

Implementing Vehicle Management System Using Salesforce

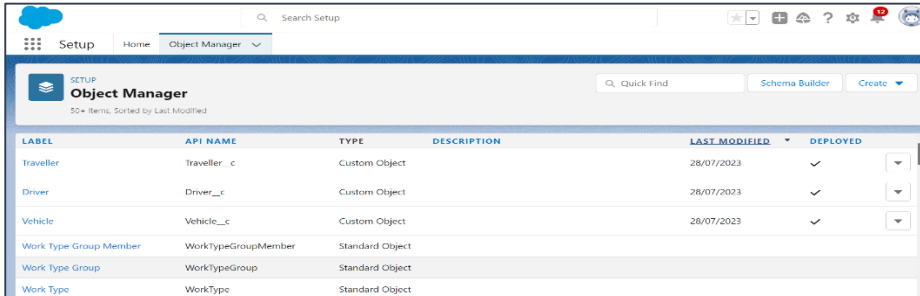
Project Report

Creating a developer org in salesforce :

- Go to developers.salesforce.com/signup
- Click on sign up.
- On the sign-up form, enter the following details:
- First name & Last name - Ex: ujwala & thokala
- Email - ujwalathokala@gmail.com
- Role: Developer
- Company: College Name - GAYATRI DEGREE COLLEGE - TIRUPATI
- County: India
- Postal Code: pin code - 517501
- Username: should be a combination of your name and company – ujju05052000@gdctirupati.com

Create an Object:

I am Creating 3 Objects-vehicle, driver, traveller.



The screenshot shows the Salesforce Setup interface, specifically the Object Manager page. The page displays a list of objects with columns for Label, API Name, Type, Description, Last Modified, and Deployed. The objects listed are Traveller, Driver, and Vehicle, all of which are Custom Objects. Below these, there are also standard objects like Work Type Group Member, Work Type Group, and Work Type.


LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Traveller	Traveller__c	Custom Object		28/07/2023	✓
Driver	Driver__c	Custom Object		28/07/2023	✓
Vehicle	Vehicle__c	Custom Object		28/07/2023	✓
Work Type Group Member	WorkTypeGroupMember	Standard Object			
Work Type Group	WorkTypeGroup	Standard Object			
Work Type	WorkType	Standard Object			

Creating the Following Fields & Relationships : An object Relationship in salesforce is a two way Association between two objects.








Fields in vehicle object : Creating 12 fields in Vehicle object

S NO.	Field Names	Type	Data Types
1.	Vehicle Name	Standard	Text
2.	Vehicle Type i)2 wheeler ii)4 wheeler	Custom	Picklist
3.	2WHEELERS i) HERO ii) HONDA iii) BAJAJ iv) ROYAL ENFIELD v) TVS vi) KINETIC vii) OLA viii) JAWA ix) SD x) BATTERY	Custom	Picklist
4.	4WHEELERS i) RENAULT ii) SKODA iii) HONDA iv) HYUNDAI v) SUZUKI	Custom	Picklist
	vi) MAHINDRA vii) VOLVO viii) AUDI ix) Volkswagen		

5.	Vehicle No	Custom	Text (20)
6.	Chassis No	Custom	Text (30)
7.	Colour	Custom	Text (20)
8.	Body Type	Custom	Text (20)
9.	Vehicle Includes • Fire Extinguisher • First Aid Kit • Multi • Charger kit • Stepney • Stereo • Tool Kit • Tracking Device • Tyre • Jack	Custom	Multi Picklist
10.	Condition i) Good ii) Medium iii) Least	Custom	Picklist
11.	Mileage	Custom	Text (3)
12.	Seats	Custom	Number (2)



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Vehicle

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits


Fields & Relationships

16 Items, Sorted by Field Label








Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
2 Wheeler	X2_Wheeler__c	Picklist	Vehicle Type	
4 WHEELER	X4_WHEELER__c	Picklist	Vehicle Type	
Body Type	Body_Type__c	Text(20)		
Classic No	Classic_No__c	Text(30)		



