

Implementing Vehicle Management System Using Salesforce

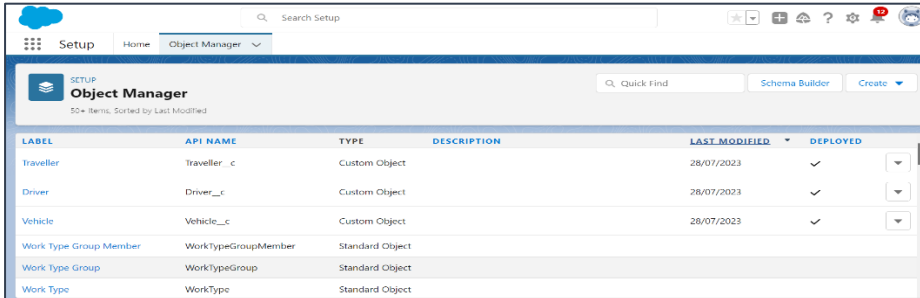
Project Report

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 vi) MAHINDRA vii) VOLVO viii) AUDI ix) Volkswagen	Custom	Picklist

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)

Setup

Home

Object 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

New
Deleted Fields
Field Dependencies
Set 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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16 Items, Sorted by Field Label

New
Deleted Fields
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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)		

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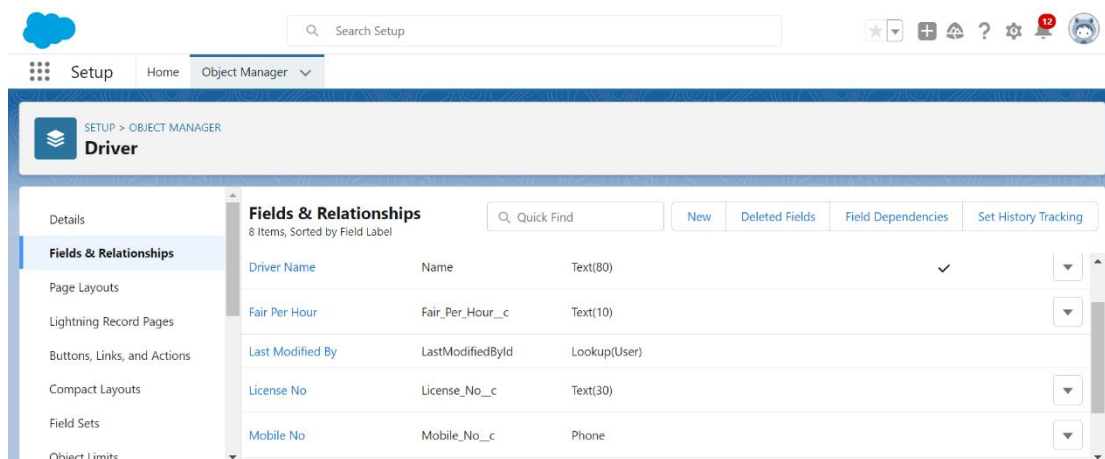
16 Items, Sorted by Field Label

New
Deleted Fields
Field Dependencies
Set 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)

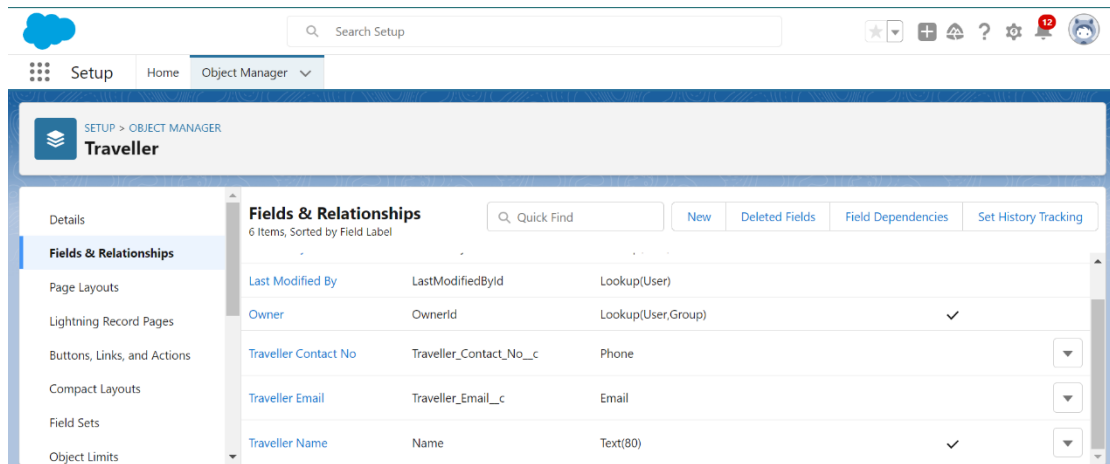


The screenshot shows the Salesforce Setup interface. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The main navigation menu on the left lists options like Setup, Home, and Object Manager. The 'Object Manager' section is expanded, showing a list of objects. The 'Driver' object is selected, and the 'Fields & Relationships' tab is active. This tab displays a list of 8 fields, sorted by Field Label. The fields listed are: 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). Each field entry includes a checkbox for activation and a dropdown for field type.

