NAAN MUDHALVAN

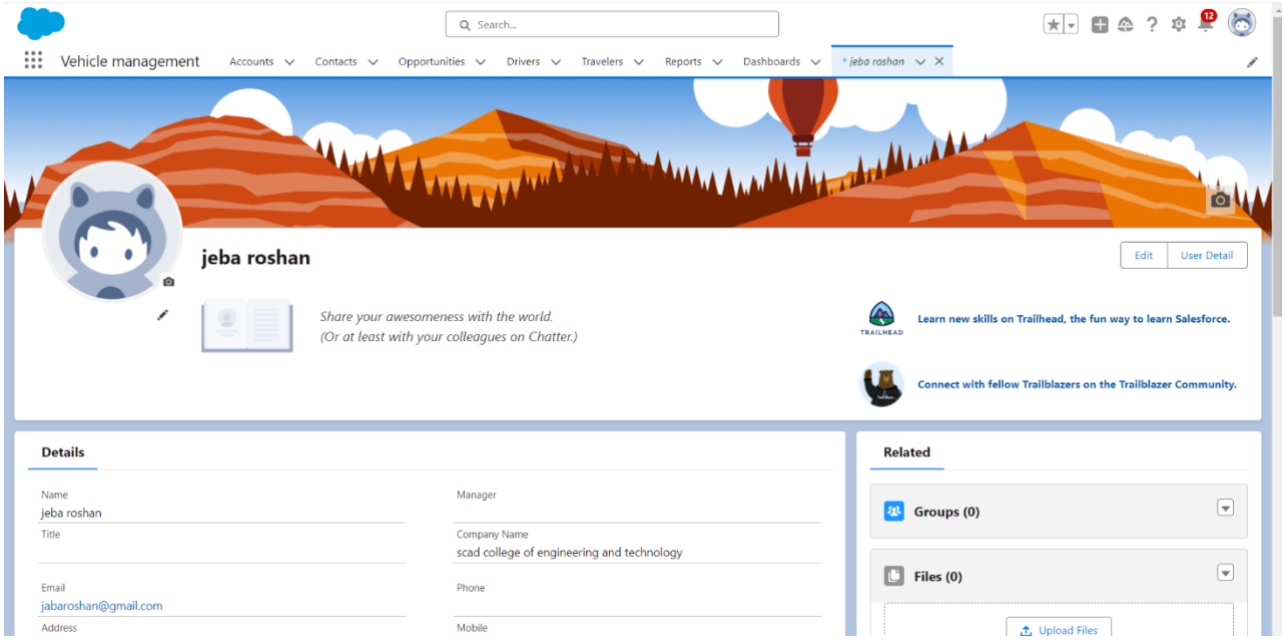
SALESFORCE PROJECT REPORT

COLLEGE: SCAD COLLEGE OF ENGINEERING & TECHNOLOGY

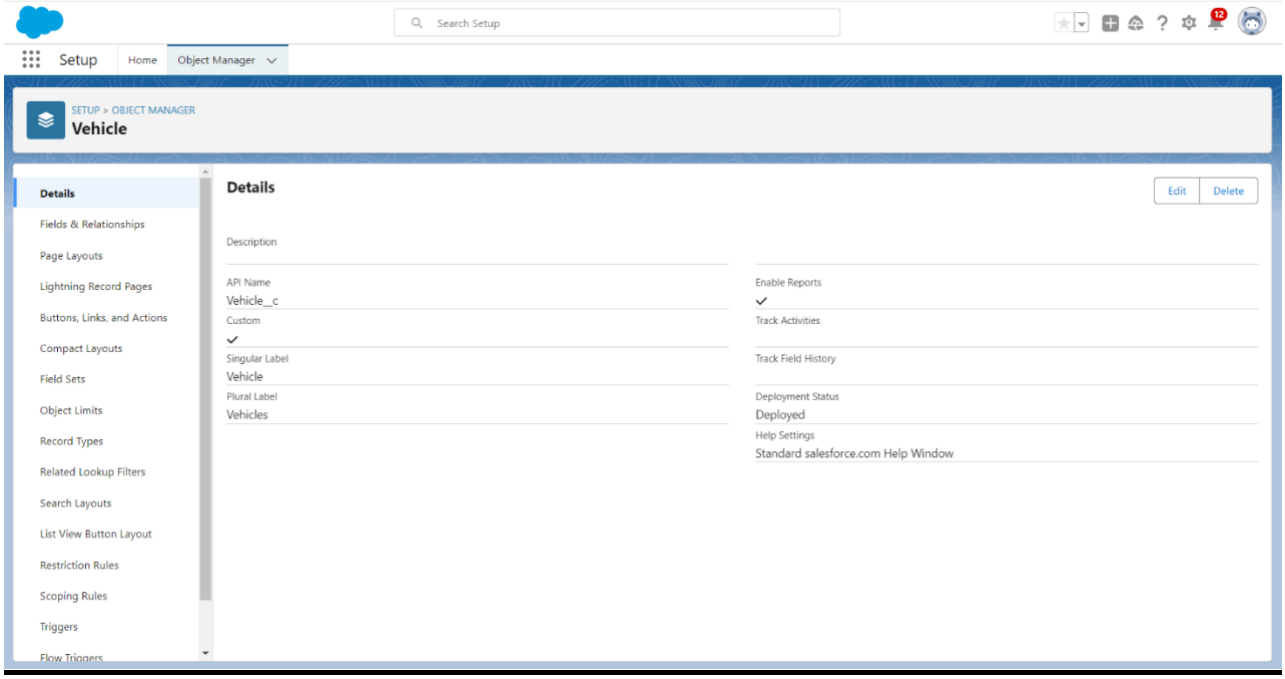
BATCH – 1

NAME	NM ID	REG NO
ASWIN SHANU S	A1D68D74526C16AB68048E4747FD1122	952820114311
JEBA ROSHAN	ABA0C14EC4E8E7E9479478D2B5E98373	952820114319
JEFRIN K	3CB6EFIDEDAA4E2AE6D47E7EEFD46718	952820114320
JOSEPH M	4352EC7018045C8BD964713F14087ED6	952820114322

