



MAILAM
Engineering College



SALES AUTOMOBILE USING SALESFORCE CRM

A PROJECT REPORT

Submitted by

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Of

BACHELOR OF TECHNOLOGY

in

INFORMATION TECHNOLOGY

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ANNA UNIVERSITY : CHENNAI 60025



MAILAM Engineering College

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(Approved by AICTE, New Delhi, affiliated to Anna University Chennai, accredited by NAAC with "A" Grade
& A TATA Consultancy Services Accredited Institution)

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Semester : _____

Certificate

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work done by the above student in the
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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.

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INTRODUCTION

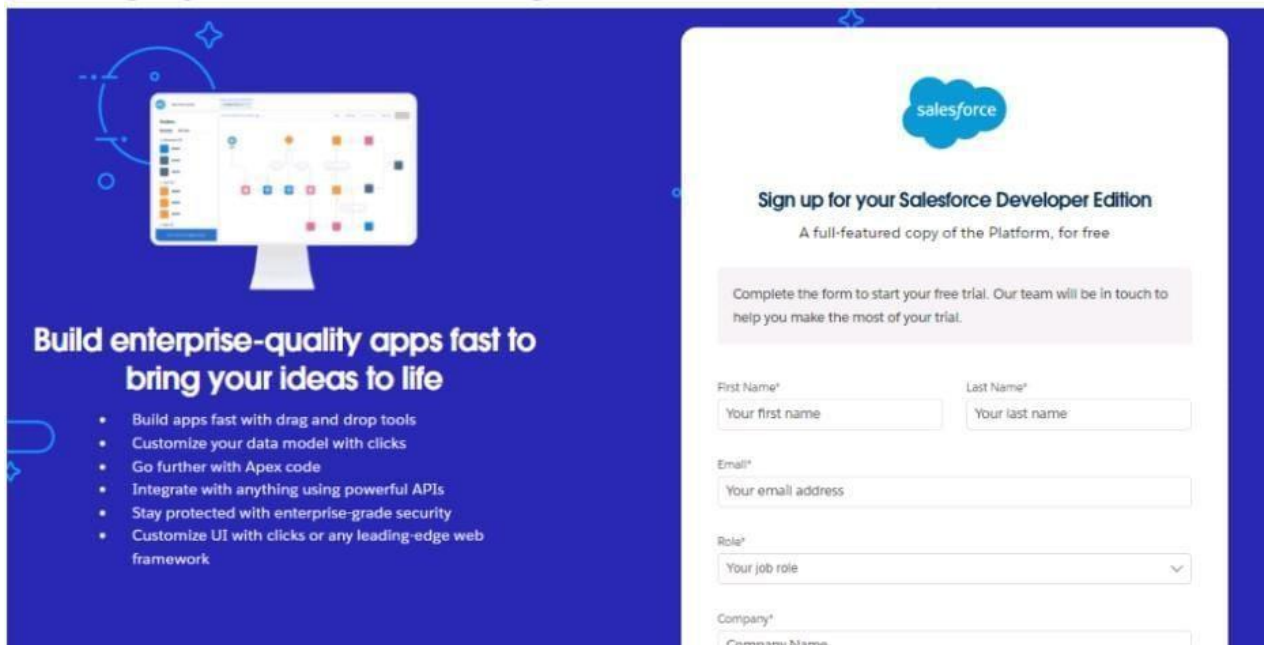
The Salesforce Automobile project leverages the powerful features of Salesforce CRM to streamline and enhance the operations of the automobile industry. Salesforce CRM is a robust platform widely recognized for its capabilities in managing customer relationships, automating workflows, and delivering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



Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

Sign up for your Salesforce Developer Edition
A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name*
Your first name

Last Name*
Your last name

Email*
Your email address

Role*
Your job role

Company*
Company Name

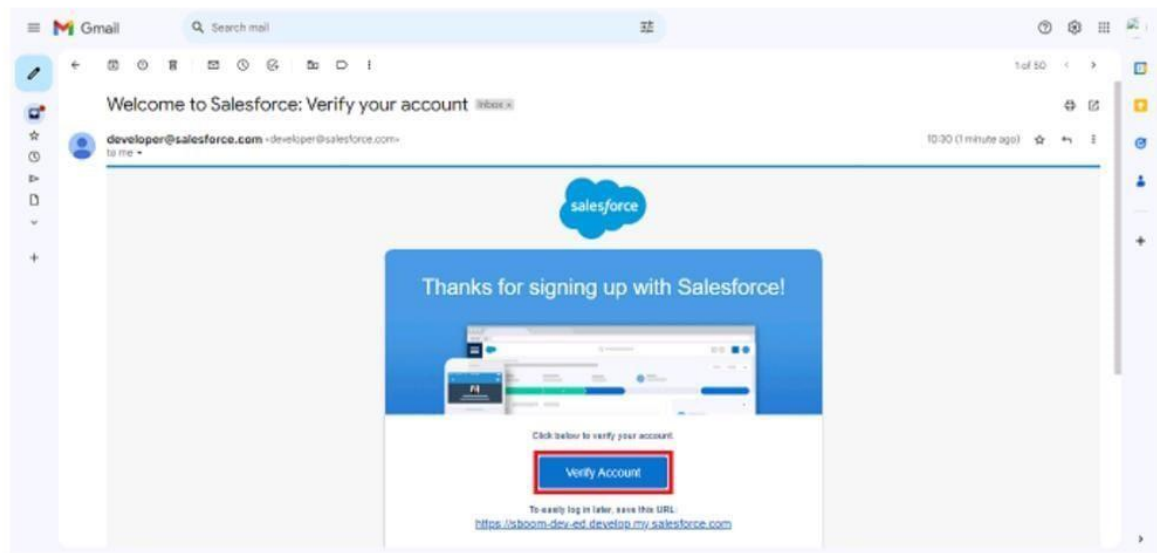
1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

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.

