

PROJECT REPORT ON VEHICLE MANAGEMENT SYSTEM USING SALESFORCE

1. CREATING A DEVELOPER ACCOUNT:

- ❖ Go to developers.salesforce.com
- ❖ Click on sign up
- ❖ On the sign up form, enter the following details :
- ❖ First name & Last name : DEEPIKA and CHENNAPATNAM
- ❖ Email: chennapatnamdeepika@gmail.com
- ❖ Role : SALESFORCE DEVELOPER
- ❖ Company : College Name - GAYATRI DEGREE COLLEGE – TIRUPATI
- ❖ County : India
- ❖ Postal Code : pin code – 517501
- ❖ Username : chennapatnamdeepika@gdctirupati.com

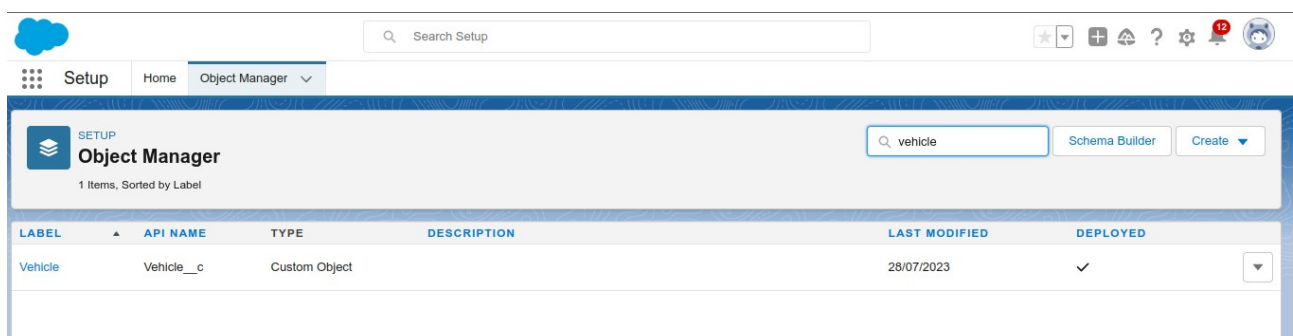
2. CREATE OBJECTS:

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.

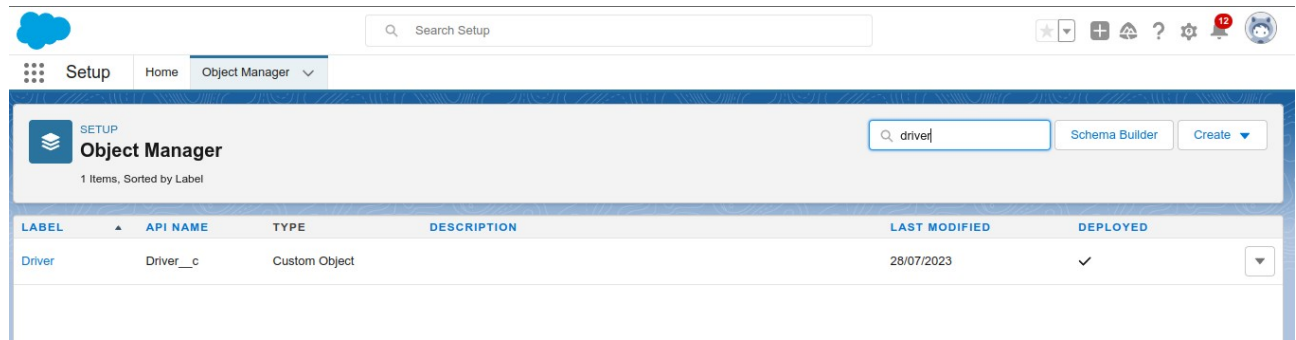
★ Standard Objects : Account, Contact, Opportunity.

★ Custom objects : Vehicle, Driver, Traveler.

→ Vehicle :



