

**NAAN MUDHALVAN**

**SALESFORCE DEVELOPER PROJECT REPORT**

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

**COLLEGE: PONJESLY COLLEGE OF ENGINEERING**

DONE BY:

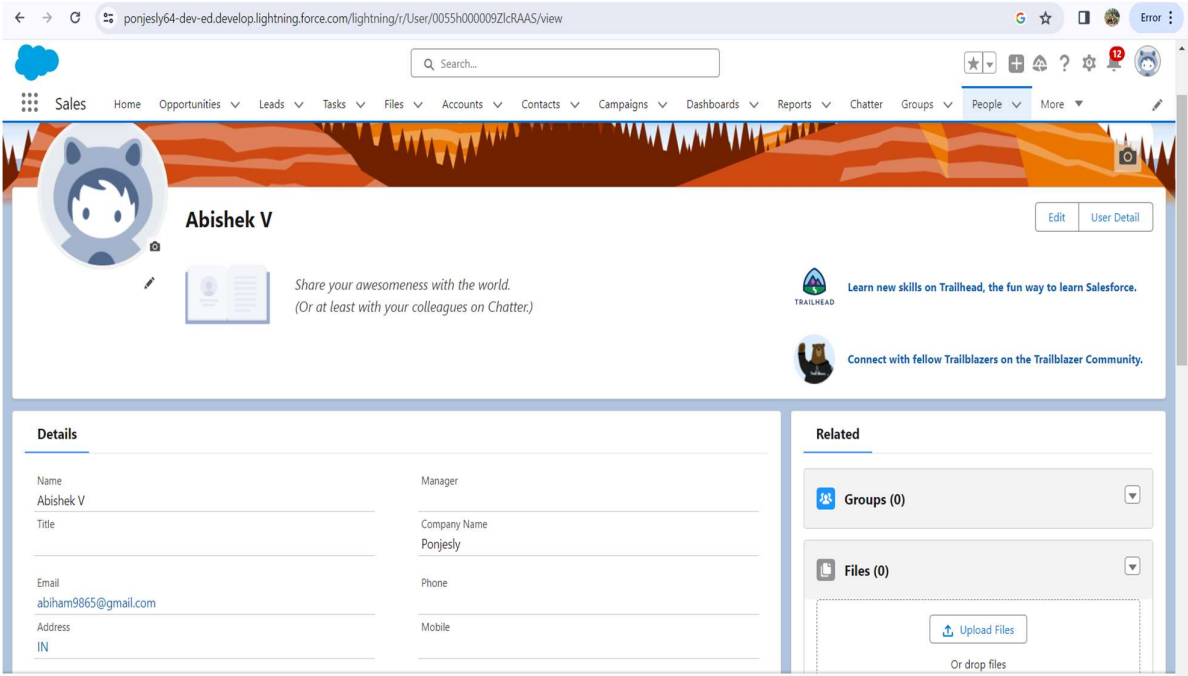
ABISHEK.V

REG NO: 961820114006

NM ID: 7EF82405523966C8892469A046FC1615

# Step 1: Creation Salesforce Org

## Creating Developer Account



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

Vehicle

Object Manager | SalesforceStudent

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

GmailYouTubeMaps

Search Setup

SetupHomeObject Manager

Object Manager

1 item. Sorted by Label

vehicleSchema BuilderCreate

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Vehicle	Vehicle__c	Custom Object		20/10/2023	✓

Traveler

Object Manager | SalesforceStudent

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

GmailYouTubeMaps

Search Setup

SetupHomeObject Manager

Object Manager

1 item. Sorted by Label

travelerSchema BuilderCreate

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Traveler	Traveler__c	Custom Object		20/10/2023	✓

Microsoft Store

# 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 Items, Sorted by Label

drive

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 | Salesforce

- Student

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

Gmail YouTube Maps

Search Setup

Setup Home Object Manager

Vehicle

Details

Fields & Relationships

19 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set 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 | Salesforce

- Student

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

Gmail YouTube Maps

Search Setup

Setup Home Object Manager

Vehicle

Details

Fields & Relationships

19 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set 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

ponjeslycollegeofengineering-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j0000037FqQ/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

Q 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

ponjeslycollegeofengineering-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j0000037FqQ/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

Q 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

Gmail

YouTube

Maps

Search Setup

Setup

Home

Object 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

New

Deleted Fields

Field Dependencies

Set 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	IQScore	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

