Project Title: Salesforce Automobiles using Salesforce CRM

College Name: **MAILAM ENGINEERING COLLEGE**

Code: **4216**

Department of Computer Science and Engineering

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Project Objective:

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.

Introduction:

Salesforce is a powerful Customer Relationship Management (CRM) platform that can be leveraged by companies in various industries, including the automotive sector. For automobile dealerships, manufacturers, and service providers, Salesforce offers a suite of tools that can streamline operations, improve customer engagement, and drive sales. Salesforce CRM is a cloud-based platform that helps businesses manage their customer relationships. It provides a 360-degree view of the customer, allowing businesses to track interactions, manage leads, optimize sales processes, and deliver personalized customer experiences. Salesforce can be customized to meet the specific needs of different industries, including the automobile industry.

Scope:

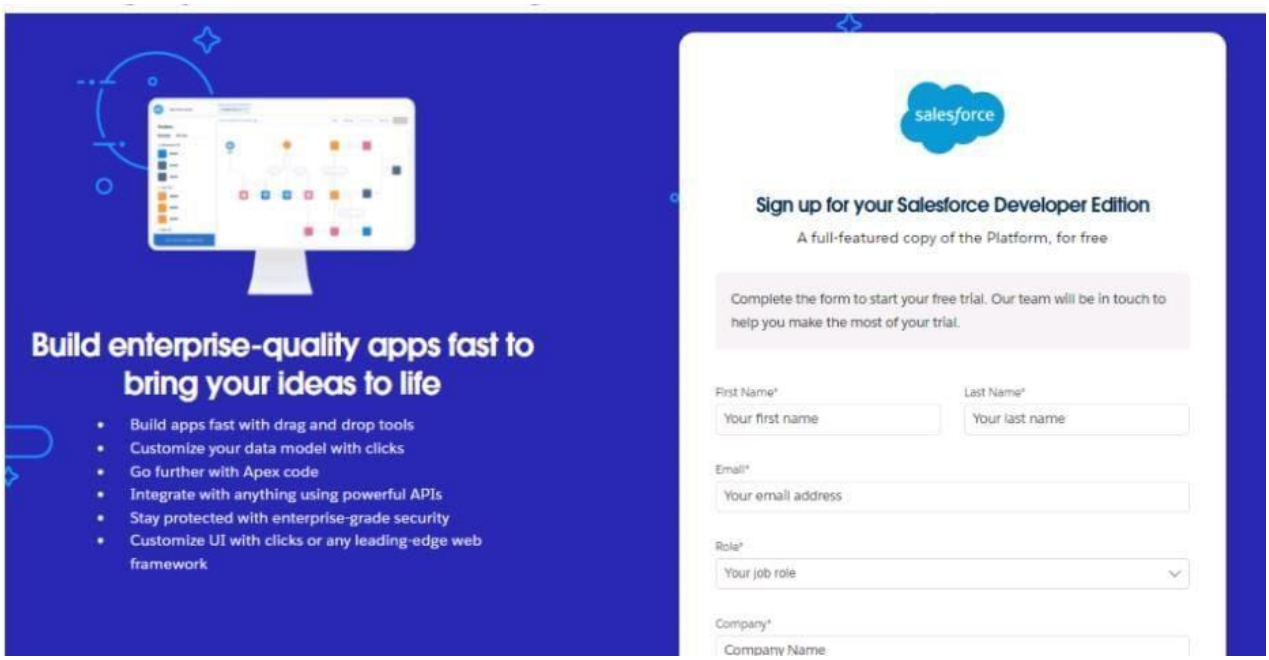
Deploy Salesforce Sales Cloud for managing leads, opportunities, and accounts. Use Salesforce Service Cloud for customer support and after-sales service. Implement Salesforce Marketing Cloud for automating customer engagement and promotions. Customize Salesforce to suit specific needs of the automobile sales and service processes.

Create Developer Account:

Creating a developer org in salesforce.

