VEHICLE MANAGEMENT SYSTEM USING SALESFORCE

Project Based Experiential Learning Program

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 the form of messages and mails.

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 these questions, 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 your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

https://youtu.be/r9EX3lGde5k

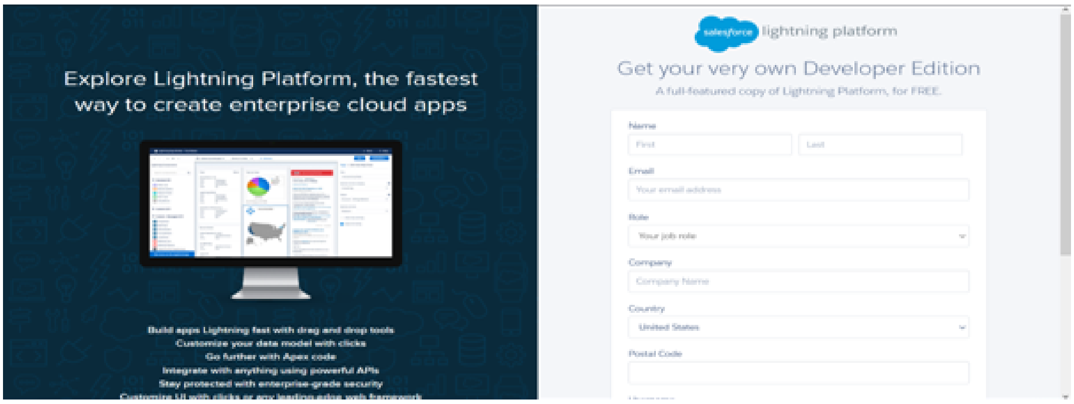
Activity 1:

Creating Developer Account
Creating a developer org in salesforce.

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

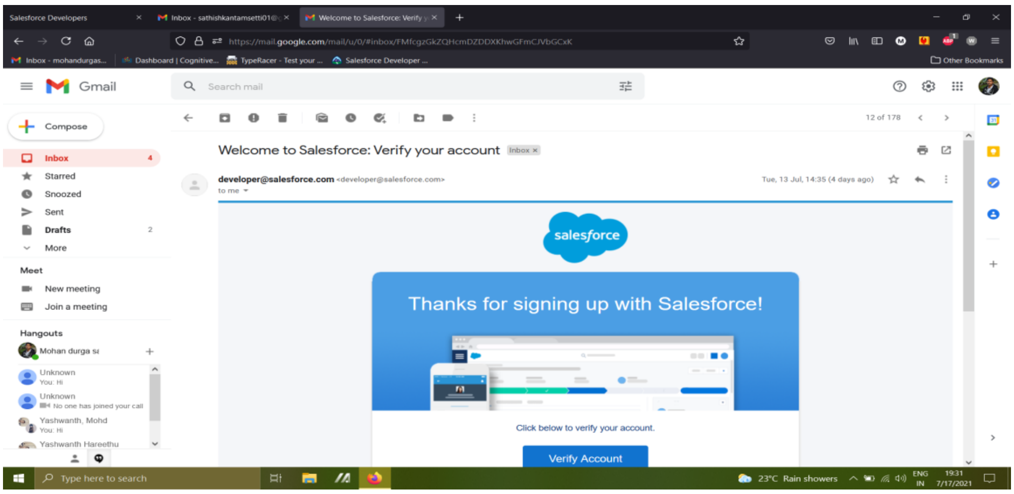
c. Company : College Name
d. County : India
e. Postal Code : pin code
f. Username : should be a combination of your name and company
This need not be an actual email id, you can give anything in the format : username@organization.com

Click on sign up after filling these.



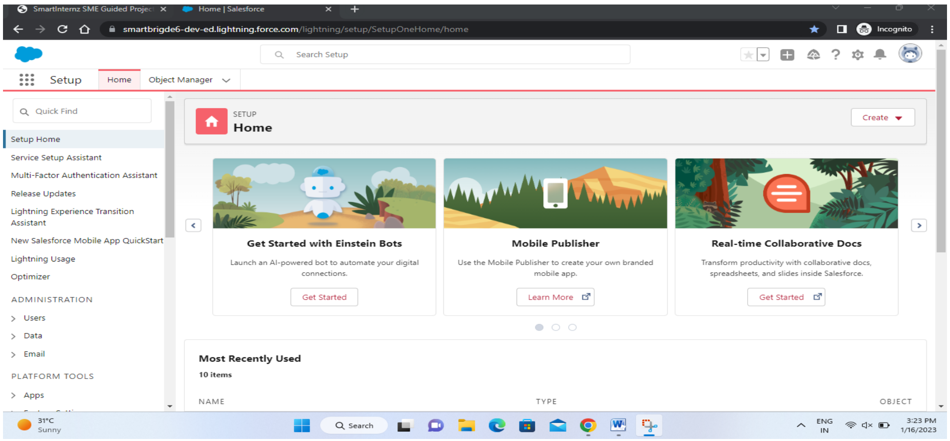
Account Activation

Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins, as



Login To Your Salesforce Account

1.Go to salesforce.com and click on login.
2.Enter the username and password that you just created.
3.After login this is the home page which you will see.



Salesforce Login

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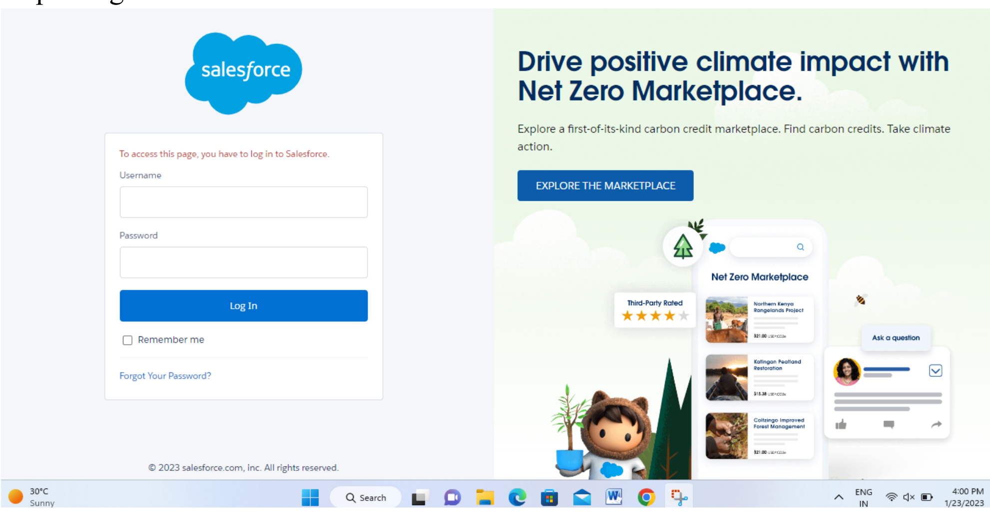


Milestone-2:Object

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:

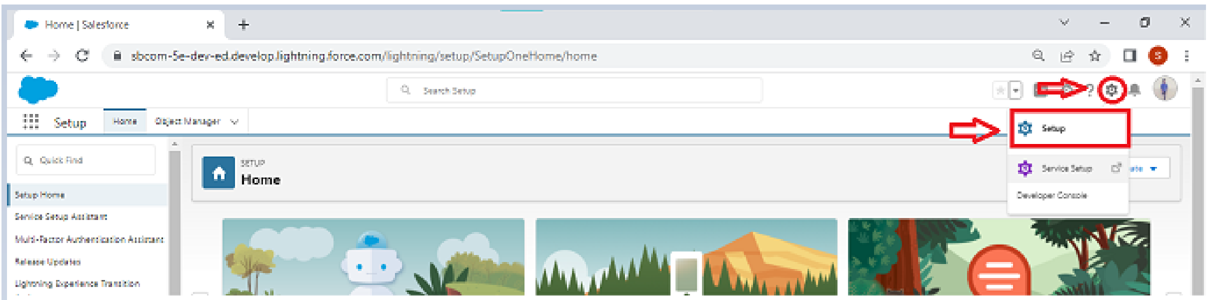
To Create an object:
Creation of Objects for Vehicle Management, For this Vehicle Management we need to create 2 objects i.eVehicles,Driver.
The below steps will assist you in creating those objects.