Step 1: Create a Salesforce Account



Step 2 : Create the Objects(DRIVER,TRAVELER



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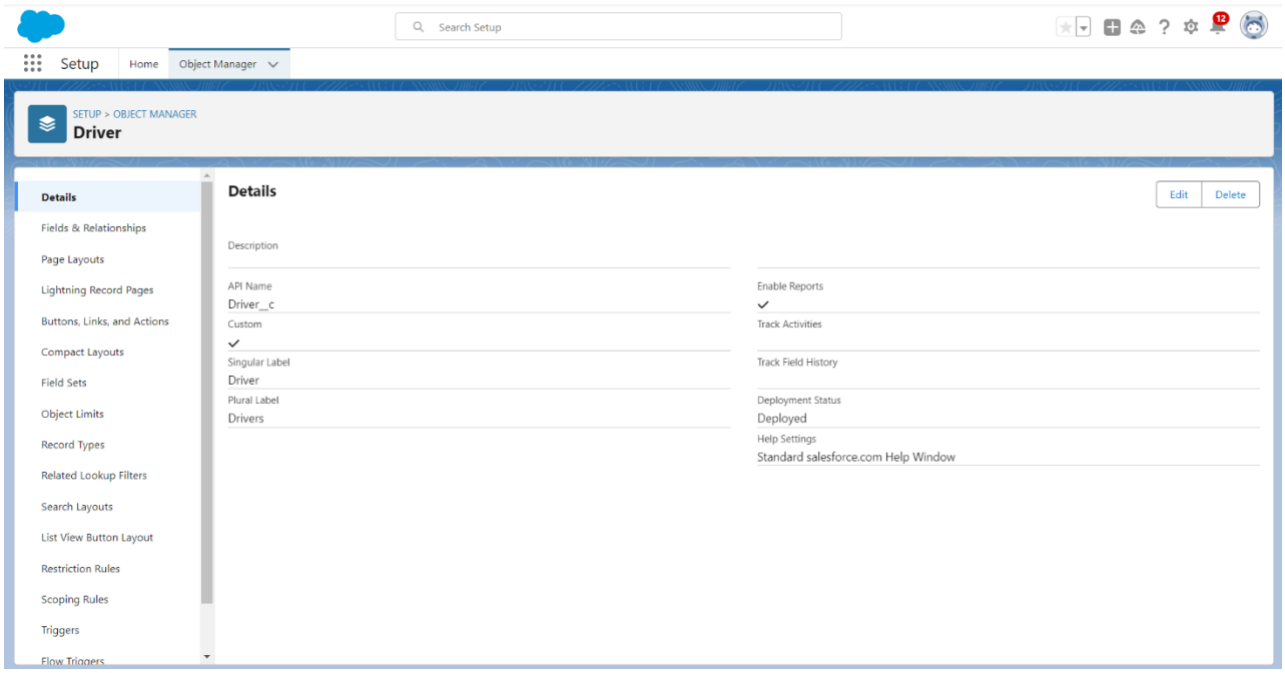
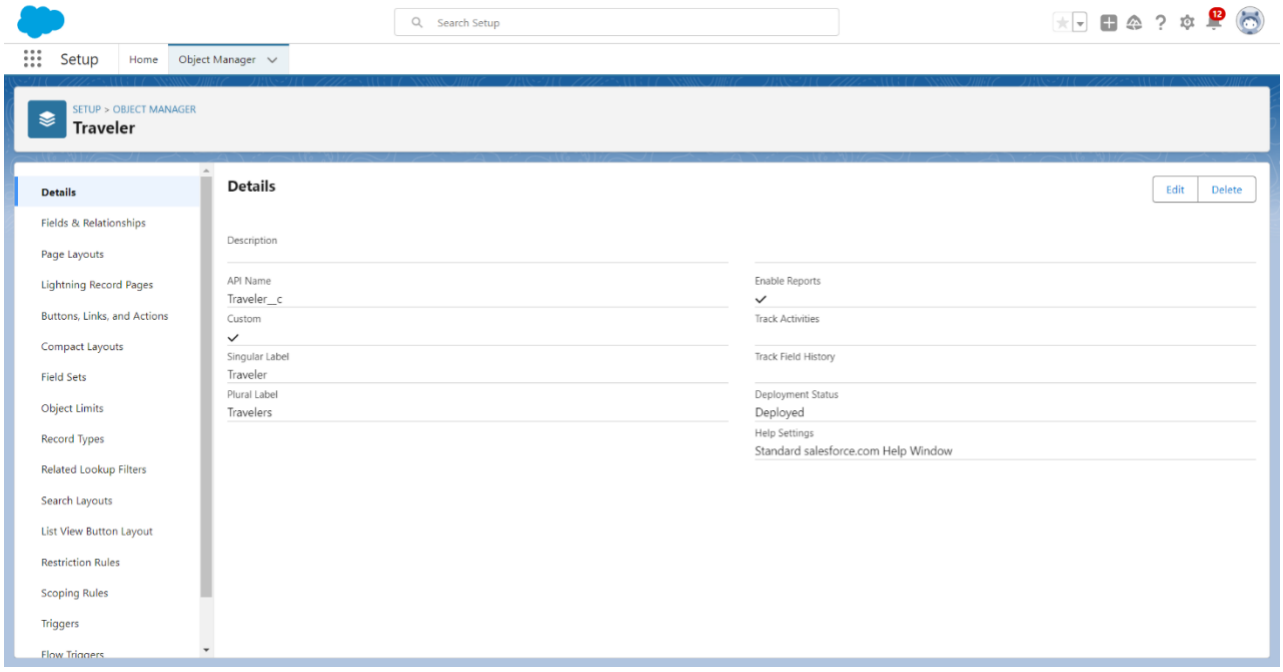
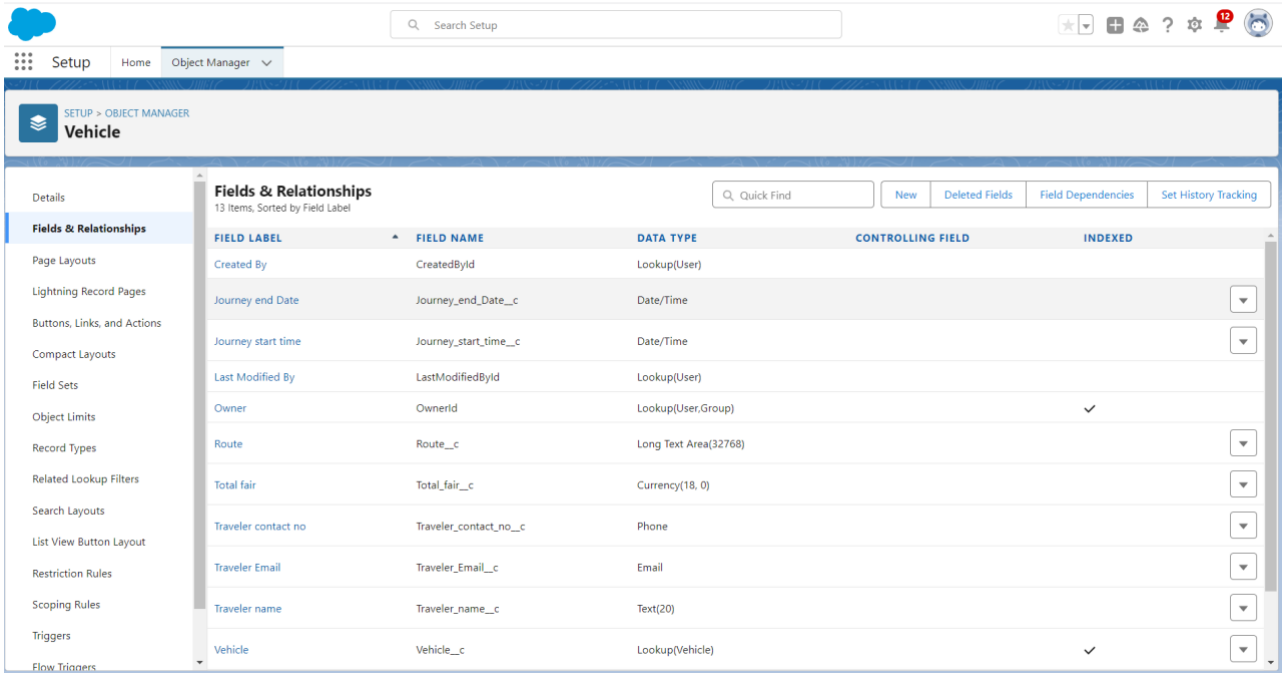
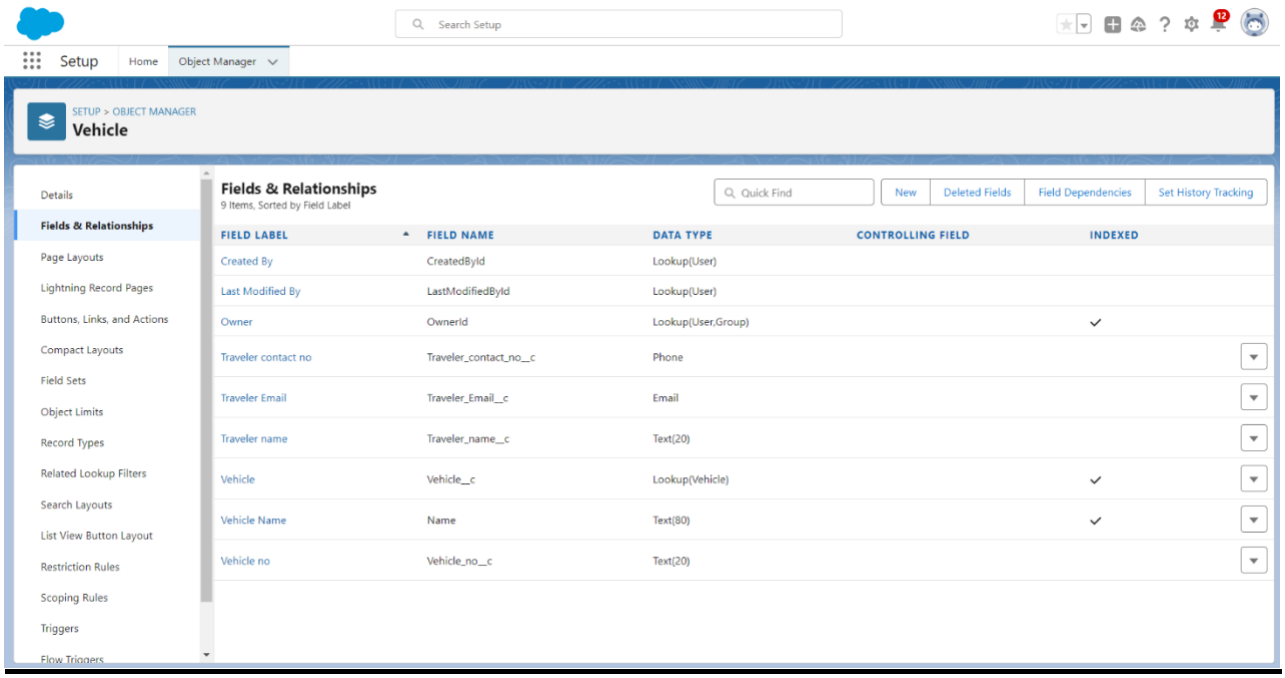
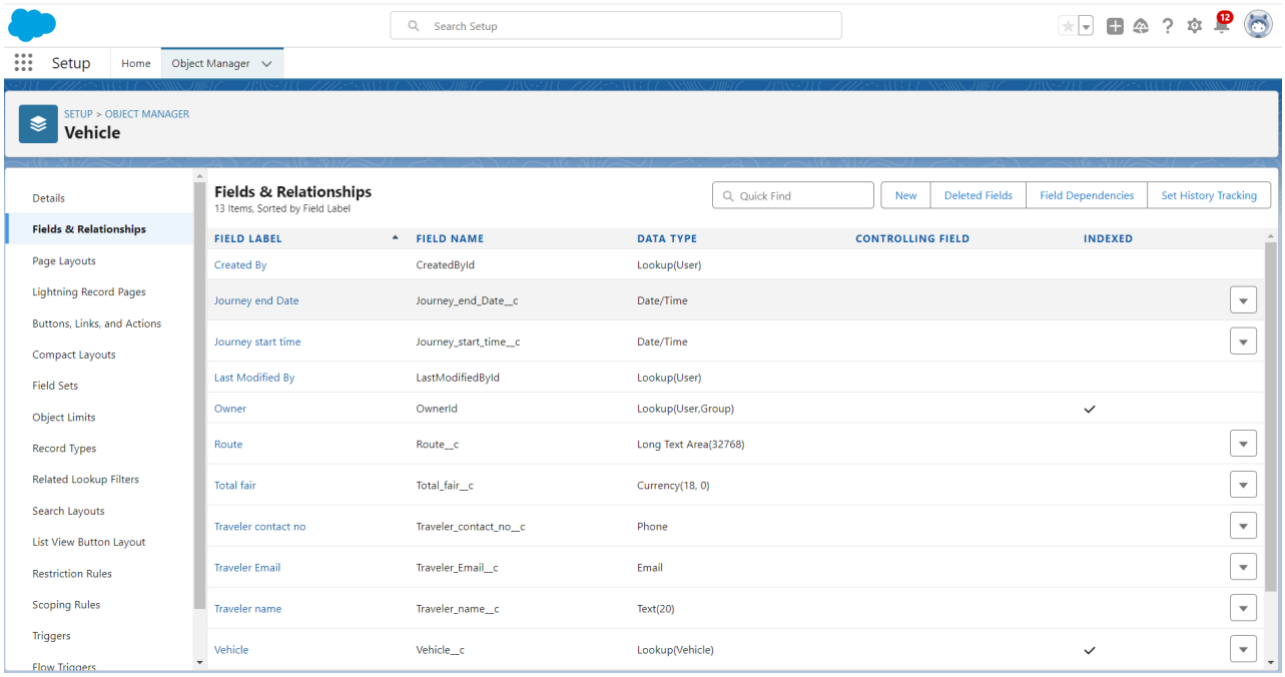

