

# PROJECT REPORT ON VEHICLE MANAGEMENT SYSTEM USING SALESFORCE

## 1.CREATING A DEVELOPER ACCOUNT:

- ❖ Go to [developers.salesforce.com/](https://developers.salesforce.com/)
- ❖ Click on sign up.
- ❖ On the sign up form, enter the following details :
- ❖ First name & Last name : BAGADI and SUPRAJA
- ❖ Email : [suprabagadi76@gmail.com](mailto:suprabagadi76@gmail.com)
- ❖ Role : SALESFORCE DEVELOPER
- ❖ Company : College Name - GAYATRI DEGREE COLLEGE – TIRUPATI
- ❖ County : India
- ❖ Postal Code : pin code - 517505
- ❖ Username : [supraja123@gmail.com](mailto:supraja123@gmail.com)

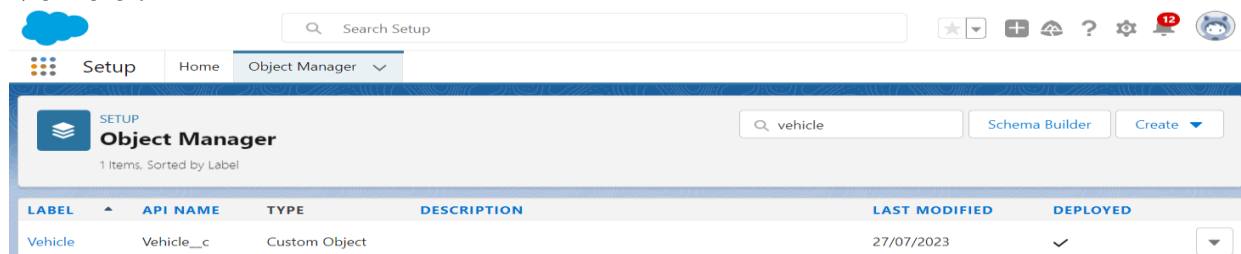
## 2.CREATE OBJECTS:

Salesforce objects are database tables that permit you to store data that is specific to an organization. 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.

➡ Standard Objects : Account, Contact, Opportunity.

➡ Custom objects : Vehicle, Driver, Traveler.

→ Vehicle :



## → Driver :

The screenshot shows the Salesforce Object Manager interface. At the top, there's a search bar with 'Search Setup'. Below it, the 'Setup' menu is open, showing 'Home' and 'Object Manager'. The 'Object Manager' page has a search bar with 'driver' entered. Below the search bar, there's a table with columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The table contains one row for the 'Driver' object, which is a Custom Object, last modified on 26/07/2023, and is deployed.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Driver	Driver__c	Custom Object		26/07/2023	✓

## → Traveler :

The screenshot shows the Salesforce Object Manager interface. At the top, there's a search bar with 'Search Setup'. Below it, the 'Setup' menu is open, showing 'Home' and 'Object Manager'. The 'Object Manager' page has a search bar with 'traveler' entered. Below the search bar, there's a table with columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The table contains one row for the 'Traveler' object, which is a Custom Object, last modified on 26/07/2023, and is deployed.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Traveler	Traveler__c	Custom Object		26/07/2023	✓

## 3.FIELDS AND RELATIONSHIPS:

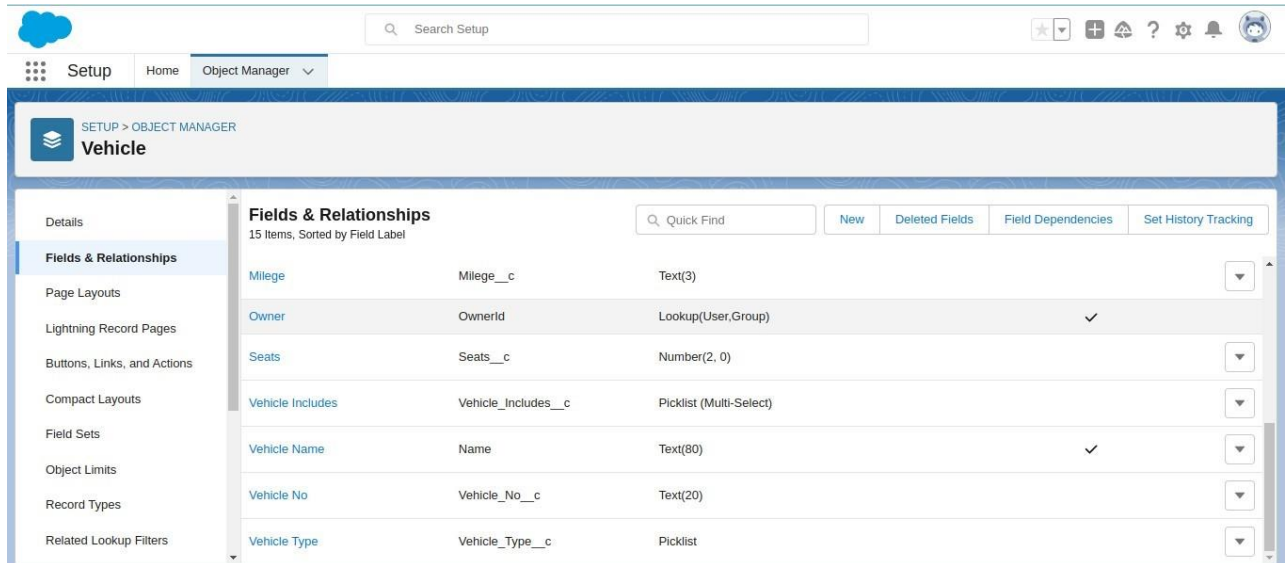
An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

