

VEHICLE MANAGEMENT SYSTEM USING SALESFORCE

Team Members

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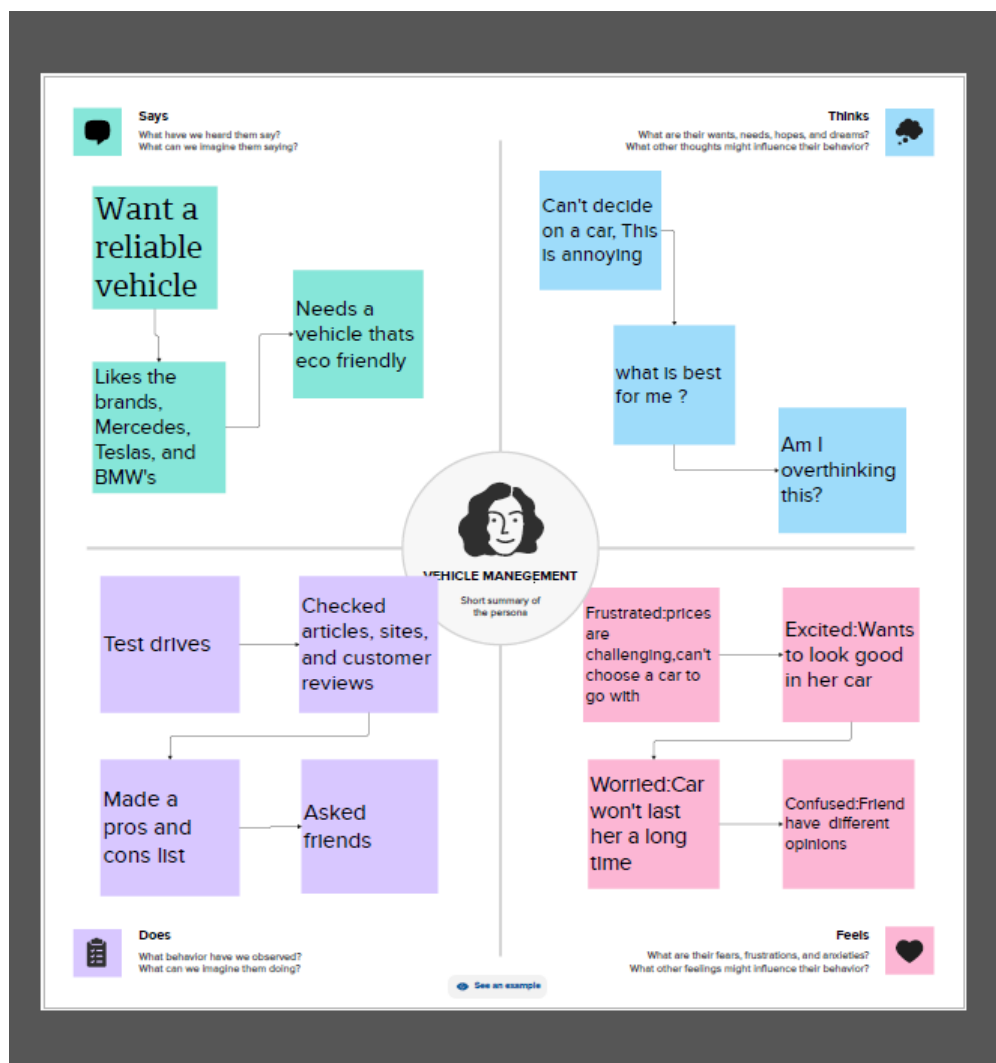
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Vehicle Management System using Salesforce

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

Empathy map:



Milestone 1: Creation Salesforce Org:

Introduction

Are you new to salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of this question, then you're in the right place. This module is for you.

Welcome to salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

What is Salesforce?

Salesforce is the customer company. We make cloud-based software designed to help businesses connect to their customers in a whole new way, so they can find more prospects, close more deals, and wow customers with amazing service.

Customer 360, our complete suite of products, unites your sales, service, marketing, commerce, and IT teams with a single, shared view of customer information, so that your company can become a customer company, too.

