

A CRM Application For Public Transport Management

Introduction: -

The Public Transport (RTC - Regional Transport corporation) Management System is a comprehensive Salesforce application designed to streamline and manage various operational aspects of the Public Transport. This system will enable the Transport department to efficiently maintain details of employees, their roles, bus stations, buses, ticket fares, daily bus trips, passenger counts, and the total ticket fare amount. By leveraging Salesforce's robust platform, the Transport Department can improve operational efficiency, data accuracy, and reporting capabilities.

Project Overview:

This project is to Consolidate all Transport-related data into a single Salesforce application to ensure easy access, management, and reporting. Enable real-time insights and reports on various operational metrics such as passenger count and revenue. Maintain detailed records of all Transport employees, including personal details, contact information. Define and assign roles and responsibilities to each employee. Schedule and manage employee shifts, especially for drivers and conductors. Maintain information on all bus stations, including location, facilities. Maintain detailed records of all buses, including model, capacity. Manage bus schedules and assign buses to specific routes and trips. Define and manage ticket fares for different routes and bus types. Track daily trips for each bus, including start and end times, routes, and driver details. Record the number of passengers on each trip. Calculate and track the total ticket fare amount collected from each trip. Provide real-time dashboards for quick insights into key metrics such as passenger count, trip efficiency, and revenue.

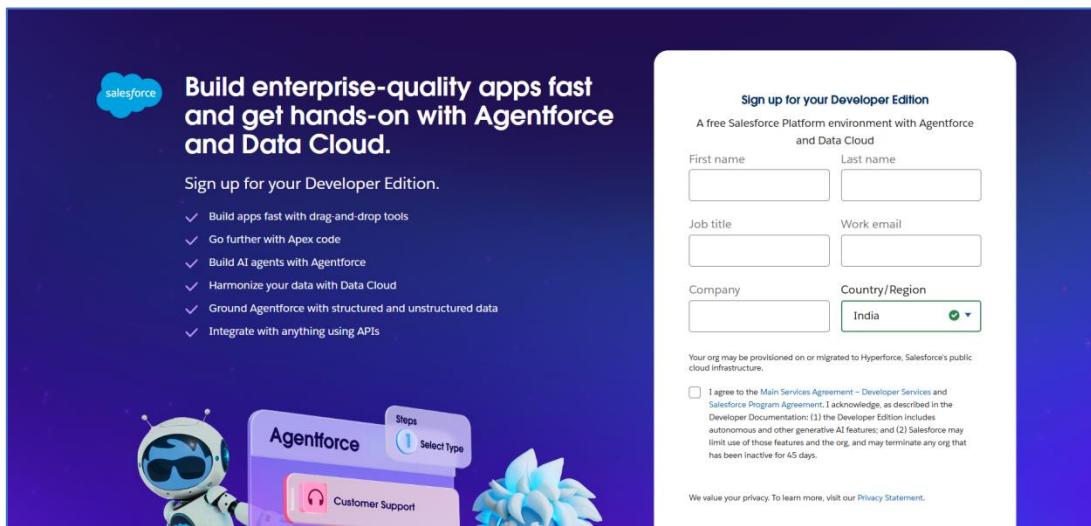
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Milestone 1 Salesforce

Activity 1: Creating Developer Account

Creating a developer org in Salesforce

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :

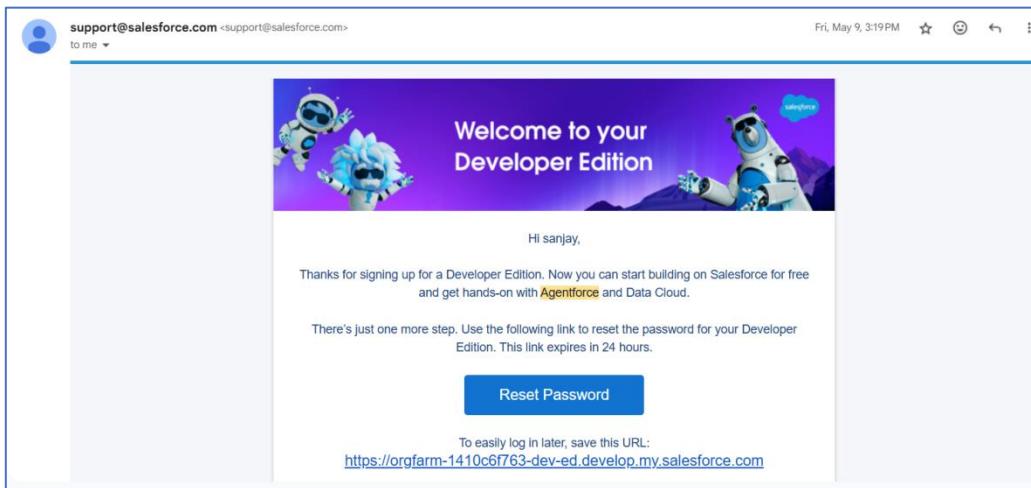


1. First name – Rajitha
2. Last name - S
3. Email – rajithareddy91455@gmail.com
4. Role : Developer
5. Company : Gayatri Degree College Tirupati
6. County : India

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Activity 2: Account Activation

1. 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.

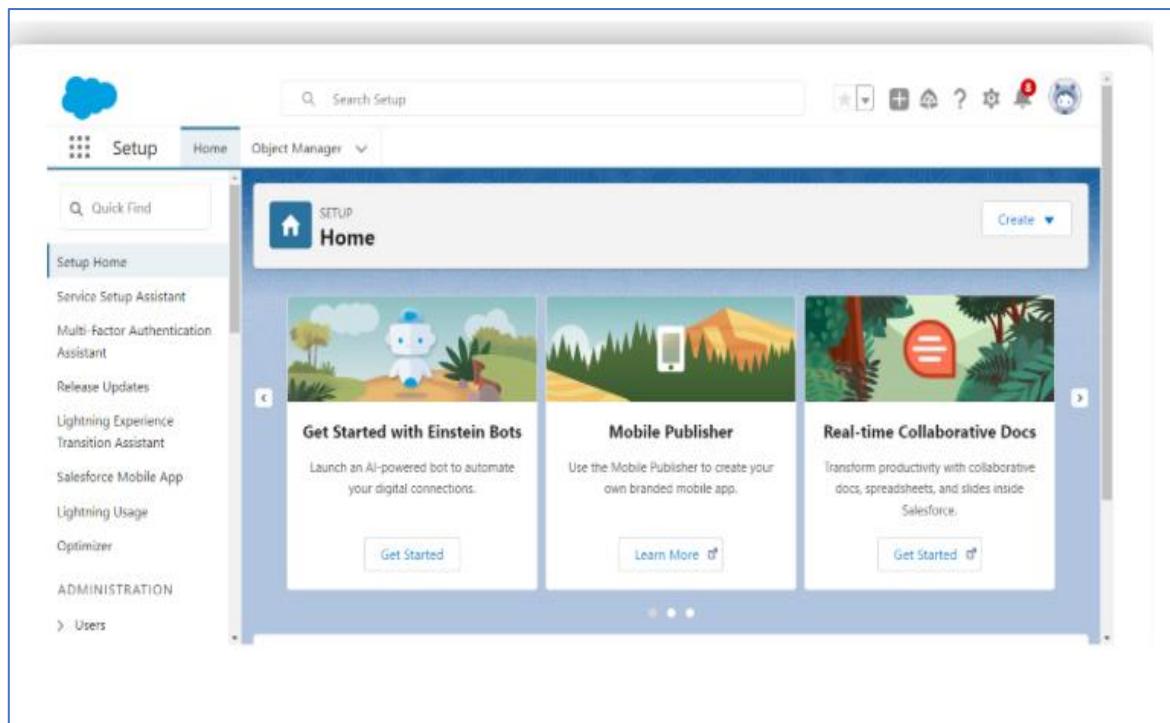


2. Click on Verify Account
3. Give a password and answer a security question and click on change password.

A screenshot of a "Change Your Password" page. It asks for a new password and a confirmation, both highlighted with a red box. Below that is a "Security Question" section with a dropdown menu showing "In what city were you born?" and an "Answer" field containing "asdfghjkl". A blue "Change Password" button at the bottom is also highlighted with a red box.

4. Then you will redirect to your Salesforce setup page.

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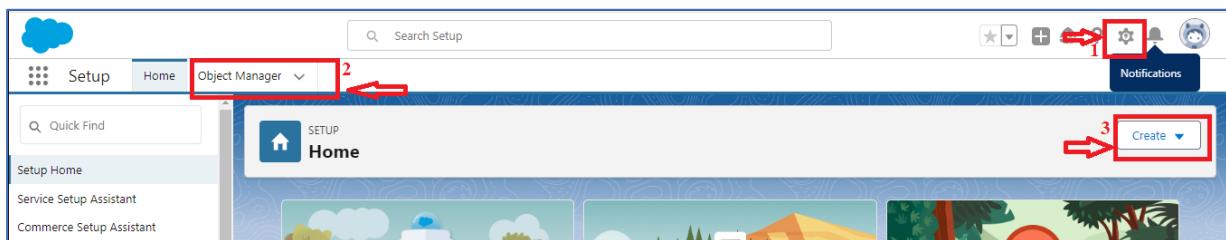
Milestone 2 Objects

Activity 1: Creating a Bus Station Object

The purpose of creating a Bus Station custom object is to store and manage information about Bus Stops.

To create an object:

1. From the setup page
2. Click on Object Manager
3. Click on Create >> Click on Custom Object.



4. Enter the label name as Bus Station
5. Enter Plural label name as Bus Stations
6. Enter Record Name as Bus Station Name

This screenshot shows the 'Custom Object Definition Edit' screen under the 'SETUP' tab. The title is 'New Custom Object'. The form has several sections:

- Custom Object Information:** It says 'The singular and plural labels are used in tabs, page layouts, and reports.' There are two input fields: 'Label' (containing 'Bus Station') and 'Plural Label' (containing 'Bus stations'). Both fields have 'Example: Account' next to them. A red box labeled '4' is over the 'Label' field, and another red box labeled '5' is over the 'Plural Label' field.
- Object Name:** It says 'The Object Name is used when referencing the object via the API.' An input field contains 'Bus_Station' with 'Example: Account' next to it.
- Description:** There is a large text input field.
- Context-Sensitive Help Setting:** Radio buttons for 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page'.
- Content Name:** A dropdown menu showing 'None-'.

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7. Select Data Type as Text.
8. Select Allow reports.

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name".

Record Name: Bus Station Name

Data Type: Text

Optional Features:

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Enable Licensing

Object Classification:

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

Deployment Status:

In Development

Deployed

Activate Windows [What is this?](#)
Go to Settings to activate Windows.

9. Select Allow search.
10. Click on Save and New

Deployment Status:

In Development

Deployed

Search Status:

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

Allow Search

Object Creation Options (Available only when custom object is first created):

Add Notes and Attachments related list to default page layout

Launch New Custom Tab Wizard after saving this custom object

Save **Save & New** Cancel

Activate Windows [What is this?](#)
Go to Settings to activate Windows.

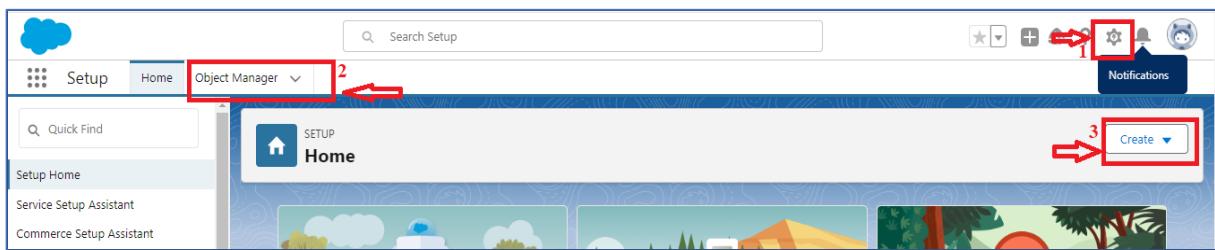
In the same way Create Bus, Trip, Ticket Fare and Employee objects.

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Activity 2: Creating a Bus Object

The purpose of creating a Bus custom object is to store and manage information about Bus Stops.
To create an object:

1. From the setup page
2. Click on Object Manager
3. Click on Create >> Click on Custom Object.



4. Enter the label name as Bus
5. Enter Plural label name as Buses
6. Enter Record Name as Bus Registration Number

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label	<input type="text" value="Bus"/>	Example: Account
Plural Label	<input type="text" value="Buses"/>	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	
The Object Name is used when referencing the object via the API.		
Object Name	<input type="text" value="Bus"/>	Example: Account
Description	<input type="text"/>	
Context-Sensitive Help Setting	<input checked="" type="radio"/> Open the standard Salesforce.com Help & Training window <input type="radio"/> Open a window using a Visualforce page	
Content Name	<input type="text" value="None"/>	

7. Select Data Type as Text.
8. Select Allow reports.

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The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name is called "Name" when referenced via the API.

Record Name Example: Account Name

Data Type Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Optional Features

Allow Reports
 Allow Activities
 Track Field History
 Allow in Chatter Groups
 Enable Licensing i

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

Allow Sharing
 Allow Bulk API Access
 Allow Streaming API Access

Deployment Status

In Development
 Deployed

Search Status

9. Select Allow search.
10. Click on Save and New

Deployment Status

In Development
 Deployed

Search Status

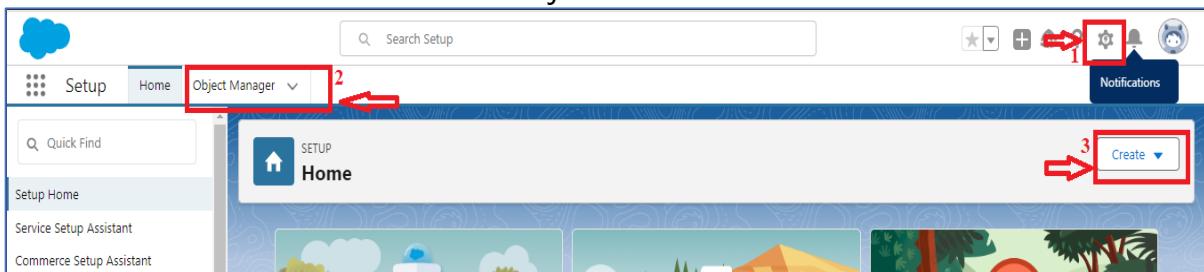
When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

Allow Search

Activity 3: Creating a Trip Object

The purpose of creating a Trip custom object is to store and manage information about Bus Stops. To create an object:

1. From the setup page
2. Click on Object Manager
3. Click on Create >> Click on Custom Object.



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4. Enter the label name as Trip
5. Enter Plural label name as Trips
6. Enter Record Name as Trip No

Custom Object Definition Edit Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label	<input type="text" value="Trip"/>	Example: Account
Plural Label	<input type="text" value="Trips"/>	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	

The Object Name is used when referencing the object via the API.

Object Name	<input type="text" value="Trip"/>	Example: Account
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Description

Context-Sensitive Help Setting

<input checked="" type="radio"/> Open the standard Salesforce.com Help & Training window
<input type="radio"/> Open a window using a Visualforce page

Content Name

—None—

7. Select Data Type as Text.
8. Select Allow reports.

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name	<input type="text" value="Trip No"/>	Example: Account Name
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Data Type **Warning:** If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Optional Features

Allow Reports
 Allow Activities
 Track Field History
 Allow in Chatter Groups
 Enable Licensing 

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

Allow Sharing
 Allow Bulk API Access
 Allow Streaming API Access

9. Select Allow search.
10. Click on Save and New

Deployment Status

In Development
 Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

Allow Search

Save Save & New Cancel

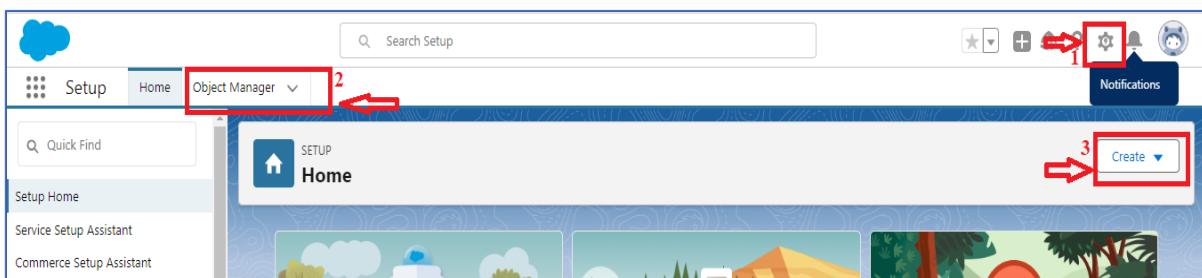
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Activity 4: Creating a Ticket Fare Object

The purpose of creating a Ticket Fare custom object is to store and manage information about Bus Stops.