## → Creation of Fields :

The screenshot shows the Salesforce Object Manager interface for the 'Vehicle' object. The left sidebar shows the 'Fields & Relationships' section. The main area displays a table with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table contains six rows of fields: 2WHEELERS, 4WHEELERS, Body Type, Chassic No, Colour, and Condition. Each field has a corresponding API name and data type.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
2WHEELERS	X2WHEELERS__c	Picklist	Vehicle Type	
4WHEELERS	X4WHEELERS__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		

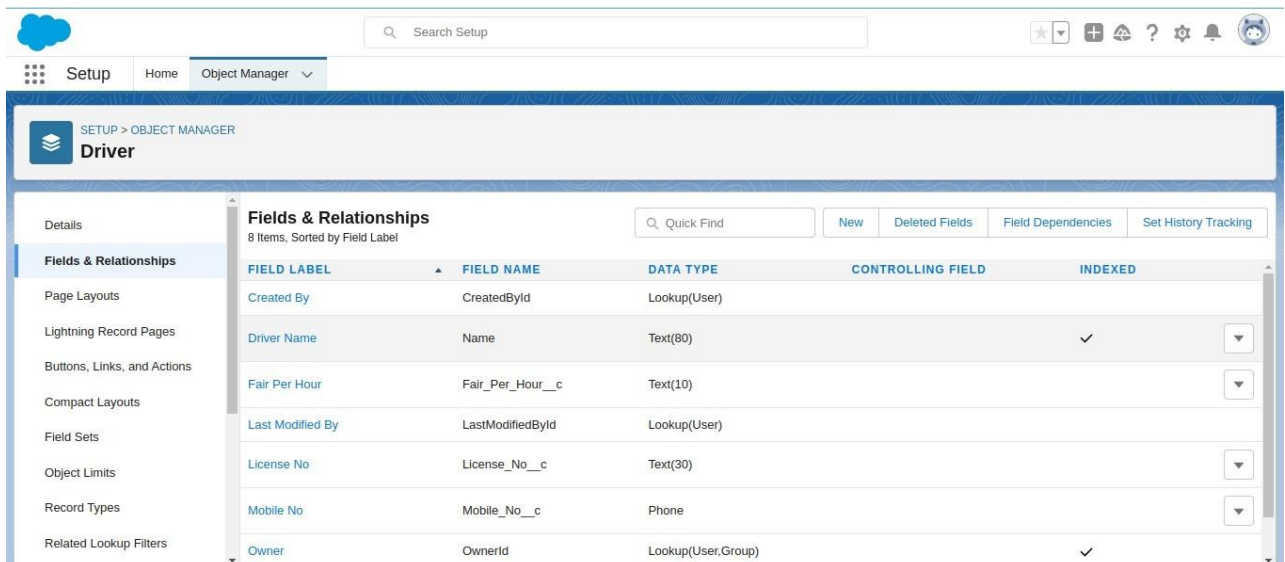
## → Fields in Vehicle Object :



The screenshot shows the Salesforce Setup interface for the Vehicle object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Vehicle' and 'Fields & Relationships' with a sub-header '15 Items, Sorted by Field Label'. A search bar 'Quick Find' and buttons 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking' are present. The table lists the following fields:

Field Label	Field Name	Data Type	Controlling Field	Indexed
Mileage	Mileage__c	Text(3)		
Owner	OwnerId	Lookup(User,Group)		✓
Seats	Seats__c	Number(2, 0)		
Vehicle Includes	Vehicle_Includes__c	Picklist (Multi-Select)		
Vehicle Name	Name	Text(80)		✓
Vehicle No	Vehicle_No__c	Text(20)		
Vehicle Type	Vehicle_Type__c	Picklist		

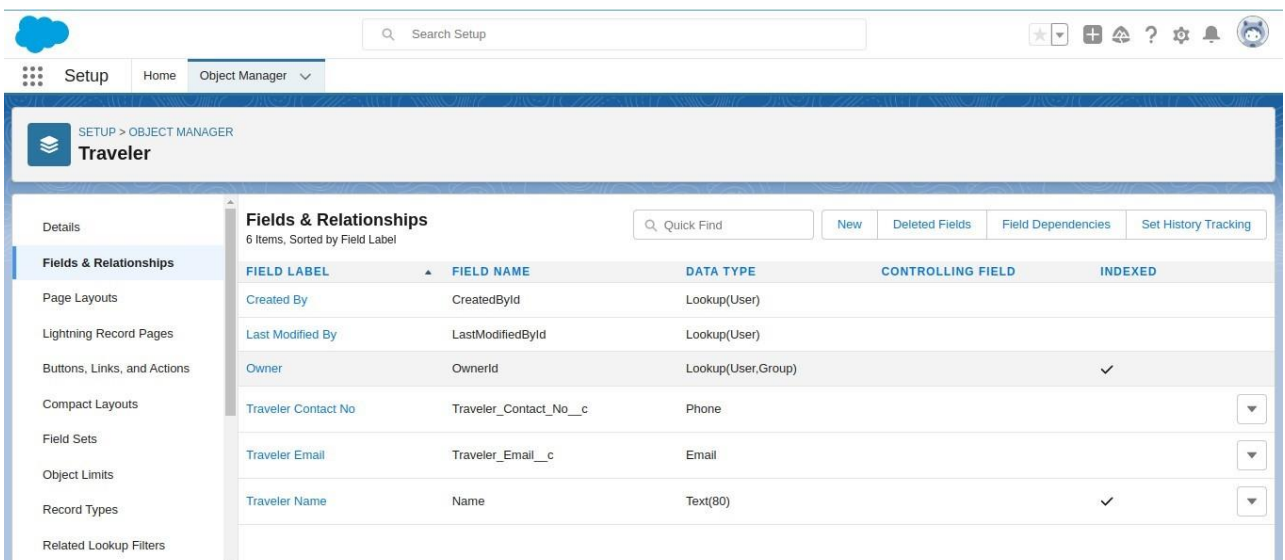
## → Fields In Driver Objects :



