

VEHICLE MANAGEMENT SYSTEM USING SALESFORCE

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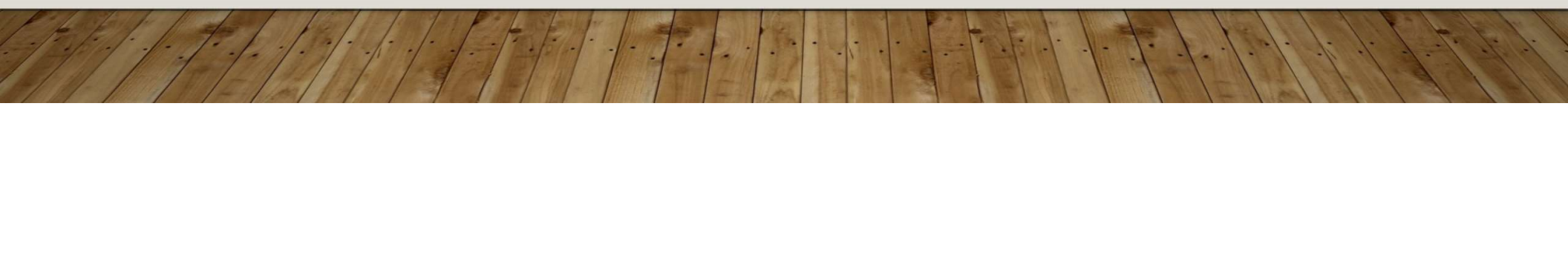
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UNDER THE GUIDENCE OF

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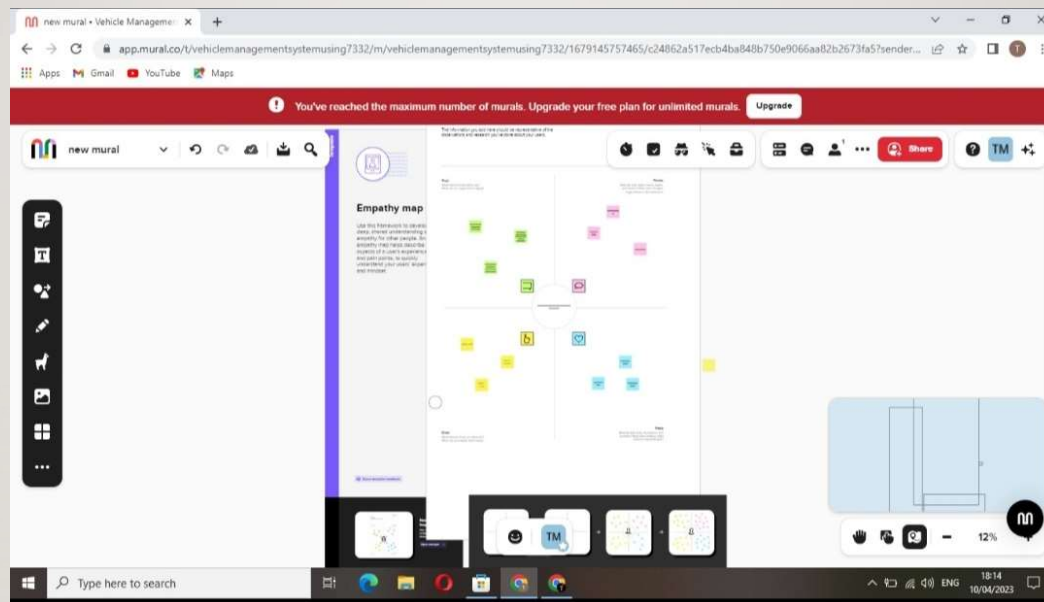
TEAM I'D : NM2023TMID19479



