

Project Report on

Vehicle Management System using salesforce

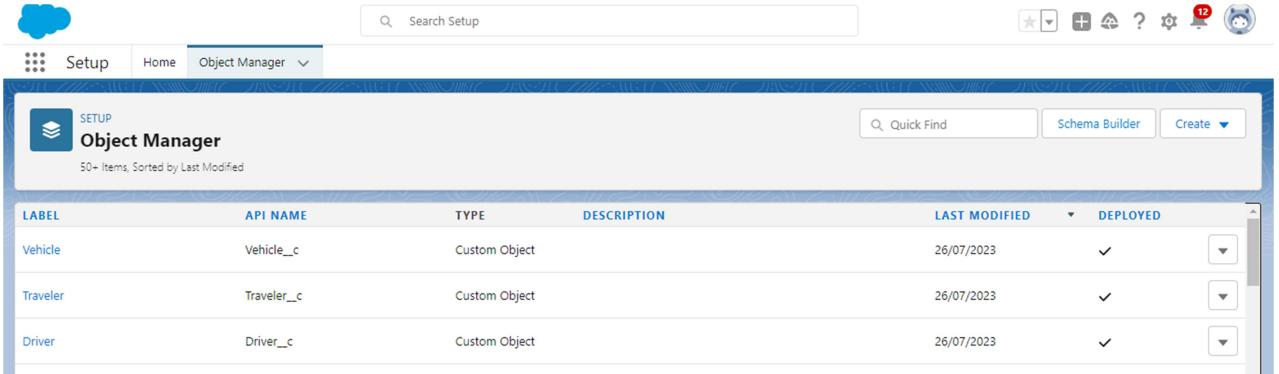
1. Creating Developer Account

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 Home, Object Manager, and Setup. The main title is "Object Manager" with a subtitle "50+ Items, Sorted by Last Modified". Below the title is a search bar labeled "Quick Find" and a "Schema Builder" button. A "Create" button is also visible. The main area displays a table with three rows of data:

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 is a search bar and a toolbar with various icons. The main content area is titled 'Accounts Recently Viewed'. It displays a table with columns for Account Name, Account Site, Phone, and Account Owner Alias. A message at the bottom states, 'You haven't viewed any Accounts recently. Try switching list views.'

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 and sections for Hyperforce Assistant, Users (with 'Profiles' selected), Data, Feature Settings, Data.com, Marketing, and Sales. The main content area is titled 'Profiles' under 'SETUP'. It shows a table with columns for Action, Profile Name, User License, and Custom. There is one entry: 'Edit | Del | ... Vehicle_Manager' with User License set to 'Salesforce' and Custom checked. Navigation links at the bottom include A, B, C, D, E, F, G, H, I, J, K, L, M, N, O, P, Q, R, S, T, U, V, W, X, Y, Z, Other, and All.

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	teddy	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.

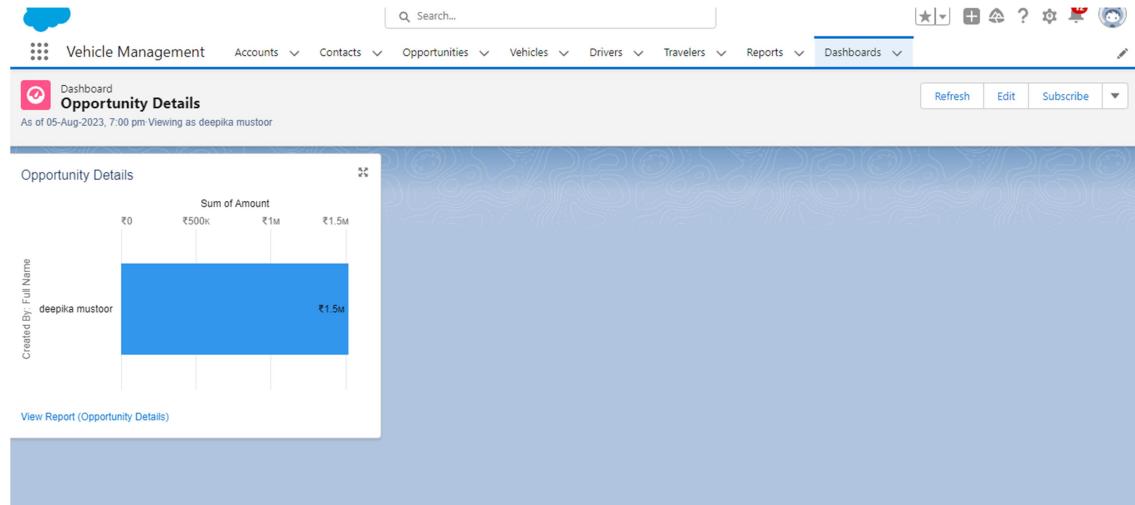
Report: Opportunity and Customer Name
Opportunity Details