The screenshot shows the Salesforce Setup interface for the Driver object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Driver' and 'Fields & Relationships' with a sub-header '8 Items, Sorted by Field Label'. A search bar 'Quick Find' and buttons 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking' are present. The table lists the following fields:

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)		✓

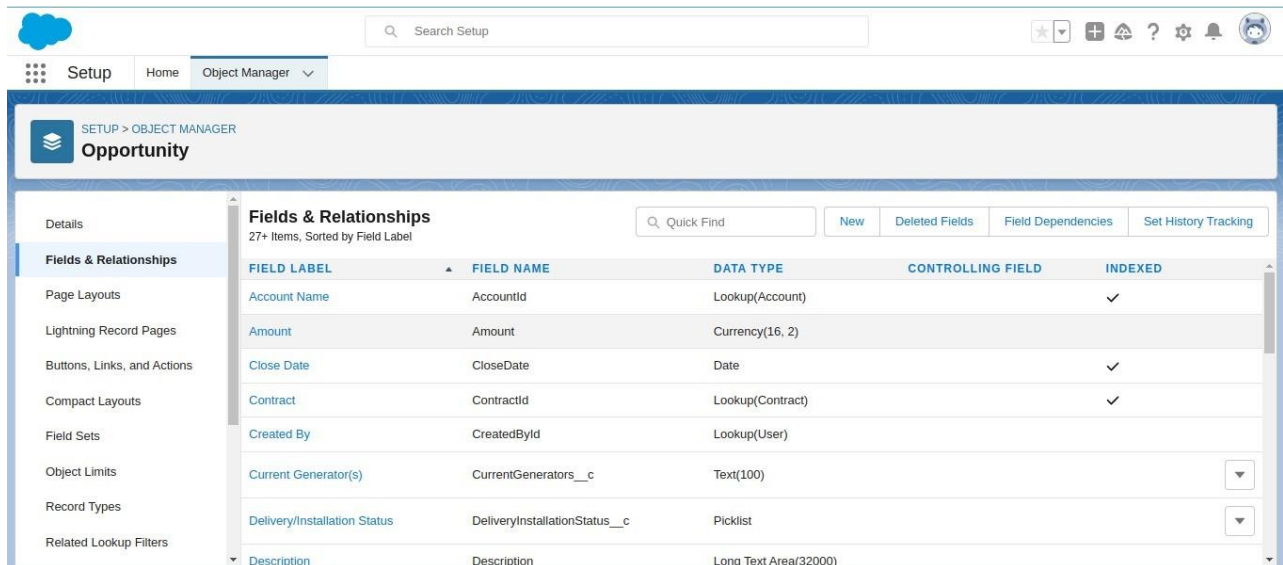
## → Fields In Traveler Objects :



The screenshot shows the Salesforce Setup interface for the Traveler object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Traveler' and 'Fields & Relationships' with a sub-header '6 Items, Sorted by Field Label'. A search bar 'Quick Find' and buttons 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking' are present. The table lists the following fields:

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 :



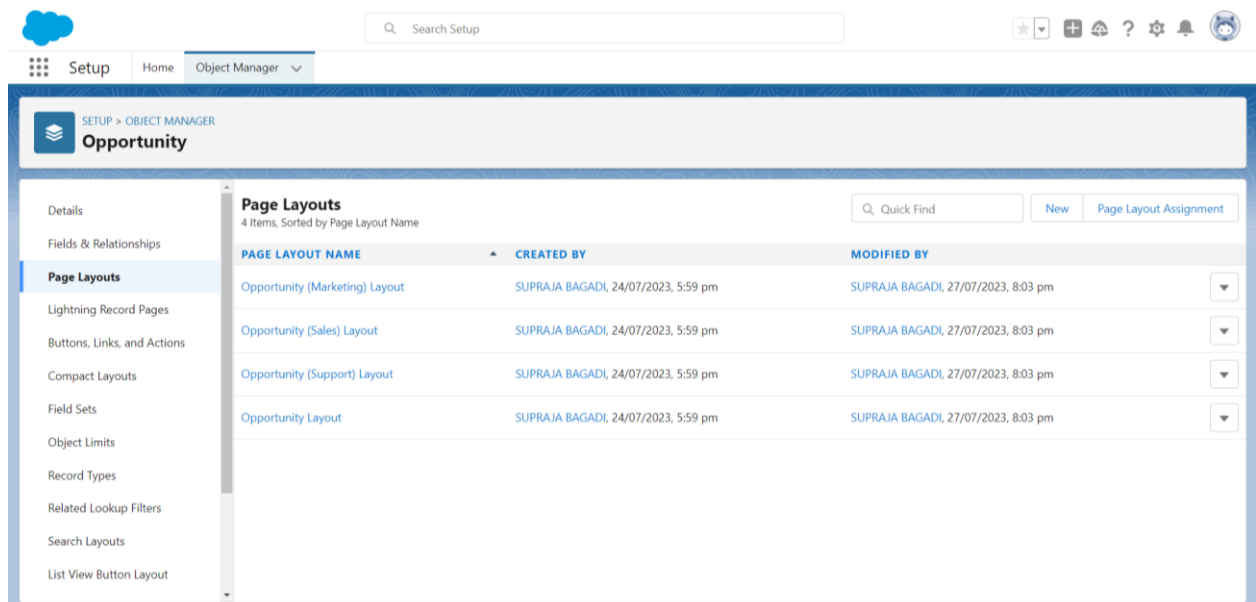
The screenshot shows the Salesforce Setup interface for the Opportunity object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Fields & Relationships' and shows a list of 27+ items, sorted by Field Label. The table below lists the fields and their properties.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account Name	AccountId	Lookup(Account)		✓
Amount	Amount	Currency(16, 2)		
Close Date	CloseDate	Date		✓
Contract	ContractId	Lookup(Contract)		✓
Created By	CreatedById	Lookup(User)		
Current Generator(s)	CurrentGenerators__c	Text(100)		
Delivery/Installation Status	DeliveryInstallationStatus__c	Picklist		
Description	Description	Long Text Area(32000)		

## 4.PAGE LAYOUT SETUP:

### → Organize Opportunity Layout :

- Click on the gear icon and then select Setup.
- Click on the object manager tab just beside the home tab.
- Search in quick find (Opportunity) & select Opportunity.
- Click on page layout and you can add or remove fields by drag & drop.



