MAILAM Engineering College

ANNA UNIVERSITY PROGRESS THROUGH KNOWLEDGE

SALES AUTOMOBILE USING SALESFORCE CRM

A PROJECT REPORT

Submitted by

ARUNKUMAR A (Reg.No:421622205012)

DINESH K (Reg.No:421622205026)

GANISHKAR K (Reg.No:421622205033)

DEVENDRAN S (Reg.No:421622205020)

DEENADHAYALAN S (Reg.No:421622205017)

Of

BACHELOR OF TECHNOLOGY

in

INFORMATION TECHNOLOGY

MAILAM ENGINEERING COLLEGE, MAILAM

ANNA UNIVERSITY : CHENNAI 60025

MAILAM Engineering College
MAILAM (PO), Villupuram (Dt). Pin: 604 304
(Approved by AICTE, New Delhi, affiliated to Anna University Chennai, accredited by NAAC with "A" Grade & A TATA Consultancy Services Accredited Institution)

Register No: ______________________________

Name : ______________________________

Branch : ______________________________

Semester : ______________________________

Certificate

Certified that this is the bonafide record of the practical work done by the above student in the ______________________________ during the academic year ____________________.

SIGNATURE **SIGNATURE**

Ms.R.ASWINI, M.E.,
SUPERVISOR
Assistant Professor,
Information Technology,

Dr.S.KALAIVANY, M.E., PhD
HEAD OF DEPARTMENT
Professor,
Information Technology,

Submitted for the University Practical Examination held on………………

INTERNAL EXAMINER **EXTERNAL EXAMINAR**

PROJECT DESCRIPTION

The Salesforce CRM implementation for automobile sales streamlines the entire sales process, enhancing efficiency and customer satisfaction. Through this system, sales teams can manage leads, track customer interactions, and automate follow-ups. It enables comprehensive customer profiling, allowing for personalized marketing strategies and targeted campaigns. The platform facilitates inventory management, ensuring real-time updates on available vehicles and their specifications. Integration with marketing tools enables seamless communication and lead nurturing. Additionally, the system provides insightful analytics, empowering decision-making by identifying sales trends and forecasting demand. Overall, the Salesforce CRM for automobile sales optimizes operations, fosters customer relationships, and drives revenue growth within the automotive industry.

PROJECT ABSTRACT

The project, "Salesforce Automobile," leverages Salesforce CRM to enhance customer relationship management and operational efficiency within the automobile industry. The solution focuses on streamlining sales processes, automating customer service, and improving marketing strategies. Key functionalities include managing customer interactions, tracking vehicle inventory, automating lead generation, and providing real-time analytics to drive data-driven decisions. The integration of Salesforce tools such as Sales Cloud, Service Cloud, and Marketing Cloud ensures a seamless customer journey, from inquiry to post-sale support. This project demonstrates the potential of Salesforce CRM to transform traditional automobile business operations into a more agile and customer-centric model, ultimately boosting customer satisfaction and business performance.

The goal of this project is to implement Salesforce CRM to optimize the sales, marketing, customer service, and after-sales support processes in the automobile industry. By adopting Salesforce's CRM solutions, automobile dealerships can streamline customer interactions, improve lead conversion, enhance marketing efforts, and provide better after-sales service, ultimately driving customer satisfaction and increasing sales.

TABLE OF CONTENTS

PROJECT DESCRIPTION……………………………………………………..1

PROJECT ABSTRACT ....……………..............................….........2

TABLE OF CONTENTS........…........….……………………………...........3

INTRODUCTION ....……………………............................5

TASK 1: CREATING DEVELOPER ACCOUNT 6

TASK 2: ACCOUNT ACTIVATION...7

TASK 3: CREATE OBJECTS FROM SPREADSHEET........………...........8

Subtask 3.1: Create Automobile Information Object 8

Subtask 3.2: Create Invoice Object...8

Subtask 3.3: Create Automobile Object...9

TASK 4: CREATE TABS………………………………………………..10

Subtask 4.1: Creating a Customer Tab..10

TASK 5: THE LIGHTNING APP………………………………………..11

Subtask 5.1: Create a Lightning app..12

TASK 6:CREATE FIELDS & RELATIONSHIPS……………………..……13

Subtask 6.1:Creating Opportunity Master Detail Relationship Field in Opportunity AutoMobile Object..13

Subtask6.2:Creating the AutoMobile Information Lookup Field in Opportunity Automobile Object……..13

Subtask 6.3:Creating Quantity Number Field in Opportunity Automobile Object…………………13

Subtask 6.4:Creating Formula Field in Opportunity Automobile Object……………………………14

Subtask 6.5:Creating the Formula field in Opportunity Automobile Object……………………...14

Subtask 6.6:Updating field in Invoice Object...15

Subtask 6.7:Creating Remaining Fields in Objects...15

TASK 7:CREATE PAGE LAYOUTS…………………..………………...16

Subtask 7.1:Edit the Page layout for Opportunity Object…………………………………………16

Subtask 7.2:Edit the Page layout for Automobiles Information…………………………………17

TASK 8:Create Apex Trigger……………………………………………..18

Subtask 8.1:Opportunity Automobile Quantity……………………………………………………………18
Subtask 8.2:Opportunity Automobile Error…………………………………………………………………18
Subtask 8.3:Incoice Creation Trigger……………………………………………………………………19
Subtask 8.4:Check Contact Role……………………………………………………………………………19
TASK 9:CREATE LWC COMPONENT…………………..…………………20
Subtask 9.1:Create Apex to Get Invoices……………………………………………………………………21
Subtask 9.2:Install Salesforce CLI…………………………………………………………………………..21
Subtask 9.3:Install Microsoft VS Code……………………………………………………………………..22
Subtask 9.4:Install the Salesforce Extension Pack…………………………………………………………22
Subtask 9.5:Create a project in VS code……………………………………………………………………23
Subtask 9.6:Authorize An Org……………………………………………………………………………..23
Subtask 9.7:Create Lightning Web Component…………………………….……………………………..24
Subtask 9.8:Create Buttton To add on Opportunity…………………………….……………………….24
Subtask 9.9:Add Invoice Opportunity into Opportunity Record Page…………..…………………….25
TASK 10:CREATE APEX SCHEDULER………………………………26
Subtask 10.1:Delete opportunity Schedule Class……………………………….……………………26
TASK 11:CREATE REPORT…………………………..……………..27
Subtask 11.1:Create Report on Opportunity……………………………………………….……………..27
Subtask 11.2:Create Report on Automobile Information…………………………………….…………..27
TASK 12:CREATE DASHBOARD……………………..………………28
Subtask 12.1:Sales dashboard………………………………………………………………….……………28
CONCLUSION ………………………………………………………30

INTRODUCTION

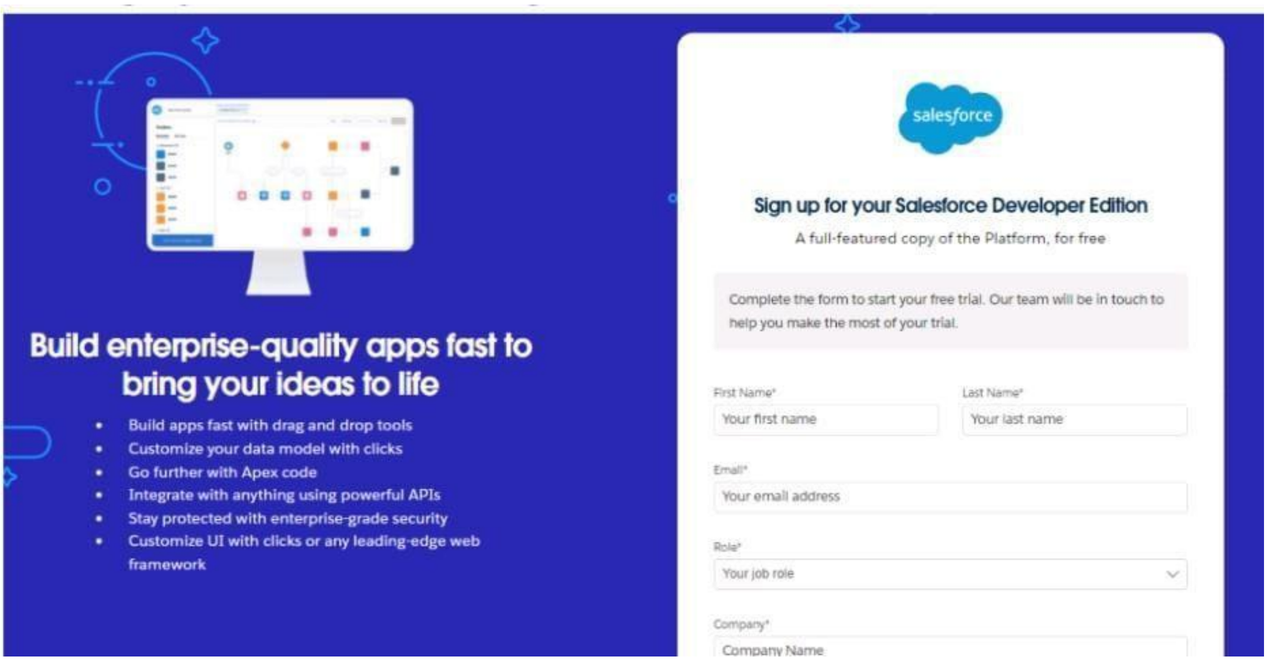
The Salesforce Automobile project leverages the powerful features of Salesforce CRM to streamline and enhance the operations of the automobile industry. Salesforce CRM is a robust platform widely recognized for its capabilities in managing customer relationships, automating workflows, and delivering actionable insights.

