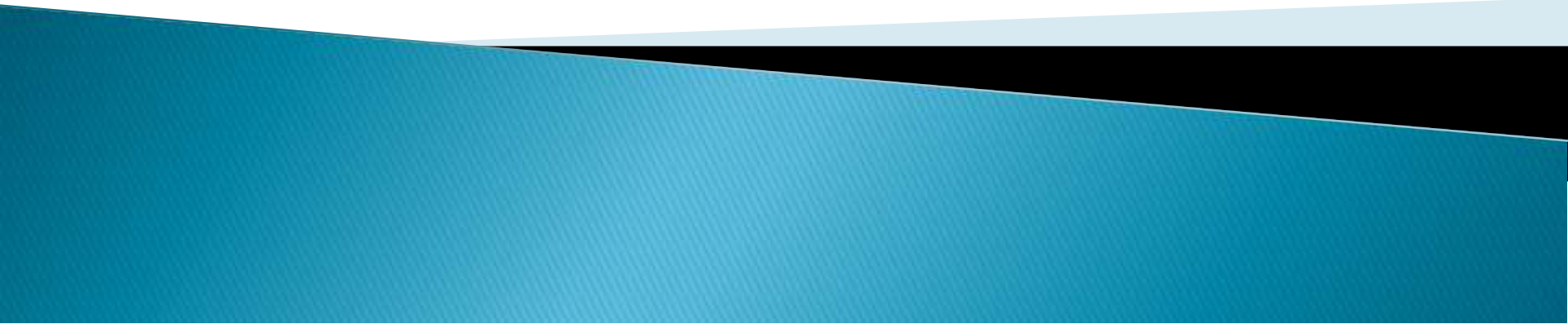
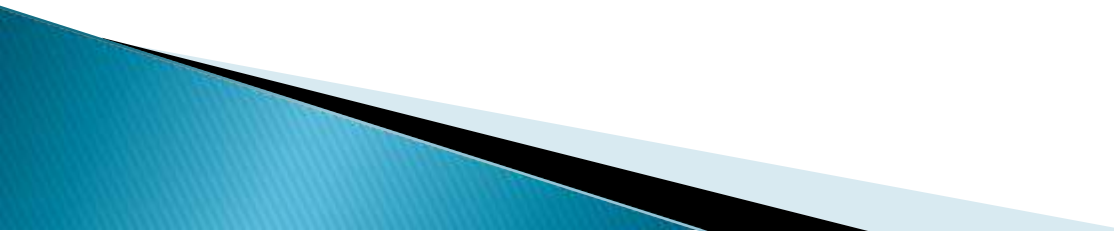


VEHICLE MANAGEMENT SYSTEM

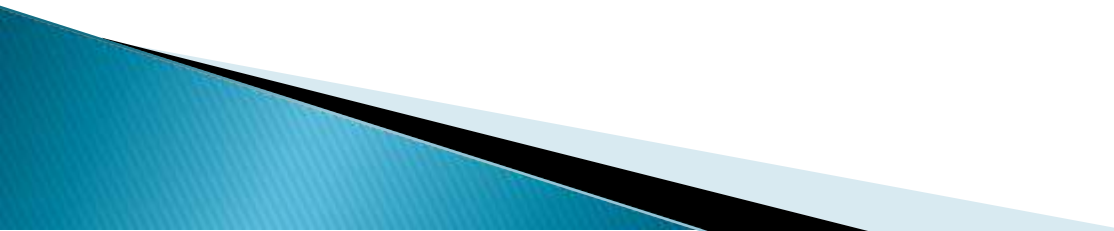
SALESFORCE DEVELOPER



INTRODUCTION

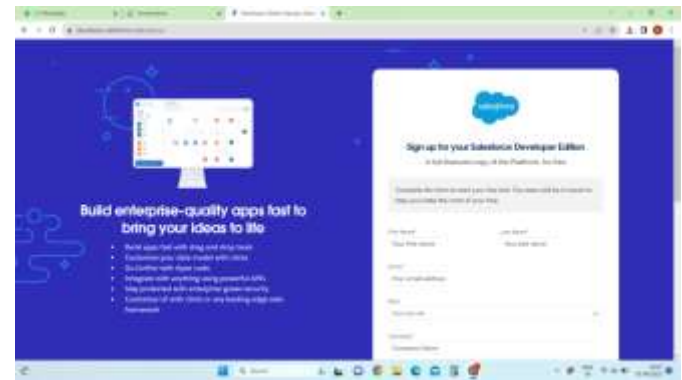
- ▶ Vehicle Management is an application where a customer Details are stored in order to choose cars, bikes and commercial vehicles for travel within the city.
 - ▶ The data which is stored here, further used to remind them if any offers are provided during the seasons and any updates regarding vehicles are sent to them in the form of messages and mails.
 - ▶ Welcome to Salesforce! Salesforce is game-changing technology, with a host of
 - ▶ productivity-boosting features, that will help you sell smarter and faster.
- 

WHAT IS SALESFORCE ?

- ▶ Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.
 - ▶ Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.
 - ▶ So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:
 - ▶ <https://youtu.be/r9EX3IGde5k>
- 

CREATE DEVELOPER ORG IN SALESFORCE

- ▶ 1.Go to developers.salesforce.com/
- ▶ 2.Click on sign up.
- ▶ 3.On the sign up form, enter the following details :
 - ▶ a.First name & Last name
 - ▶ b.Email
 - ▶ c.Role : Developer
 - ▶ d.Company : College Name
 - ▶ e.County : India
 - ▶ f.Postal Code : pin code
 - ▶ g.Username : should be a combination of your name and company
- ▶ This need not be an actual email id, you can give anything in the format : `username@organization.com`



OBJECT

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

- ❖ **Standard Objects:** Account, Contact, Opportunity.
- ❖ **Custom objects:** Vehicle, Driver, Traveler.

CREATE AN OBJECT

- ▶ Click on the gear icon and then select Setup.
- ▶ Click on the object manager tab just beside the home tab.
- ▶ After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.