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Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

Colour	Colour__c	Text(20)		
Condition	Condition__c	Picklist		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Mileage	Mileage__c	Text(3)		



Search Setup



SetupHomeObject Manager

SETUP > OBJECT MANAGER

Vehicle

Details

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16 Items, Sorted by Field Label

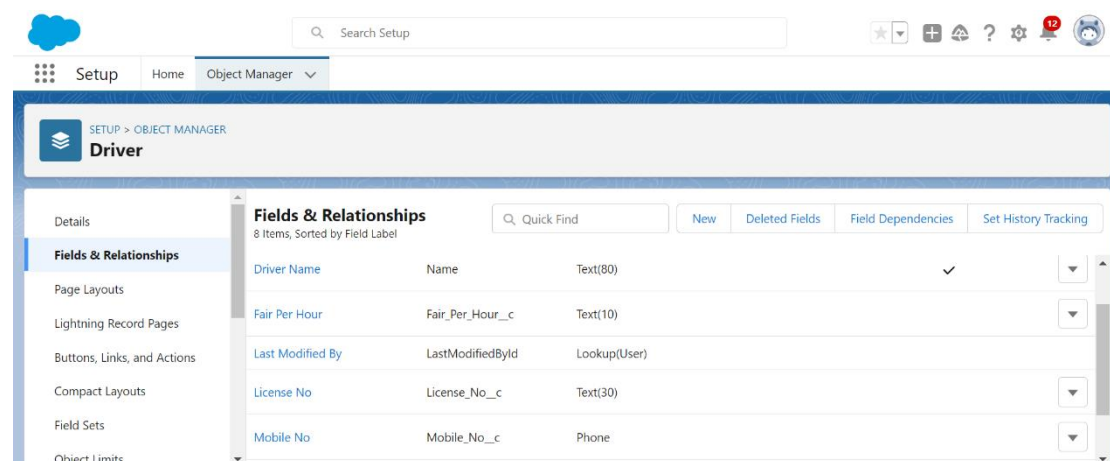
Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

Owner	OwnerId	Lookup(User,Group)		✓
Seats	Seats__c	Number(2, 0)		
Vehicle	Vehicle__c	Lookup(Vehicle)		✓
Vehicle Includes	Vehicle_Includes__c	Picklist (Multi-Select)		
Vehicle Name	Name	Text(80)		✓

Fields in Driver Object : Creating 5 fields in Driver Object.

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 Setup interface. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The main navigation menu on the left includes Setup, Home, and Object Manager. The Object Manager page is selected, showing the 'Driver' object. The 'Fields & Relationships' section is active, displaying a list of 8 items sorted by Field Label. The list includes: 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)), and Mobile No (Mobile_No__c, Phone). The interface also includes a 'Quick Find' search bar and tabs for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'.

Fields in Traveller Object : Creating 3 fields in Traveller object.

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

Setup Home Object Manager

SETUP > OBJECT MANAGER
Traveller

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits

Fields & Relationships
6 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Field Label	Field Name	Data Type	Relationships
Last Modified By	LastModifiedById	Lookup(User)	
Owner	OwnerId	Lookup(User,Group)	✓
Traveller Contact No	Traveller_Contact_No__c	Phone	
Traveller Email	Traveller_Email__c	Email	
Traveller Name	Name	Text(80)	✓

Fields in Opportunity Objects : Creating 5 fields in opportunity objects.

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)