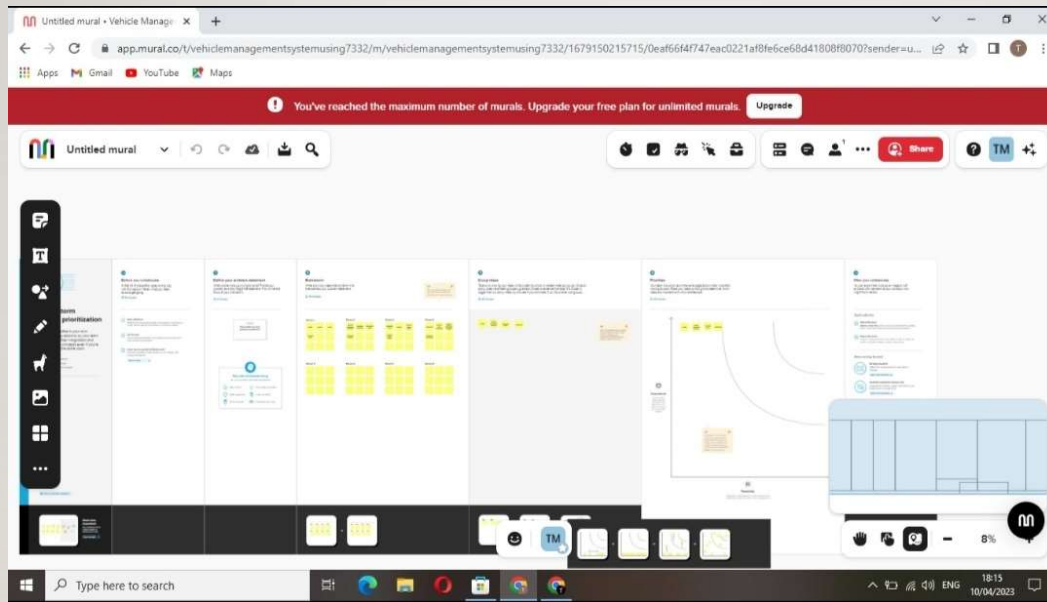
INTRODUCTION

- Vehicle Management is an application where a customer Details are stored in
- order to choose cars, bikes and commercial vehicles for travel within the city. The data which
- is stored here is further used to remind them if any offers are provided during the seasons and
- any updates regarding vehicles are sent to them in the form of messages and mails

EMPATHY MAP



IDEATION & BRAINSTORMING MAP



MILESTONE - I : CREATING DEVELOPER ACCOUNT

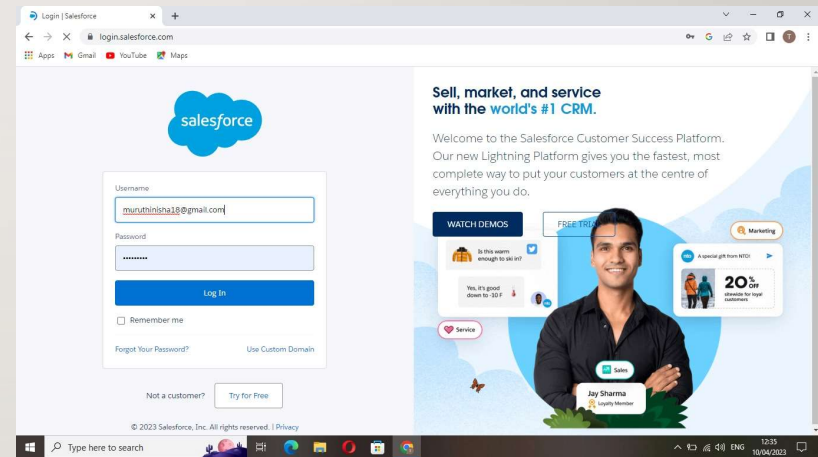
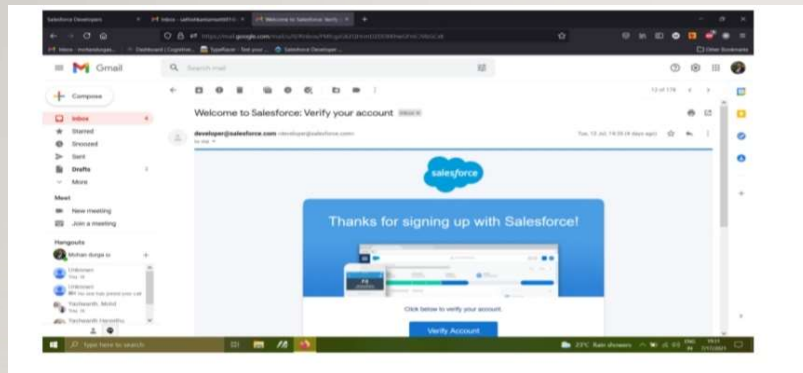
- Activity I:
- Creating Developer Account
- Creating a developer org in salesforce.
- 1. Go to developers.salesforce.com/
- 2. Click on sign up.
- 3. On the sign up form, enter the following details :
 - a. First name & Last name
 - a. Email
 - b. Role : Developer

LOGIN SALESFORCE HOMEPAGE 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.



