

PROJECT REPORT ON

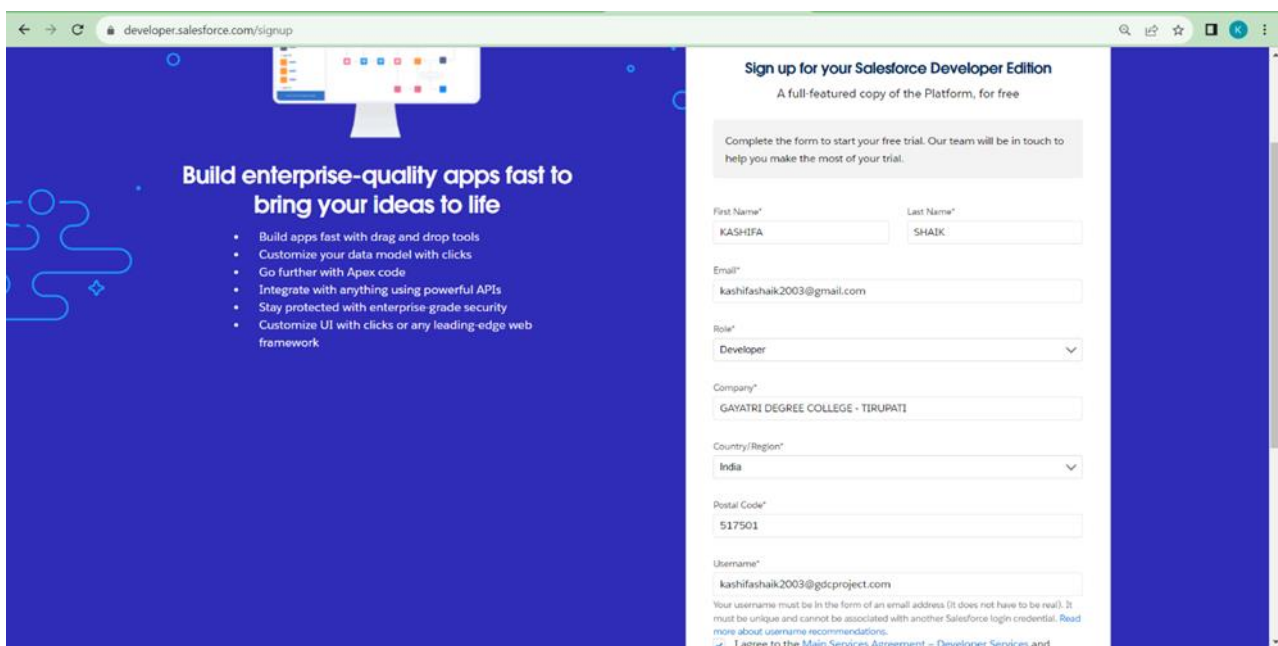
SALES AUTOMOBILE USING SALESFORCE CRM

Introduction:

The Salesforce CRM implementation for automobile sales streamlines the entire sales process, enhancing efficiency and customer satisfaction. Through this system, sales teams can manage leads, track customer interactions, and automate follow-ups. It enables comprehensive customer profiling, allowing for personalized marketing strategies and targeted campaigns. The platform facilitates inventory management, ensuring real-time updates on available vehicles and their specifications. Integration with marketing tools enables seamless communication and lead nurturing. Additionally, the system provides insightful analytics, empowering decision-making by identifying sales trends and forecasting demand. Overall, the Salesforce CRM for automobile sales optimizes operations, fosters customer relationships, and drives revenue growth within the automotive industry.

Milestone 01 - Creating Developer Org

- ❖ Go to developer.salesforce.com
- ❖ Click on sign up.
- ❖ On the sign up form, enter the following details
- ❖ First name & Last name – KASHIFA SHAIK
- ❖ Email – kashifashaik2003@gmail.com
- ❖ Role – SALESFORCE DEVELOPER
- ❖ Company – GAYATRI DEGREE COLLEGE – TIRUPATI
- ❖ Country - India
- ❖ Postal Code – pin code 517501
- ❖ Username – kashifashaik2003@gdcproject.com



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First Name* KASHIFA Last Name* SHAIK

Email* kashifashaik2003@gmail.com

Role* Developer

Company* GAYATRI DEGREE COLLEGE - TIRUPATI

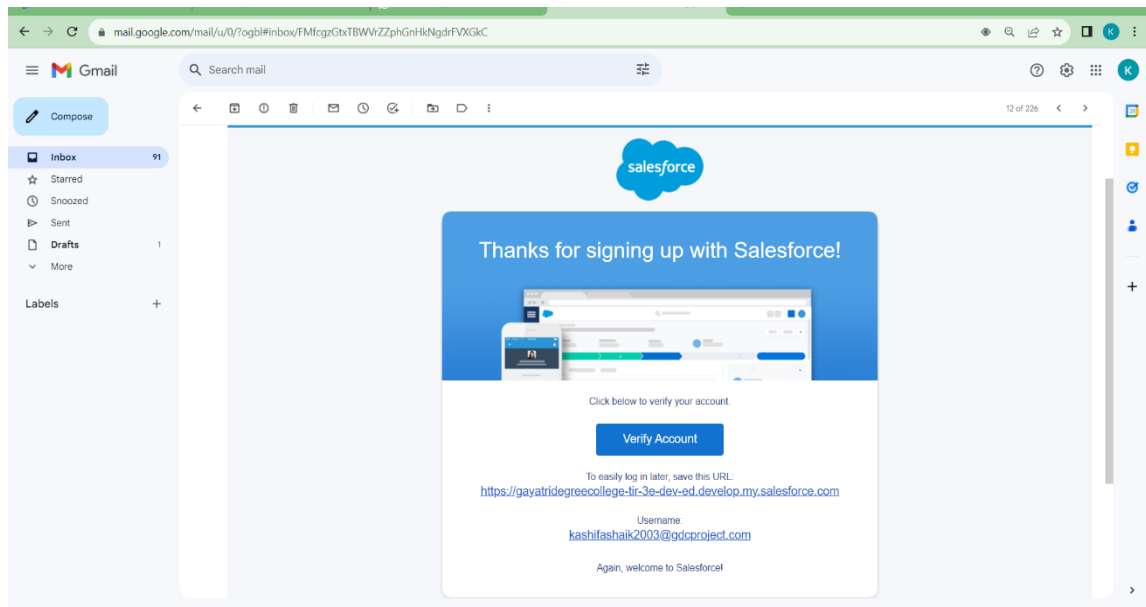
Country/Region* India

Postal Code* 517501

Username* kashifashaik2003@gdcproject.com

Your username must be in the form of an email address. (It does not have to be real). It must be unique and cannot be associated with another Salesforce login credential. [Read more about username recommendations.](#)

☒ I agree to the Main Services Agreement – Developer Services and




Milestone 02 - Creation of Object

➤ Create Automobile Information Object:

1. Download and open this spreadsheet, save it as AutomobileInformation.csv.
2. Make sure to download the File into CSV format.

