

**NAAN MUDHALVAN**  
**SALESFORCE DEVELOPER PROJECT REPORT**

PROJECT TITLE: VEHICLE MANAGEMENT SYSTEM USING  
SALESFORCE.

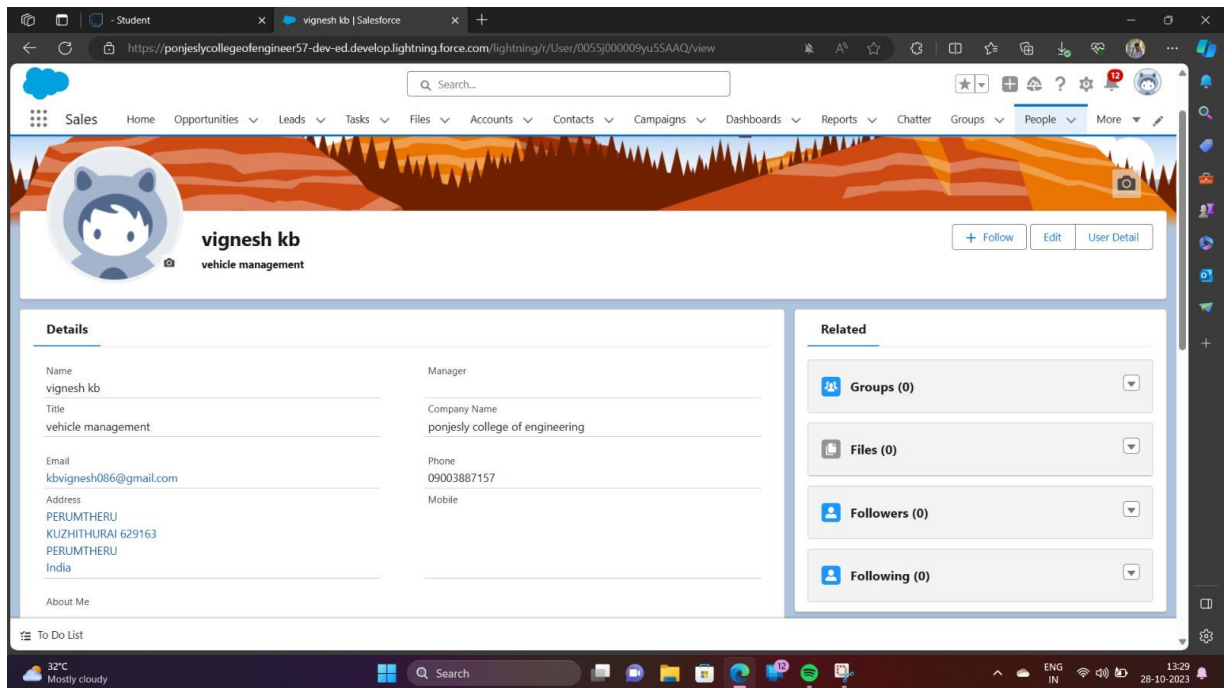
COLLEGE:               PONJESLY COLLEGE OF ENGINEERING.

BATCH-19

NAME	NM ID	REG NO
PRATHEESH RL	FCC735DFE06A7E9A1104E711FCBD2356	961820114056
M. AJITH	03B02734D0A1572AB7449567D7A0097C	961820114303
KJ PADMAMUTHURAJA	FE3AAAC544835588A184A152C111AD16	961820114319
VIGNESH KB	60A46F8E0EFE335A3604C8CB77155196	961820114328

