

# PROJECT REPORT

## VEhicle management system using Salesforce

### 1.creatingadeveloper 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 : Shanthi and nethi
- ❖ email: [Shanthiroyal8688@gmail.com](mailto:Shanthiroyal8688@gmail.com)
- ❖ role : Salesforce developer
- ❖ company : College name - gayatri degree college – tirupati
- ❖ county : India
- ❖ postal code : Pin code – 517502
- ❖ username : [Shanthiroyal@gdctirupati.com](mailto:Shanthiroyal@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 :

Cloud logo | Search Setup | Setup | Home | Object Manager

Object Manager | 1 Items, Sorted by Label

Search: vehicle | Schema Builder | Create

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Vehicle	Vehicle__c	Custom Object		28/07/2023	✓

➔Driver :

Cloud logo | Search Setup | Setup | Home | Object Manager

Object Manager | 1 Items, Sorted by Label

Search: driver | Schema Builder | Create

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

➔Traveler :

Cloud logo | Search Setup | Setup | Home | Object Manager

Object Manager | 1 Items, Sorted by Label

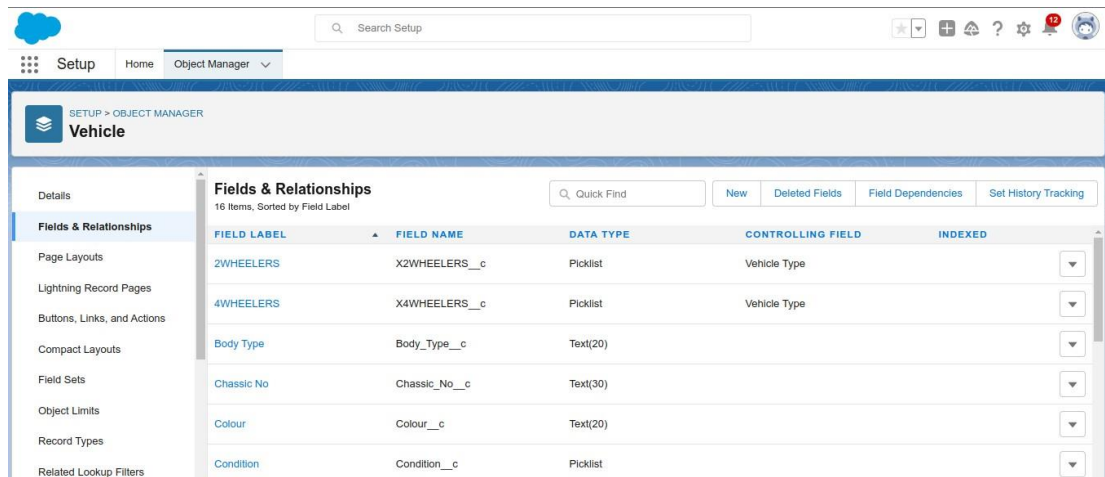
Search: traveler | Schema Builder | Create

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

### 3.FIELD SAND 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.

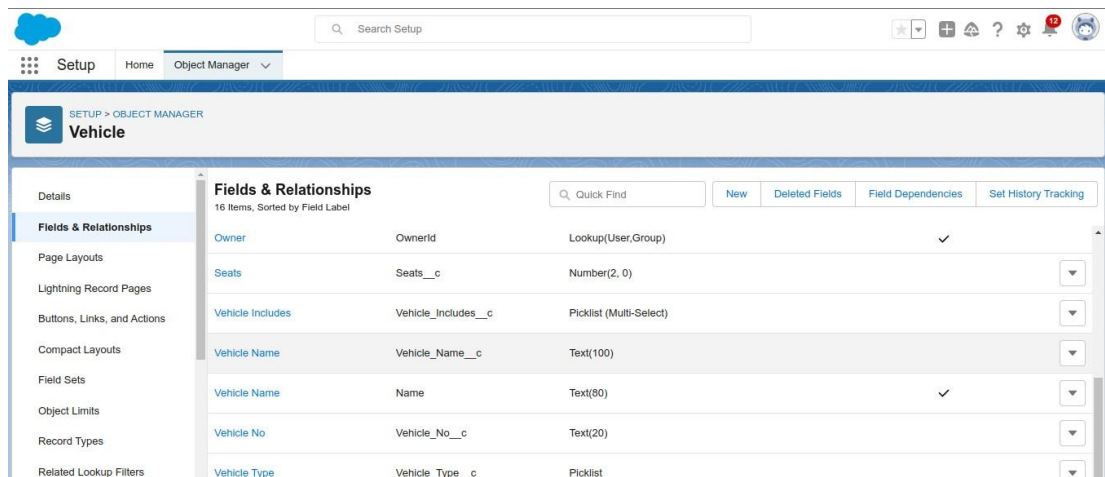
## → Creation of Fields :



