

INTERNSHIP REPORT

ON



SALES AUTOMOBILE USING SALESFORCE CRM DEVELOPER

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SALES AUTOMOBILE USING SALESFORCE CRM – (DEVELOPER)

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,

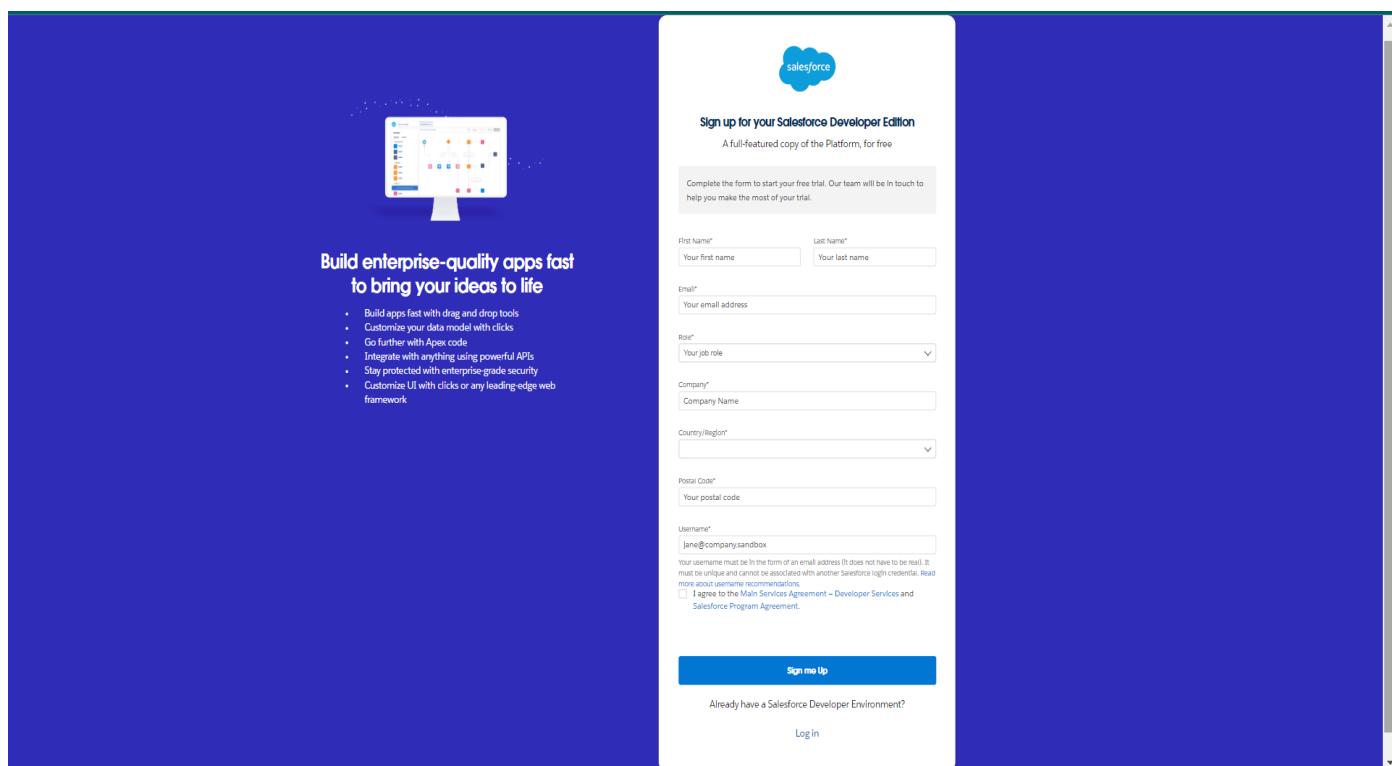
allowing for personalized marketing strategies and targeted campaigns.

1) SALESFORCE :

Salesforce is your customer success platform, designed to help you sell, service, market, analyze and connect with your customers.

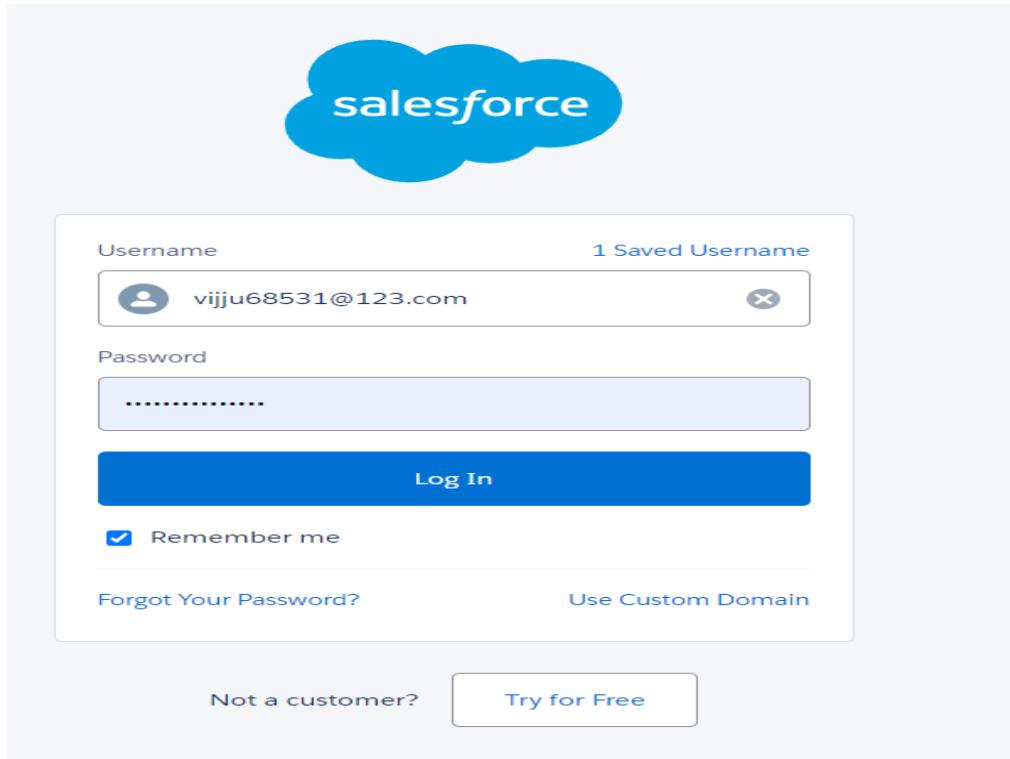
Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

CREATING DEVELOPER ACCOUNT :



USER NAME : viju68531@123.com
PASSWORD : Vijaya68531@123

Account Activation :



2) OBJECT:

Creating an object in Salesforce organization is essential for efficient data management and process automation. By defining custom objects, businesses can structure and store data specific to their needs, enabling streamlined workflows, personalized reporting, and enhanced user experiences. Objects serve as the foundation for organizing and leveraging critical information within Salesforce.

Create Automobile Information Object :

CSV File Details

Encoding Format: Unicode (UTF-8) Values Separated By: Comma Field Label Source: Enter manually Field Labels Row: 1 Import \$ rows of Data?: Yes, import data Record Name Field: Let Salesforce Create a Default R

Fields 15 of 15 to import Hide mapped fields

IMPORT FILE FIELD NAME	SALESFORCE FIELD NAME	SALESFORCE FIELD TYPE	ADD TO LAYOUTS	FIELD PREVIEW
User Name	User Name	Email	<input checked="" type="checkbox"/>	chris@contoso.com
First Name	First Name	Text	<input checked="" type="checkbox"/>	Chris
Last Name	Last Name	Text	<input checked="" type="checkbox"/>	Green
Display Name	Display Name	Text	<input checked="" type="checkbox"/>	Chris Green
Job Title	Job Title	Text	<input checked="" type="checkbox"/>	IT Manager
Department	Department	Text	<input checked="" type="checkbox"/>	Information Technology
Office Number	Office Number	Integer	<input checked="" type="checkbox"/>	123451
Office Phone	Office Phone	Phone	<input checked="" type="checkbox"/>	123 555-1211

Back Next

Create Invoice Object :

SETUP > OBJECT MANAGER

Import_User_Sample_en

Details

Description

API Name: Import_Invoice_ID_c

Custom

Singular Label: Import_User_Sample_en

Plural Label: Import_User_Sample_en

Enable Reports: ✓

Track Activities: ✓

Track Field History

Deployment Status: Deployed

Help Settings: Standard salesforce.com Help Window

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Edit Delete

Create Automobile Object :

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

- Object Name:** Opportunity Automobile
- Description:** (empty)
- API Name:** Opportunity_Automobile_c
- Type:** Custom
- Singular Label:** Opportunity Automobile
- Plural Label:** Opportunity Automobiles
- Enable Reports:** checked
- Track Activities:** (empty)
- Track Field History:** (empty)
- Deployment Status:** Deployed
- Help Settings:** Standard salesforce.com Help Window

The left sidebar lists various configuration options for the object.