Go to https://developer.salesforce.com/signup

On the sign up form, enter the following details :



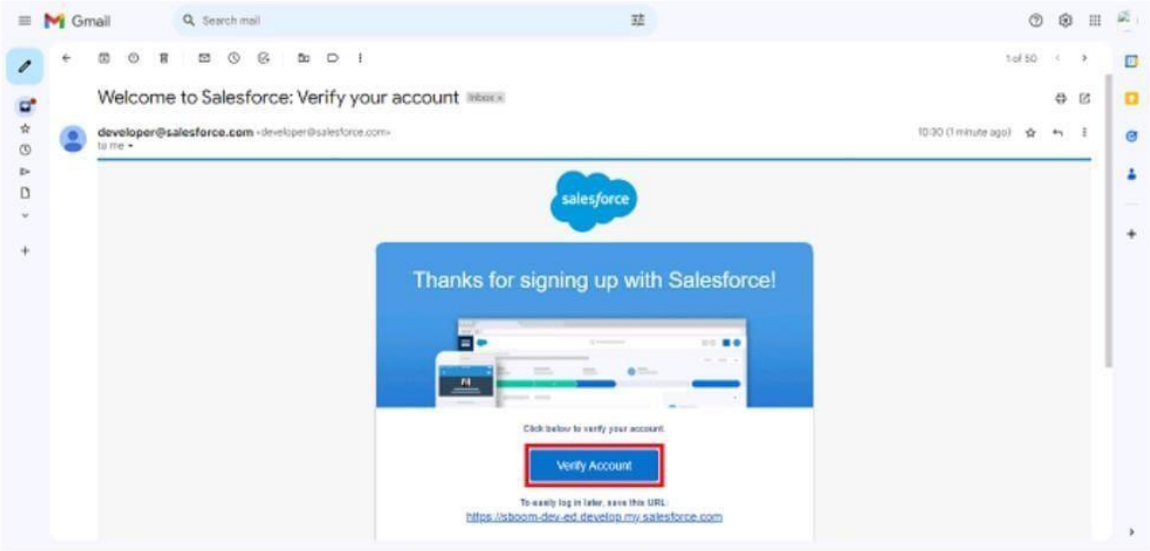
1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

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

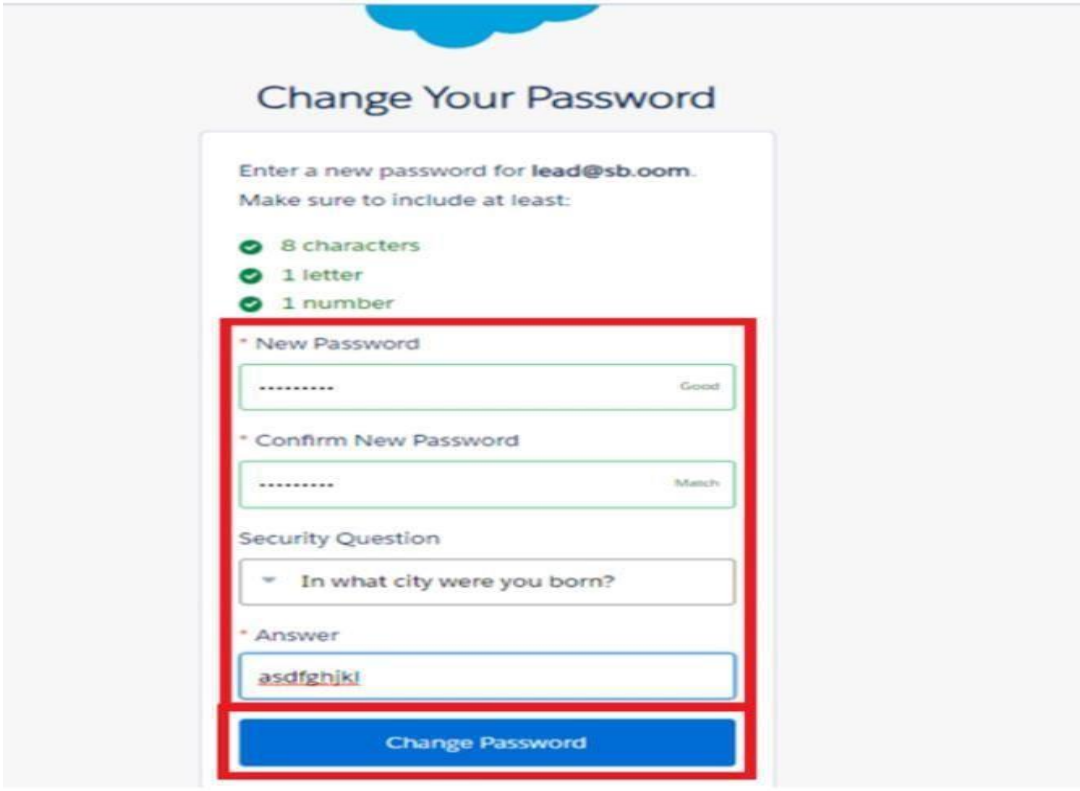
Account Activation :