Gmail

YouTube

Maps

Search Setup

Setup

Home

Object 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

New

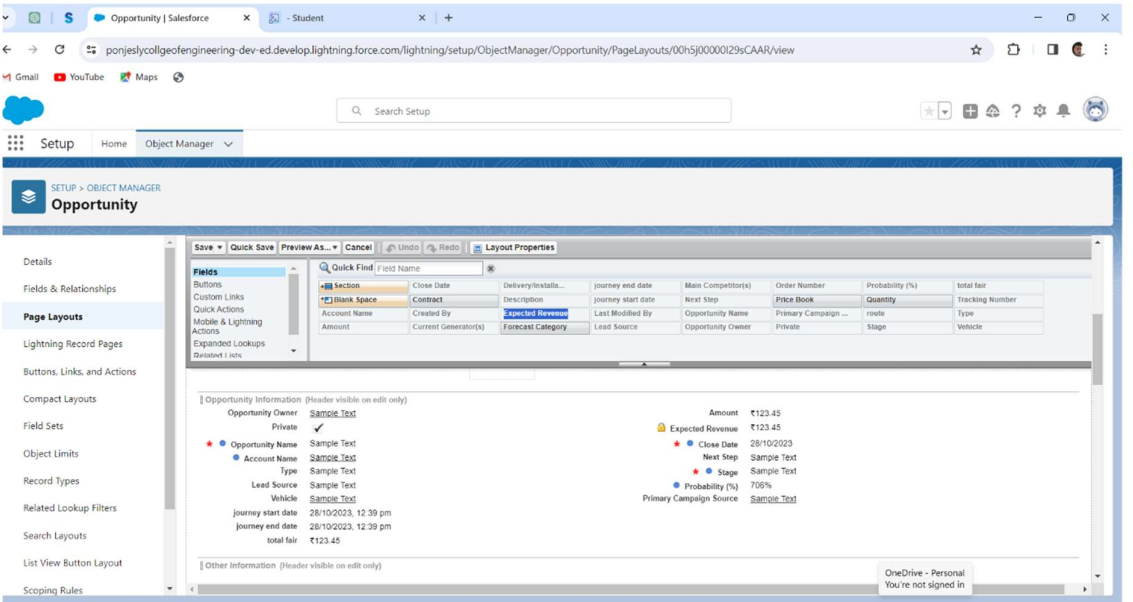
Deleted Fields

Field Dependencies

Set History Tracking

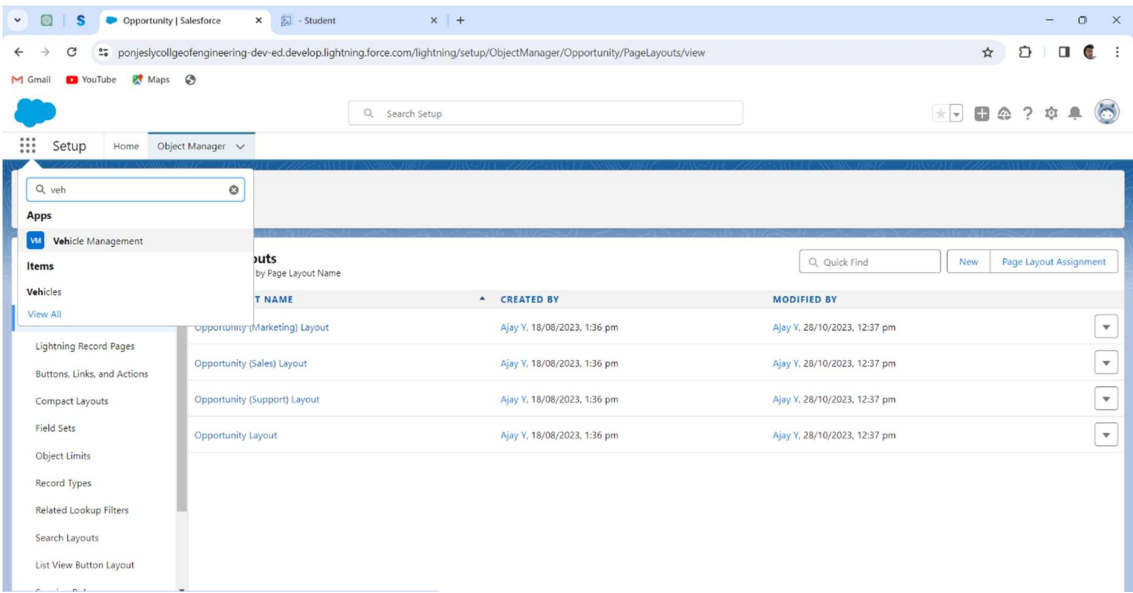
Private	IsPrivate	Checkbox	
Probability (%)	Probability	Percent(3, 0)	
Quantity	TotalOpportunityQuantity	Number(16, 2)	
route	route__c	Long Text Area(32768)	
Stage	StageName	Picklist	
total fair	total_fair__c	Currency(18, 0)	
Tracking Number	TrackingNumber__c	Text(12)	
Type	Type	Picklist	
Vehicle	Vehicle__c	Lookup(Vehicle)	✓