Activity 1:

Creating Developer Account

Creating a developer org in salesforce.

1. Go to developer.salesforce.com
2. Click on sign up.
3. On the sign-up form, enter the following details:
 - a. First name & Last name
 - b. Email
 - c. Role Developer

Milestone 2: Object

Salesforce objects are database tables that permit you to store data that is specific to an organisation. Salesforce objects are of two types, Standard Objects. Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

Standard Objects: Account, Contact, Opportunity.

Custom objects: Vehicles, Drivers.

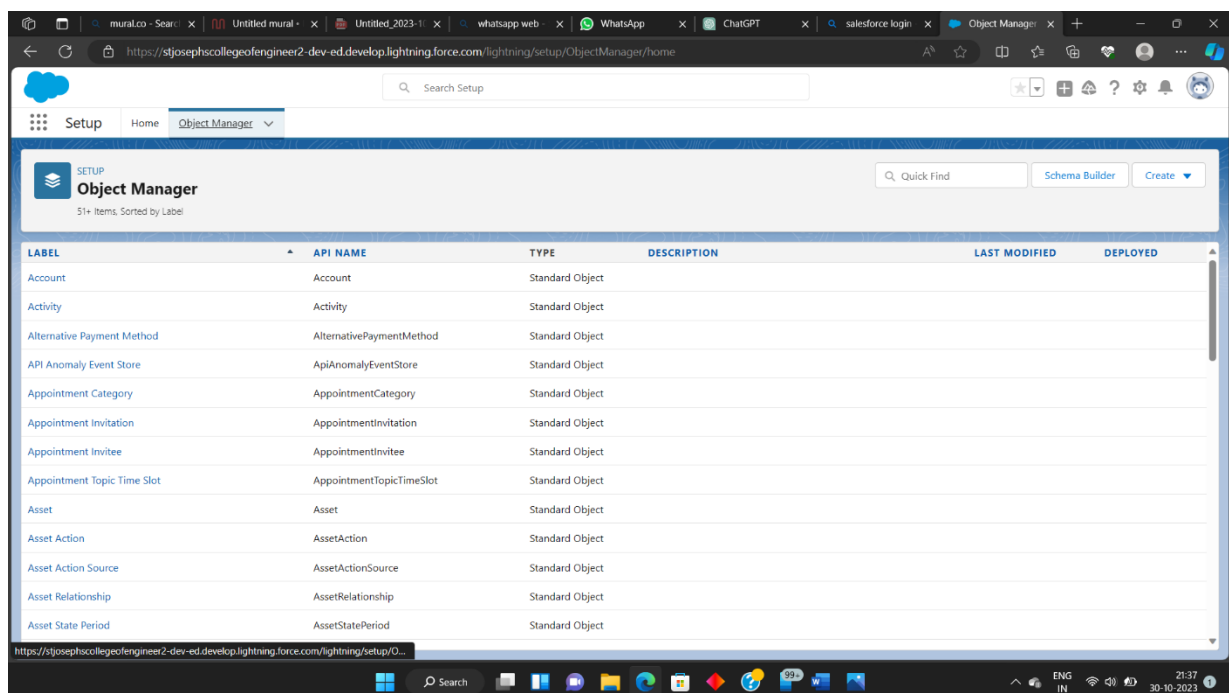
Activity 1:

To Create an object:

Creation of objects for vehicle Management, For this Vehicle Management we need to create 2 objects i.e vehicles, Driver.

The below steps will assist you in creating those objects.

- Click on the gear icon and then select setup.
- Click on the object manager tab just beside the home tab.



Milestone-3: Fields and Relationship

An object relationship in salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

Activity-1:

Creation of fields:

Fields in vehicles objects follow below data types:

The screenshot displays the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main heading is 'New Custom Object'. Below this, there is a message about permissions. The 'Custom Object Definition Edit' section is active, showing fields for 'Label', 'Plural Label', 'Object Name', and 'Description'. The 'Fields & Relationships' section is expanded, showing a table of fields for the 'vehicle' object.

