

**CSI COLLEGE OF ENGINEERING**  
**NAAN MUDHALVAN PROJECT**  
**COLLEGE CODE - 7106**

**Sales Automobile Using Salesforce CRM**

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# **Sales Automobile Using Salesforce CRM**

## **User Story:**

Salesforce CRM for automobile sales enhances efficiency and customer satisfaction by streamlining lead management, automating follow-ups, and enabling personalized marketing through customer profiling. It integrates inventory management for real-time updates on vehicles and marketing tools for seamless communication and lead nurturing. With insightful analytics, it identifies sales trends, forecasts demand, and supports data-driven decisions, optimizing operations, fostering customer relationships, and boosting revenue growth in the automotive industry.

## **Objective:**

To enhance the sales operations of the automobile industry by implementing Salesforce CRM, enabling improved lead management, customer engagement, and data-driven decision-making.

## **Project Flow:**

Milestone 1 : Salesforce developer account creation

Milestone 2 : Object

Milestone 3 : Tabs

Milestone 4: The Lightning app

Milestone 5 : Fields and Relationships

Milestone 6 : Page Layout

Milestone 7 : Apex Trigger

Milestone 8 : LWC Component

Milestone 9: Apex Schedulers

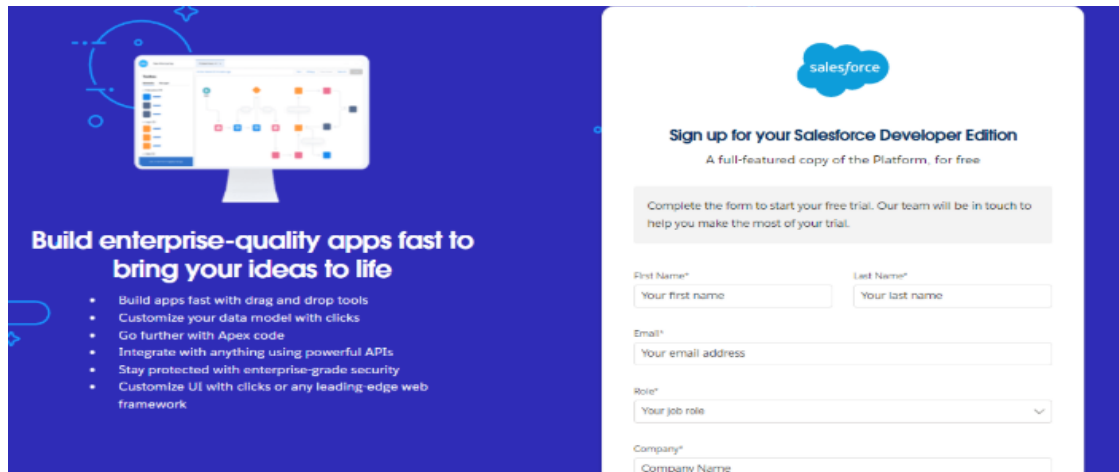
Milestone 10: Reports

Milestone 11: Dashboards

## **Milestone 1- Salesforce developer account creation:**

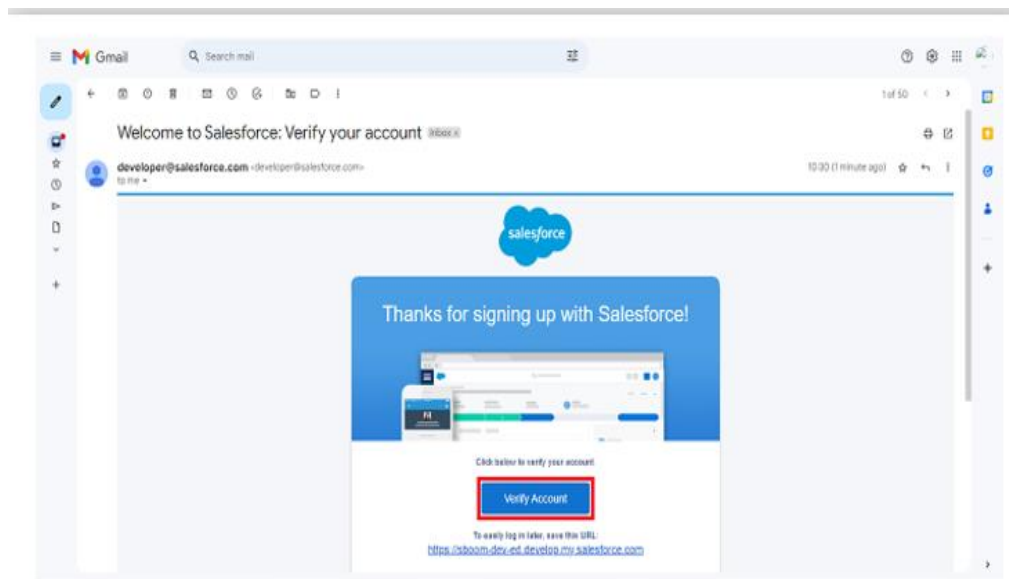
### **Activity 1: Creating Developers Account:**

- Open Salesforce Developer Signup and provide your first name, last name, email, and select Role: Developer.
- Enter details such as your Company (College Name), Country: India, Postal Code, and create a Username in the format username@organization.com (e.g., yourname@collegename.com).
- Click Sign Me Up to finish the signup process.



## Activity 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. 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.



## Milestone 2- Create Object :

### Activity 1: Create Automobile Information Object

1. Download the spreadsheet, save it as AutomobileInformation.csv, and ensure the file name is "Automobile Information" in CSV format.
2. Log into your Salesforce account, click Setup, and navigate to the Object Manager tab.

3. Click Create, select Custom Object from Spreadsheet, and log in using your Salesforce credentials created earlier.
4. Click Upload, choose the AutomobileInformation.csv file, and let Salesforce auto-detect the fields and populate the record data. Verify the field types and select the appropriate Record Name field.
5. Click Next, adjust the settings as required, and then click Finish to create the Automobile Information object and import the data successfully.



Define object and fields  
Choose the data source, map fields and their types, and import field data.