3) TABS :

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

Creating a custom Tab :

Custom object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

Creating Objects and storing organization's data is the very first step in the requirements they want. Now to access the stored data by an employee from the organization Admin needs to create Tabs. By designing a dedicated Tab, businesses can improve user experience, simplify navigation, and provide quick access to critical information,

enhancing productivity and ensuring efficient utilization of Salesforce's capabilities.

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar has a search bar and navigation links for 'Setup', 'Home', and 'Object Manager'. The main content area has a search bar at the top right. The 'Tabs' page title is 'SETUP Tabs'. It includes a 'Custom Tabs' section with a note about creating new tabs to extend functionality. Below it are sections for 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs'. Under 'Custom Object Tabs', there is a table with one row for 'Houses' (Tab Style: Box). Under 'Lightning Page Tabs', there is a table with one row for 'Filter Card' (Tab Style: Card).

Action	Label	Tab Style	Description
Edit Del	Houses	Box	

Action	Label	Tab Style	Description
Edit Del	Filter Card	Card	Created by: Admin on 01/01/2023

4) THE LIGHTNING APP :

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps gives users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

APP MANAGER

SETUP

Lightning Experience App Manager

New Lightning App | New Connected App

Apps

App Manager

Didn't find what you're looking for?
Try using Global Search.

App Name	Developer Name	Description	Last Modified ...	App ...	V. ↓
Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and ...	24/02/2024, 3:06 am	Lightning	✓
Dreamhouse	Dreamhouse		17/04/2024, 12:48 pm	Lightning	✓
Sales Automobile Using ...	Sales_Automobile_U...	Give a meaningful description	10/04/2024, 9:29 pm	Lightning	✓
Apsche	Apsche	This is apsche university application.	08/03/2024, 8:05 pm	Lightning	✓
Sales Console	LightningSalesConso...	(Lightning Experience) Lets sales reps work with multiple records on ...	24/02/2024, 3:06 am	Lightning	✓
Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple recor...	24/02/2024, 3:06 am	Lightning	✓
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	24/02/2024, 3:08 am	Lightning	✓
Salesforce Scheduler Set...	LightningScheduler	Set up personalized appointment scheduling.	24/02/2024, 3:08 am	Lightning	✓
Commerce	Commerce	Manage your store's products, catalogs, and pricebooks.	24/02/2024, 3:06 am	Lightning	✓
Lightning Usage App	LightningInstrument...	View Adoption and Usage Metrics for Lightning Experience	24/02/2024, 3:06 am	Lightning	✓
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	24/02/2024, 3:06 am	Classic	✓
Content	Content	Salesforce CRM Content	24/02/2024, 3:06 am	Classic	✓
Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	24/02/2024, 3:06 am	Classic	✓
Community	Community	Salesforce CRM Communities	24/02/2024, 3:06 am	Classic	✓

5) FIELDS AND RELATIONSHIPS :

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application.

Creating Opportunity Master Detail Relationship Field In Opportunity Automobile Object :

Opportunity Automobile Custom Field
Opportunity Automobile

Field Information

Field Label:	Opportunity Automobile	Object Name:	Opportunity_Automobile
Field Name:	Opportunity_Automobile	Data Type:	Lookup
API Name:	Opportunity_Automobile		
Description:			
Help Text:			
Data Owner:			
Field Usage:			
Date Sensitivity Level:			
Compliance Categorization:			
Created By:	Akashvi Vilaya Lakshmi	Modified By:	Akashvi Vilaya Lakshmi
	17/04/2024, 6:31 pm	17/04/2024, 6:31 pm	

Lookup Options

Related To:	Opportunity_Automobiles	Child Relationship Name:	Opportunity_Automobiles
Related List Label:	Opportunity Automobiles		
Required:	<input checked="" type="checkbox"/>		
What to do if the lookup record is deleted?	Clear the value of this field.		

Validation Rules

No validation rules defined.

Creating The Automobile Information Lookup Field In Opportunity Automobile Object :

Opportunity Automobile Field
Opportunity Automobile Name

Field Information

Field Label:	Opportunity Automobile Name	Field Name:	Name
Data Type:	Auto Number		
Description:			
Data Owner:			
Field Usage:			
Date Sensitivity Level:			
Compliance Categorization:			
Display Format:	OA-(0000)		

Creating Quantity Number Field In Opportunity Automobile Object :

The screenshot shows the Salesforce Setup interface for creating a custom field. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Opportunity Automobile Custom Field Quantity'. It shows the 'Custom Field Definition Detail' page with tabs for Edit, Set Field-Level Security, View Field Accessibility, and Where is this used?. The 'Field Information' section includes fields for Field Label (Quantity), Field Name (Quantity), API Name (Quantity__c), Description, Help Text, Data Owner, and Field Usage. The 'Object Name' is Opportunity_Automobile and 'Data Type' is Number. The 'General Options' section includes Required (unchecked), Unique (unchecked), External ID (unchecked), AI Prediction (unchecked), and Default Value. The 'Number Options' section shows Length as 18 and Decimal Places as 0. The 'Validation Rules' section indicates 'No validation rules defined'. A 'Help for this Page' link is at the top right.

Creating Formula Field In Opportunity Automobile Object :

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar lists various setup categories. The main area is titled 'Opportunity Automobile New Custom Field' and is on 'Step 3. Enter formula'. It shows a text input field with the placeholder 'Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.' An example 'Gross Margin = Amount - Cost__c' is shown with a 'More Examples...' link. Below the input field are tabs for Simple Formula and Advanced Formula, with Simple Formula selected. To the right is a 'Quick Tips' box with links to 'Getting Started' and 'Operators & Functions'. A large sidebar on the right contains a 'Functions' list with categories like ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, and a 'Insert Selected Function' button. Buttons for Previous, Next, and Cancel are at the top right of the step header.

Creating The Formula Field In Opportunity Automobile Object :

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar is titled 'Fields & Relationships' and lists various setup options. The main area is titled 'Opportunity Automobile' and 'New Custom Field'. The sub-step 'Step 3. Enter formula' is selected. The formula being created is 'Total Price (Currency) = Unit Price_c * Quantity_c'. A tooltip provides an example: 'Gross Margin = Amount - Cost_c'. A 'Simple Formula' tab is selected. To the right, there's a 'Quick Tips' box with links to 'Getting Started' and 'Operators & Functions'. A 'Functions' dropdown menu is open, showing options like ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN. A 'Help for this Page' link is at the top right.

Updating Field In Invoice Object :

The screenshot shows the Salesforce Setup interface for updating a custom field. The left sidebar is titled 'Fields & Relationships' and lists various setup options. The main area is titled 'Opportunity Automobile Custom Field' and 'Invoice id'. The sub-step 'Custom Field Definition Detail' is selected. The 'Field Information' section shows the field is named 'Invoice id' with a data type of 'Number' for the 'Opportunity Automobile' object. The 'General Options' section includes fields for 'Required', 'Unique', 'External ID', 'AI Prediction', and 'Default Value'. The 'Number Options' section shows a length of 18 and 0 decimal places. The 'Validation Rules' section indicates 'No validation rules defined'. A 'Validation Rules Help' link is at the bottom right.

Creating Remaining Fields In Objects :

The screenshot shows the Salesforce Setup interface under the Object Manager section for the 'Opportunity Automobile' object. A custom field named 'Invoice id' is being created. The field is defined as a Number type with a length of 18 and no decimal places. It has a validation rule link.

Field Label	Invoice id	Object Name	Opportunity Automobile
Field Name	Invoice_id	Data Type	Number
API Name	Invoice_id_c		
Description			
Help Text			
Data Owner			
Field Usage	Active		
Data Sensitivity Level			
Compliance Categorization			
Created By	Akasapu Vijaya Lakshmi	Modified By	Akasapu Vijaya Lakshmi
	17/04/2024, 7:05 pm		17/04/2024, 7:10 pm

General Options:

- Required:
- Unique:
- External ID:
- AI Prediction:
- Default Value:

Number Options:

- Length: 18
- Decimal Places: 0

Validation Rules:

- No validation rules defined.

6) Page Layouts :

Page Layout in Salesforce allows us to customize the design and organize detail and edit pages of records in Salesforce. Page layouts can be used to control the appearance of fields, related lists, and custom links on standard and custom objects' detail and edit pages.

Hurray!! you have completed the data model structure for your organization but while looking at the detailed and edit pages it seems to be so clumsy, so decide to organize the page in a pleasant way for the sake of good and pleasant appearance and assemble all different kinds of information in different sections in order.

Edit The Page Layout For Opportunity Object :

The screenshot shows the Salesforce Setup interface for editing a custom field. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The main title is 'Opportunity Automobile'. On the left, a sidebar lists various setup categories like 'Details', 'Fields & Relationships', and 'Page Layouts'. The central panel displays the 'Custom Field Definition Detail' for 'Invoice id'. It shows the field label 'Invoice id', field name 'Invoice_id', API name 'Invoice_id__c', and data type 'Number'. Other details include 'Object Name: Opportunity_Automobile', 'Created By: Akasapu Vijaya Lakshmi (17/04/2024, 7:05 pm)', and 'Modified By: Akasapu Vijaya Lakshmi (17/04/2024, 7:10 pm)'. Sections for 'General Options' and 'Number Options' are also visible.

