

Project Report On Vehicle Management System Using Salesforce

1. Creating a developer org in salesforce.

- ❖ Go to developers.salesforce.com/
- ❖ Click on sign up.
- ❖ On the sign up form, enter the following details :
- ❖ First name & Last name – FAZILATH & VELLORE
- ❖ Email – vellorefazilath@gmail.com
- ❖ Role : Developer
- ❖ Company : College Name - GAYATRI DEGREE COLLEGE – TIRUPATI
- ❖ County : India
- ❖ Postal Code : pin code - 517501
- ❖ Username : vellore@fazilath.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.

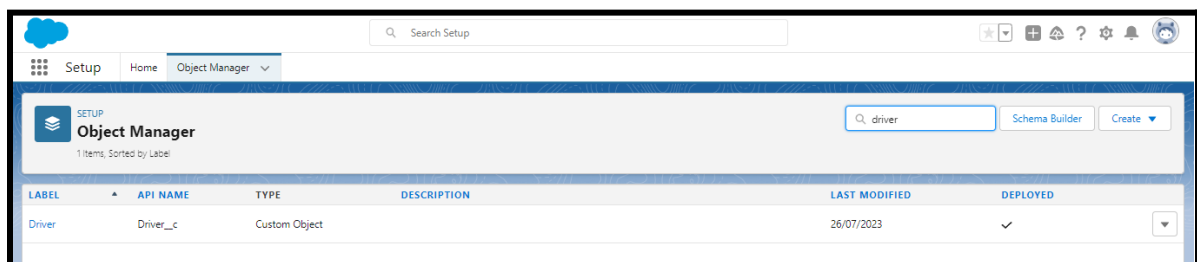
→ Vehicle :



The screenshot shows the Salesforce Object Manager interface. At the top, there's a search bar with 'vehicle' entered. Below the search bar, there's a table with one row for the 'Vehicle' object. The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The 'Vehicle' object is listed with API NAME 'Vehicle_c', TYPE 'Custom Object', and LAST MODIFIED '26/07/2023'. The DEPLOYED status is marked with a checkmark.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Vehicle	Vehicle_c	Custom Object		26/07/2023	✓

→ Driver :



The screenshot shows the Salesforce Object Manager interface. At the top, there's a search bar with 'driver' entered. Below the search bar, there's a table with one row for the 'Driver' object. The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The 'Driver' object is listed with API NAME 'Driver_c', TYPE 'Custom Object', and LAST MODIFIED '26/07/2023'. The DEPLOYED status is marked with a checkmark.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Driver	Driver_c	Custom Object		26/07/2023	✓

→ Traveler :



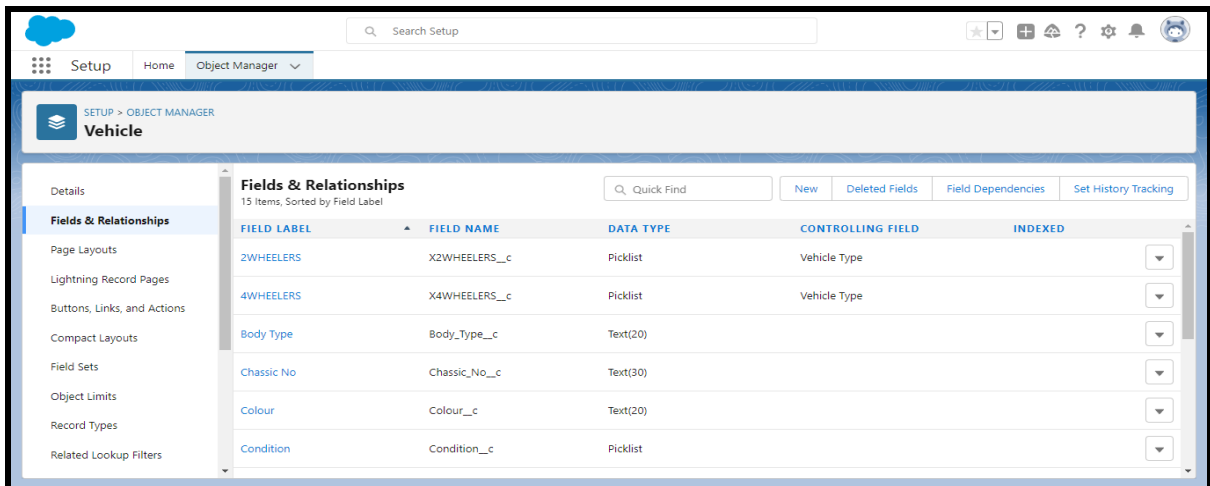
The screenshot shows the Salesforce Object Manager interface. At the top, there's a search bar with 'Search Setup'. Below it, the 'Object Manager' section is active, showing a search for 'traveler'. A table lists the object 'Traveler' with API Name 'Traveler__c', Type 'Custom Object', Last Modified '26/07/2023', and Deployed status '✓'.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Traveler	Traveler__c	Custom Object		26/07/2023	✓