Field Label	Field Name	Data Type
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	Phone

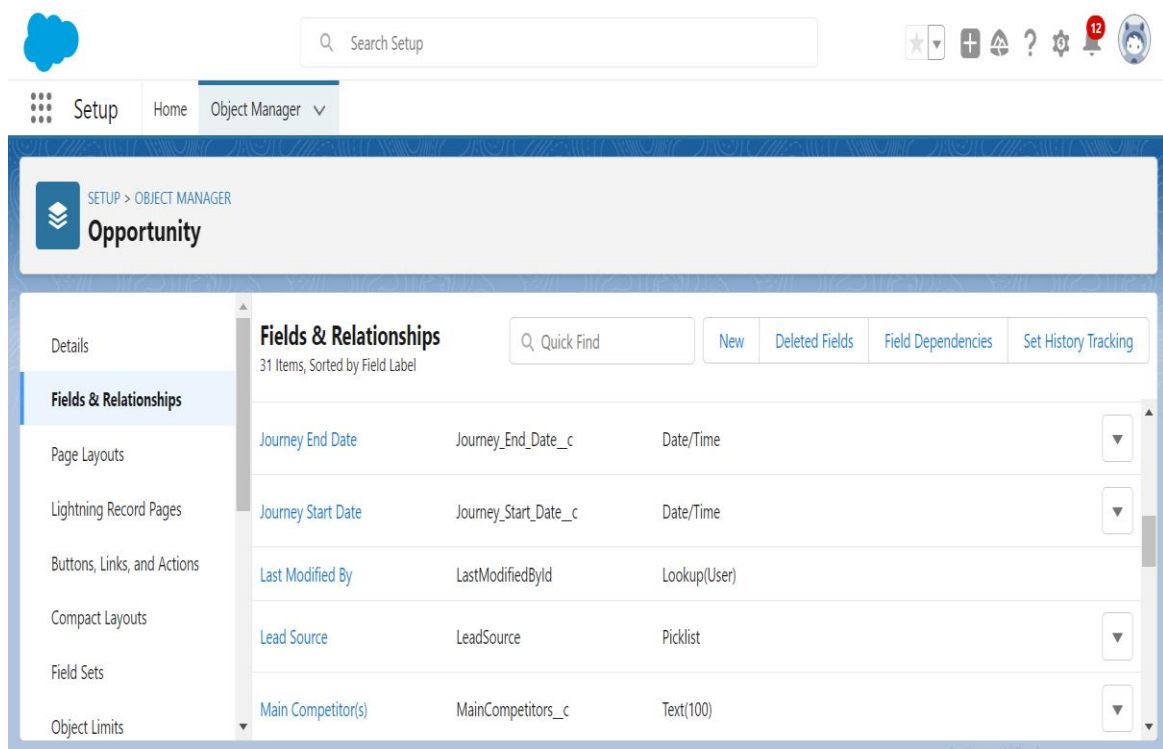
Fields in Traveller Object : Creating 3 fields in Traveller object.