Note: Make sure to have the name of the file as "Automobile Information".

Log into your salesforce account, click , then select Setup.

3. Click the Object Manager tab.
4. Click Create.
5. Select Custom Object from Spreadsheet.
6. Click Login With Salesforce.
7. Enter your Salesforce account username and password. (which you have created in the Milestone 1, Activity 1)
8. Click Log In.
9. Click Allow.
10. Click Upload.
11. Navigate to the Automobile Information.csv file you downloaded and upload it. Salesforce automatically detects the fields and populates all its record data. Choose the Record Name field and make sure all fields are with the proper datatypes as below as they are.
12. Click Next and enter the following settings.
13. Click Finish. The Automobile Information object is successfully created and data imported, all within minutes.

➤ 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.

➤ Create Automobile Object:

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

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
 - Enter the label name - Opportunity Automobile
 - Plural label name - Opportunity Automobiles

- Record Name - Opportunity Automobile Id
- Data Type - Auto Number
- Display Format - OA-{0000}
- Starting Number - 1

2. Click on Allow reports.
3. Allow search
4. Save

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main content area displays a table of objects with columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The table lists several custom objects, including 'Invoice - Invoice', 'Opportunity Automobile', 'Automobile Information', 'Parent', 'Student', and 'School'. The 'Opportunity Automobile' object is highlighted.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Invoice - Invoice	Invoice_Invoice__c	Custom Object		14/04/2024	✓
Opportunity Automobile	Opportunity_Automobile__c	Custom Object		14/04/2024	✓
Automobile Information	Automobile_Information__c	Custom Object		14/04/2024	✓
Parent	Parent__c	Custom Object		07/10/2023	✓
Student	Student__c	Custom Object		07/10/2023	✓
School	School__c	Custom Object		07/10/2023	✓
Work Type Group Member	WorkTypeGroupMember	Standard Object			
Work Type Group	WorkTypeGroup	Standard Object			
Work Type	WorkType	Standard Object			
Work Step Template	WorkStepTemplate	Standard Object			

Milestone 03 – Tabs

➤ Creating A Custom 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.

The screenshot shows the 'Custom Tabs' configuration page in Salesforce. The left sidebar shows the 'Setup' menu with 'User Interface' expanded and 'Tabs' selected. The main content area is titled 'Custom Tabs' and includes a 'New' button. Below the title, there is a table of custom object tabs with columns: Action, Label, Tab Style, and Description. The table lists several tabs, including 'Automobile Information', 'Invoice - Invoice', 'Opportunity Automobiles', 'Parents', 'Schools', and 'Students'.

Action	Label	Tab Style	Description
Edit Del	Automobile Information	Box	
Edit Del	Invoice - Invoice	Box	
Edit Del	Opportunity Automobiles	Shield	
Edit Del	Parents	Compass	
Edit Del	Schools	Castle	
Edit Del	Students	Pencil	

Milestone 04 - The Lightning App

➤ 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
 - a) App Name :Sales Automobile Using Salesforce CRM
 - b) Developer Name : this will auto populated
 - c) Description : Give a meaningful description
 - d) Image : optional (if you want to give any image you can otherwise not mandatory)
 - e) 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.
- 5) 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.
- 6) Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.

	App Name	Developer Name	Description	Last Modified	App...	Vi..
1	Sales Automobile Using Salesforce CRM	Sales_Automobile_Usin...	The Salesforce CRM implementation for automobile sales streamlines the entire sales pr...	14/04/2024, 2:31 pm	Lightning	
2	Commerce	Commerce	Manage your store's products, catalogs, and pricebooks.	27/03/2024, 9:23 pm	Lightning	
3	School Management	School_Management		07/10/2023, 8:49 pm	Lightning	
4	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	05/10/2023, 7:26 pm	Lightning	
5	Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	05/10/2023, 7:26 pm	Lightning	
6	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	05/10/2023, 7:24 pm	Lightning	
7	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	05/10/2023, 7:24 pm	Classic	
8	Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	05/10/2023, 7:24 pm	Lightning	
9	Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	05/10/2023, 7:24 pm	Lightning	
10	Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across customer s...	05/10/2023, 7:24 pm	Lightning	
11	Content	Content	Salesforce CRM Content	05/10/2023, 7:24 pm	Classic	
12	Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	05/10/2023, 7:24 pm	Classic	

Milestone 05 - Fields & Relationships

➤ Creating Opportunity Master Detail Relationship Field In Opportunity AutoMobile Object:

1. 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. Go Select Data type as “Master Details Relationship
4. Click on Next

5. Fill the above as following:
 - Field Label: gets auto Generated(Opportunity)
 - Field Name : gets auto generated(Opportunity)
 - Click on Next >> Next >> Save and new.

➤ **Creating The AutoMobile Information Lookup 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 “Lookup RelationShip”.
4. Click on Next
5. Fill the above as following:
 - a. Field Label: Automobile
 - b. Field Name : Automobile
6. Click on Next >> Next>> Save and new.

➤ **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.
4. Field Label >> Quantity
5. Field Name >> Quantity
6. Check that Required Check box.
7. Click Next >> Next >> Save & New.

➤ **Creating Formula 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 “Formula” and click Next.
4. 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.
5. Under Advanced Formula write down the formula : Automobile__r.Price__c
6. click “Check Syntax” and Next >> Next >> Save & New.

➤ **Creating The Formula 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 “Formula” and click Next.
4. 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.
5. Under Advanced Formula write down the formula : Unit_Price__c * Quantity__c
6. click “Check Syntax” and Next >> Next >> Save.

Setup
Home
Object Manager

Opportunity Automobile

Details
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

8 Items, Sorted by Field Label
New
Deleted Fields
Field Dependencies
Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Automobile	Automobile__c	Lookup(Automobile Information)		✓	▼
Created By	CreatedById	Lookup(User)			
Last Modified By	LastModifiedById	Lookup(User)			
Opportunity	Opportunity__c	Master-Detail(Opportunity)		✓	▼
Opportunity Automobile Id	Name	Auto Number		✓	▼
Quantity	Quantity__c	Number(18, 0)			▼
Total Price	Total_Price__c	Formula (Currency)			▼
Unit Price	Unit_Price__c	Formula (Currency)			▼

➤ **Updating Field In Invoice Object:**

- Go to setup ? click on Object Manager ? type object name(Invoice) in quick find bar? click on the object.
- Now click on “Fields & Relationships” , Click on the edit of Invoice Id field.
- Select Data type as “Auto Number ” and click Next.
 - Display Format :- I-{0000}
 - StartingNumber:- 1
- Click Save.