The screenshot shows the Salesforce Setup interface for the 'Vehicle' object. The 'Fields & Relationships' section is active, displaying a list of 16 fields sorted by Field Label. The fields are:

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 'Fields & Relationships' section is active, displaying a list of 16 fields sorted by Field Label. The fields are:

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 Traveler 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(50)		✓
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(30)		
Photo	Photo	Image		

## ➔Fields In Driver 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 :

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER  
**Opportunity**

Details

**Fields & Relationships**  
27+ Items, Sorted by Field Label

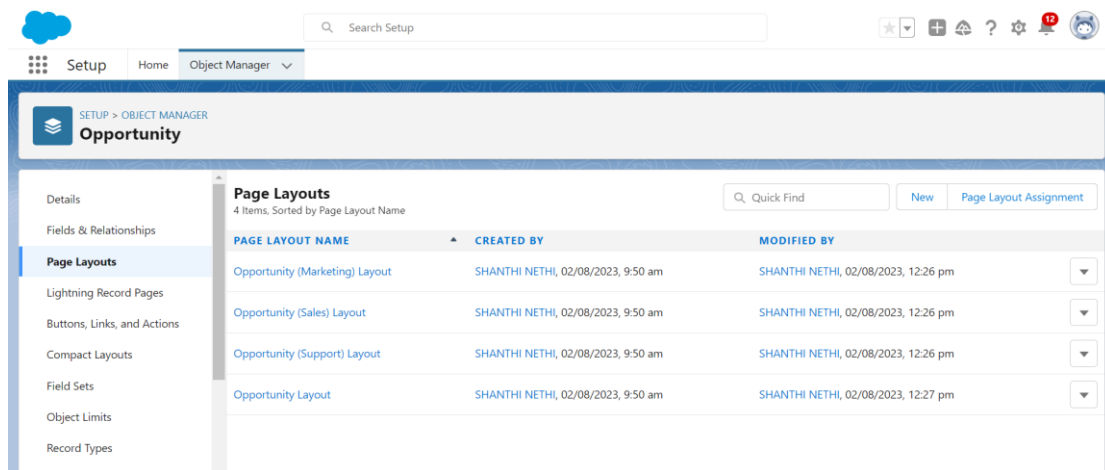
Quick Find New Deleted Fields Field Dependencies Set History Tracking

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 :

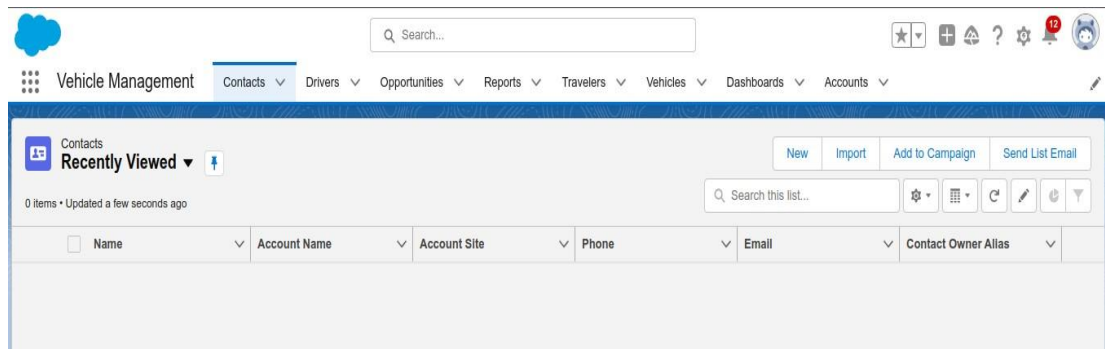
- ❖ Click on the gear icon and then select Setup.
- ❖ Search in quick find (Opportunity) & select Opportunity.
- ❖ Click on page layout and you can add or remove fields by drag & drop



