

Vehicle Management System using Salesforce

1 INTRODUCTION

1.1 Overview

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you. Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?"

1.2 Purpose

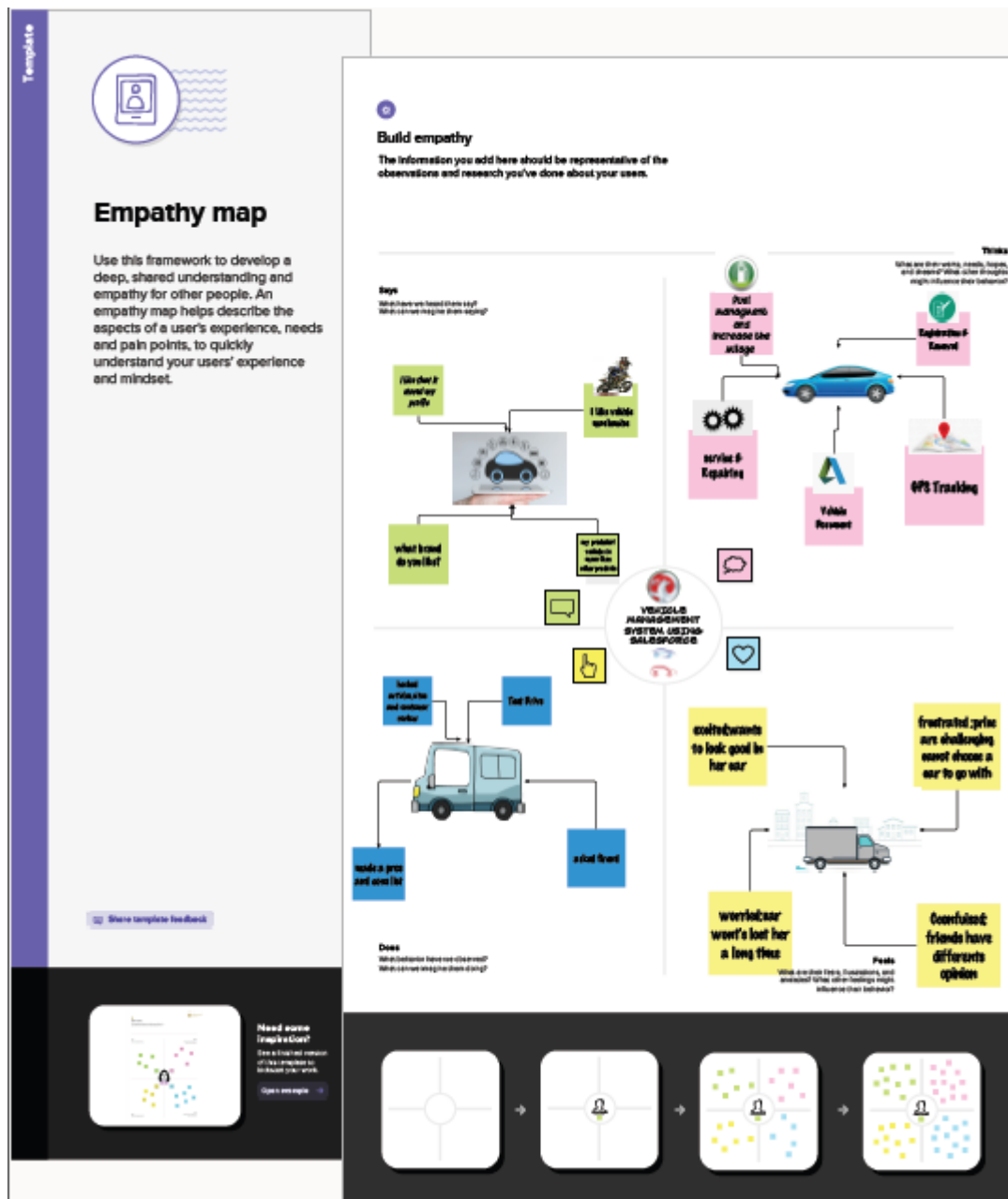
The purpose of vehicle management is to ensure that all vehicles are operating efficiently, safely, and cost-effectively.

In a business context, effective vehicle management can improve operational efficiency, reduce maintenance costs, and increase profitability. For example, a company that relies on a fleet of delivery trucks may use vehicle management software to track the location

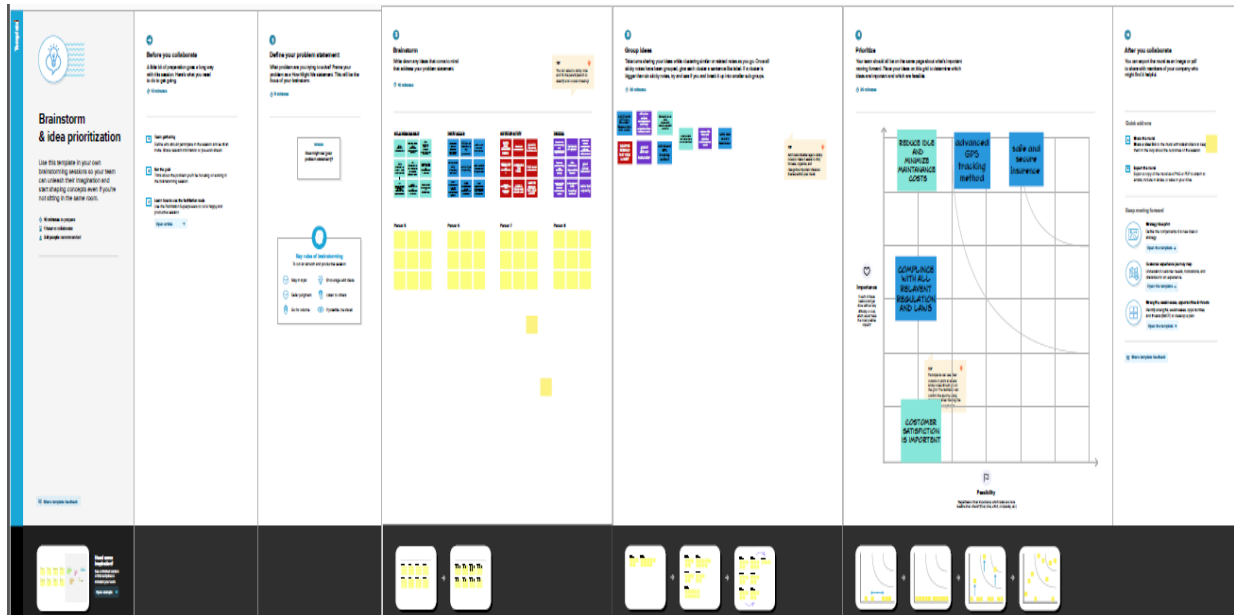
and performance of each vehicle, schedule regular maintenance, and monitor fuel consumption to identify cost-saving opportunities.