3. Fields and Relationship

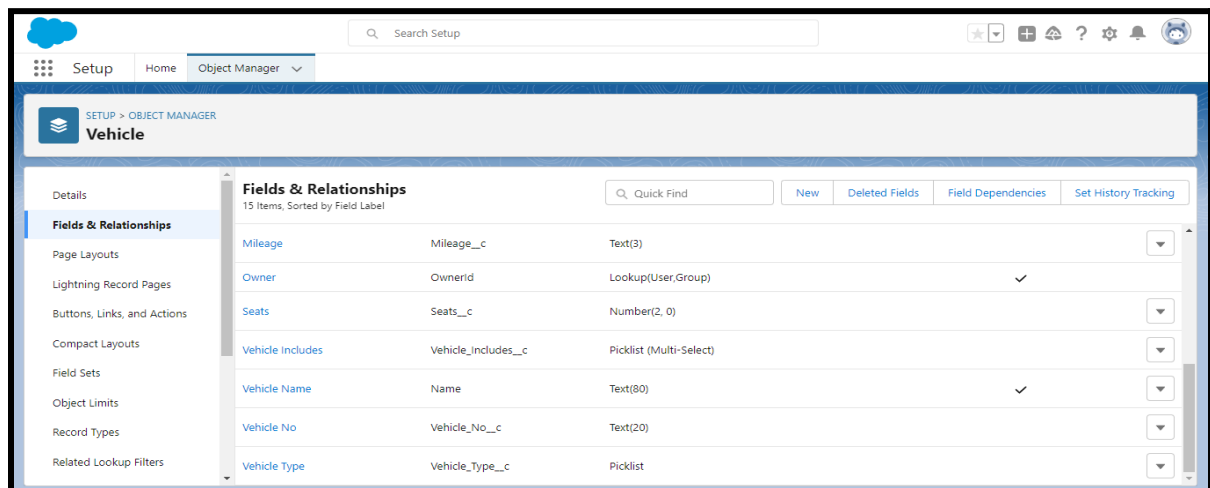
An object relationship in Salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

→ Creation of Fields :



The screenshot shows the 'Fields & Relationships' section for the 'Vehicle' object. It lists 15 items, sorted by Field Label. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status.

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		



This screenshot continues the 'Fields & Relationships' section for the 'Vehicle' object, showing the remaining items in the list.

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 Salesforce Setup interface for the 'Vehicle' object. The left sidebar contains navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Vehicle Field Dependencies' and includes a 'Back to Custom Object: Vehicle' link. 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 dependencies for the 'Vehicle Type' field.

Action	Controlling Field	Dependent Field	Modified By
Edit Del	Vehicle Type	2WHEELERS	SUSHMITHA.PASUPULETI.RAGHUPATHI, 26/07/2023, 6:55 pm
Edit Del	Vehicle Type	4WHEELERS	SUSHMITHA.PASUPULETI.RAGHUPATHI, 26/07/2023, 6:59 pm

→ Fields In Driver Objects :

The screenshot shows the Salesforce Setup interface for the 'Driver' object. The left sidebar contains navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Fields & Relationships' and includes a 'Quick Find' search bar and buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. Below the title, a message states: '8 Items, Sorted by Field Label'. A table lists the fields for the 'Driver' object.