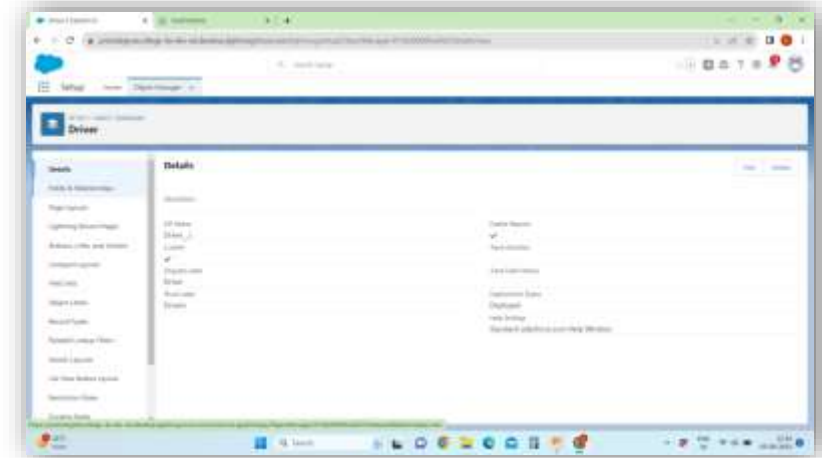


TO CREATE THE VEHICLE OBJECT

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



TO CREATE THE DRIVER OBJECT



Edit Custom Object
Traveler

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 Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

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

Object Name Example: Account

Description

Context Sensitive Help Setting [Open the standard Salesforce.com Help & Training window](#)

TO CREATE THE TRAVELER OBJECT



Details

Description

API Name [Enable Reports](#)

Opportunity [Track Activities](#)

Custom [Track Field History](#)

Singular Label [Deployment Status](#)

Plural Label [Help Settings](#)

[Standard Salesforce.com Help Window](#)

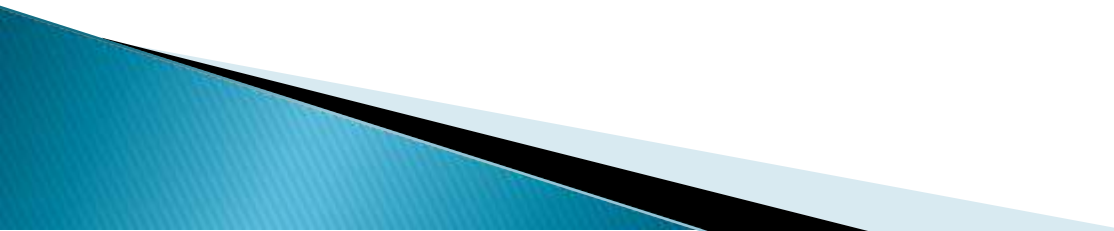
TO CREATE THE OPPORTUNITY



FIELDS AND RELATIONSHIPS

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

CREATION OF FIELDS

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

FIELDS IN VEHICLE OBJECT

- ▶ Click on the gear icon and then select Setup.
 - ▶ Click on the object manager tab just beside the home tab.
 - ▶ After the above steps, Select Vehicles Object
 - ▶ Now Select Fields and relationships from setup menu of the vehicle object.
 - ▶ Click Field Dependencies.
 - ▶ Click New.
 - ▶ Select Vehicle Type as the Controlling Field and select 2wheelers as the Dependent Field.
 - ▶ Click Continue.
 - ▶ Select the appropriate 2 wheelers Brands in each column by double-clicking them.
- Click Include Values.
 - Click Preview, then test the dependency by selecting different Vehicle Type and viewing the different Vehicles available for Vehicle Type.
 - Click Close to close the preview window.
 - Click Save.

2 WHEELERS :

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

INSTRUCTIONS

- Double click on a cell to toggle its visibility for the Controlling Field value shown in the column heading.
- To change multiple cells at once, select multiple cells and then click the Include Values or Exclude Values button to change the visibility of all selected cells at once.
- Use Shift+Click to select a range of adjacent cells. Use CTRL+Click to select multiple cells that are not adjacent.
- Use the Previous button to test the results.

Click button to include or exclude selected values from the dependent picklist.

Include Values Exclude Values

Vehicle Type:	2 WHEELERS	4 WHEELERS
	HERO	HERO
	HONDA	HONDA
	BAJAJ	BAJAJ
	ROYAL ENFIELD	ROYAL ENFIELD
	TVS	TVS
	KINETIC	KINETIC
	VEDA	VEDA
	JAIVA	JAIVA
	STD	STD
	BATTERY	BATTERY

Showing Columns: 1 - 2 (of 2) < Previous | Next > View All

Click button to include or exclude selected values from the dependent picklist.

Include Values Exclude Values

Save Cancel Preview

4

1

Fields Field Dependencies Set His

INDEXED

3

Controlling Field Vehicle Type
Dependent Field 2 WHEELERS

Click button to include or exclude selected values from the dependent picklist.

Include Values Exclude Values

Vehicle Type:	2 WHEELERS	4 WHEELERS
	RENAULT	RENAULT
	SKODA	SKODA
	HONDA	HONDA
	HYUNDAI	HYUNDAI
	SUZUKI	SUZUKI
	MAHINDRA	MAHINDRA
	VOLKSWAGEN	VOLKSWAGEN
	BENZ	BENZ
	AUDI	AUDI
	VOLVO	VOLVO

Showing Columns: 1 - 2 (of 2) < Previous | Next > View All

Click button to include or exclude selected values from the dependent picklist.

Include Values Exclude Values

Save Cancel Preview

6

5

Controlling Field Vehicle Type
Dependent Field 4WHEELERS

2

Vehicle Field Dependencies

Back to Custom Object: Vehicle

This page allows you to define dependencies between fields (e.g., dependent picklists).

Vehicle Field Dependencies - Salesforce - Developer Edition

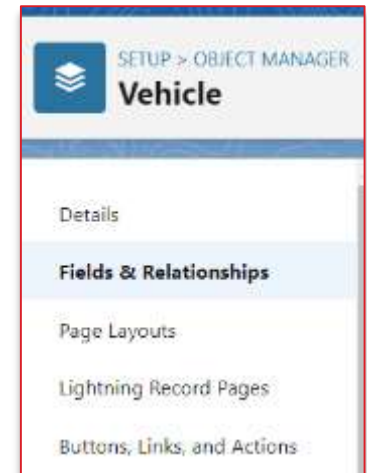
Field Dependencies

New

Fields In Driver Objects

Create a Lookup fields

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



EDIT Driver Custom Field
Vehicle

Custom Field Definition Edit Change Field Type Save Cancel

Field Information

Field Label:

Field Name:

Description:

Help Text:

Date Owner:

Fields & Relationships
16 Items, Sorted by Field Label

10 Items, Sorted by Field Label

FIELD	FIELD NAME	DATA TYPE	CONTROLLING FIELD
2 WHEELERS	2D_WHEELERS__c	Picklist	Vehicle Type
4WHEELERS	4WHEELERS__c	Picklist	Vehicle Type
Body Type	Body_Type__c	Text(20)	
Chassis No	Chassis_No__c	Text(30)	
Colour	Colour__c	Text(20)	
Condition	Condition__c	Picklist	
Created By	CreatedById	Lookup(User)	
Last Modified By	LastModifiedById	Lookup(User)	
Mileage	Mileage__c	Text(3)	
Owner	OwnerId	Lookup(Contact, User, or ...)	