LOGIN TO YOUR SALESFORCE ACCOUNT

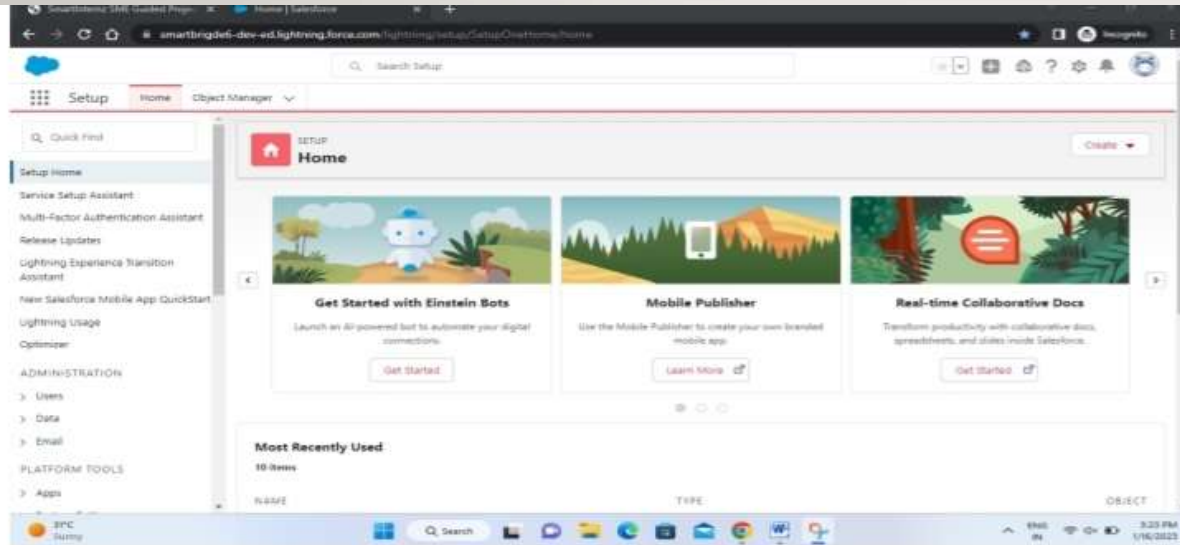


LOGIN SALESFORCE HOMEPAGE LOGIN TO YOUR SALESFORCE ACCOUNT

1.GO TO SALESFORCE.COM AND CLICK ON LOGIN.

2. ENTER THE USERNAME AND PASSWORD THAT YOU JUST CREATED.

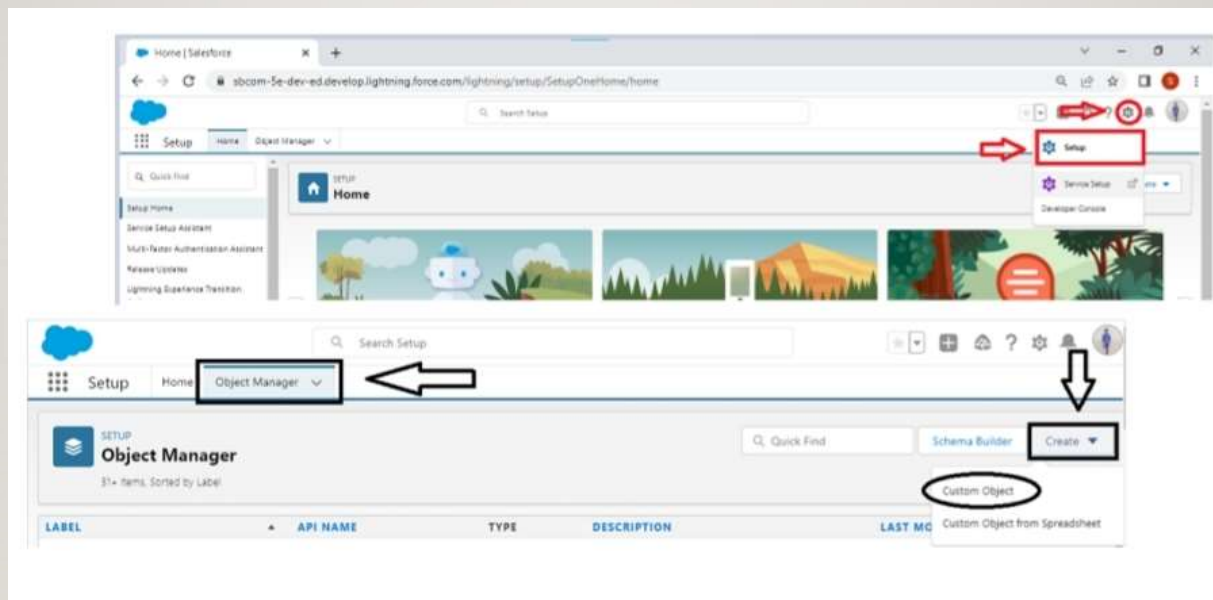
3.AFTER LOGIN THIS IS THE HOME PAGE WHICH YOU WILL SEE.



MILESTONE – 2: OBJECT

- Activity 1:
- To Create an object:
- Creation of Objects for Vehicle Management, For this Vehicle Management we need to
- create 2 objects(i.e)Vehicles ,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

-
- ● 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.



2. OBJECT :VEHICLE

Developer Portal | Salesforce Dev | New Custom Object | Salesforce

mvmuthiahgovernmentartsco48-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/new

Apps Gmail YouTube Maps Translate News

Search Setup

Setup Home Object Manager

SETUP
New Custom Object

New Custom Object [Help for this Page](#)

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

Custom Object Definition Edit [Save](#) [Save & New](#) [Cancel](#)

Custom Object Information [Required Information](#)

The singular and plural labels are used in tabs, page layouts, and reports.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