➤ **Creating Remaining Fields In Objects:**

Now create the remaining fields using the data types mentioned.

	Object name	Fields	
1	Invoice	Field Name	Opportunity
		Data type	Master Detail relationship Object : Opportunity

Fields & Relationships
8 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Invoice ID	Name	Auto Number		✓
Last Modified By	LastModifiedById	Lookup(User)		
Opportunity	Opportunity__c	Master-Detail(Opportunity)		✓
Purchase Date	Purchase_Date__c	Date		
Quantity	Quantity__c	Number(18, 0)		
Total Price	Total_Price__c	Number(18, 0)		
Unit Price	Unit_Price__c	Number(18, 0)		

Milestone 06- Page Layouts

➤ Edit The Page Layout For Opportunity Object:

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

Opportunity

Save Quick Save Preview As... Cancel Undo Redo Layout Properties

Fields

Section	Field Name	Field Type	Field Properties
Contract	Close Date	Close Date	
Contract	Description	Description	
Contract	Expected Revenue	Expected Revenue	
Contract	Main Competitor(s)	Main Competitor(s)	
Contract	Forecast Category	Forecast Category	
Contract	Next Step	Next Step	
Contract	Price Book	Price Book	
Contract	Quantity	Quantity	

Salesforce Mobile and Lightning Experience Actions

Invoices Post File New Task Log a Call New Case New Note New Event Link Poll Question Email Change Record Type Clone

Submit for Approval Delete Edit Change Owner Sharing

Opportunity Detail

Standard Buttons: Edit Delete Clone Change Owner Change Record Type Sharing Sharing Hierarchy Printable View Start Conversation Link a Slack Channel Schedule Test Drive Add to Cadence Add to an Actionable List Create Summary

Custom Buttons

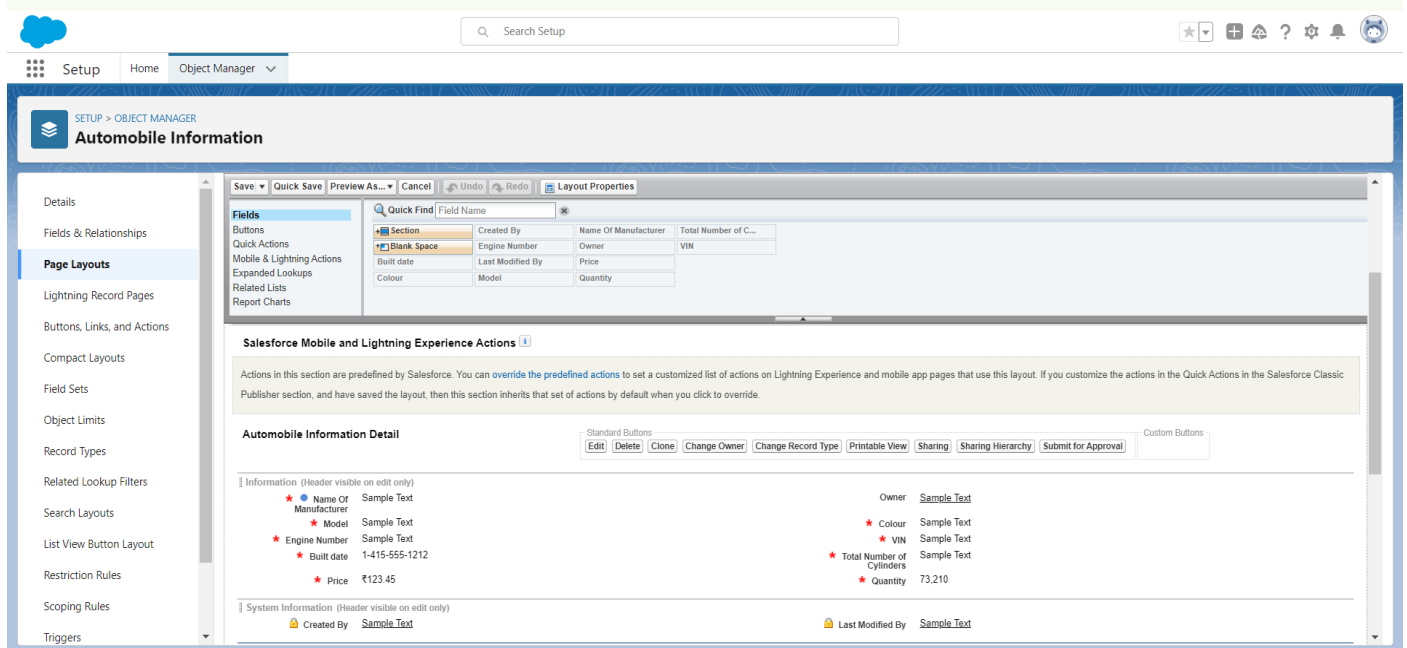
Opportunity Information (Header visible on edit only)

Field Name	Field Type	Field Properties
Opportunity Owner	Private	
Opportunity Name	Sample Text	
Account Name	Sample Text	
Account Name	Type	
Lead Source	Sample Text	
Amount	₹123.45	
Expected Revenue	₹123.45	
Close Date	18/04/2024	
Next Step	Sample Text	
Stage	Sample Text	
Probability (%)	224%	
Primary Campaign Source	Sample Text	

➤ Edit The Page Layout For Automobiles Information:

1. Go to Setup >> Click on Object Manager >> On the search bar, select Automobile Information. You can notice Page Layouts on the left panel
2. Click on Page Layouts. Click on 'Automobile Information Layout'.

3. 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.
4. Adjust the Fields as given below for A good looking view.
5. Click on Save.



Milestone 07- Apex Trigger

➤ Opportunity Automobile Quantity:

UseCase : Whenever Opportunity Closed won Than Neglect / Minus the Quantity From Automobile Information on the Bases of Opportunity Automobile quantity.

