

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 – TIRUNAM&SRAVANI
- ❖ Email -muralichandrababu460@gmail.com
- ❖ Role : Developer
- ❖ Company : College Name - GAYATRI DEGREE COLLEGE
- ❖ County : India
- ❖ Postal Code : pin code - 517520
- ❖ Username : muralichandrababu460@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.


→ Vehicle :



The screenshot shows the Salesforce Object Manager interface. The search bar at the top right contains the text 'vehicle'. Below the search bar, there is a table with the following columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The table contains one row for the 'Vehicle' object, which is a Custom Object, last modified on 26/07/2023, and is deployed (indicated by a checkmark).

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

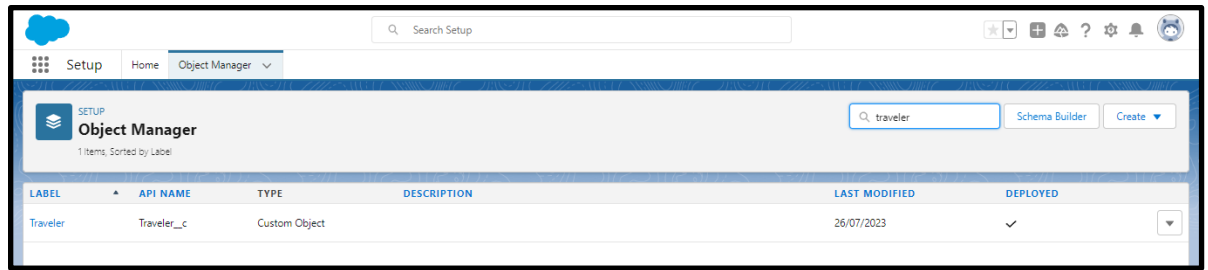
→ Driver :



The screenshot shows the Salesforce Object Manager interface. The search bar at the top right contains the text 'driver'. Below the search bar, there is a table with the following columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The table contains one row for the 'Driver' object, which is a Custom Object, last modified on 26/07/2023, and is deployed (indicated by a checkmark).

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

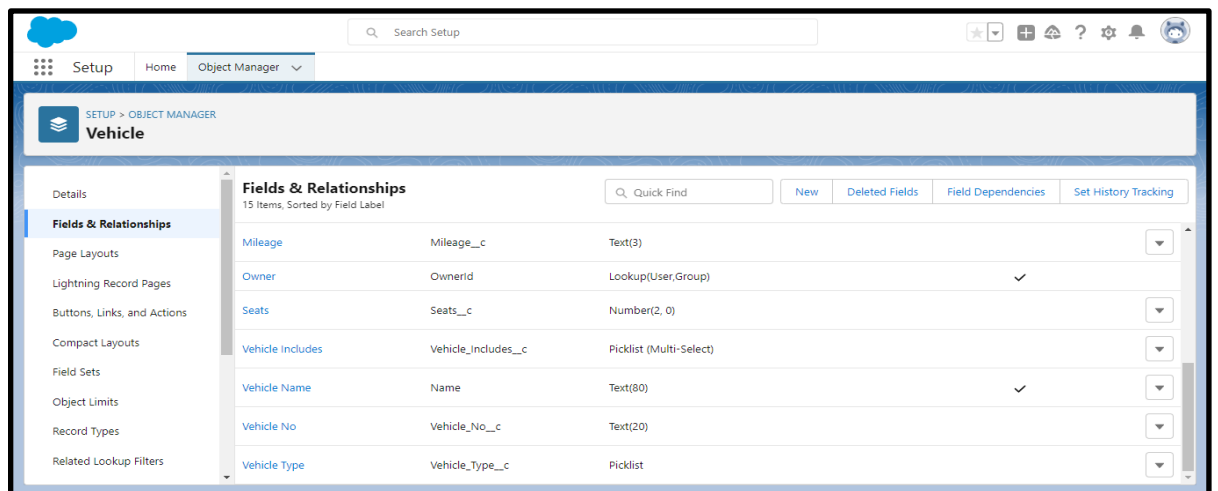
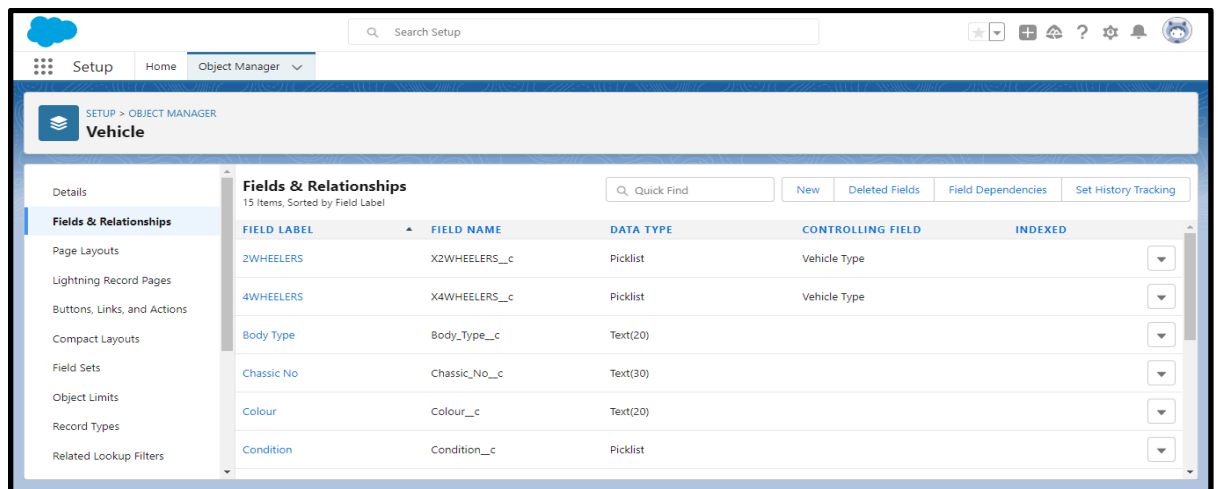
→ Traveler :



