

Project Report

Vehicle Management System Using Salesforce

Description:

Vehicle Management is an application where a customer Details are stored in order to choose cars, bikes and commercial vehicles for travel within the city. The data which is stored here, further used to remind them if any offers are provided during the seasons and any updates regarding vehicles are sent to them in the form of messages and mails.

Creating Developer Account:

Creating a developer org in Salesforce.

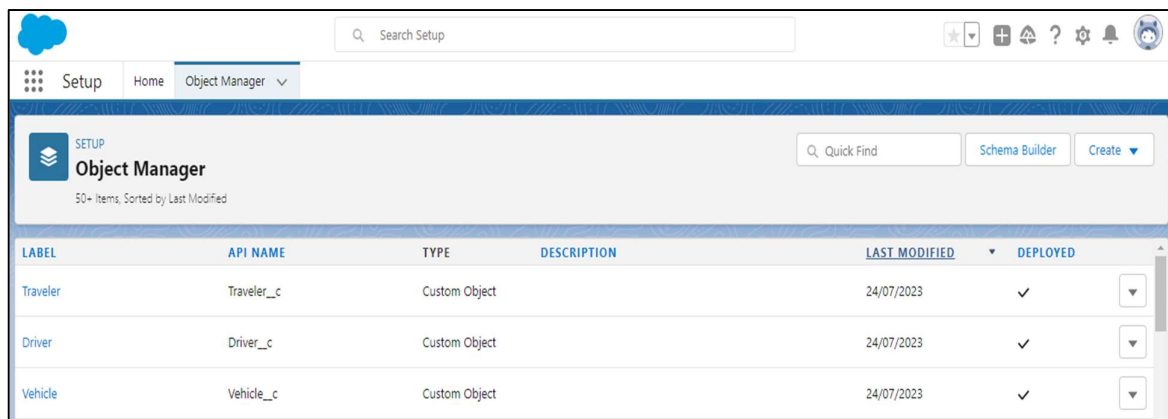
- Go to developers.salesforce.com/
- Click on sign up.
- On the sign up form, enter the following details :
- First name & Last name-Pavithra & Nallamuthu
- Email-npavithraredy2003@gmail.com
- Role : Developer
- Company : College Name-GAYATRI DEGREE COLLEGE-TIRUPATI
- County : India
- Postal Code : pin code-517501
- Username : npavithraredy2003@gdctirupati.com

Object:

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: Account, Contact, Opportunity.

Custom objects: Vehicle, Driver, Traveler.



LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Traveler	Traveler__c	Custom Object		24/07/2023	✓
Driver	Driver__c	Custom Object		24/07/2023	✓
Vehicle	Vehicle__c	Custom Object		24/07/2023	✓

After creating objects, created tabs for each object respectively as follows:

Custom Object Tabs			
		New	What Is This?
Action	Label	Tab Style	Description
Edit Del	Drivers	 Keys	
Edit Del	Travelers	 Map	
Edit Del	Vehicles	 Car	

Fields and Relationship:

The below steps will assist in creating Fields.

- ❖ Click on the gear icon and then select Setup.
- ❖ Click on the object manager tab just beside the home tab.
- ❖ Search object (Vehicle) in quick find box.
- ❖ Click fields & relationships and click new
- ❖ Select any data type click next
- ❖ Enter field label name and select next, next, and Save.

Vehicle					
15 Items, Sorted by Field Label					
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)			
Chassis No	Chassis_No__c	Text(30)			
Colour	Colour__c	Text(20)			
Condition	Condition__c	Picklist			
Created By	CreatedBy	Lookup(User)			
Last Modified By	LastModifiedBy	Lookup(User)			

Vehicle					
15 Items, Sorted by Field Label					
Created By	CreatedBy	Lookup(User)			
Last Modified By	LastModifiedBy	Lookup(User)			
Mileage	Mileage__c	Text(3)			
Owner	OwnerId	Lookup(User,Group)			
Seats	Seats__c	Number(2, 0)			
Vehicle Includes	Vehicle_Includes__c	Picklist (Multi-Select)			
Vehicle Name	Name	Text(80)			
Vehicle No	Vehicle_No__c	Text(20)			
Vehicle Type	Vehicle_Type__c	Picklist			