A screenshot of the 'Change Your Password' form. The form has a title 'Change Your Password' and a sub-header 'Enter a new password for lead@sb.oom. Make sure to include at least:'. Below this are three requirements: '8 characters', '1 letter', and '1 number', each with a green checkmark. The form contains four main sections: 'New Password' with a 'Good' status, 'Confirm New Password' with a 'Match' status, 'Security Question' with a dropdown menu showing 'In what city were you born?', and 'Answer' with the text 'asdfghjkl'. A blue 'Change Password' button is at the bottom, highlighted with a red rectangle.

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:**

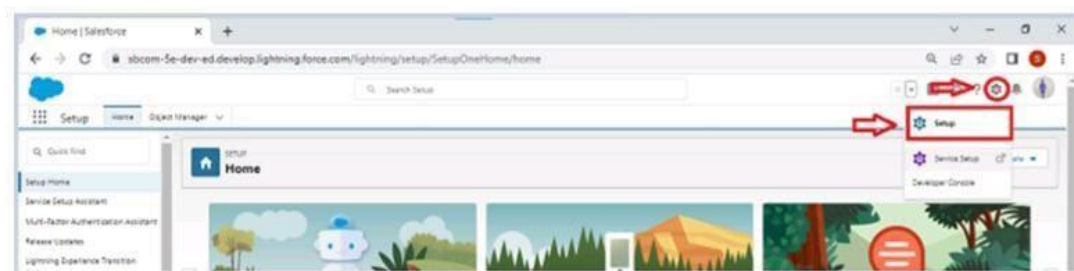
Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

- **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

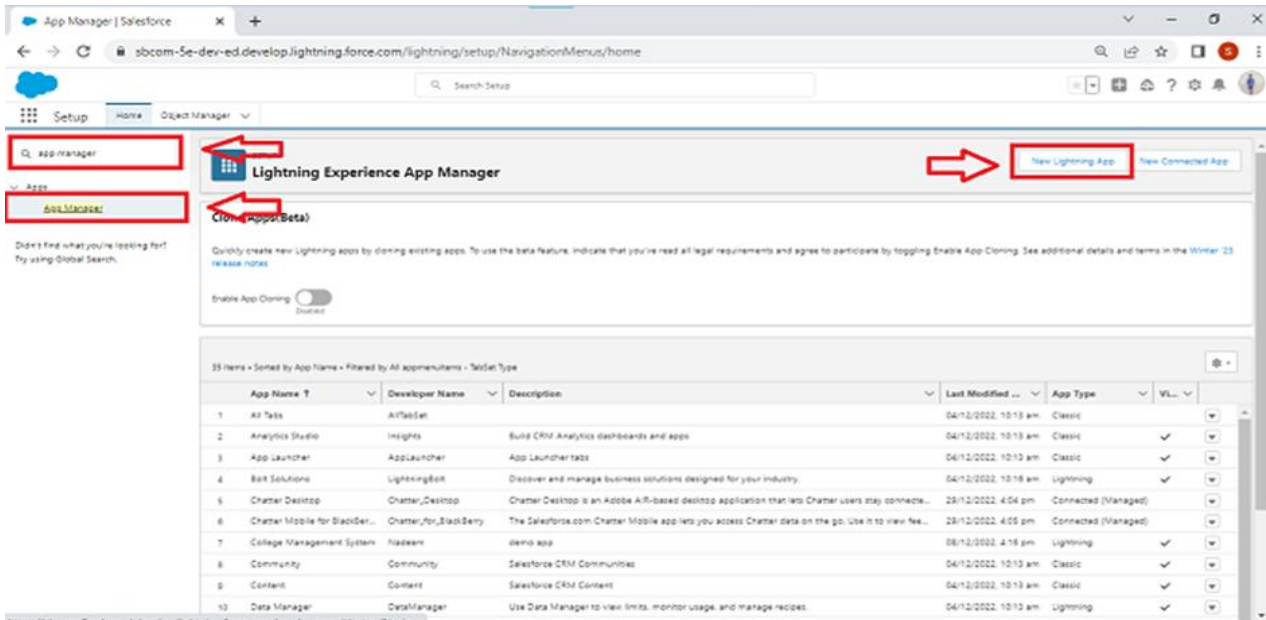
Create Custom Tabs:

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.

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

*App Name ⓘ

Name your app...

*Developer Name ⓘ

Enter a developer name...

Description ⓘ

Enter a description...

App Branding

Image ⓘ

Upload

Primary Color Hex Value

#0070C2

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

Next

4.Add Navigation Items:

New Lightning App

Navigation Items

Items will appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

Create ▼

Search Dash

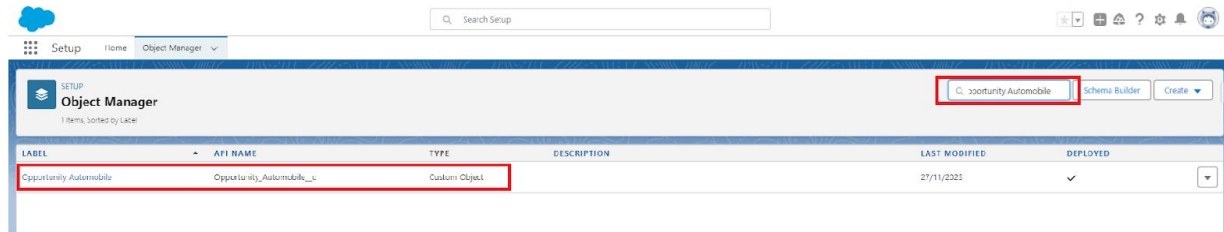
Selected Items

- Accounts
- Contacts
- Opportunities
- Automobile Information
- Automobiles
- Invoice
- Reports
- Dashboards

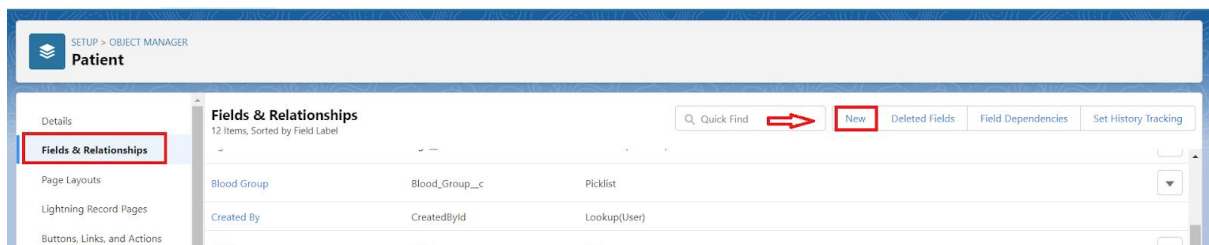
TASK 6: CREATE FIELDS & RELATIONSHIPS

To create fields in an object:

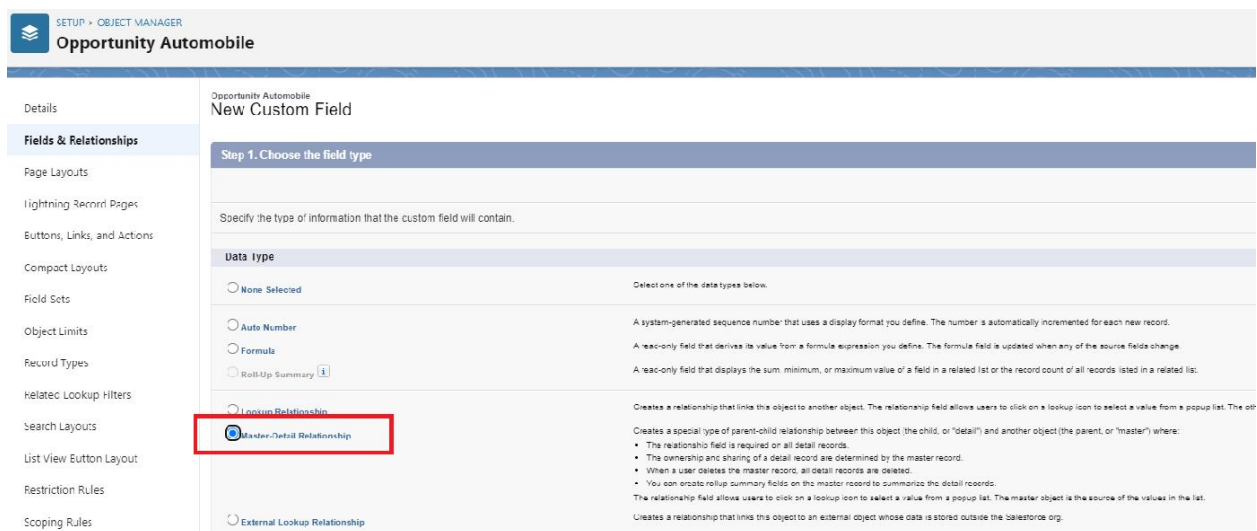
1. Go to setup >> click on Object Manager >> type object name(Opportunity Automobile) in



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.

Opportunity Automobile
New Relationship

Step 3 of 6

Step 3. Enter the label and name for the lookup field

Field Label: Opportunity

Field Name: Opportunity

Description:

Help Text:

Child Relationship Name: Opportunity_Automobiles

Sharing Setting: ☐ Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records. ☒ Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Allow reparenting: ☐ Unid records can be reparented to other parent records after they are created.

Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity.

Lookup Filter

Optionally, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

[Show Filter Settings](#)

Previous Next Cancel

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

Opportunity Automobile
New Relationship

Step 3 of 6

Step 3. Enter the label and name for the lookup field

Field Label: Automobiles

Field Name: Automobiles

Description:

Help Text:

Child Relationship Name: Opportunity_Automobiles

Required: ☐ Always require a value in this field in order to save a record.

What to do if the lookup record is deleted?: ☒ Clear the value of this field. You can't choose this option if you make this field required. ☐ Don't allow deletion of the lookup record that's part of a lookup relationship.

Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity.

Lookup Filter

Optionally, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

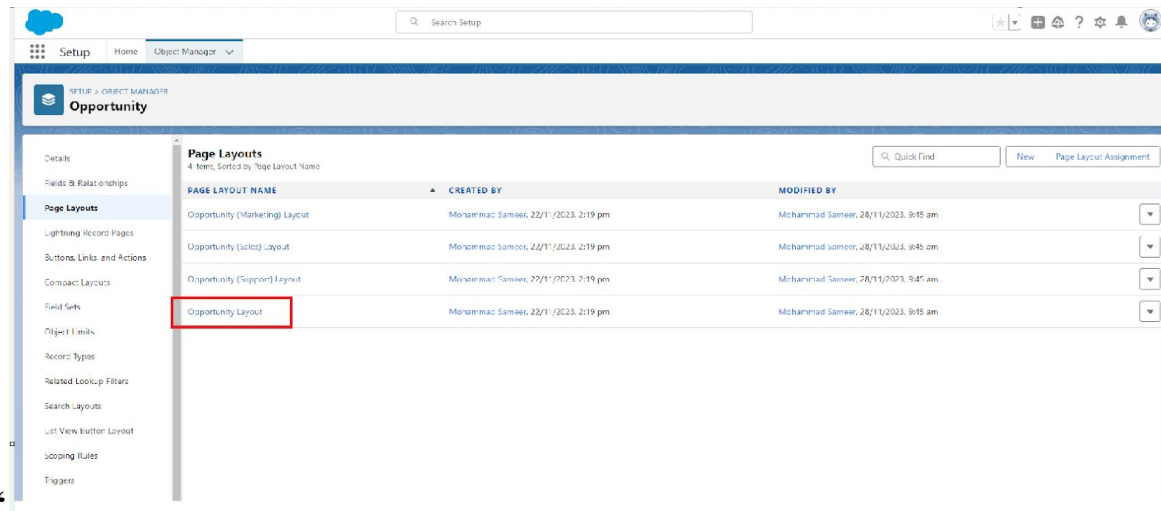
[Show Filter Settings](#)