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 :



→ Fields in Vehicle Object :

SETUP > OBJECT MANAGER
Vehicle

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Vehicle Field Dependencies

[Back to Custom Object: Vehicle](#)

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

[New](#)

Action	Controlling Field	Dependent Field	Modified By
Edit Del	Vehicle Type	2 Wheeler	Tirunam Sravani , 27/07/2023, 12:52 pm
Edit Del	Vehicle Type	4 Wheeler	Tirunam Sravani , 27/07/2023, 12:54 pm

→ Fields In Driver Objects :

Setup Home Object Manager

SETUP > OBJECT MANAGER
Driver

Details

Fields & Relationships

8 Items, Sorted by Field Label

Quick Find

[New](#) [Deleted Fields](#) [Field Dependencies](#) [Set History Tracking](#)

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 a navigation menu with options: 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 shows 6 items, sorted by Field Label. The table below lists the fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
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	Name	Text(80)		✓

→ Fields In Opportunity Objects :

The screenshot shows the Salesforce Setup interface for the 'Opportunity' object. The left sidebar contains a navigation menu with options: 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 shows 31 items, sorted by Field Label. The table below lists the fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
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		

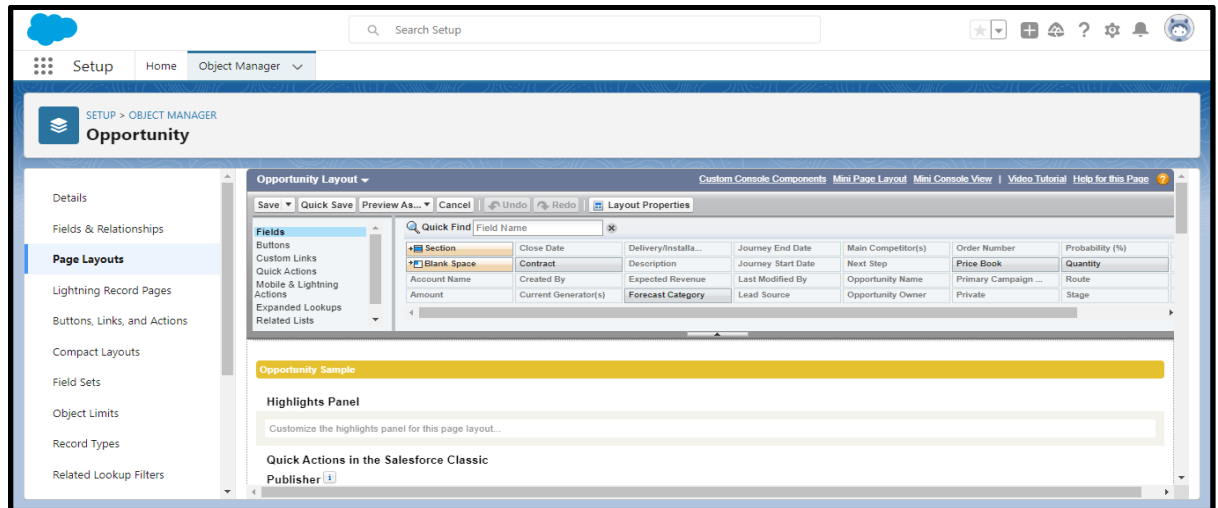
The screenshot shows the continuation of the 'Opportunity' object's 'Fields & Relationships' page. The table below lists the remaining fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
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 :

