

VEHICLE MANAGEMENT SYSTEM USING SALESFORCE

Team ID : NM2023TMID35239

Team Size : 4

Team Leader : MAGESHWARIE

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

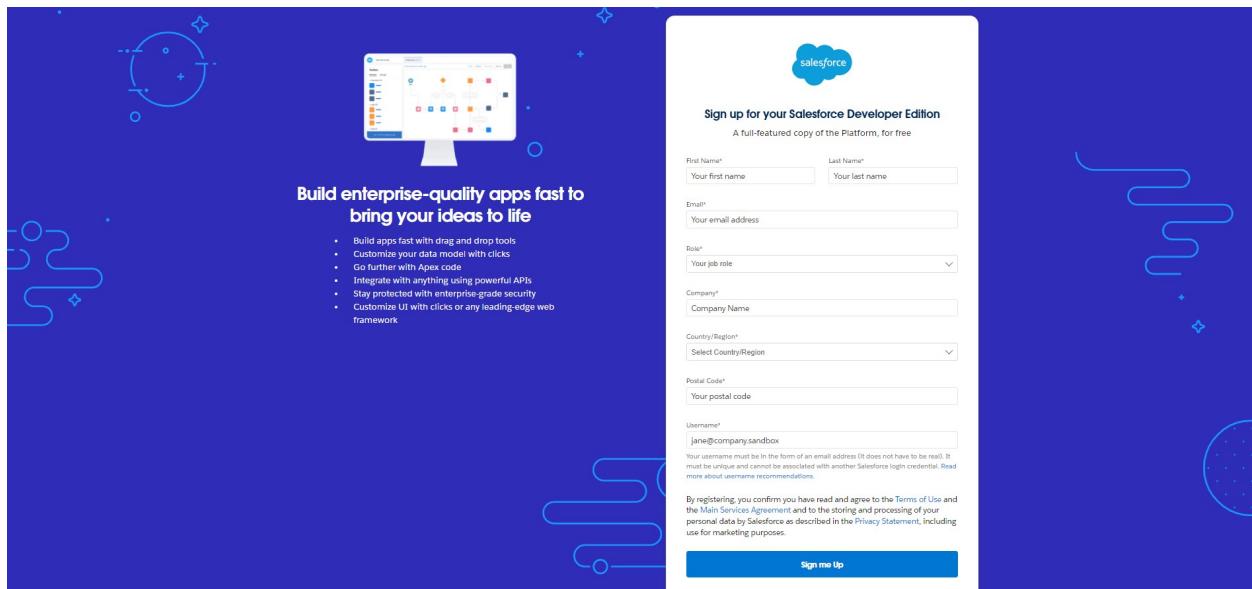
Create your Salesforce Developer Org to get Started

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.

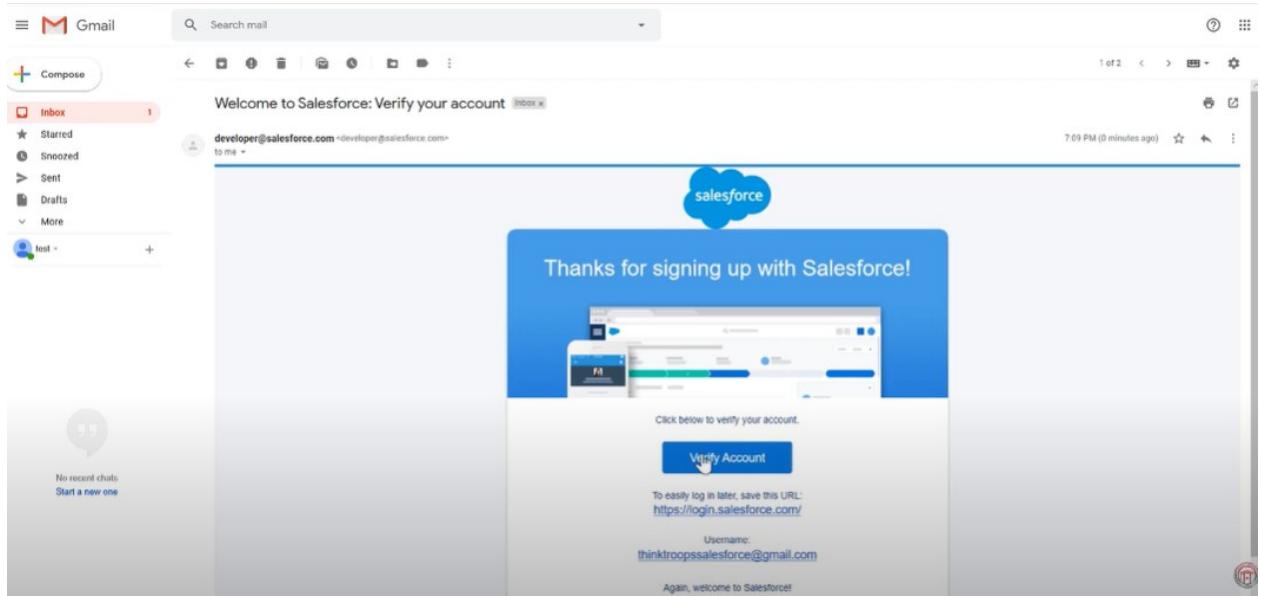
1. Search Developer.salesforce.com



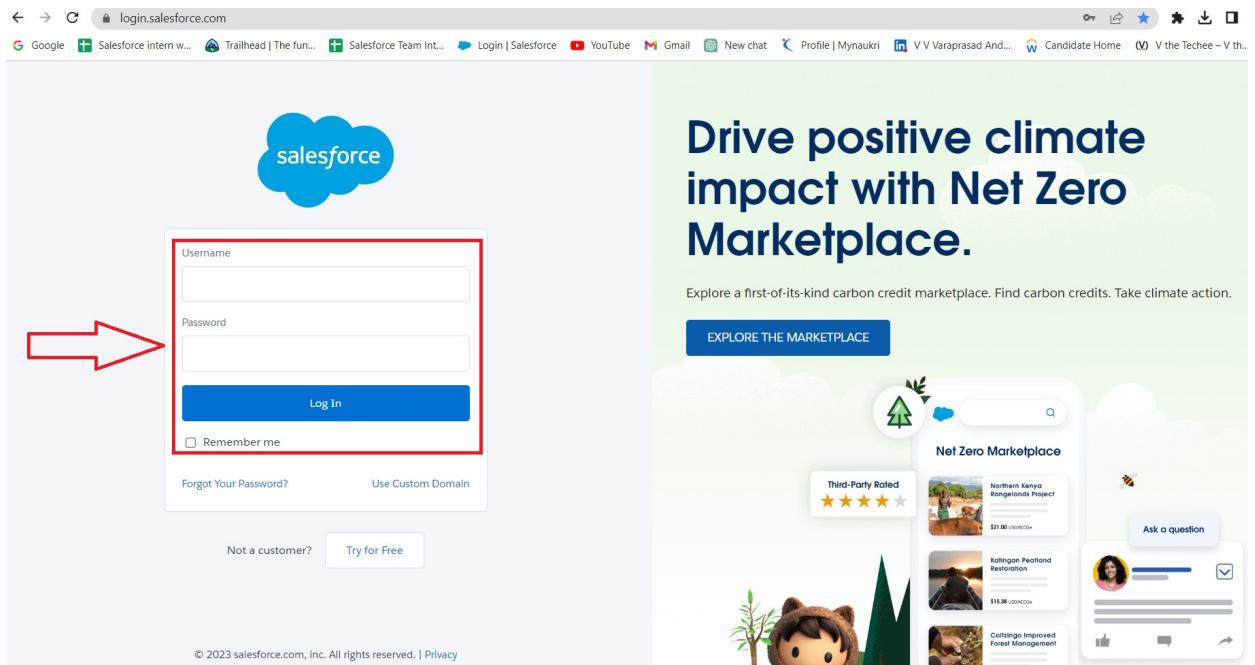
2. Enter the following details like First name, last name, Email, Role, Company, Country/Region, Postal code, and Username must be unique.