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)

<div> <div> <div>SETUP > OBJECT MANAGER</div> <div>Driver</div> </div> </div>				
Details	<div> <div>Fields & Relationships</div> <div>8 Items, Sorted by Field Label</div> <div> <input type="text" value="Q, Quick Find"/> <div> <div>New</div> <div>Deleted Fields</div> <div>Field Dependencies</div> <div>Set History Tracking</div> </div> </div> </div>			
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD INDEXED
Page Layouts	Created By	CreatedById	Lookup(User)	
Lightning Record Pages	Driver Name	Name	Text(80)	✓
Buttons, Links, and Actions	Fair Per Hour	Fair_Per_Hour__c	Text(10)	
Compact Layouts	Last Modified By	LastModifiedById	Lookup(User)	
Field Sets	License No	License_No__c	Text(30)	
Object Limits	Mobile No	Mobile_No__c	Phone	
Record Types	Owner	OwnerId	Lookup(User,Group)	✓
Related Lookup Filters	Vehicle	Vehicle__c	Lookup(Vehicle)	Activate Windows Go to Settings to activate Windows.
Search Layouts				
List View Button Layout				

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

<div> <div> <div>SETUP > OBJECT MANAGER</div> <div>Traveler</div> </div> </div>				
Details	<div> <div>Fields & Relationships</div> <div>6 Items, Sorted by Field Label</div> <div> <input type="text" value="Q, Quick Find"/> <div> <div>New</div> <div>Deleted Fields</div> <div>Field Dependencies</div> <div>Set History Tracking</div> </div> </div> </div>			
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD INDEXED
Page Layouts	Created By	CreatedById	Lookup(User)	
Lightning Record Pages	Last Modified By	LastModifiedById	Lookup(User)	
Buttons, Links, and Actions	Owner	OwnerId	Lookup(User,Group)	✓
Compact Layouts	Traveler Contact No	Traveler__c	Phone	
Field Sets	Traveler Email	Traveler_Email__c	Email	
Object Limits	Traveler Name	Name	Text(80)	✓
Record Types				

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)

SETUP > OBJECT MANAGER
Opportunity

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout

Fields & Relationships
31 Items, Sorted by Field Label

Quick Find

New Deleted Fields Field Dependencies Set History Tracking

Field	Field Name	Data Type
Journey End Date	Journey_End_Date__c	Date/Time
Journey Start Date	Journey_Start_Date__c	Date/Time
Route	Route__c	Long Text Area(32768)
Stage	StageName	Picklist
Total Fair	Total_Fair__c	Currency(8, 0)
Tracking Number	TrackingNumber__c	Text(12)
Type	Type	Picklist
Vehicle	Vehicle__c	Lookup(Vehicle)

Activate Windows
Go to Settings to activate Windows

Page Layout Setup:

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

SETUP > OBJECT MANAGER
Opportunity

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

Opportunity Layout

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Quick Find Field Name

Field	Field Name	Data Type
Close Date	Close Date	Date
Contract	Contract	Text
Amount	Amount	Currency
Current Generator(s)	Current Generator(s)	Text
Forecast Category	Forecast Category	Picklist
Delivery/Install...	Delivery/Install...	Text
Description	Description	Text
Expected Revenue	Expected Revenue	Currency
Last Modified By	Last Modified By	Text
Lead Source	Lead Source	Picklist
Main Competitor(s)	Main Competitor(s)	Text
Next Step	Next Step	Picklist
Opportunity Name	Opportunity Name	Text
Primary Campaign...	Primary Campaign...	Text
Opportunity Owner	Opportunity Owner	Text
Private	Private	Text
Probability (%)	Probability (%)	Text
Price Book	Price Book	Picklist
Quantity	Quantity	Text
Route	Route	Picklist
Stage	Stage	Picklist

Opportunity Sample

Highlights Panel

Customize the highlights panel for this page layout...