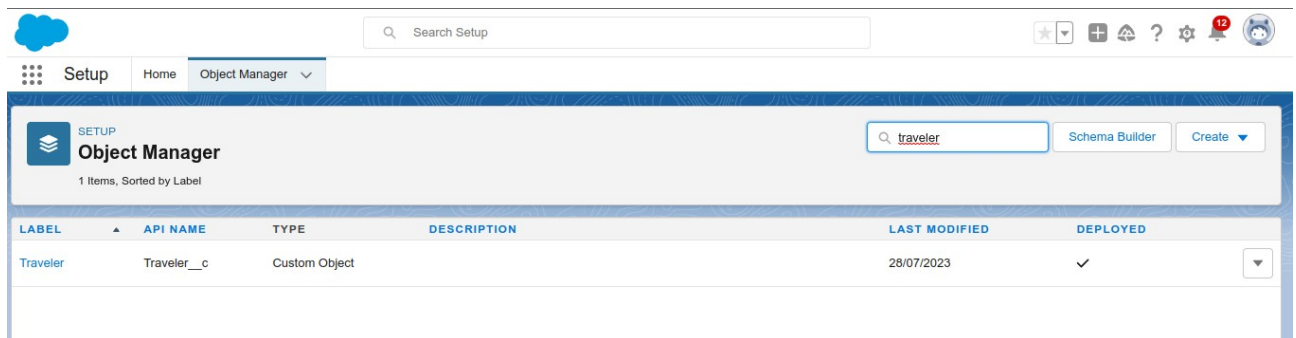
→ Driver :



The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main header displays 'Object Manager' with a search bar containing 'driver'. Below the header, a table lists the objects. The table has columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The table contains one row for the 'Driver' object.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Driver	Driver__c	Custom Object		28/07/2023	✓

→ Traveler :



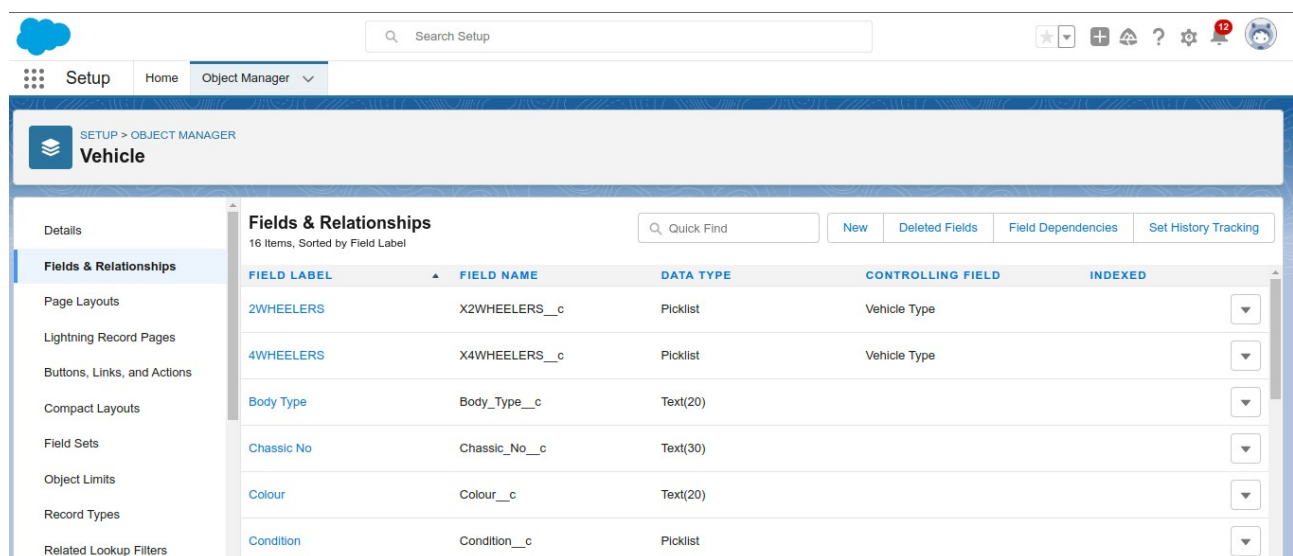
The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main header displays 'Object Manager' with a search bar containing 'traveler'. Below the header, a table lists the objects. The table has columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The table contains one row for the 'Traveler' object.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Traveler	Traveler__c	Custom Object		28/07/2023	✓

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 contains a navigation menu with options: 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 table of fields. The table has columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table contains 16 items, sorted by Field Label. The first six items are visible in the screenshot.

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 :

Setup Home Object Manager

Search Setup

Setup > OBJECT MANAGER

Vehicle

Details

Fields & Relationships

16 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Field Label	Field Name	Data Type	Controlling Field	Indexed
Owner	OwnerId	Lookup(User,Group)		✓
Seats	Seats__c	Number(2, 0)		
Vehicle Includes	Vehicle_Includes__c	Picklist (Multi-Select)		
Vehicle Name	Vehicle_Name__c	Text(100)		
Vehicle Name	Name	Text(80)		✓
Vehicle No	Vehicle_No__c	Text(20)		
Vehicle Type	Vehicle_Type__c	Picklist		

→ Fields In Driver Objects :

