

# Project Report On

## Vehicle Management System Using Salesforce

### **1. Creating a developer org in salesforce.**

- ❖ Go to [developers.salesforce.com/](https://developers.salesforce.com/)
- ❖ Click on sign up.
- ❖ On the sign up form, enter the following details :
- ❖ First name & Last name - KARIMUNNISA & C
- ❖ Email - ckarimunnisa@gmail.com
- ❖ Role : Developer
- ❖ Company : College Name - GAYATRI DEGREE COLLEGE
- ❖ County : India
- ❖ Postal Code : pin code - 517501
- ❖ Username : ckarimunnisa@gdctirupati.com

### **2. Create Objects**

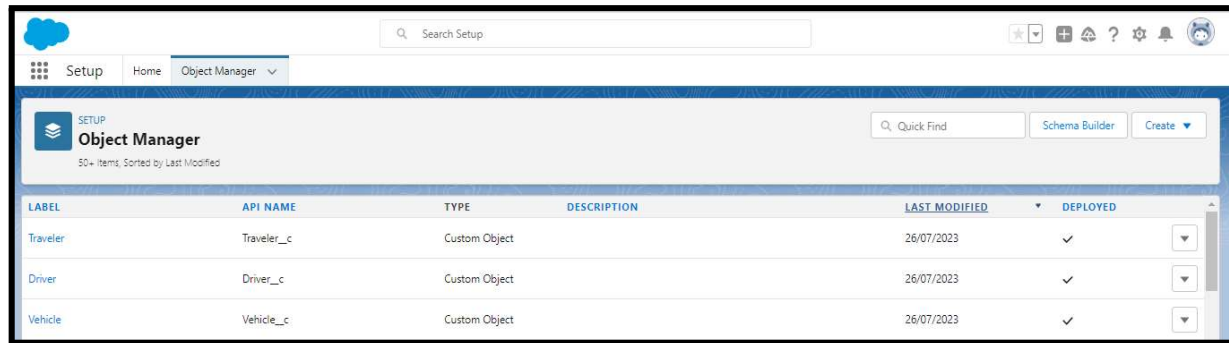
Salesforce objects are database tables that permit you to store data that is specific to an organization. Salesforce objects are of two types: Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

**Standard Objects** : Account, Contact, Opportunity.

**Custom objects** : Vehicle, Driver, Traveler.

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

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

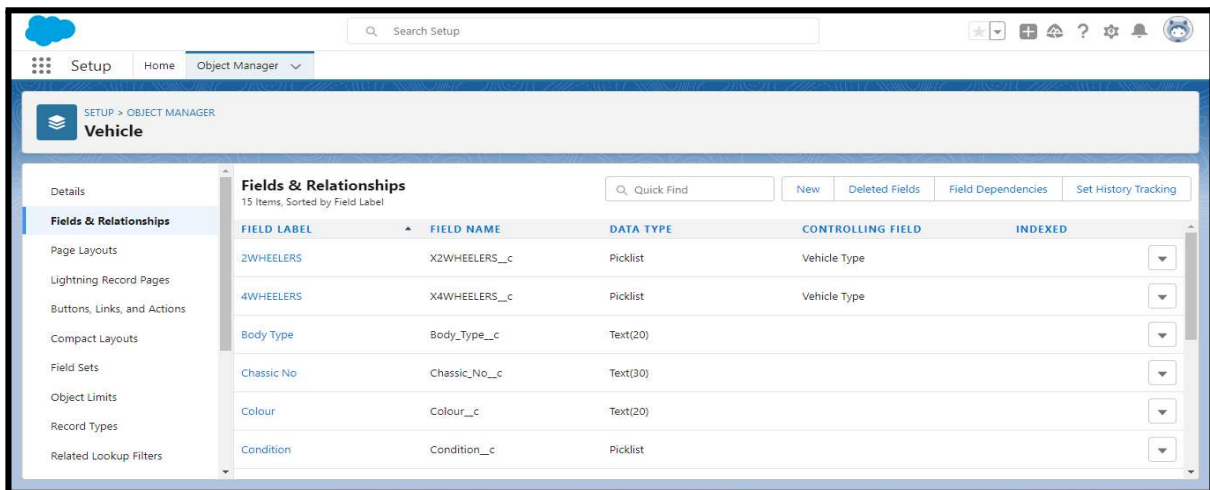


| LABEL    | API NAME    | TYPE          | DESCRIPTION | LAST MODIFIED | DEPLOYED |
|----------|-------------|---------------|-------------|---------------|----------|
| Traveler | Traveler__c | Custom Object |             | 26/07/2023    | ✓        |
| Driver   | Driver__c   | Custom Object |             | 26/07/2023    | ✓        |
| Vehicle  | Vehicle__c  | Custom Object |             | 26/07/2023    | ✓        |