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 Salesforce Setup interface for the 'Traveler' object. The left sidebar contains navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Fields & Relationships' and includes a 'Quick Find' search bar and buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. Below the title, a message states: '6 Items, Sorted by Field Label'. A table lists the fields for the 'Traveler' object.

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 :

Fields & Relationships
31 Items, Sorted by Field Label

Field Name	Field Label	Field Type
Current Generator(s)	CurrentGenerators__c	Text(100)
Delivery/Installation Status	DeliveryInstallationStatus__c	Picklist
Description	Description	Long Text Area(32000)
Expected Revenue	ExpectedRevenue	Currency(16, 2)
Forecast Category	ForecastCategoryName	Picklist
Journey End Date	Journey_End_Date__c	Date/Time
Journey Start Date	Journey_Start_Date__c	Date/Time

Fields & Relationships
31 Items, Sorted by Field Label

Field Name	Field Label	Field Type
Quantity	TotalOpportunityQuantity	Number(16, 2)
Route	Route__c	Long Text Area(32768)
Stage	StageName	Picklist
Total Fair	Total_Fair__c	Currency(8, 0)
Tracking Number	TrackingNumber__c	Text(12)
Type	Type	Picklist
Vehicle	Vehicle__c	Lookup(Vehicle)

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

Opportunity Layout

Field Name	Field Label	Field Type
Close Date	Close Date	Date
Contract	Contract	Picklist
Description	Description	Long Text Area(32000)
Journey End Date	Journey End Date	Date/Time
Journey Start Date	Journey Start Date	Date/Time
Main Competitor(s)	Main Competitor(s)	Text
Next Step	Next Step	Picklist
Opportunity Name	Opportunity Name	Text
Opportunity Owner	Opportunity Owner	Picklist
Price Book	Price Book	Picklist
Primary Campaign	Primary Campaign	Picklist
Route	Route	Picklist
Stage	Stage	Picklist

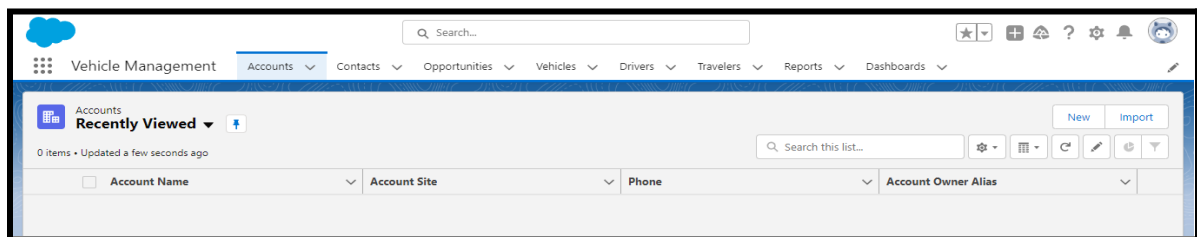
Highlights Panel
Customize the highlights panel for this page layout...

Quick Actions in the Salesforce Classic
Publisher

5. Lightning App

→ Create The Vehicle Management App :

