

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: NEEERAJA & KONISETTY
- ❖ Email – konisettyneeraja@gmail.com
- ❖ Role : Developer
- ❖ Company : College Name – GAYATRI DEGREE COLLEGE TIRUPATI
- ❖ Country : India
- ❖ Postal Code : Pin code – 517501
- ❖ Username : should be a combination of your name and company – konisettyneeraja@gdctirupati.com

Create an Object:-

I am creating 3 objects – vehicle, driver, traveller .



The screenshot shows the Salesforce Object Manager interface. At the top, there's a header with the 'Object Manager' title and a search bar. Below the header, a table lists the objects. The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. Three objects are listed: Vehicle, Traveler, and Driver, all of type 'Custom Object' and created on 01/08/2023.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Vehicle	Vehicle__c	Custom Object		02/08/2023	✓
Traveler	Traveler__c	Custom Object		01/08/2023	✓
Driver	Driver__c	Custom Object		01/08/2023	✓

Creating the following fields & Relationship: An object Relationship in salesforce is a two way.

Association between two objects.

Fields in vehicle object : Creating 12 fields in Vehicle object

Creation Of Fields

Fields in Vehicles objects follow below data types:

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.	Chassic No	Custom	Text (30)
7.	Colour	Custom	Text (20)
8.	Body Type	Custom	Text (20)

9.	Vehicle Includes <ul style="list-style-type: none"> • Fire Extinguisher • FirstAid 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

Vehicle					
Details	Fields & Relationships				
Fields & Relationships	15 Items, Sorted by Field Label				
Page Layouts	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Lightning Record Pages	2 wheelers	X2_wheelers__c	Picklist	vehicle type	
Buttons, Links, and Actions	4 wheelers	X4_wheelers__c	Picklist	vehicle type	
Compact Layouts	Body Type	Body_Type__c	Text(20)		
Field Sets	Classic No	Classic_No__c	Text(30)		
Object Limits	Colour	Colour__c	Text(20)		
Record Types	Condition	Condition__c	Picklist		
Related Lookup Filters	Created By	CreatedById	Lookup(User)		
Search Layouts					

Vehicle					
Details	Fields & Relationships				
Fields & Relationships	15 Items, Sorted by Field Label				
Page Layouts	Last Modified By	LastModifiedById	Lookup(User)		
Lightning Record Pages	Mileage	Mileage__c	Text(3)		
Buttons, Links, and Actions	Owner	OwnerId	Lookup(User,Group)		✓
Compact Layouts	Seats	Seats__c	Number(2, 2)		
Field Sets	Vehicle Includes	Vehicle_Includes__c	Picklist (Multi-Select)		
Object Limits	Vehicle Name	Name	Text(80)		✓
Record Types	Vehicle No	Vehicle_No__c	Text(20)		
Related Lookup Filters	vehicle type	vehicle_type__c	Picklist		
Search Layouts					

Fields in Object : Creating 5 fields in Driver Object.

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)


Fields in Traveller Object : Creating 3 fields in Traveller

Object.

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

SETUP > OBJECT MANAGER

Traveler

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

Fields & Relationships

7 Items, Sorted by Field Label

Quick Find

NewDeleted FieldsField DependenciesSet History Tracking

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	Traveler_Name__c	Text(1)		
Traveler Name	Name	Text(80)		✓