Previous Next Cancel

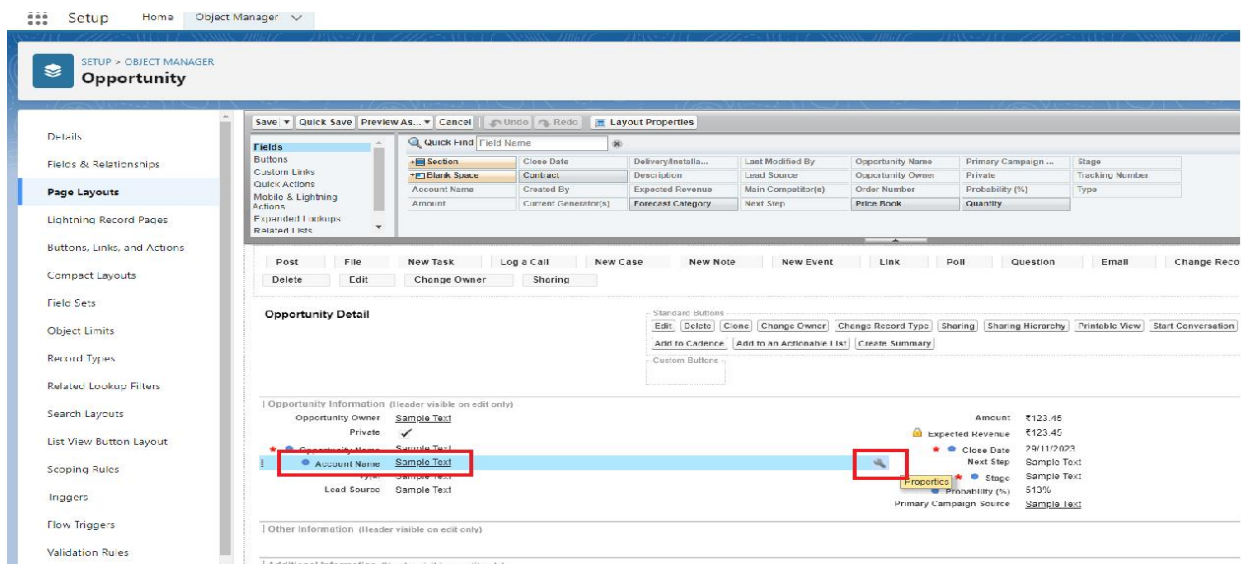
TASK 7:CREATE PAGE LAYOUTS

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. 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.

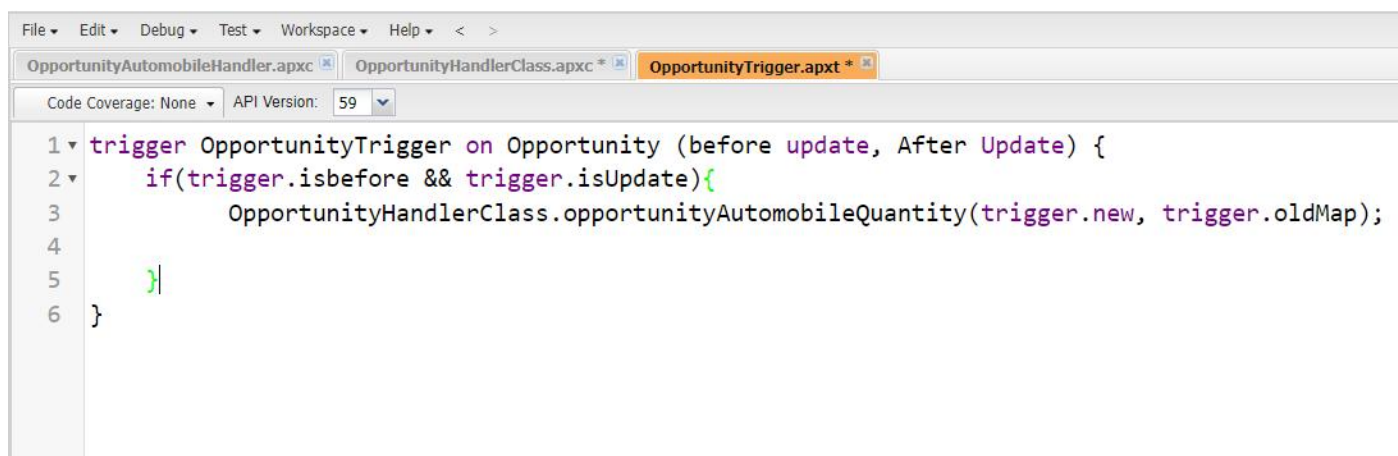
5. Click on Save.

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.

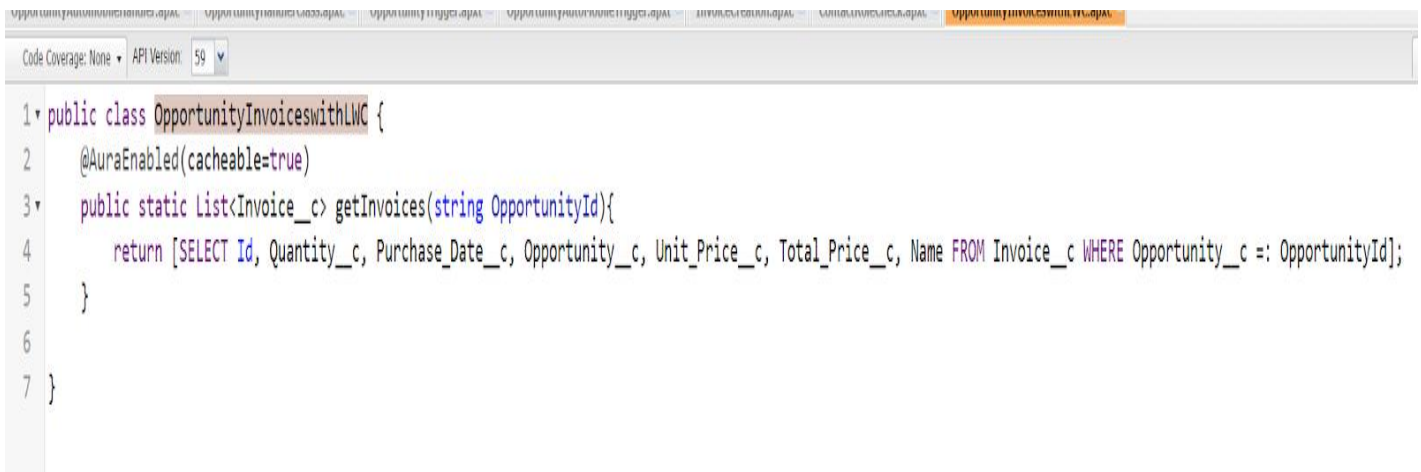


The screenshot shows an IDE window with three tabs: OpportunityAutomobileHandler.apxc, OpportunityHandlerClass.apxc, and OpportunityTrigger.apxt. The OpportunityTrigger.apxt tab is active, displaying the following Apex code:

```
1 trigger OpportunityTrigger on Opportunity (before update, After Update) {
2     if(trigger.isbefore && trigger.isUpdate){
3         OpportunityHandlerClass.opportunityAutomobileQuantity(trigger.new, trigger.oldMap);
4     }
5 }
6 }
```

