

## Vehicle Management System Using Salesforce

Vehicle Management is an application where 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.

1.Go to [developers.salesforce.com/](https://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

d.Company : College Name

e.County : India

f.Postal Code : pin code

g.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

## To Create An Object

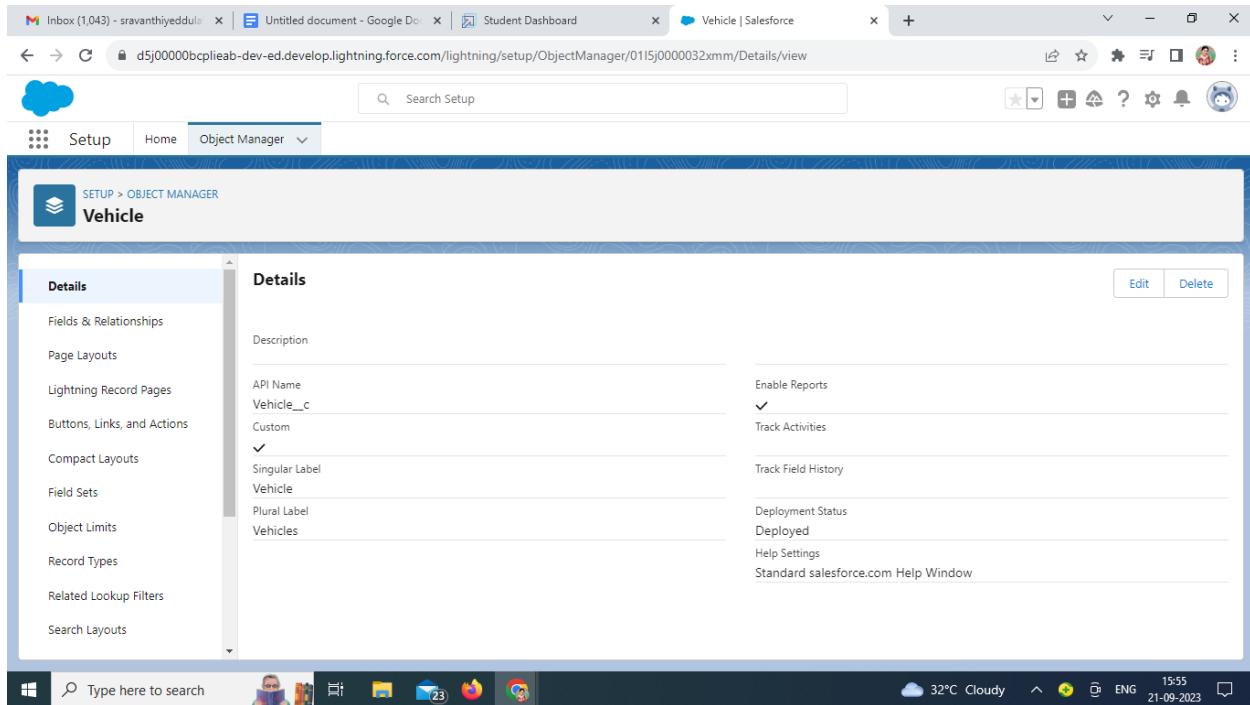
The below steps will assist you in creating those objects.

- 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.

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.



## To Create The Driver Object

For this Vehicle Management we need to create three custom objects i.e. Vehicles, Driver and Traveler.

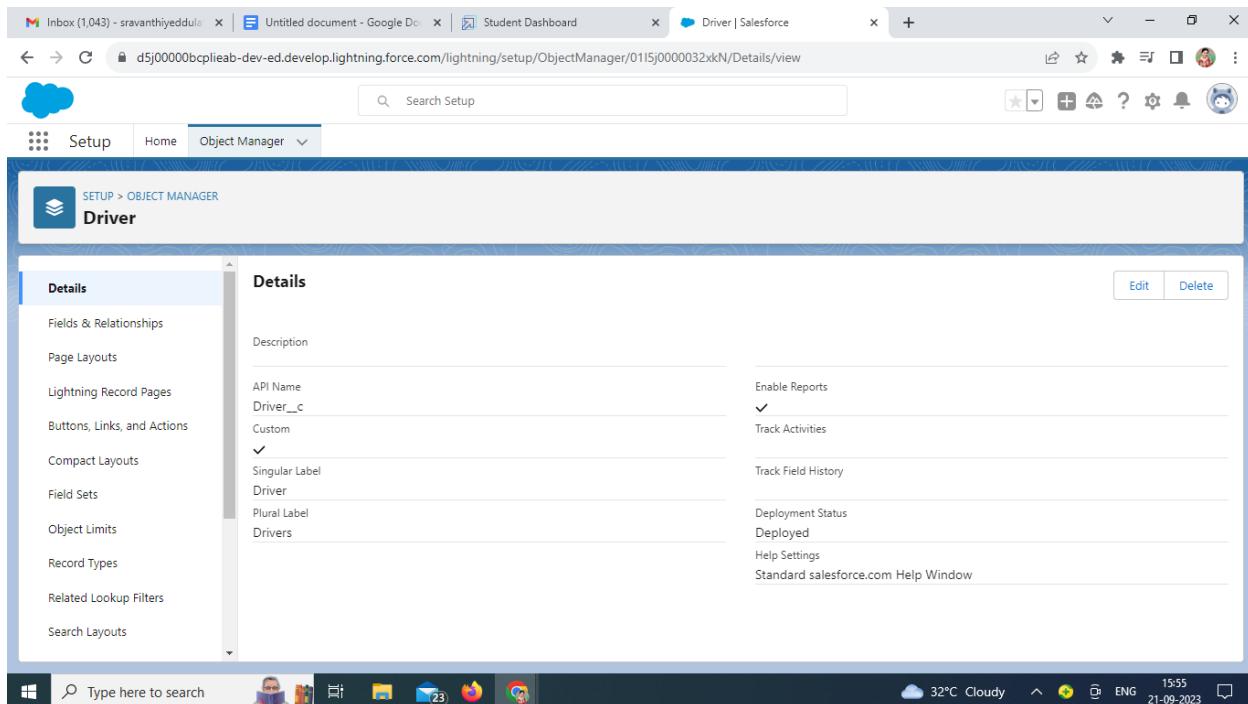
The below steps will assist you in creating those objects.