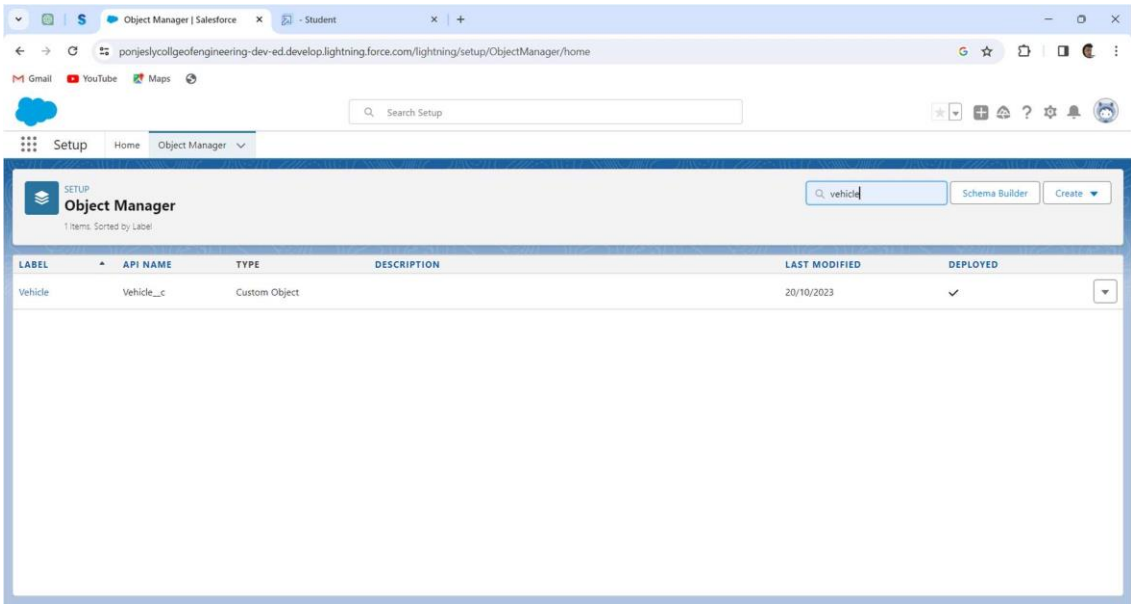
## Step 1: Creation Salesforce Org

### Creating Developer Account

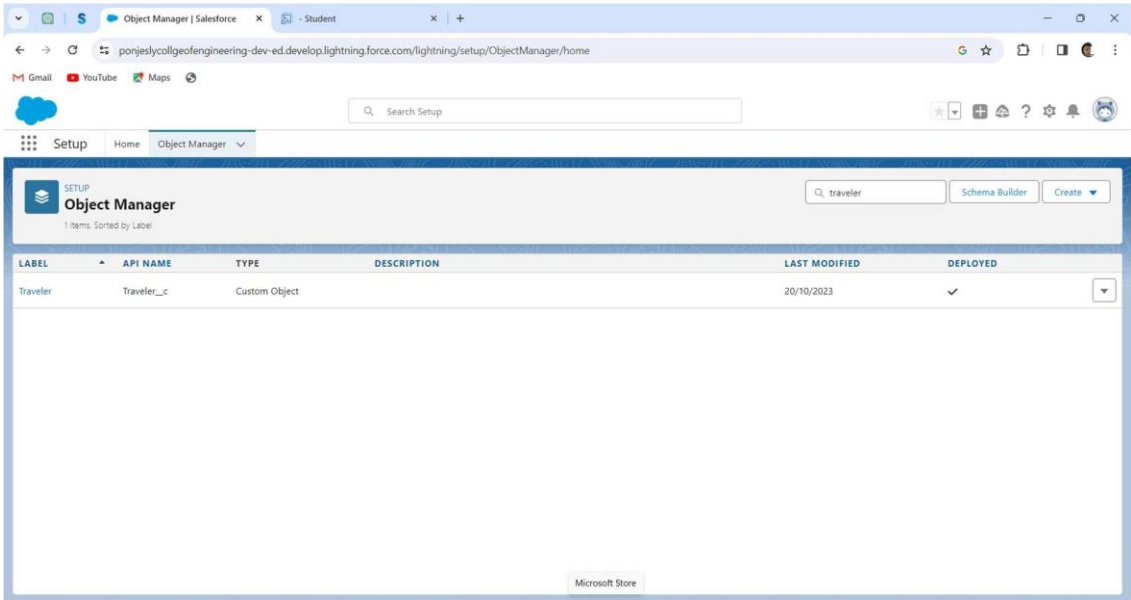


Step 2: To create an object as Vehicle, Driver, Traveler

Vehicle



Traveler



# Driver

Object Manager | Salesforce

Student

ponjeslycollgeofengineering-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Gmail

YouTube

Maps

Search Setup

Setup

Home

Object Manager

Object Manager

1 item, Sorted by Label

driver

Schema Builder

Create

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Driver	Driver__c	Custom Object		20/10/2023	✓

# Step 3: Fields and Relationship

## Fields in Vehicle Object

Vehicle | SalesforceStudent

ponjeslycollgeofengineering-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j0000037FqG/FieldsAndRelationships/view

GmailYouTubeMaps

Search Setup

SetupHomeObject Manager

Vehicle

Details

Fields & Relationships

19 Items, Sorted by Field Label

Quick FindNewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
2WHEELERS	X2WHEELERS_c	Picklist	vehicle type	
4 wheelers	X4_WHEELERS_c	Picklist	vehicle type	
body type	body_type__c	Text(20)		
chassic no	chassic_no__c	Text(30)		
colour	colour__c	Text(20)		
condition	condition__c	Picklist		
Created By	CreatedById	Lookup(User)		
journey end date	journey_end_date__c	Date/Time		

Vehicle | SalesforceStudent

ponjeslycollgeofengineering-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j0000037FqG/FieldsAndRelationships/view

GmailYouTubeMaps

Search Setup

SetupHomeObject Manager

Vehicle

Details

Fields & Relationships

19 Items, Sorted by Field Label

Quick FindNewDeleted FieldsField DependenciesSet History Tracking

journey start date	journey_start_date__c	Date/Time		
Last Modified By	LastModifiedById	Lookup(User)		
mileage	mileage__c	Text(3)		
Owner	OwnerId	Lookup(User,Group)		✓
route	route__c	Long Text Area(32768)		
seats	seats__c	Number(2, 0)		
total fair	total_fair__c	Currency(8, 0)		
vehicle includes	vehicle_includes__c	Picklist (Multi-Select)		
Vehicle Name	Name	Text(80)		✓

# Fields in Driver Objects

Driver | Salesforce

Student

ponjeslycollgeofengineering-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015j0000037FqL/FieldsAndRelationships/view

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

Fields & Relationships

8 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)		
Driver Name	Name	Text(80)		✓
fair per hour	fair_per_hour__c	Text(10)		
Last Modified By	LastModifiedById	Lookup(User)		
license no	license_no__c	Text(30)		
mobile no	mobile_no__c	Phone		
Owner	OwnerId	Lookup(User.Group)		✓
Vehicle	Vehicle__c	Lookup(Vehicle)		✓

# Fields in Traveler object

Traveler | Salesforce

Student

ponjeslycollgeofengineering-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/015j0000037FqQ/FieldsAndRelationships/view

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

Fields & Relationships

6 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)		✓
traveler contact no	traveler_contact_no__c	Phone		
traveler Email	traveler_email__c	Email		
Traveler Name	Name	Text(80)		✓

# Fields in Opportunity Objects

Opportunity | Salesforce

Student

ponjeslycollgeofengineering-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Opportunity/FieldsAndRelationships/view

GmailYouTubeMaps

Search Setup

SetupHomeObject Manager

SETUP > OBJECT MANAGER

Opportunity

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

Scoping Rules

Fields & Relationships

31 Items, Sorted by Field Label

Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

Journey end date	journey_end_date__c	Date/Time	
Journey start date	journey_start_date__c	Date/Time	
Last Modified By	LastModifiedById	Lookup(User)	
Lead Source	LeadSource	Picklist	
Main Competitor(s)	MainCompetitors__c	Text(100)	
Next Step	NextStep	Text(255)	
Opportunity Name	Name	Text(120)	✓
Opportunity Owner	OwnerId	Lookup(User)	✓
Opportunity Score	lqScore	Number(9, 0)	
Order Number	OrderNumber__c	Text(8)	

