

# NAAN MUDHALVAN

## SALESFORCE PROJECT REPORT

**COLLEGE : SCAD COLLEGE OF ENGINEERING AND TECHNOLOGY**

**PROJECT TITLE : VEHICLE MANAGEMENT SYSTEM USING SALESFORCE**

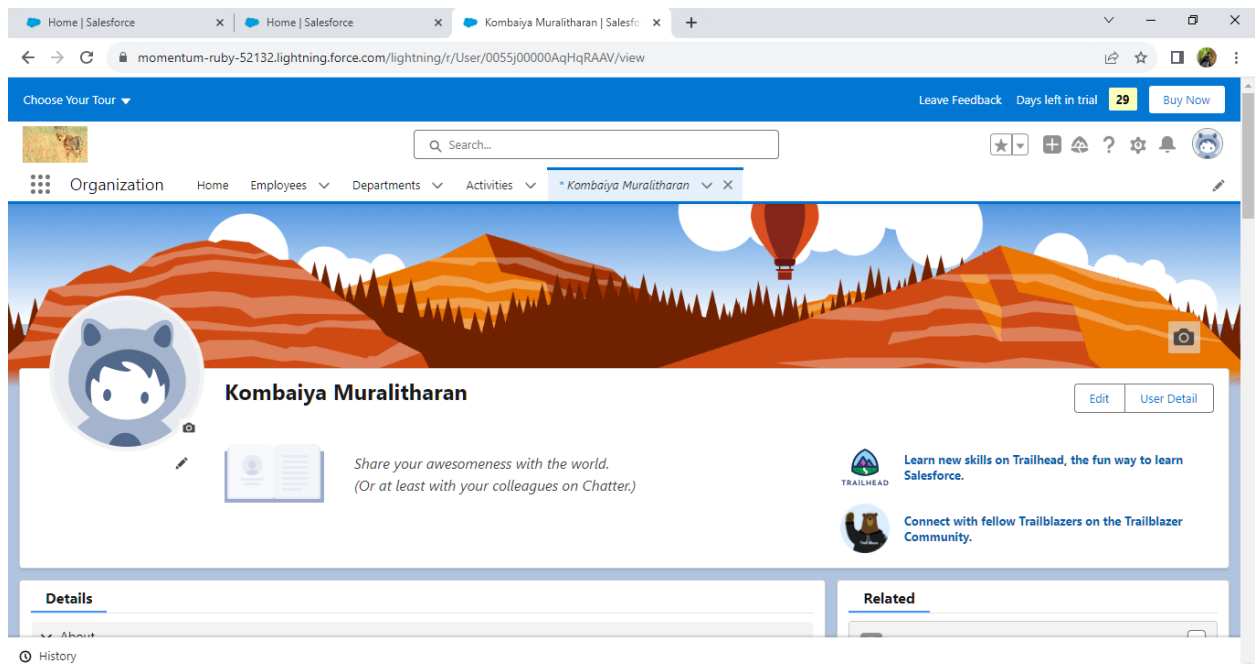
**BATCH : 14**

NAME	NM ID	REG. NO
SIVARAJAN .N	271EAFD6F8545A48057471333BB8AA02	952820114022
KOMBALIA MURALI THARAN .S	A8231B32A09D15697D449D3351E33E2D	952820114326
SURESH DHARMAPATHI .S	486368DFD8CCBB28F0B400EBA87BD396	952820114357
VIJAY SELVA .J	5CE49E2D64D536FAB434DF95A9D21F57	952820114361