2 Problem Definition & Design Thinking

2.1 Empathy Map



2.2 Ideation & Brainstorming Map



3 RESULT

3.1 Data Model

OBJECT NAME	FIELDS IN THE OBJECT	
Customer Name		
	FIELD LABEL	DATA TYPE
	Customer Name	TEXT

Customer Mobile No	<table> <tr> <th data-bbox="657 284 1038 374">FIELD LABEL</th><th data-bbox="1038 284 1449 374">DATA TYPE</th></tr> <tr> <td data-bbox="657 374 1038 530">Customer Mobile No</td><td data-bbox="1038 374 1449 530">NUMBER</td></tr> </table>	FIELD LABEL	DATA TYPE	Customer Mobile No	NUMBER
FIELD LABEL	DATA TYPE				
Customer Mobile No	NUMBER				
Vehicle Type i)2 wheeler ii)4 wheeler	<table> <tr> <th data-bbox="657 636 1038 725">FIELD LABEL</th><th data-bbox="1038 636 1449 725">DATA TYPE</th></tr> <tr> <td data-bbox="657 725 1038 907"> i)2 wheeler ii)4 wheeler </td><td data-bbox="1038 725 1449 907">PICKLIST</td></tr> </table>	FIELD LABEL	DATA TYPE	i)2 wheeler ii)4 wheeler	PICKLIST
FIELD LABEL	DATA TYPE				
i)2 wheeler ii)4 wheeler	PICKLIST				

2WHEELERS i) HERO ii)HONDA iii)BAJAJ iv)ROYAL ENFIELD v)TVS vi)KINETIC vii)OLA viii)JAWA ix)SD x)BATTERY	<table> <tr> <th data-bbox="667 282 1023 389">FIELD LABEL</th><th data-bbox="1023 282 1441 389">DATA TYPE</th></tr> <tr> <td data-bbox="667 389 1023 1350"> i) HERO ii)HONDA iii)BAJAJ iv)ROYAL ENFIELD v)TVS vi)KINETIC vii)OLA viii)JAWA ix)SD x)BATTERY </td><td data-bbox="1023 389 1441 1350"> PICKLIST </td></tr> </table>	FIELD LABEL	DATA TYPE	i) HERO ii)HONDA iii)BAJAJ iv)ROYAL ENFIELD v)TVS vi)KINETIC vii)OLA viii)JAWA ix)SD x)BATTERY	PICKLIST
FIELD LABEL	DATA TYPE				
i) HERO ii)HONDA iii)BAJAJ iv)ROYAL ENFIELD v)TVS vi)KINETIC vii)OLA viii)JAWA ix)SD x)BATTERY	PICKLIST				

4WHEELERS	FIELD LABEL		DATA TYPE
	i) RENAULT ii)SKODA iii) HONDA iv)HYUNDAI v)SUZUKI vi)MAHINDRA vii)VOLKSWAGEN viii)BENZ ix)AUDI x)VOLVO		PICKLIST
Vehicle Name	FIELD LABEL		DATA TYPE
	Vehicle Name		TEXT
Vehicle No	FIELD LABEL		DATA TYPE
	Vehicle No		TEXT

Chassic No	<table><tr><th>FIELD LABEL</th><th>DATA TYPE</th></tr><tr><td>Chassic No</td><td>TEXT</td></tr></table>	FIELD LABEL	DATA TYPE	Chassic No	TEXT
FIELD LABEL	DATA TYPE				
Chassic No	TEXT				
Colour	<table><tr><th>FIELD LABEL</th><th>DATA TYPE</th></tr><tr><td>Colour</td><td>TEXT</td></tr></table>	FIELD LABEL	DATA TYPE	Colour	TEXT
FIELD LABEL	DATA TYPE				
Colour	TEXT				
Body Type	<table><tr><th>FIELD LABEL</th><th>DATA TYPE</th></tr><tr><td>Body Type</td><td>TEXT</td></tr></table>	FIELD LABEL	DATA TYPE	Body Type	TEXT
FIELD LABEL	DATA TYPE				
Body Type	TEXT				

Vehicle Includes	<table border="1"> <thead> <tr> <th data-bbox="791 282 1128 371">FIELD LABEL</th><th data-bbox="1128 282 1474 371">DATA TYPE</th></tr> </thead> <tbody> <tr> <td data-bbox="791 371 1128 1440"> i)Fire Extenuation ii)First Aid Kit iii)Multi Charger kit iv)Stepney v)Stereo vi)Tool Kit vii)Tracking Device viii)Tyre Jack </td><td data-bbox="1128 371 1474 1440">Multi Picklist</td></tr> </tbody> </table>	FIELD LABEL	DATA TYPE	i)Fire Extenuation ii)First Aid Kit iii)Multi Charger kit iv)Stepney v)Stereo vi)Tool Kit vii)Tracking Device viii)Tyre Jack	Multi Picklist
FIELD LABEL	DATA TYPE				
i)Fire Extenuation ii)First Aid Kit iii)Multi Charger kit iv)Stepney v)Stereo vi)Tool Kit vii)Tracking Device viii)Tyre Jack	Multi Picklist				
Condition	<table border="1"> <thead> <tr> <th data-bbox="791 1563 1128 1653">FIELD LABEL</th><th data-bbox="1128 1563 1474 1653">DATA TYPE</th></tr> </thead> <tbody> <tr> <td data-bbox="791 1653 1128 1933"> i)Good ii)Medium iii)Least </td><td data-bbox="1128 1653 1474 1933">PICKLIST</td></tr> </tbody> </table>	FIELD LABEL	DATA TYPE	i)Good ii)Medium iii)Least	PICKLIST
FIELD LABEL	DATA TYPE				
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Mileage	<table> <tr> <th>FIELD LABEL</th><th>DATA TYPE</th></tr> <tr> <td>Mileage</td><td>TEXT</td></tr> </table>	FIELD LABEL	DATA TYPE	Mileage	TEXT
FIELD LABEL	DATA TYPE				
Mileage	TEXT				
Seats	<table> <tr> <th>FIELD LABEL</th><th>DATA TYPE</th></tr> <tr> <td>Seats</td><td>Number</td></tr> </table>	FIELD LABEL	DATA TYPE	Seats	Number
FIELD LABEL	DATA TYPE				
Seats	Number				
Start Date	<table> <tr> <th>FIELD LABEL</th><th>DATA TYPE</th></tr> <tr> <td>Start Date</td><td>Date/Time</td></tr> </table>	FIELD LABEL	DATA TYPE	Start Date	Date/Time
FIELD LABEL	DATA TYPE				
Start Date	Date/Time				
End Date	<table> <tr> <th>FIELD LABEL</th><th>DATA TYPE</th></tr> <tr> <td>End Date</td><td>Date/Time</td></tr> </table>	FIELD LABEL	DATA TYPE	End Date	Date/Time
FIELD LABEL	DATA TYPE				
End Date	Date/Time				
Opportunity	<table> <tr> <th>FIELD LABEL</th><th>DATA TYPE</th></tr> <tr> <td>Opportunity</td><td>Lookup(opportunities)</td></tr> </table>	FIELD LABEL	DATA TYPE	Opportunity	Lookup(opportunities)
FIELD LABEL	DATA TYPE				
Opportunity	Lookup(opportunities)				

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)