Opportunity | Salesforce

Student

ponjeslycollgeofengineering-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/Opportunity/FieldsAndRelationships/view

GmailYouTubeMaps

Search Setup

SetupHomeObject Manager

SETUP > OBJECT MANAGER

Opportunity

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

Scoping Rules

Fields & Relationships

31 Items, Sorted by Field Label

Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

Private	IsPrivate	Checkbox	
Probability (%)	Probability	Percent(3, 0)	
Quantity	TotalOpportunityQuantity	Number(16, 2)	
route	route__c	Long Text Area(32768)	
Stage	StageName	Picklist	
total fair	total_fair__c	Currency(8, 0)	
Tracking Number	TrackingNumber__c	Text(12)	
Type	Type	Picklist	
Vehicle	Vehicle__c	Lookup(Vehicle)	✓

## Step 4: Page layout setup

The screenshot shows the Salesforce Setup interface for configuring the Opportunity page layout. The left sidebar contains navigation options: Details, Fields & Relationships, Page Layouts (selected), 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 Scoping Rules. The main area displays the 'Layout Properties' for the Opportunity object. It includes a 'Fields' list on the left and a 'Quick Find' search bar. The layout preview shows a form with fields grouped into sections: 'Opportunity Information' (Opportunity Owner, Private, Opportunity Name, Account Name, Type, Lead Source, Vehicle, Journey start date, Journey end date, Total fair), 'Expected Revenue' (Amount, Expected Revenue, Close Date, Next Step, Stage, Probability (%), Primary Campaign Source), and 'Other information'. The bottom right corner indicates 'OneDrive - Personal' and 'You're not signed in'.

## Step 5: Lightning app

### Create the vehicle management app

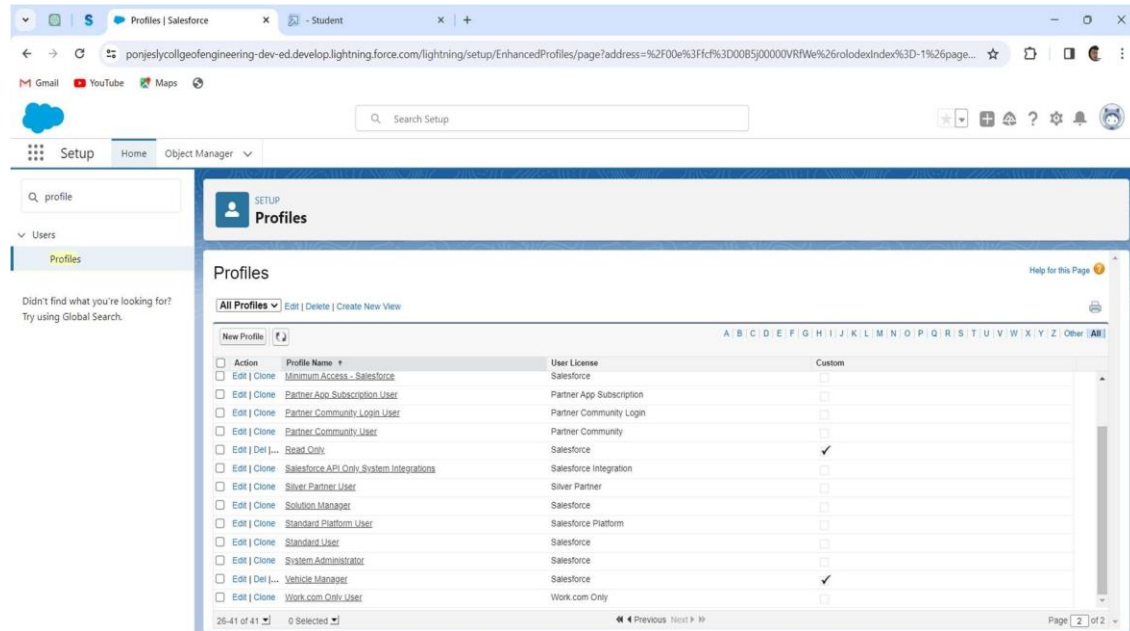
The screenshot shows the Salesforce Setup interface for creating a new Lightning app. The left sidebar contains navigation options: Apps (selected), Items, Vehicles, View All, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Scoping Rules. The main area displays the 'Vehicle Management' app configuration. It includes a 'Quick Find' search bar and a 'New' button. The table below lists the page layout assignments for the app.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Opportunity (Marketing) Layout	Ajay Y, 18/08/2023, 1:36 pm	Ajay Y, 28/10/2023, 12:37 pm
Opportunity (Sales) Layout	Ajay Y, 18/08/2023, 1:36 pm	Ajay Y, 28/10/2023, 12:37 pm
Opportunity (Support) Layout	Ajay Y, 18/08/2023, 1:36 pm	Ajay Y, 28/10/2023, 12:37 pm
Opportunity Layout	Ajay Y, 18/08/2023, 1:36 pm	Ajay Y, 28/10/2023, 12:37 pm



