

Project Report on

Vehicle Management System using salesforce

1. Creating Developer Account

Creating a developer org in salesforce.

- Go to developers.salesforce.com/
- Click on sign up.
- On the sign up form, enter the following details :
- First name & Last name -Reddy & deepika
- Email - reddydeepikamustoor@gmail.com
- Role : Developer
- Company : College Name – Gayatri degree college - Tirupati
- County : India
- Postal Code : pin code -517501
- Username : reddydeepikamustoor@gdctirupati.com

2. To Create An Object

Custom objects: Vehicle, Driver, Traveler.

The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with icons for Setup, Home, and Object Manager. Below that is a search bar labeled "Search Setup". The main area has a title "Object Manager" with a subtitle "50+ Items, Sorted by Last Modified". There are buttons for "Schema Builder" and "Create". A table lists the objects:

| LABEL | API NAME | TYPE | DESCRIPTION | LAST MODIFIED | DEPLOYED |
|----------|------------|---------------|-------------|---------------|----------|
| Vehicle | Vehicle_c | Custom Object | | 26/07/2023 | ✓ |
| Traveler | Traveler_c | Custom Object | | 26/07/2023 | ✓ |
| Driver | Driver_c | Custom Object | | 26/07/2023 | ✓ |

3. Fields And Relationship

Create a dependency between these two picklists, so that when a Vehicle type is selected, only respective 2Wheeler Brands are available in the 2Wheeler field, similarly for 4Wheelers.

The below steps will assist you in creating Field Dependencies.

- Click on the gear icon and then select Setup.
- Click on the object manager tab just beside the home tab.
- After the above steps, Select Vehicles Object
- Now Select Fields and relationships from setup menu of the vehicle object.
- Click Field Dependencies.
- Click New.

- Select Vehicle Type as the Controlling Field and select 2wheelers as the Dependent Field.
- Click Continue.
- Select the appropriate 2 wheelers Brands in each column by double-clicking them.

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|-------------|---------------|--------------|-------------------|---------|
| 2WHEELERS | X2WHE__c | Picklist | Vehicle Type | |
| 4WHEELERS | X4WHEELERS__c | Picklist | Vehicle Type | |
| Body Type | Body_Type__c | Text(20) | | |
| Chassis No | Chassis_No__c | Text(30) | | |
| Colour No | Colour_No__c | Text(20) | | |
| Condition | Condition__c | Picklist | | |
| Created By | CreatedBy | Lookup(User) | | |

Fields In Driver Objects Follow Below Data Types

| S No | Field | Type | Data Type |
|------|---------------|----------|------------------|
| 1 | Driver Name | Standard | Text |
| 2 | License No | Custom | Text (30) |
| 3 | Mobile No | Custom | Phone |
| 4 | Fair Per Hour | Custom | Text (10) |
| 5 | Vehicle | Custom | Lookup (Vehicle) |

The screenshot shows the Salesforce Object Manager interface for the 'Driver' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main area displays the 'Fields & Relationships' section for the Driver object. 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) | | ✓ |
| Last Modified By | LastModifiedById | Lookup(User) | | |
| Owner | OwnerId | Lookup(User,Group) | | ✓ |

Fields In Traveler Objects Follow Below Data Types

| S No | Field | Type | Data Type |
|------|---------------------|----------|-----------|
| 1 | Traveler Name | Standard | Text |
| 2 | Traveler Contact No | Custom | Phone |
| 3. | Traveler Email | Custom | Email |

The screenshot shows the Salesforce Object Manager interface for the 'Traveler' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main area displays the 'Fields & Relationships' section for the Traveler object. 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 Follow Below Data Types

| S No | Field | Type | Data Type |
|------|--------------------|--------|---------------------|
| 1 | Vehicle | Custom | Lookup (Vehicle) |
| 2 | Journey Start Date | Custom | Date/Time |
| 3 | Journey End Date | Custom | Date/Time |
| 4 | Total Fair | Custom | Currency (8) |
| 5 | Route | Custom | Text(long) |

The screenshot shows the Salesforce Object Manager interface for the Opportunity object. The left sidebar has a 'Fields & Relationships' section selected. The main content area displays a table of fields with their labels and types. The fields listed are:

| Field Label | Field Name | Type |
|--------------------|-----------------------|--------------|
| Journey End Date | Journey_End_Date__c | Date/Time |
| Journey Start Date | Journey_Start_Date__c | Date/Time |
| Last Modified By | LastModifiedBy | 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) |

4. Organize Opportunity Layout

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

5. 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.

The screenshot shows the Salesforce Vehicle Management interface. At the top, there's a navigation bar with links for Accounts, Contacts, Opportunities, Vehicles, Drivers, Travelers, Reports, and Dashboards. Below the navigation bar is a search bar and a toolbar with various icons. The main content area is titled 'Accounts' and 'Recently Viewed'. It displays a message stating '0 items • Updated a few seconds ago' and 'You haven't viewed any Accounts recently. Try switching list views.' There are also buttons for 'New' and 'Import'.