This project focuses on implementing Salesforce's features to address the unique challenges faced by automobile businesses, such as sales and service management, lead tracking, inventory control, and customer engagement. By utilizing tools like Sales Cloud, Service Cloud, and custom automations, the system ensures seamless integration of processes, improved customer satisfaction, and data-driven decision-making.

The project showcases how Salesforce's adaptable ecosystem can be tailored to meet the needs of the automobile sector, emphasizing efficiency, scalability, and innovation. Through this implementation, businesses can gain a competitive edge by delivering superior experiences to both customers and stakeholders.

TASK 1: CREATING DEVELOPER ACCOUNT

1. Go to https://developer.salesforce.com/signup
2. Fill up form with personal information



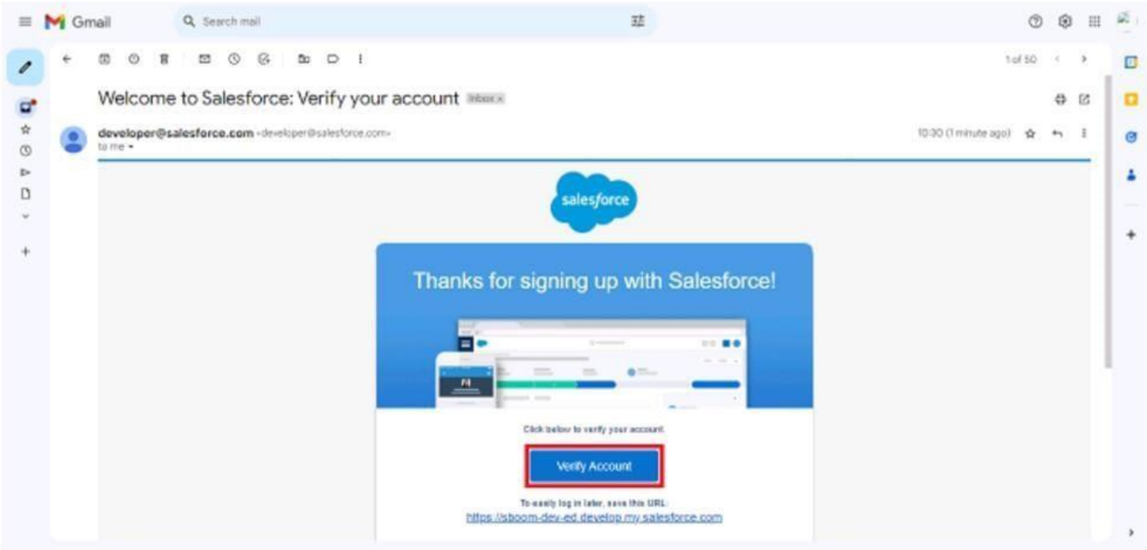
1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format : username@organization.com

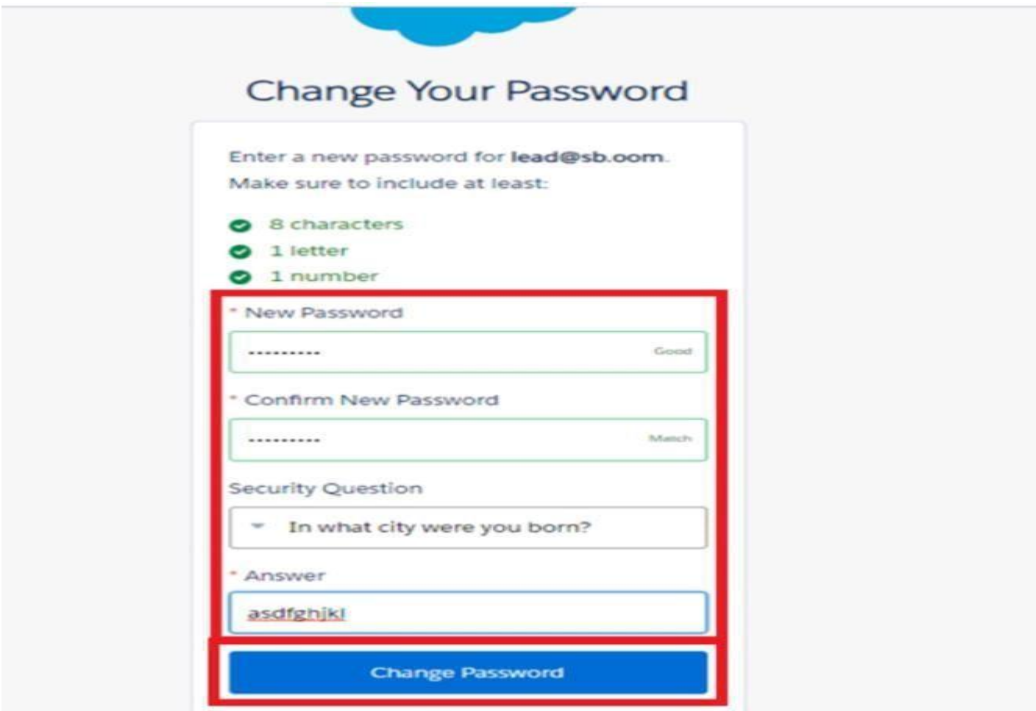
Click on sign me up after filling

TASK 2: ACCOUNT ACTIVATION

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account.
2. Give a password and answer a security question and click on change password.
3. Then you will redirect to your salesforce setup page.



1. Click on Verify Account
2. Give a password and answer a security question and click on change password.



TASK 3: CREATE OBJECTS FROM SPREADSHEET

Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects .

Salesforce objects are of two types:

- Standard Objects:

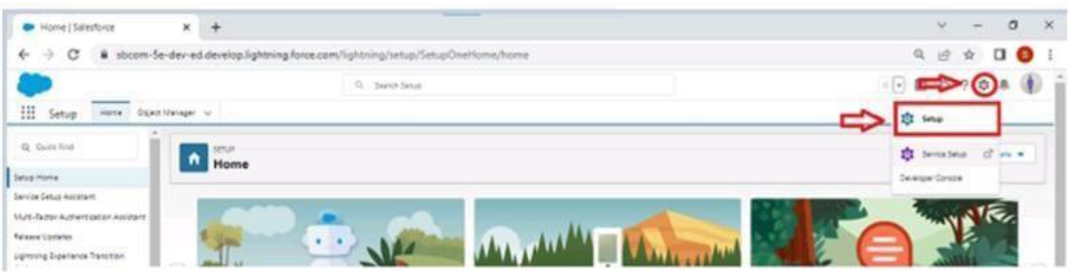
Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

- Custom Objects:

Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. It is a very useful objects used for the salesforce. They are the heart of any application and provide a structure for sharing data.

To Navigate to Setup Page:

Click on gear icon >> click setup



Create Automobile Object:

The purpose of creating an Automobile custom object is to store and manage information about Invoice.

To create an object:

i) From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object. ii) Enter the label name>> Opportunity Automobile iii) Plural label name>>Opportunity Automobiles

1. Enter Record Name Label and Format:

   i) Record Name >> Opportunity Automobile Id ii) Data Type >> Auto Number

   iii) Display Format >> OA-{0000} iv)

Starting Number >> 1

2. Click on Allow reports.

3. Allow search

4. Save.

TASK 4: CREATE TABS

A tab is like a user interface that is used to build records for objects and to view the records in the objects.

Types:

1.Custom Tabs
2.Web Tabs
3.Visualforce Tabs
4.Lightning Component Tabs
5.Lightning Page Tabs

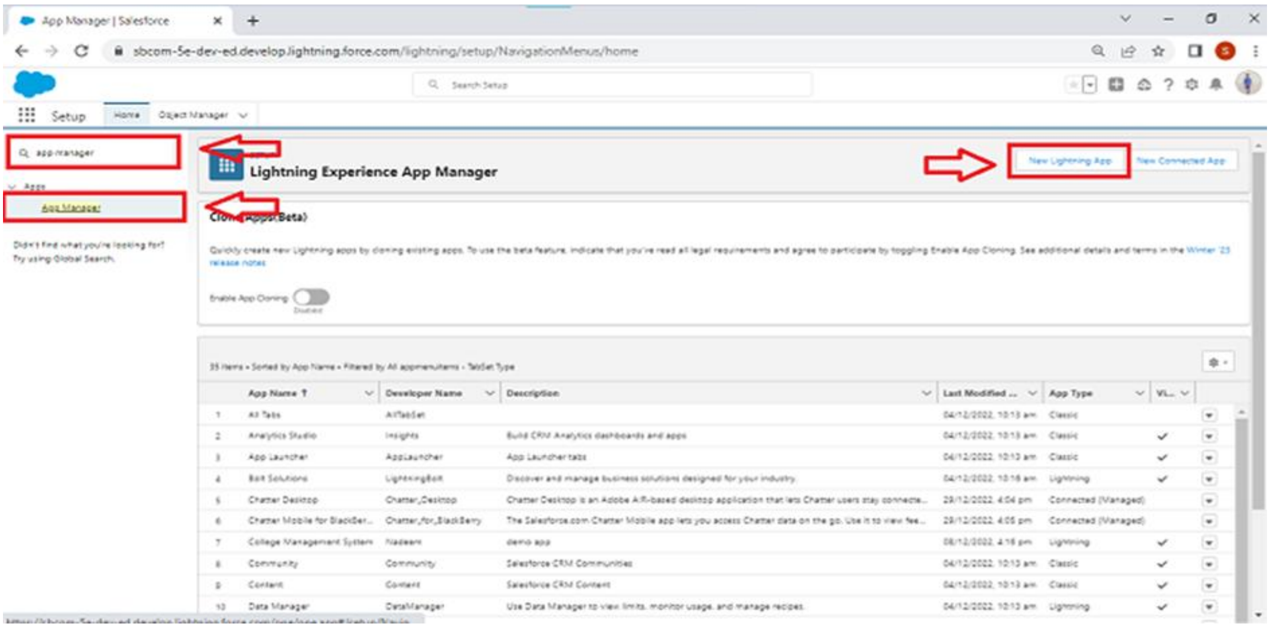
Create Custom Tabs:

1.Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)

2.Select Object(Opportunity Automobile) >> Select any tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) keep it as default >> Save.

