

**GOVERNMENT ARTS COLLEGE FOR WOMEN  
SALEM-8**

Team ID: NM2023TMID15722

Team Lead – Radha.V

NM ID: 3A40E72EA72C26E9D914F932671AD850

Team Member 1-Nandhini.M

NM ID:4BC546F7BEB33AAA5DE466B6F6184BEC

Team Member 2- Pavithra.P

NM ID:853F82AB60773CE963040800427DEAAA

Team Member 3-Pavithra.M

NM ID:205C7E534A5EC57B100417C5CAEFA4B3

# VEHICLE MANAGEMENT

## USING SALESFORSE



### 1. INTRODUCTION :

#### Overview:

Salesforce is the customer company. We make cloud-based software designed to help businesses connect to their customers in a whole new way, so they can find more prospects, close more deals, and wow customers with amazing service. 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 offers are provided during the seasons and any updates regarding vehicles are sent to them in the form of messages and mails.

#### Purpose:

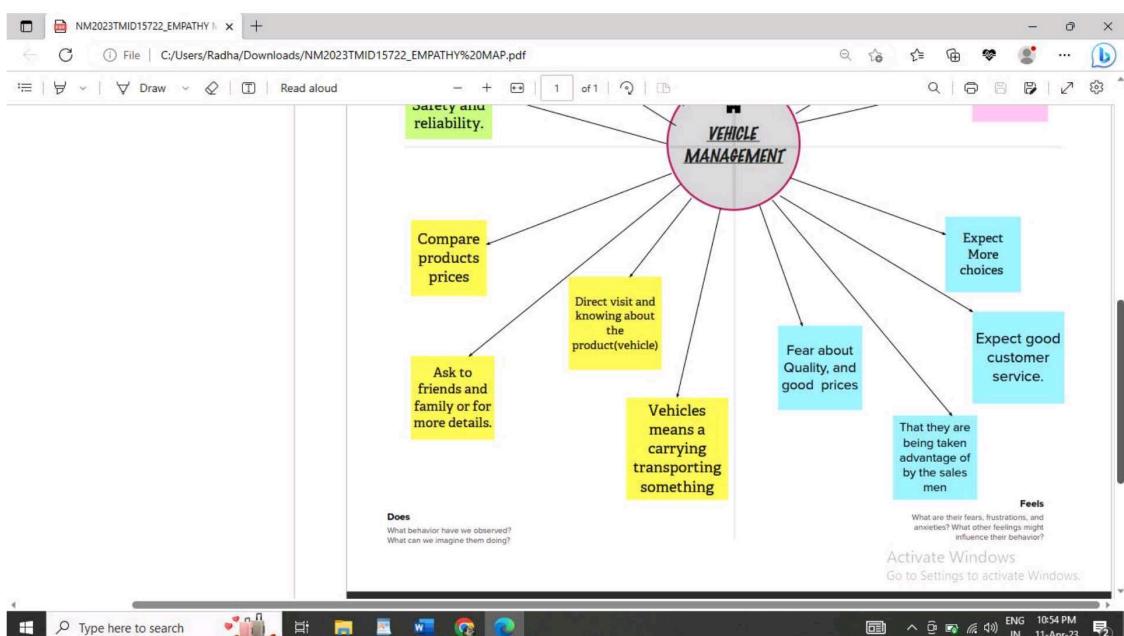
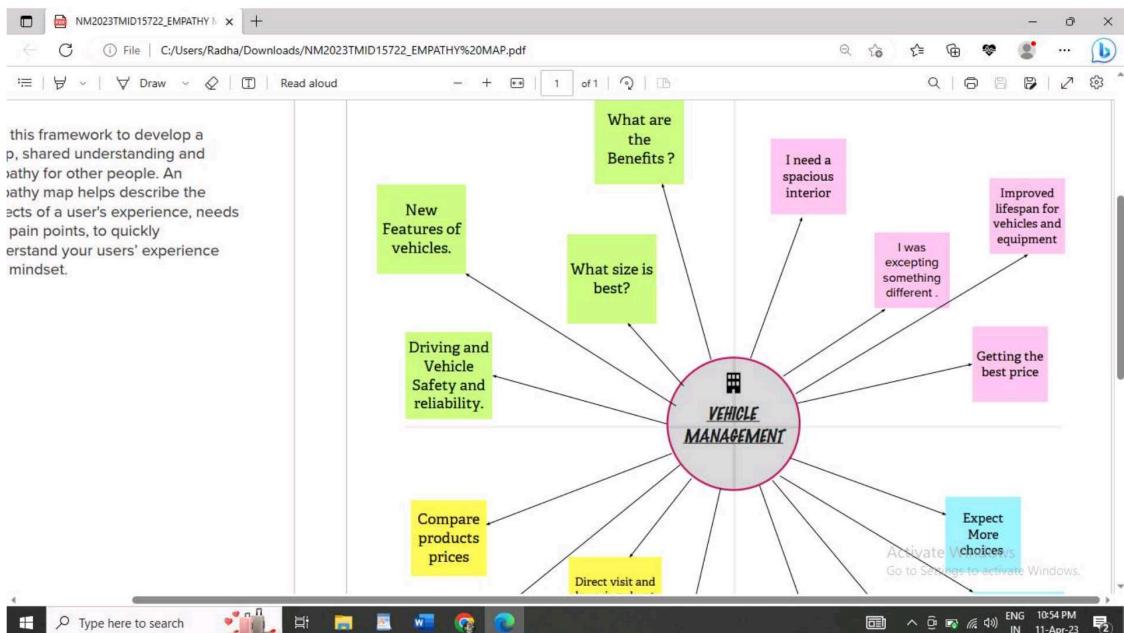
Organizations improve their vehicle operations, reduce costs, and increase efficiency by providing a comprehensive solution for managing their vehicles within Salesforce platform.