6. Creating A Profile

Creating a Profile: Now create a Vehicle Manager profile and set it's object permissions.

The screenshot shows the Salesforce Setup interface. The left sidebar has a 'Quick Find' box with 'pr' typed in, and sections for Hyperforce Assistant, Users (Profiles selected), Data, Feature Settings, Data.com, Marketing, and Sales. The main content area is titled 'Profiles' under 'SETUP'. It shows a table with one row for 'Vehicle_Manager'. The table columns are 'Action', 'Profile Name', 'User License', and 'Custom'. The 'Profile Name' column shows 'Vehicle_Manager', 'User License' shows 'Salesforce', and 'Custom' has a checked checkbox. There are also 'Edit' and 'Delete' buttons for the row.

7. 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
- Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.
- Click On Save.
- User will receive an email to reset password.
- Once user will finish it, would be able to login and use the system.

All Users

On this page you can create, view, and manage users.

In addition, download Salesforce@ to view and edit user details, reset passwords, and perform other administrative tasks from your mobile devices: [iOS](#) | [Android](#)

| Action | Full Name | Alias | Username | Role | Active | Profile |
|---|------------------|--------|---|-----------------|-------------------------------------|----------------------------------|
| <input type="checkbox"/> Edit | 1_operator | o1 | operator1111@gmail.com | Vehicle Manager | <input checked="" type="checkbox"/> | Standard Platform User |
| <input type="checkbox"/> Edit | 2_operator | o2 | operator2222@gmail.com | Vehicle Manager | <input checked="" type="checkbox"/> | Standard Platform User |
| <input type="checkbox"/> Edit | Chatter Expert | | chatty_00d5f0000c9nelean.uzncovizfyb9i@chatter.salesforce.com | | <input checked="" type="checkbox"/> | Chatter Free User |
| <input type="checkbox"/> Edit | mustoor_deeptika | dmust | reddydeeptikamustoor@odctraining.com | | <input checked="" type="checkbox"/> | System Administrator |
| <input type="checkbox"/> Edit | Teddy_John | jteddy | johnteddy@22@gmail.com | Vehicle Manager | <input checked="" type="checkbox"/> | Vehicle Manager |
| <input type="checkbox"/> Edit | User_Integration | integ | integration@00d5f0000c9nelean.com | | <input checked="" type="checkbox"/> | Analytics Cloud Integration User |
| <input type="checkbox"/> Edit | User_Security | sec | insightsecurity@00d5f0000c9nelean.com | | <input checked="" type="checkbox"/> | Analytics Cloud Security User |