- 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.

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

- Label: Driver
- Plural Label: Drivers
- Record Name: Driver 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 Driver.
- For Tab Style, select any icon.
- Leave all defaults as is. Click Next, Next, and Save.



## To Create The Traveler Object

For this Vehicle Management we need to create three custom objects i.e. Vehicles, Driver and Traveler.

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.

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

- Label: Traveler
- Plural Label: Travelers
- Record Name: Traveler 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 Traveler.
- For Tab Style, select any icon.
- Leave all defaults as is. Click Next, Next, and Save.

The screenshot shows the Salesforce Setup interface. The user is navigating through the 'Object Manager' for the 'Traveler' object. On the left, a sidebar lists various setup categories such as Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main 'Details' tab is selected, displaying the following configuration details:

Details	
Description	
API Name	Traveler__c
Custom	<input checked="" type="checkbox"/>
Singular Label	Traveler
Plural Label	Travelers
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	
Track Field History	
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

At the bottom right of the main area, there are 'Edit' and 'Delete' buttons. The top of the screen shows the browser title 'Traveler | Salesforce' and the URL 'd5j00000bcplieab-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01fj0000032x04/Details/view'. The taskbar at the bottom of the window includes icons for search, file operations, and system status.

## Creation Of Fields for Vehicle Object

The below steps will assist you in creating Fields.

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

**Fields & Relationships**  
16 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
2 WHEELERS	x2_WHEELERS__c	Picklist	Vehicle Type	
4 WHEELERS	X4_WHEELERS__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)		
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 Vehicle 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 4Wheelers.

The below steps will assist you in creating Field Dependencies.

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, Select Vehicles Object
4. Now Select Fields and relationships from setup menu of the vehicle object.
5. Click Field Dependencies.
6. Click New.
7. Select Vehicle Type as the Controlling Field and select 2wheelers as the Dependent Field.
8. Click Continue.
9. Select the appropriate 2 wheelers Brands in each column by double-clicking them.

#### 2 WHEELERS :

- i) HERO
- ii) HONDA
- iii) BAJAJ
- iv) ROYAL ENFIELD v) TVS
- vi) KINETIC
- vii) OLA
- viii) JAWA
- ix) SD
- x) BATTERY

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

Action	Values	API Name	Default	Chart Colors	Modified By
<input type="checkbox"/>	HERO	HERO	<input type="checkbox"/>	Assigned dynamically	saravanthi.y 16/09/2023, 6:58 pm
<input type="checkbox"/>	HONDA	HONDA	<input type="checkbox"/>	Assigned dynamically	saravanthi.y 16/09/2023, 6:58 pm
<input type="checkbox"/>	BAJAJ	BAJAJ	<input type="checkbox"/>	Assigned dynamically	saravanthi.y 16/09/2023, 6:58 pm
<input type="checkbox"/>	ROYAL ENFIELD	ROYAL ENFIELD	<input type="checkbox"/>	Assigned dynamically	saravanthi.y 16/09/2023, 6:58 pm
<input type="checkbox"/>	TVS	TVS	<input type="checkbox"/>	Assigned dynamically	saravanthi.y 16/09/2023, 6:58 pm
<input type="checkbox"/>	KINETIC	KINETIC	<input type="checkbox"/>	Assigned dynamically	saravanthi.y 16/09/2023, 6:58 pm
<input type="checkbox"/>	OLA	OLA	<input type="checkbox"/>	Assigned dynamically	saravanthi.y 16/09/2023, 6:58 pm
<input type="checkbox"/>	JAWA	JAWA	<input type="checkbox"/>	Assigned dynamically	saravanthi.y 16/09/2023, 6:58 pm
<input type="checkbox"/>	SD	SD	<input type="checkbox"/>	Assigned dynamically	saravanthi.y 16/09/2023, 6:58 pm
<input type="checkbox"/>	BATTERY	BATTERY	<input type="checkbox"/>	Assigned dynamically	saravanthi.y 16/09/2023, 6:58 pm

Follow same steps for 4wheelers also

1.Vehicle Type as the Controlling Field and select 4wheelers as the Dependent Field.

2.Click Continue.

3.Select the appropriate 4wheelers Brands in each column by double-clicking them.

4.4WHEELERS :

- i)RENAULT
- ii)SKODA
- iii)HONDA
- iv)HYUNDAI
- v)SUZUKI
- vi)MAHINDRA
- vii) VOLKSWAGEN
- viii) BENZ
- ix)AUDI
- x)VOLVO

5.Click Include Values.

6.Click Preview, then test the dependency by selecting different Vehicle Type and viewing the different Vehicles available for Vehicle Type.

7.Click Close to close the preview window.

8.Click Save.