Setup Home Object Manager

Search Setup

Setup > OBJECT MANAGER

Driver

Details

Fields & Relationships

9 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	Driver_Name__c	Text(30)		
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	Text(20)		

→ Fields In Traveler Objects :

Setup Home Object Manager

Search Setup

Setup > OBJECT MANAGER

Traveler

Details

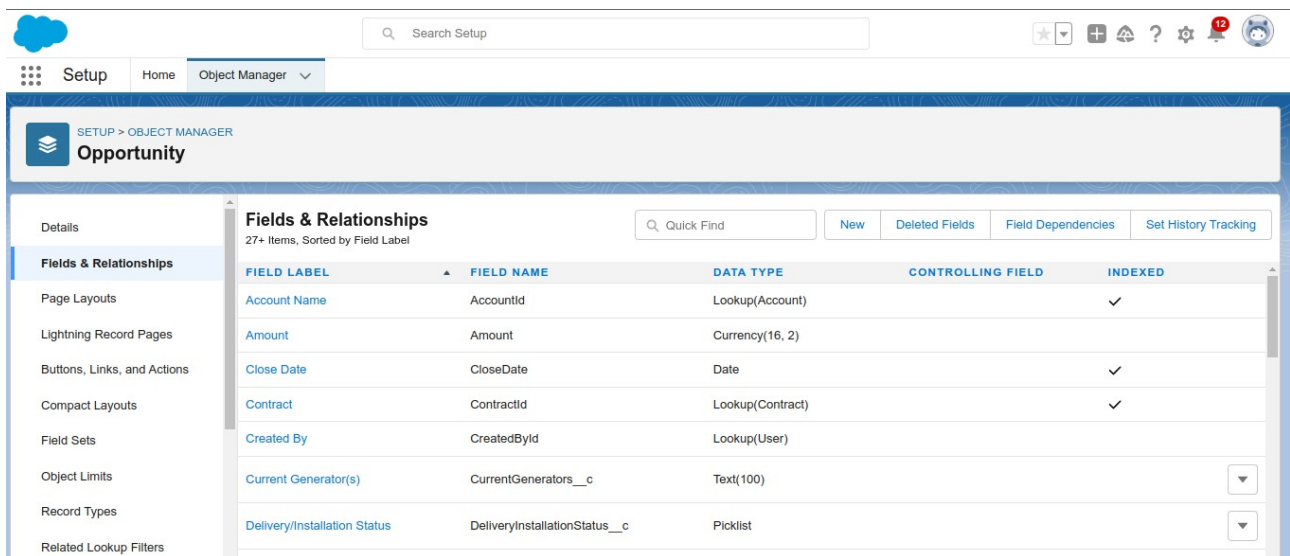
Fields & Relationships

7 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	Traveler_Name__c	Text(16)		
Traveler Name	Name	Text(80)		✓

→ Fields In Opportunity Objects :



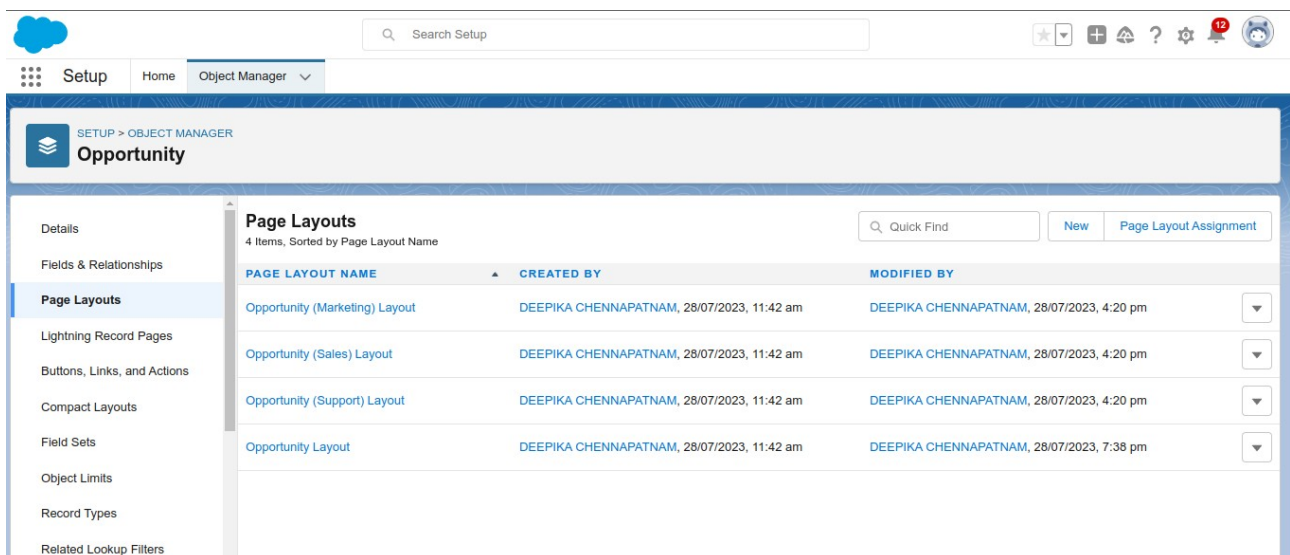
The screenshot shows the Salesforce Setup interface, specifically the Object Manager for the Opportunity object. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area displays a table of fields for the Opportunity object, sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status.