## Step 6: Profile

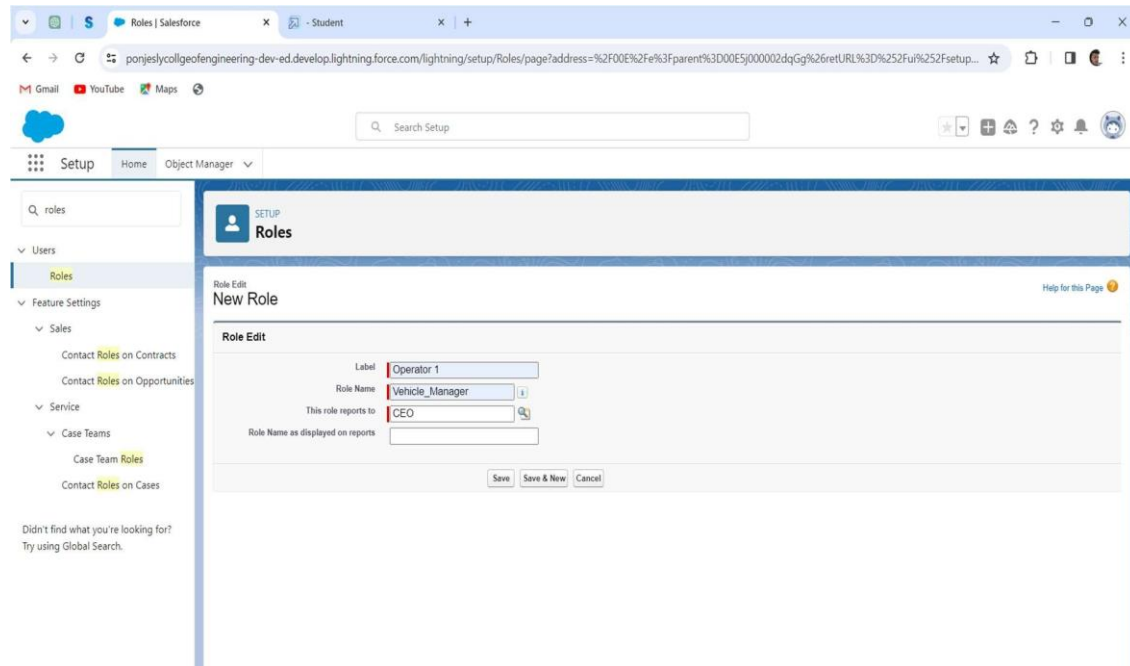
### Creating a profile



The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a search bar with 'profile' entered and a list of navigation items: Users, Profiles, and a search result. The main content area displays a table of profiles. The table has columns for Action, Profile Name, User License, and Custom. The 'Custom' column has checkboxes for each profile. The 'Standard User' profile is selected, and its 'Custom' checkbox is checked. The table is sorted by 'Profile Name' and shows 26 of 41 profiles. The bottom of the table indicates 'Page 2 of 2'.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit   Clone	Minimum Access - Salesforce	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Partner App Subscription User	Partner App Subscription	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Partner Community Login User	Partner Community Login	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Partner Community User	Partner Community	<input type="checkbox"/>
<input type="checkbox"/> Edit   Del...	Read Only	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Salesforce API Only System Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Standard User	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Clone	System Administrator	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit   Del...	Vehicle Manager	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit   Clone	Work.com Only User	Work.com Only	<input type="checkbox"/>

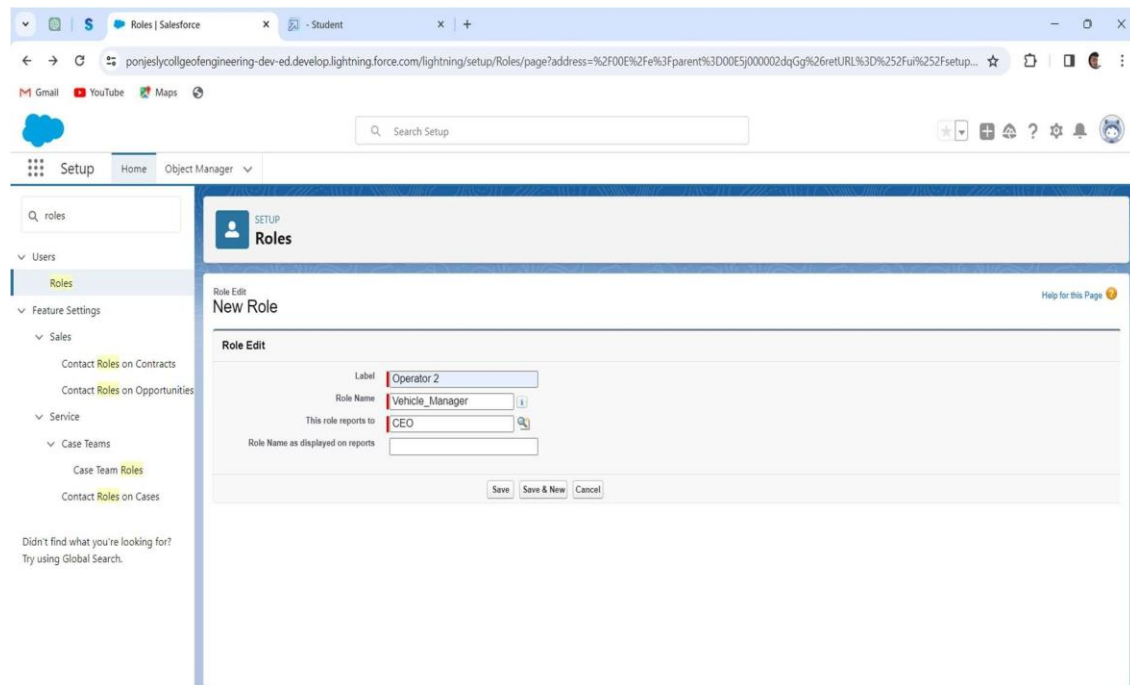
### Set up roles for Operator 1



The screenshot shows the Salesforce Setup interface for the 'Roles' section. The left sidebar contains a search bar with 'roles' entered and a list of navigation items: Users, Roles, Feature Settings, Sales, Service, Case Teams, and Case Team Roles. The main content area displays the 'New Role' form. The form has fields for Label, Role Name, This role reports to, and Role Name as displayed on reports. The 'Label' field is set to 'Operator 1', the 'Role Name' field is set to 'Vehicle\_Manager', and the 'This role reports to' field is set to 'CEO'. The 'Role Name as displayed on reports' field is empty. The form has 'Save', 'Save & New', and 'Cancel' buttons at the bottom.