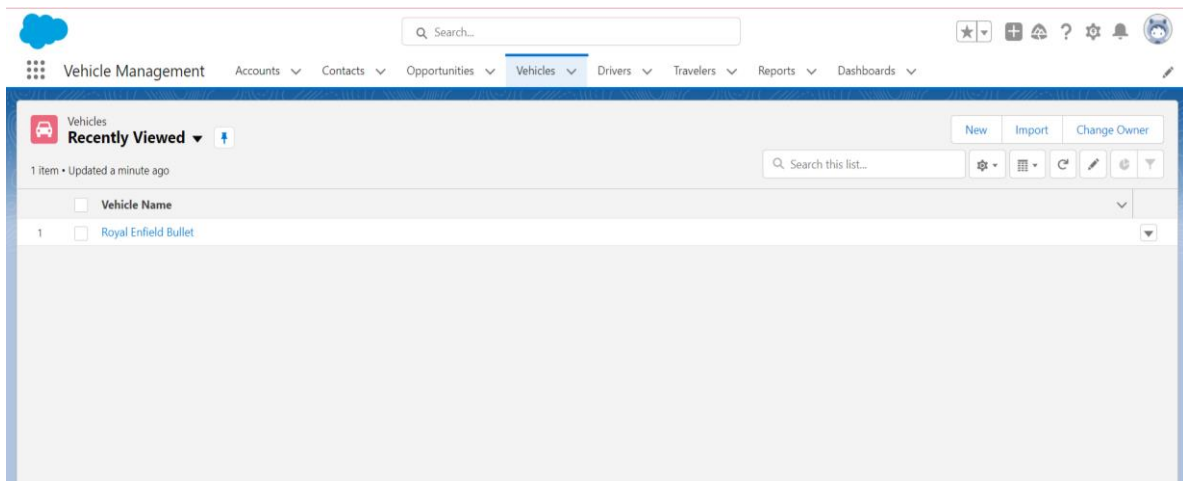
The screenshot shows the Salesforce Setup interface for the Opportunity object, specifically the Page Layouts section. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, and List View Button Layout. The main content area is titled 'Page Layouts' and shows a list of 4 items, sorted by Page Layout Name. The table below lists the page layouts and their properties.

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Opportunity (Marketing) Layout	SUPRAJA BAGADI, 24/07/2023, 5:59 pm	SUPRAJA BAGADI, 27/07/2023, 8:03 pm
Opportunity (Sales) Layout	SUPRAJA BAGADI, 24/07/2023, 5:59 pm	SUPRAJA BAGADI, 27/07/2023, 8:03 pm
Opportunity (Support) Layout	SUPRAJA BAGADI, 24/07/2023, 5:59 pm	SUPRAJA BAGADI, 27/07/2023, 8:03 pm
Opportunity Layout	SUPRAJA BAGADI, 24/07/2023, 5:59 pm	SUPRAJA BAGADI, 27/07/2023, 8:03 pm

## 5.LIGHTNING APP:

### → Create The Vehicle Management App :

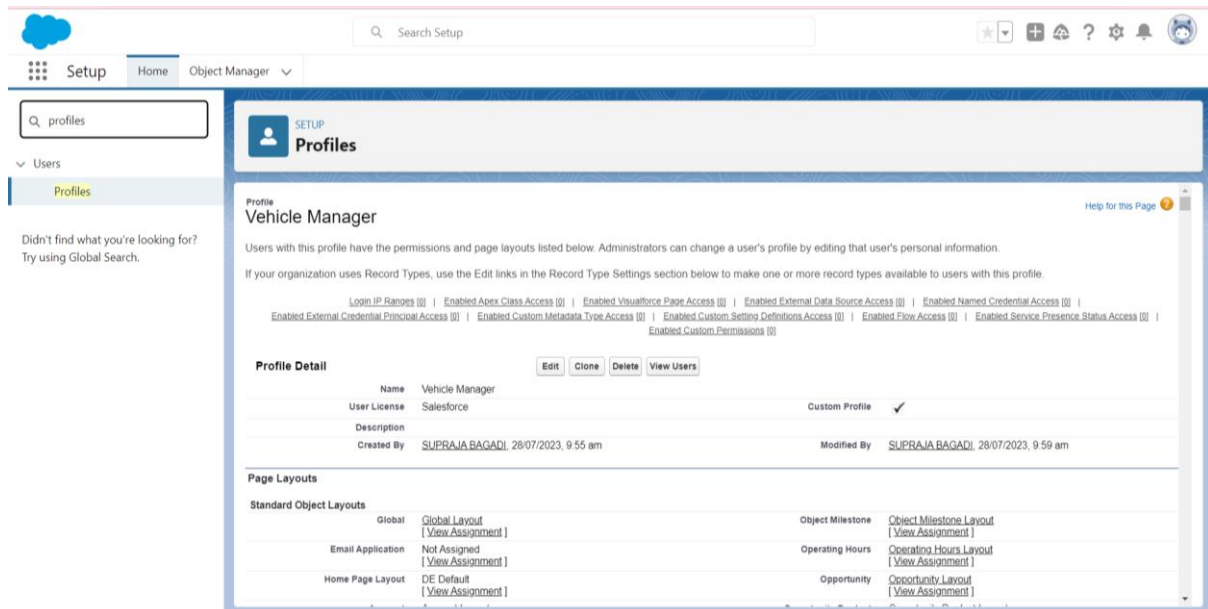
- From Setup, enter App Manager in the Quick Find and select App Manager.
- Click New Lightning App. Enter Vehicle Management as the App Name, then click Next
- Under App Options, leave the default selections and click Next.
- Under Utility Items, select Accounts, Contacts, Opportunities, Vehicle, Driver, Travelers, Reports, and Dashboards and move them to Selected Items. Click Next.
- From Available Profiles select System Administrator and move it to Selected Profiles. Click Save & Finish.
- To Verify your changes, click the App Launcher, type Vehicle Management and Select the Vehicle Management App.



