



Vehicle Management System Using Salesforce



NAAN MUDHALVAN PROJECT REPORT

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in partial fulfilment for the award of the degree of

BACHELOR OF ENGINEERING

in

**COMPUTER SCIENCE AND
ENGINEERING**

**AVS ENGINEERING COLLEGE,
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BONAFIDE CERTIFICATE

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ACKNOWLEDGEMENT

We would like to express our gratitude and appreciation to all those who gave us the possibility to complete this report. We would like to acknowledge with much appreciation to our honorable Chairman, **Shri.K.KAILASAM**. Secretary, **Shri. K.RAJAVINAYAKAM, MBA.** and also, to our Correspondent, **Shri. K.SENTHIL KUMAR, B.Tech** for providing all necessary facilities for the successful completion of the project.

We have immense pleasure in expressing our gratitude to our beloved Principal, **Dr. A. SRINIVASAN, M.E, Ph.D.,** for allowing us to have extensive use of our college facilities to do this project. It gives us a great sense of pleasure in expressing our gratefulness to our beloved Vice Principal's, **Dr. R. VISWANATHAN, M.E., Ph.D.,** and **Dr. D.R. JOSHUA, M.E., Ph.D.,** for their professional guidance in scheduling the project work to complete ontime.

We express our heartiest gratitude to **Dr. M. VILASINI M.E, Ph.D.,** Dean R&D and Head of the Department **Prof. V. MEENA, M.E.,** Computer Science and Engineering, for her guidance and encouragement throughout the Project Period. Also, we express our sincere and heartiest gratitude to class advisor and project coordinator **Prof. S. PRIYADHARSHINI, M.E.,** Assistant Professor and guide **Prof. S.. AROKIYANATHAN, M.E.,** Assistant Professor for their constant helps and creative ideas over the period of project work.

We specially thank all our Teaching and Non-Teaching Staff Members and Lab Technicians of the Department of Computer Science and Engineering for their consistent encouragement to do the project work with full interest and zeal. We pay our profound gratitude to God for his invisible vigilance and would like to thank our Parents for giving us support, encouragement and guidance throughout the course of our work.

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LIST OF ABBREVIATION

CRM	Customer Relationship Management
ESP	Email Service Provider
UI	User Interface
UX	User Experience
OWD	Org - Wide Default
CTA	Call To Action
CSV	Comma - Separated Values
SLA	Service Level Agreement
API	Application Programming Interface
SaaS	Software as a Service
PaaS	Platform as a Service

CHAPTER-1

PROJECT SPECIFICATION

1.1 Project Goal

Building an Employee Travel Approval Application for corporate use within the Salesforce platform involves a multi-faceted approach, starting with requirements gathering to define user roles and workflows. A well-structured data model captures essential information, and user-friendly interfaces for both employees and managers streamline the travel request and approval process. Workflow automation facilitates efficient routing and notifications, while integrations with external systems like expense management tools enhance data accuracy.

Robust reporting and analytics tools offer insights, and mobile app development ensures accessibility on-the-go. Security and compliance measures safeguard sensitive data, and thorough testing ensures a reliable application. Training and documentation support user adoption, and ongoing maintenance and improvements address evolving needs. Scalability planning and future enhancements cater to growing demands, while comprehensive documentation maintains transparency, ultimately streamlining the travel approval process and enhancing efficiency.

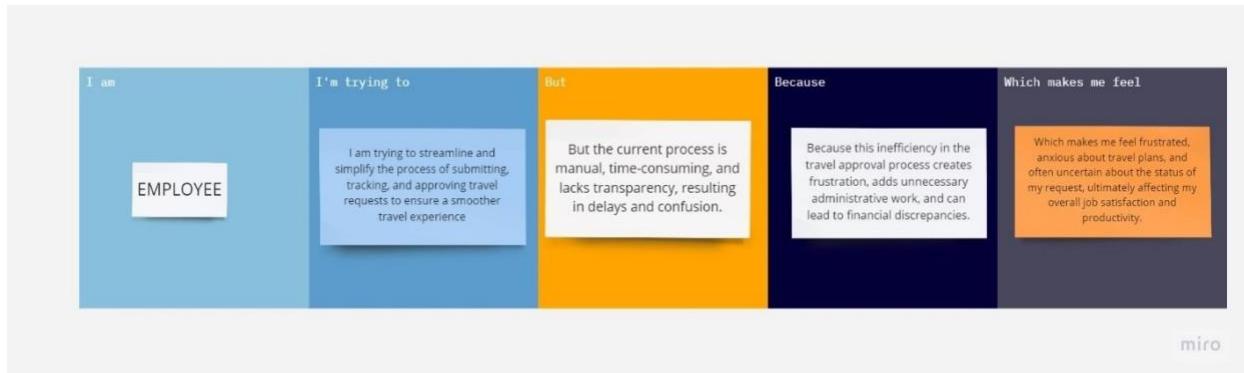
1.2 Project Scope

The Employee Travel Approval Application built in Salesforce serves a vital purpose in corporate travel management. Firstly, it streamlines and automates the often complex and time-consuming travel request and approval process. This efficiency results in reduced administrative burdens, faster approval times, and improved communication between employees and managers. With the ability to centralize all travel-related data, the application ensures data accuracy and compliance with corporate policies and regulatory requirements, contributing to better financial management and accountability.

The application fosters transparency throughout the travel approval workflow. Both employees and managers can easily track the status of travel requests, which enhances visibility into the process. By providing a clear overview of approval progress, it minimizes potential delays and miscommunication, ultimately improving the user experience and helping employees plan their travel more effectively.

The Employee Travel Approval Application in Salesforce offers robust security, ensuring that sensitive data is protected while also providing scalability for future growth. The built-in reporting and analytics tools offer insights into travel expenses and approval metrics, supporting data-driven decision-making. By facilitating on-the-go access through mobile app development, the application empowers employees and managers to manage travel efficiently and enhances the organization's overall travel management capabilities. In conclusion, the application optimizes corporate travel management by enhancing efficiency, transparency, and control, ultimately leading to cost savings and a more seamless user experience.

1.3 Problem Statement Definition

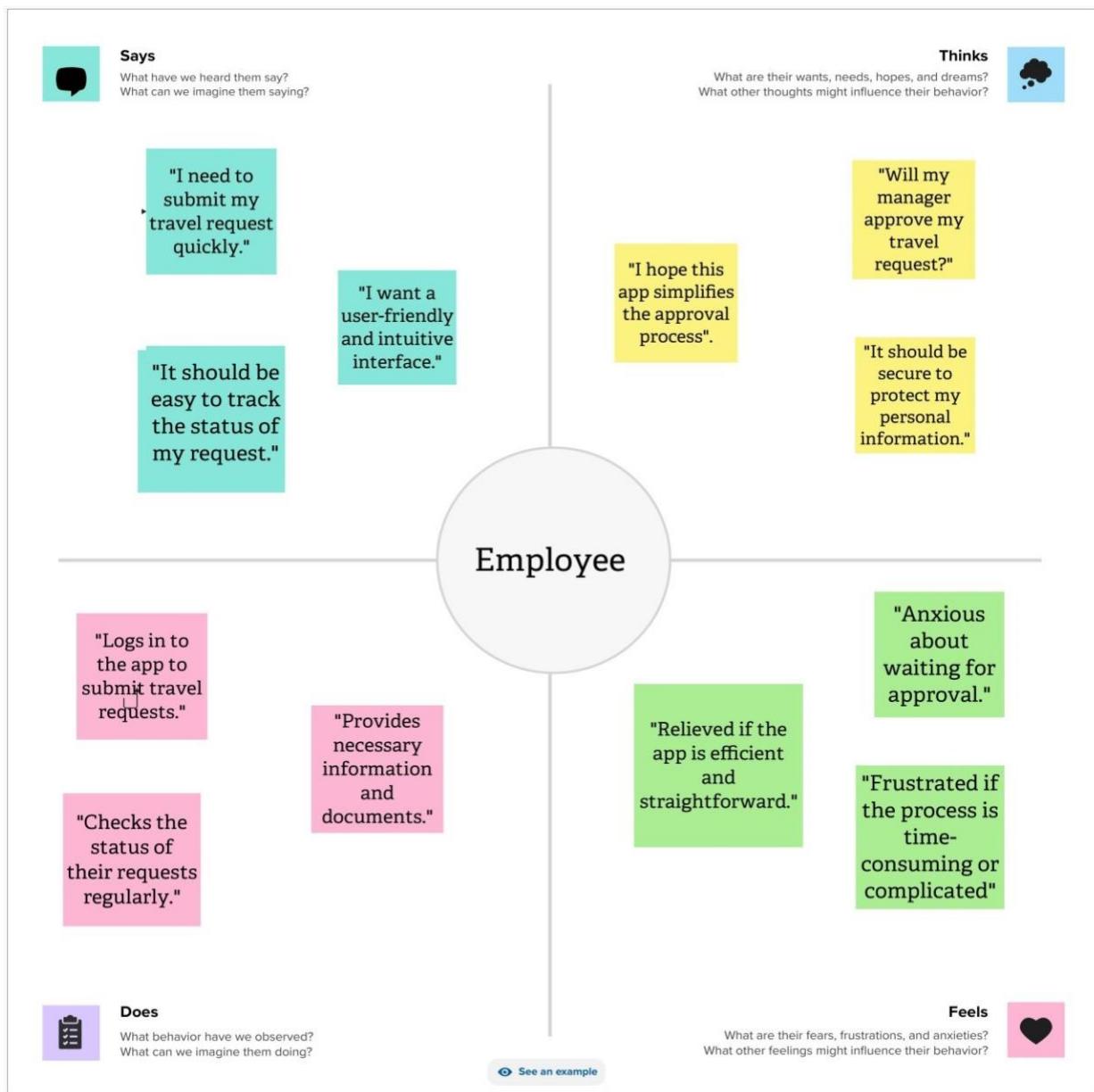


Problem Statement (PS)	I am (Employee)	I'm trying to	But	Because	Which makes me feel
PS	Employee	I am trying to streamline and simplify the process of submitting, tracking, and approving travel requests to ensure a smoother travel experience	But the current process is manual, time-consuming, and lacks transparency, resulting in delays and confusion.	Because this inefficiency in the travel approval process creates frustration, adds unnecessary administrative work, and can lead to financial discrepancies	Which makes me feel frustrated, anxious about travel plans, and often uncertain about the status of my request, ultimately affecting my overall job satisfaction and productivity

1.4 Empathy Map Canvas

An empathy map is a simple, easy-to-digest visual that captures knowledge about a user's behavior and attitudes.

It is a useful tool to help teams better understand their users. Creating an effective solution requires understanding the true problem and the person who is experiencing it. The exercise of creating the map helps participants consider things from the user's perspective along with his or her goals and challenges.



1.5 Ideation & Brainstorming

Brainstorming provides a free and open environment that encourages everyone within a team to participate in the creative thinking process that leads to problem solving. Prioritizing volume over value, out-of-the-box ideas are welcome and built upon, and all participants are encouraged to collaborate, helping each other develop a rich amount of creative solutions.

Step-1: Team Gathering, Collaboration and Select the Problem Statement:

Template

Brainstorm & idea prioritization

Use this template in your own brainstorming sessions so your team can unleash their imagination and start shaping concepts even if you're not sitting in the same room.

10 minutes to prepare
1 hour to collaborate
3-4 people recommended

1 Define your problem statement

What problem are you trying to solve? Frame your problem as a How Might We statement. This will be the focus of your brainstorm.

5 minutes

2 Before you collaborate

A little bit of preparation goes a long way with this session. Here's what you need to do to get going.

10 minutes

3 Team gathering

Define who should participate in the session and send an invite. Share relevant information or pre-work ahead.

4 Set the goal

Think about the problem you'll be focusing on solving in the brainstorming session.

5 Learn how to use the facilitation tools

Use the Facilitation Superpowers to run a happy and productive session.

Open article

Need some inspiration? See a finished version of this template and download your own.

Get example

Step-2: Brainstorm, Idea Listing and Grouping:

2 Brainstorm

Write down any ideas that come to mind that address your problem statement.

⌚ 10 minutes

Person 1

- User-Friendly Dashboard:** Create an intuitive dashboard for employees to submit travel requests and track their status.
- Manager Approval Workflow:**
 - Implement a workflow that allows managers to review and approve travel requests easily.

Person 2

- Travel Policy Integration:**
 - Include the company's travel policy within the app, ensuring employees are aware of guidelines and restrictions.
- Expense Management:**
 - Allow employees to submit expense reports related to their trips and attach receipts

Person 3

- Notification System:**
 - Implement a notification system to keep employees informed about the status of their travel requests.
- Notification System:**
 - Implement a notification system to keep employees informed about the status of their travel requests.

Person 4

- Real-Time Currency Conversion:**
 - Provide a currency conversion feature to help employees manage expenses in different currencies.
- Analytics and Reporting:**
 - Generate reports for corporate administrators to analyze travel patterns and expenses.

3 Group ideas

Take turns sharing your ideas while clustering similar or related notes as you go. Once all sticky notes have been grouped, give each cluster a sentence-like label. If a cluster is bigger than six sticky notes, try and see if you can break it up into smaller sub-groups.

⌚ 20 minutes

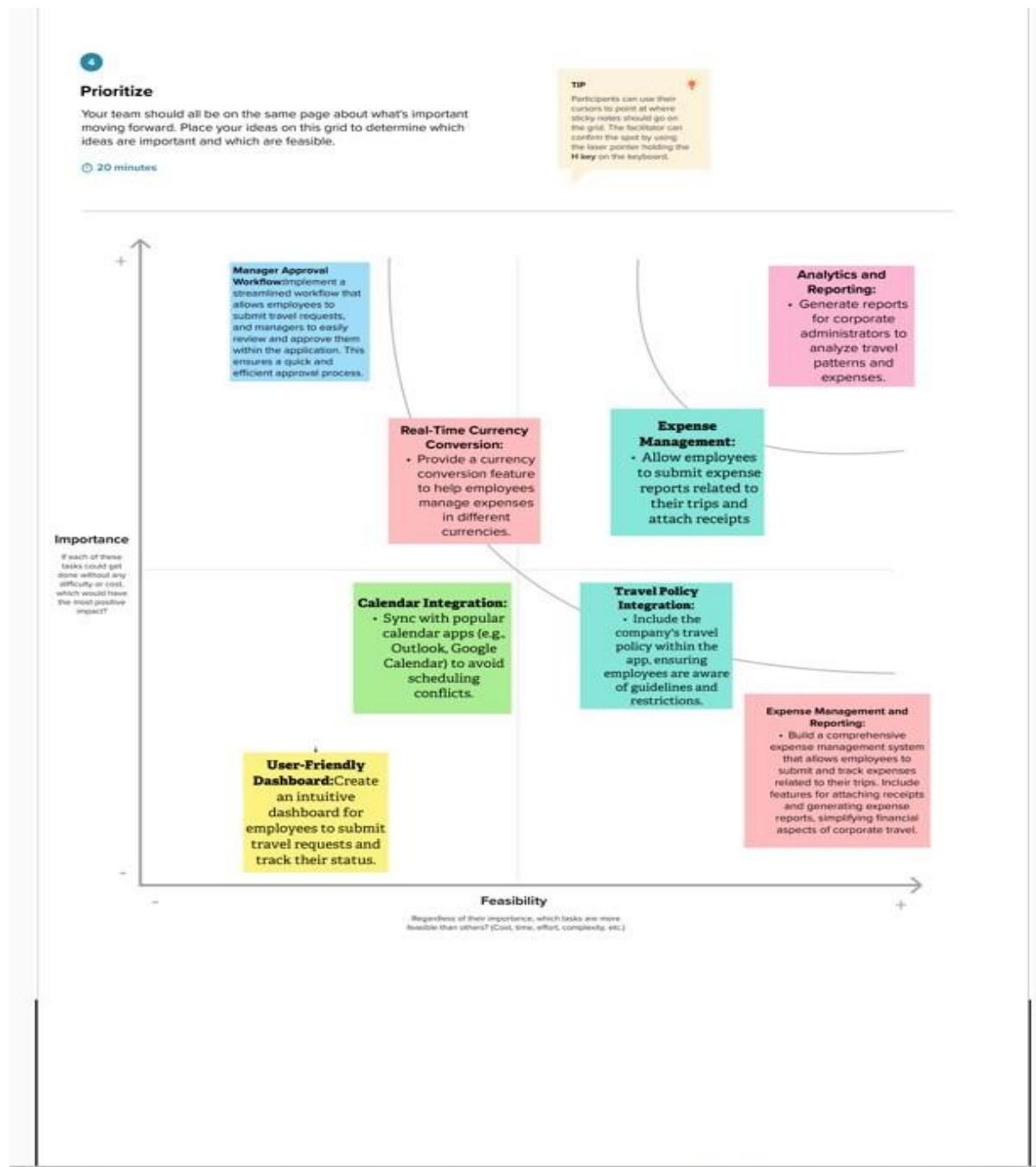
Manager Approval

Manager Approval Workflow: Implement a streamlined workflow that allows employees to submit travel requests, and managers to easily review and approve them within the application. This ensures a quick and efficient approval process.