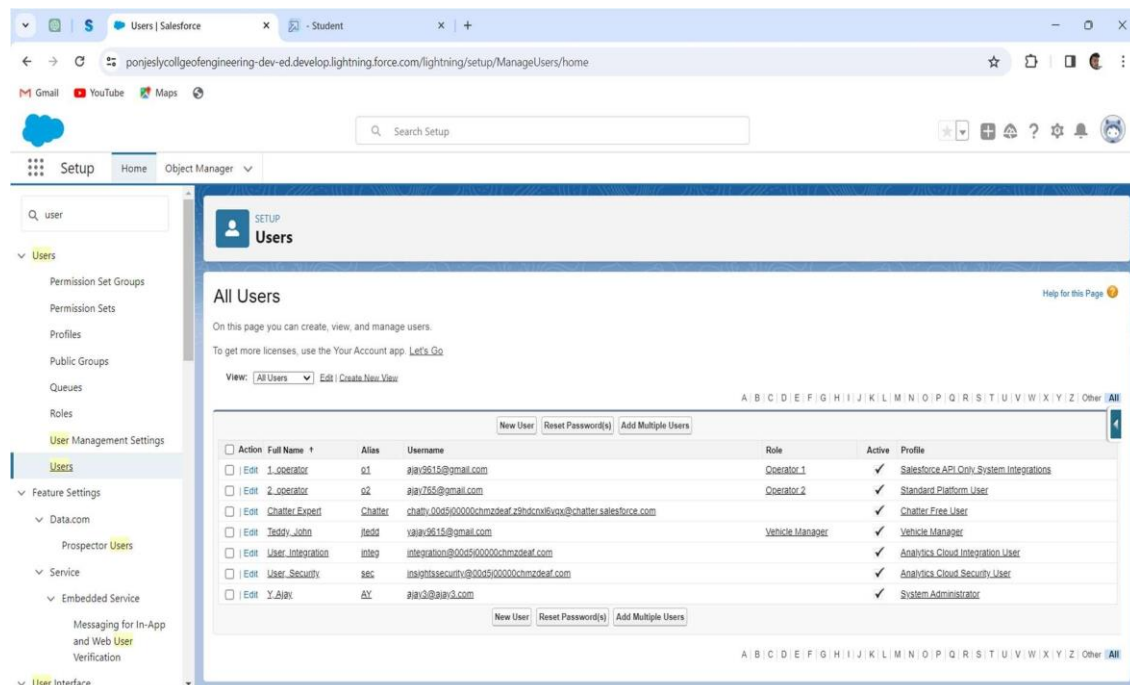
Field	Value
Label	Operator 1
Role Name	Vehicle_Manager
This role reports to	CEO
Role Name as displayed on reports	

## Set up role for Operator 2



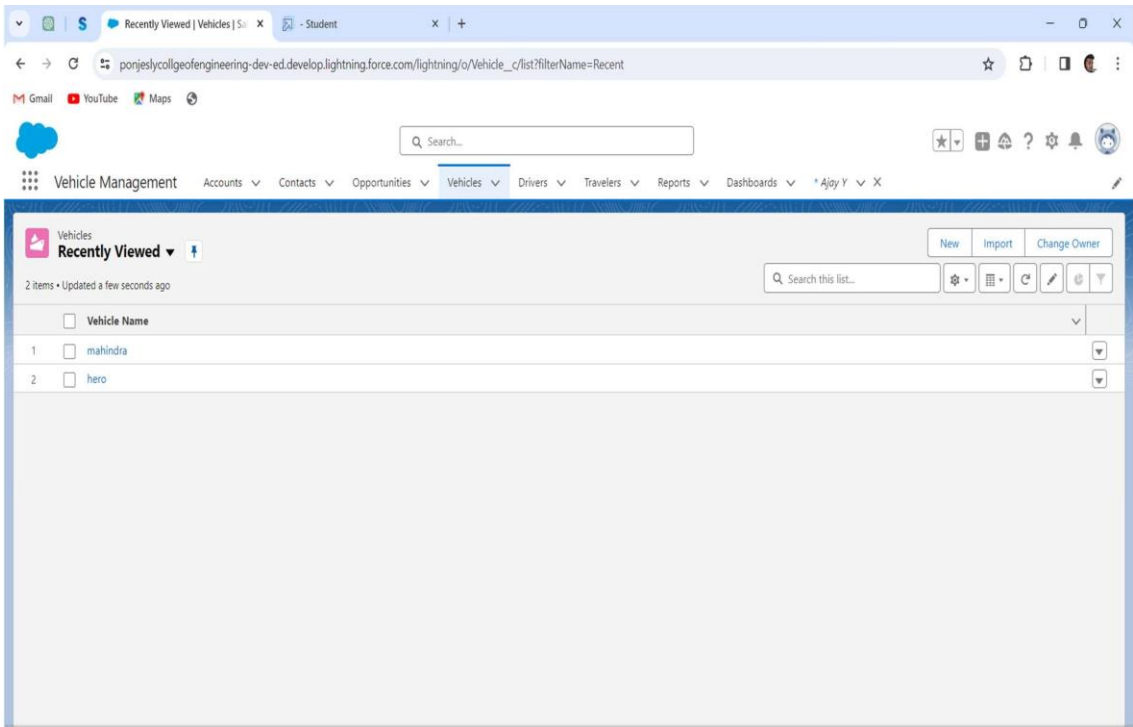
## Step 7: Users

### Creating a user for operator 1 and operator 2



# Step 8: User Adoption

## Create vehicle record



View Record

Vehicle Management

Accounts

Contacts

Opportunities

Vehicles

Drivers

Travelers

Reports

Dashboards

Ajay Y

X

Vehicle

mahindra

New Contact

Edit

New Opportunity

Related

Details

Vehicle Name

mahindra

Owner

Ajay Y

Vehicle no

yh65vh7546

vehicle type

2, 4 wheelers

2WHEELERS

4 wheelers

vjMAHINDRA

chassis no

746453467

colour

black

body type

metal

vehicle includes

fire extinguisher:first aid kit:multicharger kit:stepneytoolkit:tracing device:tyre jack