Edit The Page Layout For Automobiles Information :

The screenshot shows the Salesforce Setup interface for editing a page layout. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. The main title is 'Opportunity Automobile'. On the left, a sidebar lists various setup categories like 'Details', 'Fields & Relationships', and 'Page Layouts'. The central panel displays the 'Opportunity Automobile Layout' configuration. It includes sections for 'Fields' (Buttons, Quick Actions, Mobile & Lightning Actions, Expanded Lookups, Related Lists, Report Charts), 'Opportunity Automobile Sample' (Highlights Panel, Quick Actions in the Salesforce Classic Publisher, Salesforce Mobile and Lightning Experience Actions), and 'Opportunity Automobile Detail' (Standard Buttons: Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Custom Buttons). A note at the bottom states 'Information (Header visible on edit only)'.

7) Apex Trigger :

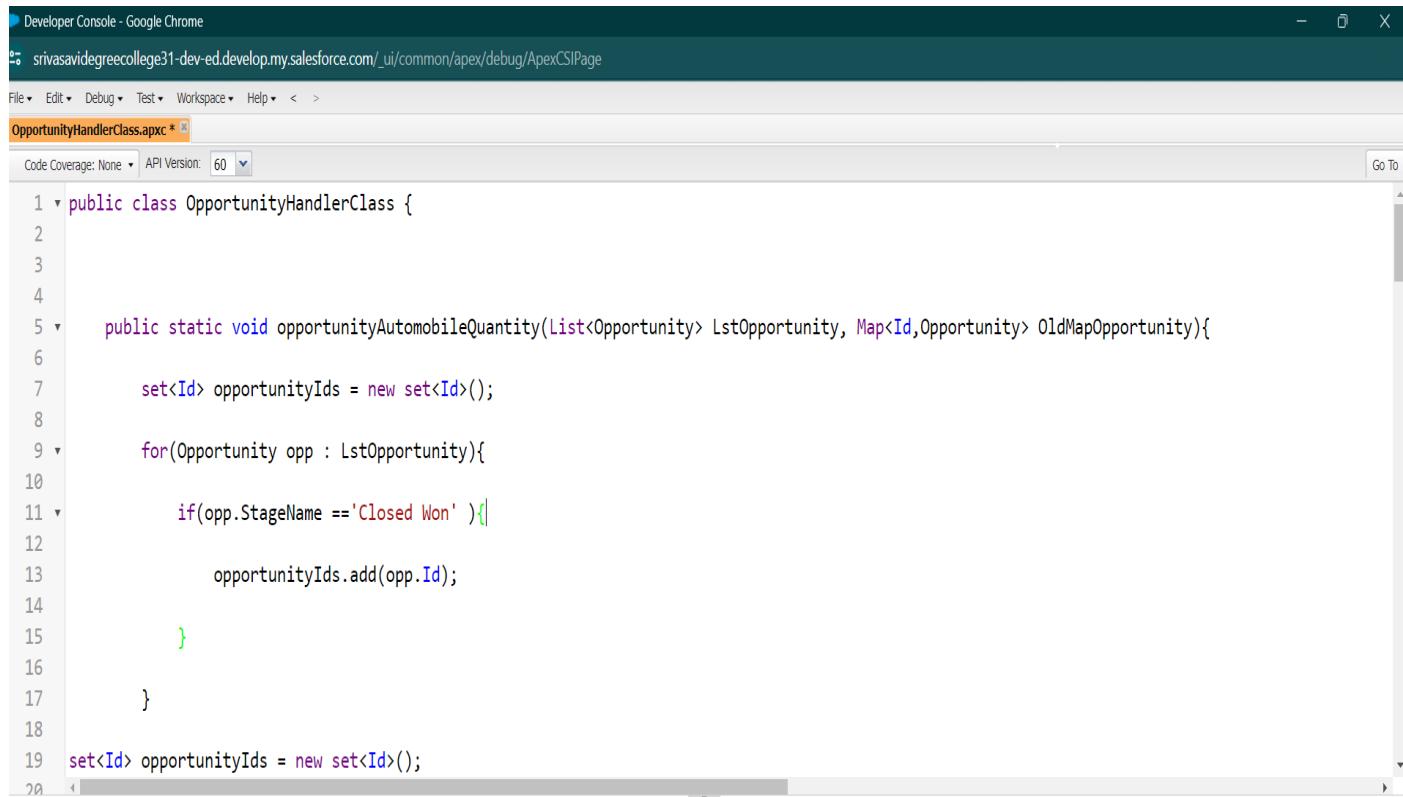
Apex can be invoked by using triggers. Apex triggers enable you to perform custom actions

before or after changes to Salesforce records, such as insertions, updates, or deletions.

For example, you can have a trigger run before an object's records are inserted into the database, after records have been deleted, or even after a record is restored from the Recycle Bin.

You can define triggers for top-level standard objects that support triggers, such as a Contact or an Account, some standard child objects, such as a CaseComment, and custom objects. To define a trigger, from the object management settings for the object whose triggers you want to access, go to Triggers.

Opportunity Automobile Quantity :



The screenshot shows the Salesforce Developer Console interface. The title bar reads "Developer Console - Google Chrome" and the address bar shows the URL "sriwasavidegreecollege31-dev-ed-develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage". The menu bar includes "File", "Edit", "Debug", "Test", "Workspace", "Help", and "Go To". Below the menu is a toolbar with "Code Coverage: None" and "API Version: 60". The main area displays the code for the OpportunityHandlerClass:

```

1 public class OpportunityHandlerClass {
2
3
4
5     public static void opportunityAutomobileQuantity(List<Opportunity> LstOpportunity, Map<Id,Opportunity> OldMapOpportunity){
6
7         set<Id> opportunityIds = new set<Id>();
8
9         for(Opportunity opp : LstOpportunity){
10
11             if(opp.StageName =='Closed Won'){
12
13                 opportunityIds.add(opp.Id);
14
15             }
16
17         }
18
19         set<Id> opportunityIds = new set<Id>();
20

```

```

trigger OpportunityTrigger on Opportunity (before update, After Update) {
    if(trigger.isbefore && trigger.isUpdate){
        OpportunityHandlerClass.opportunityAutomobileQuantity(trigger.new, trigger.oldMap);
    }
}

```

The screenshot shows the Salesforce Developer Console interface. The top navigation bar includes File, Edit, Debug, Test, Workspace, Help, and a Go To button. The API Version is set to 60. The code editor window contains the provided Apex trigger code. Below the code editor is a logs tab with various application and operation logs. The system status bar at the bottom shows the date (17-04-2024), time (21:32), and system information like ENG IN.

Opportunity-Automobile Error :

```

public class OpportunityAutomobileHandler {
    public static void quantityErrorOnAutomobileInformation(List<Opportunity_Automobile__c> lstOpportunityAutomobile){
        Set<Id> AutomobileIds = new Set<Id>();
        For(Opportunity_Automobile__c OppAutomobile : lstOpportunityAutomobile){
            if(OppAutomobile.Automobile__c != null){
                AutomobileIds.add(OppAutomobile.Automobile__c);
            }
        }
        Map<Id, Automobile_Information__c> lstAutomobileInformation = new map<Id, Automobile_Information__c>([SELECT Id, CreatedById, Quantity__c, Pr
        For(Opportunity_Automobile__c OppAutomobile : lstOpportunityAutomobile){
            If(OppAutomobile.Automobile__c == lstAutomobileInformation.get(OppAutomobile.Automobile__c).Id && lstAutomobileInformation.get(OppAutom
            OppAutomobileaddError('the Number of Automobile u want are not Available !! the Automobile are Available Count is ' + lstAutomobil
        }
    }
}

```

This screenshot shows the Salesforce Developer Console with the OpportunityAutomobileHandler class code. The code implements a static method quantityErrorOnAutomobileInformation that processes a list of Opportunity_Automobile__c objects. It uses a set to store automobile IDs and a map to store automobile information. For each object in the list, it checks if the automobile ID is not null and adds it to the set. Then, it iterates through the map and compares the automobile ID with the key. If a match is found, it adds an error message to the automobile object indicating that the number of automobiles wanted is not available. The system status bar at the bottom shows the date (17-04-2024), time (21:32), and system information like ENG IN.