TASK 9:CREATE LWC COMPONENT

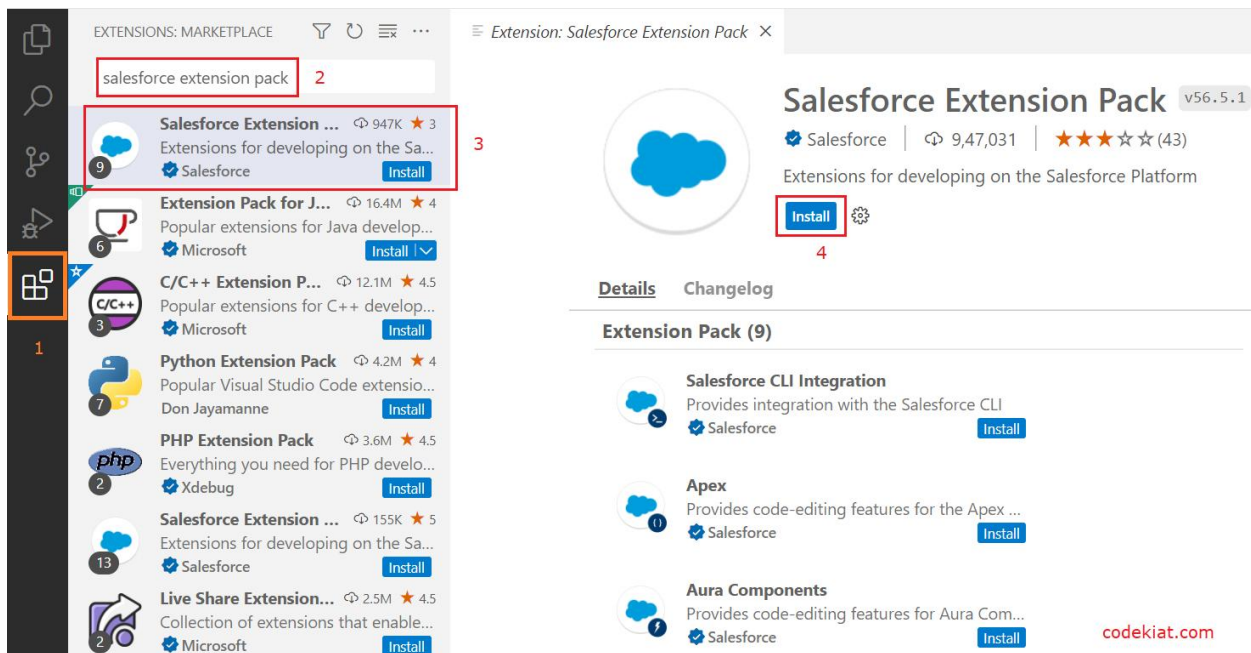
- Login to the respective account and navigate to the gear icon in the top right corner.
- Click on the Developer console.
- Now you will see a new console window.
- In the toolbar, you can see FILE.
- Click on it and navigate to new and create New apex class.



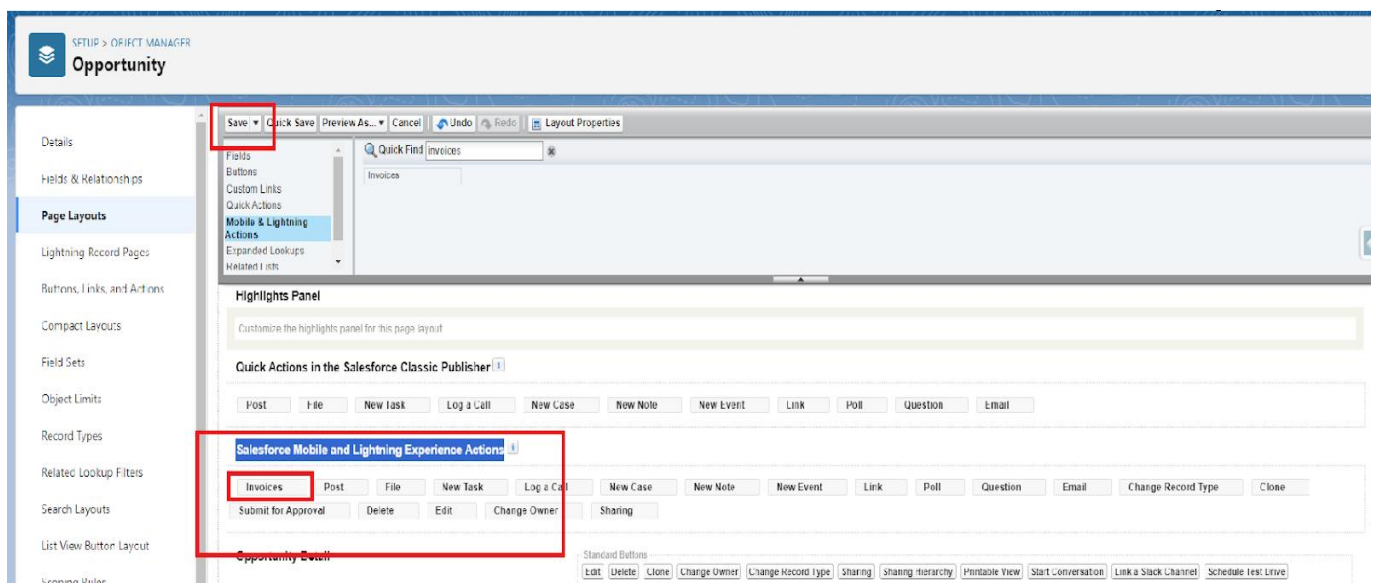
```
1 public class OpportunityInvoiceswithLWC {  
2     @AuraEnabled(cacheable=true)  
3     public static List<Invoice__c> getInvoices(string OpportunityId){  
4         return [SELECT Id, Quantity__c, Purchase_Date__c, Opportunity__c, Unit_Price__c, Total_Price__c, Name FROM Invoice__c WHERE Opportunity__c =: OpportunityId];  
5     }  
6  
7 }
```