CSV File Details

Encoding Format:  | Values Separated By:  | Field Label Source: ☐ Enter manually ☒ Detect from row | Field Label Row:  | Import Rows of Data: ☒ No, skip import ☐ Yes, import data

Record Name Field:

Fields 9 of 9 to import | ☐ Hide mapped fields

IMPORT FILE FIELD NAME	Salesforce FIELD NAME	Salesforce FIELD TYPE	ADD TO LAYOUTS	FIELD PREVIEW
✓ Name Of Manufacturer	Name Of Manufacturer	Text	<input checked="" type="checkbox"/>	Toyota
✓ Model	Model	Text	<input checked="" type="checkbox"/>	Corolla
✓ Engine Number	Engine Number	Text	<input checked="" type="checkbox"/>	ABC12345
✓ VIN	VIN	Text	<input checked="" type="checkbox"/>	1HGCM82633A004352
✓ Total Number of Cylinders	Total Number of Cylinders	Picklist	<input checked="" type="checkbox"/>	4
✓ Colour	Colour	Picklist	<input checked="" type="checkbox"/>	Red
✓ Built date	Built date	Phone	<input checked="" type="checkbox"/>	15-05-2022
✓ Price	Price	Currency	<input checked="" type="checkbox"/>	520
✓ Quantity	Quantity	Integer	<input checked="" type="checkbox"/>	12

Back Next

## Activity 2: Create Invoice Object

Define object and fields

Choose the data source, map fields and their types, and import field data.

CSV File Details

Encoding Format:  Values Separated By:  Field Label Source: ☒ Enter manually ☐ Detect from row Field Labels Row:  Import Rows of Data: ☒ No, Skip Import ☐ Yes, Import Data

Record Name Field:

Fields 5 of 5 to import ☐ Hide mapped fields

IMPORT FILE FIELD NAME	Salesforce Field Name	Salesforce Field Type	ADD TO LAYOUTS	FIELD PREVIEW
✓ Invoice ID	Invoice ID	Text	<input checked="" type="checkbox"/>	
✓ Total Price	Total Price	Integer	<input checked="" type="checkbox"/>	
✓ Quantity	Quantity	Integer	<input checked="" type="checkbox"/>	
✓ Unit Price	Unit Price	Integer	<input checked="" type="checkbox"/>	
✓ Purchase Date	Purchase Date	Date	<input checked="" type="checkbox"/>	

## Activity 3-Create Automobile Object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
2. Enter the label name>> Opportunity Automobile
3. Plural label name>>Opportunity Automobiles
4. Enter Record Name Label and Format
  - Record Name >> Opportunity Automobile Id
  - Data Type >> Auto Number
  - Display Format >> OA-{0000}
  - Starting Number >> 1
5. Click on Allow reports.
6. Allow search
7. Save.

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label:  Example: Account

Plural Label:  Example: Accounts

Starts with vowel sound: ☐

The Object Name is used when referencing the object via the API.

Object Name:  Example: Account

Description:

Context-Sensitive Help Setting: ☒ Open the standard Salesforce.com Help & Training window ☐ Open a window using a Visualforce page

Content Name:

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number".

Record Name:  Example: Account Name

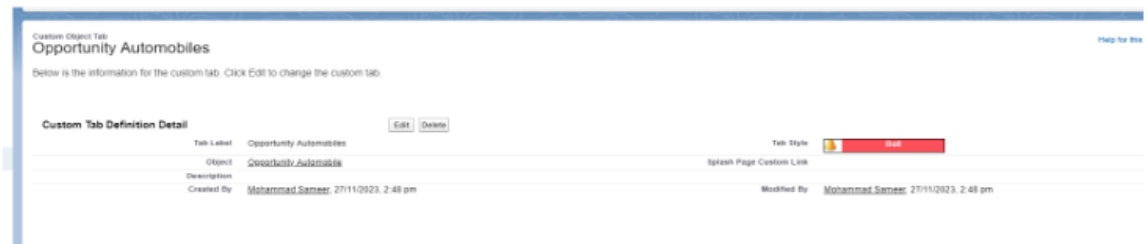
Data Type:

Display Format:  Example: A-{0000} What Is This?

Starting Number:

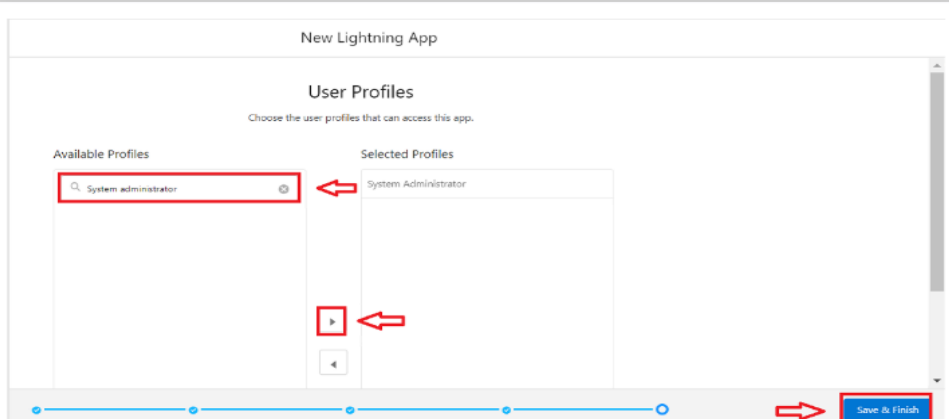
### Milestone 3- Creating customer tab:

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.



### Milestone 4- Create a 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. Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.



## Milestone 5- Fields and Relationships:

### Activity 1: Creating Opportunity Master Detail Relationship Field in Opportunity Automobile Object

1. Go to setup >> click on Object Manager >> type object name(Opportunity Automobile) in quick find bar>> click on the object
2. Now click on “Fields & Relationships” >> New
3. Click on Next
4. 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. Enter the label and name for the lookup field

Field Label: Opportunity  
Field Name: Opportunity  
Description:  
Help Text:  
Child Relationship Name: Opportunity\_Automobiles  
Sharing Settings:  
☐ 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 Reporting: ☐ (Used records can be required to enter parent records when 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. [Go to Filter Settings](#)  
Previous Next Cancel

### Activity 2 : Creating the AutoMobile Information Lookup Field in Opportunity Automobile Object

1. Fill the above as following:
  - Field Label: Automobile
  - Field Name : Automobile
2. Click on Next >> Next>> Save and new.

### Activity 5- Creating Quantity Number Field in Opportunity Automobile Object:

1. Go to setup >> click on Object Manager >> type object name(Opportunity Automobile) in quick find bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select Data type as “Number” and click Next.
  - Field Label >> Quantity
  - Field Name >> Quantity

### Activity 6- Creating Formula Field in Opportunity Automobile Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Opportunity Automobile) in quick find bar >> click on the object.
  - Now click on “Fields & Relationships” >> New.
  - Select Data type as “Formula” and click Next.