## 6.PROFILE:

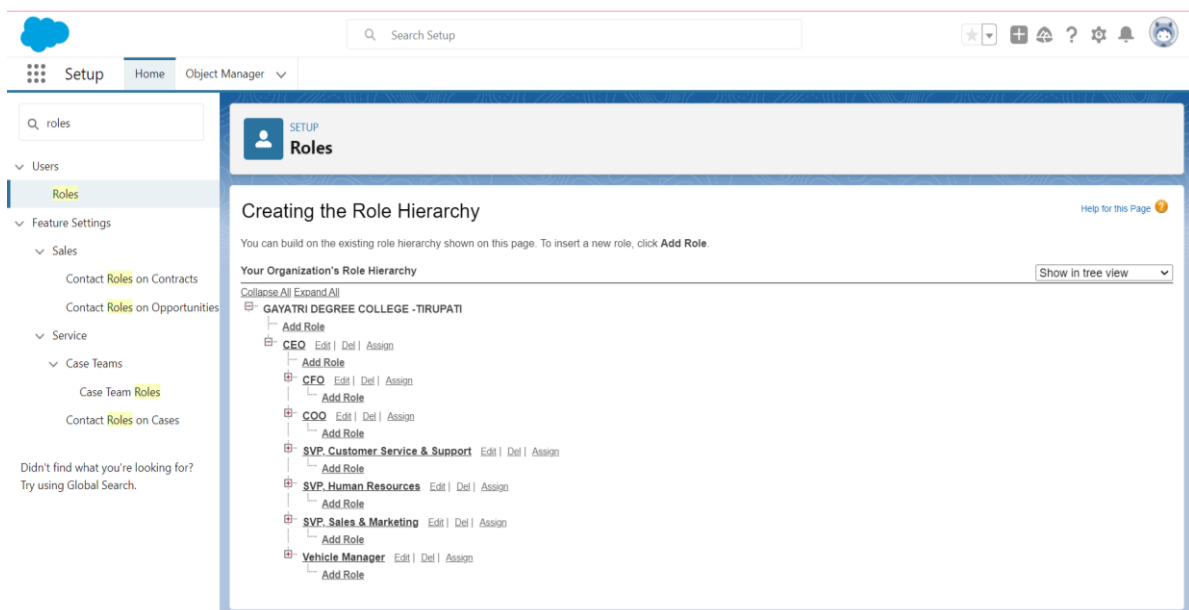
### → Creating A Profile :

- Now create a Vehicle Management Profile and set its object permissions.
- From Setup enter Profiles in the Quick Find box, and select Profiles.
- From the list of profiles, find Standard User.
- Click Clone.
- For Profile Name, enter Vehicle Manager.
- Click Save.
- While still on the Vehicle Manager Profile page, then click Edit.
- Scroll down to Custom Object Permissions and give access for Create, Read, Edit, and Delete, View all and modify all for Vehicle object, Driver object, and Traveler object.



## → Setup Roles :

- Click on the Gear Icon
- Click “setup”
- In the Quick Find box, enter “Roles”
- Click “Roles”
- Click on “Set Up Roles”
- Click “Expand All”
- Under the CEO, Click on ”Add Role”
- Fill Up the label as Vehicle Manager, Role Name Vehicle Manager.
- Enter a Role name that will be displayed on Reports
- Click on Save.



## 7. USERS:

### → Creating A User :

- From Setup, in the Quick Find box, enter Users, and then select Users.
- Click New User.

- Enter the user's name Jhon Teddy and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
- Select a Role(Vehicle Manager)
- Select a User License as Salesforce.
- Select a Profile as Vehicle Manager.

**Setup** Home Object Manager

Search Setup

users

**Users**

Permission Set Groups  
Permission Sets  
Profiles  
Public Groups  
Queues  
Roles  
User Management Settings

**Users**

Feature Settings  
Data.com  
Prospector Users

Didn't find what you're looking for?  
Try using Global Search.