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

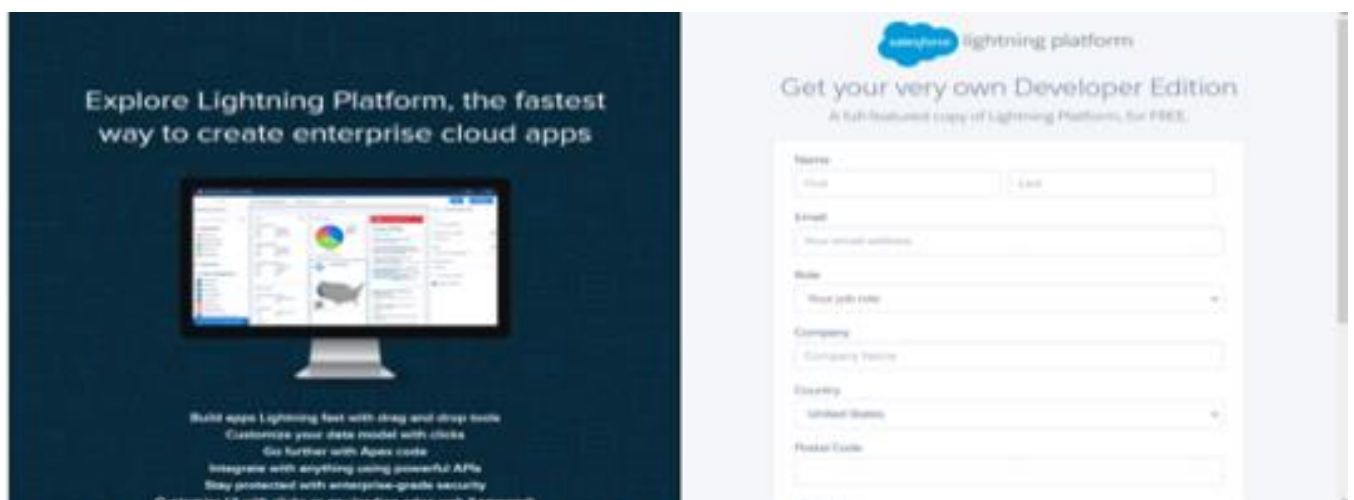
e. Postal Code : pin code

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

Click on sign up after filling these.

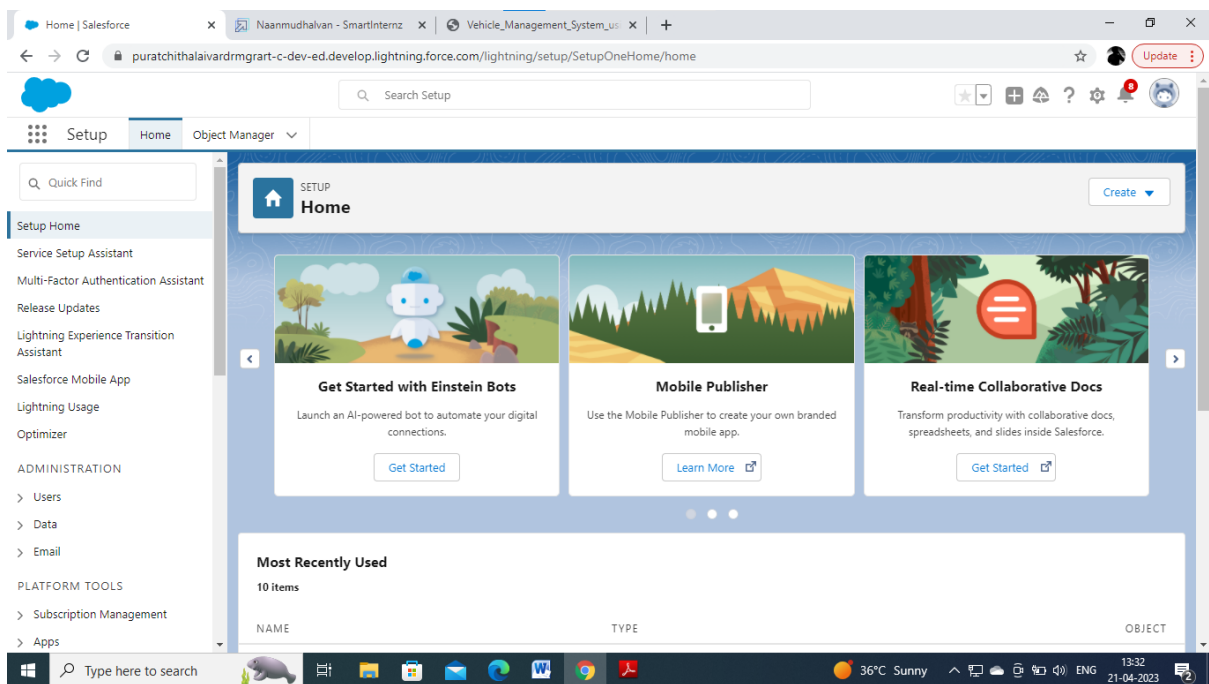


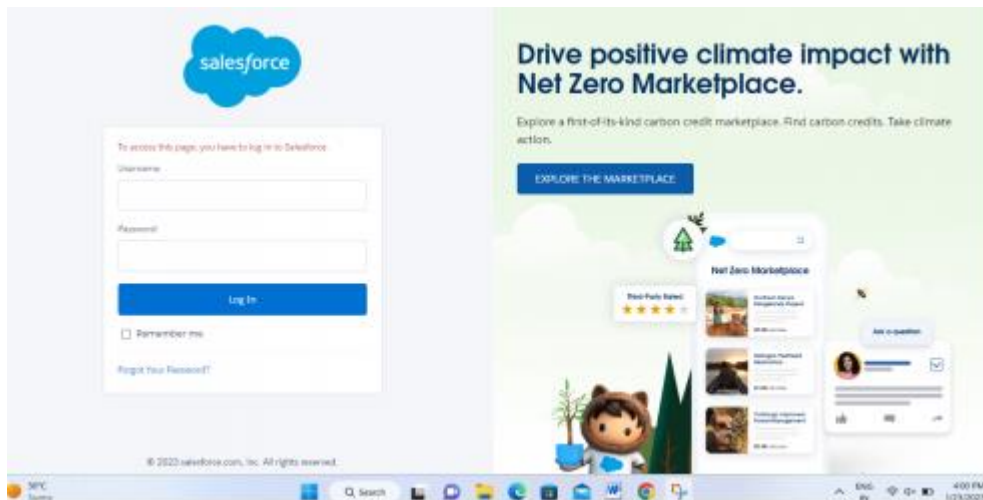
Account Activation

Go to the inbox of the email that you used while signing up.