- Give Field Label and Field Name as “Unit Price” and select formula return type as “Currency” and change the decimal values to two and click next.

Opportunity Automobile  
New Custom Field

Step 2: Choose output type

Field Label:  Field Name:

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

Formula Return Type

☒ Currency

Decimal Places:  Example: \$10.00

Next

## Activity 7- Creating the Formula field in Opportunity Automobile Object

To create fields in an object:

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

- Now click on “Fields & Relationships” >> New.
- Select Data type as “Formula” and click Next.
- Give Field Label and Field Name as “Total Price” and select formula return type as “Currency” and change the decimal values to two and click next.

Opportunity Automobile  
New Custom Field

Step 2: Choose output type

Field Label:  Field Name:

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

Formula Return Type

☒ Currency

Decimal Places:  Example: \$10.00

Next

## Activity 8- Updating field in Invoice Object

1. Go to setup ? click on Object Manager ? type object name(Invoice) in quick find bar? click on the object.
2. Now click on “Fields & Relationships” , Click on the edit of Invoice Id field.
3. Select Data type as “Auto Number” and click Next.

SETUP > OBJECT MANAGER  
Invoice

Field  
Invoice ID

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" referenced via the API.

Record Name: Invoice ID  
Example: Account Name

Data Type: Auto Number

Display Format: 1-(0000)  
Example: A-(0000) What is This?

Starting Number: 1

Save Cancel

Account Name	City
Acme	New York
Global Media	Toronto
salesforce.com	San Francisco

## Milestone 6-Page Layout

### Activity 1- Edit the Page layout for Opportunity Object

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

Step 2: Click on Page Layouts, Click on ‘Opportunity Layouts’.

Step 3: check the Required box for Account name and click on Ok.

Step 4: Click on Save.

Field Properties

Account Name

Read-Only ☐

Required ☒

OK Cancel

Amount	Expected Revenue	Close Date	Next Step
₹123.45	₹123.45	29/11/2023	Sample Text



```

Quantity__c, Unit_Price__c, Total_Price__c FROM Opportunity_Automobile__c Where
Opportunity__c IN: opportunityIds]);

    set<Id> AutoInformationIds = new set<Id>();

    for(Opportunity_Automobile__c OppAuto: lstOpportunityAutomobile.values()){
        if(OppAuto.Automobile__c != null){
            AutoInformationIds.add(OppAuto.Automobile__c);
        }
    }

    List<Automobile_Information__c> lstAutomobileInfomation = new
    List<Automobile_Information__c>();

    Map<Id,Automobile_Information__c> MapAutomobileInformation = New
    Map<Id,Automobile_Information__c>([SELECT Quantity__c, Price__c, Name, Id FROM
    Automobile_Information__c WHERE Id IN: AutoInformationIds]);

    For(Opportunity_Automobile__c AutoOpp : lstOpportunityAutomobile.Values()){
        decimal num = 0;

        if(AutoOpp.Automobile__c ==
        MapAutomobileInformation.get(AutoOpp.Automobile__c).Id &&
        OldMapOpportunity.get(AutoOpp.Opportunity__c).stagename != 'Closed Won'){

            num = MapAutomobileInformation.get(AutoOpp.Automobile__c).Quantity__c-
            AutoOpp.Quantity__c;

            MapAutomobileInformation.get(AutoOpp.Automobile__c).quantity__c = num;

        }

        lstAutomobileInfomation.add(MapAutomobileInformation.get(AutoOpp.Automobile__c));
    }
}

If(!lstAutomobileInfomation.IsEmpty()){
    update lstAutomobileInfomation;
}
}
}

```

### Trigger for Opportunity Object.

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

### 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, Price__c  
FROM Automobile_Information__c WHERE Id IN: AutomobileIds]);  
        For(Opportunity_Automobile__c OppAutomobile : lstOpportunityAutomobile){  
            If(OppAutomobile.Automobile__c ==  
lstAutomobileInformation.get(OppAutomobile.Automobile__c).Id &&  
lstAutomobileInformation.get(OppAutomobile.Automobile__c).Quantity__c <  
OppAutomobile.Quantity__c){  
                OppAutomobile.addError('the Number of Automobile u want are not Available !!  
the Automobile are Available Count is ' +  
lstAutomobileInformation.get(OppAutomobile.Automobile__c).Quantity__c );  
            }  
        }  
    }  
}
```

```

    }

}

Trigger handler for the Opportunity_Automobile__c Object

trigger OpportunityAutoMobileTrigger on Opportunity_Automobile__c (before insert, before
Update) {

    if(trigger.isbefore && trigger.isinsert || trigger.isupdate){

        OpportunityAutomobileHandler.quantityErrorOnAutomobileInformation(trigger.new);

    }

}

```

### **Invoice Creation Trigger**

```

public class InvoiceCreation {

    public static void OpportunityClosedwonInvoiceGeneration(List<Opportunity>
lstOpportunity, Map<Id,Opportunity>OldMapOpportunity){

        set<Id> oppIds = new Set<Id>();

        For(Opportunity opp : lstOpportunity){

            if(Opp.StageName == 'Closed Won' &&
OldMapOpportunity.get(opp.Id).StageName != opp.StageName){

                oppIds.add(opp.Id);

            }

        }

        List<Opportunity_Automobile__c> lstOpportunityAutomobile = [SELECT
Unit_Price__c, Total_Price__c, Automobile__c, Quantity__c,Opportunity__c, Id FROM
Opportunity_Automobile__c WHERE Opportunity__c IN: oppIds];

        List<Invoice__c> lstInvoice = new List<Invoice__c>();

        For(Opportunity_Automobile__c oppAuto : lstOpportunityAutomobile){

            Invoice__c i = new Invoice__c();

            i.Quantity__c = oppAuto.Quantity__c;

            i.Unit_Price__c = oppAuto.Unit_Price__c;

            i.Total_Price__c = oppAuto.Total_Price__c;

```

```

        i.Purchase_Date__c = date.today();

        i.Opportunity__c = oppAuto.Opportunity__c;

        lstInvoice.add(i);
    }
    if(!lstInvoice.isEmpty()){
        insert lstInvoice;
    }
}
}

```

### **Trigger:**