Developer Console - Google Chrome
sivasavidegreecollege31-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >

OpportunityAutoMobileHandler.apxc * [] OpportunityAutoMobileTrigger.apxt *

Code Coverage: None ▾ API Version: 60 ▾ Go To

```

1 trigger OpportunityAutoMobileTrigger on Opportunity_Automobile__c (before insert, before update) {
2
3     if(trigger.isbefore && trigger.isinsert || trigger.isupdate){
4         OpportunityAutomobileHandler.quantityErrorOnAutomobileInformation(trigger.new);
5
6     }
7
8 }
9
10

```

Invoice Creation Trigger :

Developer Console - Google Chrome
sivasavidegreecollege31-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >

OpportunityAutoMobileHandler.apxc * [] OpportunityAutoMobileTrigger.apxt * [] InvoiceCreation.apxc *

Code Coverage: None ▾ API Version: 60 ▾ Go To

```

1 public class InvoiceCreation {
2
3     public static void OpportunityClosedwonInvoiceGeneration(List<Opportunity> lstOpportunity, Map<Id,Opportunity> OldMapOpportunity){
4
5         Set<Id> oppIds = new Set<Id>();
6
7         For(Opportunity opp : lstOpportunity){
8
9             if(Opp.StageName == 'Closed Won' && OldMapOpportunity.get(opp.Id).StageName != opp.StageName){
10
11                 oppIds.add(opp.Id);
12
13             }
14
15         }
16
17         List<Opportunity_Automobile__c> lstOpportunityAutomobile = [SELECT Unit_Price__c, Total_Price__c, Automobile__c, Quantity__c, Opportunity__c
18
19         List<Invoice__c> lstInvoice = new List<Invoice__c>();
20

```

Developer Console - Google Chrome
 sivasavidegreecollege31-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >

OpportunityAutomobileHandler.apxc * OpportunityAutoMobileTrigger.apxt * InvoiceCreation.apxc * OpportunityTrigger.apxt *

Code Coverage: None ▾ API Version: 60 Go To

```

1 trigger OpportunityTrigger on Opportunity (before update, After Update) {
2
3   if(trigger.isbefore && trigger.isUpdate){
4
5     OpportunityHandlerClass.opportunityAutomobileQuantity(trigger.new, trigger.oldMap);
6
7   }
8
9   IF(trigger.isafter && trigger.isupdate){
10
11     InvoiceCreation.OpportunityClosedwonInvoiceGeneration(trigger.new, trigger.oldMap);
12
13   }
14
15 }
16
17

```

Check Contact Role :

Developer Console - Google Chrome
 sivasavidegreecollege31-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >

ContactRoleCheck.apxc *

Code Coverage: None ▾ API Version: 60 Go To

```

5 List<OpportunityContactRole> lstContactRole = [SELECT Id From OpportunityContactRole WHERE OpportunityId IN: OldMapOpportunity.keySet()];
6
7 For(Opportunity opp : lstOpportunity){
8
9   if(Opp.StageName == 'Closed Won' && OldMapOpportunity.get(opp.Id).StageName != opp.StageName){514}
10
11   If(lstContactRole.isEmpty()){
12
13     opp.adderror('Please add contact Role on opportunity whenever Opportunity is Going to Closed Won.');
14
15   }
16
17 }
18
19 }
20
21
22
23

```

Logs Tests Checkpoints Query Editor View State Progress Problems

User	Application	Operation	Time	Status	Read	Size

Filter Click here to filter the log list

Upcoming Earnings Search ENG IN 22:35 17-04-2024

Developer Console - Google Chrome

srivasavidegreecollege31-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >

OpportunityTrigger.apxt *

Code Coverage: None API Version: 60 Go To

```
1 trigger OpportunityTrigger on Opportunity (before update, After Update) {
2
3     if(trigger.isbefore && trigger.isUpdate){
4
5         OpportunityHandlerClass.opportunityAutomobileQuantity(trigger.new, trigger.oldMap);
6
7         ContactRoleCheck.CheckcontactRoleonOpportunity(trigger.new, trigger.oldMap);
8
9     }
10
11    IF(trigger.isafter && trigger.isupdate){
12
13        InvoiceCreation.OpportunityClosedwonInvoiceGeneration(trigger.new, trigger.oldMap);
14
15    }
16
17 }
```

Logs Tests Checkpoints Query Editor View State Progress Problems

User	Application	Operation	Time	Status	Read	Size

Filter Click here to filter the log list

Breaking news Surya Tilak grac...

Search ENG IN 22:41 17-04-2024

8) LWC Component:

Create Apex Class To Get Invoices :

Developer Console - Google Chrome

srivasavidegreecollege31-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File Edit Debug Test Workspace Help < >

OpportunityInvoiceswithLWC.apxc *

Code Coverage: None API Version 60 Go To

```
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  
8 }  
9  
10 }  
11  
12 }  
13  
14 |
```

Logs Tests Checkpoints Query Editor View State Progress Problems

Name Line Problem

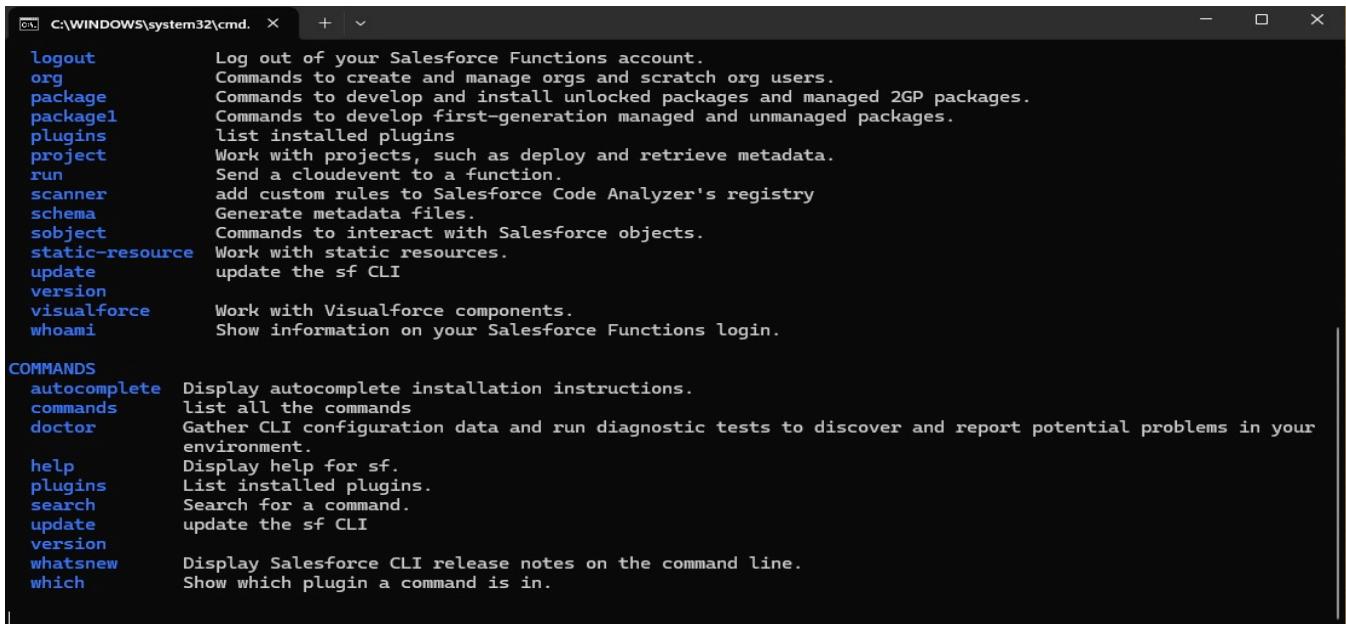
31°C Haze

Search

ENG IN 22:58 17-04-2024

Install Salesforce CLI :

The Salesforce CLI is a powerful command line interface that simplifies development and build automation when working with your Salesforce org.

