



VEHICLE MANAGEMENT SYSTEMS



Beyond Knowledge

SALESFORCE NAAN MUDHALVAN PROJECT REPORT

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**MAHENDRA ENGINEERING COLLEGE FOR WOMEN
KUMARAMANGALAM-637205**

BONAFIDE CERTIFICATE

Certified that this project report titled “**VEHICLE MANAGEMENT SYSTEMS**” is the Bonafide work of “**VAISHNAVI S (611420205044), MAHALAKSHMI I (611420205024)**, **SINDHUBAIRAVI R (611420205038)**, **SIVASANKARI S (611420205039)**” who carried out the project work under my supervision.

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ACKNOWLEDGEMENT

At the outset, we express our heartfelt gratitude to **GOD**, who has been our strength to bring this project to light.

At this pleasing moment of having successfully completed our project, we wish to convey our sincere thanks and gratitude to our beloved president **Mr. C. Balakrishnan**, who has provided all the facilities to us. We would like to convey our sincere thanks to our beloved Principal **Dr.B.DORA ARULSELVI,M.E,P.hd** , for forwarding us to do our project and offering adequate duration in completing our project.

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1. INTRODUCTION

Salesforce, a leading cloud-based Customer Relationship Management (CRM) platform, is a pivotal tool for organizations to manage customer data, optimize sales processes, and elevate customer interactions. Its multifaceted features include Sales Cloud, which enhances sales management through lead tracking, opportunity management, and seamless email integration.

Service Cloud focuses on exceptional customer support, featuring case management, knowledge base development, and multi-channel support. Marketing Cloud empowers businesses with marketing automation, email campaigns, social media engagement, and in-depth analytics. Salesforce's hallmark is its customizability, allowing businesses to tailor the platform to meet specific requirements, while robust integration capabilities facilitate seamless connections with other business applications.

The platform equips businesses with powerful reporting and analytics tools, enabling data-driven decisions and insightful, customized reports and dashboards. Salesforce ensures mobile accessibility, enabling users to stay connected and productive while on the move. A paramount emphasis on data security and compliance guarantees data protection and privacy. Whether you're a small start-up or a large enterprise, Salesforce offers scalability to accommodate your evolving needs.

Through Salesforce, organizations foster improved customer relationships, increased sales efficiency, and superior customer support. It empowers businesses to make data-driven decisions, streamline operations, and create impactful, targeted marketing campaigns. This introduction encapsulates Salesforce's capabilities and benefits, offering a concise overview for your project document, allowing for a

better understanding of how the platform can contribute to your specific project goals.

2.PROJECT SPECIFICATIONS

2.1 Project Goal

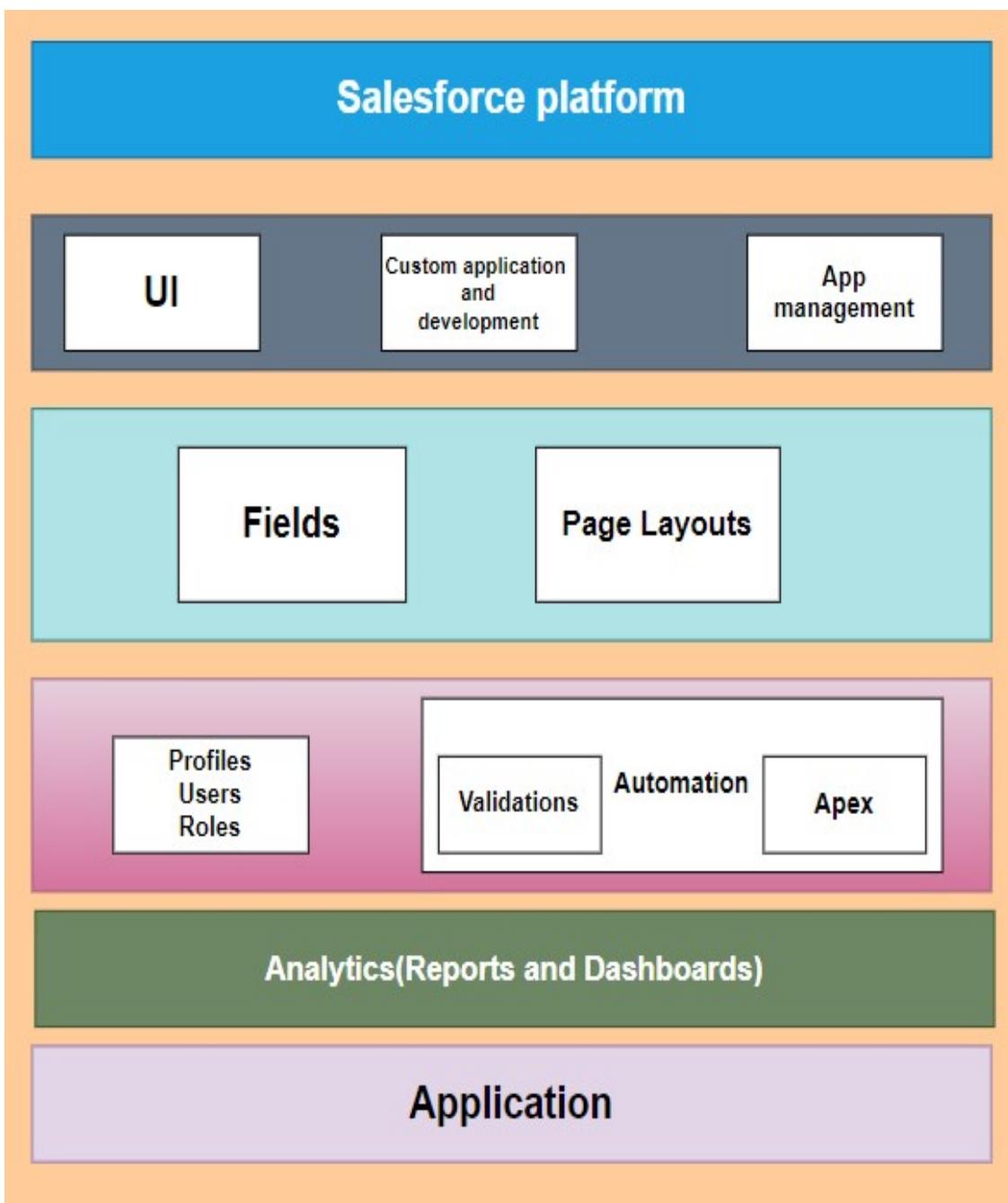
To assist in the tracking of vehicles operation and the planning of maintenance (i.e.: replacement of spare parts, etc.) that is important to avoid any damage/unexpected problem that might occur in the future that may cause hindrance to the operation and/or risking the safety of the drivers and passengers.

2.2 Project Scope

- **Creation of Developer Account (Milestone 1):** This involves setting up a developer account on the Salesforce platform, which will serve as the foundation for building the CRM application.
- **Object Creation (Milestone 2):** Custom objects and relationships will be defined to efficiently store and manage data related to job applications, recruiters, and other relevant information.
- **Tabs Creation (Milestone 3):** Tabs will be configured to provide user-friendly access to different sections and functionalities within the CRM application.
- **Create App (Milestone 4):** The CRM application will be created, and it will serve as the central hub for managing job applications and accessing job postings.
- **Fields & Relationships (Milestone 5):** Custom fields and relationships will be established to capture specific data attributes related to job applications and recruiters.

- **Profile (Milestone 6):** User profiles will be configured to define access permissions and roles within the application.
- **Role and Role Hierarchy (Milestone 7):** Role-based access control will be set up to determine who can view and edit specific data within the CRM.
- **Users (Milestone 8):** User management will involve adding and configuring user accounts, specifying their roles and access levels.
- **Sharing Rules (Milestone 9):** Sharing rules will be defined to ensure that users can appropriately share and access data based on predefined criteria.
- **User Adoption (Milestone 10):** Strategies and tools will be implemented to encourage user adoption and make the application user-friendly.
- **Reports (Milestone 11):** Custom reports will be created to track and analyse job application data, providing valuable insights for users.
- **Dashboards (Milestone 12):** Dashboards will be designed to display key performance indicators and visual summaries of application data.
- The project aims to create a comprehensive CRM application that helps job applicants track their applications and access job postings from recruiters. It covers the technical architecture, data modeling, and user adoption aspects of Salesforce. The scope is to deliver an efficient, user-friendly, and productive tool for managing the job application process within the Salesforce platform.

2.3 Technical Requirements



2.4 Functional Requirements

- **User Registration and Authentication:** Users should be able to create accounts with unique usernames and passwords. User authentication and authorization should be implemented to ensure data security.
- **Dashboard:** Users should have a personalized dashboard displaying key metrics such as the number of job applications submitted and the status of each application.
- **Job Application Tracking:** Users should be able to record details of each job application, including the job title, company, date applied, application status, and any related notes. Users should be able to filter and search through their job applications.
- **Job Postings:** Job postings from various recruiters should be accessible within the application. Users should be able to view details of job postings, such as job descriptions, qualifications, and application deadlines.
- **Custom Objects and Relationships:** Custom objects for job applications, job postings, and recruiters should be defined with appropriate relationships. Relationships between applicants and their job applications, as well as between job applications and job postings, should be established.
- **Profile Management:** Users should have the ability to edit their profiles and update personal information. Profiles should include user-specific settings and preferences.
- **Role-Based Access Control:** Access permissions should be defined based on user roles (e.g., applicant, recruiter). Users should only have access to data and features relevant to their roles.
- **User Management:** Administrators should be able to add, modify, or deactivate user accounts. User roles and permissions should be customizable.

- **Sharing Rules:** Sharing rules should be configured to allow data sharing based on predefined criteria, ensuring privacy and data access control.
- **Reporting:** Users should be able to generate custom reports based on their job application data. Standard reports and report templates should be available for common use cases.
- **Notifications and Reminders:** Users should receive notifications and reminders for application deadlines, interview schedules, and other important events. Notifications can be delivered via email or within the application.
- **Integration with External Platforms:** Integration with job search platforms or websites to import job postings automatically. Integration with email services to track application-related correspondence.
- **Data Import and Export:** Users should have the capability to import and export their application data for backup or transfer purposes.
- **User Adoption Features:** Onboarding guides, tutorials, and tooltips to help users navigate and effectively use the system. Feedback mechanisms to collect user suggestions and improve the application.
- **Customization and Configuration:** Administrators should be able to customize the application's appearance, fields, and workflows to suit their organization's needs.
- **Mobile Accessibility:** The application should be accessible on mobile devices to allow users to track job applications on the go.
- **Security and Data Privacy:** Data encryption, secure connections, and compliance with data privacy regulations (e.g., GDPR) should be implemented to protect user data.
- **Scalability:** The system should be scalable to accommodate a growing number of users, job applications, and job postings.
- **Backup and Recovery:** Regular data backups and a disaster recovery plan should be in place to prevent data loss.

3.PREPARATION DATA MODELING

Objects:

Salesforce objects are database tables that permit you to store data that is specific to an organization. It consists of fields (columns) and records (rows).