To create an object:

1. From the setup page
2. Click on Object Manager
3. Click on Create >> Click on Custom Object.



4. Enter the label name as Ticket Fare
5. Enter Plural label name as Ticket Fares
6. Enter Record Name as Route Name

This screenshot shows the 'Custom Object Definition Edit' page. At the top, there are three buttons: 'Save', 'Save & New', and 'Cancel'. The main section is titled 'Custom Object Information' with a note: 'The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.' It includes fields for 'Label' (Ticket Fare), 'Plural Label' (Ticket Fares), and a checkbox for 'Starts with vowel sound'. Below this, there's a note: 'The Object Name is used when referencing the object via the API.' It shows 'Object Name' (Ticket_Fare) and 'Example: Account'. There's also a 'Description' text area and a 'Context-Sensitive Help Setting' section with two radio buttons: 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page'. The 'Content Name' dropdown is set to 'None'.

7. Select Data Type as Text.
8. Select Allow reports.

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Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name Example: Account Name

Data Type **Warning:** If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Optional Features

Allow Reports
 Allow Activities
 Track Field History
 Allow in Chatter Groups
 Enable Licensing [i](#)

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

Allow Sharing
 Allow Bulk API Access
 Allow Streaming API Access

9. Select Allow search.
10. Click on Save and New

Deployment Status

In Development
 Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

Allow Search

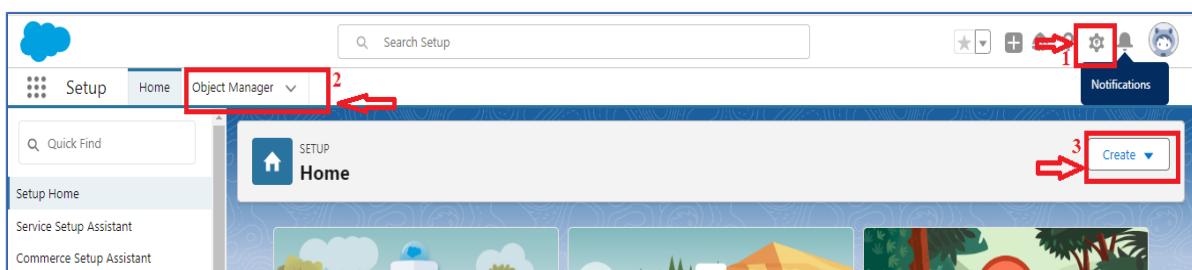
Buttons

Activity 5: Creating a Employee Object

The purpose of creating a Employee custom object is to store and manage information about Bus Stops.

To create an object:

1. From the setup page
2. Click on Object Manager
3. Click on Create >> Click on Custom Object.



4. Enter the label name as Employee
5. Enter Plural label name as Employees
6. Enter Record Name as Employee Id

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Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label	<input type="text" value="Employee"/>	Example: Account
Plural Label	<input type="text" value="Employees"/>	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	

The Object Name is used when referencing the object via the API.

Object Name	<input type="text" value="Employee"/>	Example: Account
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Description

Context-Sensitive Help Setting

<input checked="" type="radio"/> Open the standard Salesforce.com Help & Training window
<input type="radio"/> Open a window using a Visualforce page

Content Name

<input type="button" value="None"/>

7. Select Data Type as Text.
8. Select Allow reports.

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name is called "Name" when referenced via the API.

Record Name	<input type="text" value="Employee Id"/>	Example: Account Name
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Data Type **Warning:** If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Optional Features

<input checked="" type="checkbox"/> Allow Reports
<input type="checkbox"/> Allow Activities
<input type="checkbox"/> Track Field History
<input type="checkbox"/> Allow in Chatter Groups
<input type="checkbox"/> Enable Licensing [i]

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

<input checked="" type="checkbox"/> Allow Sharing
<input checked="" type="checkbox"/> Allow Bulk API Access
<input checked="" type="checkbox"/> Allow Streaming API Access

9. Select Allow search.
10. Click on Save and New

Deployment Status

In Development
 Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

Allow Search

Save **Save & New** **Cancel**

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Milestone 3 Tabs

Activity 1: Creating a tab for Bus Station Object

1. Go to the setup page >> type Tabs in Quick Find bar
2. Click on tabs
3. Click on New (under custom object tab).

The screenshot shows the Salesforce Setup interface under the 'Tabs' section. On the left, there's a sidebar with a search bar (1) and a 'Custom Tabs' section containing 'Custom Object Tabs', 'Web Tabs', and 'Visualforce Tabs'. Under 'Custom Object Tabs', there's a 'New' button (3). The main area displays a message: 'You can create new custom tabs to extend Salesforce functionality or to build new application functionality.' Below this are sections for 'Custom Object Tabs', 'Web Tabs', and 'Visualforce Tabs', each with a 'New' button and a 'What Is This?' link. A red box labeled '2' highlights the 'Custom Tabs' section in the sidebar.

4. Select Object(Bus Station) >> Select the tab style
5. Click on Next >>(Add to profiles page) keep it as default >>Click on Next (Add to Custom App) uncheck the include tab .

The screenshot shows the 'Step 1. Enter the Details' page for creating a custom tab. It's titled 'Step 1 of 3'. The form includes fields for 'Object' (set to 'Bus Station') (4), 'Tab Style' (set to 'Desk'), and 'Description'. Below the form, there's a note about choosing a splash page custom link and a 'Next' button at the bottom right. A red box labeled '4' highlights the 'Object' dropdown.

6. Make sure that the Append tab to user's existing personal customizations is checked

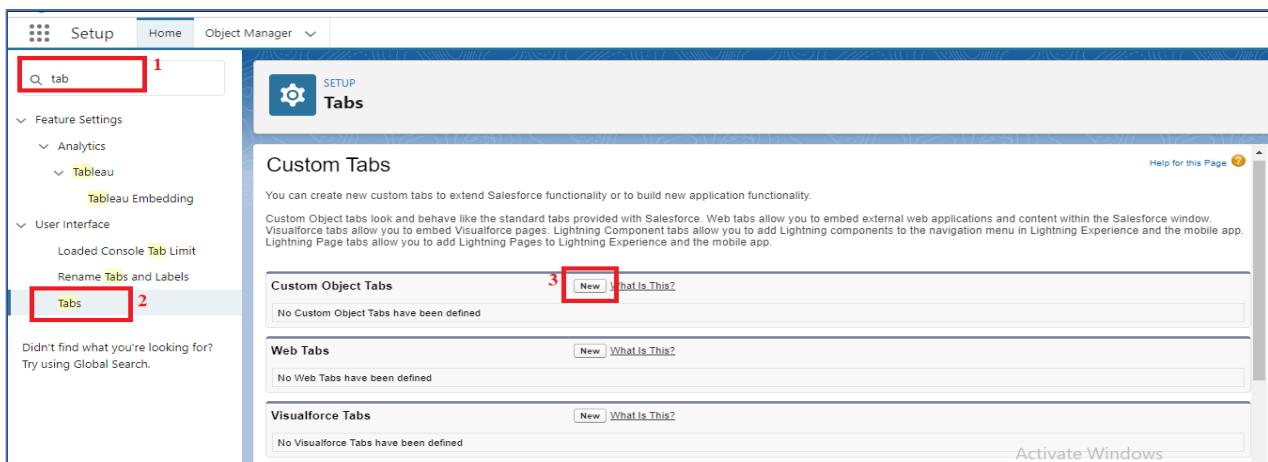
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7. Click on Save.

- 1. Now create the Tabs for the remaining Objects, they are “Bus, Trip, Ticket Fare, Employee”.**
- 2. Follow the same steps as mentioned in Activity -1**

Activity 2: Creating Tabs for Bus Object

1. Go to the setup page >> type Tabs in Quick Find bar
2. Click on tabs
3. Click on New (under custom object tab).



4. Select Object (Bus) >> Select the tab style
5. Click on Next >> (Add to profiles page) keep it as default >>Click on Next (Add to Custom App) uncheck the include tab .

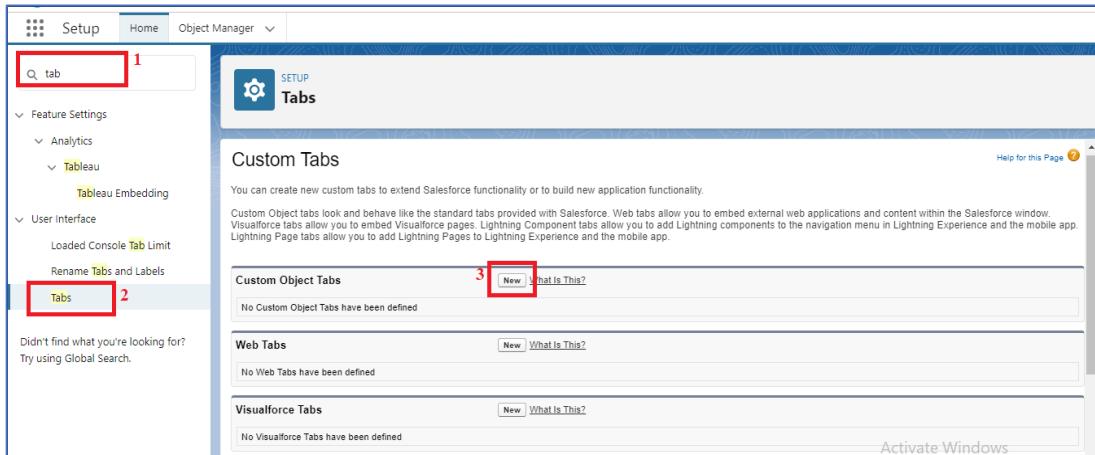
Tab Label	Buses
Object	Bus
Tab Style	<input checked="" type="radio"/> Books <input type="radio"/> Salesforce <input type="radio"/> Lightning

6. Make sure that the Append tab to user's existing personal customizations is checked
7. Click on Save.

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Activity 3: Creating Tabs for Trip Object

1. Go to the setup page >> type Tabs in Quick Find bar
2. Click on tabs
3. Click on New (under custom object tab).



4. Select Object(Trip) >> Select the tab style
5. Click on Next >> (Add to profiles page) keep it as default >>Click on Next (Add to Custom App) uncheck the include tab .

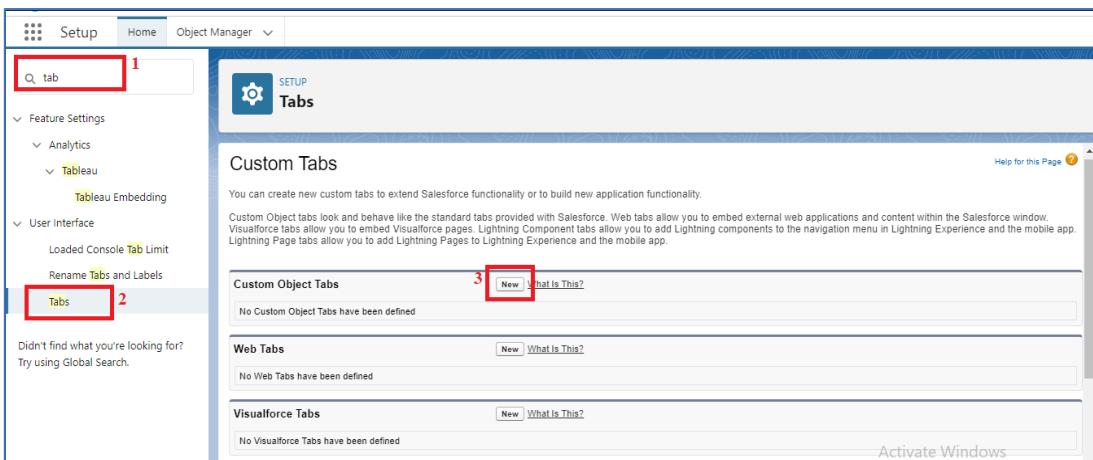
The screenshot shows the 'Edit Custom Object Tab' page for the 'Trips' object. The title is 'Edit Custom Object Tab Trips'. Below it is a note: 'Fill in the fields below to define the custom tab.' The main section is 'Custom Tab Definition Edit' with a sub-section 'Custom Object Tab Information'. It shows 'Tab Label: Trips', 'Object: Trip', and 'Tab Style: Safe'. There is a red box highlighting the 'Append' checkbox under the heading 'Append tab to user's existing personal customizations'. Other options like 'Default' and 'Include' are also present. A note at the bottom right says 'Required Information'.

6. Make sure that the Append tab to user's existing personal customizations is checked
7. Click on Save.

Activity 4: Creating Tabs for Ticket Fare Object

1. Go to the setup page >> type Tabs in Quick Find bar
2. Click on tabs
3. Click on New (under custom object tab).

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4. Select Object (Ticket Fare) >> Select the tab style
5. Click on Next >>(Add to profiles page) keep it as default >>Click on Next (Add to Custom App) uncheck the include tab .

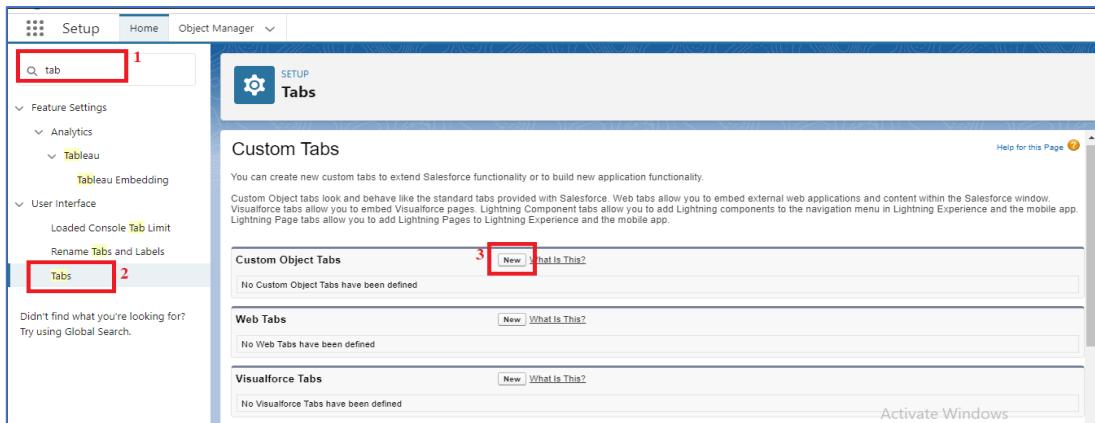


6. Make sure that the Append tab to user's existing personal customizations is checked
7. Click on Save.

Activity 5: Creating Tabs for Employee Object

1. Go to the setup page >> type Tabs in Quick Find bar
2. Click on tabs
3. Click on New (under custom object tab).

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4. Select Object(Ticket Fare) >> Select the tab style
5. Click on Next >>(Add to profiles page) keep it as default >>Click on Next (Add to Custom App) uncheck the include tab .



6. Make sure that the Append tab to user's existing personal customizations is checked
7. Click on Save

Milestone 4

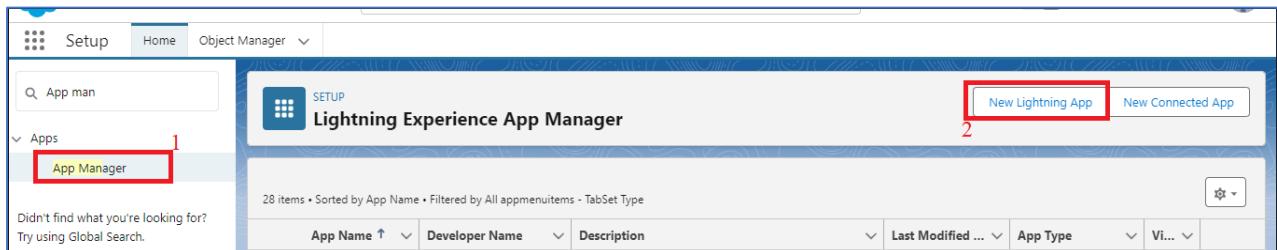
The Lightning App

A Lightning App in Salesforce refers to an application built using the Lightning framework, which is a modern user interface framework for developing dynamic web applications for mobile and desktop devices. Lightning apps provide a more responsive and interactive user experience compared to traditional Visualforce pages.