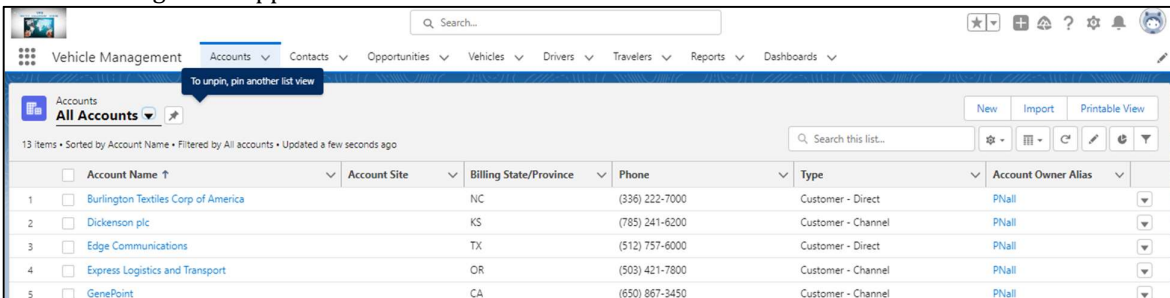
Quick Actions in the Salesforce Classic

Publisher

Lightning App:

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 'Vehicle Management' Lightning App interface. The 'Accounts' tab is selected, displaying a list of 13 accounts. The table columns are: Account Name, Account Site, Billing State/Province, Phone, Type, and Account Owner Alias. The data rows are as follows:

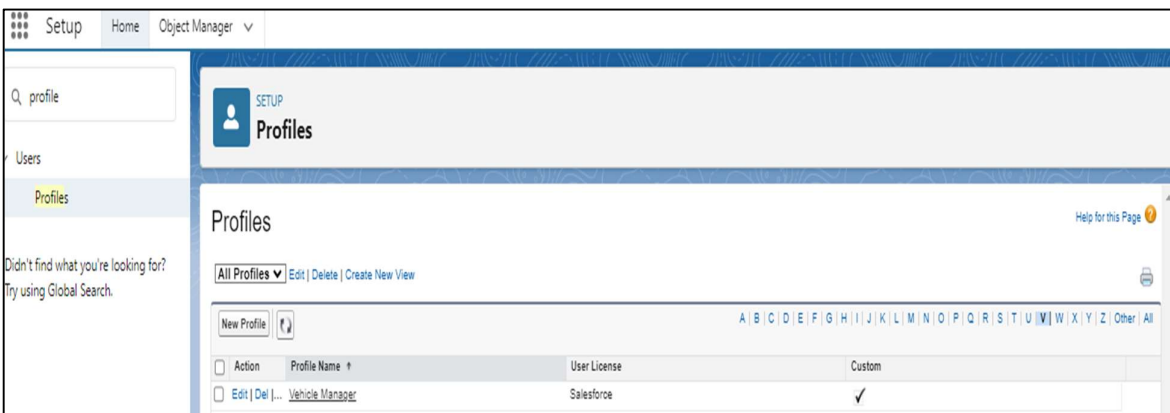
	Account Name	Account Site	Billing State/Province	Phone	Type	Account Owner Alias
1	Burlington Textiles Corp of America		NC	(336) 222-7000	Customer - Direct	PNail
2	Dickenson plc		KS	(785) 241-6200	Customer - Channel	PNail
3	Edge Communications		TX	(512) 757-6000	Customer - Direct	PNail
4	Express Logistics and Transport		OR	(503) 421-7800	Customer - Channel	PNail
5	GenePoint		CA	(650) 867-3450	Customer - Channel	PNail

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.