Setup Home Object Manager

SETUP > OBJECT MANAGER
Opportunity

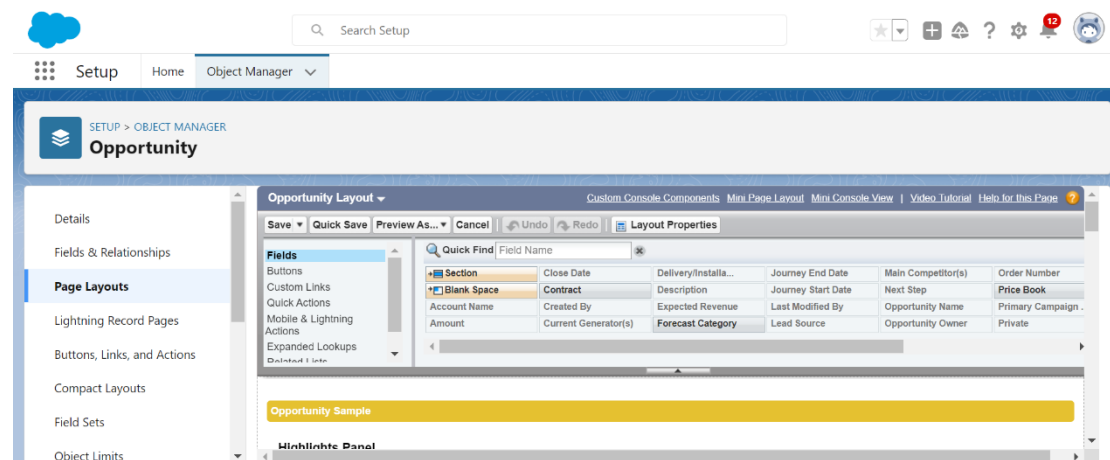
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits

Fields & Relationships
31 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

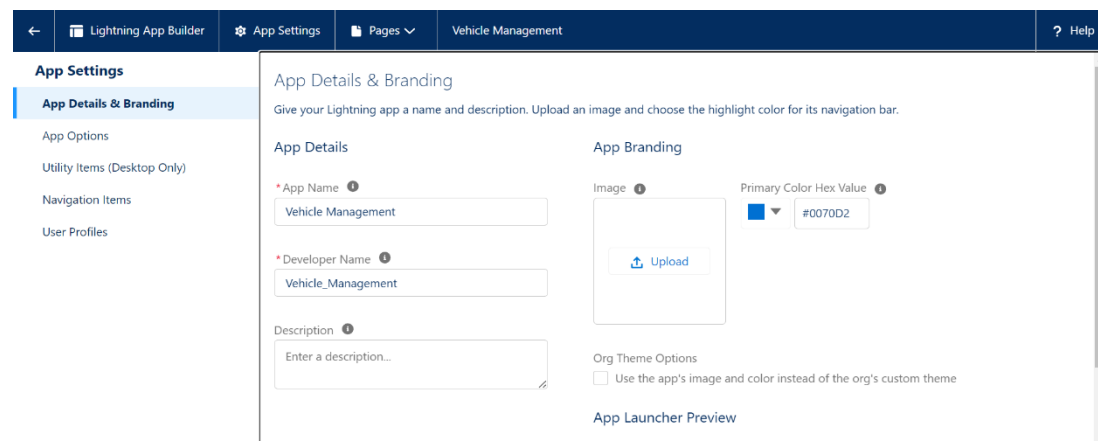
Field Label	Field Name	Data Type	Relationships
Journey End Date	Journey_End_Date__c	Date/Time	
Journey Start Date	Journey_Start_Date__c	Date/Time	
Last Modified By	LastModifiedById	Lookup(User)	
Lead Source	LeadSource	Picklist	
Main Competitor(s)	MainCompetitors__c	Text(100)	

Page Layout : We Can Organize Page Layout by Adding or Removing by Dragging & Dropping.