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Driver
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Details
Edit
Delete
Description
API Name
Driver__c
Custom
Singular Label
Driver
Plural Label
Drivers
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

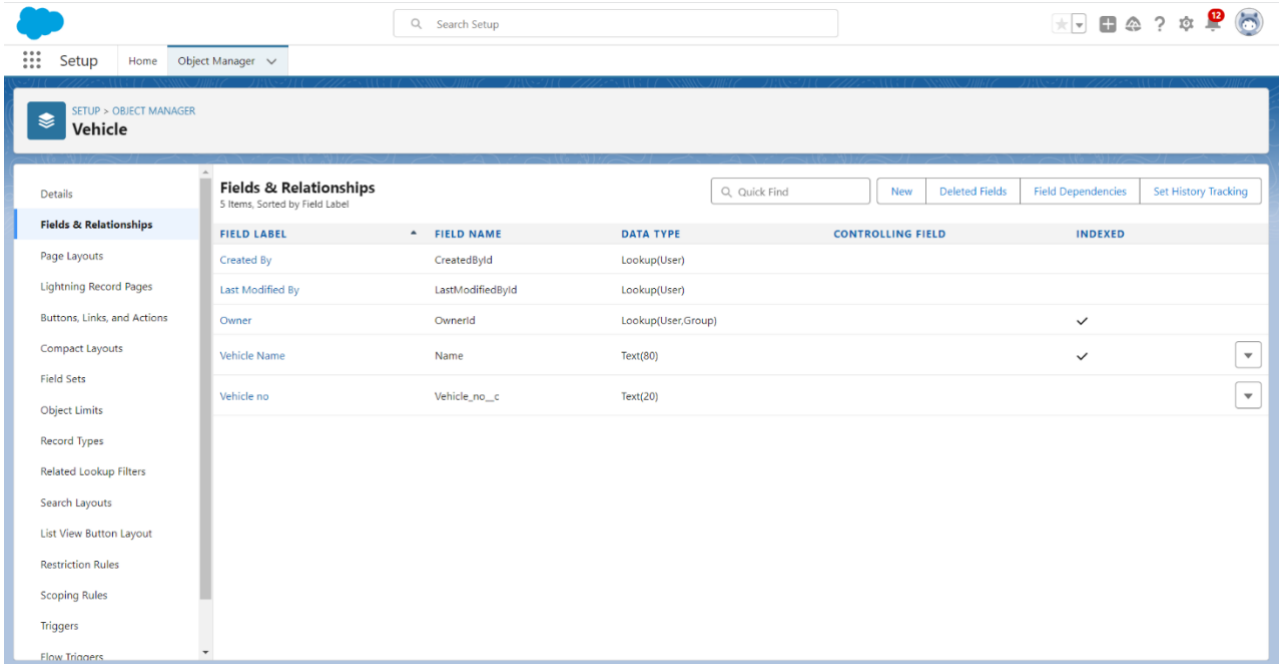

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Traveler
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Details
Edit
Delete
Description
API Name
Traveler__c
Custom
Singular Label
Traveler
Plural Label
Travelers
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window

Step 3 : CREATE AFIELD RELATIONSHIP (DRIVER,TRAVELER)