Fields In Driver Objects

Fields & Relationships
7 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Created By	CreatedById	Lookup(User)
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Traveler Contact No	Traveler_Contact_No__c	Phone
Traveler Email	Traveler_Email__c	Email
Traveler Name	Traveler_Name__c	Text(3)
Traveler Name	Name	Text(50)

Fields & Relationships
9 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Created By	CreatedById	Lookup(User)
Driver Name	Driver_Name__c	Text(1)
Driver Name	Name	Text(50)
Fair Per Hour	Fair_Per_Hour__c	Text(30)
Last Modified By	LastModifiedById	Lookup(User)
License No	License_No__c	Text(30)
Mobile No	Mobile_No__c	Phone
Owner	OwnerId	Lookup(User,Group)
Vehicle	Vehicle__c	Lookup(Vehicle)

Fields In Opportunity Objects

Fields In Traveler Objects

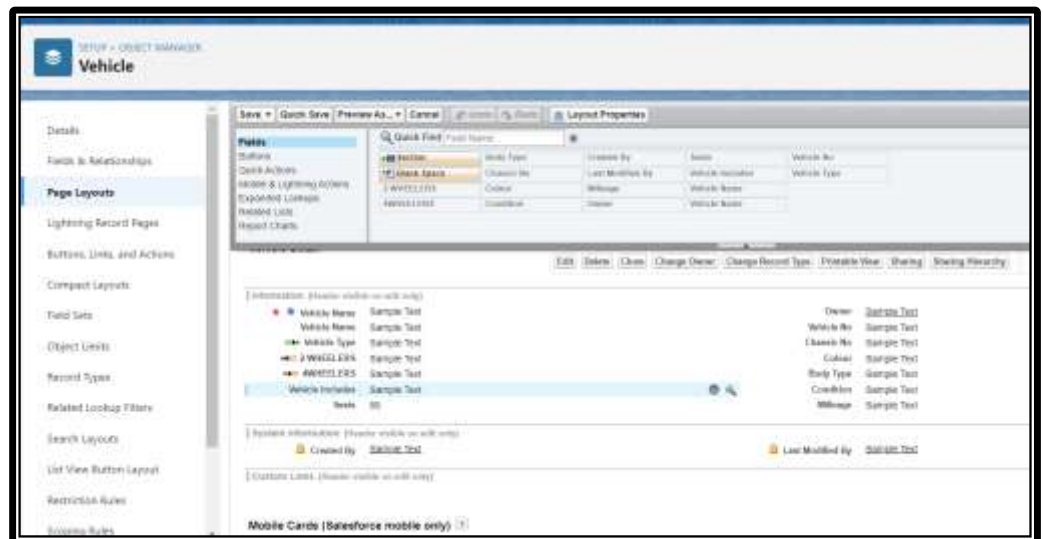
Fields & Relationships
31 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Account Name	AccountId	Lookup(Account)
Amount	Amount	Currency(16, 2)
Close Date	CloseDate	Date
Contract	ContractId	Lookup(Contract)
Created By	CreatedById	Lookup(User)
Current Generator(s)	CurrentGenerators__c	Text(100)
Delivery/Installation Status	DeliveryInstallationStatus__c	Picklist
Description	Description	Long Text Area(2000)
Expected Revenue	ExpectedRevenue	Currency(16, 2)
Forecast Category	ForecastCategoryName	Picklist
Journey End Date	Journey_End_Date__c	Date/Time

PAGE TLAYOU

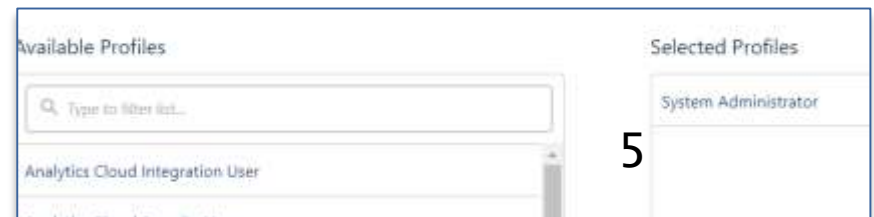
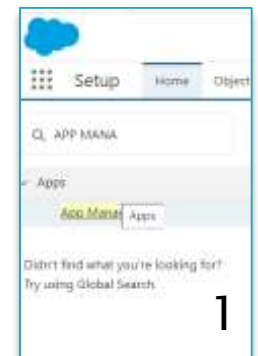
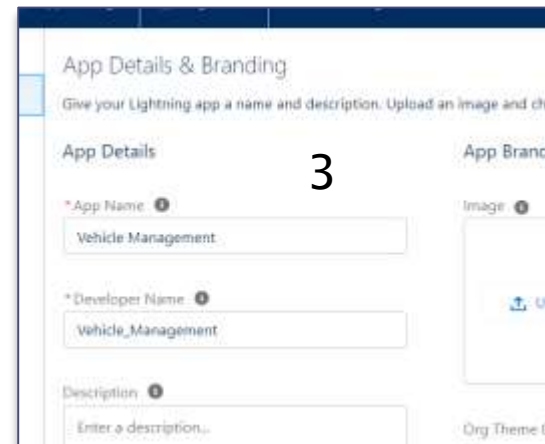
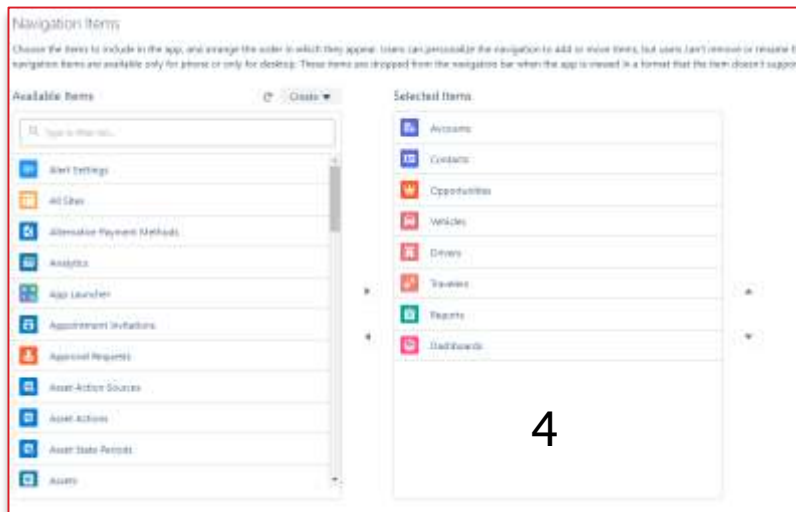
Organize Opportunity Layout