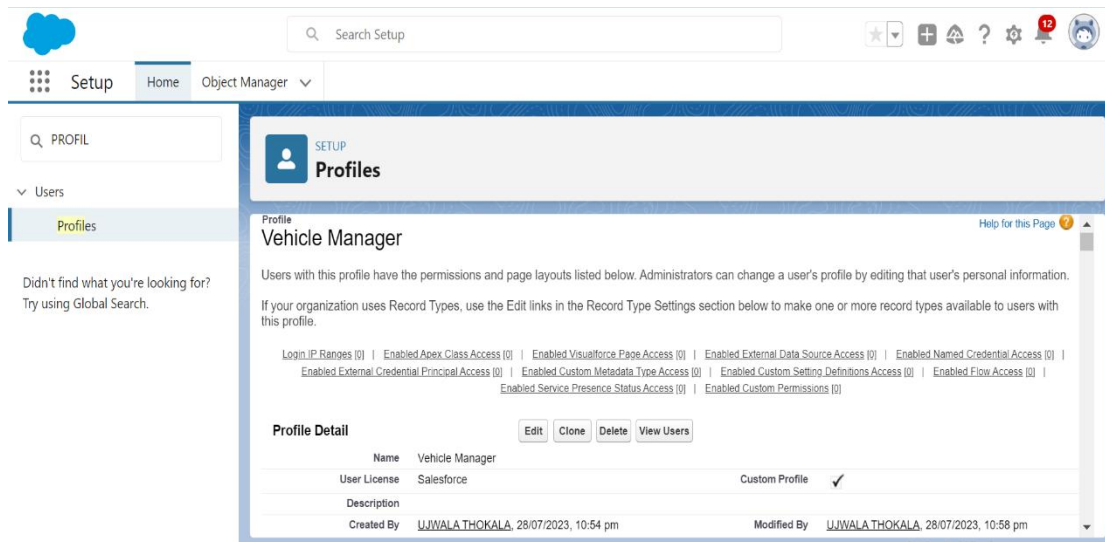
Lightning App : Apps in Salesforce are a Group of Tabs That Help The Application Function by Working Together as a Unit.

Creating Lightning App : The Creating Vehicle Management App Using Lightning Experience App Manager by Clicking New Lightning App in App Manager.



Profile : A profile is a Group of Settings and Permissions that Define What a User Can do in Salesforce.

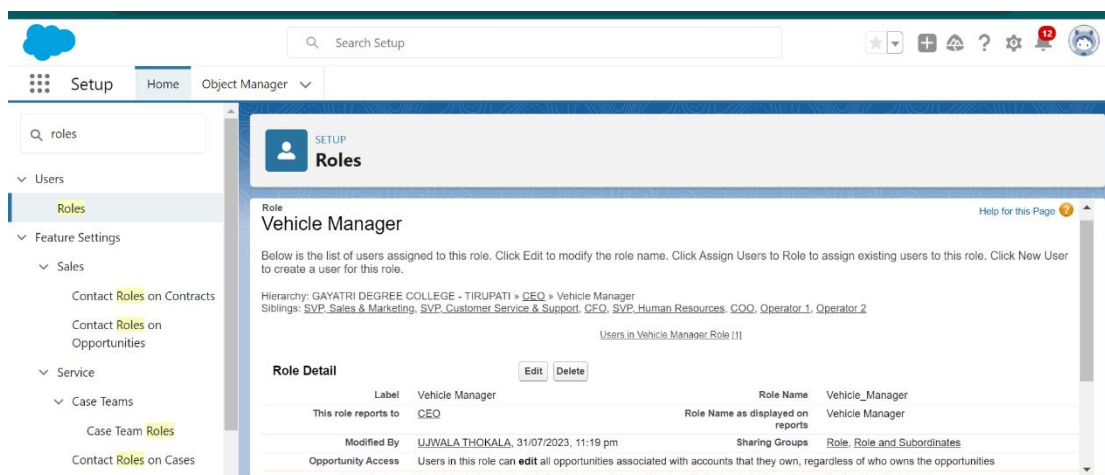
Creating a Profile : Creating a Profile by Typing Profiles on Quick Tab and then by clicking Standard user in Profile and Then click Clone and enter profile Name as Vehicle Manager and Click Save.



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "PROFIL" entered and a list of items including "Users" and "Profiles". The main content area is titled "SETUP Profiles" and shows the "Vehicle Manager" profile. It includes a list of enabled permissions such as "Login IP Ranges", "Apex Class Access", "Visualforce Page Access", etc. Below this is a "Profile Detail" table.