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



2. Click on Verify Account

3. Give a password and answer a security question and click on change password.



4.Then you will redirect to your salesforce setup page.

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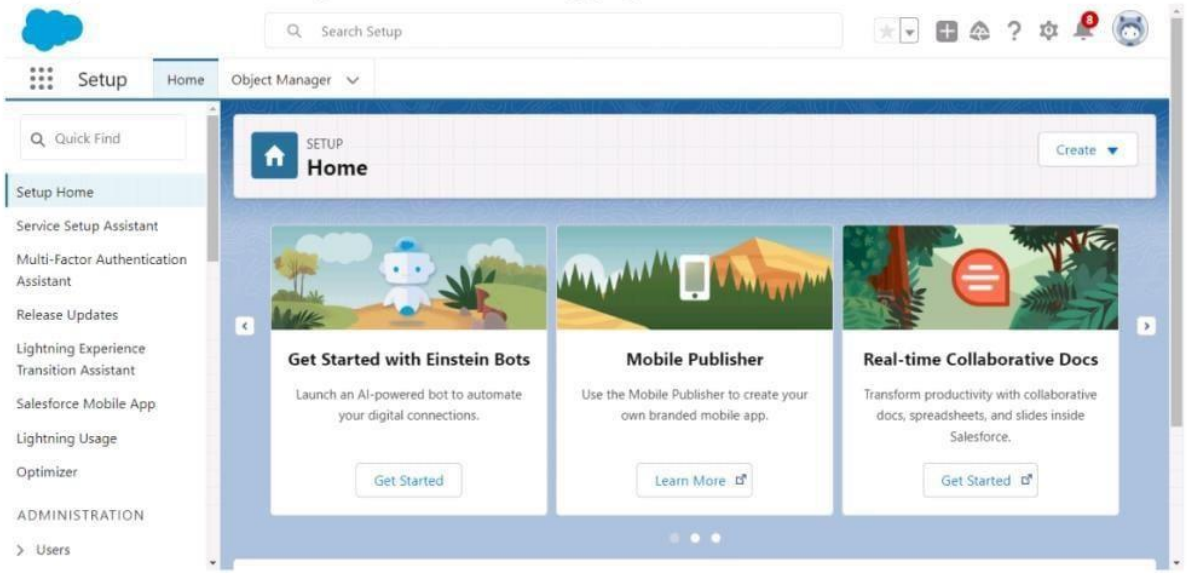


Object:

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:

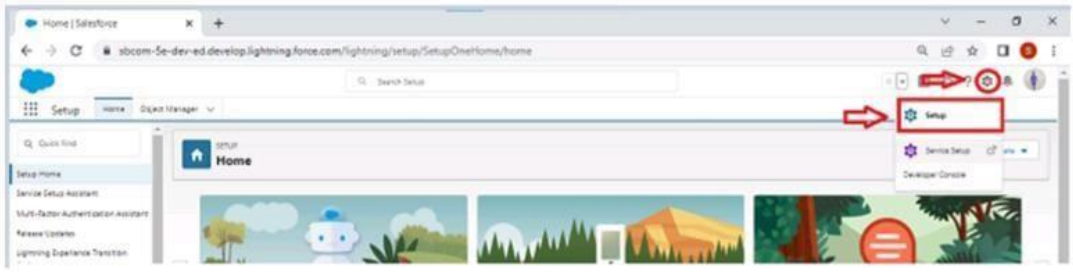
Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.

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.

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.

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.

Fields & 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.

Types of Fields

1. Standard Fields
2. Custom Fields

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.

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:

1.insert
2.update
3.delete
4.merge

5.upsert
6.undelete

There are primarily two types of Apex Triggers:

Before Trigger:

This type of trigger in Salesforce is used either to update or validate the values of a record before they can be saved into the database. So, basically, the before trigger validates the record first and then saves it. Some criteria or code can be set to check data before it gets ready to be inserted into the database.