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

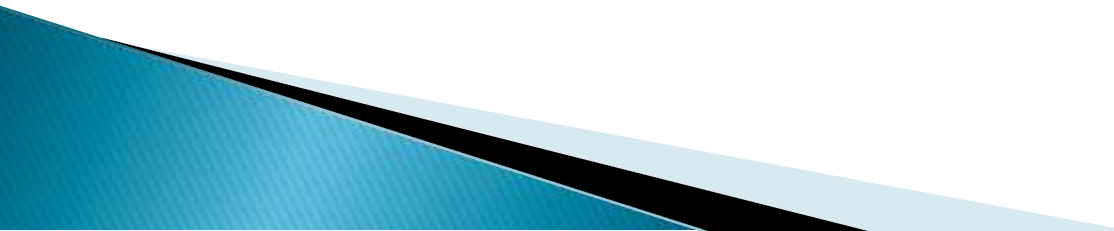


LIGHTNING APP

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



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

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

Creating a Profile

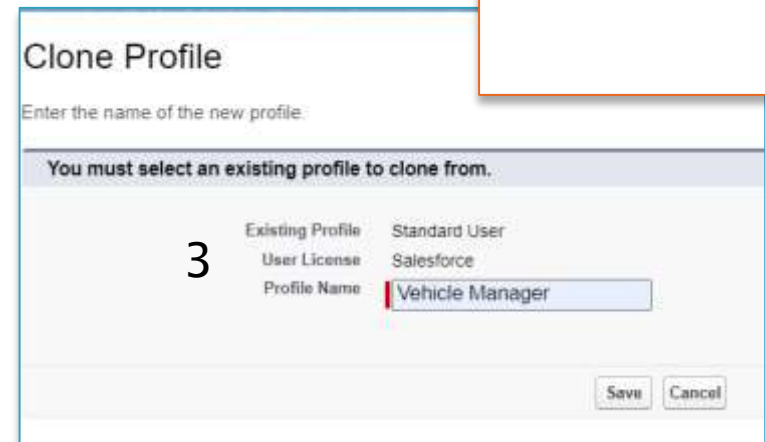
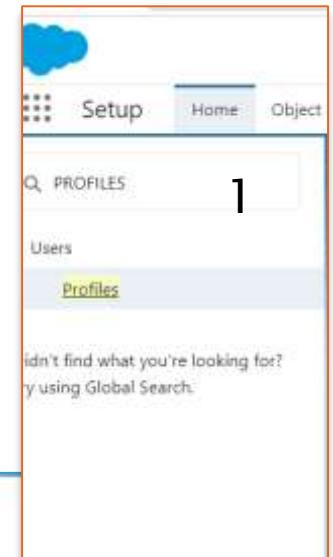
- ❖ Now create a Vehicle Manager profile and set it's object permissions.

Creating A Profile

- ▶ 1.From Setup enter Profiles in the Quick Find box, and select Profiles.
 - ▶ 2.From the list of profiles, find Standard User.
 - ▶ 3.Click Clone.
 - ▶ 4.For Profile Name, enter Vehicle Manager.
 - ▶ 5.Click Save.
 - ▶ 6.While still on the Vehicle Manager Profile page, then click Edit.
 - ▶ 7.Scroll down to Custom Object Permissions and give access for
 - ▶ Create, Read, Edit, and Delete, View all and modify all for Vehicle object Driver object and Traveler object.
- 

To create a new profile:

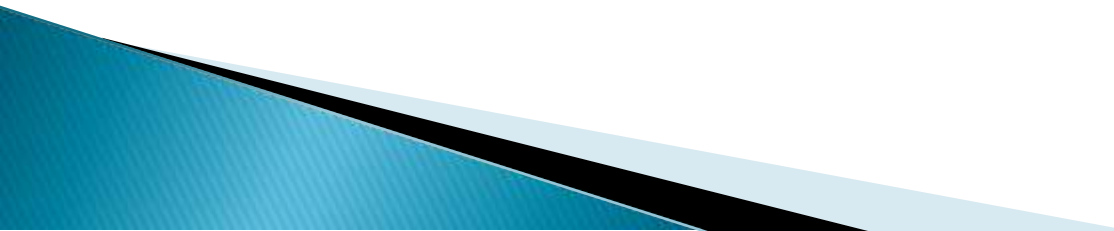
Go to setup -> type profiles in quick find box -> click on profiles -> clone the desired profile (standard user is preferable) -> enter profile name -> save

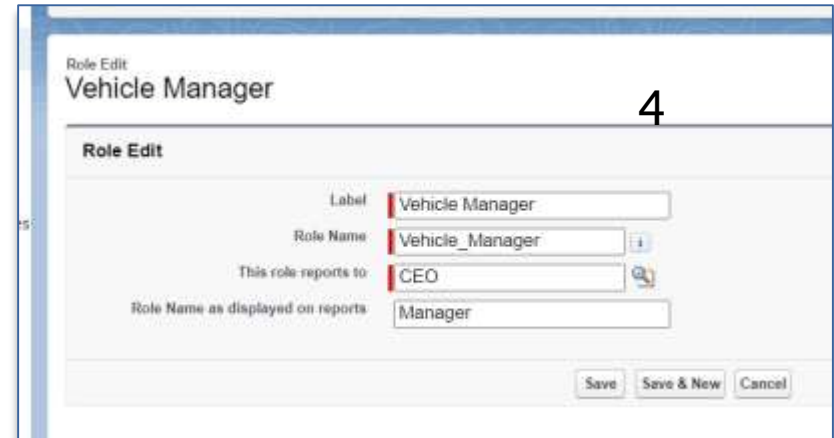
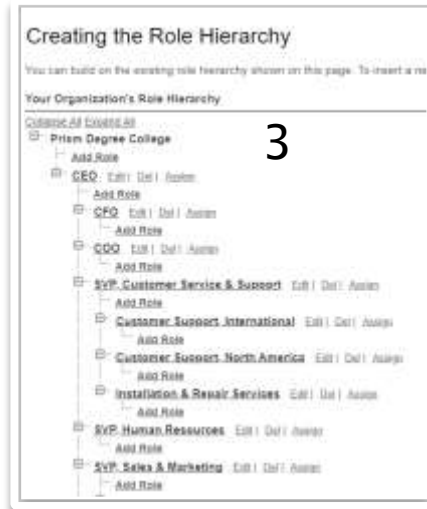
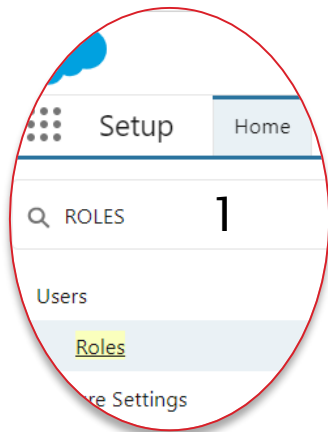


4

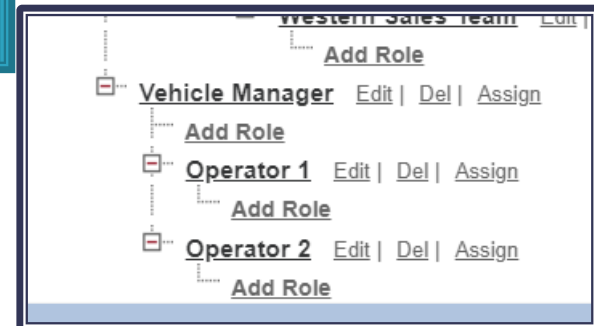
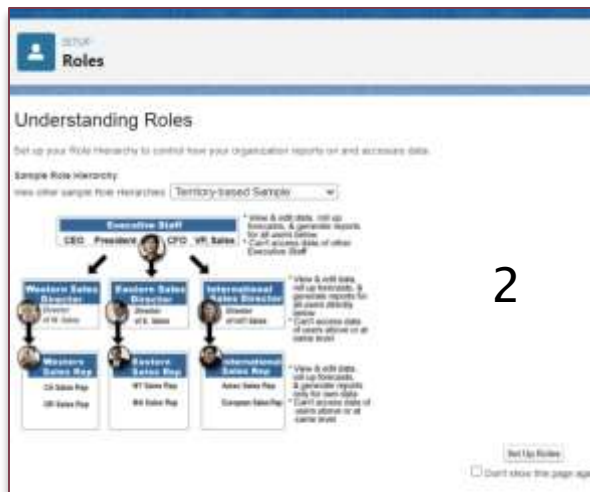