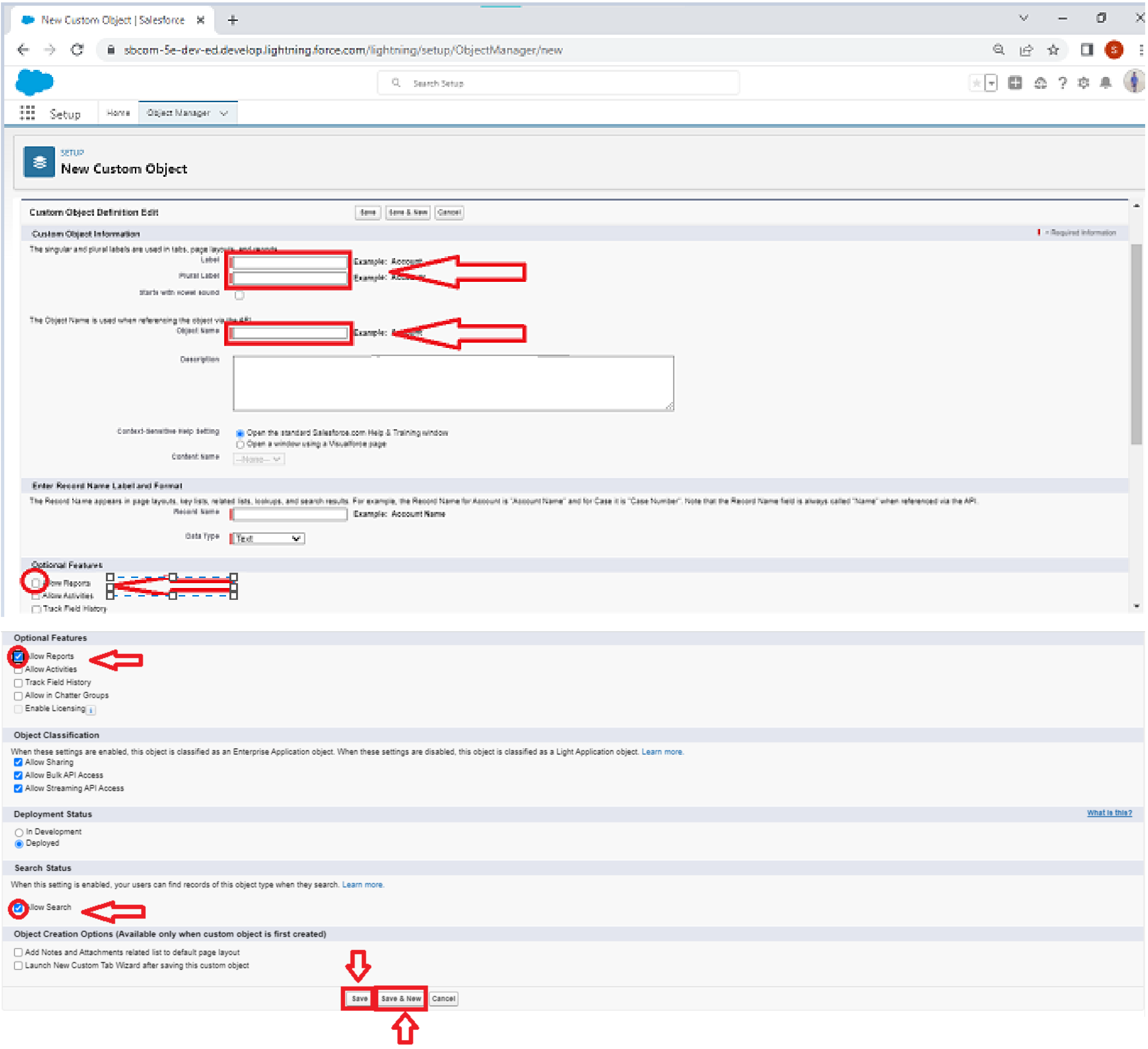
- Click on the gear icon and then select Setup.
- Click on the object manager tab just beside the home tab.

- After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
- Creation of Vehicle Object

On the Custom Object Definition page, create the object as follows:

- Label: Vehicle
- Plural Label: Vehicles
- Record Name: Vehicle Name
- Check the Allow Reports checkbox
- Check the Allow Search checkbox
- Click Save.
- Now create a custom tab. Click the Home tab, enter Tabs in Quick Find and select Tabs.
- Under Custom Object Tabs, click New.
- For Object, select Vehicle.
- For Tab Style, select any icon.
- Leave all defaults as is. Click Next, Next, and Save.





Activity 2:

To Create a driver object continue the same steps Which is followed for the above object.

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:

S NO.	Field Names	Data Types
1.	Customer Name	Text
2	Customer Mobile No	Number
3	Vehicle Type i)2 wheeler ii)4 wheeler	Picklist
4.	2WHEELERS i) HERO ii)HONDA iii)BAJAJ iv)ROYAL ENFIELD v)TVS vi)KINETIC vii)OLA viii)JAWA ix)SD x)BATTERY	Picklist
5	4WHEELERS i) RENAULT ii)SKODA iii) HONDA iv)HYUNDAI v)SUZUKI	Picklist

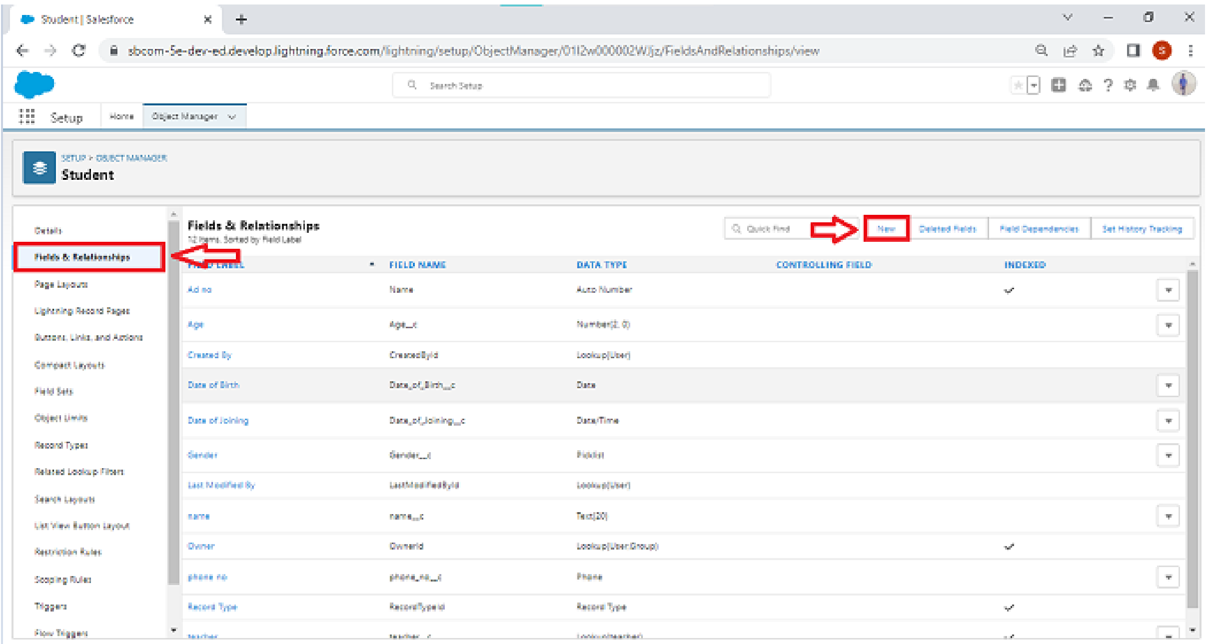
	vi)MAHINDRA vii)VOLKSWAGEN viii)BENZ ix)AUDI x)VOLVO	
6.	Vehicle Name	Text
7.	Vehicle No	Text
8.	Chassic No	Text
9.	Colour	Text
10.	Body Type	Text
11.	Vehicle Includes i)Fire Extenuation ii)First Aid Kit iii)Multi Charger kit iv)Stepney v)Stereo vi)Tool Kit vii)Tracking Device viii)Tyre Jack	Multi Picklist
12.	Condition i)Good ii)Medium iii)Least	Picklist
13	Mileage	Text
14	Seats	Number
15	Start Date	Date/Time
16	End Date	Date/Time
17	Opportunity	Lookup(opportunities)

Activity-2:

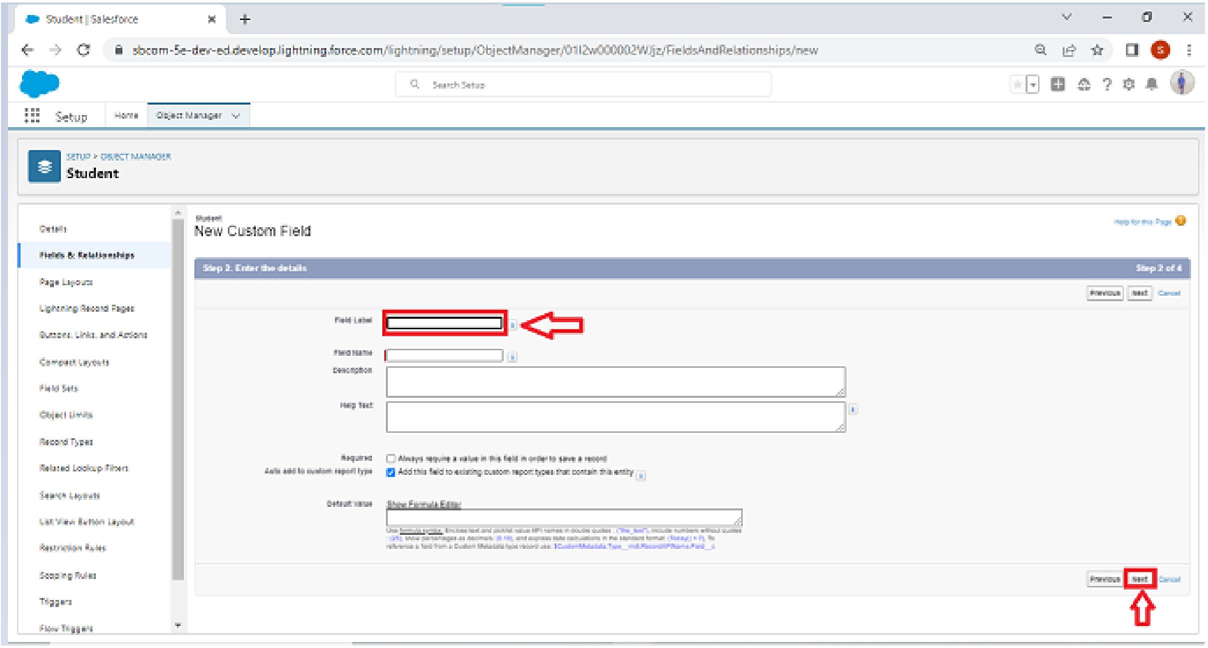
Fields in Driver objects follow below data types:

S No	Field	Data Type
1	Driver Name	Text
2	Licence No	Text
3	Mobile No	Number
4	Fair Per Hour	Text
5	Vehicle	Lookup(Vehicle)

Now click on “Fields & Relationships” → New



Fill the field label name → Next → Next → Save.



Activity-3:

Fields In Driver Object:

Create a dependency between these two picklists, so that when a Vehicle type is selected, only respective 2Wheeler Brands are available in the 2Wheeler field, Similarly for 4 wheelers.
The below steps will assist you in creating Field Dependencies.

- Click on the gear icon and then select Setup.
- Click on the object manager tab just beside the home tab.
- After the above steps, Select Vehicles Object
- Now Select Fields and relationships from setup menu of the vehicle object.
- Click Field Dependencies.
- Click New.
- Select Vehicle Type as the Controlling Field and select 2wheelers as the Dependent Field.
- Click Continue.
- Select the appropriate 2 wheelers Brands in each column by double-clicking them.
- 2WHEELERS :i) HERO
  ii)HONDA
  iii)BAJAJ
  iv)ROYAL ENFIELD
  v)TVS
  vi)KINETIC
  vii)OLA

viii)JAWA
ix)SD
x)BATTERY

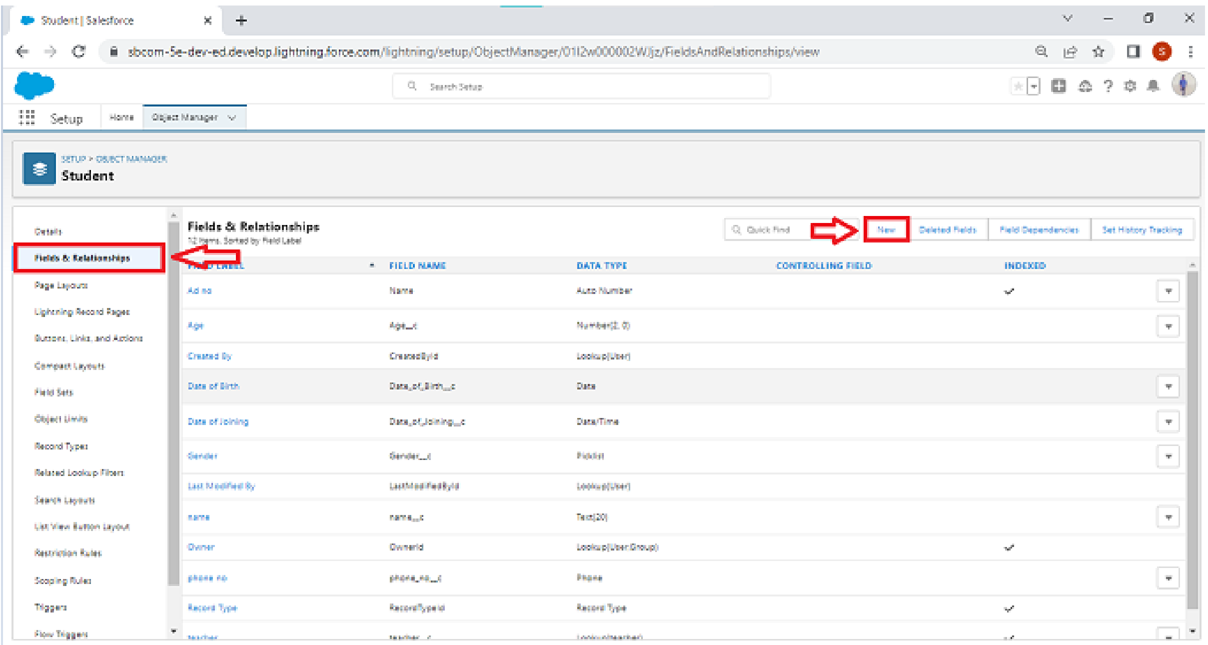
- Click Include Values.
- Click Preview, then test the dependency by selecting different Vehicle Type and viewing the different Vehicles available for Vehicle Type.
- Click Close to close the preview window.
- Click Save.

Follow same steps for 4wheelers also

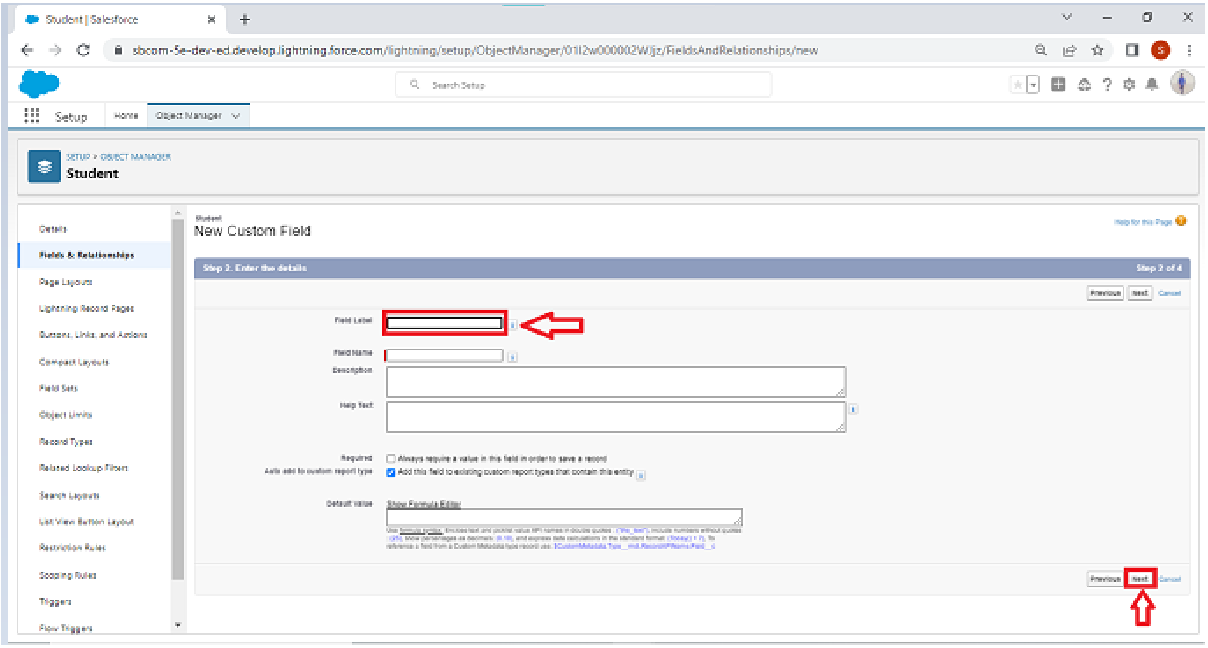
- Vehicle Type as the Controlling Field and select 4wheelers as the Dependent Field.
- Click Continue.
- Select the appropriate 4wheelers Brands in each column by double-clicking them.
- 4WHEELERS : i) RENAULT
  ii)SKODA
  iii) HONDA
  iv)HYUNDAI
  v)SUZUKI
  vi)MAHINDRA
  vii)VOLKSWAGEN
  viii)BENZ
  ix)AUDI
  x)VOLVO