**Vehicle**

Action	Values	API Name	Default	Chart Colors	Modified By	Modified
<input type="checkbox"/>   Edit   Del   Deactivate	RENAULT	RENAULT	<input type="checkbox"/>	Assigned dynamically	saravanthiy...	16/09/2023, 7:02 pm
<input type="checkbox"/>   Edit   Del   Deactivate	SKODA	SKODA	<input type="checkbox"/>	Assigned dynamically	saravanthiy...	16/09/2023, 7:02 pm
<input type="checkbox"/>   Edit   Del   Deactivate	HONDA	HONDA	<input type="checkbox"/>	Assigned dynamically	saravanthiy...	16/09/2023, 7:02 pm
<input type="checkbox"/>   Edit   Del   Deactivate	HYUNDAI	HYUNDAI	<input type="checkbox"/>	Assigned dynamically	saravanthiy...	16/09/2023, 7:02 pm
<input type="checkbox"/>   Edit   Del   Deactivate	SUZUKI	SUZUKI	<input type="checkbox"/>	Assigned dynamically	saravanthiy...	16/09/2023, 7:02 pm
<input type="checkbox"/>   Edit   Del   Deactivate	MAHINDRA	MAHINDRA	<input type="checkbox"/>	Assigned dynamically	saravanthiy...	16/09/2023, 7:02 pm
<input type="checkbox"/>   Edit   Del   Deactivate	VOLVO	VOLVO	<input type="checkbox"/>	Assigned dynamically	saravanthiy...	16/09/2023, 7:02 pm
<input type="checkbox"/>   Edit   Del   Deactivate	AUDI	AUDI	<input type="checkbox"/>	Assigned dynamically	saravanthiy...	16/09/2023, 7:02 pm
<input type="checkbox"/>   Edit   Del   Deactivate	Volkswagen	Volkswagen	<input type="checkbox"/>	Assigned dynamically	saravanthiy...	16/09/2023, 7:02 pm
<input type="checkbox"/>   Edit   Del   Deactivate	BENZ	BENZ	<input type="checkbox"/>	Assigned dynamically	saravanthiy...	16/09/2023, 7:52 pm

**Inactive Values**

No Inactive Values values defined.

## 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)

Create a Lookup fields

- 1.Click fields & relationships and click new
- 2.Select Lookup relationship & click next
- 3.Choose the related object as Vehicle & click next
- 4.Give the field label & click next, next, next and Save.

The screenshot shows the Salesforce Object Manager interface for the 'Driver' object. The left sidebar has a 'Fields & Relationships' section selected. The main area displays a table titled 'Fields & Relationships' with 10 items. The columns show the field name, API name, and data type. Fields listed include Driver Name, Fair Per Hour, Last Modified By, License No, Mobile No, Owner, and Vehicle.

Field	API Name	Type
Driver Name	Driver_Name_c	Text(10)
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)

## Fields In Traveler Objects Follow Below Data 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)

Inbox (1,043) - sravanthiyeddu | Untitled document - Google Docs | Student Dashboard | Opportunity | Salesforce

Setup Home Object Manager

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 34 Items, Sorted by Field Label

Journey End Date	Journey_End_Date__c	Date/Time
Journey Start Date	Journey_Start_Date__c	Date/Time
Last Modified By	LastModifiedById	Lookup(User)
Lead Source	LeadSource	Picklist
Main Competitor(s)	MainCompetitors__c	Text(100)
Next Step	NextStep	Text(255)
Opportunity Currency	CurrencyIsoCode	Picklist
Opportunity Name	Name	Text(120)
Opportunity Owner	OwnerId	Lookup(User)

Quick Find New Deleted Fields Field Dependencies Set History Tracking

32°C Cloudy 16:10 21-09-2023

This screenshot shows the Salesforce Object Manager interface for the Opportunity object. The left sidebar contains navigation links for Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Fields & Relationships' and lists 34 items, sorted by Field Label. Each item has a label, field name, and data type. A toolbar at the top of the list provides search, quick find, new, deleted fields, field dependencies, and history tracking options. The bottom status bar shows the date and time.

Inbox (1,043) - sravanthiyeddu | Untitled document - Google Docs | Student Dashboard | Opportunity | Salesforce

Setup Home Object Manager

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 34 Items, Sorted by Field Label

Probability (%)	Probability	Percent(3, 0)
Quantity	TotalOpportunityQuantity	Number(16, 2)
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)

Quick Find New Deleted Fields Field Dependencies Set History Tracking

32°C Cloudy 16:11 21-09-2023

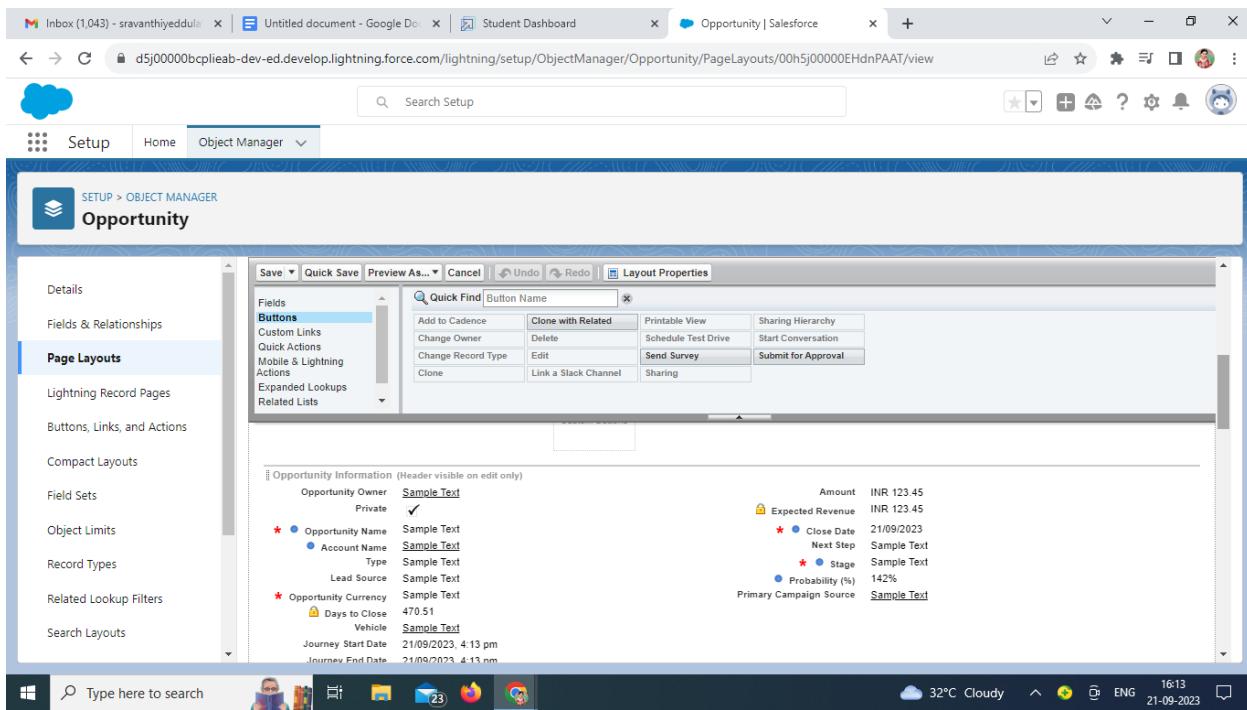
This screenshot shows the Salesforce Object Manager interface for the Opportunity object. The left sidebar contains navigation links for Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Fields & Relationships' and lists 34 items, sorted by Field Label. Each item has a label, field name, and data type. A toolbar at the top of the list provides search, quick find, new, deleted fields, field dependencies, and history tracking options. The bottom status bar shows the date and time.