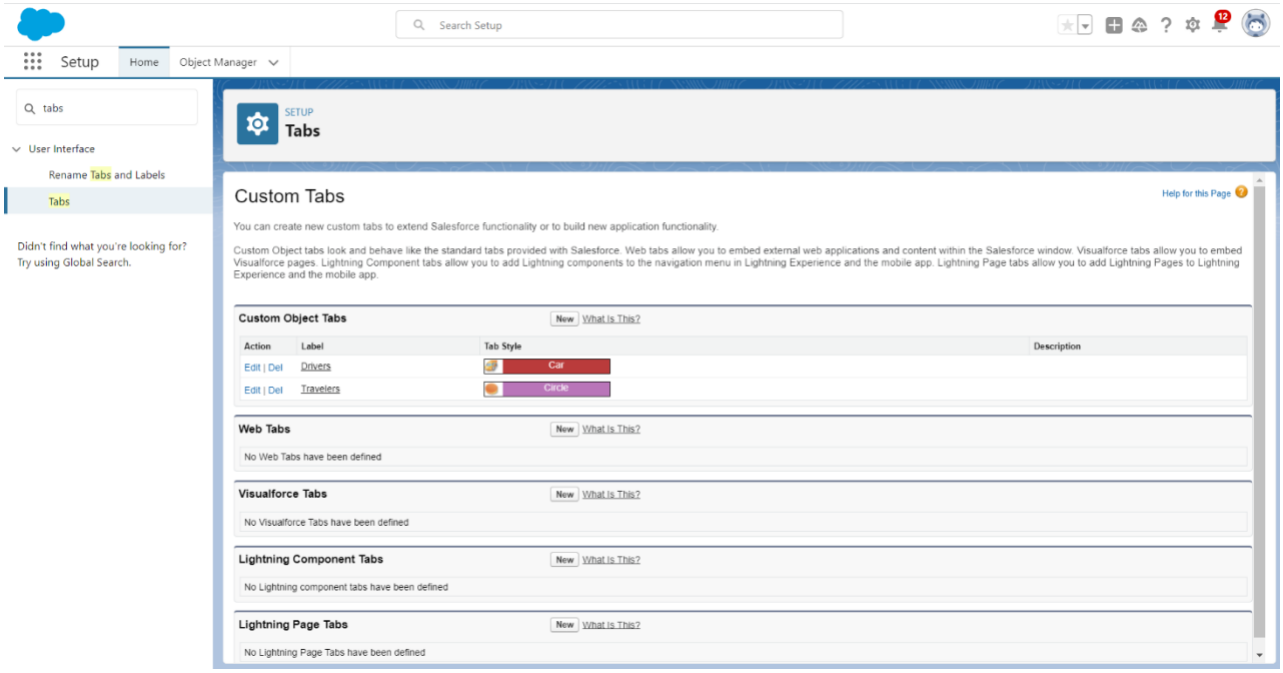




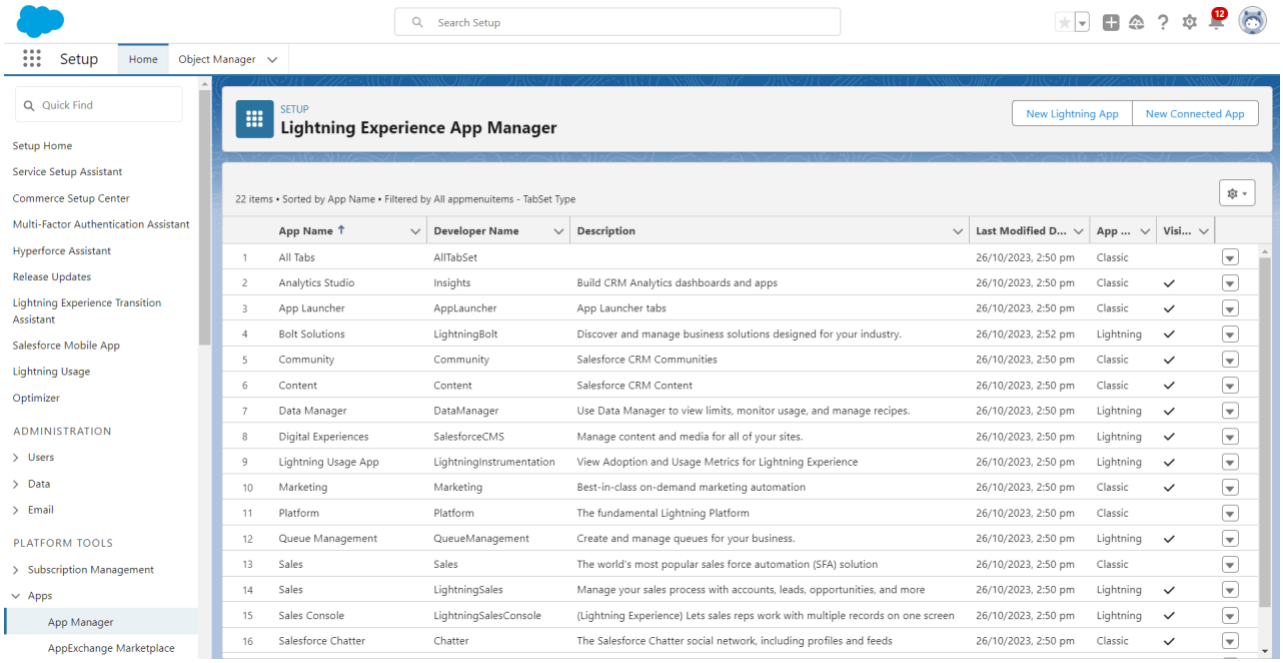

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Vehicle
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Fields & Relationships
13 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Created By
CreatedById
Lookup(User)
Journey end Date
Journey_end_Date__c
Date/Time
Journey start time
Journey_start_time__c
Date/Time
Last Modified By
LastModifiedById
Lookup(User)
Owner
OwnerId
Lookup(User,Group)
Route
Route__c
Long Text Area(32768)
Total fair
Total_fair__c
Currency(18, 0)
Traveler contact no
Traveler_contact_no__c
Phone
Traveler Email
Traveler_Email__c
Email
Traveler name
Traveler_name__c
Text(20)
Vehicle
Vehicle__c
Lookup(Vehicle)


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Vehicle
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Fields & Relationships
5 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Created By
CreatedById
Lookup(User)
Last Modified By
LastModifiedById
Lookup(User)
Owner
OwnerId
Lookup(User,Group)
Vehicle Name
Name
Text(80)
Vehicle no
Vehicle_no__c
Text(20)

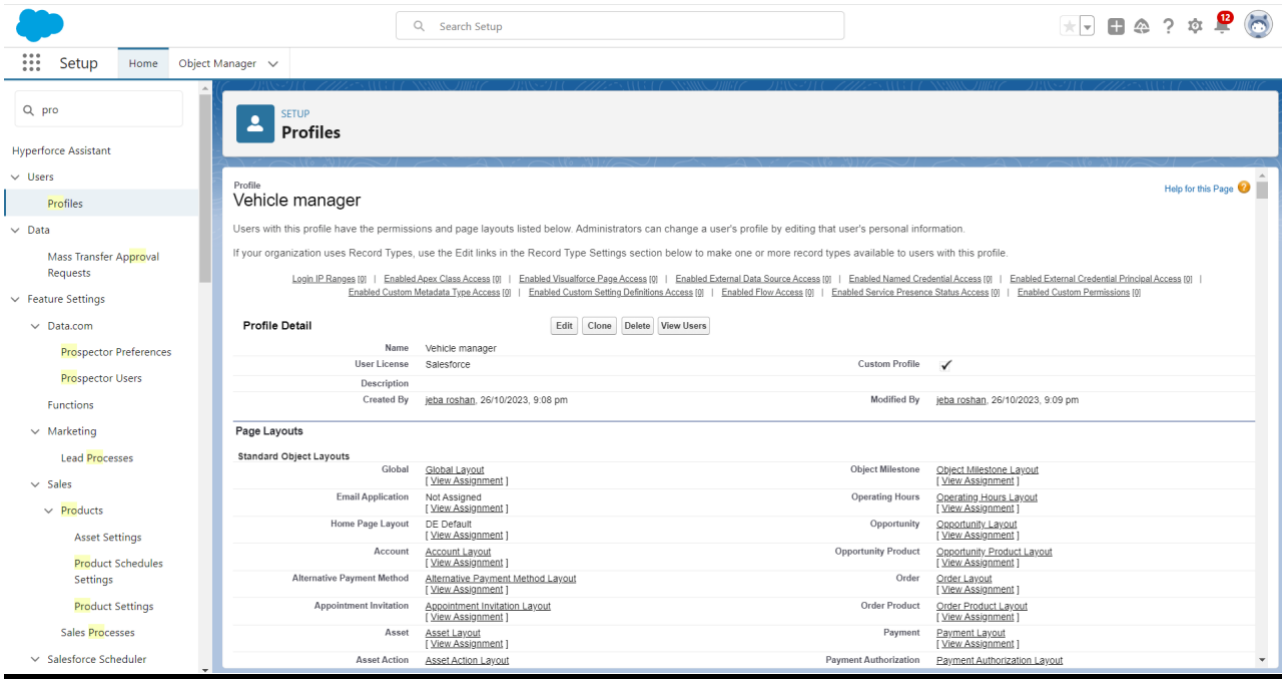
1`


Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
SETUP
Tabs
Custom Tabs
Help for this Page
You can create new custom tabs to extend Salesforce functionality or to build new application functionality.
Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.
Custom Object Tabs
New
What Is This?
Action
Label
Tab Style
Description
Edit | Del
Drivers
Car
Edit | Del
Travelers
Circle
Web Tabs
New
What Is This?
No Web Tabs have been defined
Visualforce Tabs
New
What Is This?
No Visualforce Tabs have been defined
Lightning Component Tabs
New
What Is This?
No Lightning component tabs have been defined
Lightning Page Tabs
New
What Is This?
No Lightning Page Tabs have been defined