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Activity 1: Create a Lightning App for Banquet Hall Booking

1. From Setup, enter App Manager in the Quick Find and select App Manager.
2. Click New Lightning App.



3. Enter Public Transport as the App Name, then click next

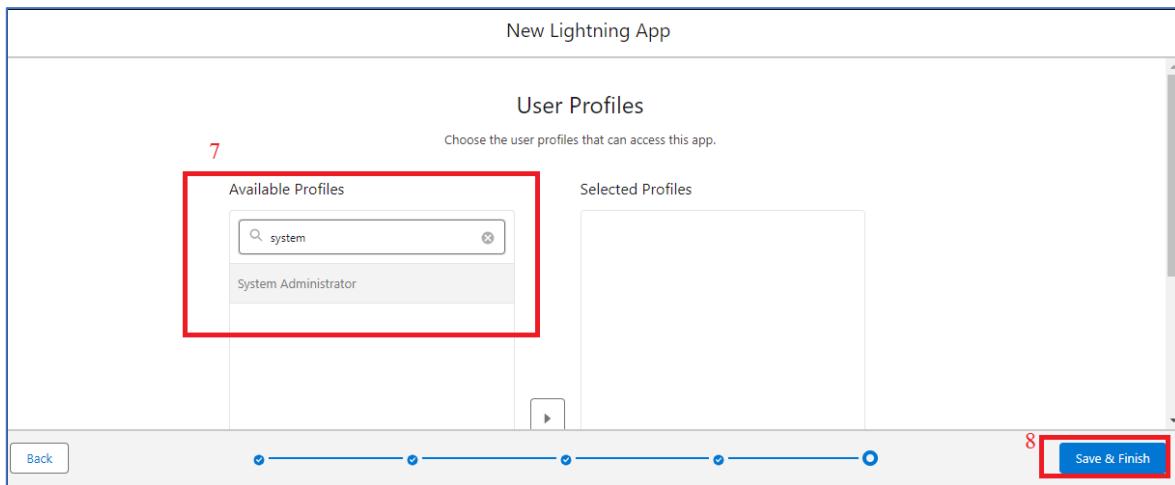
The screenshot shows the 'New Lightning App' configuration page. The 'App Details & Branding' section includes fields for 'App Name' (containing 'Public Transport(RTC)', highlighted by a red box), 'Developer Name' (containing 'Public_TransportRTC'), and 'Description' (with placeholder text 'Enter a description...'). The 'App Branding' section includes an 'Image' upload field and a 'Primary Color Hex' field set to '#0070D2'. A red number '3' is placed above the 'App Name' field. A red number '6' is placed below the 'Next' button.

4. Under App Options, leave the default selections and click next.
5. Under Utility Items, leave as is and click Next.
6. From Available Items, select Bus Stations, Buses, Trips, Ticket Fares, Employees, Reports, and Dashboards and move them to Selected Item and Click Next.

The screenshot shows the 'Navigation Items' configuration page. It displays two lists: 'Available Items' (containing 'Dash' and 'Dashboards') and 'Selected Items' (containing 'Bus stations', 'Buses', 'Employees', 'Trips', 'Ticket Fares', 'Reports', and 'Dashboards'). A large red box encloses both lists. A red number '6' is placed to the right of the 'Selected Items' list.

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7. From Available Profiles, select System Administrator and move it to Selected Profiles.
8. Click Save & Finish



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Milestone 5 Fields

Object	Field Name	Data Type
Bus Station	Bus Station Name(Standard)	Text
	Bus Stop Category	Picklist(Unmanaged Bus Stop, Managed Bus Stop)
	Last Updated	Formula(Date)
	Amenities	Picklist (Multi-select)
	City	Text(40)
	Street	TextArea
	State/Province	Text(25)
	Zip/PostalCode	Text(10)
	Shelter Available	Checkbox
	Bench	Checkbox
Bus	Bus Registration No (Standard)	Text
	Bus Station Name	Lookup(Bus Station)
	Capacity	Number(4,0)
	Category	Picklist

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	Model	Picklist(Dependent on Category)
Trip	Trip No(Standard)	Text
	Trip Date	Date
	Bus No	Lookup(Bus)
	Route Name	Lookup(Ticket Fare)
	Arrival Time	Picklist
	Departure Time	Picklist
	Bus Starting Terminal	Text
	Destination Terminal	Text
	Driver Id	Lookup(Employee)
	Driver	Formula
	Conductor Id	Lookup(Employee)
	Conductor	Formula
	Estimated Travel Time	Number
	Frequency Per Day	Number(2,0)
	No. of Stops	Number(2,0)
	Passenger Count	Number(4,0)
	Ticket Fare	Currency(16,2)
	Total Amount	Formula

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Ticket Fare	Route Name(Standard)	Text
	Bus Model	Picklist
	Ticket Fare	Currency(10,2)
Employee	Employee Id(Standard)	Text
	Bus Station Name	Lookup(Bus Station)
	Employee Name	Text
	Role	Picklist
	Date of Birth	Date
	Age	Formula(Number)
	Work Place	Text
	Salary	Currency(18,0)
	Phone	Phone
	Date of Joining	Date
	Date of Retirement	Formula(Date)
	Experience	Formula(Number)
	Street	TextArea
	City	Text
	State/Province	Text
	Country	Text

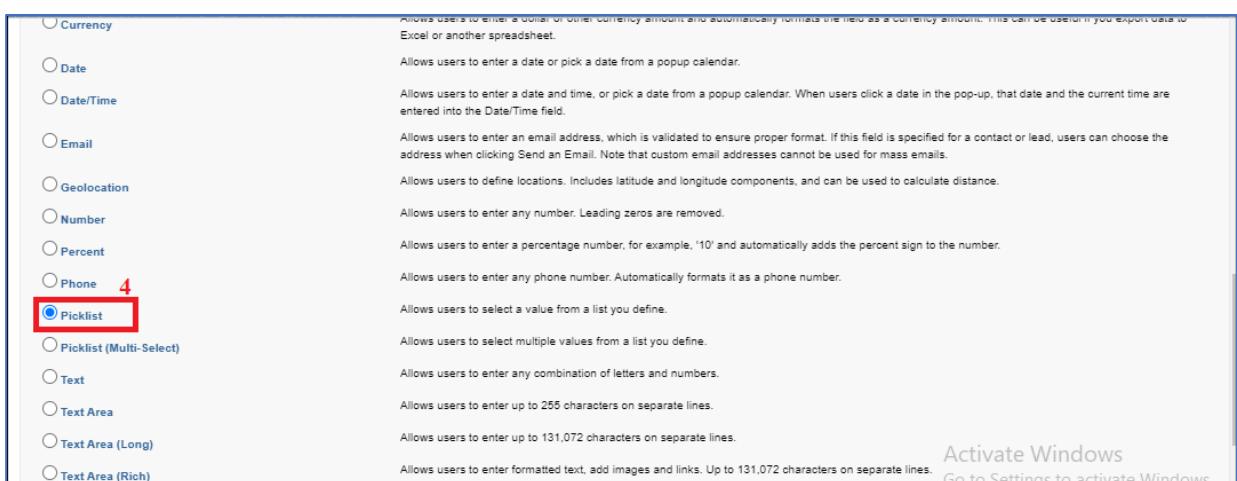
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	Zip/PostalCode	Text
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Activity 1: Creating a Role Picklist Field in Employee Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Employee) in quick find box>> click on the Employee Object.
2. Now click on “Fields & Relationships” .
3. Click on New.
4. Select Data type as “Picklist” and click Next.



5. Enter Field Label as “Role”.
6. In values select “Enter values, with each value separated by a new line” and enter values as shown below.

Administrative Assistant

Cleaner

Conductor

Customer Service Representative

Driver

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Safety Officer

Station Manager

Supervisor

Ticket Inspector

7. Select Display values alphabetically, not in the order entered .

Step 2. Enter the details Step 2 of 4

5 Field Label Role

Values Use global picklist value set 6 Enter values, with each value separated by a new line

6 Station Manager
Administrative Assistant
Customer Service Representative
Safety Officer
Supervisor
Cleaner

7 Display values alphabetically, not in the order entered Use first value as default value Restrict picklist to the values defined in the value set

Field Name Role

Description

Activate Windows Go to Settings to activate Windows.

8. Select Required, Always require a value in this field in order to save a record .

9. Click on Next, Next and Save.

7 Required Always require a value in this field in order to save a record Add this field to existing custom report types that contain this entity

Auto add to custom report type

Default Value Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes: ("the_text"), include numbers without quotes: (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadataType__mdt:RecordAPIName.Field__c

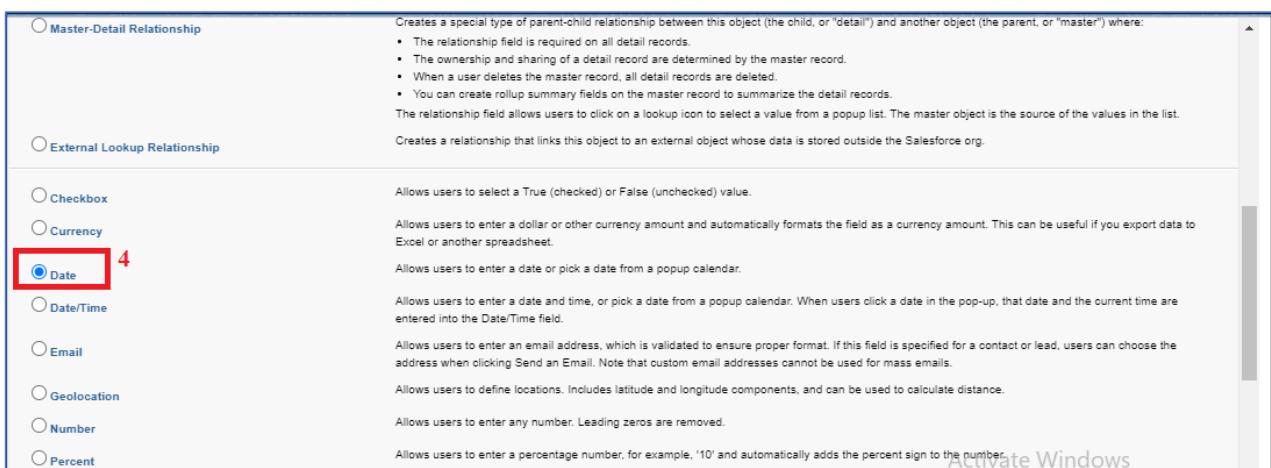
Activate Windows 8 Go to Settings to activate Windows

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Activity 2: Creating a Trip Date Field in Trip object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Trip) in quick find box>> click on the Trip object.
2. Now click on “Fields & Relationships”
3. Click on New.
4. Select Data type as “Date” and click Next.



5. Enter Field Label as “Trip Date”.
6. Select Required, Always require a value in this field in order to save a record .
7. Click on Next, Next and Save.

The screenshot shows the 'New Field' configuration screen. The 'Field Label' is set to 'Trip Date' (highlighted with a red box and number 5). The 'Field Name' is 'Trip_Date'. Under 'General Options', the 'Required' checkbox is checked (highlighted with a red box and number 6). Other settings include 'Data Type' (Date), 'Description' (empty), 'Help Text' (empty), 'Data Owner' (User), 'Field Usage' (None), 'Data Sensitivity Level' (None), and 'Compliance Categorization' (Available: PII, HIPAA, GDPR, PCI; Chosen: empty). The 'Default Value' field is empty.

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Activity 3: Creating a Number Field in Bus object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Bus) in quick find box >> click on the Bus object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Number" and click Next.
5. Enter Field Label as "Capacity".
6. Length - 4, Decimal Places - 0.
7. Select Required, Always require a value in this field in order to save a record .
8. Click on Next, Next and Save.

Activity 4 : Creating Lookup Relationship

A Lookup relationship is a type of relationship in Salesforce that connects two objects together based on a field known as the Lookup field. It establishes a relationship between a child object and a parent object, allowing the child object to reference the parent object.

To Create a relationship from Employee to Bus Station .

1. Go to the Setup page >> click on Object manager >> type object name(Employee) in the quick find bar >> click on the Employee object.
2. Click on fields & relationship
3. Click on New.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar has 'SETUP > OBJECT MANAGER' and the object name 'Billing'. On the left, there's a sidebar with 'Details' (marked with a red '2') and 'Fields & Relationships' (marked with a red '2'). Below the sidebar are links for 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', and 'Compact Layouts'. The main content area is titled 'Fields & Relationships' with a sub-header '4 Items, Sorted by Field Label'. A table lists four fields: 'Billing No' (Field Label), 'Name' (Field Name), 'Auto Number' (Data Type), 'Created By' (Controlling Field), and 'Indexed' (checkbox). The table has columns for 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. At the top of the table are buttons for 'New' (marked with a red '3'), 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. There are also dropdown menus and a search bar at the top of the table.

4. Select "Lookup relationship" as data type and click Next.

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Data Type

Select one of the data types below.

None Selected

Auto Number

Formula

Roll-Up Summary (i)

Lookup Relationship

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Master-Detail Relationship

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field is required on all detail records. The ownership and sharing of a detail record are determined by the master record. You can create rollup summary fields on the master record to summarize the detail records.

Activate Windows
Go to Settings to activate Windows.

5. Select the related object “ Bus Station”.

Employee
New Relationship

Step 2. Choose the related object

Select the other object to which this object is related.

Related To

Step 2

Previous **Next** Cancel

Previous Next Cancel

6. Click on Next

7. Give Field Label as “Bus Station Name” .

Employee
New Relationship

Step 3. Enter the label and name for the lookup field

Field Label (i)

Field Name (i)

Description

Help Text

Child Relationship Name (i)

Required Always require a value in this field in order to save a record

What to do if the lookup record is Clear the value of this field. You can't choose this option if you make this field required.

Step 3 of 6

Previous **Next** Cancel

Activate Windows
Go to Settings to activate Windows.

8. Click on Next , Next, Next , Save.

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Activity 5: Creating a Checkbox Field in Bus Station object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Bus Station) in quick find box>> click on the Bus Station object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Checkbox" and click Next.
5. Enter Field Label as " Shelter available".

Bus Station
New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label [i](#)

Default Value Checked Unchecked

Field Name [i](#)

Description [i](#)

Help Text [i](#)

Auto add to custom report type Add this field to existing custom report types that contain this entity [i](#)

Activate Windows
Go to Settings to activate Windows.

6. Select Default value : Unchecked .

7. Click on Next, Next and Save.

Activity 6: Creating a Phone Field in Employee object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Employee) in quick find box>> click on the Employee object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Phone" and click Next.
5. Enter Field Label as " Phone No".

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The screenshot shows the 'Employee New Custom Field' setup screen. It is on 'Step 2 of 4'. The 'Field Label' field contains 'Phone' and has a red box around it. The 'Next' button at the top right is also highlighted with a red box. Other fields include 'Field Name' (Phone), 'Description' (empty), and 'Help Text' (empty). There are checkboxes for 'Required' (unchecked) and 'Always require a value in this field in order to save a record' (unchecked), and 'Auto add to custom report type' (unchecked) and 'Add this field to existing custom report types that contain this entity' (checked). A note on the right says 'Activate Windows Go to Settings to activate Windows.'

6. Click on Next, Next and Save.

Activity 7: Creating a Last Updated Formula Field in Bus Station object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Bus Station) in quick find box >> click on the Bus Station object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Formula" and click Next.
5. Enter field label Last Updated

The screenshot shows the 'Field Information' setup screen. The 'Field Label' is set to 'Last Updated' and the 'Field Name' is 'Last_Updated'. Both fields have a blue border. Below them are 'Description' and 'Help Text' fields, both of which are empty.

6. Select formula return type Date, Click Next
7. Create and insert Advance formula: TODAY()

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Simple Formula | Advanced Formula |

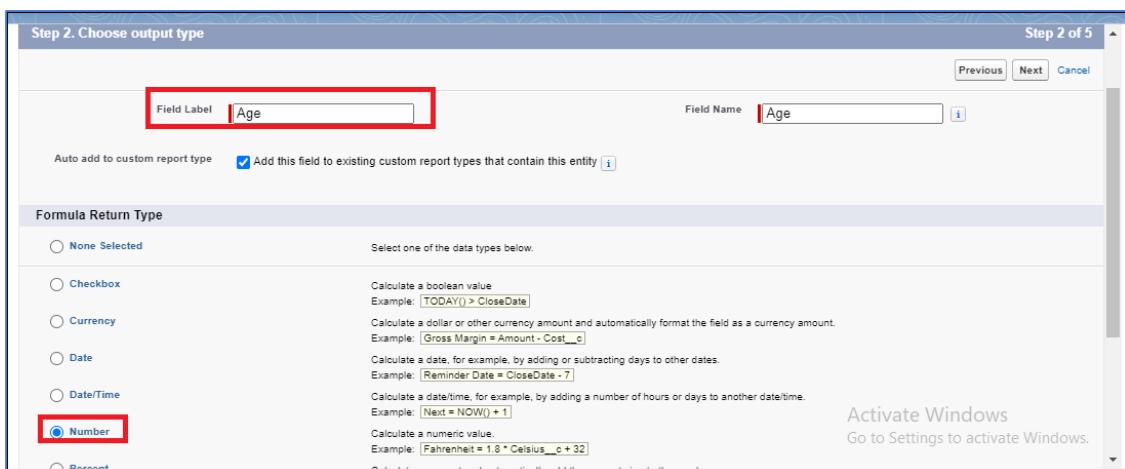
Last Updated (Date) =
TODAY ()

8. Click Next, Next, then Save.

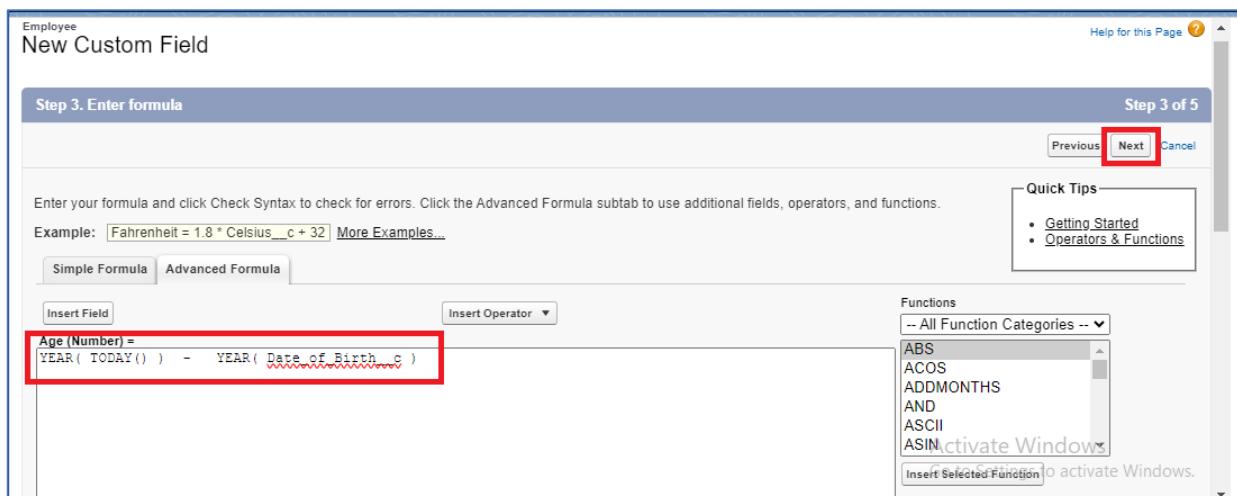
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Activity 8: Creating a Age Formula Field in Employee object

1. Go to setup >> click on Object Manager >> type object name(Employee) in quick find box >> click on the Employee object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Formula" and click Next.
5. Enter field label Age



6. Select formula return type Number, Click Next
7. Create and insert Advance formula: YEAR(TODAY()) - YEAR(Date_of_Birth_c)



8. Click Next, Next, then Save.

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Activity 9: Creating a Date of Retirement Formula Field in Employee object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Employee) in quick find box >> click on the Employee object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Formula" and click Next.
5. Enter field label Date of Retirement
6. Select formula return type Date, Click Next
7. Create and insert Advance formula: DATE(YEAR(Date_of_Birth_c) + 55, MONTH(Date_of_Birth_c) , DAY(Date_of_Birth_c))
8. Click Next, Next, then Save.