# Page Layout Setup

## Organize Opportunity Layout

### Organize Opportunity layout

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. Search in quick find (Opportunity) & select Opportunity.
4. Click on page layout and you can add or remove fields by drag & drop



## Create The Vehicle Management App

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

5. From Available Items, select Accounts, Contacts, Opportunities, Vehicle, Driver, Travelers, Reports, and Dashboards and move them to Selected Items. Click Next.
6. From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.
7. 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.

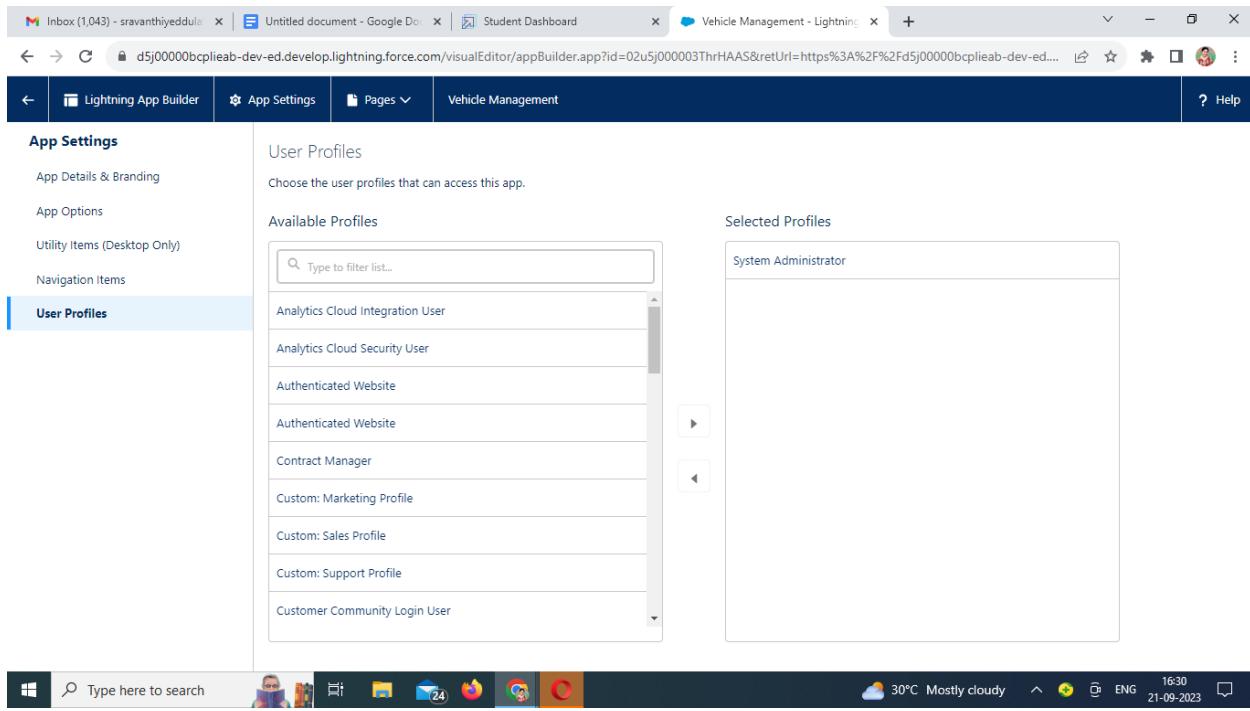
The screenshot shows the Salesforce App Manager interface. At the top, there's a navigation bar with tabs like Setup, Home, Object Manager, and a search bar labeled "Search Setup". Below the navigation bar is a sidebar with categories like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION (with sub-options for Users, Data, Email), and PLATFORM TOOLS. The main content area is titled "Lightning Experience App Manager" and displays a table of 27 installed apps. The columns in the table are App Name, Developer Name, Description, Last Modified, Type, and Status (indicated by a checkmark). The table includes rows for various standard and custom apps like Chatter, Salesforce Scheduler, Service, and Vehicle Management. A watermark for "BDO Startup Booster" is visible at the bottom right of the table area.