```

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

```

### **check contact role**

#### **Trigger:**

```

public class ContactRoleCheck {

    public static void CheckcontactRoleonOpportunity(List<Opportunity> lstOpportunity,
Map<Id,Opportunity>OldMapOpportunity){

        List<OpportunityContactRole> lstContactRole = [SELECT Id From
OpportunityContactRole WHERE OpportunityId IN: OldMapOpportunity.keySet()];

        For(Opportunity opp : lstOpportunity){

            if(opp.StageName == 'Closed Won' &&
OldMapOpportunity.get(opp.Id).StageName != opp.StageName){

```





## Milestone 8- LWC Components

### Activity 1-Create Apex Class to Get Invoices

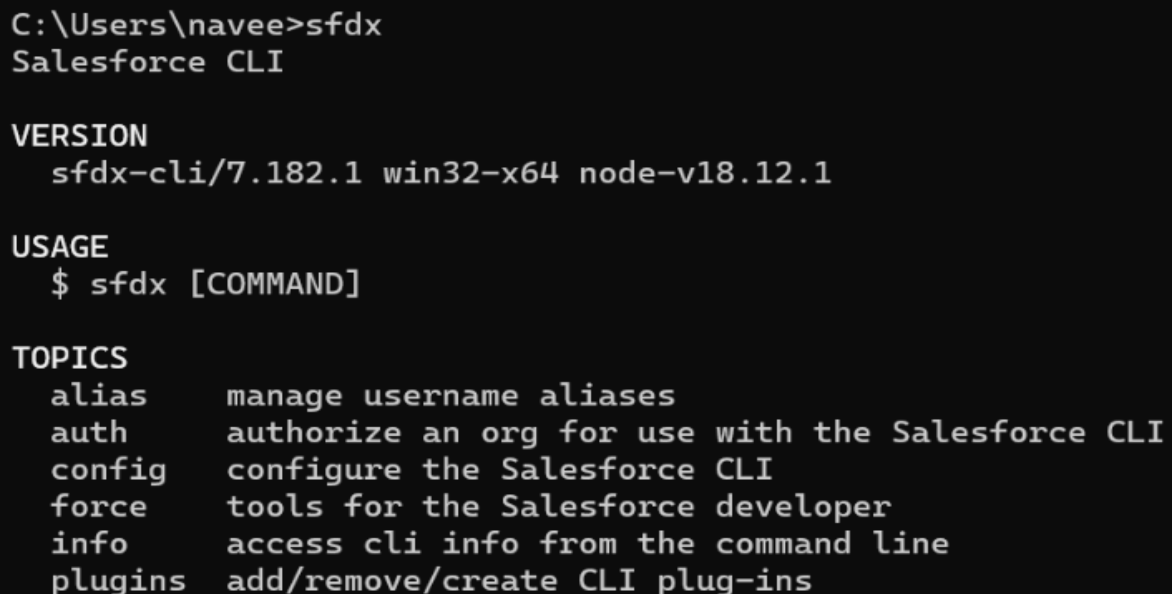
```
public class OpportunityInvoiceswithLWC {  
  
    @AuraEnabled(cacheable=true)  
  
    public static List<Invoice__c> getInvoices(string OpportunityId){  
  
        return [SELECT Id, Quantity__c, Purchase_Date__c, Opportunity__c, Unit_Price__c,  
Total_Price__c, Name FROM Invoice__c WHERE Opportunity__c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

### Activity 2- Install Salesforce CLI

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

Download and install Salesforce CLI

To confirm that the Salesforce CLI is installed and working correctly, you can open a command prompt and type sfdx. This will display the version number of the Salesforce CLI that is currently installed on your system.

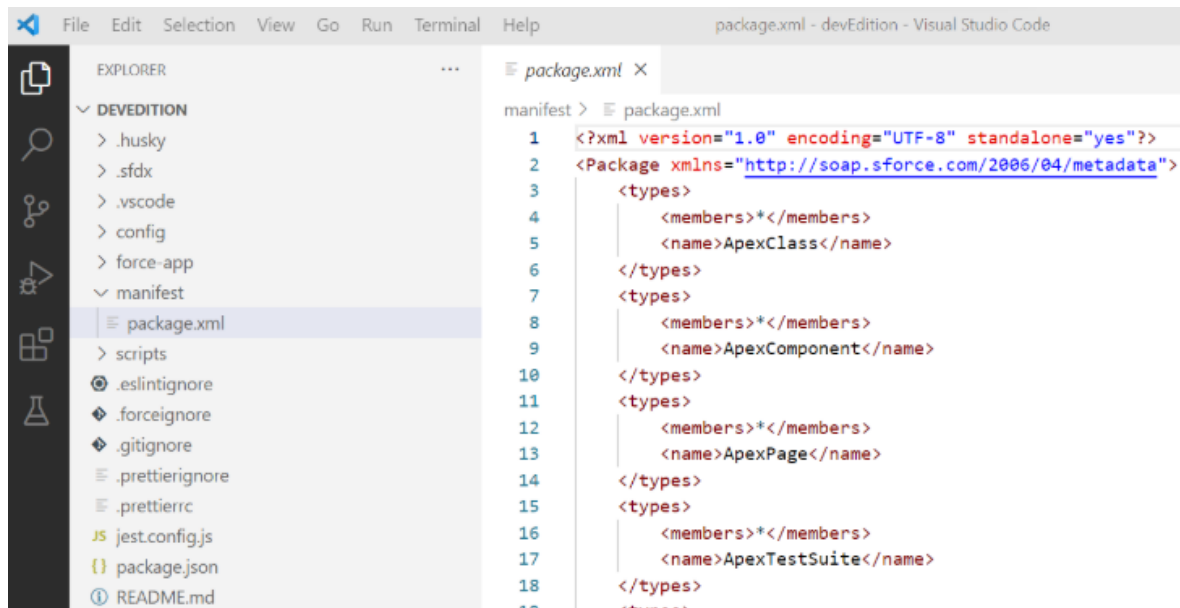


```
C:\Users\namee>sfdx  
Salesforce CLI  
  
VERSION  
sfdx-cli/7.182.1 win32-x64 node-v18.12.1  
  
USAGE  
$ sfdx [COMMAND]  
  
TOPICS  
alias      manage username aliases  
auth       authorize an org for use with the Salesforce CLI  
config     configure the Salesforce CLI  
force      tools for the Salesforce developer  
info       access cli info from the command line  
plugins    add/remove/create CLI plug-ins
```