Click on the verify account to

activate your account. The email may take 5-10mins, as





Activity 2:

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

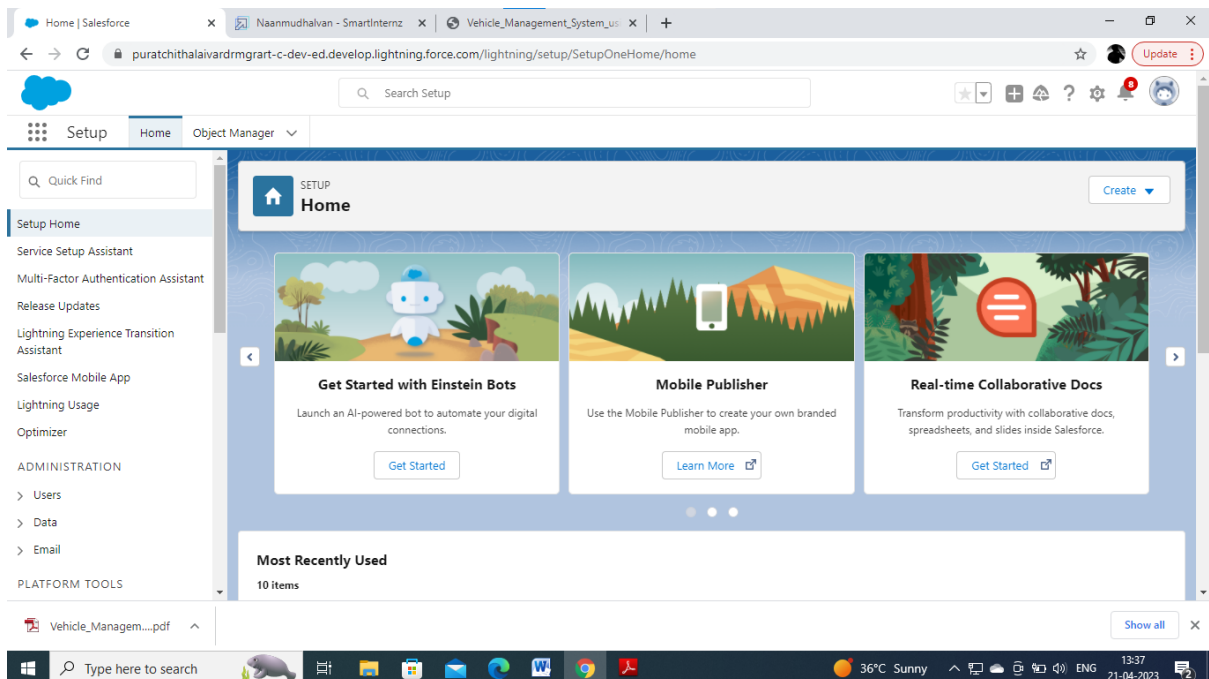
Dropdown click on that and select Custom Object.

- Creation of Vehicle Object

On the Custom Object Definition page, create the object as follows:

- Label: Vehicle

- Plural Label: Vehicles
- 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.



← → ↻ puratchithalaivardmgrart-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home

Setup Home Object Manager

Object Manager

51+ Items, Sorted by Label

Search Setup

Quick Find

Setup

Service Setup

Developer Console

Vehicle | Salesforce

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Vehicle_Management_System_us

← → ↻ puratchithalaivardmgrart-c-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/0112w000003RxXN/edit?address=%2F0112w000003RxXN%2Fe%3FretU...

Setup Home Object Manager

Vehicle

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Edit Custom Object

Vehicle

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label Vehicle Example: Account

Plural Label Vehicles Example: Accounts

Starts with vowel sound ☐

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

Object Name Vehicle Example: Account

Description

Vehicle_Managem....pdf

Show all

Type here to search

36°C Sunny

ENG

13:43

21-04-2023

Vehicle | Salesforce

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Vehicle_Management_System_us

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Setup Home Object Manager

Vehicle

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Allow in Chatter Groups

Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

Allow Sharing ☒

Allow Bulk API Access ☒

Allow Streaming API Access ☒

Deployment Status

In Development ☐

Deployed ☒

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

Allow Search ☒

Save Save & New Cancel

Vehicle_Managem....pdf

Show all

Type here to search

36°C Sunny

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Activity 3:

To Create a driver object continue the same steps Which is followed for the above object.

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Activity-4:

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 ix)SD x)BATTERY	Picklist
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.	Chassic No	Text
9.	Colour	Text
10.	Body Type	Text
11.	Vehicle Includes i)Fire Extenuation ii)First Aid Kit iii)Multi Charger kit iv)Stepney v)Stereo vi)Tool Kit vii)Tracking Device viii)Tyre Jack	Multi Picklist
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 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)

Now click on “Fields & Relationships” → New

The screenshot shows the Salesforce Setup interface for the 'Vehicle' object. The 'Fields & Relationships' section is active, displaying a list of 26 fields. The fields are sorted by Field Label. The table below shows the first few fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
2WHEELERS	X2WHEELERS__c	Picklist		
4WHEELERS	X4WHEELERS__c	Picklist		
Body Type	Body_Type__c	Text(30)		
Chassic No	Chassic_No__c	Text(30)		
Colour	Colour__c	Text(30)		
Condition	Condition__c	Picklist		

Fill the field label name → Next → Next → Save.

The screenshot shows the 'Custom Field Definition Edit' page for the 'Vehicle' object. The 'Field Information' section is active, and the 'Field Label' is set to '2WHEELERS'. The 'Data Type' is set to 'Picklist'. The 'Field Name' is 'X2WHEELERS'. The 'Description' and 'Help Text' fields are empty. The 'Data Owner' is set to 'User'. The 'Field Usage' is set to '--None--'. The 'Data Sensitivity Level' is set to '--None--'. The 'Compliance Categorization' section shows 'Available' and 'Chosen' lists.

Field Label	Field Name	Data Type
2WHEELERS	X2WHEELERS	Picklist

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

ix)SD

x)BATTERY

Picklist

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. Chassic No Text

9. Colour Text

10. Body Type Text

11. Vehicle Includes

i)Fire Extenuation

ii)First Aid Kit

iii)Multi Charger kit

iv)Stepney

v)Stereo

vi)Tool Kit

vii)Tracking Device

viii)Tyre Jack

Multi Picklist

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)