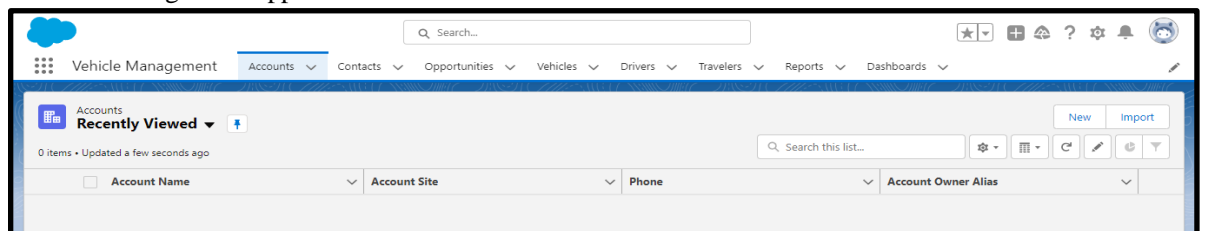
- ❖ Click on the gear icon and then select Setup.
- ❖ Click on the object manager tab just beside the home tab.
- ❖ Search in quick find (Opportunity) & select Opportunity.
- ❖ Click on page layout and you can add or remove fields by drag & drop



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.

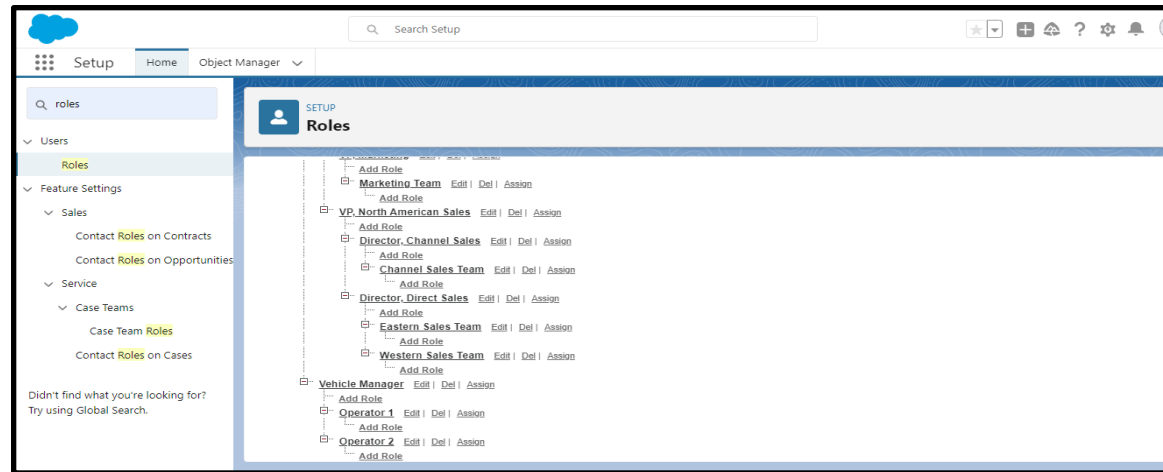
The screenshot shows the Salesforce Setup interface. The left sidebar contains navigation links: Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, ADMINISTRATION, and Users. The main content area is titled 'Profiles' and shows the 'Vehicle Manager' profile. It includes a 'Profile Detail' section with fields for Name, User License, Description, Created By, and Modified By. Below this is a 'Page Layouts' section showing 'Standard Object Layouts'.