### Activity 3- Create a project in VS Code

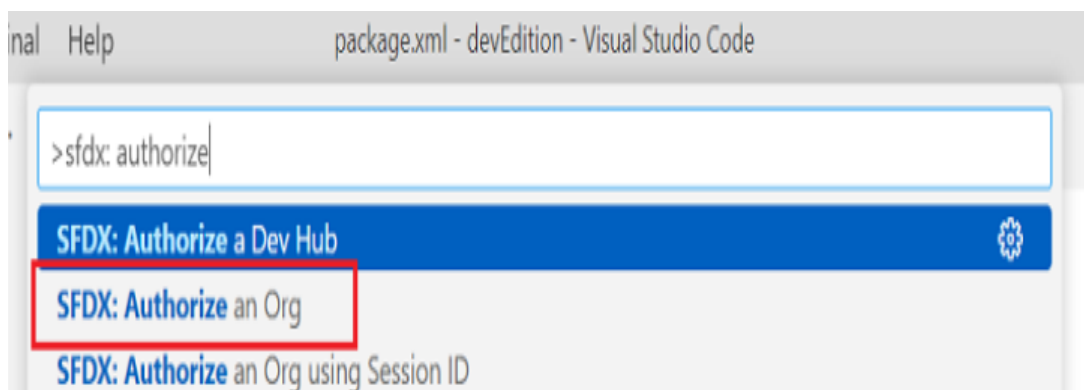
1. Press CTRL + SHIFT + P, type sfdx: create

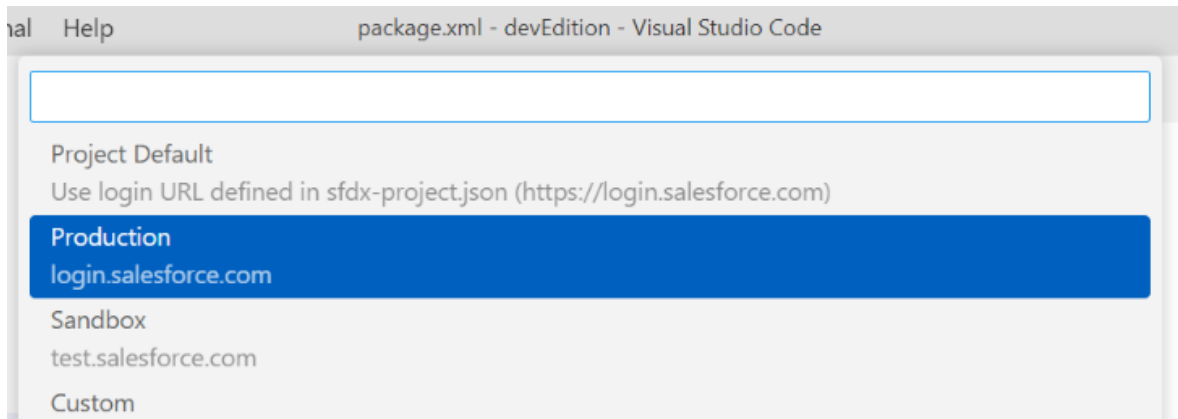
2. select SFDX: Create Project with Manifest
3. Select the Standard project template
4. The new project is created with package.xml



#### Activity 5- Authorize an org

1. Press CTRL + SHIFT + P, type sfdx: authorize.
2. select SFDX: Authorize an Org from the list
3. Choose your Salesforce instance.
4. The Salesforce login page opens in the browser.
5. Enter the credentials and click Log In



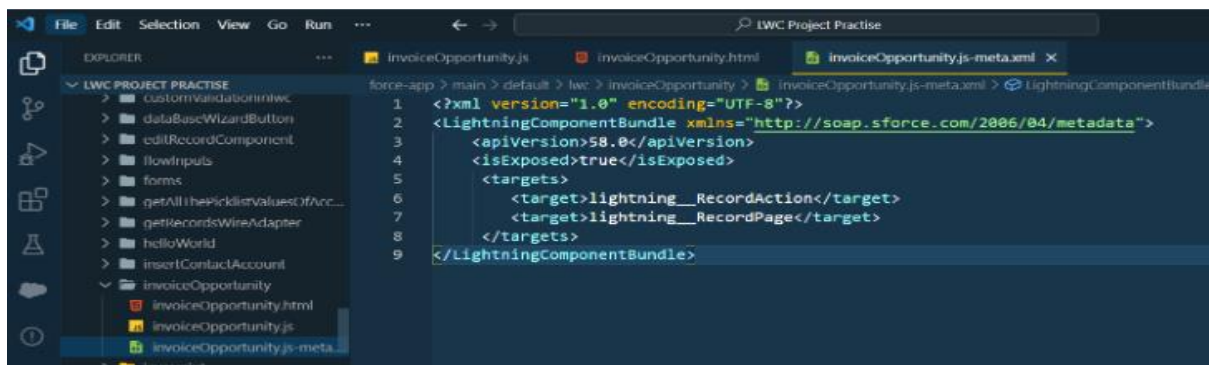


## Activity 6- Create Lightning Web Component

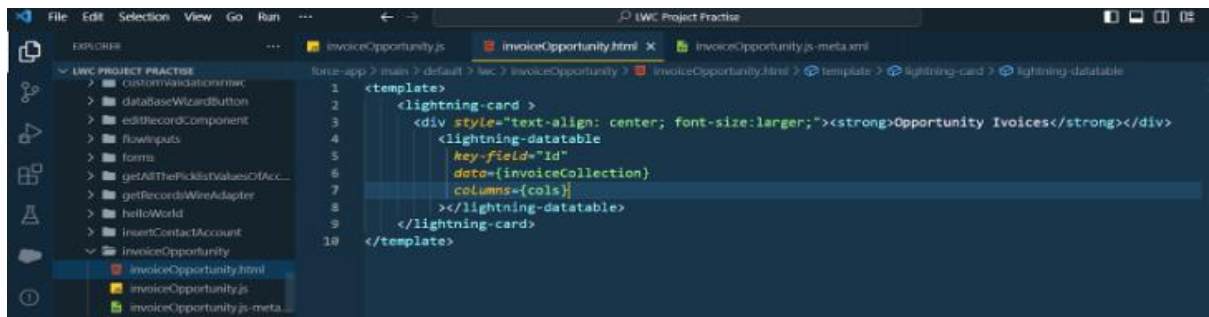
### XML File :

1. In the VS Code, press CTRL + SHIFT + P, type sfdx: create lightning in the search bar, and select SFDX: Create Lightning Web Component
2. Give the name “InvoiceOpportunity” and press Enter.
3. Choose the directory.
4. LWC is created successfully.