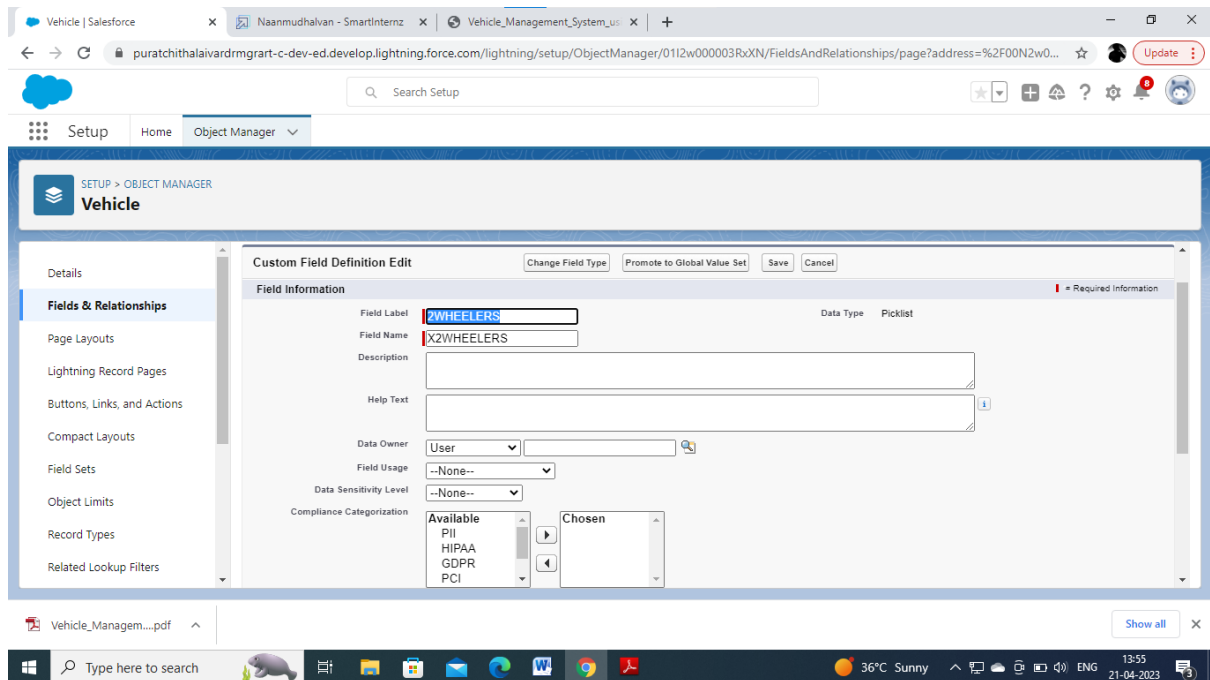
Now click on “Fields & Relationships” → New

The screenshot shows the Salesforce Object Manager interface for the 'Vehicle' object. The 'Fields & Relationships' tab is selected, displaying a list of 26 fields. The table below shows the first six fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
2WHEELERS	X2WHEELERS__c	Picklist		
4WHEELERS	X4WHEELERS__c	Picklist		
Body Type	Body_Type__c	Text(30)		
Chassic No	Chassic_No__c	Text(30)		
Colour	Colour__c	Text(30)		
Condition	Condition__c	Picklist		

The interface includes a sidebar with navigation options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The top navigation bar shows 'Setup', 'Home', and 'Object Manager'. The bottom status bar displays system information like temperature (36°C) and date (21-04-2023).

Fill the field label name → Next → Next → Save



Activity-5:

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)

Now click on “Fields & Relationships” → New

Fill the field label name → Next → Next → Save.

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.

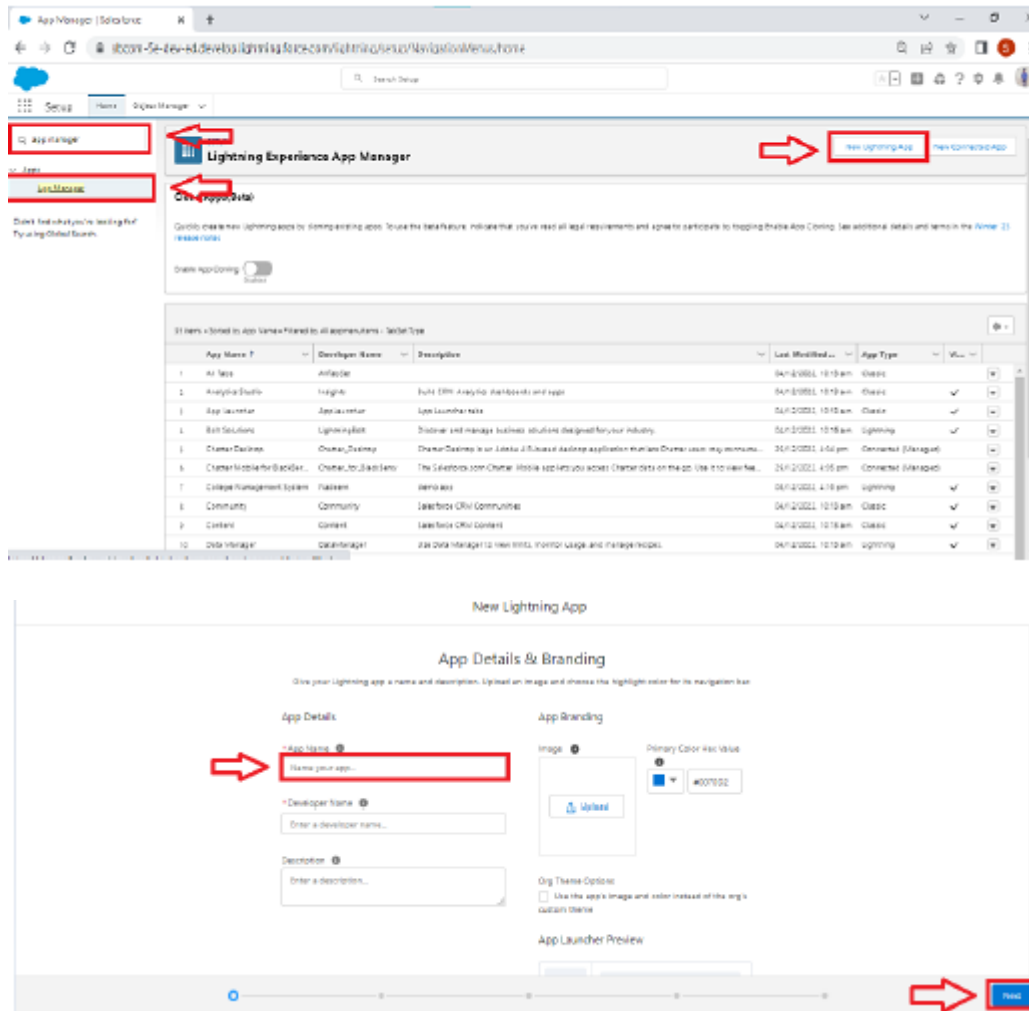
Now click on “Fields & Relationships” → New

Fill the field label name → Next → Next → Save.

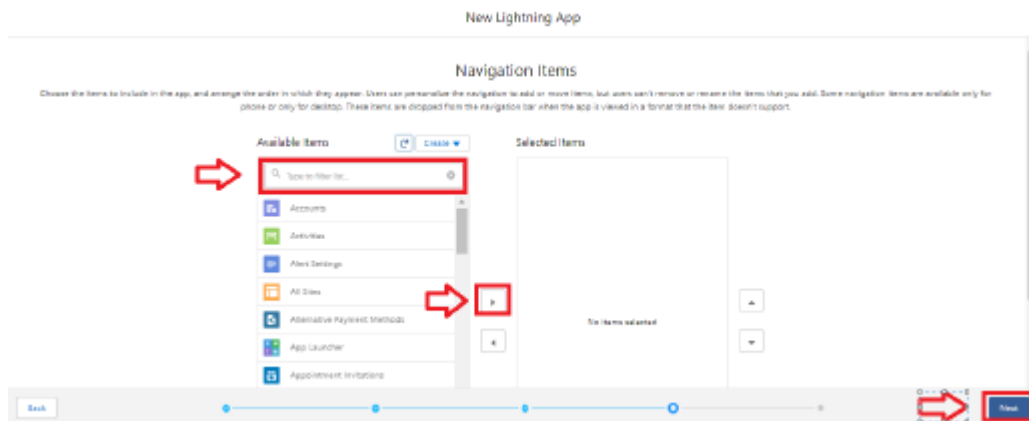
Milestone-4:Lightning App

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.