**SETUP Users**

Help for this Page

On this page you can create, view, and manage users.  
In addition, download SalesforceA to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: iOS | Android

View: All Users Edit Create New View

New User Reset Password(s) Add Multiple Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	BAGADI_SUPRAJA	SBAGA	supraja123@gmail.com		✓	System Administrator
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatter.00d5f0000c9f8eavvfzwoiouxiso@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	operator_1_operator	ooper	suprajabagadi2@gmail.com	Vehicle Manager	✓	Salesforce API Only System Integrations
<input type="checkbox"/> Edit	operator_2_operator	o.oee	suprajabagadi3@gmail.com	Vehicle Manager	✓	Standard Platform User
<input type="checkbox"/> Edit	Teddy_John	ted	suprajabagadi1@gmail.com	Vehicle Manager	✓	Vehicle Manager
<input type="checkbox"/> Edit	User_Integration	integ	integration@00d5f0000c9f8eavvfzwoiouxiso@chatter.salesforce.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00d5f0000c9f8eavvfzwoiouxiso@chatter.salesforce.com		✓	Analytics Cloud Security User

New User Reset Password(s) Add Multiple Users

## 8.USER ADPOTION:

### → Create Vehicle Record :

- Click on App Launcher on left side of screen.
- Search Vehicle Management System & click on it.
- Click on Vehicle tab.
- Click New button
- Fill all Vehicle record details.
- Click on Save Button

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

Vehicles

Recently Viewed

1 item • Updated a minute ago

New Import Change Owner

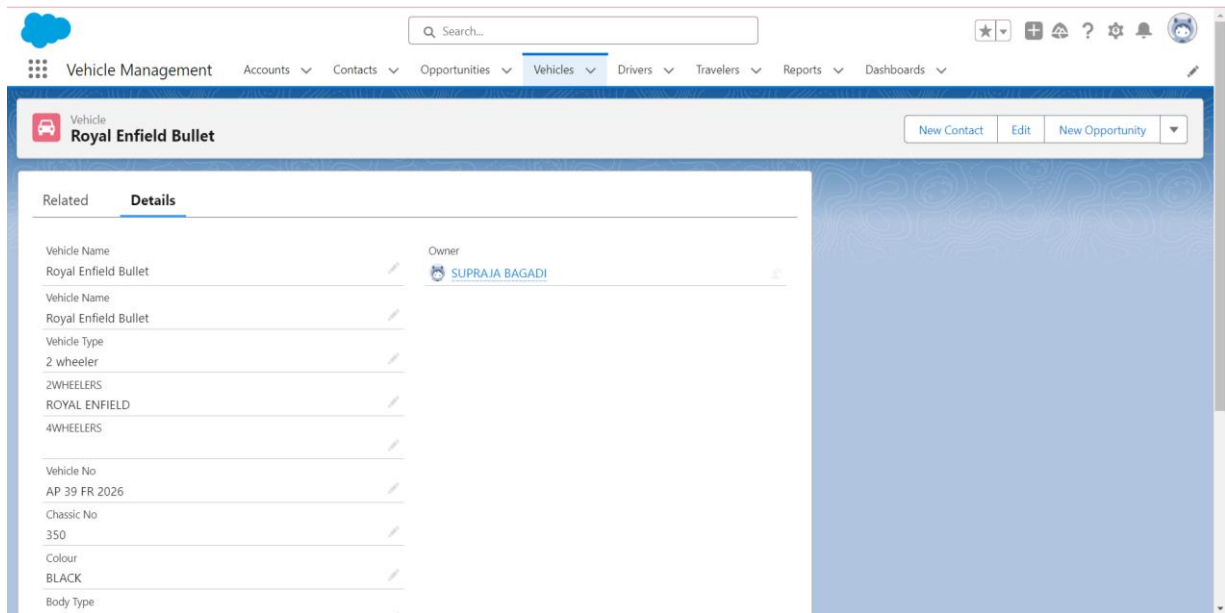
Search this list...

Vehicle Name	Status	Owner
1	<input type="checkbox"/>	Royal Enfield Bullet



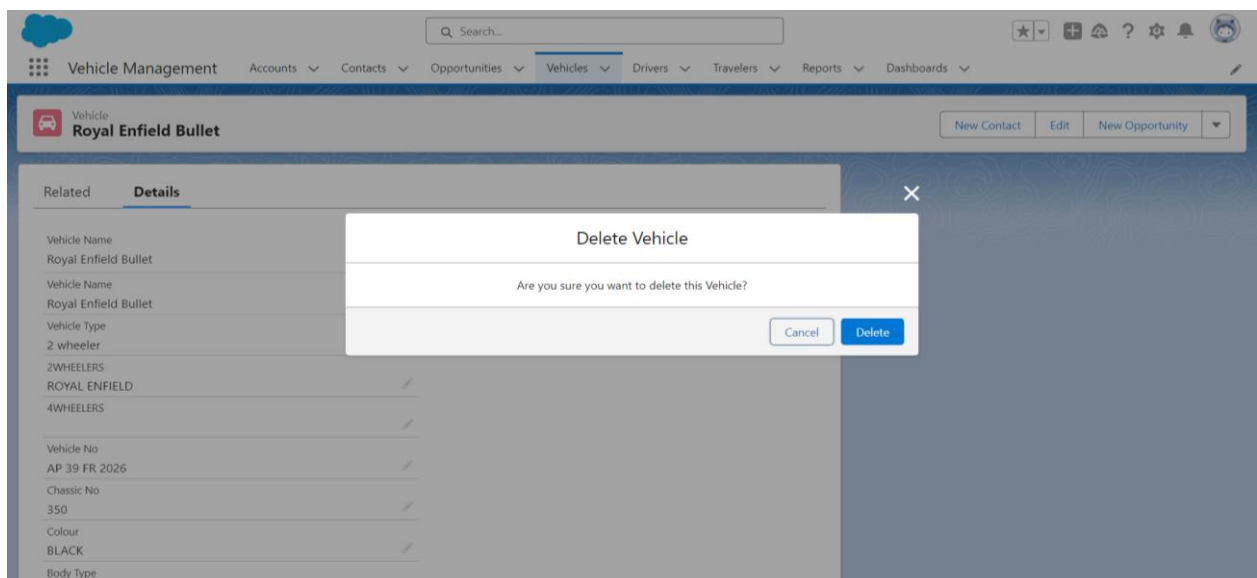
### → View Record (Vehicle) :

- Click on App Launcher on left side of screen.
- Search Vehicle Management System & click on it.
- Click on Vehicle Tab.
- Click on any record name. you can see the details of the Vehicle



### → Delete Record (Vehicle) :

- Click on App Launcher on left side of screen.
- Search Vehicle Management System & click on it.
- Click on Vehicle Tab.
- Click on Arrow at right hand side on that Particular record.
- Click delete and delete again.