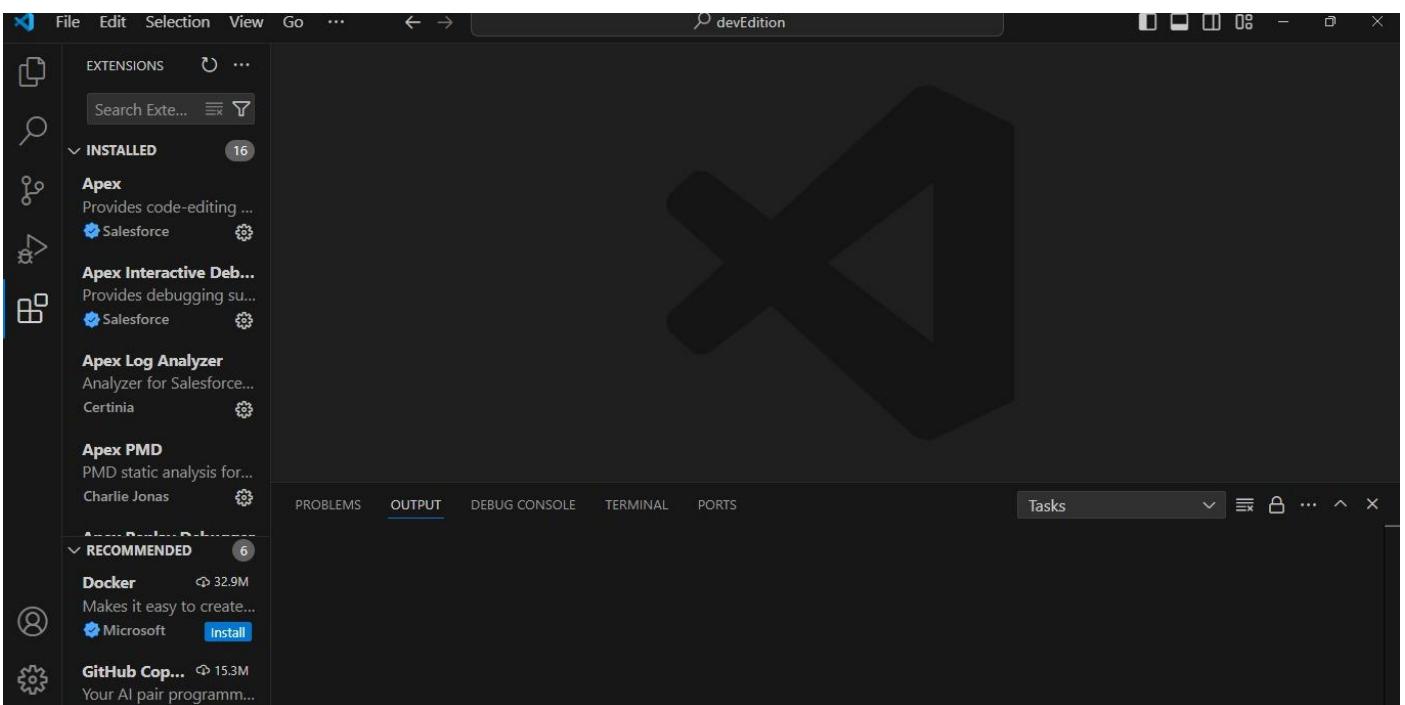


```
C:\WINDOWS\system32\cmd. × + 
logout      Log out of your Salesforce Functions account.
org         Commands to create and manage orgs and scratch org users.
package     Commands to develop and install unlocked packages and managed 2GP packages.
package1    Commands to develop first-generation managed and unmanaged packages.
plugins     list installed plugins
project    Work with projects, such as deploy and retrieve metadata.
run        Send a cloudevent to a function.
scanner    add custom rules to Salesforce Code Analyzer's registry
schema     Generate metadata files.
sobject    Commands to interact with Salesforce objects.
static-resource Work with static resources.
update     update the sf CLI
version    version of the sf CLI
visualforce Work with Visualforce components.
whoami     Show information on your Salesforce Functions login.

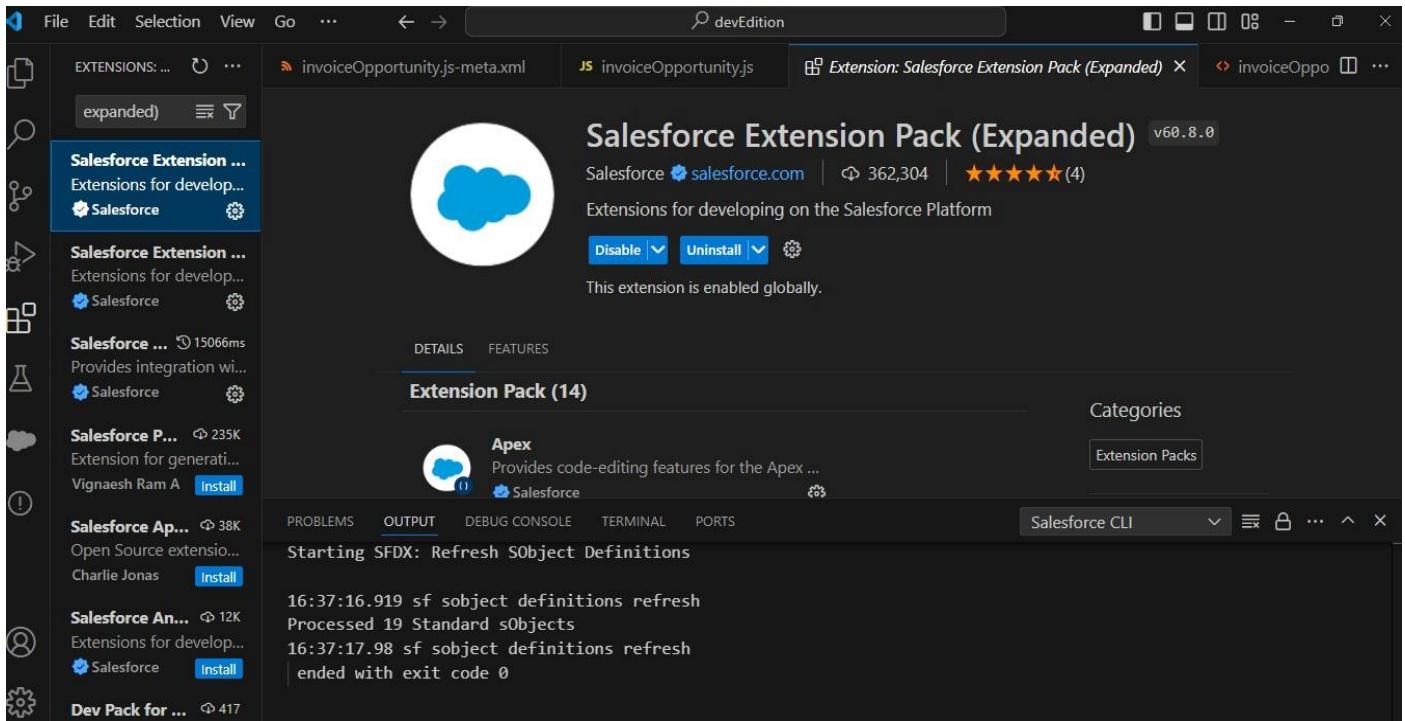
COMMANDS
autocomplete Display autocomplete installation instructions.
commands     list all the commands
doctor       Gather CLI configuration data and run diagnostic tests to discover and report potential problems in your environment.
help        Display help for sf.
plugins     List installed plugins.
search      Search for a command.
update     update the sf CLI
version    version of the sf CLI
whatsnew   Display Salesforce CLI release notes on the command line.
which      Show which plugin a command is in.
```

Install Microsoft VS Code :

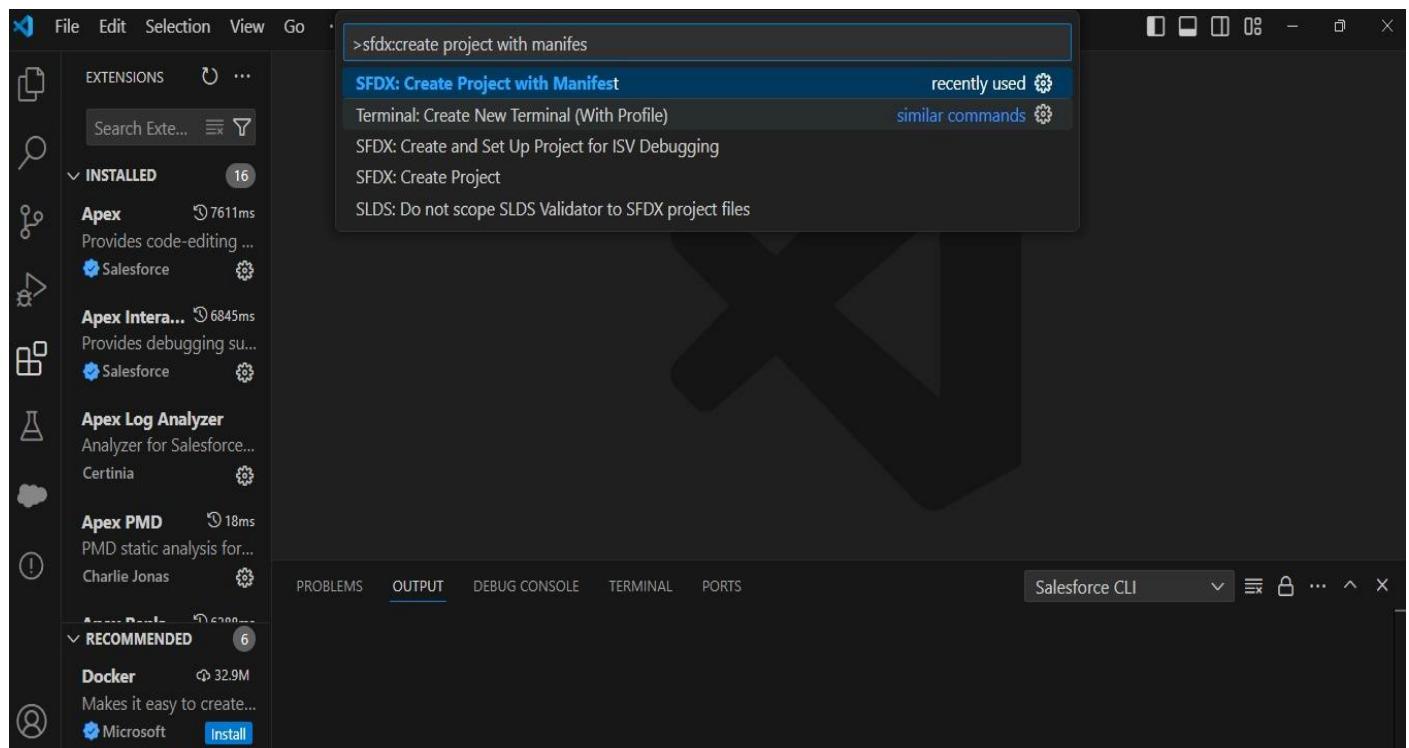
VS Code, or Visual Studio Code, is a free, open-source code editor developed by Microsoft. It is a lightweight, cross-platform code editor that provides features such as debugging, Git integration, and support for a wide range of programming languages.