28 items

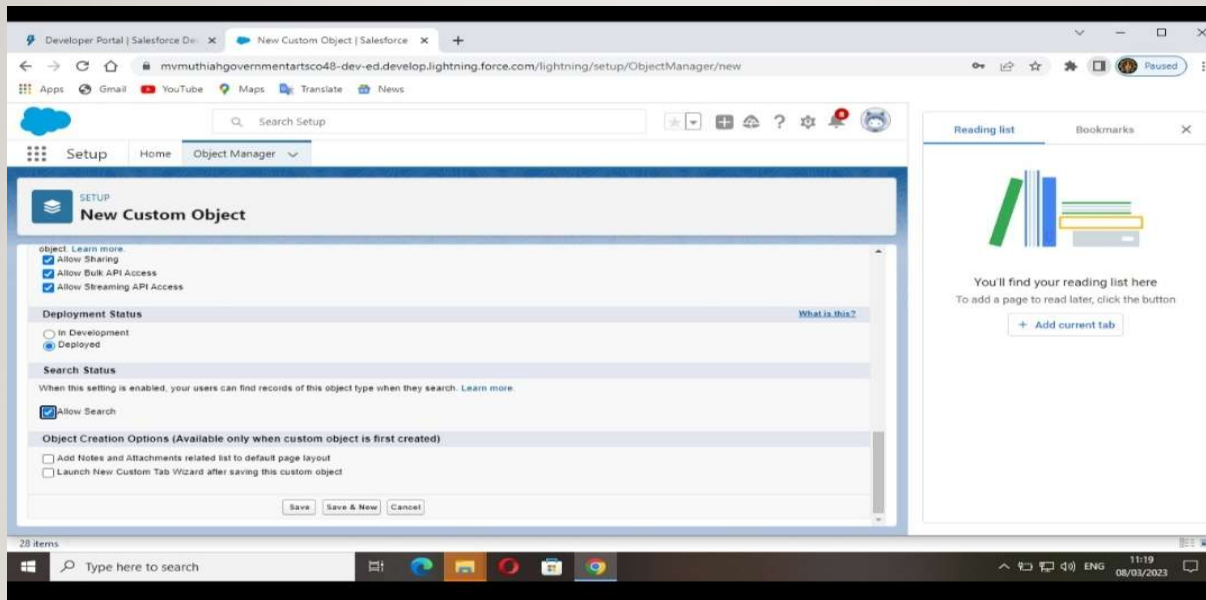
Type here to search

Reading list Bookmarks

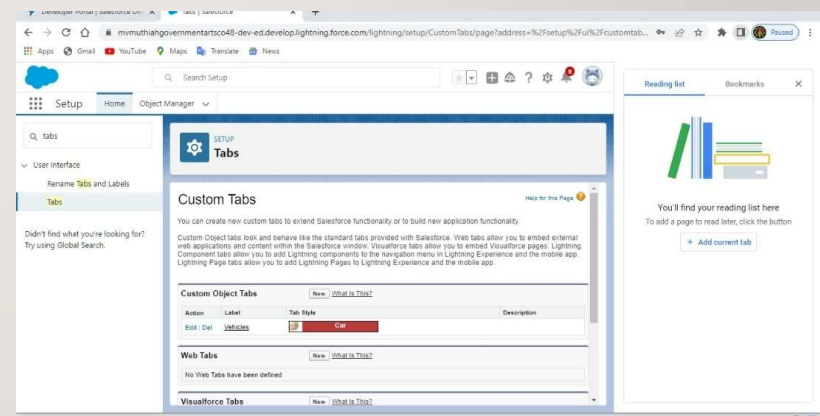
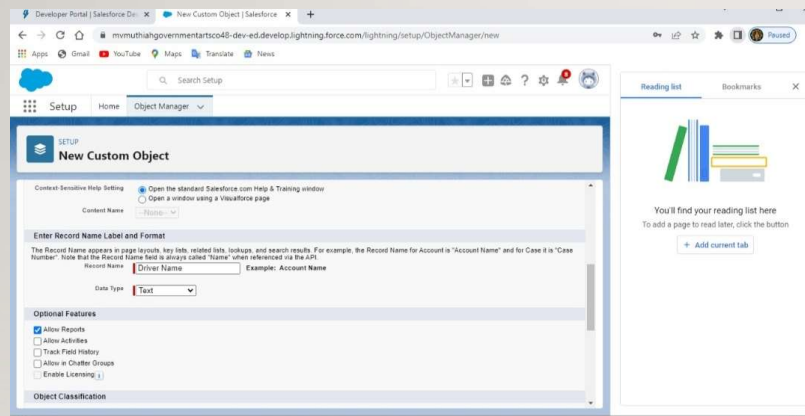
You'll find your reading list here
To add a page to read later, click the button

[+ Add current tab](#)

11:18
08/03/2023



CUSTOM TABS: DRIVERS



MILESTONE -3:

FIELDS AND RELATIONSHIP

- Activity- I:
- Creation of fields:
- Fields in Vehicles objects follow below data types:
- S NO., Field Names, Data Types
- 1. Customer Name - Text
- 2 Customer Mobile No -Number
- 3 Vehicle Type
 - i)2 wheeler
 - ii)4 wheeler
 - Picklist
- 4.
 - 2WHEELERS
 - i) HERO
 - ii)HONDA
 - iii)BAJAJ
 - iv)ROYAL ENFIELD
 - v)TVS
 - vi)KINETIC
 - vii)OLA
 - viii)JAWA
 - 5 .4WHEELERS
 - i) RENAULT
 - ii)SKODA
 - iii) HONDA
 - iv)HYUNDAI
 - v)SUZUKI
 - Picklist