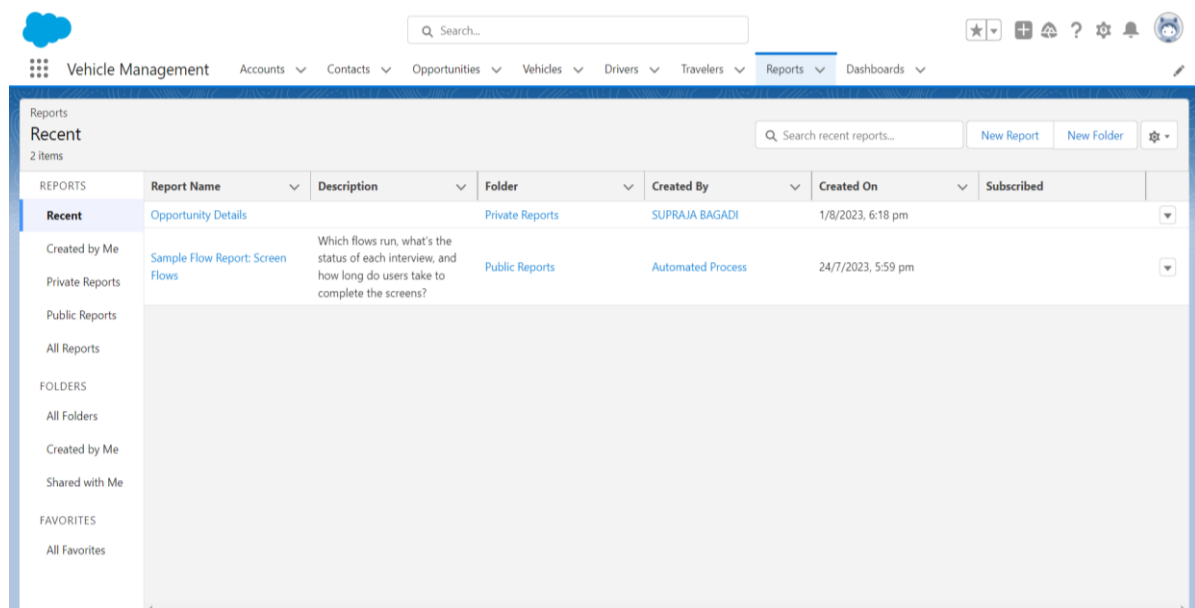




## 9.REPORTS AND DASHBOARDS:

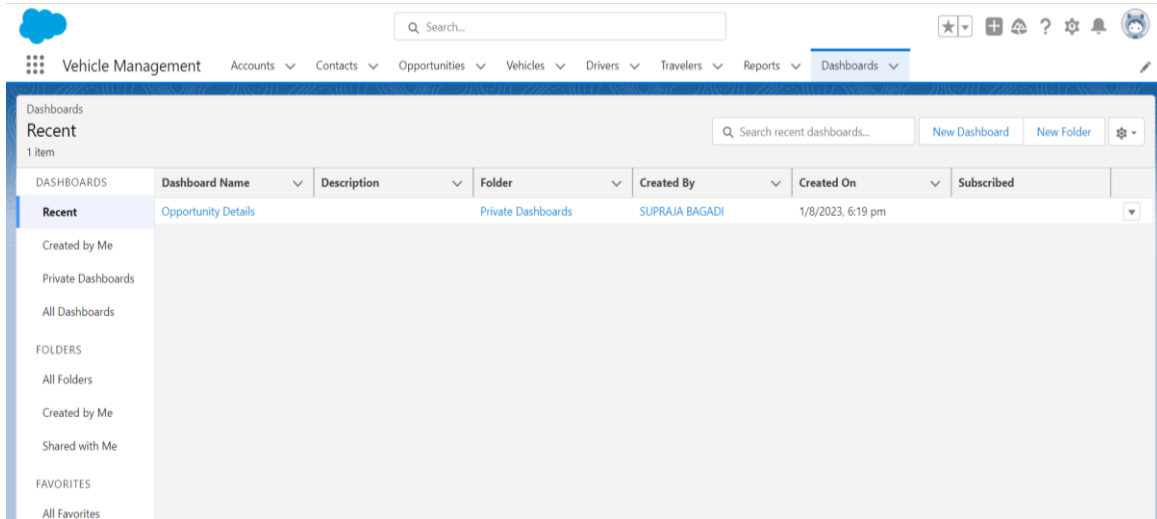
### → Create Report :

- Go to Reports and click New Report.
- Select the Opportunity and Customer Name report type and click StartReport.
- To begin filtering, click Filters.
- Click the Show Me standard filter and select All Opportunity. Click Apply.
- Click on add columns add Opportunity: Opportunity name, Account Name,Amount, Traveler name etc.
- Reports needs to be Grouped by one field.(ex - Created by) (require to enable add chart)
- Click Save.
- Save your report as Opportunity Details and accept the auto-generated unique name.



### → Create Dashboard :

- Click the Dashboards tab.
- Click New Dashboard.
- Name the dashboard Opportunity Details and click Create.
- Click +Component.
- Select the Opportunity Details and click Select.
- Select the Vertical Bar Chart component and click Add.
- Click Save and then Done.