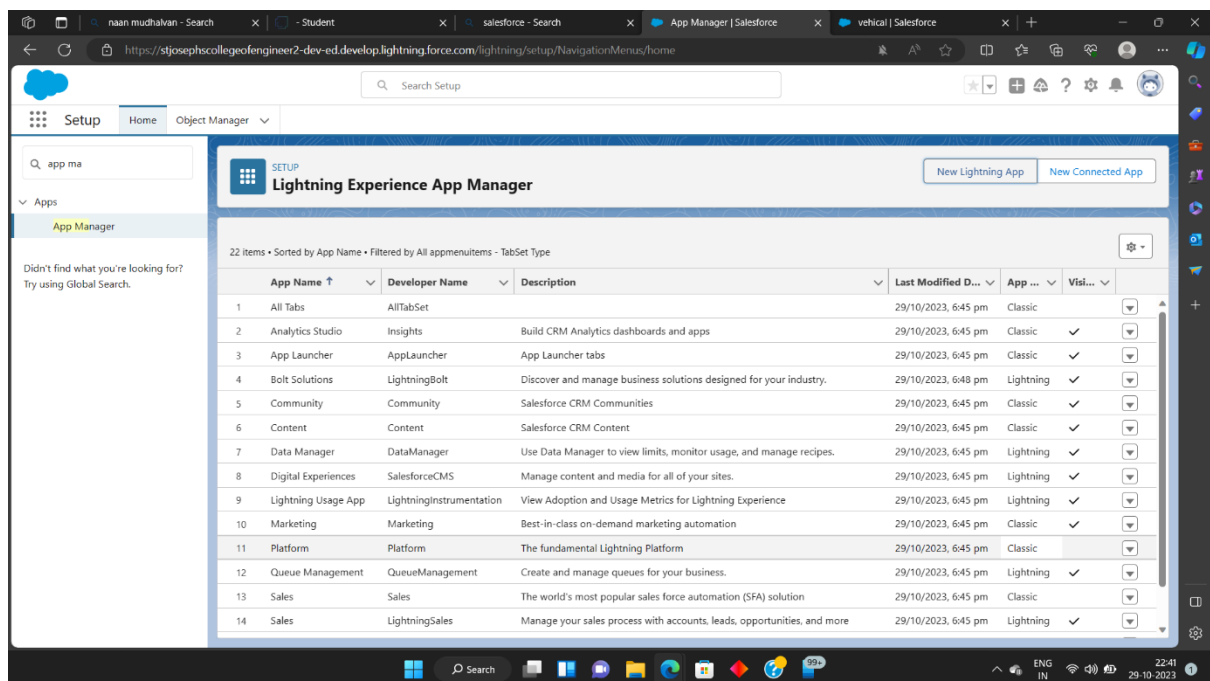
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
vehicle Name	Name	Text(80)		✓

Milestone-4: Lightning App

Apps in salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

Activity-1:

- Create the vehicle Management Construction 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.



- From Available item, select accounts, contacts, opportunities, vehicle, Driver, report, and dashboards and move them to selected items. Click next.
- From available profiles, select system administrator and move it to selected profile. Click Save & Finish
- To verify your changes, click the App Launcher, type Vehicle Management and select the Vehicle Management app

Note:

- 1.App Launcher-Displays available apps
- 2.App Name-Displays the current selected app
- 3.Navigation Menu-Displays the tabs available inside the app

Milestone-5: Profile

A profile is a group/collection of settings and permissions that define what a user can do a salesforce. A profile controls “Object permissions, User permissions. Tab setting, App setting, Apex class access, Visualforce page access, page layouts, Record Types, Login hour & Login IP ranges

Activity 1:

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

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.6
- Scroll down to custom object permission and give access for create, read, edit, delete, view all and modify all for Vehicle object and Drivers object.

To create a new profile:

Go to setup → type profiles in quick find box → click on profiles → clone the desired profile → enter profile name → save

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Setup Home Object Manager

profile

Users Profiles

Didn't find what you're looking for? Try using Global Search.

Profiles

Profile: **vehicle manager**

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Login IP Ranges [?] Enabled Apex Class Access [?] Enabled Visualforce Page Access [?] Enabled External Data Source Access [?] Enabled Named Credential Access [?] Enabled External Credential Principal Access [?] Enabled Custom Metadata Type Access [?] Enabled Custom Setting Definitions Access [?] Enabled Flow Access [?] Enabled Service Presence Status Access [?] Enabled Custom Permissions [?]