Expense Management and Reporting:

- Build a comprehensive expense management system that allows employees to submit and track expenses related to their trips. Include features for attaching receipts and generating expense reports, simplifying financial aspects of corporate travel.

Step-3: Idea Prioritization:



1.6 Proposed Solution

S. No	Parameter	Description
1.	Problem Statement (Problem to be solved)	<p>Corporates often grapple with inefficient and manual travel approval processes that involve paperwork and a lack of transparency. These outdated methods lead to delays, increased administrative work, and potential compliance issues. The process is a source of stress for employees who require timely approvals to plan their business trips effectively, and it leaves them dissatisfied with the process. Managers, on the other hand, struggle to review and manage a high volume of travel requests while ensuring compliance. The absence of transparency leads to bottlenecks and a lack of visibility, leaving them overwhelmed and frustrated.</p>
2.	Idea / Solution description	<p>Our proposed solution is to develop an Employee Travel Approval Application within Salesforce, offering automation and centralization. The application will provide a user-friendly and automated system that allows employees to submit travel requests seamlessly. Managers will be able to review and approve them efficiently, while the system offers real-time tracking of request statuses. It will also include integration with external systems for expense management, robust security measures, mobile accessibility and analytics tools for data-driven decision-making. The benefits include reduced administrative burdens, improved communication, cost control, and better compliance with corporate policies and regulations.</p>

3.	Novelty / Uniqueness	<p>What sets our solution apart is the innovative use of Salesforce, a highly customizable and powerful platform, to streamline corporate travel management. The automation of approval workflows and integration with external systems will significantly reduce manual work and errors. The mobile app component will provide users with the flexibility and convenience of on-the-go access. Furthermore, the incorporation of robust reporting and analytics tools will enable data-driven decision-making and offer insights into travel expenses, setting our solution apart from conventional methods.</p>
4.	Social Impact / Customer Satisfaction	<p>Our application will have a substantial social impact by enhancing the user experience in corporate travel management. Employees and managers will benefit from a smoother, more transparent, and efficient travel approval process, reducing frustration and uncertainty. The streamlined process will free up time and resources for more strategic tasks, thereby improving overall workforce productivity. Data-driven decision-making will lead to better cost management, making it easier to control expenses and ensuring financial compliance. The application will also guarantee compliance with corporate policies and regulatory requirements, reducing risks and ensuring data security. Lastly, by optimizing travel planning, our solution can contribute to a more sustainable approach to business travel, aligning with corporate sustainability goals.</p>

1.7 Functional & Technical Requirements

1.7.1 Functional Requirements

FR No.	Functional Requirement (Epic)	Sub Requirement (Story / Sub-Task)
FR-1	User Management	<p>User Registration: Allow employees to register and log into the system.</p> <p>User Roles: Define roles (employees, managers, travel administrators) with different permissions.</p> <p>User Profiles: Capture and manage user profiles, including contact details.</p>
FR-2	Travel Request Submission	<p>Travel Request Form: Provide an intuitive form for employees to submit travel requests.</p> <p>Expense Entry: Allow users to enter estimated expenses, including flights, accommodation, meals, and incidentals.</p> <p>Travel Dates: Specify departure and return dates, including the option for flexible schedules.</p> <p>Attachments: Enable the attachment of supporting documents, such as itineraries or conference detail</p>
FR-3	Approval workflow	<p>Workflow Automation: Implement an automated approval process with defined workflows.</p> <p>Manager Assignment: Automatically route requests to the appropriate manager based on criteria like department or project.</p> <p>Notifications: Send notifications to managers and employees at various stages of the approval process.</p> <p>Delegation: Allow managers to delegate their approval authority when they are unavailable.</p>
FR-4	Approval Management	<p>Manager Dashboard: Provide managers with a dashboard to view and manage pending travel requests.</p> <p>Request Review: Allow managers to review travel details, expense estimates, and supporting documents.</p> <p>Approval/Rejection: Enable managers to approve or reject requests with comments.</p> <p>Escalation: Implement escalation processes for unattended requests or those exceeding certain thresholds</p>

FR-5	Expense Tracking	<p>Expense Tracking: Record actual expenses incurred during the trip.</p> <p>Receipt Upload: Allow users to upload expense receipts for verification.</p> <p>Expense Categories: Categorize expenses (e.g., transportation, lodging, meals) for reporting.</p> <p>Expense Reconciliation: Compare estimated and actual expenses for cost control.</p>
FR-6	Reporting and Analytics	<p>Reporting Tools: Develop custom reports and dashboards to monitor travel request status and expenses.</p> <p>Analytics: Implement data analytics for insights into travel patterns, expenses, and approval efficiency.</p> <p>Export: Allow users to export reports for offline use or sharing</p>

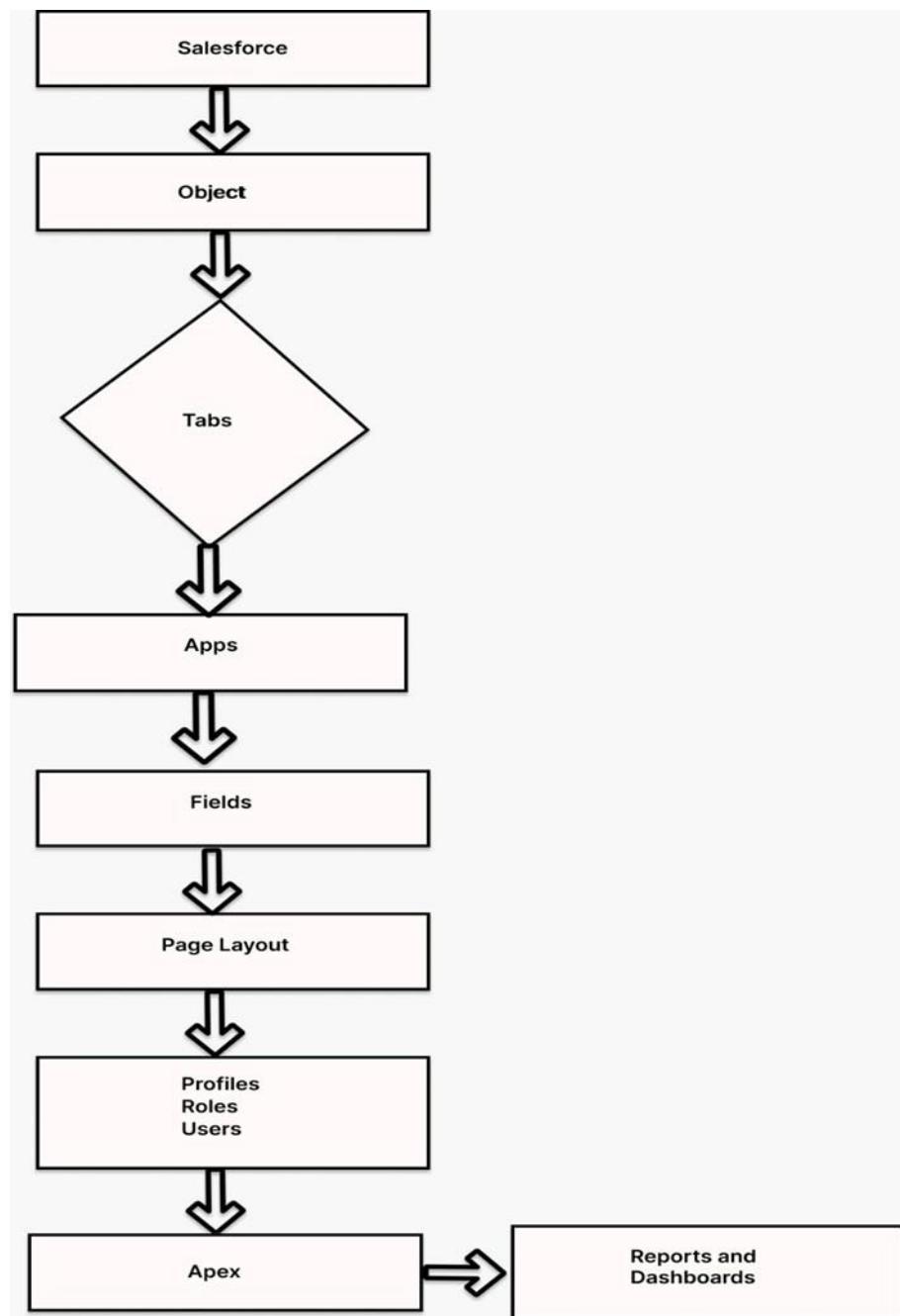
1.7.2 Technical Requirements

TR No.	Technical Requirement	Description
TR-1	Salesforce Environment	Utilize Salesforce's Enterprise or Unlimited edition to ensure scalability and access to advanced features.
TR-2	Development language	Develop using Salesforce's proprietary programming language, Apex, for server-side logic.
TR-3	Security	<ul style="list-style-type: none"> Implement role-based access control (RBAC) to control who can access and modify data. Encrypt sensitive data both in transit and at rest. Utilize Salesforce Shield for enhanced security, including event monitoring and field-level encryption.
TR-4	Integration	<ul style="list-style-type: none"> Use REST and SOAP APIs for integration with external systems, such as finance and expense management tools. Implement Single Sign-On (SSO) solutions for seamless and secure access.
TR-5	Customization	Allow administrators to customize and configure the application, including approval workflows, fields, and user profiles.
TR-6	Mobile Accessibility	<ul style="list-style-type: none"> Ensure that the application is accessible via the Salesforce mobile app for on-the-go request submission and tracking. Develop a custom mobile app using Salesforce Mobile SDK for more tailored mobile functionality.

1.8 Project Road Map

1.8.1 Data Flow Diagram

A Data Flow Diagram (DFD) is a traditional visual representation of the information flows within a system. A neat and clear DFD can depict the right amount of the system requirement graphically. It shows how data enters and leaves the system, what changes the information, and where data is stored.



1.8.2 Technical Architecture

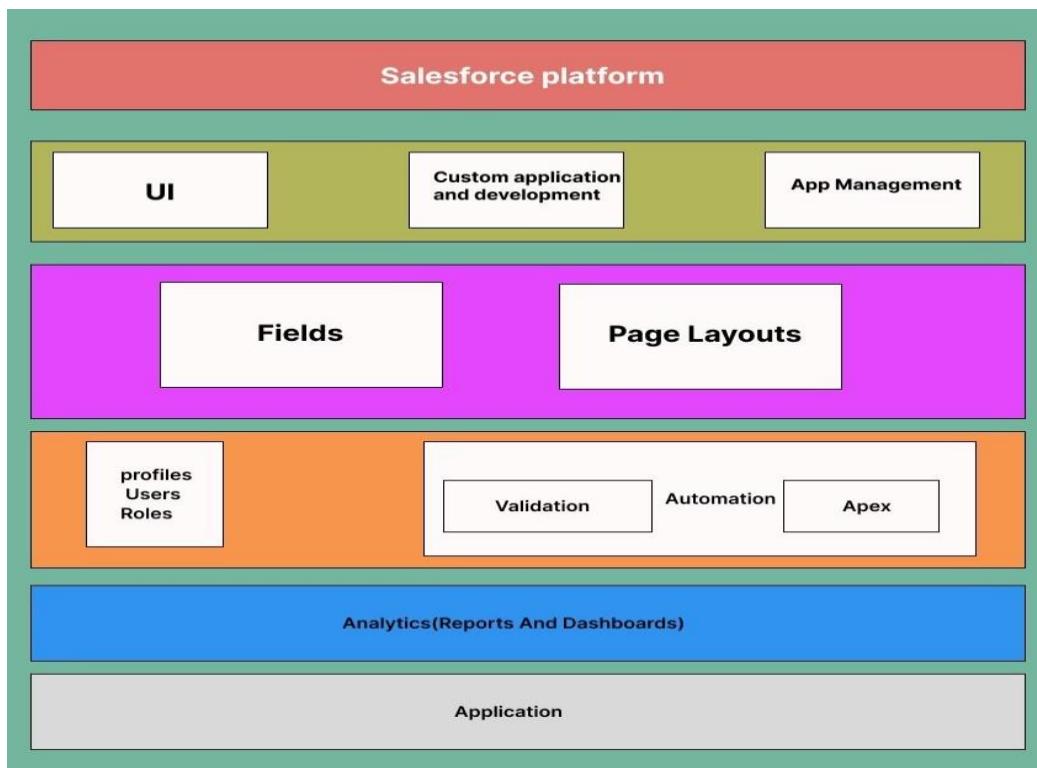


TABLE-1: Component and Technologies:

S.No	Component	Description	Technology
1.	User Interface	<p>Lightning Components: Use Salesforce Lightning components to design the user interface for employees, managers, and administrators.</p> <p>Custom Pages: Create custom Visualforce pages for more tailored and complex UI elements</p>	Salesforce
2.	Data Model	<p>Custom Objects: Define custom objects in Salesforce to represent entities like travel requests, expenses, and approvals.</p> <p>Master-Detail and Lookup Relationships: Establish relationships between objects to maintain data integrity.</p> <p>Custom Fields: Create custom fields to capture specific information, such as travel dates, expenses, and approval status.</p>	Salesforce

3.	Workflow Automation	Approval Processes: Implement Salesforce Approval Processes to automate and streamline the travel request approval workflow. Process Builder and Flows: Use Process Builder and Flows to automate routine tasks and send notifications.	Salesforce
4.	Reporting and Analytics	Custom Reports: Create custom reports to track travel request status, expenses, and other relevant metrics.	Salesforce
5.	Security	Role-Based Access Control (RBAC): Configure RBAC to control who can access and modify data. Data Encryption: Encrypt sensitive data both in transit and at rest. Audit Trails: Maintain audit trails to log user activities for security and compliance purposes.	Salesforce
6.	Salesforce Development	Apex: Use Salesforce's proprietary programming language, Apex, for server-side logic and data manipulation. Visualforce: Develop custom user interfaces with Visualforce pages and components. Lightning Web Components: Create modern, component-based UIs using Lightning Web Components for a more responsive and dynamic user experience	Salesforce

Table-2: Application Characteristics:

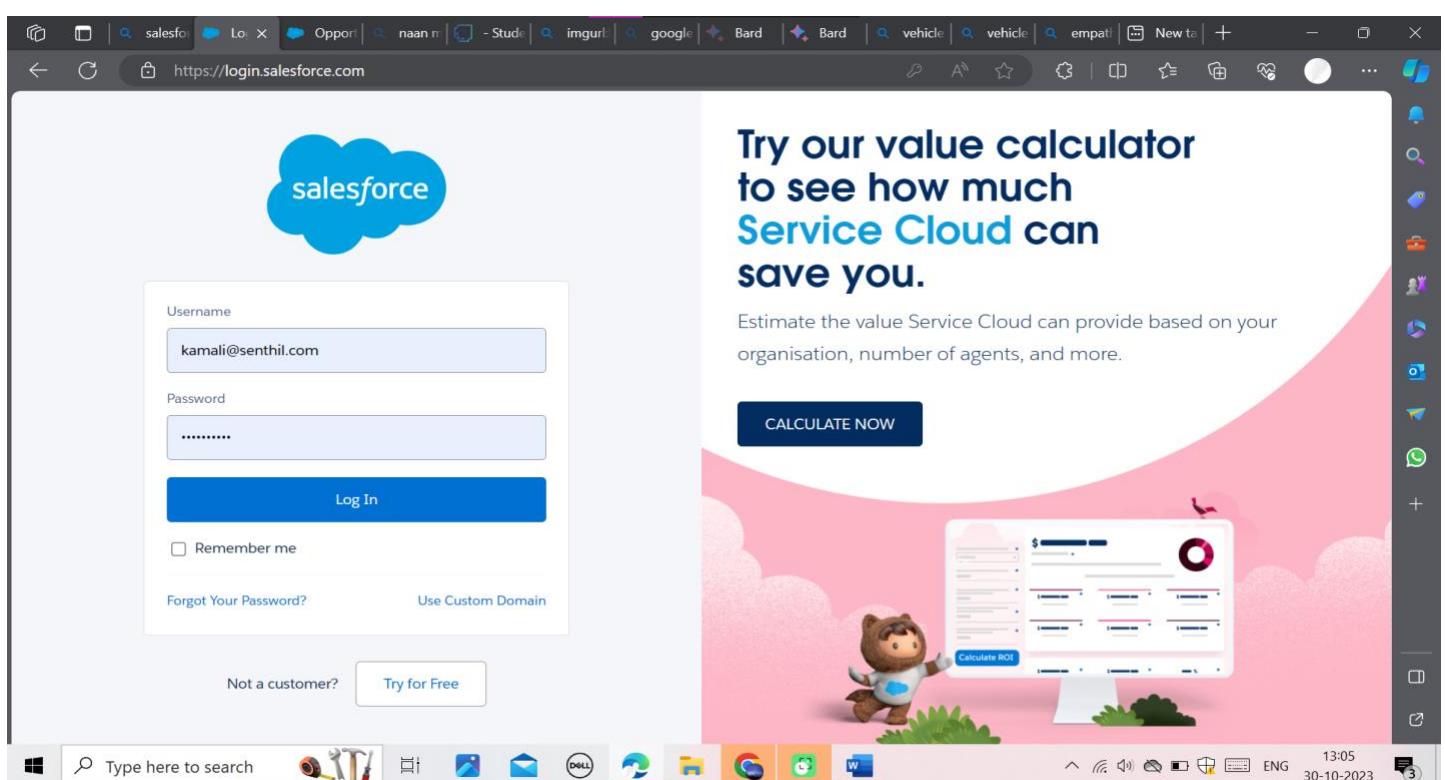
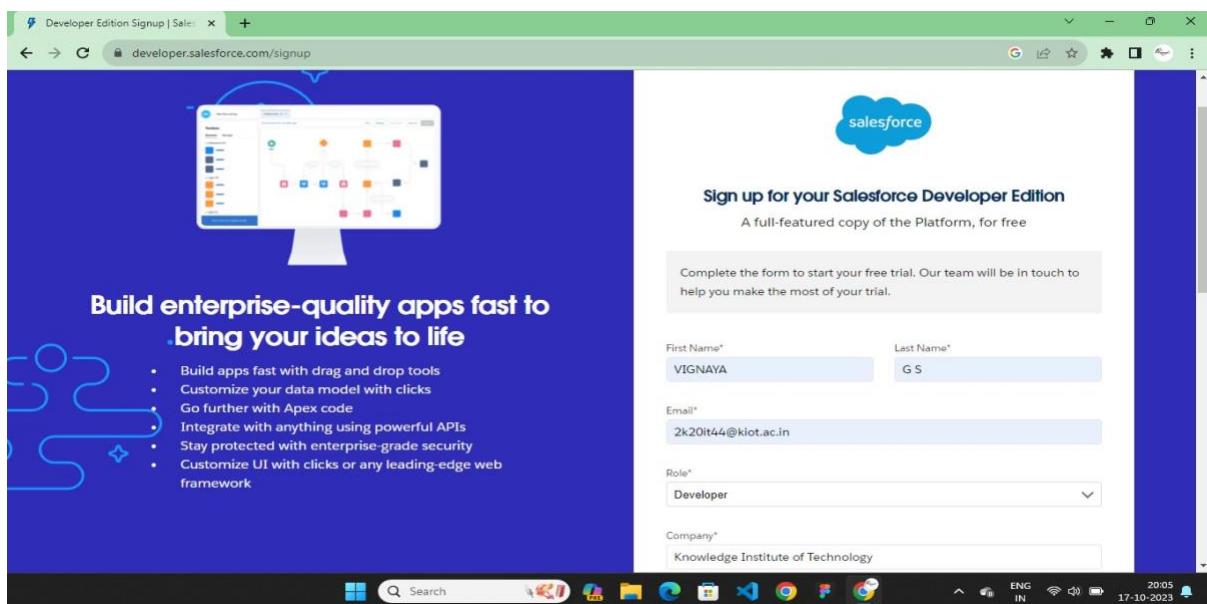
S. No	Characteristics	Description	Technology
1.	Responsive Design	Implement responsive design to adapt to various screen sizes, ensuring a consistent and visually pleasing user experience.	salesforce
2.	Accessibility	Ensure that the application is accessible via multiple devices and browsers, catering to users on desktops, tablets, and mobile devices. This accessibility is crucial for users who need to make or approve travel requests while on the go.	salesforce
3.	User-friendly	The application should have an intuitive and user-friendly interface to make it easy for employees, managers, and administrators to navigate and use the system without extensive training.	Salesforce
4.	Scalability	The application should be able to scale with the growing number of users and data, accommodating increasing demands without significant performance degradation.	salesforce
5.	Performance	Ensure the application's performance meets or exceeds user expectations, with rapid response times for actions such as submitting requests or generating reports.	salesforce
6.	Reporting and Analytics	Enable users to generate custom reports and access analytics tools to gain insights into travel patterns, expenses, and approval efficiency.	salesforce

CHAPTER-2

PREPARATION DATA MODELING

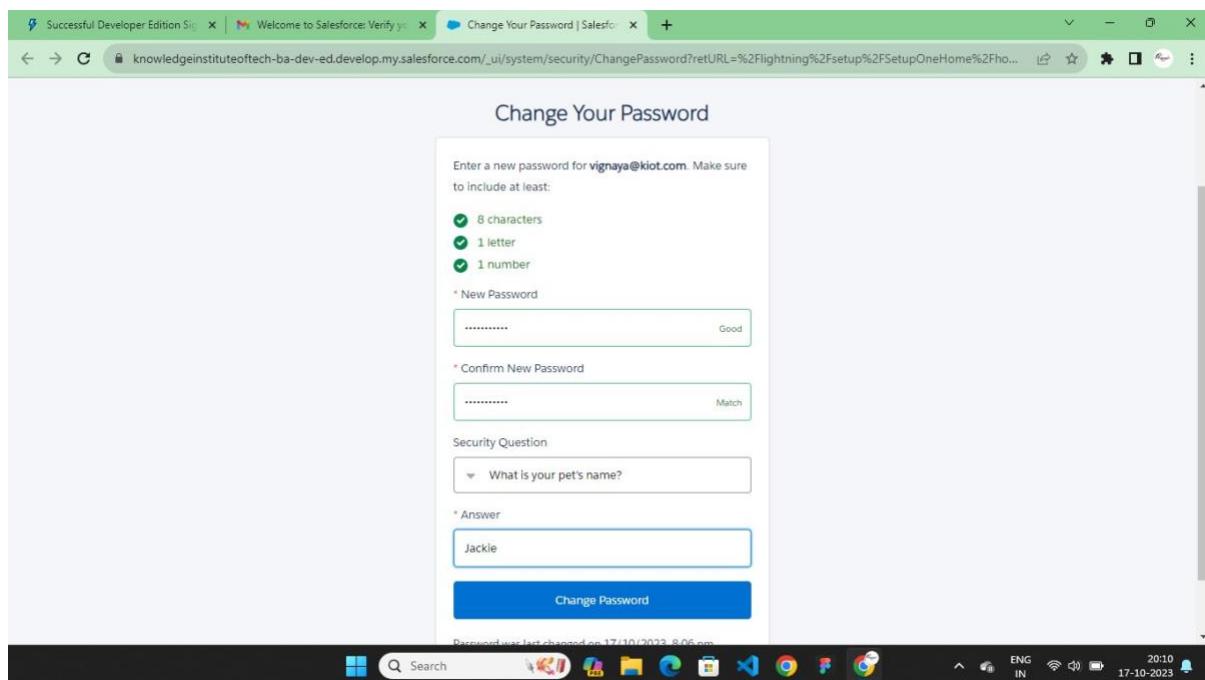
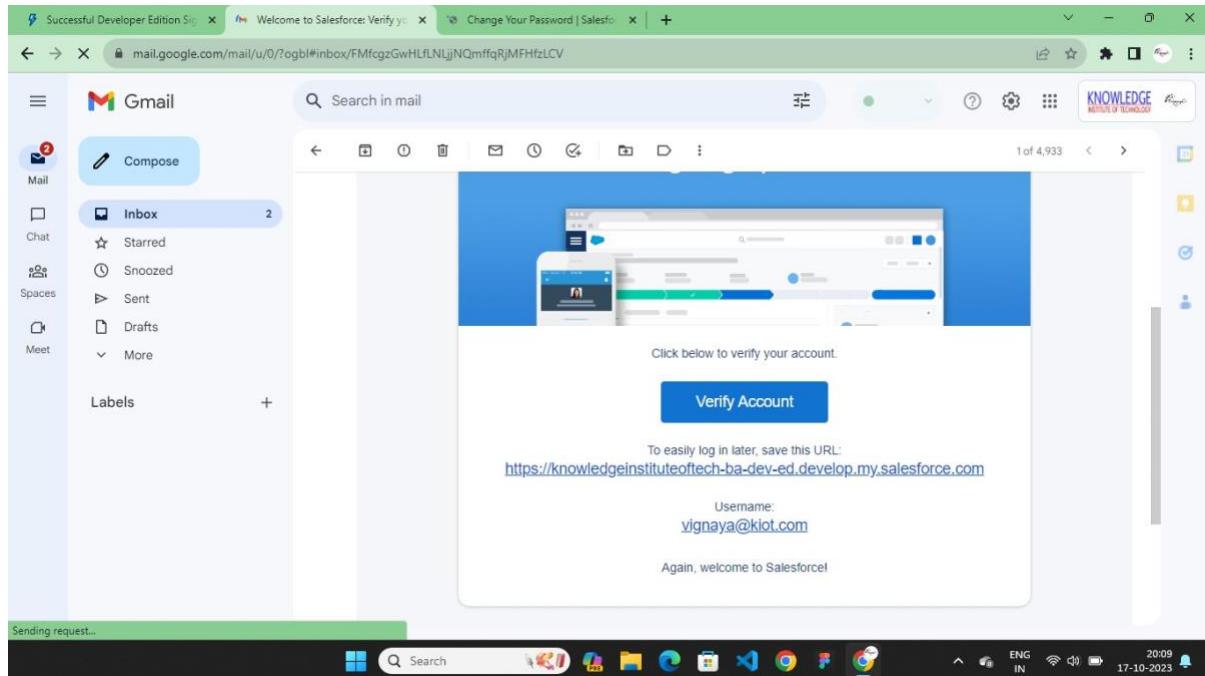
2.1 Salesforce Developer Org

In Salesforce, a Developer Sign Up or Developer Edition is a special type of Salesforce environment that is primarily used for development, testing, and learning purposes.



Account Activation

Activation tracks information about devices from which users have verified their identity.



2.2 Custom Object Creation & Tabs

Custom Object Creation

Objects are containers for your information, but they also give you special functionality.

Custom objects are created to store information that's specific to your company or industry.

Custom Objects in Travel Approval App:

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for 'Recently Viewed | Travel Approval' and 'Object Manager | Salesforce'. The main area displays a list of standard objects under the 'Object Manager' tab. The columns are labeled: 'LABEL', 'TYPE', 'DESCRIPTION', 'LAST MODIFIED', and 'DEPLOYED'. Some visible entries include 'Expense Items' (Standard Object), 'Expense' (Standard Object), 'Department' (Standard Object), 'Employee Detail' (Standard Object), 'Payment Method' (Standard Object), 'API Anomaly Event Store' (Standard Object), 'Appointment Category' (Standard Object), 'Appointment Invitation' (Standard Object), 'Appointment Invitee' (Standard Object), 'Appointment Topic Time Slot' (Standard Object), 'Asset' (Standard Object), 'Asset Action' (Standard Object), 'Asset Action Source' (Standard Object), and 'Asset Relationship' (Standard Object). A search bar at the top right allows for quick finding of objects.

Fields in Travel Approval Object

The screenshot shows the Salesforce Object Manager interface for the 'Travel Approval' object. The top navigation bar includes tabs for 'Recently Viewed | Travel Approval' and 'Travel Approval | Salesforce'. The main area displays the 'Fields & Relationships' section for the 'Travel Approval' object. The left sidebar lists various setup categories like 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', etc. The right pane shows a table titled 'Fields & Relationships' with 14 items, sorted by Field Label. The columns are labeled: 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The fields listed are: 'Created By' (CreatedById, Lookup(User)), 'Department' (Department__c, Lookup(Department)), 'Destination State' (Destination_State__c, Text(2)), 'Employee Name' (Employee_Name__c, Lookup(Employee Detail)), 'Last Modified By' (LastModifiedById, Lookup(User)), 'Out Of State' (Out_Of_State__c, Checkbox), 'Owner' (OwnerId, Lookup(User/Group)), 'Purpose of Trip' (Purpose_of_Trip__c, Text Area(255)), and 'Status' (Status__c, Picklist). A search bar at the top right allows for quick finding of fields.