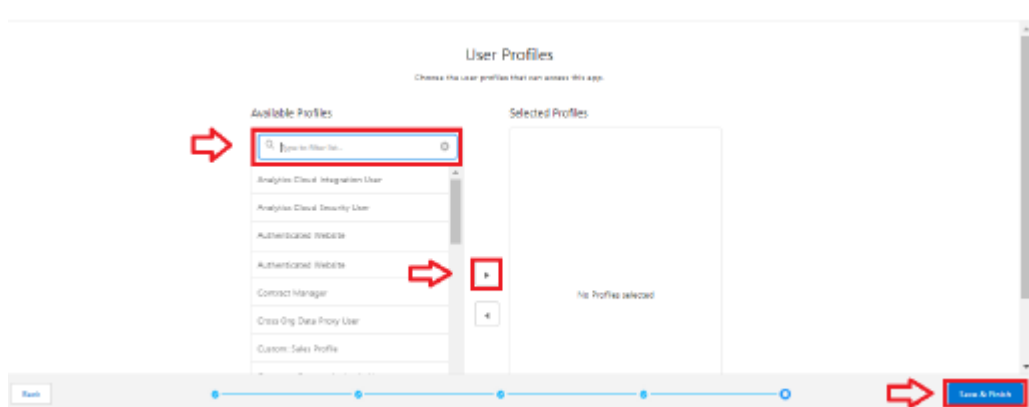


Select the items from the search bar and move it using the arrow button → Next.



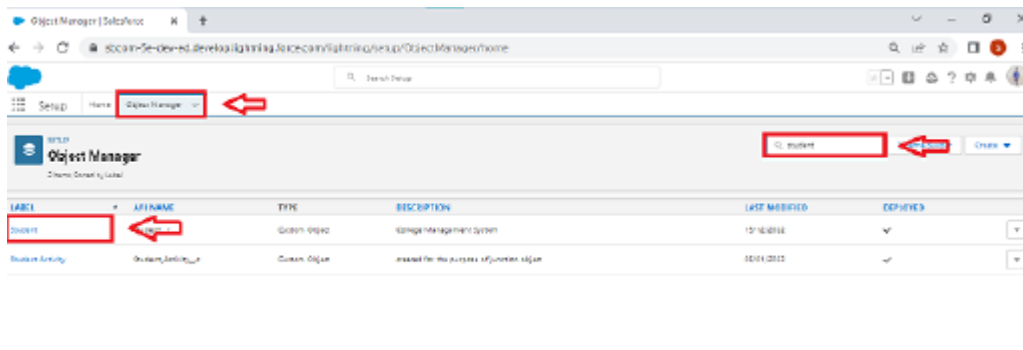
To Add User Profiles:

Search profiles in search bar → click on the arrow button → save & finish.



To create fields in an object:

Go to setup → click on Object Manager → type object name in search bar → click on the object.



To create

Activity-6:

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.

To Add Navigation Items:

Select the items from the search bar and move it using the arrow button → Next.

To Add User Profiles:

Search profiles in search bar → click on the arrow button → save & finish.

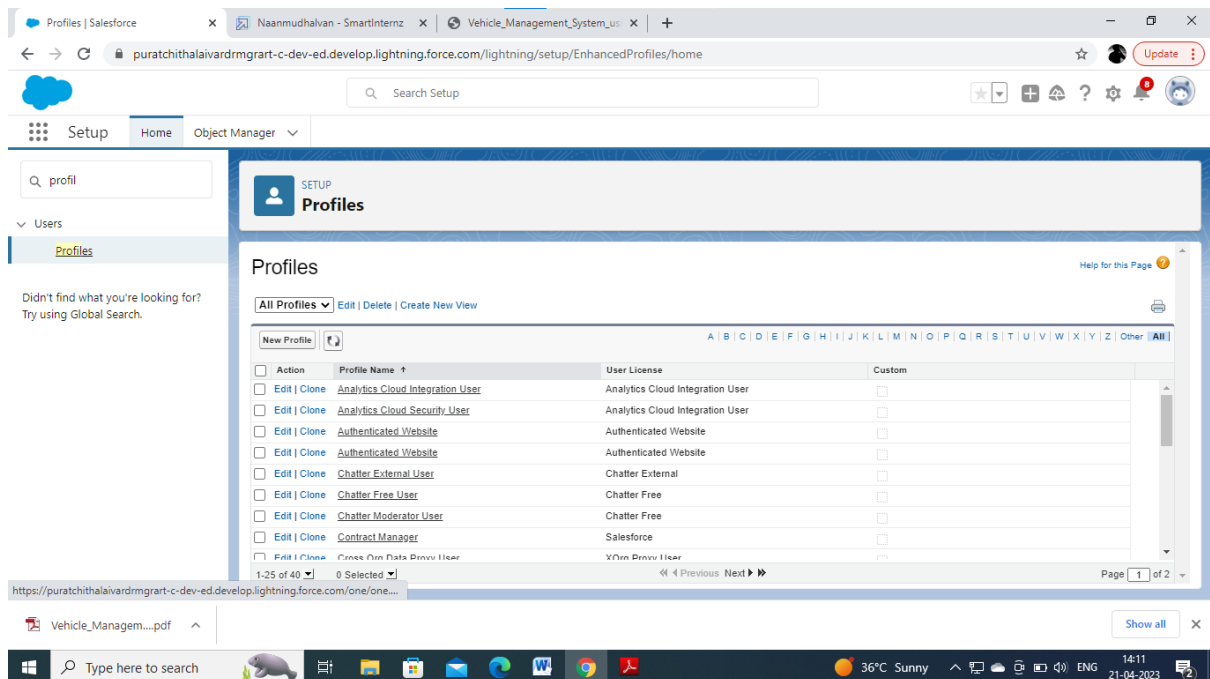
To create fields in an object:

Go to setup → click on Object Manager → type object name in search bar → click on the object.

Activity 7:

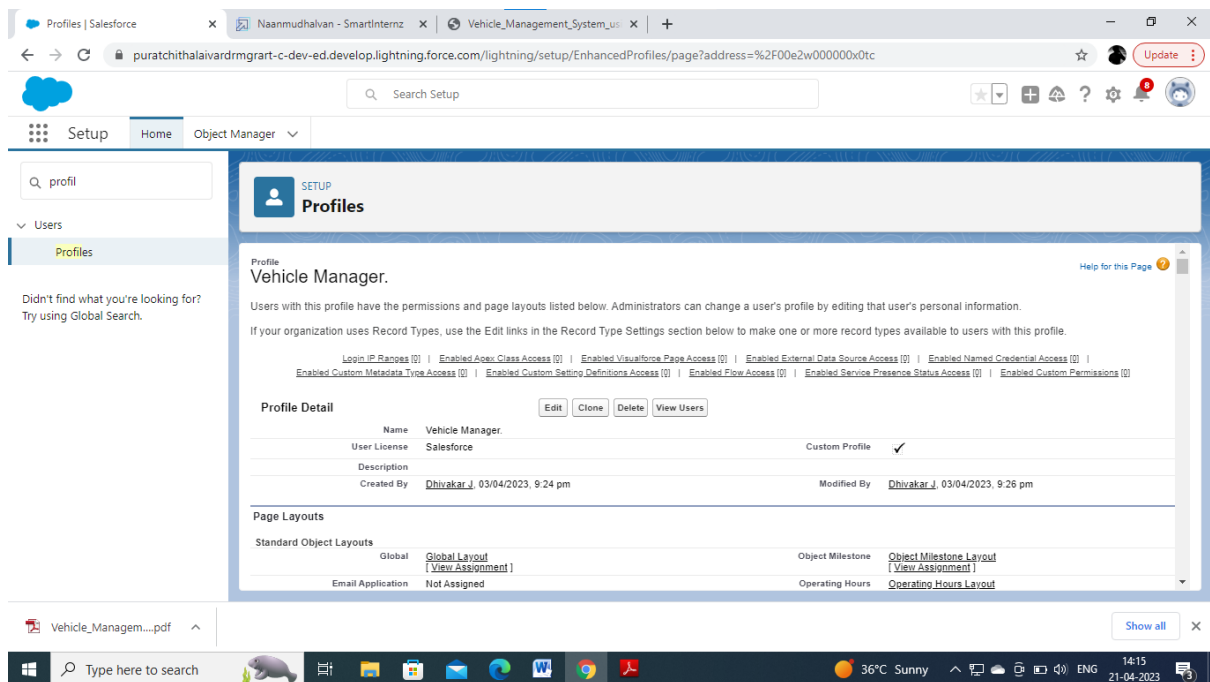
Creating a Profiles: Now create a Vehicle Manager profile and set its object permissions.

Creating a Profiles:



This screenshot shows the Salesforce Setup interface for the 'Profiles' section. The left sidebar contains a search bar and a list of items including 'Users' and 'Profiles'. The main content area displays a table of existing profiles. The table has columns for 'Action', 'Profile Name', 'User License', and 'Custom'. The profiles listed include 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Authenticated Website', 'Chatter External User', 'Chatter Free User', 'Chatter Moderator User', and 'Contract Manager'. At the bottom of the table, it indicates '1-25 of 40' profiles and '0 Selected'.

Action	Profile Name	User License	Custom
Edit Clone	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit Clone	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit Clone	Authenticated Website	Authenticated Website	<input type="checkbox"/>
Edit Clone	Chatter External User	Chatter External	<input type="checkbox"/>
Edit Clone	Chatter Free User	Chatter Free	<input type="checkbox"/>
Edit Clone	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
Edit Clone	Contract Manager	Salesforce	<input type="checkbox"/>



This screenshot shows the 'Profile: Vehicle Manager' page in Salesforce Setup. The page provides details about the profile, including its name, user license, and description. It also lists the page layouts assigned to this profile. The 'Profile Detail' section shows the profile name as 'Vehicle Manager', the user license as 'Salesforce', and the custom profile status as checked. The 'Page Layouts' section shows the standard object layouts, including 'Global', 'Object Milestone', and 'Operating Hours'.

Profile: Vehicle Manager.

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges](#) | [Enabled Apex Class Access](#) | [Enabled Visualforce Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Setting Definitions Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

Profile Detail [Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	Vehicle Manager.
User License	Salesforce
Description	
Created By	Dhivakar J. 03/04/2023, 9:24 pm
Modified By	Dhivakar J. 03/04/2023, 9:26 pm

Page Layouts

Standard Object Layouts	Global	Object Milestone	Operating Hours
	Global Layout View Assignment	Object Milestone Layout View Assignment	Operating Hours Layout
Email Application	Not Assigned		

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

Enter a Profile Name

Click on the new created profile

While still on the profile page, then click Edit.

Scroll down to Custom Object Permissions and Give view all access permissions and assign

to the parent profile

Similarly Create operator profile ,Clone Salesforce Platform user and give access only for

Vehicles object.

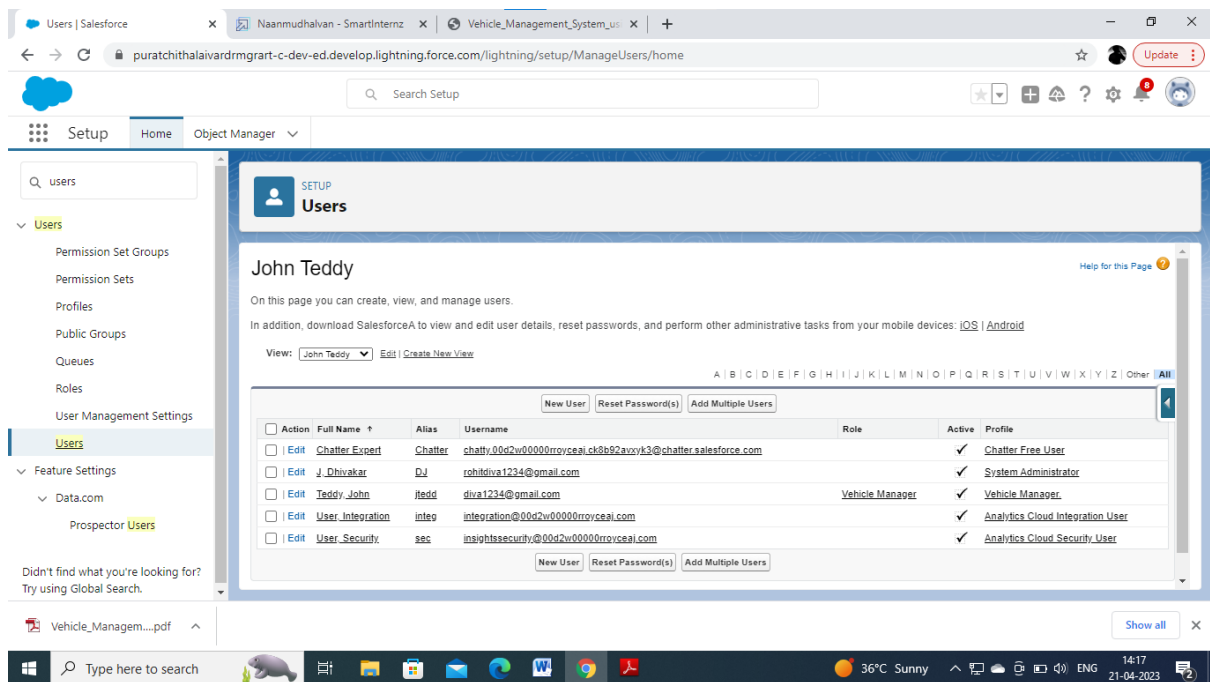
Setup Roles:

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 8:

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.

Fill in the fields (first name, last name, alias, email id, username, nick name, role, user

license, profiles) → save.

Similarly Create other 2 users and assign operator 1 and operator 2 roles along with operator

profile .

Activity 9:

Reports And Dashboards.