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.

The screenshot shows the Salesforce Setup Home page. The left sidebar includes links for Setup Home, Service Setup Assistant, Release Updates, Lightning Experience Transition Assistant, New Salesforce Mobile App QuickStart, Lightning Usage, Optimizer, Administration (Users, Data, Email), and Platform Tools (Subscription Management, Apps, Feature Settings). The main content area features three cards: 'Get Started with Einstein Bots' (Launch an AI-powered bot to automate your digital connections), 'Mobile Publisher' (Use the Mobile Publisher to create your own branded mobile app), and 'Real-time Collaborative Docs' (Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce). Below these cards is a section titled 'Most Recently Used' with a table showing 10 items: Job posting site (Custom Field Definition, Type: Job Posting).

Create a developer org and login with your login credentials.

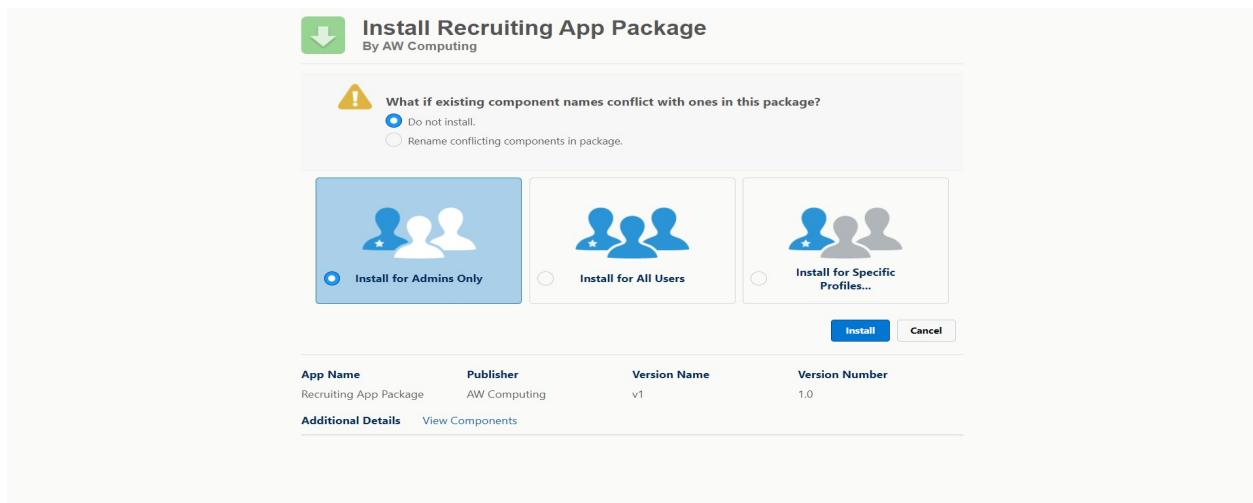
Milestone 2 : Package installation

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:

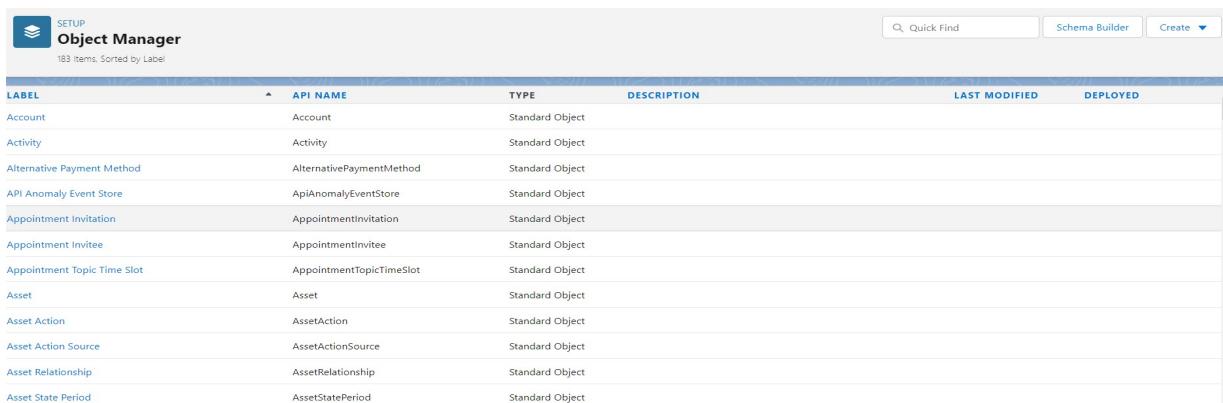
- Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization.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

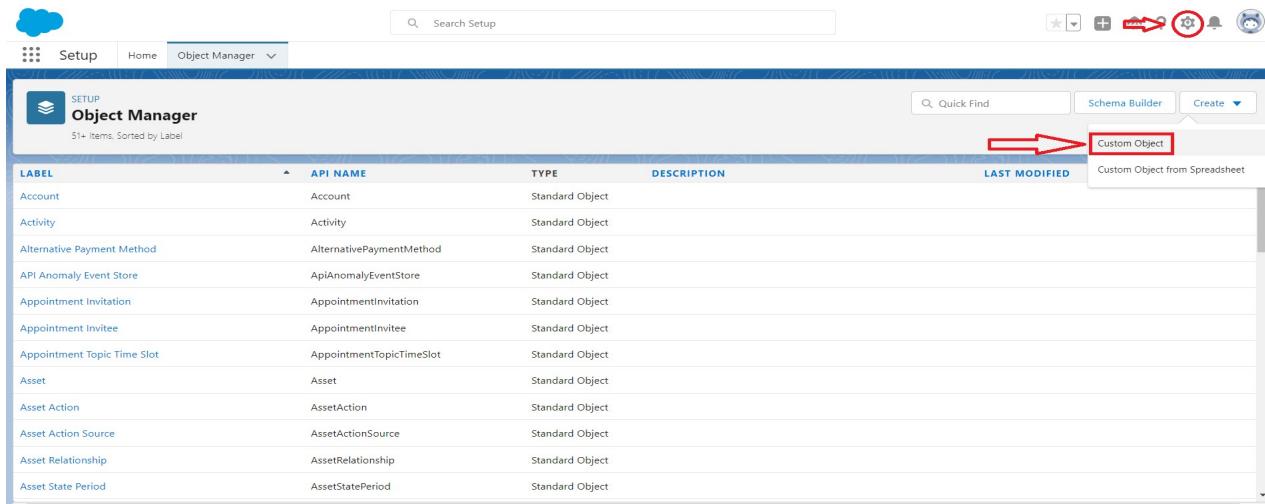
1. From setup click on object manager.