#### Objective:

- The objective of a vehicle management system is to provide a comprehensive and efficient platform for managing various aspects of a vehicles.
- This includes managing the vehicles themselves, as well as the drivers and any associated administrative tasks.
- This system store the customers data.

## 2.PROBLEM DEFINITION & DESIGN THINKING:

### (a) Empathy Map



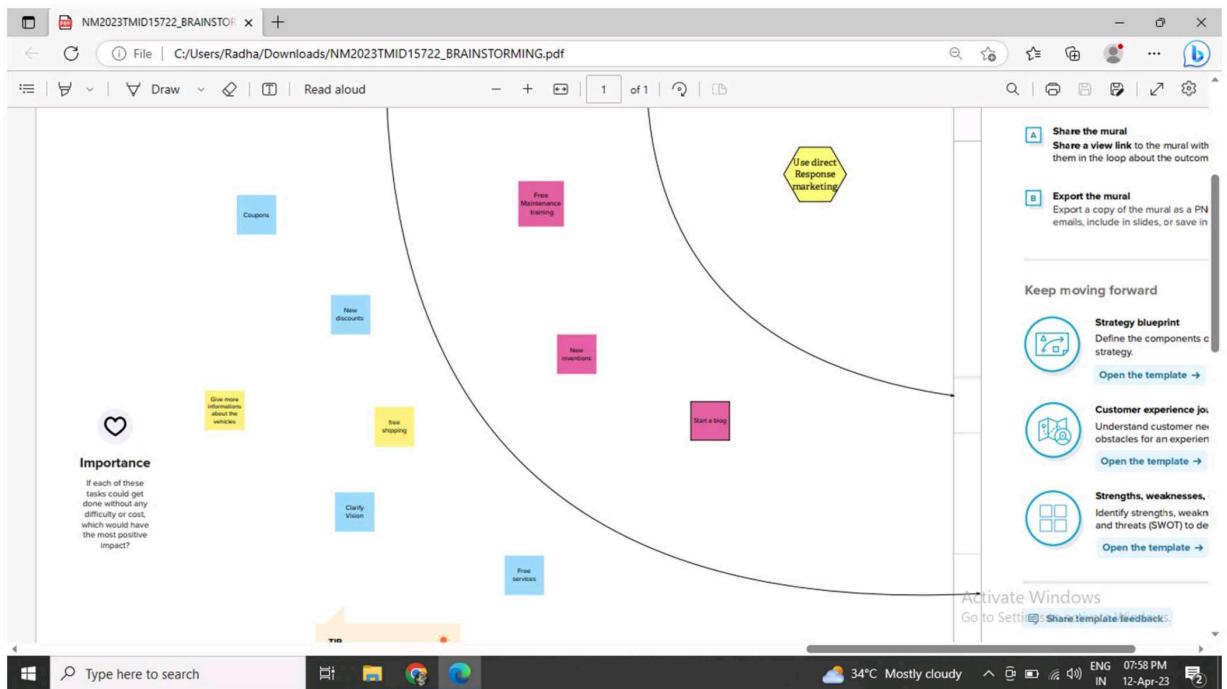
## (b) Ideation & Brainstorming Map

**PROBLEM**  
**How might we attract the customers?**

**Key rules of brainstorming**

- To run a smooth and productive session
- Stay in topic.
- Defer judgment.
- Go for volume.
- Encourage wild ideas.
- Listen to others.
- If possible, be visual.

**TIP**  
Add customizable tags to sticky notes to make it easier to find, browse, organize, and categorize important ideas as themes within your mural.