- Click Include Values.
- Click Preview, then test the dependency by selecting different Vehicle Type and viewing the different Vehicles available for Vehicle Type.
- Click Close to close the preview window.
- Click Save.

Now click on “Fields & Relationships” → New



Fill the field label name → Next → Next → Save.



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:

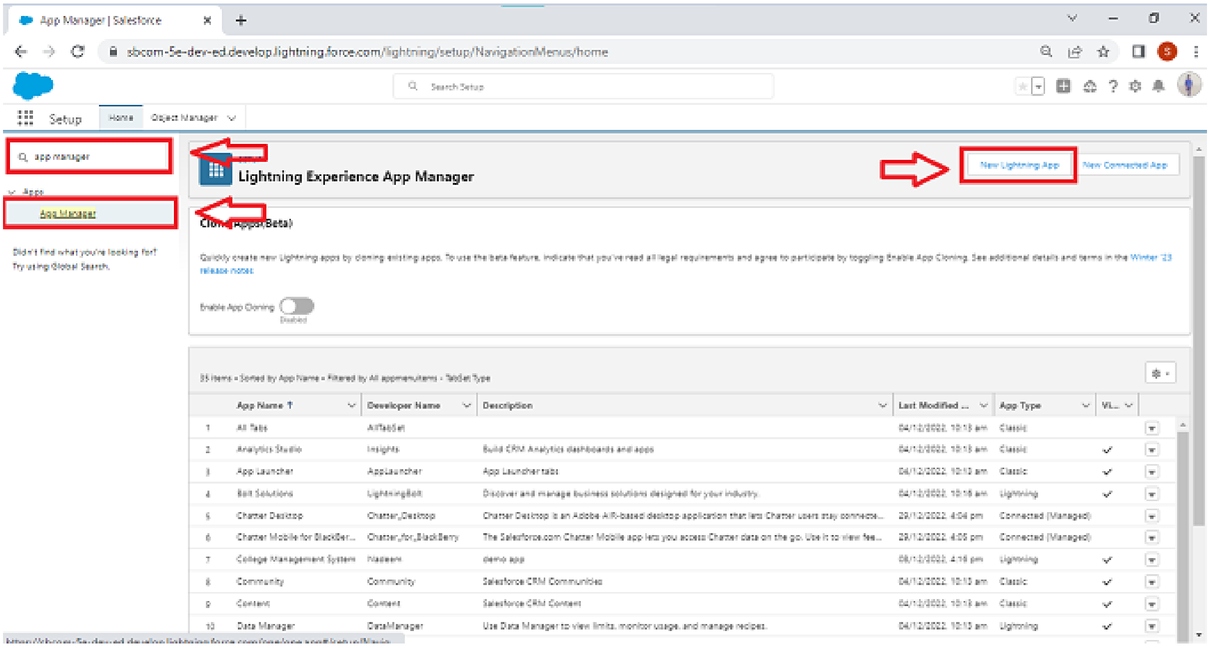
Create the Vehicle Management Construction app

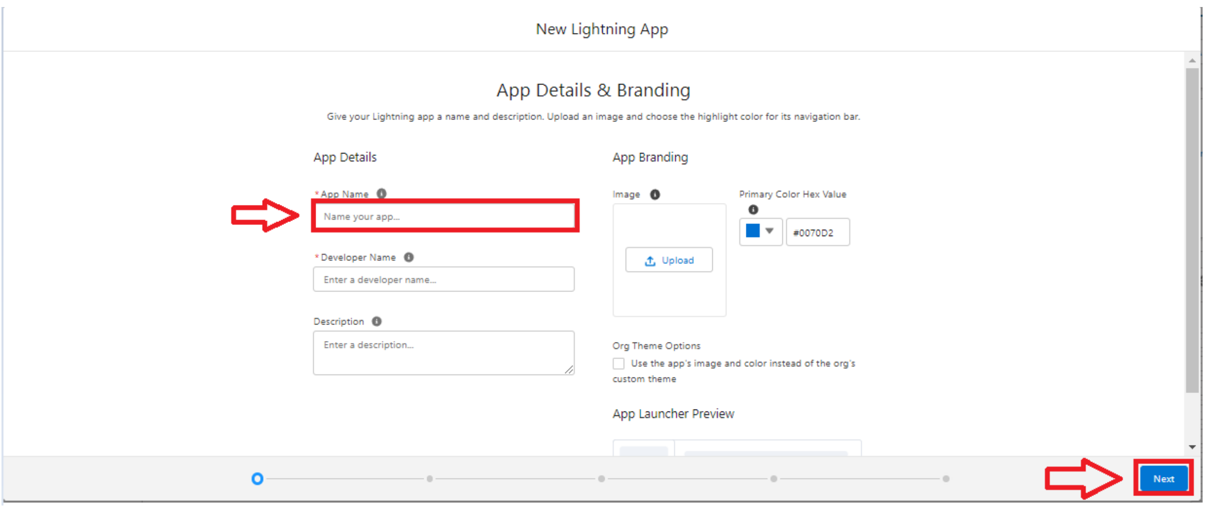
- From Setup, enter App Manager in the Quick Find and select App Manager.
- Click New Lightning App. Enter Vehicle Management as the App Name, then click Next
- Under App Options, leave the default selections and click Next.
- Under Utility Items, leave as is and click Next.

- From Available Items, select Accounts,Contacts,Opportunities,Vehicle, Driver,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.

Note:

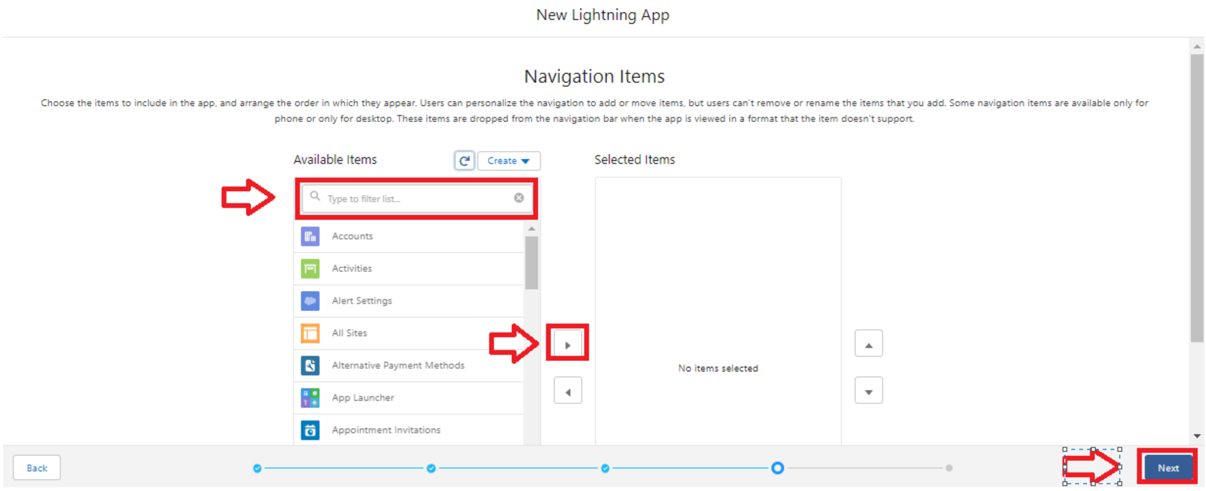
1. App Launcher-Displays available apps.
2. App Name-Displays the current selected app.
3. Navigation menu-Displays the tabs available inside the app.



