**PROJECT REPORT**

**Vehicle Management System Project Document using Salesforce**

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**1. Introduction**

The Vehicle Management System project aims to streamline and optimize the management of vehicles within the organization using Salesforce as the primary platform. This system will provide a centralized and user-friendly interface for handling all aspects of vehicle

**Creating Developer Account**

Creating a developer org in salesforce.

1.First I Go to developers.salesforce.com/signup

2.And click on sign up.

3.On the sign up form,I entered the following details :

 a.First name & Last name : Surya Bharath Siram

 b.Email : suryabharathsiram117@gmail.com

 c.Role : Developer

 d.Company : Maharajah’s College Autonomous

 e.County : India

 f.Postal Code : 531219

 g.Username : [salesforce@maharaja.com](mailto:salesforce@maharaja.com)

**2. Object:**

**To Create An Object:**

For this Vehicle Management I created three custom objects i.e. Vehicles, Driver and Traveler.

I created the objects as the following below steps.

* Click on the gear icon and then select Setup.
* Click on the object manager tab.
* I click on the Dropdown and select Custom Object.

On the Custom Object Definition page, I created the object as follows:

* Label: **Vehicles**
* Plural Label: **Vehicles**
* Record Name: **Vehicles Name**
* Click on Allow Reports checkbox
* Click on Allow Search checkbox and click on 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.
* Leave all defaults as it is and click on Save.

Similarly I created the **Drivers** and **Travelers** object

**Fields And Relationship**

**Creation Of Fields :**

I followed the below steps to creating Fields.

1.Click on the gear icon and then select Setup.

2.Click on the object manager tab.

3.Search object (Vehicle) in quick find box.

4.Click fields & relationships and click new

5.Select specified data type click on next

6.Enter specified field label name and select next, next, and finally click on Save

**Fields In Vehicle Object**

I created the fields of vehicles as below steps

1. I Click on the gear icon and then select Setup.
2. After that 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. I Selected the appropriate 2 wheelers Brands in each column by double-clicking them.

**Note :** Similarly I created the Driver and Travelers and opportunity fields in Vehicle

**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

**Lightning App**

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.

**Profile :**

**Creating A Profile**

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 and set the profile roles as well.

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**.**

**Users :**

1.From Setup, in the Quick Find box, enter Users, and then select Users.

2.Click New User.

3.Enter the user’s name John Teddy and my 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. I Selected a Role (Vehicle Manager)

5. I Selected a User License As salesforce.

6. I Selected a profile as Vehicle Manager.

**User Adoption :**

**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.Create the records button

6.After created the records I viewed the records whether the records are correct or not and click on save

7.If any record is unnecessary for the project then immediately I deleted the record.

**Report & Dashboards**

**Creating of Report :**

1.Go to Reports and click New Report.

2.Select the Opportunity and Customer Name report type and click Start Report.

3.To begin filtering, click Filters.

4.Click the Show Me standard filter and select All Opportunity. Click Apply.

5.Click on add columns add Opportunity: Opportunity name, Account Name, Amount, Traveler name etc.

6.Reports needs to be Grouped by one field.(ex - Created by )(require to enable add chart)

7.Click Save.

8.Save your report as Opportunity Details and accept the auto-generated unique name.

**Creating of Dashboard :**

1.Click the Dashboards tab.

2.Click New Dashboard.

3.Name the dashboard Opportunity Details and click Create.

4.Click +Component.

5.Select the Opportunity Details and click Select.

6.Select the Vertical Bar Chart component and click Add.

7.Click Save and then Done.

**Note :** After completion of creating the reports and dashboards I viewed the reports and if there corrections then I correct it and then the click on Save.

**Learning Outcomes :**

Learning Outcomes of the Vehicle Management System Project Document using Salesforce:

1. **Understanding Salesforce as a Platform:**

Participants will gain a comprehensive understanding of Salesforce as a powerful platform for building custom applications to manage various business processes, in this case, vehicle management.

1. **Data Modeling and Architecture Design:**

Participants will learn how to design a robust data model and establish relationships between objects to efficiently store and manage vehicle-related information.

1. **Customization and Configuration:**

Participants will acquire skills in customizing Salesforce objects, fields, and page layouts to tailor the Vehicle Management System to meet specific organizational requirements.

1. **User Interface Design:**

Participants will learn about user interface design best practices in Salesforce, including creating intuitive and user-friendly page layouts to enhance user experience.

1. **Role-based Access Control:** Participants will understand how to implement role-based access control and profile management to ensure that users have the appropriate level of access to different functionalities.
2. **Reporting and Analytics:** Participants will explore the capabilities of Salesforce reporting and dashboard features, enabling them to create insightful reports and visualizations for data-driven decision-making.
3. **Project Planning and Management:** Participants will develop project planning and management skills through the detailed documentation of project phases, resource allocation, and timeline establishment.
4. **Risk Assessment and Mitigation:** Participants will learn how to identify potential risks in a project and formulate strategies to mitigate these risks to ensure the project's successful implementation.
5. **User Training and Adoption Strategies:** Participants will gain insights into the importance of user training and adoption strategies to encourage users to embrace the Vehicle Management System effectively.
6. **Real-world Application of Salesforce:** Participants will experience the application of Salesforce in a real-world scenario, understanding how it can be utilized to enhance fleet management practices and streamline operational processes.

THE END