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		

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, specifically the Object Manager for the Opportunity object. The left sidebar lists various setup options, with 'Page Layouts' selected. The main content area displays a table of page layouts for the Opportunity object, sorted by Page Layout Name. The table includes columns for Page Layout Name, Created By, and Modified By.

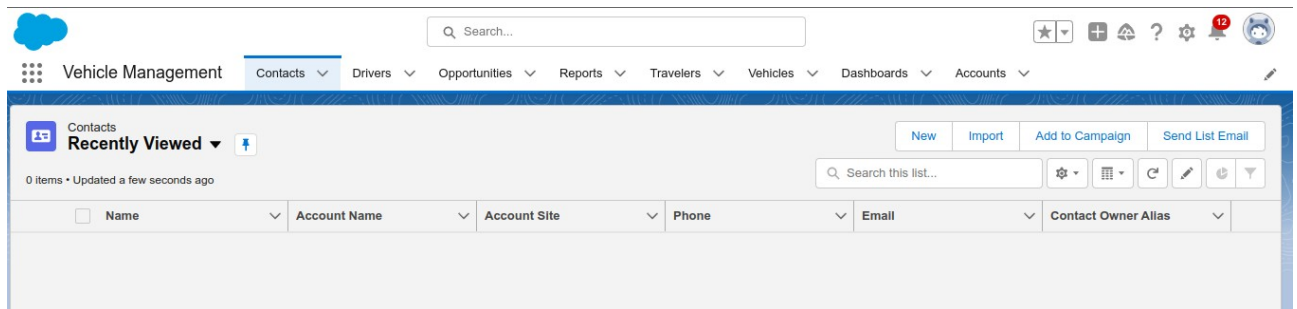
PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Opportunity (Marketing) Layout	DEEPIKA CHENNAPATNAM, 28/07/2023, 11:42 am	DEEPIKA CHENNAPATNAM, 28/07/2023, 4:20 pm
Opportunity (Sales) Layout	DEEPIKA CHENNAPATNAM, 28/07/2023, 11:42 am	DEEPIKA CHENNAPATNAM, 28/07/2023, 4:20 pm
Opportunity (Support) Layout	DEEPIKA CHENNAPATNAM, 28/07/2023, 11:42 am	DEEPIKA CHENNAPATNAM, 28/07/2023, 4:20 pm
Opportunity Layout	DEEPIKA CHENNAPATNAM, 28/07/2023, 11:42 am	DEEPIKA CHENNAPATNAM, 28/07/2023, 7:38 pm

5.LIGHTING 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.

