

Project Report on

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.

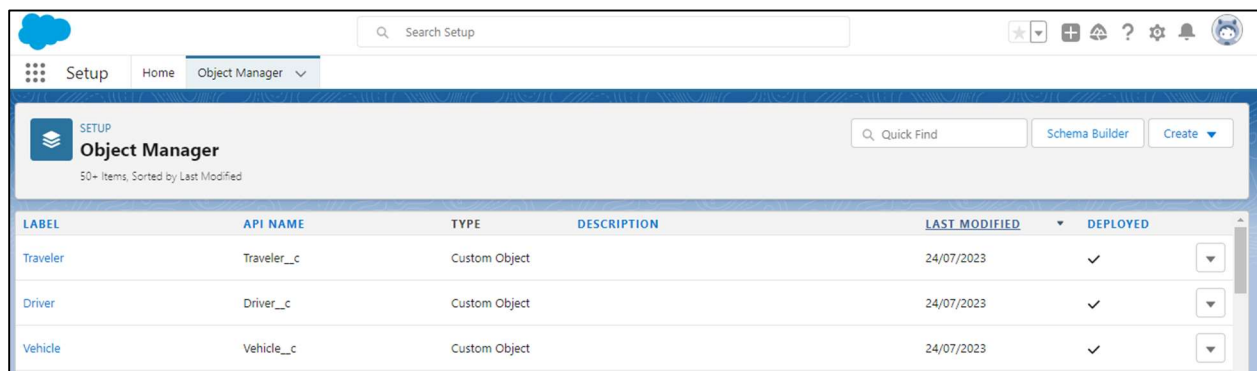
- Go to developers.salesforce.com/
- Click on sign up.
- On the sign up form, enter the following details :
- First name & Last name-Bhavyasree & Udayagiri
- Email-bhavyasreeudayagiri@gmail.com
- Role : Developer
- Company : College Name-GAYATRI DEGREE COLLEGE-TIRUPATI
- County : India
- Postal Code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



The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below this, the 'Object Manager' section is active, displaying a list of objects. The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. Three custom objects are listed: Traveler, Driver, and Vehicle, all created on 24/07/2023 and marked as deployed.

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.

SETUP > OBJECT MANAGER

Vehicle

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

15 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

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	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		

Activate Windows
Go to Settings to activate Windows.

SETUP > OBJECT MANAGER

Vehicle

Details

Fields & Relationships

15 Items, Sorted by Field Label

Q, Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

Created By	CreatedById	Lookup(User)	
Last Modified By	LastModifiedById	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	

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Details

Fields & Relationships

15 Items, Sorted by Field Label

Q, Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

Created By	CreatedById	Lookup(User)	
Last Modified By	LastModifiedById	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	

Activate Windows

Go to Settings to activate Windows.

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

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

Lightning 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.

	Account Name ↑	Account Site	Billing State/Pro...	Phone	Type	Account Owner...
1	Burlington Textiles Corp of America		NC	(336) 222-7000	Customer - Direct	BUDAY
2	Dickenson plc		KS	(785) 241-6200	Customer - Channel	BUDAY
3	Edge Communications		TX	(512) 757-6000	Customer - Direct	BUDAY
4	Express Logistics and Transport		OR	(503) 421-7800	Customer - Channel	BUDAY
5	GenePoint		CA	(650) 867-3450	Customer - Channel	BUDAY
6	Grand Hotels & Resorts Ltd		IL	(312) 596-1000	Customer - Direct	BUDAY
7	Pyramid Construction Inc			(914) 427-4477	Customer - Channel	BUDAY

Profile:

Creating a Profile:

Now create a Vehicle Manager profile and set its object permissions.