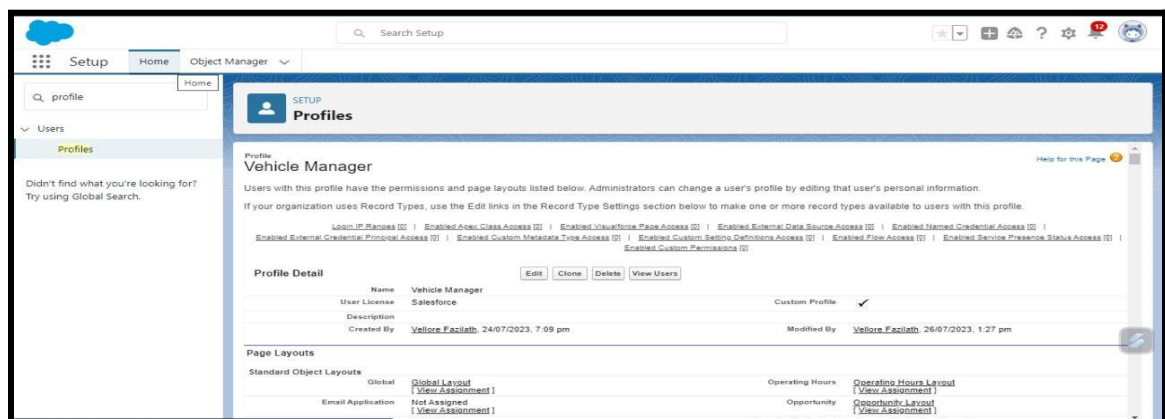
- ❖ From Setup, enter App Manager in the Quick Find and select App Manager.
- ❖ Click New Lightning App. Enter Vehicle Management as the App Name, then click Next
- ❖ Under App Options, leave the default selections and click Next.
- ❖ Under Utility Items, leave as is and click Next.
- ❖ From Available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

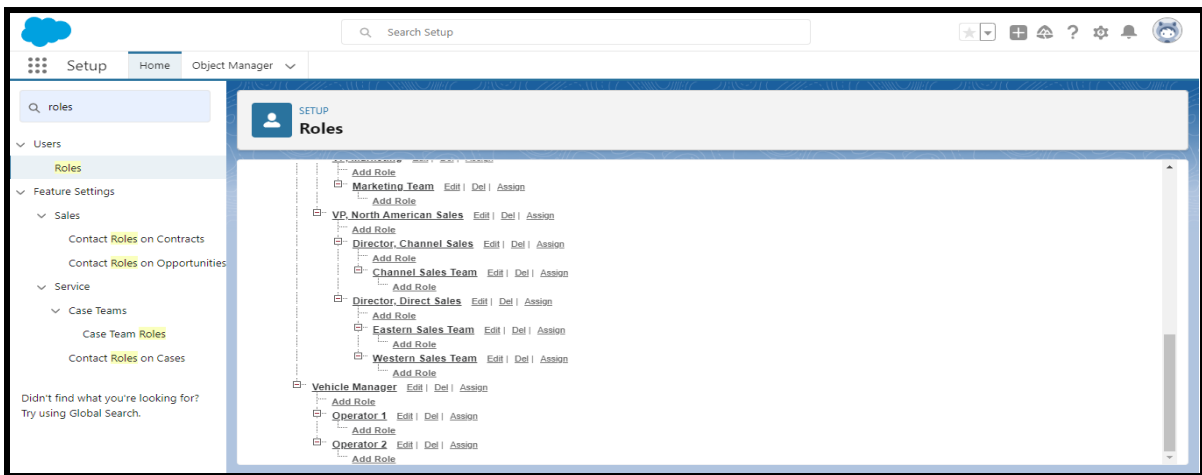
→ Creating A Profile :

- ❖ 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.



→ Setup Roles :

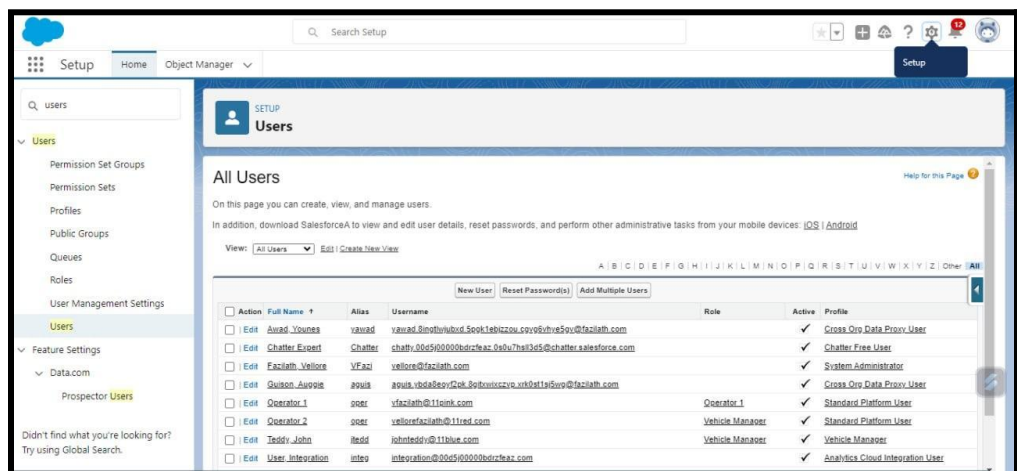
- ❖ Click on the Gear Icon
- ❖ Click "Setup"
- ❖ In the Quick Find box, enter "Roles"
- ❖ Click "Roles"
- ❖ Click on "Set Up Roles"
- ❖ Click "Expand All"
- ❖ Under the CEO, click on "Add Role"
- ❖ Fill up the Label as Vehicle Manager, Role Name Vehicle Manager.
- ❖ Enter a Role name that will be displayed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