- **3. RESULTS:**

- **Activity I**

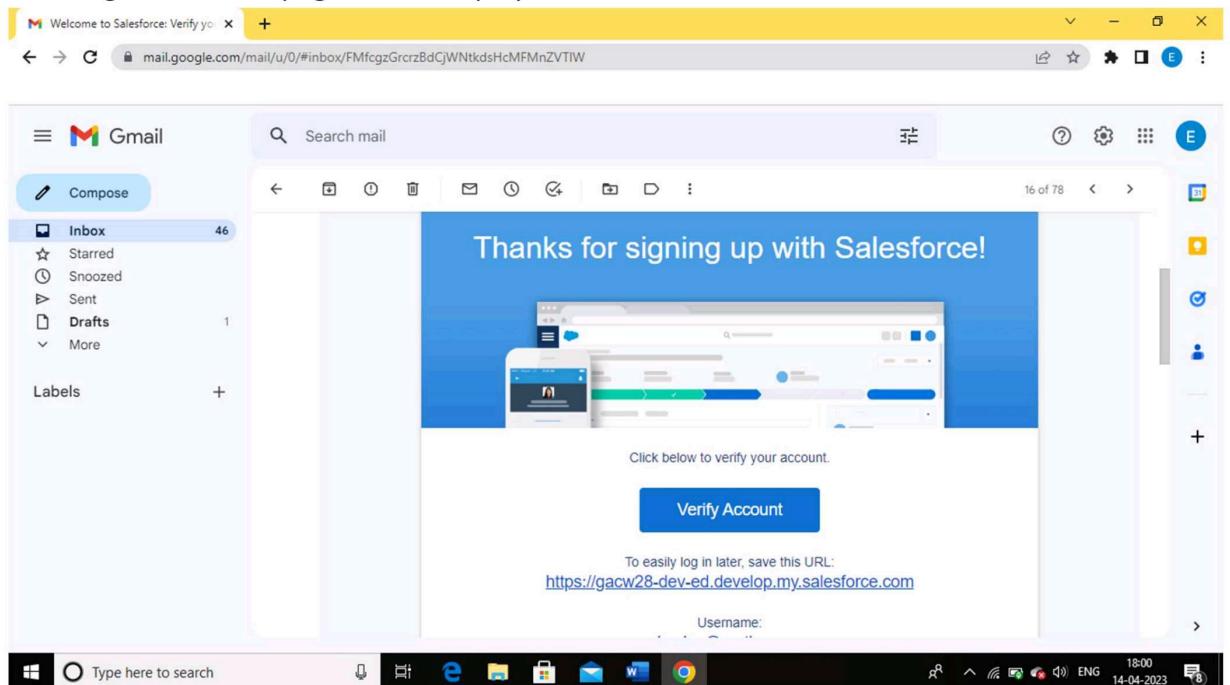
## **CREATING DEVELOPER ACCOUNT**

Go to [developers.salesforce.com/](https://developers.salesforce.com/)

Click sign up

Enter the Details: First name & Last name, Email, Role: Developer , Company : GACW, Country: India , Postal Code: pin code, username : as like [username@organization.com](mailto:username@organization.com)sign up. You receive the mail for account activation. Go to Salesforce and click login Enter username and password

After login this home page will be display.



- Activity II **OBJECT CREATION**

**Description:**

Salesforce objects are database tables that permit you to store data that is specific to an organization. There are two types of objects Standard objects and Custom objects.