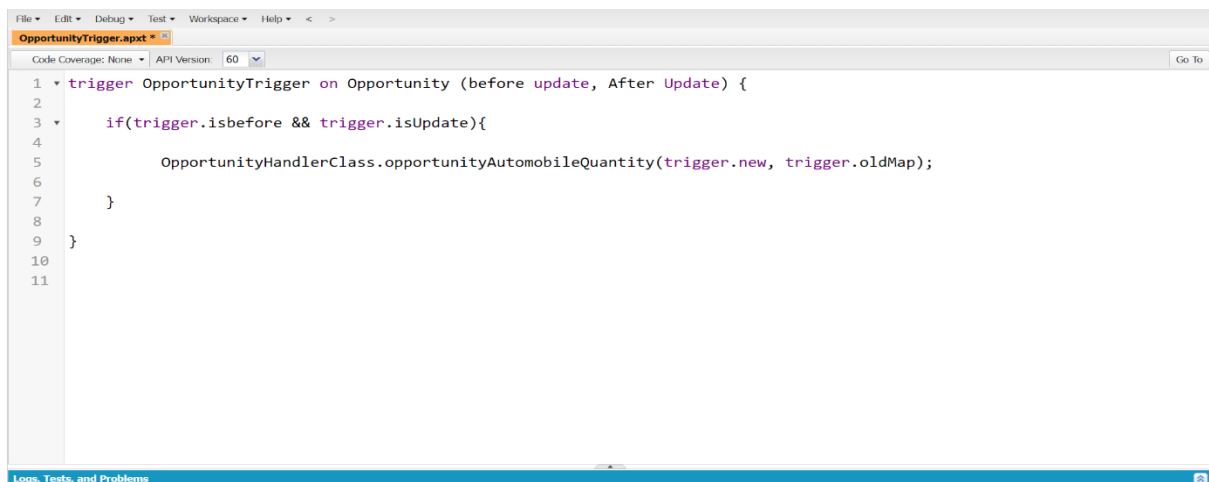
1. Login to the respective trailhead account and navigate to the gear icon in the top right corner.
2. Click on the Developer console. Now you will see a new console window.
3. In the toolbar, you can see FILE. Click on it and navigate to new and create New apex class.
4. Name the class as “OpportunityHandlerClass”.



Trigger Handler :

How to create a new trigger :

1. While still in the account, navigate to the gear icon in the top right corner.
2. Click on developer console and you will be navigated to a new console window.
3. Click on the File menu in the toolbar, and click on new? Trigger.
4. Enter the trigger name and the object to be triggered.
5. Name : OpportunityTrigger
6. sObject : Opportunity

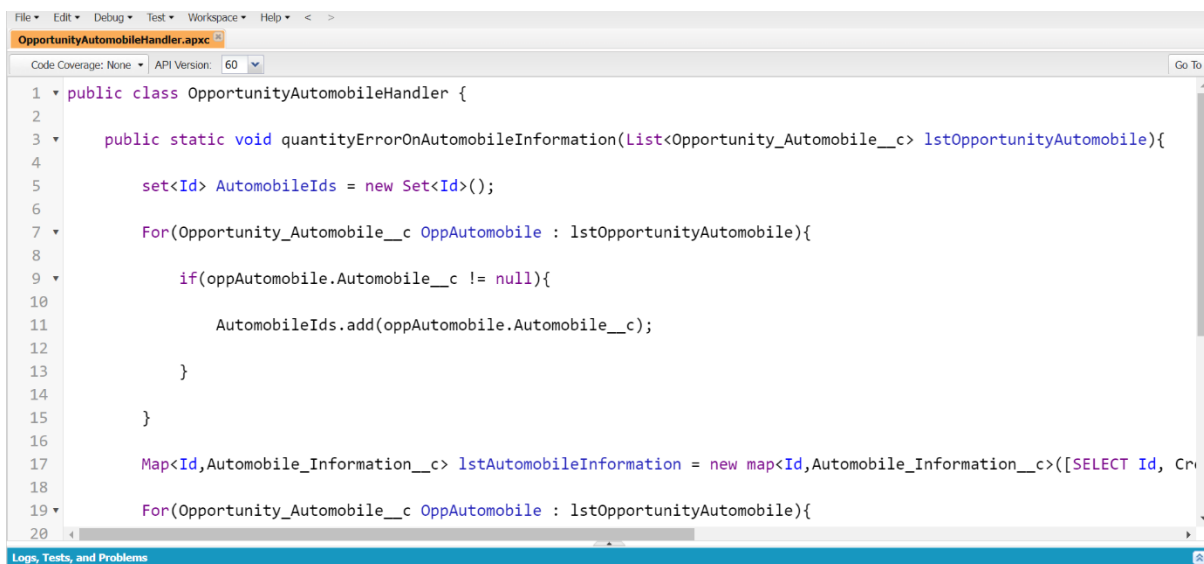


```
1 trigger OpportunityTrigger on Opportunity (before update, After Update) {
2
3     if(trigger.isbefore && trigger.isUpdate){
4
5         OpportunityHandlerClass.opportunityAutomobileQuantity(trigger.new, trigger.oldMap);
6
7     }
8
9 }
10
11
```

➤ Opportunity-Automobile Error:

UseCase : If Quantity of Automobile is Zero or Less than The Quantity from The Opportunity-Automobile Than Throw an error .

1. Login to the respective trailhead 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 “OpportunityAutomobileHandler”.



```
1 public class OpportunityAutomobileHandler {
2
3     public static void quantityErrorOnAutomobileInformation(List<Opportunity_Automobile__c> lstOpportunityAutomobile){
4
5         set<Id> AutomobileIds = new Set<Id>();
6
7         For(Opportunity_Automobile__c OppAutomobile : lstOpportunityAutomobile){
8
9             if(oppAutomobile.Automobile__c != null){
10
11                 AutomobileIds.add(oppAutomobile.Automobile__c);
12
13             }
14
15         }
16
17         Map<Id, Automobile_Information__c> lstAutomobileInformation = new map<Id, Automobile_Information__c>([SELECT Id, Cr
18
19         For(Opportunity_Automobile__c OppAutomobile : lstOpportunityAutomobile){
20

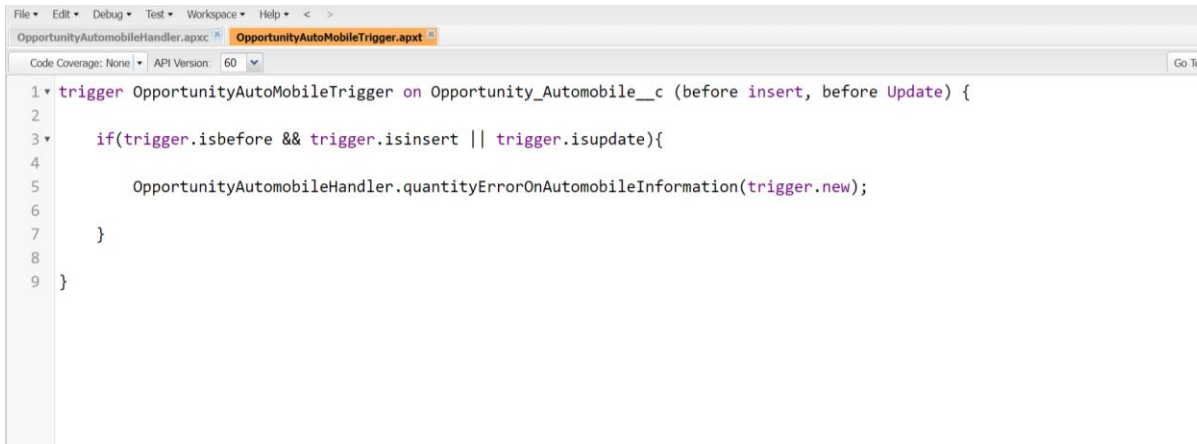
```