TASK 5: THE LIGHTNING APP

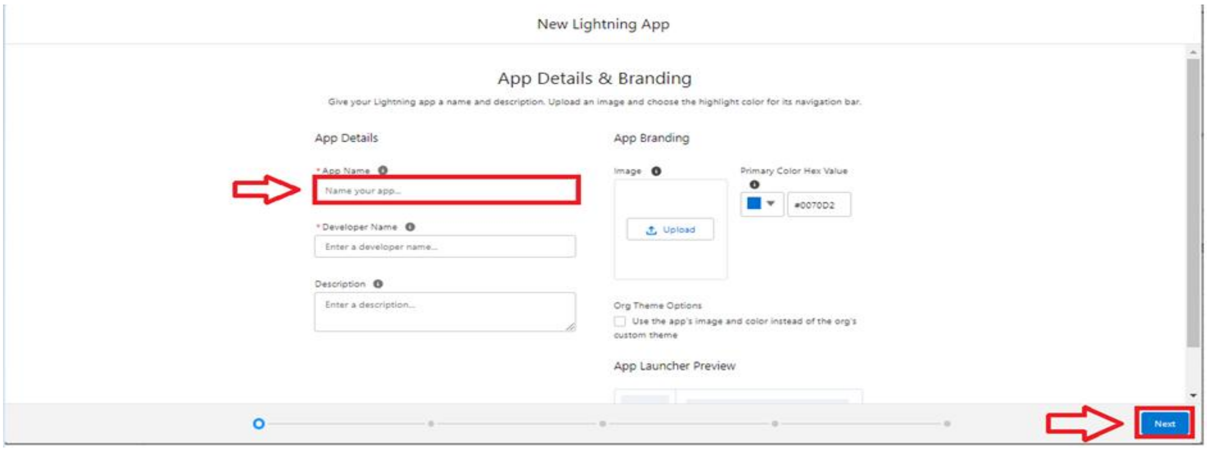
1.Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App.



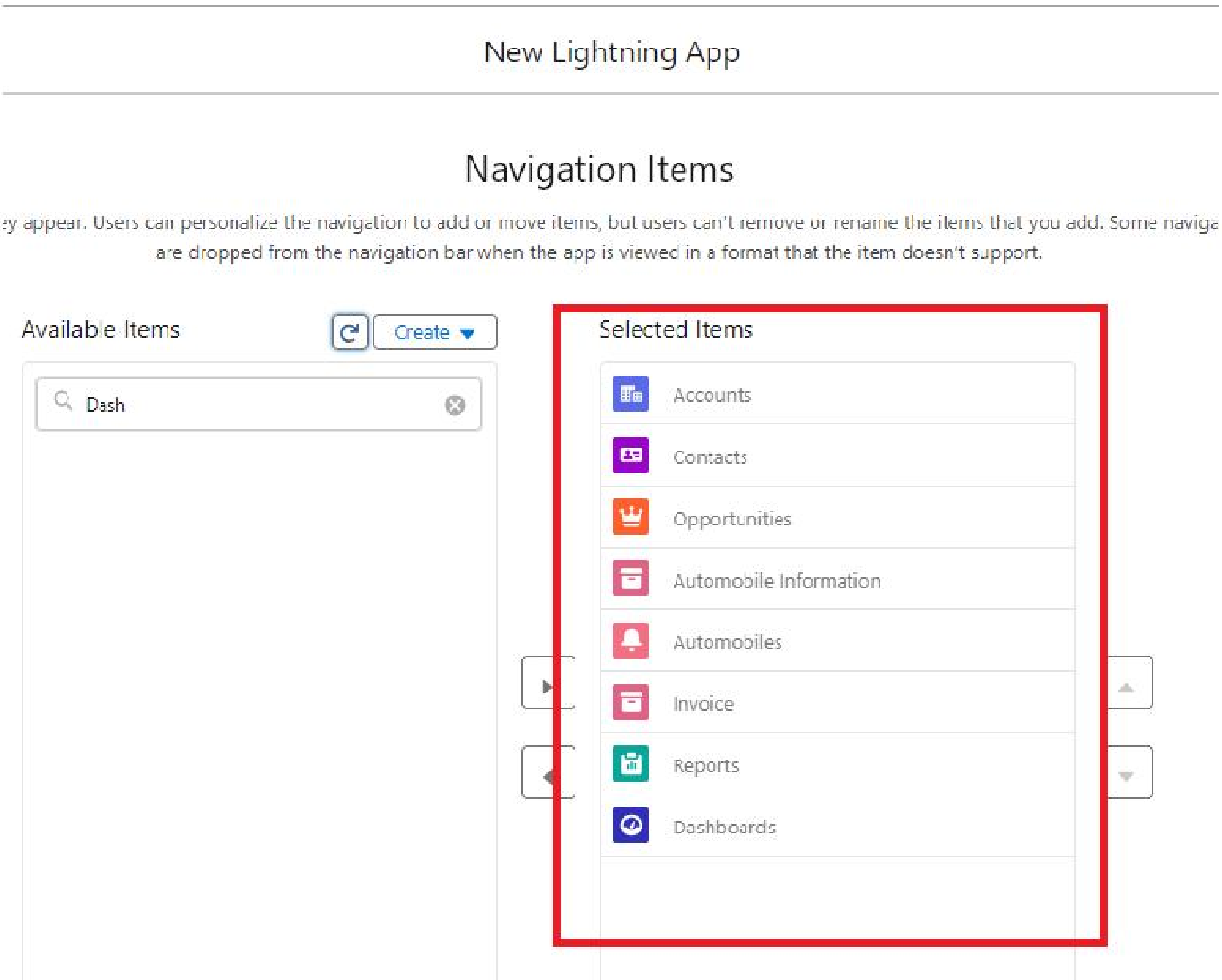
2.Fill the app name in app details and branding as follow

- App Name :Sales Automobile Using Salesforce CRM
- Developer Name : this will auto populated
- Description : Give a meaningful description
- Image : optional (if you want to give any image you can otherwise not mandatory)
- Primary color hex value : keep this default

3.Then click Next >> (App option page) keep it as default >> Next >> (Utility Items) keep it as default >> Next.



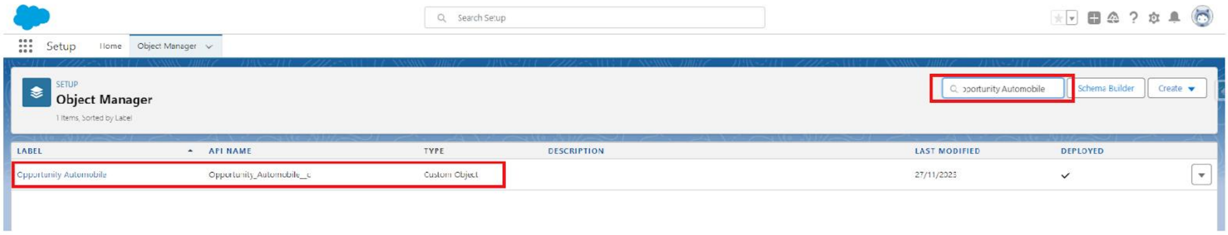
4.Add Navigation Items:



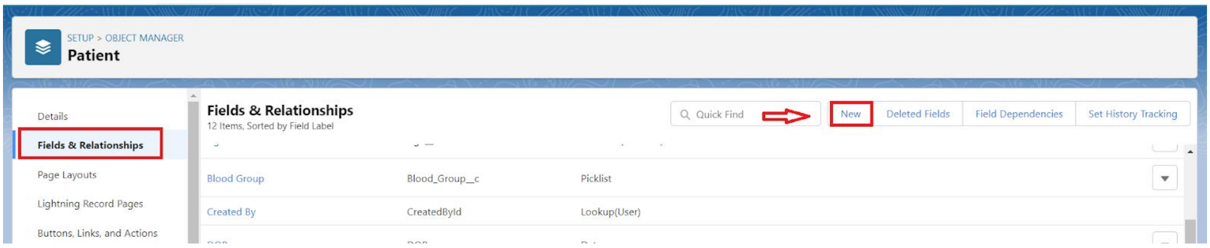
TASK 6: CREATE FIELDS & RELATIONSHIPS

To create fields in an object:

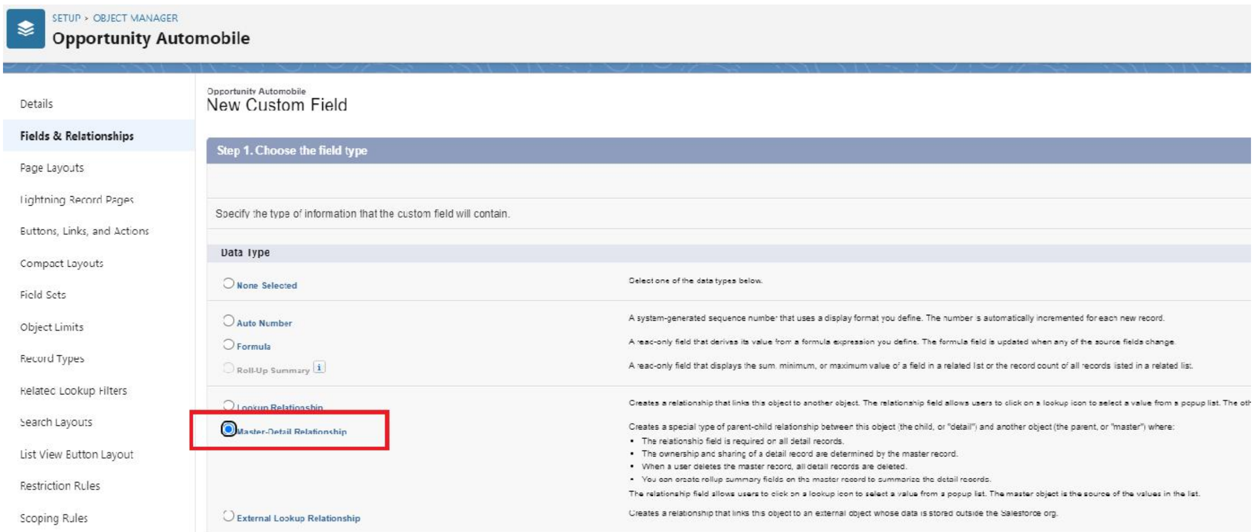
1. Go to setup >> click on Object Manager >> type object name(Opportunity Automobile) in



2. Now click on “Fields & Relationships” >> New

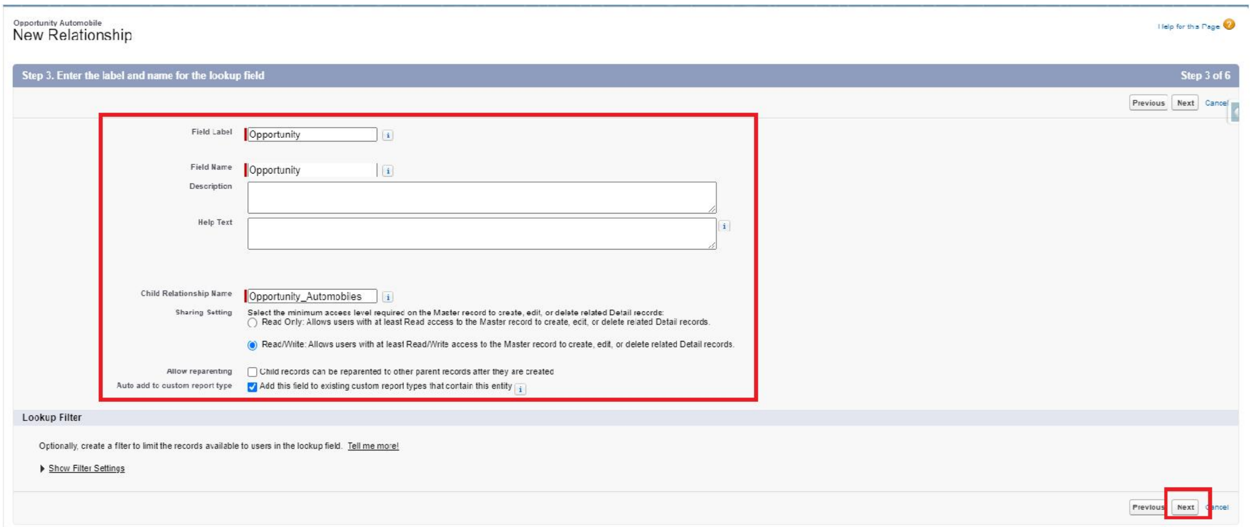


3. Now click on “Fields & Relationships” >> New

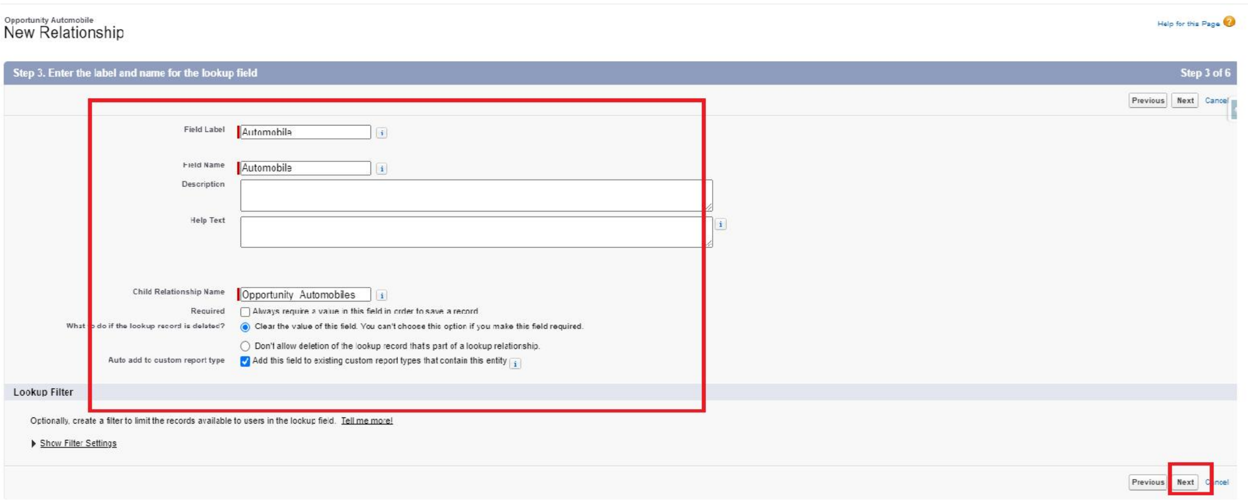


5.Fill the above as following:

- Field Label: gets auto Generated(Opportunity)
- Field Name : gets auto generated(Opportunity)
- Click on Next >> Next >> Save and new.



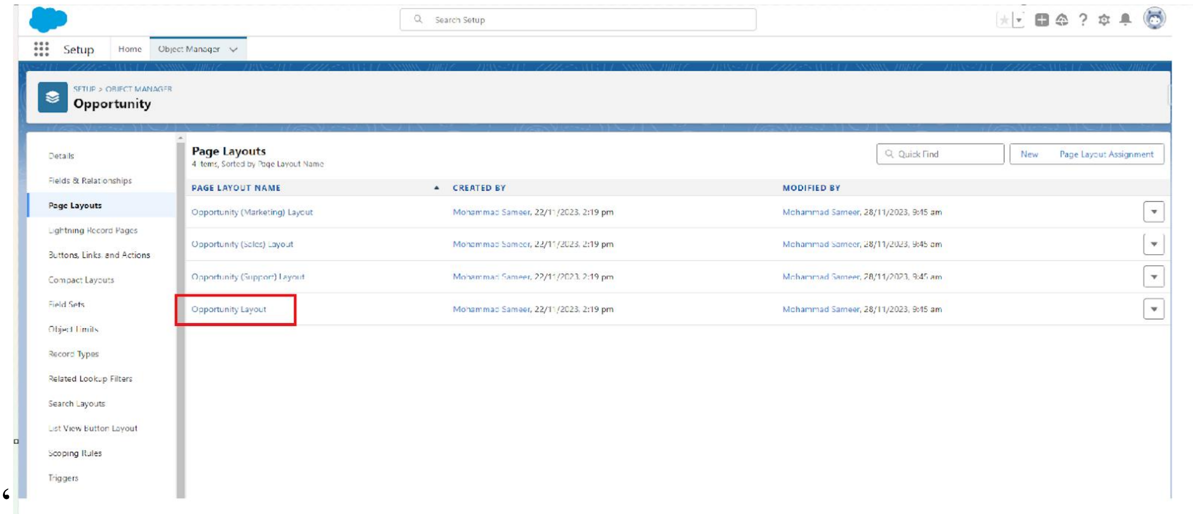
6.Click on Next >> Next>> Save and new.