The screenshot shows the 'Custom Field Definition Detail' page for a custom field named 'Date of Retirement'. The page includes sections for 'Field Information' and 'Formula Options'. In the 'Field Information' section, the field label is 'Date of Retirement', the field name is 'Date_of_Retirement', and the API name is 'Date_of_Retirement_c'. The object name is 'Employee'. The 'Formula Options' section shows the formula as 'DATE(YEAR(Date_of_Birth_c) + 55, MONTH(Date_of_Birth_c) , DAY(Date_of_Birth_c))'. The page also displays creation and modification details, including the user 'sanjay.polisetty' and the date '6/3/2025, 12:22 AM'.

Activity 10: Creating Experience Formula Field in Employee object

To create fields in an object:

1. Go to setup >> click on Object Manager type object name(Employee) in quick find box >> click on the Employee object.
2. Now click on "Fields & Relationships"

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3. Click on New.
4. Select Data type as "Formula" and click Next.
5. Enter field label Experience

The screenshot shows the 'Field Information' dialog box. It contains four input fields:

- Field Label: Experience
- Field Name: Experience
- Description: (empty)
- Help Text: (empty)

6. Select formula return type Number, Click Next
7. Create and insert Advance formula: YEAR(TODAY()) - YEAR(Date_of_joining_c)

The screenshot shows the formula editor dialog box. It contains a single text area with the formula:
Experience (Number) = YEAR(TODAY()) - YEAR(Date_of_Joining_c)

At the bottom left, there is a 'Check Syntax' button.

8. Click Next, Next, then Save.

Activity 11: Creating a Total Amount Formula Field in Trip object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Trip) in quick find box >> click on the Trip object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Formula" and click Next.
5. Enter field label Total Amount.

The screenshot shows the 'Field Information' dialog box. It contains four input fields:

- Field Label: Total Amount
- Field Name: Total_Amount
- Description: (empty)
- Help Text: (empty)

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6. Select formula return type Currency, Click Next.
7. Create and insert Advance formula: Passenger_Count_c * Ticket_Fare_c

The screenshot shows a formula editor interface. At the top, there are two tabs: "Simple Formula" and "Advanced Formula", with "Advanced Formula" being selected. Below the tabs are two buttons: "Insert Field" and "Insert Operator". The main area contains the formula "Total Amount (Currency) = Passenger_Count_c * Ticket_Fare_c".

8. Click Next, Next, then Save.

Activity 12: Creating a Driver Name Formula Field in Trip object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Trip) in quick find box>> click on the Trip object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Formula" and click Next.
5. Enter field label Driver Name.

The screenshot shows the "Field Information" section of the object setup. It includes fields for "Field Label" (containing "Driver Name"), "Field Name" (containing "Driver_Name"), and "Description" and "Help Text" which are currently empty.

6. Select formula return type Text, Click Next.
7. Create and insert Advance formula: Driver_Id_r.Employee_Name_c

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The screenshot shows a formula editor interface. At the top, there are tabs for "Simple Formula" and "Advanced Formula", with "Advanced Formula" selected. Below the tabs are buttons for "Insert Field" and "Insert Operator". The main area contains the formula text: "Driver Name (Text) = Conductor_Id__r.Employee_Name__c". The "Conductor_Id__r" part is highlighted with a red vertical bar.

8. Click Next, Next, then Save.

Activity 13: Creating a Conductor Name Formula Field in Trip object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Trip) in quick find box >> click on the Trip object.
2. Now click on "Fields & Relationships"
3. Click on New.
4. Select Data type as "Formula" and click Next.
5. Enter field label Conductor Name.

The screenshot shows the "Custom Field Definition Edit" screen. At the top right are buttons for "Save", "Quick Save", and "Cancel". The main area is titled "Field Information". It includes fields for "Field Label" (set to "Conductor Name"), "Field Name" (set to "Conductor_Name"), "Description" (empty), and "Help Text" (empty). The "Field Label" field is highlighted with a blue background.

6. Select formula return type Text, Click Next.
7. Create and insert Advance formula: Conductor_Id__r.Employee_Name__c

The screenshot shows a formula editor interface. At the top, there are tabs for "Simple Formula" and "Advanced Formula", with "Advanced Formula" selected. Below the tabs are buttons for "Insert Field" and "Insert Operator". The main area contains the formula text: "Conductor Name (Text) = Conductor_Id__r.Employee_Name__c". The "Conductor_Id__r" part is highlighted with a red vertical bar.

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8. Click Next, Next, then Save.

Activity 14: Create a Global Value Set

1.

1. From the Setup menu, enter "Picklist Value Sets" in the Quick Find box and select it.
2. Click on "New" to create a new global value set.



3. Enter the label Bus Time.
4. In values select "Enter values, with each value separated by a new line" and enter values as shown below.

6:00 AM

7:00 AM

8:00 AM

9:00 AM

10:00 AM

11:00 AM

12:00 PM

1:00 PM

2:00 PM

3:00 PM

4:00 PM

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5:00 PM

6:00 PM

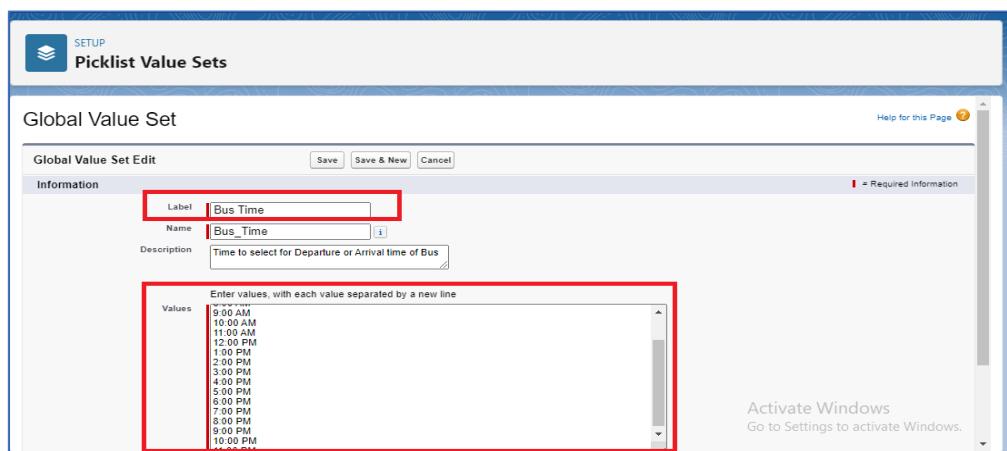
7:00 PM

8:00 PM

9:00 PM

10:00 PM

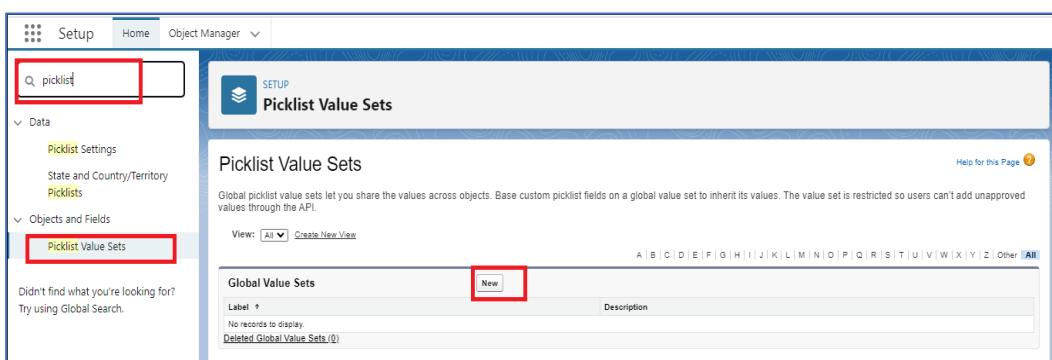
11:00 Pm



- Click "Save" to create the global value set

Activity 15: Create a Global Value Set for bus model

- From the Setup menu, enter "Picklist Value Sets" in the Quick Find box and select it.
- Click on "New" to create a new global value set.



- Enter the label Bus Model.

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Information	
Label	Bus Mode
Name	Bus_Model i
Description	

4. In values select "Enter values, with each value separated by a new line" and enter values as shown below

Regular

Metro

A/C

Express

Deluxe

Super Deluxe

Semi Sleeper

Sleeper

Activity 16: Creating a Picklist Field using global picklist value set in Trip Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Employee) in quick find box>> click on the Employee Object.
2. Now click on "Fields & Relationships" .
3. Click on New.
4. Select Data type as "Picklist" and click Next.
5. Enter Field Label as "Arrival Time".

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Field Information	
Field Label	Arrival Time
Field Name	Arrival_Time
Description	
Help Text	

6. Select "Use global picklist value set" and choose the global value set "Bus Time".
7. Click on Next, Next and Save.

Activity 17: Creating a Controlled and Dependent Picklists in Bus object

Creating Controlling picklist field in Bus object:

1. Go to setup >> click on Object Manager >> type object name(Bus) in quick find box >> click on the Bus Object.
2. Now click on "Fields & Relationships" .
3. Click on New.
4. Select Data type as "Picklist" and click Next.
5. Enter Field Label as "Category".

Field Information	
Field Label	Category
Field Name	Category
Description	
Help Text	

6. In values select "Enter values, with each value separated by a new line" and enter values as shown below.
Local
Intercity
InterState
7. Select Required, Always require a value in this field in order to save a record .

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General Options

Required	<input checked="" type="checkbox"/> Always require a value in this field in order to save a record
Unique	<input type="checkbox"/> Do not allow duplicate values
External ID	<input type="checkbox"/> Set this field as the unique record identifier from an external system
AI Prediction	<input type="checkbox"/> Use this field to store AI prediction scores
Default Value	Show Formula Editor <input type="text"/>

Use formula syntax: Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mdt.RecordAPIName.Field__c

8. Click on Next, Next and Save.

Creating Dependent pickliest field in Bus object:

1. Go to setup >> click on Object Manager >> type object name(Bus) in quick find box >> click on the Bus Object.
2. Now click on "Fields & Relationships" .
3. Click on New.
4. Select Data type as "Picklist" and click Next.
5. Enter Field Label as "Category".

Field Information

Field Label	<input type="text" value="Category1"/>	Data Type	Picklist
Field Name	<input type="text" value="Category1"/>		
Description	<input type="text"/>		
Help Text	<input type="text"/>		

6. Select "Use global picklist value set" and choose the global value set "Bus Time".
7. Select Required, Always require a value in this field in order to save a record .

General Options

Required	<input checked="" type="checkbox"/> Always require a value in this field in order to save a record
Unique	<input type="checkbox"/> Do not allow duplicate values
External ID	<input type="checkbox"/> Set this field as the unique record identifier from an external system
AI Prediction	<input type="checkbox"/> Use this field to store AI prediction scores
Default Value	Show Formula Editor <input type="text"/>

Use formula syntax: Enclose text and picklist value API names in double quotes : ("the_text"), include numbers without quotes : (25), show percentages as decimals: (0.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__mdt.RecordAPIName.Field__c

8. Click on Next, Next and Save.

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Establish the Dependency

1. Go to setup >> click on Object Manager >> type object name(Bus) in quick find box >> click on the Bus Object
2. Now click on "Fields & Relationships" .
3. Now click on "Field Dependencies" .
4. Click on New.

The screenshot shows the 'New' page for creating a field dependency. It has two dropdown menus: 'Controlling Field' and 'Dependent Field', both currently set to '--None--'. At the top right are 'Continue' and 'Cancel' buttons. At the bottom right are another 'Continue' and 'Cancel' button pair.

5. Enter Controlling Field : Category
6. Enter Dependent field : Model
7. Click "Continue".
8. Matrix with the controlling field values on the top and the dependent field values on the side. Check the boxes to define which dependent picklist values should be available for each controlling picklist value.
9. Click Save

The screenshot shows the matrix configuration screen. It displays three columns: Local, Intercity, and Interstate. Each column has a list of vehicle models: Regular, Metro, A/c, Express, Deluxe, Super Deluxe, Semi Sleeper, and Sleeper. The rows are categorized by Category (Local, Intercity, Interstate) and Model (Regular, Metro, A/c). Red boxes highlight specific cells: Local A/c, Intercity Express, and Interstate Sleeper. Buttons for 'Include Values' and 'Exclude Values' are visible at the top and bottom of the matrix. At the bottom are 'Save', 'Cancel', and 'Preview' buttons.

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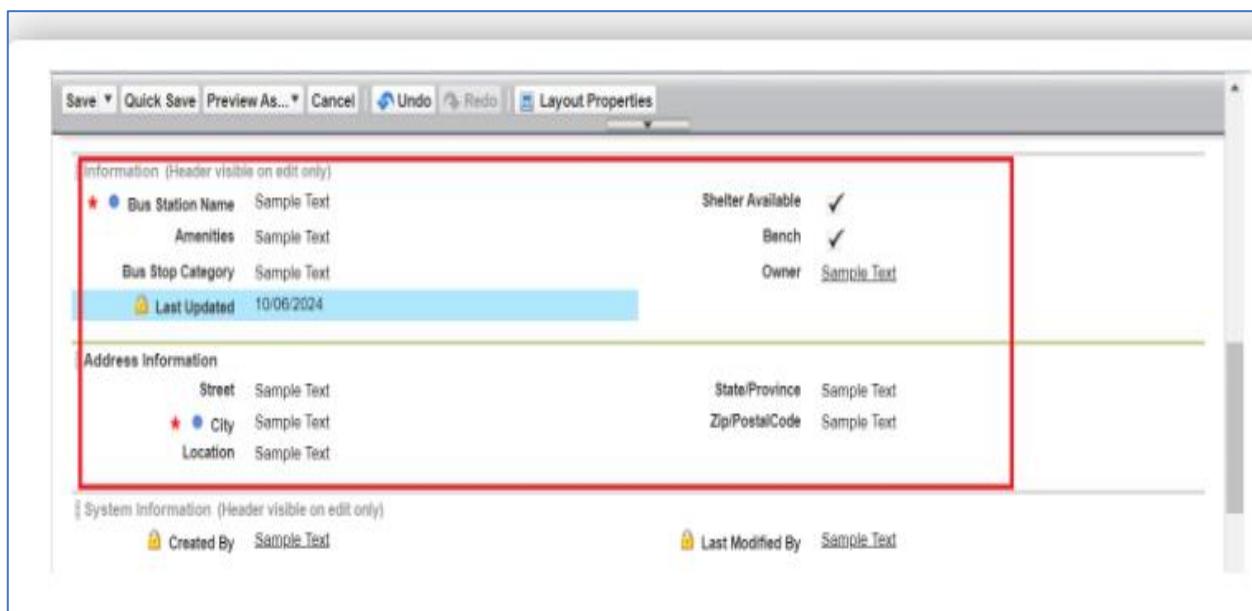
Milestone 6

Editing of Page Layouts

Page layouts in Salesforce control the layout and organization of fields, related lists, custom links, and other elements on a record detail or edit page. They are essential for managing how data is presented to users and can vary based on user roles and profiles.