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

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 : 00DSj00000DhWHY	User, Integration	22/11/2023, 2:21 pm	30/11/2023, 10:32 pm	01/12/2023, 10:32 pm	Autonomous Data Loader Job

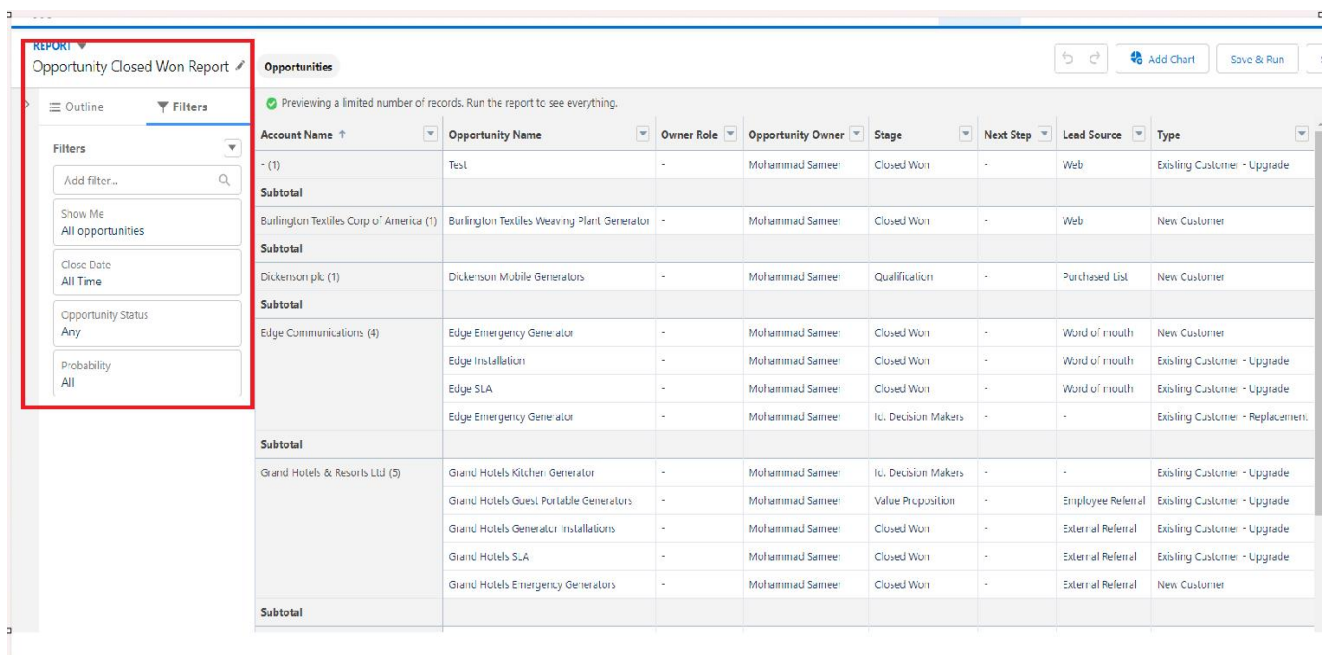
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other **All**

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-to-understand 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



The screenshot displays the Salesforce Reports interface for the 'Opportunity Closed Won Report'. A red box highlights the 'Filters' section on the left sidebar, which includes options for 'Show Me All opportunities', 'Close Date All Time', 'Opportunity Status Any', and 'Probability All'. The main table, titled 'Opportunities', shows a list of closed-won opportunities with columns for Account Name, Opportunity Name, Owner Role, Opportunity Owner, Stage, Next Step, Lead Source, and Type. The table includes subtotals for each account group.

Account Name	Opportunity Name	Owner Role	Opportunity Owner	Stage	Next Step	Lead Source	Type
- (1)	Test	-	Mohammad Sameer	Closed Won	-	Web	Existing Customer - Upgrade
Subtotal							
Burlington Textiles Corp of America (1)	Burlington Textiles Weaving Plant Generator	-	Mohammad Sameer	Closed Won	-	Web	New Customer
Subtotal							
Dickerson plc (1)	Dickerson Mobile Generators	-	Mohammad Sameer	Qualification	-	Purchased List	New Customer
Subtotal							
Edge Communications (4)	Edge Emergency Generator	-	Mohammad Sameer	Closed Won	-	Word of mouth	New Customer
	Edge Installation	-	Mohammad Sameer	Closed Won	-	Word of mouth	Existing Customer - Upgrade
	Edge SLA	-	Mohammad Sameer	Closed Won	-	Word of mouth	Existing Customer - Upgrade
	Edge Emergency Generator	-	Mohammad Sameer	In Decision Makers	-	-	Existing Customer - Replacement
Subtotal							
Grand Hotels & Resorts Ltd (5)	Grand Hotels Kitchen Generator	-	Mohammad Sameer	In Decision Makers	-	-	Existing Customer - Upgrade
	Grand Hotels Guest Portable Generators	-	Mohammad Sameer	Value Proposition	-	Employee Referral	Existing Customer - Upgrade
	Grand Hotels Generator Installations	-	Mohammad Sameer	Closed Won	-	External Referral	Existing Customer - Upgrade
	Grand Hotels S&A	-	Mohammad Sameer	Closed Won	-	External Referral	Existing Customer - Upgrade
	Grand Hotels Emergency Generators	-	Mohammad Sameer	Closed Won	-	External Referral	New Customer
Subtotal							

Create Report on Automobile Information

REPORT Automobile Information Report

Previewing a limited number of records. Run the report to see everything.