## 5. LIGHTNINGAPP:

### → Create The Vehicle ManagementApp :

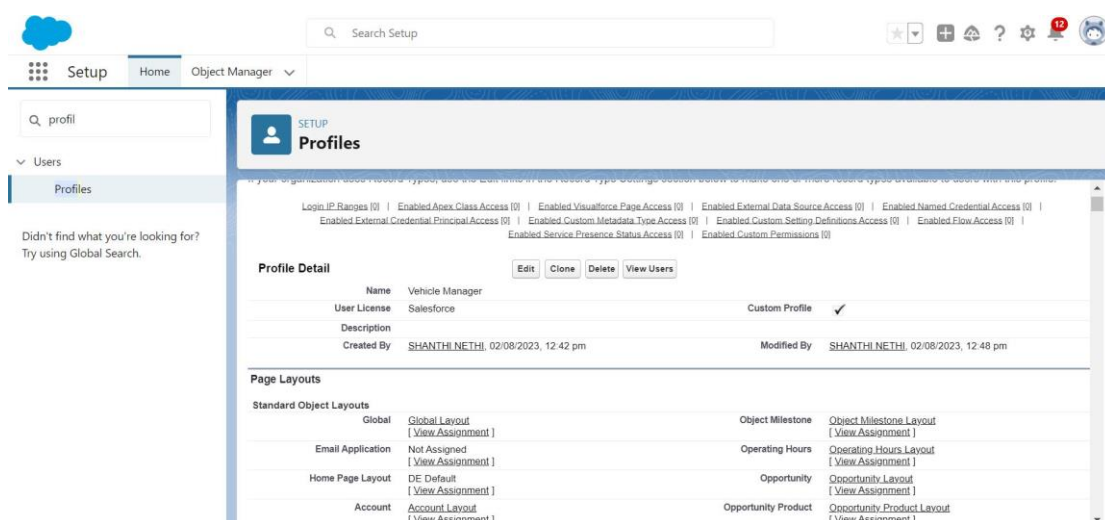
- ❖ From Setup, enter App Manager in the Quick Find and select App Manager
- ❖ click New LightningApp. Enter Vehicle Management as the App Name, then click next
- ❖ Under App Options, leave the default selections and click Next.
- ❖ Under Utility Items, leave as is and click Next.  
From Available Items, 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:

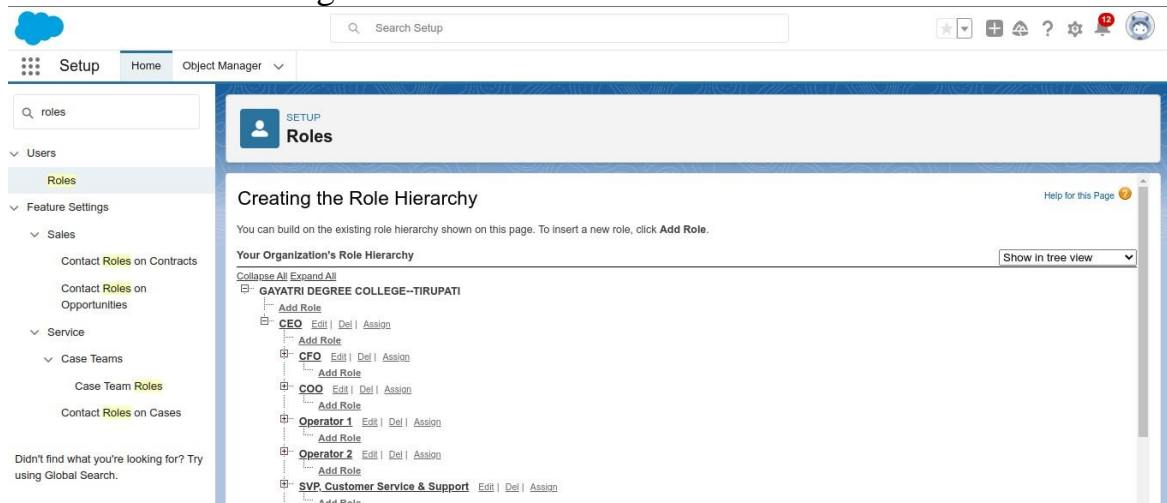
### → Creating a Profile :