Setup → Object manager → Create → Custom Object → Label: Vehicle → Record Name: Vehicle Name → Click allow Reports and allow search → save

Similarly create the Driver object.

- Activity III **FIELDS CREATION**

**Description:**

An object relationship in salesforce is a two-way association between two objects. Relationships are created by creating custom relationship fields on an object. This is done so that when users view records, they can also see and access related data.

Fields in Vehicles and Driver objects follow below data types:

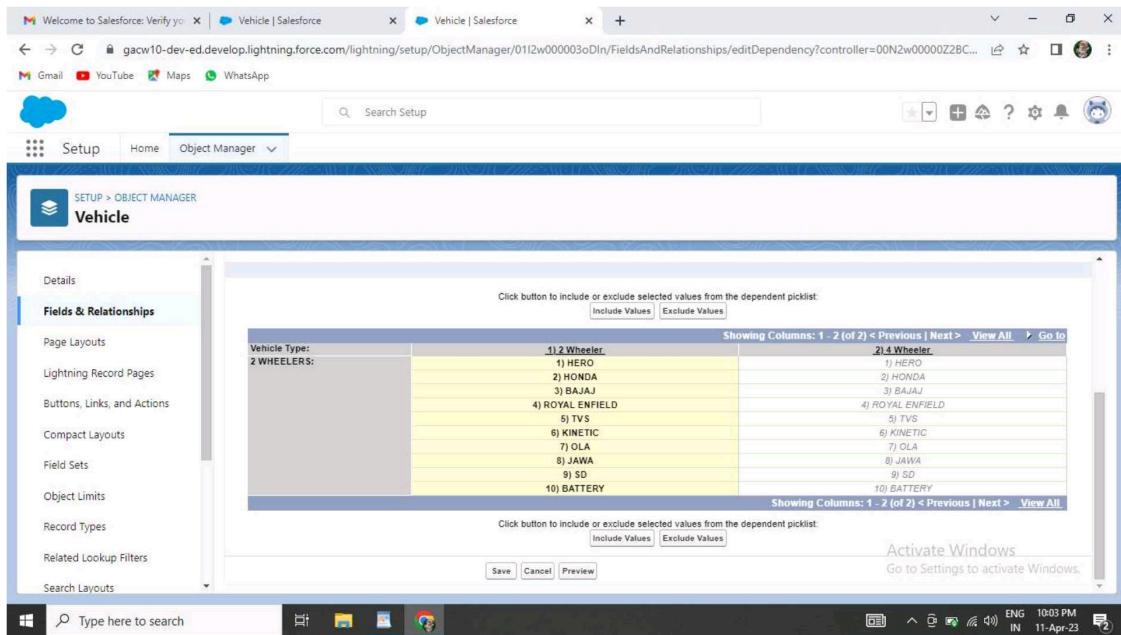
| OBJECT NAME     | FIELDS IN THE OBJECT  |   |
|-----------------|---|---|
|                 | Field label   | Data types  |
|                 |   |   |
| <i>Vehicles</i> | <p>1.Customer Name</p> <p>2.Customer Mobile No</p> <p>3.Vehicle Type</p> <ul style="list-style-type: none"> <li>i) 2 WHEELER</li> <li>ii) 4 WHEELER</li> </ul> <p>4. 2WHEELERS</p> <ul style="list-style-type: none"> <li>i) HERO</li> <li>ii) HONDA</li> <li>iii) BAJAJ</li> <li>iv) ROYAL ENFIELD</li> <li>v) TVS</li> <li>vi) KINETIC</li> <li>vii) OLA</li> <li>viii) JAWA</li> <li>ix) SD</li> <li>x) BATTERY</li> </ul> <p>5. 4WHEELERS</p> <ul style="list-style-type: none"> <li>i) RENAULT</li> <li>ii) SKODA</li> </ul> | <p>Text</p> <p>Number</p> <p>Picklist</p> <p>Picklist</p> |

|  |  |                |
|--|--|----------------|
|  | iii) HONDA<br>iv) HYUNDAI<br>v) SUZUKI<br>vi) MAHINDRA<br>vi) VOLKSWAGEN<br>vii) BENZ<br>viii) AUDI<br>ix) VOLVO |                |
|  | 6. Vehicle Name  | Text           |
|  | 7. Vehicle No  | Text           |
|  | 8. Chassis No  | Text           |
|  | 9. Colour  | Text           |
|  | 10. Body Type  | Text           |
|  | 11. Vehicles Includes  | Multi picklist |
|  | 12. Condition  | Picklist       |
|  | 13. Mileage  | Text           |
|  | 14. Seats  | Number         |