Fields & Relationships
14 Items, Sorted by Field Label

Out Of State	Out_Of_State__c	Checkbox	
Owner	OwnerId	Lookup(User,Group)	✓
Purpose of Trip	Purpose_of_Trip__c	Text Area(255)	
Status	Status__c	Picklist	
Status Indicator	Status_Indicator__c	Formula (Text)	
Total Expenses	Total_Expenses__c	Roll-Up Summary (SUM Expense Items)	
Travel Approval	Name	Auto Number	✓
Trip End Date	Trip_End_Date__c	Date	
Trip Start Date	Trip_Start_Date__c	Date	

Fields in Department Object

Fields & Relationships
8 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Department Code	Department_Code__c	Text(6)		
Department Name	Name	Text(80)	✓	
District	District__c	Text(40)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	
Schoolwebsite	Schoolwebsite__c	URL(255)		
State	State__c	Text(40)		

Fields in Employee Detail Object

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

- Tab:** Employee Detail | Salesforce
- Section:** Fields & Relationships
- Table Headers:** FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, INDEXED
- Table Data:**

Created By	CreatedById	Lookup(User)		
Date of Birth	Date_of_Birth__c	Date		
Department	Department_c	Lookup(Department)	✓	
Employee Id	Employee_Id__c	Text(12)		
Employee Name	Name	Text(80)	✓	
Gender	Gender__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	

Fields in Expense Object

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

- Tab:** Expense | Salesforce
- Section:** Fields & Relationships
- Table Headers:** FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, INDEXED
- Table Data:**

Created By	CreatedById	Lookup(User)		
Employee	Employee__c	Lookup(Employee Detail)	✓	
Employee Detail	Employee_Detail__c	Lookup(Employee Detail)	✓	
Expense	Name	Auto Number	✓	
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	

Fields in Expense Items Object

The screenshot shows the Salesforce Object Manager interface for the 'Expense Items' object. The left sidebar has tabs for 'Details', 'Fields & Relationships' (which is selected), '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', and 'Restriction Rules'. The main area is titled 'Fields & Relationships' and lists six items, sorted by Field Label. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Amount	Amount_c	Currency(16, 2)		
Created By	CreatedById	Lookup(User)		
Expense Items Name	Name	Text(60)		
Expense Type	Expense_Type__c	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Travel Approval	Travel_Approval__c	Master-Detail(Travel Approval)		

Tabs

Salesforce Tabs are like the menu options in a software application. They allow you to access specific functions, objects, or data.

The screenshot shows the Salesforce Setup page under the 'User Interface' tab, specifically the 'Tabs' section. The left sidebar has tabs for 'User Interface', 'Rename Tabs and Labels', and 'Tabs' (which is selected). The main area is titled 'Custom Tabs' and contains a message about creating new custom tabs. It also includes sections for 'Custom Object Tabs', 'Web Tabs', and 'Visualforce Tabs'. The 'Custom Object Tabs' section shows a table with five entries:

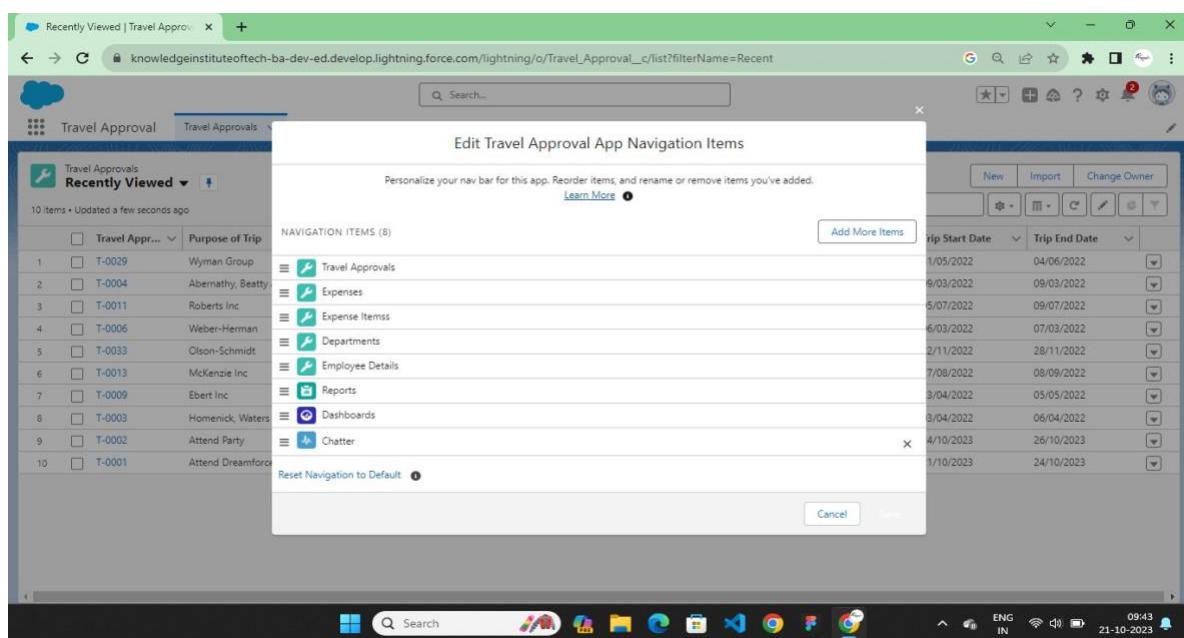
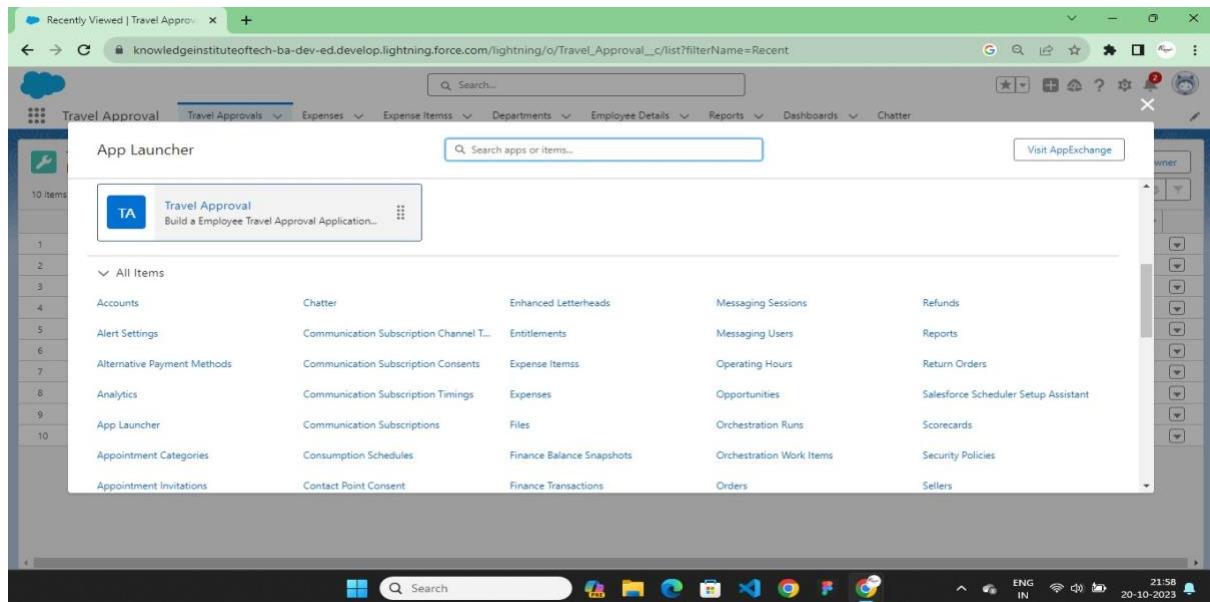
Action	Label	Tab Style	Description
Edit Del	Departments	Wrench	
Edit Del	Employee Details	Wrench	
Edit Del	Expense Items	Wrench	
Edit Del	Expenses	Wrench	
Edit Del	Travel Approvals	Wrench	

2.3 Lightning App

The Lightning App Builder is a point-and-click tool that makes it easy to create custom pages for the Salesforce mobile app and Lightning Experience, giving your users what they need all in one place.

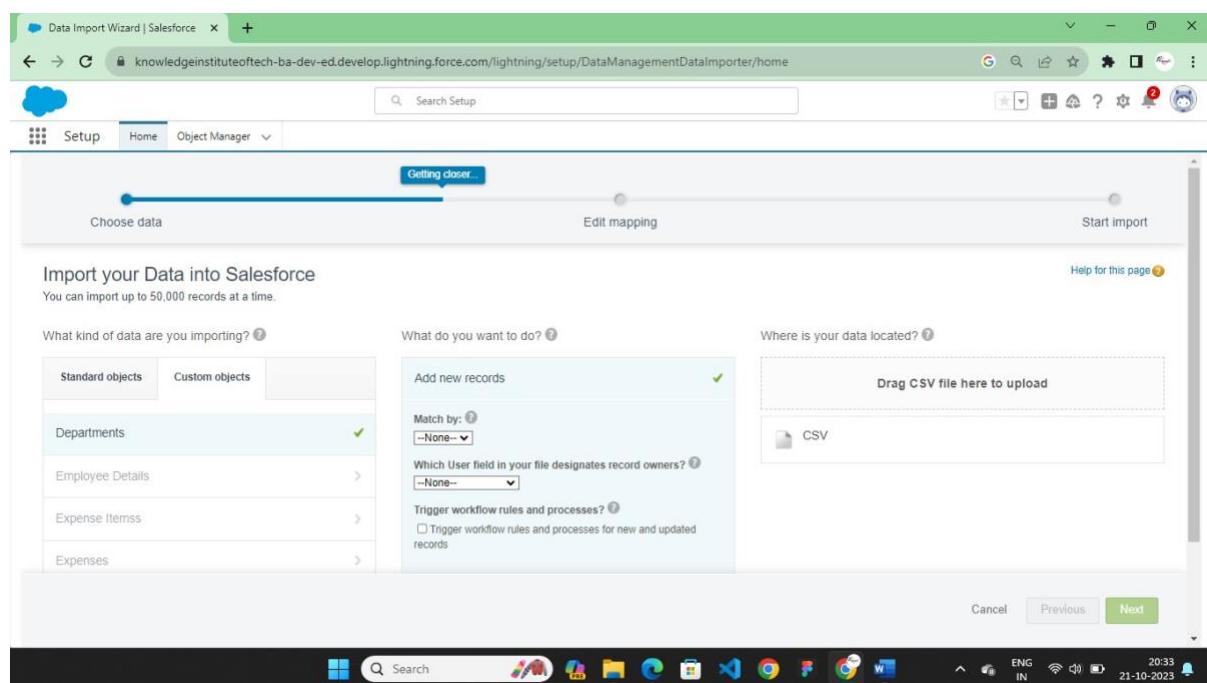
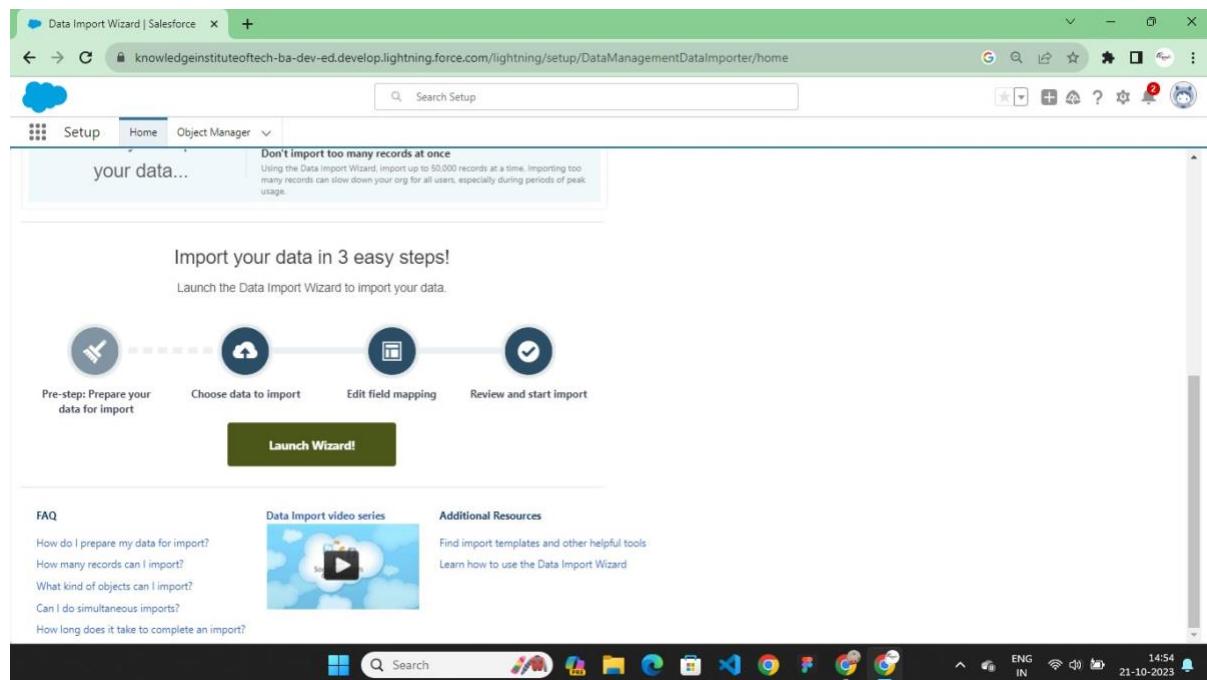
Create a Travel Approval Lightning App

- Build a Lightning app, add tabs, and customize page layouts.
- Create custom objects and fields for the app.
- Define relationships between objects.
- Import data and test the app.



Data Import

The Data Import Wizard is one of various tools available to Salesforce users for importing data. The tool is best used when importing data into the Account, Contact, Lead, or Solution objects along with any custom objects within your Salesforce organization.



2.4 Relationship between Objects

Master-Detail Relationship

A master-detail relationship defines the relationship between the parent and the child.

The master table defines the parent relation and the detail defines the child relation.

Recently Viewed | Travel Approval | Expense Items | Salesforce

knowledgeinstituteoftech-ba-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01i5j00000288hq/FieldsAndRelationships/00N5j00000RoW... Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Expense Items

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

Expense Items Custom Field Travel Approval Back to Expense Items

Custom Field Definition Detail

Field Information

Field Label	Travel Approval	Object Name	Expense Items
Field Name	Travel_Approval	Data Type	Master-Detail
API Name	Travel_Approval_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	VIGNAVAJ.S_ 19/10/2023, 2:09 pm	Modified By	VIGNAVAJ.S_ 19/10/2023, 2:09 pm

Master-Detail Options

Related To	Travel Approval	Child Relationship Name	Expense_Items
Related List Label	Expense Items		
Sharing Setting	ReadWrite: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.		
Reparentable Master Detail			

Validation Rules | Set Field-Level Security | View Field Accessibility | Where is this used?

Lookup Filter

Look up Relationship

Lookup Relationship in Salesforce relates two objects together but does not affect deletion (cascade delete functionality) or security.

Recently Viewed | Travel Approval | Expense | Salesforce

knowledgeinstituteoftech-ba-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01i5j00000288hI/FieldsAndRelationships/00N5j00000RoX9... Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Expense

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

Expense Custom Field Employee Detail Back to Expense

Custom Field Definition Detail

Field Information

Field Label	Employee Detail	Object Name	Expense
Field Name	Employee_Detail	Data Type	Lookup
API Name	Employee_Detail_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	VIGNAVAJ.S_ 19/10/2023, 8:25 pm	Modified By	VIGNAVAJ.S_ 19/10/2023, 8:25 pm

Lookup Options

Related To	Employee_Detail	Child Relationship Name	Expenses1
Related List Label	Expenses (Employee Detail)		
Required			
What to do if the lookup record is deleted?	Clear the value of this field.		

Validation Rules | Set Field-Level Security | View Field Accessibility | Where is this used?

Lookup Filter

Build A Employee Travel Approval Application For Corporates

The screenshot shows the Salesforce Object Manager interface. A custom field named 'Department' has been created under the 'Travel Approval' object. The field is defined as a lookup type, pointing to the 'Department' object. It is required and has a related list label 'Travel Approvals'. The field was created by VIGNAYA.Q.S on 19/10/2023 at 2:03 pm.

Roll-up Summary

Roll-Up Summary Fields in Salesforce summarize data of particular fields from a set of related detail records and automatically display the output on the master record.