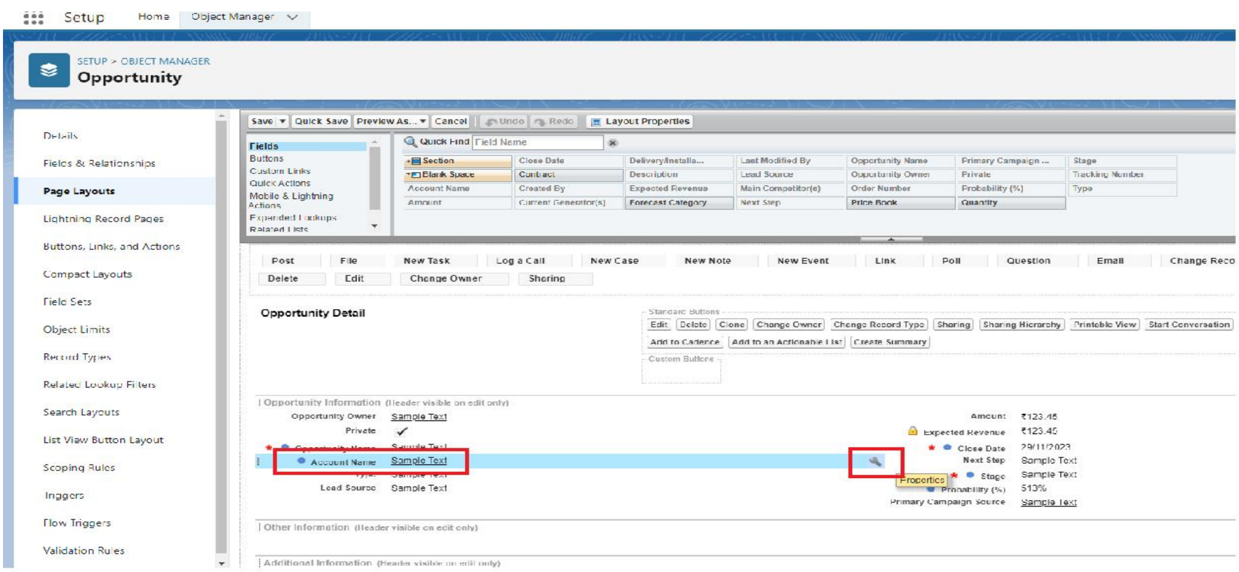
TASK 7:CREATE PAGE LAYOUTS

1. Go to Setup >> Click on Object Manager >> On the search bar, select Opportunity Layout. You can notice Page Layouts on the left panel

2. 2.Click on Page Layouts, Click on Opportunity Layouts'.



3.In the Opportunity Detail Section, you can see various fields. Go on Account And Click on that Properties icon of Account name Field.



4. check the Required box for Account name and click on Ok.

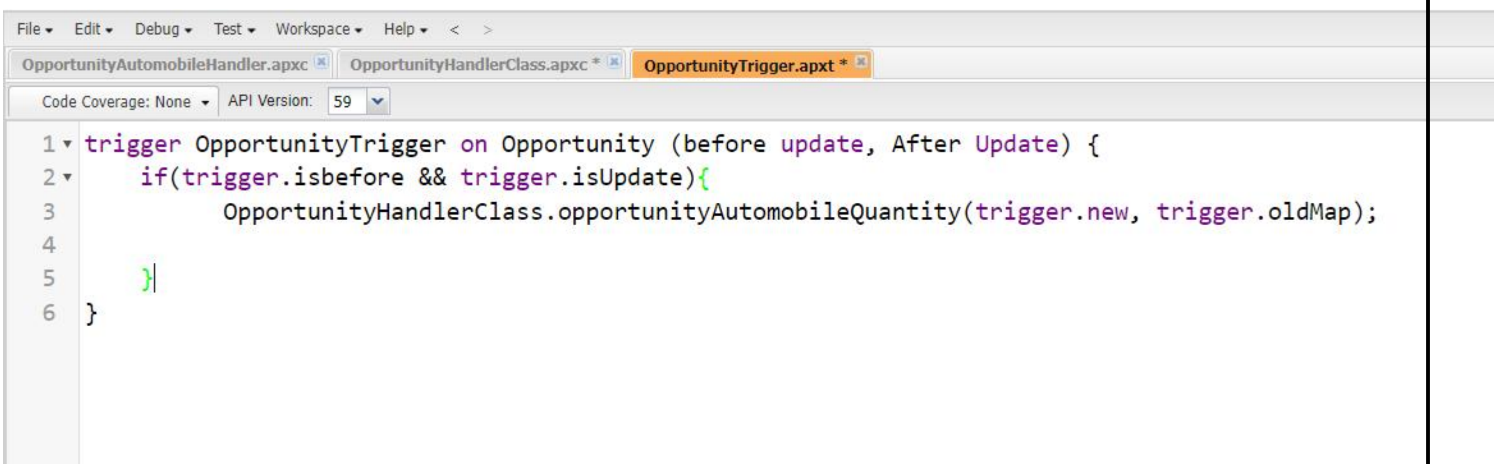
5.Click on Save.

TASK 8:CREATE APEX TRIGGER

Apex can be invoked by using triggers. Apex triggers enable you to perform custom actions before or after changes to Salesforce records, such as insertions, updates, or deletions. The five operations very useful operations that is listed below. These are very basic and simple operations that is used for the Apex Trigger. It is a very easy techniques A trigger is Apex code that executes before or after the following types of operations:

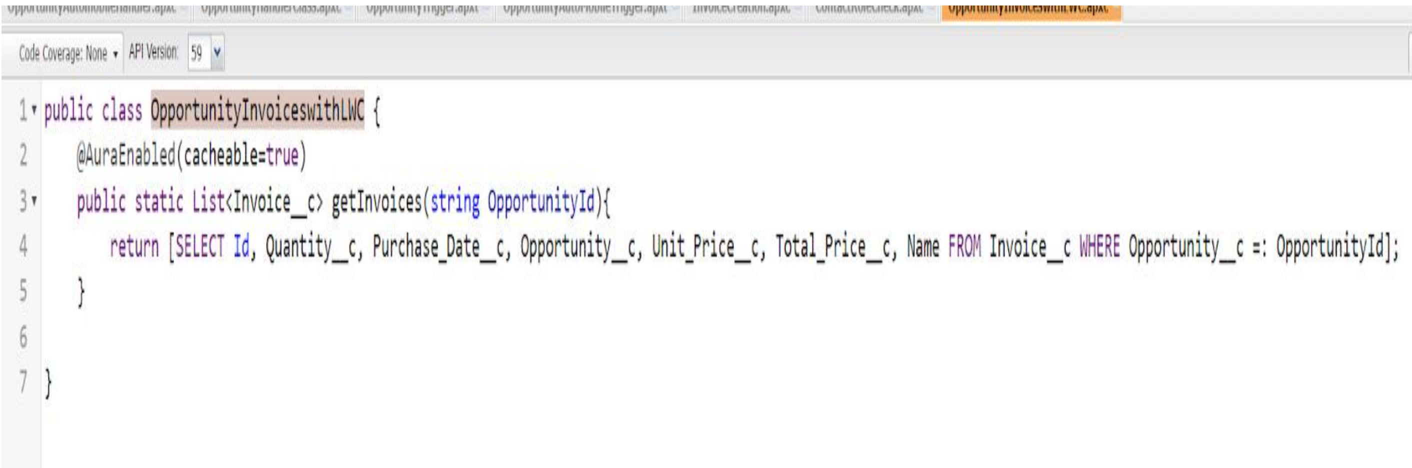
- insert
- update
- delete
- merge
- upsert
- undelete

In this project , trigger is called whenever the particular records sum exceed the threshold i.e minimum business requirement value. Then the code in the trigger will get executed.



TASK 9:CREATE LWC COMPONENT

- Login to the respective account and navigate to the gear icon in the top right corner.
- Click on the Developer console.
- Now you will see a new console window.
- In the toolbar, you can see FILE.
- Click on it and navigate to new and create New apex class.



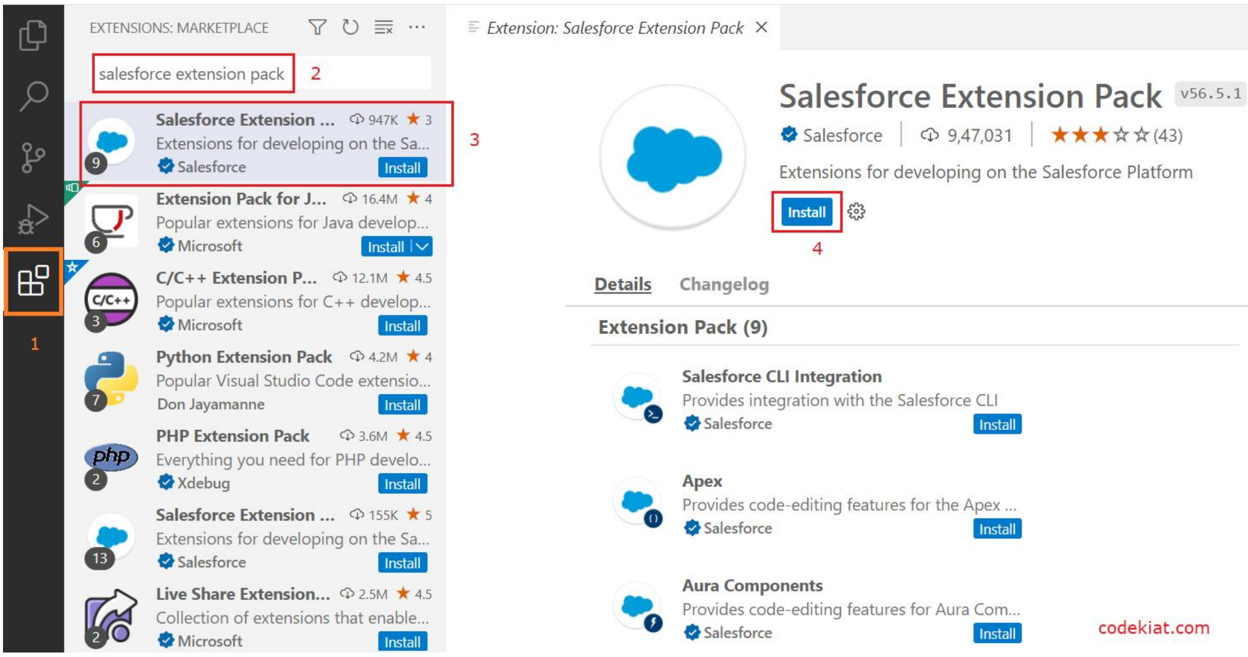
Install the Salesforce Extension Pack
In the VS Code,

1. go to extensions (1) as shown in the image below.