Trigger Handler :

How to create a new trigger :

1. While still in the trailhead account, navigate to the gear icon in the top right corner.

2. Click on developer console and you will be navigated to a new console window.
3. Click on the File menu in the toolbar, and click on new Trigger.
4. Enter the trigger name and the object to be triggered.
5. Name : OpportunityAutoMobileTrigger
6. sObject : Opportunity_Automobile__c



```

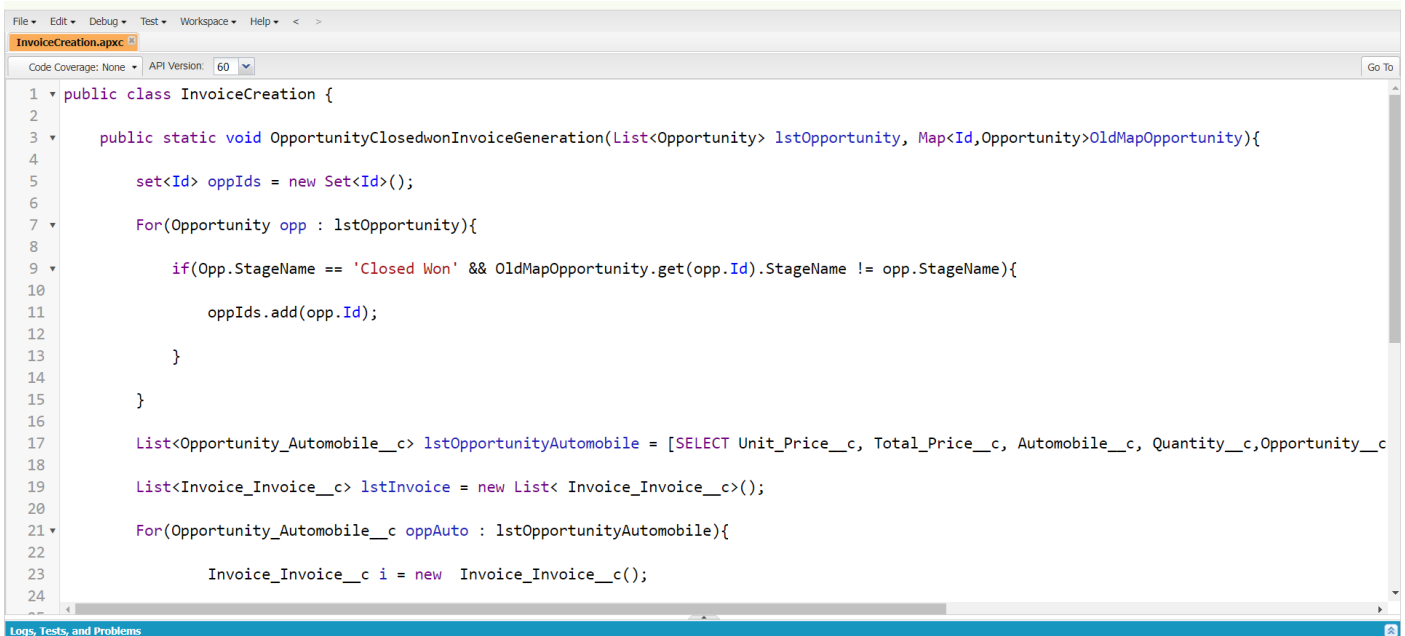
File Edit Debug Test Workspace Help < >
OpportunityAutomobileHandler.apxc OpportunityAutoMobileTrigger.apxt
Code Coverage: None API Version: 60 Go To

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

➤ Invoice Creation Trigger:

UseCase : Whenever an opportunity is Closed won then create the Invoice on the Bases of Opportunity Automobile Data.

1. Login to the respective trailhead 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 “InvoiceCreation”.



```

File Edit Debug Test Workspace Help < >
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_Invoice__c> lstInvoice = new List< Invoice_Invoice__c>();
20
21         For(Opportunity_Automobile__c oppAuto : lstOpportunityAutomobile){
22
23             Invoice_Invoice__c i = new Invoice_Invoice__c();
24
  
```

Trigger Handler :

For this class we don't need to create any trigger, we will call this Code in “Opportunity Trigger”.

1. Go on files and click on open.
2. Click on triggers.
3. Double click on OpportunityTrigger.

```

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  }

```

➤ Check Contact Role:

UseCase : Whenever an opportunity is Going to Closed won then check it has the contact role or Not.

1. Login to the respective trailhead 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 “ContactRoleCheck”.

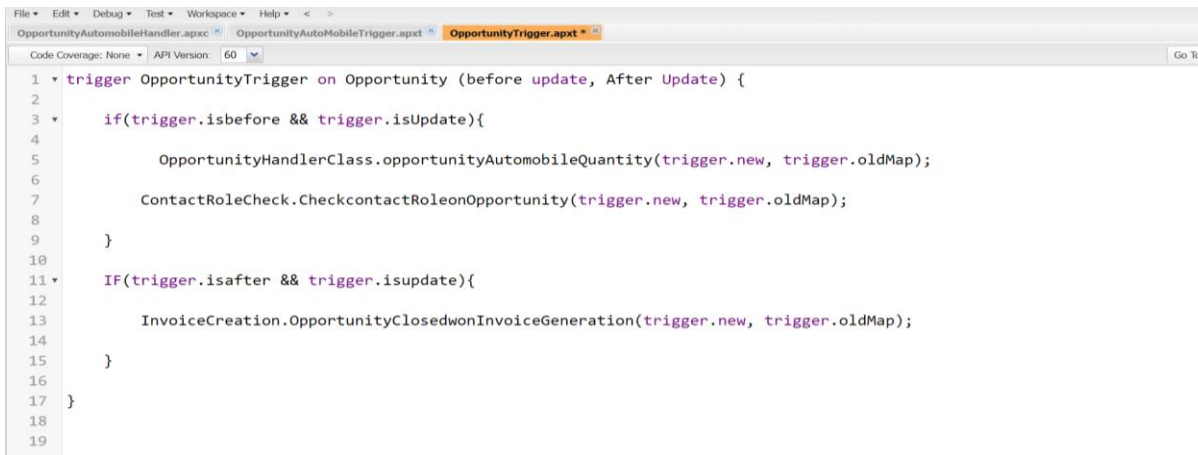
```