7. Users

→ Creating A User :

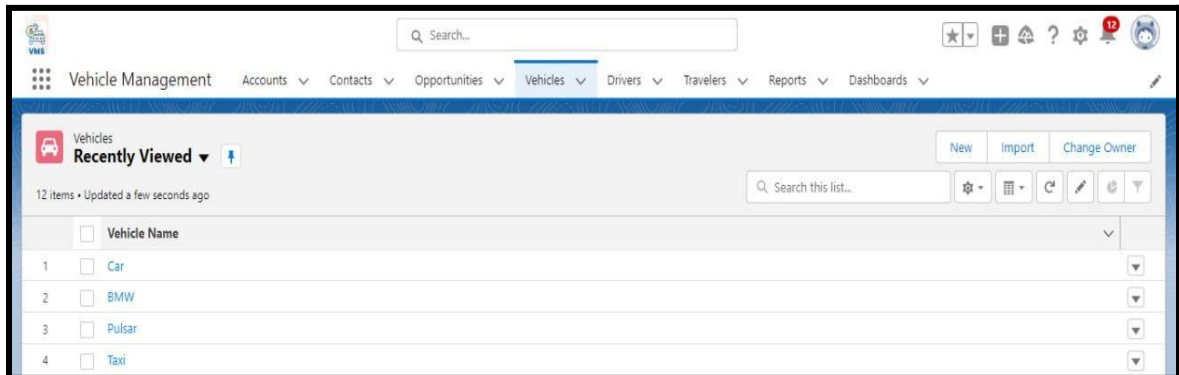
- ❖ From Setup, in the Quick Find box, enter Users, and then select Users.
- ❖ Click New User.
- ❖ Enter the user's name John Teddy and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
- ❖ Select a Role(Vehicle Manager)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



8. User Adoption

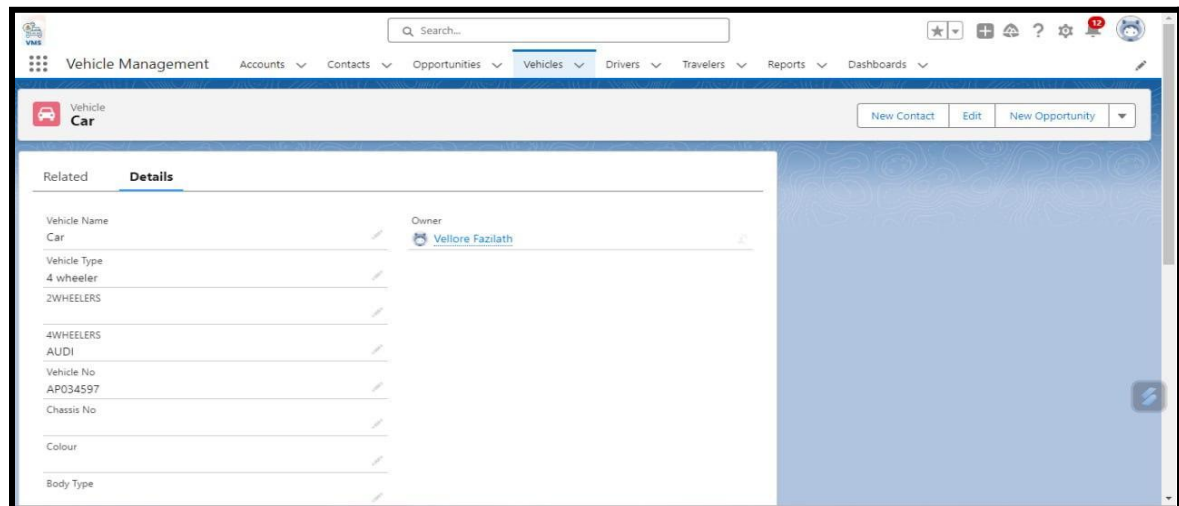
→ Create Vehicle Record :