|        | 15. Start Date   | Date/Time             |
|--------|------------------|-----------------------|
|        | 16. End Date     | Date/Time             |
|        | 17. Opportunity  | Lookup(opportunities) |
|        | Field label      | Data type             |
| Driver | 1.Driver Name    | Text                  |
|        | 2. License No    | Text                  |
|        | 3. Mobile No     | Number                |
|        | 4. Fair per Hour | Text                  |
|        | 5. Vehicle       | Lookup (Vehicle)      |

Vehicle Type:

| 2 WHEELERS:      | 4 WHEELER:       |
|------------------|------------------|
| 1) HERO          | 1) HERO          |
| 2) HONDA         | 2) HONDA         |
| 3) BAJAJ         | 3) BAJAJ         |
| 4) ROYAL ENFIELD | 4) ROYAL ENFIELD |
| 5) TVS           | 5) TVS           |
| 6) KINETIC       | 6) KINETIC       |
| 7) OLA           | 7) OLA           |
| 8) JAWA          | 8) JAWA          |
| 9) SD            | 9) SD            |
| 10) BATTERY      | 10) BATTERY      |



- Activity IV

## APP CREATION

### Description:

App 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.

Setup → App Manager → New lightning App → App Name: Vehicle Management → Next → Select Accounts, Contacts, Opportunities, Vehicle, Driver, Reports, Dashboards And move to Selected items → Available Profile Select System Administrator Move it to selected item → Click Save & Finish.

The screenshot shows the Salesforce Setup Home page. On the left, there's a sidebar with a search bar and sections for Data, Apps, Lightning Bolt, and Mobile Apps. The main area features three cards: "Get Started with Einstein Bots", "Mobile Publisher", and "Real-time Collaborative Docs". Below these is a section titled "Most Recently Used" with a link to "Activate Windows". The bottom status bar shows system information like battery level, signal strength, and date/time.

The screenshot shows the Salesforce Accounts page under the "Vehicle management" tab. The top navigation bar includes links for Accounts, Contacts, Opportunities, Vehicles, Drivers, Reports, and Dashboards. The main content area displays a table with columns for Account Name, Account Site, Phone, and Account Owner Alias. A message at the bottom states, "You haven't viewed any Accounts recently. Try switching list views." The bottom status bar shows system information like battery level, signal strength, and date/time.