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

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

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

Fields & Relationships

26+ Items, Sorted by Controlling Field

Quick Find

New

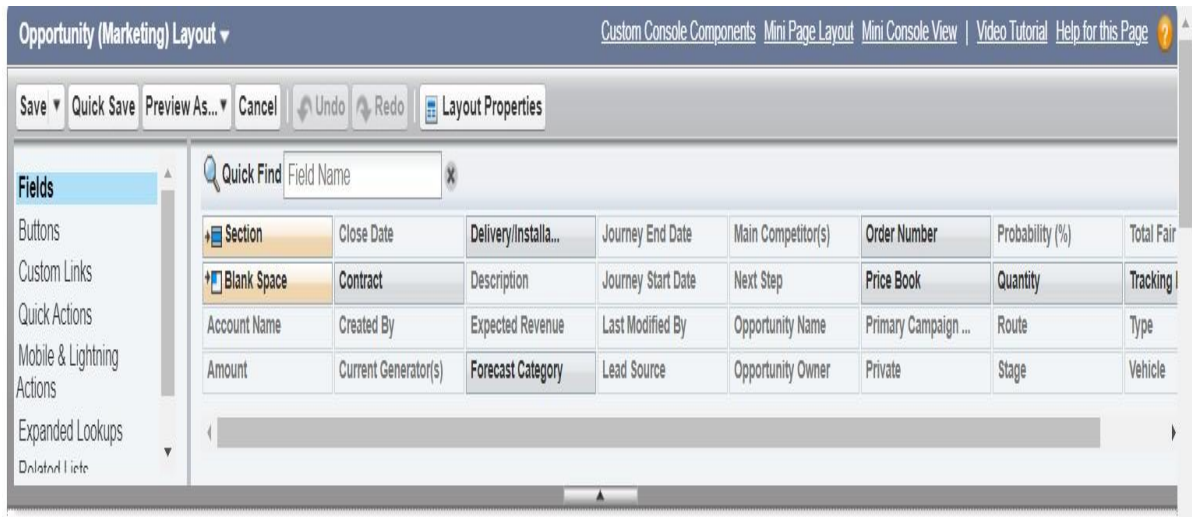
Deleted Fields

Field Dependencies

Set History Tracking

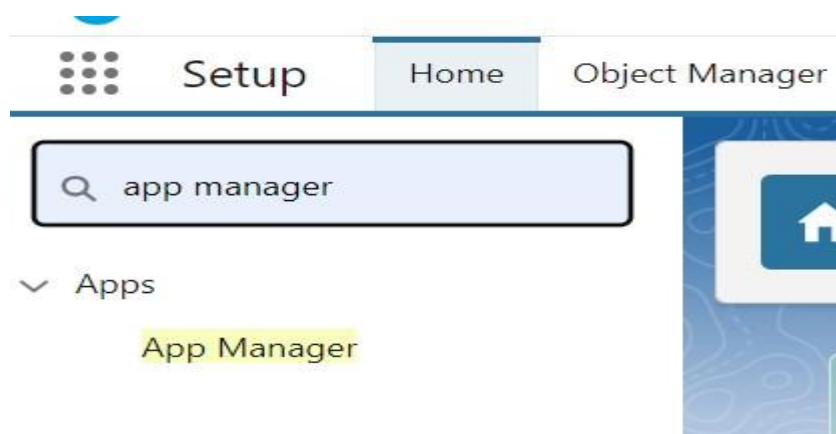
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Vehicle	Vehicle_c	Lookup(Vehicle)		✓
Type	Type	Picklist		
Tracking Number	TrackingNumber_c	Text(12)		
Total Fair	Total_Fair_c	Currency(8, 8)		
Stage	StageName	Picklist		
Route	Route_c	Text(10)		
Quantity	TotalOpportunityQuantity	Number(16, 2)		

Page Layout : We Can Organize Page Layout by adding or Removing by Dragging or 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.



The screenshot shows the 'App Settings' page in the Lightning App Builder. The left sidebar lists 'App Settings' with sub-items: 'App Details & Branding' (selected), 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main content area is titled 'App Details & Branding' and includes instructions: 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.' It is divided into two sections: 'App Details' and 'App Branding'.

App Details:

- *App Name: Vehicle Management
- *Developer Name: New_Vehicle
- Description: Enter a description...

App Branding:

- Image: Upload button
- Primary Color Hex Value: #0070D2
- Org Theme Options: ☐ Use the app's image and color instead of the org's custom theme
- App Launcher Preview: A preview showing a blue square with 'VM' and a grey rectangle with 'Vehicle Management'.

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 'Profiles' page in the Salesforce Setup menu. The left sidebar has a search bar with 'profiles' and a list with 'Users' and 'Profiles' (selected). The main content area is titled 'Profiles' and includes a 'New Profile' button and a table of existing profiles.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Edit Clone	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom: Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Edit Del ...	Custom: Sales Profile	Salesforce	<input checked="" type="checkbox"/>

1-25 of 41 0 Selected

Creating Setup Roles :

The screenshot shows the Salesforce Setup Roles page. The left sidebar contains a search bar with 'roles' and a list of navigation items: Users, Roles (highlighted), Feature Settings, Sales (with sub-items: Contact Roles on Contracts, Contact Roles on Opportunities), Service (with sub-items: Case Teams, Case Team Roles, Contact Roles on Cases), and a link to find what you're looking for using Global Search. The main content area is titled 'Understanding Roles' and includes a 'Sample Role Hierarchy' diagram. The diagram shows a hierarchy starting with 'Executive Staff' (CEO, President, CFO, VP, Sales) at the top. Below this are three regional directors: 'Western Sales Director', 'Eastern Sales Director', and 'International Sales Director'. Each director has associated sales representatives: 'Western Sales Rep' (CA, OR), 'Eastern Sales Rep' (NY, MA), and 'International Sales Rep' (Asian, European). The diagram also includes notes about data access permissions for each level.