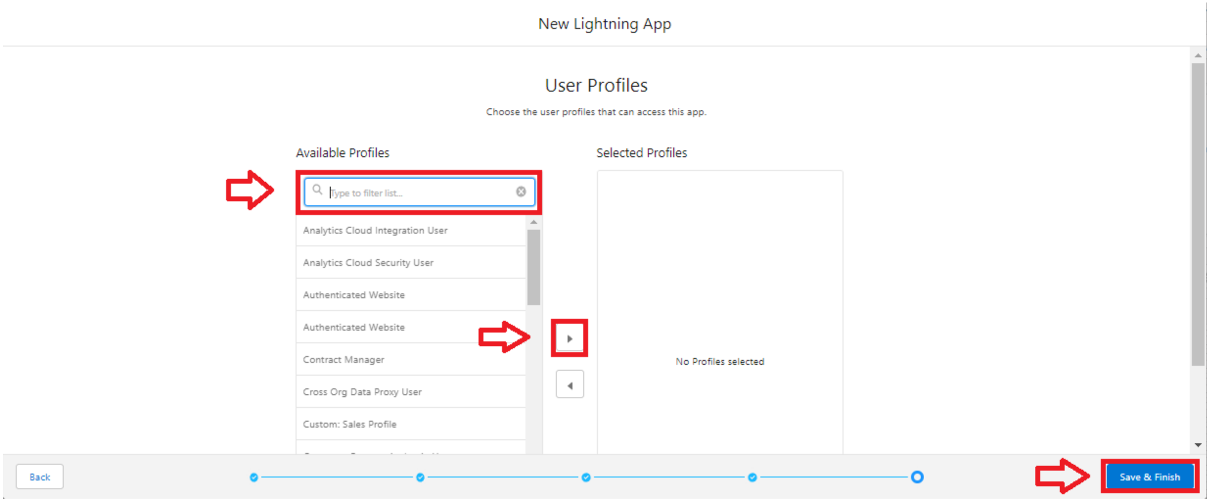


To Add Navigation Items:

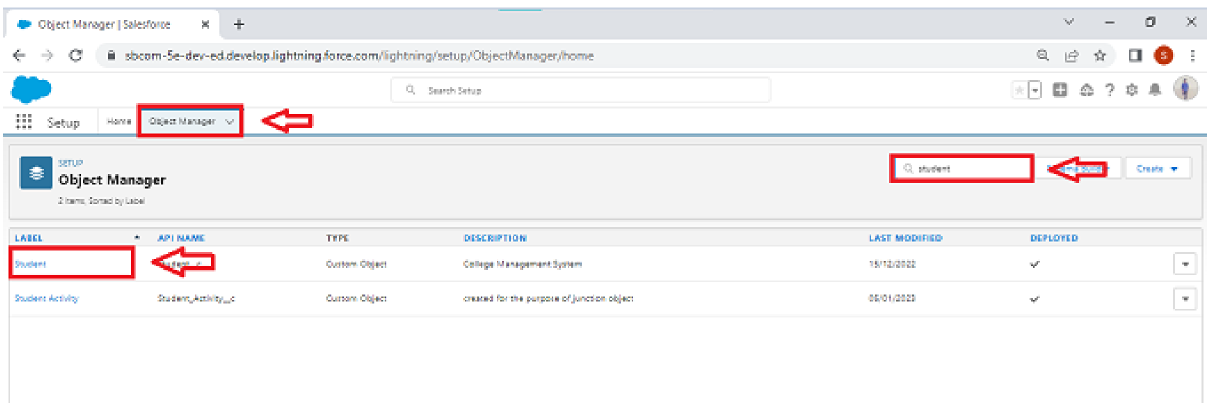
Select the items from the search bar and move it using the arrow button → Next.



To Add User Profiles:
Search profiles in search bar → click on the arrow button → save & finish.



To create fields in an object:
Go to setup → click on Object Manager → type object name in search bar → click on the object.



Milestone-5: Profile

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

Activity 1:

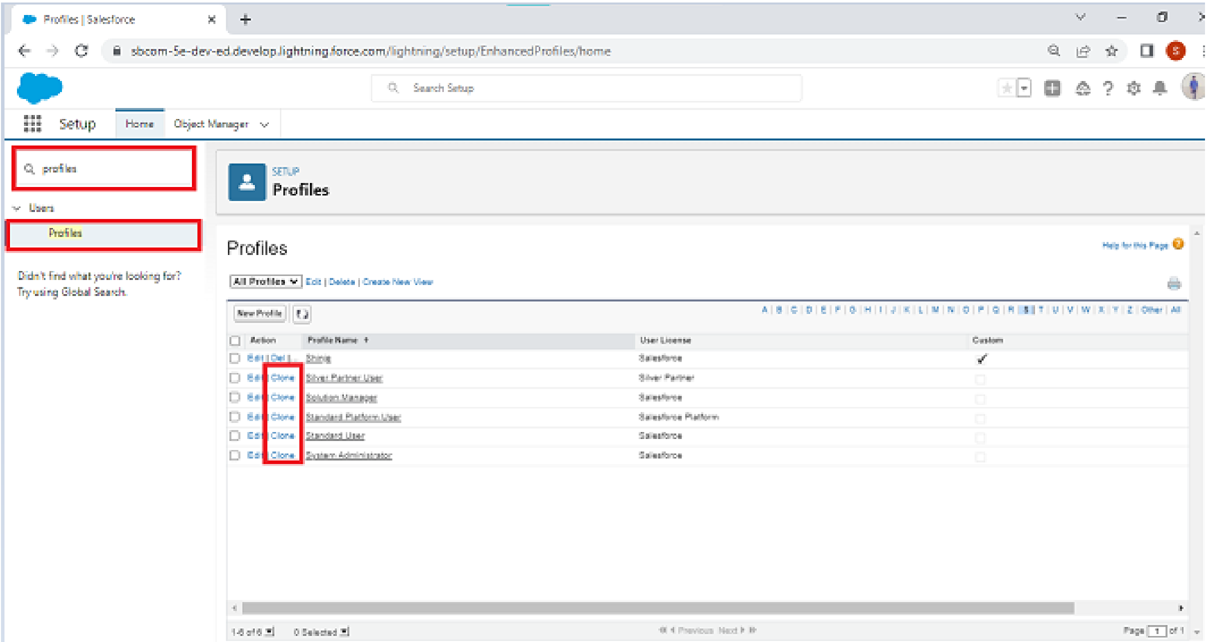
Creating a Profiles: Now create a Vehicle Manager profile and set its object permissions.

Creating a Profiles:

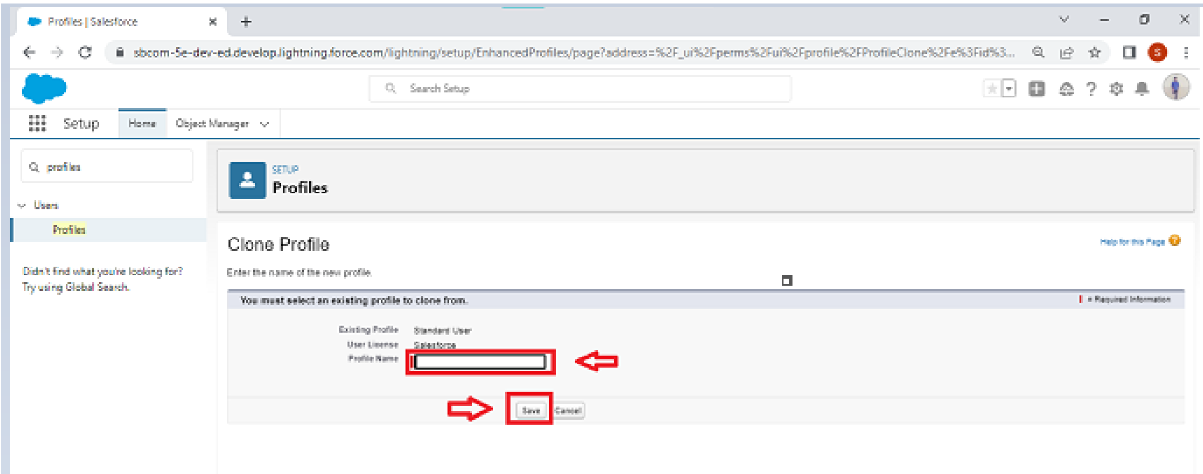
Now create a Vehicle Manager profile and set its object permissions.