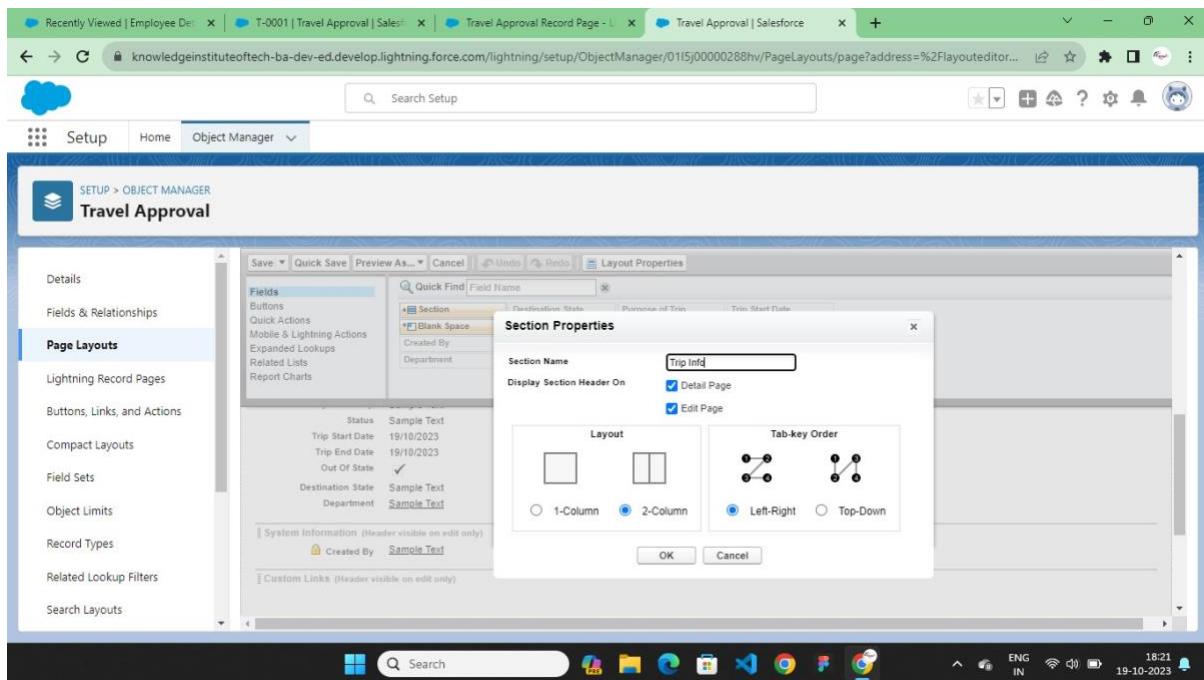
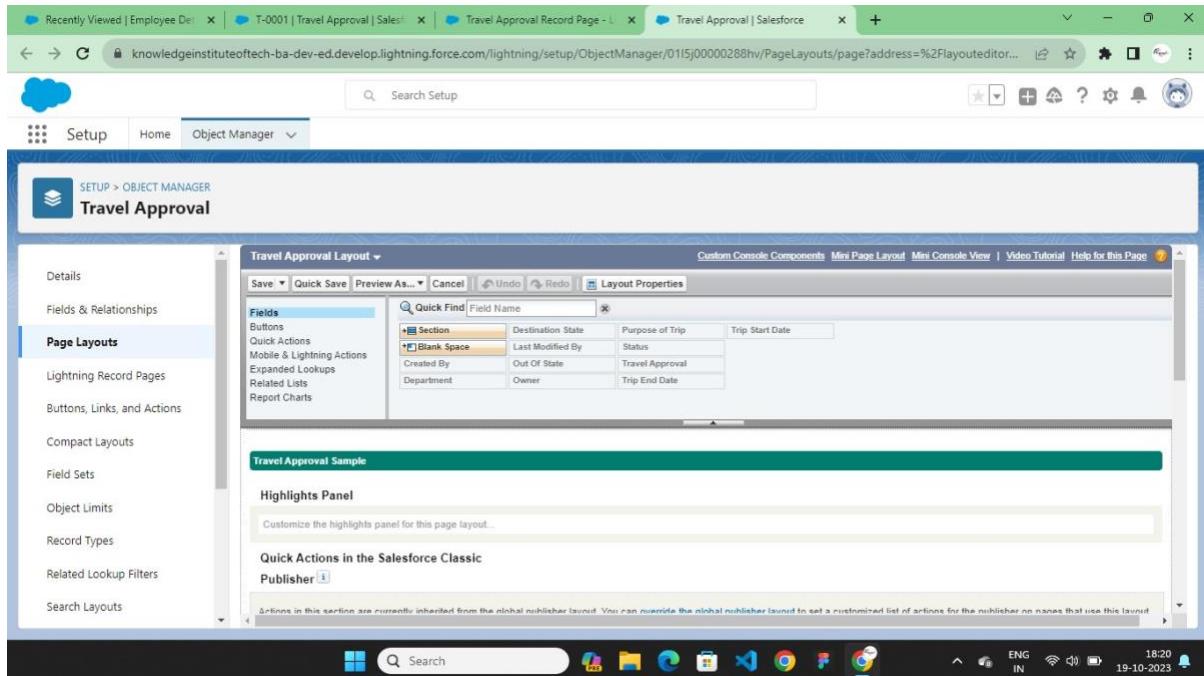
The screenshot shows the Salesforce Object Manager interface. A roll-up summary field named 'Total Expenses' has been created under the 'Travel Approval' object. This field summarizes the 'Expense__Amount' field from the 'Expense Items' object. The summary type is set to 'SUM'. The field was created by VIGNAYA.Q.S on 19/10/2023 at 6:55 pm.

2.5 Customize User Interface

Customize your app's page layouts, compact layouts, and actions.

Page Layout

A page layout determines the fields, sections, related lists, and buttons that appear when users view or edit a record. You can modify an object's default page layout or create a custom page layout.

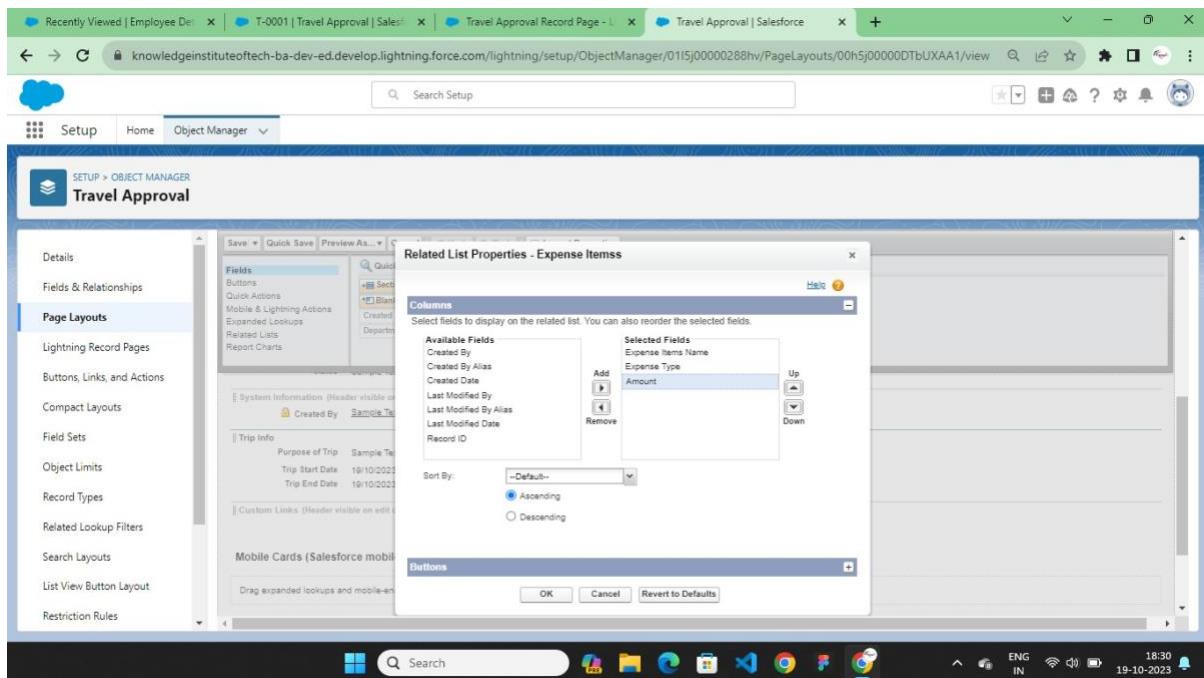


Build A Employee Travel Approval Application For Corporates

The screenshot shows the Lightning App Builder interface. At the top, there are three tabs: 'Recently Viewed | Employee Det...', 'T-0001 | Travel Approval | Sales...', and 'Travel Approval Record Page - L...'. The main area displays a 'Travel Approval' record page for 'T-0001'. The page has a 'Details' section containing fields like 'Purpose of Trip', 'Attendee Name', 'Status', 'Trip Start Date', 'Trip End Date', 'Last Update', 'Destination State', 'Department', and 'Technology'. On the left, a sidebar lists 'Components' and 'Fields' under 'Standard (34)'. Components include Accordion, Action Launcher, Actions & Recommendations, Assessment List, CRM Analytics Collection, CRM Analytics Dashboard, Dynamic Related List - Single, Einstein Next Best Action, Flow, Flow Orchestration Work Guide, Highlights Panel, and Launchpad. The bottom status bar shows the URL 'knowledgeinstituteoftech-ba-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=flexipage__default_rec_L&recordId=a045j00000LNCdBAAX&clon...', the date '19-10-2023', and the time '18:19'.

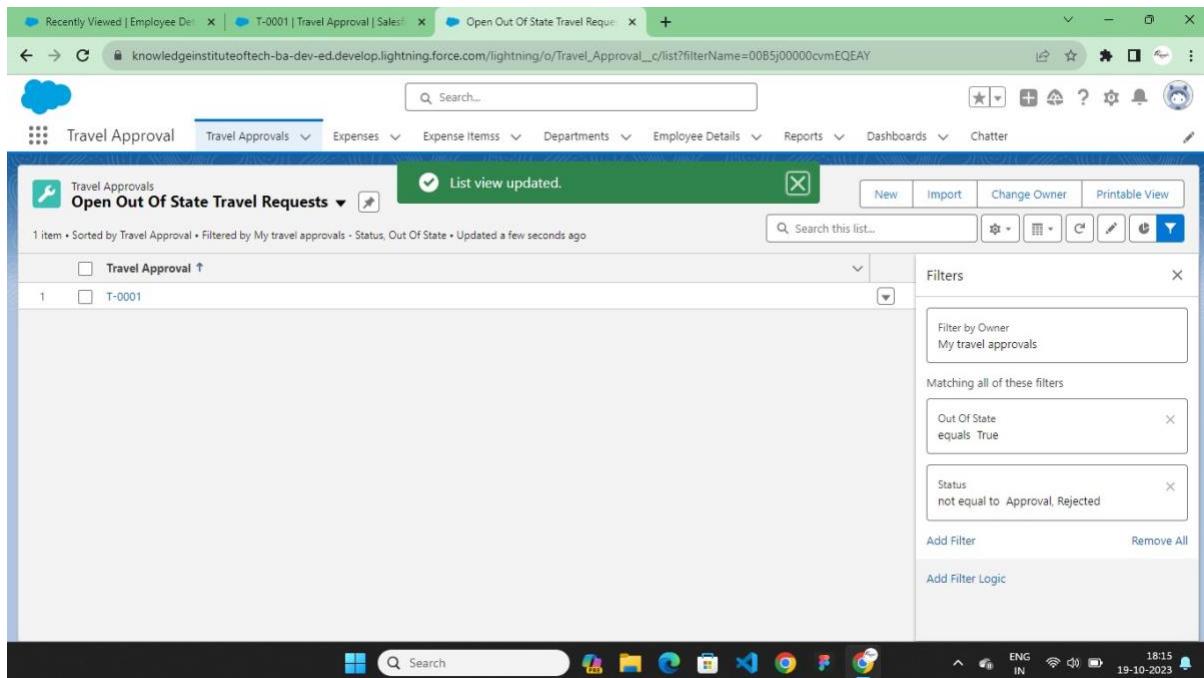
The screenshot shows the Salesforce Setup Object Manager. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main content area is titled 'SETUP > OBJECT MANAGER' and 'Travel Approval'. On the left, a sidebar lists 'Page Layouts' (selected), 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', 'Related Lookup Filters', and 'Search Layouts'. The right pane shows a table for 'Page Layouts' with one item: 'Travel Approval Layout' created by 'VIGNAYA G S' on 17/10/2023 at 8:40 pm, last modified by 'VIGNAYA G S' on 19/10/2023 at 6:26 pm. The bottom status bar shows the URL 'knowledgeinstituteoftech-ba-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0115j00000288hv/PageLayouts/view', the date '19-10-2023', and the time '18:26'.

Build A Employee Travel Approval Application For Corporates



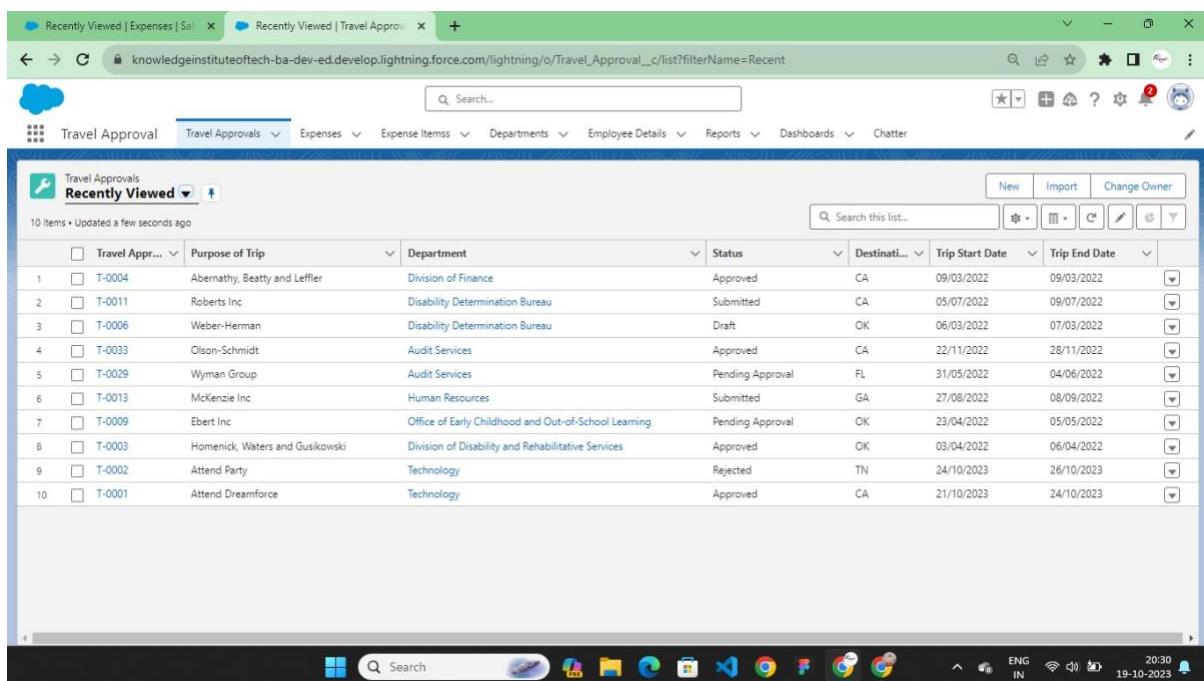
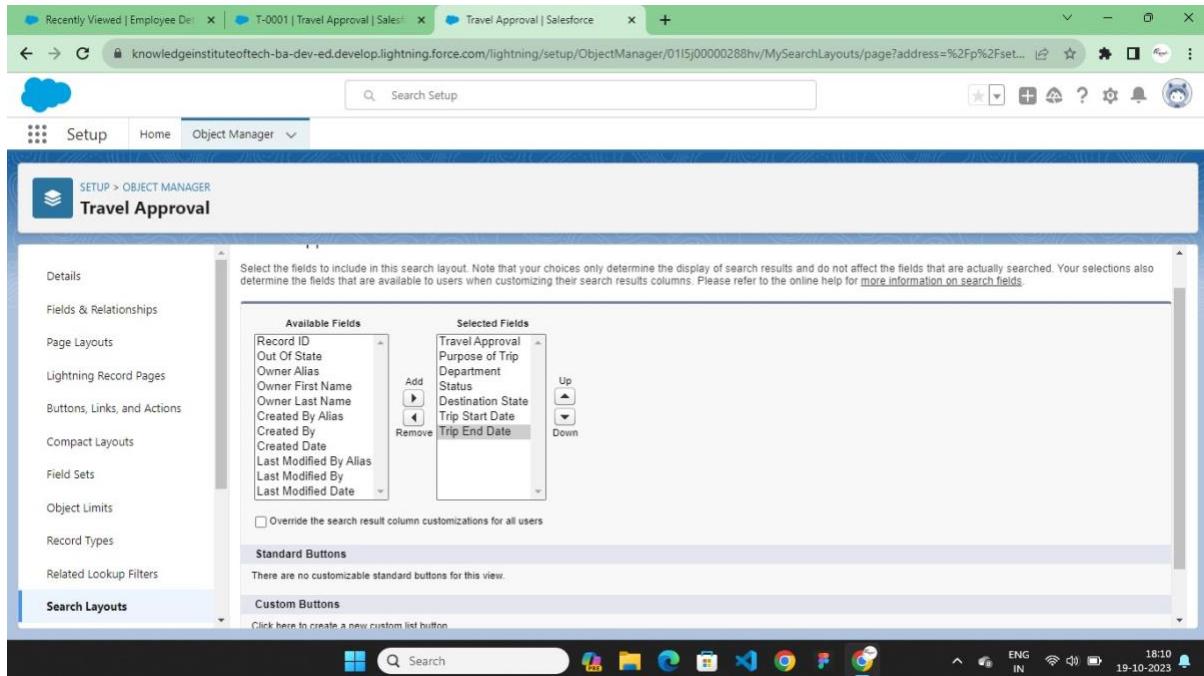
List View

A list view is a set of search conditions that displays records that match the search conditions.