Profile Detail		Edit	Clone	Delete	View Users
Name	Vehicle Manager				
User License	Salesforce				Custom Profile <input checked="" type="checkbox"/>
Description					
Created By	UJWALA THOKALA, 28/07/2023, 10:54 pm				Modified By UJWALA THOKALA, 28/07/2023, 10:58 pm

Creating Setup Roles :

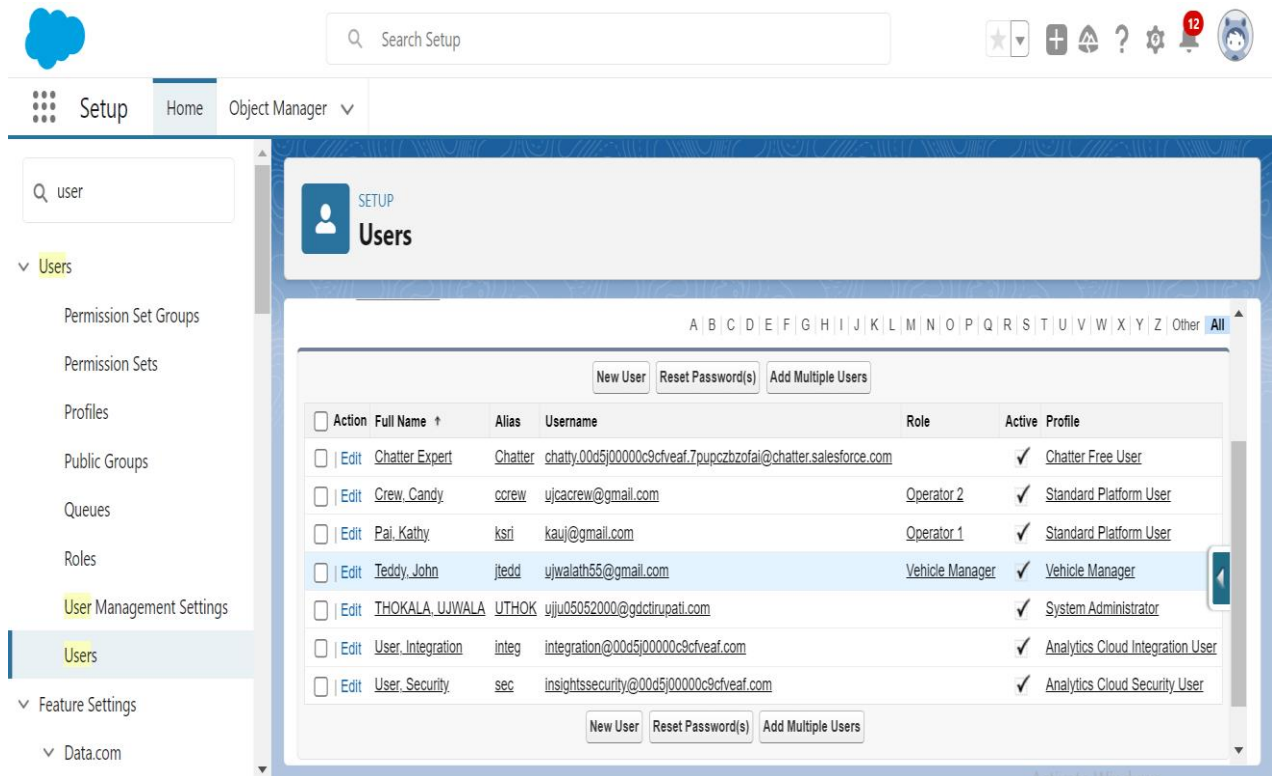


The screenshot shows the Salesforce Setup interface for the "Roles" section. The left sidebar has a search bar with "roles" entered and a list of items including "Users", "Roles", and "Feature Settings". The main content area is titled "SETUP Roles" and shows the "Vehicle Manager" role. It includes a hierarchy: "GAYATRI DEGREE COLLEGE - TIRUPATI > CEO > Vehicle Manager". Below this is a "Role Detail" table.