1  public class ContactRoleCheck {
2
3      public static void CheckcontactRoleonOpportunity(List<Opportunity> lstOpportunity, Map<Id,Opportunity>OldMapOpportunity){
4
5          List<OpportunityContactRole> lstContactRole = [SELECT Id From OpportunityContactRole WHERE OpportunityId IN: OldMapOpportunity.Id];
6
7          For(Opportunity opp : lstOpportunity){
8
9              if(opp.StageName == 'Closed Won' && OldMapOpportunity.get(opp.Id).StageName != opp.StageName){
10
11                  If(lstContactRole.isEmpty()){
12
13                      opp.adderror('Please add contact Role on opportunity whenever Opportunity is Going to Closed Won.');

```

Trigger Handler :For this class we don’t need to create any trigger, we will call this Code in “Opportunity Trigger”.

1. Go on files and click on open.
2. Click on triggers.
3. Double click on OpportunityTrigger.

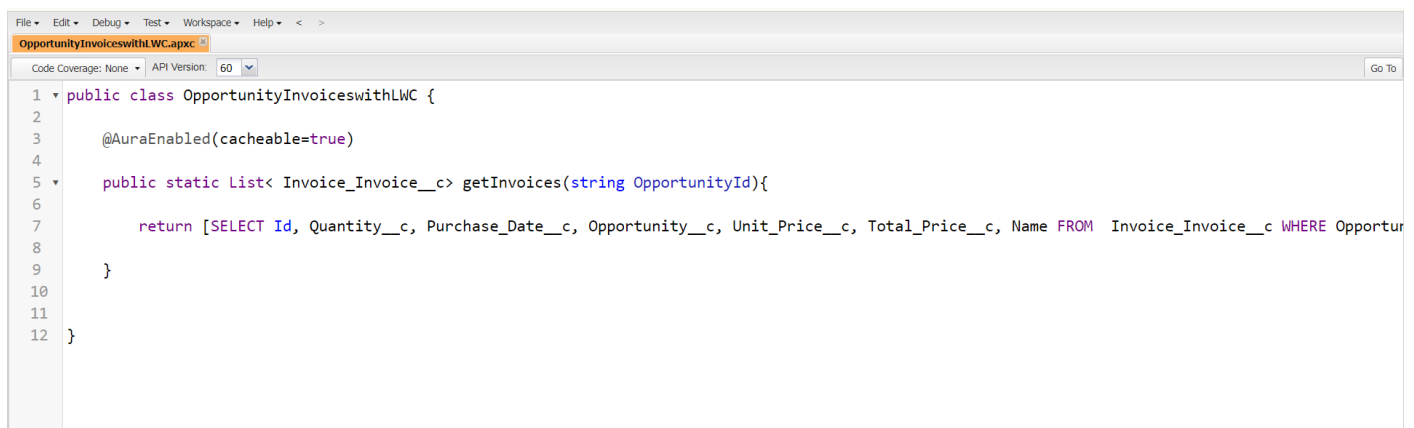


```
1 trigger OpportunityTrigger on Opportunity (before update, After Update) {
2
3     if(trigger.isbefore && trigger.isupdate){
4
5         OpportunityHandlerClass.opportunityAutomobileQuantity(trigger.new, trigger.oldMap);
6
7         ContactRoleCheck.CheckcontactRoleonOpportunity(trigger.new, trigger.oldMap);
8
9     }
10
11     IF(trigger.isafter && trigger.isupdate){
12
13         InvoiceCreation.OpportunityClosedwonInvoiceGeneration(trigger.new, trigger.oldMap);
14
15     }
16
17 }
18
19
```

Milestone 08 - LWC Component

➤ Create Apex Class To Get Invoices

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