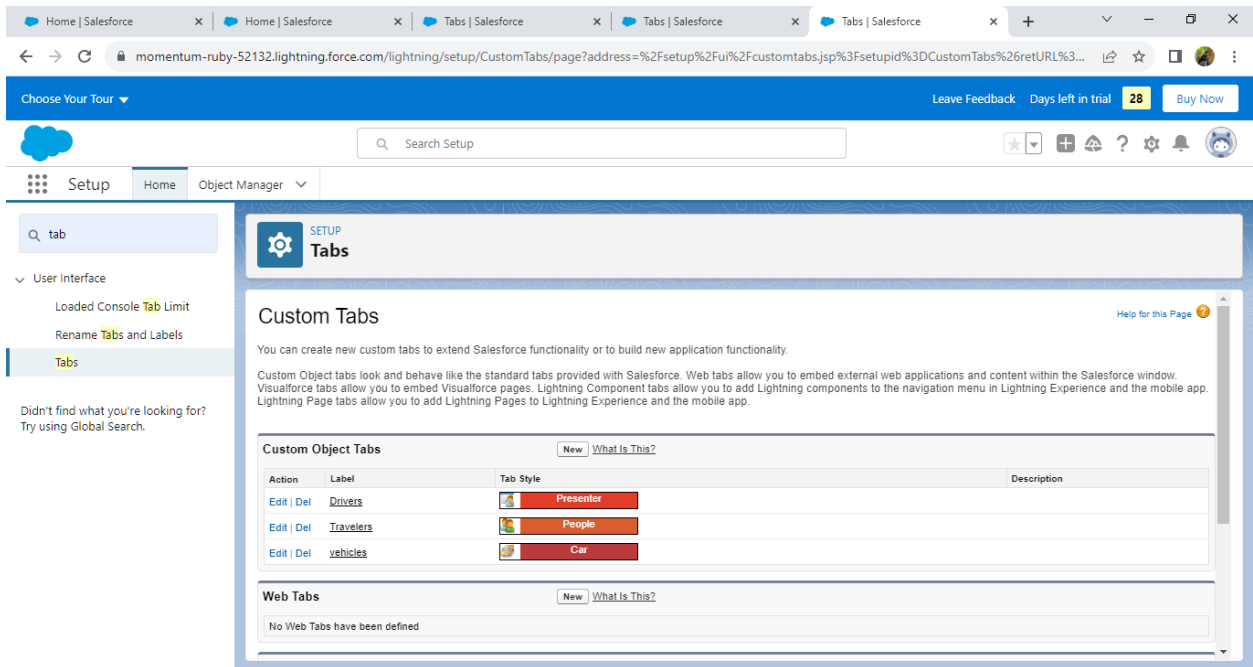
## **PROJECT FLOW :**

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

### **Milestone 1 : Creation Of Developer Account**



## Milestone 2 : Object Creation

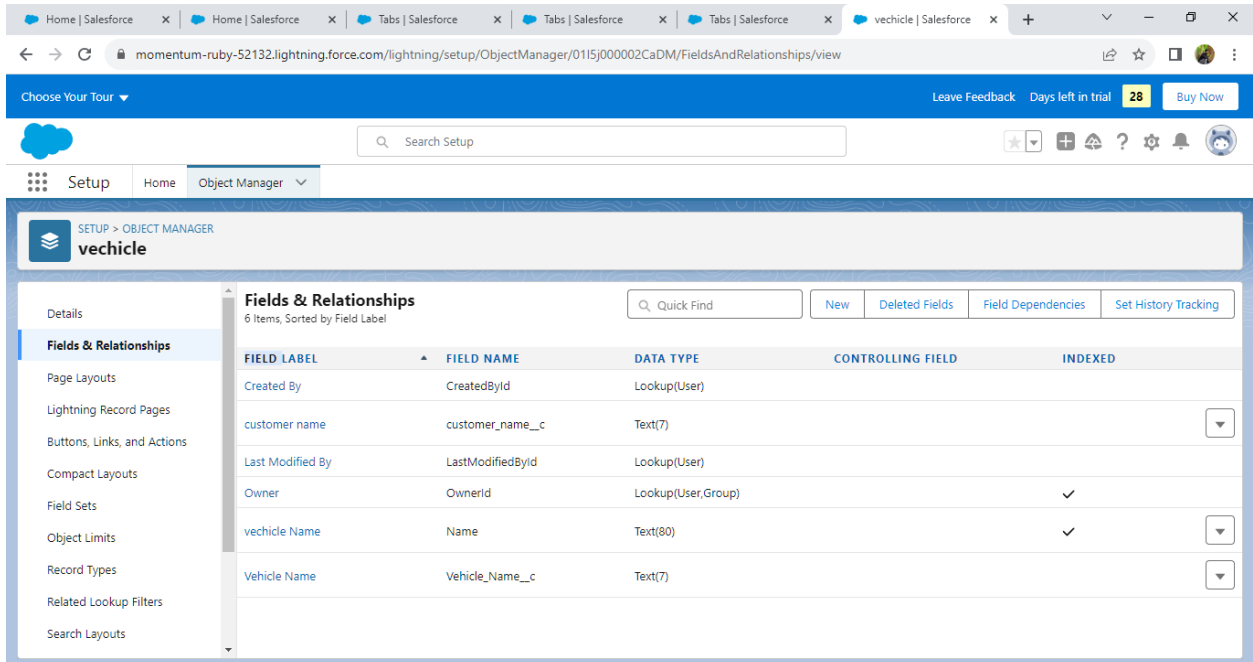


The screenshot shows the Salesforce Setup interface for Custom Tabs. The left sidebar contains a search bar with 'tab' entered and a list of navigation items: User Interface, Loaded Console Tab Limit, Rename Tabs and Labels, and Tabs (selected). The main content area is titled 'Custom Tabs' and includes a 'Help for this Page' link. Below the title, there is a descriptive paragraph about custom tabs. The 'Custom Object Tabs' section contains a table with three rows: 'Drivers' (Presenter style), 'Travelers' (People style), and 'vehicles' (Car style). The 'Web Tabs' section below it states 'No Web Tabs have been defined'.

Action	Label	Tab Style	Description
<a href="#">Edit</a>   <a href="#">Del</a>	Drivers	Presenter	
<a href="#">Edit</a>   <a href="#">Del</a>	Travelers	People	
<a href="#">Edit</a>   <a href="#">Del</a>	vehicles	Car	

Action	Label	Tab Style	Description
No Web Tabs have been defined			

## Milestone 3 : Fields & Relationships



The screenshot shows the Salesforce Setup interface for the 'vehicle' object's Fields & Relationships. The left sidebar contains a search bar with 'Quick Find' and a list of navigation items: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Fields & Relationships' and includes a 'Quick Find' search bar and buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. Below this, there is a table with five columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table contains six rows of field information.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