-
- vi) MAHINDRA
 - vii) VOLKSWAGEN
 - viii) BENZ
 - ix) AUDI
 - x) VOLVO
 - 6. Vehicle Name- Text
 - 7. Vehicle No- Text

- 8. Chassis No - Text
- 9. Colour - Text
- 10. Body Type - Text
- 11. Vehicle Includes
 - i) Fire Extinguisher
 - ii) First Aid Kit
 - iii) Multi Charger kit
 - iv) Stepney
 - v) Stereo
 - vi) Tool Kit

- 12. Condition
 - i) Good
 - ii) Medium
 - iii) Least
- Picklist
- 13 Mileage - Text
- 14 Seats- Number
- 15 Start Date - Date/Time
- 16 End Date- Date/Time
- 17 Opportunity- Lookup(opportunities)

FIELDS AND RELATIONSHIP :VEHICLES

The screenshot shows the Salesforce Setup interface for the 'Vehicle' object. The left sidebar contains navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Fields & Relationships' and shows a list of 21 items, sorted by Field Label. The list includes fields like Seats, Start Date, Vehicle Includes, Vehicle Name, Vehicle No, and Vehicle Type, each with its API name and data type. The 'Vehicle Name' field is highlighted in blue.

Field Label	API Name	Data Type	Field Type
Seats	Seats__c	Number(18, 0)	Text
Start Date	Start_Date__c	Date/Time	Text
Vehicle Includes	Vehicle_Includes__c	Picklist (Multi-Select)	Text
Vehicle Name	Vehicle_Name__c	Text(20)	Text
Vehicle Name	Name	Text(80)	Text
Vehicle No	Vehicle_No__c	Text(20)	Text
Vehicle Type	Vehicle_Type__c	Picklist	Text

-
- Activity-2:
 - Fields in Driver objects follow below data types:
 - S No ,Field, Data Type
 - 1.Driver Name -Text
 - 2.Licence No- Text
 - 3 .Mobile No -Number
 - 4 .Fair Per Hour -Text
 - 5 .Vehicle -Lookup(Vehicle)

DRIVERS

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters

Fields & Relationships

21 Items, Sorted by Field Label

Created By	CreatedById	Lookup(User)	
Customer Mobile No	Customer_Mobile_No__c	Number(10, 0)	▼
Customer Name	Customer_Name__c	Text(20)	▼
End Date	End_Date__c	Date/Time	▼
Last Modified By	LastModifiedById	Lookup(User)	
Mileage	Mileage__c	Text(20)	▼
Opportunity	Opportunity__c	Lookup(Opportunity)	✓ ▼

- 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.

-
- • 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

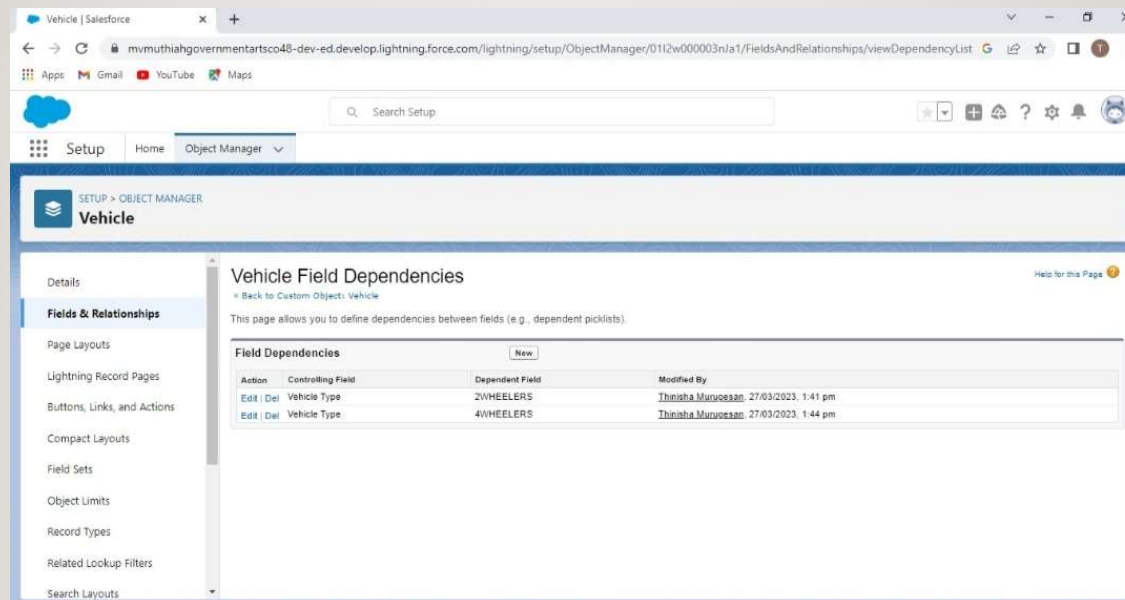
Select the appropriate 2 wheelers Brands in each column by double-clicking them.

- 2WHEELERS :

- i) HERO
- ii) HONDA
- iii) BAJAJ
- iv) ROYAL ENFIELD

- 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.