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

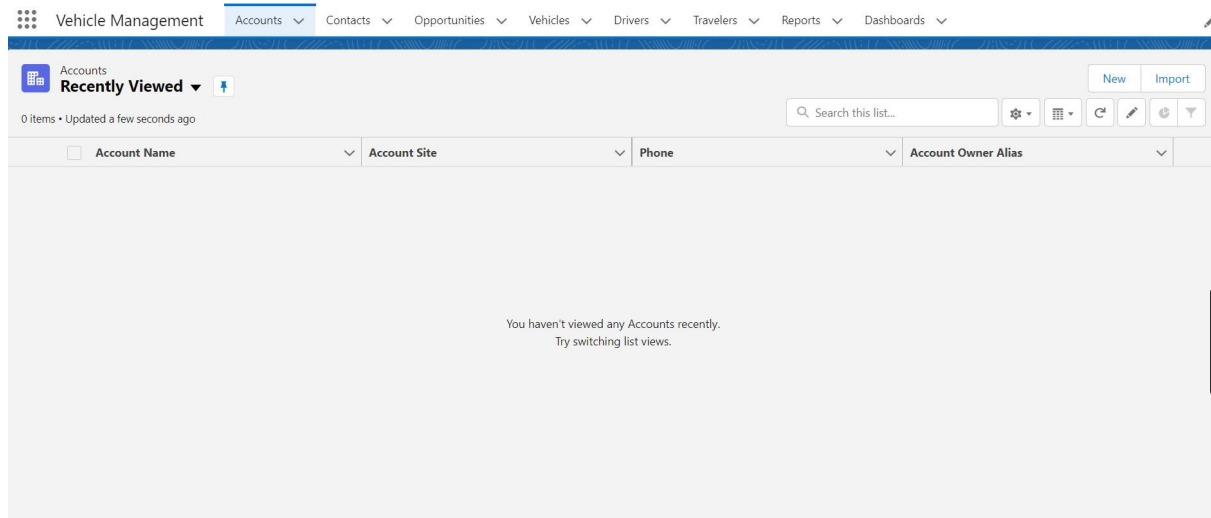
Creating a users name john teddy and e-mail and unique user name in form of e-mail address and click save

The screenshot shows the Salesforce Setup Users page. The left sidebar contains a search bar with 'users' and a list of navigation items: Users (highlighted), Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and a link to find what you're looking for using Global Search. The main content area is titled 'All Users' and includes a table of users. The table has columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The users listed are: Chatter Expert, Dharmaraja, John Teddy, Konisetty Ganesh, KONISETTY NEERAJA, User Integration, and User Security. The 'John Teddy' user is highlighted in the table.

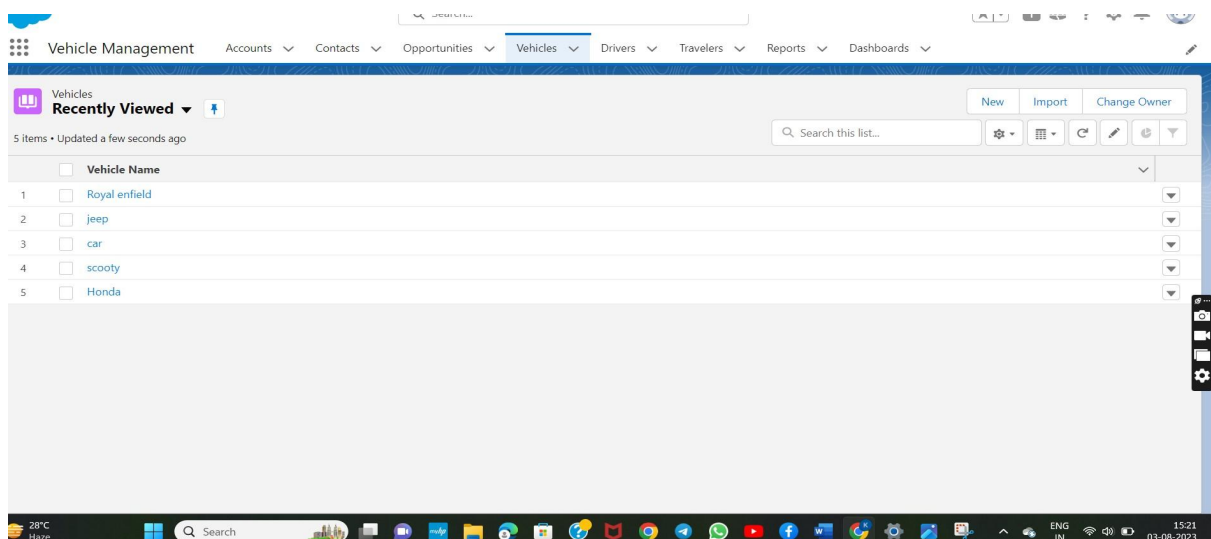
Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.0005j00000c0f1yea@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/> Edit	Dharma Raja	tdhar	dharmarajaneeru23@gmail.com	Vehicle Manager	✓	Identity User
<input type="checkbox"/> Edit	John Teddy	tjoh	johnteddyho@upgmail.com	Vehicle Manager	✓	Vehicle Manager
<input type="checkbox"/> Edit	Konisetty Ganesh	gkon	ganeshkonisetty123@gmail.com	Vehicle Manager	✓	Identity User
<input type="checkbox"/> Edit	KONISETTY NEERAJA	NKONI	konisetyneeraja@sandbox.com		✓	System Administrator
<input type="checkbox"/> Edit	User Integration	integ	integration@000d5j00000c0f1yea.com		✓	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User Security	sec	insightsssecurity@000d5j00000c0f1yea.com		✓	Analytics Cloud Security User