## Step 4: Page layout setup



## Step 5: Lightning app

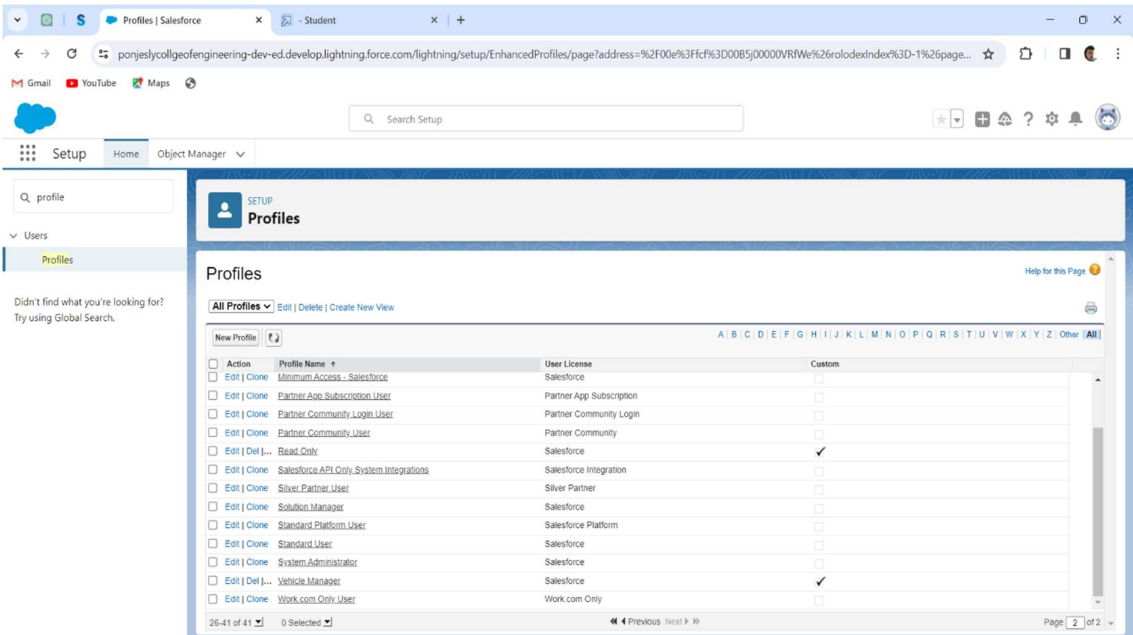
### Create the vehicle management app



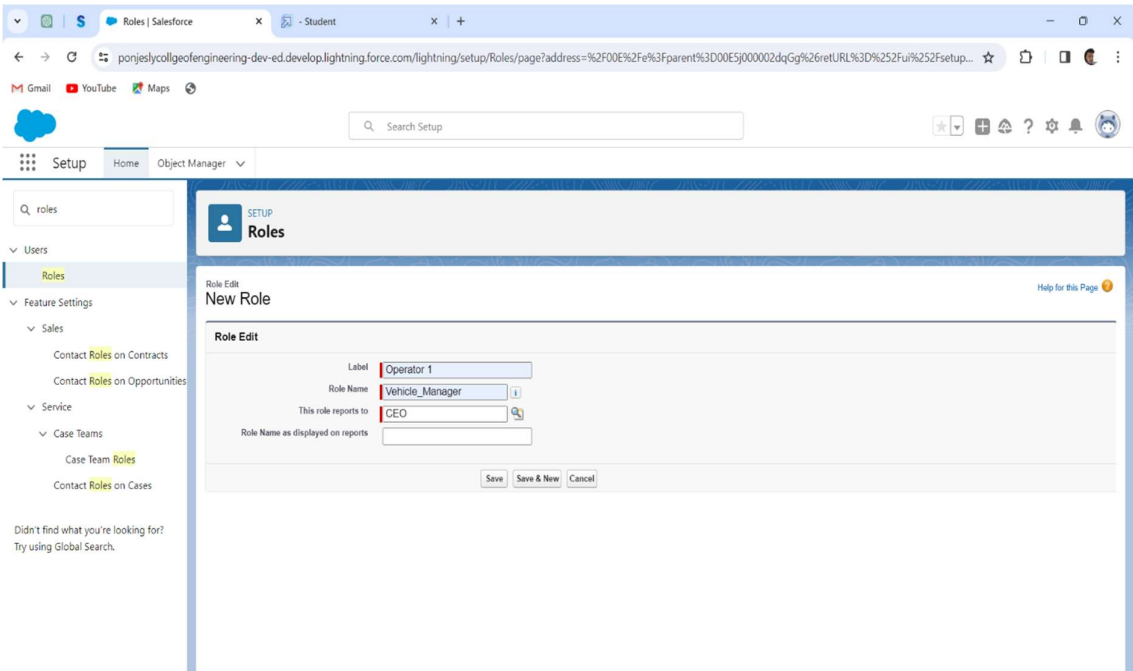


# Step 6: Profile

## Creating a profile



## Set up roles for Operator 1



## Set up role for Operator 2

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'roles' entered. The 'Roles' link is highlighted in the sidebar. The