Install The Salesforce Extension Pack :



Create A Project In VS Code :



Default Package.xml contains various metadata types. I have updated Package.xml as shown below as we deal only with LWC in this article.

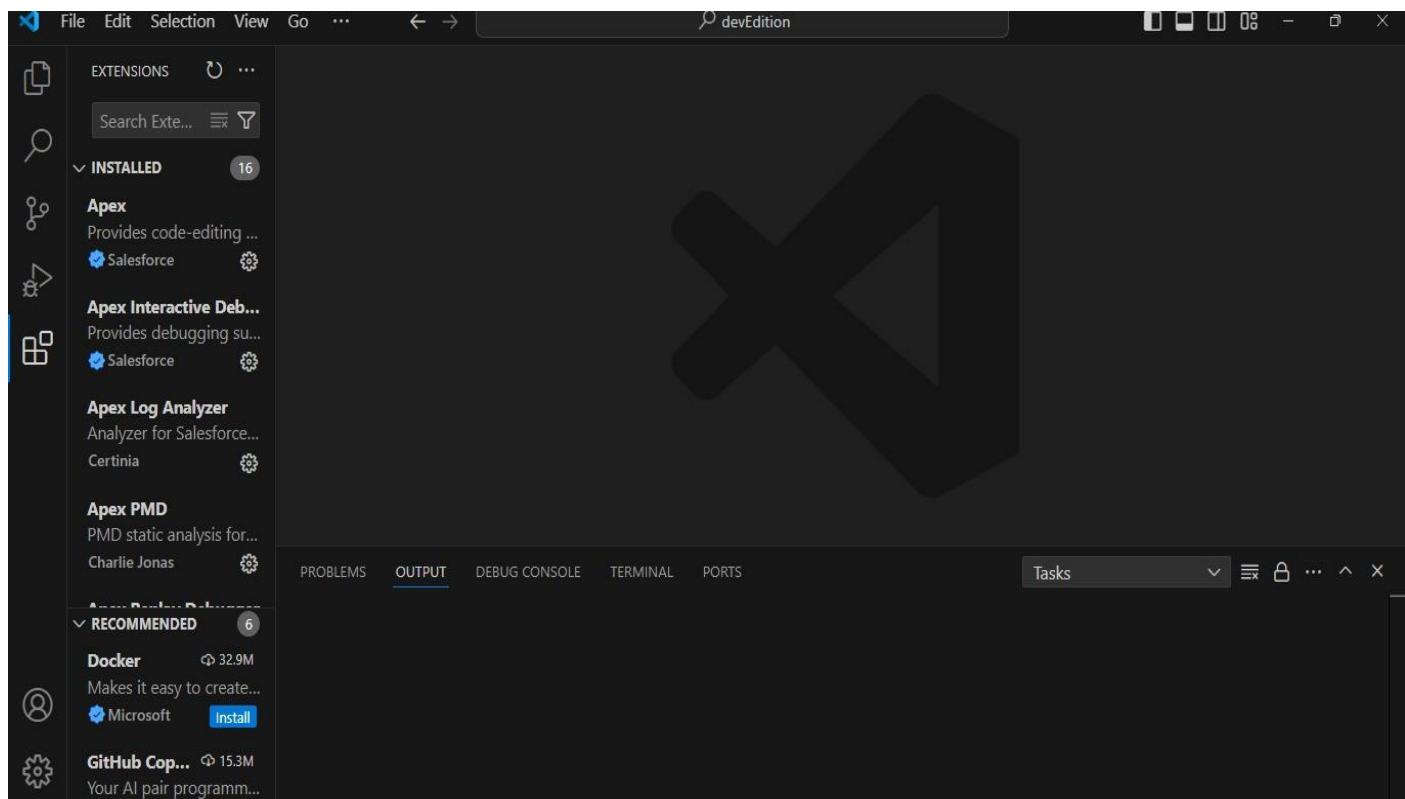
```

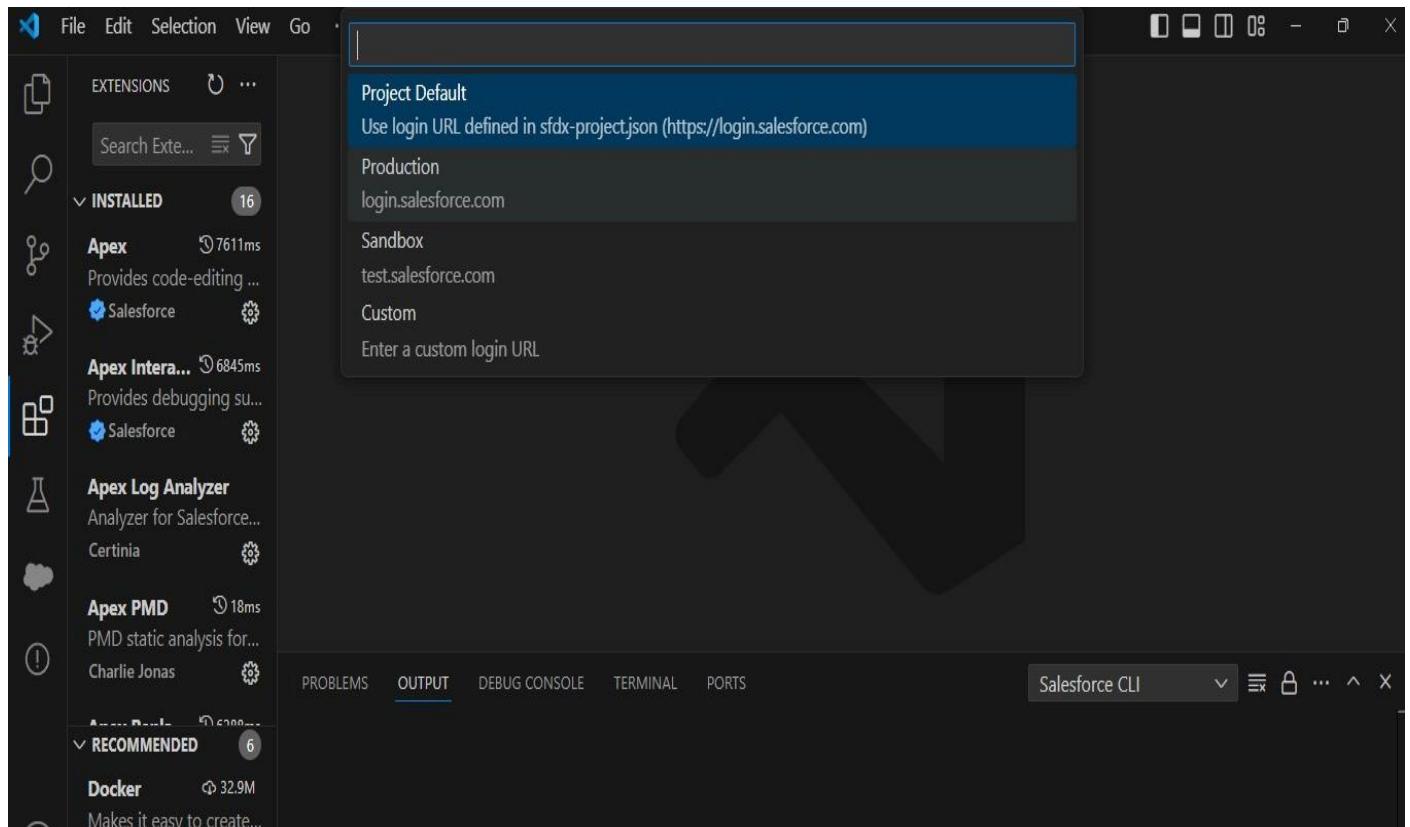
<?xml version="1.0" encoding="UTF-8" standalone="yes"?>
<Package xmlns="http://soap.sforce.com/2006/04/metadata">
<types>
<members*></members>
<name>ApexClass</name>
</types>
<types>
<members*></members>
<name>ApexComponent</name>
</types>
<types>
<members*></members>
<name>ApexPage</name>
</types>
<types>
<members*></members>