Search Layout

Create search layouts for standard and custom objects, ensuring the layout shows users what's most relevant to them.



2.6 Business Logic

Validation Rules

Validation rules let you set up business-specific criteria to prevent users from saving invalid data in one or more fields.

A validation rule evaluates a formula when a record is saved.

If a rule's criteria aren't met, users see a custom error message and the record doesn't save.

If a rule's criteria are met, the record saves.

Use validation rules to improve data quality by applying conditions, ensuring proper formatting, and enforcing consistency.

The screenshot shows a screenshot of a web browser displaying the Salesforce Object Manager. The URL in the address bar is `knowledgeinstituteoftech-ba-dev-ed.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F03d5j000000RGcA`. The page title is "Travel Approval Validation Rule". The main content area shows the "Validation Rule Detail" for the rule named "Trip_end_date_after_start_date". The rule is active and has the formula `Trip_End_Date__c < Trip_Start_Date__c`. The error message is "Trip end date must be greater than or equal to start date". The error location is "Trip End Date". The rule was created by "VIGNAYA.G.S" on 19/10/2023, 6:51 pm, and modified by the same user on the same date and time. There are "Edit" and "Clone" buttons at the bottom of the form.

CHAPTER-3

USERS & DATA SECURITY

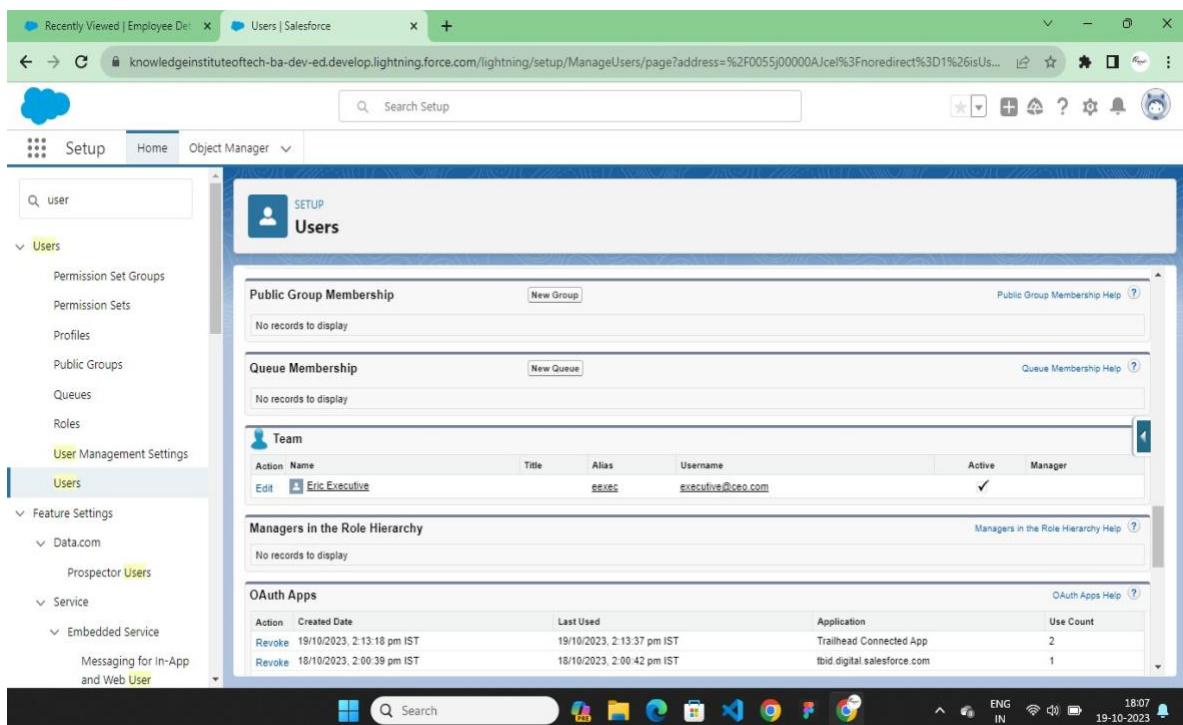
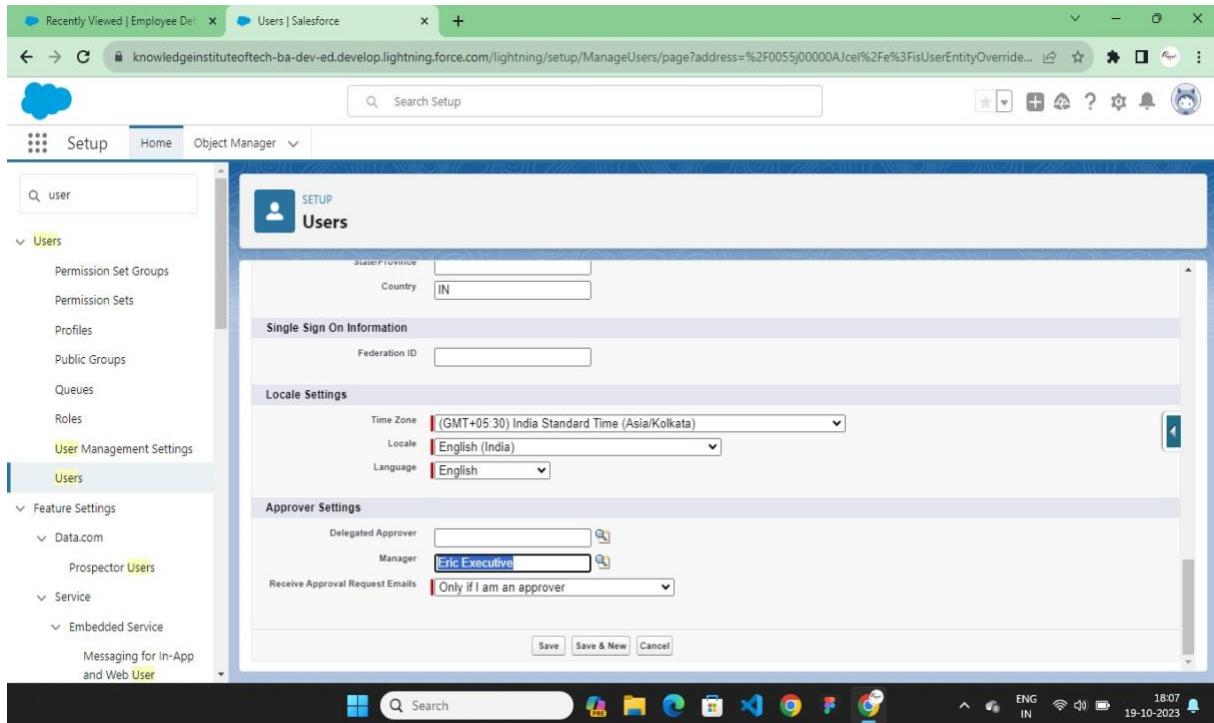
3.1 User Creation & Setup Approvals

Before customizing the travel app, first create a new user, Eric Executive, and set him up as manager. This involves assigning roles and profiles so that Eric has the correct permissions to approve travel requests.

Name	Eric Executive	Role	CEO
Alias	exec	User License	Salesforce
Email	gathivignaya06@gmail.com [Verified]	Profile	System Administrator
Username	executive@ceo.com	Status	Active <input checked="" type="checkbox"/>
Nickname	eric exec	Marketing User	<input type="checkbox"/>
Title		Offline User	<input type="checkbox"/>
Company		Knowledge User	<input type="checkbox"/>
Department		Flow User	<input type="checkbox"/>
Division		Service Cloud User	<input type="checkbox"/>
Address		Site.com Contributor User	<input type="checkbox"/>
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>
Locale	English (India)	WDC User	<input type="checkbox"/>
Language	English	Mobile Push Registrations	View

Full Name	Role
Eric Executive	CEO
VIGNAYA G S	

Build A Employee Travel Approval Application For Corporates

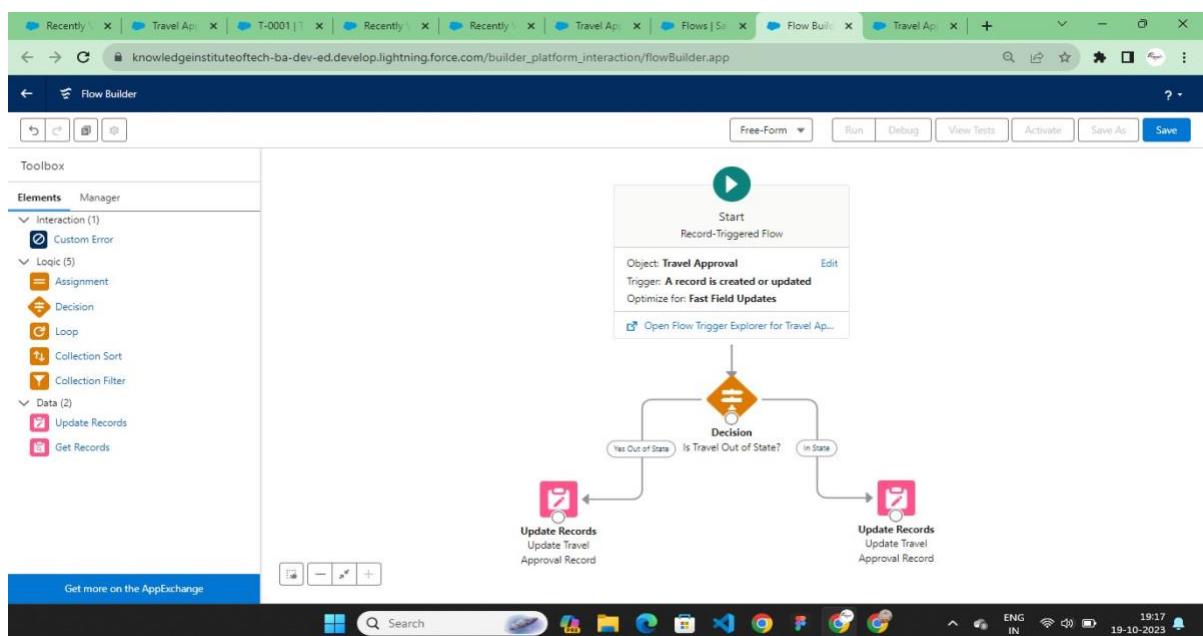
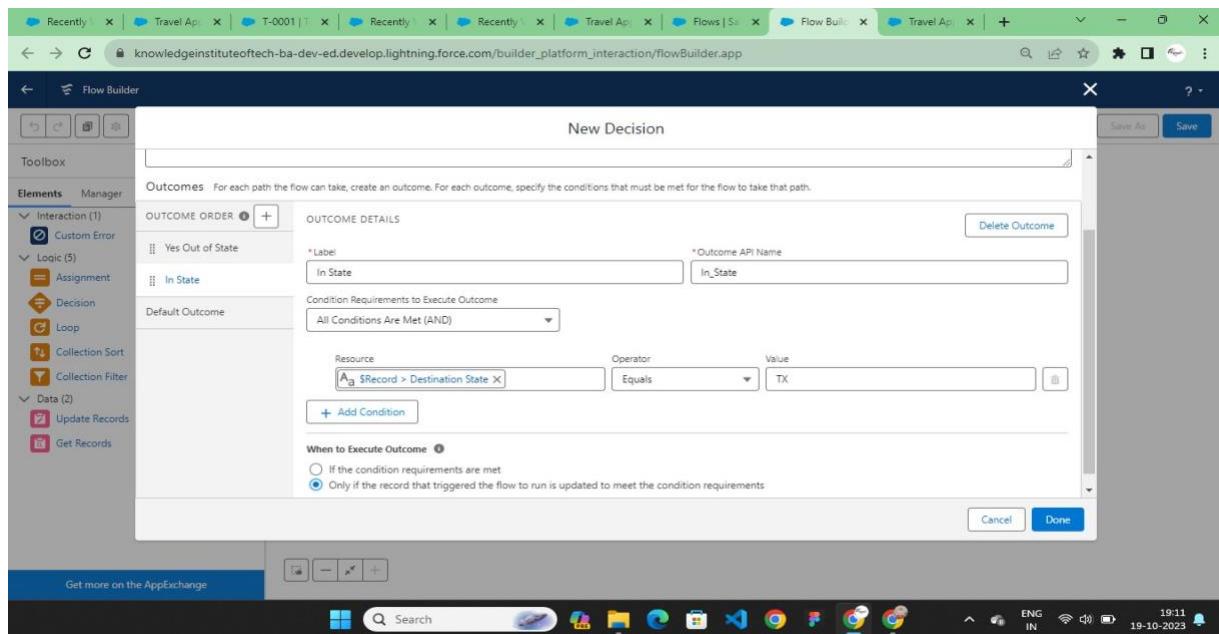


