SALES AUTOMOBILE USING SALESFORCE

SALESFORCE PROJECT REPORT

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Project Title: SALES AUTOMOBILE USING SALESFORCE

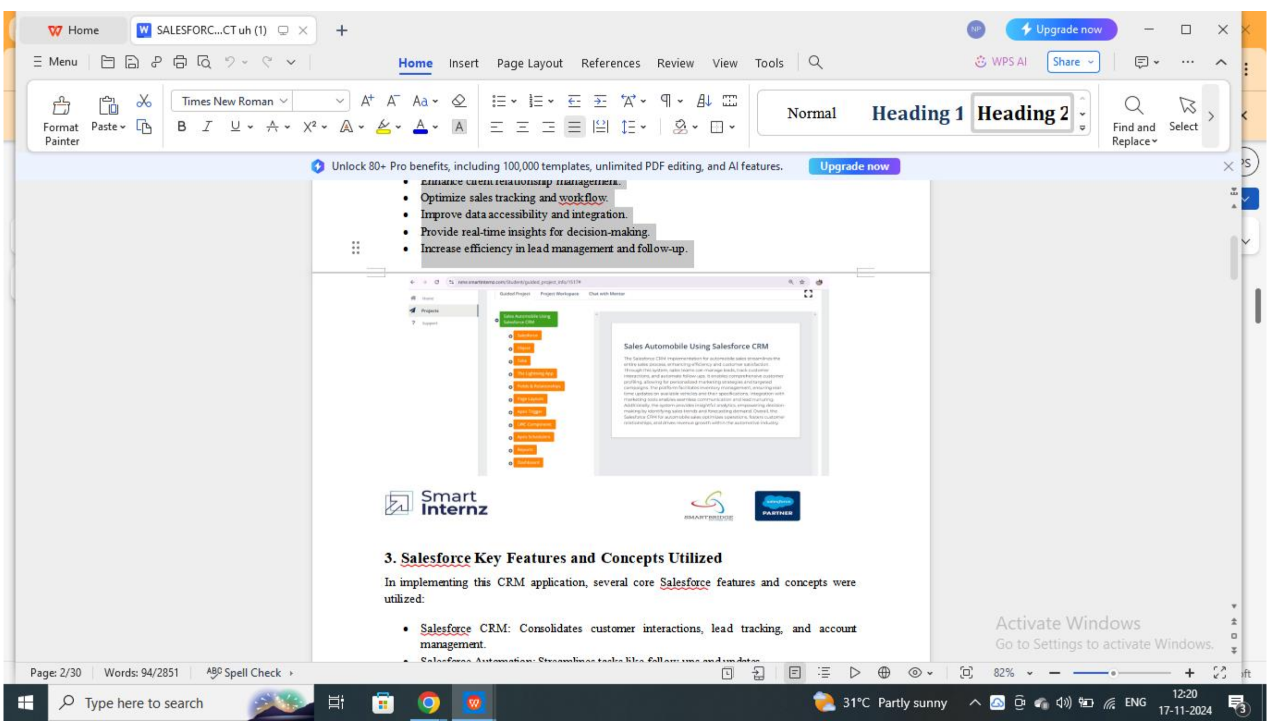
1. Project Overview

This project involves the development and implementation of a Customer Relationship Management (CRM) system tailored specifically for automobile sales. The goal is to streamline client management, enhance customer engagement, and optimize sales processes through Sales-force. By leveraging Salesclerk platform, automobile dealerships can efficiently manage customer data, track interactions, and improve the customer experience from initial inquiry to post-purchase follow-up.

2. Project Objectives (Points Only)

- Enhance client relationship management.
- Optimize sales tracking and work-flow.
- Improve data accessibility and integration.
- Provide real-time insights for decision-making.
- Increase efficiency in lead management and follow-up.

Figure-1

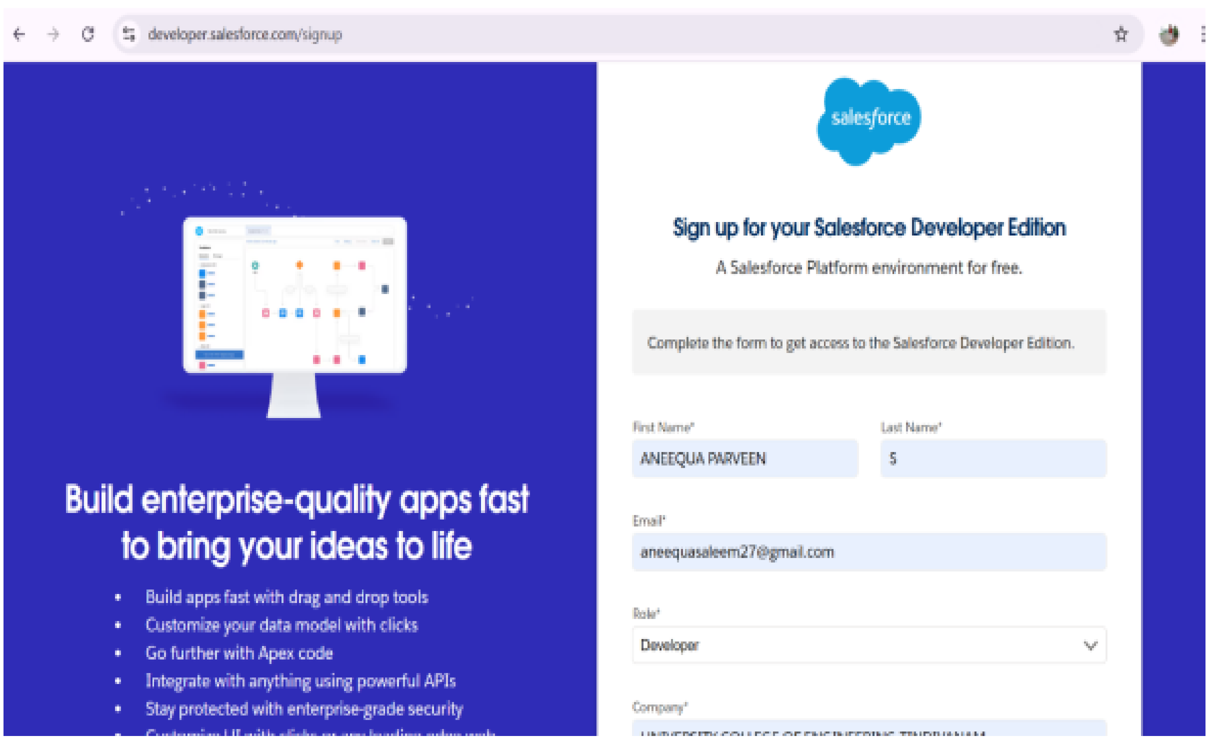


3. Sales-force Key Features and Concepts Utilized

In implementing this CRM application, several core Sales-force features and concepts were utilized:

- Sales-force CRM: Consolidates customer interactions, lead tracking, and account management.
- Sales-force Automation: Streamlines tasks like follow-ups and updates.
- Sales Cloud: Enabled for lead conversion, pipeline management forecasting specific to engineering project work-flows.
- Custom Objects and Fields: Capture auto sales-specific data.
- Reports and Dashboards: Visual insights on sales performance and client engagement.
- Work-flow Rules and Process Builder:Automate tasks, like notifying the sales team when a new lead enters.
- API Integration s: Sync data between Sales-force and other dealership applications.

Figure-2



4. Detailed Steps to Solution Design

Develop thorough documentation of the design, encompassing data models, user interface designs, and business logic. Ensure that all elements are accompanied by relevant screen-shots.

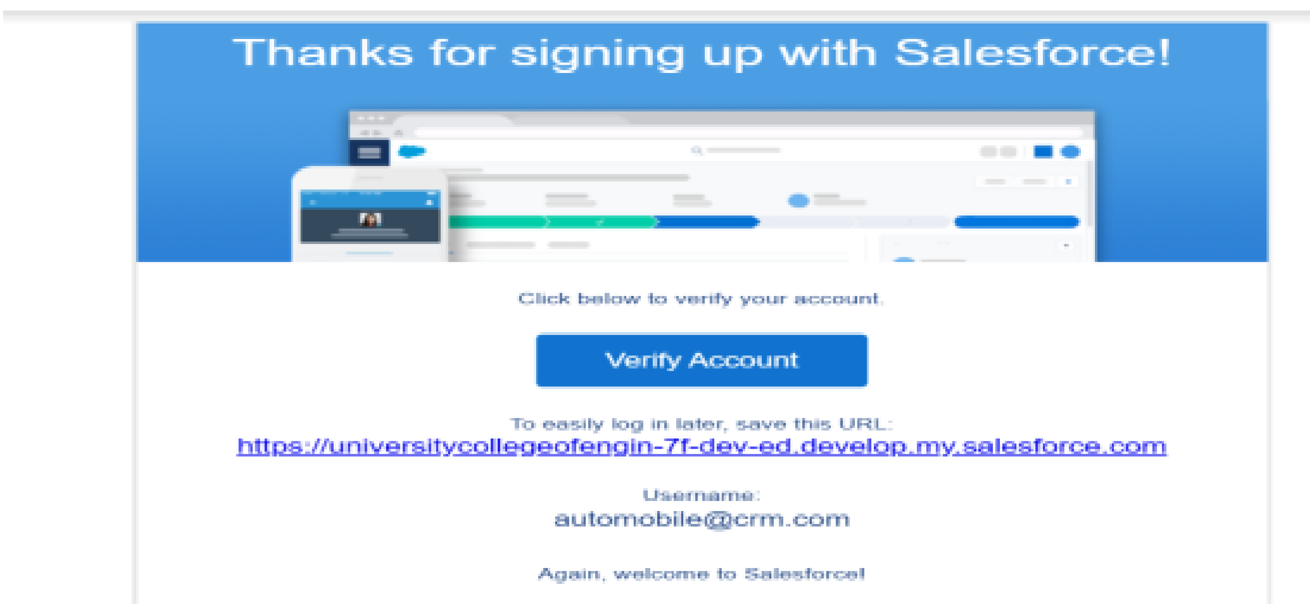
➢ **Creating Developer-account:**

Creating a developer org in sales-force.

1. Go to https://developer.salesforce.com/signup
2. On the sign up form, enter the following details :
3. First name & Last name
4. Email
5. Role : Developer
6. Company : College Name
7. County : India
8. Postal Code : pin code
9. 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 these.

Figure-3



➢ **Account Activation:**

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.

- **Click on Verify Account.**
- **Give a password and answer a security question and click on change password**
- **Then you will redirect to your sales-force setup page.**

OBJECT
Salesforce objects are database tables that permit you to store data that is specific to an organization.