The screenshot shows the Salesforce Object Manager page. At the top, there are tabs for 'SETUP' and 'Object Manager'. Below the tabs, it says '183 items, Sorted by Label'. There is a search bar labeled 'Quick Find' and a 'Schema Builder' button. A 'Create' button with a dropdown arrow is also present. The main area is a table with columns: 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', 'LAST MODIFIED', and 'DEPLOYED'. The table lists various standard objects like Account, Activity, Alternative Payment Method, etc.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Asset	Asset	Standard Object			
Asset Action	AssetAction	Standard Object			
Asset Action Source	AssetActionSource	Standard Object			
Asset Relationship	AssetRelationship	Standard Object			
Asset State Period	AssetStatePeriod	Standard Object			

2. Click create, select custom object.



The screenshot shows the same Salesforce Object Manager page as above, but with a red arrow pointing to the 'Create' button at the top right. Another red arrow points to the 'Custom Object' option in the dropdown menu that appears when the 'Create' button is clicked. The rest of the page remains the same, showing the list of standard objects.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Asset	Asset	Standard Object			
Asset Action	AssetAction	Standard Object			
Asset Action Source	AssetActionSource	Standard Object			
Asset Relationship	AssetRelationship	Standard Object			
Asset State Period	AssetStatePeriod	Standard 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 Add Notes and Attachments related list to default page layout and Launch New Custom Tab Wizard after saving this custom object.

The screenshot shows the 'New Custom Object' setup screen. Key fields visible include:

- Custom Object Information:**
 - Label: Job posting site
 - Plural Label: Job Posting Sites
 - Starts with vowel sound:
- Object Name:** Object Name: Job_posting, Example: Account
- Description:** A large text area for describing the object.
- Context-Sensitive Help Setting:**
 - Open the standard Salesforce.com Help & Training window
 - Open a window using a Visualforce page
- Content Name:** Content Name:
- Enter Record Name Label and Format:**
 - Record Name: Site Name, Example: Account Name
 - Data Type:

The screenshot shows the continuation of the 'New Custom Object' setup screen, specifically the 'Optional Features' and 'Object Creation Options' sections.

- Optional Features:**
 - Allow Reports
 - Allow Activities
 - Track Field History
 - Allow in Chatter Groups
 - Enable Licensing
- Object Classification:**
 - Allow Sharing
 - Allow Bulk API Access
 - Allow Streaming API Access
- Deployment Status:**
 - In Development
 - Deployed
- Search Status:**
 - Allow Search
- Object Creation Options (Available only when custom object is first created):**
 - 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.

Milestone 4 : Tabs

What is Tab?

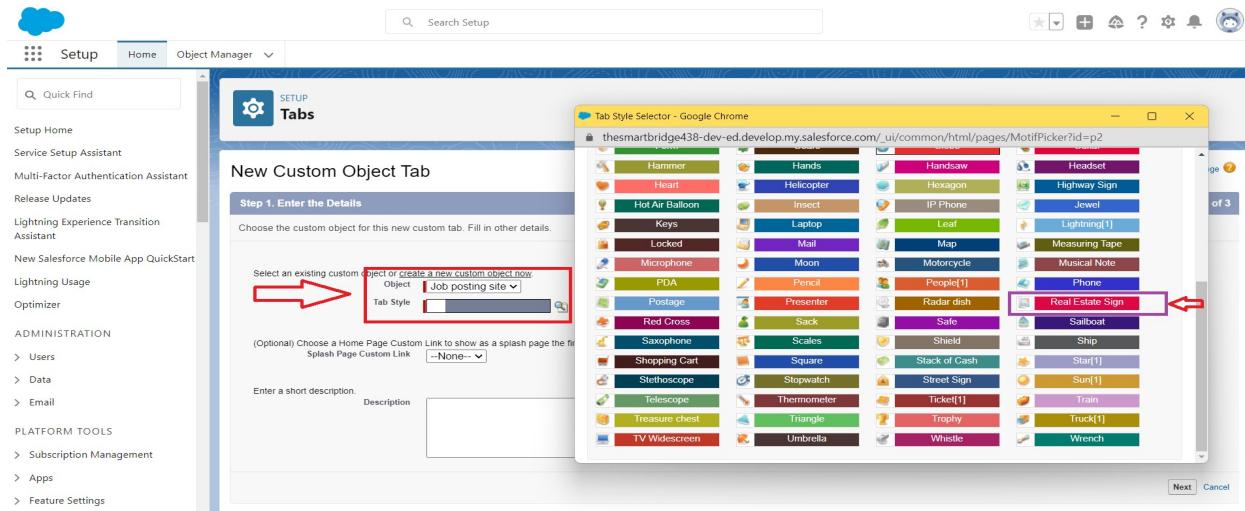
In Salesforce, a tab is a user interface element that allows users to navigate to different sections of the platform, such as Accounts, Contacts, Leads, and Opportunities. Tabs can also be used to access custom objects and custom pages. They are typically located at the top of the screen and can be customized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

Milestone 5 : Fields

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.