Profile Detail Edit Clone Delete View Users

Name	vehicle manager
User License	Salesforce
Description	Custom Profile
Created By	Naveen N. 29/10/2023, 10:44 pm
Modified By	Naveen N. 29/10/2023, 10:44 pm

Page Layouts

Global	Global Layout [View Assignment]	Object Milestone	Object Milestone Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Operating Hours	Operating Hours Layout [View Assignment]
Home Page Layout	DE Default [View Assignment]	Opportunity	Opportunity Layout [View Assignment]
Account	Account Layout [View Assignment]	Opportunity Product	Opportunity Product Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Order	Order Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Order Product	Order Product Layout [View Assignment]

salesforce login - Search x Profiles | Salesforce x

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Setup Home Object Manager

profile

Users Profiles

Didn't find what you're looking for? Try using Global Search.

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from. Required Information

Existing Profile	Analytics Cloud Integration User
User License	Analytics Cloud Integration User
Profile Name	vehicle manager

Save Cancel

Milestone-6: Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

Activity 1:

Creating a User:

1. From setup, in the quick find box, enter user, and then select users.
2. Click new user.
3. Enter the user's name 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.
4. Select a Role (vehicle manager)
5. Select a user License as salesforce.
6. Select a profile as vehicle manager.

The screenshot displays the Salesforce 'New User' setup page. The left sidebar shows the 'Setup' menu with 'Users' selected. The main content area is titled 'New User' and contains a 'User Edit' form. The form is divided into two sections: 'General Information' and 'Role'. The 'General Information' section includes fields for First Name (Naveen), Last Name (N), Alias (Naveen), Email, Username, Nickname, Title, Company, Department, and Division. The 'Role' section includes fields for Role (<None Specified>), User License (Salesforce), and Profile (<None-->). The 'Active' checkbox is checked. The 'Marketing User' checkbox is also checked. The 'Data.com User Type' dropdown is set to 'None--'. The 'Data.com Monthly Addition Limit' is set to 'Default Limit (300)'. The 'Accessibility Mode (Classic Only)' checkbox is checked. The 'High Contrast Palette on Charts' checkbox is checked. The 'Save' button is visible at the top right of the form.

Milestone-7: Reports

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. Every report is stored in a folder. Folders can be public, hidden, or shared, and can be set to read-only or read/write.

Activity 1:

Reports and Dashboards.

Go to Report and click New Report.

Select the Accounts, Contacts, and Vehicle report type and click start Report.