```

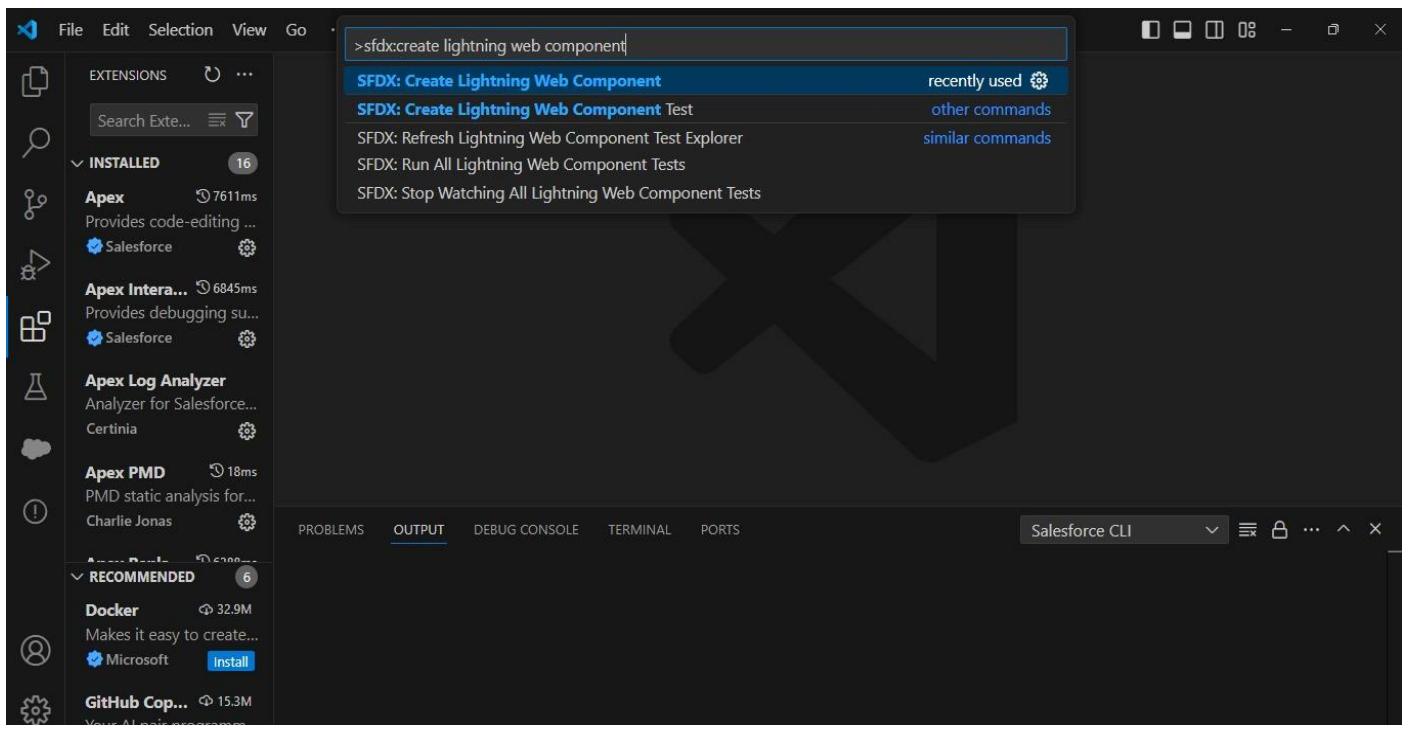
Authorize An Org :

Establish a connection between the local project and the Salesforce instance to retrieve and deploy the components.





Create Lightning Web Component :



```

File Edit Selection View Go invoiceOpportunity.js-meta.xml recently opened
EXPLORER DEVEDITION force-app\main\default\lwc\invoiceOpportunity invoiceOpportunity.js-meta.xml
force-app > main > default > lwc > invoiceOpportunity > invoiceOpportunity.js-meta.xml
1 <?xml version="1.0" encoding="UTF-8"?>
2
3 <LightningComponentBundle xmlns="http://soap.sforce.com/2006/04/metadata">
4   <apiVersion>58.0</apiVersion>
5
6   <isExposed>true</isExposed>
7
8   <targets>
9     <target>lightning_RecordAction</target>
10    <target>lightning_RecordPage</target>
11
12   </targets>
13
14
15
16

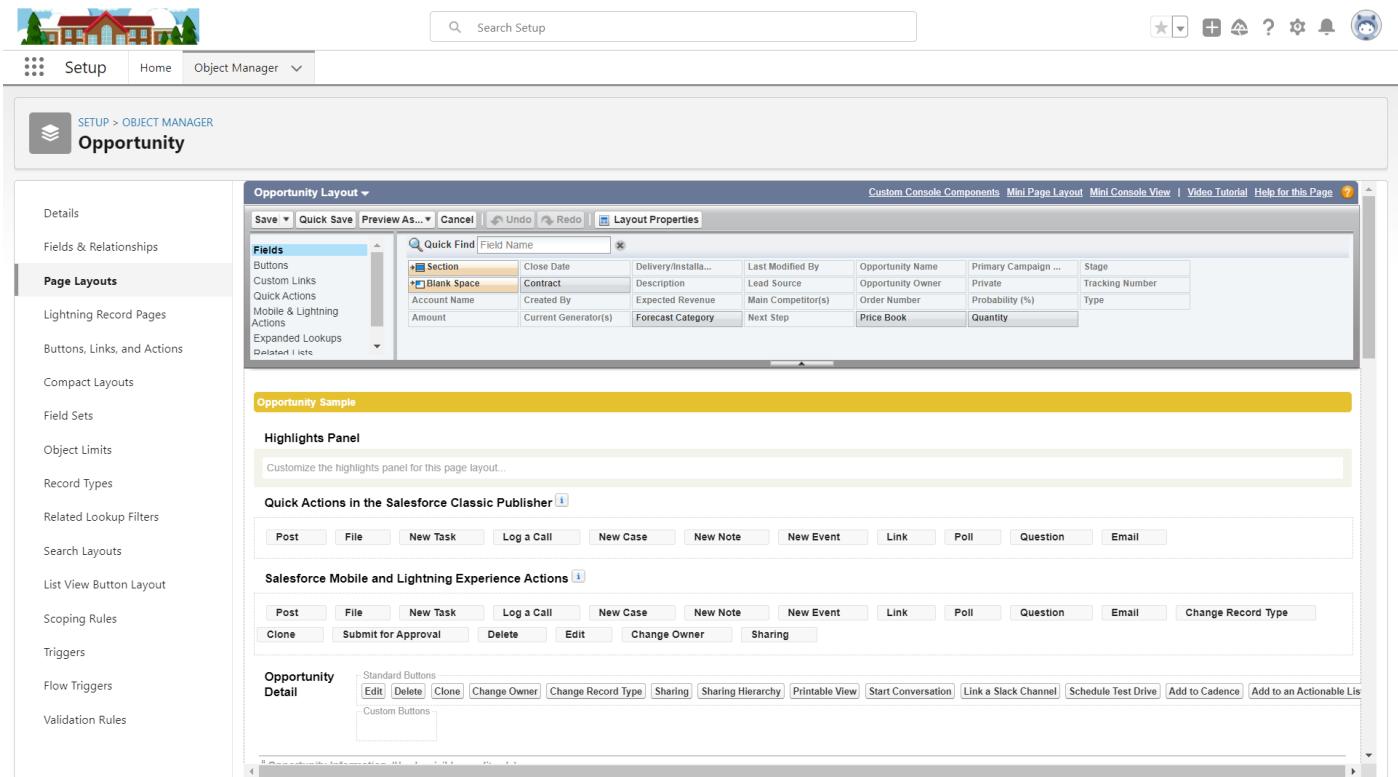
```

PROBLEMS OUTPUT DEBUG CONSOLE TERMINAL PORTS Salesforce CLI

Create Button To Add On Opportunity :

Buttons, Links, and Actions					
14 Items, Sorted by Label					
LABEL	NAME	DESCRIPTION	TYPE	CONTENT SOURCE	OVERRIDDEN
Add to Campaign	AddInfluence			Standard page	<input type="checkbox"/>
Calculate Price	headlessPricingAction			Standard page	<input type="checkbox"/>
Clone	Clone			Standard page	<input type="checkbox"/>
Clone with Related	DeepClone			Standard page	<input type="checkbox"/>
Delete	Delete			Standard page	<input type="checkbox"/>
Delivery Status	DeliveryStatus		Detail Page Link	URL	<input type="checkbox"/>
Edit	Edit			Standard page	<input type="checkbox"/>
Link a Slack Channel	CreateSalesChannel			Standard page	<input type="checkbox"/>
List	List			Standard page	<input type="checkbox"/>
New	New			Standard page	<input type="checkbox"/>
Opportunities Tab	Tab			Standard page	<input type="checkbox"/>

Add Invoice Opportunity Into Opportunity Record Page:



9) Apex Schedulers :

The Apex Scheduler lets you delay execution so that you can run Apex classes at a specified time. This is ideal for daily or weekly maintenance tasks using Batch Apex. To take advantage of the scheduler, write an Apex class that implements the Schedulable interface, and then schedule it for execution on a specific schedule.

```

1 public class DeleteClosedLostOpportunities implements Schedulable{
2
3     public static void execute(SchedulableContext sc){
4
5         List<Opportunity> getLostOpportunities = [SELECT Id, Name From Opportunity Where StageName =: 'Closed Lost' LIMIT 5000];
6
7         if(!getLostOpportunities.IsEmpty()){
8
9             Delete getLostOpportunities;
10        }
11    }
12 }
13
14 }
15 }
```

The screenshot shows the Salesforce Setup interface for editing the Opportunity page layout. The left sidebar lists various setup categories like Details, Fields & Relationships, and Page Layouts. The main area displays the 'Opportunity Layout' configuration screen. It includes a 'Fields' section with a table showing fields like Section, Close Date, Delivery/Installat..., and Stage. Below this are sections for 'Highlights Panel', 'Quick Actions in the Salesforce Classic Publisher', 'Salesforce Mobile and Lightning Experience Actions', and the 'Opportunity Detail' section with standard buttons like Edit, Delete, Clone, and Change Owner.