SET UP ROLES

- ▶ 1. Click on the Gear Icon
 - ▶ 2. Click "Setup"
 - ▶ 3. In the Quick Find box, enter "Roles"
 - ▶ 4. Click "Roles"
 - ▶ 5. Click on "Set Up Roles"
 - ▶ 6. Click "Expand All"
 - ▶ 7. Under the CEO, click on "Add Role"
 - ▶ 8. Fill up the Label as Vehicle Manager, Role Name Vehicle Manager.
 - ▶ 9. Enter a Role name that will be displayed on Reports
 - ▶ 10. Click on Save.
- 



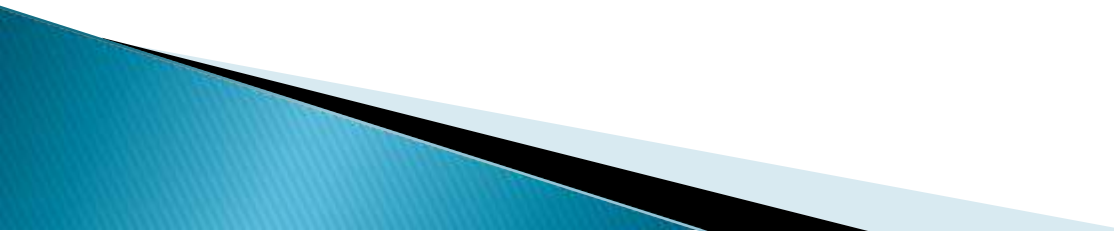
Similarly create Two Roles under Vehicle Manager as Operator 1 And Operator 2 Roles which will report to the Vehicle manager.



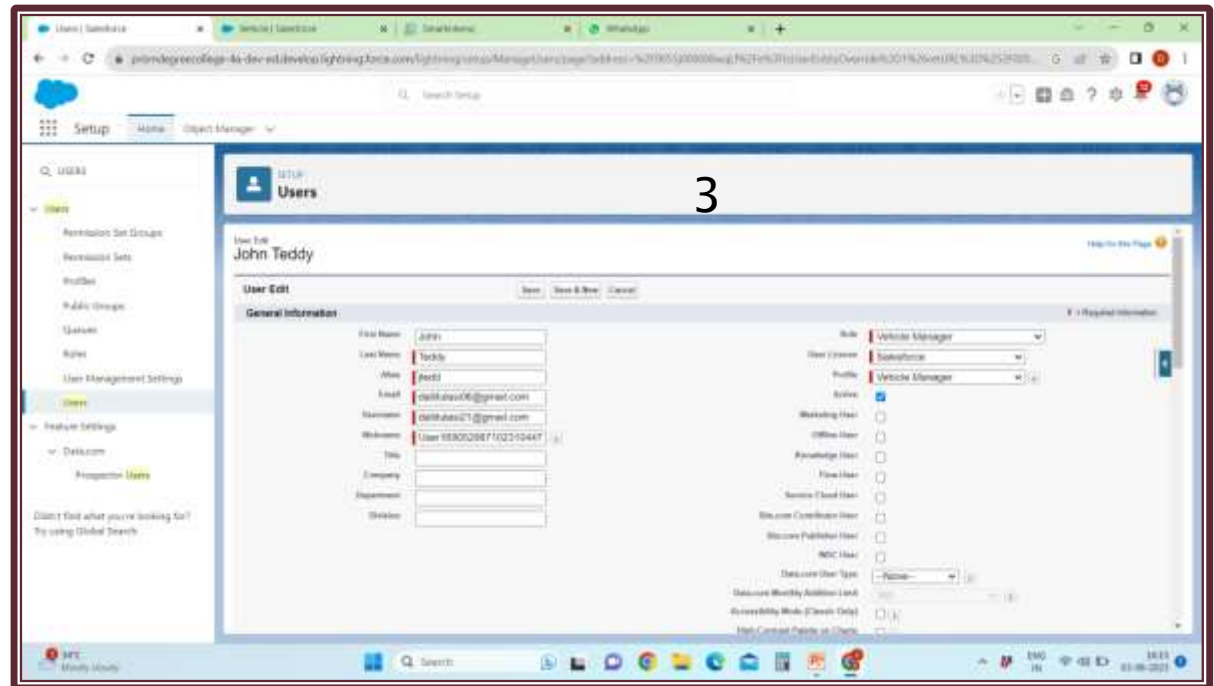
USERS

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

CREATING A USER

1. From Setup, in the Quick Find box, enter Users, and then select Users.
 2. Click New User.
 3. Enter the user's name John Teddy and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
 4. Select a Role(Vehicle Manager)
 5. Select a User License As salesforce.
 6. Select a profile as Vehicle Manager.
- 

CREATING A USER

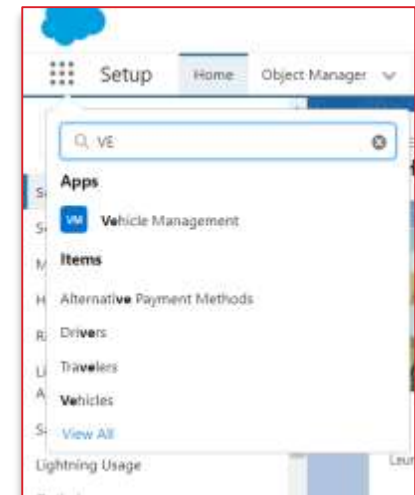
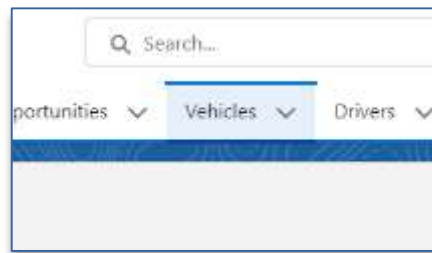


USER ADOPTION

- ▶ We need to understand user adoption and navigation.
- ▶ How to interact with database and their records.