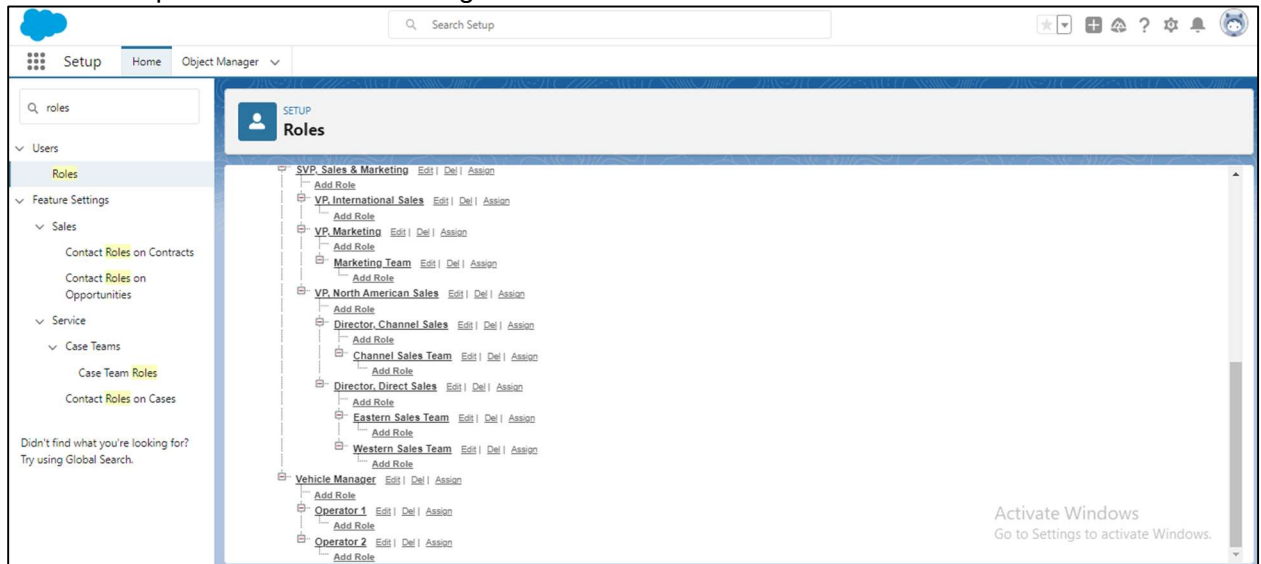
- ❖ From Setup enter Profiles in the Quick Find box, and select Profiles.
- ❖ From the list of profiles, find Standard User.
- ❖ Click Clone.
- ❖ For Profile Name, enter Vehicle Manager.
- ❖ Click Save.
- ❖ While still on the Vehicle Manager Profile page, then click Edit.
- ❖ Scroll down to Custom Object Permissions and give access for Create, Read, Edit, and Delete, View all and modify all for Vehicle object Driver object and Traveler object.

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Vehicle Manager	Salesforce	<input checked="" type="checkbox"/>

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 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.

SETUP

Users

User

John Teddy

[User Profile Help for this Page](#)

[Permission Set Assignments \[0\]](#) |
 [Permission Set Assignments: Activation Required \[0\]](#) |
 [Permission Set Group Assignments \[0\]](#) |
 [Permission Set License Assignments \[0\]](#) |
 [Personal Group \[0\]](#) |
 [Public Group Membership \[0\]](#) |
 [Queue Membership \[0\]](#) |
 [Team \[0\]](#) |
 [Managers in the Role Hierarchy \[0\]](#) |
 [OAuth Apps \[0\]](#) |
 [Third-Party Account Links \[0\]](#) |
 [Installed Mobile Apps \[0\]](#) |
 [Authentication Settings for External Systems \[0\]](#) |
 [Login History \[0+\]](#) |
 [User Provisioning Accounts \[0\]](#)

User Detail

Edit

Sharing

Reset Password

Freeze

Name	John Teddy	Role	Vehicle Manager
Alias	teddy	User License	Salesforce
Email	johnreddy2406@gmail.com [Verify]	Profile	Standard User
Username	johnreddy2406@gmail.com	Active	<input checked="" type="checkbox"/>
Nickname	User16904401403104709658 [i]	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"/>