8. User Adoption

Create Vehicle Record

Vehicles

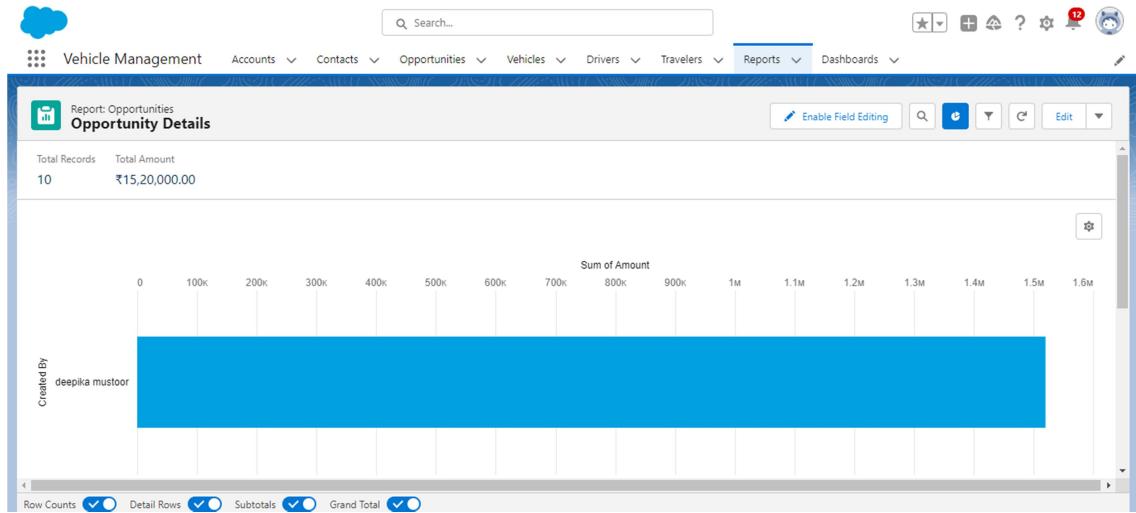
Recently Viewed

6 items • Updated a few seconds ago

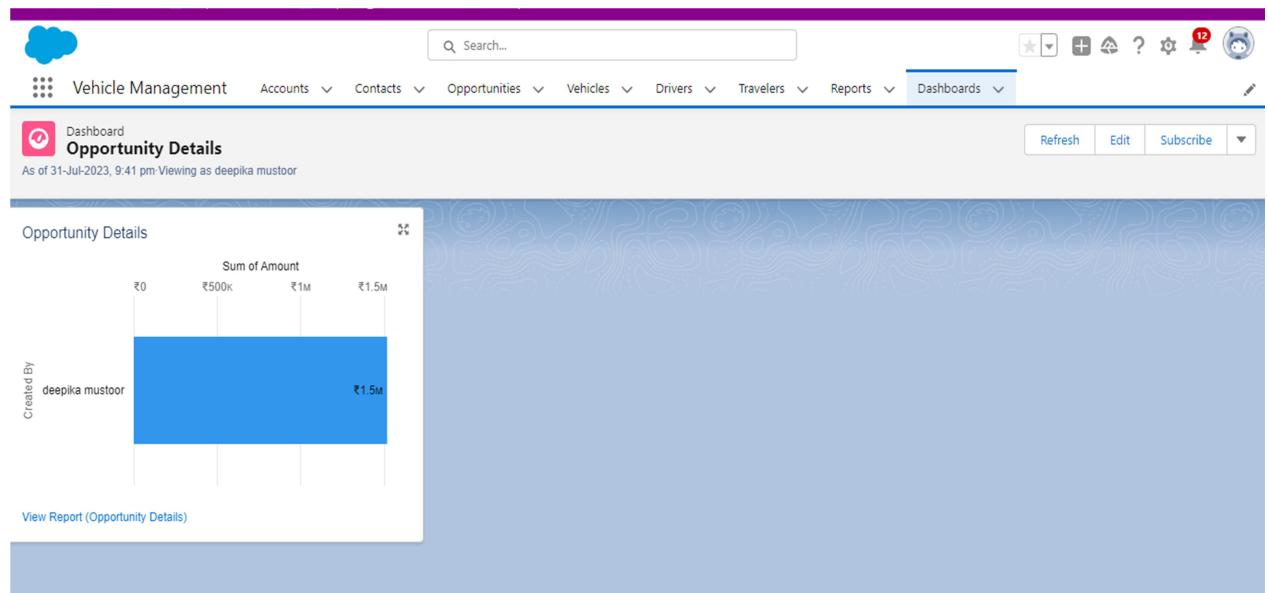
| Vehicle Name |
|--------------|
| 1 tvs |
| 2 hyundai |
| 3 honda |
| 4 ola |
| 5 java |
| 6 Activa |

9. Report & Dashboards

- 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.



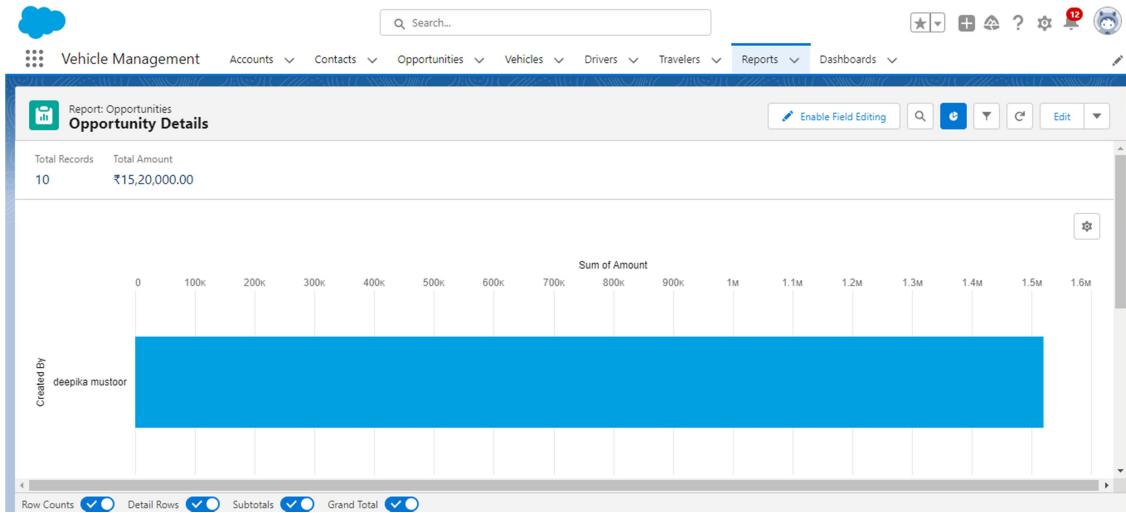
Create Dashboard



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 records