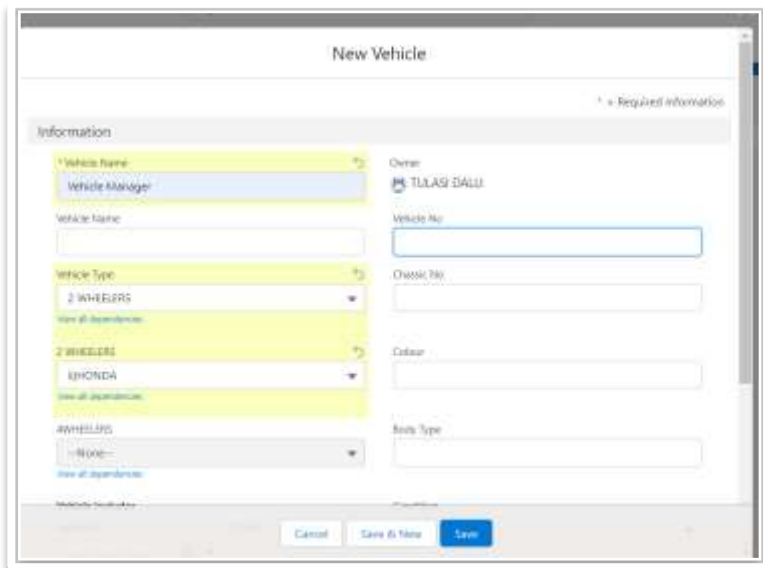
Create Vehicle Record

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



View Record (Vehicle)

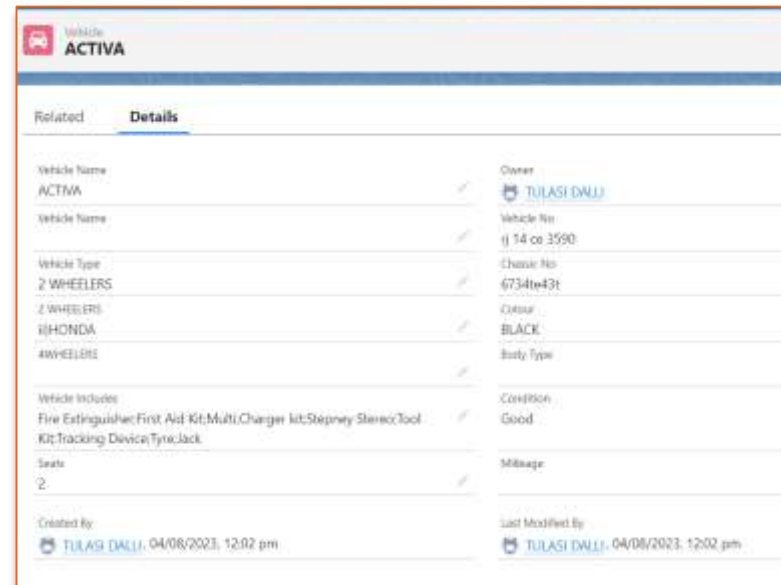
1. Click on App Launcher on left side of screen.
2. Search Vehicle Management System & click on it.
3. Click on Vehicle Tab.
4. Click on any record name. you can see the details of the Vehicle.



The screenshot shows a 'New Vehicle' form with the following fields and values:

Information	
Vehicle Name: Vehicle Manager	Owner: TULASI DALU
Vehicle Type: 2 WHEELERS	Vehicle No: [Empty]
Chassis No: [Empty]	Colour: [Empty]
Body Type: WHEELERS	Body Type: [Empty]

Buttons at the bottom: Cancel, Save & Close, Save.

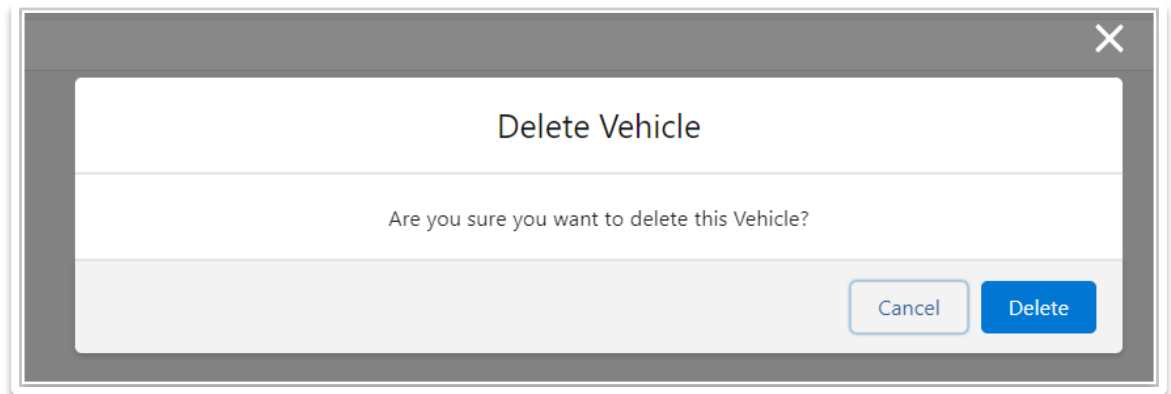
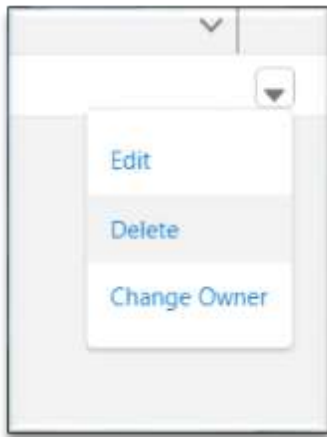


The screenshot shows the 'Vehicle Details' page for a vehicle named 'ACTIVA'. The details are as follows:

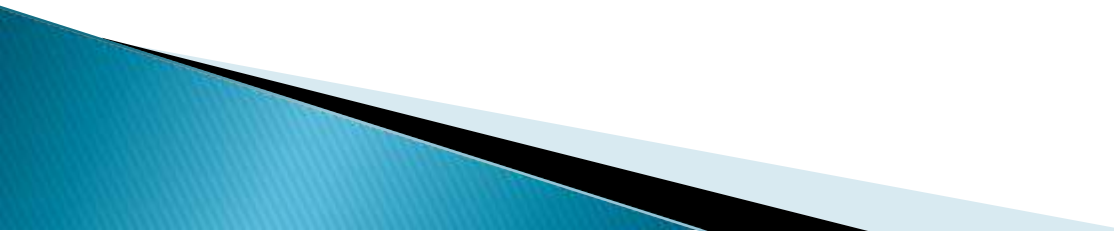
Related	Details
Vehicle Name	ACTIVA
Vehicle Type	2 WHEELERS
Chassis No	6734te43t
Colour	BLACK
Body Type	WHEELERS
Vehicle Includes	Fire Extinguisher, First Aid Kit, Multi-Charger kit, Stepney, Stereo, Tool Kit, Tracking Device, Tyre Jack
Seats	2
Created By	TULASI DALU, 04/08/2023, 12:02 pm
Last Modified By	TULASI DALU, 04/08/2023, 12:02 pm

Delete Record (Vehicle)