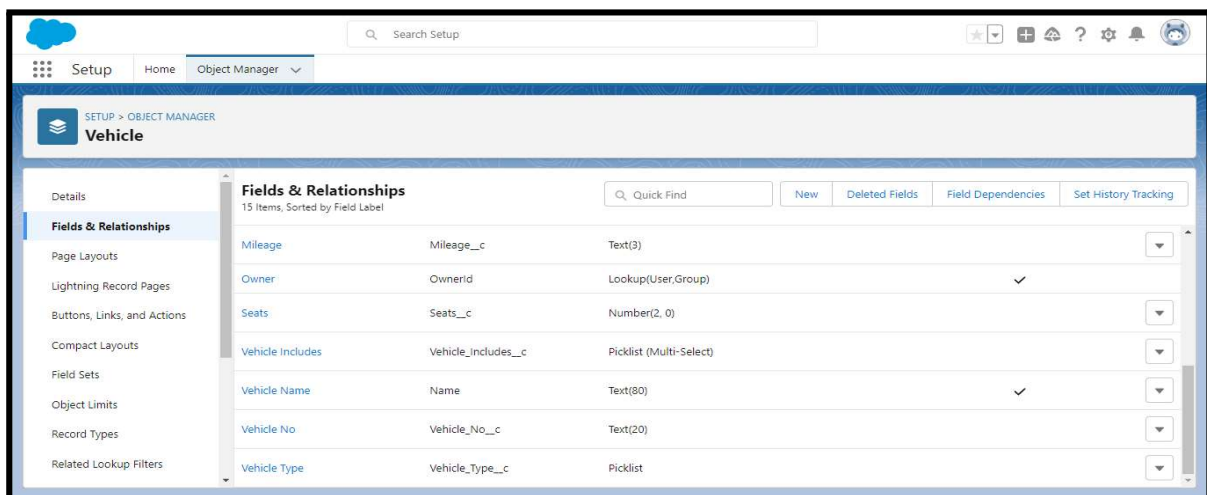
### 3. Fields and Relationship

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

□ Creation of Fields :



| FIELD LABEL | FIELD NAME    | DATA TYPE | CONTROLLING FIELD | INDEXED |
|-------------|---------------|-----------|-------------------|---------|
| 2WHEELERS   | X2WHEELERS__c | Picklist  | Vehicle Type      |         |
| 4WHEELERS   | X4WHEELERS__c | Picklist  | Vehicle Type      |         |
| Body Type   | Body_Type__c  | Text(20)  |                   |         |
| Chassic No  | Chassic_No__c | Text(30)  |                   |         |
| Colour      | Colour__c     | Text(20)  |                   |         |
| Condition   | Condition__c  | Picklist  |                   |         |



| FIELD LABEL      | FIELD NAME          | DATA TYPE               | CONTROLLING FIELD | INDEXED |
|------------------|---------------------|-------------------------|-------------------|---------|
| Mileage          | Mileage__c          | Text(3)                 |                   |         |
| Owner            | Ownerid             | Lookup(User,Group)      |                   | ✓       |
| Seats            | Seats__c            | Number(2, 0)            |                   |         |
| Vehicle Includes | Vehicle_Includes__c | Picklist (Multi-Select) |                   |         |
| Vehicle Name     | Name                | Text(80)                |                   | ✓       |
| Vehicle No       | Vehicle_No__c       | Text(20)                |                   |         |
| Vehicle Type     | Vehicle_Type__c     | Picklist                |                   |         |

## Fields in Vehicle Object :

The screenshot shows the 'Vehicle Field Dependencies' page in Salesforce Setup. The page title is 'Vehicle Field Dependencies' with a link to 'Back to Custom Object: Vehicle'. Below the title, a message states: 'This page allows you to define dependencies between fields (e.g., dependent picklists)'. A table titled 'Field Dependencies' lists two dependencies:

| Action                                     | Controlling Field | Dependent Field | Modified By                        |
|--|-------------------|-----------------|------------------------------------|
| <a href="#">Edit</a>   <a href="#">Del</a> | Vehicle Type      | 2WHEELERS       | KARIMUNNISA C, 26/07/2023, 6:56 pm |
| <a href="#">Edit</a>   <a href="#">Del</a> | Vehicle Type      | 4WHEELERS       | KARIMUNNISA C, 26/07/2023, 6:59 pm |

## Fields In Driver Objects :

The screenshot shows the 'Driver Fields & Relationships' page in Salesforce Setup. The page title is 'Driver' with a link to 'Setup > OBJECT MANAGER'. Below the title, a message states: '8 Items, Sorted by Field Label'. A table lists the fields and their relationships:

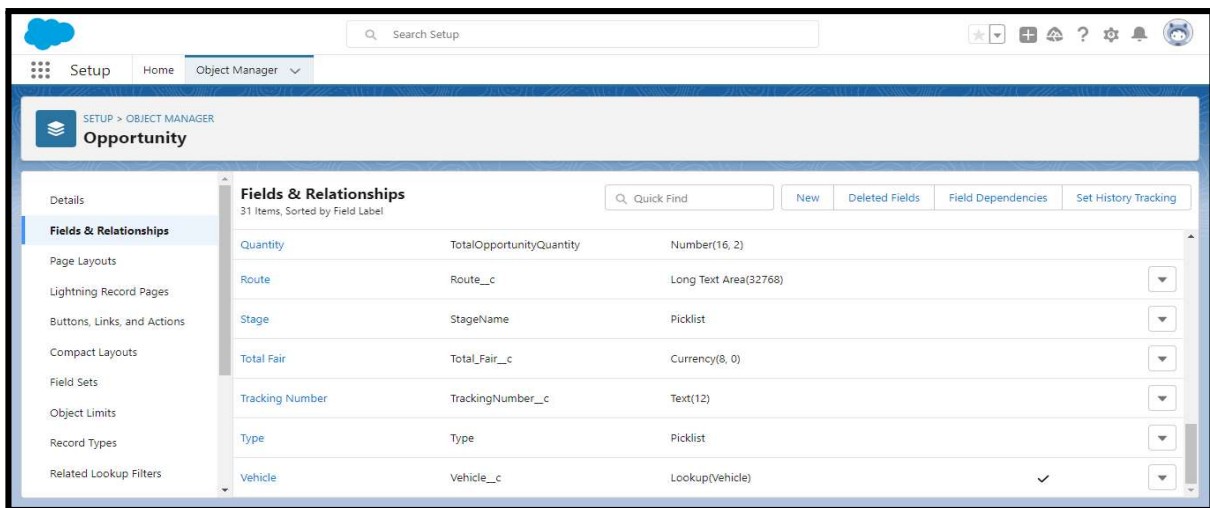
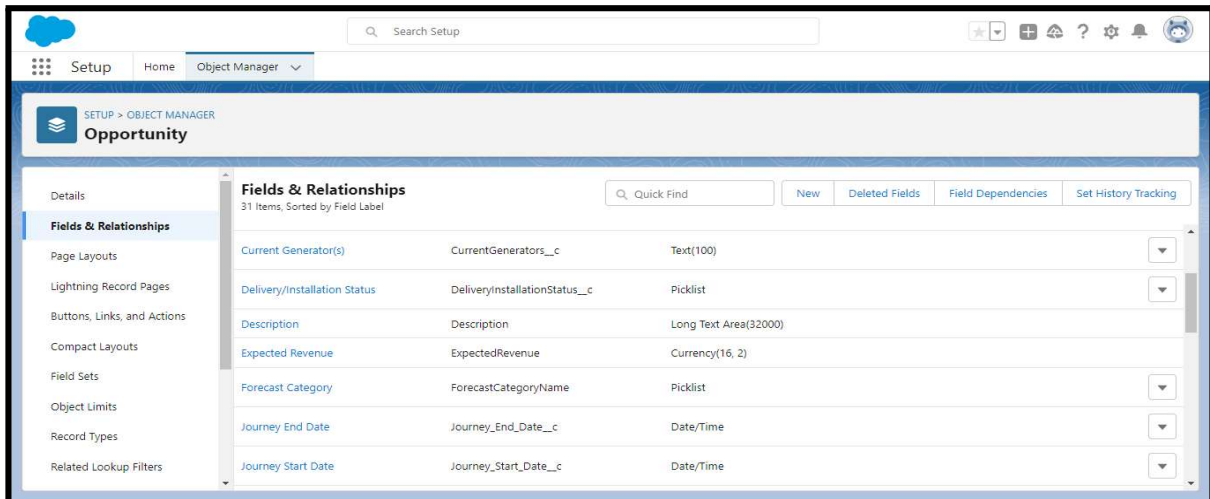
| Field Label      | Field Name       | Data Type          | Controlling Field | Indexed |
|------------------|------------------|--------------------|-------------------|---------|
| Driver Name      | Name             | Text(80)           |                   |         |
| Fair Per Hour    | Fair_Per_Hour__c | Text(10)           |                   |         |
| Last Modified By | LastModifiedById | Lookup(User)       |                   |         |
| License No       | License_No__c    | Text(30)           |                   |         |
| Mobile No        | Mobile_No__c     | Phone              |                   |         |
| Owner            | Ownerid          | Lookup(User,Group) |                   |         |
| Vehicle          | Vehicle__c       | Lookup(Vehicle)    |                   |         |