### JS File :



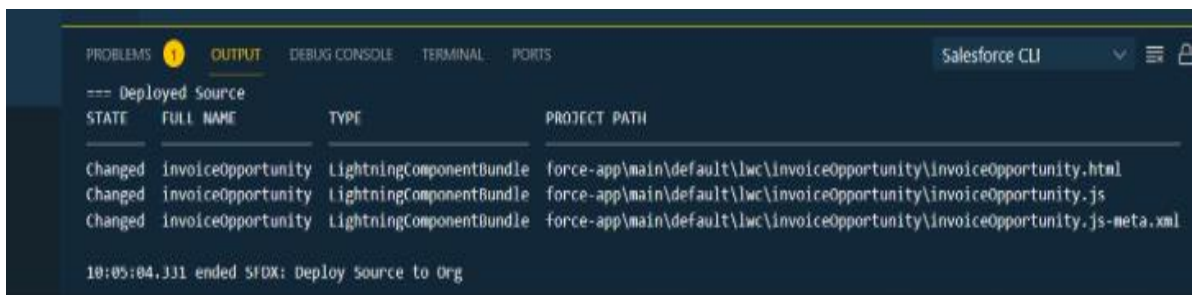
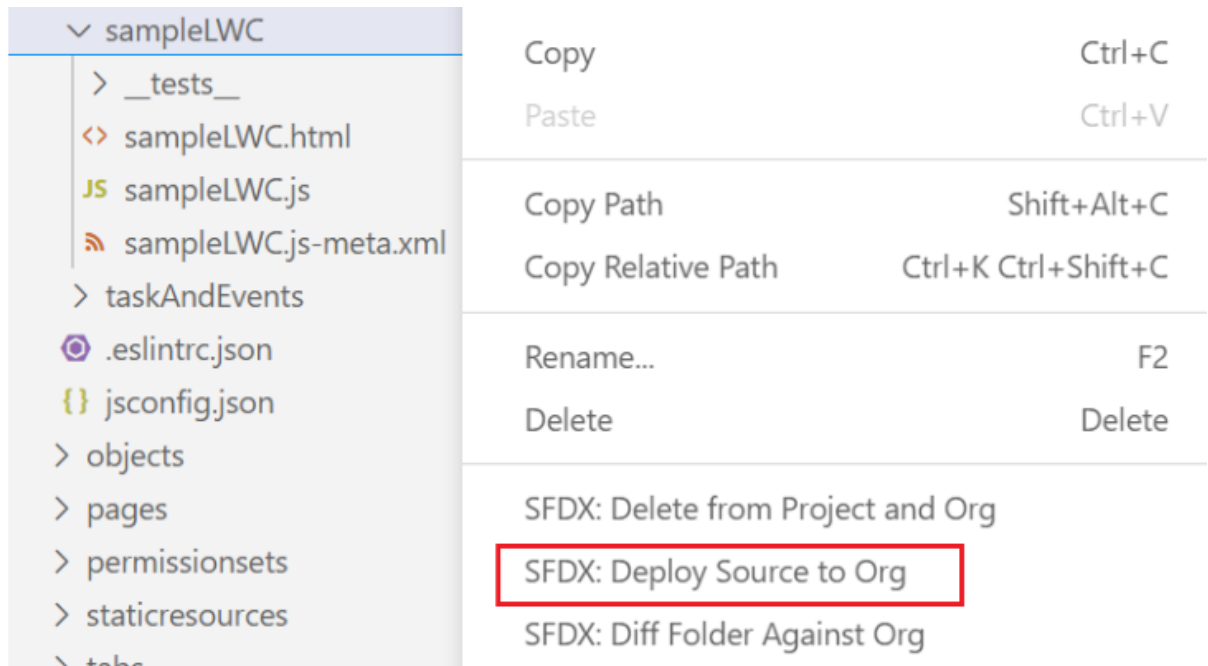
### HTML File :



### Deploy Component:

1. Right-click on the component folder, and select SFDX: Deploy Source to Org to deploy the component to the org.

- Once the deployment is complete, you will see the below-highlighted message in the output tab



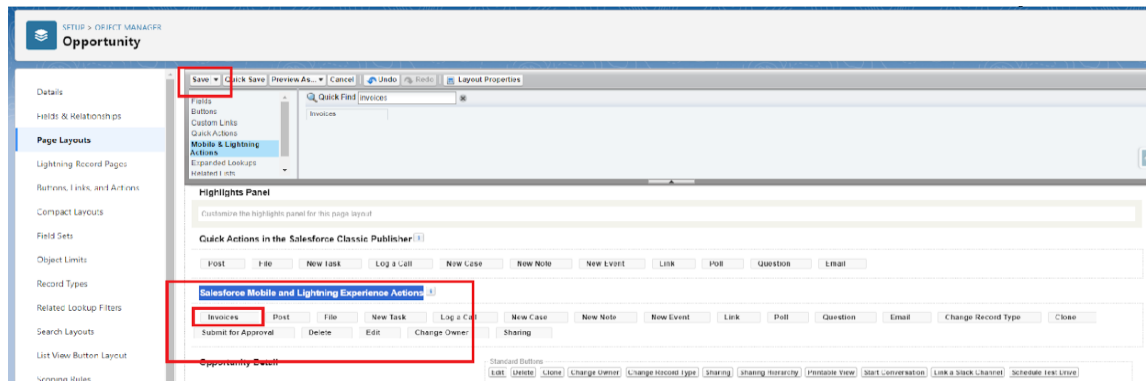
### Activity 7- Create Button to Add on Opportunity

- To add the newly created component to the view, Go to Salesforce Setup
- Click on Object Manager
- Search Opportunity and Click on it .
- click on Button Links and Action.
- click on the New Action.
- Select the InvoiceOpportunity component
  - Label :- Invoices
  - Name :- Invoices
- Click on Save and your action Button is Ready.

### Activity 8- Add InvoiceOpportunity into Opportunity Record Page

- On Opportunity Object Manager Click on Page layout.
- Click on OpportunityLayout.
- Search for invoice on Quick Find.