customer name	customer_name__c	Text(7)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
vehicle Name	Name	Text(80)		✓
Vehicle Name	Vehicle_Name__c	Text(7)		

## Milestone 4 : Page Layout

The screenshot shows the Salesforce Setup interface for configuring the Opportunity page layout. The left sidebar lists various setup options, with 'Page Layouts' selected. The main area displays the 'Opportunity' object with a list of fields and their associated page layouts. The 'Fields' section is expanded, showing a list of fields and their associated page layouts. The 'Fields' section is further divided into 'Fields' and 'Page Layouts'.

Fields	Page Layouts
Budget Confirmed	Blank Space
Close Date	Contract
Expected Revenue	Forecast Category
Lead Source	Opportunity Owner
Opportunity Name	Probability (%)
Stage	Route

The 'Page Layouts' section shows a list of page layouts for the Opportunity object, including 'Sample Text', 'Expected Revenue', 'Opportunity Owner', 'Close Date', 'Stage', 'Probability (%)', and 'Amount'.

## Milestone 5 : Lightning App

The screenshot shows the Salesforce Setup interface for configuring Roles. The left sidebar lists various setup options, with 'Roles' selected. The main area displays the 'Roles' configuration page for the 'Vehicle Manager' role. The page includes a list of users assigned to the role, a 'Role Detail' section, and a 'Users in Vehicle Manager Role' section.