Total Records Total Amount
10 ₹15,20,000.00

Created By: Full Name	Opportunity ID	Journey Start Date	Journey End Date	Close Date	Opportunity Name	Route	Amount	Account Name: Account Name
deepika mustoor (10)	0065/00001/QyaM	-	-	12/07/2023	United Oil SLA	-	₹1,20,000.00	United Oil & Gas Corp.
	0065/00001/QyaP	-	-	05/07/2023	United Oil Refinery Generators	-	₹2,70,000.00	United Oil & Gas Corp.
	0065/00001/QyaS	-	-	20/07/2023	Grand Hotels Guest Portable Generators	-	₹2,50,000.00	Grand Hotels & Resorts Ltd
	0065/00001/QyaT	-	-	20/07/2023	Edge Emergency Generator	-	₹75,000.00	Edge Communications
	0065/00001/Qybab	-	-	03/07/2023	Grand Hotels Generator Installations	-	₹3,50,000.00	Grand Hotels & Resorts Ltd
	0065/00001/Qyak	-	-	01/07/2023	Grand Hotels Emergency Generators	-	₹2,10,000.00	Grand Hotels & Resorts Ltd
	0065/00001/Qyam	-	-	26/07/2023	Edge Emergency Generator	-	₹35,000.00	Edge Communications
	0065/00001/Qyan	-	-	13/07/2023	United Oil Standby Generators	-	₹1,20,000.00	United Oil & Gas Corp.
	0065/00001/Qyao	-	-	14/07/2023	GenePoint Lab Generators	-	₹60,000.00	GenePoint
	0065/00001/Qyap	-	-	17/07/2023	GenePoint SLA	-	₹30,000.00	GenePoint

Subtotal Row Counts Detail Rows Subtotals Grand Total

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

Report: Opportunity and Customer Name
Opportunity Details

Total Records: 10 Total Amount: ₹15,20,000.00

Created By: Full Name	Opportunity ID	Journey Start Date	Journey End Date	Close Date	Opportunity Name	Route	Amount	Account Name: Account Name
deepika mustoor (10)	0065j00001QyaM	-	-	12/07/2023	United Oil SLA	-	₹1,20,000.00	United Oil & Gas Corp.
	0065j00001QyaP	-	-	05/07/2023	United Oil Refinery Generators	-	₹2,70,000.00	United Oil & Gas Corp.
	0065j00001QyaS	-	-	20/07/2023	Grand Hotels Guest Portable Generators	-	₹2,50,000.00	Grand Hotels & Resorts Ltd
	0065j00001QyaT	-	-	20/07/2023	Edge Emergency Generator	-	₹75,000.00	Edge Communications
	0065j00001Qyb	-	-	03/07/2023	Grand Hotels Generator Installations	-	₹3,50,000.00	Grand Hotels & Resorts Ltd
	0065j00001Qyak	-	-	01/07/2023	Grand Hotels Emergency Generators	-	₹2,10,000.00	Grand Hotels & Resorts Ltd
	0065j00001Qyam	-	-	26/07/2023	Edge Emergency Generator	-	₹35,000.00	Edge Communications
	0065j00001Qyan	-	-	13/07/2023	United Oil Standby Generators	-	₹1,20,000.00	United Oil & Gas Corp.
	0065j00001Qyao	-	-	14/07/2023	GenePoint Lab Generators	-	₹60,000.00	GenePoint
	0065j00001Qyap	-	-	17/07/2023	GenePoint SLA	-	₹30,000.00	GenePoint

Subtotal: Row Counts Detail Rows Subtotals Grand Total

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