- ❖ 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 :

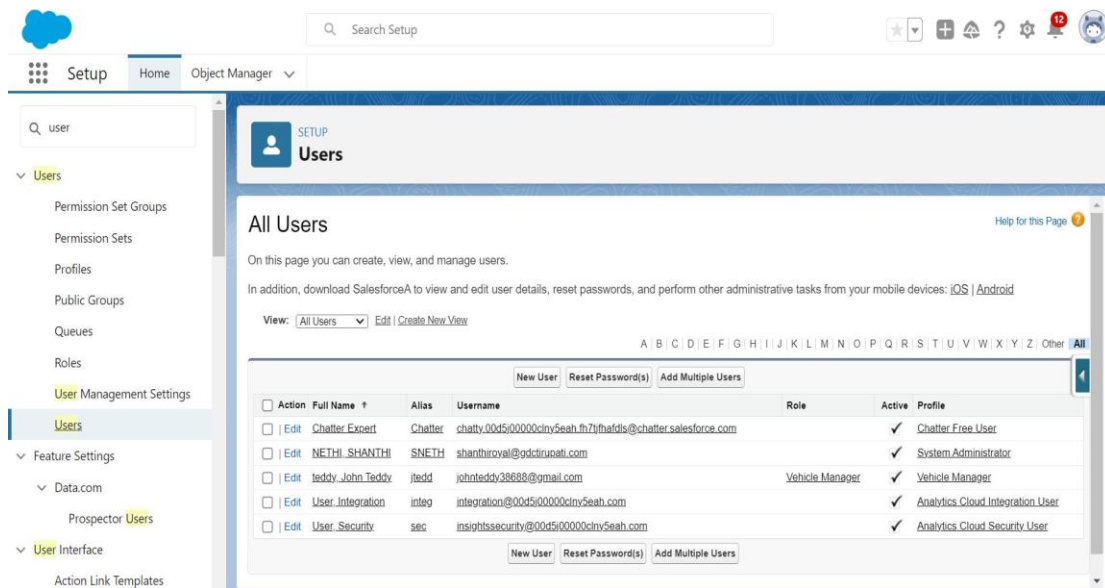
- ❖ Click on the Gear Icon
- ❖ Click "Setup"
  - ❖ In the Quick Find box, enter "Roles"
  - ❖ Click "Roles"
  - ❖ Click on "Set Up Roles"
  - ❖ Click "Expand All"
  - ❖ Under the CEO, click on "Add Role"
  - ❖ Fill up the Label as Vehicle Manager, Role Name Vehicle Manager.