Role Detail		Edit	Delete
Label	Vehicle Manager		
This role reports to	CEO		
Modified By	UJWALA THOKALA, 31/07/2023, 11:19 pm		
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Role Name	Vehicle_Manager		
Role Name as displayed on reports	Vehicle Manager		
Sharing Groups	Role, Role and Subordinates		

Users : A User is any one who Logs into Salesforce. Users are Employees at your Company who need access to the Company's Records.

Creating a users name john teddy and e-mail and unique user name in form of e-mail address and click save.

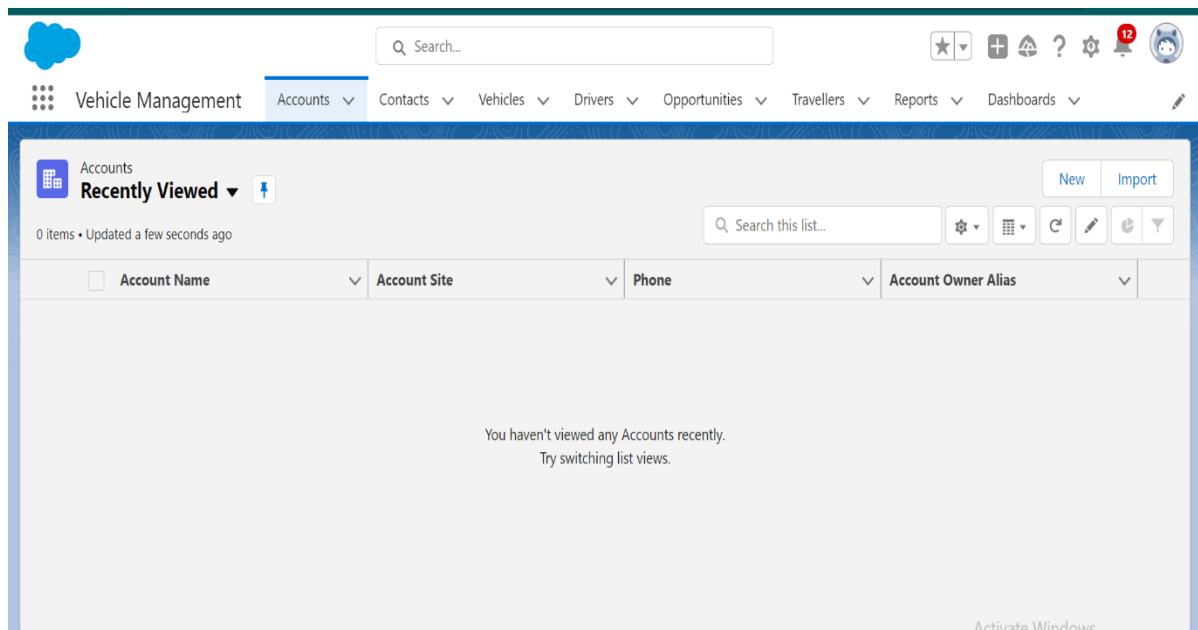


The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'user' and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings (highlighted), Users (highlighted), Feature Settings, and Data.com. The main content area is titled 'Users' and displays a table of system users. Above the table are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The 'Vehicle Manager' user is highlighted in blue.

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty.00d5j00000c9cfveaf.7pupczbzofai@chatter.salesforce.com		✓	Chatter Free User
Edit	Crew, Candy	ccrew	ujcacreu@gmail.com	Operator 2	✓	Standard Platform User
Edit	Pai, Kathy	ksri	kauji@gmail.com	Operator 1	✓	Standard Platform User
Edit	Teddy, John	jtedd	ujwalath55@gmail.com	Vehicle Manager	✓	Vehicle Manager
Edit	THOKALA, UJWALA	UTHOK	ujju05052000@gdctirupati.com		✓	System Administrator
Edit	User, Integration	integ	integration@00d5j00000c9cfveaf.com		✓	Analytics Cloud Integration User
Edit	User, Security	sec	insightssecurity@00d5j00000c9cfveaf.com		✓	Analytics Cloud Security User

User Adoption : We need to Understand User Adoption and Navigation how to interact with DataBase.

