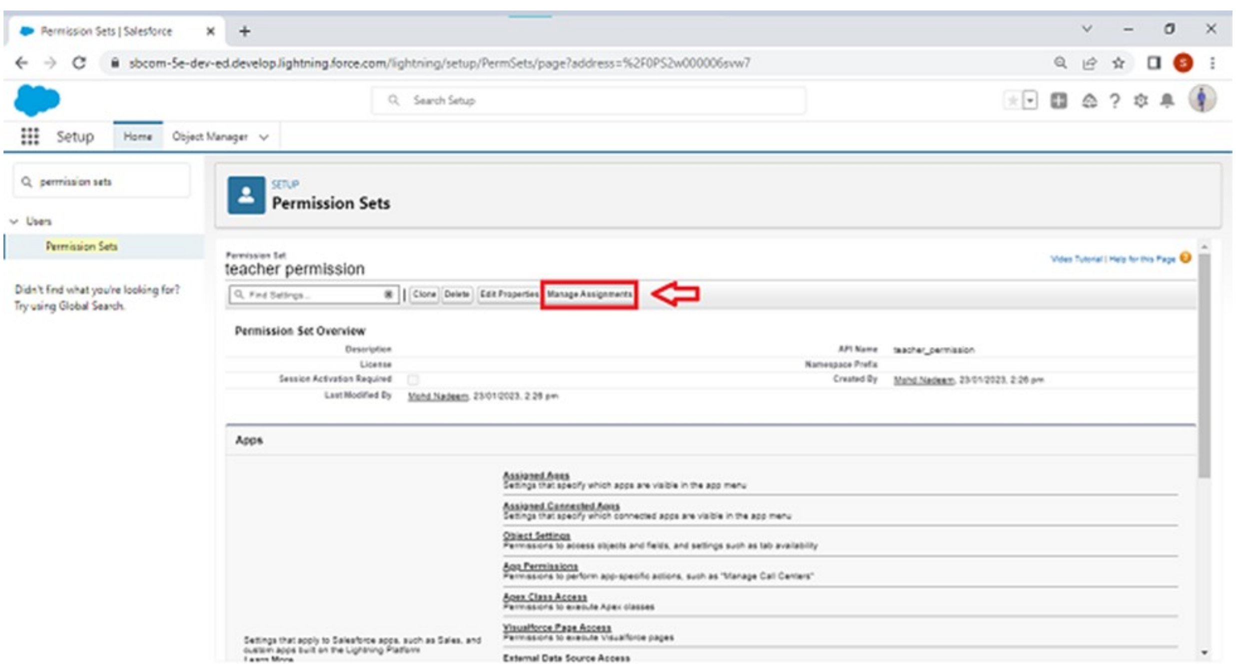
1. From setup search “permission sets” in quick find and select permission set then click on New.



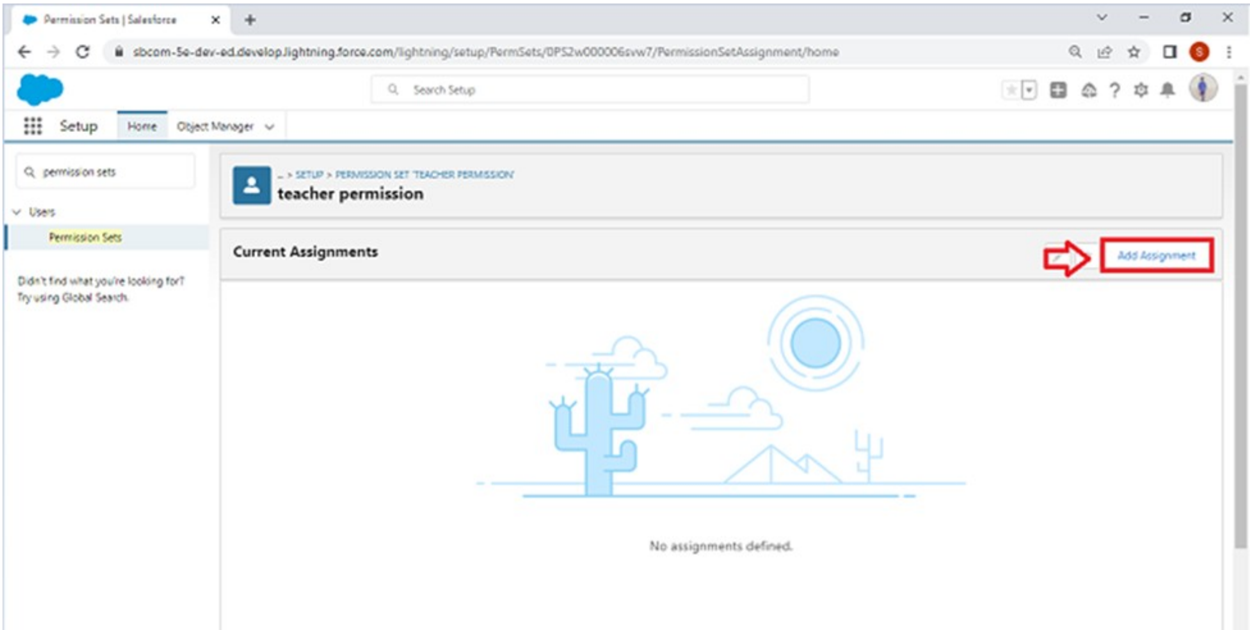
2. Enter label as: Supplier Permits and Save.