## Fields In Traveler Objects :

The screenshot shows the 'Traveler Fields & Relationships' page in Salesforce Setup. The page title is 'Traveler' with a link to 'Setup > OBJECT MANAGER'. Below the title, a message states: '6 Items, Sorted by Field Label'. A table lists the fields and their relationships:

| Field Label         | Field Name             | Data Type          | Controlling Field | Indexed |
|---------------------|------------------------|--------------------|-------------------|---------|
| Created By          | CreatedBy              | 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       | Name                   | Text(80)           |                   |         |

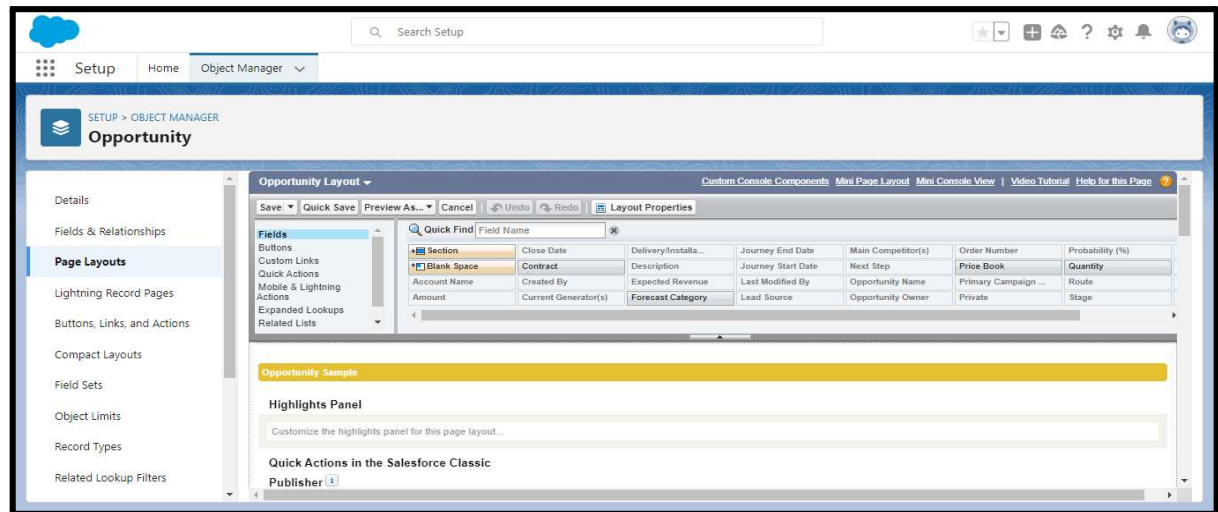
## □ Fields In Opportunity Objects :



## 4. **Page Layout Setup**

### □ Organize Opportunity Layout :

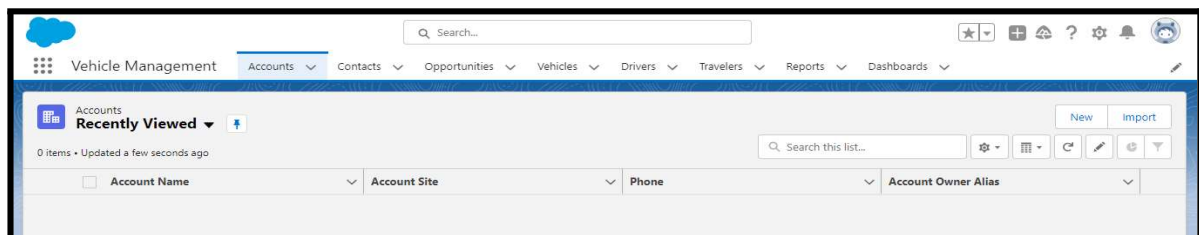
- ❖ Click on the gear icon and then select Setup.
- ❖ Click on the object manager tab just beside the home tab.
- ❖ Search in quick find (Opportunity) & select Opportunity.
- ❖ Click on page layout and you can add or remove fields by drag & drop



## 5. Lightning App

□ Create The Vehicle Management App :

- ❖ From Setup, enter App Manager in the Quick Find and select App Manager.
- ❖ Click New Lightning App. Enter Vehicle Management as the App Name, then click Next
- ❖ Under App Options, leave the default selections and click Next.
- ❖ Under Utility Items, leave as is and click Next.
- ❖ From Available Items, select Accounts, Contacts, Opportunities, Vehicle, Driver, Travelers, Reports, and Dashboards and move them to Selected Items. Click Next.
- ❖ From Available Profiles, select System Administrator and move it to Selected Profiles. Click Save & Finish.
- ❖ To verify your changes, click the App Launcher, type Vehicle Management and select the Vehicle Management app.