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

SETUP

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 View

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

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.00d5j00000c9gtbeaz.5mxijs1iv3f4@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Teddy John	teddy	johnreddy2406@gmail.com	Vehicle Manager	<input checked="" type="checkbox"/>	Standard User
<input type="checkbox"/> Edit	Teddy Operator 1	otedd	baviadmin2406@gmail.com	Vehicle Managers	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	Teddy Operator 2	otedd	paviadmin2419@gmail.com	Vehicle Manager	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	UDAYAGIRI BHAVYASREE	BUDAY	bhavyasreeudayagin@gdcptl.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@00d5j00000c9gtbeaz.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightssecurity@00d5j00000c9gtbeaz.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User

Reset Password(s)

Add Multiple Users

User Adoption:

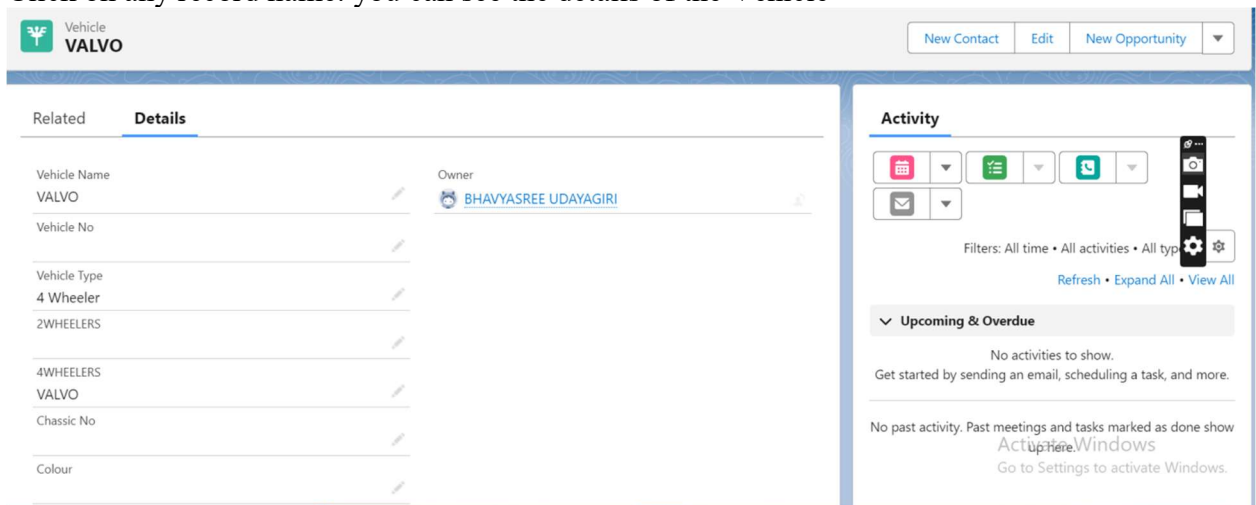
Create Vehicle Record:

- 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



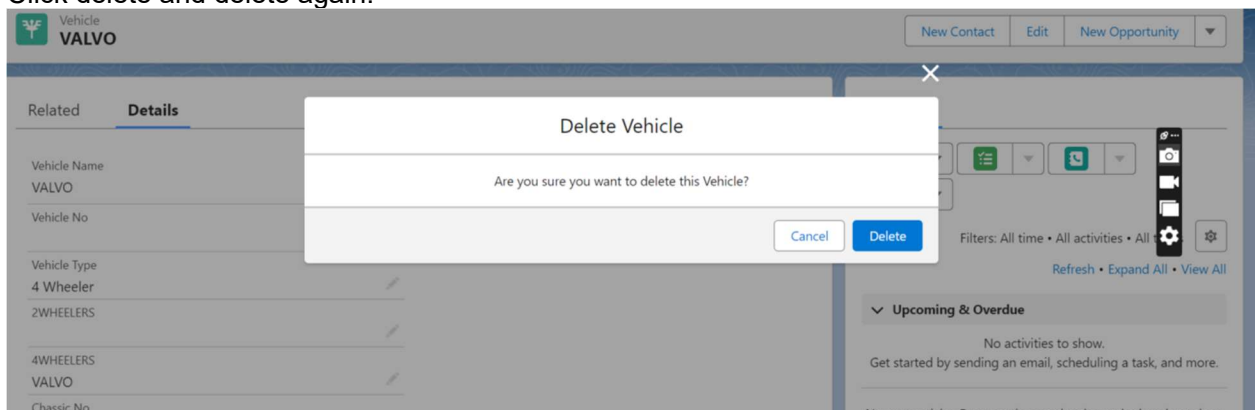
View Record (Vehicle):