main content area is titled 'New Role' and contains a 'Role Edit' form. The form fields are: Label (Operator 2), Role Name (Vehicle\_Manager), This role reports to (CEO), and Role Name as displayed on reports (empty). At the bottom of the form are buttons for 'Save', 'Save & New', and 'Cancel'.

## Step 7: Users

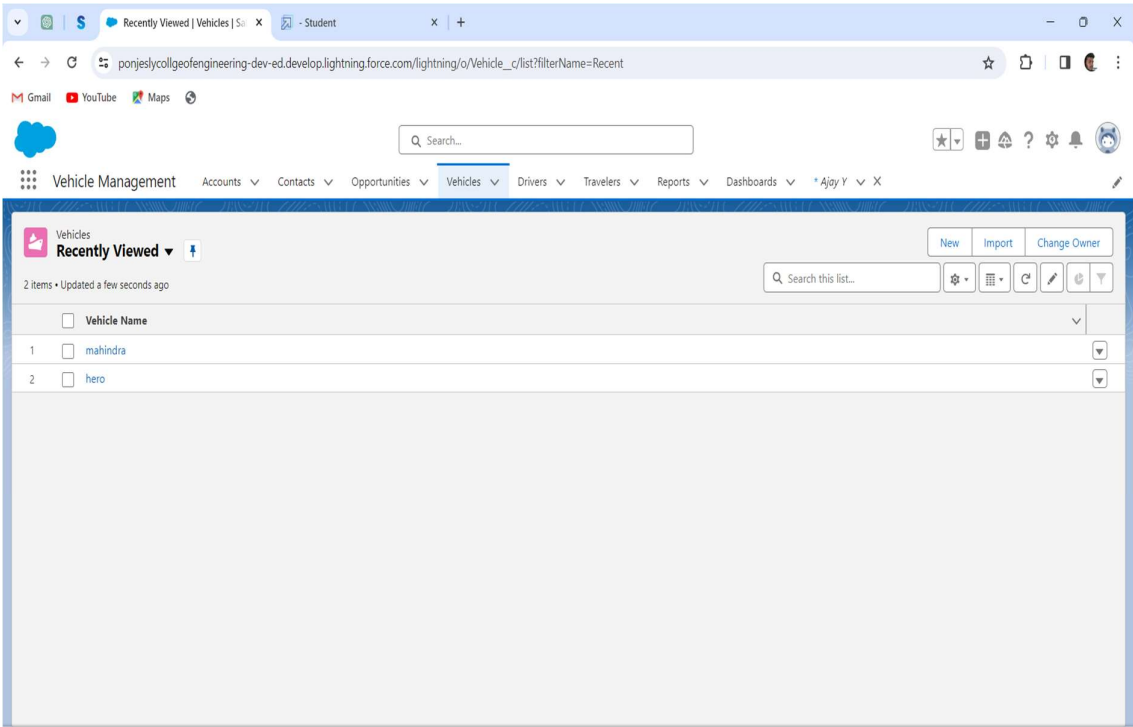
### Creating a user for operator 1 and operator 2