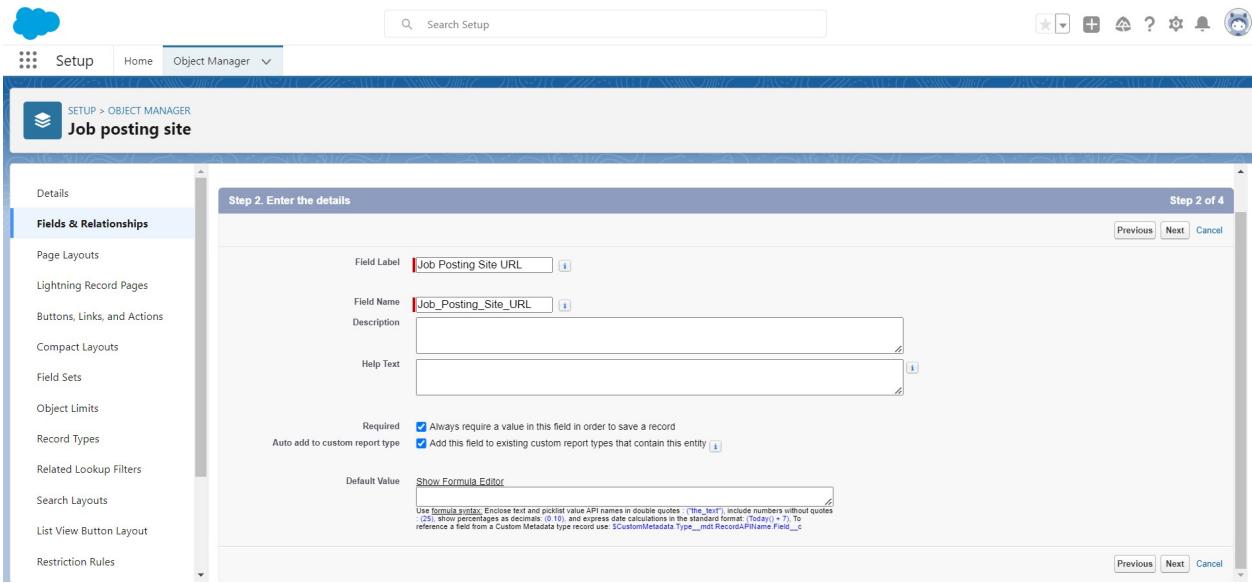
The screenshot shows the Salesforce Object Manager for the 'Job posting site' object. On the left, there's a sidebar with various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main area is titled 'Fields & Relationships' and lists four items: 'Created By', 'Last Modified By', 'Owner', and 'Site Name'. A red box highlights the 'New' button at the top right of the list table, and a red arrow points to it from the left. Another red box highlights the 'Fields & Relationships' tab in the sidebar, and a red arrow points to it from the top left.

2. Select the data type as URL.

This screenshot shows the 'Fields & Relationships' configuration screen for the 'Job posting site'. The sidebar on the left is identical to the previous screenshot. The main area shows a list of field types: Date, Date/Time, Email, Geolocation, Number, Percent, Phone, Picklist, Picklist (Multi-Select), Text, Text Area, Text Area (Long), Text Area (Rich), Text (Encrypted), and Time. A red box highlights the 'URL' option in the list, and a red arrow points to it from the bottom right. To the right of the list, there's a detailed description of what each field type allows users to enter.

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

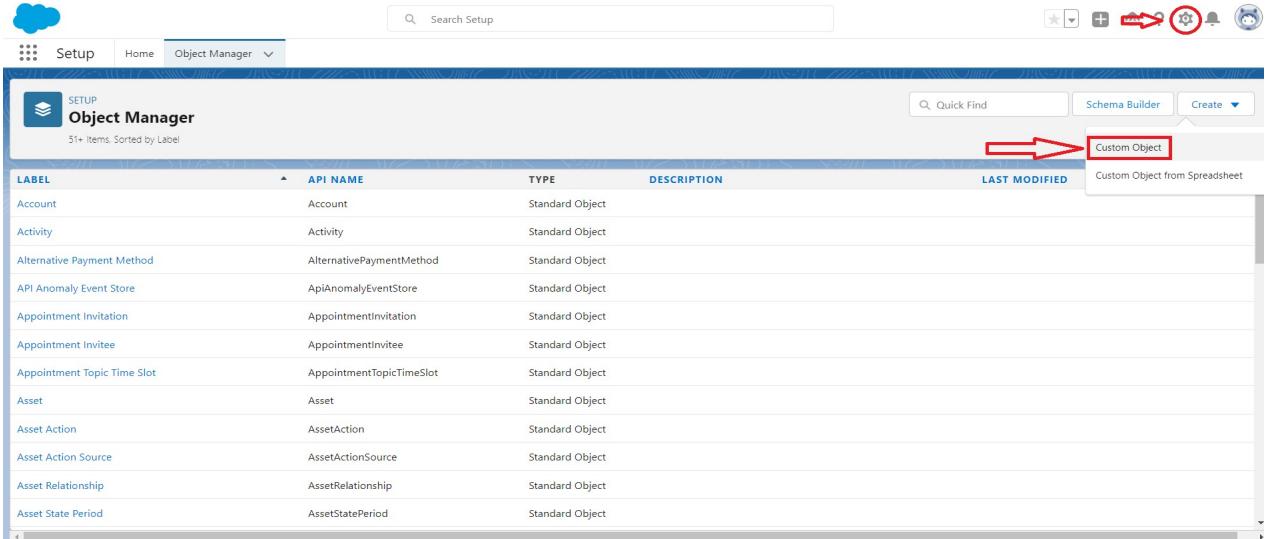
What is a Junction Object?

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

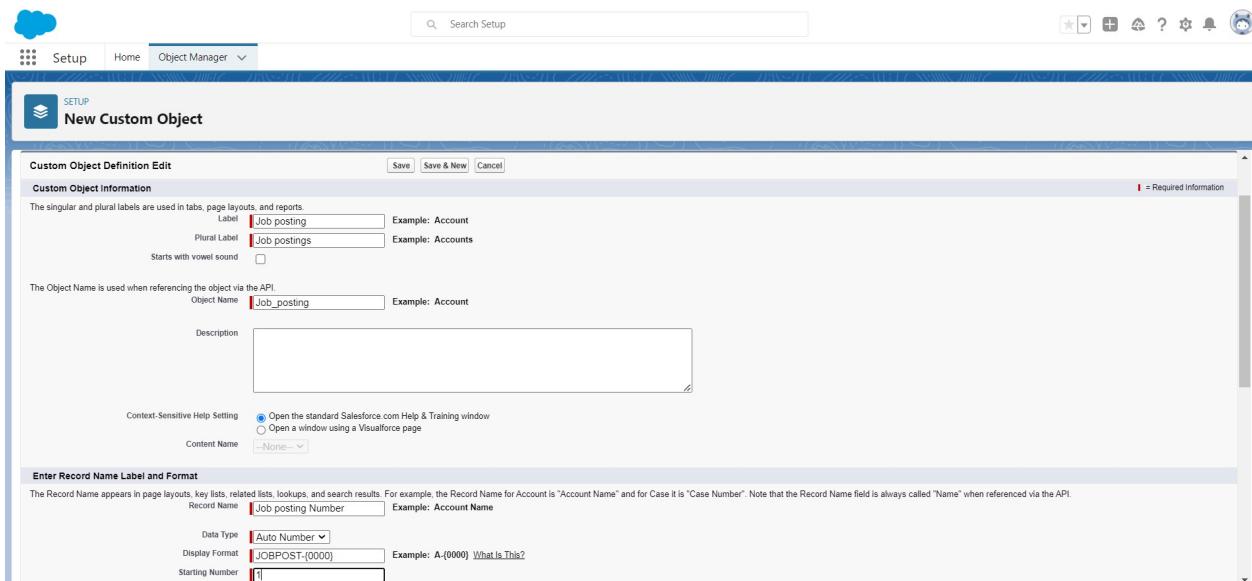
Creating a custom junction object :