**Role Detail**

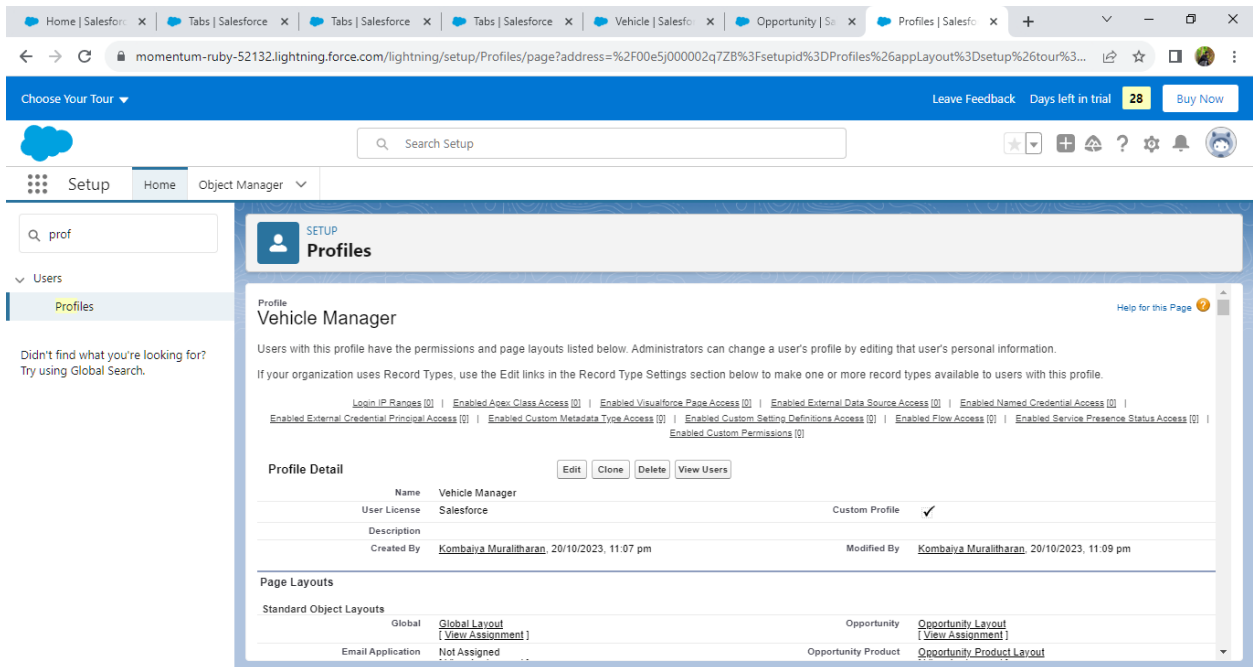
Label	Vehicle Manager	Role Name	Vehicle_Manager
This role reports to	None	Role Name as displayed on reports	
Modified By	Kombaiya Muralitharan, 20/10/2023, 11:14 pm	Sharing Groups	Role, Role and Subordinates
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases		

**Users in Vehicle Manager Role**

Assign Users to Role New User

Users in Vehicle Manager Role Help

## Milestone 6 : Profile



The screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a search bar with 'prof' and a list of navigation items: Users, Profiles, and a message 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Profiles' and shows the 'Vehicle Manager' profile. It includes a description, a list of enabled permissions (Login IP Ranges, Apex Class Access, Visualforce Page Access, External Data Source Access, Named Credential Access, External Credential Principal Access, Custom Metadata Type Access, Custom Setting Definitions Access, Flow Access, Service Presence Status Access, Custom Permissions), and a 'Profile Detail' table. The 'Profile Detail' table shows the profile name 'Vehicle Manager', user license 'Salesforce', description, created by 'Kombaiya Muralitharan', and modified by 'Kombaiya Muralitharan'. Below the table is a 'Page Layouts' section showing standard object layouts for Global, Opportunity, and Email Application.