Created By

Ajay Y, 27/10/2023, 5:30 pm

Last Modified By

Ajay Y, 27/10/2023, 5:31 pm

Vehicle Management

Accounts

Contacts

Opportunities

Vehicles

Drivers

Travelers

Reports

Dashboards

Ajay Y

X

Vehicle

mahindra

New Contact

Edit

New Opportunity

Related

Details

fire extinguisher:first aid kit:multicharger kit:stepneytoolkit:tracing device:tyre jack

condition

good

mileage

15

seats

6

journey start date

03/10/2023, 12:00 pm

journey end date

02/11/2023, 12:00 pm

total fair

route

Created By

Ajay Y, 27/10/2023, 5:30 pm

Last Modified By

Ajay Y, 27/10/2023, 5:31 pm

# View Record

hero | Vehicle | Salesforce

- Student

ponjeslycollgeofengineering-dev-ed.develop.lightning.force.com/lightning/r/Vehicle\_\_c/a015j00000ZIR1XAAAX/view

GmailYouTubeMaps

Search...

StarHomeHelpSettingsNotifications

Vehicle ManagementAccountsContactsOpportunitiesVehiclesDriversTravelersReportsDashboardsAjay Y

Vehiclehero

New ContactEditNew Opportunity

RelatedDetails

Vehicle Namehero

Vehicle noth76d5464

vehicletype1.2 wheelers

2WHEELERS

ij HERO

4 wheelers

chassic no457437

colouryellow

body typemetal

vehicle includes

toolkittracing device,tyre

OwnerAjay Y

Driver Flow

hero | Vehicle | Salesforce

- Student

ponjeslycollgeofengineering-dev-ed.develop.lightning.force.com/lightning/r/Vehicle\_\_c/a015j00000ZIR1XAAAX/view

GmailYouTubeMaps

Search...

StarHomeHelpSettingsNotifications

Vehicle ManagementAccountsContactsOpportunitiesVehiclesDriversTravelersReportsDashboardsAjay Y