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

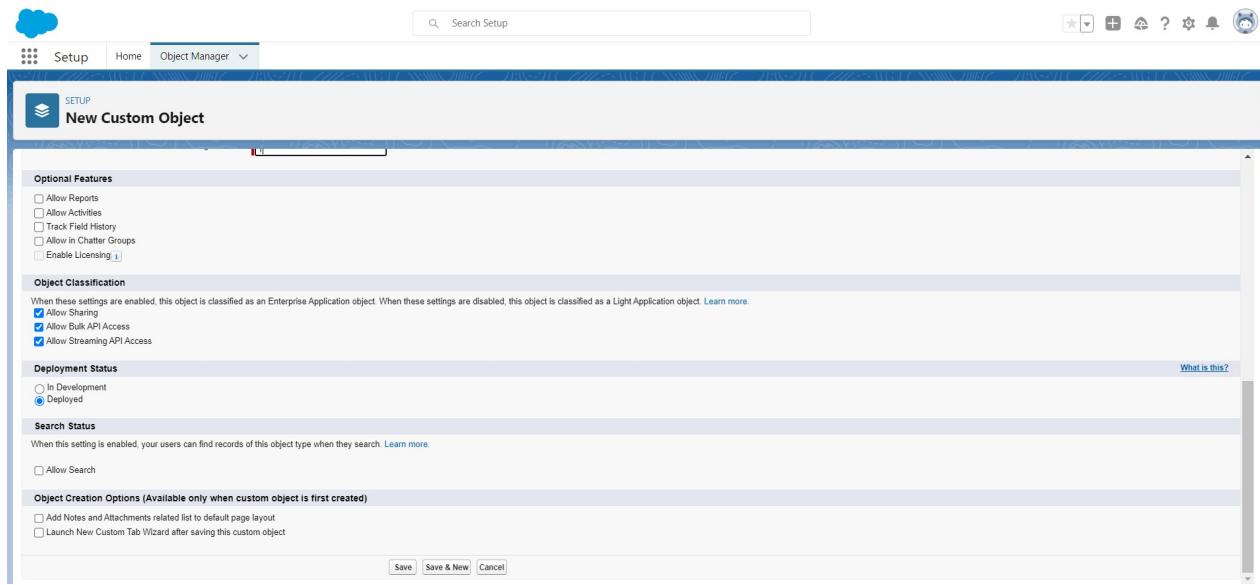


The screenshot shows the Salesforce Object Manager interface. At the top, there's a search bar and a toolbar with various icons. Below the toolbar, the title 'Object Manager' is displayed, followed by a sub-header '51+ items. Sorted by Label'. A red arrow points to the 'Create' button, which has a sub-menu option 'Custom Object' highlighted with a red box. The main area is a table listing objects with columns for 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', and 'LAST MODIFIED'. The table includes standard objects like Account, Activity, and Asset, as well as several custom objects.

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.



The screenshot shows the 'New Custom Object' page in the Salesforce setup. The title is 'New Custom Object'. The form is titled 'Custom Object Definition Edit' with buttons for 'Save', 'Save & New', and 'Cancel'. It includes sections for 'Custom Object Information' (Label: Job posting, Plural Label: Job postings, Starts with vowel sound: unchecked), 'Object Name' (Object Name: Job_posting, Example: Account), 'Description' (a large text input field), 'Context-Sensitive Help Setting' (radio buttons for standard help or Visualforce page), 'Content Name' (None selected), and 'Enter Record Name Label and Format' (Record Name: Job posting Number, Data Type: Auto Number, Display Format: JOBPOST-{0000}, Starting Number: 1). A note at the bottom explains that the Record Name appears in various contexts like page layouts and key lists.



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.

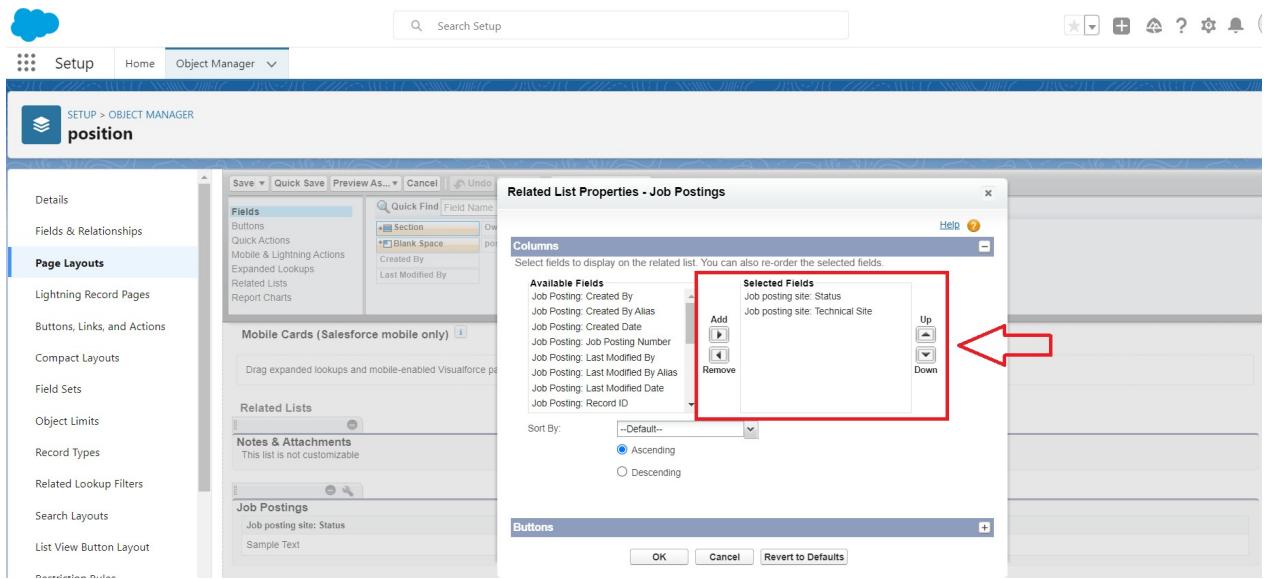
Activity-1

Modifying the page layouts :

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

The screenshot shows the Salesforce Object Manager interface for the 'position' object. The left sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts (which is selected and highlighted with a red box), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main content area displays the 'Page Layouts' section, which contains one item: 'position Layout'. The table has columns for PAGE LAYOUT NAME, CREATED BY, and MODIFIED BY. The 'position Layout' row is also highlighted with a red box, and a red arrow points to the 'Modified By' column, which shows 'Veera Venkata Varaprasad Androthu, 1/24/2023, 1:05 AM'.

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

Milestone 8 : Validation Rules

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.