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

Create Vehicle Record

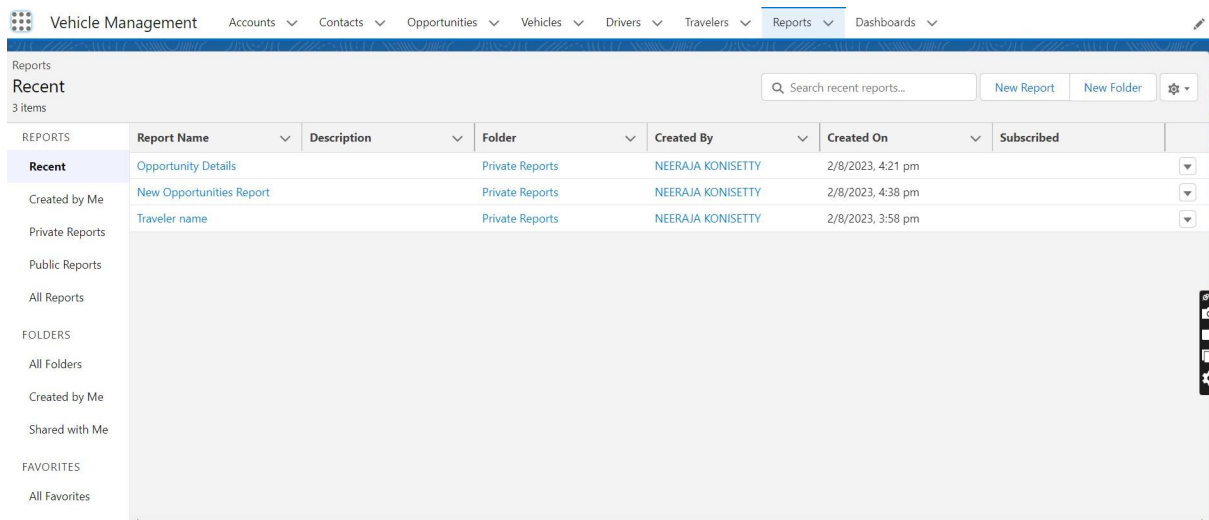


View Vehicle Record:



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.