- Activity V

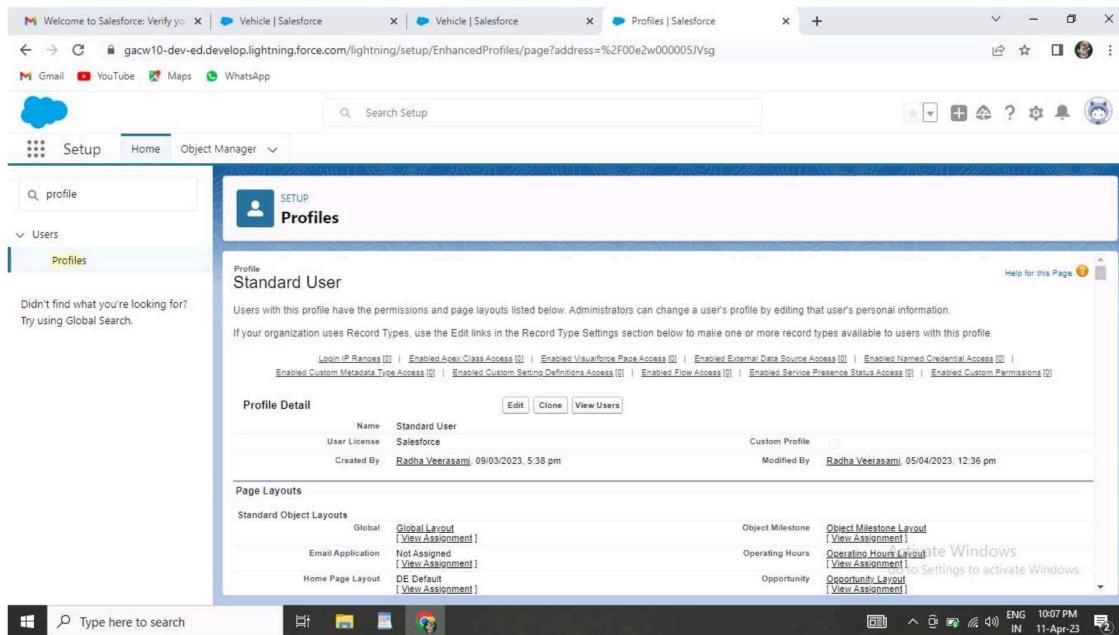
## PROFILE CREATION

### Description:

A profile is a group 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.

Setup → Find PROFILES → Select STANDARD USER → Clone → Profile Name as VEHICLE MANAGER → Save.

Similarly create the profiles OPERATOR 1 & OPERATOR 2.



## ROLE CREATION

Setup → Roles → Setup Roles → Expand All → Under CEO Click add role → Label as Vehicle Manager → Save

Similarly Create two other roles under Vehicle Manager as Operator 1,2.

**Understanding Roles**

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role Hierarchy  
View other sample Role Hierarchies: [Territory-based Sample](#)

```

graph TD
    CEO[CEO] --> President[President]
    President --> CFO[CFO]
    President --> VP_Sales[VP Sales]
    CFO --> Director_Western[Director Western Sales]
    Director_Western --> SalesRep_Western[Sales Rep CA Sales Rep OR Sales Rep]
    Director_Eastern[Director Eastern Sales] --> SalesRep_Eastern[Sales Rep NY Sales Rep MA Sales Rep]
    Director_International[Director International Sales] --> SalesRep_International[Sales Rep Asian Sales Rep European Sales Rep]
  
```

**Executive Staff**

- CEO
- President
- CFO
- VP, Sales

**Western Sales Director**

- Western Sales Rep
- CA Sales Rep
- OR Sales Rep

**Eastern Sales Director**

- Eastern Sales Rep
- NY Sales Rep
- MA Sales Rep

**International Sales Director**

- International Sales Rep
- Asian Sales Rep
- European Sales Rep

\* View & edit data, roll up forecasts, generate reports for all users below  
\* Can't access data of other Executive Staff

\* View & edit data, roll up forecasts, generate reports for all users directly below  
\* Can't access data of users above or at same level

\* View & edit data, roll up forecasts, & generate reports for own team  
\* Can't access data of users above or at same level

Activate Windows  
Go to Settings to activate Windows.

**roles**

VP\_Marketing

- Add Role
- Marketing Team

  - Add Role

VP\_North American Sales

- Add Role
- Director\_Channel Sales

  - Add Role
  - Channel Sales Team

    - Add Role

Director\_Direct Sales

  - Add Role
  - Eastern Sales Team

    - Add Role

  - Western Sales Team

    - Add Role

Vehicle Manager

  - Add Role
  - Operator\_1

    - Add Role

  - Operator\_2

    - Add Role

Activate Windows  
Go to Settings to activate Windows.

## ✓ Activity VI

## USERS CREATION

### Description:

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. Setup → Find USERS → ROLE (VEHICLE MANAGER), User Licences (SALESFORCE), Profile (VEHICLE MANAGER) → Save. Create similarly other two users.

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

- Users List View:** The top window displays a list of users. One user, "Radha Veerasamy", is selected. The list includes columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The "Role" column shows "Vehicle Manager" for the selected user.
- User Edit View:** The bottom window shows the "User Edit" screen for "Radha Veerasamy". The "General Information" section contains fields for First Name (Radha), Last Name (Veerasamy), Alias (rveer), Email (radhaveerasami@gmail.com), Username (radhaveerasami@gmail.com), Nickname (User1680013940057838747), Title, Company, Department, and Division. The "Role" field is set to "Vehicle Manager", "User License" to "Salesforce", and "Profile" to "Vehicle Manager". The "Active" checkbox is checked.

## ✓ Activity VII REPORT

### Description:

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. Reports → New Reports → Select Vehicle, contact, accounts report type → Start report → Add columns and Rows → Save.