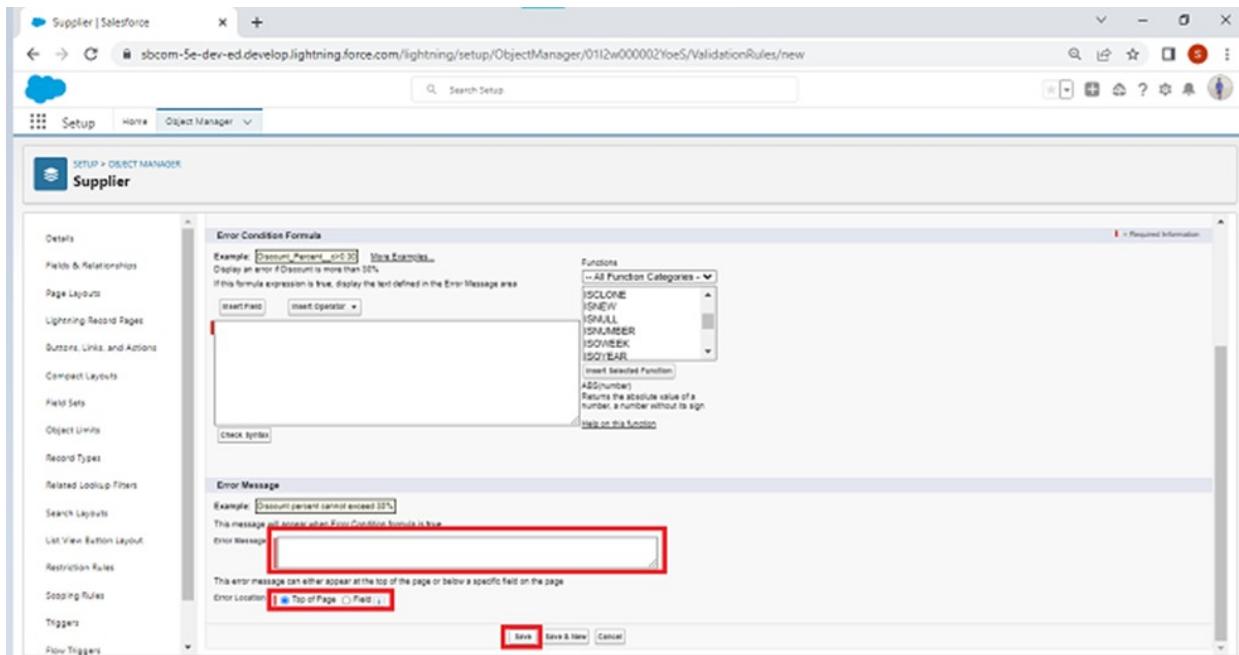
The screenshot shows the Salesforce Object Manager interface for the 'Supplier' object. The validation rules table is empty, with a note 'No items to display.'

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.

The screenshot shows the 'Supplier Validation Rule' creation page. The 'Validation Rule Edit' form has the rule name 'Phone number validation rule' and the active checkbox checked. The error condition formula is set to 'InsertField > Insert Operator > Check Syntax'. A tooltip for 'Check Syntax' is displayed, stating: 'Example: Absciss>0 AND Absciss<100. If this formula expression is true, display the text defined in the Error Message area.'

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.

The screenshot shows the Salesforce Setup interface with the search bar containing "profiles". The "Profiles" link in the sidebar is highlighted with a red box. The main area displays a list of profiles:

Action	Profile Name	User License	Custom
Clone	Standard	Salesforce	✓
Clone	Silver Partner User	Silver Partner	✗
Clone	Solution Manager	Salesforce	✗
Clone	Standard Platform User	Salesforce Platform	✗
Clone	Standard User	Salesforce	✗
Clone	System Administrator	Salesforce	✗

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

The screenshot shows the "Clone Profile" dialog. It prompts the user to "Enter the name of the new profile" and "You must select an existing profile to clone from." The "Existing Profile" section is selected, showing "Standard User" and "User License: Salesforce". The "Profile Name" field is highlighted with a red box and has an arrow pointing to it. The "Save" button at the bottom right is also highlighted with a red box and has an arrow pointing to it.

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

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. A specific profile, 'test stdnd user', is being edited. The 'Edit' button is highlighted with a red box. The page displays various profile details and settings, including standard object layouts and custom object permissions.

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

The screenshot shows the Salesforce Setup interface under the Profiles tab. The 'Custom Object Permissions' section is highlighted with a red box. This section contains two grids of checkboxes for various objects. The first grid covers Activities, Attendees, Blanks, Categories, Customers, Demos, Events, Invites, Orders, Order_Details, Payments, Products, Reservations, and Roles. The second grid covers Rooms, SolarBots, SolarBot_Status, Speakers, Staffs, Students, Student_Activities, Suppliers, Teachers, Vendors, Volunteer_Activities, Volunteer_Jobs, Volunteer_Shifts, and Volunteer_Shift_Workers. Each grid has columns for Read, Create, Edit, Delete, View All, and Modify All.

	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"/>
Blanks	<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"/>
Invites	<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"/>
Rooms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SolarBots	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SolarBot_Status	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Speakers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staffs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Student_Activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Suppliers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Teachers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Vendors	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Volunteer_Activities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Volunteer_Jobs	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Volunteer_Shifts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Volunteer_Shift_Workers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Activity-2

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

Milestone 10: User

What is a user?

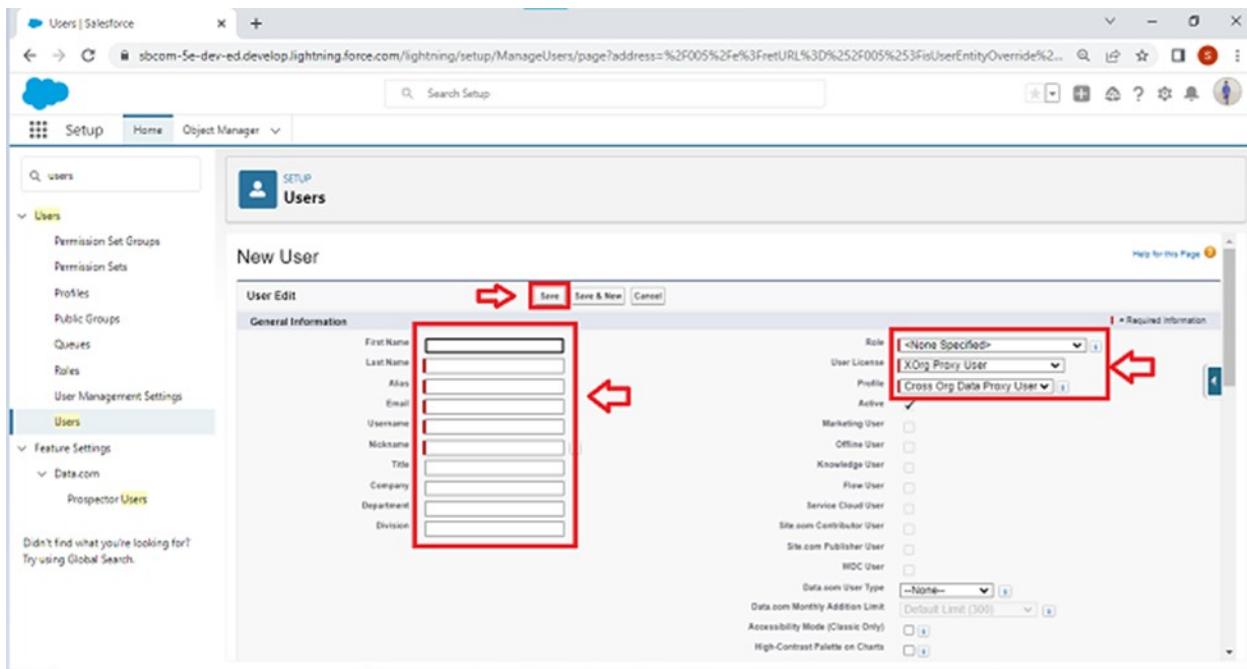
A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what 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