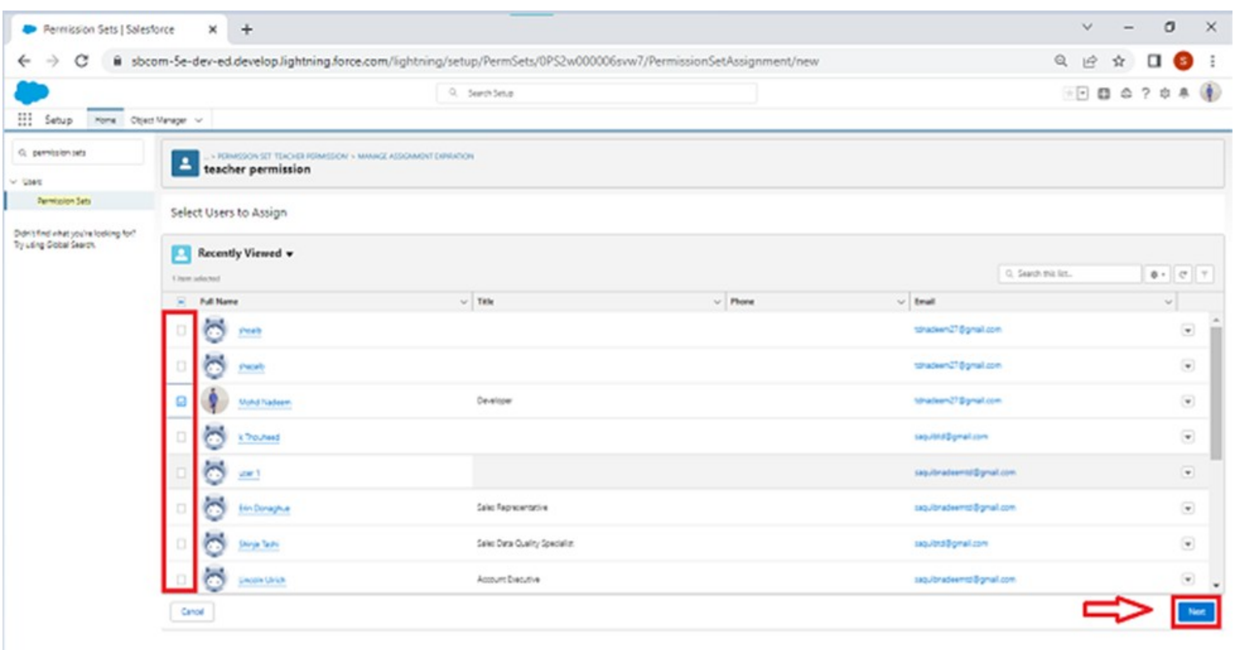
3. After saving the permission click on the Manage assignment



4. Now click on the Add Assignment



5. Now select the users and click on save



Activity-2

Create a Permission set for Review object

Milestone 12: Reports

What are Reports?