## 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.

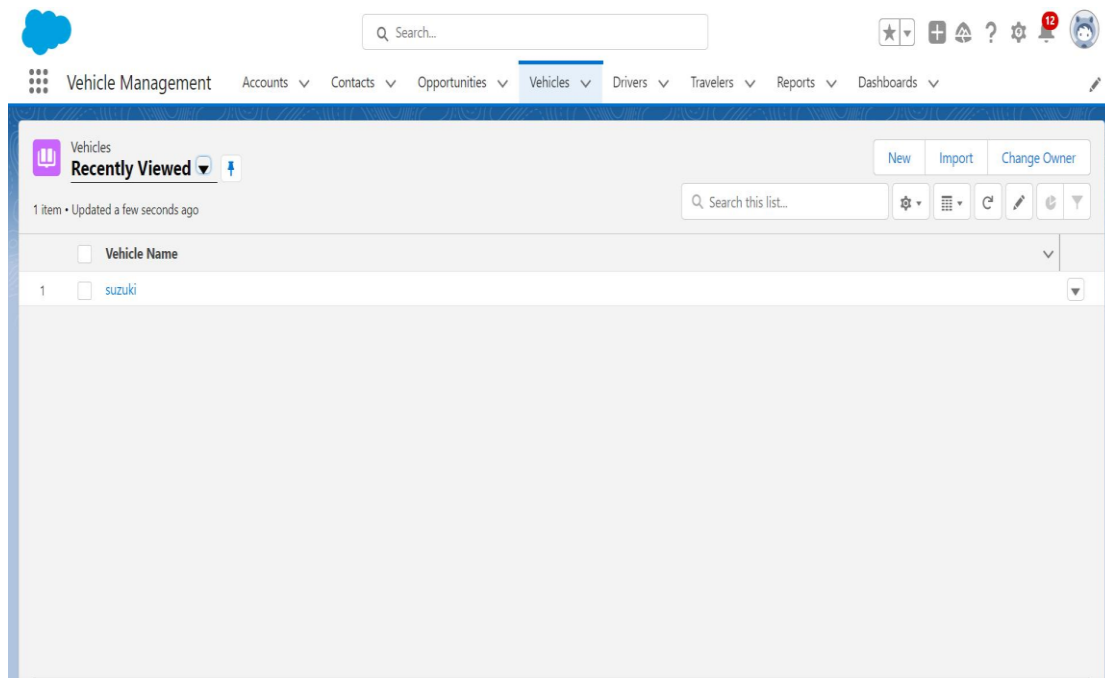


## 8.USERADPOTION:

### →Create Vehicle Record :

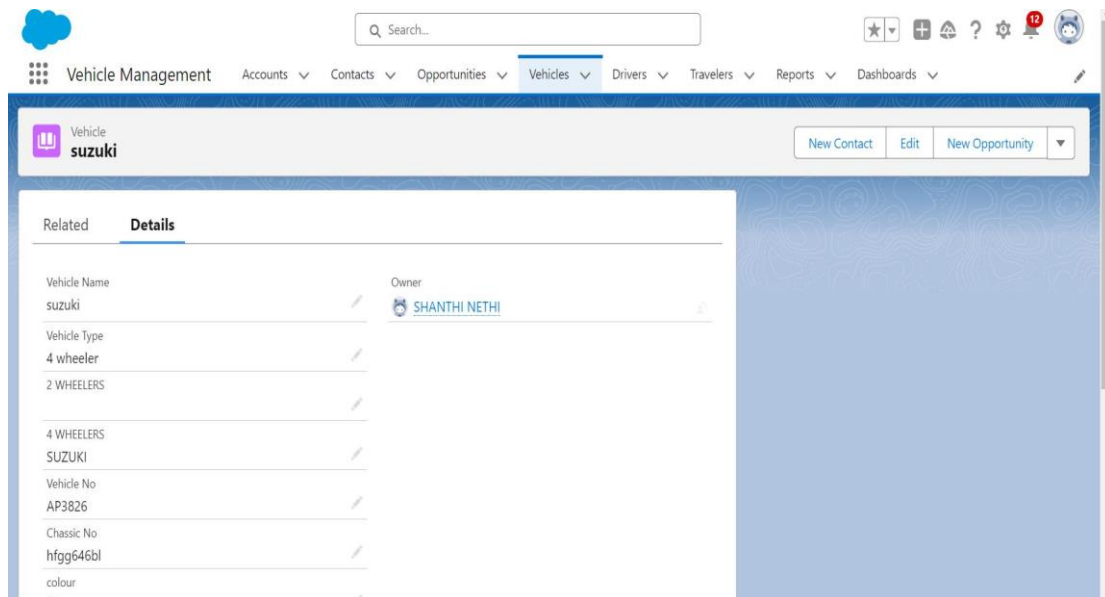
- ❖Click onApp Launcher on left side of screen.
- ❖Search Vehicle Management System & click on it.
- ❖Click on Vehicle tab.
- ❖Click new button
- ❖Fill all Vehicle record details.
- ❖Click on Save Button