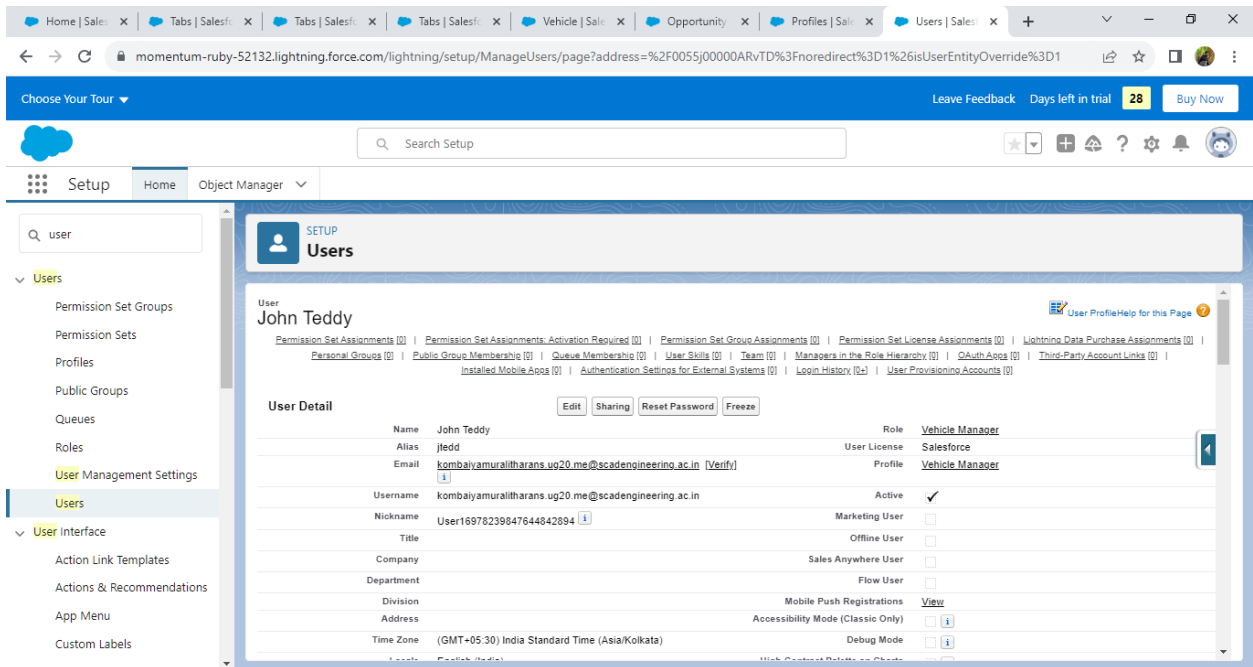
**Profile Detail**

Name	Vehicle Manager
User License	Salesforce
Description	
Created By	Kombaiya Muralitharan, 20/10/2023, 11:07 pm
Modified By	Kombaiya Muralitharan, 20/10/2023, 11:09 pm

**Page Layouts**

Standard Object Layouts	Global	Opportunity	Email Application
	Global Layout (View Assignment)	Opportunity Layout (View Assignment)	Not Assigned
		Opportunity Product Layout	

## Milestone 7 : Users



The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains a search bar with 'user' and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users, User Interface, Action Link Templates, Actions & Recommendations, App Menu, Custom Labels, and Profile Settings. The main content area is titled 'Users' and shows the 'John Teddy' user. It includes a list of enabled permissions (Permission Set Assignments, Activation Required, Permission Set Group Assignments, License Assignments, Lightning Data Purchase Assignments, Personal Groups, Public Group Membership, Queue Membership, User Skills, Team, Managers in the Role Hierarchy, OAuth App, Third-Party Account Links, Installed Mobile App, Authentication Settings for External Systems, Login History, User Provisioning Accounts) and a 'User Detail' table. The 'User Detail' table shows the user name 'John Teddy', alias 'Jtedd', email 'kombaiyamuralitharan.ug20.me@scadengineering.ac.in', username 'kombaiyamuralitharan.ug20.me@scadengineering.ac.in', nickname 'User16978239847644842894', title, company, department, division, address, time zone '(GMT+05:30) India Standard Time (Asia/Kolkata)', and role 'Vehicle Manager'. The 'User Detail' table also shows the user is active, has a marketing user role, and is a sales anywhere user.