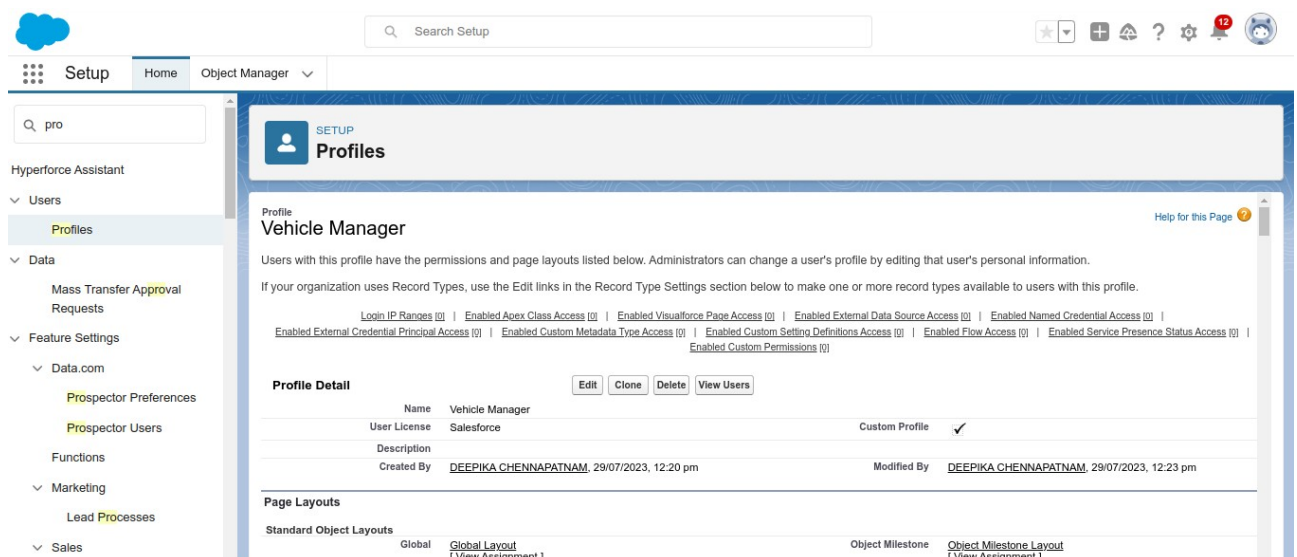
- ❖ Under Utility Items, leave as is and click Next.
- ❖ From Available Items, select Accounts, Contacts, Opportunities, Vehicle ,Driver, Travelers, Reports, and Dashboards and move them to Selected Items. Click Next.
- ❖ From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.
- ❖ To verify your changes, click the App Launcher, type Vehicle Management and select the Vehicle Management app



6.PROFILE:

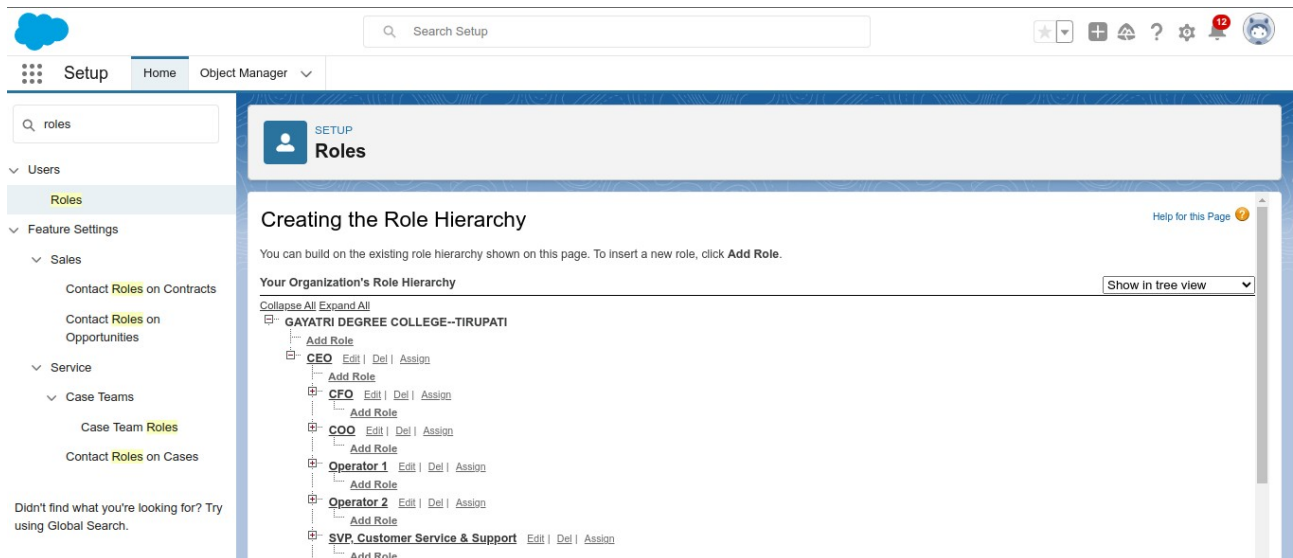
→ Creating A Profile :

- ❖ Now create a Vehicle Manager 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 :