After Trigger:

This type of trigger in Salesforce is used to access the field values set by the system and affect any change in the record. In other words, the after trigger makes changes to the value from the data inserted in some other record

LWC Component:

1. Create Apex Class to Get Invoices
2. Install Salesforce CLI
3. Install Microsoft VS Code Install the Salesforce
4. Extension Packing Crate a project in VS Code
5. Authorize an org
6. Create Lightning Web Component

7. Create Button to Add on Opportunity
8. Add InvoiceOpportunity into Opportunity Record Page **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.

Schedulable Apex Syntax :

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

 }
```

}

Reports :

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

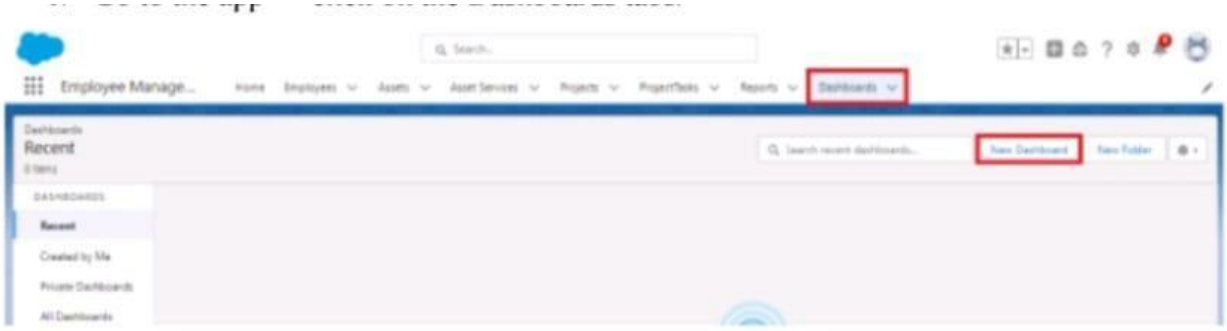
Dashboard:

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.

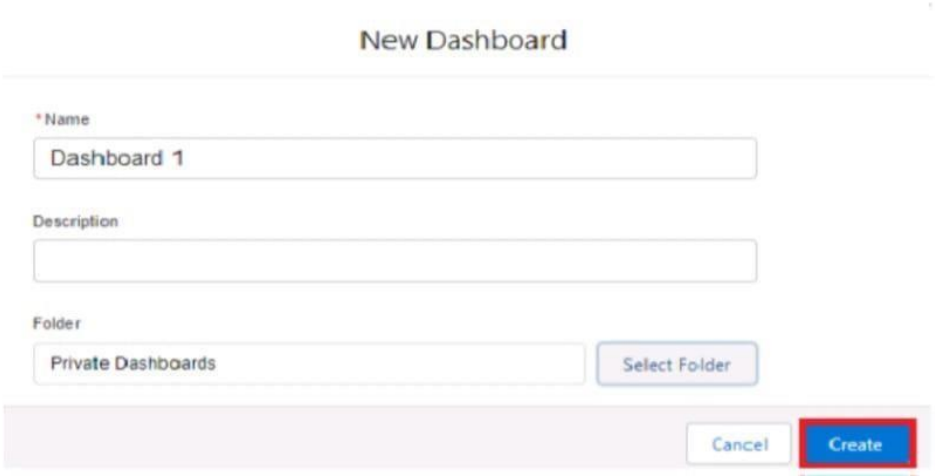
Sales Dashboard:

Create Dashboard

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

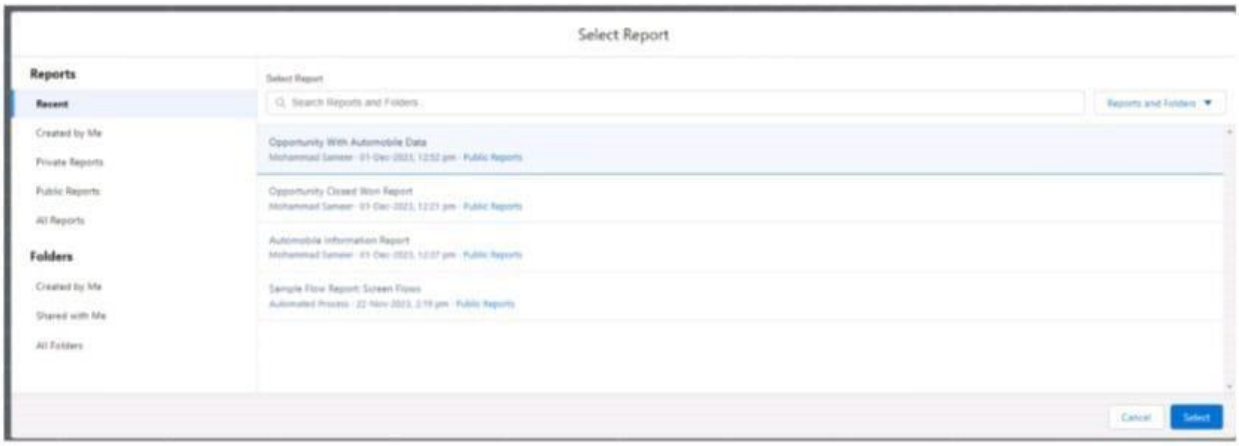


2.Give a Name and click on Create.



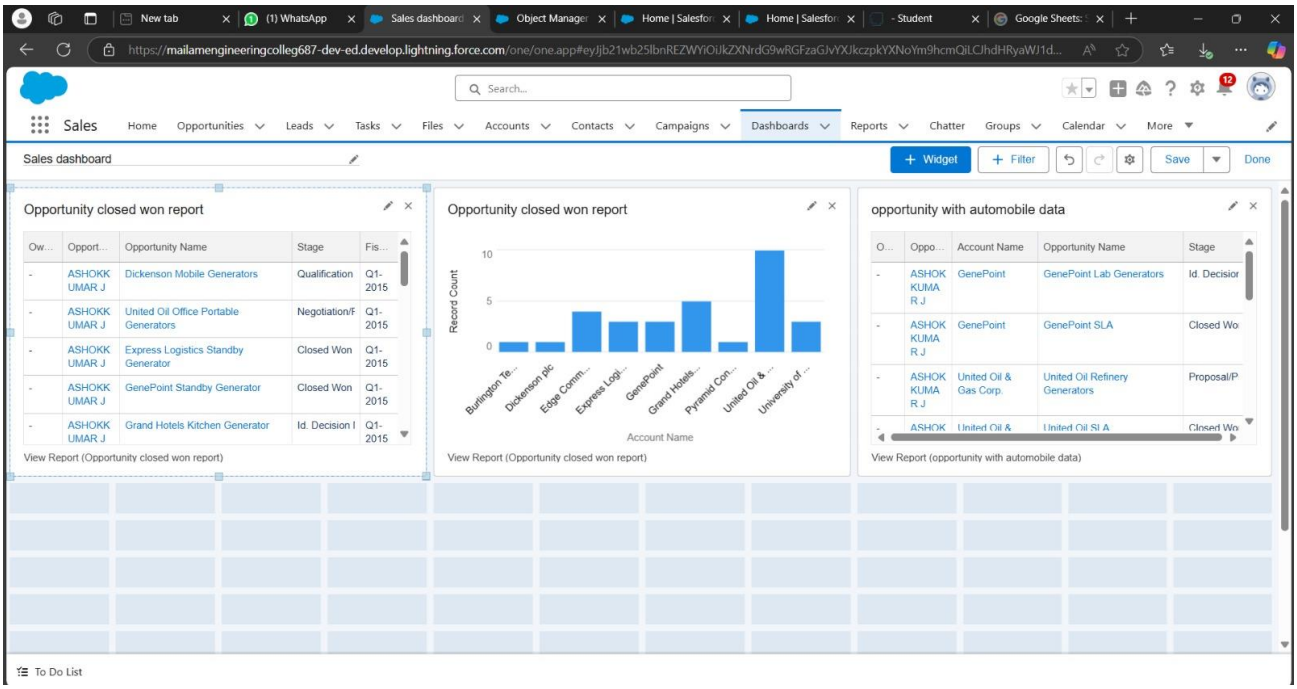
Name : Automobile Sales

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.