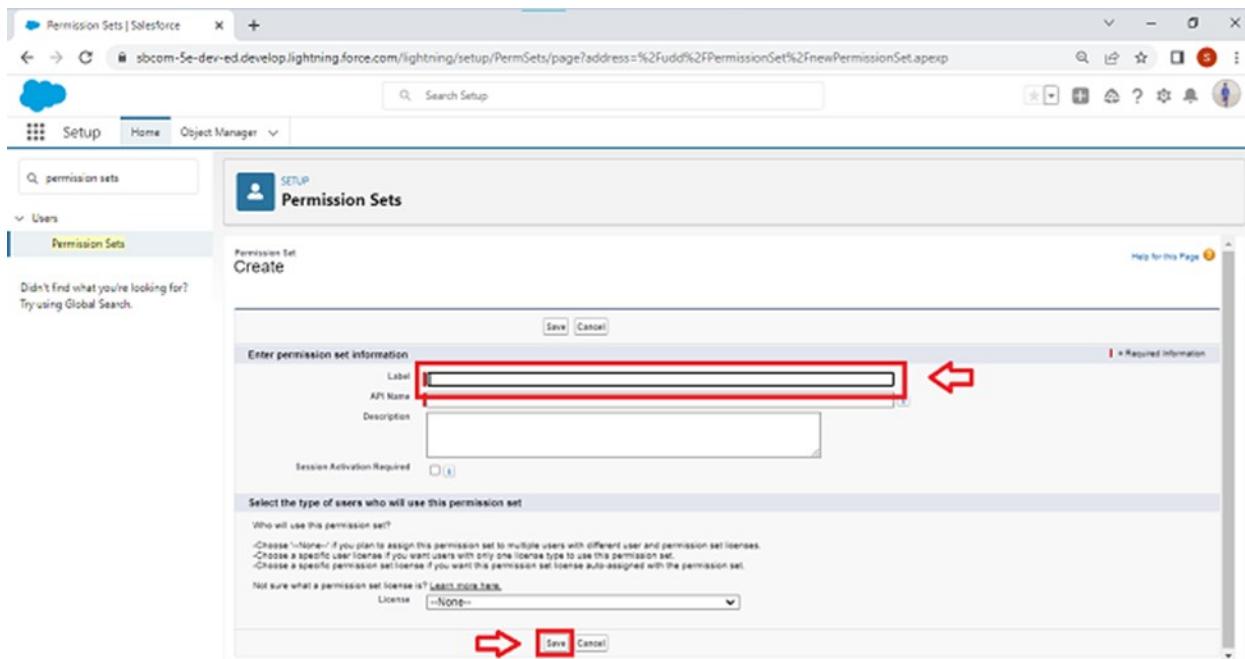
Creating a Permission Set:

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

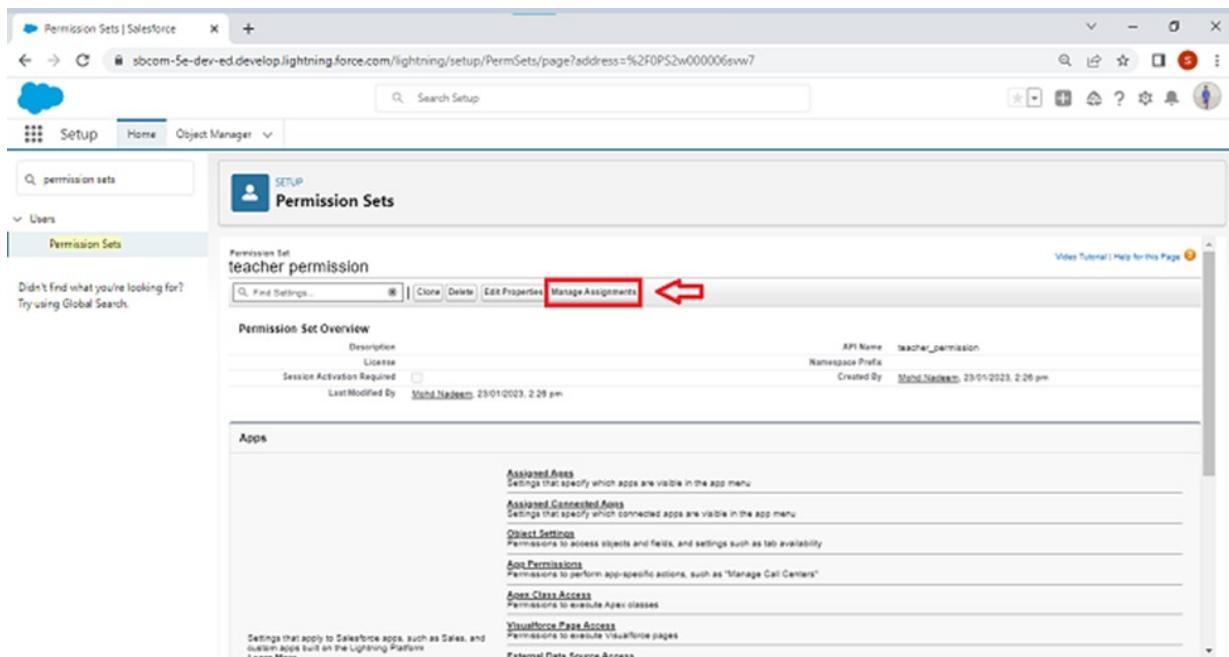
The screenshot shows the Salesforce 'Permission Sets' page. At the top left, there are two search bars: one for 'permission sets' and another for 'Users'. Below these is a 'Permission Sets' section with a red box and arrow highlighting it. A second red box and arrow highlights the 'Permission Sets' link in the sidebar. In the center, there's a message about creating, viewing, and managing permission sets. Below the message is a table with a 'New' button highlighted by a red box and arrow. The table lists various permission sets with columns for Action, Permission Set Label, Description, and License.