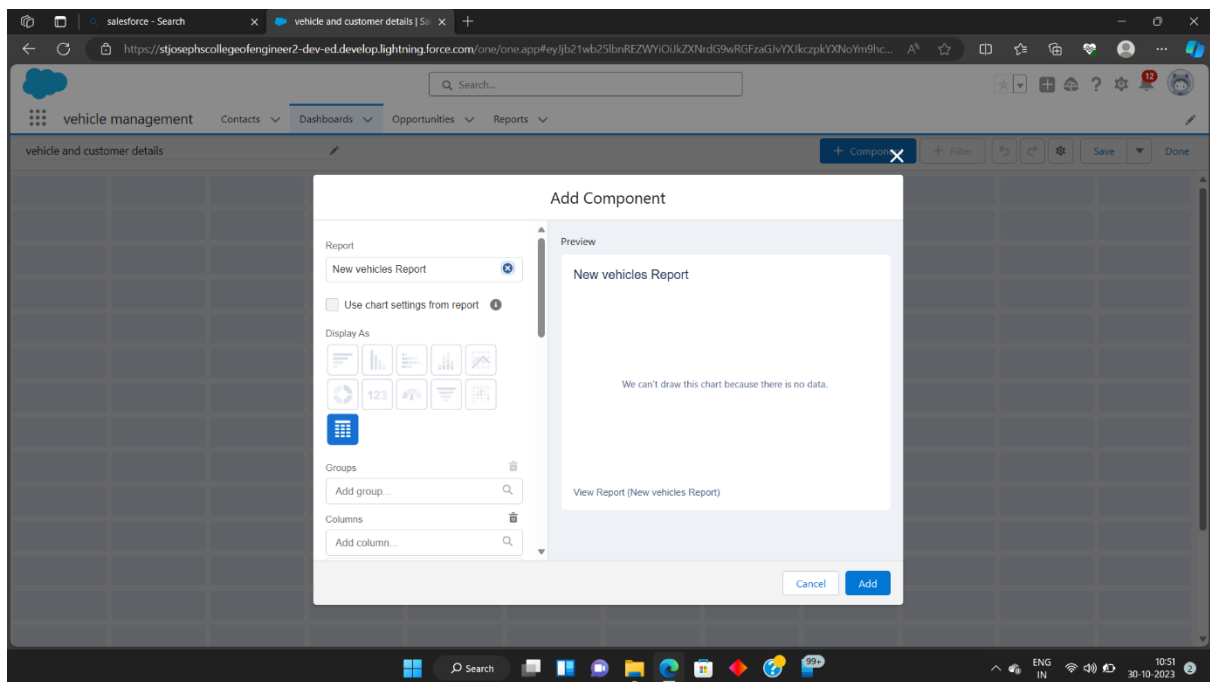
The screenshot shows the Salesforce Report Builder interface. The top navigation bar includes 'vehicle management', 'Contacts', 'Dashboards', 'Opportunities', and 'Reports'. The 'Reports' tab is active, showing a 'New Contacts & Accounts Report' with a 'Contacts & Accounts' report type. The interface includes a search bar, a 'Filters' button, and a 'Columns' list on the left. The main area displays a table of records with columns: Salutation, First Name, Last Name, Title, Account Name, Mailing Street, and Mailing City. The table contains 15 rows of data, including contact information for various companies like Edge Communications, Burlington Textiles Corp of America, and United Oil & Gas Corp.

	Salutation	First Name	Last Name	Title	Account Name	Mailing Street	Mailing City
1	Ms.	Rose	Gonzalez	SVP, Procurement	Edge Communications	313 Constitution Place Austin, TX 78767 USA	-
2	Mr.	Sean	Forbes	CFO	Edge Communications	312 Constitution Place Austin, TX 78767 USA	-
3	Mr.	Jack	Rogers	VP, Facilities	Burlington Textiles Corp of America	525 S. Lexington Ave	Burlington
4	Ms.	Pat	Stumuller	SVP, Administration and Finance	Pyramid Construction Inc.	2 Place Jussieu	Paris
5	Mr	Andy	Young	SVP, Operations	Dickenson plc	1301 Hoch Drive	Lawrenceville
6	Mr.	Tim	Barr	SVP, Administration and Finance	Grand Hotels & Resorts Ltd	2335 N. Michigan Avenue, Suite 1500 Chicago, IL 60601, USA	-
7	Mr.	John	Bond	VP, Facilities	Grand Hotels & Resorts Ltd	2334 N. Michigan Avenue, Suite 1500 Chicago, IL 60601, USA	-
8	Ms.	Stella	Pavlova	SVP, Production	United Oil & Gas Corp.	1303 Avenue of the Americas New York, NY 10019 USA	-
9	Ms.	Lauren	Boyle	SVP, Technology	United Oil & Gas Corp.	1304 Avenue of the Americas New York, NY 10019 USA	-
10	Ms.	Babara	Levy	SVP, Operations	Express Logistics and Transport	620 SW 5th Avenue Suite 400 Portland, Oregon 97204 United States	-
11	Mr.	Josh	Davis	Director, Warehouse Mgmt	Express Logistics and Transport	621 SW 5th Avenue Suite 400 Portland, Oregon 97204 United States	-
12	Ms.	Jane	Grey	Dean of Administration	University of Arizona	888 N Euclid Hallis Center, Room 501 Tucson, AZ 85721 United States	-
13	Mr.	Arthur	Song	CEO	United Oil & Gas Corp.	1301 Avenue of the Americas New York, NY 10019 USA	-
14	Ms.	Ashley	James	VP, Finance	United Oil & Gas, UK	Kings Park, 17th Avenue, Team Valley Trading Estate, Gateshead, Tyne and Wear NE26 3HS United Kingdom	-
15	Mr.	Tom	Ripley	Regional General Manager	United Oil & Gas, Singapore	9 Tagore Lane Singapore, Singapore 787472 Singapore	-