The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar has a search bar with 'user' entered. The 'Users' link is highlighted in the sidebar. The main content area is titled 'All Users' and contains a table of users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users, including '1\_operator', '2\_operator', 'Chatter\_Expert', 'Teddy\_John', 'User\_Integration', 'User\_Security', and 'Y.Alex'. The 'Active' column shows checkboxes for each user, all of which are checked. The 'Profile' column shows the profile assigned to each user.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	1_operator	o1	ajav9515@gmail.com	Operator 1	<input checked="" type="checkbox"/>	Salesforce API Only System Integrations
<input type="checkbox"/> Edit	2_operator	o2	ajav755@gmail.com	Operator 2	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	Chatter_Expert	Chatter	chatter00x500000chmdaefz9hdcnviyox@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Teddy_John	tedd	vajav3615@gmail.com	Vehicle Manager	<input checked="" type="checkbox"/>	Vehicle Manager
<input type="checkbox"/> Edit	User_Integration	integ	integration@00x500000chmdaefz9hdcnviyox@chatter.salesforce.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00x500000chmdaefz9hdcnviyox@chatter.salesforce.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/> Edit	Y.Alex	AY	ajav3@gmail.com		<input checked="" type="checkbox"/>	System Administrator

# 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		
	vj MAHINDRA		
classic no	746453467		
colour	black		
body type	metal		
vehicle includes	fire extinguisher;first aid kit;multi;charger kit;stepney;toolkit;tracing kit		

Vehicle Management

Accounts Contacts Opportunities Vehicles Drivers Travelers Reports Dashboards \*Ajay Y X

Vehicle mahindra

New Contact Edit New Opportunity

fire extinguisher;first aid kit;multi-charger kit;stepney;toolkit;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

Vehicle ManagementAccountsContactsOpportunitiesVehiclesDriversTravelersReportsDashboardsAjay Y X

Vehiclehero

New ContactEditNew Opportunity

RelatedDetails

Vehicle Namehero

Vehicle noth76d5464

vehicletype1.2 wheelers

2WHEELERS

ij HERO

4 wheelers

chassis no457437

colouryellow

body typemetal

vehicle includes toolkit

OwnerAjay Y

Driver Flow

Vehicle ManagementAccountsContactsOpportunitiesVehiclesDriversTravelersReportsDashboardsAjay Y X

Vehiclehero

New ContactEditNew Opportunity

vehicle includes toolkit

conditiongood

mileage35

seats2

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

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

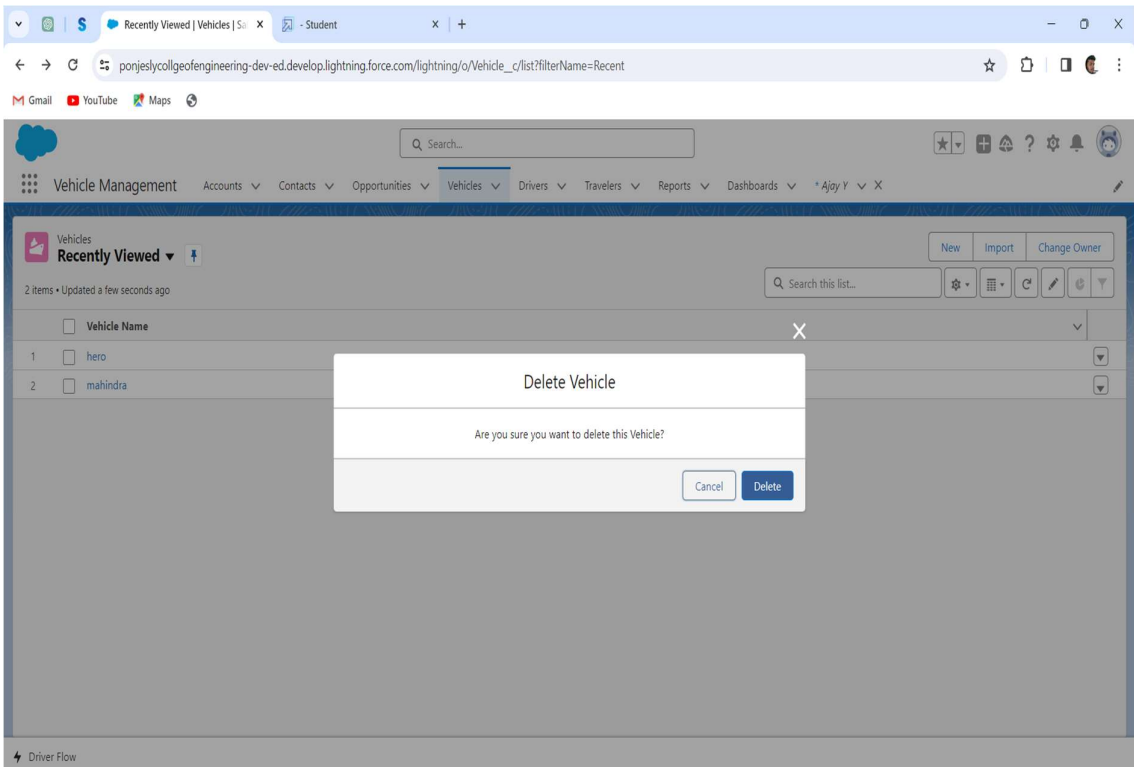
total fair

route

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

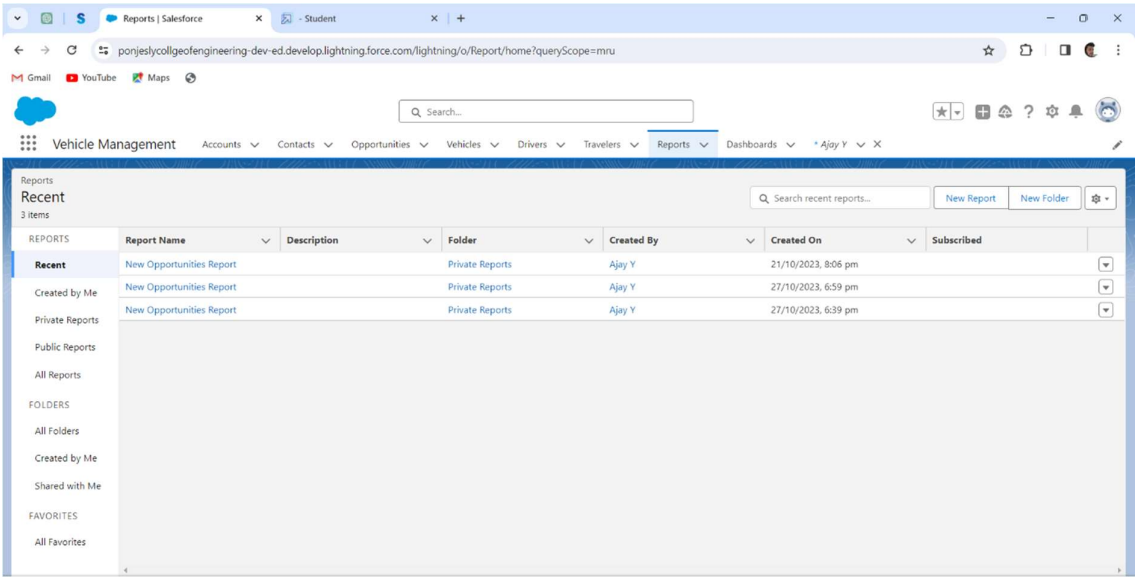
Last Modified ByAjay Y, 27/10/2023, 5:28 pm