Figure-4

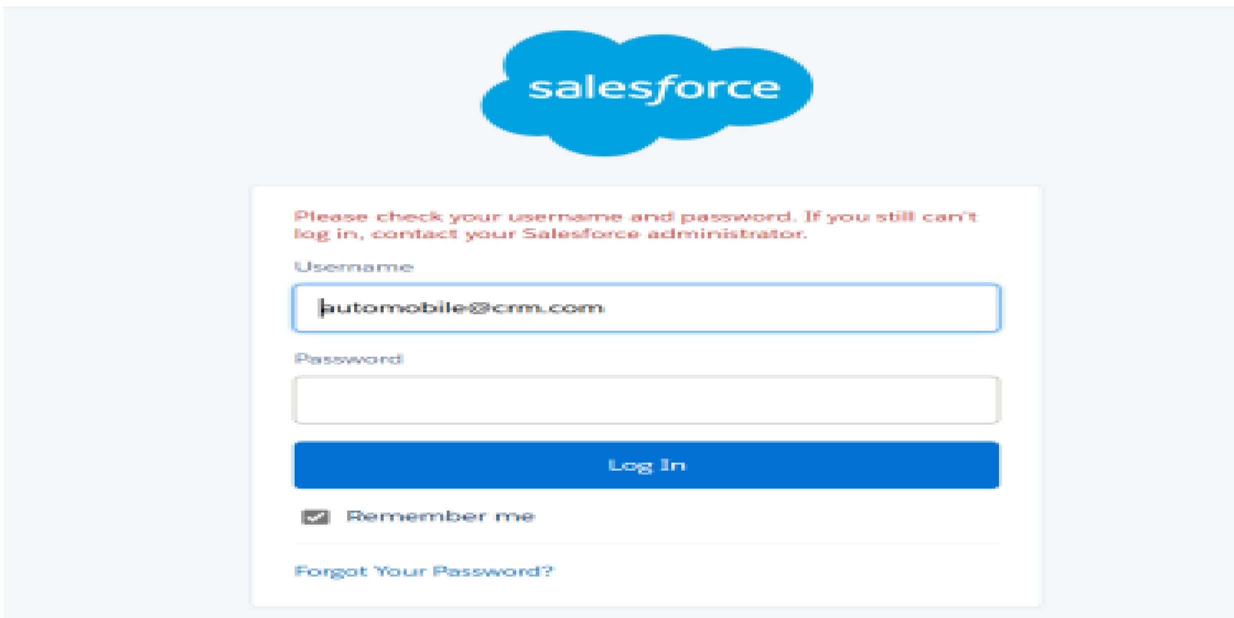
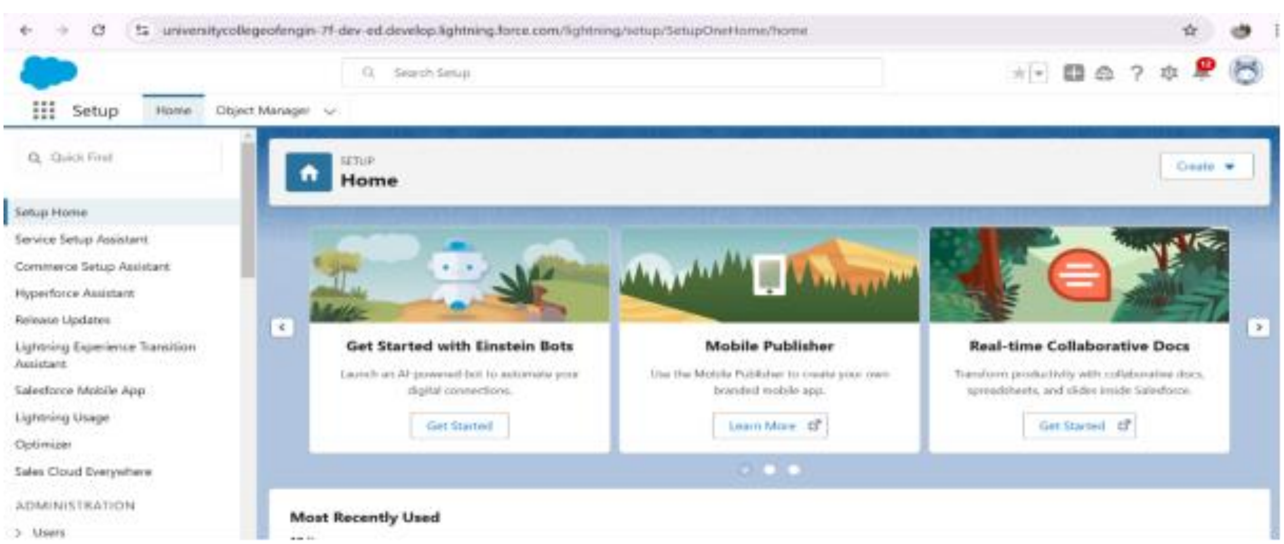


Figure-5



Salesforce objects are of two types:

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

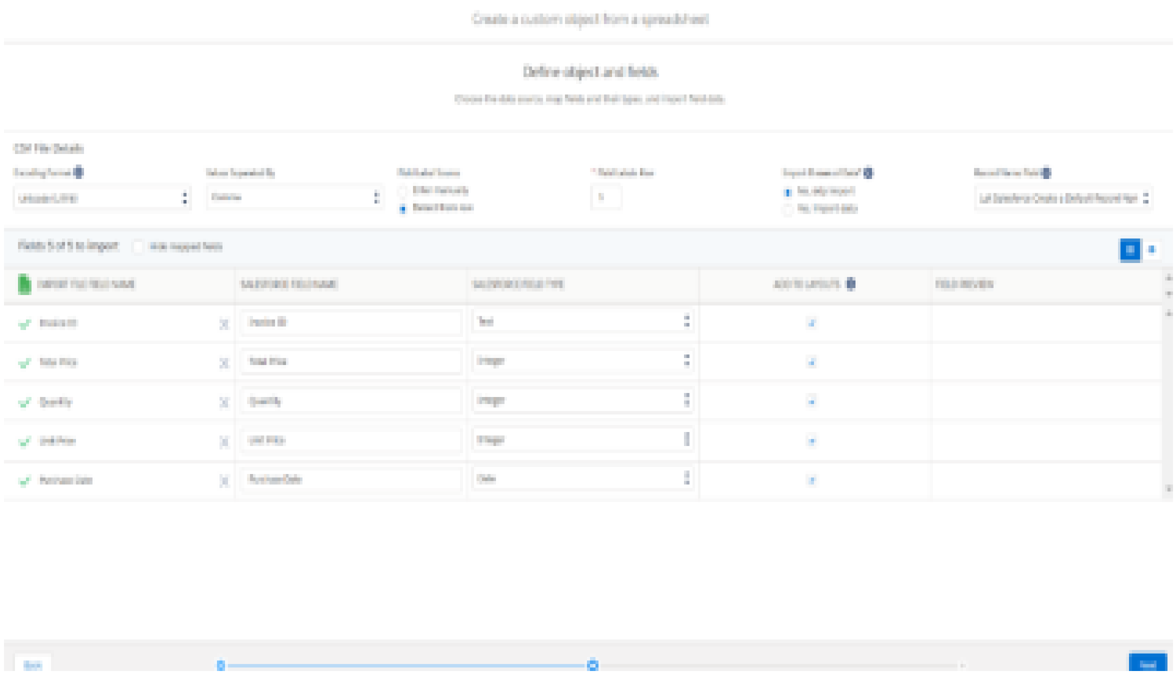
2.Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

Create Invoice Object

Create Invoice object, just as we have created an Automobile Information Object using this sheet Make sure to Download the File into CSV Format.

Note: Make sure you do field mapping with proper field type as **shown below.**

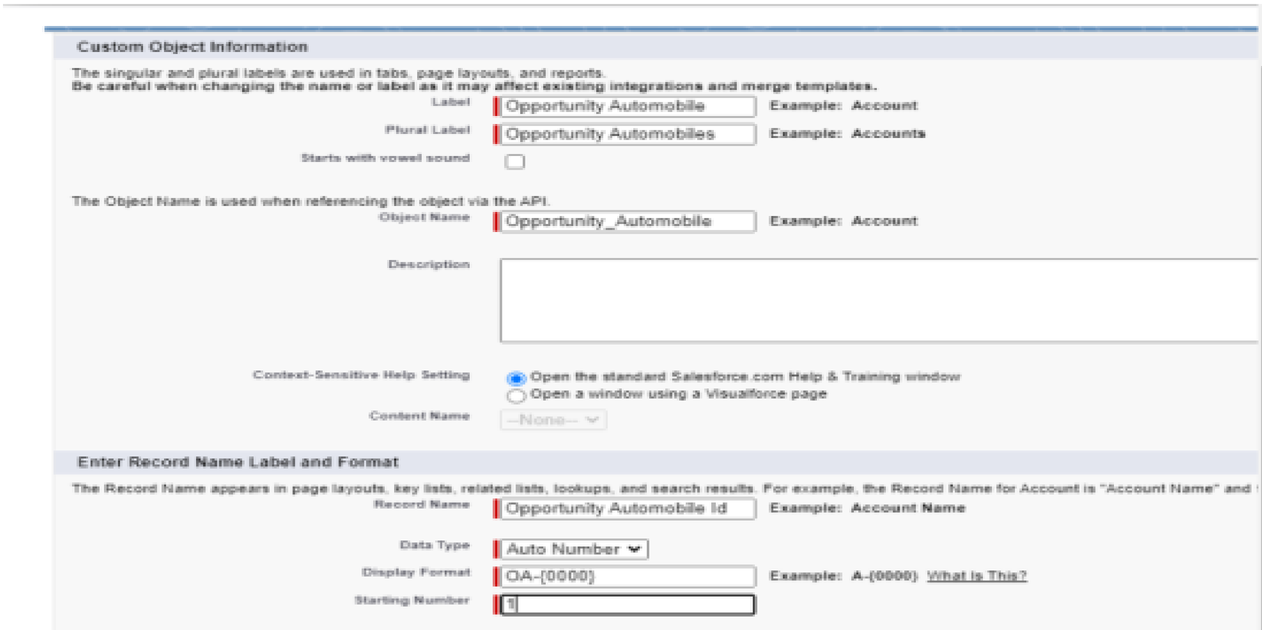
Figure-6



Create Automobile Object

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

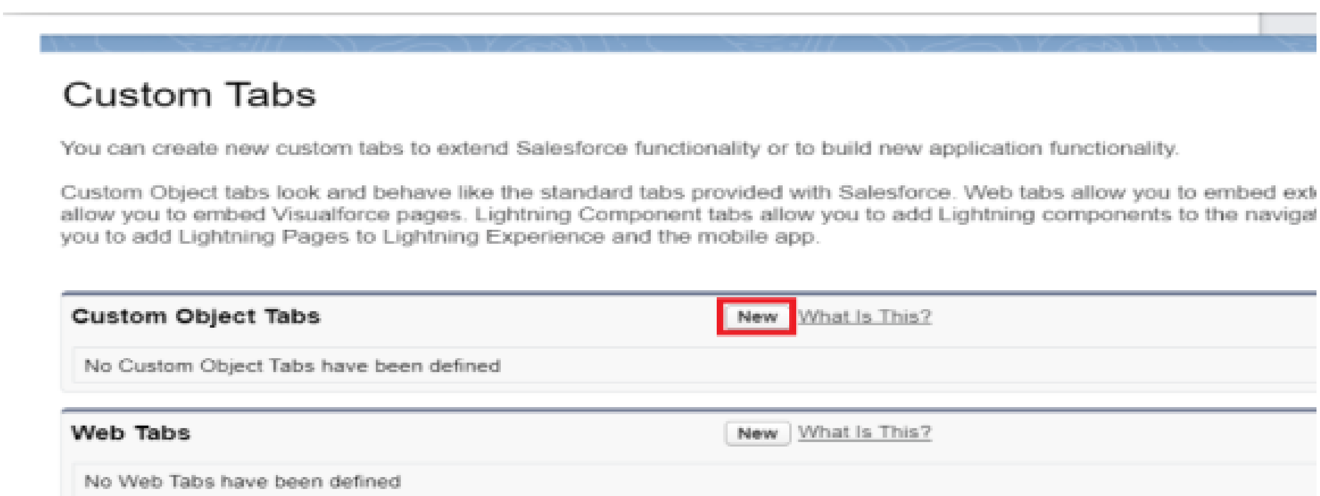
Figure-7



- **Tabs**

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

Figure-8



Types of Tabs:

1. Custom Tabs

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

2. **Web Tabs**

Web Tabs are custom tabs that display web content or applications embedded in the sales-force.com window. Web tabs make it easier for your users to quickly access content and applications they frequently use without leaving the sales-force.com application.

Visual-force Tabs

Visual-force Tabs are custom tabs that display a Visual-force page. Visual-force tabs look and behave like standard sales-force.com tabs such as accounts, contacts, and opportunities.

Lightning Component Tabs

Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.

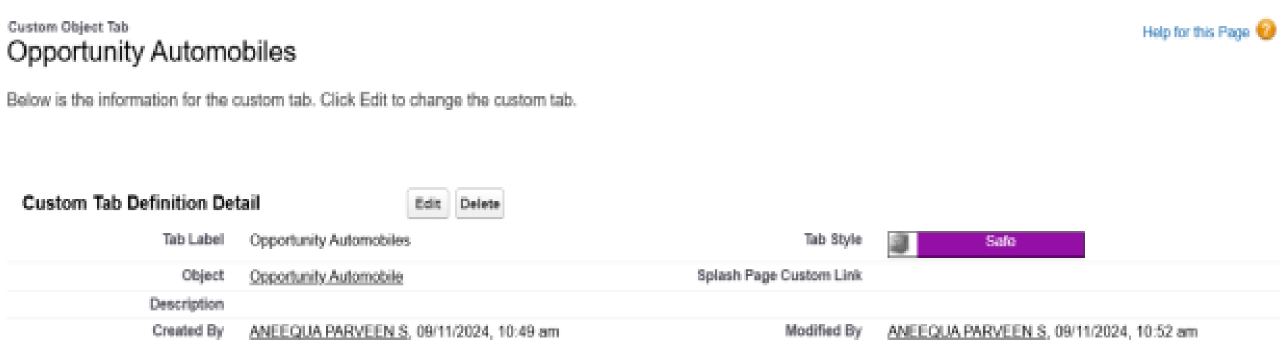
Lightning Page Tabs

Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu.Lightning Page tabs don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs. Lightning Page tabs also don't show up in the Available Tabs list when you customize the tabs for your apps.

Creating a Custom Tab

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

Figure-9



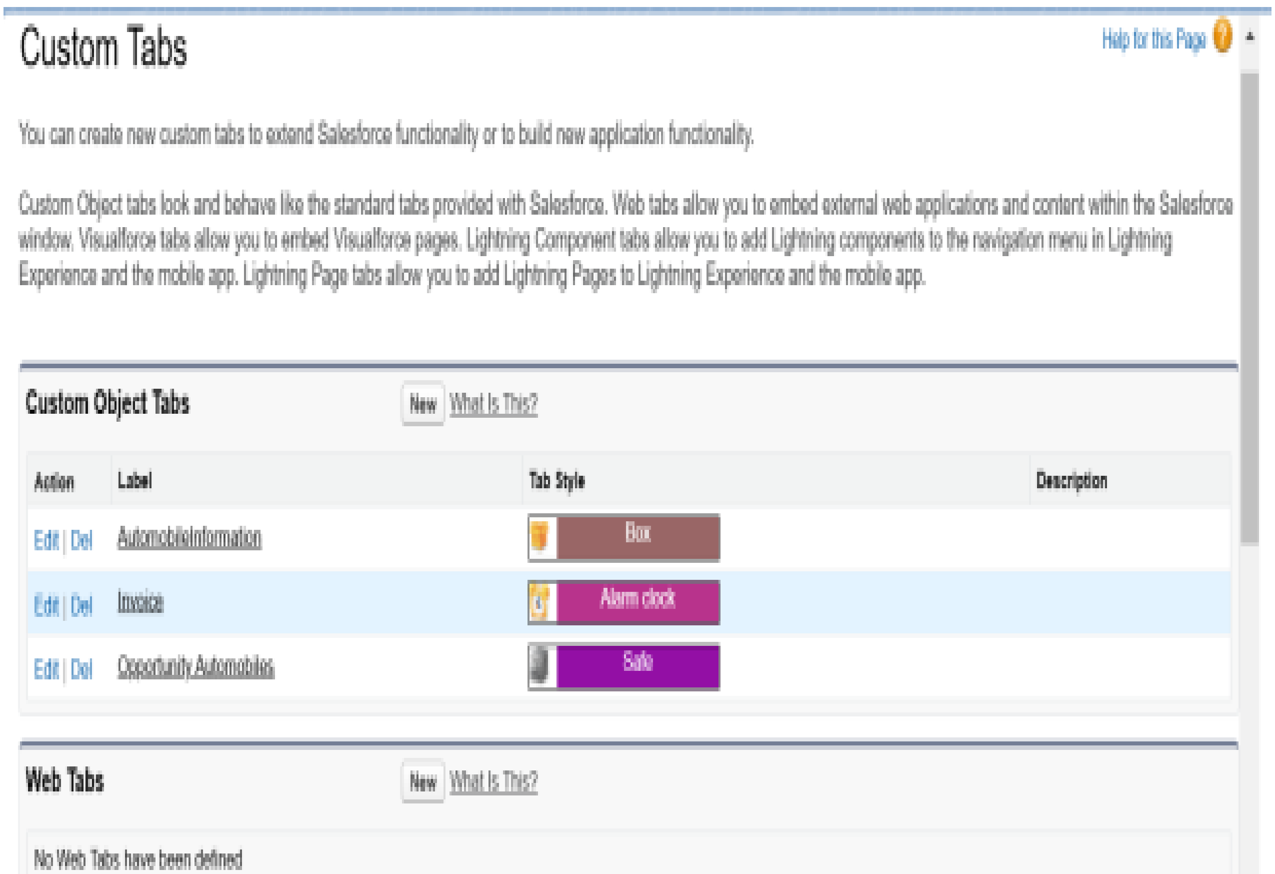
➢ The Lightning App

- 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 then a vitiation 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.

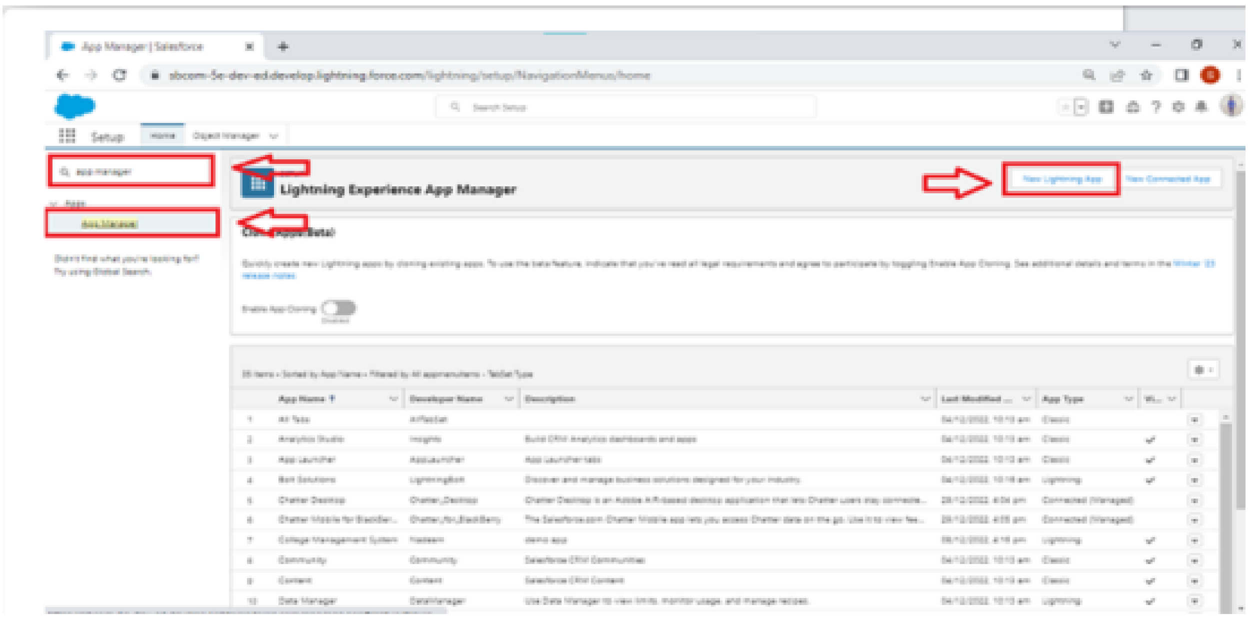
Figure-10



Create a Lightning App

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

Figure-11



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

App Name :Sales Automobile Using Sales-force CRM

Developer Name : this will auto populated

Description : Give a meaningful description

Image : optional (if you want to give any image you can otherwise not mandatory)

Primary color hex value : keep this default

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

4.Add Navigation Items:

Search the items in the search bar(Account,Contact ,Opportunities,Automobile Information,Opportunity Automobile,Invoice, Reports, Dashboard) from the search bar and move it using the arrow button ? Next. Note: select asset the custom object which we have created in the previous activity.

5.Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.