App Name	Developer Name	Description	Last Modified	Type	Status
17 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and f...	15/07/2023, 4:26 pm	Classic	✓
18 Salesforce Scheduler S...	LightningScheduler	Set up personalized appointment scheduling.	15/07/2023, 4:28 pm	Lightning	✓
19 Sanjay Gupta Tech sch...	Sanjay_Gupta_Tech_sch...	Learning platform	27/08/2023, 4:43 pm	Classic	
20 Service	Service	Manage customer service with accounts, contacts, cases, and ...	15/07/2023, 4:26 pm	Classic	✓
21 Service Console	LightningService	(Lightning Experience) Lets support agents work with multiplo...	15/07/2023, 4:26 pm	Lightning	✓
22 Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-dr...	15/07/2023, 4:26 pm	Classic	
23 Space Craft App	Space_Craft_App	A new Space Craft App	09/08/2023, 4:57 pm	Lightning	✓
24 sravanthi	sravanthi		27/07/2023, 4:20 pm	Community	
25 Subscription Manage...	RevenueCloudConsole	Get started automating your revenue processes	15/07/2023, 4:26 pm	Classic	
26 Travel App	Travel_App		08/08/2023, 4:57 pm	Lightning	✓
27 Vehicle Management	Vehicle_Management		16/09/2023, 4:26 pm	Lightning	✓

The screenshot shows the 'Vehicle Management - Lightning' app in the App Builder. The left sidebar has 'App Settings' selected. The main area is titled 'App Details & Branding'. It contains fields for 'App Name' (Vehicle Management), 'Developer Name' (Vehicle\_Management), and 'Image' (a placeholder box with an 'Upload' button). A 'Primary Color Hex Value' is set to #0070D2. Below these are 'Org Theme Options' and 'App Launcher Preview' which shows a card with 'VM' and 'Vehicle Management'. The taskbar at the bottom includes a search bar and various icons.

The screenshot shows the 'Vehicle Management - Lightning' app in the App Builder. The left sidebar has 'App Settings' selected. The main area is titled 'Navigation Items'. It shows a list of 'Available Items' on the left and 'Selected Items' on the right. Available items include Account Brands, Alert Settings, All Sites, Alternative Payment Methods, Analytics, App Launcher, Appointment Invitations, and Approval Requests. Selected items include Vehicles, Drivers, Travelers, Reports, Dashboards, Recruiters, Jobs, Candidates, and Job Applications. The taskbar at the bottom includes a search bar and various icons.

Add vehicles, drivers and travelers in the navigation bar.



Under user profiles select system administrator.

## Creating A Profile

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

### Creating a Profile:

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

- 1.From Setup enter Profiles in the Quick Find box, and select Profiles.
- 2.From the list of profiles, find Standard User.
- 3.Click Clone.
- 4.For Profile Name, enter Vehicle Manager.
- 5.Click Save.
- 6.While still on the Vehicle Manager Profile page, then click Edit.
- 7.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.

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

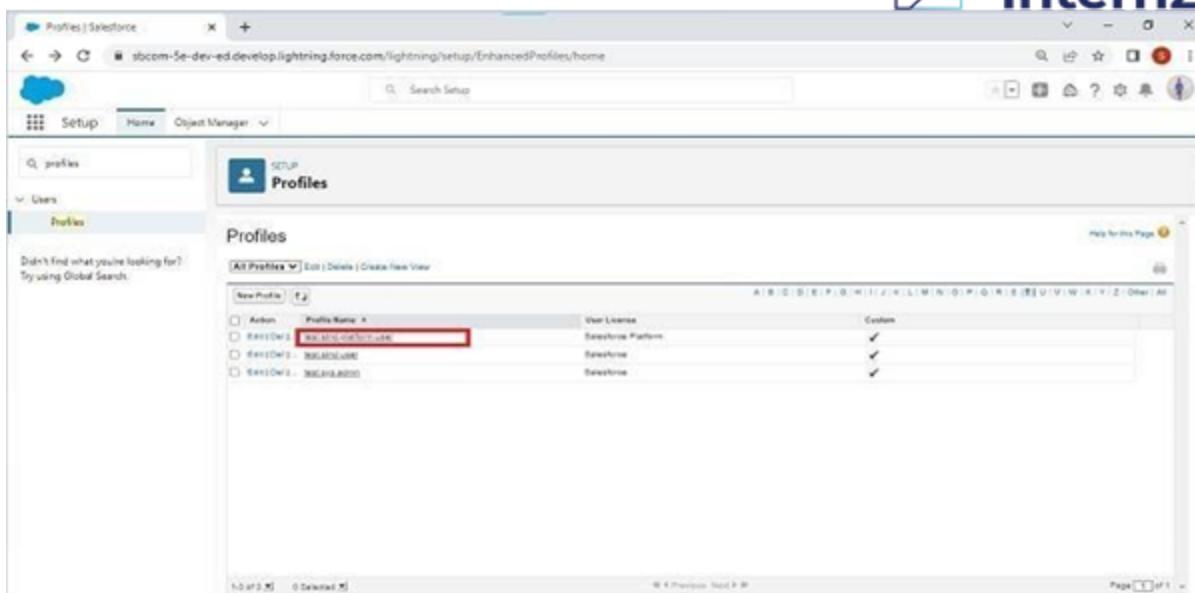
The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The left sidebar has 'profiles' and 'Profiles' highlighted. The main area displays a table of profiles with columns for Action, Profile Name, User License, and Custom. A red box highlights the 'Clone' action for the 'Standard User' profile. The table data is as follows:

Action	Profile Name	User License	Custom
Clone	20xx	Salesforce	✓
Clone	Global Partner User	Silver Partner	
Clone	Global Manager	Salesforce	
Clone	Standard Platform User	Salesforce Platform	
Clone	Standard User	Salesforce	
Clone	System Administrator	Salesforce	