## 6. Profile

□ Creating A Profile :

- ❖ Now create a Vehicle Manager profile and set its object permissions.
- ❖ From Setup enter Profiles in the Quick Find box, and select Profiles.
- ❖ From the list of profiles, find Standard User.
- ❖ Click Clone.
- ❖ For Profile Name, enter Vehicle Manager.
- ❖ Click Save.
- ❖ While still on the Vehicle Manager Profile page, then click Edit.
- ❖ Scroll down to Custom Object Permissions and give access for
- ❖ Create, Read, Edit, and Delete, View all and modify all for Vehicle object Driver object and Traveler object.

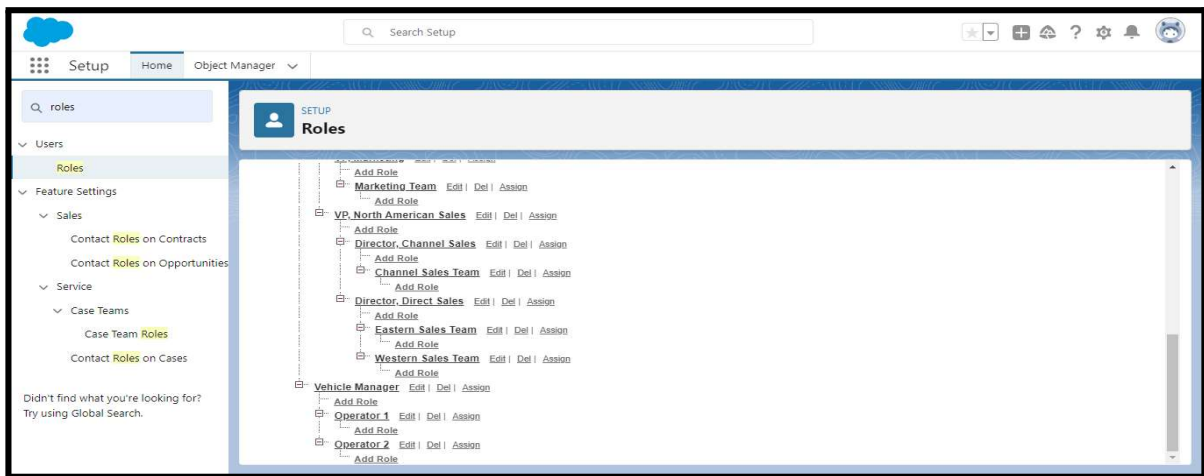
The screenshot shows the Salesforce Setup interface for the 'Vehicle Manager' profile. The left sidebar contains a search bar with 'prof' entered, and a list of items including 'Users' and 'Profiles'. The main content area is titled 'Profiles' and shows the 'Vehicle Manager' profile details. The profile is a 'Custom Profile' with a checkmark. The 'Profile Detail' section includes fields for Name, User License, Description, Created By, and Modified By. The 'Page Layouts' section shows the 'Standard Object Layouts' for the profile, including 'Global', 'Object Milestone', and 'Operating Hours'.

| Profile Detail |                 |                     |                                    |
|----------------|-----------------|---------------------|------------------------------------|
| Name           | Vehicle Manager |                     |                                    |
| User License   | Salesforce      | Custom Profile      | ✓                                  |
| Description    |                 |                     |                                    |
| Created By     | KARIMUNNISA.C.  | 26/07/2023, 8:02 pm | Modified By                        |
|                |                 |                     | KARIMUNNISA.C. 26/07/2023, 8:05 pm |

| Page Layouts            |              |                                   |   |
|-------------------------|--------------|-----------------------------------|---|
| Standard Object Layouts | Global       | Global Layout [ View Assignment ] | Object Milestone                            |
|                         |              |                                   | Object Milestone Layout [ View Assignment ] |
| Email Application       | Not Assigned | Operating Hours                   | Operating Hours Layout                      |