CHAPTER-4

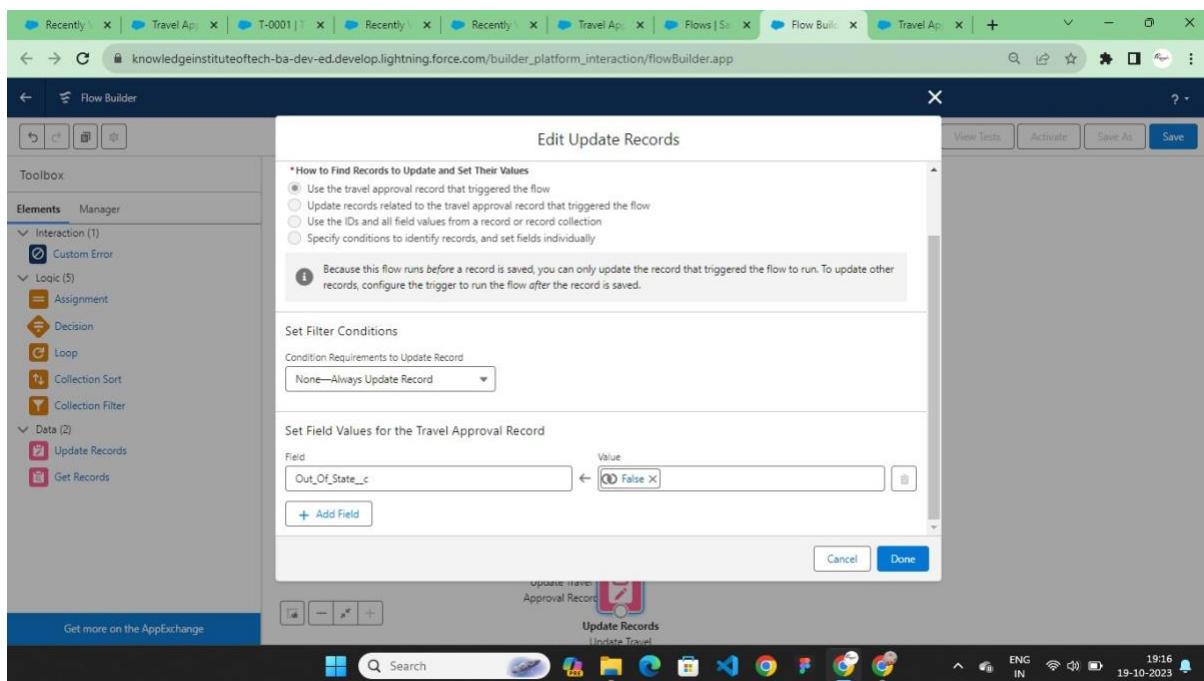
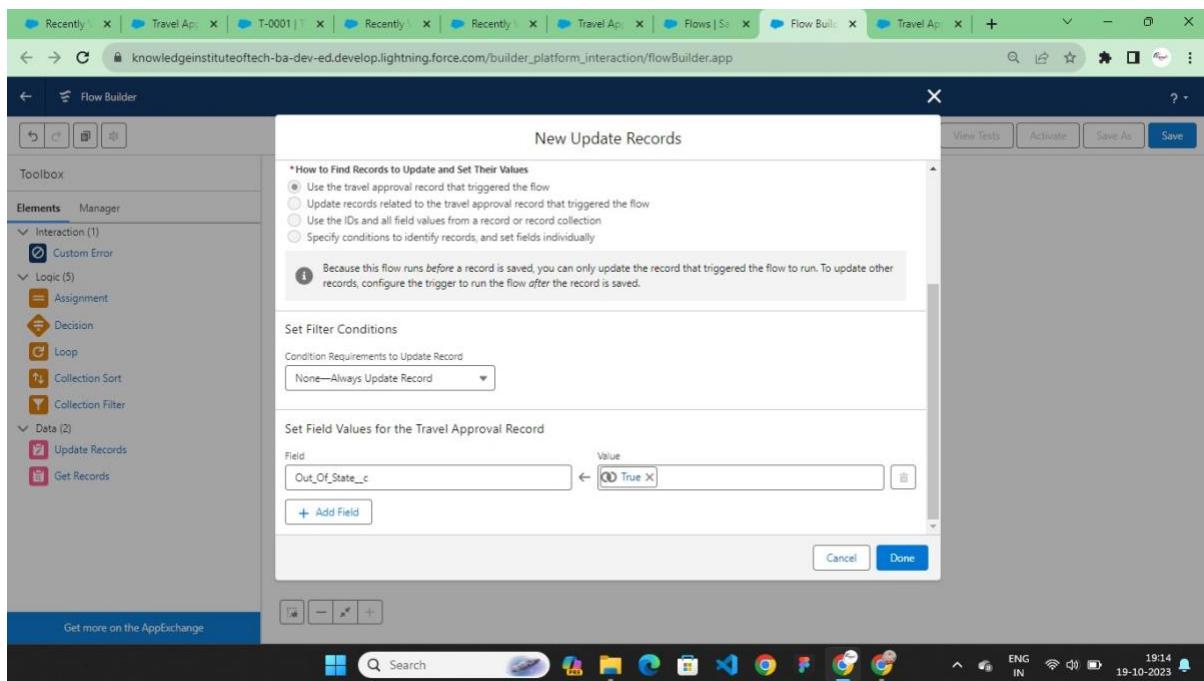
AUTOMATION

4.1 Flow

The last business rule functionality to implement before testing your application is a rule to set the Out-of-State checkbox field on the Travel Approval object if out-of-state travel has been chosen. Salesforce offers workflow capabilities that provide a declarative, drag-and-drop design environment to build our business process logic.



Build A Employee Travel Approval Application For Corporates

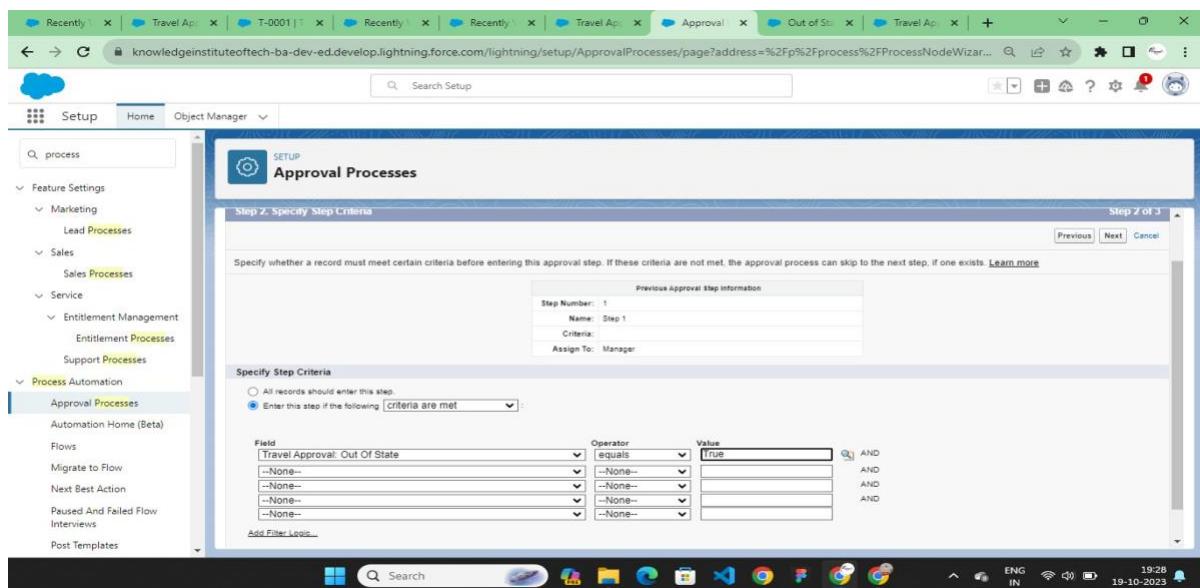
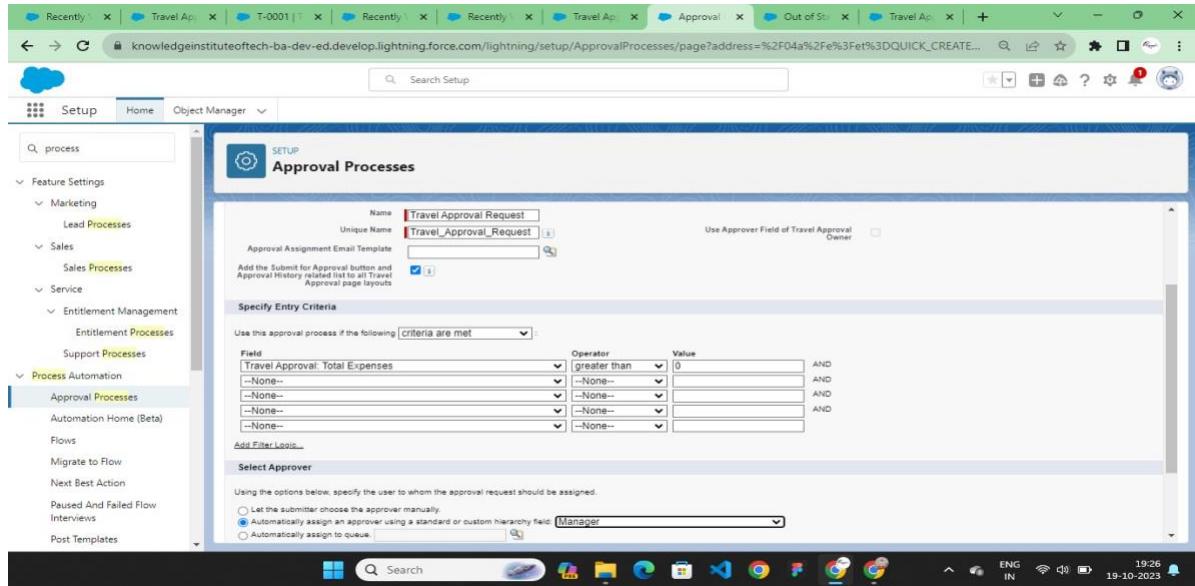


4.2 Approval Process

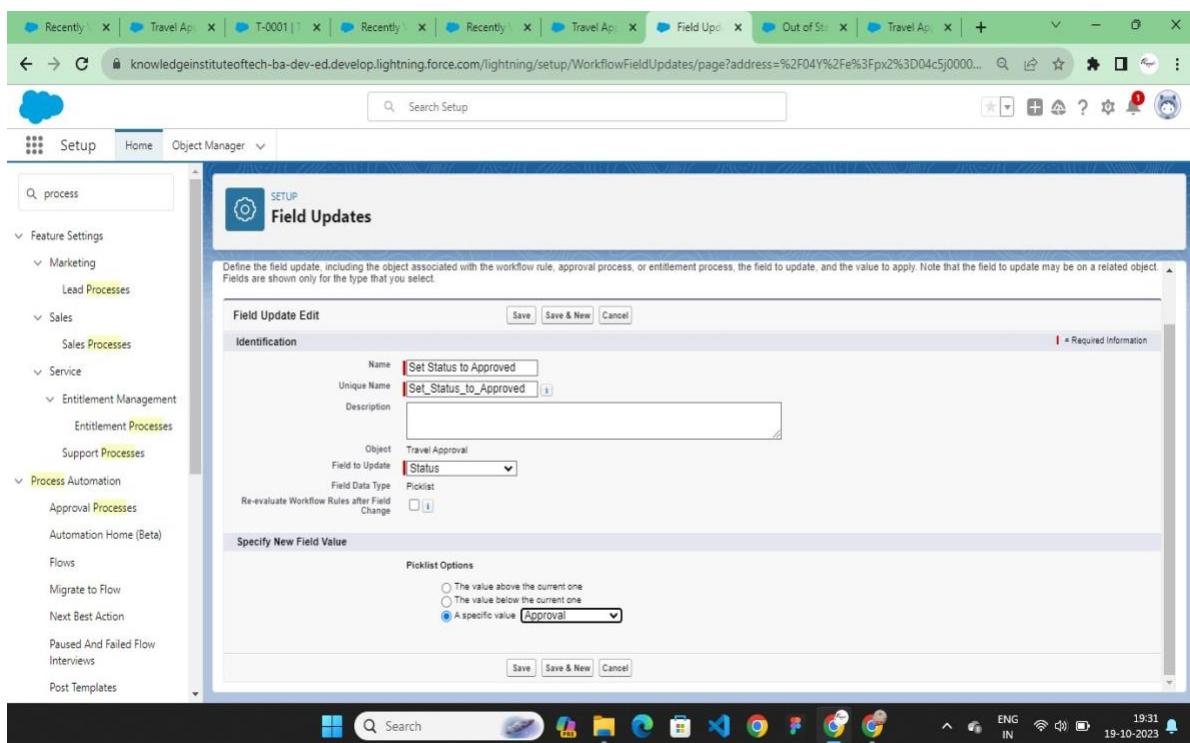
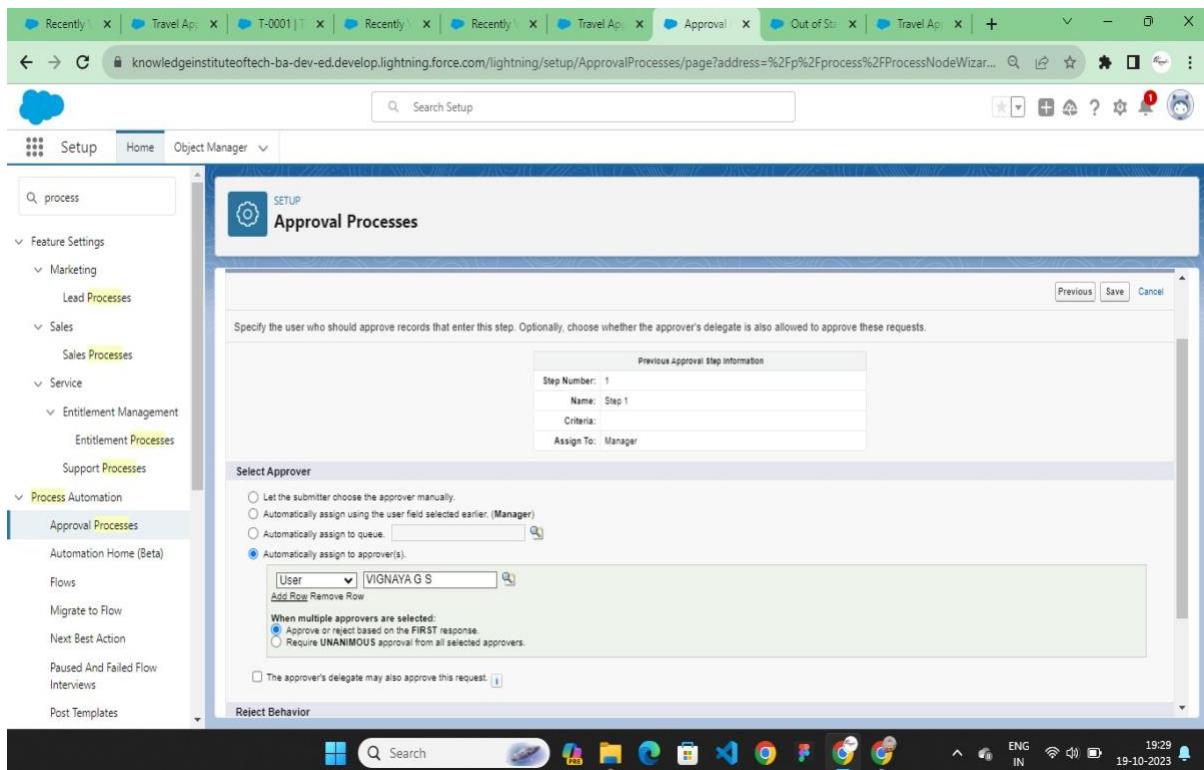
An approval process is an automated process your agency can use to approve records in Salesforce.

An approval process specifies the criteria a record must meet before it can be submitted for approval, the steps necessary for a record to be approved, and who must approve it at each step.

A step can apply to all records included in the process or just records that have certain attributes. An approval process also specifies the actions to take when a record is approved, rejected, recalled, or first submitted for approval.



Build A Employee Travel Approval Application For Corporates



Final Views

The screenshot shows the Salesforce Lightning interface for a Travel Approval record. The record ID is T-0001. The page includes fields for Trip Start Date (21/10/2023), Trip End Date (24/10/2023), and Destination State (CA). The status is set to Draft. The purpose of the trip is listed as "Attend Dreamforce". The owner of the record is VIGNAYA G S.