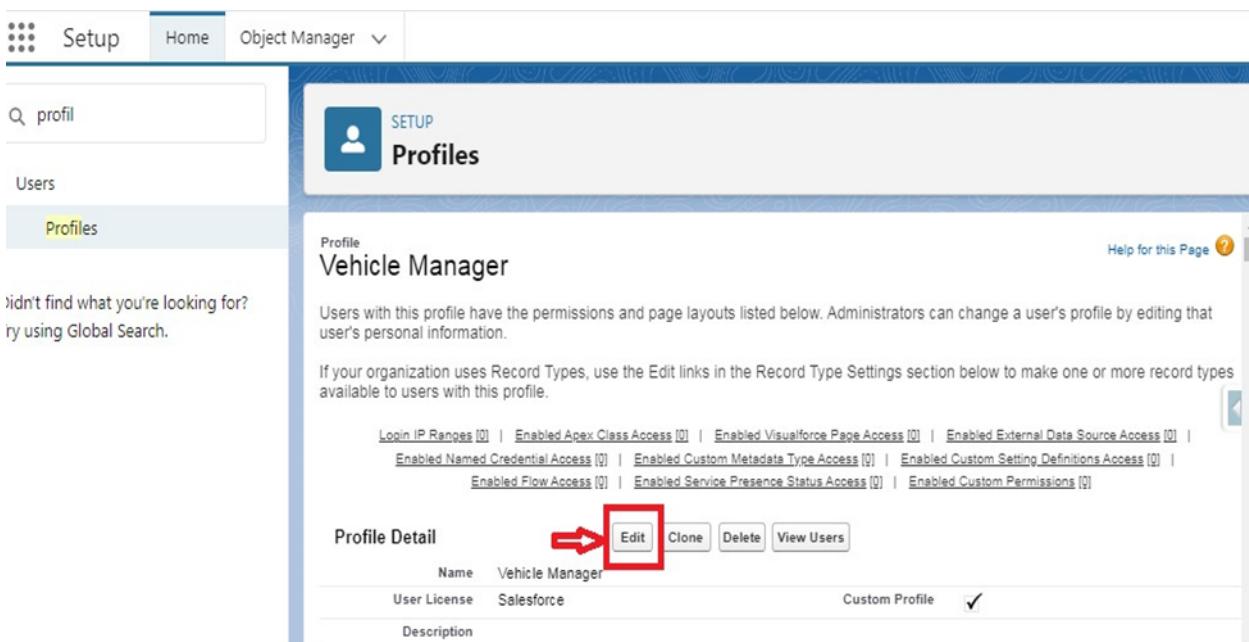
Enter a Profile Name

The screenshot shows the 'Clone Profile' dialog box. It prompts the user to 'Enter the name of the new profile.' Below this, it says 'You must select an existing profile to clone from.' A red box highlights the 'Profile Name' input field, which contains 'Standard User'. Two red arrows point to the 'Save' button at the bottom right of the dialog.

Click on the new created profile



The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The list view displays several profiles, with 'Vehicle Manager' highlighted by a red box. The profile details show it has a User License of 'Salesforce' and is a 'Custom' profile.



The screenshot shows the 'Vehicle Manager' profile detail page. At the top, there is a list of permissions: Login IP Ranges, Enabled Apex Class Access, Enabled Visualforce Page Access, Enabled External Data Source Access, Enabled Named Credential Access, Enabled Custom Metadata Type Access, Enabled Custom Setting Definitions Access, Enabled Flow Access, Enabled Service Presence Status Access, and Enabled Custom Permissions. Below this, the 'Profile Detail' section shows the profile's name, user license, and custom status. The 'Edit' button is highlighted with a red arrow.

Name	Vehicle Manager
User License	Salesforce
Description	

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

# 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.

The screenshot shows the Salesforce Setup Roles page. On the left, there's a sidebar with navigation links like 'Setup', 'Home', and 'Object Manager'. The main content area has a title 'SETUP Roles' with a 'Help for this Page' link. Below it is a section titled 'Understanding Roles' with a sub-section 'Sample Role Hierarchy'. A 'Territory-based Sample' is selected. The hierarchy diagram shows 'Executive Staff' at the top, with 'CEO - President' and 'CFO - VP, Sales' as children. 'CEO - President' has three children: 'Western Sales Director', 'Eastern Sales Director', and 'International Sales Director'. Each of these three directors has three children: 'Western Sales Rep', 'Eastern Sales Rep', and 'International Sales Rep'. To the right of the diagram, there are detailed descriptions of permissions for each role level. At the bottom right of the page, there are 'Set Up Roles' and 'Don't show this page again' buttons.

Click Add role under CEO

https://vanshvivtechnologypvtelm-dev-ed.develop.lightning.force.com/lightning/setup/Roles/home

Setup Home Object Manager

role

Users Roles

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.

Your Organization's Role Hierarchy

CEO (Edit | Get | Delete)

Add Role

Help for this Page

Show in tree View

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

```
graph TD; Root[CEO] --> Edit[Edit]; Root --> Get[Get]; Root --> Delete[Delete]; Root --> Add1[Add Role]; Add1 --> Add2[Add Role]
```



Enter Label name

The screenshot shows the Salesforce Setup interface for creating a new role. The left sidebar is collapsed, and the main area is titled "Role Edit" with "New Role". The "Label" field contains "Vehicle Manager", the "Role Name" field contains "Vehicle\_Manager", and the "This role reports to" dropdown is set to "CEO". There is also a "Role Name as displayed on reports" field which is empty. At the bottom are "Save", "Save & New", and "Cancel" buttons.

Click Add roll under Vehicle Manager

The screenshot shows the "Creating the Role Hierarchy" page. The sidebar is collapsed, and the main area displays the "Your Organization's Role Hierarchy". A tree view shows the following structure: **CEO** (Edit | Del | Assign) has children **CFO**, **COO**, **SVP, Customer Service & Support**, **SVP, Human Resources**, **SVP, Sales & Marketing**, and **Vehicle Manager**. Each node has an "Add Role" link next to it. A "Collapse All (Expand All)" button is at the top of the hierarchy tree. A "Show in tree view" button is located in the top right corner.