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

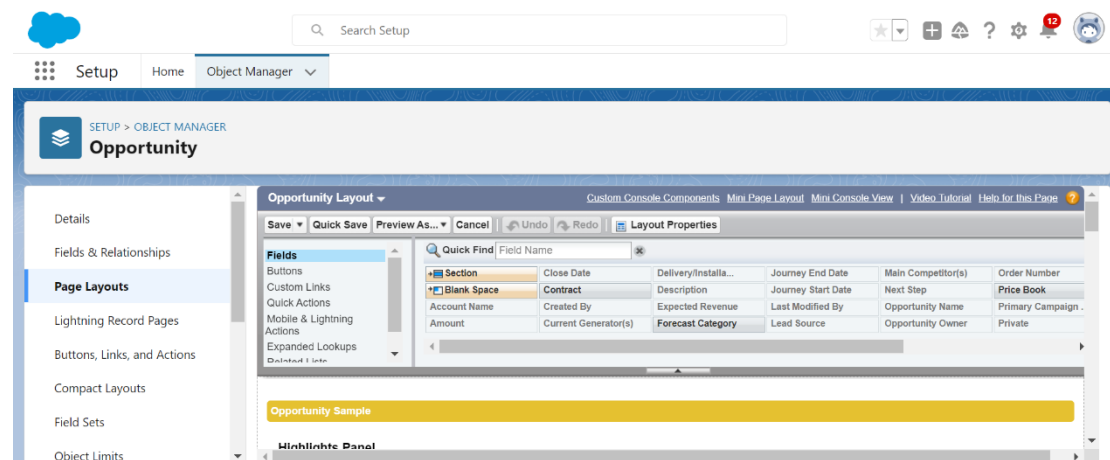


Fields in Opportunity Objects : Creating 5 fields in opportunity objects.

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)

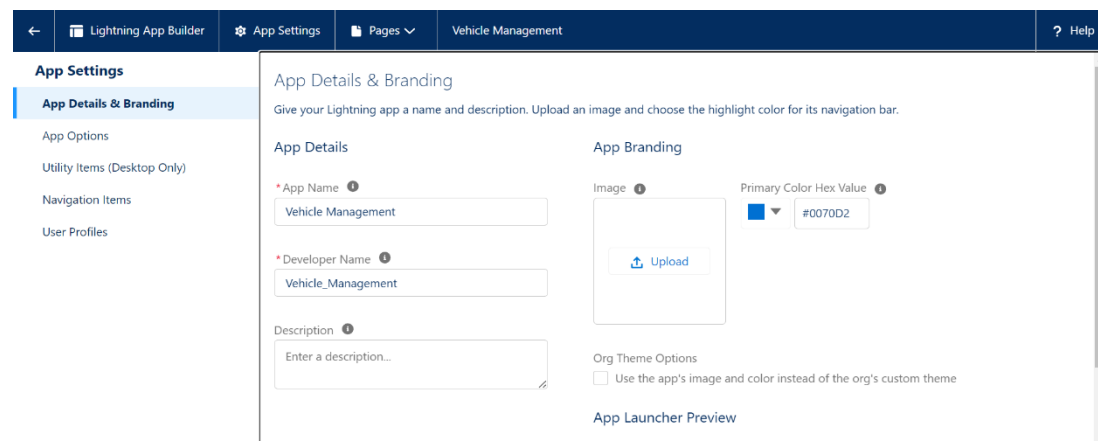


Page Layout : We Can Organize Page Layout by Adding or Removing by Dragging & Dropping.



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' and a list of items including 'Users' and 'Profiles'. The main content area is titled 'Profiles' and shows the 'Vehicle Manager' profile. It includes a list of enabled permissions (Login IP Ranges, Apex Class Access, Visualforce Page Access, External Data Source Access, Named Credential Access, External Credential Principal Access, Custom Metadata Type Access, Custom Setting Definitions Access, Flow Access, Service Presence Status Access, Custom Permissions) and 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