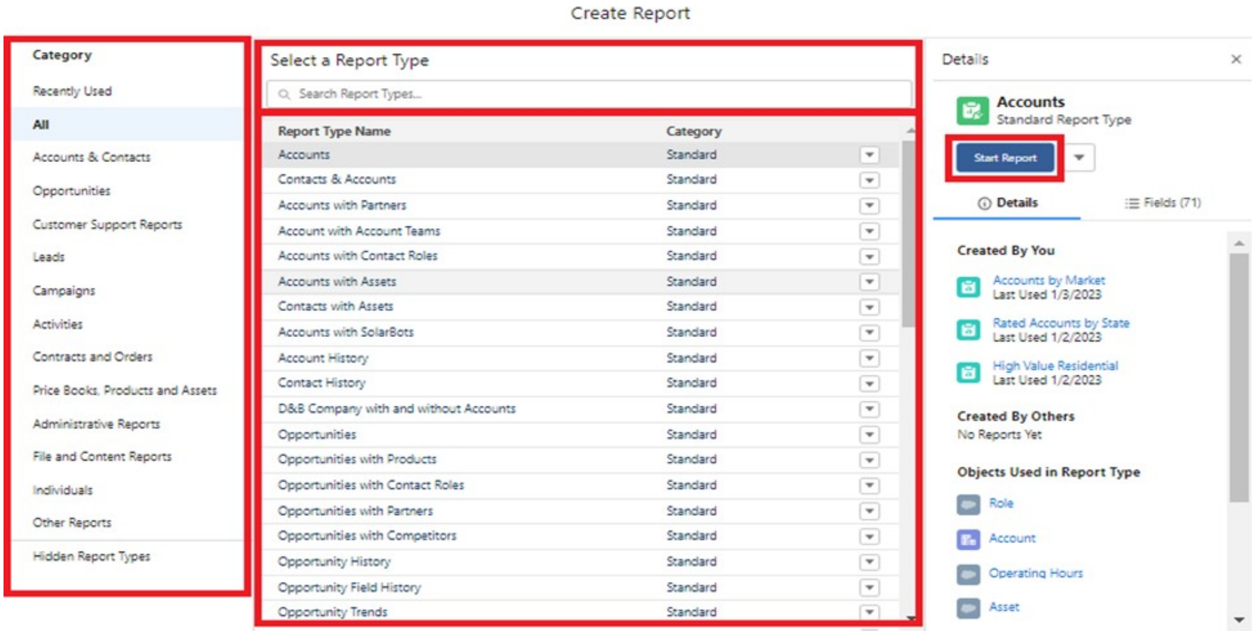
A report is a list of records that meet the criteria you define. It's displayed in rows and columns, and can be filtered, grouped, or displayed in a graphical chart. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

Activity-1

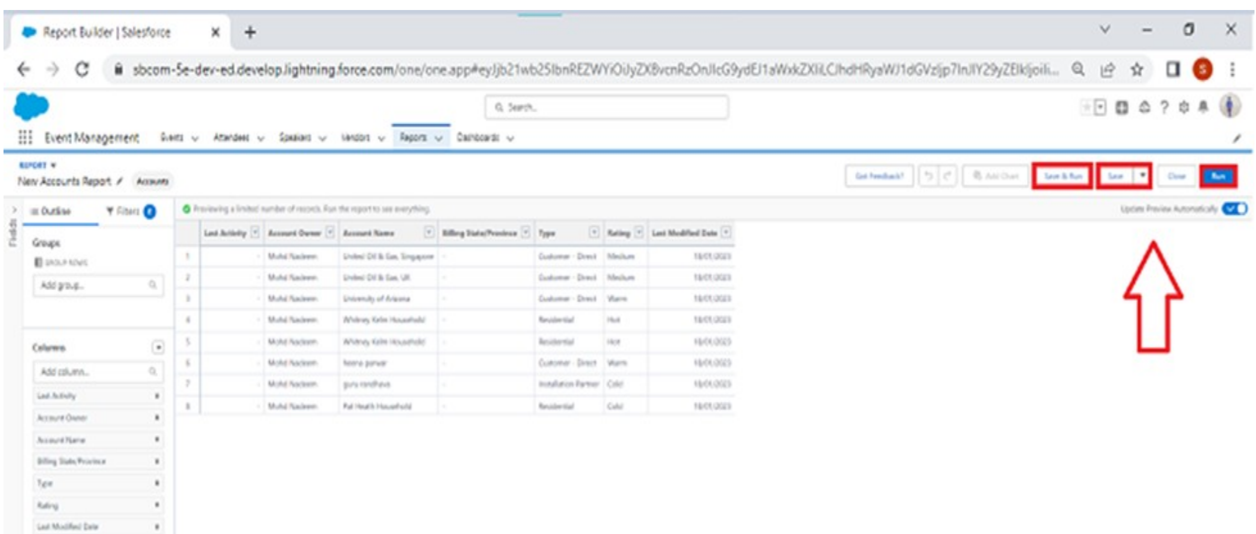
Reports:

1. From the Reports tab, click New Report.

2. Select the report type Attendees with events for the report, and click Create.



3. Customize your report accordingly and include all fields, then save or run it.



Activity-2

Create a report for review and Job Posting Objects.