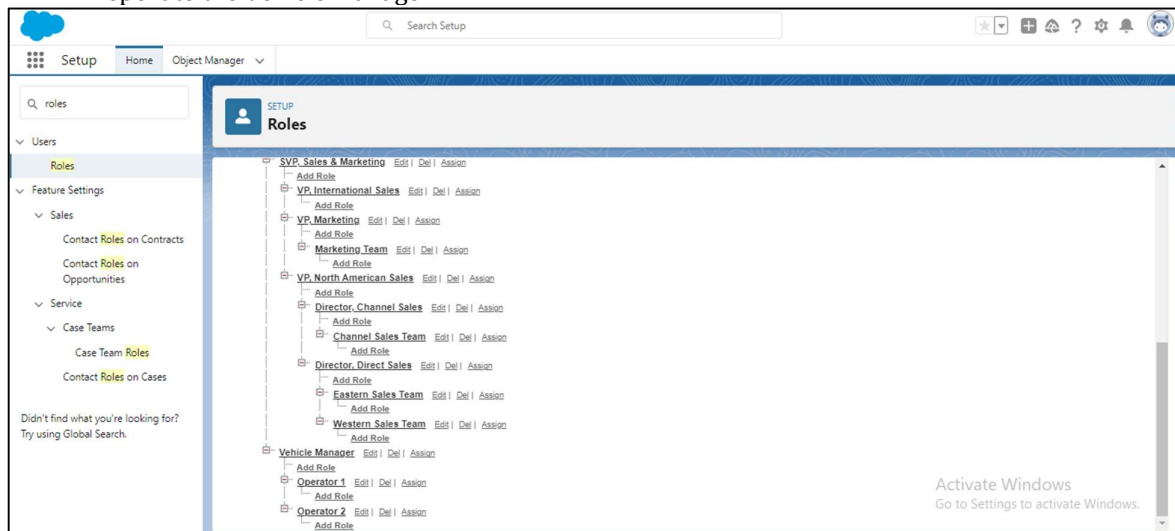
The screenshot shows the 'Setup Profiles' page in Salesforce. The 'Profiles' tab is selected, and the 'Vehicle Manager' profile is highlighted. The table below shows the profile details:

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Del ...	Vehicle Manager	Salesforce	✓

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.
- Enter a Role name that will be displayed on Reports
- Click on Save.

Similarly create Two Roles under Vehicle Manager as Operator 1 And Operator 2 Roles which will report to the Vehicle manager.



Users:

Creating 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.

SETUP
Users

User

John Teddy

[User Profile Help for this Page](#)

[Permission Set Assignments](#) |
 [Permission Set Assignments: Activation Required](#) |
 [Permission Set Group Assignments](#) |
 [Permission Set License Assignments](#) |
 [Personal Groups](#) |
 [Public Group Membership](#) |
 [Queue Membership](#) |
 [Team](#) |
 [Managers in the Role Hierarchy](#) |
 [OAuth Apps](#) |
 [Third-Party Account Links](#) |
 [Installed Mobile Apps](#) |
 [Authentication Settings for External Systems](#) |
 [Login History](#) |
 [User Provisioning Accounts](#)

User Detail

[Edit](#)
[Sharing](#)
[Reset Password](#)
[Freeze](#)

Name	John Teddy	Role	Vehicle Manager
Alias	jtedd	User License	Salesforce
Email	npavithraredy2003@gmail.com [Verified]	Profile	Vehicle Manager
Username	johnreddy@19white.com	Active	<input checked="" type="checkbox"/>
Nickname	john	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View
Delegated Approver		Data.com User Type	i
Manager		Accessibility Mode (Classic Only)	<input type="checkbox"/>

Activate Windows
 Go to Settings to activate Windows.

Similarly create other 2 users and assign operator 1 and operator 2 roles along with operator profile.

SETUP
Users

All Users

[Help for this Page](#)

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

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

View: [All Users](#) | [Edit](#) | [Create New User](#)

[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](#) | [All](#)

[New User](#)
[Reset Password\(s\)](#)
[Add Multiple Users](#)