Figure-12

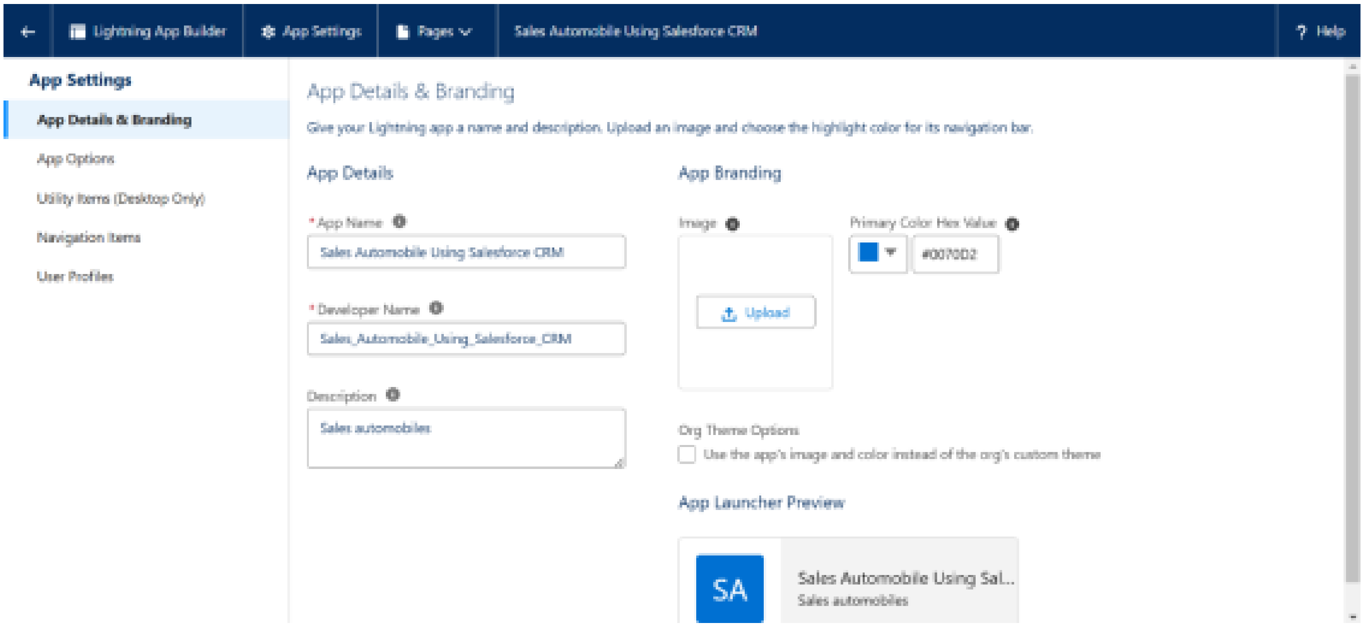


Figure-13

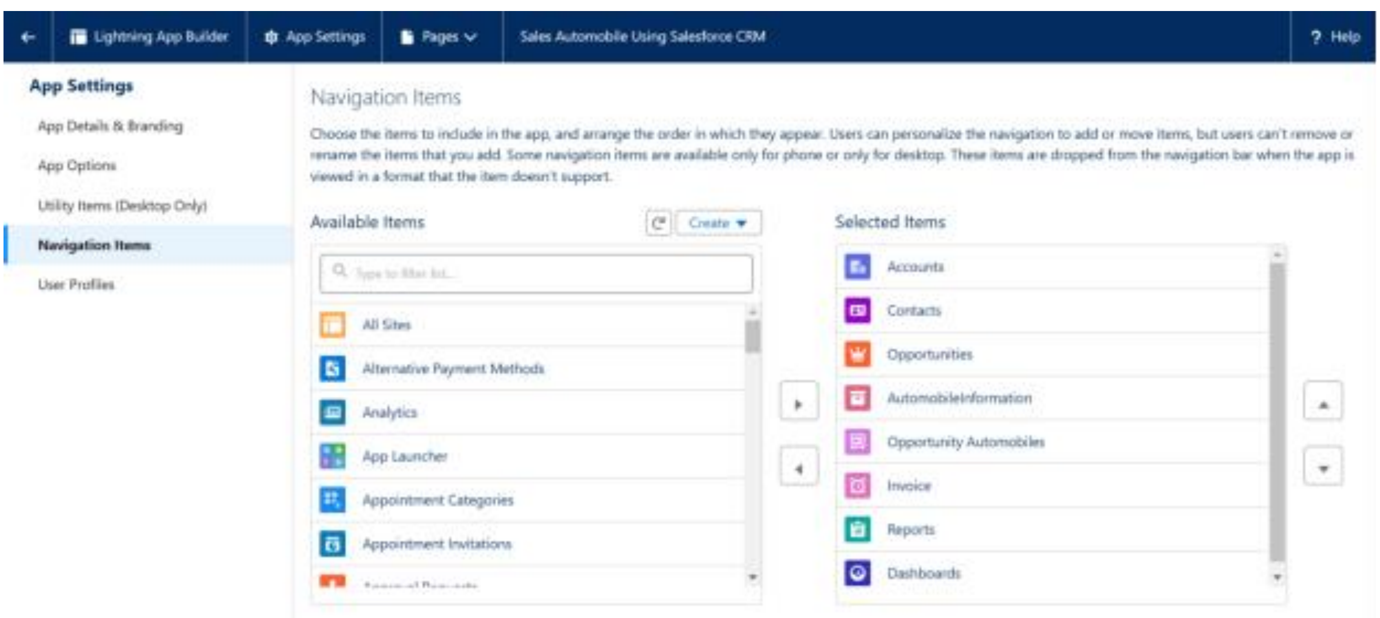
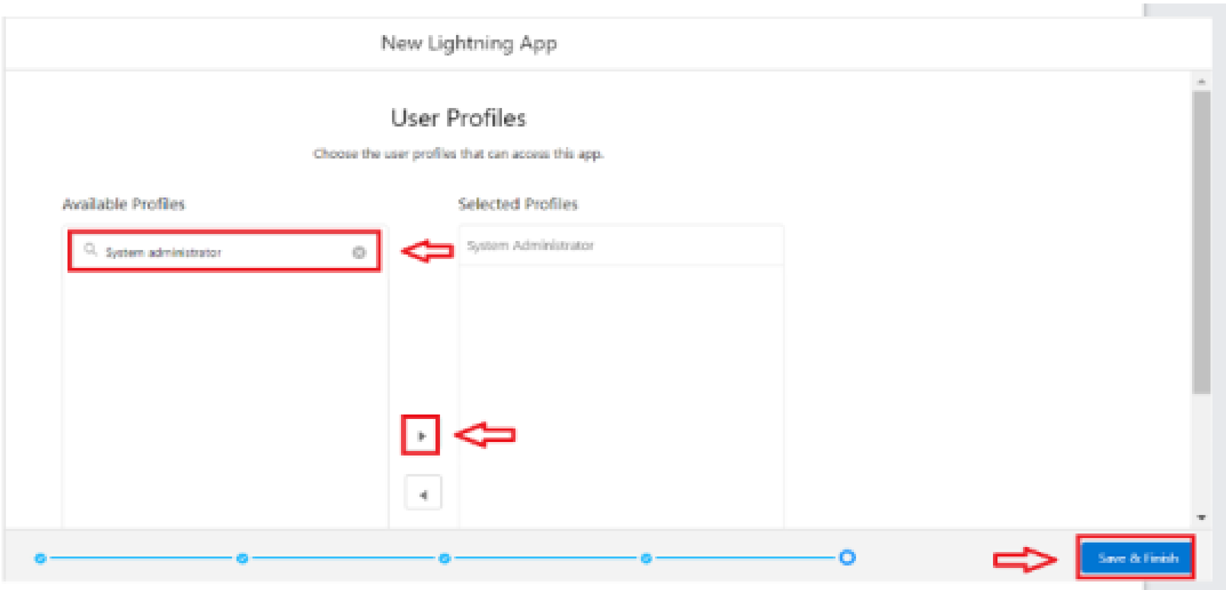


Figure-14



- **Fields & Relationships**

When we talk about Sales-force, 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

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Sales-force 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 Sales-force application. They are,

Created By

- Owner
- Last Modified
- Field Made During object Creation

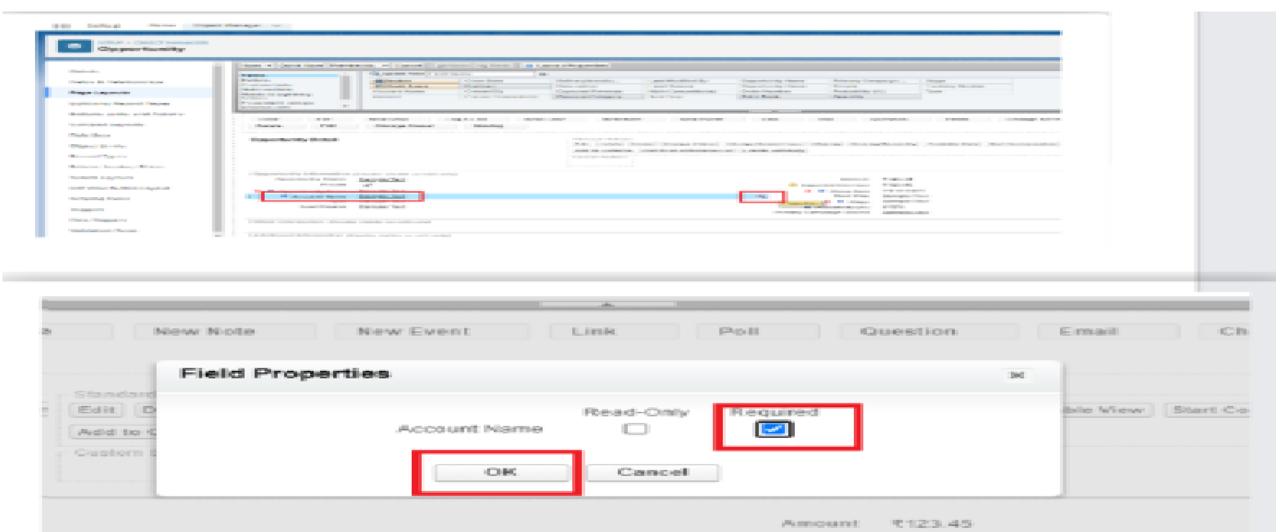
Custom Fields:
On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organizer or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

Page Layouts
Page Layout in Sales-force allows us to customize the design and organize detail and edit pages of records in Sales-force. 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.

Edit the Page layout for Opportunity Object

- Go to Setup >> Click on Object Manager >> On the search bar, select Opportunity Layout. You can notice Page Layouts on the left panel
- Click on Page Layouts, Click on 'Opportunity Layouts'.
- In the Opportunity Detail Section, you can see various fields. Go on Account And Click on that Properties icon of Account name Field.
- check the Required box for Account name and click on Ok.
- Click on Save.