Salesforce objects are of two types:

1.Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

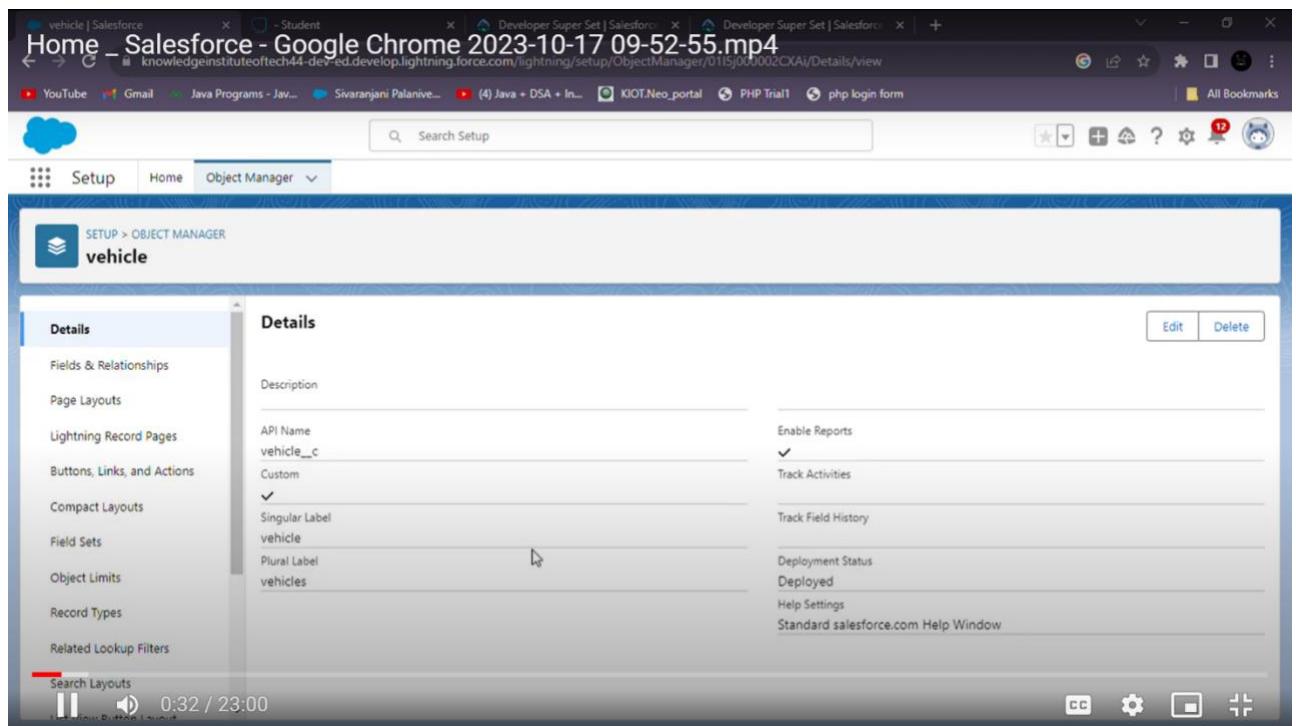
2.Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

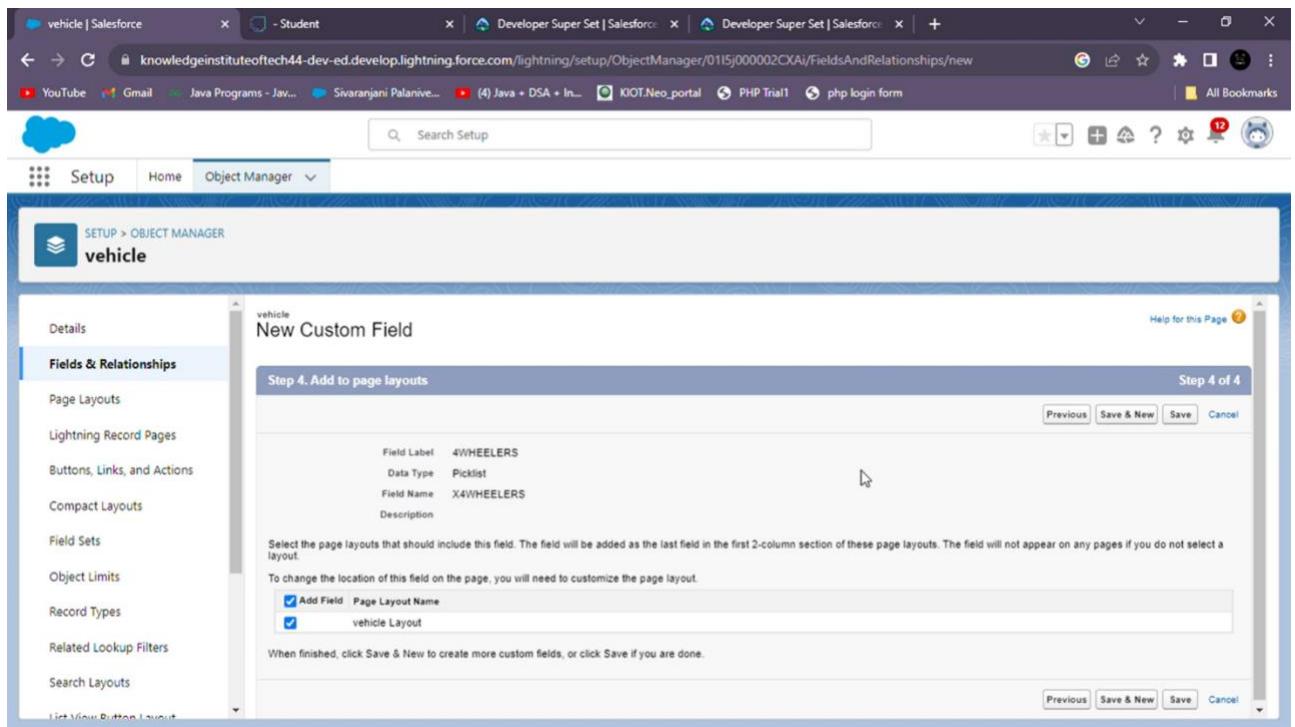
In This Application We Use 7 Custom Objects:

- 1.Vehicle
- 2.Vehicles
- 3.Vehicle Object
- 4.Vehicle Name
- 5.Driver
- 6.Driver Name
- 7.Vehicle Type

1)Create A Custom Object for Vehicle:

- 1.From setup click on object manager.
- 2.Click create, select custom object.
- 3.Fill in the label as " Vehicle".
- 4.Fill in the plural label as " Vehicles ".
- 5.Record name: " Vehicle Name"
- 6.Select the data type as "Text".
- 7.In the Optional Features section, select Allow Reports and Track Field History.
- 8.In the Deployment Status section, ensure Deployed is selected.
- 9.In the Search Status section, select Allow Search.
- 10.In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
- 11.Leave everything else as is, and click Save.





2) Creation of Vehicle Object

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
5. Label: Vehicle
6. Plural Label: Vehicle
7. Record Name: Vehicle Name
8. Select the data type as "Text".
9. Check the Allow Reports checkbox
10. Check the Allow Search checkbox
11. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout
12. Click Save.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A search bar at the top right contains the text 'Search Setup'. The main content area is titled 'New Custom Object' under the 'SETUP' tab. A message bar at the top indicates that permissions are disabled by default and provides links to 'Tell me more!' and 'Don't show this message again'. The 'Custom Object Definition Edit' form has the following fields:

- Custom Object Information**:
 - Label: Example: Account
 - Plural Label: Example: Accounts
 - Starts with vowel sound:
- Description**: A large text input field.

A yellow banner at the bottom right of the page says 'Help for this Page' with a question mark icon.

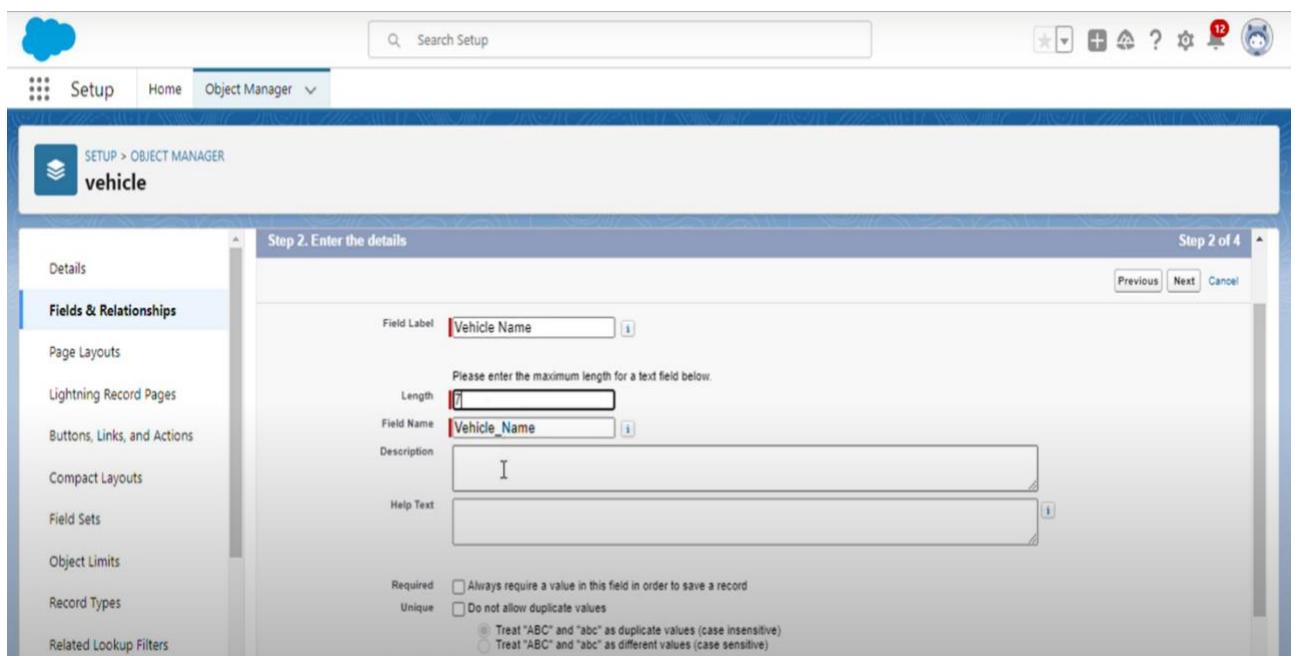
The screenshot shows the continuation of the 'New Custom Object' setup page. It includes sections for optional features, object classification, deployment status, and search status.

- Optional Features**:
 - Allow Reports
 - Allow Activities
 - Track Field History
 - Allow in Chatter Groups
 - Enable Licensing [\[i\]](#)
- Object Classification**: A note states that these settings classify the object as an Enterprise Application object. It includes checkboxes for:
 - Allow Sharing
 - Allow Bulk API Access
 - Allow Streaming API Access
- Deployment Status**: A radio button selection between 'In Development' and 'Deployed'. The 'Deployed' option is selected.
- Search Status**: A note stating that users can find records of this object type when they search.

3) Creation of Fields and Relationship

1. Click on the gear icon and then select Setup.
2. Click on the object manager tab just beside the home tab.
3. After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
4. On the Custom Object Definition page, create the object as follows:
 5. Field Label: Vehicle Name
 6. Length: 7
 7. Field Name: Vehicle_Name
 8. Select the data type as "Text".
 9. Check the Allow Reports checkbox.
 10. Check the Allow Search checkbox.
 11. In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
 12. Click Save.

The screenshot shows the Salesforce Setup interface. At the top, there's a blue header bar with a cloud icon, the text 'Search Setup', and various navigation icons. Below the header, the main area has a dark blue sidebar on the left containing links like 'Setup', 'Home', 'Object Manager', 'Details', 'Fields & Relationships' (which is currently 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' and shows a list of field types with their descriptions. The 'Text' field type is selected, indicated by a blue circle next to it. Other field types listed include 'DateTime', 'Email', 'Geolocation', 'Number', 'Percent', 'Phone', 'Picklist', 'Picklist (Multi-Select)', 'Text Area', 'Text Area (Long)', 'Text Area (Rich)', 'Text (Encrypted)', and 'Time'. Each field type has a brief description below it.



4)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.After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
- 4.On the Custom Object Definition page, create the object as follows:
- 5.Field Label: Vehicle Type
- 6.Length: 7
7. Field Name: Vehicle_Type
- 8.Select the data type as "Picklist".
- 9.Check the Allow Reports checkbox.
- 10.Check the Allow Search checkbox.
- 11.In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.

12.Click Save.

The screenshot shows the Salesforce Object Manager interface for the 'vehicle' object. The left sidebar lists various setup categories: 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 displays a list of field types with their descriptions:

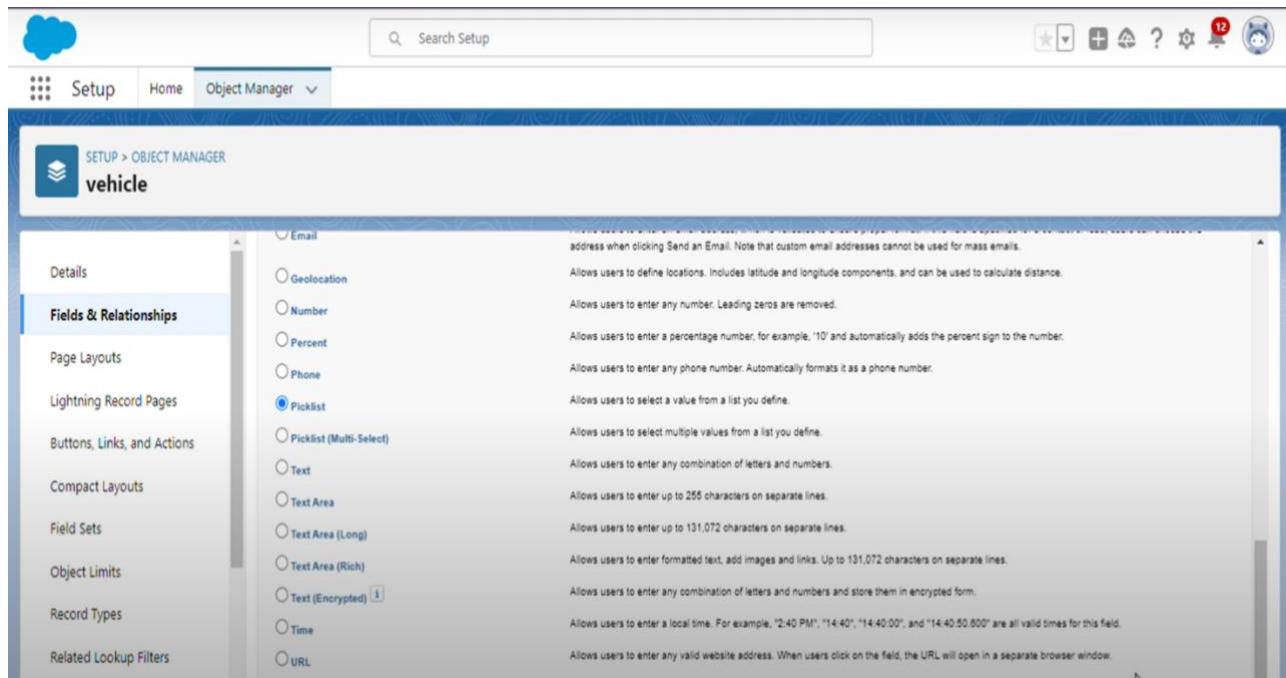
Field Type	Description
Email	Allows users to enter an email address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation	Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Number	Allows users to enter any number. Leading zeros are removed.
Percent	Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist	Allows users to select a value from a list you define.
Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
Text	Allows users to enter any combination of letters and numbers.
Text Area	Allows users to enter up to 255 characters on separate lines.
Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.
Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
Text (Encrypted)	Allows users to enter any combination of letters and numbers and store them in encrypted form.
Time	Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.000" are all valid times for this field.
URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

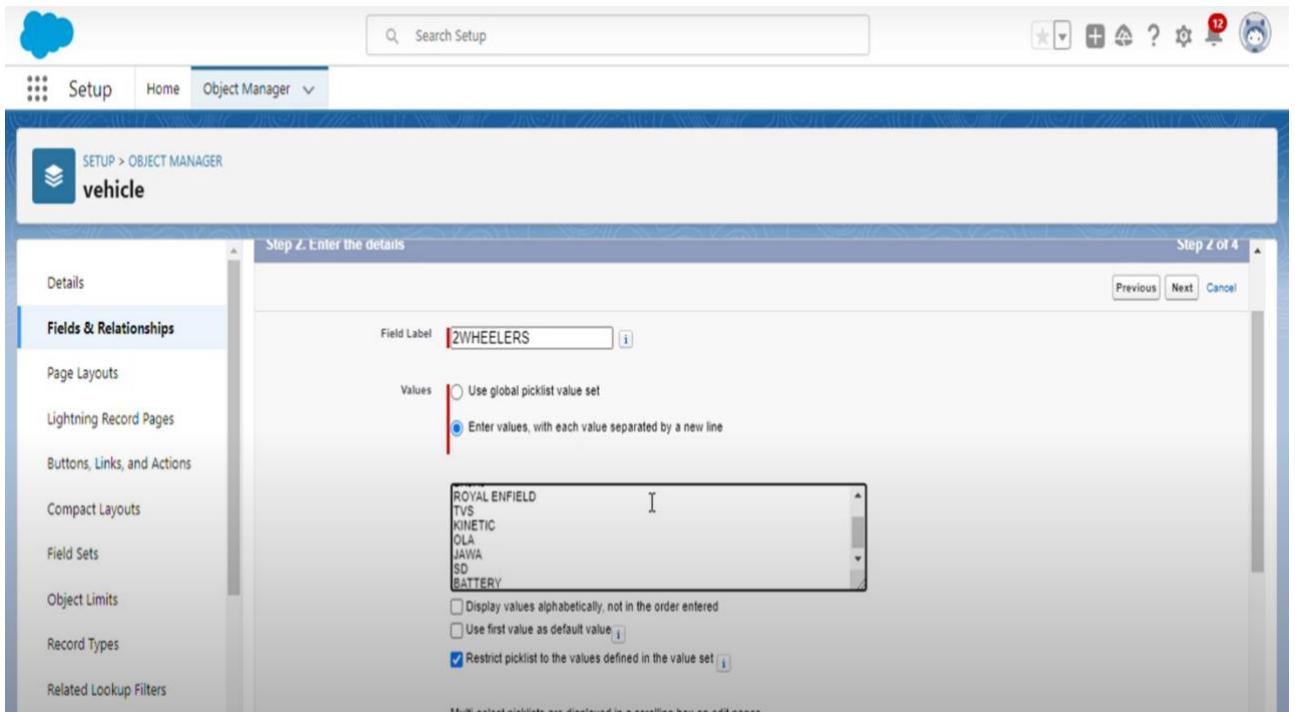
The screenshot shows the 'New Custom Field' page for the 'vehicle' object, Step 2 of 4. The left sidebar is identical to the previous screenshot. The main content area shows the 'Step 2. Enter the details' section. The 'Field Label' is set to 'Vehicle Type'. The 'Values' section has two options: 'Use global picklist value set' (unchecked) and 'Enter values, with each value separated by a new line' (checked). A text input field contains the values '2 Wheeler' and '4 Wheeler'. A checkbox at the bottom says 'Display values alphabetically, not in the order entered'.

5) 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.After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
- 4.On the Custom Object Definition page, create the object as follows:
- 5.Field Label: 2WHEELERS
- 6.Select the data type as "Picklist".
- 7.Check the Allow Reports checkbox.
- 8.Check the Allow Search checkbox.
- 9.In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
- 10.Click Save.





6) 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.After the above steps, have a look on the extreme right you will find a Create Dropdown click on that and select Custom Object.
- 4.On the Custom Object Definition page, create the object as follows:
 - 5.Field Label: 4 WHEELER
 - 6.Select the data type as "Picklist".
 - 7.Check the Allow Reports checkbox.
 - 8.Check the Allow Search checkbox.
 - 9.In the Object Creation Options section, select Add Notes and Attachments related list to default page layout.
 - 10.Click Save.

The screenshot shows the Salesforce Object Manager interface for the 'vehicle' object. The left sidebar lists various setup categories like Details, Fields & Relationships, 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 displays a list of field types with their descriptions:

Field Type	Description
Email	Allows users to enter an email address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation	Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Number	Allows users to enter any number. Leading zeros are removed.
Percent	Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist	Allows users to select a value from a list you define.
Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
Text	Allows users to enter any combination of letters and numbers.
Text Area	Allows users to enter up to 255 characters on separate lines.
Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.
Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
Text (Encrypted)	Allows users to enter any combination of letters and numbers and store them in encrypted form.
Time	Allows users to enter a local time. For example, '2:40 PM', '14:40', '14:40:00', and '14:40:50.600' are all valid times for this field.
URL	Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

The screenshot shows the configuration of a Picklist field named 'X4WHEELERS'. The 'Fields & Relationships' section is selected in the sidebar. The main area shows the following configuration details:

- Field Label:** X4WHEELERS
- Values:** Use global picklist value set (radio button) is selected.
- Enter values, with each value separated by a new line:** This input field contains:

```
RENAULT
SKODA
HONDA
HYUNDAI
SUZUKI
MAHINDRA
```
- Additional Options:**
 - Display values alphabetically, not in the order entered
 - Use first value as default value
 - Restrict picklist to the values defined in the value set
- Field Name:** X4WHEELERS
- Description:** (Empty text area)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
2WHEELERS	X2WHEELERS_c	Picklist (Multi-Select)		
4WHEELERS	X4WHEELERS_c	Picklist		
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	
Vehicle Name	Vehicle_Name_c	Text(7)		
Vehicle Name	Name	Text(80)	✓	
Vehicle Type	Vehicle_Type_c	Picklist		

7)Creation of Page Layout

- 1.Click on the App Launcher and then select Object Manager.
- 2.Click on the object manager tab just beside the home tab.
- 3.Select the Page Layout just below the fields and relationship .
4. Click new and create the layout for the field name vehicle
- 5.Page Layout Name: vehicle Layout
- 6.Click Save.

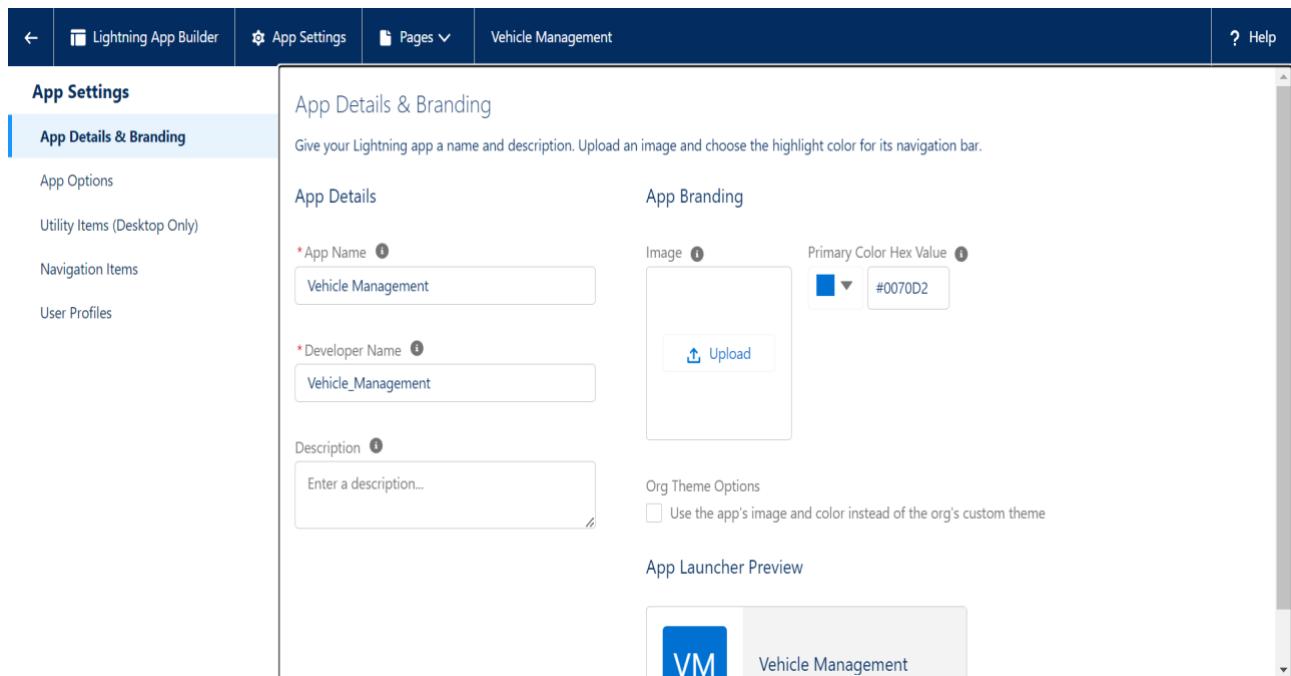
The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Includes the Salesforce logo, a search bar labeled "Search Setup", and various navigation icons.
- Breadcrumbs:** SETUP > OBJECT MANAGER > vehicle
- Left Sidebar:** A vertical list of options including Details, Fields & Relationships, Page Layouts (which is selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types.
- Table:** The main content area displays the "Page Layouts" section with the following data:

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
vehicle Layout	Sivarajani P, 17/10/2023, 9:53 am	Sivarajani P, 17/10/2023, 10:22 am
- Buttons:** Quick Find, New, and Page Layout Assignment.

8)Creation of 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
- 8.Click Save and finish.



9)Creation of 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:

- 1.Go to setup
- 2.Type profiles in quick find box
- 3.Click on profiles
- 4.Clone the desired profile (standard user is preferable)
- 5.Enter profile name
- 6.Save

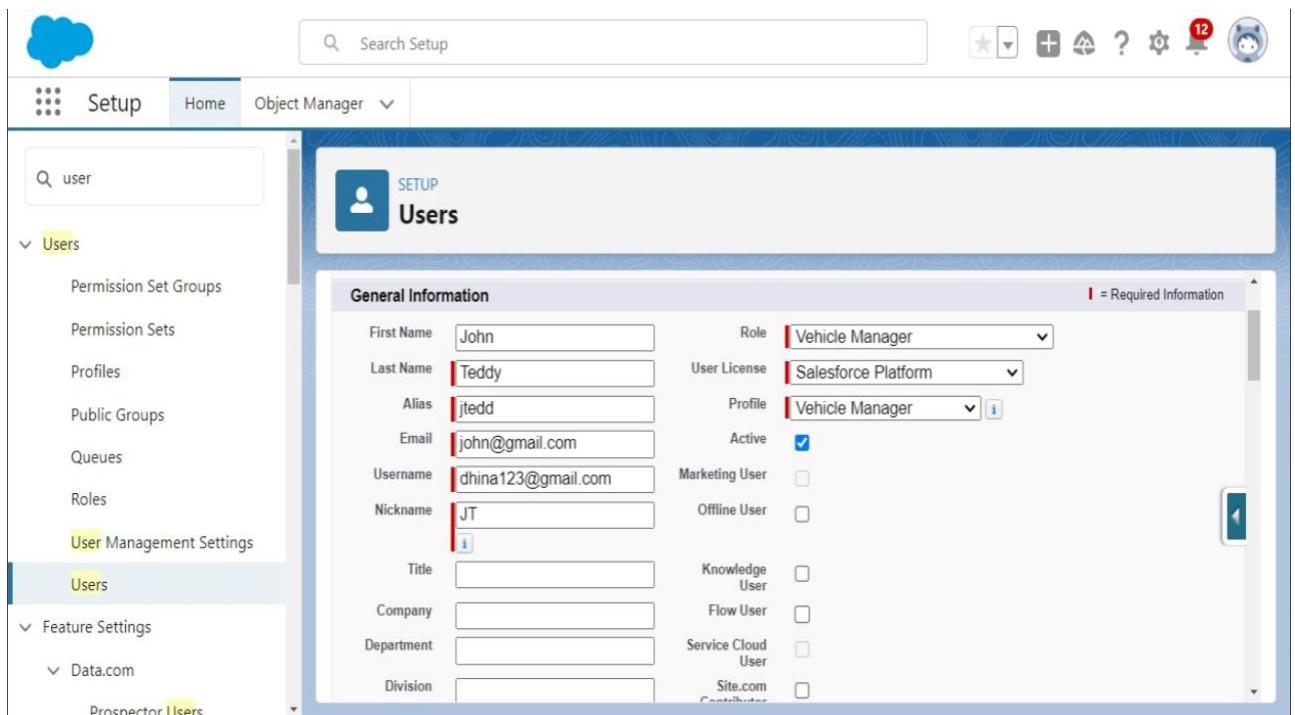
The screenshot shows the Salesforce Setup interface. In the top left, there's a blue cloud icon. The top navigation bar includes 'Search Setup' and various icons for navigation and settings. Below the navigation is a sidebar with a search bar containing 'pro'. The sidebar menu is expanded to show 'Users' (selected), 'Data', 'Feature Settings', 'Marketing', and 'Lead Processes'. Under 'Users', 'Prospector Preferences' and 'Prospector Users' are highlighted in yellow. The main content area is titled 'Profiles' under 'SETUP'. It shows a table of profiles with columns for Action, Profile Name, User License, and Custom. One profile, 'Vehicle Manager', has a checked checkbox in the 'Custom' column. The table includes links for Edit | Clone and other actions. At the bottom, there are pagination controls and a 'Page' dropdown.

This screenshot shows the 'Profile Edit' screen for the 'Vehicle Manager' profile. The top navigation and sidebar are identical to the previous screenshot. The main content area is titled 'Vehicle Manager' under 'SETUP'. It says 'Set the permissions and page layouts for this profile.' Below this is a 'Profile Edit' form with fields for 'Name' (set to 'Vehicle Manager'), 'User License' (set to 'Salesforce Platform'), and 'Custom Profile' (checkbox checked). There's also a 'Description' field which is empty. Below the form is a section titled 'Custom App Settings' with two rows of app settings. The first row contains 'Analytics Studio (standard__Insights)' and 'App Launcher (standard__AppLauncher)'. The second row contains 'Vehicle Management (Vehicle_Management)' and 'Vehicle Management Construction (Vehicle_Management_Construction)'. Each row has 'Visible' and 'Default' checkboxes. The 'Vehicle Management Construction' row has its 'Visible' checkbox checked.

10)Creation of User

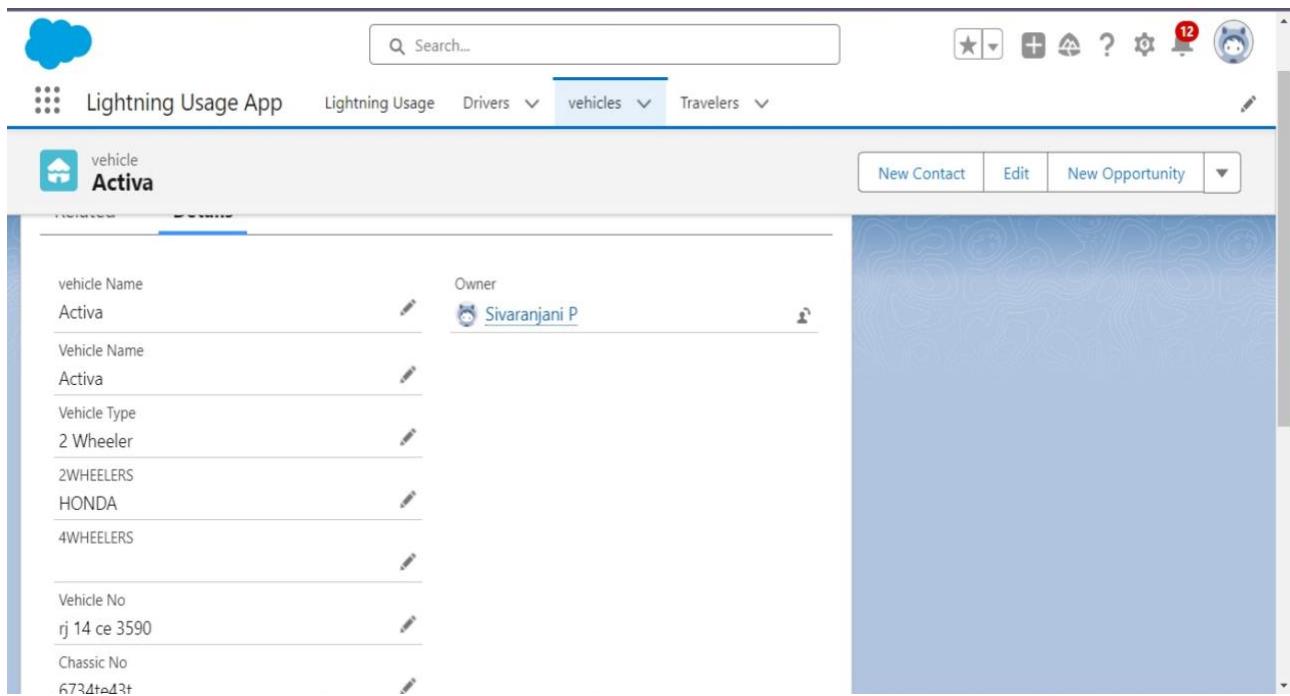
1. From Setup, in the Quick Find box, enter Users, and then select Users.
2. Click New User.

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.



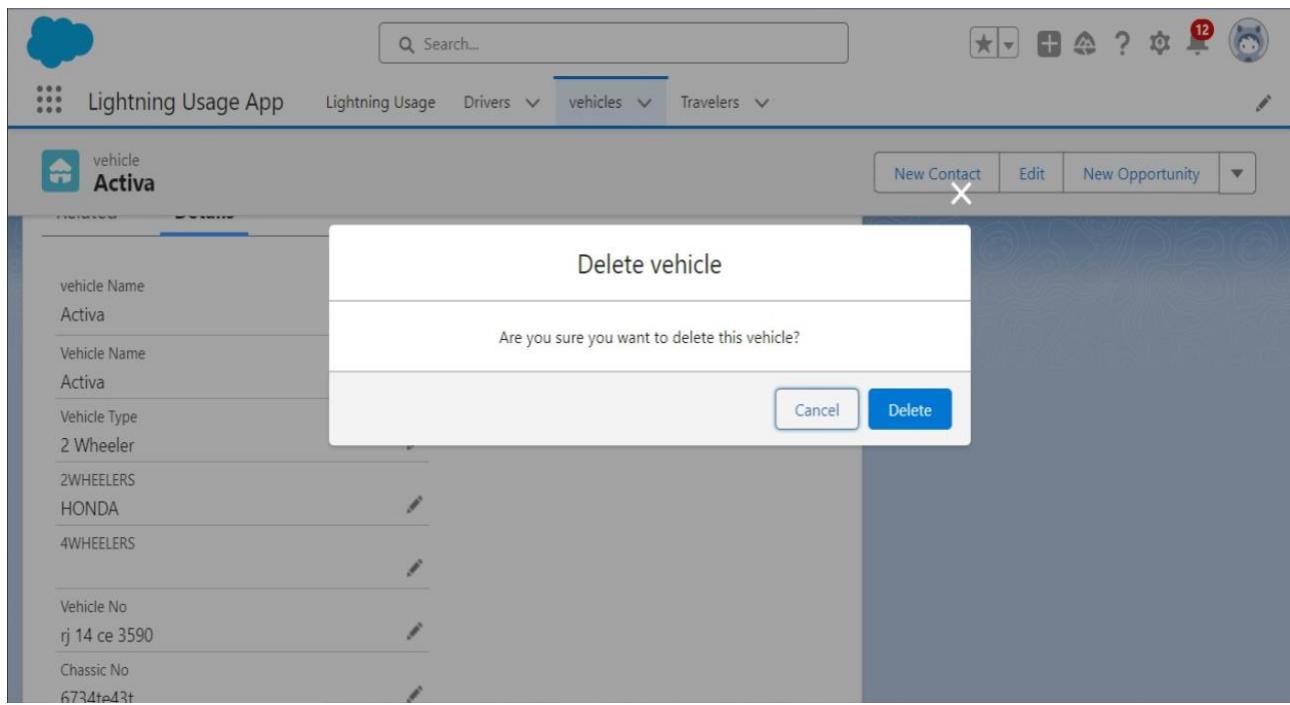
11)View Record (Vehicle):

- 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



12)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.



13) Creation of Report

1. Click on the App Launcher and then select Object Manager.
2. Click on the object manager tab just beside the home tab.
3. Select the Report that is above the page in Vehicle Management Page.
4. Click new and create the new report for the Vehicle Management
5. Report Name: New Opportunities Report
6. Click Save.

The screenshot shows the 'Create Report' dialog in the Salesforce interface. On the left, a sidebar titled 'Category' lists 'Recently Used' and 'All' (which is selected). Under 'All', there are categories for 'Accounts & Contacts', 'Opportunities', 'Customer Support', and 'Reports'. The main area is titled 'Select a Report Type' and contains a search bar with the query 'veh'. A table lists a single report type: 'Report Type Name' is 'vehicles' and 'Category' is 'Standard'. To the right, a panel titled 'Details' shows a summary for 'vehicles', including its icon, name, and status as a 'Standard Report Type'. A 'Start Report' button is also present.

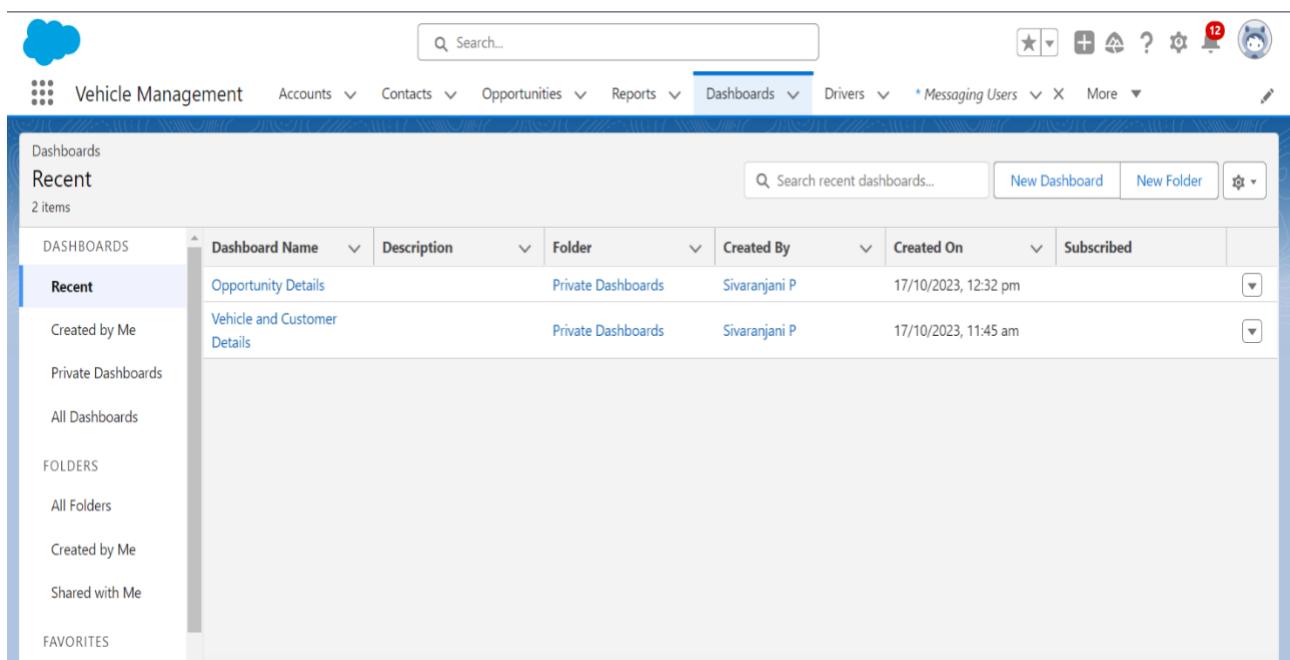
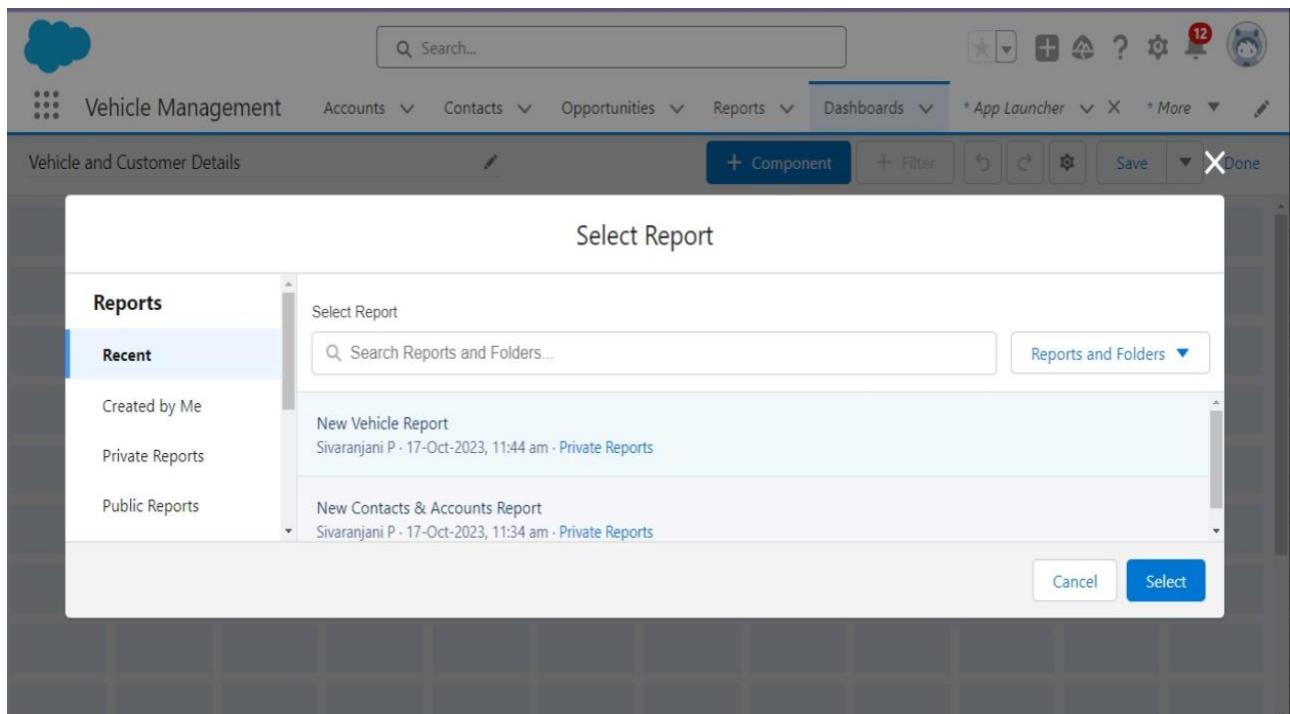
The screenshot shows the 'New Dashboard' dialog in the Salesforce interface. The title bar says 'New Dashboard'. The form includes fields for 'Name' (containing 'Vehicle and Customer Details'), 'Description' (empty), and 'Folder' (empty). At the bottom are 'Cancel' and 'Create' buttons. The background shows a grid-based dashboard design.

The screenshot shows the Salesforce interface for Vehicle Management. At the top, there's a navigation bar with tabs for Accounts, Contacts, Opportunities, Reports, Dashboards, Drivers, Messaging Users, More, and a search bar. Below the navigation bar is a sidebar titled 'Reports' with sections for Recent, Created by Me, Private Reports, Public Reports, and All Reports. The main area displays a table of recent reports with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. Three reports are listed: 'New Opportunities Report' (Private Reports, Sivaranjani P, 17/10/2023, 12:29 pm), 'New Vehicle Report' (Private Reports, Sivaranjani P, 17/10/2023, 11:44 am), and 'New Contacts & Accounts Report' (Private Reports, Sivaranjani P, 17/10/2023, 11:34 am). There are also buttons for 'New Report' and 'New Folder'.

Report Name	Description	Folder	Created By	Created On	Subscribed
New Opportunities Report	Private Reports	Sivaranjani P	17/10/2023, 12:29 pm	<input type="checkbox"/>	
New Vehicle Report	Private Reports	Sivaranjani P	17/10/2023, 11:44 am	<input type="checkbox"/>	
New Contacts & Accounts Report	Private Reports	Sivaranjani P	17/10/2023, 11:34 am	<input type="checkbox"/>	

14)Creation of Dashboard

- 1.Click on the App Launcher and then select Object Manager.
- 2.Click on the object manager tab just beside the home tab.
- 3.Select the Dashboard that is above the page in Vehicle Management Page.
4. Click new and create the new dashboard for the Vehicle Management
- 5.Dashboard Name: Vehicle and customer details
- 6.Click Save.



15)Report Viewing

- 1.Click on App Launcher on left side of screen.
- 2.Search Vehicle Management System & click on it.
- 3.Click on Reports Tab.

4.Click on Opportunity Details report and see records

The screenshot shows the Salesforce Reports page. On the left, there's a sidebar with categories like 'Reports', 'Recent' (which is selected), 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'Folders', 'All Folders', 'Created by Me', and 'Shared with Me'. The main area displays a table with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. Three recent reports are listed:

Report Name	Description	Folder	Created By	Created On	Subscribed
New Opportunities Report	Private Reports	Sivaranjani P	17/10/2023, 12:29 pm	<input type="checkbox"/>	
New Vehicle Report	Private Reports	Sivaranjani P	17/10/2023, 11:44 am	<input type="checkbox"/>	
New Contacts & Accounts Report	Private Reports	Sivaranjani P	17/10/2023, 11:34 am	<input type="checkbox"/>	

The screenshot shows the 'New Opportunities Report' detail view. At the top, it says 'Report: Opportunities' and 'New Opportunities Report'. Below that, it shows 'Total Records' and the number '1'. A table is displayed with columns: Created Date, Close Date, Opportunity Owner, and Opportunity Name. One record is shown: 01/10/2023 (1) | 03/10/2023 (1) | Sivaranjani P | Edge Emergency Generator. There are also 'Subtotal' and 'Total (1)' rows. At the bottom, there are checkboxes for 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total'.

16)Dashboard Viewing

- 1.Click on App Launcher on left side of screen.
- 2.Search Vehicle Management System & click on it.

3.Click on Dashboard Tab.

4.Click on Opportunity and Dashboard and see graph view of records

The screenshot shows the Salesforce interface for 'Vehicle Management'. The top navigation bar includes links for Accounts, Contacts, Opportunities, Reports, Dashboards (which is currently selected), Drivers, Vehicles, Travelers, and More. A search bar at the top right is labeled 'Search...'. Below the navigation is a sidebar with sections for Dashboards, Recent (3 items), Folders (All Folders, Created by Me, Shared with Me), and Favorites. The main content area displays a table of dashboards:

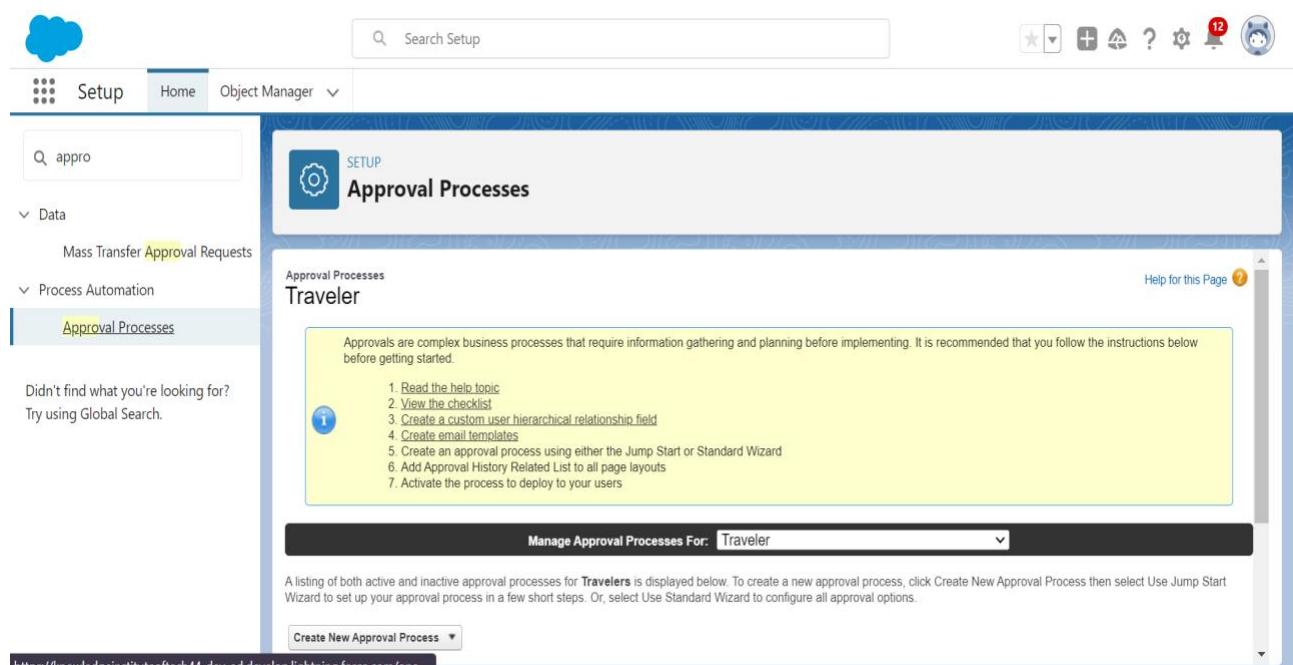
DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Opportunity and Dashboard		Private Dashboards	Sivaranjani P	23/10/2023, 1:28 pm	<input type="checkbox"/>
Created by Me	Opportunity Details		Private Dashboards	Sivaranjani P	17/10/2023, 12:32 pm	<input type="checkbox"/>
Private Dashboards	Vehicle and Customer Details		Private Dashboards	Sivaranjani P	17/10/2023, 11:45 am	<input type="checkbox"/>
All Dashboards						

The screenshot shows a detailed view of a dashboard titled 'New Opportunities Report' for the 'Opportunity and Dashboard' record. The dashboard has a title 'As of 23-' and a subtitle 'New Opportunities Report'. It features a chart titled 'Record Count' showing the count of opportunities between 'Close Date' (01/10/2023) and 'Created Date' (03/10/2023). The chart has a single blue bar extending from 0 to 1, labeled '1'. There are navigation arrows for date selection and a download icon. At the bottom, there are two buttons: 'View Report (New Opportunities Report)' and another 'View Report' button. The overall interface is dark-themed.

17)Creation Of Approval Process

Click Setup and select Setup.

1. Select Process Automation | Approval Processes (or use the Quick Find and search for Approval Processes)
2. In the Manage Approval Processes For list, select Driver.
3. Click Create New Approval Process and select Use Jump Start Wizard.
4. Enter the following parameters

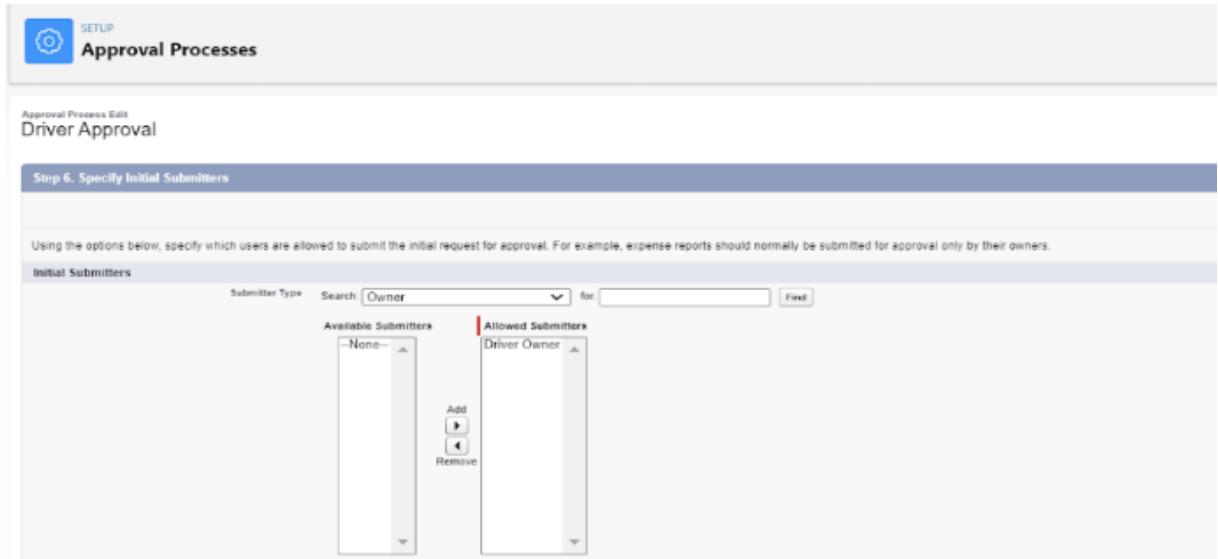


The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Search bar with "Search Setup", a gear icon, and various system status icons.
- Left Navigation:** "Setup" button, "Home", "Object Manager", and a search bar containing "appro".
- Page Title:** "Approval Processes" under the "SETUP" tab.
- Section:** "Approval Process Jump Start Wizard" for "Traveler".
- Form Fields:**
 - Name: "Driver Approval"
 - Unique Name: "Driver_Approval"
 - Approval Assignment Email Template: A dropdown menu showing "--None--" and another "--None--" option.
 - Use Approver Field of Traveler Owner: A checkbox that is unchecked.
- Help:** "Help for this Page" with a question mark icon.
- Text:** "Didn't find what you're looking for? Try using Global Search."

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Search bar with "Search Setup", a gear icon, and various system status icons.
- Left Navigation:** "Setup" button, "Home", "Object Manager", and a search bar containing "appro".
- Page Title:** "Approval Processes" under the "SETUP" tab.
- Section:** "Approval Process Jump Start Wizard" for "Traveler".
- Form Fields:**
 - Two dropdown menus labeled "From" and "To" both showing "--None--".
 - An "Add Filter Logic..." button.
 - A "Select Approver" section with the following text: "Using the options below, specify the user to whom the approval request should be assigned."
 - Three radio button options:
 - "Let the submitter choose the approver manually."
 - "Automatically assign an approver using a standard or custom hierarchy field" (selected), with a dropdown menu showing "Manager".
 - "Automatically assign to queue" with a dropdown menu.
 - "Automatically assign to approver(s)" with a dropdown menu.
- Text:** "Because this is the Jump Start Wizard, Salesforce automatically chooses some settings for you. [Show More](#)".
- Buttons:** "Save" and "Cancel".



5.AUTOMATION

Flow:

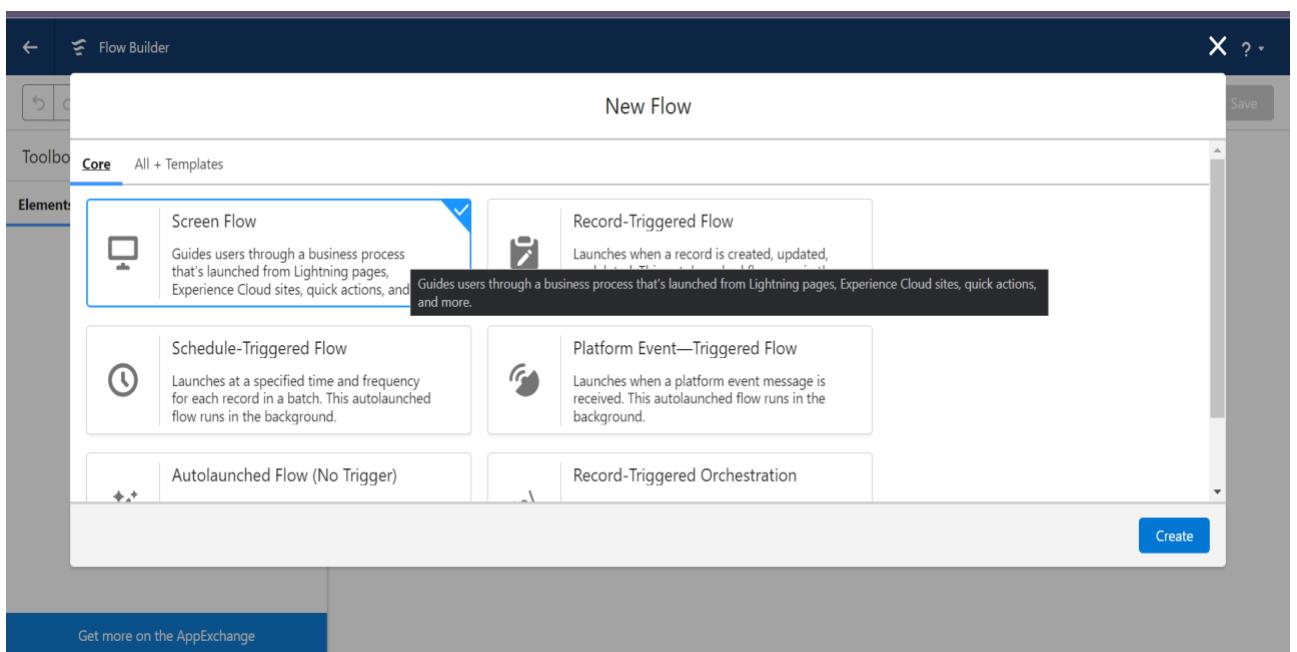
Flows in Salesforce, a flow is a tool that automates complex business processes. Simply put, it collects data and then does something with that data. Flow Builder is the declarative interface used to build individual flows. Flow Builder can be used to build code-like logic without using a programming language. Flows fall into five categories:

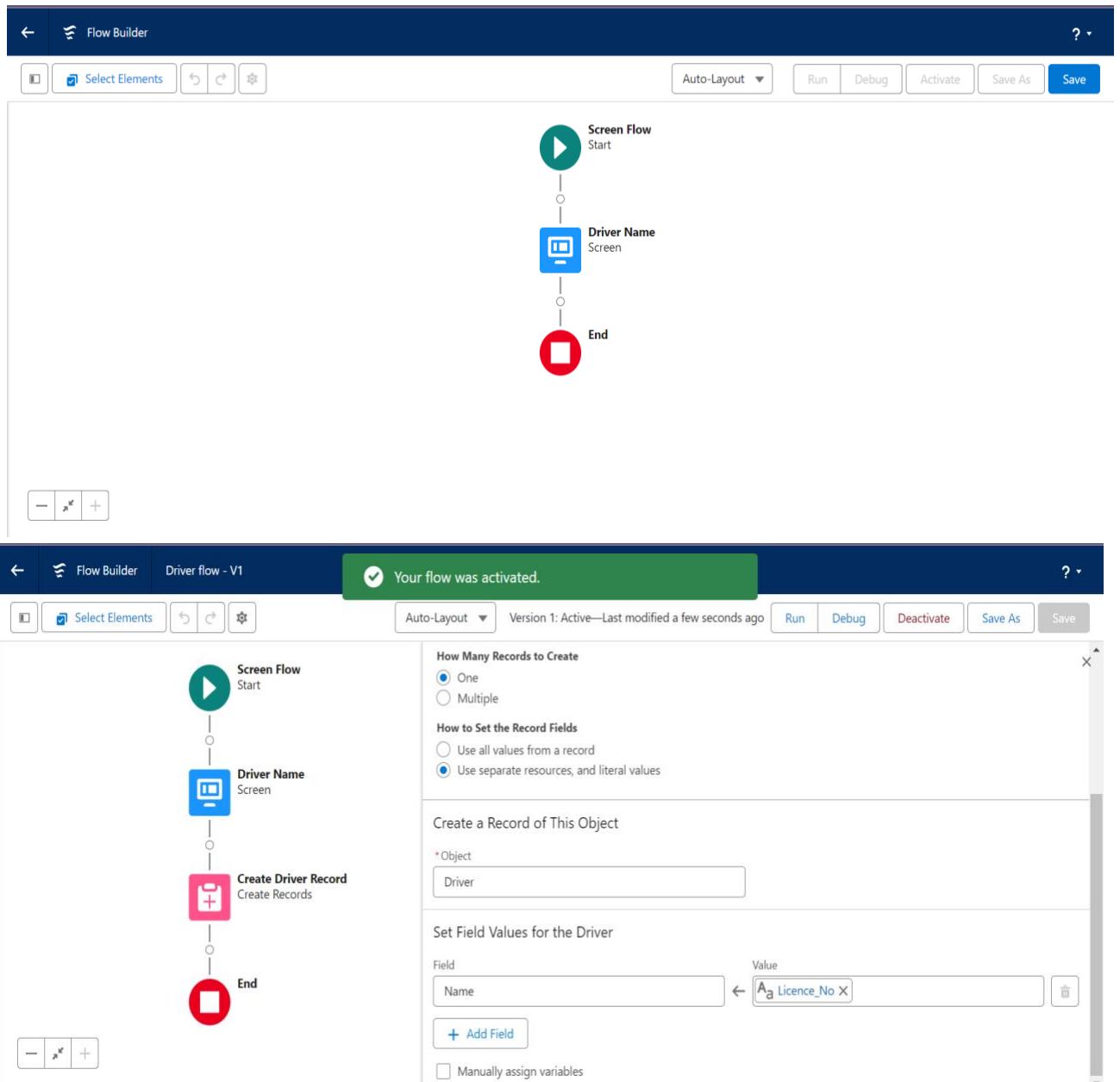
- 1.Screen Flows
- 2.App Page Setting

1.Creation Of Screen Flow

1. Click on Gear icon and select setup
2. In Quick find Box enter flow and select the flows
3. Click on New flow and Select Screen flow

4. It will open the canvas. Select (+)
5. Select the screen element from the drop down.
6. It will open the dialog box. Now give the label name and api name will be auto populated. These labels are for your screen Element.
7. Label:DriverInfo
8. API Name: Driver_Info (This field will be auto populated.)
9. In search Component type text and drag the text component to canvas and give the label and api Name
- 10.Label: Driver Name
- 11.API Name: Driver_Name (This field will be auto populated.)

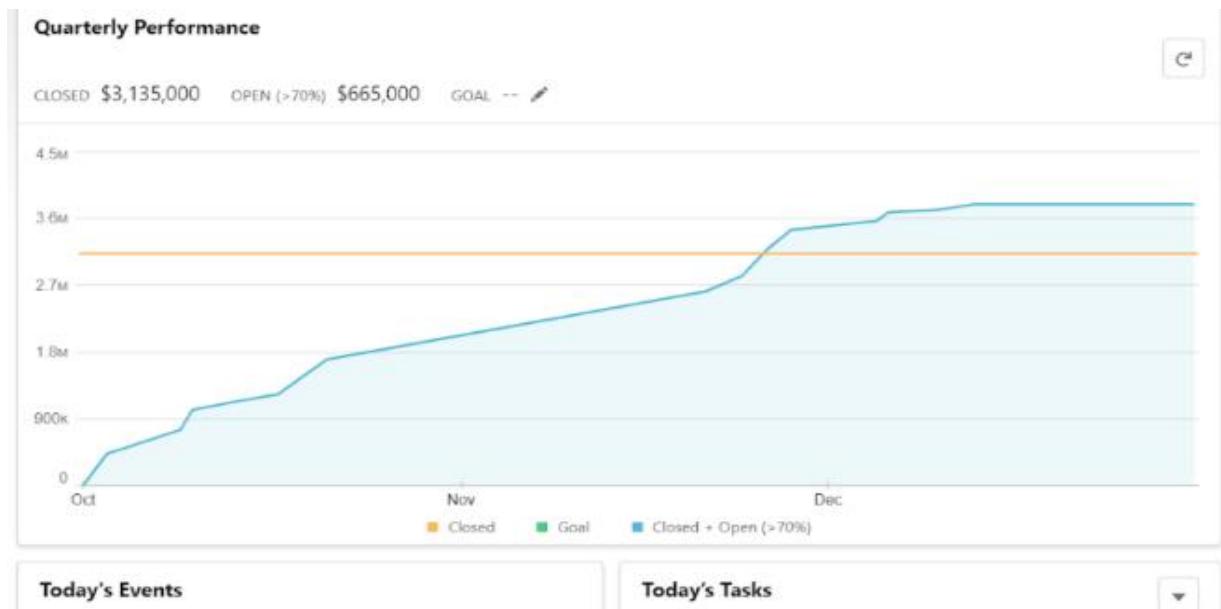




2.App Page Settings

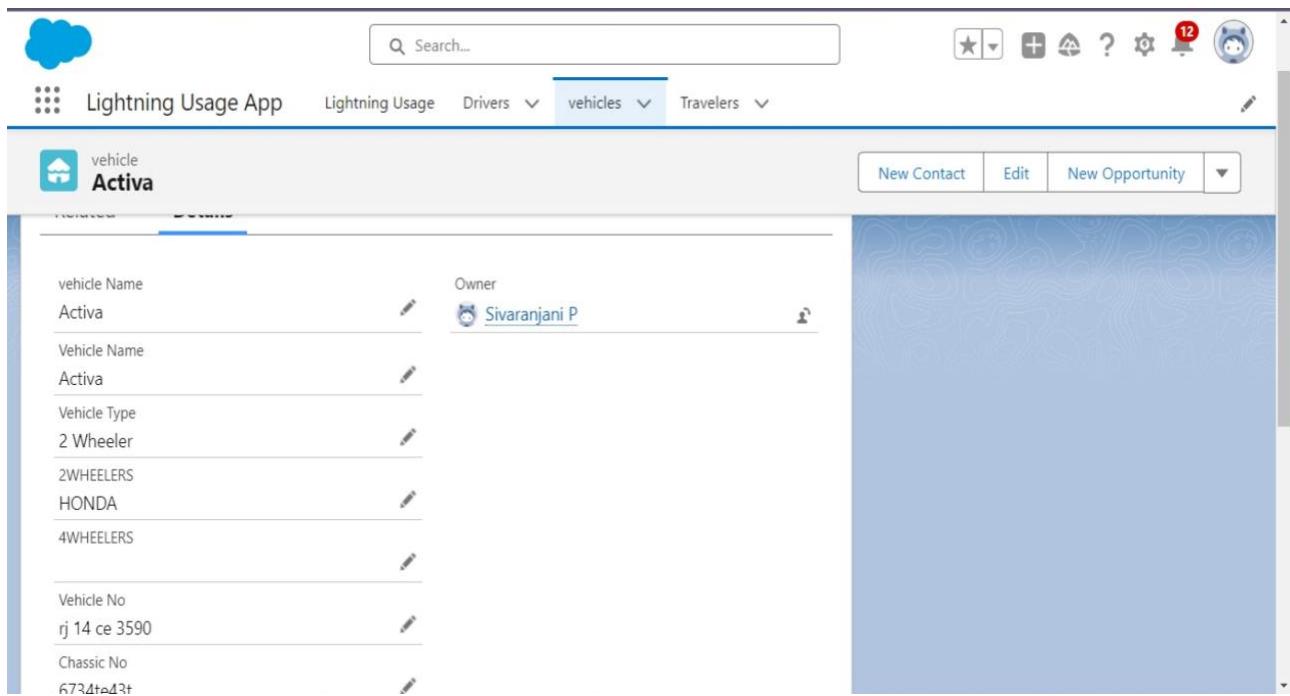
1. Click on the Gear icon and select set up
2. In Quick Find box. Type App Manager and select the App Manager
3. Select Vehicle Management and Click on drop down beside and select Edit
4. Select Utility Items and Click on Add Utility Items

5. Search for Flow and click on flow
6. Now Label: Driver Flow
7. Scroll Down in Flow Select Driver Screen Flow
8. Click on Save
9. Now Go to App Builder and Select Vehicle Management App



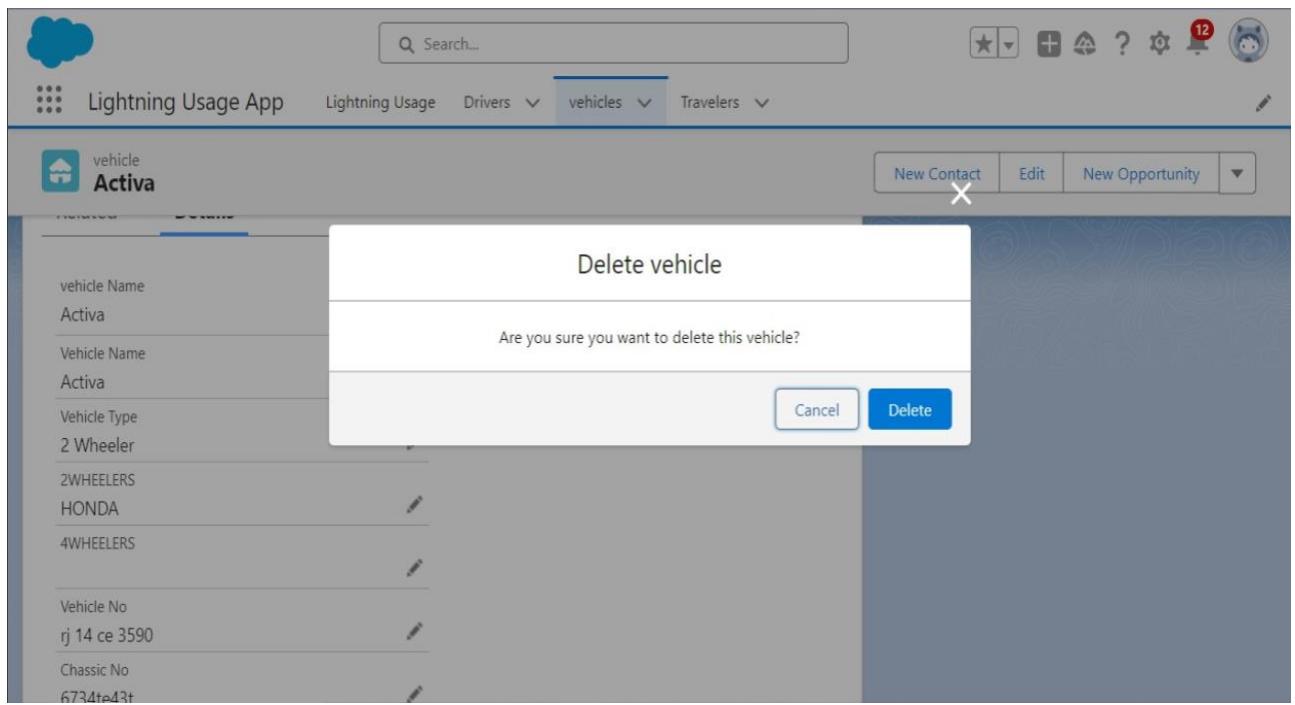
11)View Record (Vehicle):

- 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



12)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.



13) Creation of Report

1. Click on the App Launcher and then select Object Manager.
2. Click on the object manager tab just beside the home tab.
3. Select the Report that is above the page in Vehicle Management Page.
4. Click new and create the new report for the Vehicle Management
5. Report Name: New Opportunities Report
6. Click Save.

The screenshot shows the 'Create Report' dialog in the Salesforce interface. On the left, a sidebar titled 'Category' lists 'Recently Used' and 'All' (which is selected). Under 'All', there are categories for 'Accounts & Contacts', 'Opportunities', 'Customer Support', and 'Reports'. The main area is titled 'Select a Report Type' and contains a search bar with the query 'veh'. A table lists a single report type: 'Report Type Name' is 'vehicles' and 'Category' is 'Standard'. To the right, a panel titled 'Details' shows a summary for 'vehicles', including its icon, name, and status as a 'Standard Report Type'. A 'Start Report' button is also present.

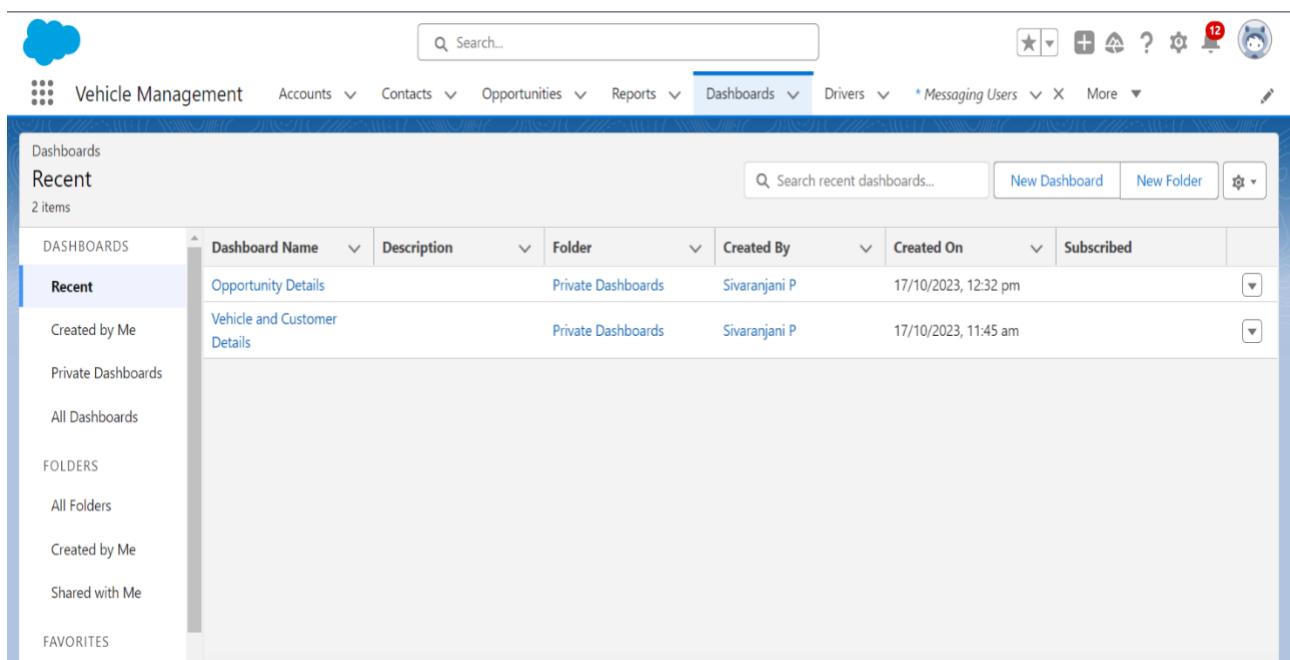
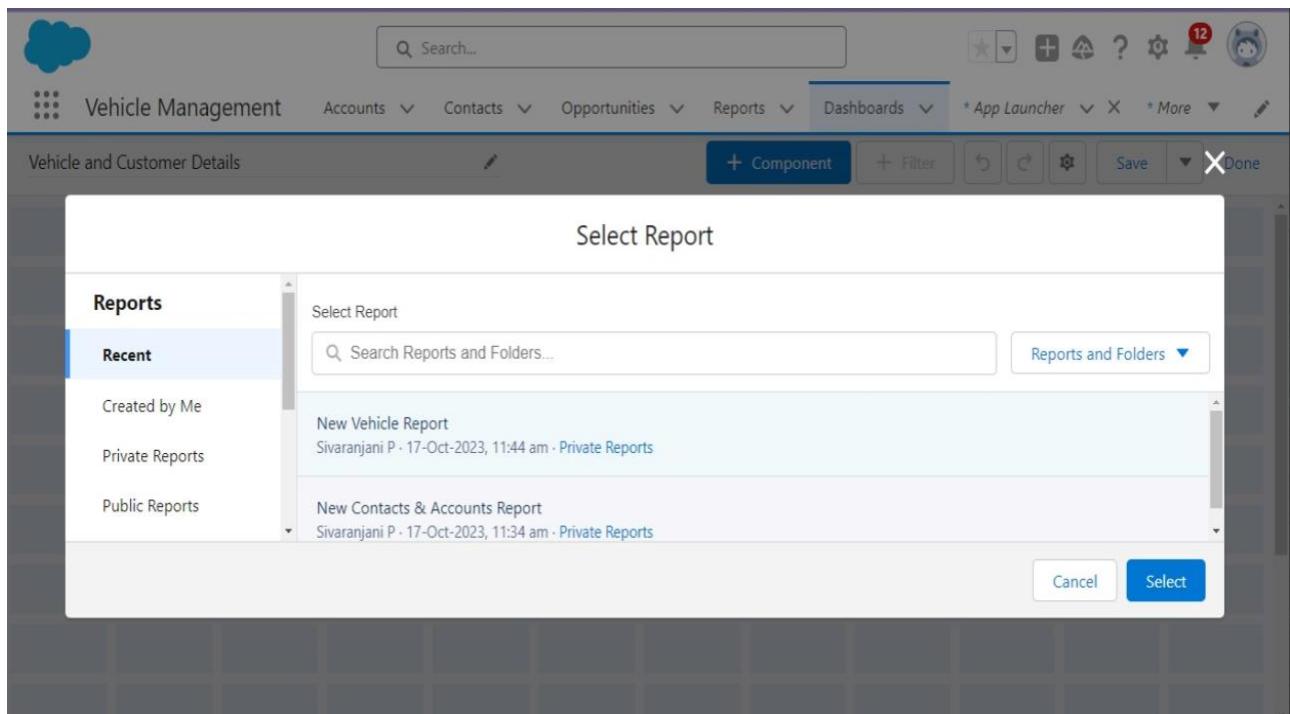
The screenshot shows the 'New Dashboard' dialog in the Salesforce interface. The title bar says 'New Dashboard'. The form includes fields for 'Name' (containing 'Vehicle and Customer Details'), 'Description' (empty), and 'Folder' (empty). At the bottom are 'Cancel' and 'Create' buttons. The background shows a grid-based dashboard design.

The screenshot shows the Salesforce interface for Vehicle Management. The top navigation bar includes tabs for Accounts, Contacts, Opportunities, Reports, Dashboards, Drivers, Messaging Users, More, and a search bar. The Reports tab is selected. On the left, a sidebar titled 'Recent' lists categories like Reports, Folders, and Shared with Me. The main content area displays a table of recent reports with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed status. Three reports are listed:

Report Name	Description	Folder	Created By	Created On	Subscribed
New Opportunities Report	Private Reports	Sivaranjani P	17/10/2023, 12:29 pm	<input type="checkbox"/>	
New Vehicle Report	Private Reports	Sivaranjani P	17/10/2023, 11:44 am	<input type="checkbox"/>	
New Contacts & Accounts Report	Private Reports	Sivaranjani P	17/10/2023, 11:34 am	<input type="checkbox"/>	

14)Creation of Dashboard

- 1.Click on the App Launcher and then select Object Manager.
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4. Click new and create the new dashboard for the Vehicle Management
- 5.Dashboard Name: Vehicle and customer details
- 6.Click Save.



15)Report Viewing

- 1.Click on App Launcher on left side of screen.
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- 3.Click on Reports Tab.

4.Click on Opportunity Details report and see records

The screenshot shows the Salesforce Reports page. On the left, there's a sidebar with categories like 'Reports', 'Recent' (which is selected), 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'Folders', 'All Folders', 'Created by Me', and 'Shared with Me'. The main area displays a table with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. Three recent reports are listed:

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New Contacts & Accounts Report	Private Reports	Sivaranjani P	17/10/2023, 11:34 am	<input type="checkbox"/>	

The screenshot shows the 'New Opportunities Report' detail view. At the top, it says 'Report: Opportunities' and 'New Opportunities Report'. Below that, it shows 'Total Records' and the number '1'. A table is displayed with columns: Created Date, Close Date, Opportunity Owner, and Opportunity Name. One record is shown: '01/10/2023 (1)' under Created Date, '03/10/2023 (1)' under Close Date, 'Sivaranjani P' under Opportunity Owner, and 'Edge Emergency Generator' under Opportunity Name. There are also 'Subtotal' and 'Total (1)' rows. At the bottom, there are checkboxes for 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total'.

16)Dashboard Viewing

- 1.Click on App Launcher on left side of screen.
- 2.Search Vehicle Management System & click on it.

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4.Click on Opportunity and Dashboard and see graph view of records

The screenshot shows the Salesforce interface for 'Vehicle Management'. The top navigation bar includes links for Accounts, Contacts, Opportunities, Reports, Dashboards (which is currently selected), Drivers, Vehicles, Travelers, and More. A search bar at the top right is labeled 'Search...'. Below the navigation is a sidebar with sections for Dashboards, Recent (3 items), Folders (All Folders, Created by Me, Shared with Me), and Favorites. The main content area displays a table of dashboards:

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
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Created by Me	Opportunity Details		Private Dashboards	Sivaranjani P	17/10/2023, 12:32 pm	<input type="checkbox"/>
Private Dashboards	Vehicle and Customer Details		Private Dashboards	Sivaranjani P	17/10/2023, 11:45 am	<input type="checkbox"/>
All Dashboards						

The screenshot shows a detailed view of a dashboard titled 'New Opportunities Report'. The title bar includes a back arrow, a refresh icon, and a close button (X). The main content area features a chart titled 'Record Count' showing the count of opportunities between two dates. The x-axis is labeled 'Record Count' and ranges from 0 to 1. The y-axis has two labels: 'Close Date' and 'Created Date'. A single blue bar represents the record count for the period from 01/10/2023 to 03/10/2023, with a value of 1. Navigation arrows are available to move through other dates. At the bottom of the chart area, there is a link 'View Report (New Opportunities Report)'. The left sidebar of the dashboard lists 'New Opportunities' and 'New Customers'.

GitHub & Project Video Demo Link

GitHub Link:

<https://github.com/jo-canva/naanmudhalvan-2>

Project Video Demo Link:

<https://drive.google.com/file/d/1ouUiqHCLZacEYYBcJbQj7tnohF1yKa-z/view?usp=sharing>

17) Demo link

https://drive.google.com/file/d/1FN8ltMbLl_2uTnhM6Y9mdrmYecGSqtkR/view?usp=drivesdk

18) GitHub link

<https://github.com/Kdvaishu25102003/NaanMudhalvan-SFD-NM2023TMID02929-MECW>