The screenshot shows the Salesforce Lightning interface for a Travel Approval record. The page displays a list of expense items. There are two entries: Airfare (Amount: ₹450.00) and Hotel (Amount: ₹870.00).

Expense Item Name	Expense Type	Amount
Airfare	Airfare	₹450.00
Hotel	Hotel	₹870.00

Build A Employee Travel Approval Application For Corporates

The screenshot shows a Salesforce Lightning interface for a travel approval application. The main page displays a travel request for 'T-0001' with the following details:

- Travel Approval:** T-0001
- Status:** Draft
- Total Expenses:** ₹1,320.00
- Status Indicator:** (gear icon)
- Created By:** VIGNAYA G S, 19/10/2023, 2:25 pm
- Last Modified By:** VIGNAYA G S, 19/10/2023, 2:25 pm

In the 'Trip Info' section, the purpose of the trip is listed as 'Attend Dreamforce'. The travel is categorized as 'Out Of State' with the checkbox checked. The destination state is listed as 'CA'.

The right side of the screen features a Chatter feed. A post from 'VIGNAYA G S' 56m ago asks, '@Eric Executive Which department should I associate this travel request with?'. The feed also shows a like from 'Eric Executive' and a comment from 'Eric Executive' an hour ago.

The screenshot shows the same Salesforce Lightning interface after the travel request has been submitted. A modal window titled 'Submit for Approval' displays the message 'successfully submitted' in the 'Comments' section. The 'Submit' button is visible at the bottom of the modal.

The rest of the page remains the same, showing the travel request details and the Chatter feed.

Build A Employee Travel Approval Application For Corporates

The screenshot shows a travel approval application interface. At the top, there's a navigation bar with links like 'Travel Approvals', 'Expenses', 'Expense Items', 'Departments', 'Employee Details', 'Reports', 'Dashboards', and 'Chatter'. Below the navigation is a section titled 'Travel Approval T-0001'.

Expense Items:

Expense Item Name	Expense Type	Amount
Airfare	Airfare	₹450.00
Hotel	Hotel	₹870.00

Approval History (2):

Step Name	Date	Status	Assigned To
Step 1	19/10/2023, 7:41 pm	Pending	Eric Executive
Approval Request Submitted	19/10/2023, 7:41 pm	Submitted	VIGNAYA G S

Chatter:

- Share an update... Share
- Search this feed... C
- VIGNAYA G S 57m ago @Eric Executive Which department should I associate this travel request with?
- 1 comment • 1 view
- Like Comment Eric Executive likes this.
- Eric Executive an hour ago Technology is the correct department. Like
- Write a comment...

At the bottom, there's a status bar showing 'javascript:void(0)' and a Windows taskbar with various icons.

The screenshot shows a travel approval application interface. At the top, there's a navigation bar with links like 'Travel Approvals', 'Expenses', 'Expense Items', 'Departments', 'Employee Details', 'Reports', 'Dashboards', and 'Chatter'. Below the navigation is a section titled 'Travel Approval T-0002'.

Related:

- Travel Approval T-0002
- Status: Rejected
- Total Expenses: ₹450.00
- Status Indicator: Red

Details:

Created By: VIGNAYA G S, 19/10/2023, 7:46 pm	Last Modified By: Eric Executive, 19/10/2023, 7:49 pm
Trip Info	
Purpose of Trip: Out Of State	Attend Party: <input checked="" type="checkbox"/>
Trip Start Date: 24/10/2023	Destination State: TN
Trip End Date:	

Chatter:

- Post Poll Question Share an update... Share
- Search this feed... C
- Eric Executive updated this record. Just now Status Submitted to Rejected
- Like Comment Eric Executive
- Write a comment...

At the bottom, there's a status bar showing 'javascript:void(0)' and a Windows taskbar with various icons.

Build A Employee Travel Approval Application For Corporates

Recently Viewed | Travel Approval

knowledgeinstituteoftech-ba-dev-ed.lightning.force.com/lightning/o/Travel_Approval_c/list?filterName=Recent

Travel Approvals

Recently Viewed

10 Items • Updated a few seconds ago

	Travel Approv...	Purpose of Trip	Department	Status	Destinati...	Trip Start Date	Trip End Date
1	<input type="checkbox"/> T-0004	Abernathy, Beatty and Leffler	Division of Finance	Approved	CA	09/03/2022	09/03/2022
2	<input type="checkbox"/> T-0011	Roberts Inc	Disability Determination Bureau	Submitted	CA	05/07/2022	09/07/2022
3	<input type="checkbox"/> T-0006	Weber-Herman	Disability Determination Bureau	Draft	OK	06/03/2022	07/03/2022
4	<input type="checkbox"/> T-0033	Olson-Schmidt	Audit Services	Approved	CA	22/11/2022	28/11/2022
5	<input type="checkbox"/> T-0029	Wyman Group	Audit Services	Pending Approval	FL	31/05/2022	04/06/2022
6	<input type="checkbox"/> T-0013	McKenzie Inc	Human Resources	Submitted	GA	27/08/2022	08/09/2022
7	<input type="checkbox"/> T-0009	Ebert Inc	Office of Early Childhood and Out-of-School Learning	Pending Approval	OK	23/04/2022	05/05/2022
8	<input type="checkbox"/> T-0003	Homenick, Waters and Gusikowski	Division of Disability and Rehabilitative Services	Approved	OK	03/04/2022	06/04/2022
9	<input type="checkbox"/> T-0002	Attend Party	Technology	Rejected	TN	24/10/2023	26/10/2023
10	<input type="checkbox"/> T-0001	Attend Dreamforce	Technology	Approved	CA	21/10/2023	24/10/2023

Recently Viewed | Employee

Travel Approval | Salesforce

Approval Processes | Salesforce

Reports | Salesforce

Chatter Home | Salesforce

knowledgeinstituteoftech-ba-dev-ed.lightning.force.com/lightning/page/chatter

Travel Approval

What I Follow

To Me

Bookmarked

Company Highlights

My Drafts

STREAMS +

You don't have any streams yet. Try creating one!

RECENT GROUPS +

Aw, you don't have any groups! Why not create or join some now?

Post Poll Question

Share an update... Share

Sort by: Top Posts

Search this feed...

T-0001 — VIGNAYA GS 1h ago

@Eric Executive Which department should I associate this travel request with?

Like Comment 1 comment · 1 view

Eric Executive likes this.

Eric Executive 2 hours ago Technology is the correct department. Like

Write a comment...

Einstein Recommendations

- Eric Executive Your manager + Follow Skip
- Integration User Joined in the last week + Follow Skip
- Security User Joined in the last week + Follow Skip

CHAPTER-5

REPORTS & DASHBOARD

5.1 Reports

A Salesforce report is a list of data generated based on filter criteria. Salesforce Reports helped us predict trends and gives us the advantage to increase profits.

The report builder provides a drag-and-drop interface to easily build and customize your reports.

The screenshot shows the Salesforce Reports page. At the top, there are several tabs: Recently Viewed | Employee, Travel Approval | Salesforce, Approval Processes | Salesforce, Reports | Salesforce (which is active), and Reports | Salesforce. Below the tabs is a search bar with placeholder text "Search...". To the right of the search bar are icons for star, plus, minus, and other navigation. The main content area displays a table of recent reports. The columns are: REPORTS, Report Name, Description, Folder, Created By, Created On, and Subscribed. The data in the table is as follows:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Travel Requests by Month		Public Reports	VIGNAYA G S	19/10/2023, 8:13 pm	<input type="checkbox"/>
Created by Me	Travel Requests by Department		Public Reports	VIGNAYA G S	19/10/2023, 8:02 pm	<input type="checkbox"/>
Private Reports	Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	17/10/2023, 8:01 pm	<input type="checkbox"/>
Public Reports						
All Reports						
FOLDERS						
All Folders						
Created by Me						
Shared with Me						
FAVORITES						
All Favorites						

On the left side of the page, there is a sidebar with categories: Reports, Recent (3 items), REPORTS, Recent, Created by Me, Private Reports, Public Reports, All Reports, FOLDERS, All Folders, Created by Me, Shared with Me, FAVORITES, and All Favorites. At the bottom of the page, there is a taskbar with various application icons and system status indicators.

Build A Employee Travel Approval Application For Corporates

The screenshot shows a Salesforce report titled "Travel Requests by Department". The report displays 48 total records, with 40 being "Total Out Of State". The data is grouped by department, with subtotals for each group. The columns include Department, Travel Approval: Travel Approval, Status, Out Of State, Destination State, Trip Start Date, and Trip End Date.

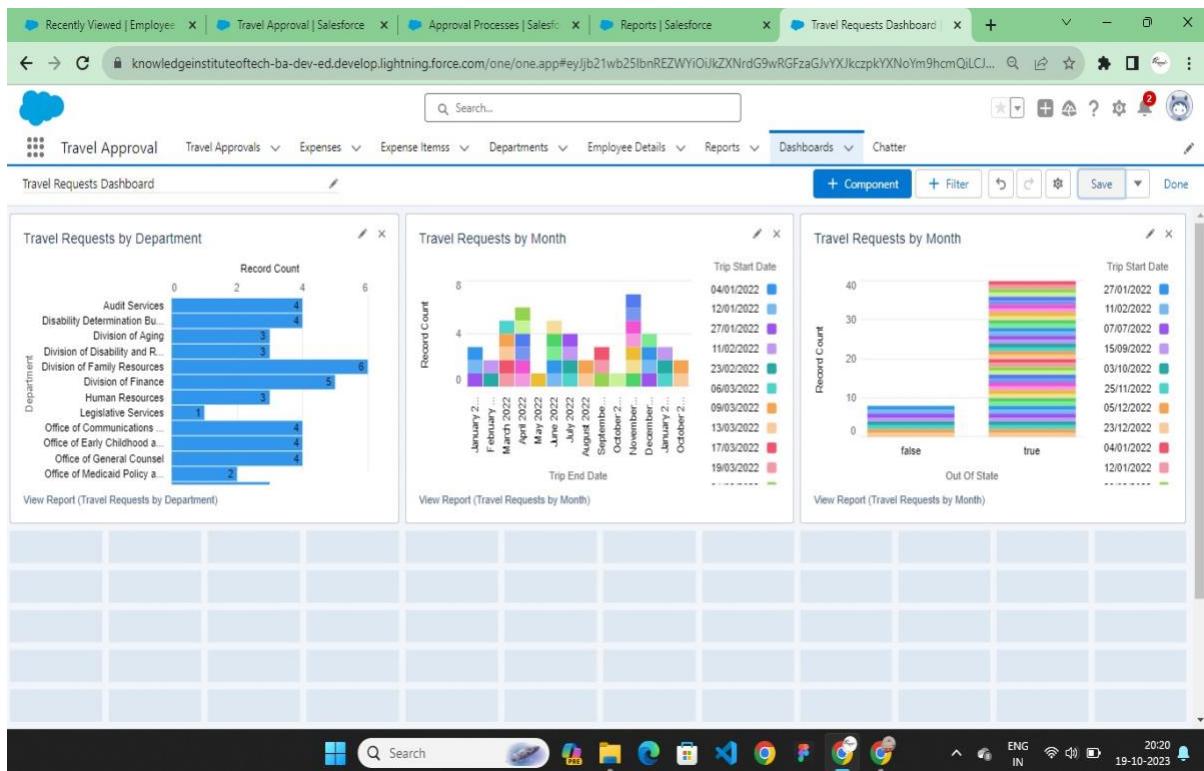
Department	Travel Approval: Travel Approval	Status	Out Of State	Destination State	Trip Start Date	Trip End Date
Audit Services (4)	T-0029	Pending Approval	<input checked="" type="checkbox"/>	FL	31/05/2022	04/06/2022
	T-0033	Approved	<input checked="" type="checkbox"/>	CA	22/11/2022	28/11/2022
	T-0048	Rejected	<input checked="" type="checkbox"/>	CA	07/04/2022	19/04/2022
	T-0005	Rejected	<input checked="" type="checkbox"/>	FL	09/08/2022	15/08/2022
Subtotal					4	
Disability Determination Bureau (4)	T-0030	Rejected	<input type="checkbox"/>	TX	15/09/2022	15/09/2022
	T-0041	Rejected	<input checked="" type="checkbox"/>	OK	20/12/2022	20/12/2022
	T-0006	Draft	<input checked="" type="checkbox"/>	OK	06/03/2022	07/03/2022
	T-0011	Submitted	<input checked="" type="checkbox"/>	CA	05/07/2022	09/07/2022
Subtotal					3	
Division of Aging (3)	T-0035	Rejected	<input checked="" type="checkbox"/>	CA	06/06/2022	22/06/2022
	T-0046	Rejected	<input type="checkbox"/>	TX	11/02/2022	11/02/2022
	T-0017	Rejected	<input checked="" type="checkbox"/>	GA	24/12/2022	08/01/2023
Subtotal					2	

The screenshot shows the Report Builder interface for creating a new report titled "Travel Approvals". The report is set to preview a limited number of records. The fields section includes "Outline" and "Filters". The filters section includes "GROUP ROWS" (Add group...) and "GROUP COLUMNS" (Add group...). The columns section includes "Add column...". The main report area shows travel records grouped by trip end date, with subtotals for each group. The columns include Trip End Date, Trip Start Date, Travel Approval: Travel Approval, Department, Status, Out Of State, and Destination State.

Trip End Date	Trip Start Date	Travel Approval: Travel Approval	Department	Status	Out Of State	Destination State
January 2022 (1)	04/01/2022 (1)	T-0036	Office of Early Childhood and Out-of-School Learning	Rejected	<input checked="" type="checkbox"/>	OK
		Subtotal				1
						1
March 2022 (2)	13/03/2022 (1)	T-0020	Division of Disability and Rehabilitative Services	Rejected	<input checked="" type="checkbox"/>	GA
		Subtotal				1
						1
19/03/2022 (1)	T-0023	Office of Medicaid Policy and Planning	Rejected	<input checked="" type="checkbox"/>	GA	
		Subtotal				1
						2
April 2022 (1)	21/04/2022 (1)	T-0031	Human Resources	Rejected	<input checked="" type="checkbox"/>	FL
		Subtotal				1
						1
June 2022 (3)	31/05/2022 (1)	T-0029	Audit Services	Pending Approval	<input checked="" type="checkbox"/>	FL
		Subtotal				1
						1
08/06/2022 (1)	T-0035	Division of Aging	Rejected	<input checked="" type="checkbox"/>	CA	
		Subtotal				1

5.2 Dashboard

A dashboard provides an interactive visual display of key metrics and trends. Multiple dashboard components can be shown together on a single dashboard layout, creating rich visual displays of multiple reports that have a common theme.



CHAPTER-6

CONCLUSION

In conclusion, A vehicle management system using Salesforce can help businesses of all sizes to improve the efficiency and effectiveness of their fleet management operations. By providing a centralized platform for managing all aspects of the vehicle lifecycle, Salesforce can help businesses to:

- Reduce costs by streamlining vehicle maintenance and repair processes
- Improve safety by tracking vehicle performance and identifying potential problems
- Increase efficiency by optimizing vehicle utilization and dispatching
- Enhance compliance by ensuring that vehicles are properly registered and insured

In addition to these specific benefits, a vehicle management system using Salesforce can also help businesses to improve their overall customer service and employee satisfaction. By providing a more efficient and effective way to manage their fleet, businesses can free up time and resources to focus on other important priorities.

CHAPTER-7

PROJECT DEMONSTRATION

Github:

<https://github.com/M52MADHUMITHA/Salesforce/tree/main>

Demo Link:

<https://youtu.be/mZV5kdVZYf8?si=Ytk6cqhfslt74xor>