```
1 public class OpportunityInvoiceswithLWC {
2
3     @AuraEnabled(cacheable=true)
4
5     public static List< Invoice_Invoice__c> getInvoices(string OpportunityId){
6
7         return [SELECT Id, Quantity__c, Purchase_Date__c, Opportunity__c, Unit_Price__c, Total_Price__c, Name FROM Invoice_Invoice__c WHERE Opportunity__c = :OpportunityId];
8
9     }
10
11
12 }
```

➤ 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.

➤ 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.

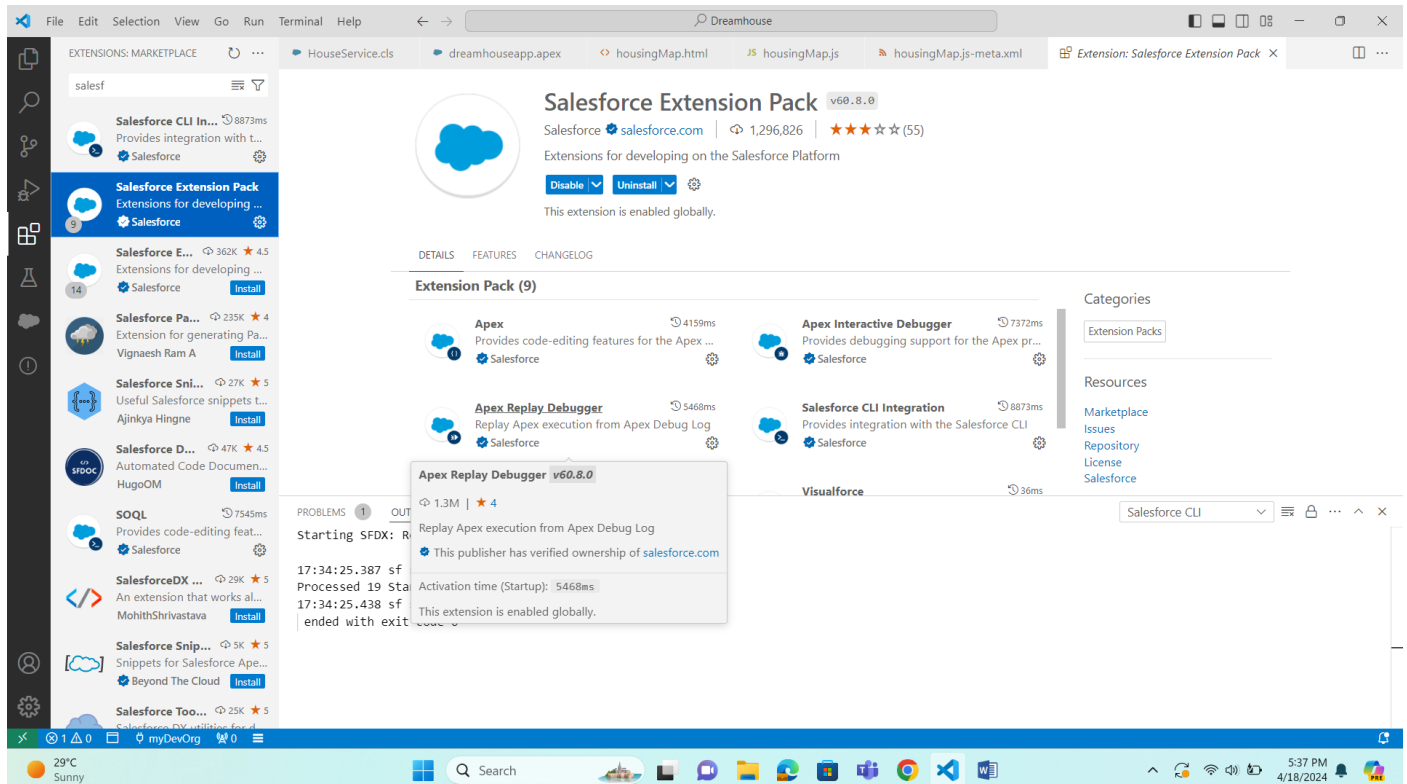
The following instructions are for Windows OS. Other operating systems may have slightly different steps.

➤ Install The Salesforce Extension Pack:

In the VS Code,

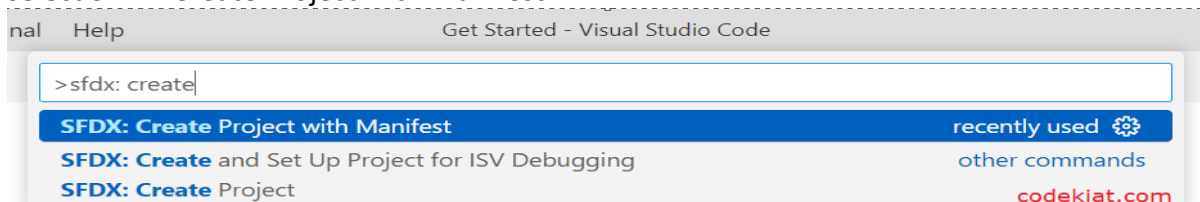
1. go to extensions (1) as shown in the image below.
2. Search with the Salesforce extension pack (2) as shown in the image below.
3. select Salesforce Extension Pack from the list (3) as shown in the image below.
4. Click the Install button (4) as shown in the image below.

The extension pack is installed successfully

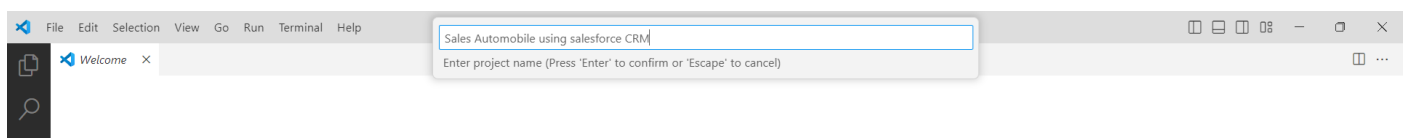


➤ Create A Project In VS Code:

1. Press CTRL + SHIFT + P, type sfdx: create
2. select SFDX: Create Project with Manifest



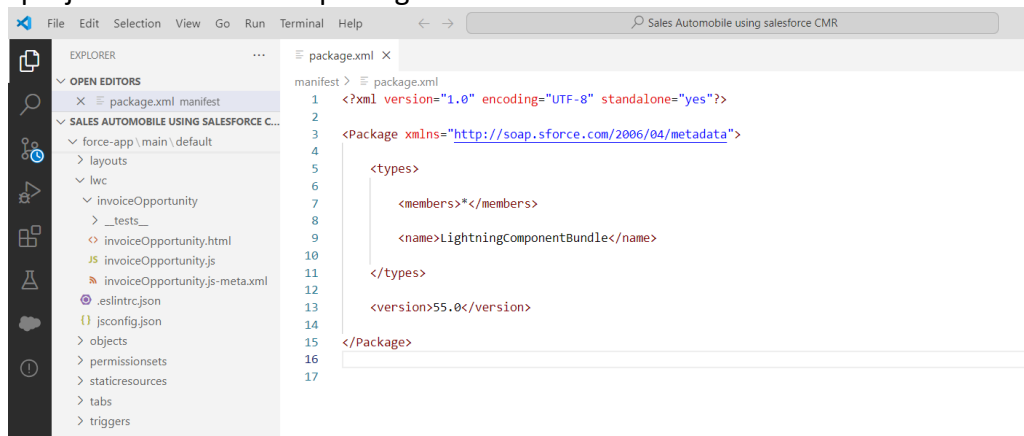
3. Select the Standard project template



4.Type a project name and Click Enter.

5.Select the folder (create a new folder if required) and click Create Project.

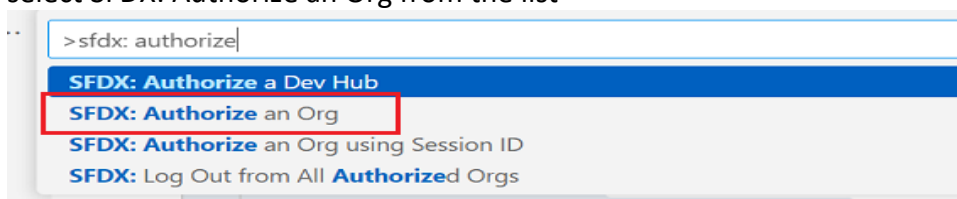