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

- Header:** Welcome to Salesforce: Verify, Vehicle | Salesforce, Roles | Salesforce, New Accounts Report.
- Search Bar:** Search...
- Top Navigation:** Vehicle management, Accounts, Contacts, Opportunities, Vehicles, Drivers, Reports, Dashboards.
- Report Title:** Report: Accounts New Accounts Report.
- Table Headers:** Account Name, Last Activity, Account Owner, Billing State/Province, Type, Rating, Last Modified Date.
- Data Rows:**
  - Burlington Textiles Corp of America (1) - Radha Veerasami, NC, Customer - Direct, Warm, 09/03/2023
  - Dickenson plc (1) - Radha Veerasami, KS, Customer - Channel, -, 09/03/2023
  - Edge Communications (1) - Radha Veerasami, TX, Customer - Direct, Hot, 09/03/2023
  - Express Logistics and Transport (1) - Radha Veerasami, OR, Customer - Channel, Cold, 09/03/2023
  - GenePoint (1) - Radha Veerasami, CA, Customer - Channel, Cold, 09/03/2023
  - Grand Hotels & Resorts Ltd (1) - Radha Veerasami, IL, Customer - Direct, Warm, 09/03/2023
- Buttons:** Enable Field Editing, Edit.
- Footer:** Row Counts, Detail Rows, Subtotals, Grand Total.
- System Status:** Activate Windows, Go to Settings to activate Windows.
- Taskbar:** Type here to search, Start button, Task View, File Explorer, Edge, Google Chrome, System tray showing ENG IN 10:11 PM 11-Apr-23.

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

- Header:** Welcome to Salesforce: Verify, Vehicle | Salesforce, Roles | Salesforce, Vehicles and customer details.
- Search Bar:** Search...
- Top Navigation:** Vehicle management, Accounts, Contacts, Opportunities, Vehicles, Drivers, Reports, Dashboards.
- Report Title:** Report: Vehicles Vehicles and customer details.
- Table Headers:** Vehicle ID, Customer Mobile Number, Chassis No, Vehicle: Vehicle Name, Customer Name, Colour, Condition, 4 WHEELERS, 2 WHEELERS.
- Data Rows:**
  - a002w00000Bzspw (1) - 044-9876543234 (1) - 45o8734UH543234 (1) - HSD Bike - vidhu - red - 1) Good - -
  - a002w00000BztAX (1) - 044-7894567845 (1) - 23456087654W53G (1) - GCEbike - Ram - white - 1) Good - - 1) HERO
  - a002w00000BztDq (1) - 044-9876544567 (1) - 74ER64567IT (1) - ICC car - kalai - black - 1) Good - 4) HYUNDAI -
- Buttons:** Enable Field Editing, Edit.
- Footer:** Row Counts, Detail Rows, Subtotals, Grand Total.
- System Status:** Activate Windows, Go to Settings to activate Windows.
- Taskbar:** Type here to search, Start button, Task View, File Explorer, Edge, Google Chrome, System tray showing ENG IN 10:11 PM 11-Apr-23.