# Delete Record

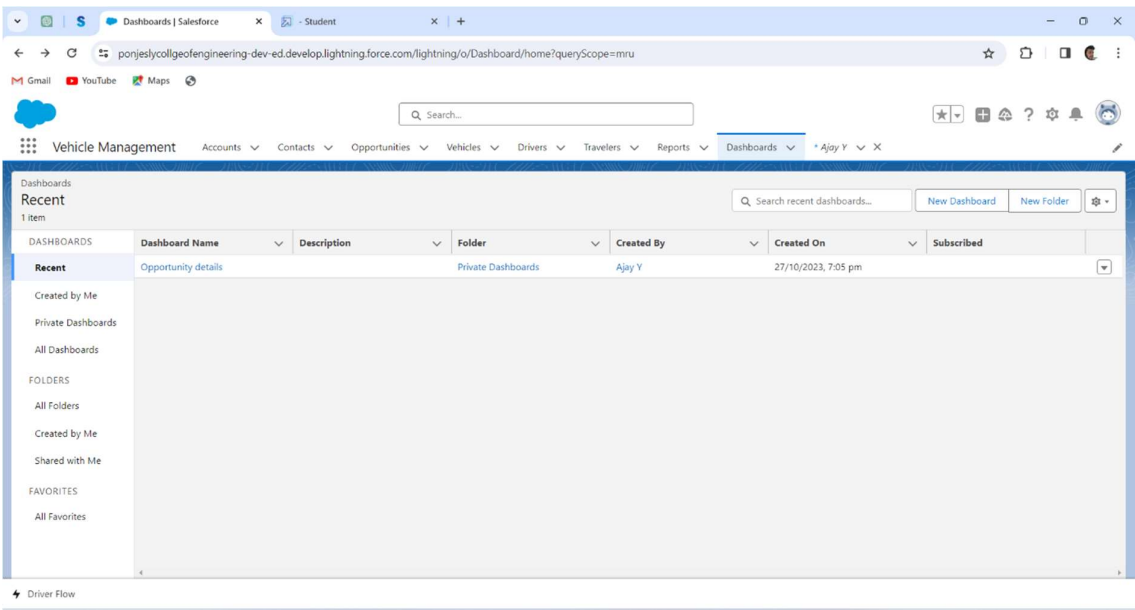


# Step 9: Report and Dashboard

## Report

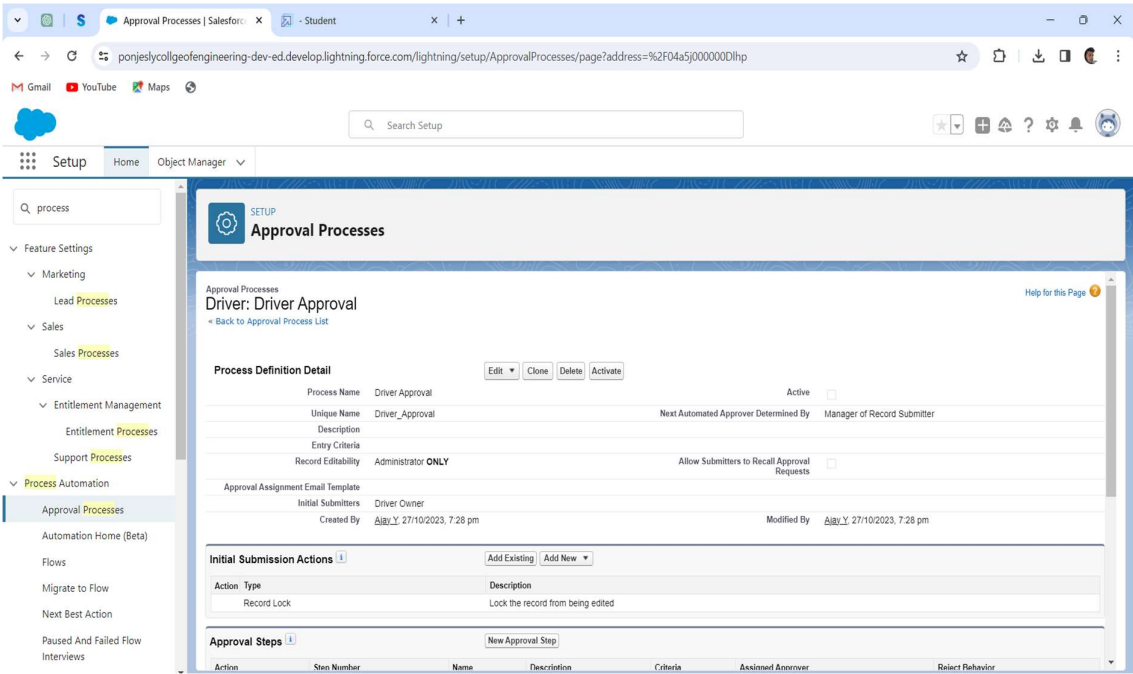


## Dashboard



# Step 10: Approval Process

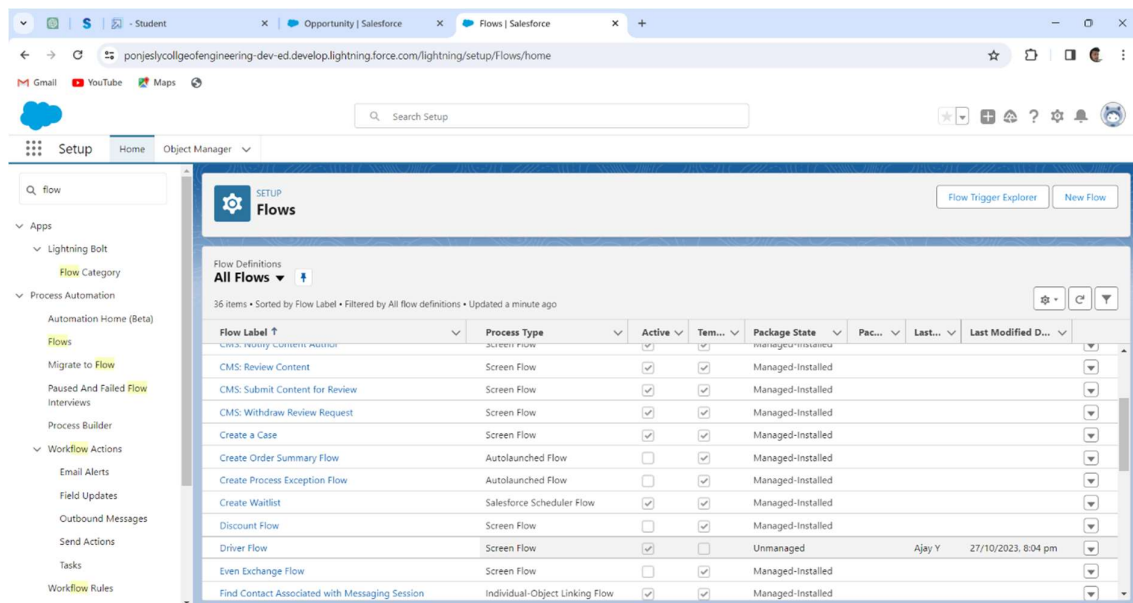
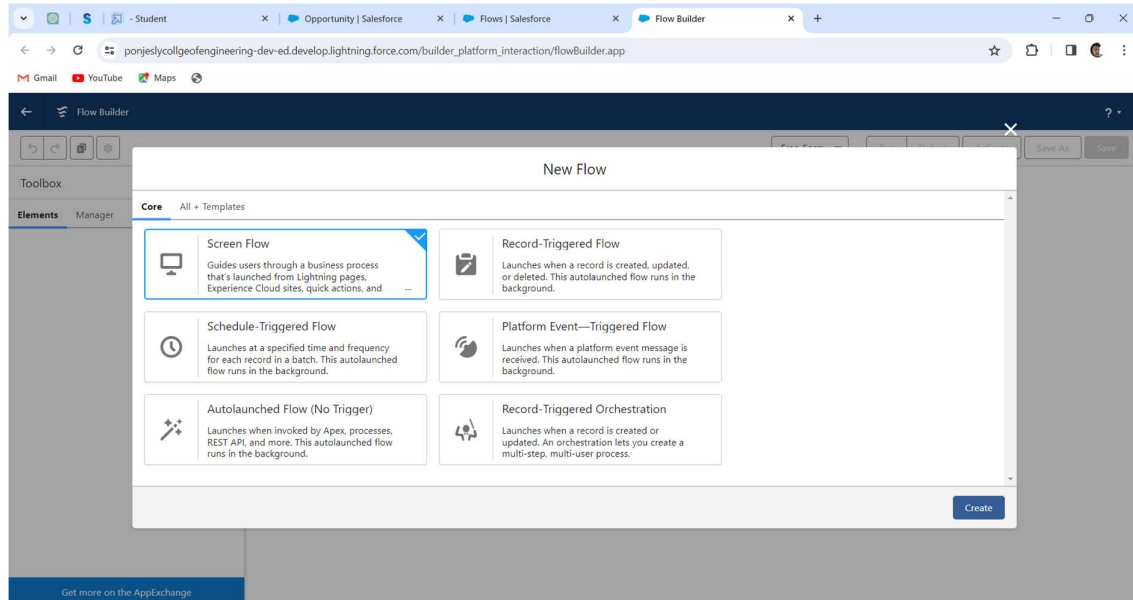
## Creation of approval Process





## Step 11: Screen Flow

### Creation of Screen flow



ponjeslycollgeofengineering-dev-ed.develop.lightning.force.com/builder\_platform\_interaction/flowBuilder.app

Gmail YouTube Maps

Flow Builder

Select Elements

Auto-Layout

Run

Debug

Activate

Save As

Save

Screen Flow  
Start

Driver info  
Screen

Create Records

End

New Create Records

\*Label

\*API Name

Description

How Many Records to Create

One

Multiple

How to Set the Record Fields

Use all values from a record

Use separate resources, and literal values

Create a Record from These Values

\* Record

Search records...

Make sure that ID is blank. After the flow creates the records, ID is set to match the record that was created.

# Step 12: App Page

## App Page Setting