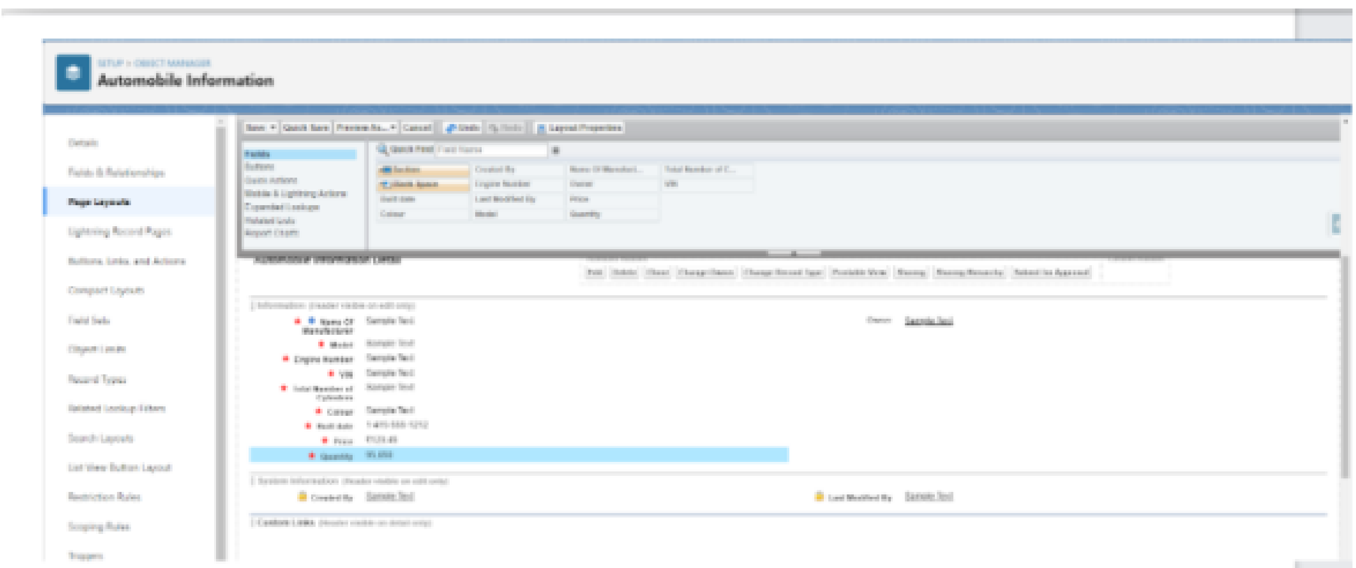
Figure-15



Edit the Page layout for Automobiles Information

- Go to Setup >> Click on Object Manager >> On the search bar, select Automobile Information. You can notice Page Layouts on the left panel
- Click on Page Layouts. Click on ‘Automobile Information Layout’.
- Just Go for each one field of Automobile Information Object, Click on Gear Icon and mark as Required just as Done for Above Account Object. After required is done it will show the red color as given in below image.

Figure-16



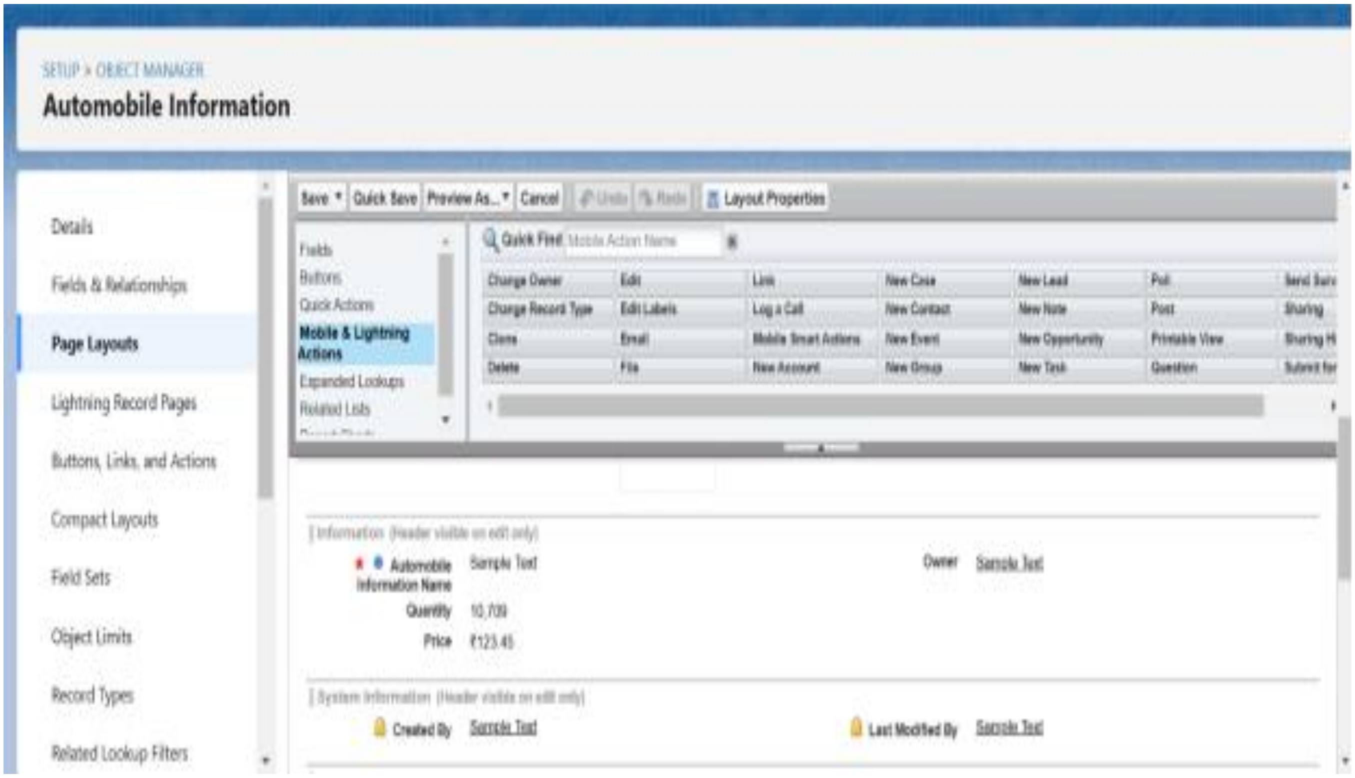
- Adjust the Fields as given below for A good looking view.

➢ **Apex Trigger**

Apex can be invoked by using triggers. Apex triggers enable you to perform custom actions before or after changes to Sales-force records, such as insertions, updates, or deletions.
A trigger is Apex code that executes before or after the following types of operations:

- insert
- update
- delete
- merge
- upset
- undelete

Figure-17



- Before Trigger: This type of trigger in Sales-force 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 Sales-force 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.

Opportunity Automobile quantity Use-Case :

Whenever Opportunity Closed won Than Neglect / Minus the Quantity From Automobile Information on the Bases of Opportunity Automobile quantity.Login to the respective trail-head 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.**
- **Name the class as “Opportunity Handler Class ”.**

➢ LWC Component

Create Apex Class to Get Invoices

Use Case :

Whenever an opportunity is Closed won then create the Invoice on the Bases of Opportunity Automobile Data. Login to the respective trail-head 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.
  - Name the class as "Invoice-creation".

Figure-18

Install Sales-force CLI

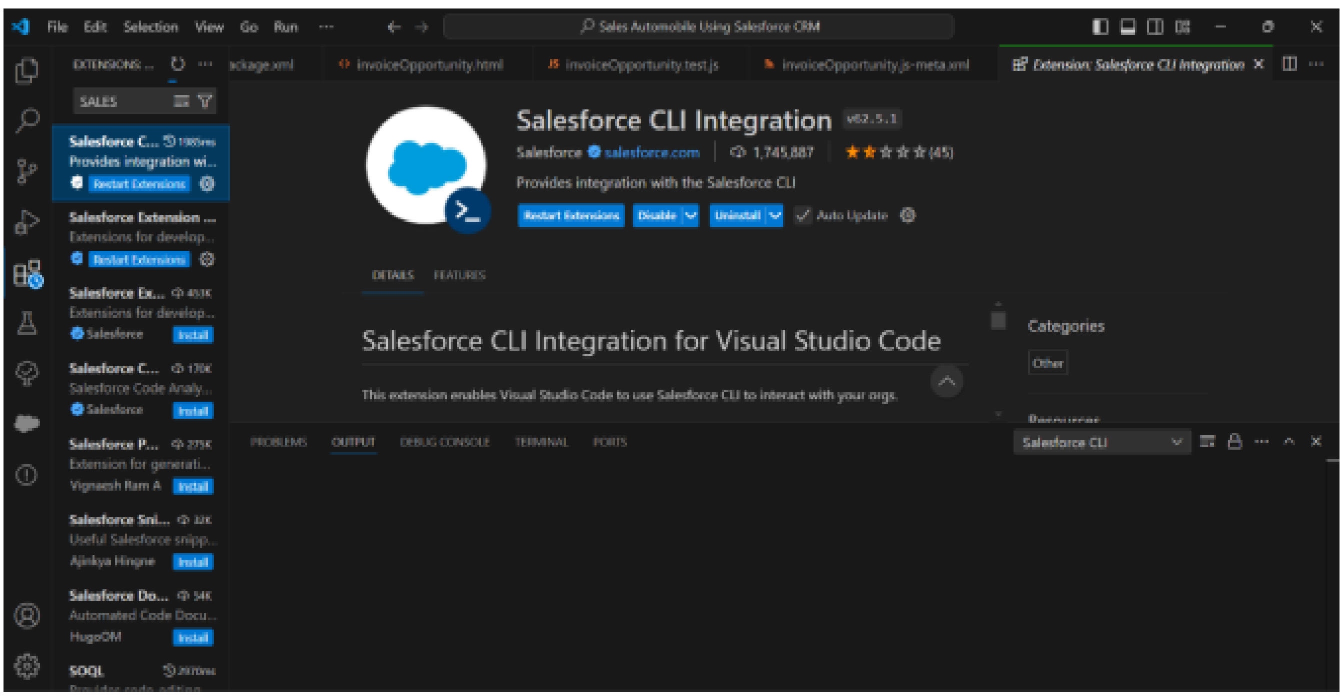
The Sales-force CLI is a powerful command line interface that simplifies development and build automation when

working with your Sales-force org.

[Download and install Salesforce CLI]

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

Figure-19



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.