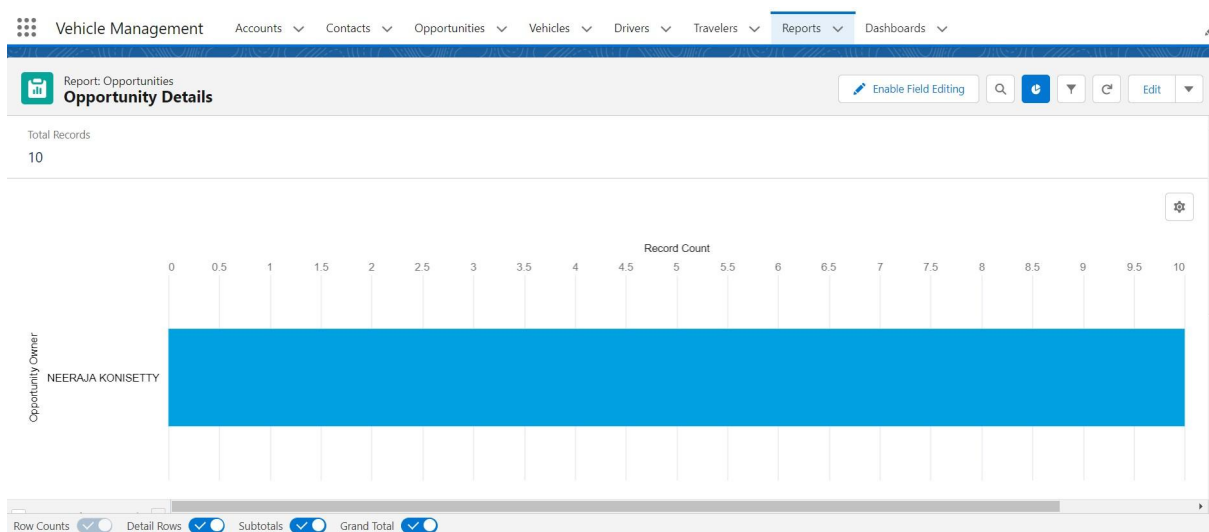
Creating of Reports:



The screenshot shows the Salesforce Reports interface. The top navigation bar includes 'Vehicle Management', 'Accounts', 'Contacts', 'Opportunities', 'Vehicles', 'Drivers', 'Travelers', 'Reports', and 'Dashboards'. The 'Reports' section is active, showing a list of recent reports. The table has columns for 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. Three reports are listed: 'Opportunity Details', 'New Opportunities Report', and 'Traveler name', all created by 'NEERAJA KONISETTY' on 2/8/2023.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Opportunity Details		Private Reports	NEERAJA KONISETTY	2/8/2023, 4:21 pm	
Created by Me	New Opportunities Report		Private Reports	NEERAJA KONISETTY	2/8/2023, 4:38 pm	
Private Reports	Traveler name		Private Reports	NEERAJA KONISETTY	2/8/2023, 3:58 pm	

Created report Chart:



Report: Opportunities
Opportunity Details

Enable Field Editing 🔍 🏠 ⚙️ Edit ▼

Opportunity Owner	Owner Role	Account Name	Opportunity Name	Stage	Fiscal Period	Amount	Probability (%)	Age	Created Date	
NEERAJA KONISETTY (10)		GenePoint	GenePoint Lab Generators	Id. Decision Makers	Q2-2015	₹60,000.00	60%	10	24/07/2023	Op
		GenePoint	GenePoint SLA	Closed Won	Q2-2015	₹30,000.00	100%	0	24/07/2023	Op
		Edge Communications	Edge Emergency Generator	Closed Won	Q2-2015	₹75,000.00	100%	0	24/07/2023	Op
		Edge Communications	Edge Emergency Generator	Id. Decision Makers	Q2-2015	₹35,000.00	60%	10	24/07/2023	Op
		Grand Hotels & Resorts Ltd	Grand Hotels Emergency Generators	Closed Won	Q2-2015	₹2,10,000.00	100%	0	24/07/2023	Op
		Grand Hotels & Resorts Ltd	Grand Hotels Generator Installations	Closed Won	Q2-2015	₹3,50,000.00	100%	0	24/07/2023	Op
		Grand Hotels & Resorts Ltd	Grand Hotels Guest Portable Generators	Value Proposition	Q2-2015	₹2,50,000.00	50%	10	24/07/2023	Op
		United Oil & Gas Corp.	United Oil Refinery Generators	Proposal/Price Quote	Q2-2015	₹2,70,000.00	75%	10	24/07/2023	Op
		United Oil & Gas Corp.	United Oil SLA	Closed Won	Q2-2015	₹1,20,000.00	100%	0	24/07/2023	Op
		United Oil & Gas Corp.	United Oil Standby Generators	Closed Won	Q2-2015	₹1,20,000.00	100%	0	24/07/2023	Op
Subtotal										
Total (10)										

Low Counts ☒ Detail Rows ☒ Subtotals ☒ Grand Total ☒

Creating of Dashboards :

Dashboards

Recent

1 item

Search recent dashboards... New Dashboard New Folder ⚙️

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Opportunity and Dashboard		Private Dashboards	NEERAJA KONISETTY	2/8/2023, 6:25 pm	
Created by Me						
Private Dashboards						
All Dashboards						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

Created Dashboard Chart:

