VEHICLE MANAGEMENT SYSTEM USING SALESFORCE

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VEHICLE MANAGEMENT SYSTEM USING SALESFORCE

INTRODUCTION:

Salesforce is your customer success platform, designed to help you sell, service, market,

analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard

products and features, you can manage relationships with prospects and customers,

collaborate and engage with employees and partners, and store your data securely in the

cloud.

1.1 Overview:

Vehicle management system have become increasingly, important over the world, due to both to demands for increasingly flexibility and capability. A vehicle management system is a powerful tool, which can be implemented to improve fleet efficiency.
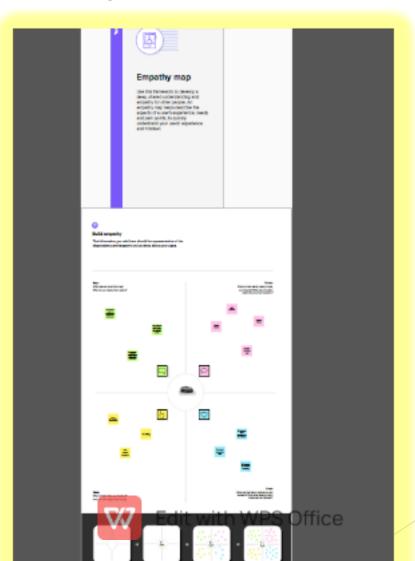Its allows a business to quickly and clearly keep track of vehicle status and other important information.

The vehicle management software fully customizable to suit the needs of your business. Its allows you to access the information from anywhere in the world at any given time, as long as you have internet access.
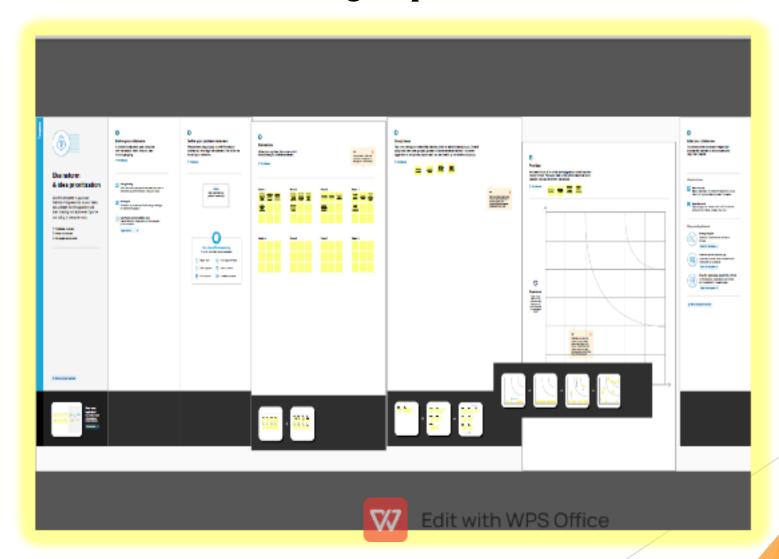
2.purpose definition &design thinking:

2.1 Empathy Map:

2.2 Ideation & Brainstorming Map

3.2 Activity& Screenshot:
Activity 1:
Creating Developer Account
Creating a developer org in salesforce.
1. Go to **developers.salesforce.com/**
2. Click on sign up.
3. On the sign up form, enter the following details :
a. First name & Last name
a. Email
b. Role : Developer

c. Company : College Name
d. County : India
e. Postal Code : pin code
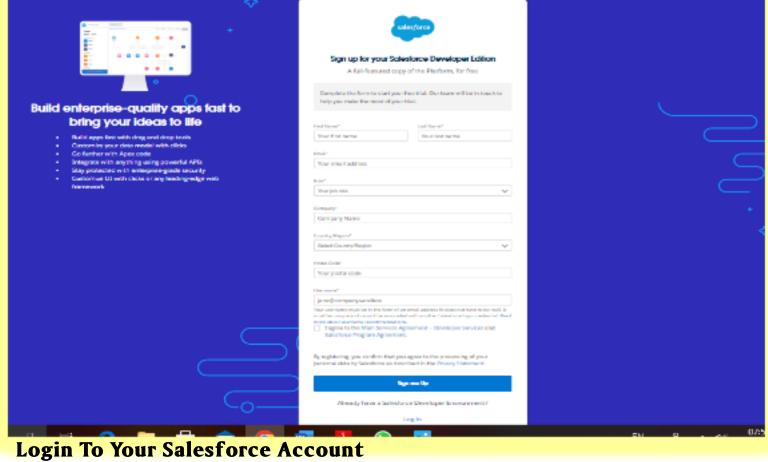f. Username : should be a combination of your name and company
This need not be an actual email id, you can give anything in the format :
username@organization.com
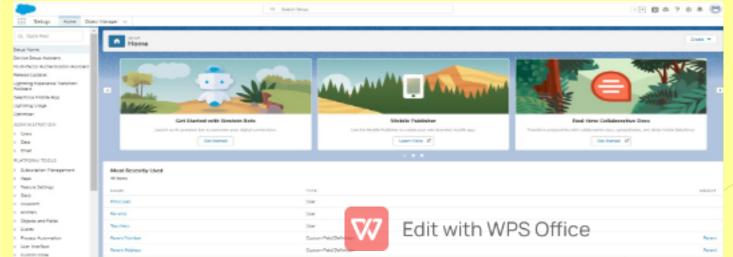
Login To Your Salesforce Account
1.Go to salesforce.com and click on login.
2.Enter the username and password that you just created.
3.After login this is the home page which you will see.
Salesforce Login
htttps://login.salesforce.com

Milestone-2:Object

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:Vehicles,Drivers.
Activity 1:
To Create an object:
Creation of Objects for Vehicle Management, For this Vehicle Management we need to
create 2 objects i.eVehicles,Driver.
The below steps will assist you in creating those objects.
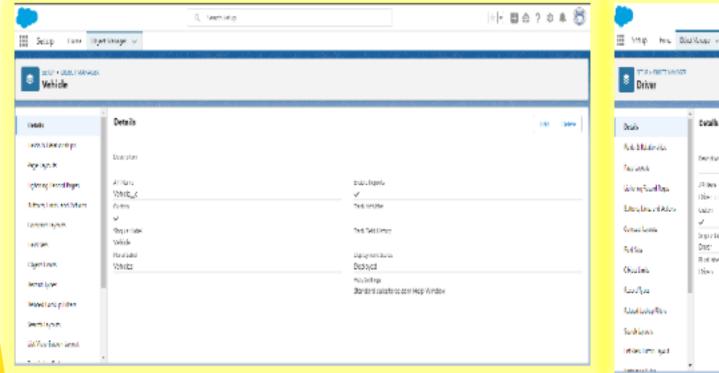● Click on the gear icon and then select Setup.
● Click on the object manager tab just beside the home tab.
● After the above steps, have a look on the extreme right you will find a Create
Dropdown click on that and select Custom Object.
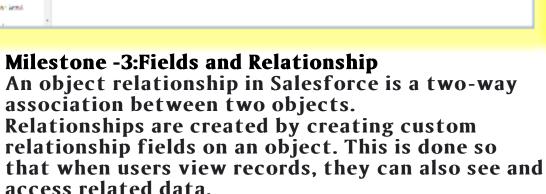
- **Creation of Vehicle Object**
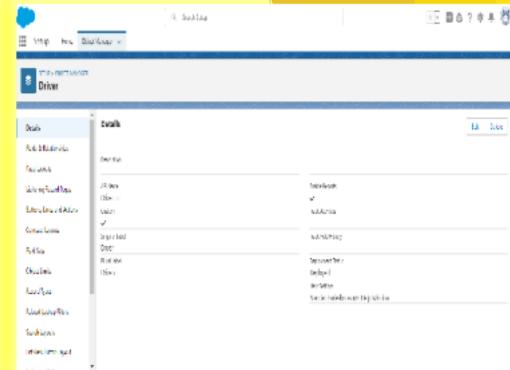
On the Custom Object Definition page, create the object as follows:
- **Label: Vehicle**
- **Plural Label: Vehicles**
- **Record Name: Vehicle Name**
- **Check the Allow Reports checkbox**
- **Check the Allow Search checkbox**
- **Click Save**

- **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.**

Milestone -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.
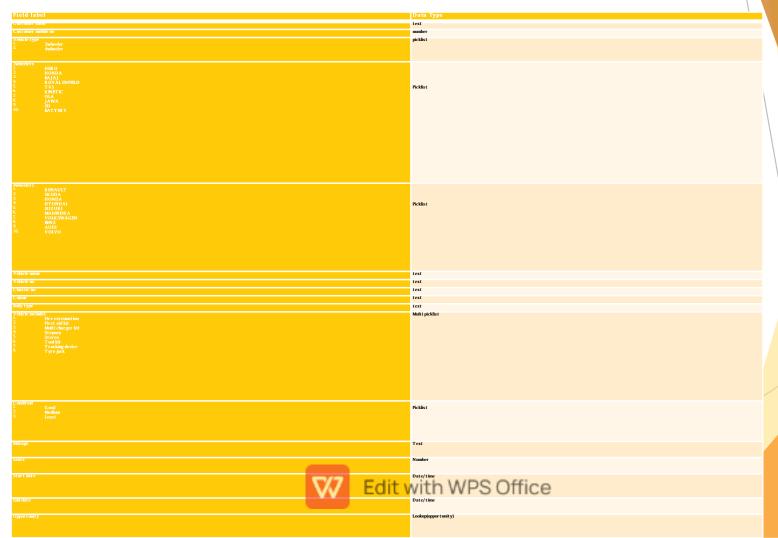
Activity-1:
Creation of fields:
Fields in Vehicles objects follow below data types:

Field label	Data Type
Customer name	text
Customer mobile no	number
Vehicle type 1. 2wheeler 2. 4wheeler	picklist
2wheelers 1. HERO 2. HONDA 3. BAJAJ 4. ROYAL ENFIELD 5. TVS 6. KINETIC 7. OLA 8. JAWA 9. SD 10. BATTERY	Picklist
4wheelers 1. RENAULT 2. SKODA 3. HONDA 4. HYUNDAI 5. SUZUKI 6. MAHINDRA 7. VOLKSWAGEN 8. BENZ 9. AUDI 10. VOLVO	Picklist
Vehicle name	text
Vehicle no	text
Chassis no	text
Colour	text
Body type	text
Vehicle includes 1. Fire extenution 2. First aid kit 3. Multi charger kit 4. Stepney 5. Stereo 6. Tool kit 7. Tracking device 8. Tyre jack	Multi picklist
condition 1. Good 2. Medium 3. Least	Picklist
Mileage	Text
Seats	Number
Start date	Date/time
End date	Date/time
Opportunity	Lookup(opportunity)

Activity-2:
Fields in Driver objects follow below data types:

Field	Data type
Driver name	Text
Licence no	Text
Mobile no	Number
Fair per hour	Text
Vehicle	Lookup(vehicle)

Activity-3:
Fields In Driver Object:
Create a dependency between these two picklists, so that when a Vehicle type is selected,
only respective 2Wheeler Brands are available in the 2Wheeler field,
Similarly for 4
wheelers.
The below steps will assist you in creating Field Dependencies.
● Click on the gear icon and then select Setup.
● Click on the object manager tab just beside the
home tab.
● After the above steps, Select Vehicles Object
● Now Select Fields and relationships from setup menu
of the vehicle object.
● Click Field Dependencies.
● Click New.
● Select Vehicle Type as the Controlling Field and
select 2wheelers as the Dependent
Field.
● Click Continue.
● Select the appropriate 2 wheelers Brands in each
column by double-clicking them.

● **2WHEELERS :**
i) HERO
ii)HONDA
iii)BAJAJ
iv)ROYAL ENFIELD
v)TVS
vi)KINETIC
vii)OLA
viii)JAWA
ix)SD
x)BATTERY

● **Click Include Values.**
● **Click Preview, then test the dependency by selecting different Vehicle Type and**
viewing the different Vehicles available for Vehicle Type.
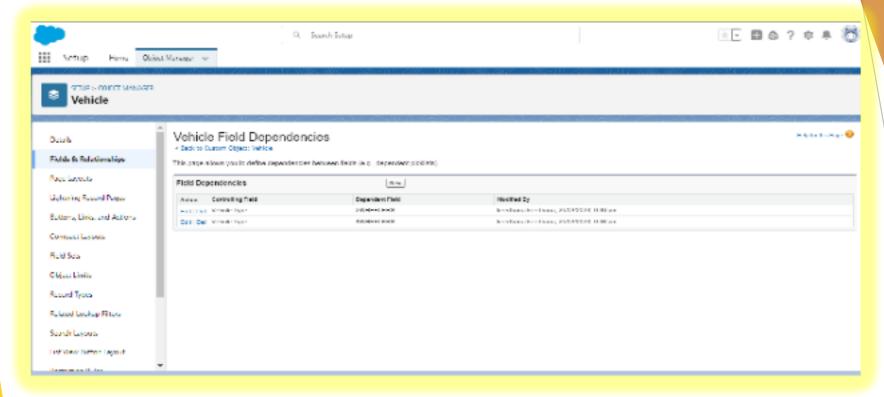● **Click Close to close the preview window.**
● **Click Save.**
Follow same steps for 4wheelers also
● **Vehicle Type as the Controlling Field and select 4wheelers as the Dependent Field.**
● **Click Continue.**
● **Select the appropriate 4wheelers Brands in each column by double-clicking them.**

● **4WHEELERS :**
 i) RENAULT
ii)SKODA
iii) HONDA
iv)HYUNDAI
 v)SUZUKI
 vi)MAHINDRA
 vii)VOLKSWAGEN
 viii)BENZ
 ix)AUDI
 x)VOLVO

● **Click Include Values.**
● **Click Preview, then test the dependency by selecting**
different Vehicle Type and
viewing the different Vehicles available for Vehicle Type.
● **Click Close to close the preview window.**

● **Click Save.**

Milestone-4:Lightning App
Apps in Salesforce are a group of tabs that help the
application function by working together
as a unit. It has a name, a logo, and a particular set
of tabs. The simplest app usually has just
two tabs.

Activity-1:

Create the Vehicle Management Construction 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,
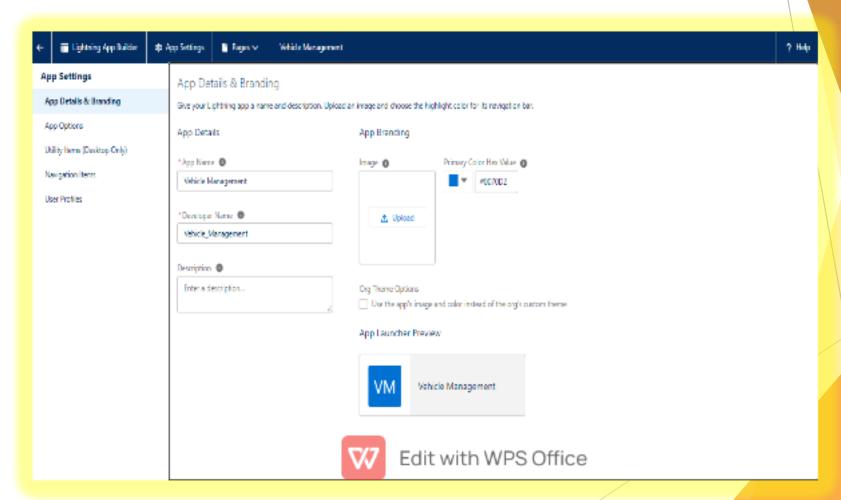Driver,Reports, and Dashboards and move them to
Selected Items. Click
Next.

● 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

Note:
1. App Launcher-Displays available apps.
2. App Name-Displays the current selected app.
3. Navigation menu-Displays the tabs available
inside the app.

Milestone-5: Profile

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

Activity 1:

Creating a Profiles: Now create a Vehicle Manager profile and set its object permissions.
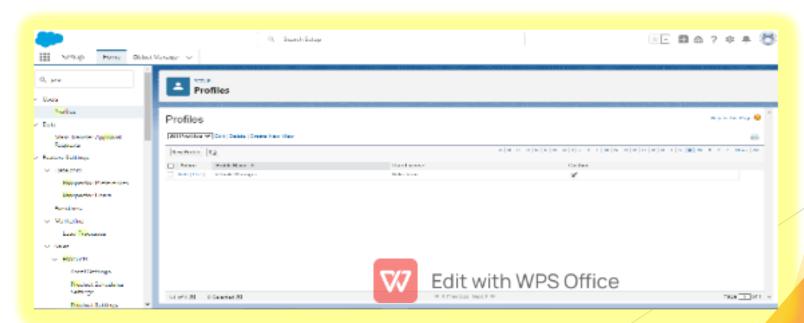
Creating a Profiles:

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 , Delete, View all and modify all
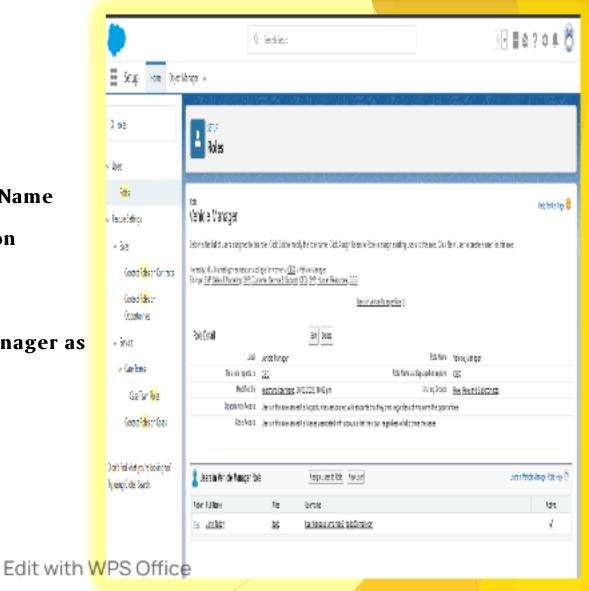**for Vehicle object and Drivers**
object.

To create a new profile:
Go to setup → type profiles in quick find box → click on profiles → clone the desired profile
(standard user is preferable) → enter profile name → save

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

Similarly create Two Roles under Vehicle Manager as Operator 1 And Operator 2 Roles
which will report to the Vehicle manager.
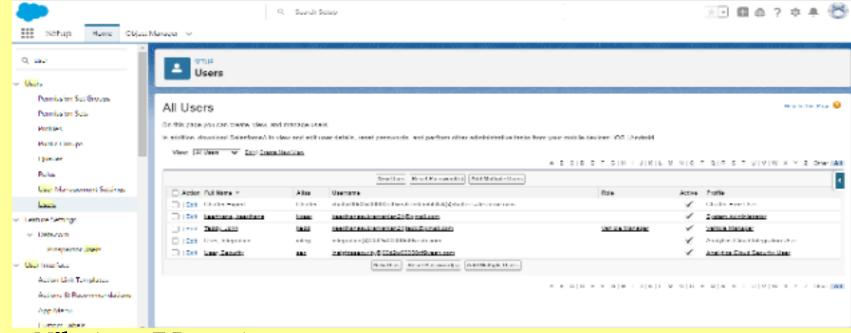
Milestone-6: Users

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

Activity 1:

Creating a Users:

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 Licence As salesforce.
6. Select a profile as Vehicle Manager.
7. Check Generate new password and notify the
user immediately to have the user's
login name and a temporary password emailed to
your email.

Milestone-7:Reports

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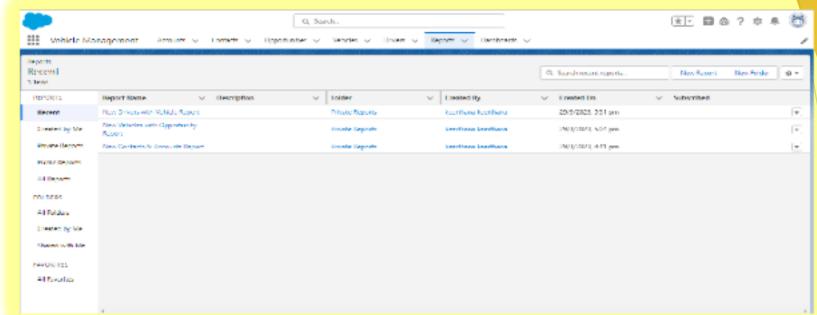read-only or read/write.

Activity 1:

Reports And Dashboards.

● Go to Reports and click New Report.

- Select the Accounts,Contacts and Vehicle report type and click Start Report.
- To begin filtering, click Filters.
- Click the Show Me standard filter and select My Contacts. Click Apply.
- Click on add columns add Vehicle:Vehicle name, Vehicle:Customer id, Vehicle:Customer name,Vehicle:Customer Number, Vehicle:Chassis Number.
- Click Save.
- Save your report as Vehicle and Customer Details and accept the auto-generated unique name.

Activity 2:
Dashboard:
1. Click the Dashboards tab.
2. Click New Dashboard.
3. Name the dashboard Vehicle and Customer
Details and click Create.
4. Click +Component.
5. Select the Supplies report and click Select.
6. Select the Vertical Bar Chart component and
click Add.
7. Click Save and then Done.
To create a report:
Go to the app → click on the reports tab

New Drivers with Vehicle Report

Driver: Driver	Vehicle: Vehic	Vehicle: Custon	Vehicle: Veh	Vehicle: Zill
Sharmila	Car	Tata	4 wheeler	–
Gnyanhini	Bike	Mahen	2 wheeler	ROS11 FM1

View Report (New Drivers with Vehicle Report)

New Vehicles with Opportunity Report

Vehicle: Ve	Opportunity: Opp	Oppor	Opportunity:	Opportunity: Type
Bike	Vehicle Manager	₹7.00n	Vehicle Manager	Existing Customer
Car	Driver Manager	₹8.00n	Driver Manager	Existing Customer

View Report (New Vehicles with Opportunity Report)

New Contacts & Accounts Report

Salutation	First Na	Last Na	Account Nam	Mailing Street
Ms.	Keertha na	Keerth ana	Driver Manager	71 south masi street,theni
Ms.	kamala	kamala	Vehicle Manager	672 west masi street,madurai

View Report (New Contacts & Accounts Report)

7 Conclusion:

The developed system has been successfully deployed on a web-site. After connected to the system through the Internet, some feedbacks are found. This system's workflow of the front-end is user friendly and efficient enough to work.

Online vehicle reservation system improves the existing system since we are in computerized world. With this new system is mandatory, it enables the user of the system (client, employee, System administrator) to reserve vehicles online and this reduces the wasting of time of the clients looking for where to go, increase the safety the property.