#### 4. Drag and Drop the Invoice into Salesforce Mobile and Lightning Experience Actions



## Milestone 9-Apex Schedulers

### Activity 1- Delete opportunity Schedule Class

#### Objective :

Through this schedulable class, we can see all the Closed Lost Opportunities.

We can delete all the Closed lost Opportunities by this Scheduled method on every monday as weekly.

1. Login to the respective account and navigate to the gear icon in the top right corner.
2. Click on the Developer console. Now you will see a new console window.
3. In the toolbar, you can see FILE. Click on it and navigate to new and create New apex class.
4. Name the class as “DeleteClosedLostOpportunities ”

#### Code

```
public class DeleteClosedLostOpportunities implements Schedulable{

    public static void execute(SchedulableContext sc){

        List<Opportunity> getLostOpportunities = [SELECT Id, Name From Opportunity
        Where StageName =: 'Closed Lost' LIMIT 50000];

        if(!getLostOpportunities.IsEmpty()){

            Delete getLostOpportunities;

        }

    }


}
```

1. Click on Schedule Apex and enter the Job name.
2. Job Name : DeleteOpportunitySchedule

### Schedule Apex

Schedule an Apex class that implements the 'Schedulable' interface to be automatically executed on a weekly or monthly interval.

Job Name

Apex Class  

Schedule Apex Execution

Frequency

☒ Weekly  
☐ Monthly

Start

End

Preferred Start Time

Exact start time will depend on job queue activity.

Rekurs every week on

☐ Sunday

☒ Monday

☐ Tuesday

☐ Wednesday

☐ Thursday

☐ Friday


☐ Saturday

In the Schedule Apex section , select weekly and select Monday mentioned and preferred time as 10:00 AM.

### Schedule Apex

Schedule an Apex class that implements the 'Schedulable' interface to be automatically executed on a weekly or monthly interval.

Job Name

Apex Class  

Schedule Apex Execution

Frequency

☒ Weekly  
☐ Monthly

Start

End

Preferred Start Time

Exact start time will depend on job queue activity.

Rekurs every week on

☐ Sunday

☒ Monday

☐ Tuesday

☐ Wednesday

☐ Thursday

☐ Friday

☐ Saturday

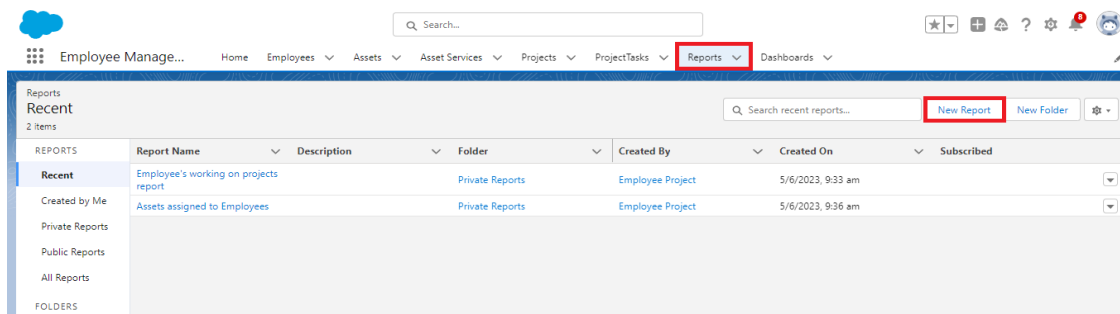
Click on Save. Now enter Apex in the search box and select Apex jobs.

## Milestone 10-Reports

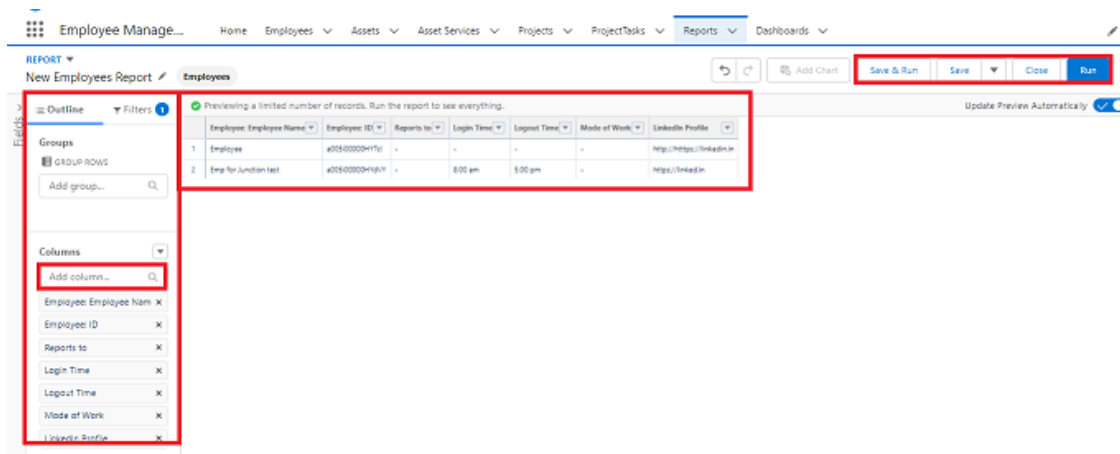
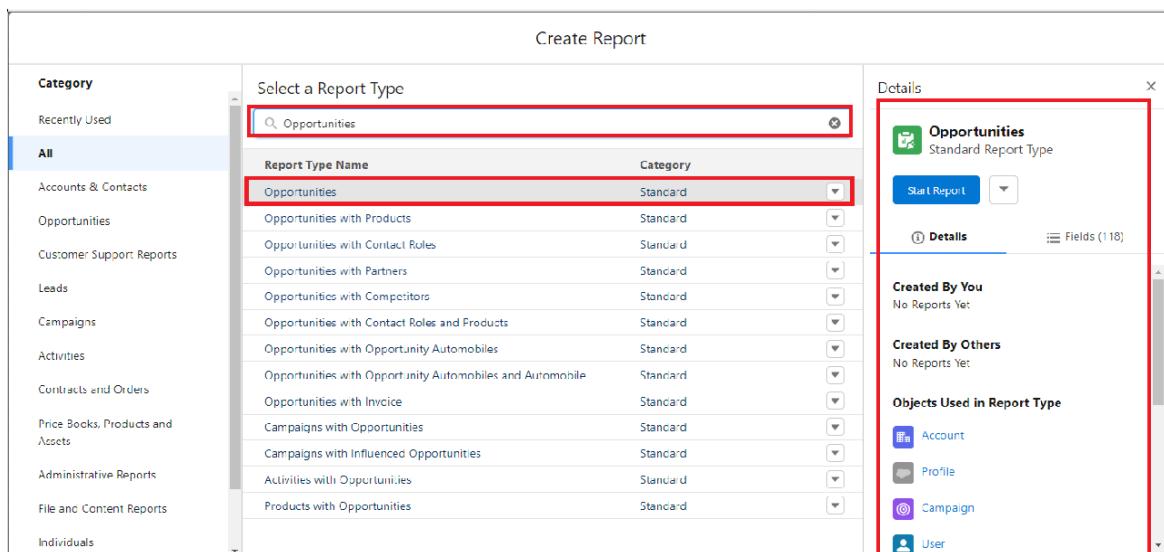
### Activity 1-Create Report on Opportunity