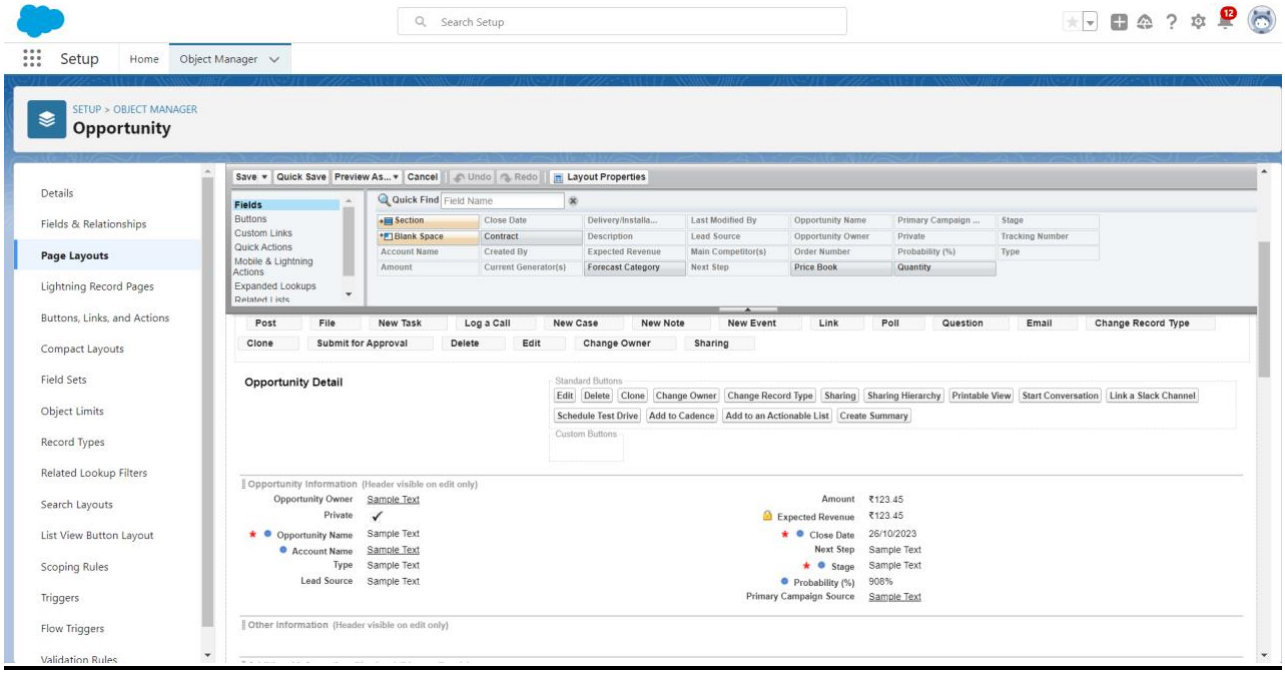
Step 5 : Create a Lightning App



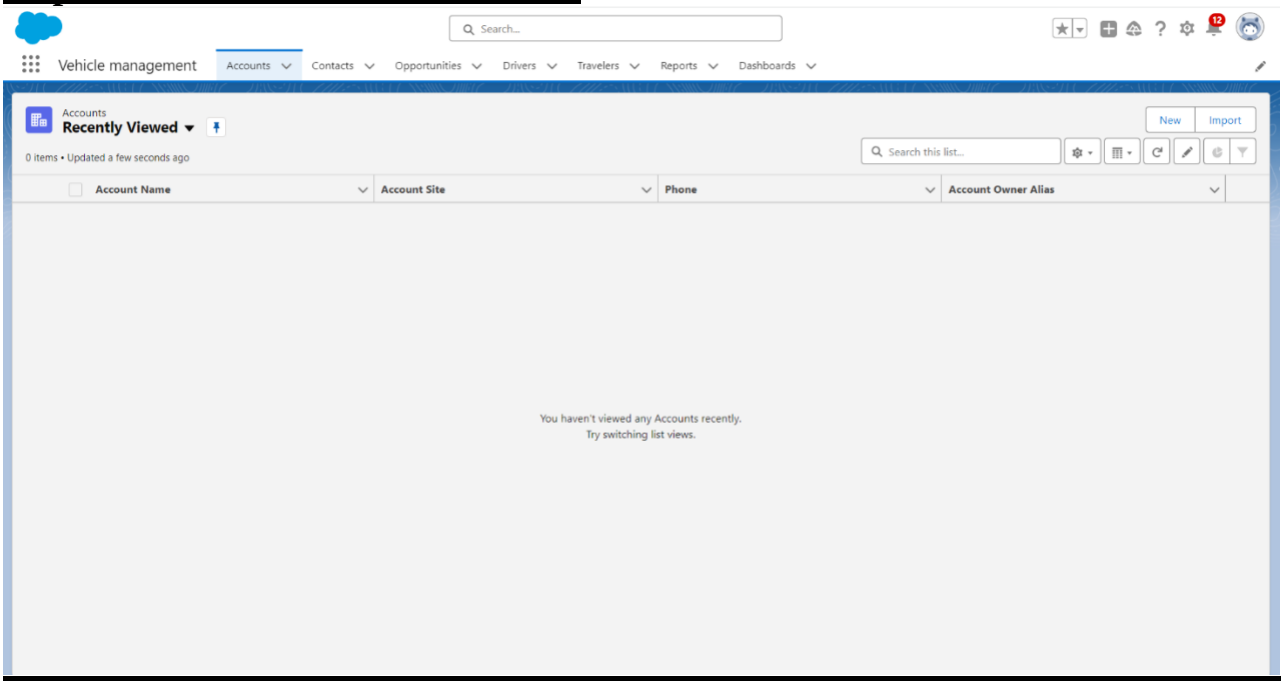
Step 6 : Create the PROFILE

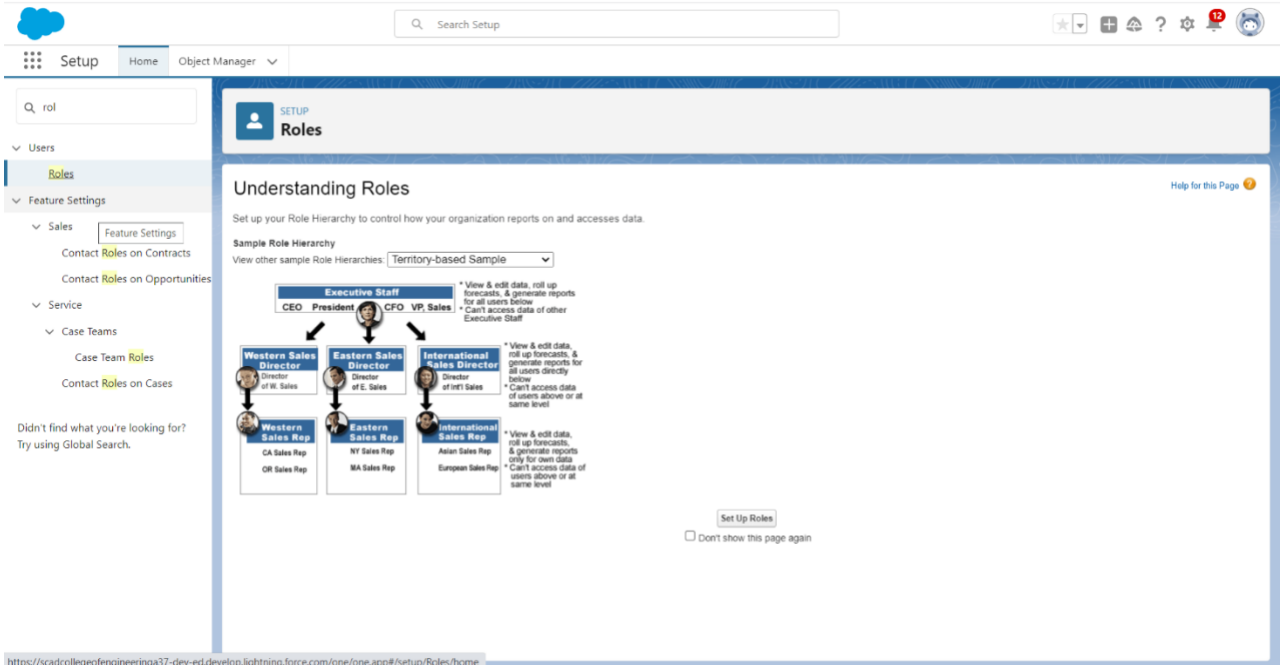


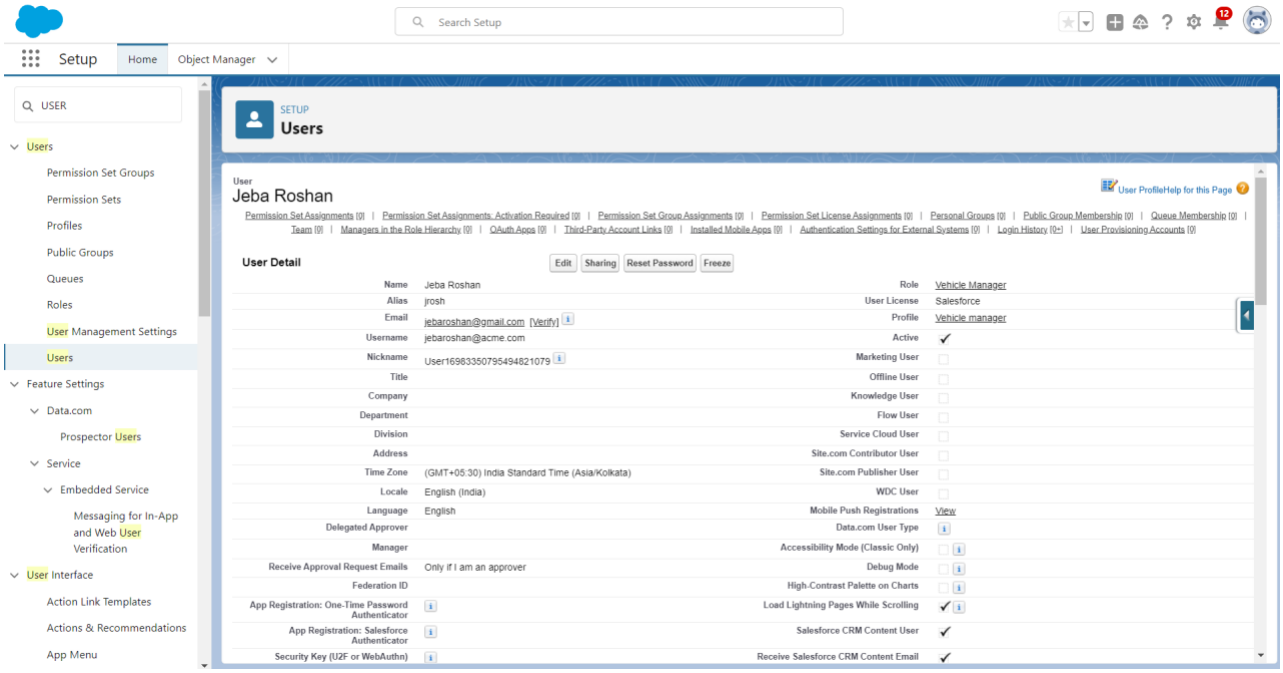
Step 7 : Create the User



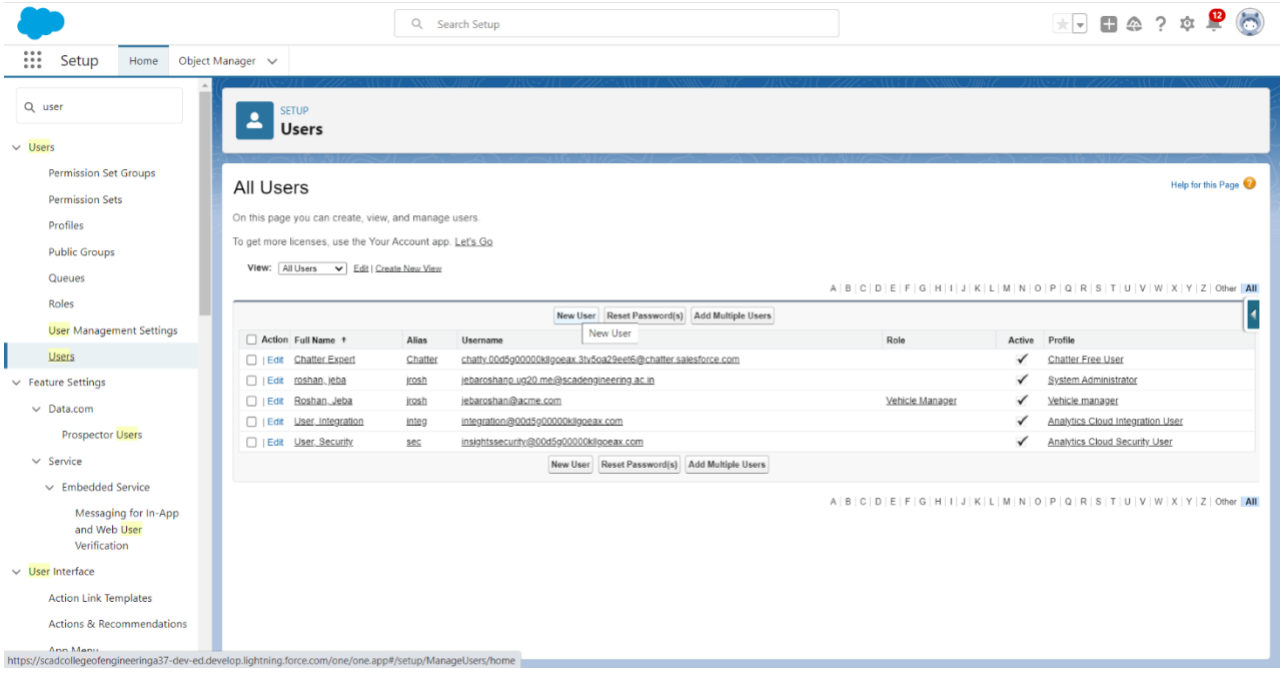
Step 8 : Create the PAGE LAYOUT



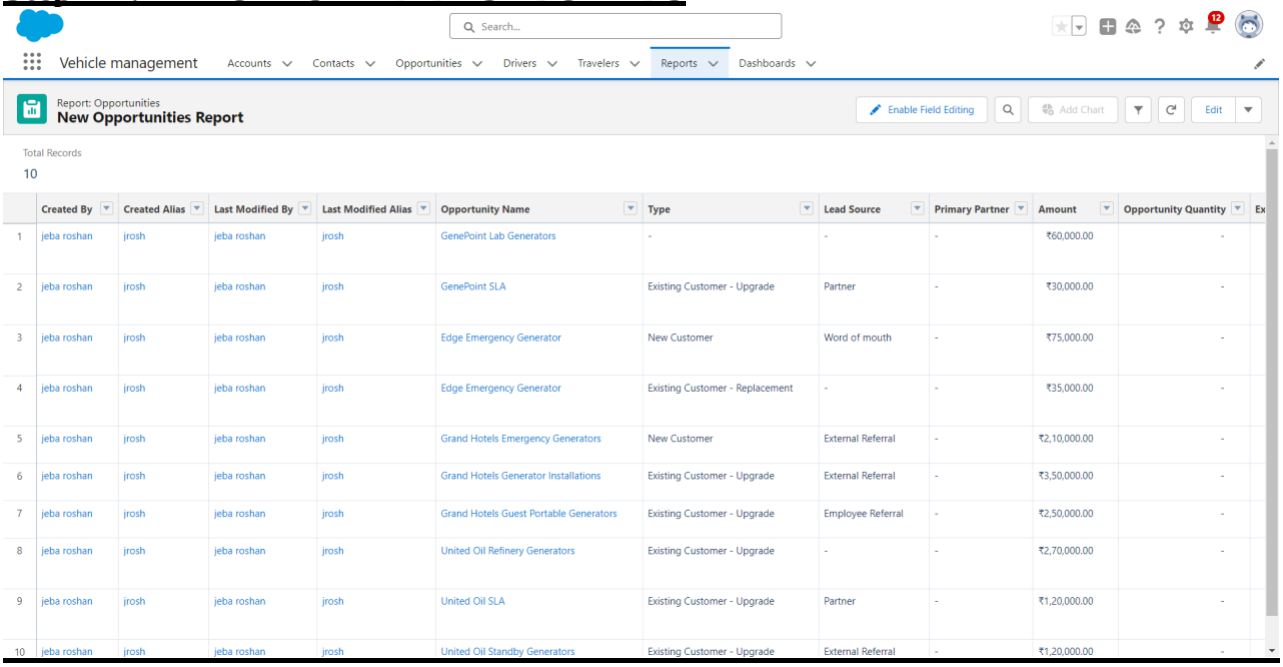




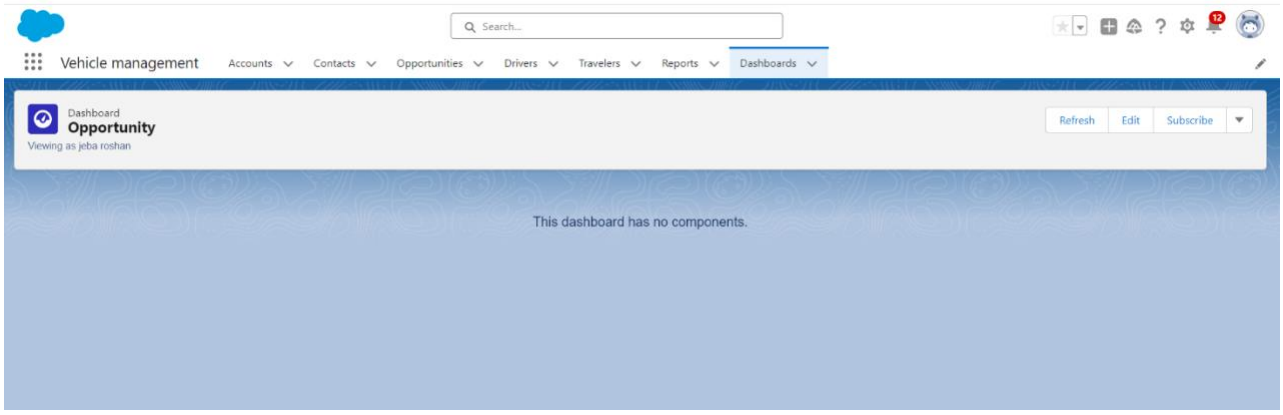
Step 10 : Create user adoption

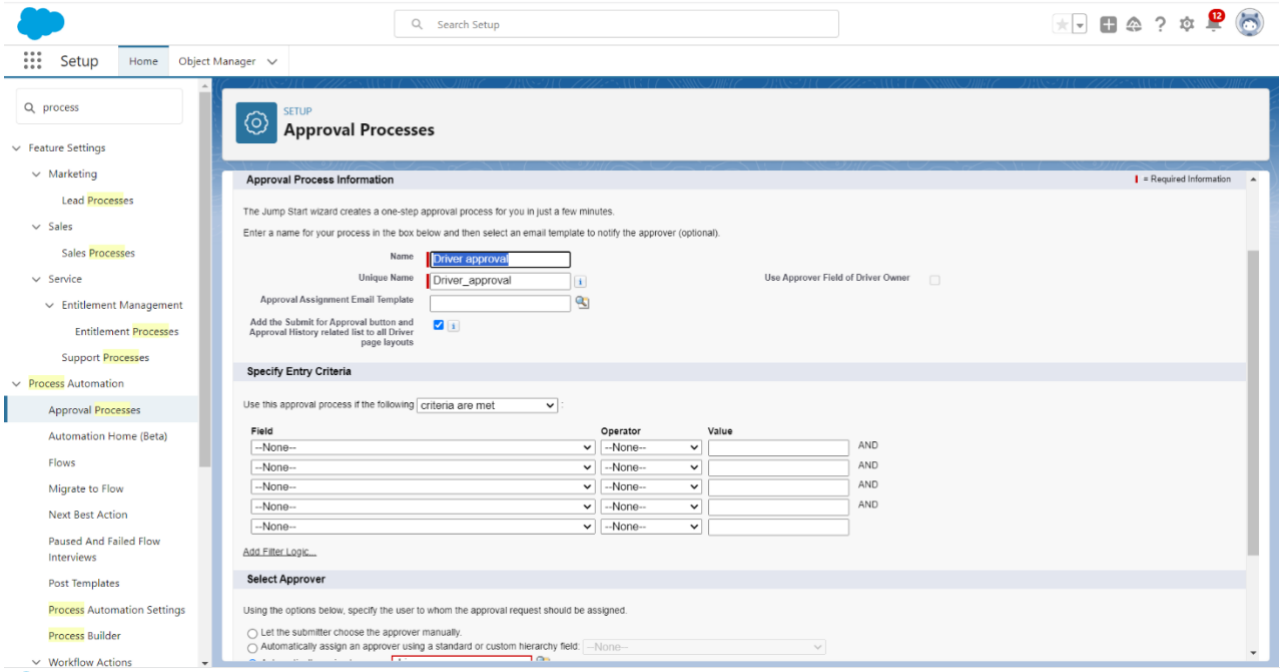


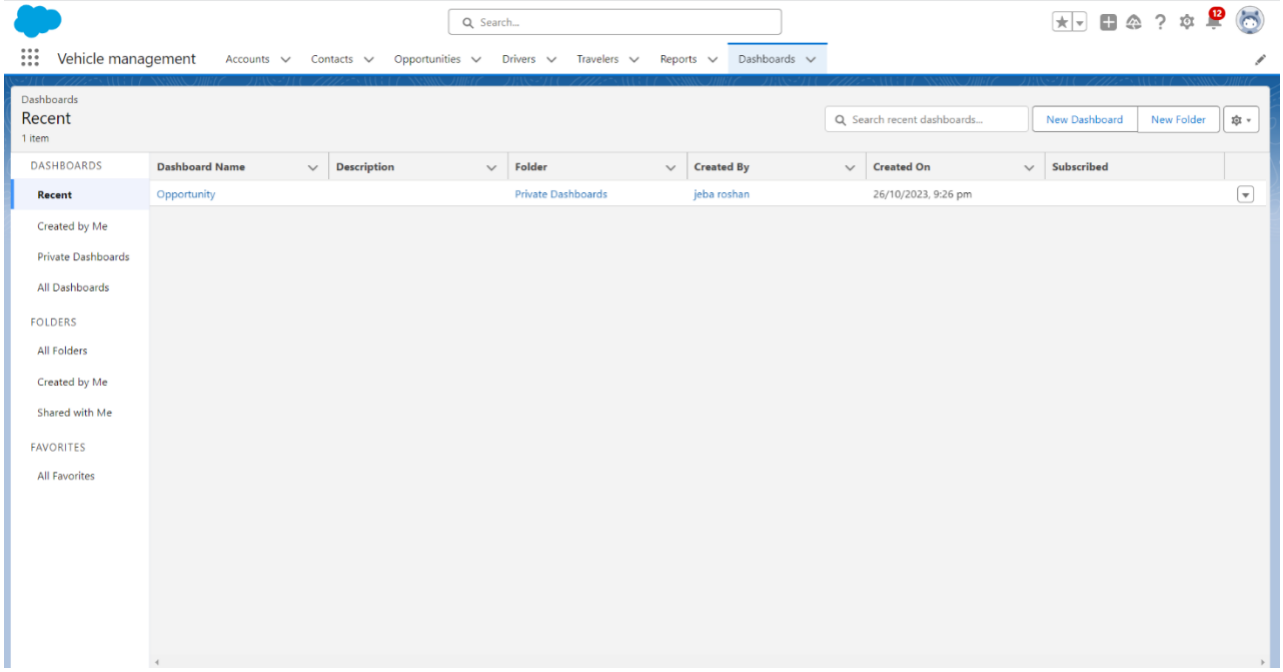
Step 11 : REPORTS AND DASHBOARDS



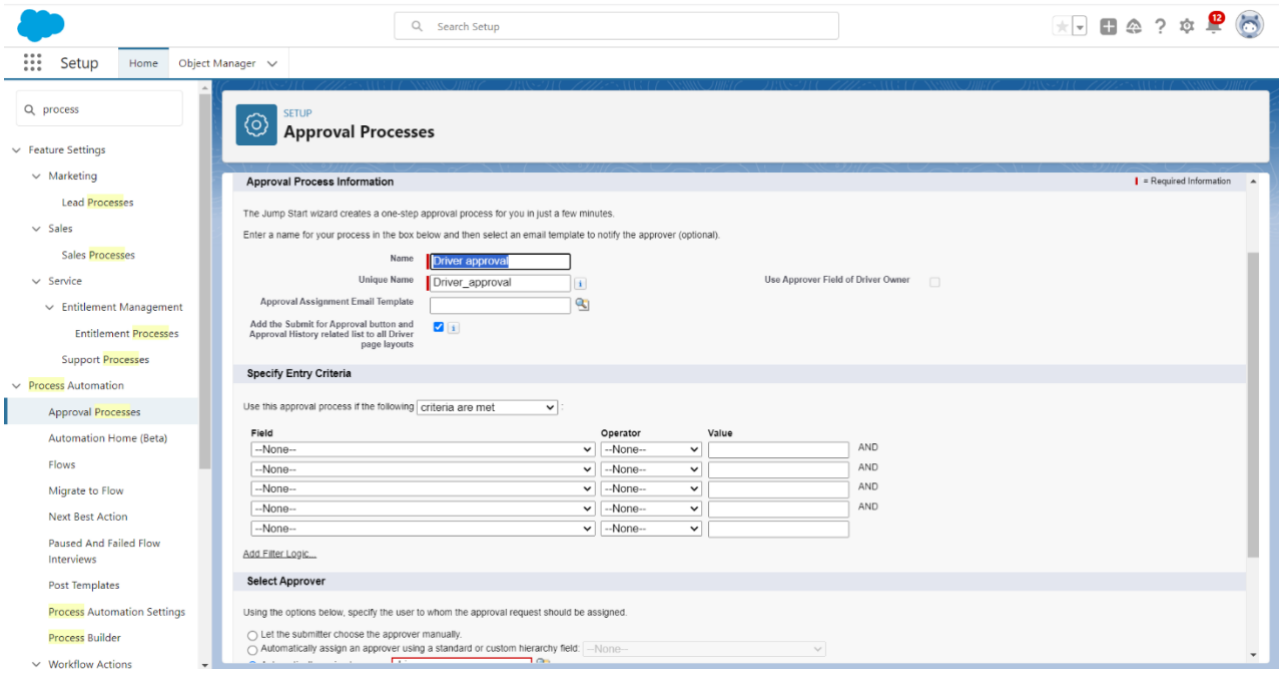