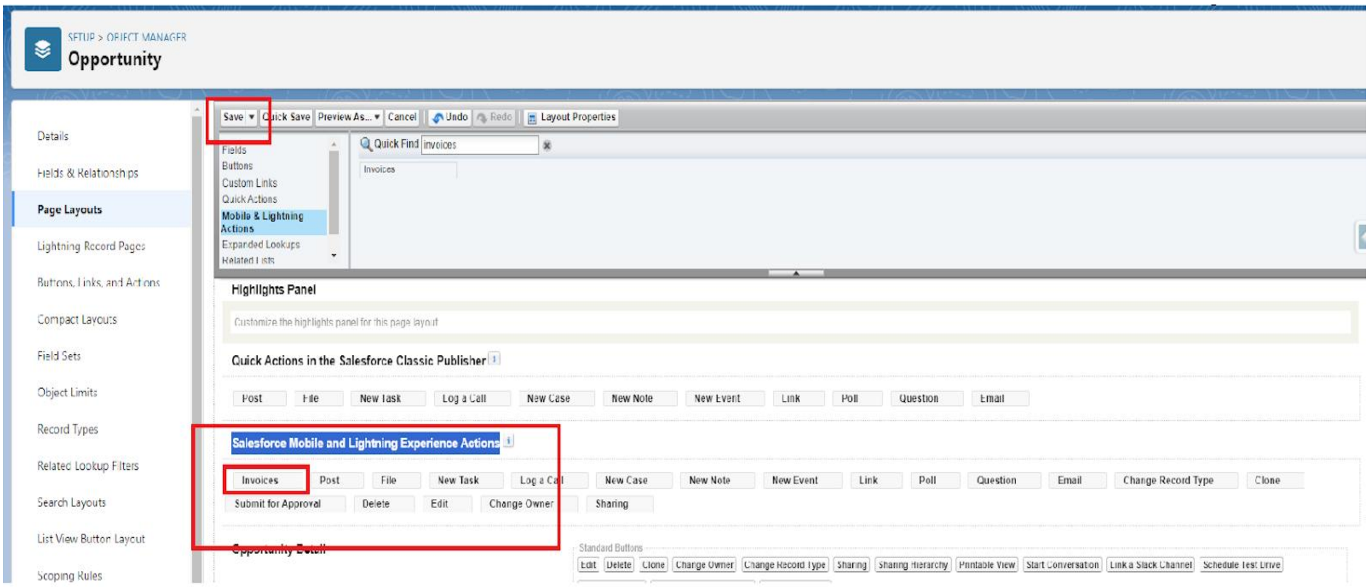
2. Search with the Salesforce extension pack (2) as shown in the image below.

3. select Salesforce Extension Pack from the list (3) as shown in the image below.

4. Click the Install button (4) as shown in the image below.



Add InvoiceOpportunity into Opportunity Record Page



TASK 10:CREATE APEX SCHEDULER

To invoke Apex classes to run at specific times, first implement the Schedulable interface for the class. Then, schedule an instance of the class to run at a specific time using the System.schedule() method.

After you implement a class with the Schedulable interface, use the System.schedule() method to execute it. The System.schedule() method uses the user's timezone for the basis of all schedules, but runs in system mode—all classes are executed, whether or not the user has permission to execute the class.

SYNTAX :

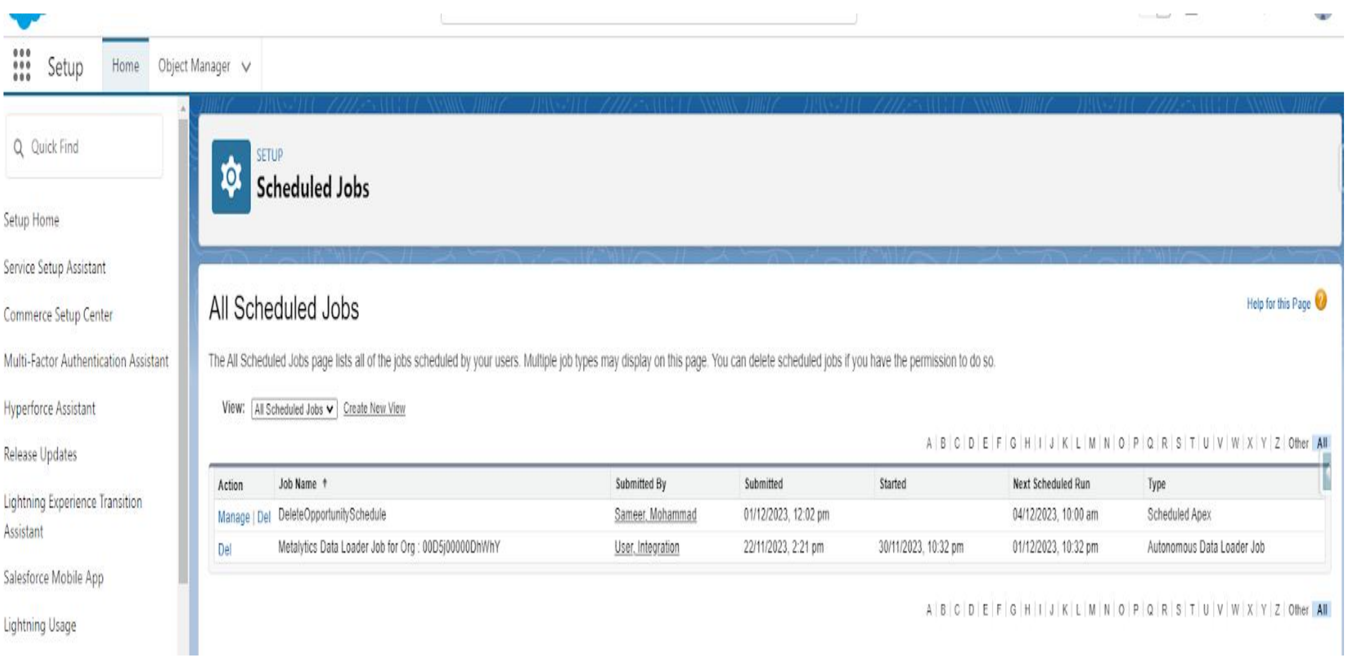
```
public class SomeClass implements Schedulable
{

   public void execute(SchedulableContext ctx)
{

      // awesome code here

 }

}
```

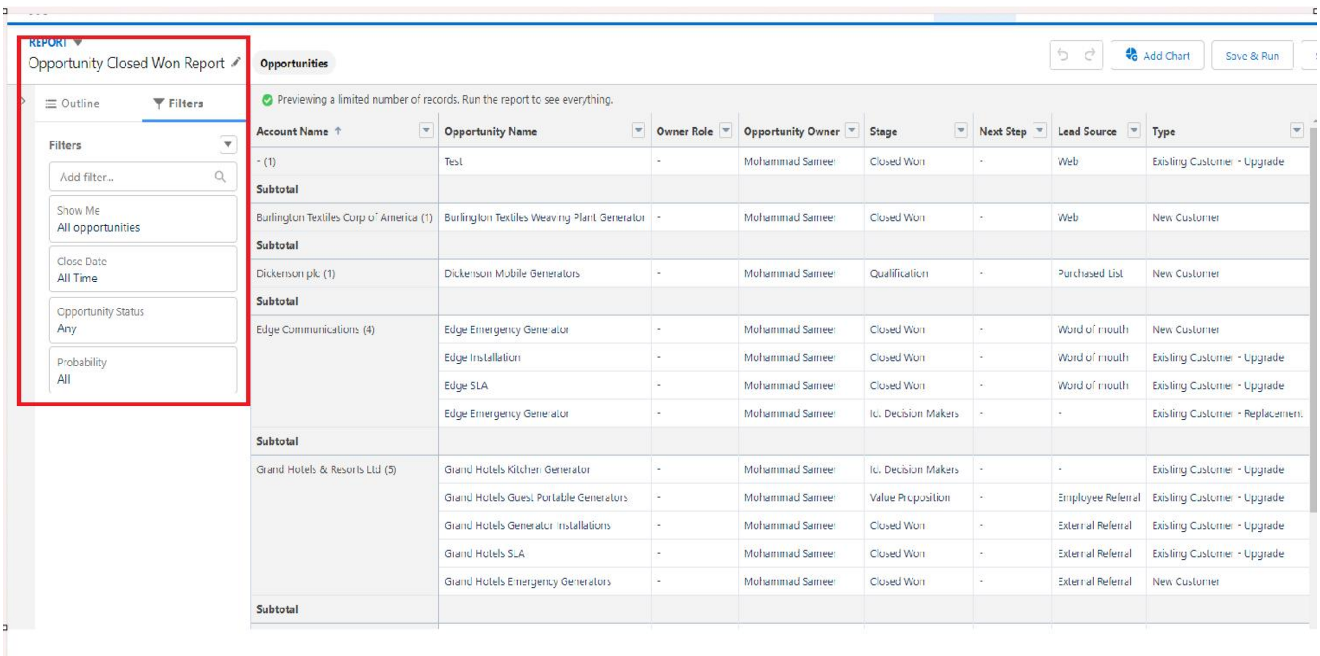

Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Commerce Setup Center
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
SETUP
Scheduled Jobs
All Scheduled Jobs
Help for this Page
The All Scheduled Jobs page lists all of the jobs scheduled by your users. Multiple job types may display on this page. You can delete scheduled jobs if you have the permission to do so.
View: All Scheduled Jobs
Create New View
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All
Action
Job Name
Submitted By
Submitted
Started
Next Scheduled Run
Type
Manage | Del
DeleteOpportunitySchedule
Sameer, Mohammad
01/12/2023, 12:02 pm
04/12/2023, 10:00 am
Scheduled Apex
Del
Metalytics Data Loader Job for Org : 00D5j00000DhWhY
User, Integration
22/11/2023, 2:21 pm
30/11/2023, 10:32 pm
01/12/2023, 10:32 pm
Autonomous Data Loader Job
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