## □ setup Roles :

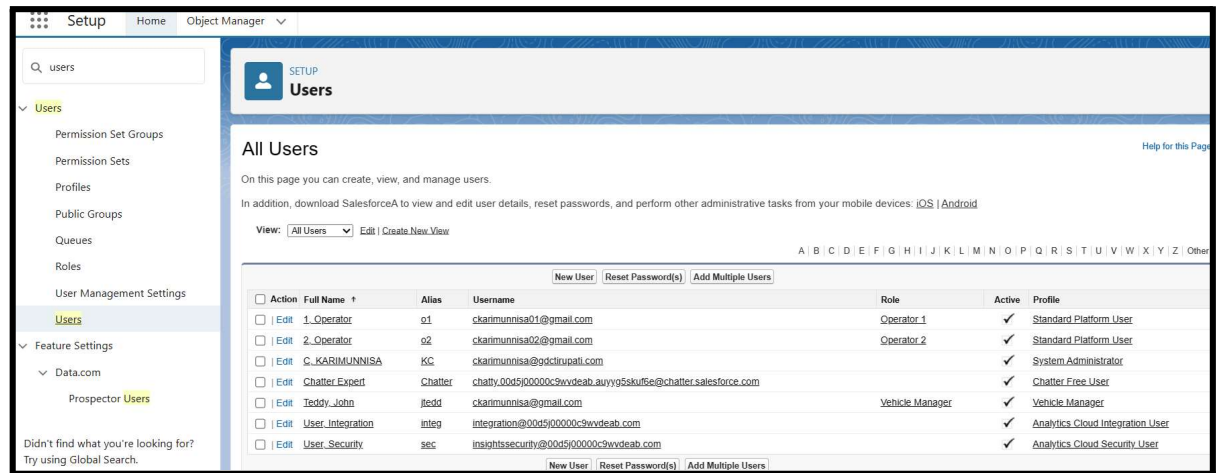
- ❖ Click on the Gear Icon
- ❖ Click "Setup"
- ❖ In the Quick Find box, enter "Roles"
- ❖ Click "Roles"
- ❖ Click on "Set Up Roles"
- ❖ Click "Expand All"
- ❖ Under the CEO, click on "Add Role"
- ❖ Fill up the Label as Vehicle Manager, Role Name Vehicle Manager.
- ❖ Enter a Role name that will be displayed on Reports
- ❖ Click on Save.



## 7. Users

### □ Creating A User :

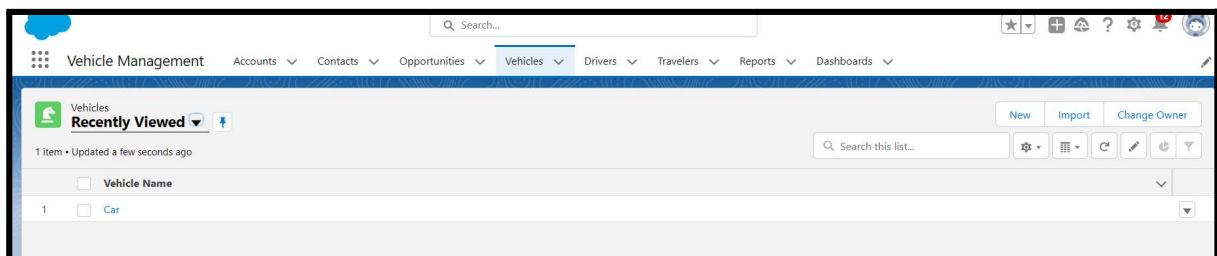
- ❖ From Setup, in the Quick Find box, enter Users, and then select Users.
- ❖ Click New User.
- ❖ Enter the user's name John Teddy and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
- ❖ Select a Role(Vehicle Manager)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



## 8. User Adoption

### □ Create Vehicle Record :

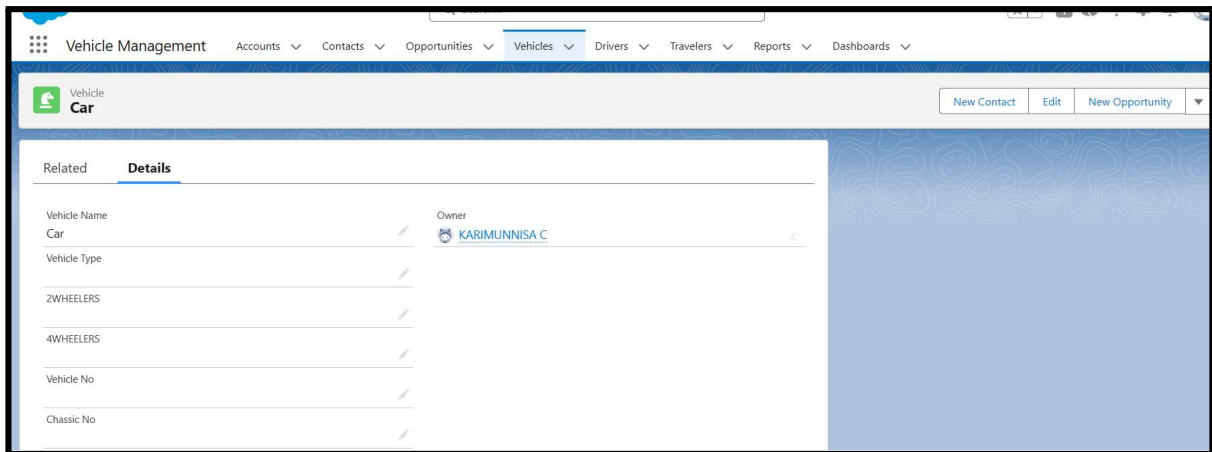
- ❖ Click on App Launcher on left side of screen.
- ❖ Search Vehicle Management System & click on it.
- ❖ Click on Vehicle tab.
- ❖ Click new button
- ❖ Fill all Vehicle record details.
- ❖ Click on Save Button