Vehiclehero

New ContactEditNew Opportunity

vehicle includes

toolkittracing device,tyre

conditiongood

mileage35

seats2

journey start date03/10/2023, 12:00 pm

journey end date03/11/2023, 12:00 pm

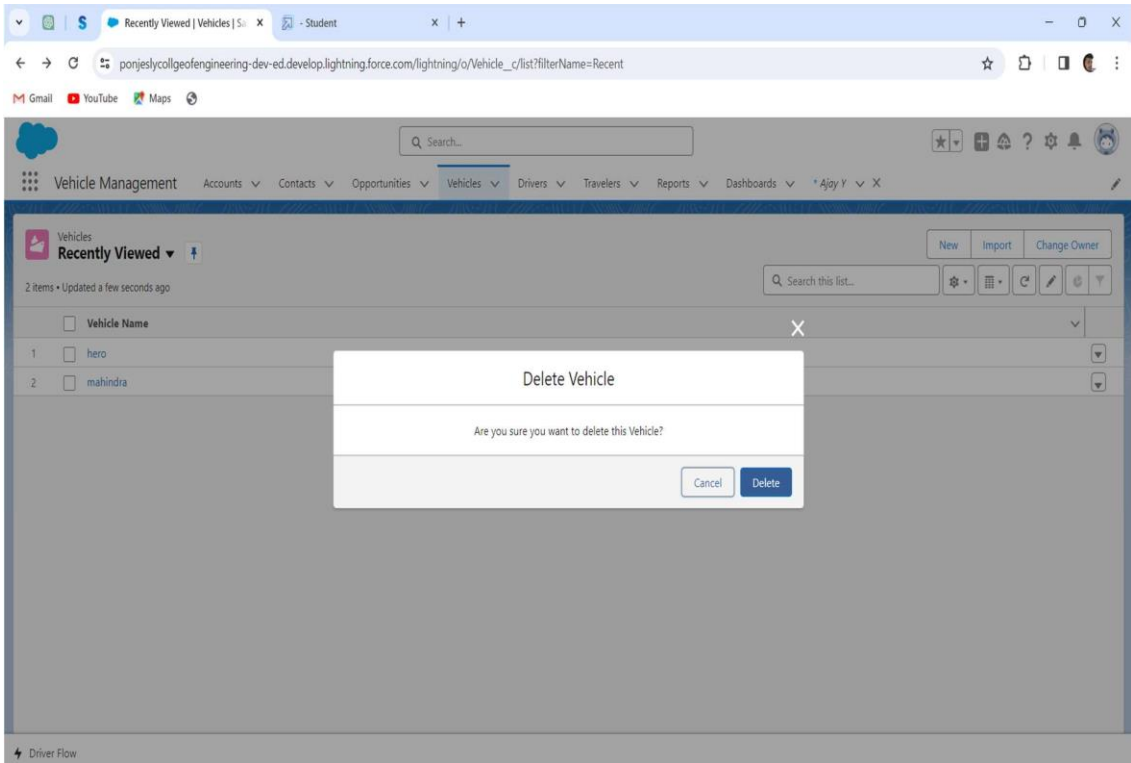
total fair

route

Created ByAjay Y, 27/10/2023, 5:28 pm

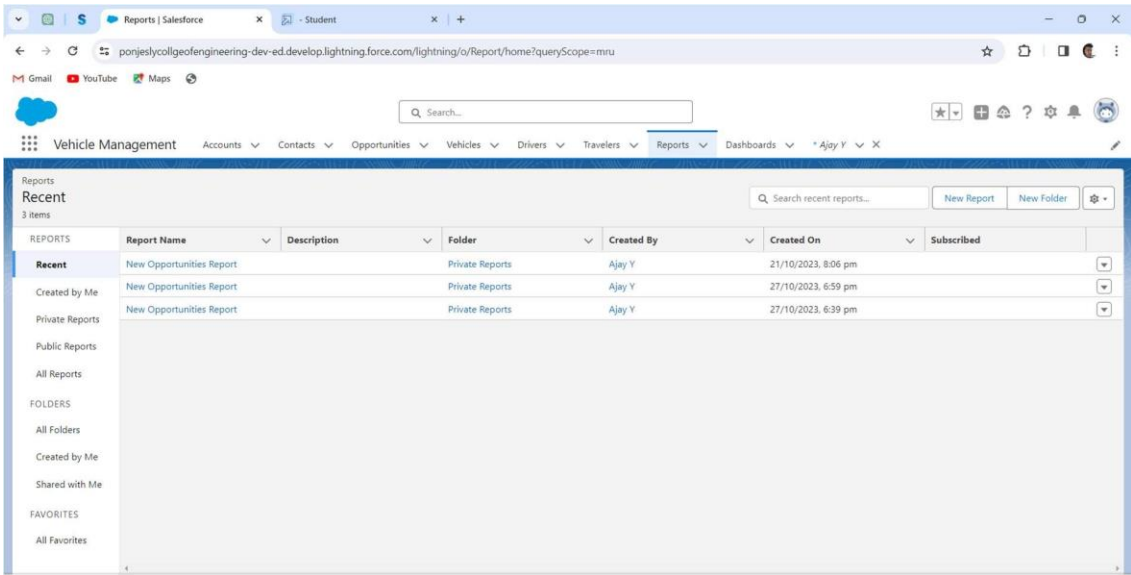
Last Modified ByAjay Y, 27/10/2023, 5:28 pm