	Created By	Created Alias	Last Modified By	Last Modified Alias	Opportunity Name	Type	Lead Source	Primary Partner	Amount	Opportunity Quantity
1	jeba roshan	jrosh	jeba roshan	jrosh	GenePoint Lab Generators	-	-	-	₹60,000.00	-
2	jeba roshan	jrosh	jeba roshan	jrosh	GenePoint SLA	Existing Customer - Upgrade	Partner	-	₹30,000.00	-
3	jeba roshan	jrosh	jeba roshan	jrosh	Edge Emergency Generator	New Customer	Word of mouth	-	₹75,000.00	-
4	jeba roshan	jrosh	jeba roshan	jrosh	Edge Emergency Generator	Existing Customer - Replacement	-	-	₹35,000.00	-
5	jeba roshan	jrosh	jeba roshan	jrosh	Grand Hotels Emergency Generators	New Customer	External Referral	-	₹2,10,000.00	-
6	jeba roshan	jrosh	jeba roshan	jrosh	Grand Hotels Generator Installations	Existing Customer - Upgrade	External Referral	-	₹3,50,000.00	-
7	jeba roshan	jrosh	jeba roshan	jrosh	Grand Hotels Guest Portable Generators	Existing Customer - Upgrade	Employee Referral	-	₹2,50,000.00	-
8	jeba roshan	jrosh	jeba roshan	jrosh	United Oil Refinery Generators	Existing Customer - Upgrade	-	-	₹2,70,000.00	-
9	jeba roshan	jrosh	jeba roshan	jrosh	United Oil SLA	Existing Customer - Upgrade	Partner	-	₹1,20,000.00	-
10	jeba roshan	jrosh	jeba roshan	jrosh	United Oil Standby Generators	Existing Customer - Upgrade	External Referral	-	₹1,20,000.00	-