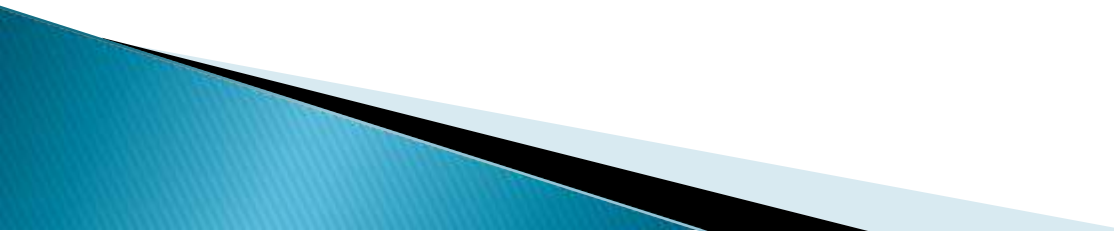
1. Click on App Launcher on left side of screen.
2. Search Vehicle Management System & click on it.
3. Click on Vehicle Tab.
4. Click on Arrow at right hand side on that Particular record.
5. Click delete and delete again.



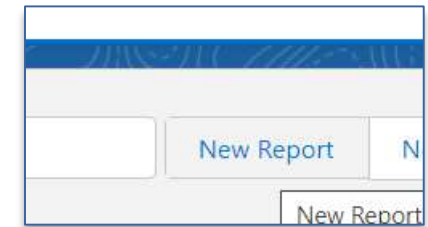
Report & Dashboards

- ▶ A report is a list of records that meet the criteria you define.
 - ▶ It's displayed in Salesforce in rows and columns, and can be filtered, grouped, or displayed in a graphical chart.
 - ▶ Every report is stored in a folder.
 - ▶ Folders can be public, hidden, or shared, and can be set to read-only or read/write.
- 

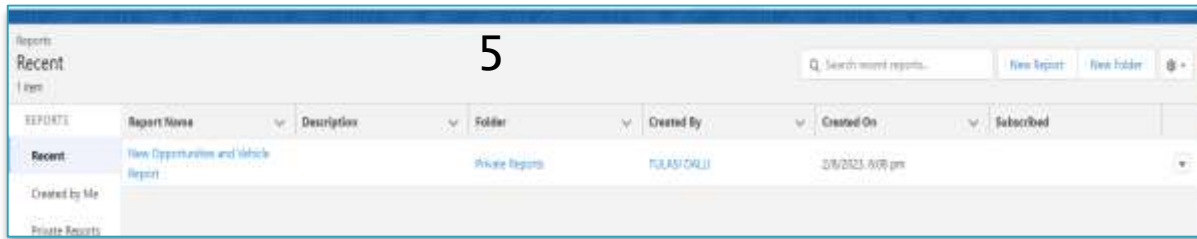
Create Report

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.
- 

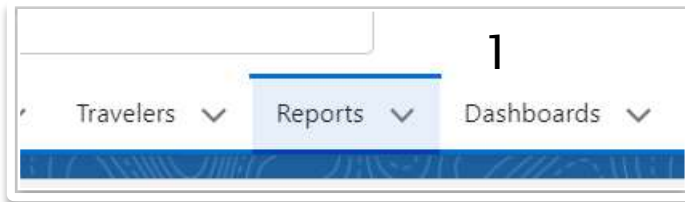
2



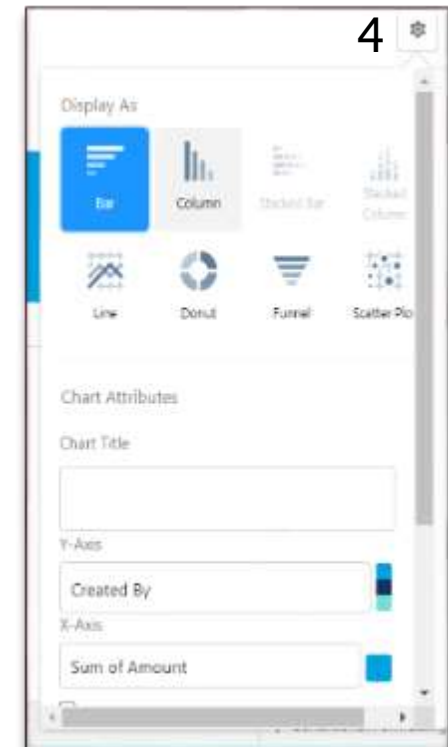
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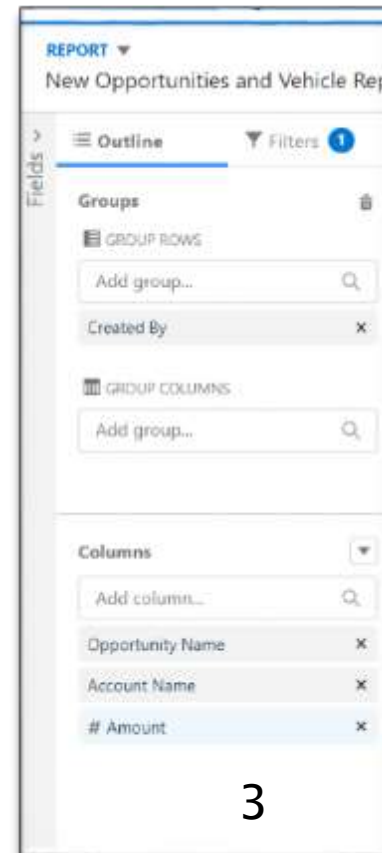
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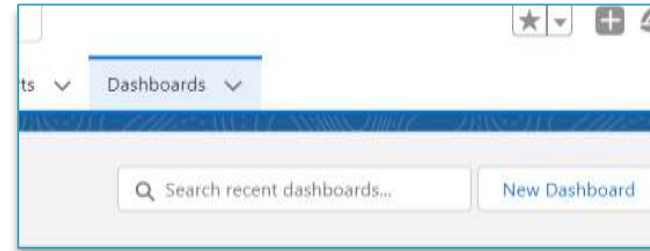
6

Previewing a limited number of records. Run the report to see everything.