### □ View Record (Vehicle) :

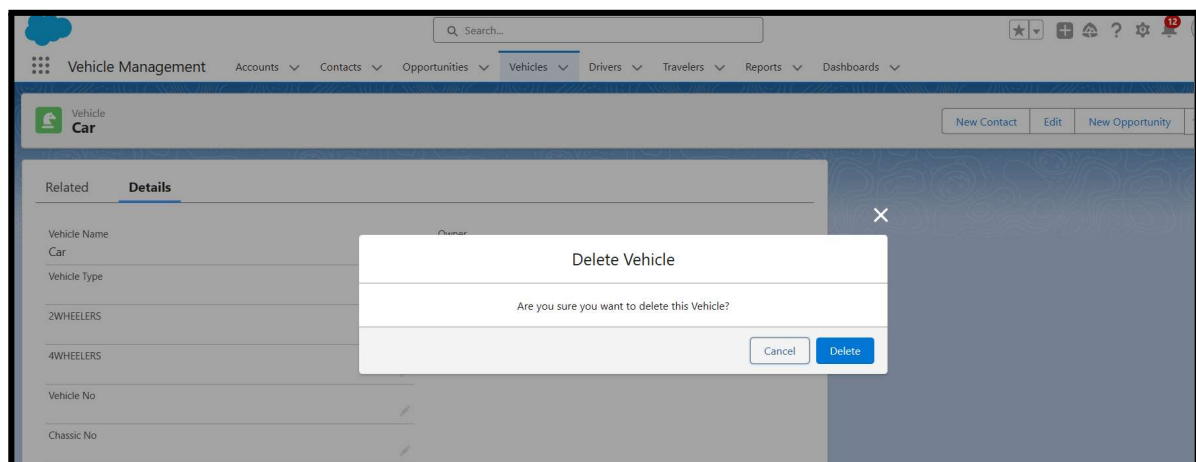
- ❖ Click on App Launcher on left side of screen.
- ❖ Search Vehicle Management System & click on it.
- ❖ Click on Vehicle Tab.
- ❖ Click on any record name. you can see the details of the Vehicle





#### □ Delete Record (Vehicle) :

- ❖ Click on App Launcher on left side of screen.
- ❖ Search Vehicle Management System & click on it.
- ❖ Click on Vehicle Tab.
- ❖ Click on Arrow at right hand side on that Particular record.
- ❖ Click delete and delete again.



## **9. Report & Dashboards**

#### □ Create Report :

- ❖ Go to Reports and click New Report.
- ❖ Select the Opportunity and Customer Name report type and click Start Report.
- ❖ To begin filtering, click Filters.
- ❖ Click the Show Me standard filter and select All Opportunity. Click Apply.
- ❖ Click on add columns add Opportunity: Opportunity name, Account Name,

Amount, Traveler name etc.

- ❖ Reports needs to be Grouped by one field.(ex - Created by) (require to enable add chart)
- ❖ Click Save.
- ❖ Save your report as Opportunity Details and accept the auto-generated unique name.

Reports

Recent

1 item

Q Search recent reports...

New Report

New Folder

| REPORTS         | Report Name         | Description | Folder          | Created By    | Created On         | Subscribed |  |
|-----------------|---------------------|-------------|-----------------|---------------|--------------------|------------|--|
| Recent          | Opportunity Details |             | Private Reports | KARIMUNNISA C | 31/7/2023, 8:23 pm |            |  |
| Created by Me   |                     |             |                 |               |                    |            |  |
| Private Reports |                     |             |                 |               |                    |            |  |
| Public Reports  |                     |             |                 |               |                    |            |  |

□ Create Dashboard :

- ❖ Click the Dashboards tab.
- ❖ Click New Dashboard.
- ❖ Name the dashboard Opportunity Details and click Create.
- ❖ Click +Component.
- ❖ Select the Opportunity Details and click Select.
- ❖ Select the Vertical Bar Chart component and click Add.
- ❖ Click Save and then Done.

Dashboards

Recent


1 item


Q

Search recent dashboards...