Automobile Information: Name Of Manufacturer	Model	Built date	Total Number of Cylinders	Colour	Quantity	Price	VIN
Toyota	Corolla	15-05-2022	4	Red	12	₹20.00	1HGCM82633A004352
Ford	Mustang	10-01-2023	8	Blue	54	₹35.00	2C3CDZAG4KH123456
Subaru	Outback	14-10-2023	6	Green	56	₹30.00	5J8TF2H51EL123456
Hyundai	Sonata	08-06-2022	4	Red	78	₹26.00	1G1YY2G555123456
Nissan	Altima	25-02-2023	4	Silver	77	₹24.00	2T2HA31U45C123456
Audi	A4	12-08-2022	4	Blue	9	₹33.00	1GNEK13R7X123456
Mercedes-Benz	C-Class	18-09-2023	4	Gray	24	₹38.00	JN1B11CP0XHW123456
BMW	3 Series	05-04-2023	6	White	116	₹42.00	WAT1VAA74KD123456
Chevrolet	Malibu	30-11-2022	6	Black	33	₹28.00	5V13E1E3KF123456
					459	₹276.00	

Filters

REPORT Automobile Information Report

Previewing a limited number of records. Run the report to see everything.

Automobile Information: Name Of Manufacturer	Model	Built date	Total Number of Cylinders	Colour	Quantity	Price	VIN
1 Toyota	Corolla	15-05-2022	4	Red	12	₹20.00	1HGCM82633A004352
2 Ford	Mustang	10-01-2023	8	Blue	54	₹35.00	2C3CDZAG4KH123456
3 Subaru	Outback	14-10-2023	6	Green	56	₹30.00	5J8TF2H51EL123456
4 Hyundai	Sonata	08-06-2022	4	Red	78	₹26.00	1G1YY2G555123456
5 Nissan	Altima	25-02-2023	4	Silver	77	₹24.00	2T2HA31U45C123456
6 Audi	A4	12-08-2022	4	Blue	9	₹33.00	1GNEK13R7X123456
7 Mercedes-Benz	C-Class	18-09-2023	4	Gray	24	₹38.00	JN1B11CP0XHW123456
8 BMW	3 Series	05-04-2023	6	White	116	₹42.00	WAT1VAA74KD123456
9 Chevrolet	Malibu	30-11-2022	6	Black	33	₹28.00	5V13E1E3KF123456
10					459	₹276.00	

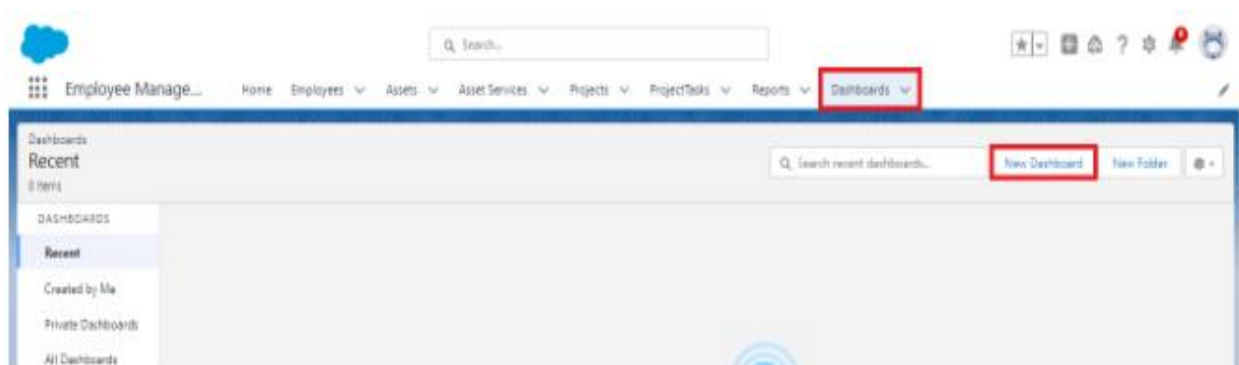
TASK 12:CREATE DASHBOARD

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.