Profile Detail	
Name	Vehicle Manager
User License	Salesforce
Description	
Created By	Tirunam Sravan
Modified By	Tirunam Sravan

Page Layouts	
Standard Object Layouts	
Global	Global avout
Object Milestone	Object Milestone avout

→ Setup Roles :

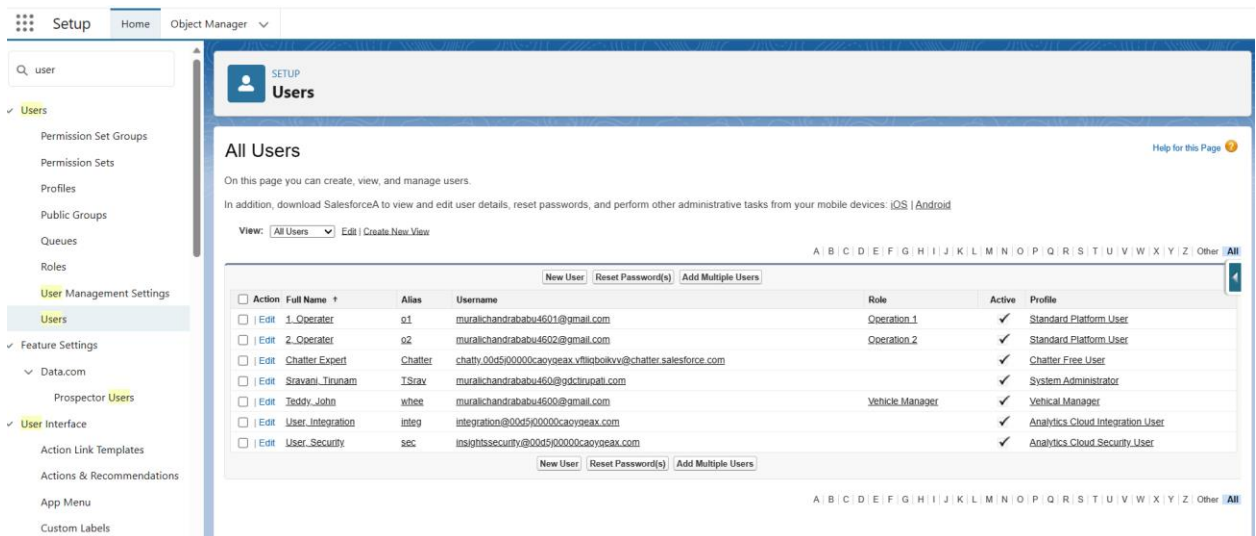
- ❖ Click on the Gear Icon
- ❖ Click "Setup"
- ❖ In the Quick Find box, enter "Roles"
- ❖ Click "Roles"
- ❖ Click on "Set Up Roles"
- ❖ Click "Expand All"
- ❖ Under the CEO, click on "Add Role"
- ❖ Fill up the Label as Vehicle Manager, Role Name Vehicle Manager.
- ❖ Enter a Role name that will be displayed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



7. Users

→ Creating A User :

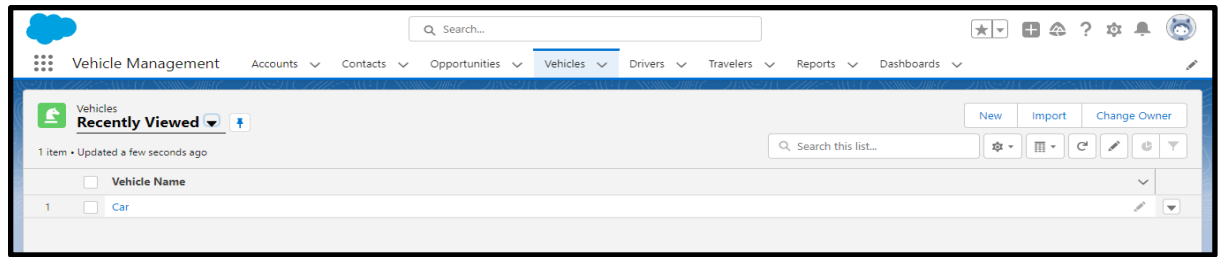
- ❖ From Setup, in the Quick Find box, enter Users, and then select Users.
- ❖ Click New User.
- ❖ Enter the user's name John Teddy and (Your) email address and a unique username in the form of an email address. By default, the username is the same as the email address.
- ❖ Select a Role(Vehicle Manager)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