Enter Roll Label name

## Users

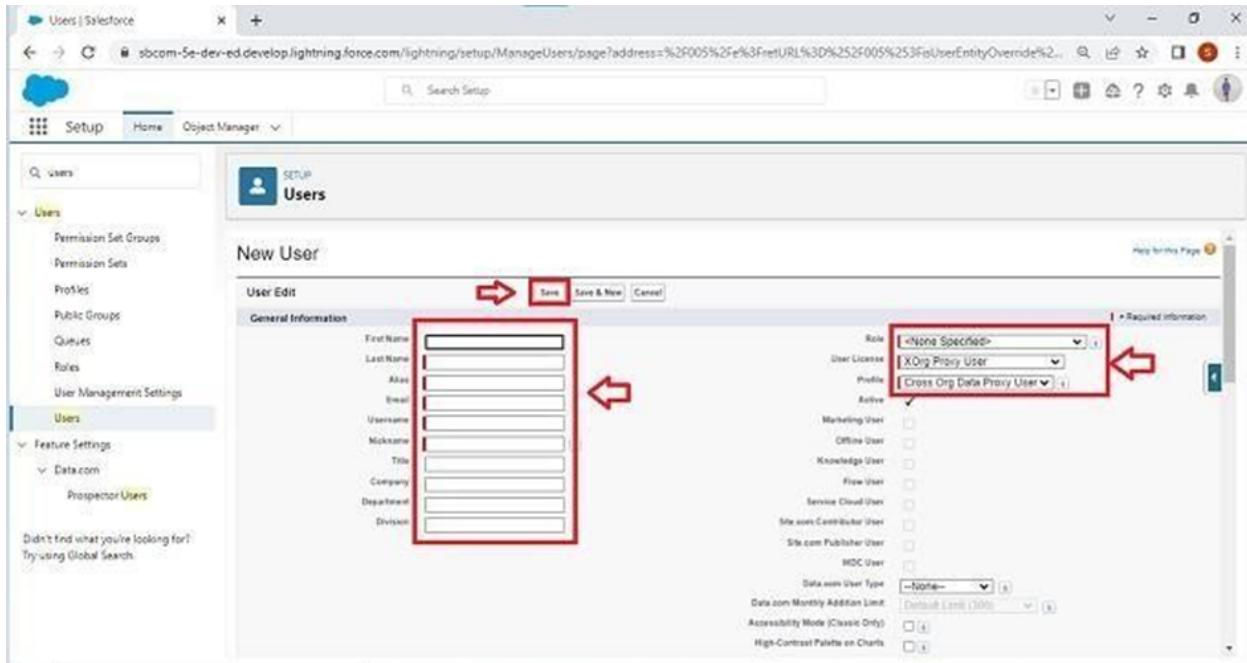
A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account.

## Creating A User

- 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 License As salesforce.
- 6.Select a profile as Vehicle Manager.

The screenshot shows the Salesforce Setup interface with the 'Users' page selected. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar has sections like 'Permission Set Groups', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings' (which is highlighted with a red box and arrow), and 'Feature Settings'. The main content area is titled 'All Users' and contains a table of users. The 'New User' button at the top right of the table is also highlighted with a red box and arrow. The table columns include Action, Full Name, Alias, Username, Role, Active, and Profile. Several user entries are listed, such as 'John', 'Rexxx', 'Chetan', 'Catherine', 'Hector', 'Robert', 'Rakesh', 'Erik', 'Liam', 'Sarah', 'David', 'Tina', and 'Theresa'. The 'Profile' column shows various profiles like 'Standard User', 'Chatter Manager User', 'Chatter Free User', 'Customer Sales Team', 'Customer Support - North America', 'CEO', 'Western Sales Team', 'Customer Support - International', and 'Marketing Team'.

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



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.

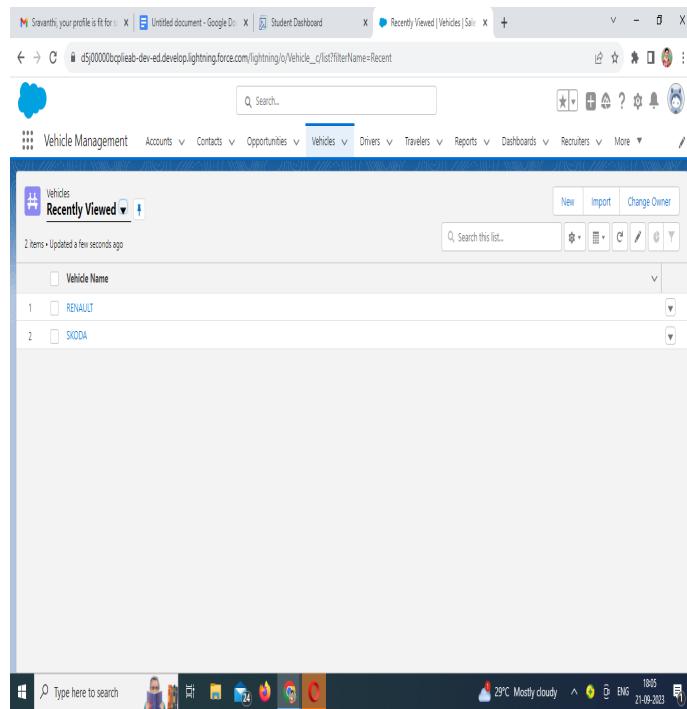
User will receive an email to reset password.

Once user will finish it, would be able to login and use the system.

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

## Create Vehicle Record

- 1.Click on App Launcher on left side of screen.
- 2.Search Vehicle Management System & click on it.
- 3.Click on Vehicle tab.
- 4.Click new button
- 5.Fill all Vehicle record details.
- 6.Click on Save Button



## View Record (Vehicle)

1. Click on App Launcher on left side of screen.
2. Search Vehicle Management System & click on it.
3. Click on Vehicle Tab.
4. Click on any record name. you can see the details of the Vehicle

The screenshot displays two separate instances of a Salesforce Lightning application window, likely from a browser tab, showing vehicle management details.