Create Vehicle Record:



The screenshot shows the Salesforce Vehicle Management interface. The left sidebar contains a search bar and a list of navigation items: Accounts, Contacts, Vehicles, Drivers, Opportunities, Travellers, Reports, and Dashboards. The main content area is titled 'Accounts' and displays a 'Recently Viewed' section. Above the list are buttons for 'New' and 'Import'. The list is currently empty, showing a message: 'You haven't viewed any Accounts recently. Try switching list views.'

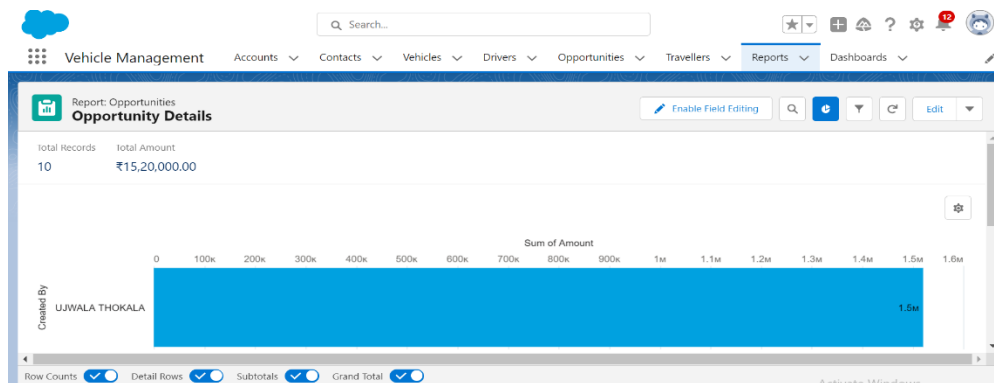
View Vehicle Record:


The screenshot shows the Salesforce interface for Vehicle Management. The top navigation bar includes a search bar and various utility icons. The main menu is open, highlighting the 'Vehicles' tab. Below the menu, the 'Vehicles' section is titled 'Recently Viewed' with a dropdown arrow and a user icon. It indicates '5 items • Updated a few seconds ago'. A search bar for the list is present, along with icons for settings, table view, refresh, edit, and filter. The table lists five vehicles:

	<input type="checkbox"/> Vehicle Name	
1	<input type="checkbox"/> Mini Van	▼
2	<input type="checkbox"/> Bike	▼
3	<input type="checkbox"/> Jeep	▼
4	<input type="checkbox"/> Car	▼
5	<input type="checkbox"/> Scooty	▼

Reports and Dashboards: A Report is a List of Records that meet the Criteria you Define it's Displayed in Salesforce in Rows and Columns, and Can be Filtered, Grouped, or Displayed in a Graphical Chart .

Creating of Reports:





Vehicle Management

Accounts

Contacts

Vehicles

Drivers

Opportunities

Travellers

Reports

Dashboards

Report: Opportunities

Enable Field Editing

Created By	Account Name	Opportunity Name	Amount
UJWALA THOKALA (10)	GenePoint	GenePoint Lab Generators	₹60,000.00
	GenePoint	GenePoint SLA	₹30,000.00
	Edge Communications	Edge Emergency Generator	₹75,000.00
	Edge Communications	Edge Emergency Generator	₹35,000.00
	Grand Hotels & Resorts Ltd	Grand Hotels Emergency Generators	₹2,10,000.00
	Grand Hotels & Resorts Ltd	Grand Hotels Generator Installations	₹3,50,000.00
	Grand Hotels & Resorts Ltd	Grand Hotels Guest Portable Generators	₹2,50,000.00
	United Oil & Gas Corp.	United Oil Refinery Generators	₹2,70,000.00
	United Oil & Gas Corp.	United Oil SLA	₹1,20,000.00
	United Oil & Gas Corp.	United Oil Standby Generators	₹1,20,000.00

Row Counts
Detail Rows
Subtotals
Grand Total

Activate Windows
Go to Settings to activate Windows.

Creating of Dashboards :