This screenshot shows the same Opportunity page layout editor from a slightly different perspective or after some changes. The layout structure remains similar, with sections for Fields, Highlights Panel, Quick Actions, and Opportunity Detail. However, the 'Opportunity Detail' section now includes additional buttons such as Submit for Approval, Sharing, and Change Record Type. The bottom of the screen shows a preview of the 'Opportunity Information' section, which contains fields for Opportunity Owner, Account Name, Primary Campaign Source, and other details with sample text values.

10) Reports :

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.

Create Report On Opportunity :

The screenshot shows the Salesforce Opportunities report interface. The report title is "Opportunity Closed Won Report". The table has columns for Account Name, Opportunity Name, Owner Role, Opportunity Owner, Stage, Next Step, Lead Source, and Type. The data includes records for Edge Communications, Pyramid Construction Inc., Dickenson plc, Grand Hotels & Resorts Ltd, Grand Hotels & Resorts Ltd, United Oil & Gas Corp., United Oil & Gas Corp., United Oil & Gas Corp., Express Logistics and Transport, Express Logistics SLA, University of Arizona, and GenePoint. The report also includes a sidebar with filters for Account Name, Opportunity Name, Owner Role, Opportunity Owner, Stage, Next Step, Lead Source, and Type, and a preview message: "Previewing a limited number of records. Run the report to see everything."

Account Name	Opportunity Name	Owner Role	Opportunity Owner	Stage	Next Step	Lead Source	Type
Edge Communications	Edge Emergency Generator	-	Akasapu Vijaya Lakshmi	Id. Decision Makers	-	-	Existing Customer - Replacement
Pyramid Construction Inc.	Pyramid Emergency Generators	-	Akasapu Vijaya Lakshmi	Prospecting	-	Phone Inquiry	-
Dickenson plc	Dickenson Mobile Generators	-	Akasapu Vijaya Lakshmi	Qualification	-	Purchased List	New Customer
Grand Hotels & Resorts Ltd	Grand Hotels Kitchen Generator	-	Akasapu Vijaya Lakshmi	Id. Decision Makers	-	-	Existing Customer - Upgrade
Grand Hotels & Resorts Ltd	Grand Hotels Guest Portable Generators	-	Akasapu Vijaya Lakshmi	Value Proposition	-	Employee Referral	Existing Customer - Upgrade
United Oil & Gas Corp.	United Oil Refinery Generators	-	Akasapu Vijaya Lakshmi	Proposal/Price Quote	-	-	Existing Customer - Upgrade
United Oil & Gas Corp.	United Oil Office Portable Generators	-	Akasapu Vijaya Lakshmi	Negotiation/Review	-	-	Existing Customer - Upgrade
United Oil & Gas Corp.	United Oil Installations	-	Akasapu Vijaya Lakshmi	Needs Analysis	-	-	Existing Customer - Upgrade
United Oil & Gas Corp.	United Oil Plant Standby Generators	-	Akasapu Vijaya Lakshmi	Value Proposition	-	External Referral	Existing Customer - Upgrade
Express Logistics and Transport	Express Logistics Portable Truck Generators	-	Akasapu Vijaya Lakshmi	Perception Analysis	-	External Referral	Existing Customer - Upgrade
Express Logistics SLA	Express Logistics SLA	-	Akasapu Vijaya Lakshmi	Proposal/Price Quote	-	Employee Referral	Existing Customer - Upgrade
University of Arizona	University of AZ Installations	-	Akasapu Vijaya Lakshmi	Id. Decision Makers	-	-	-
GenePoint	GenePoint Lab Generators	-	Akasapu Vijaya Lakshmi	-	-	-	-

Create Report On Automobile Information :

The screenshot shows the Salesforce Automobile Information report interface. The report title is "Automobile Information Report". The table has columns for Name Of Manufacturer, Model, Built date, Total Number of Cylinders, Colour, Quantity, Price, and VIN. The data includes records for Toyota, Ford, Subaru, Hyundai, Nissan, Audi, Mercedes-Benz, BMW, and Chevrolet. The report also includes a sidebar with filters for Name Of Manufacturer, Model, Built date, Total Number of Cylinders, Colour, Quantity, Price, and VIN, and a preview message: "Previewing a limited number of records. Run the report to see everything."

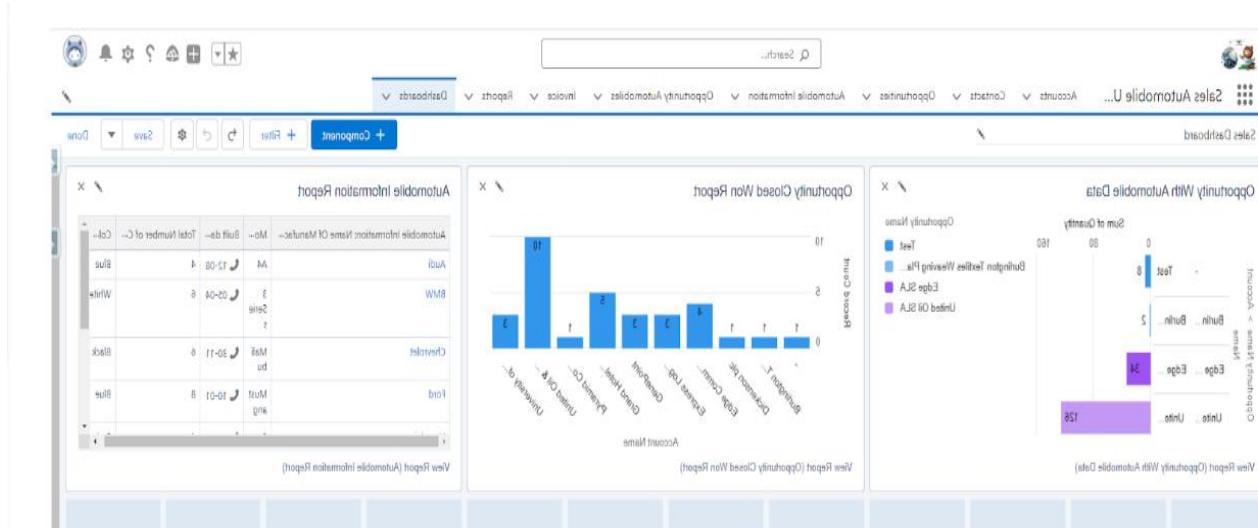
Name Of Manufacturer	Model	Built date	Total Number of Cylinders	Colour	Quantity	Price	VIN
Toyota	Corolla	15-05-2022	4	Red	12	₹20,000	IHCQM82633A004352
Ford	Mustang	10-01-2023	8	Blue	54	₹35,000	2C3CDZAG4KH123456
Subaru	Outback	14-10-2023	6	Green	56	₹30,000	5J8TF2H51EL123456
Hyundai	Sonata	08-06-2022	4	Red	78	₹26,000	1G1YY320355123456
Nissan	Altima	25-02-2023	4	Silver	77	₹24,000	2T2HA31U45C123456
Audi	A4	12-08-2022	4	Blue	9	₹33,000	1GNEK13R7XJ123456
Mercedes-Benz	C-Class	18-09-2023	4	Gray	24	₹38,000	JN1B1CPK74K123456
BMW	3 Series	05-04-2023	6	White	116	₹42,000	WA1VAAF74KD123456
Chevrolet	Malibu	30-11-2022	6	Black	33	₹28,000	5YJ3E1EA3KF123456
					459	₹276,000	

11) 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 :

As an Admin for the organization you keep pushing yourself to reach out the business requirements to take the organization to peak heights and all your superiors are very much impressed with your efforts and work dedication. In addition with reports you make an ease for the CEO in viewing the reports with data visualization. So he doesn't have to search for the data he wants during the meetings.



DEMO LINK :

https://drive.google.com/file/d/1V6EI7uRMsL7E3T8yo4HkaP_-foAtQCE5/view?usp=drivesdk