- ❖ 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



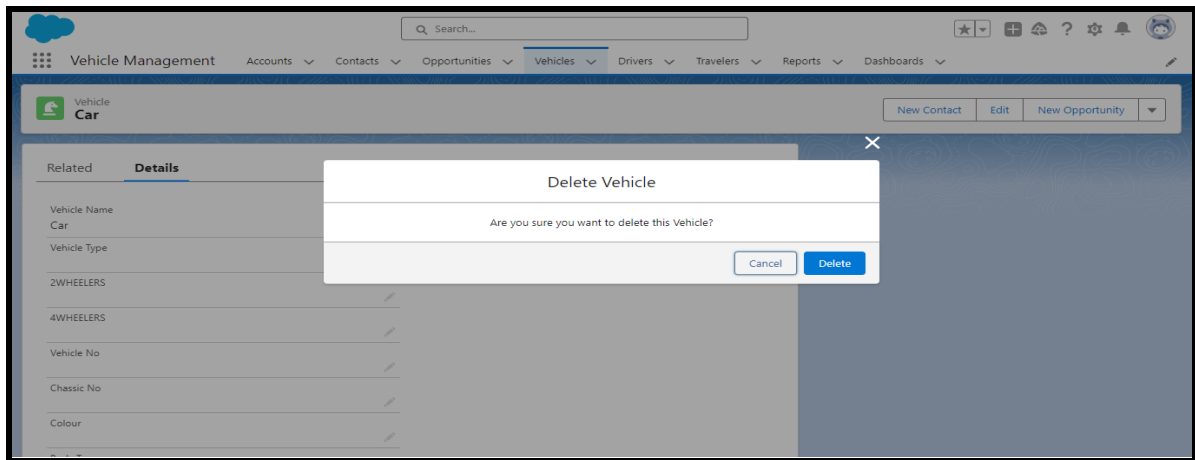
→ View Record (Vehicle) :

- ❖ 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) :

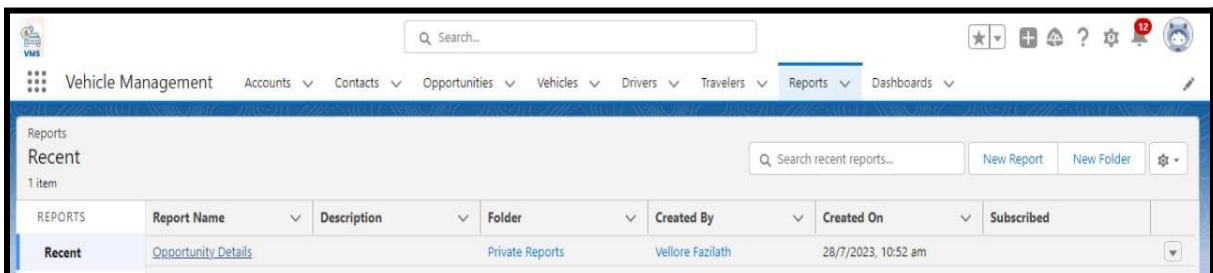
- ❖ Click on App Launcher on left side of screen.
- ❖ Search Vehicle Management System & click on it.
- ❖ Click on Vehicle Tab.
- ❖ Click on Arrow at right hand side on that Particular record.
- ❖ Click delete and delete again.