Activity 1: To edit a Page Layout in Bus Station Object

1. Go to setup >> click on Object Manager >> type object name(Bus Station) in quick find box >> click on the Bus Station object >> Page Layouts .
2. Click on the Bus Station Layout.
3. Drag and Arrange the field as shown below.

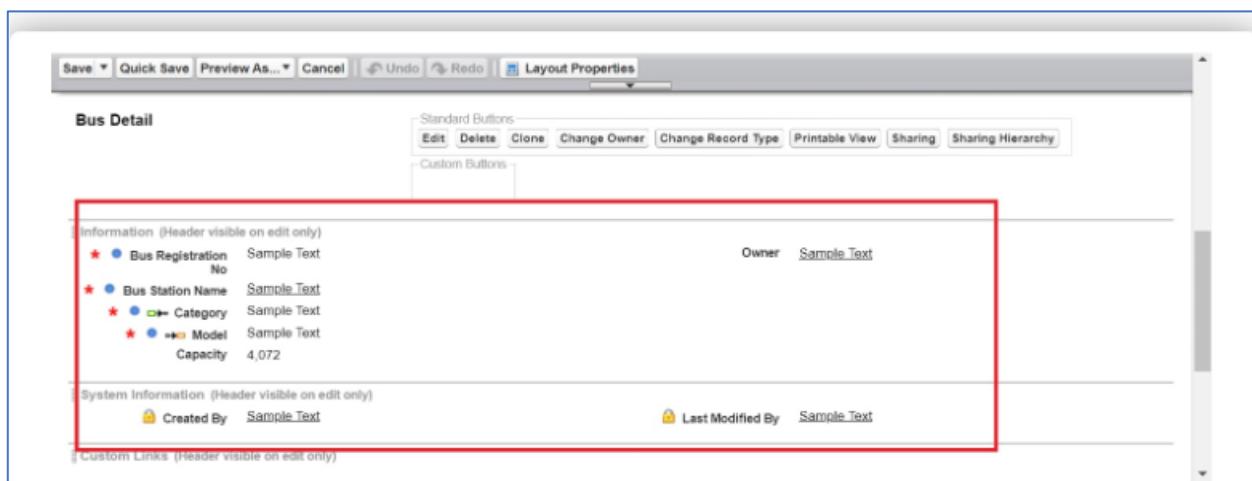


4. Click on field Last Updated >> click on settings >> select Read Only and save it.
5. Click on Save.

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Activity 2: To create a Page Layout in Bus Object

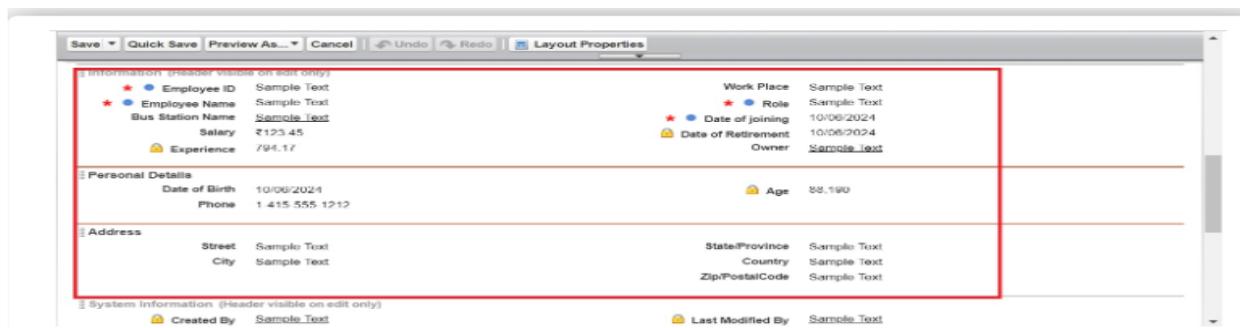
1. Go to setup >> click on Object Manager >> type object name(Bus) in quick find box >> click on the Bus object >> Page Layouts.
2. Click on the Bus Layout
3. Drag and Arrange the field as shown below



4. Click Save

Activity 3: To create a Page Layout in Employee Object

1. Go to setup >> click on Object Manager >> type object name (Employee) in quick find box >> click on the Employee object >> Page Layouts.
2. Click on the Employee Layout
3. Drag and Arrange the field as shown below



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4. Click Save.

Activity 4: To create a Page Layout in Trip Object

1. Go to setup >> click on Object Manager >> type object name(Trip) in quick find box >> click on the Trip object >> Page Layouts.
2. Click on the Trip Layout
3. Drag and Arrange the field as shown below

The screenshot shows the Salesforce Page Layout editor for the Trip object. The layout is structured into three main sections:

- Information (Header visible on edit only):** Contains fields for Trip No (Sample Text), Trip Date (10/06/2024), Bus No (Sample Text), Driver Id (Sample Text), Driver Name (Sample Text), Conductor Id (Sample Text), Conductor Name (Sample Text), and Owner (Sample Text).
- Bus Schedule:** Contains fields for Route Name (Sample Text), Bus Starting Terminal (Sample Text), Departure Time (Sample Text), No. of Stops (34), Estimated Travel Time (995.77), Destination Terminal (Sample Text), Arrival Time (Sample Text), and Frequency Per Day (45).
- Passenger Information:** Contains fields for Passenger Count (5,691), Ticket Fare (₹123.45), and Total Amount (₹123.45).

4. Click on field Ticket Fare >> click on settings >> select Read Only and save it.
5. Click Save.

Activity 5: To create a Page Layout in Ticket Fare Object

1. Go to setup >> click on Object Manager >> type object name(Ticket Fare) in quick find box >> click on the Ticket Fare object >> Page Layouts.
2. Click on the Ticket Layout
3. Drag and Arrange the field as shown below

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The screenshot shows a CRM application's layout editor interface. At the top, there are standard toolbar buttons: Save, Quick Save, Preview As..., Cancel, Undo, Redo, and Layout Properties. On the left, a sidebar titled 'Fields' lists various options: Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, and Report Charts. The main workspace displays a form layout. At the top of the form, there is a 'Quick Find' field labeled 'Field Name'. Below it is a grid of fields:

Section	Last Modified By
Blank Space	Owner
Bus Model	Route Name
Created By	Ticket Fare

A tooltip for the 'Last Modified By' field indicates it is a 'Label: Last Modified By' of type 'Lookup'. A note below the grid states: 'This item is currently in use (click to locate)'. The form is divided into sections: 'Information (Header visible on edit only)' which contains fields for Route Name (Sample Text), Bus Model (Sample Text), and Ticket Fare (₹123.45); 'System Information (Header visible on edit only)' which contains fields for Created By (Sample Text), Last Modified By (Sample Text), and Owner (Sample Text). The 'Information' section is highlighted with a red border.

4. Click Save.

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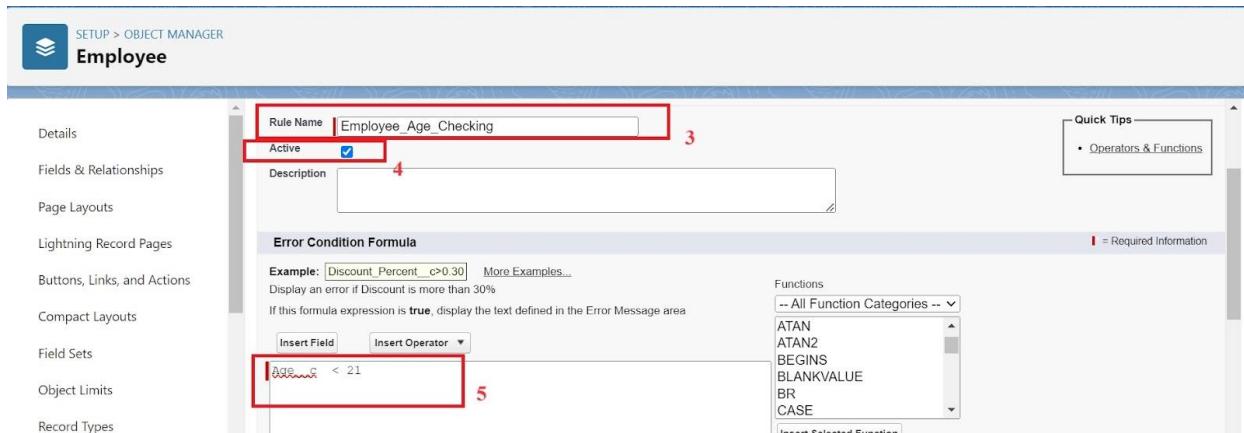
Milestone 7 Validation Rules

Validation rules in Salesforce are used to ensure data integrity by preventing users from entering invalid data into fields. They consist of a logical formula or expression that evaluates the data in one or more fields and returns true or false. If the rule returns true, an error message is displayed, and the record is not saved.

Activity 1: To create a validation rule to a Employee Object

1. Go to setup >> click on Object Manager >> type object name(Employee) in quick find box >> click on the Employee object
2. Click on the validation rule >> click on New.
3. Enter the Rule name as "Employee_Age_Checking".
4. Select Active
5. Insert the Error Condition Formula as :

Age_c < 21



6. Enter the Error Message as "Employee Age Must be Greater than or equal to 21".
7. Select the Error location as Top of Page
8. Click Save.

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Activity 2: To create a validation rule to a Bus Station on Employee Object

1. Go to setup >> click on Object Manager >> type object name(Employee) in quick find box
>> click on the Banquet Hall object
2. Click on the validation rule >> click on New.
3. Enter the Rule name as "Employees_only_for_Managed_Bus_stops".

Rule Name: Employees only for Managed Bus stops (3)
Active (4)
Description
Error Condition Formula
Example: Discount_Percent__c>0.30 More Examples...
Display an error if Discount is more than 30%
If this formula expression is true, display the text defined in the Error Message area
Insert Field Insert Operator (5)
IF(ISPICKVAL(Bus_Station_Name__r.Bus_Stop_Category__c , "UnManaged Bus Stop") , true, false)
Functions
-- All Function Categories -- ABS ACOS ADDMONTHS AND ASCII ASIN Insert Selected Function ABS(number)

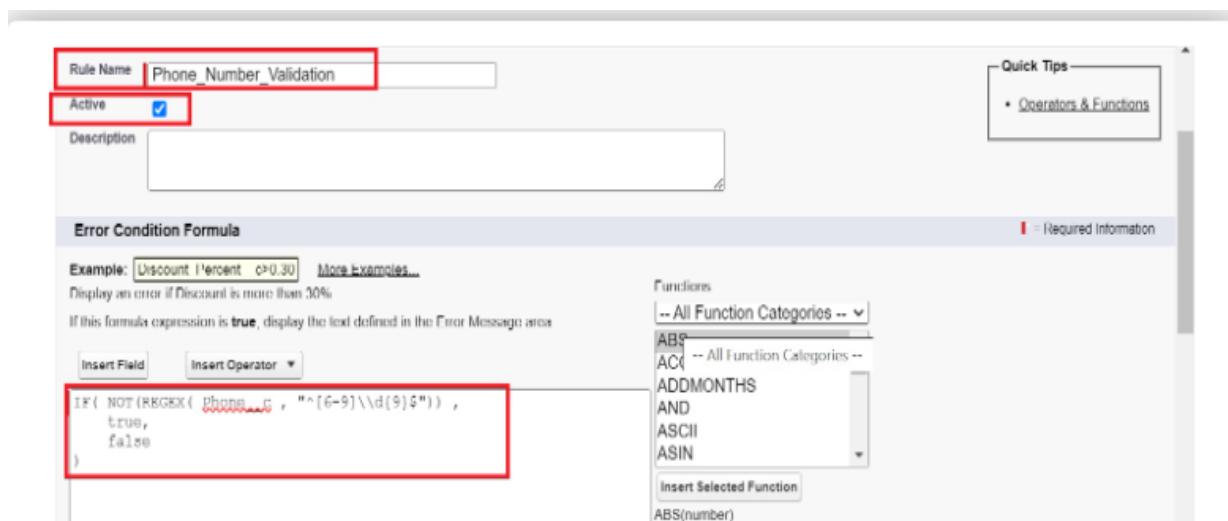
4. Select Active
5. Insert the Error Condition Formula as :
IF(ISPICKVAL(Bus_Station_Name__r.Bus_Stop_Category__c , "UnManaged Bus Stop") , true, false)
6. Enter the Error Message as "The Employees must work for Managed Bus stops".
7. Select the Error location as Field and as Bus Station Name and click Save.

Error Message
Example: Discount percent cannot exceed 30%
This message will appear when Error Condition formula is true (6)
Error Message: The Employees must work for Managed Bus stops
This error message can either appear at the top of the page or below a specific field on the page
Error Location: Top of Page (radio button) Field Bus Station Name (radio button) (7)
Save Save & New Cancel

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Activity 3: To create a validation rule to a Phone No on Employee Object

1. Go to setup >> click on Object Manager >> type object name(Employee) in quick find box >> click on the Employee object
2. Click on the validation rule >> click on New.
3. Enter the Rule name as "Phone_Number_Validation".
4. Select Active
5. Insert the Error Condition Formula as :
`IF(NOT(REGEX(Phone__c , "^[6-9]\\d{9}$")) , true, false)`



6. Enter the Error Message as "Phone no must be 10 digits and starts with 6 or 7 or 8 or 9".
7. Select the Error location as Top of Page and click Save.

Activity 4: To create a validation rule to a Trip Object

1. Go to setup >> click on Object Manager >> type object name(Trip) in quick find box >> click on the Trip object
2. Click on the validation rule >> click on New.

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3. Enter the Rule name as "Departure_and_Arrival_Time_Checking".

4. Select Active

5. Insert the Error Condition Formula as :

TEXT(Departure_Time_c) = TEXT(Arrival_Time_c)

The screenshot shows the 'Rule' configuration screen. A red box highlights the 'Rule Name' field containing 'Departure_and_Arrival_Time_Checking' (labeled 3). Another red box highlights the 'Active' checkbox which is checked (labeled 4). The 'Error Condition Formula' section contains a code input field with the formula 'TEXT(Departure_Time_c) = TEXT(Arrival_Time_c)' (labeled 5). A red box highlights this formula input field. To the right, a 'Functions' dropdown menu is open, showing options like ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, etc. A 'Quick Tips' panel on the right includes a link to 'Operators & Functions'.

6. Enter the Error Message as "The Departure Time and Arrival Time Should not be the same".

7. Select the Error location as Top of Page and click Save.

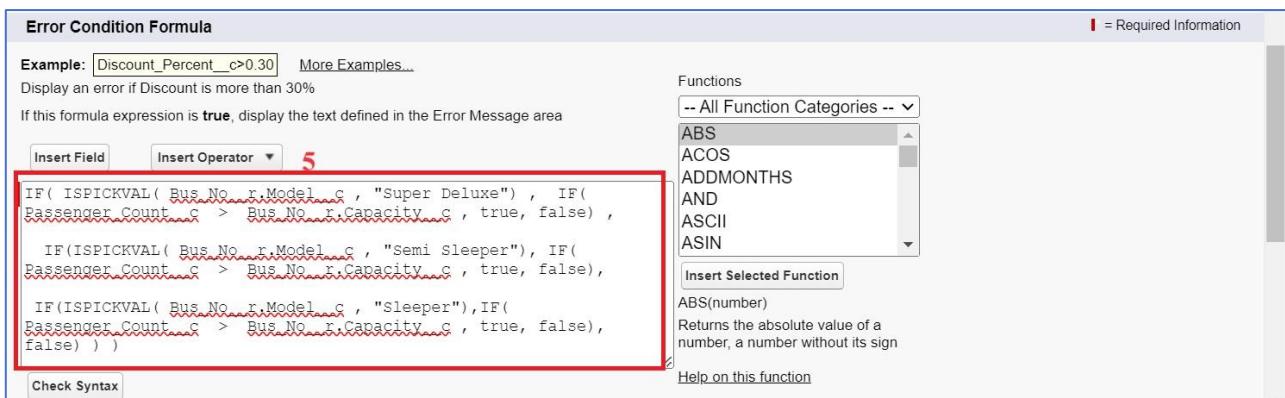
The screenshot shows the 'Error Message' configuration screen. A red box highlights the 'Error Message' field containing 'Booking Date must be a future Date' (labeled 6). Below it, a note says 'This error message can either appear at the top of the page or below a specific field on the page'. At the bottom, a 'Error Location' section has a red box around the 'Field' radio button and the 'Booking Date' dropdown (labeled 7). The 'Save' button is visible at the bottom.