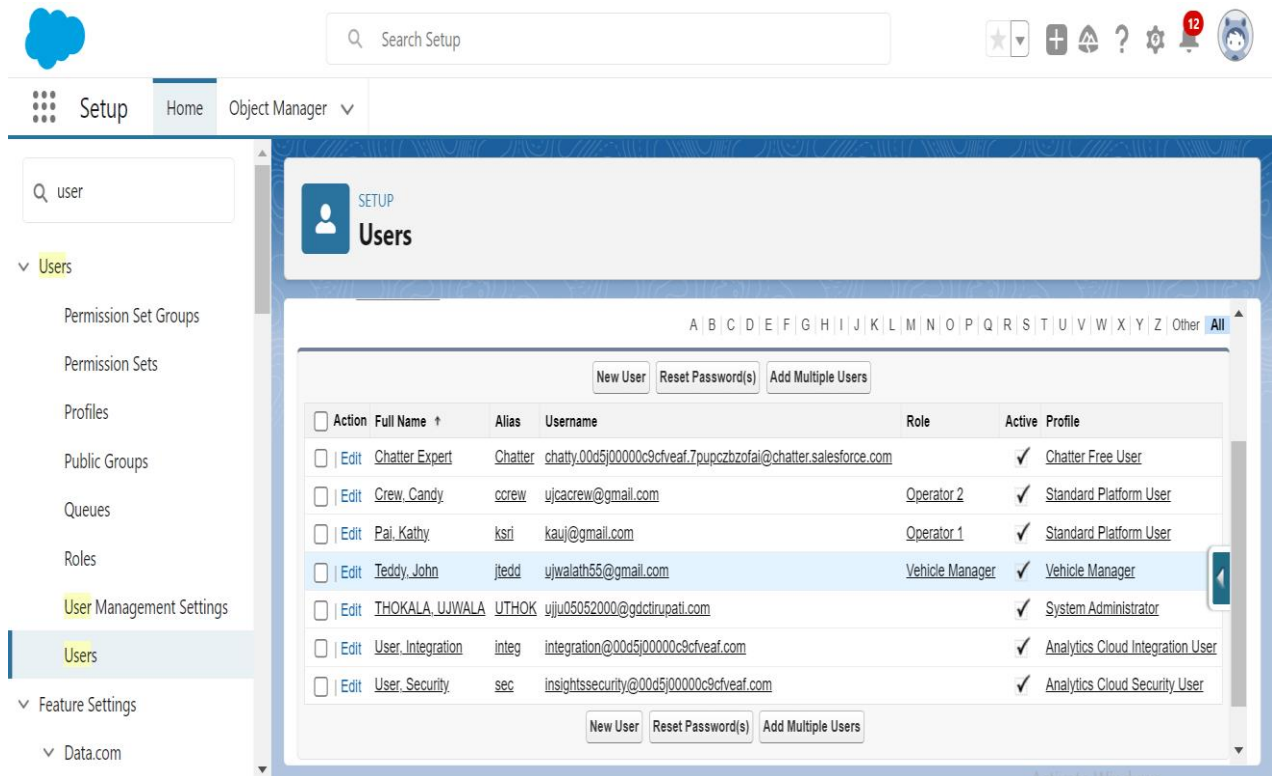
Creating Setup Roles :

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'roles' and a list of items including 'Users', 'Roles', and 'Feature Settings'. The main content area is titled 'Roles' and shows the 'Vehicle Manager' role. It includes a list of users assigned to the role, a hierarchy, and 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.