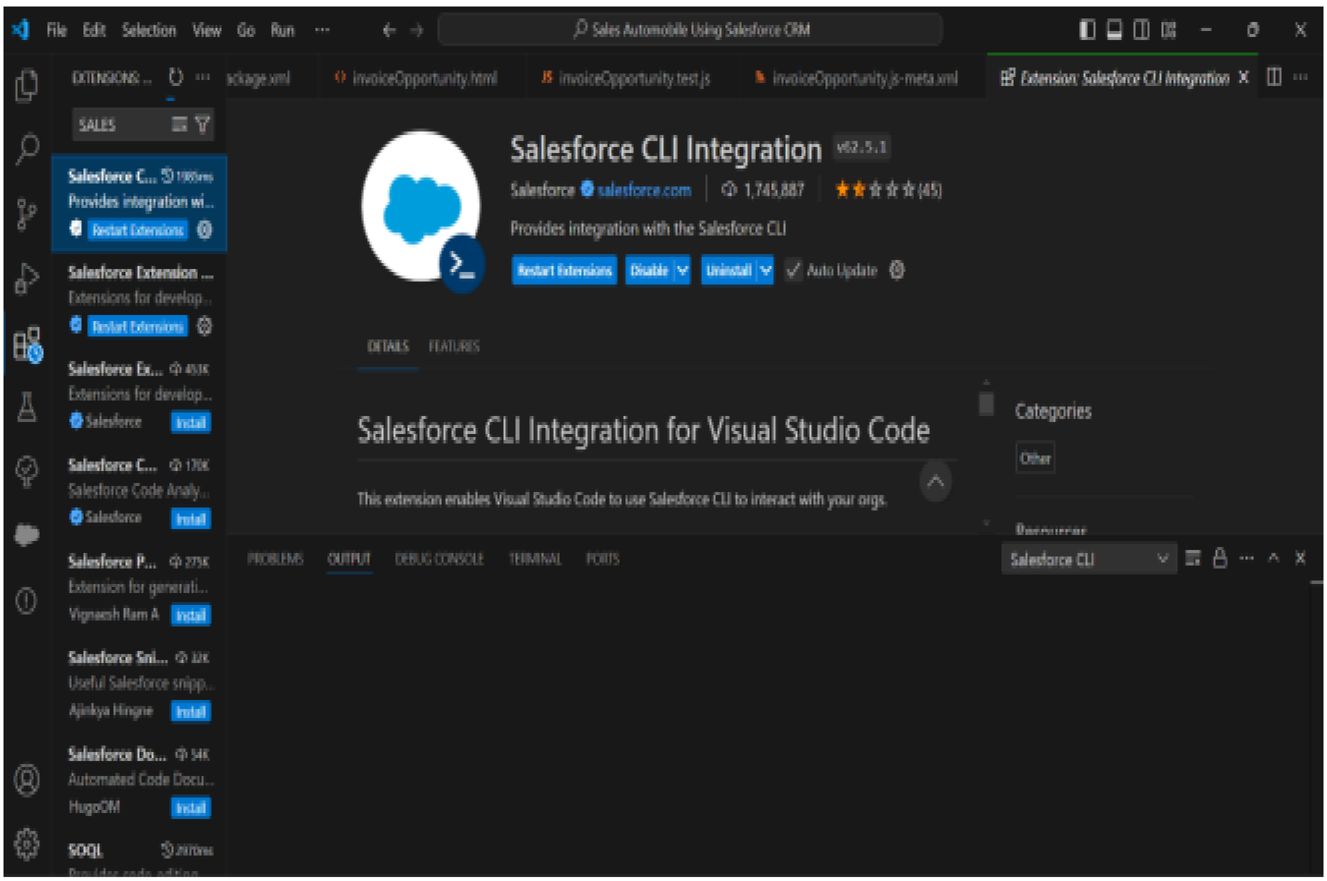
[Download the version of the software] that is compatible with your operating system and install it.

Install the Sales-force Extension Pack

In the VS Code,

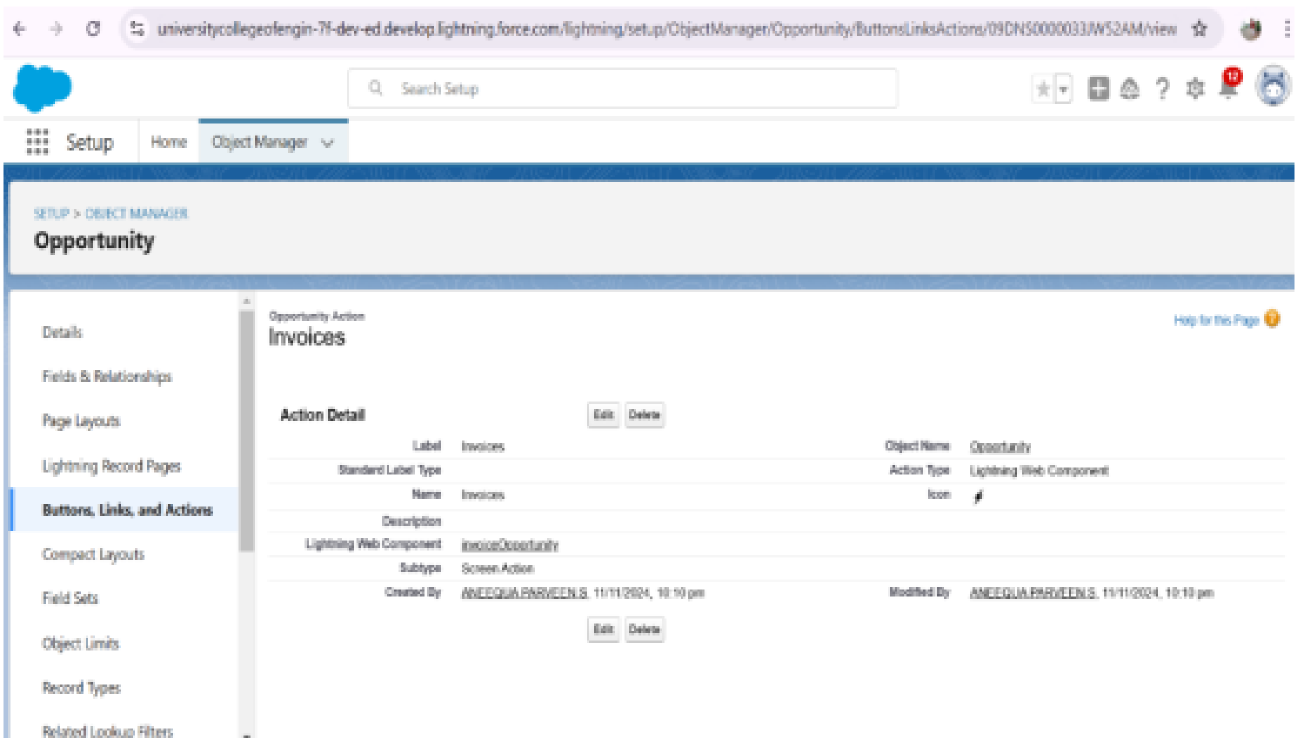
1. go to extensions (1) as shown in the image below.
2. Search with the Sales-force extension pack (2) as shown in the image below.
3. select Sales-force Extension Pack from the list (3) as shown in the image below.
4. Click the Install button (4) as shown in the image below.

Figure-20



Add Invoice Opportunity into Opportunity Record Page

Figure-21



SYNTAX :

```
public class Some-class implements Schedule {
   public void execute(Schedule Context ct x) {
      // awesome code here
   }
}
```

Delete opportunity Schedule Class

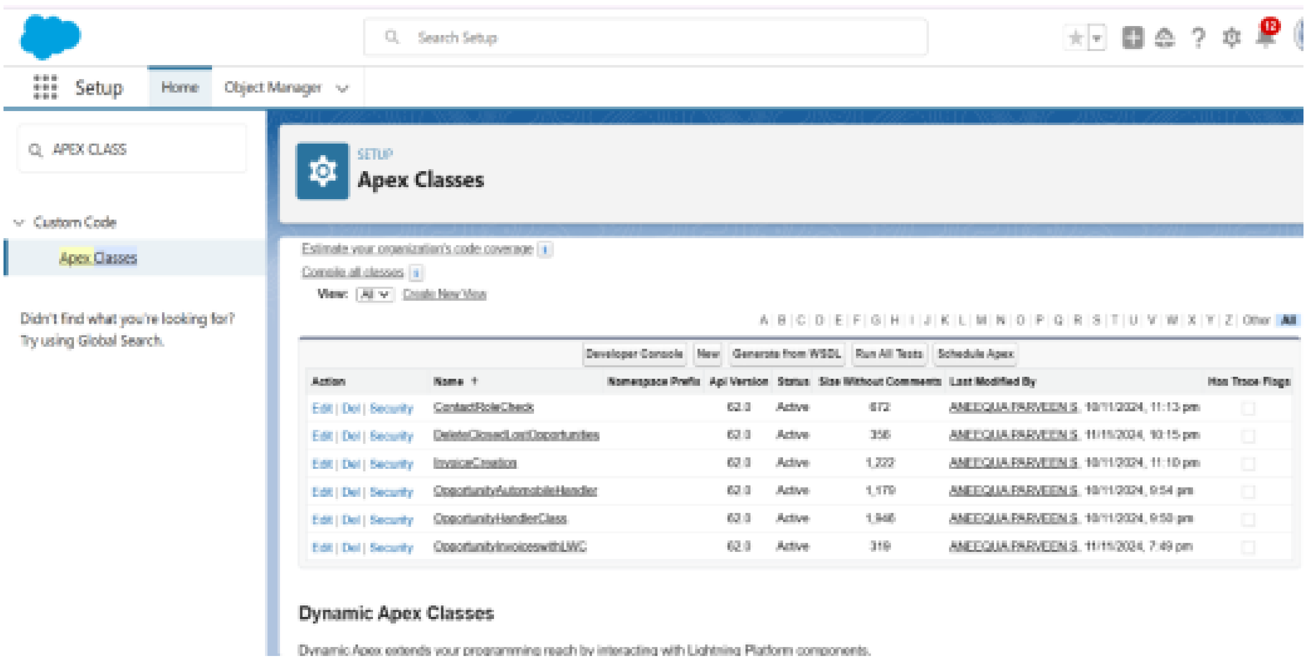
Schedule the Apex class:

- Go to the Home page in your sales-force account.