**New Contacts & Accounts Report**

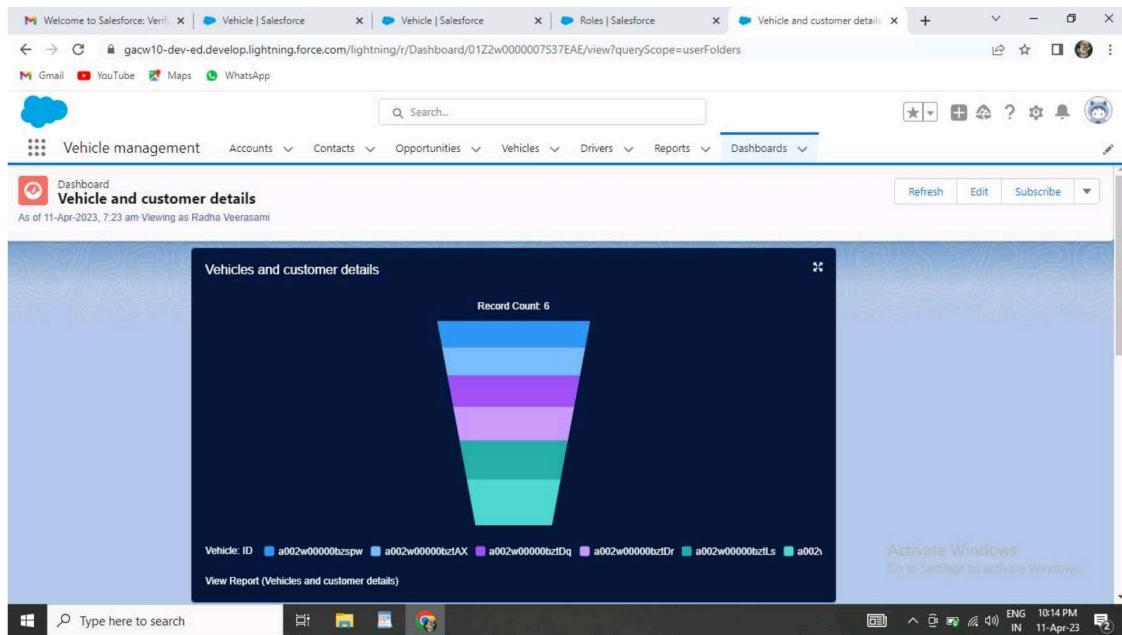
| Contact ID          | Salutation | First Name | Last Name | Title                           | Account Name                        | Mailing Street                                    |
|---------------------|------------|------------|-----------|---------------------------------|-------------------------------------|---|
| 0032w000011ZREj (1) | Ms.        | Rose       | Gonzalez  | SVP, Procurement                | Edge Communications                 | 313 Constitution Place<br>Austin, TX 78767<br>USA |
| 0032w000011ZREk (1) | Mr.        | Sean       | Forbes    | CFO                             | Edge Communications                 | 312 Constitution Place<br>Austin, TX 78767<br>USA |
| 0032w000011ZREl (1) | Mr.        | Jack       | Rogers    | VP, Facilities                  | Burlington Textiles Corp of America | 525 S. Lexington Ave                              |
| 0032w000011ZREm (1) | Ms.        | Pat        | Stumuller | SVP, Administration and Finance | Pyramid Construction Inc.           | 2 Place Jussieu                                   |
| 0032w000011ZREN (1) | Mr         | Andy       | Young     | SVP, Operations                 | Dickenson plc                       | 1301 Hoch Drive                                   |

## ✓ Activity VII DASHBOARDS

### Description:

The Reports that you have Finished. The save reports in dashboards displays like charts easy to understand.

Dashboards → New Dashboards → Dashboard name as VEHICLE AND CUSTOMER DETAILS → +Component → Add Chart → Click save and Done.



## 4 .TRAILHEAD PROFILE PUBLIC URL :

Team Lead - <https://trailblazer.me/id/rveerasamy1>

Team Member 1 - <https://trailblazer.me/id/nandm36>

Team Member 2 - <https://trailblazer.me/id/spavi40>

Team Member 3 - <https://trailblazer.me/id/pavim1805>

## 5. ADVANTAGES & DISADVANTAGES:

### ***ADVANTAGES :***

- Duplication of the vehicle data is avoided.
- Vehicle status, readily available.
- Improved lifespan for vehicles and equipment.
- Vehicle captures all the information related to vehicle number, vehicle ID.
- Includes all informations about Vehicle.

### ***DISADVANTAGES :***

- Implementing and maintaining a vehicle management system using salesforce can be EXPENSIVE.
- Salesforce is a complex platform, and configuring a vehicle management system within salesforce can be challenging for companies without the necessary technical expertise.
- While Salesforce provides many features and functionalities, it may not have all the necessary features for a specific vehicle management system.

### **6.APPLICATIONS:**

- The Vehicle Management system is easy to view their customer details.
- Overall, Vehicle Management applications can be applied in any industry or setting where vehicles are used, and can provide significant benefits in terms of efficiency, productivity, and cost savings.

### **7.CONCLUSION:**

- ❖ The Vehicle Management is used to Store the Customers Details and Communicate with customers easily.
- ❖ And convey the innovations and discounts of current level using mails.
- ❖ Completely the customer data is stored for long life

### **8.FUTURE SCOPE:**

Looking to the future, the scope of vehicle management systems using Salesforce is promising, with exciting possibilities for innovation and optimization in vehicle management. Predictive maintenance, autonomous vehicles, some of the trends and possibilities for vehicle management.