**Top Window (RENAULT Record):**

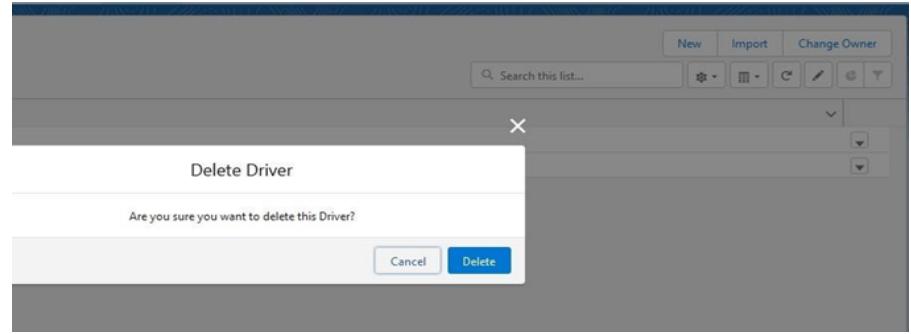
- Vehicle Name:** RENAULT
- Owner:** sravanthi.y
- Currency:** INR - Indian Rupee
- Created By:** sravanthi.y, 21/09/2023, 6:05 pm
- Last Modified By:** sravanthi.y, 21/09/2023, 6:05 pm

**Bottom Window (SKODA Record):**

- Vehicle Name:** SKODA
- Owner:** sravanthi.y
- Currency:** INR - Indian Rupee
- Created By:** sravanthi.y, 21/09/2023, 6:05 pm
- Last Modified By:** sravanthi.y, 21/09/2023, 6:05 pm

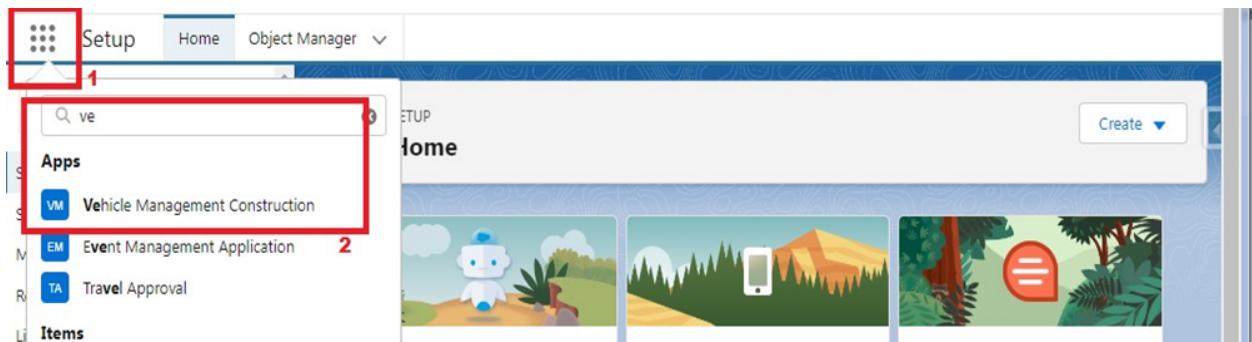
The interface includes a top navigation bar with links for Accounts, Contacts, Opportunities, Vehicles, Drivers, Travelers, Reports, and Dashboards. A "New Contact" button is visible in the top right corner of the main content area. The bottom of the screen shows a Windows taskbar with various pinned icons and a weather widget indicating 29°C Mostly cloudy.

Delete Records(Vehicle)



## Report

- 1.Click on App Launcher on left side of screen.
- 2.Search Vehicle Management System & click on it.
- 3.Click on Reports Tab.
- 4.Click on Opportunity Details report and see records



The screenshot shows the Smart Internz application interface. At the top, there is a navigation bar with various menu items: Vehicle Management, Accounts, Contacts, Opportunities, Drivers, Vehicles, Reports, and More. The 'Reports' item is highlighted with a red box and has a red number '3' above it. Below the navigation bar is a search bar labeled 'Search recent reports...' and buttons for 'New Report' and 'New Folder'. On the left, there is a sidebar with categories: Recent, REPORTS, Created by Me, Private Reports, Public Reports, and All Reports. Under the 'REPORTS' category, there is a list of reports with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. One report, 'Opportunity Details', is highlighted with a red box and has a red number '4' to its right. Other reports listed include 'Occasions with Attendees', 'Events with Attendees', 'Candidate Internal Result Report', and 'Private Reports'.

## Dashboard

- 1.Click on App Launcher on left side of screen.
- 2.Search Vehicle Management System & click on it.
- 3.Click on Dashboard Tab.
- 4.Click on Opportunity and Dashboard and see graph view of records

The screenshot shows the Smart Internz application interface with the App Launcher open. The launcher has several sections: 'Setup' (highlighted with a red box and number 1), a search bar containing 'Vehicle Management', a 'Home' tab, and an 'Object Manager' dropdown. Below these are sections for 'Apps' (highlighted with a red box and number 2) and 'Items'. In the 'Apps' section, 'Vehicle Management Construction' is selected and highlighted with a red box. Other apps listed include 'Event Management Application' and 'Travel Approval'. To the right of the launcher is the main dashboard area, which features a 'Create' button and three decorative cards: one with a white robot, one with a tent, and one with a tree.

Sravanthi, your profile is fit for s | Untitled document - Google Doc | Student Dashboard | Dashboards | Salesforce

d5j00000bcplieab-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru

Vehicle Management Accounts Contacts Opportunities Vehicles Drivers Travelers Reports Dashboards Recruiters More

Search... Search recent dashboards... New Dashboard New Folder

Dashboards Recent 6 items

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Job application wtih candidate name		Private Dashboards	sravanthi y	21/9/2023, 11:11 am	
Created by Me	Opportunity and Dashboard		Private Dashboards	sravanthi y	17/9/2023, 7:53 pm	
Private Dashboards	Supply Costs Dashboard		Private Dashboards	sravanthi y	9/8/2023, 11:52 am	
All Dashboards	Dashboard		Private Dashboards	sravanthi y	31/7/2023, 8:57 pm	
FOLDERS	Dashboard 1		Private Dashboards	sravanthi y	1/8/2023, 3:25 pm	
All Folders	New Dashboard		Private Dashboards	sravanthi y	1/8/2023, 3:23 pm	

FAVORITES All Favorites

Type here to search

29°C Mostly cloudy 18:14 ENG 21-09-2023