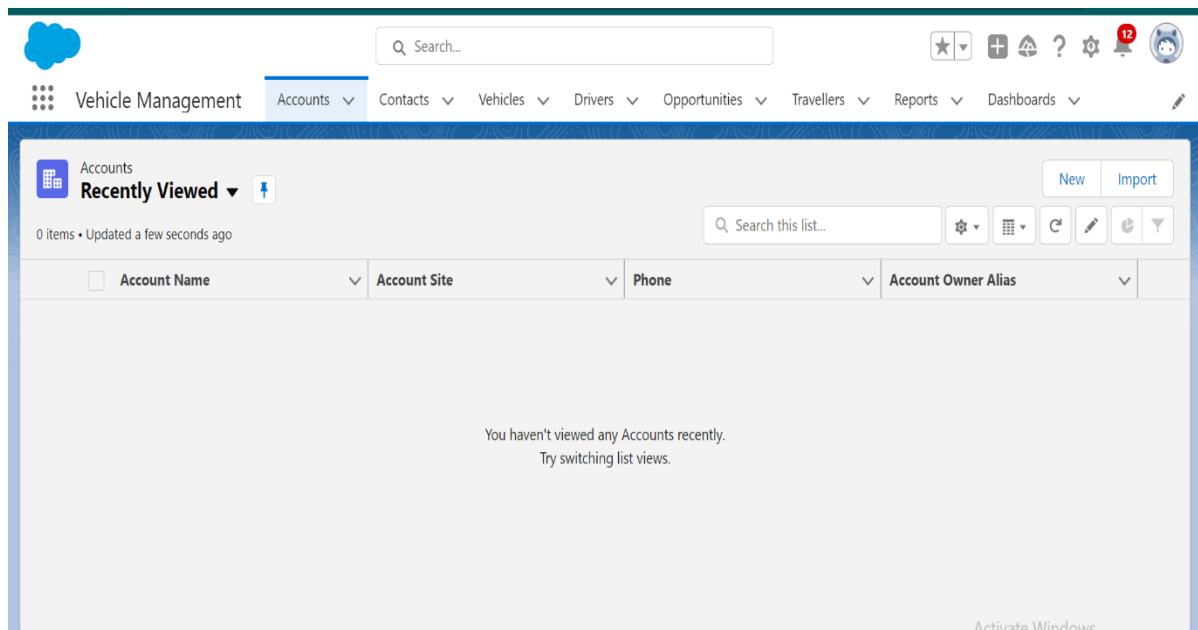


The screenshot shows the Salesforce Setup interface. The left sidebar contains a search bar with 'user' and a list of navigation items: Users, Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, Users (highlighted), Feature Settings, and Data.com. The main content area is titled 'Users' and displays a table of users. At the top of 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 users listed are Chatter Expert, Crew Candy, Pai Kathy, Teddy John, THOKALA UJJWALA, User Integration, and User Security. The 'Vehicle Manager' user is highlighted in blue.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00d5j00000c9cfveaf.7pupczbzofai@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Crew Candy	ccrew	ujcacreu@gmail.com	Operator 2	✓	Standard Platform User
<input type="checkbox"/> Edit	Pai Kathy	ksri	kauji@gmail.com	Operator 1	✓	Standard Platform User
<input type="checkbox"/> Edit	Teddy John	jtedd	ujwalath55@gmail.com	Vehicle Manager	✓	Vehicle Manager
<input type="checkbox"/> Edit	THOKALA UJJWALA	UTHOK	ujju05052000@gdctirupati.com		✓	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@00d5j00000c9cfveaf.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> 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 table of accounts. At the top of the table are buttons for 'New' and 'Import'. The table has columns for Account Name, Account Site, Phone, and Account Owner Alias. The message 'You haven't viewed any Accounts recently. Try switching list views.' is displayed in the center of the table.

Account Name	Account Site	Phone	Account Owner Alias
You haven't viewed any Accounts recently. Try switching list views.			

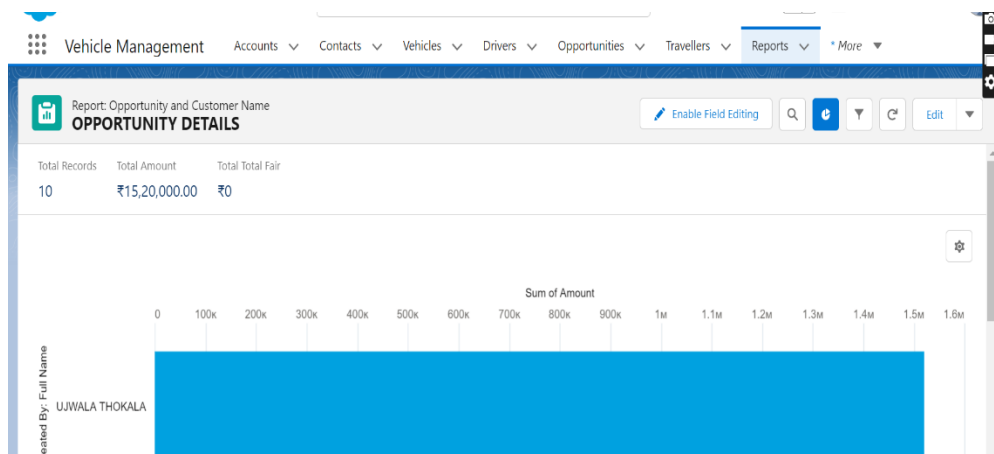
View Vehicle Record:

The screenshot shows the Salesforce 'Vehicles' page under 'Vehicle Management'. The page has a search bar at the top and a navigation menu. The 'Vehicles' tab is selected, showing a 'Recently Viewed' list of 5 items. The list includes a checkbox for each item and a dropdown arrow. The items are: Mini Van, Bike, Jeep, Car, and Scooty. The page also has buttons for 'New', 'Import', and 'Change Owner'.

	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:



Report: Opportunity and Customer Name
OPPORTUNITY DETAILS

Enable Field Editing

Created By: Full Name	Opportunity Name	Amount	Account Name: Account Name	Journey End Date	Journey Start Date	Stage
	GenePoint SLA	₹30,000.00	GenePoint	-	-	Closed Won
	Edge Emergency Generator	₹75,000.00	Edge Communications	-	-	Closed Won
	Edge Emergency Generator	₹35,000.00	Edge Communications	-	-	Id. Decision Makers
	Grand Hotels Emergency Generators	₹2,10,000.00	Grand Hotels & Resorts Ltd	-	-	Closed Won
	Grand Hotels Generator Installations	₹3,50,000.00	Grand Hotels & Resorts Ltd	-	-	Closed Won
	Grand Hotels Guest Portable Generators	₹2,50,000.00	Grand Hotels & Resorts Ltd	-	-	Value Proposition
	United Oil Refinery Generators	₹2,70,000.00	United Oil & Gas Corp.	-	-	Proposal/Price Quote
	United Oil SLA	₹1,20,000.00	United Oil & Gas Corp.	-	-	Closed Won
	United Oil Standby Generators	₹1,20,000.00	United Oil & Gas Corp.	-	-	Closed Won
Subtotal		₹15,20,000.00				
Total (10)		₹15,20,000.00				

Activate Windows

Creating of Dashboards :