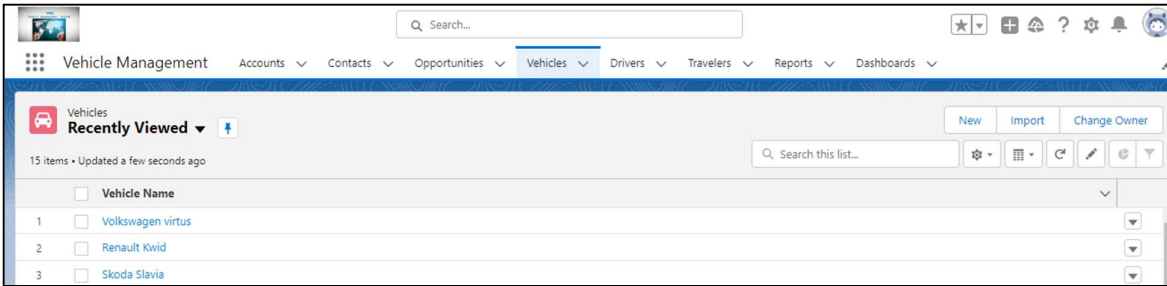
<input type="checkbox"/>	Action	Full Name ↑	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Edit	Chatter Expert	Chatter	chatty.00d5j00000c9hc3eaf.1hspwrgw@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Edit	Nallamuthu Pavithra	PNall	npavithraredy2003@odctiruqati.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Edit	operator 1	oper	operator1@19red.com	Operator 1	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Edit	operator 2	oper	operator2@19yellow.com	Operator 2	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Edit	Teddy John	jtedd	johnreddy@19white.com	Vehicle Manager	<input checked="" type="checkbox"/>	Vehicle Manager
<input type="checkbox"/>	Edit	User Integration	integ	integration@00d5j00000c9hc3eaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	Edit	User Security	sec	insightsecurity@00d5j00000c9hc3eaf.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Activate Windows
 Go to Settings to activate Windows.

User Adoption:

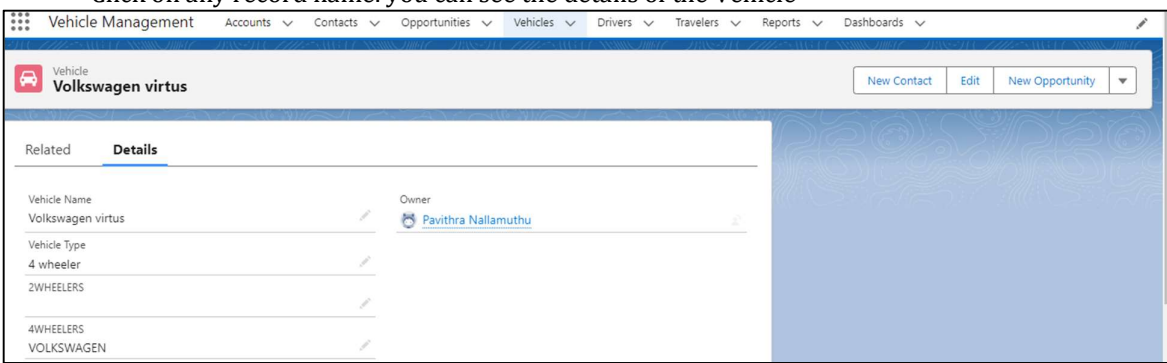
Create Vehicle Record:

- Click on App 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



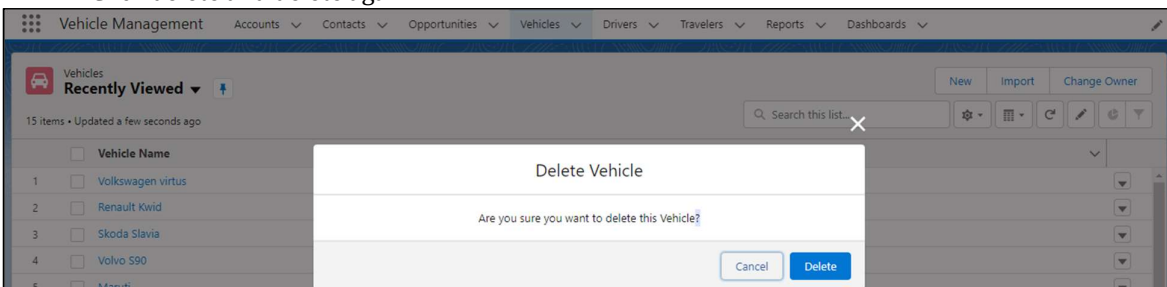
View Record (Vehicle):

- Click on App 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.