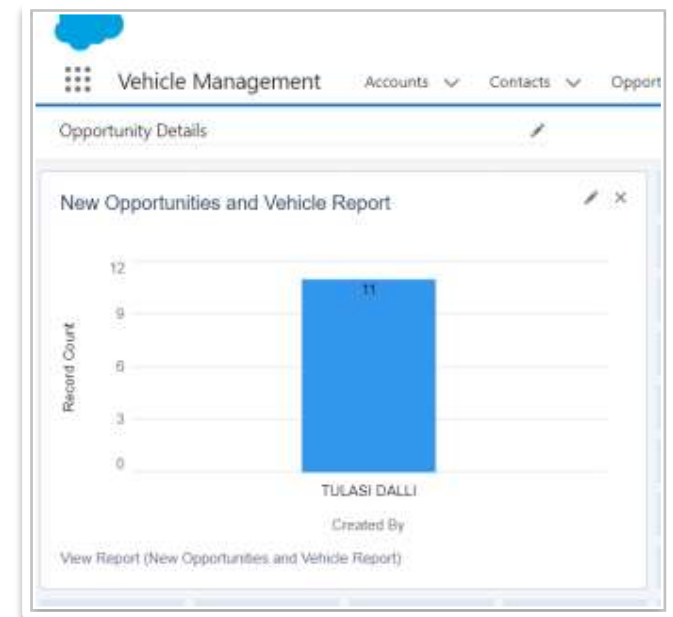
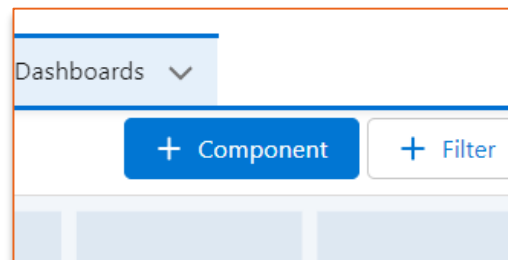
Created By ↑	Opportunity Name	Account Name	Amount ↑
	Grand Hotels Emergency Generators	Grand Hotels & Resorts Ltd	₹2,10,000.00
	Grand Hotels Guest Portable Generators	Grand Hotels & Resorts Ltd	₹2,50,000.00
	United Oil Refinery Generators	United Oil & Gas Corp.	₹2,70,000.00
	Grand Hotels Generator Installations	Grand Hotels & Resorts Ltd	₹3,50,000.00
	United Oil Refinery Generators	United Oil & Gas Corp.	₹9,15,000.00
Subtotal			₹24,35,000.00
Total (11)			₹24,35,000.00

Create Dashboard

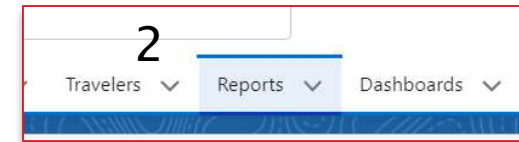
1. Click the Dashboards tab.
2. Click New Dashboard.
3. Name the dashboard Opportunity Details and click Create.
4. Click +Component.
5. Select the Opportunity Details and click Select.
6. Select the Vertical Bar Chart component and click Add.
7. Click Save and then Done.



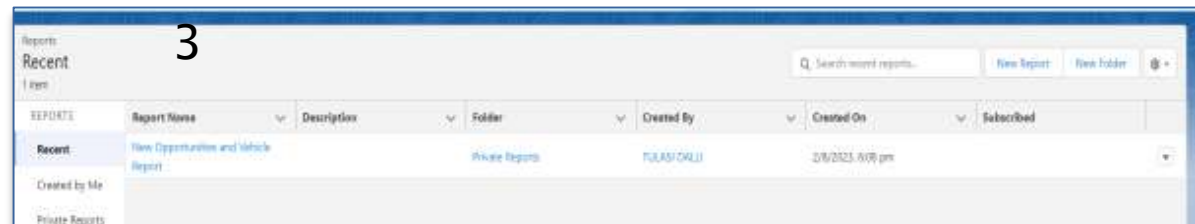
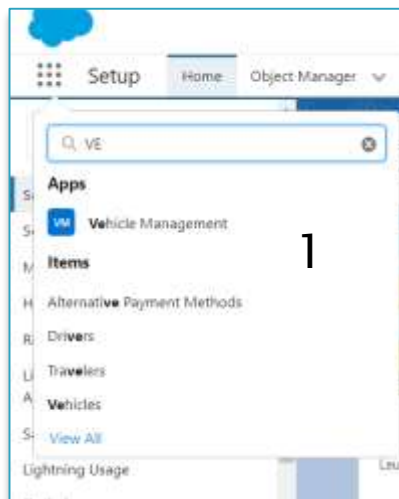
DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Opportunity Details		Private Dashboards	TULASI DALLI	2/10/2023, 6:13 pm	
Created by Me						
Private Dashboards						



REPORT



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



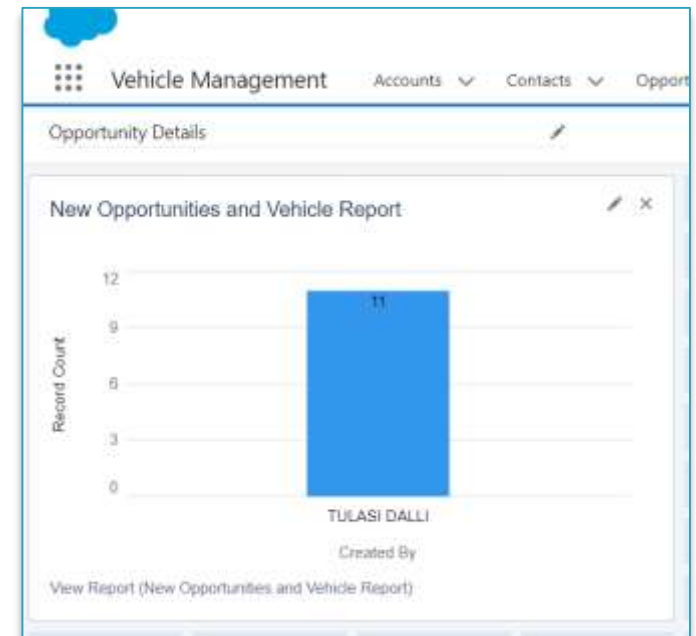
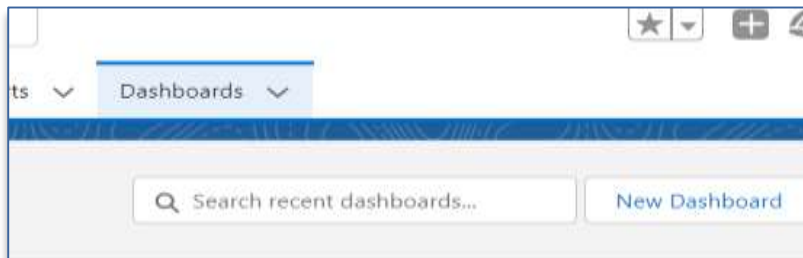
4

Previewing a limited number of records. Run the report to see everything.

Created By	Opportunity Name	Account Name	Amount
	Grand Hotels Emergency Generators	Grand Hotels & Resorts Ltd	₹2,10,000.00
	Grand Hotels Guest Portable Generators	Grand Hotels & Resorts Ltd	₹2,50,000.00
	United Oil Refinery Generators	United Oil & Gas Corp.	₹2,70,000.00
	Grand Hotels Generator Installations	Grand Hotels & Resorts Ltd	₹3,50,000.00
	United Oil Refinery Generators	United Oil & Gas Corp.	₹9,15,000.00
Subtotal			₹24,35,000.00
Total (11)			₹24,35,000.00

DASHBOARD

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



THANK YOU

D. TULASI
B. SPANDANA
B. GAYATHRI
N. TARUNI