9. **Report & Dashboards**

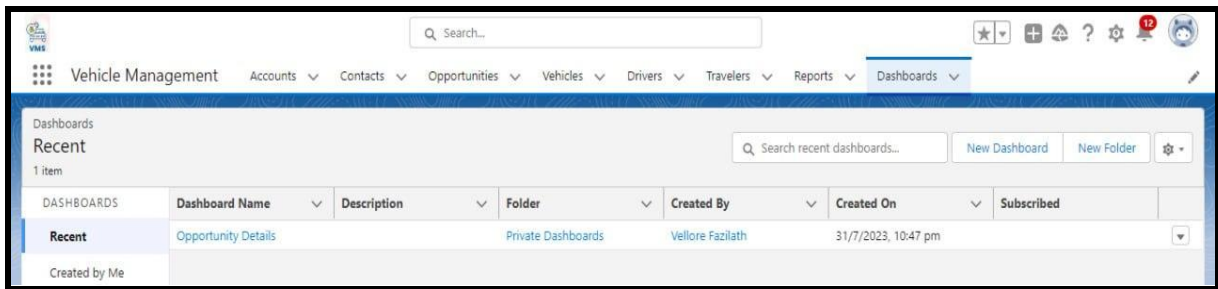
→ Create Report :

- ❖ 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.



→ 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.



10. Reporting

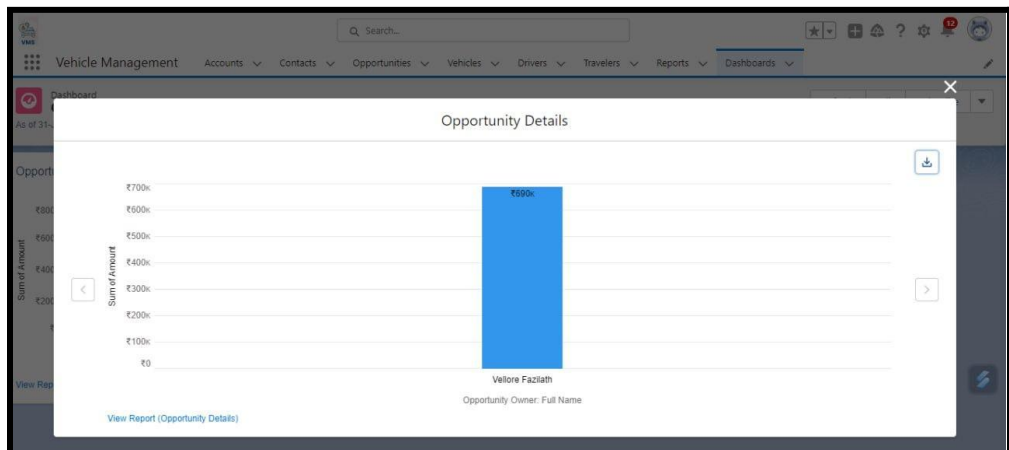
→ Report :

- ❖ 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

Opportunity Owners: Full Name	Account Name	Amount	Contact: Full Name	Journey End Date	Journey Start Date	Opportunity ID	Vehicle: Vehicle Name	Created Date
Vellore Fazilath (7)	ige Communications	₹75,000.00	-	-	-	0065/00001IngTe	-	18/07/2022
	ige Communications	₹35,000.00	-	-	-	0065/00001IngTi	-	18/07/2022
	and Hotels & Resorts Ltd	₹2,50,000.00	-	-	-	0065/00001IngTZ	-	18/07/2022
	nted Oil & Gas Corp.	₹1,20,000.00	-	-	-	0065/00001IngTY	-	18/07/2022
	nted Oil & Gas Corp.	₹1,20,000.00	-	-	-	0065/00001IngTt	-	18/07/2022
	nePoint	₹60,000.00	-	-	-	0065/00001IngTe	-	18/07/2022
	nePoint	₹30,000.00	-	-	-	0065/00001IngTf	-	18/07/2022
Subtotal		₹6,90,000.00						
Total (7)		₹6,90,000.00						

→ 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



*** THE END ***