Report & 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 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.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Opportunity Details		Private Reports	Pavithra Nallamuthu	31/7/2023, 11:56 am	

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.

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Opportunity Details		Private Dashboards	Pavithra Nallamuthu	31/7/2023, 11:57 am	

Reporting:

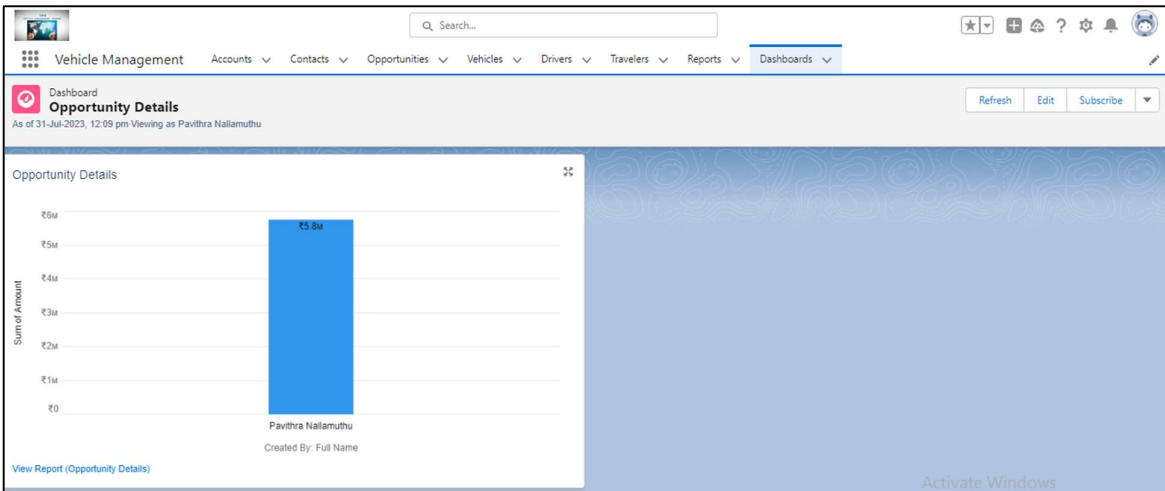
Report:

- ✓ 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

Created By: Full Name	Opportunity Name	Type	Close Date	Account Name: Account Name	Created Date	Opportunity Owner: Full Name	Amount
Pavithra Nallamuthu (31)	Dickenson Mobile Generators	New Customer	02/06/2023	Dickenson plc	24/07/2023	Pavithra Nallamuthu	₹
	United Oil Office Portable Generators	Existing Customer - Upgrade	21/05/2023	United Oil & Gas Corp.	24/07/2023	Pavithra Nallamuthu	₹1
	Express Logistics Standby Generator	New Customer	16/04/2023	Express Logistics and Transport	24/07/2023	Pavithra Nallamuthu	₹2
	GenePoint Standby Generator	New Customer	24/05/2023	GenePoint	24/07/2023	Pavithra Nallamuthu	₹
	Grand Hotels Kitchen Generator	Existing Customer - Upgrade	11/04/2023	Grand Hotels & Resorts Ltd	24/07/2023	Pavithra Nallamuthu	₹
	United Oil Refinery Generators	Existing Customer - Upgrade	05/07/2023	United Oil & Gas Corp.	24/07/2023	Pavithra Nallamuthu	₹2
	United Oil SLA	Existing Customer - Upgrade	12/07/2023	United Oil & Gas Corp.	24/07/2023	Pavithra Nallamuthu	₹1
	Grand Hotels Guest Portable Generators	Existing Customer - Upgrade	20/07/2023	Grand Hotels & Resorts Ltd	24/07/2023	Pavithra Nallamuthu	₹2
	Edge Emergency Generator	New Customer	20/07/2023	Edge Communications	24/07/2023	Pavithra Nallamuthu	₹
	University of AZ Portable Generators	New Customer	20/04/2023	University of Arizona	24/07/2023	Pavithra Nallamuthu	₹

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



<-----THE END----->