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Activity 5: To create a second validation rule to a Trip Object

1. Go to setup >> click on Object Manager >> type object name(Trip) in quick find box >> click on the Trip object
2. Click on the validation rule >> click on New.
3. Enter the Rule name as "Passenger_Count_Checking_for_Few_Buses".
4. Select Active
5. Insert the Error Condition Formula as :

```
IF( ISPICKVAL( Bus_No_r.Model_c , "Super Deluxe") , IF( Passenger_Count_c >
Bus_No_r.Capacity_c , true, false) ,
IF(ISPICKVAL( Bus_No_r.Model_c , "Semi Sleeper"), IF( Passenger_Count_c >
Bus_No_r.Capacity_c , true, false),
IF(ISPICKVAL( Bus_No_r.Model_c , "Sleeper"),IF( Passenger_Count_c >
Bus_No_r.Capacity_c , true, false), false) ) )
```



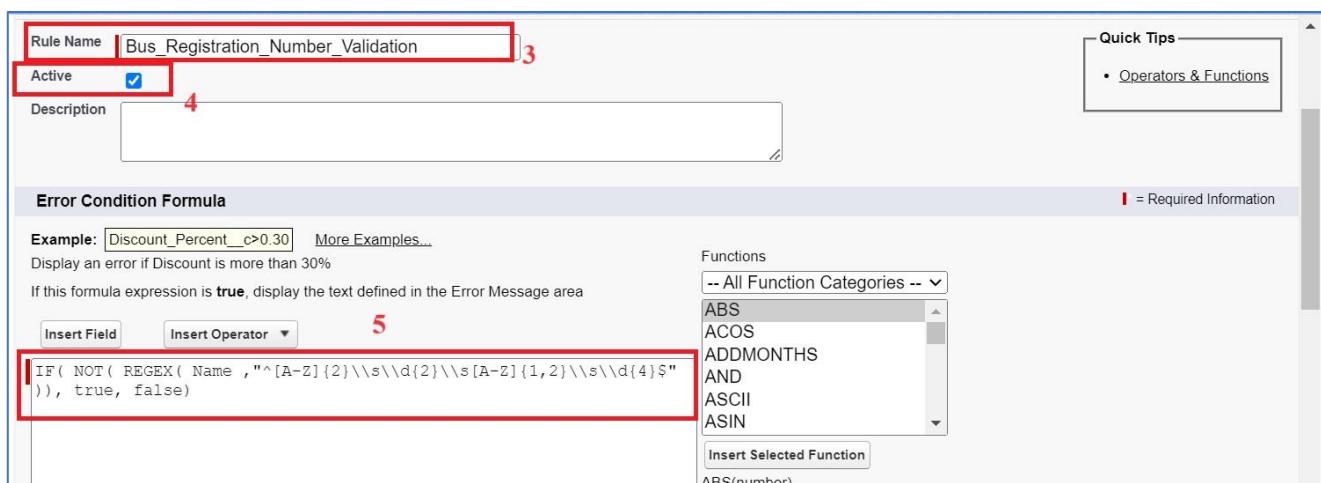
6. Enter the Error Message as "For Super Deluxe, Semi Sleeper and Sleeper Buses ,the Passenger Count must be less than or equal to the Capacity of the Bus".
7. Select the Error location as Field and as Passenger Count and click Save.

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Activity 6: To create a validation rule to a Bus Object

1. Go to setup >> click on Object Manager >> type object name(Bus) in quick find box >> click on the Bus Hall object
2. Click on the validation rule >> click on New.
3. Enter the Rule name as "Bus_Registration_Number_Validation".
4. Select Active
5. Insert the Error Condition Formula as :

IF(NOT(REGEX(Name , "^[A-Z]{2}\s\d{2}\s[A-Z]{1,2}\s\d{4}\$")), true, false)



6. Enter the Error Message as "The bus Registration Number must be in the format of 2 Capital Letters(State Code), space, 2 Numbers (District Code), space 1 or 2 Capital Letters(Series), space and 4 Numbers (Number).".
7. Select the Error location as Field and as Bus Registration No and click Save.

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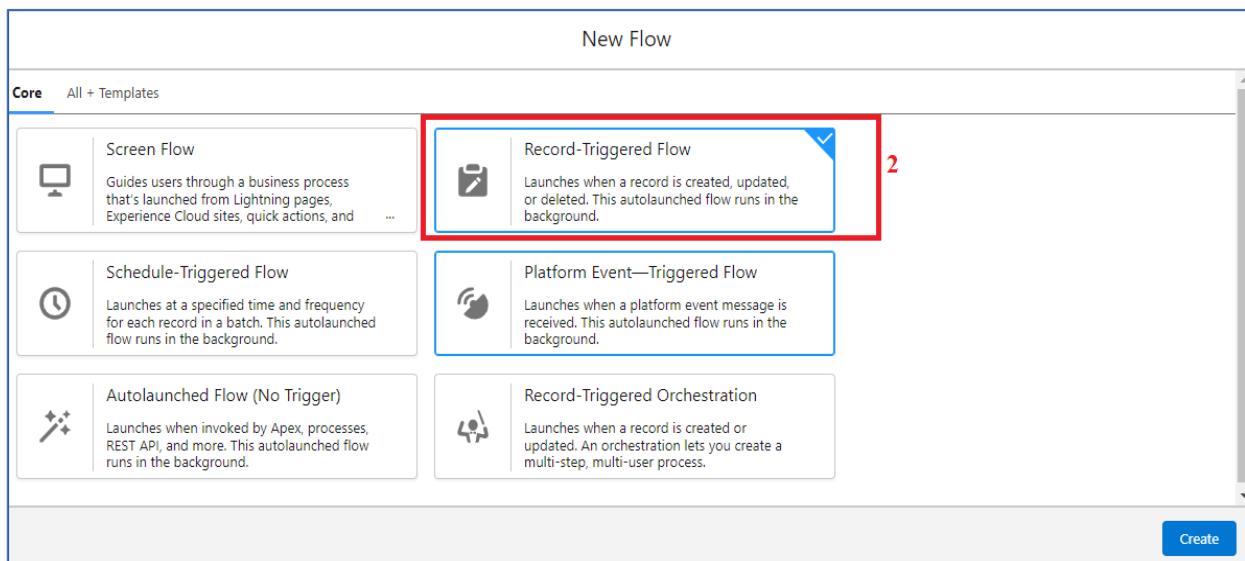
Milestone 8 Flows

In Salesforce, a Flow is an automation tool that allows you to create complex business processes using a visual interface. Flows can be used to collect, update, delete, and create records, as well as to guide users through a series of screens to complete a process.

Activity 1 : Create Flow to Fetch Ticket Fare for Bus.

Note: Please enter Route Name in Ticket Fare object as Hyderabad-Warangal(Express) , Hyderabad-Warangal(Deluxe), ...

1. Go to setup ?type Flow in quick find box ? Click on the Flow and Select the New Flow.
2. Select the record Triggered flow.Click on create.



3. Under Object select "Trip"
4. Select A record is created or updated

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Configure Start

Select Object
Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object Trip 3

Configure Trigger
* Trigger the Flow When:
 A record is created
 A record is updated
 A record is created or updated 4
 A record is deleted

5. Set Entry Conditions : None

6. Select Actions and Related Records and click on Done

Configure Start

Set Entry Conditions
Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements None 5

* Optimize the Flow for:
Fast Field Updates
Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.
Actions and Related Records 6
Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

Cancel Done

7. Under the record trigger flow click on the "+" icon and select Get Records.

8. Enter Label as " Fetching Route Ticket Fares ".

9. For Object select Ticket Fare

Find Salesforce records and store their field values in flow variables.

Label Fetching Route Ticket Fares 8 * API Name Fetching_Route_Ticket_Fares

Description
Getting the records from Ticket Fares based on the bus model

Get Records of This Object
Object Ticket Fare 9

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10. For Condition Requirements , select All Conditions are Met(AND)

For the first condition select as follows:

Field: Id

Operator: Equals

Value: {!\$Record.Route_Name__c}

Filter Ticket Fare Records

Condition Requirements

All Conditions Are Met (AND)

Field	Operator	Value
Id	Equals	Aa \$Record > Route Name X

+ Add Condition

11. For How many Records to store Select Only the First Record.

12. For How to Store Record Data select Choose fields and let Salesforce do the rest. Select Field: Ticket_Fare__c. Click on Done.

How Many Records to Store

Only the first record

All records

How to Store Record Data

Automatically store all fields

Choose fields and let Salesforce do the rest

Choose fields and assign variables (advanced)

Select Ticket Fare Fields to Store in Variable

Field
Ticket_Fare__c

+ Add Field

Cancel Done

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13. From the Toolbox drag and drop Decision element.

14. Enter the Decision label as "Bus Model Checking".

15. For Outcome Details:

- Label : Ticket Fare Checking
- Outcome API Name : Ticket_Fare_Checking
- Condition Requirements to Execute Outcome : All Conditions are Met (AND)
- Resource : {!Fetching_Route_Ticket_Fares.Ticket_Fare__c}
- Operator : Is Null
- Value : {!\$GlobalConstant.False}

The screenshot shows the configuration interface for a decision outcome. At the top, there are fields for 'Label' (Bus Model Checking) and 'API Name' (Bus_Model_Checking). Below these are 'Description' and 'Outcomes' sections. Under 'Outcomes', there is a table for 'OUTCOME ORDER'. The first row contains 'Ticket Fare Checking' in the 'Label' column and 'Ticket_Fare_Checking' in the 'Outcome API Name' column. In the 'Default Outcome' section, the condition 'All Conditions Are Met (AND)' is selected. Below this, a table for 'Condition Requirements to Execute Outcome' is shown, with one row selected: 'Ticket Fare from Fetching_Route_Ticket_Fares > ...' as the resource, 'Is Null' as the operator, and 'False' as the value. At the bottom right are 'Cancel' and 'Done' buttons.

16. Click Done

17. From the Toolbox drag and drop Update Records element and connect to Decision element for Ticket Fare Fetching Output.

18. Enter the label as "Updating Trip Object Ticket Fare Field".

19. How to Find Records to Update and Set Their Values : Use the trip record that triggered the flow

20. Set Filter Conditions : None -Always Update Record

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21. Field : Ticket_Fare__c

Value : {!Fetching_Route_Ticket_Fares.Ticket_Fare__c}

And click Done

The screenshot shows the 'Set Field Values for the Trip Record' section of the Flow Builder. A red box highlights the 'Field' dropdown, which is set to 'Ticket_Fare__c'. To its right is a 'Value' dropdown containing the expression '{!Fetching_Route_Ticket_Fares.Ticket_Fare__c}', also highlighted with a red box. Below these are 'Cancel' and 'Done' buttons.

22. From the Toolbox drag and drop Custom Error Message element and connect to Default Outcome of Decision element..

23. Enter the label as "Route with Bus Model Does not Exists".

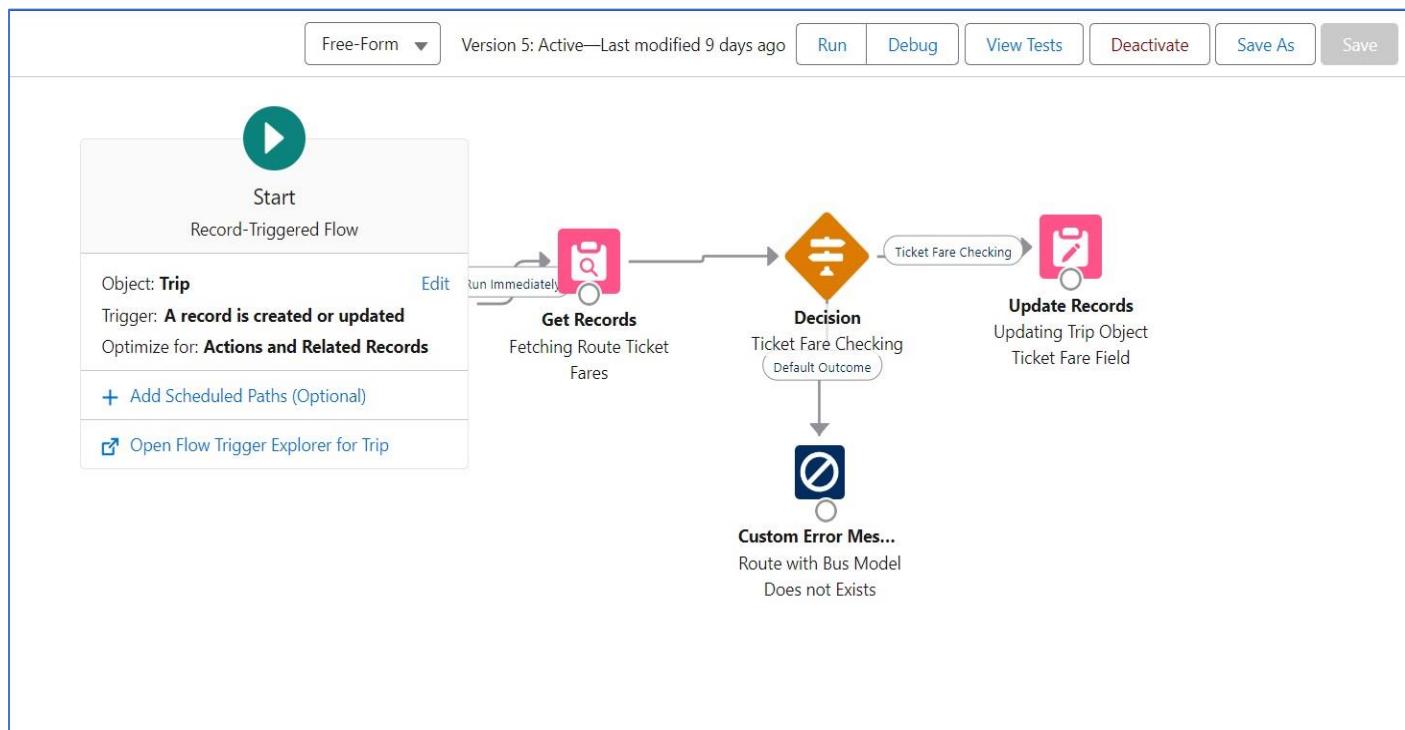
24. For Where to Show the Error Message: Select In a window on a record page

Error Message: There is no Record with the Route {!\$Record.Route_Name__r.Name} and Bus Model {!\$Record.Bus_No__r.Model__c} in the Ticket Fares

The screenshot shows the 'Set Error Message 1 Details' configuration. A red box highlights the 'Where to Show the Error Message:' dropdown, which is set to 'In a window on a record page'. Below it is an 'Error Message' input field containing the text 'There is no Record with the Route {!\$Record.Route_Name__r.Name} and the Bus Model {!\$Record.Bus_No__r.Model__c} in the Ticket Fares', also highlighted with a red box. At the bottom are 'Add Error Message' and 'Done' buttons.

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26. Click Done
27. Save the flow as "Fetching Ticket Fare For Bus"
28. Activate the flow.



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Milestone 9 Triggers

Triggers in Salesforce are pieces of Apex code that execute before or after specific database operations, such as insert, update, delete, or undelete. They allow you to perform custom actions on records in Salesforce when certain events occur. Triggers are particularly powerful for enforcing business logic and automating workflows.

Activity 1 : Create a Trigger to validate whether the Driver Id and Conductor Id are correct or not.

Step 1: Login to salesforce

Log in to your Salesforce account with administrative privileges.

Step 2:

i) Navigate to Setup: Once logged in, click on the gear icon ?? (Setup) located at the top-right corner of the page. This will open the Setup menu.

ii) Click on Developer Console: Click on the "Developer Console" option from the Setup menu. This will open the Developer Console in a new browser tab or window.

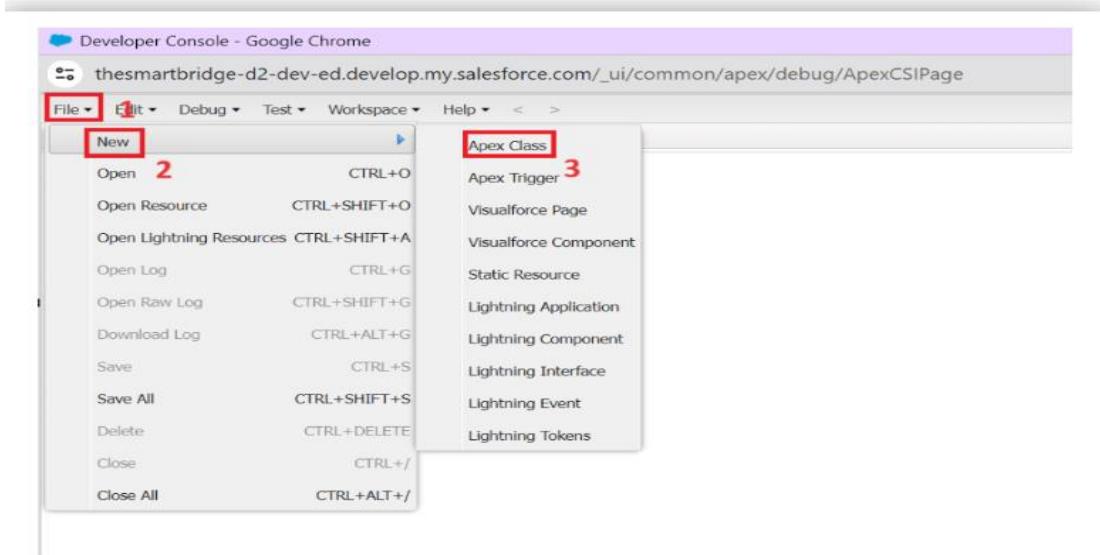
Step 3:

1) In the Developer Console window, go to the top menu and click on "File".

2) Select New: From the dropdown menu under "File", select "New".

3) Choose Apex Class: In the submenu that appears, select "Apex Class". This will open a new Apex Class editor tab.