- In the search bar, enter Apex and click on Apex Classes Click on Schedule Apex and enter the Job name

Job Name : Delete Opportunity Schedule

Figure-22



➢ Reports

Reports give you access to your Sales-force data. You can examine your Sales-force 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 Sales-force

1. Tabular
2. Summary
3. Matrix
4. Joined Reports

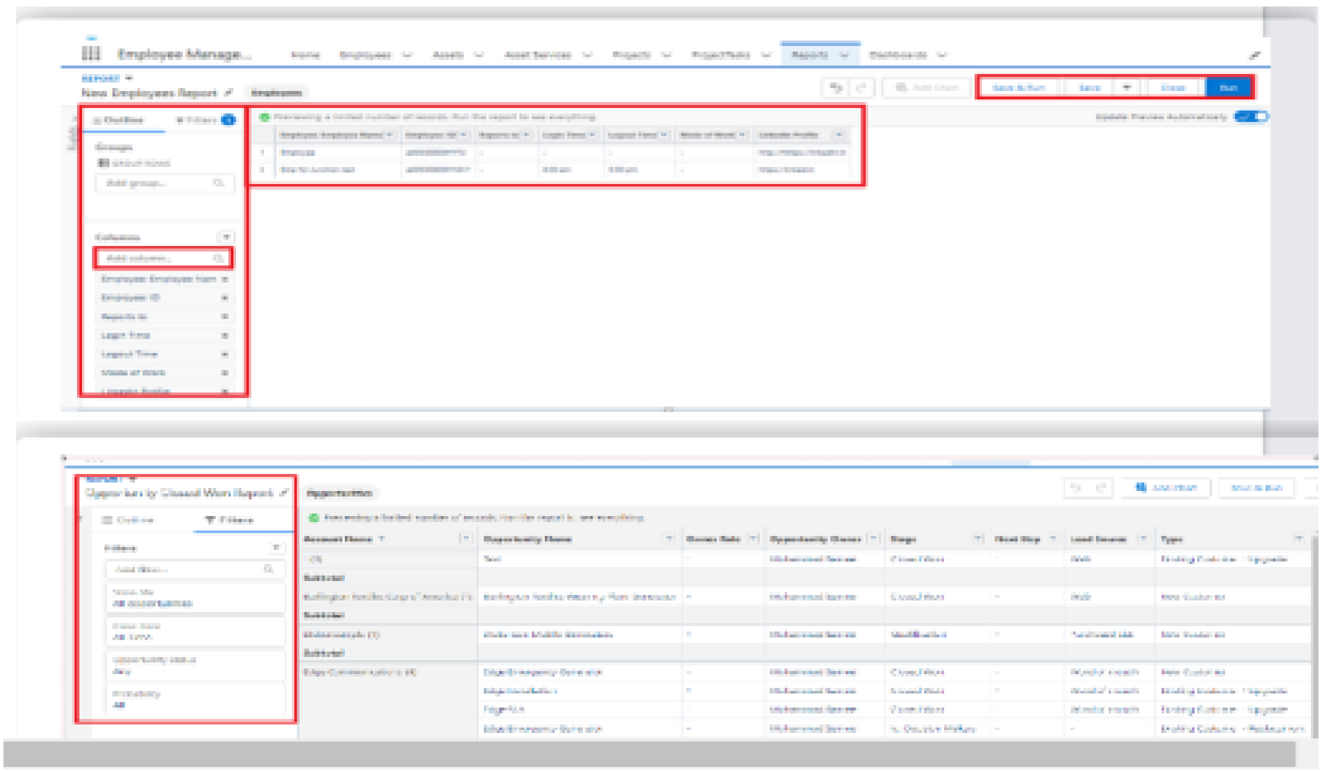
Use Case:

The CEO of an organization wants to have brief data on Opportunity Sales along with Invoices generated. Let's create a Report.

Create Report on Opportunity

- Go to the app >> click on the reports tab
- Click New Report.

Figure-23



- **Select report type from category or from report type panel or from search panel >> click on start report.**
- **Add fields from left pane as shown below**

Create Report on Automobile Information

1. Create a report with a report type: “Automobile Information”.
2. Create a Report by using “Opportunities with Opportunity Automobiles and Automobile” Report Type.

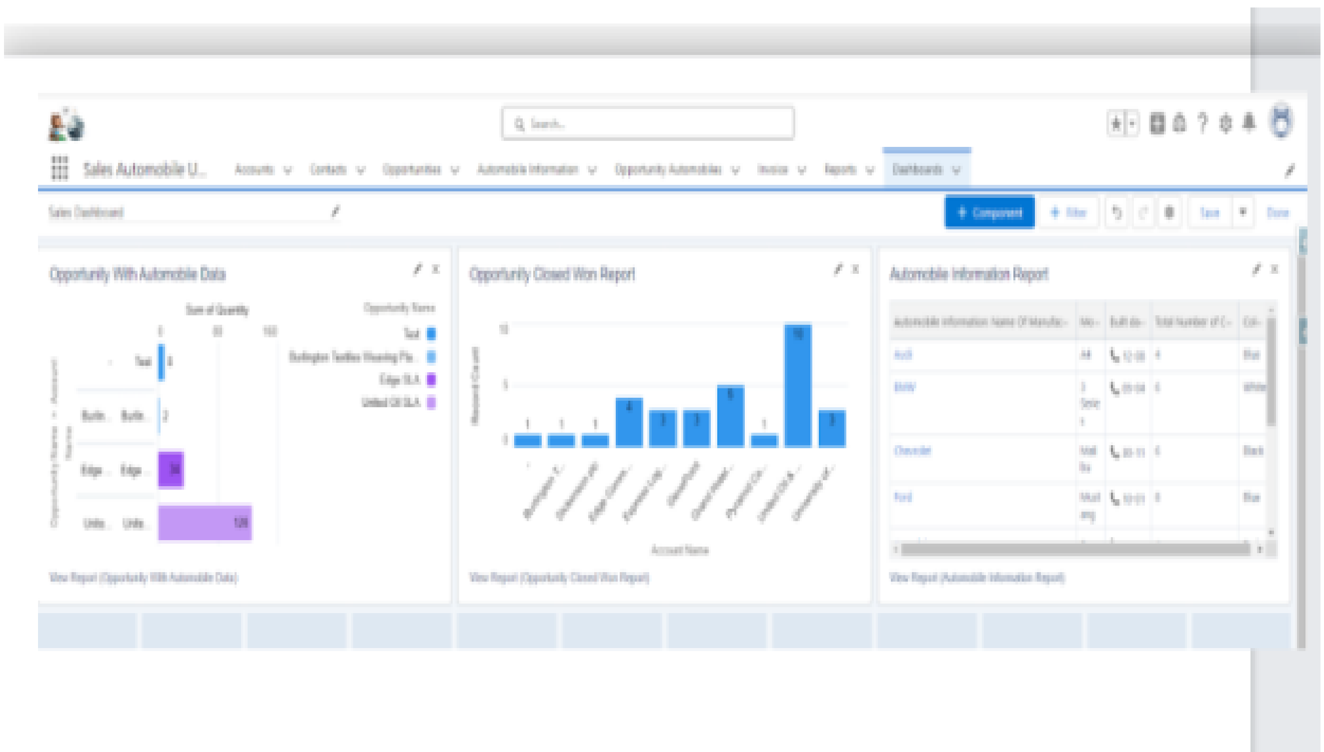
➢ Dashboard

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
- Select add component.
- Click Add then click on Save and then click on Done.

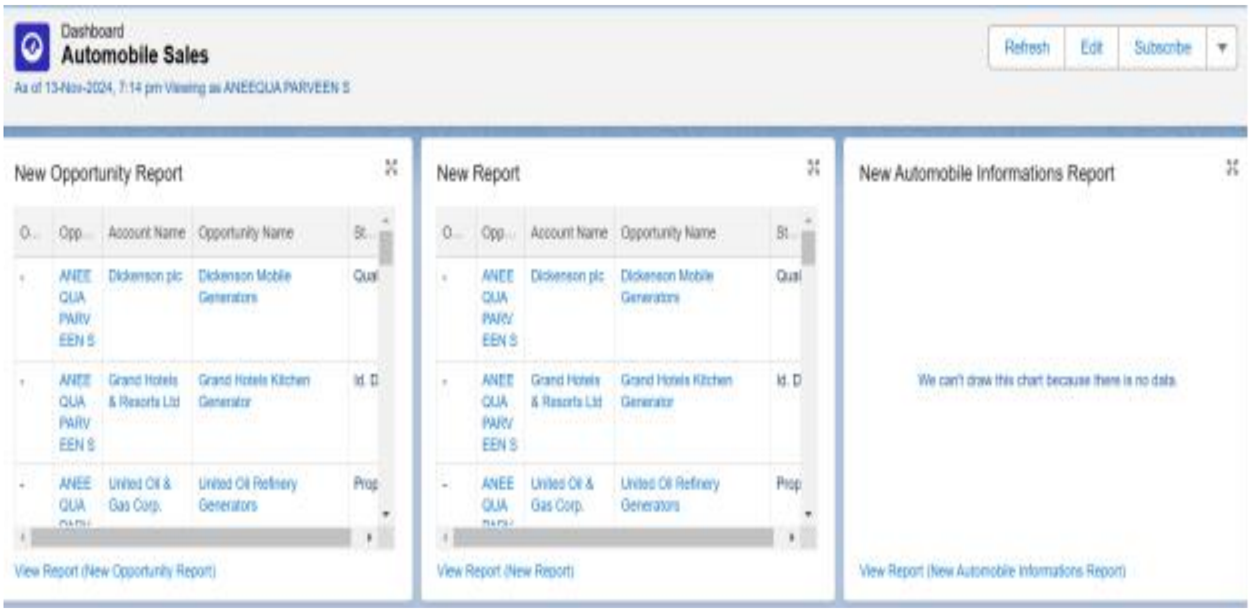
Figure-24



1.Detailed Steps to Solution Design:

- Consulted stakeholders to gather requirements specific to engineering work-flows.
- Identified key CRM features to support customer interaction tracking, project status monitoring, and documentation management. 2. Sales-force Setup and Configuration:

Figure-25



2. Sales-force Setup and Configuration:

- Configured Sales-force instances with Sales Cloud.
- Created custom objects to accommodate data unique to engineering works (e.g., project specs, engineering documents).
- Set up roles and profiles to ensure data security and access control.

3. Data Modeling and Field Customization:

- Defined custom objects such as Projects, Clients, and Tasks.
- Added fields to capture essential data, including project start and end dates, budgets, materials used, etc.

4. Work-flow Automation:

- Configured work-flows to automate task assignments, lead conversions, and client follow-ups.
- Created rules that trigger email notifications for new leads or when projects reach critical milestones.