8. User Adoption

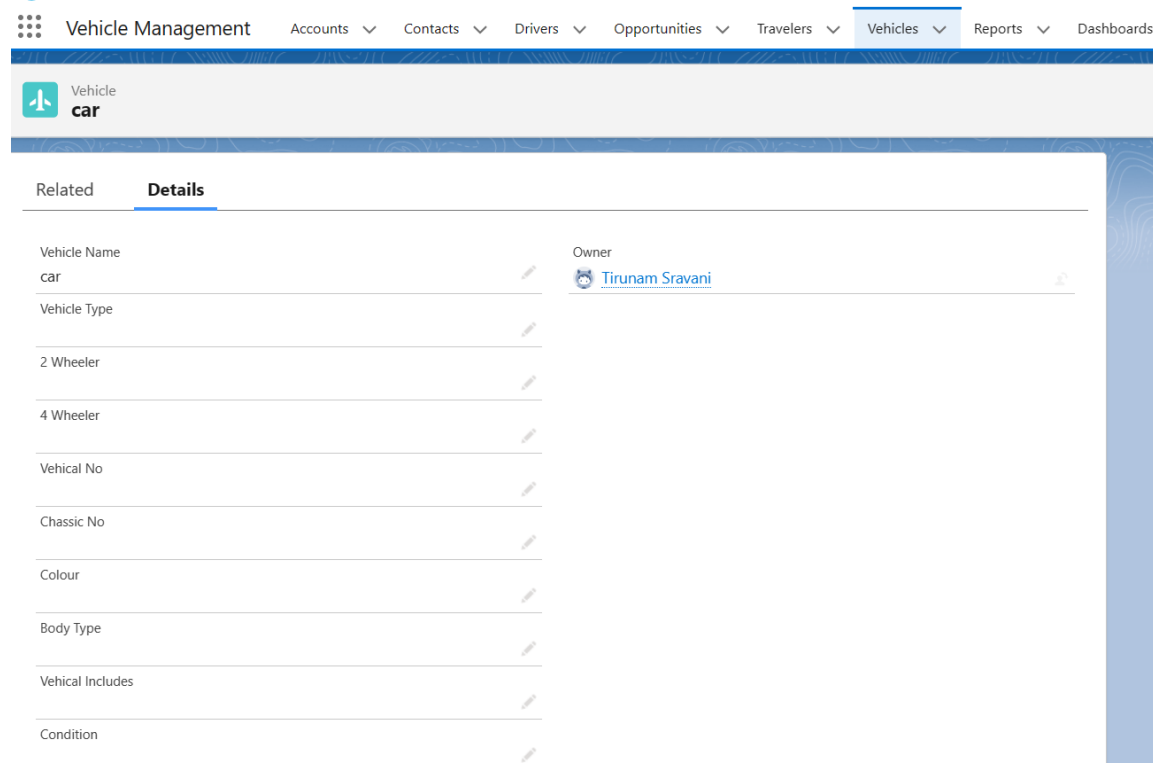
→ Create Vehicle Record :

- ❖ 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



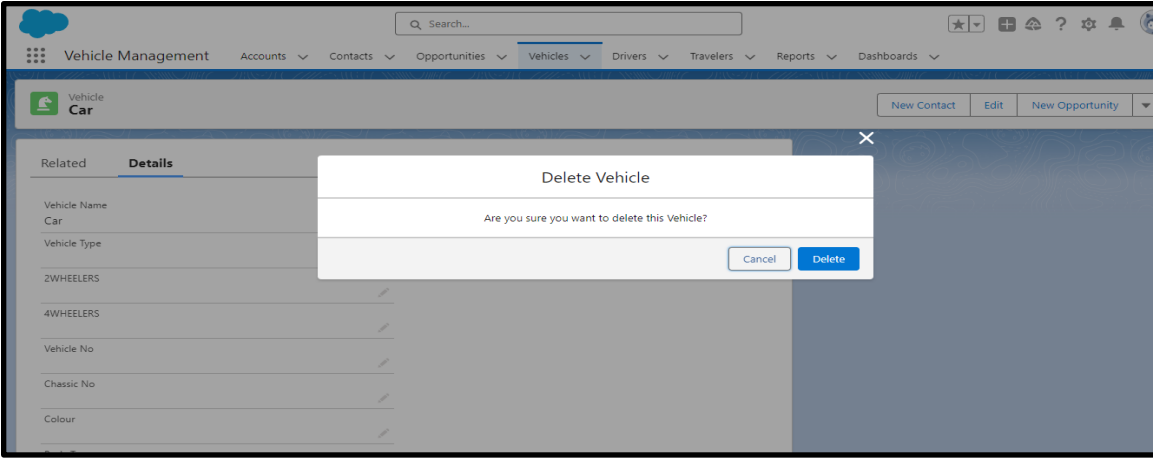
→ View Record (Vehicle) :