**User Detail**

Name	John Teddy
Alias	Jtedd
Email	kombaiyamuralitharan.ug20.me@scadengineering.ac.in (Verify)
Username	kombaiyamuralitharan.ug20.me@scadengineering.ac.in
Nickname	User16978239847644842894
Title	
Company	
Department	
Division	
Address	
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)
Role	Vehicle Manager

## Milestone 8 : User Adoption

Home | Sales | Tabs | Sales | Tabs | Sales | Vehicle | Opportunities | Profiles | MAHENDRA | Home | Sales | +

momentum-ruby-52132.lightning.force.com/lightning/r/Vehicle\_c/a085j00000HUNegAAH/view

Choose Your Tour | Leave Feedback | Days left in trial 28 | Buy Now

Vehicle Management | Accounts | Contacts | Opportunities | Vehicles | Drivers | Travelers | Reports | Dashboards

Vehicle MAHENDRA THAR

New Contact | Edit | New Opportunity

Related

Details

vehicle NameMAHENDRA THAR

Vehicle NoTS 96 CF 9405

Two Wheeler

Four Wheeler20

Vehicle Type20

Created ByKombaiya Muralitharan: 20/10/2023, 11:46 pm

Last Modified ByKombaiya Muralitharan: 20/10/2023, 11:46 pm

OwnerKombaiya Muralitharan

## Milestone 9 : Reports

Home | Sales | Tabs | Sales | Tabs | Sales | Vehicle | Opportunities | Profiles | Report Builder | Home | Sales | +

momentum-ruby-52132.lightning.force.com/lightning/r/Report/0005j000009XMeWEAW/edit

Choose Your Tour | Leave Feedback | Days left in trial 28 | Buy Now

Vehicle Management | Accounts | Contacts | Opportunities | Vehicles | Drivers | Travelers | Reports | Dashboards

REPORT

New Opportunities Report

Opportunities

↺ ↻ ↻ Add Chart Save & Run Save Close Run

Outline

Filters 1

Previewing a limited number of records. Run the report to see everything. Update Preview Automatically

Groups

GROUP ROWS

Add group...

Journey Start Date

Journey End Date

GROUP COLUMNS

Add group...

Columns

Add column...