- 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,Delete,View all and modify all for Vehicle object and Drivers object.

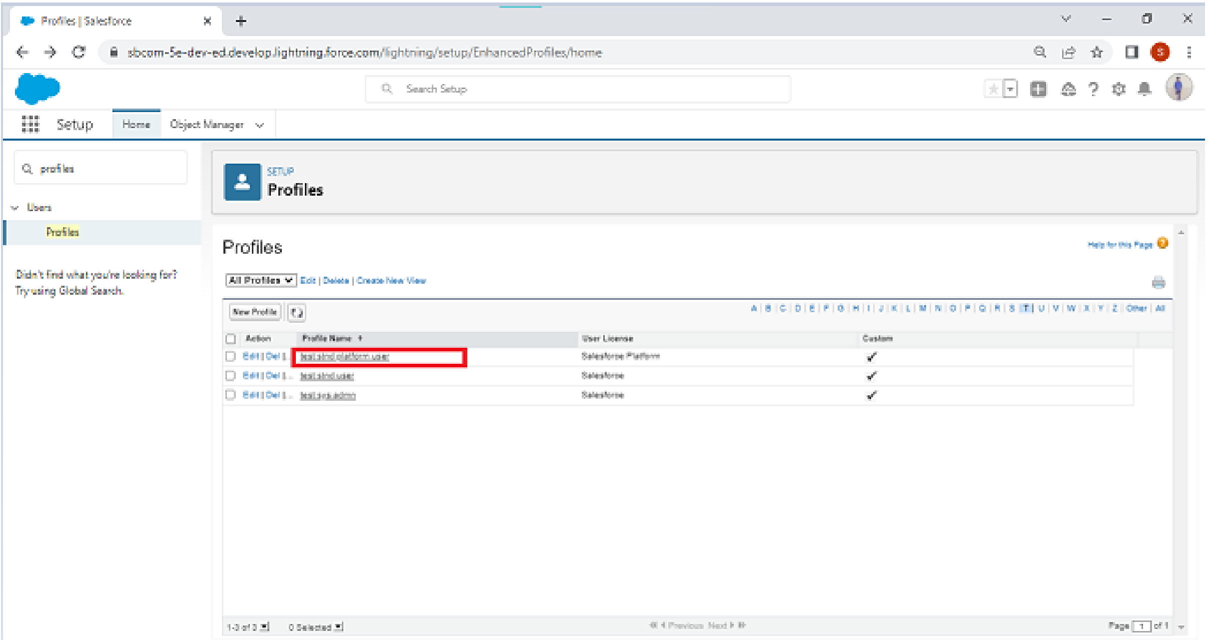
To create a new profile:
Go to setup → type profiles in quick find box → click on profiles → clone the desired profile (standard user is preferable) → enter profile name → save