- ❖ 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						
REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Opportunity And Details		Private Reports	Tirunam Sravani	1/8/2023, 7:00 pm	
Created by Me						
Private Reports						
Public Reports						
All Reports						
FOLDERS						

→ 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	Tirunam Sravani	1/8/2023, 7:03 pm	
Created by Me						
Private Dashboards						

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

The screenshot shows the 'Reports' tab selected in the top navigation bar. The report title is 'Opportunity And Details'. The table below lists various opportunities for 'Tirunam Sravani (10)'. The columns include Opportunity Name, Account Name, Amount, Journey Start Date, Journey End Date, Vehicle Name, Created Date, and Opportunity ID. The total amount for all opportunities is ₹15,20,000.00.

Opportunity Owner: Full Name	Opportunity Name	Account Name: Account Name	Amount	Journey Start Date	Journey End Date	Vehicle: Vehicle Name	Created Date	Opportunity ID
Tirunam Sravani (10)	GenePoint Lab Generators	GenePoint	₹60,000.00	-	-	-	26/07/2023	00650
	GenePoint SLA	GenePoint	₹30,000.00	-	-	-	26/07/2023	00650
	Edge Emergency Generator	Edge Communications	₹75,000.00	-	-	-	26/07/2023	00650
	Edge Emergency Generator	Edge Communications	₹35,000.00	-	-	-	26/07/2023	00650
	Grand Hotels Emergency Generators	Grand Hotels & Resorts Ltd	₹2,10,000.00	-	-	-	26/07/2023	00650
	Grand Hotels Generator Installations	Grand Hotels & Resorts Ltd	₹3,50,000.00	-	-	-	26/07/2023	00650
	Grand Hotels Guest Portable Generators	Grand Hotels & Resorts Ltd	₹2,50,000.00	-	-	-	26/07/2023	00650
	United Oil Refinery Generators	United Oil & Gas Corp.	₹2,70,000.00	-	-	-	26/07/2023	00650
	United Oil SLA	United Oil & Gas Corp.	₹1,20,000.00	-	-	-	26/07/2023	00650
	United Oil Standby Generators	United Oil & Gas Corp.	₹1,20,000.00	-	-	-	26/07/2023	00650
Subtotal			₹15,20,000.00					
Total (10)			₹15,20,000.00					

→ 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

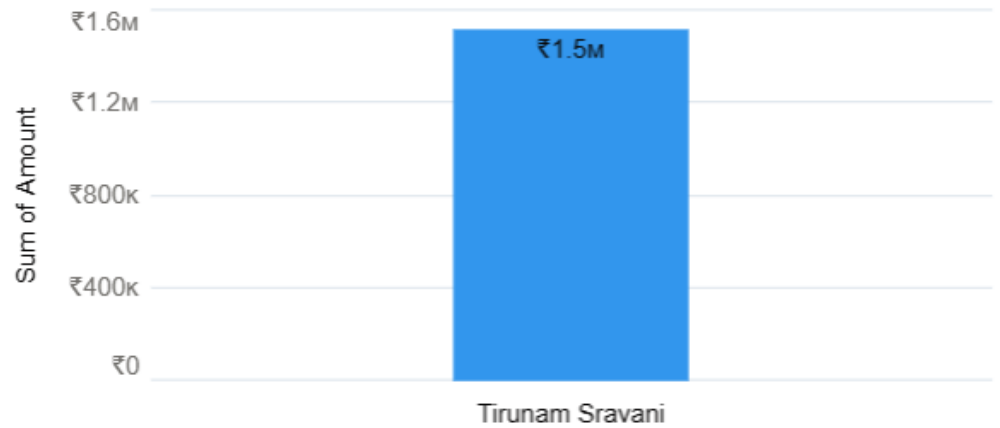


Dashboard

Opportunity Details

As of 01-Aug-2023, 7:05 pm Viewing as Tirunam Sravani

Opportunity And Details



Opportunity Owner: Full Name

[View Report \(Opportunity And Details\)](#)

*** THE END ***