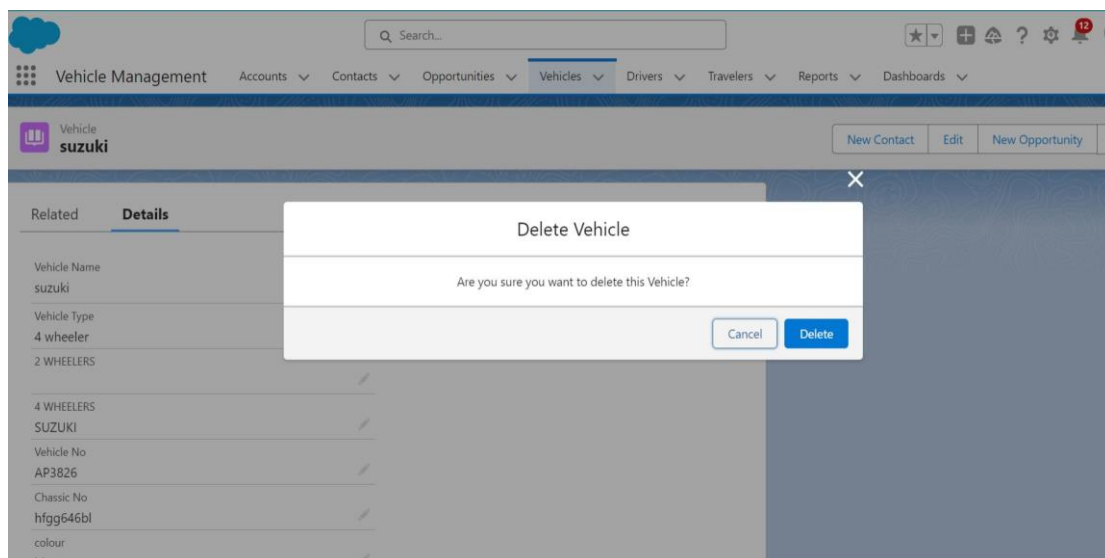
### →View Record (Vehicle) :

- ❖Click onApp 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.REPORTSAND 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 selectAll Opportunity.  
ClickApply.
- ❖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.

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

Reports

Recent

2 items

Search recent reports...

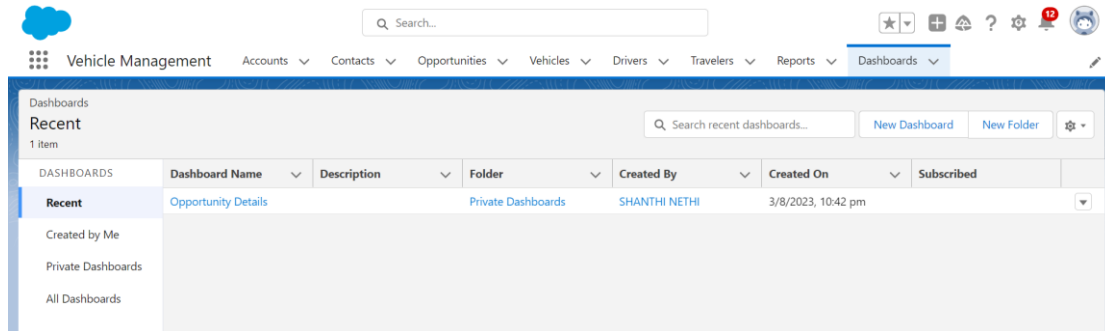
New Report New Folder

REPORTS	Report Name v	Description v	Folder v	Created By v	Created On v	Subscribed
Recent	Opportunity Details		Private Reports	SHANTHI NETHI	2/8/2023, 7:42 pm	
Created by Me	New Opportunity and Customer Report		Private Reports	SHANTHI NETHI	2/8/2023, 5:14 pm	
Private Reports						
Public Reports						

### →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

### → 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.