Activity 2:

Dashboard

1. Click the Dashboards tab.
2. Click New Dashboard.
3. Name the dashboard vehicle and Customer details and click create.
4. Click + Component.
5. Select the supplies report and click select.
6. Select the vertical Bar Chart component and click add.
7. Click Save and then Done.



The screenshot shows the Salesforce 'Contacts' list in 'Intelligence View'. At the top, there are summary statistics: Total Contacts (20), No Activity (20), Idle (0), No Upcoming (0), Overdue (0), Due Today (0), and Upcoming (0). Below this is a table with 20 items, filtered by Created Date, Me, and Total Contacts. The table has columns for Name, Title, Account Name, Last Activity, and Actions.

	Name	Title	Account Name	Last Activity	Actions
1	Rose Gonzalez	SVP, Procurement	Edge Communications		[Email] [Phone] [Dropdown]
2	Sean Forbes	CFO	Edge Communications		[Email] [Phone] [Dropdown]
3	Jack Rogers	VP, Facilities	Burlington Textiles Corp of America		[Email] [Phone] [Dropdown]
4	Pat Stummiller	SVP, Administration and Finance	Pyramid Construction Inc.		[Email] [Phone] [Dropdown]
5	Andy Young	SVP, Operations	Dickenson plc		[Email] [Phone] [Dropdown]
6	Tim Barr	SVP, Administration and Finance	Grand Hotels & Resorts Ltd		[Email] [Phone] [Dropdown]
7	John Bond	VP, Facilities	Grand Hotels & Resorts Ltd		[Email] [Phone] [Dropdown]
8	Stella Pavlova	SVP, Production	United Oil & Gas Corp.		[Email] [Phone] [Dropdown]
9	Lauren Boyle	SVP, Technology	United Oil & Gas Corp.		[Email] [Phone] [Dropdown]

vehicle management

vehicle and customer details

New Contacts & Accounts Report

Salut--	Firs--	Las--	Title	Account Name
Mr.	Tom	Riple	Regional General Manager	United Oil & Gas, Singapore
Mr.	Sean	Forbes	CFO	Edge Communications
Mr.	Jack	Rogers	VP, Facilities	Burlington Textiles Corp of America
Mr.	Tim	Barr	SVP, Administration and Finance	Grand Hotels & Resorts Ltd

View Report (New Contacts & Accounts Report)

vehicle management

Reports

Recent

4 items

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New vehicles Report		Private Reports	Naveen N	30/10/2023, 3:03 pm	
Created by Me	New vehicles Report		Private Reports	Naveen N	30/10/2023, 10:47 am	
Private Reports	New Contacts & Accounts Report		Private Reports	Naveen N	30/10/2023, 2:58 pm	
Public Reports	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	29/10/2023, 6:45 pm	

FOLDERS

- All Folders
- Created by Me
- Shared with Me

FAVORITES

- All Favorites

Home xtrave xwhat x(S) W xsmar xSales xStud xsales xSign xSearc xbuild xsales xvehic x

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Search...

vehicle managementContactsDashboardsOpportunitiesReports

Dashboard

vehicle and customer details

RefreshEditSubscribe

As of 30-Oct-2023, 3:04 pm Viewing as Naveen N

New Contacts & Accounts Report

Salut...	Firs...	Las...	Title	Account Name
Mr.	Tom	Ripley	Regional General Manager	United Oil & Gas, Singapore
Mr.	Sean	Forbes	CFO	Edge Communications
Mr.	Jack	Rogers	VP, Facilities	Burlington Textiles Corp of America
Mr.	Tim	Barr	SVP, Administration and Finance	Grand Hotels & Resorts Ltd

1 to 4 of 4 records

View Report (New Contacts & Accounts Report)

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SearchENG IN15:0430-10-2023