FIELD DEPENDENCE



The screenshot displays the Salesforce Object Manager interface for a custom object named 'Vehicle'. The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The main content area is titled 'Vehicle Field Dependencies' and includes a 'Back to Custom Objects: Vehicle' link. Below the title, a descriptive text states: 'This page allows you to define dependencies between fields (e.g., dependent picklists)'. A table titled 'Field Dependencies' lists two dependencies. The first dependency shows 'Vehicle Type' as the Controlling Field and '2WHEELERS' as the Dependent Field. The second dependency shows 'Vehicle Type' as the Controlling Field and '4WHEELERS' as the Dependent Field. Both dependencies were modified by 'Thirisha Muresan' on 27/03/2023 at 1:41 pm and 1:44 pm respectively. The table has columns for 'Action', 'Controlling Field', 'Dependent Field', and 'Modified By'.

Action	Controlling Field	Dependent Field	Modified By
Edit Del	Vehicle Type	2WHEELERS	Thirisha Muresan, 27/03/2023, 1:41 pm
Edit Del	Vehicle Type	4WHEELERS	Thirisha Muresan, 27/03/2023, 1:44 pm

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- I:
- 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.

The screenshot shows the Salesforce Lightning App Builder interface for an app named 'Vehicle Management'. The browser address bar indicates the URL: `mvmuthiahgovernmantartsco48-dev-ed.develop.lightning.force.com/visualEditor/appBuilder.app?id=02u2w000004e8VQAA2&retUrl=https%3A%2F%2Fmvmuthia...`. The interface has a dark blue header with navigation tabs: 'Lightning App Builder', 'App Settings', 'Pages', and 'Vehicle Management'. A left sidebar under 'App Settings' lists 'App Details & Branding' (selected), 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The main content area is titled 'App Details & Branding' and includes instructions: 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.' It is divided into two columns: 'App Details' and 'App Branding'. The 'App Details' column contains fields for 'App Name' (filled with 'Vehicle Management'), 'Developer Name' (filled with 'Vehicle_Management'), and 'Description' (placeholder 'Enter a description...'). The 'App Branding' column contains an 'Image' upload area, a 'Primary Color Hex Value' dropdown (set to '#0070D2'), and an 'Org Theme Options' checkbox (unchecked, labeled 'Use the app's image and color instead of the org's custom theme'). At the bottom, an 'App Launcher Preview' shows a blue square icon with 'VM' and a button labeled 'Vehicle Management'.

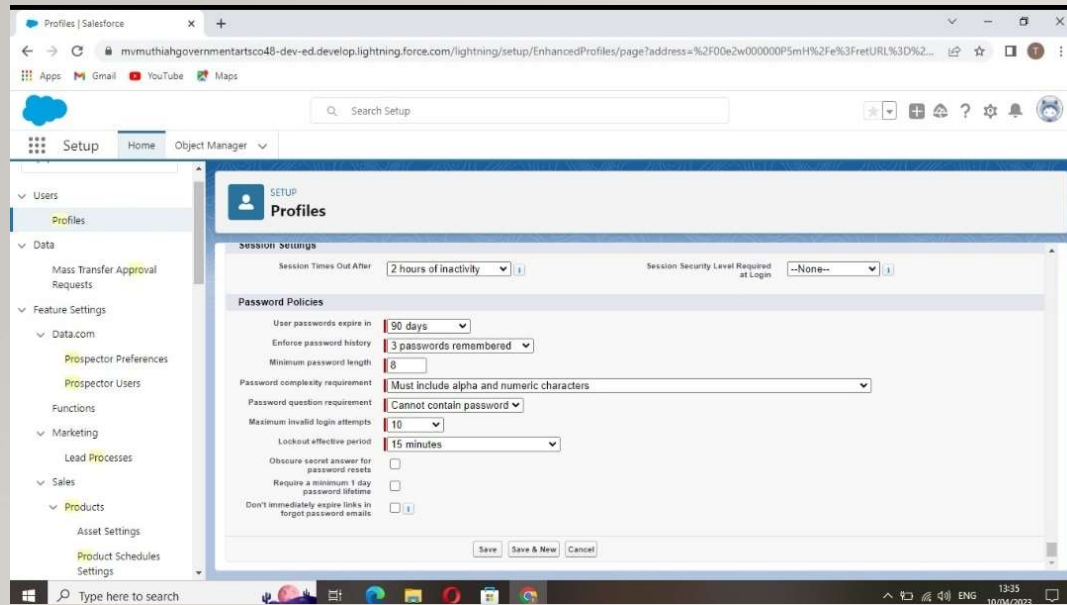
MILESTONE-5: PROFILE

- 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 I:
- Creating a Profiles: Now create a Vehicle Manager profile and set its object permission .
- 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

The screenshot displays the Salesforce Setup interface for editing a profile named 'Vehicle Manager'. The left sidebar shows the navigation menu with 'Profiles' selected. The main content area is titled 'Profile Edit: Vehicle Manager' and includes a 'Set the permissions and page layouts for this profile.' instruction. Below this, the 'Profile Edit' section shows the profile name 'Vehicle Manager', user license 'Salesforce', and a checked 'Custom Profile' checkbox. The 'Custom App Settings' section is visible, showing a table of application settings with 'Visible' and 'Default' columns.