Action	Permission Set Label	Description	License
<input type="checkbox"/>	B2B Buyer	Allows access to the store. Lets users see products and categories. ...	B2B Buyer Permission Set One Seat
<input type="checkbox"/>	Buyer	Includes all buyer capabilities, and allows access to manage carts a...	B2B Buyer Manager Permission Set One Seat
<input type="checkbox"/>	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<input type="checkbox"/>	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<input type="checkbox"/>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Con...	Service Cloud Voice User
<input type="checkbox"/>	Contact Center Agent	Access agent features in Service Cloud Voice contact centers that u...	Service Cloud Voice User
<input type="checkbox"/>	Experience Profile Manager	Lets users create, read, edit, and delete locations, sublocations, que...	Salesforce
<input type="checkbox"/>	Facility Manager	Give your mobile workforce access to the Field Service mobile app.	Field Service Mobile
<input type="checkbox"/>	FieldServiceMobileStandardPermSet	Allow access to commerce merchandising features.	Commerce Merchandiser User Permission Set License Seat
<input type="checkbox"/>	Merchandiser	Read Access to all entities enabled by Order Management.	Lightning Order Management User
<input type="checkbox"/>	Order Management Board		

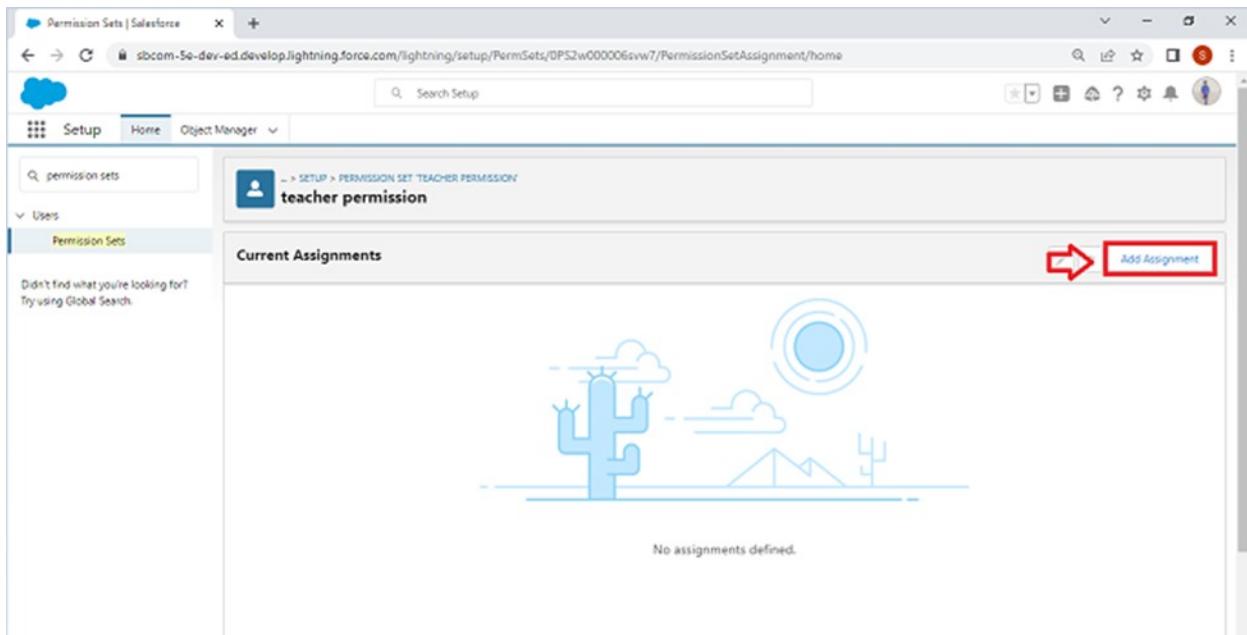
2. Enter label as: Supplier Permits and Save.



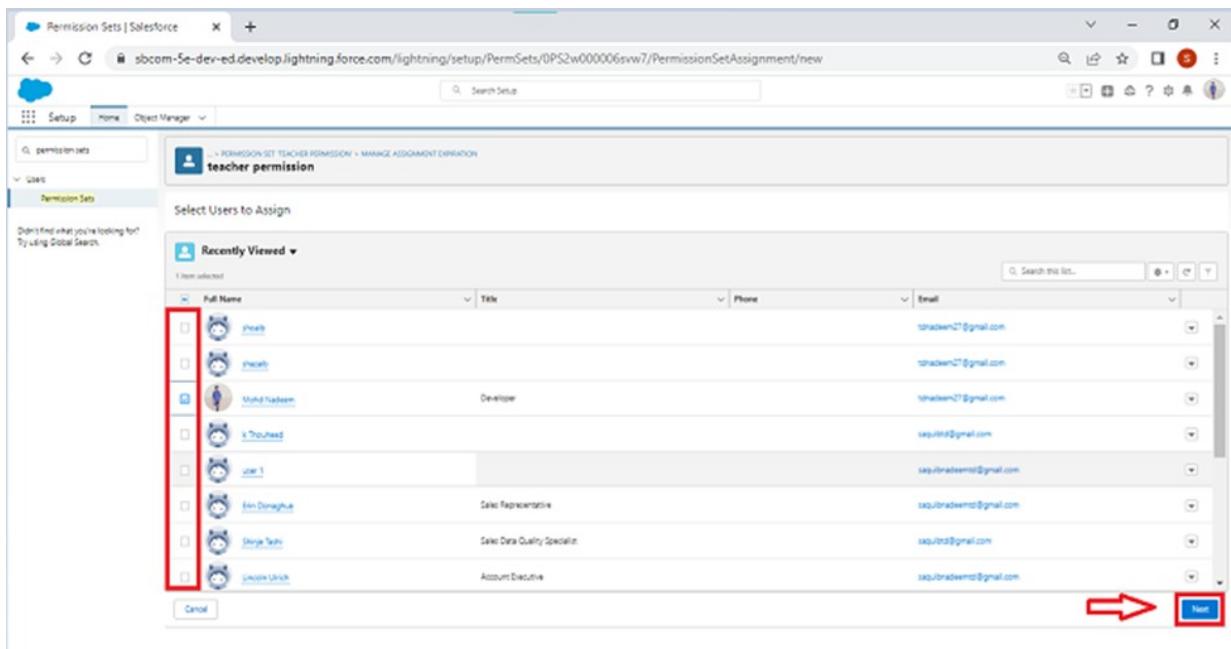
3. After saving the permission click on the Manage assignment



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.

Smart Internz

[View Report](#)

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

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

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

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

Report Builder | Salesforce

New Accounts Report / Accounts

REPORT

Get Feedback! Add Chart Save & Run Save Close Run

Updates Preview Automatically

Last Activity	Account Owner	Account Name	Billing State/Province	Type	Rating	Last Modified Date
1	Multil National	United Oil & Gas, Singapore	-	Customer - Direct	Medium	18/01/2023
2	Multil National	United Oil & Gas, UK	-	Customer - Direct	Medium	18/01/2023
3	Multil National	University of Arizona	-	Customer - Direct	Warm	18/01/2023
4	Multil National	Whitney Kyle Household	-	Residential	Hot	18/01/2023
5	Multil National	Whitney Kyle Household	-	Residential	Hot	18/01/2023
6	Multil National	Nicola partner	-	Customer - Direct	Warm	18/01/2023
7	Multil National	guru northeast	-	Installation Partner - Color	Medium	18/01/2023
8	Multil National	Pat Health Household	-	Residential	Cold	18/01/2023

Activity-2

Create a report for review and Job Posting Objects.