- 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):

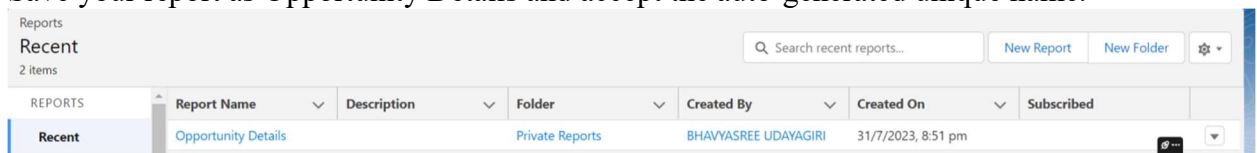
- Click on App Launcher on left side of screen.
- Search Vehicle Management System & click on it.
- Click on Vehicle Tab.
- Click on Arrow at right hand side on that Particular record.
- Click delete and delete again.



Report & Dashboards:

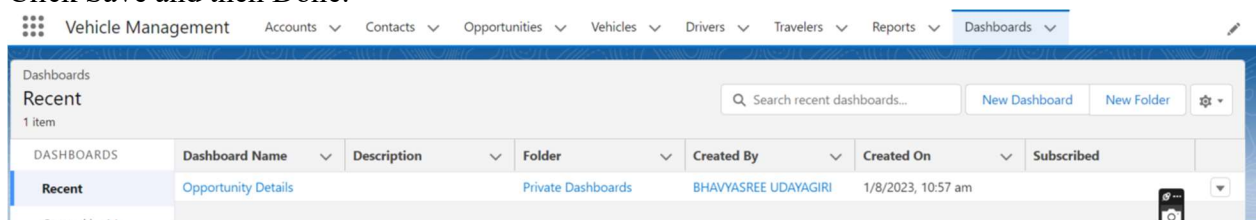
Create Report:

- ✓ 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.



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.



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

Enable Field Editing 🔍 📄 ⌵ ↺ Edit ⌵

Opportunity Owner: Full Name ↑	Opportunity Name	Account Name: Account Name	Amount
BHAVYASREE UDAYAGIRI (10)	GenePoint Lab Generators	GenePoint	₹60,000.00
	GenePoint SLA	GenePoint	₹30,000.00
	Edge Emergency Generator	Edge Communications	₹75,000.00
	Edge Emergency Generator	Edge Communications	₹35,000.00
	United Oil Refinery Generators	United Oil & Gas Corp.	₹2,70,000.00
	United Oil SLA	United Oil & Gas Corp.	₹1,20,000.00
	United Oil Standby Generators	United Oil & Gas Corp.	₹1,20,000.00
	Grand Hotels Emergency Generators	Grand Hotels & Resorts Ltd	₹2,10,000.00
	Grand Hotels Generator Installations	Grand Hotels & Resorts Ltd	₹3,50,000.00
	Grand Hotels Guest Portable Generators	Grand Hotels & Resorts Ltd	₹2,50,000.00
Subtotal			₹15,20,000.00
Total (10)			₹15,20,000.00

Activate Windows
Go to Settings to activate Windows.

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 ----->