## 10.REPORTING:

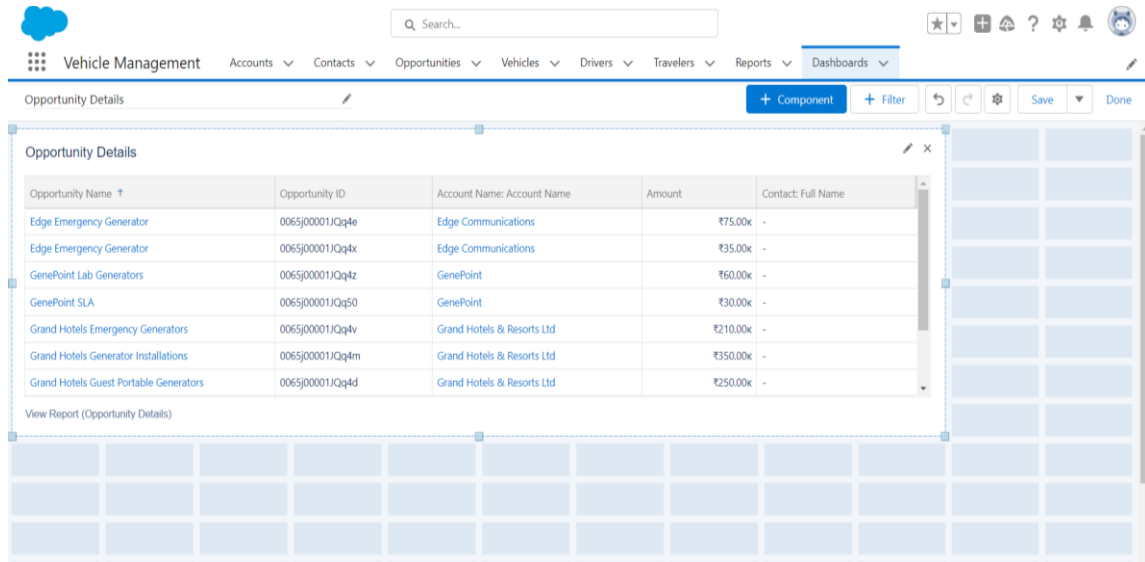
### → Report :

- Click on App Launcher on left side of screen.
- Search Vehicle Management System & click on it.
- Click on Reports Tab.
- Click on Opportunity Details report and see records

	Opportunity Name	Opportunity ID	Account Name: Account Name	Amount	Contact: Full Name	Description	Last Activity	Next Step	Quantity	Type
1	GenePoint Lab Generators	0065j00001JQq4z	GenePoint	₹60,000.00	-	-	-	-	-	-
2	GenePoint SLA	0065j00001JQq50	GenePoint	₹30,000.00	-	-	-	-	-	Existing Customer
3	Edge Emergency Generator	0065j00001JQq4e	Edge Communications	₹75,000.00	-	-	-	-	-	New Customer
4	Edge Emergency Generator	0065j00001JQq4x	Edge Communications	₹35,000.00	-	-	-	-	-	Existing Customer
5	Grand Hotels Emergency Generators	0065j00001JQq4v	Grand Hotels & Resorts Ltd	₹2,10,000.00	-	-	-	-	-	New Customer
6	Grand Hotels Guest Portable Generators	0065j00001JQq4d	Grand Hotels & Resorts Ltd	₹2,50,000.00	-	-	-	-	-	Existing Customer
7	United Oil Refinery Generators	0065j00001JQq4a	United Oil & Gas Corp.	₹2,70,000.00	-	-	-	-	-	Existing Customer
8	United Oil SLA	0065j00001JQq4X	United Oil & Gas Corp.	₹1,20,000.00	-	-	-	-	-	Existing Customer
9	United Oil Standby Generators	0065j00001JQq4y	United Oil & Gas Corp.	₹1,20,000.00	-	-	-	-	-	Existing Customer
10	Grand Hotels Generator Installations	0065j00001JQq4m	Grand Hotels & Resorts Ltd	₹3,50,000.00	-	-	-	-	-	Existing Customer
11				₹15,20,000.00					0.00	

## → Dashboard :

- Click on App Launcher on left side of screen.
- Search Vehicle Management System & click on it.
- Click on Dashboard Tab.
- Click on Opportunity and Dashboard and see graph view of record.



The screenshot displays the 'Vehicle Management' dashboard. At the top, there is a search bar and navigation tabs for Accounts, Contacts, Opportunities, Vehicles, Drivers, Travelers, Reports, and Dashboards. The 'Opportunity Details' section is active, showing a table with columns: Opportunity Name, Opportunity ID, Account Name, Amount, and Contact: Full Name. The table lists several opportunities, including 'Edge Emergency Generator', 'GenePoint Lab Generators', 'GenePoint SLA', 'Grand Hotels Emergency Generators', 'Grand Hotels Generator Installations', and 'Grand Hotels Guest Portable Generators'. Below the table, there is a 'View Report (Opportunity Details)' button and a grid of placeholder images for reports or charts.

Opportunity Name	Opportunity ID	Account Name	Amount	Contact: Full Name
Edge Emergency Generator	0065j00001jQq4e	Edge Communications	₹75.00k	-
Edge Emergency Generator	0065j00001jQq4x	Edge Communications	₹35.00k	-
GenePoint Lab Generators	0065j00001jQq4z	GenePoint	₹60.00k	-
GenePoint SLA	0065j00001jQq50	GenePoint	₹30.00k	-
Grand Hotels Emergency Generators	0065j00001jQq4v	Grand Hotels & Resorts Ltd	₹210.00k	-
Grand Hotels Generator Installations	0065j00001jQq4m	Grand Hotels & Resorts Ltd	₹350.00k	-
Grand Hotels Guest Portable Generators	0065j00001jQq4d	Grand Hotels & Resorts Ltd	₹250.00k	-

\*\*\* THE END \*\*\*