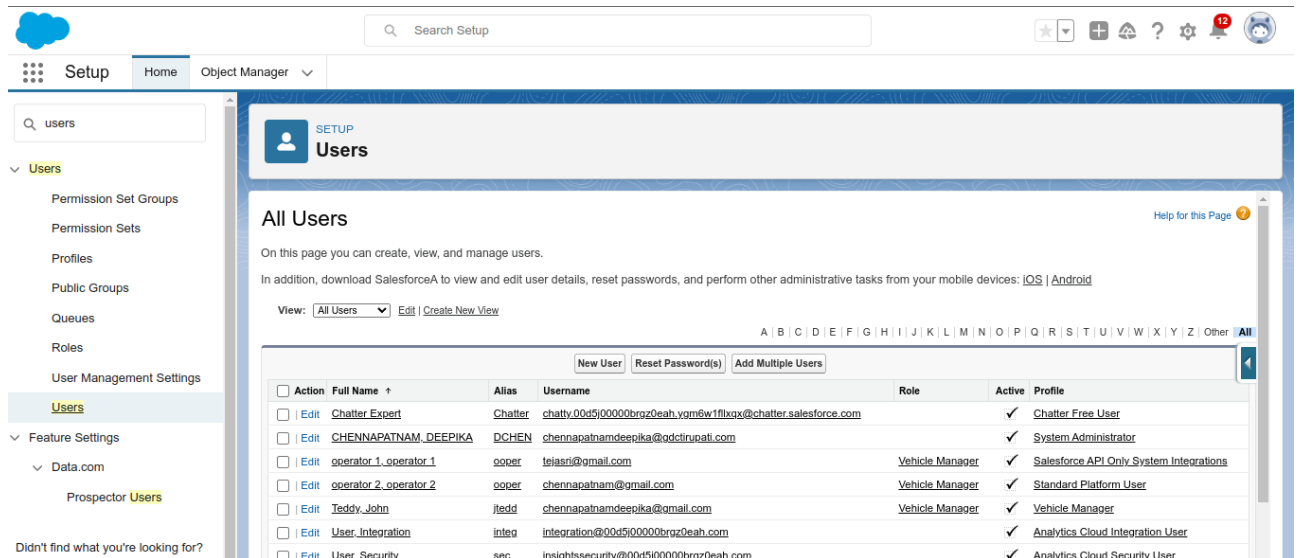
- ❖ Click on the Gear Icon
- ❖ Click "Setup"
- ❖ In the Quick Find box, enter "Roles"
- ❖ Click "Roles"
- ❖ Click on "Set Up Roles"
- ❖ Click "Expand All"
- ❖ Under the CEO, click on "Add Role"
- ❖ Fill up the Label as Vehicle Manager, Role Name Vehicle Manager.



7.USERS:

→ Creating A User :

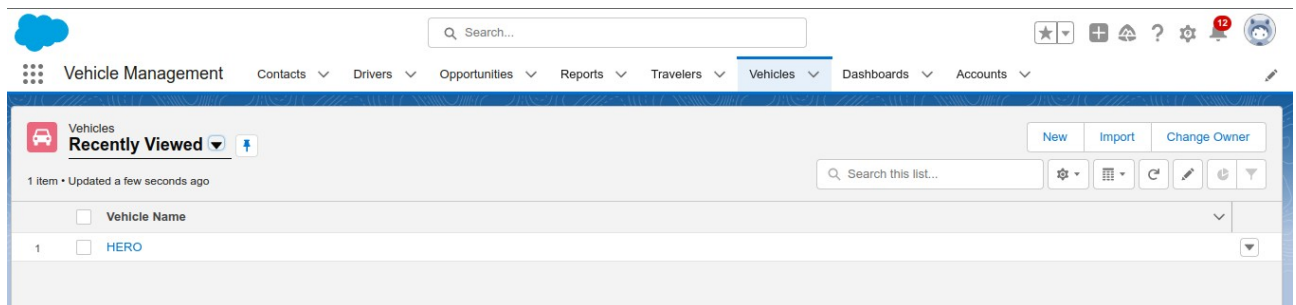
- ❖ From Setup, in the Quick Find box, enter Users, and then select Users.
- ❖ Click New User.
- ❖ Enter the user's name John Teddy and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
- ❖ Select a Role(Vehicle Manager)
- ❖ Select a User License As salesforce
- ❖ Select a profile as Vehicle Manager.



8.USER ADPOTION:

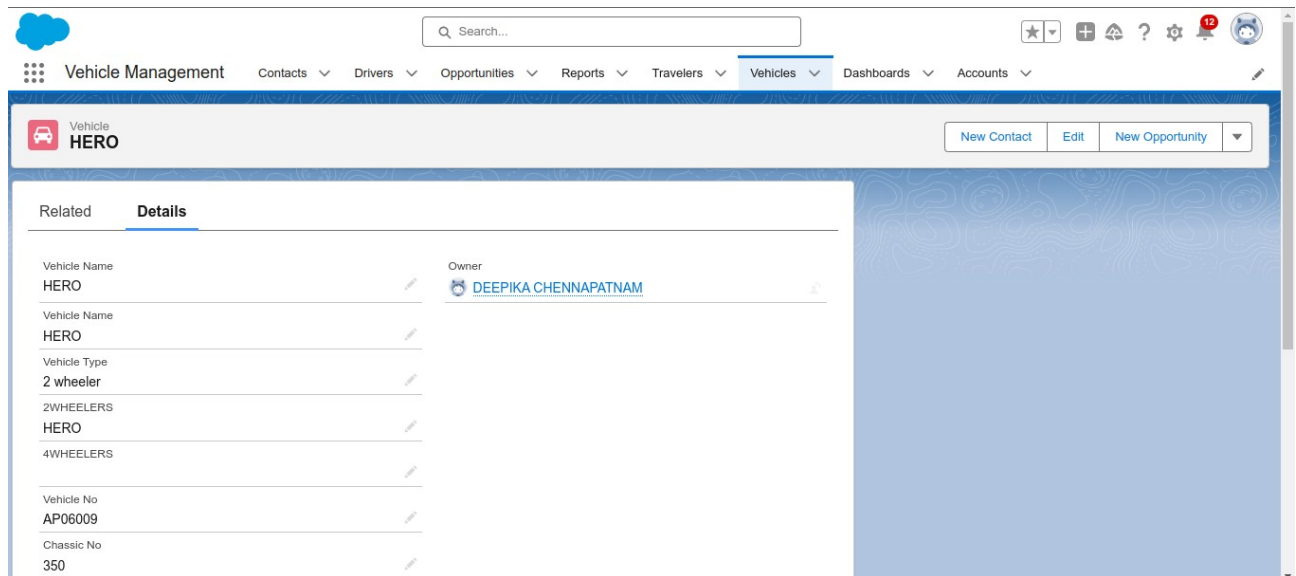
→ Create Vehicle Record :

- ❖ 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



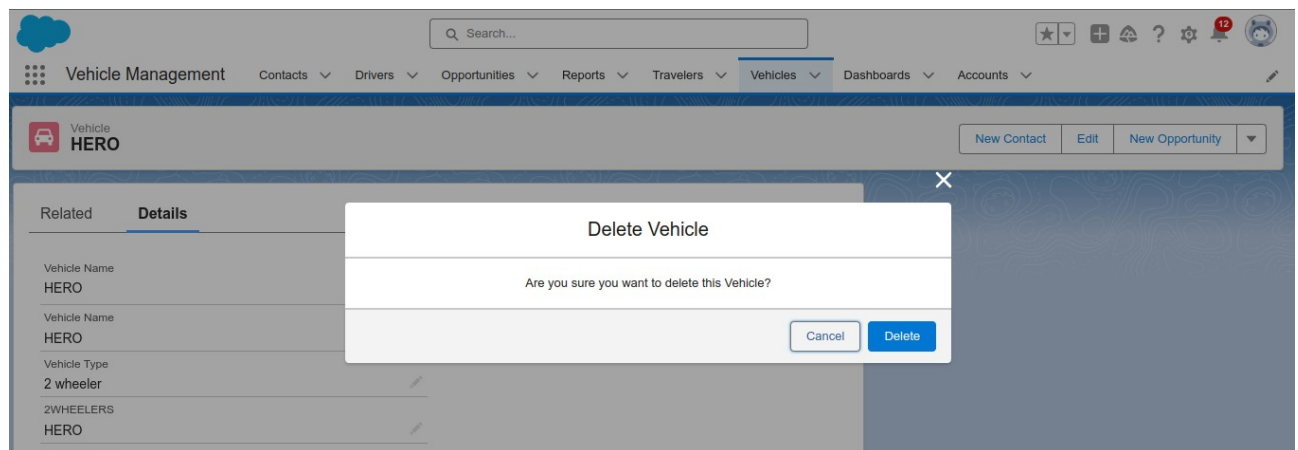
→ View Record (Vehicle) :

- ❖ 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.

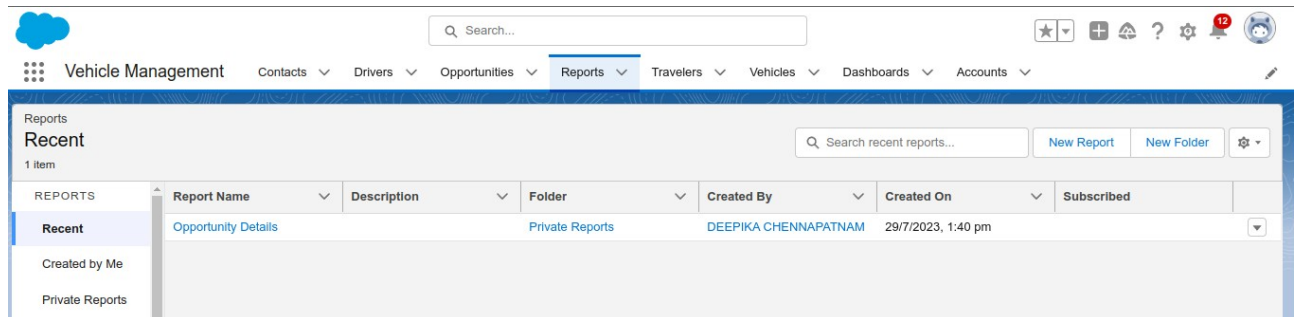


9.REPORTS AND DASHBOARDS:

→ Create Report :

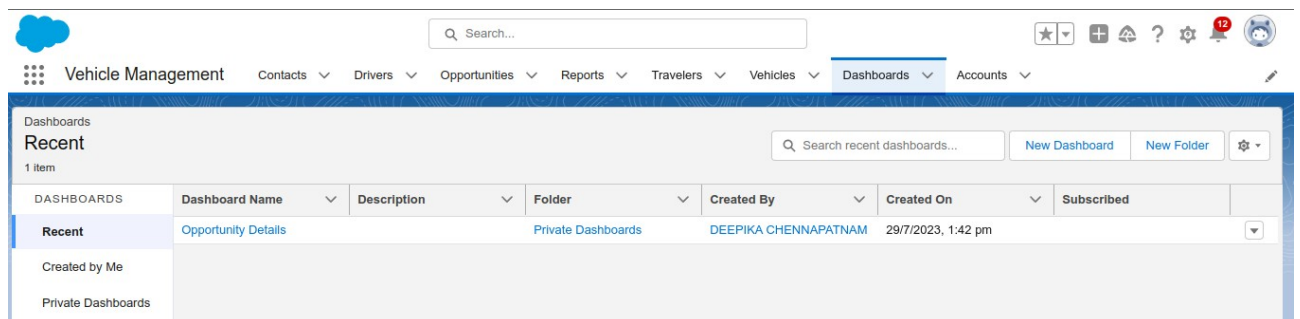
- ❖ Go to Reports and click New Report.
- ❖ Select the Opportunity and Customer Name report type and click Start Report.
- ❖ To begin filtering, click Filters.
- ❖ Click the Show Me standard filter and select All Opportunity. Click Apply.
- ❖ Click on add columns add Opportunity: Opportunity name, Account 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

Vehicle Management

Search...

Reports

Report: Opportunity and Customer Name
Opportunity Details

Enable Field Editing

Add Chart

Edit

Total Records: 11
Total Amount: ₹24,35,000.00

	Opportunity Name	Opportunity Owner: Full Name	Account Name: Account Name	Amount	Contact: Full Name	Description	Journey Start Date	Last Modified Date
1	GenePoint Lab Generators	DEEPIKA CHENNAPATNAM	GenePoint	₹60,000.00	-	-	-	28/07/2022
2	GenePoint SLA	DEEPIKA CHENNAPATNAM	GenePoint	₹30,000.00	-	-	-	28/07/2022
3	Edge Emergency Generator	DEEPIKA CHENNAPATNAM	Edge Communications	₹75,000.00	-	-	-	28/07/2022
4	Edge Emergency Generator	DEEPIKA CHENNAPATNAM	Edge Communications	₹35,000.00	-	-	-	28/07/2022
5	Grand Hotels Emergency Generators	DEEPIKA CHENNAPATNAM	Grand Hotels & Resorts Ltd	₹2,10,000.00	-	-	-	28/07/2022
6	Grand Hotels Guest Portable Generators	DEEPIKA CHENNAPATNAM	Grand Hotels & Resorts Ltd	₹2,50,000.00	-	-	-	28/07/2022
7	United Oil Refinery Generators	DEEPIKA CHENNAPATNAM	United Oil & Gas Corp.	₹2,70,000.00	-	-	-	28/07/2022
8	United Oil SLA	DEEPIKA CHENNAPATNAM	United Oil & Gas Corp.	₹1,20,000.00	-	-	-	28/07/2022
9	United Oil Standby Generators	DEEPIKA CHENNAPATNAM	United Oil & Gas Corp.	₹1,20,000.00	-	-	-	28/07/2022
10	United Oil Refinery Generators	DEEPIKA CHENNAPATNAM	United Oil & Gas Corp.	₹9,15,000.00	-	-	-	28/07/2022
11	Grand Hotels Generator Installations	DEEPIKA CHENNAPATNAM	Grand Hotels & Resorts Ltd	₹3,50,000.00	-	-	-	28/07/2022

→ 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 END ***