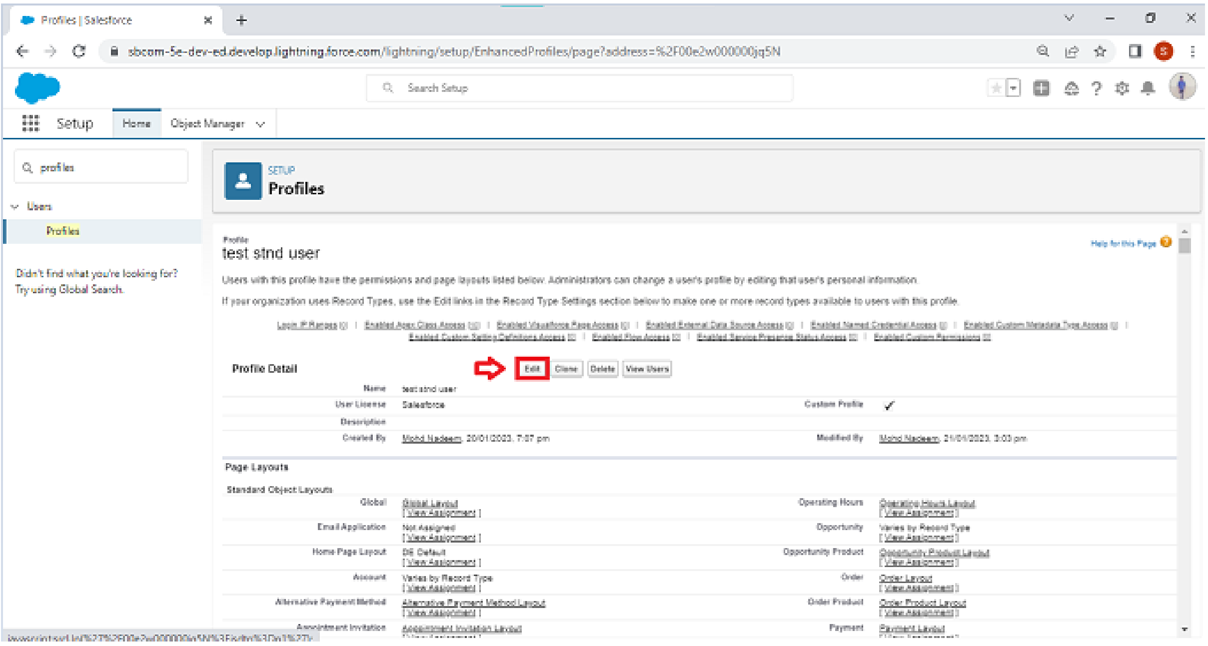
Enter a Profile Name



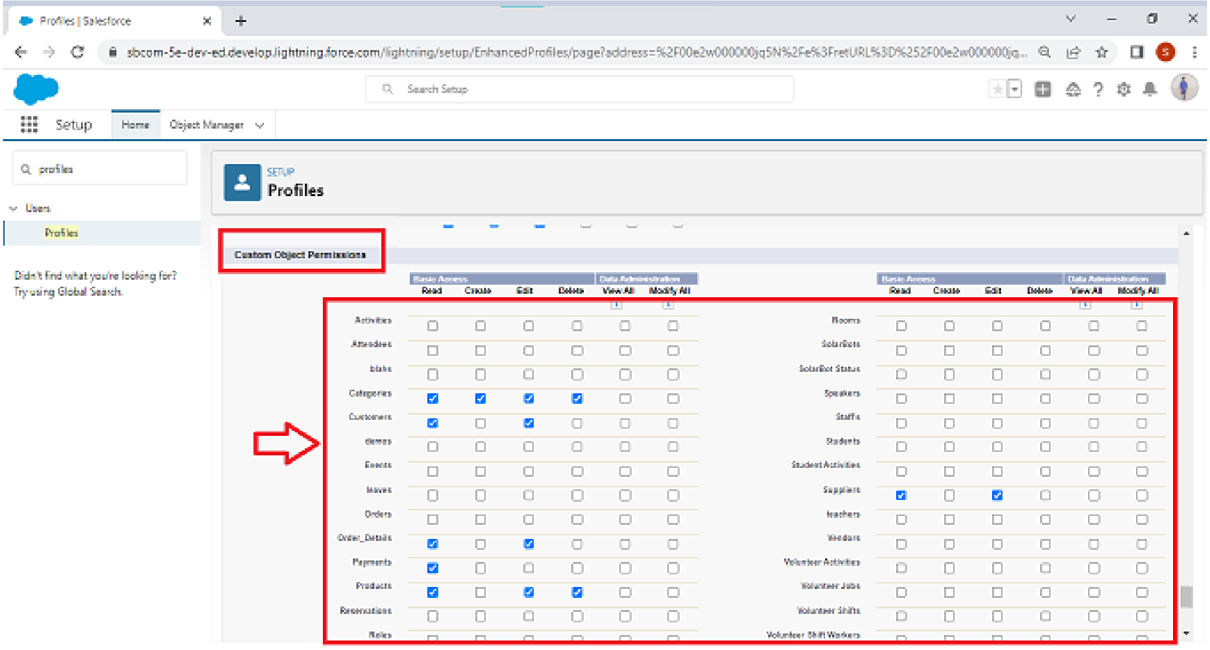
Click on the new created profile



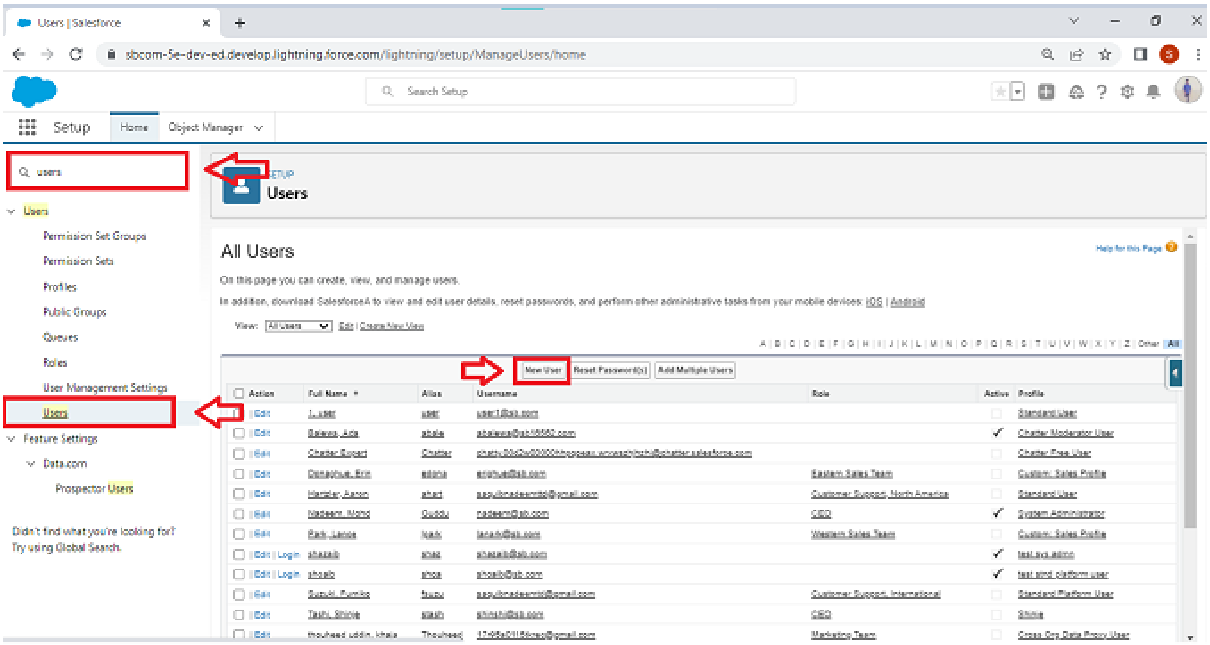
While still on the profile page, then click Edit.



Scroll down to Custom Object Permissions and Give view all access permissions and assign to the parent profile



Similarly Create operator profile ,Clone Salesforce Platform user and give access only for Vehicles object.



Setup Roles:

1. Click on the Gear Icon

2. Click "Setup"

3. In the Quick Find box, enter "Roles"

4. Click "Roles"

5. Click on "Set Up Roles"

6. Click "Expand All"

7. Under the CEO, click on "Add Role"

8. Fill up the Label as Vehicle Manager, Role Name Vehicle_Manager.

9. Enter a Role name that will be displayed on Reports

10. Click on Save .

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

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.

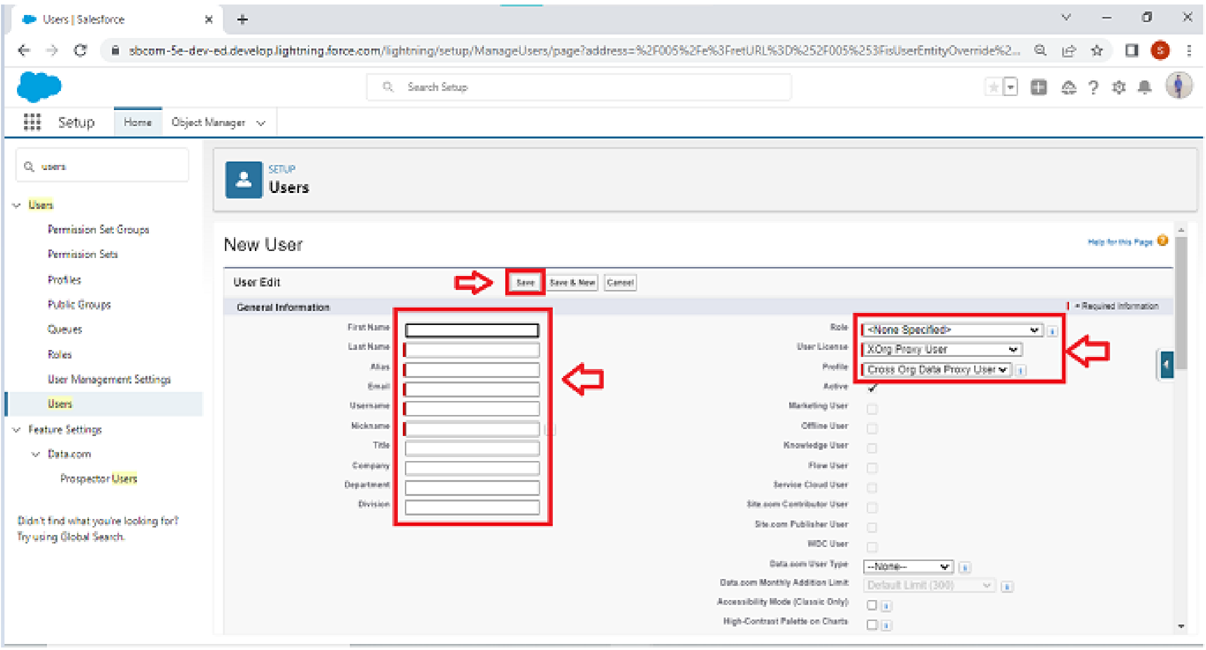
Activity 1:

Creating a Users:

1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User.
3. 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.
4. Select a **Role**(Vehicle Manager)
5. Select a User Licence As salesforce.
6. Select a profile as Vehicle Manager.

7. Check Generate new password and notify the user immediately to have the user's login name and a temporary password emailed to your email.

Fill in the fields (first name, last name, alias, email id, username, nick name, role, user license, profiles) → save.



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

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 Reports and click New Report.
- Select the Accounts,Contacts and Vehicle report type and click Start Report.

- To begin filtering, click Filters.
- Click the Show Me standard filter and select My Contacts. Click Apply.
- Click on add columns add Vehicle:Vehicle name, Vehicle:Customer id, Vehicle:Customer name,Vehicle:Customer Number,Vehicle:Chassis Number.
- Click Save.
- Save your report as Vehicle and Customer Details and accept the auto-generated unique name.

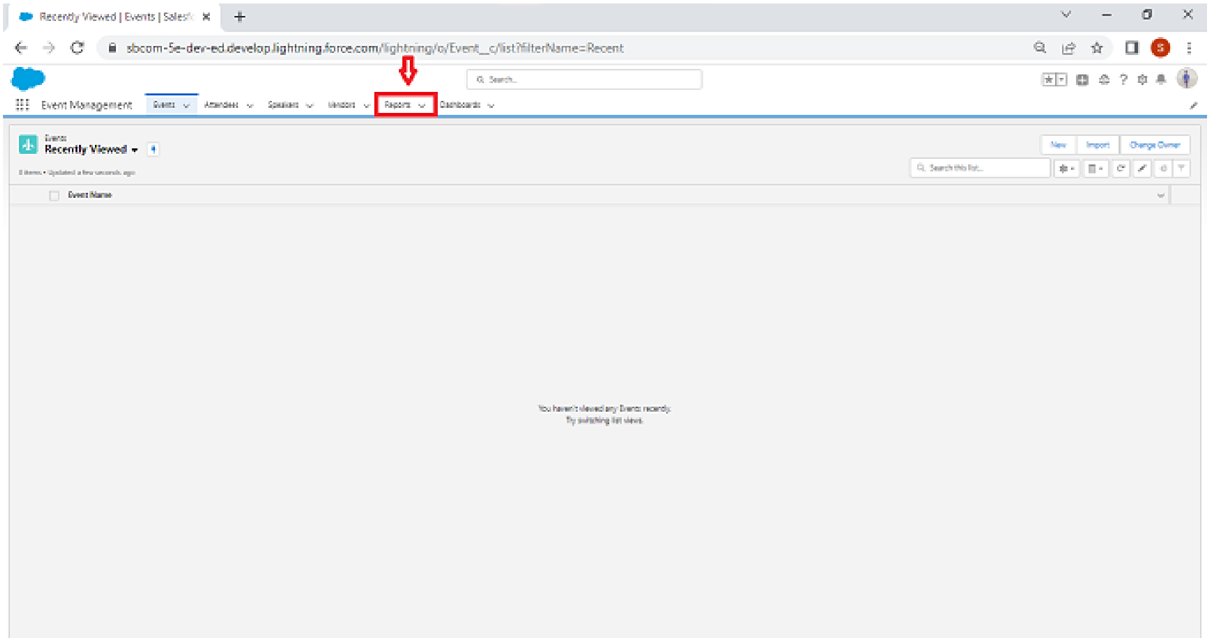
Activity 2:

Dashboard:

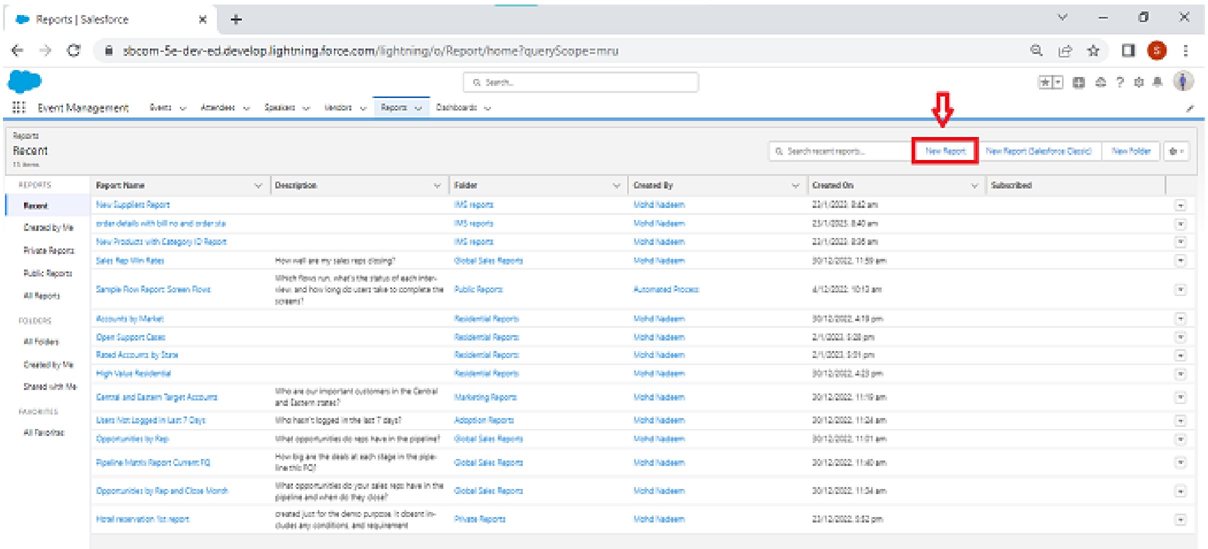
1. Click the Dashboards tab.
2. Click New Dashboard.
3. Name the dashboard Vehicle and Customer Details and click Create.
4. Click +Component.
5. Select the Supplies report and click Select.
6. Select the Vertical Bar Chart component and click Add.
7. Click Save and then Done.

To create a report:

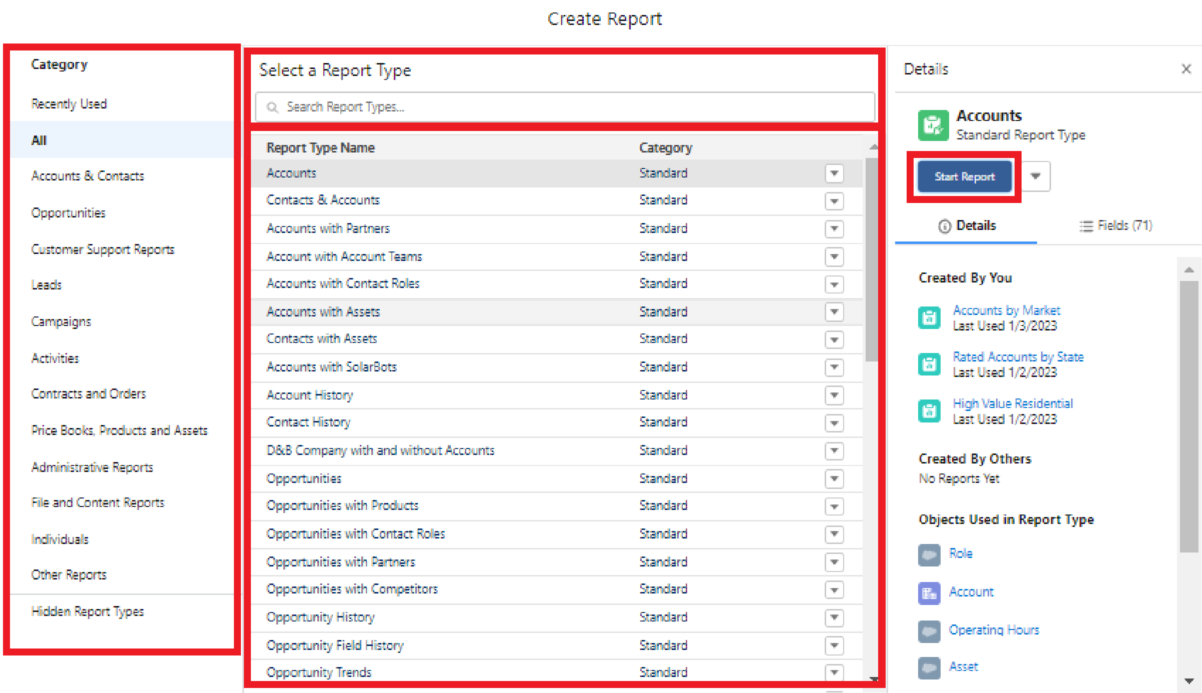
Go to the app → click on the reports tab



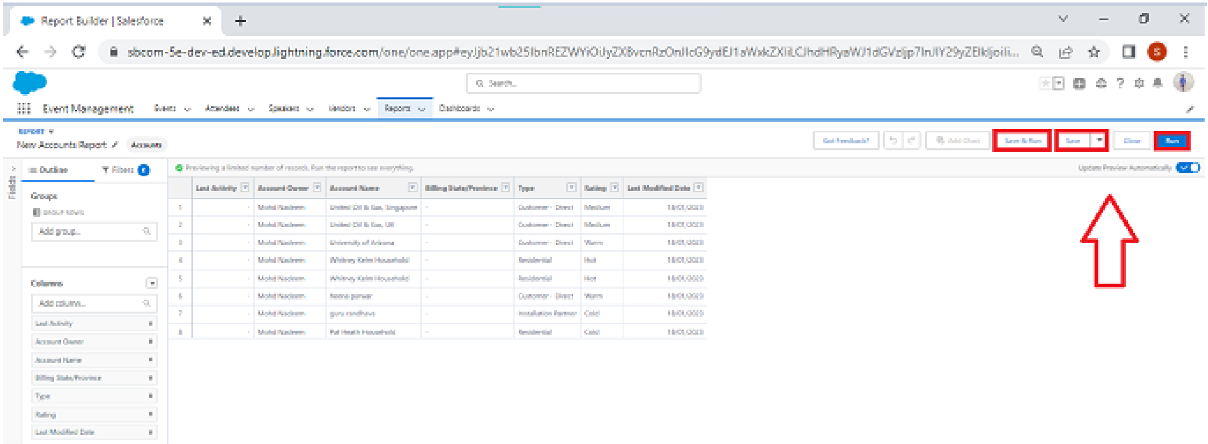
Click New Report



Select report type from category or from report type panel or from search panel → click on start report.



Customize your report, then save or run it.


Report Builder | Salesforce
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Event Management
New Accounts Report
Outline
Groups
Add group...
Columns
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Last Activity
Account Owner
Account Name
Billing State/Province
Type
Rating
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