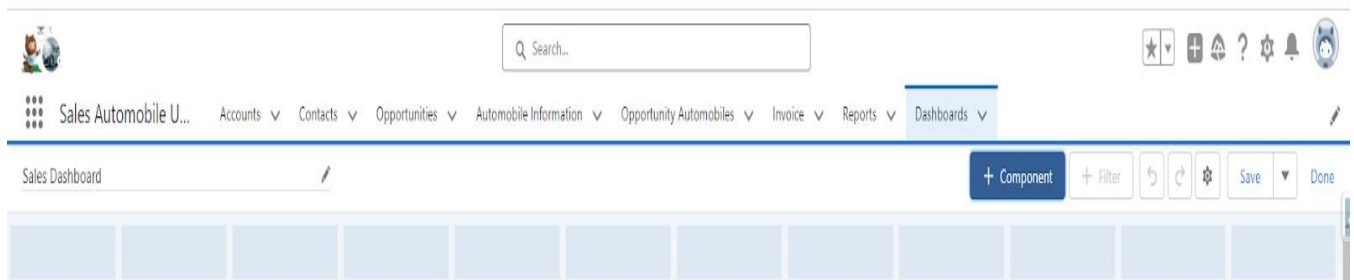


2. Give a Name and click on Create.

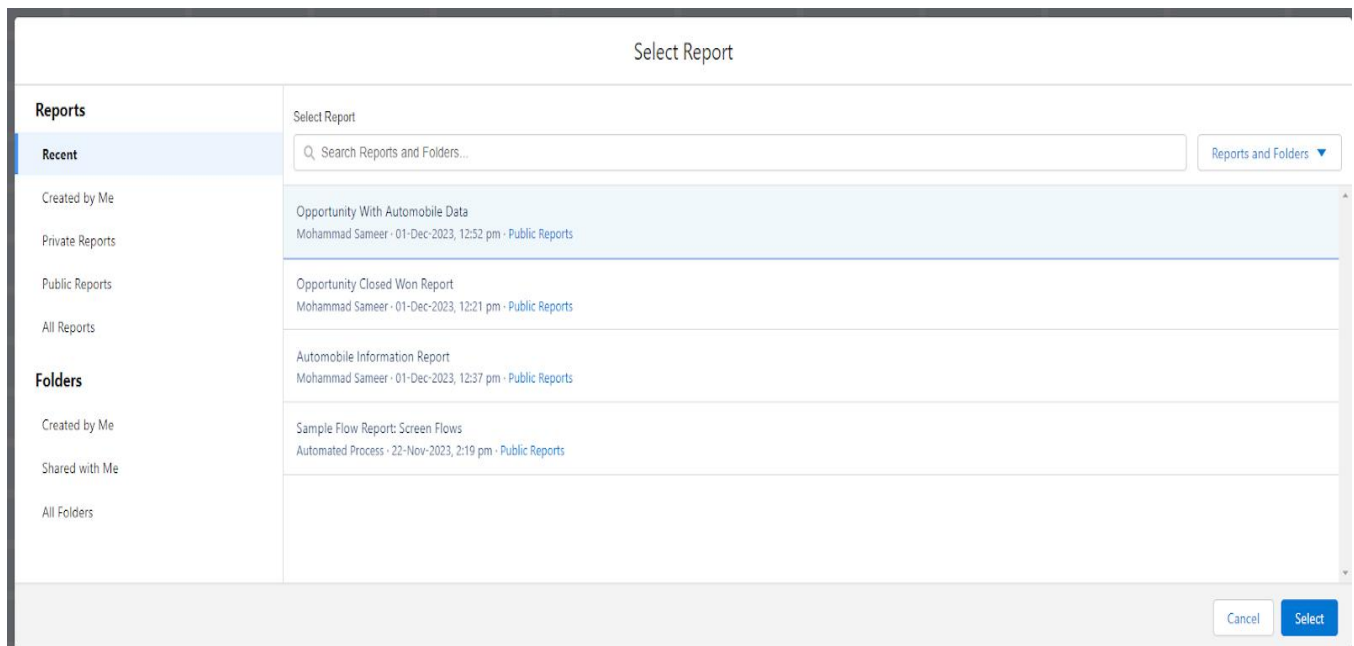
A screenshot of the 'New Dashboard' form. The form has a title 'New Dashboard' at the top. Below the title, there are three input fields: 'Name' (with a red asterisk indicating it is required), 'Description', and 'Folder'. The 'Name' field contains the text 'Dashboard 1'. The 'Folder' field contains the text 'Private Dashboards'. To the right of the 'Folder' field is a 'Select Folder' button. At the bottom right of the form, there are two buttons: 'Cancel' and 'Create'. The 'Create' button is highlighted with a red box.

Name : Automobile Sales

3. Select add components

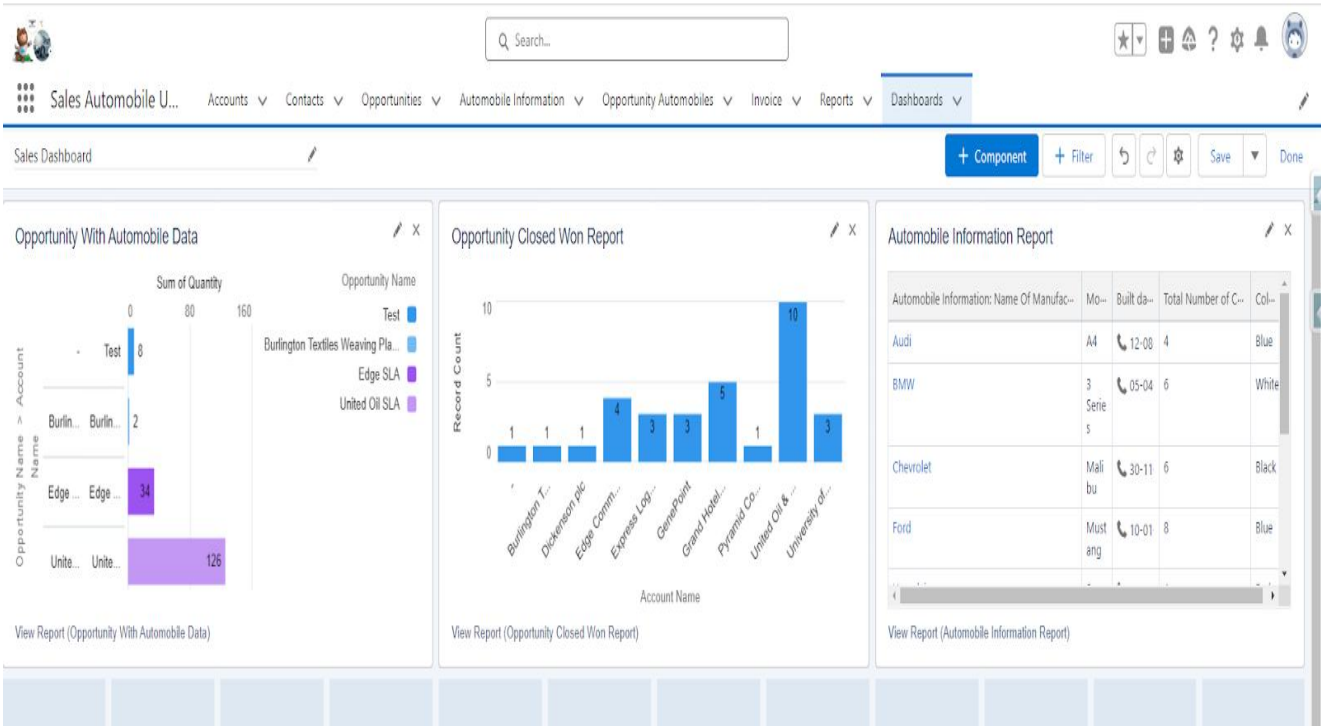


4. Select a Report and click on select.



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.