Opportunity Owner

Opportunity Name

Journey Start Date

Journey End Date

Opportunity Owner

Opportunity Name

Row Counts

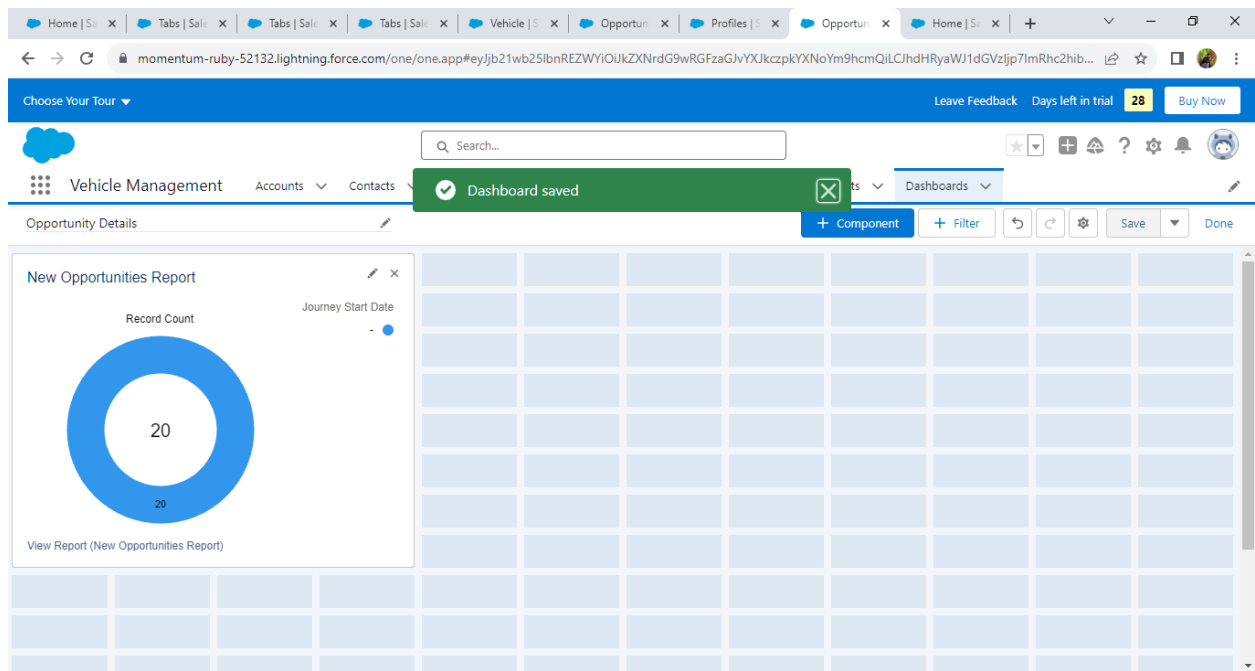
Detail Rows

Subtotals

Grand Total

- (20)	- (20)	Kombaiya Muralitharan	salesforce.com - 1,000 Widgets (Sample)
		Kombaiya Muralitharan	Acme - 1100 Widgets (Sample)
		Kombaiya Muralitharan	Acme - 80 Widgets (Sample)
		Kombaiya Muralitharan	Acme - 1250 Widgets (Sample)
		Kombaiya Muralitharan	Global Media - 180 Widgets (Sample)
		Kombaiya Muralitharan	Global Media - 1750 Widgets (Sample)
		Kombaiya Muralitharan	salesforce.com - 200 Widgets (Sample)
		Kombaiya Muralitharan	salesforce.com - 210 Widgets (Sample)
		Kombaiya Muralitharan	Acme - 150 Widgets (Sample)
		Kombaiya Muralitharan	Global Media - 140 Widgets (Sample)
		Kombaiya Muralitharan	Global Media - 400 Widgets (Sample)
		Kombaiya Muralitharan	salesforce.com - 320 Widgets (Sample)

## Milestone 10 : Dashboards



## Milestone 11 : Approval Process

The screenshot shows the Salesforce Flow Builder interface. The top navigation bar includes tabs for 'Home', 'Sal...', 'Vehicle', 'Opportun...', 'Profiles', 'Dashbo...', 'Flows', and 'Flow B...'. The main content area is titled 'New Screen' and displays a flow diagram. The flow starts with a 'Flow Label' and then branches into two paths: 'Driver Name' and 'Licence No'. The 'Driver Name' path leads to a 'Number' component, which is highlighted with a blue border. The 'Licence No' path leads to a 'Mobile No' component. The 'Number' component has a 'Label' field set to 'Mobile No' and an 'API Name' field set to 'Mobile\_No'. The 'Mobile No' component has a 'Label' field set to 'Mobile No' and an 'API Name' field set to 'Mobile\_No'. The 'Number' component also has a 'Require' checkbox and a 'Default Value' field. The 'Mobile No' component has a 'Default Value' field and a 'Decimal Places' field. The interface includes a 'Components' sidebar on the left with a search bar and a list of components: 'Long Text Area', 'Lookup', 'Multi-Select Picklist', 'Name', 'Number', 'Password', and 'Phone'. The 'Number' component is selected. The 'Mobile No' component is also visible in the flow diagram. The bottom of the interface has a 'Cancel' button and a 'Done' button.

## Milestone 12 : Screen Flow