New Dashboard

New Folder



| DASHBOARDS         | Dashboard Name      | Description | Folder             | Created By    | Created On         | Subscribed |   |
|--------------------|---------------------|-------------|--------------------|---------------|--------------------|------------|---|
| Recent             | Opportunity Details |             | Private Dashboards | KARIMUNNISA C | 31/7/2023, 8:07 pm |            |  |
| Created by Me      |                     |             |                    |               |                    |            |   |
| Private Dashboards |                     |             |                    |               |                    |            |   |
| All Dashboards     |                     |             |                    |               |                    |            |   |
| FOLDERS            |                     |             |                    |               |                    |            |   |

## 10. **Reporting**

□ 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

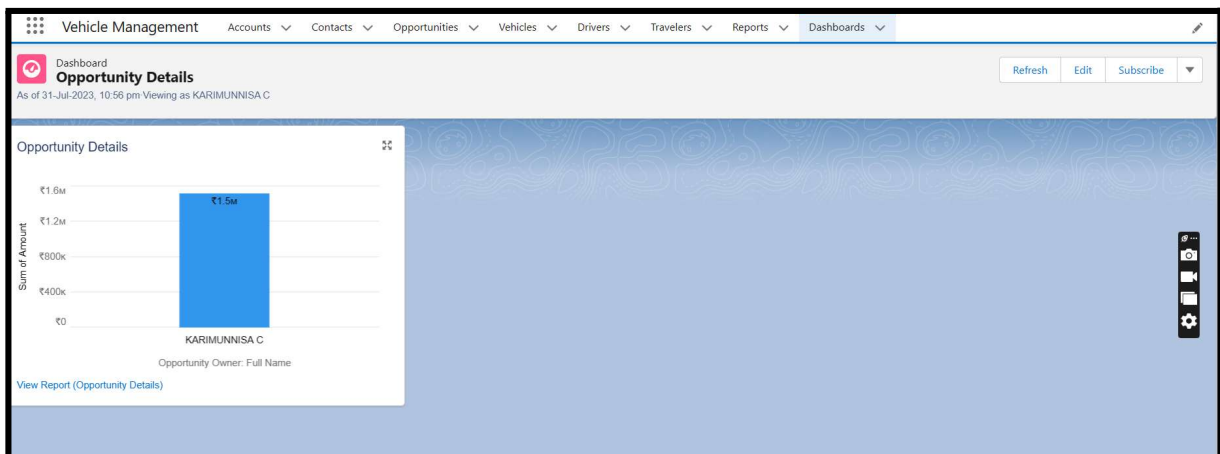
Report: Opportunity and Customer Name  
**Opportunity Details**

Enable Field Editing

| Opportunity        | Opportunity Owner: Full Name | Opportunity Name                       | Account Name: Account Name | Amount       | Journey Start Date | Journey End Date | Created By: Full Name | Opportunity ID  | Route |
|--------------------|------------------------------|--|----------------------------|--------------|--------------------|------------------|-----------------------|-----------------|-------|
| KARIMUNNISA C (10) |                              | GenePoint Lab Generators               | GenePoint                  | ₹60,000.00   | -                  | -                | KARIMUNNISA C         | 0065j00001.fwTT | -     |
|                    |                              | GenePoint SLA                          | GenePoint                  | ₹30,000.00   | -                  | -                | KARIMUNNISA C         | 0065j00001.fwTU | -     |
|                    |                              | Edge Emergency Generator               | Edge Communications        | ₹75,000.00   | -                  | -                | KARIMUNNISA C         | 0065j00001.fwT8 | -     |
|                    |                              | Edge Emergency Generator               | Edge Communications        | ₹35,000.00   | -                  | -                | KARIMUNNISA C         | 0065j00001.fwTR | -     |
|                    |                              | Grand Hotels Emergency Generators      | Grand Hotels & Resorts Ltd | ₹2,10,000.00 | -                  | -                | KARIMUNNISA C         | 0065j00001.fwTP | -     |
|                    |                              | Grand Hotels Generator Installations   | Grand Hotels & Resorts Ltd | ₹3,50,000.00 | -                  | -                | KARIMUNNISA C         | 0065j00001.fwTG | -     |
|                    |                              | Grand Hotels Guest Portable Generators | Grand Hotels & Resorts Ltd | ₹2,50,000.00 | -                  | -                | KARIMUNNISA C         | 0065j00001.fwT7 | -     |
|                    |                              | United Oil Refinery Generators         | United Oil & Gas Corp.     | ₹2,70,000.00 | -                  | -                | KARIMUNNISA C         | 0065j00001.fwT4 | -     |
|                    |                              | United Oil SLA                         | United Oil & Gas Corp.     | ₹1,20,000.00 | -                  | -                | KARIMUNNISA C         | 0065j00001.fwT1 | -     |
|                    |                              | United Oil Generator Generators        | United Oil & Gas Corp.     | ₹1,20,000.00 | -                  | -                | KARIMUNNISA C         | 0065j00001.fwT5 | -     |

## 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



\*\*\* THE END \*\*\*