	Visible	Default		Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>

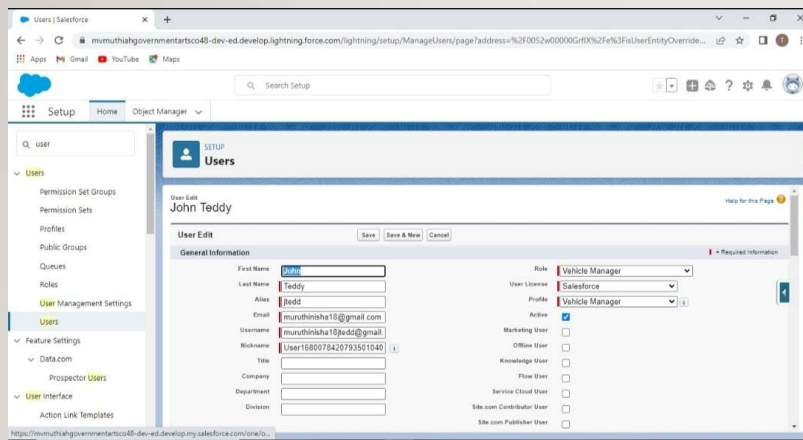


- Setup Roles:
- 1. Click on the Gear Icon
- 2. Click "Setup"
- 3. In the Quick Find box, enter "Roles"
- 4. Click "Roles"
- 5. Click on "Set Up Roles"
- 6. Click "Expand All"
- 7. Under the CEO, click on "Add Role"
- 8. Fill up the Label as Vehicle Manager, Role Name Vehicle_Manager.
- 9. Enter a Role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

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 I:
- Creating a Users:
 - 1. From Setup, in the Quick Find box, enter Users, and then select Users.
 - 2. Click New User.

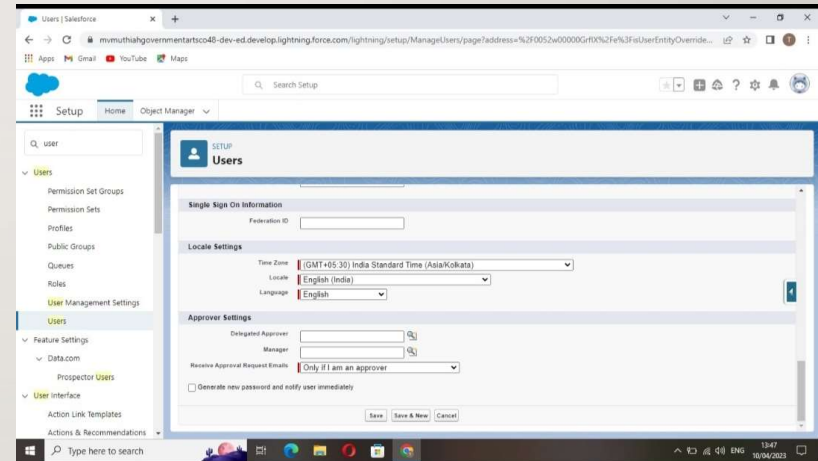
USER :



This screenshot shows the 'User Edit' page for a user named John Teddy in the Salesforce Setup interface. The page is divided into several sections:

- General Information:** Includes fields for First Name (John), Last Name (Teddy), Alias (jtedd), Email (muruthinikshu18@gmail.com), Username (muruthinikshu18@gmail.com), Nickname (User160079420793501040), Title, Company, Department, and Division.
- Roles:** A dropdown menu showing 'Vehicle Manager' as the selected role.
- User License:** A dropdown menu showing 'Salesforce' as the selected license.
- Profile:** A dropdown menu showing 'Vehicle Manager' as the selected profile.
- Actions:** A list of checkboxes for various user roles: Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, and Site.com Publisher User.

The left sidebar contains navigation links for Setup, Home, Object Manager, and a search bar. The top navigation bar includes links for Setup, Home, Object Manager, and a search bar.



This screenshot shows the 'User Edit' page for a user named John Teddy in the Salesforce Setup interface. The page is divided into several sections:

- Single Sign On Information:** Includes a field for Federation ID.
- Locale Settings:** Includes dropdown menus for Time Zone (GMT+05:30 India Standard Time (Asia/Kolkata)), Locale (English (India)), and Language (English).
- Approver Settings:** Includes fields for Delegated Approver and Manager, and a dropdown menu for Receive Approval Request Emails (Only if I am an approver).
- Generate new password and notify user immediately:** A checkbox option.