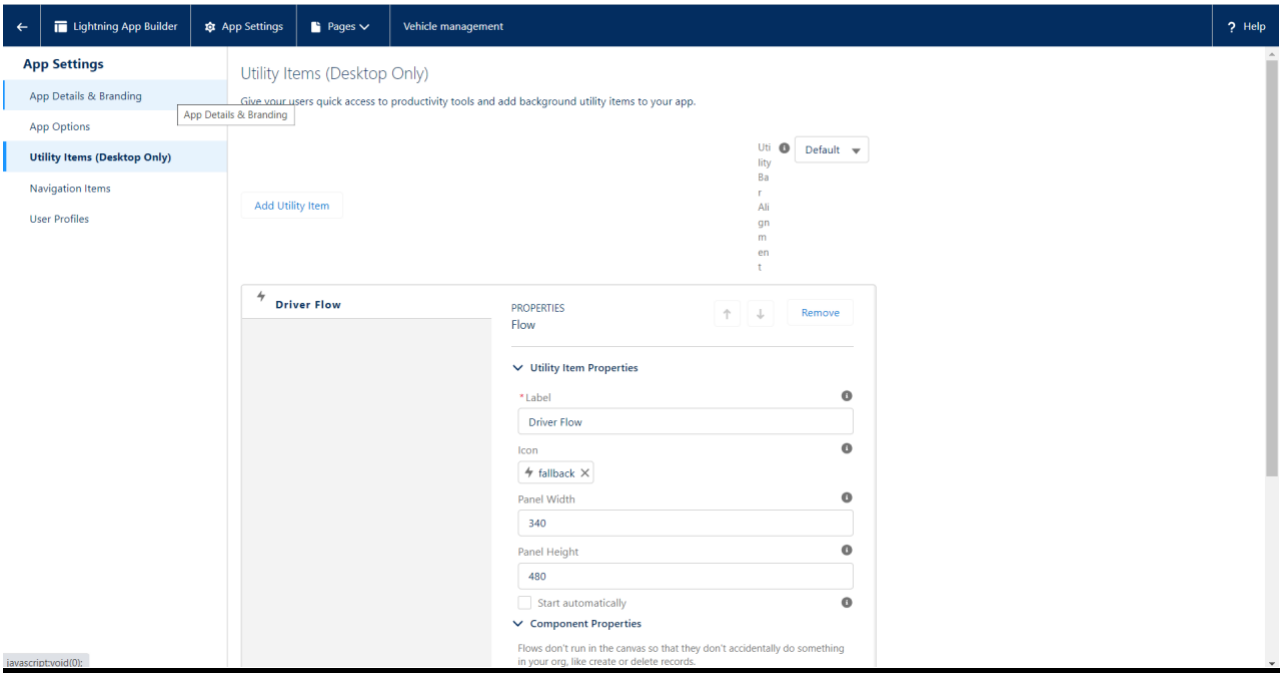

Search Setup
Setup
Home
Object Manager
process
Feature Settings
Marketing
Lead Processes
Sales
Sales Processes
Service
Entitlement Management
Entitlement Processes
Support Processes
Process Automation
Approval Processes
Automation Home (Beta)
Flows
Migrate to Flow
Next Best Action
Paused And Failed Flow Interviews
Post Templates
Process Automation Settings
Process Builder
Workflow Actions
SETUP
Approval Processes
Approval Process Information
= Required Information
The Jump Start wizard creates a one-step approval process for you in just a few minutes.
Enter a name for your process in the box below and then select an email template to notify the approver (optional).
Name
Driver approval
Unique Name
Driver_approval
Use Approver Field of Driver Owner
Approval Assignment Email Template
Add the Submit for Approval button and Approval History related list to all Driver page layouts
Specify Entry Criteria
Use this approval process if the following criteria are met
Field
Operator
Value
--None--
AND
Add Filter Logic...
Select Approver
Using the options below, specify the user to whom the approval request should be assigned.
Let the submitter choose the approver manually.
Automatically assign an approver using a standard or custom hierarchy field:

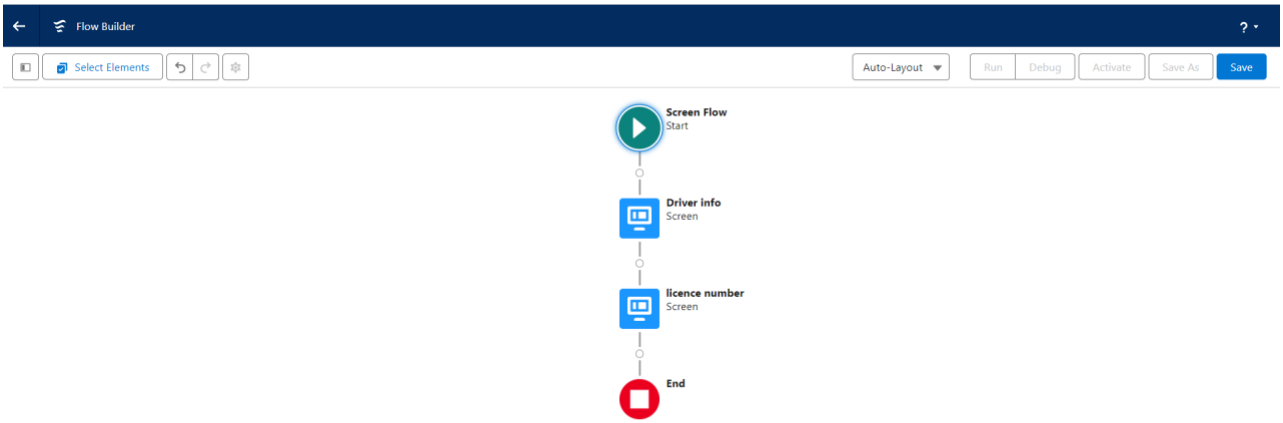
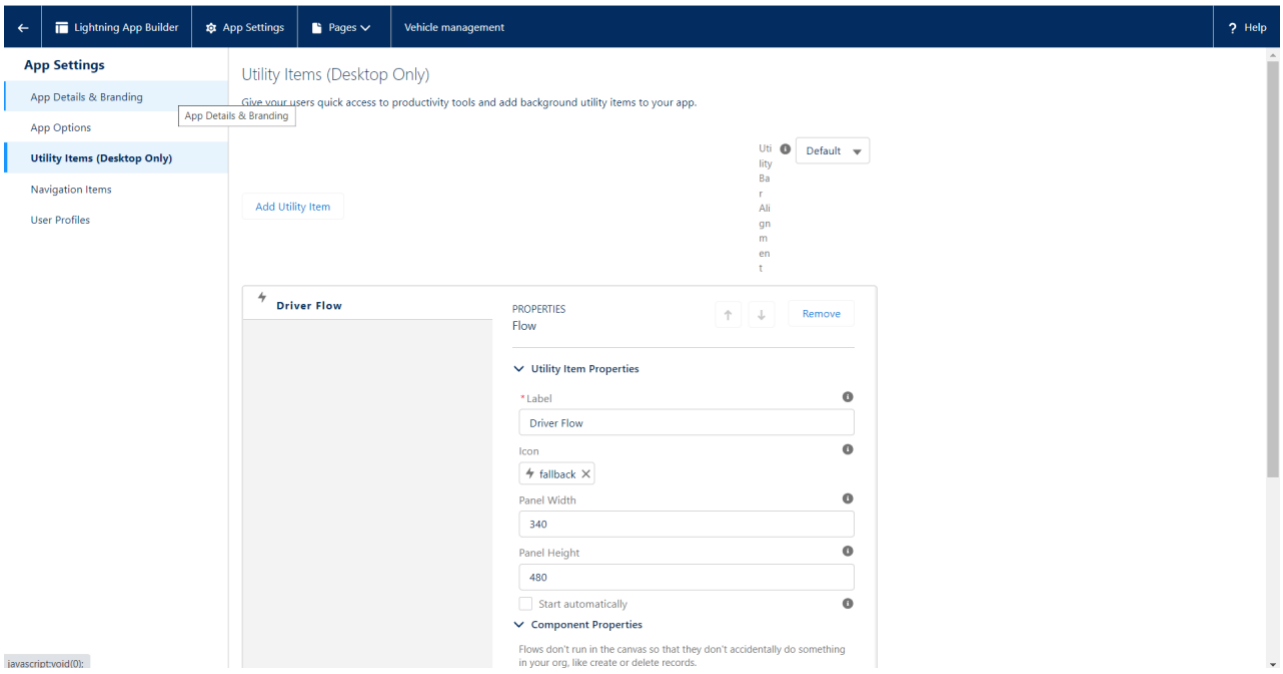

Search...
Vehicle management
Accounts
Contacts
Opportunities
Drivers
Travelers
Reports
Dashboards
Dashboards
Recent
1 item
Search recent dashboards...
New Dashboard
New Folder
DASHBOARDS
Recent
Created by Me
Private Dashboards
All Dashboards
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites
Dashboard Name
Description
Folder
Created By
Created On
Subscribed
Opportunity
Private Dashboards
jeba roshan
26/10/2023, 9:26 pm

Step 12 : Create view report and dashboard



Step 13 : Create A flow





Step 14 : Create App Page