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Give Class Name : TripTriggerHandlerClass

Create an Apex Class:

```
Public class TripTriggerHandlerClass {  
  
// Checking whether the entered Driver Id belongs to a Driver or not  
  
public Static void driverValidation(List<Trip__c> tripList){  
  
List<Employee__c> driverList = [SELECT Id, Name FROM Employee__c WHERE Role__c ='Driver'  
];  
  
If(driverList != null){  
  
Map<Id, String> driverMap = new Map<Id, String>();  
  
for(Employee__c emp : driverList ){  
  
driverMap.put(emp.Id, emp.Name);  
  
}  
  
for(Trip__c trip : tripList ){  
  
If(trip.Driver_Id__c!=null){  
  
Boolean hasDriverId = driverMap.containsKey(trip.Driver_Id__c); // hasDriverId will be  
true  
  
If(hasDriverId == false){  
  
tripaddError('The assigned person is not a Driver.');
```

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```
// Checking whether the entered conductor Id belongs to a Conductor or not

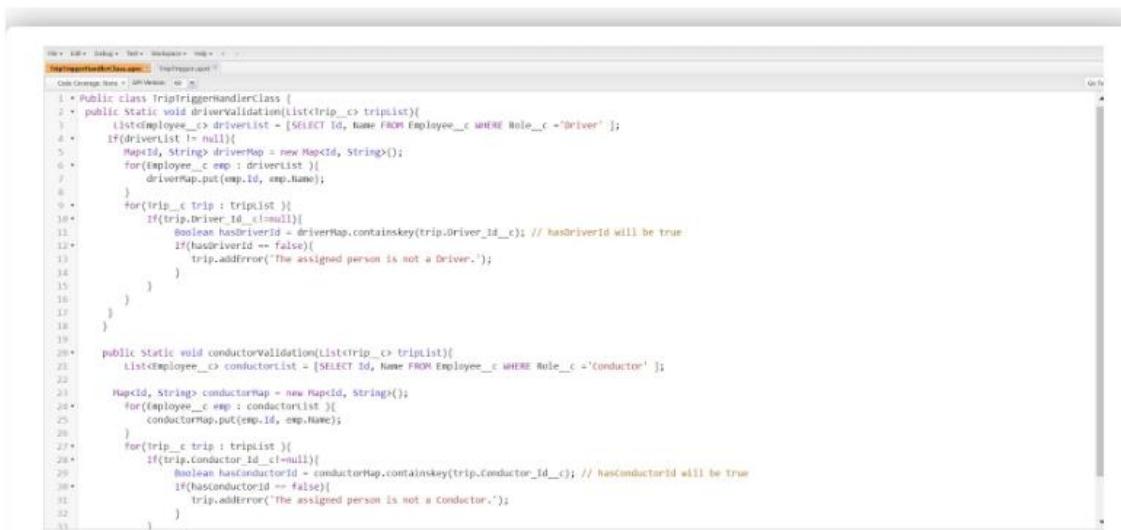
public Static void conductorValidation(List<Trip_c> tripList){

    List<Employee_c> conductorList = [SELECT Id, Name FROM Employee_c WHERE Role_c
='Conductor'];

    Map<Id, String> conductorMap = new Map<Id, String>();
    for(Employee_c emp : conductorList ){
        conductorMap.put(emp.Id, emp.Name);
    }

    for(Trip_c trip : tripList ){
        If(trip.Conductor_Id_c!=null){
            Boolean hasConductorId = conductorMap.containsKey(trip.Conductor_Id_c); // hasConductorId will be true
            If(hasConductorId == false){
                tripaddError('The assigned person is not a Conductor.');
            }
        }
    }
}
```

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```
1 * Public class TripTriggerHandlerClass {
2 *     public static void driverValidation(List<Trip__c> tripList){
3 *         List<Employee__c> driverList = [SELECT Id, Name FROM Employee__c WHERE Role__c = 'Driver' ];
4 *         if(driverList != null){
5 *             Map<Id, String> driverMap = new Map<Id, String>();
6 *             for(Employee__c emp : driverList){
7 *                 driverMap.put(emp.Id, emp.Name);
8 *             }
9 *             for(Trip__c trip : tripList){
10 *                 if(trip.Driver_Id__c!=null){
11 *                     Boolean hasDriverId = driverMap.containsKey(trip.Driver_Id__c); // hasDriverId will be true
12 *                     if(hasDriverId == false){
13 *                         trip.addError('The assigned person is not a Driver.');
14 *                     }
15 *                 }
16 *             }
17 *         }
18 *     }
19 *
20 *     public static void conductorValidation(List<Trip__c> tripList){
21 *         List<Employee__c> conductorList = [SELECT Id, Name FROM Employee__c WHERE Role__c = 'Conductor' ];
22 *
23 *         Map<Id, String> conductorMap = new Map<Id, String>();
24 *         for(Employee__c emp : conductorList){
25 *             conductorMap.put(emp.Id, emp.Name);
26 *         }
27 *         for(Trip__c trip : tripList){
28 *             if(trip.Conductor_Id__c!=null){
29 *                 Boolean hasConductorId = conductorMap.containsKey(trip.Conductor_Id__c); // hasConductorId will be true
30 *                 if(hasConductorId == false){
31 *                     trip.addError('The assigned person is not a Conductor.');
32 *                 }
33 *             }
34 *         }
35 *     }
36 * }
```

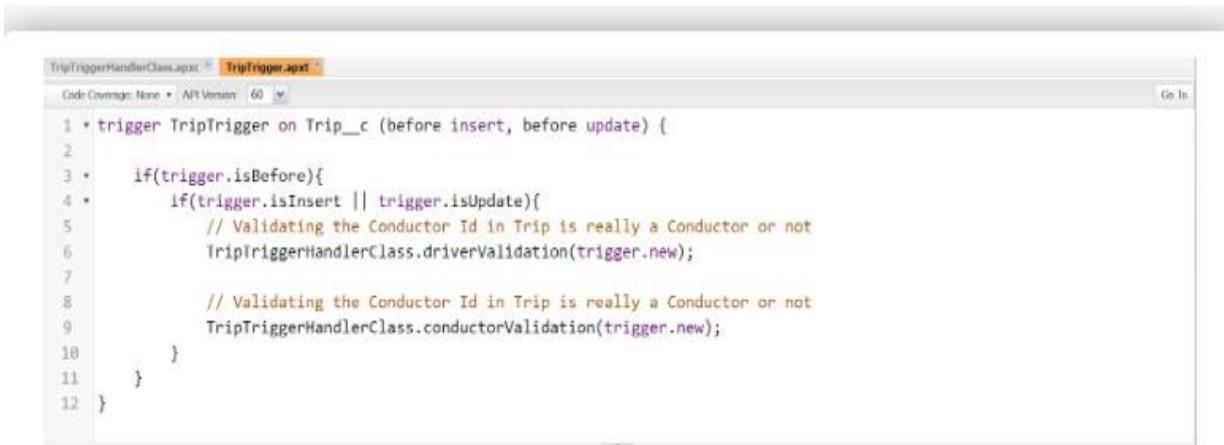
Step 4:

- i) In the Developer Console window, go to the top menu and click on "File".
- ii) Select New: From the dropdown menu under "File", select "New".
- iii) Choose Apex Class: In the submenu that appears, select "Apex Trigger". This will open a new Apex Trigger editor tab.

Create an Apex Trigger:

```
trigger TripTrigger on Trip__c (before insert, before update) {
    if(trigger.isBefore){
        if(trigger.isInsert || trigger.isUpdate){
            // Validating the Conductor Id in Trip is really a Conductor or not
            TripTriggerHandlerClass.driverValidation(trigger.new);
            // Validating the Conductor Id in Trip is really a Conductor or not
            TripTriggerHandlerClass.conductorValidation(trigger.new);
        }
    }
}
```

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The screenshot shows a code editor window with the title "TripTriggerHandlerClass.apxc" and the tab "TripTrigger.apxt" selected. The code is written in Apex and defines a trigger for the "Trip__c" object. The trigger logic checks if the trigger is before insert or update, then validates the conductor and driver IDs.

```
1 * trigger TripTrigger on Trip__c (before insert, before update) {
2
3 *     if(trigger.isBefore){
4 *         if(trigger.isInsert || trigger.isUpdate){
5 *             // Validating the Conductor Id in Trip is really a Conductor or not
6 *             TripTriggerHandlerClass.driverValidation(trigger.new);
7
8 *             // Validating the Conductor Id in Trip is really a Conductor or not
9 *             TripTriggerHandlerClass.conductorValidation(trigger.new);
10    }
11 }
12 }
```

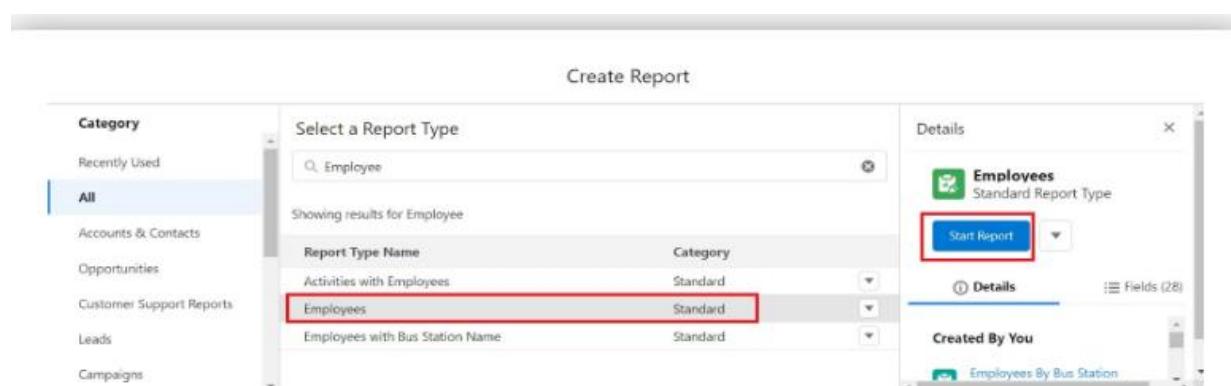
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Milestone 10 Reports

Reports in Salesforce are tools that allow you to analyze and present your Salesforce data in a structured format. They help you understand and monitor key metrics and trends, providing insights into your business operations. Salesforce reports are highly customizable and can be tailored to meet specific business requirements.

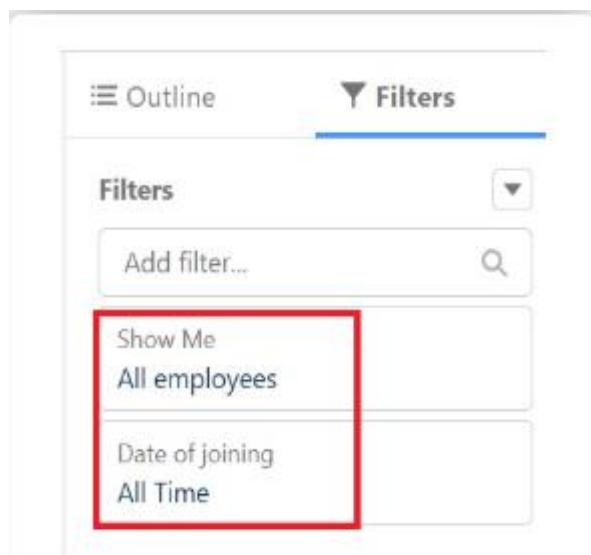
Activity 1: Create a Employees By Bus Station(Summary) Report

1. Click App Launcher
2. Select Public Transport(RTC) App
3. Click on Reports tab
4. Click on New Report.
5. Click the report type as Employees Click Start report.



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6. Click on Filters and select as follows and click on Apply



7. Customize your report, in group rows select – Bus Station Name, for columns Employee ID, Employee Name, Role (In this way we are making a Summary Report).
8. Click save and run
9. Give report name – Employees By Bus Station
10. Click Save

NOTE: In this report you can see your all record of the object you selected for reporting
(What you selects in "Select a report type option")

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Bus Station Name	Employee: Employee ID	Employee Name	Role
Dwarka Bus Station (Visakhapatnam) (1)	EMP-0002	Radha	Station Manager
Subtotal			
JBS (3)	EMP-0005	Sravan	Driver
	EMP-0007	Venu	Driver
	EMP-0001	Krishna	Supervisor
Subtotal			
Kempegowda Bus Station(Bangalore) (1)	EMP-0006	Manohar	Driver
Subtotal			
Mahatma Gandhi Bus Station(MGBS) (2)	EMP-0008	Karthik	Driver
	EMP-0009	Madhu	Conductor
Subtotal			

View Report

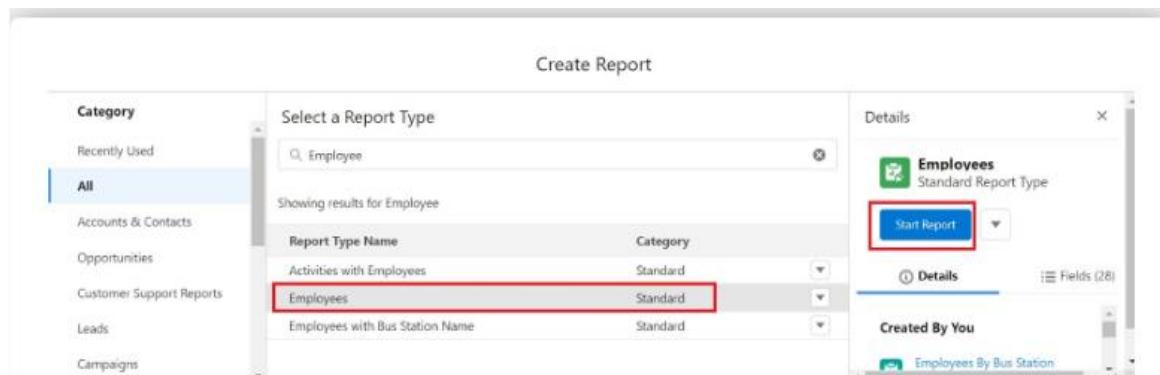
1. Click on App Launcher on the left side of the screen.
2. Search Public Transport(RTC) App & click on it.
3. Click on Reports Tab.
4. Click on Employees By Bus Station and see records.

Bus Station Name	Employee: Employee ID	Employee Name	Role
Dwarka Bus Station (Visakhapatnam) (1)	EMP-0002	Radha	Station Manager
Subtotal			
JBS (3)	EMP-0005	Sravan	Driver
	EMP-0007	Venu	Driver
	EMP-0001	Krishna	Supervisor
Subtotal			
Kempegowda Bus Station(Bangalore) (1)	EMP-0006	Manohar	Driver
Subtotal			
Mahatma Gandhi Bus Station(MGBS) (2)	EMP-0009	Madhu	Conductor
	EMP-0008	Karthik	Driver
Subtotal			
Srinivasa Bus Station (Tirupathi) (2)	EMP-0003	Karthik	Customer Service Representative

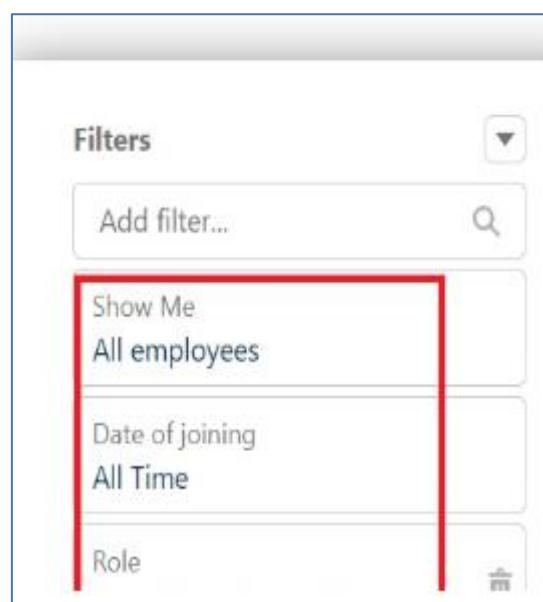
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Activity 2: Create a Drivers and Conductors Information Report

1. Click App Launcher
2. Select Public Transport(RTC) App
3. Click on Reports tab
4. Click on New Report.
5. Click the report type as Employees Click Start report.



6. Click on Filters and select as follows and click on Apply



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7. Customize your report, in group rows select – Bus Station Name, for columns Employee ID, Employee Name, Role (In this way we are making a Summary Report).

8. Click save and run

9. Give report name – Drivers And Conductors Information

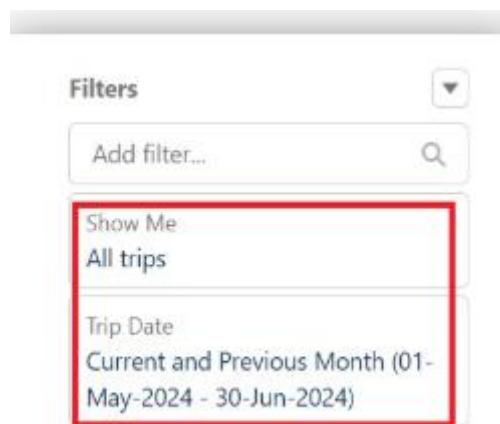
10. Click Save

The screenshot shows the report configuration interface. The report title is 'Drivers and Conductors Information' under the 'Employees' section. The 'Fields' panel on the left has 'Outline' selected, with 'Bus Station Name' highlighted in red. The 'Columns' panel shows 'Employee: Employee ID', 'Employee Name', and 'Role' selected. The main preview area shows a summary of employees by bus station, with data for JBS, Kempegowda Bus Station, Mahatma Gandhi Bus Station, and Srinivasa Bus Station. The 'Save & Run' button is highlighted in red.