The screenshot shows a Salesforce 'New Vehicles Report' for 'Report: Vehicles'. The summary table displays the following data:

Customer Name	Chassis No	2WHEELERS	4WHEELERS	Subtotal	Subtotal	Total
SURYA	2003	Sum of Customer Mobile No Record Count	0	0	9,89,89,76,543	9,89,89,76,543
Subtotal		Sum of Customer Mobile No Record Count	0	0	9,89,89,76,543	9,89,89,76,543

The details table shows the following data:

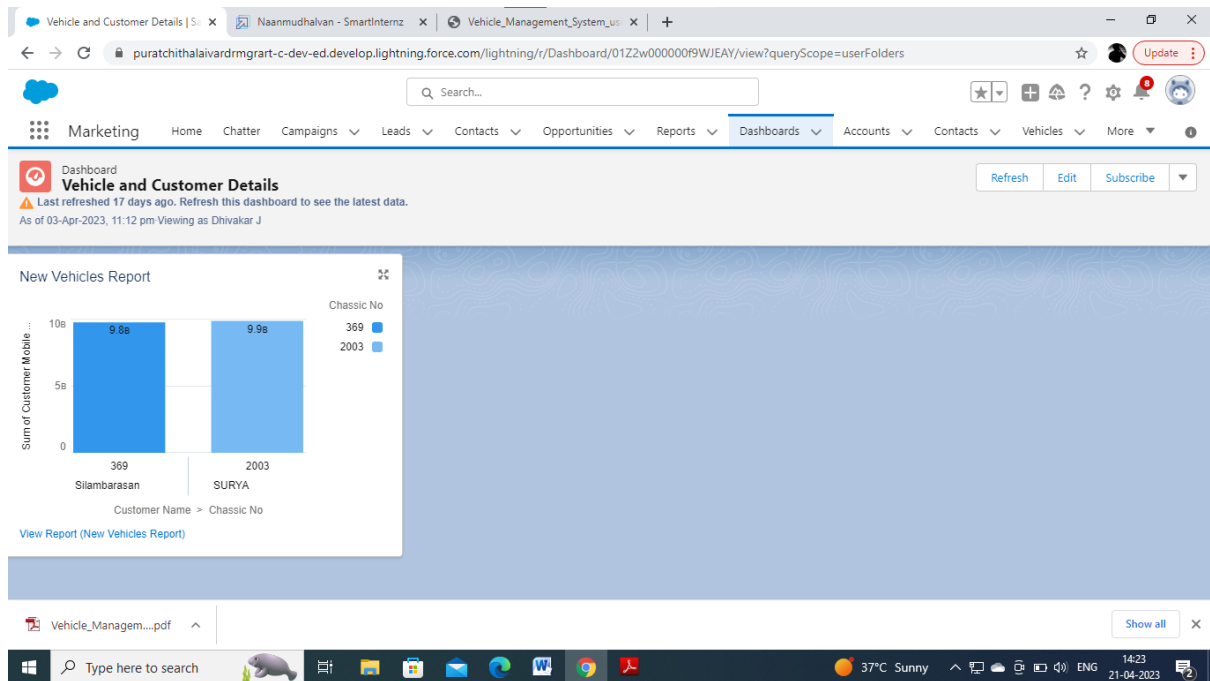
Vehicle: Vehicles Name	Vehicle: ID	Customer Mobile No
ROYAL ENFIELD	a002w00000bed3Z	9,89,89,76,543
HONDA	a002w00000bed3Y	9,78,71,79,273
		19,68,61,55,816

The report includes filters for 'Vehicle: Vehicles Name', 'Vehicle: ID', and 'Customer Mobile No'. The 'Details' section shows 2 rows. The 'Row Counts' section is set to 'Detail Rows'.

- 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 10:

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

Click New Report

Select report type from category or from report type panel or from search panel → click on

start report.

Customize your report, then save or run it.

3 Trailhead Profile Public URL

Team Lead(M.Silambarasan) -

<https://trailblazer.me/id/ssimbu4>

Team Member(J.Dhivakar) 1 -<https://trailblazer.me/id/rdiva17>

Team Member (M.Deena)2 -<https://trailblazer.me/id/ddeena2>

Team Member(R.Sethupathi) 3-

<https://trailblazer.me/id/hvicky4>

Project Report Template

4 ADVANTAGES & DISADVANTAGE

ADVANTAGES

Vehicle management systems can provide real-time monitoring and alerts for driver behavior, such as speeding or harsh braking, which helps promote safer driving and reduces the risk of accidents.

Enhanced maintenance: Vehicle management systems can track vehicle maintenance schedules and provide reminders for routine maintenance tasks, which helps reduce breakdowns and prolong vehicle lifespan.

Improved customer service: With real-time tracking and communication, vehicle management systems can provide accurate information on vehicle location and estimated arrival times, which improves customer service and satisfaction.

Cost savings: Effective vehicle management can help reduce fuel consumption, optimize routes, and improve maintenance scheduling, which can result in significant cost savings for the organization.

DISADVANTAGE

Cost: Implementing a vehicle management system can be expensive, especially for small businesses or organizations with limited budgets.

Complexity: Vehicle management systems can be complex and require a significant investment of time and resources to set up and maintain.

Dependence on technology: Vehicle management systems rely on technology such as GPS and telematics, which can be vulnerable to system failures or hacking.

Privacy concerns: Vehicle management systems collect data on driver behavior and vehicle location, which can raise privacy concerns for employees and customers.

Resistance to change: Implementing a vehicle management system may require changes to existing processes and may face resistance from employees who are used to the old ways of doing things.

5 APPLICATIONS

Vehicle tracking: Vehicle management applications use GPS technology to track the location of vehicles in real-time, which helps organizations monitor the movement of their fleet and plan routes effectively.

Maintenance management: Vehicle management applications can track vehicle maintenance schedules, including oil changes, tire rotations, and other routine maintenance tasks, and provide reminders for upcoming maintenance.

Fuel management: Vehicle management applications can monitor fuel consumption and provide insights on how to optimize fuel efficiency, which helps reduce fuel costs.

Driver management: Vehicle management applications can track driver behavior, including speeding, harsh braking, and other risky behaviors, and provide alerts to

fleet managers. This helps improve driver safety and reduce accidents.

7 CONCLUSION

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.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

8 FUTURE SCOPE

Autonomous Vehicles: The development of self-driving vehicles is one of the most significant trends in the automotive industry. Autonomous vehicles can improve vehicle management by reducing the need for human intervention, enhancing safety, and optimizing fuel efficiency.

Electric Vehicles: The push towards sustainable transportation is driving the growth of electric vehicles. EVs have lower emissions and lower operating costs, making them an attractive option for fleet managers and consumers alike. As battery technology continues to improve, EVs are expected to become even more practical and affordable.

Predictive Maintenance: With the help of Internet of Things (IoT) devices and machine learning algorithms, vehicle management systems can predict and prevent maintenance issues before they become major problems. This will help fleet managers optimize their maintenance schedules, reduce downtime, and improve overall vehicle performance.

Connected Vehicles: The integration of vehicles with the Internet of Things (IoT) and other connected technologies will enable vehicle management systems to gather real-time data on vehicle performance, driver behavior, and traffic conditions. This data can be used to optimize routes, reduce congestion, and improve safety.