# Delete Record

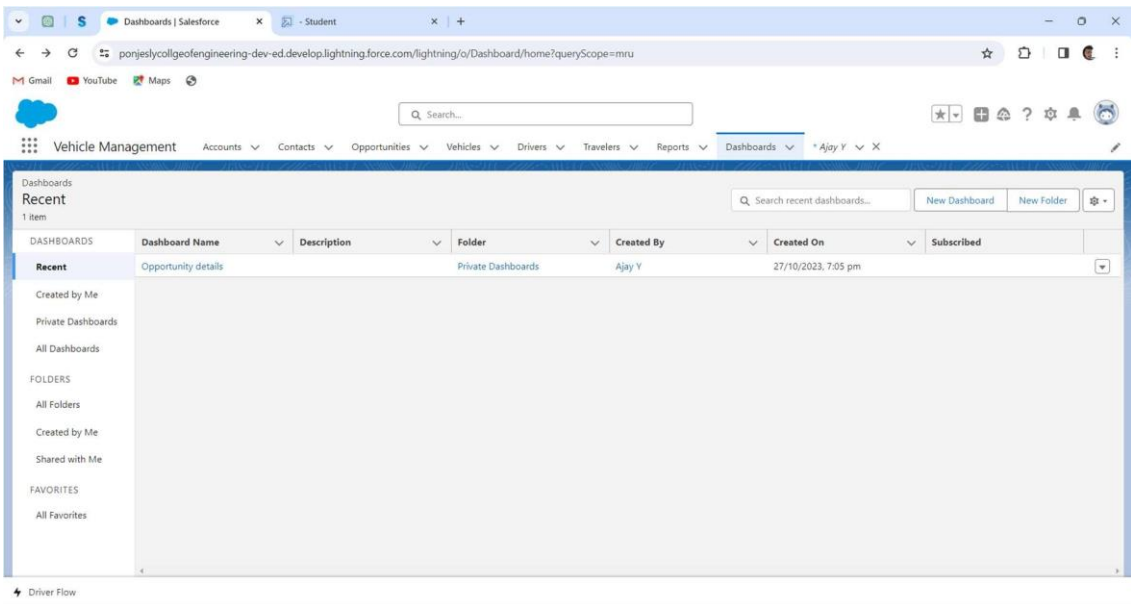


# Step 9: Report and Dashboard

## Report

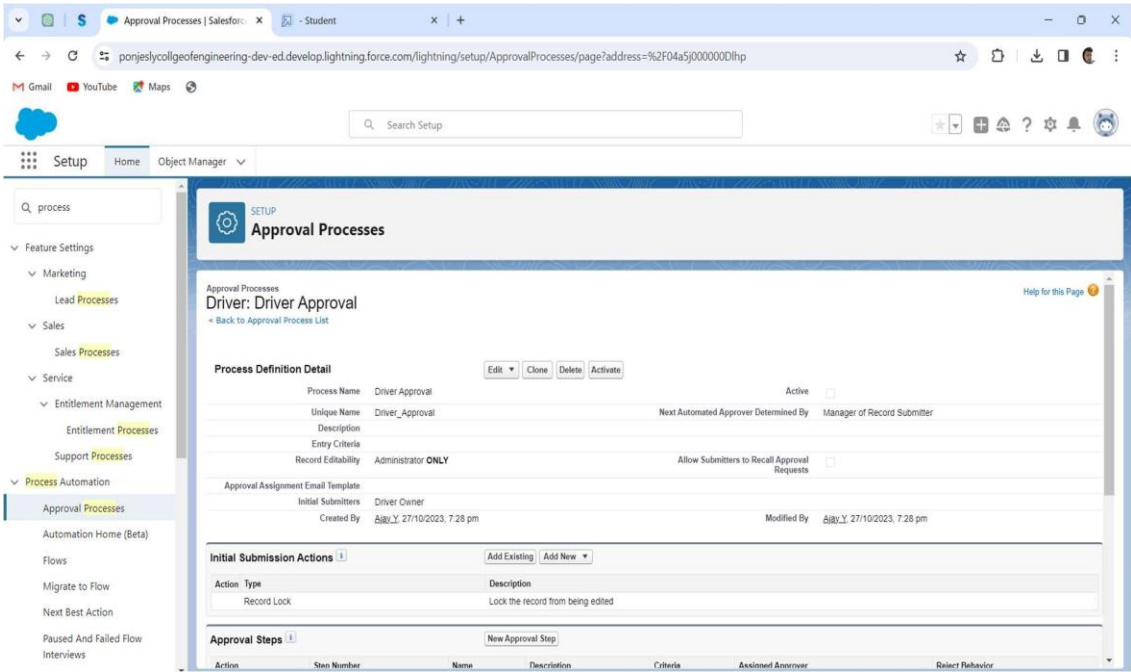


## Dashboard



# Step 10: Approval Process

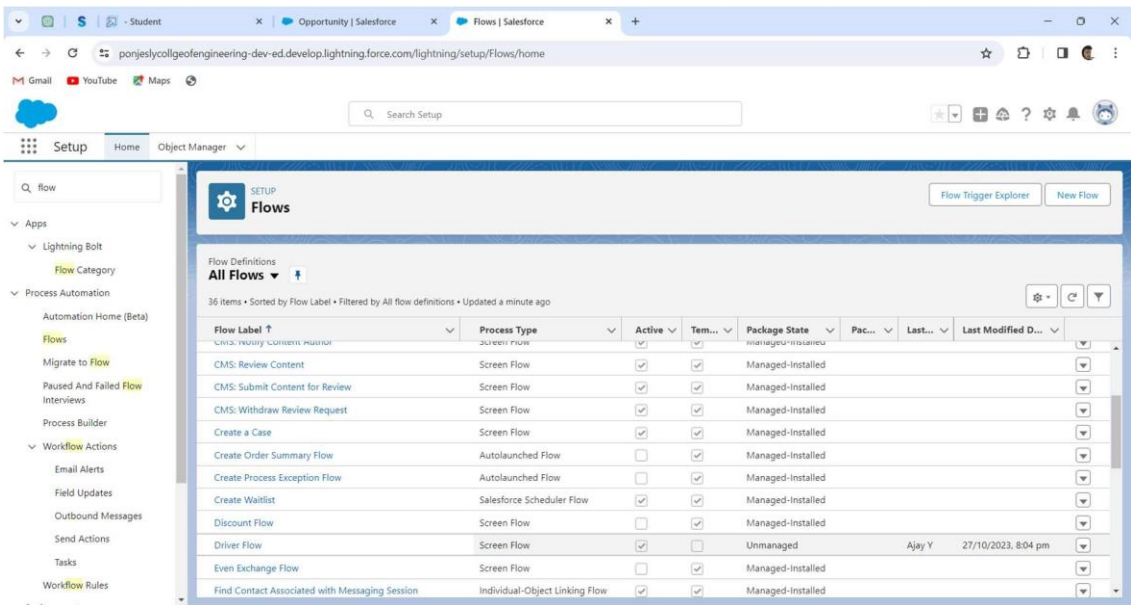
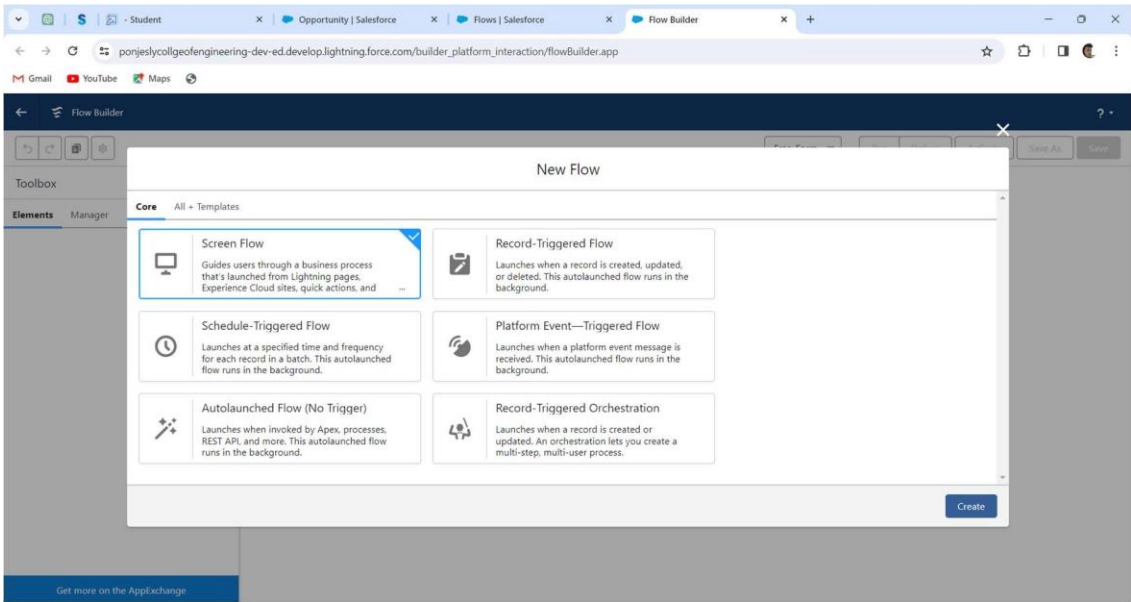
## Creation of approval Process





# Step 11: Screen Flow

## Creation of Screen flow



# Step 12: App Page

## App Page Setting