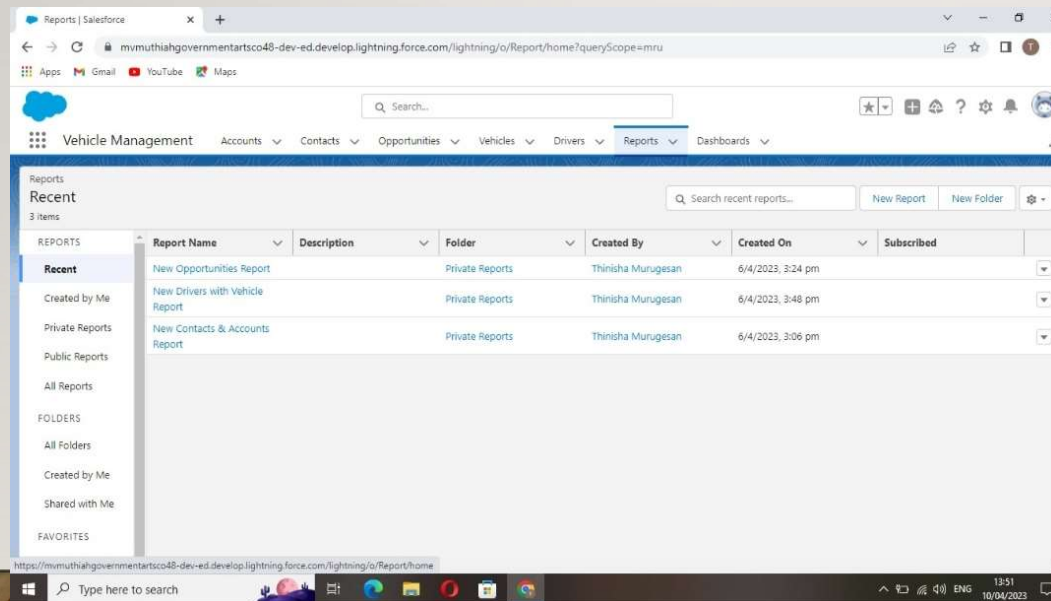
The left sidebar contains navigation links for Setup, Home, Object Manager, and a search bar. The top navigation bar includes links for Setup, Home, Object Manager, and a search bar.

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 I:
- 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.

REPORTS :

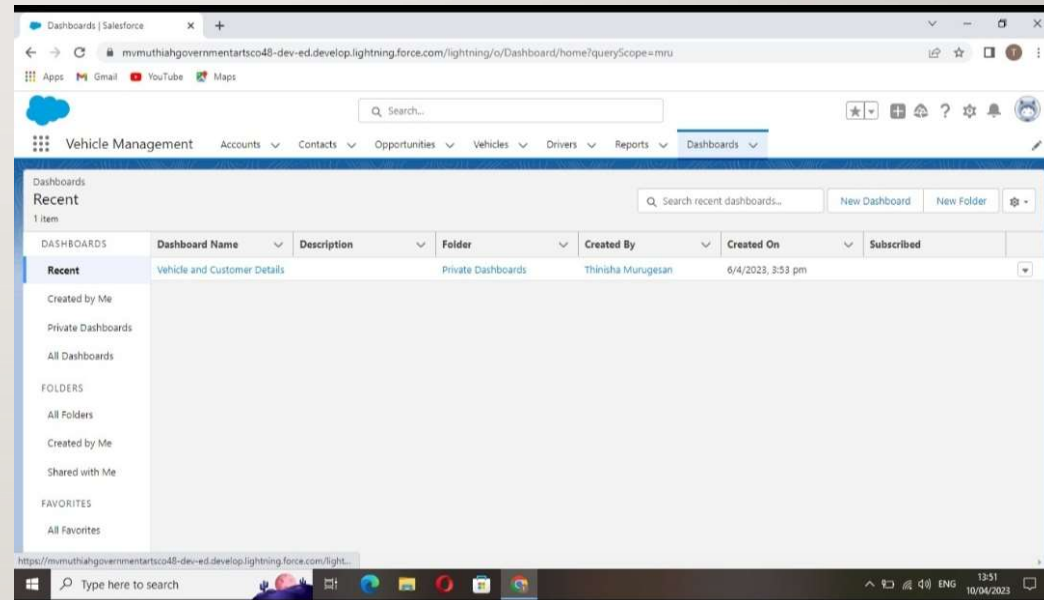


The screenshot displays the Salesforce Reports interface. The top navigation bar includes the Salesforce logo, a search bar, and a menu with options like Vehicle Management, Accounts, Contacts, Opportunities, Vehicles, Drivers, Reports, and Dashboards. The main content area is titled 'Reports' and shows a 'Recent' section with 3 items. A table lists these reports with columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. The table contains three entries: 'New Opportunities Report', 'New Drivers with Vehicle Report', and 'New Contacts & Accounts Report'. A left sidebar provides navigation options for reports, folders, and favorites.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Opportunities Report		Private Reports	Thinisha Murugesan	6/4/2023, 3:24 pm	
Created by Me	New Drivers with Vehicle Report		Private Reports	Thinisha Murugesan	6/4/2023, 3:48 pm	
Private Reports	New Contacts & Accounts Report		Private Reports	Thinisha Murugesan	6/4/2023, 3:06 pm	

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.



CONCLUSION

- Our project is only a humble venture to satisfy the needs manage their project work several user friendly Coding have also adopted. This package shall prove to be a powerful in satisfying all the requirements of the school. The objective of software planning is to provide a frame work enables the manager to make reasonable estimates made within a limited time frame at the beginning of the software project and should be updated regularly as the project progresses.



Thank you