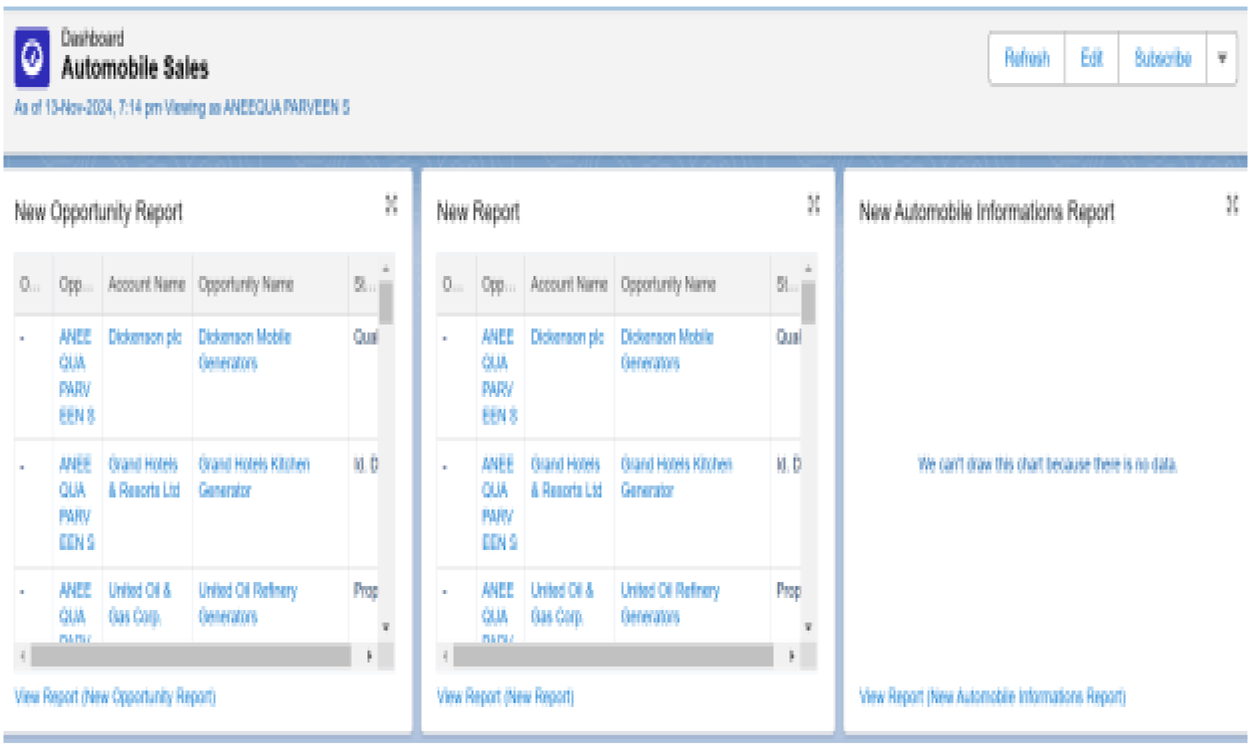
5. Integration with Engineering Tools:

- Integrated Sales-force with project management and engineering software to sync project updates in real time.
- Used API to allow seamless data transfer between Sales-force and other engineering tools.

6. Design of Dashboards and Reports:

- Developed dashboards to display key performance indicators, such as project progress, team efficiency, and client satisfaction.
- Created real-time reports for tracking the sales pipeline, revenue forecasts, and project health.

Figure-26



Testing and Validation

- Unit Testing: Validated each Sales-force module separately, including lead management, sales tracking, and customer follow-up features, ensuring individual functionality work as expected.
- System Testing: Tested the entire CRM setup for seamless integration of all Sales-force features, including custom objects, work-flows, and automation, to confirm they function cohesively.
- User Acceptance Testing (UAT): Conducted UAT with dealership stakeholders, confirming that the CRM solution met business requirements for automobile sales, lead tracking, and customer engagement.
- Load Testing: Tested system performance under various loads to ensure it could handle high traffic during peak sales periods, such as holiday promotions or sales events.

6. Key Scenarios Addressed by Sales-force in The Implementation Process

- **Lead Management**: Automated lead assignment to sales engineers, ensuring prompt follow-ups and reducing the chances of losing potential clients.
- **Project Life-cycle Tracking**: Allowed teams to track the status of each engineering project, from design and approval to implementation and delivery.
- **Client Communication and Documentation**: Centralized client communications and engineering documents within Sales-force for easy access and retrieval.
- **Forecasting and Budget Management:** Provided accurate forecasting of project costs and time-lines to help engineers and managers make informed decisions.
- **Customer Feedback and Follow-Up**: Enabled tracking of customer satisfaction and automated reminders for post-project feedback collection.

Figure-27

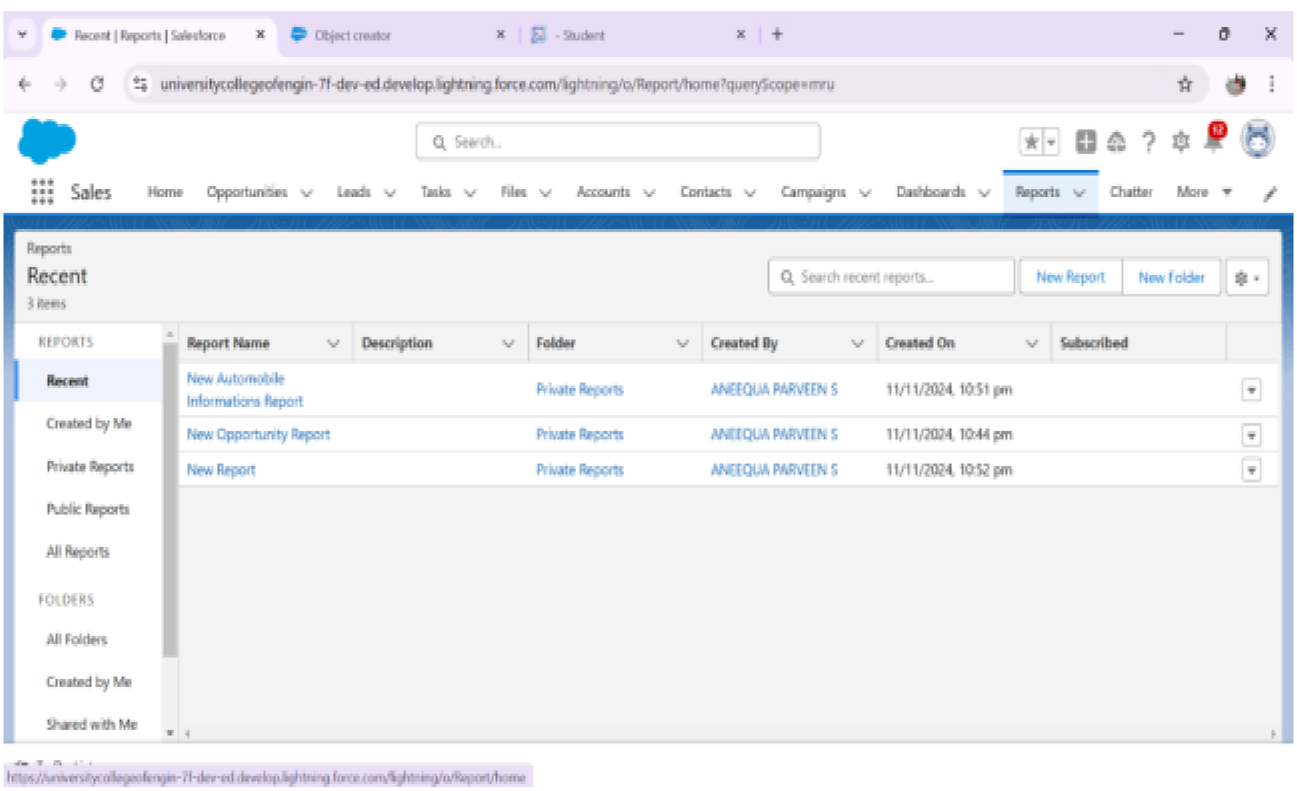
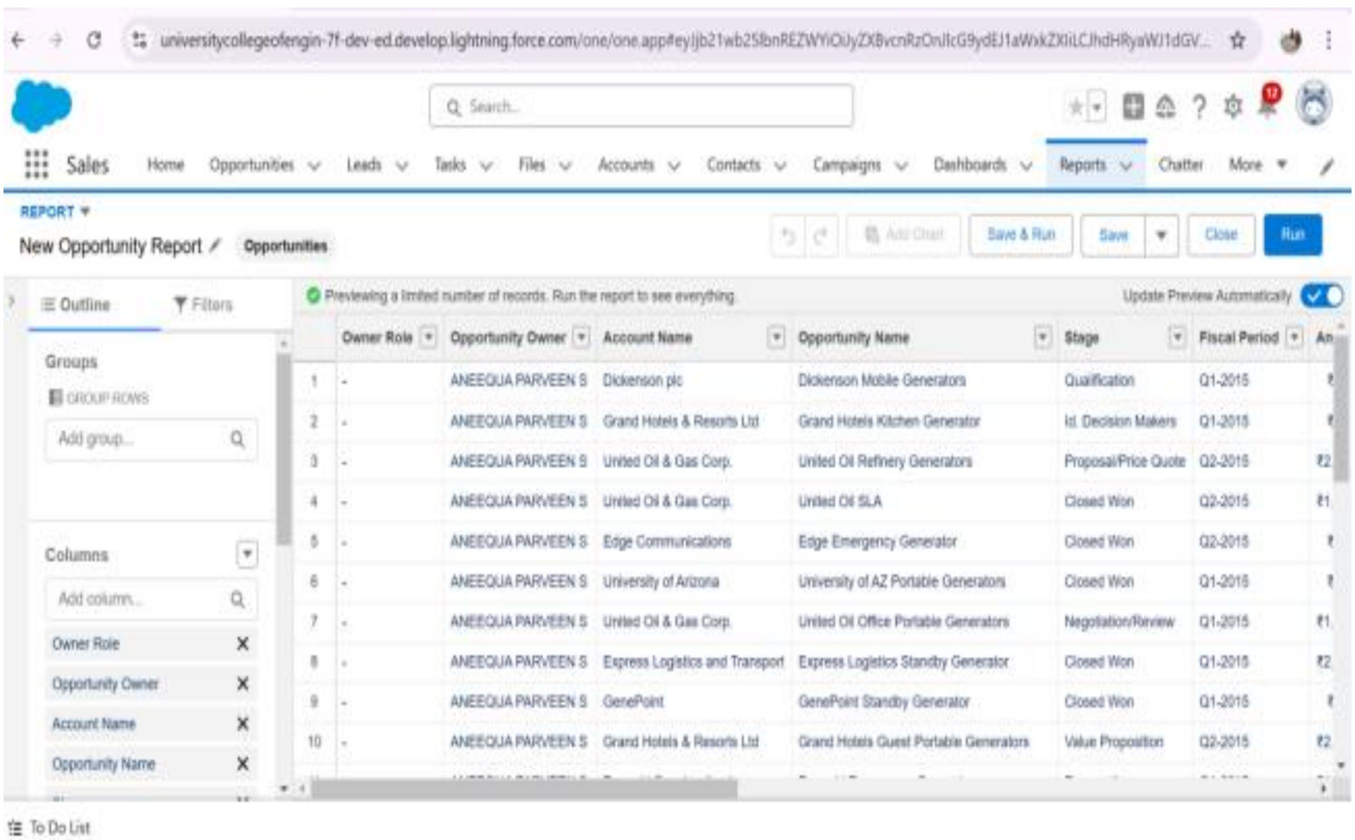


Figure-28



8. Conclusion

This CRM application for automobile sales successfully streamlined client relationship management, sales tracking, and customer communication. Sales-force extensive CRM capabilities provide an efficient, data driven solution for managing customer relationships and overseeing the automobile sales process.