TASK 11:CREATE REPORT

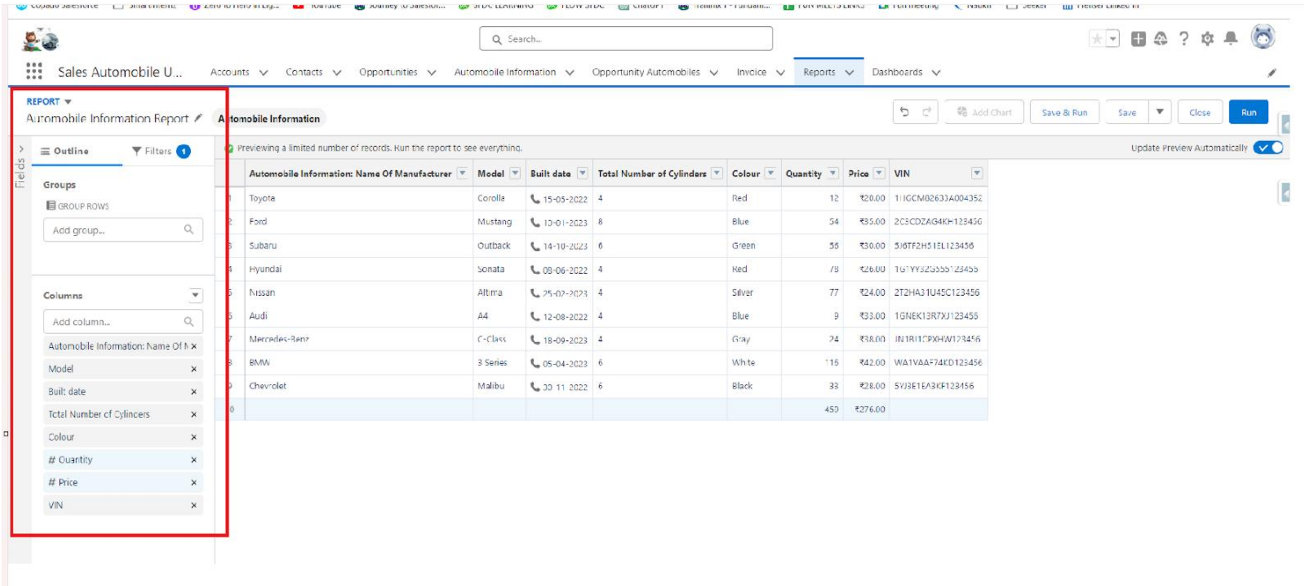
Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-tounderstand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics. Types of Reports in Salesforce

- Tabular
- Summary
- Matrix
- Joined
- Reports

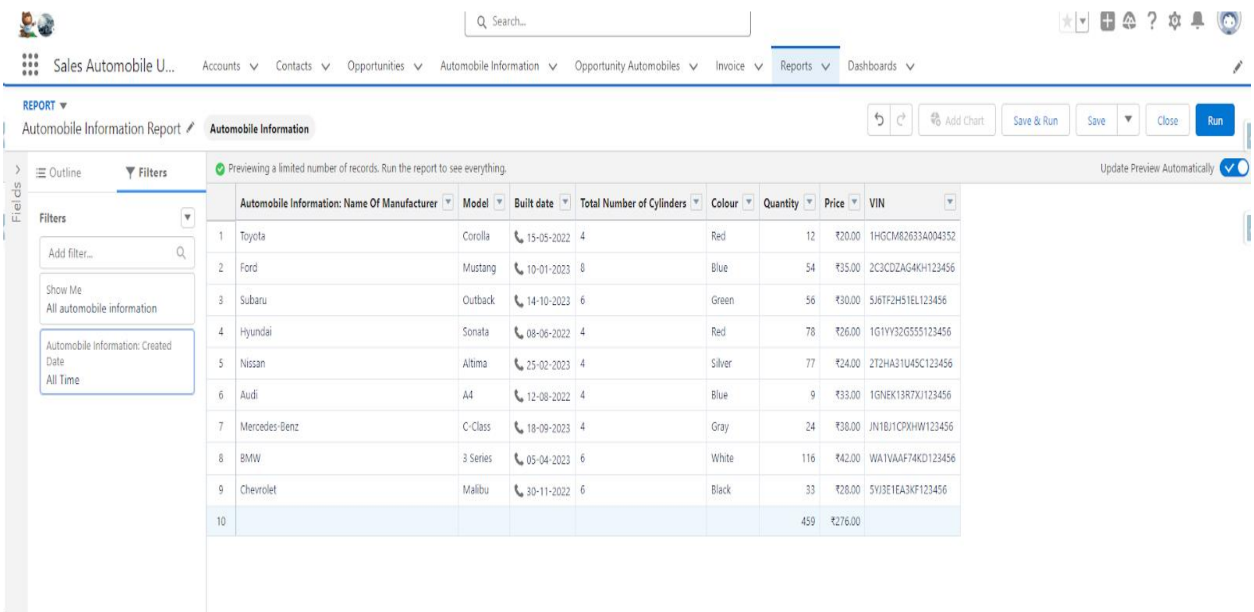
Create Report on Opportunity



Create Report on Automobile Information



Filters



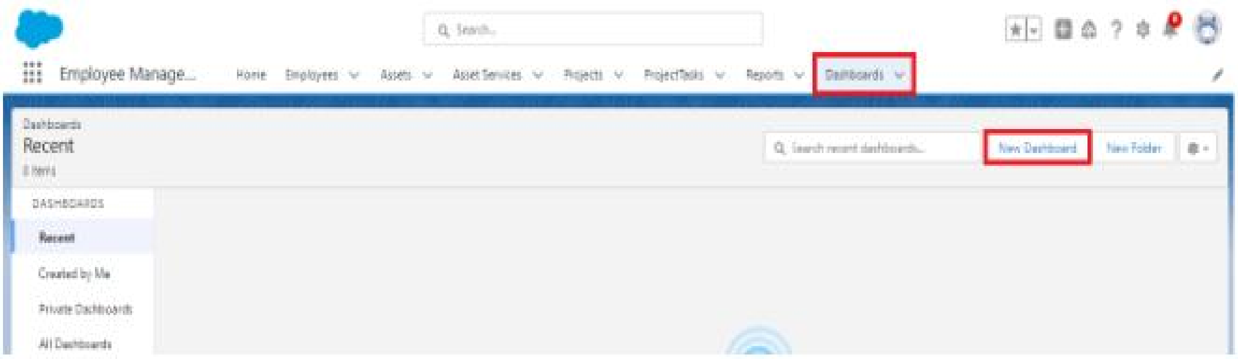
TASK 12:CREATE DASHBOARD

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

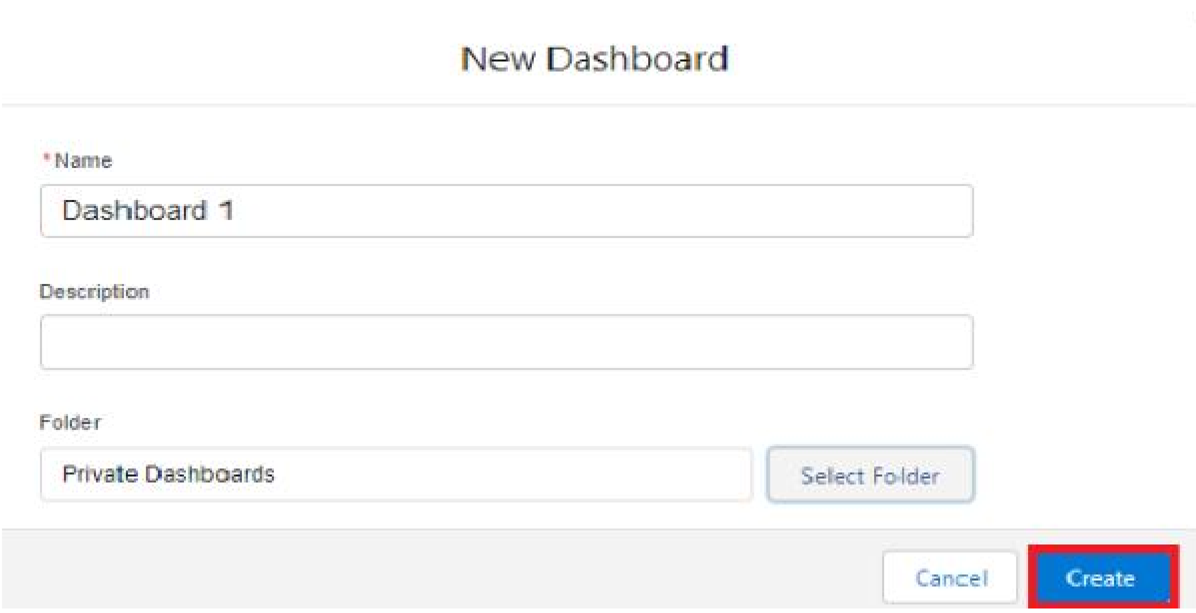
Sales Dashboard:

Create Dashboard

1. Go to the app click on the Dashboards tabs.

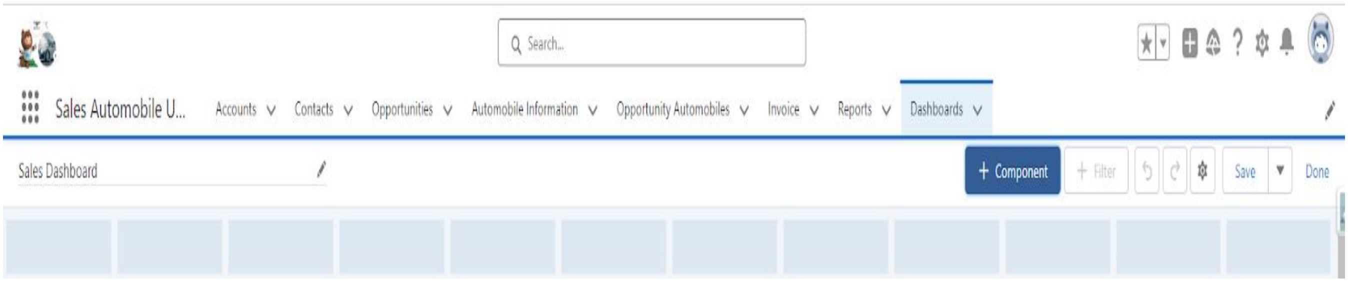


2.Give a Name and click on Create.

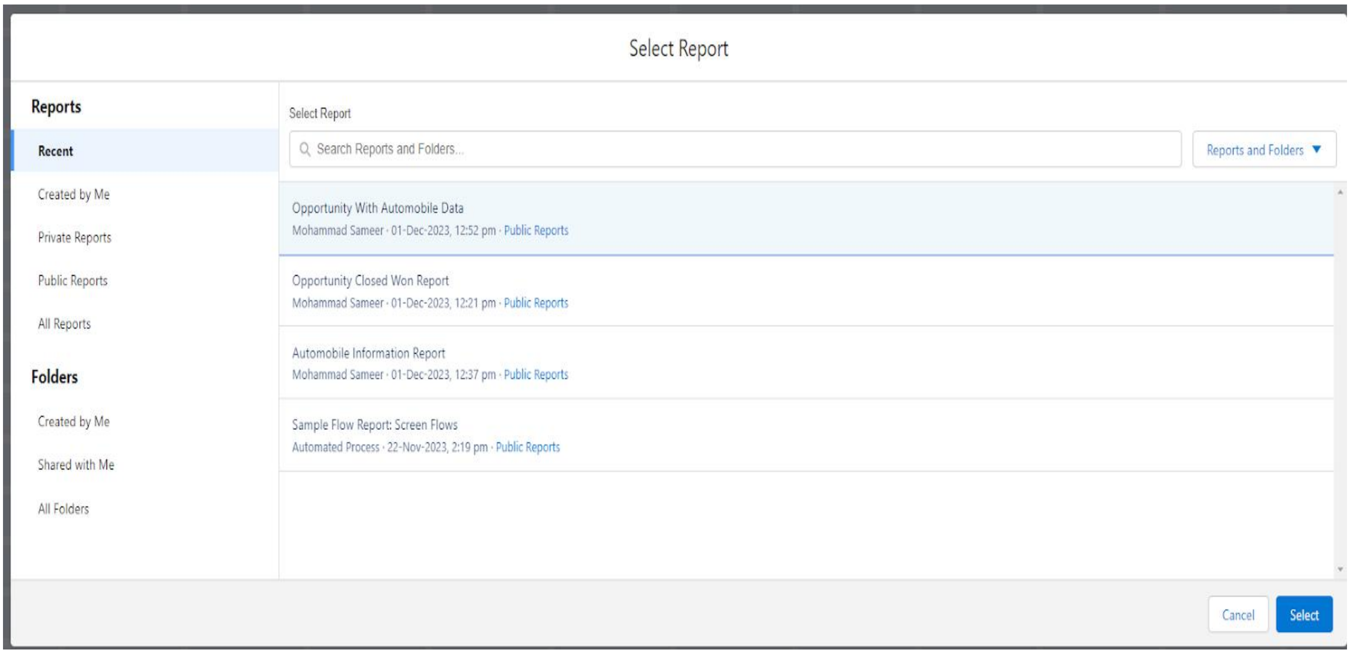


Name : Automobile Sales

3. Select add components

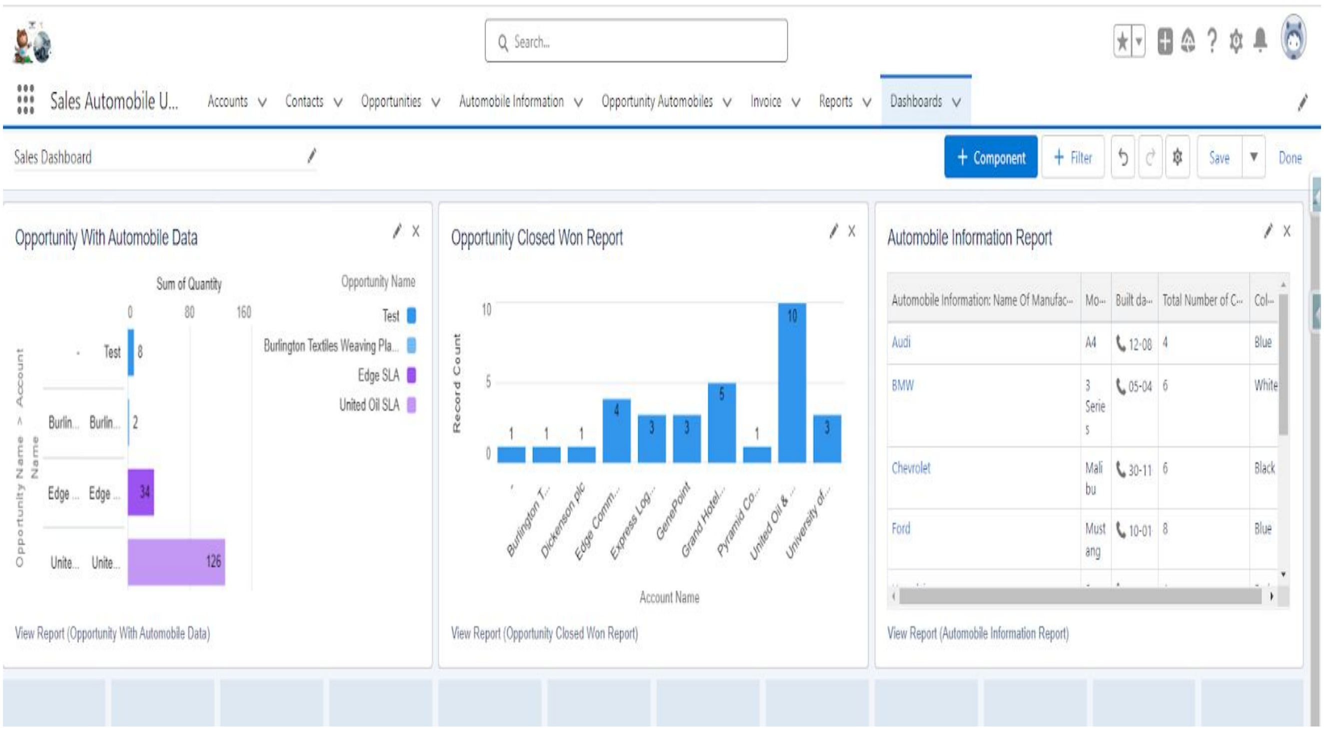


4. Select a Report and click on select.



5. Click Add then click on Save and then click on Done.

The Created Dashboard Will look like this:



CONCLUSION:

In conclusion, implementing Salesforce CRM for the automobile industry offers numerous benefits that can significantly enhance business operations. By utilizing Salesforce's robust tools, automobile companies can streamline sales, marketing, and customer service processes, leading to improved customer satisfaction, increased sales efficiency, and better customer retention.

Salesforce CRM enables automobile companies to manage customer data effectively, track leads, and automate workflows, allowing sales teams to focus on building stronger customer relationships. Additionally, the platform's real-time analytics and reporting tools help businesses make informed decisions, monitor performance, and identify new opportunities for growth.