Go to the app >> click on the reports tab

Click New Report.



Select report type from category or from report type panel or from search panel >> click on start report.



## Activity 2- Create Report on Automobile Information

Create a report with a report type : “Automobile Information”.

The screenshot shows the Salesforce Reports page for a user named 'Sales Automobile U...'. The 'Reports' tab is selected, and the 'Automobile Information Report' is displayed. The report is a table with 10 rows of automobile data. The columns are: Automobile Information: Name Of Manufacturer, Model, Built date, Total Number of Cylinders, Colour, Quantity, Price, and VIN. The report is filtered by 'Automobile Information: Created Date' and 'All Time'.

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	2C3CD2AG40H123456
3 Subaru	Outback	14-10-2023	6	Green	56	₹30.00	5J6TF2H51E123456
4 Hyundai	Sonata	08-06-2022	4	Red	78	₹26.00	1G1YY32G555123456
5 Nissan	Altima	25-02-2023	4	Silver	77	₹24.00	2T2HA31U45C123456
6 Audi	A4	12-08-2022	4	Blue	9	₹33.00	1GNEX18R7X0123456
7 Mercedes-Benz	C-Class	18-09-2023	4	Gray	24	₹38.00	JN1EB1CP9XHW123456
8 BMW	3 Series	05-04-2023	6	White	116	₹42.00	WA1VAAF74KD123456
9 Chevrolet	Malibu	30-11-2022	6	Black	33	₹28.00	SV33E1EA3K7123456
10					439	₹276.00	

## Milestone 11-Dashboard

### Sales Dashboard

1. Create Dashboard
2. Go to the app ? click on the Dashboards tabs.
3. Give a Name and click on Create.

The 'New Dashboard' form is shown with the following fields and values:

- Name:** Dashboard 1
- Description:** (Empty)
- Folder:** Private Dashboards

At the bottom, there are 'Cancel' and 'Create' buttons. The 'Create' button is highlighted with a red border.

4. Select a Report and click on select.

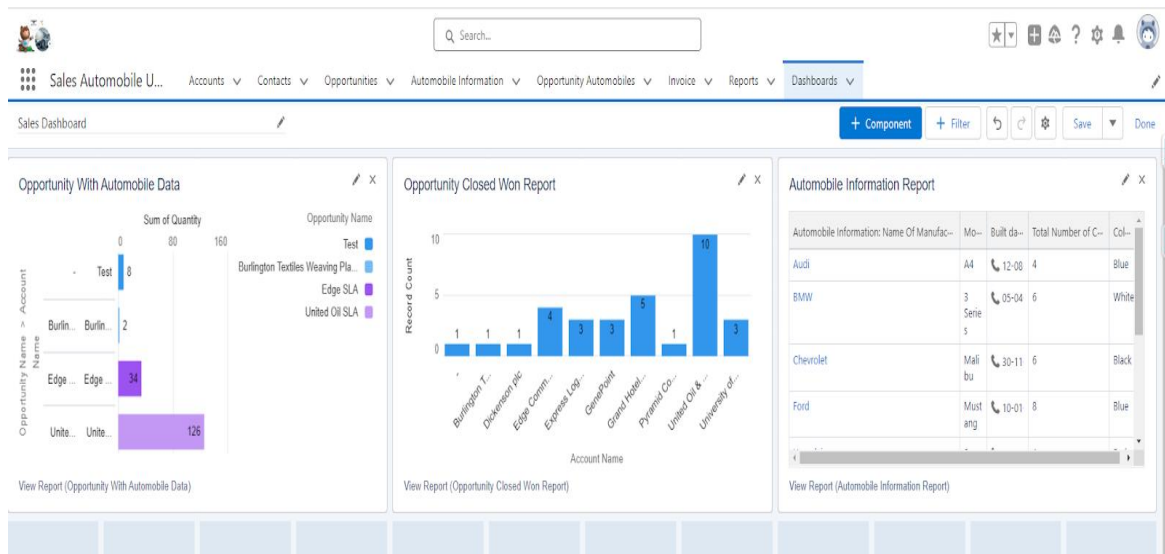
The 'Select Report' dialog is shown with the following content:

- Search:** Q Search Reports and Folders...
- Reports:**
  - Recent
  - Created by Me
  - Private Reports
  - Public Reports
  - All Reports
- Folders:**
  - Created by Me
  - Shared with Me
  - All Folders
- Report List:**
  - Opportunity With Automobile Data  
Mohammad Sameer · 01-Dec-2023, 12:52 pm · Public Reports
  - Opportunity Closed Won Report  
Mohammad Sameer · 01-Dec-2023, 12:21 pm · Public Reports
  - Automobile Information Report  
Mohammad Sameer · 01-Dec-2023, 12:37 pm · Public Reports
  - Sample Flow Report: Screen Flows  
Automated Process · 22-Nov-2023, 2:19 pm · Public Reports

At the bottom, there are 'Cancel' and 'Select' buttons. The 'Select' button is highlighted with a blue border.



The Created Dashboard will look like this.



## Conclusion:

Implementing Salesforce CRM in the automobile industry revolutionizes sales operations by providing a robust platform for efficient lead management, personalized customer engagement, and seamless integration with inventory and marketing tools. Its insightful analytics empower data-driven decision-making, enabling businesses to forecast demand accurately, identify sales trends, and optimize strategies. By streamlining processes and fostering stronger customer relationships, Salesforce CRM not only boosts operational efficiency but also drives significant revenue growth, positioning the automobile industry for sustained success in a competitive market.