Activity 3: Create a Previous and Current Month Trip Details Report

1. Click App Launcher
2. Select Public Transport(RTC) App
3. Click on Reports tab
4. Click on New Report.
5. Click the report type as Trips Click Start report.
6. Click on Filters and select as follows and click on Apply

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7. Customize your report, in group rows select – Trip Date, Bus No , for columns Trip No, Route Name, Passenger Count, Total Amount (In this way we are making a Summary Report).

8. Click save and run

9. Give report name – Previous And Current Month Trips Details

10. Click Save

Trip Data	Bus No	Trip No	Route Name	Passenger Count	Total Amount
05/05/2024	IN 02 AC 0229	1	Edil X Roads - Gokseor-M	90	₹12,600.00
		1	Edil X Roads - Gokseor-M	100	₹14,000.00
		1	Edil X Roads - Gokseor-M	200	₹30,000.00
06/06/2024	TS 02 AC 0229	1	Edil X Roads - Gokseor-M	100	₹14,000.00
		1	Edil X Roads - Gokseor-M	150	₹16,000.00
		1	Edil X Roads - Gokseor-M	250	₹30,000.00
		Total		950	₹38,000.00

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Milestone 11 Dashboards

Dashboards in Salesforce are visual representations of your reports and key metrics, providing a consolidated view of your data. They allow you to monitor performance, track progress, and make informed decisions at a glance. Dashboards are composed of various components such as charts, tables, gauges, and metrics, each displaying data from one or more reports.

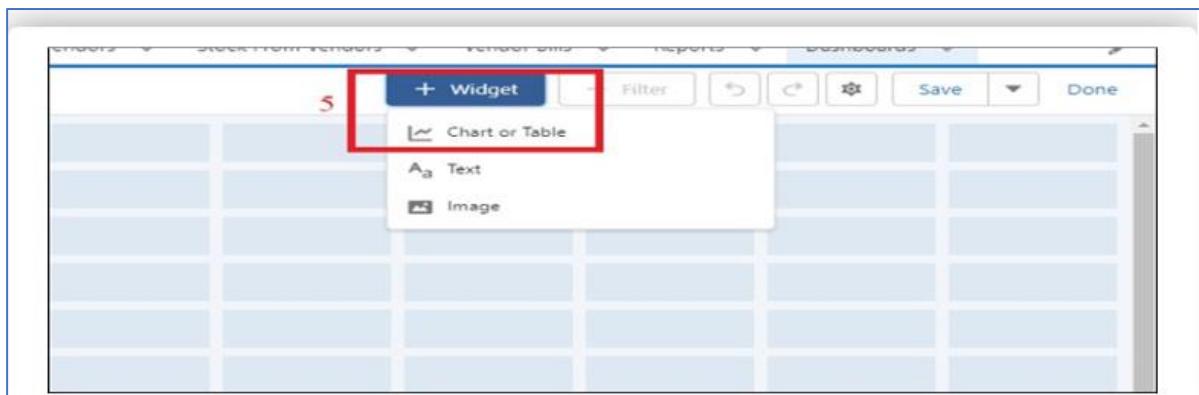
Activity 1: - Create Dashboard

1. Click on the Dashboards tab from the Public Transport(RTC) application.
2. Click on the new dashboard.

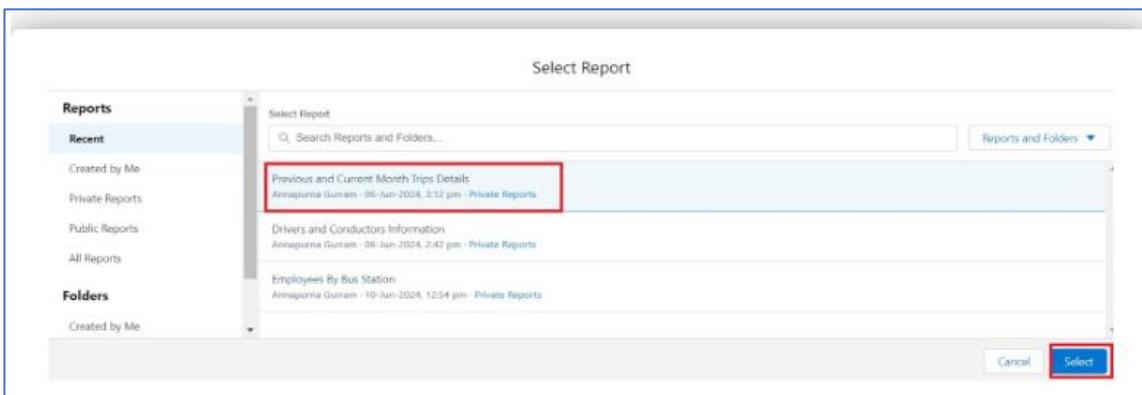
The screenshot shows a 'New Dashboard' dialog box. At the top, it says 'New Dashboard'. Below that is a 'Name' field containing 'Public Transport DashBoard', which is enclosed in a red rectangular box. There is also a 'Description' field and a 'Folder' section with 'Private Dashboards' selected. A 'Select Folder' button is next to the folder dropdown. At the bottom right of the dialog are two buttons: 'Cancel' and 'Create', with the 'Create' button also enclosed in a red rectangular box.

3. Give name - Public Transport DashBoard
4. Click create
5. Click on +widget
6. Select the Previous and Current Month Trips Details Report
7. For the data visualization select any of the charts, tables etc. as per your choice/requirement
8. Click add.
9. Click on +widget

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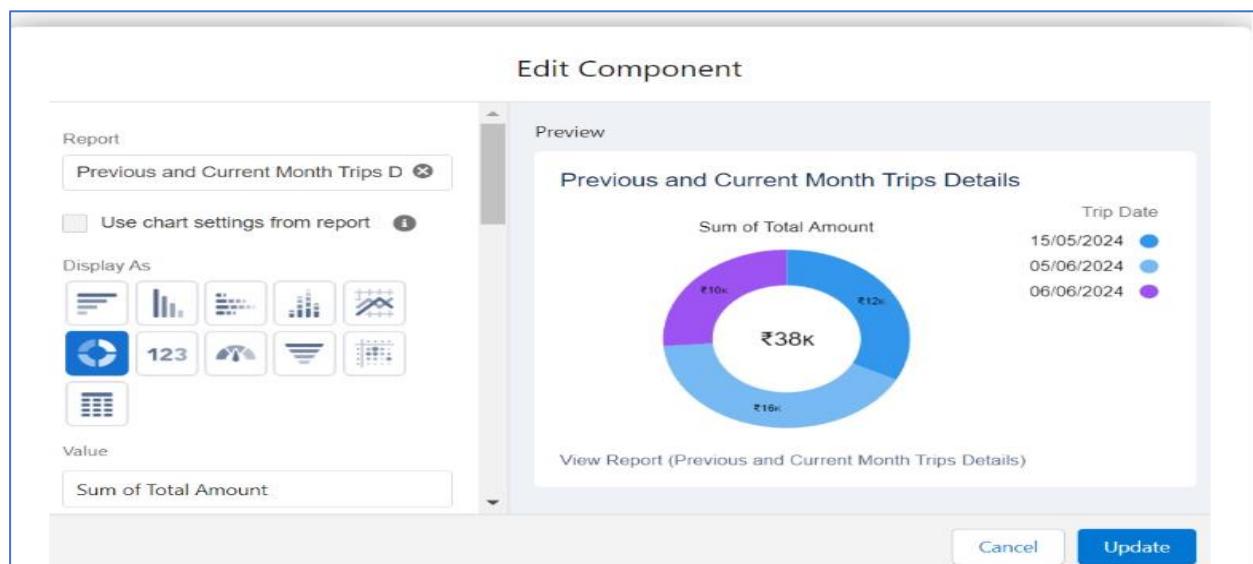
10. Select the Drivers and Conductors Information Report



11. For the data visualization select any of the charts, tables etc. as per your choice/requirement

12. Click add.

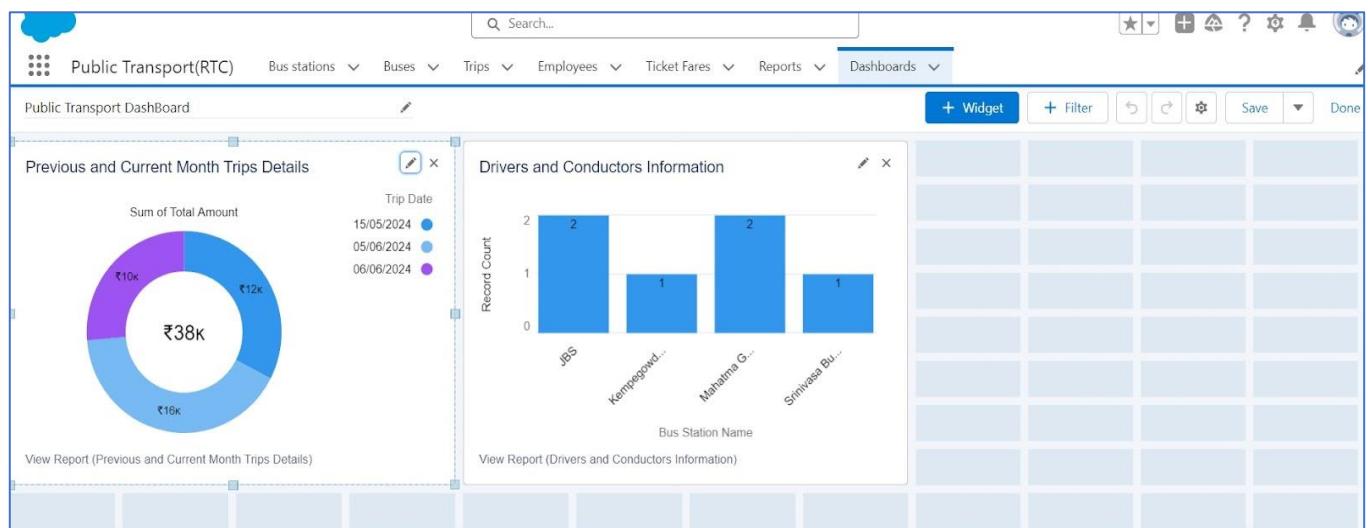
13. Click save.



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Activity 2: View Dashboard

1. Click on App Launcher on the left side of the screen.
2. Search Public Transport(RTC) & click on it.
3. Click on Dashboard Tab.
4. Click on Public Transport DashBoard see graph view of records



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OUT PUTS:

Bus station:-

New Bus Station

* = Required Information

Information

* Bus Station Name

Amenities

Please fill out this field.

Available	Chosen
Accessibility	
Waiting Area	
Information and S...	
Food and Drink	

Shelter available

Bench

Bus Stop Category

--None--

Owner

 sanjay polisetty

- Address Information:

Address Information

Street

State/Province

* City

Zip/PostalCode

Location

Cancel **Save & New** **Save**

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Buses:

New Bus

* = Required Information

Information

Bus Station Name <input type="text" value="Search Bus Stations..."/> 	Owner  sanjay polisetty
* Category <input type="text" value="--None--"/>	
View all dependencies	
Model <input type="text" value="--None--"/>	
View all dependencies	
* Capacity <input type="text"/>	
* Bus Registration No <input type="text"/>	
<input type="button" value="Cancel"/> <input type="button" value="Save & New"/> <input type="button" value="Save"/>	

Employees:

- Information:

New Employee

* = Required Information

Information

* Employee Id <input type="text"/>	Work Place <input type="text"/>
Bus Station Name <input type="text" value="Search Bus Stations..."/> 	* Role <input type="text" value="--None--"/>
Salary <input type="text"/>	Date of Joining <input type="text"/> 
Owner  sanjay polisetty	

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- Personal Details:

Personal Details

Date of Birth

Phone

- Address:

Address

Street

State/Province

City

Country

Zip/PostalCode

[Cancel](#) [Save & New](#) [Save](#)

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Ticket fares:

New Ticket Fare

* = Required Information

Information	
* Route Name	Owner
<input type="text"/>	sanjay polisetty
Ticket Fare	
<input type="text"/>	
Bus Model	
--None--	
<input type="button" value="Cancel"/> <input type="button" value="Save & New"/> <input type="button" value="Save"/>	

- Information:

*Trip Date	Conductor Id
<input type="text"/>	<input type="text"/> Search Employees...
Format: 12/31/2024	
*Trip No	Owner
<input type="text"/>	sanjay polisetty
*Bus No	
<input type="text"/> Search Buses...	
Driver Id	
<input type="text"/> Search Employees...	

- Bus Schedule:

Bus Schedule

*Route Name	Estimated Travel Time
<input type="text"/> Search Ticket Fares...	<input type="text"/>
*Bus Starting Terminal	*Destination Terminal
<input type="text"/>	<input type="text"/>
Departure Time	Arrival Time
--None--	--None--
No. of Stops	Frequency Per Day
<input type="text"/>	<input type="text"/>

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- Passenger Information:

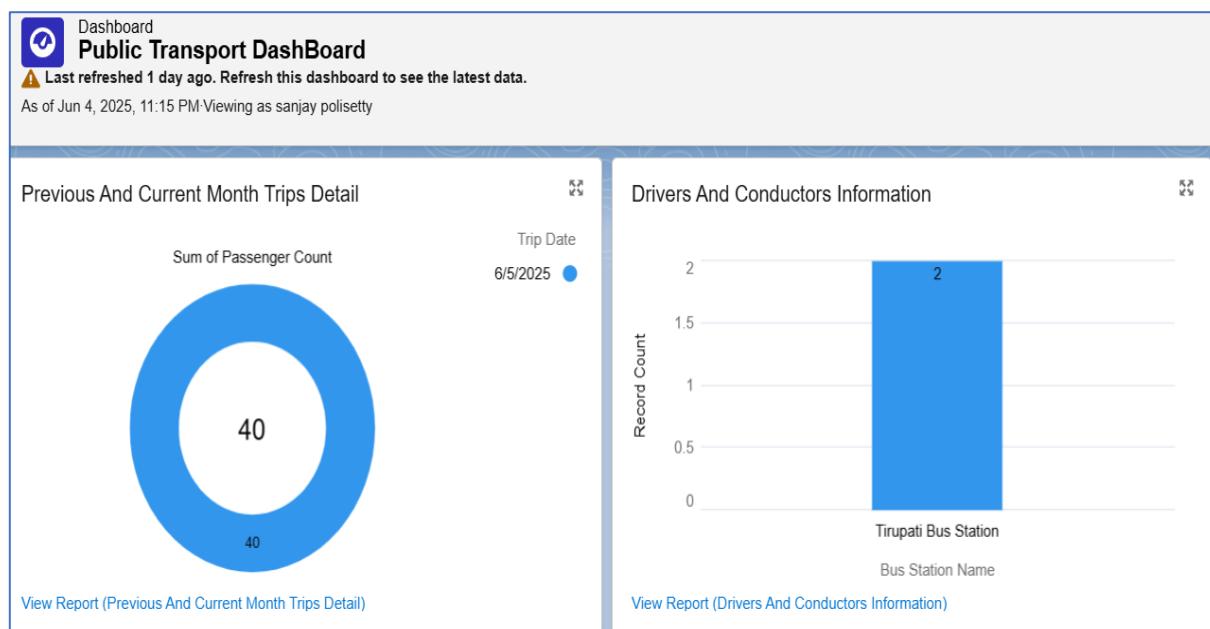
Passenger Information

* Passenger Count	Ticket Fare
<input type="text"/>	<input type="text"/>
<input type="button" value="Cancel"/> <input type="button" value="Save & New"/> <input type="button" value="Save"/>	

Reports:

Reports						
Recent						
4 items						
REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Previous And Current Month Trips Detail		Private Reports	sanjay polisetty	6/4/2025, 9:13 PM	<input type="checkbox"/>
Created by Me	Employees By Bus Station		Private Reports	sanjay polisetty	6/3/2025, 11:42 PM	<input type="checkbox"/>
Private Reports	Drivers And Conductors Information		Private Reports	sanjay polisetty	6/4/2025, 9:06 PM	<input type="checkbox"/>
Public Reports	Which flows run, what's the status of each interview, and how long do users take to complete the screens?					
All Reports	Sample Flow Report: Screen Flows	Public Reports	Automated Process	4/30/2025, 12:24 AM		<input type="checkbox"/>
FOLDERS						

Dashboards:



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Milestone 12

Conclusion

By implementing this Salesforce-based Public Transport(RTC) Management System, the RTC department can significantly improve its operational efficiency, data management, and overall service quality to passengers. Data-driven decision-making capabilities for management. Accurate and up-to-date records of all operational data.