6.The new project is created with package.xml



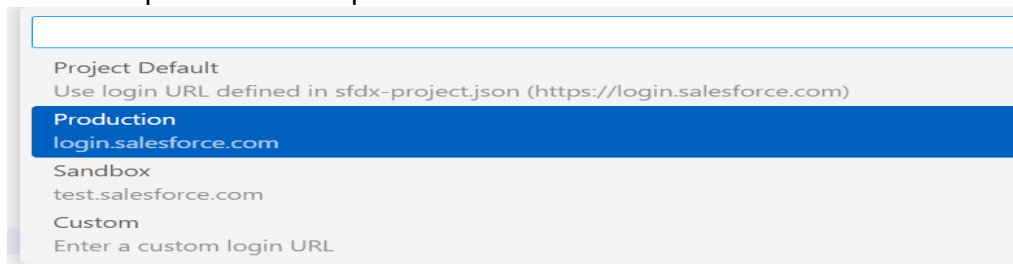
➤ Authorize An Org:

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

1. Press CTRL + SHIFT + P, type sfdx: authorize.
2. select SFDX: Authorize an Org from the list

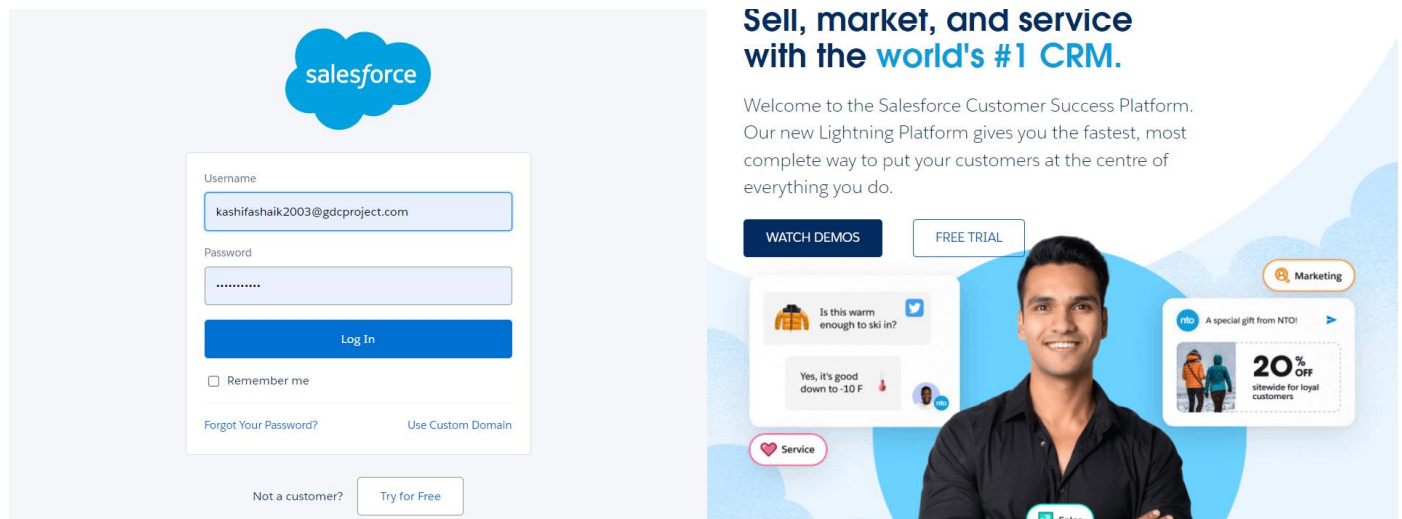


3. Choose your Salesforce instance.
For developer edition and production instances select Production.



5.Give a project name and press Enter

6.The Salesforce login page opens in the browser.



7. Enter the credentials and click Log In

8. It will be successfully authorized.

➤ Create Lightning Web Component:

XML File :

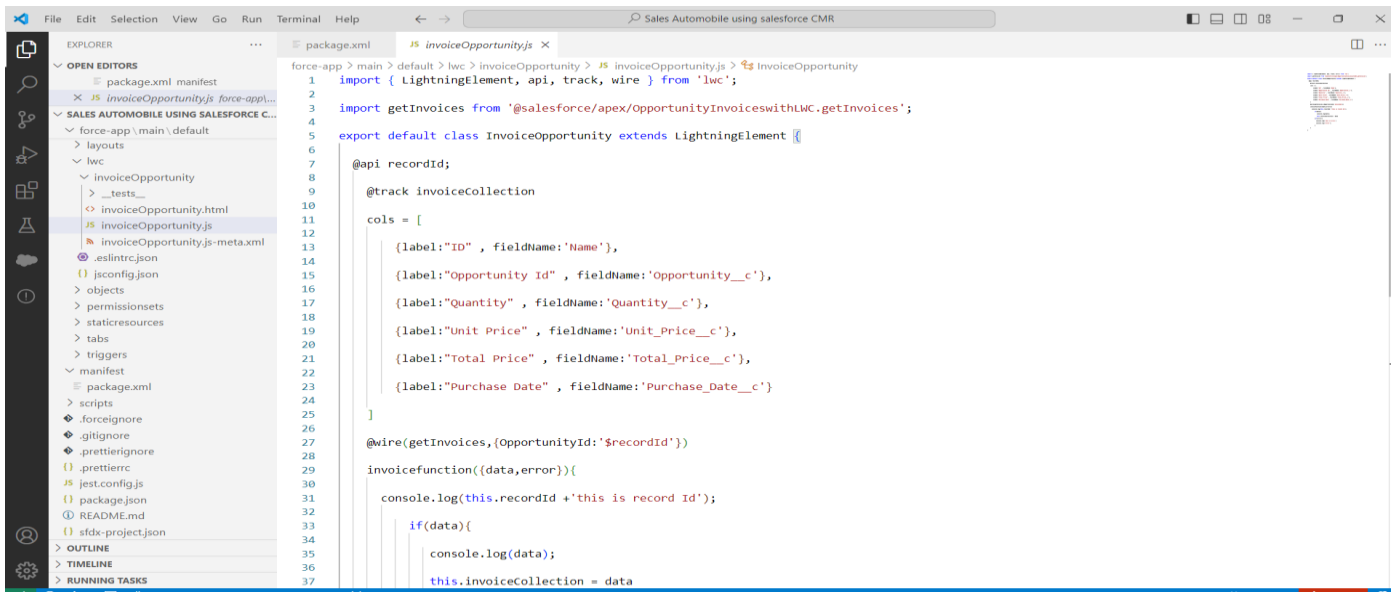
1. In the VS Code, press CTRL + SHIFT + P, type sfdx: create lightning in the search bar, and select SFDX: Create Lightning Web Component.
2. Give the name "InvoiceOpportunity" and press Enter.
3. Choose the directory.
4. LWC is created successfully.
5. Copy and paste the below-mentioned code in the InvoiceOpportunity.js-meta.xml and update the apiVersion tag with the latest API version.

```

1  <?xml version="1.0" encoding="UTF-8"?>
2
3  <LightningComponentBundle xmlns="http://soap.sforce.com/2006/04/metadata">
4
5      <apiVersion>58.0</apiVersion>
6
7      <isExposed>true</isExposed>
8
9      <targets>
10
11          <target>lightning__RecordAction</target>
12
13          <target>lightning__RecordPage</target>
14
15      </targets>
16
17  </LightningComponentBundle>
  
```

JS File :

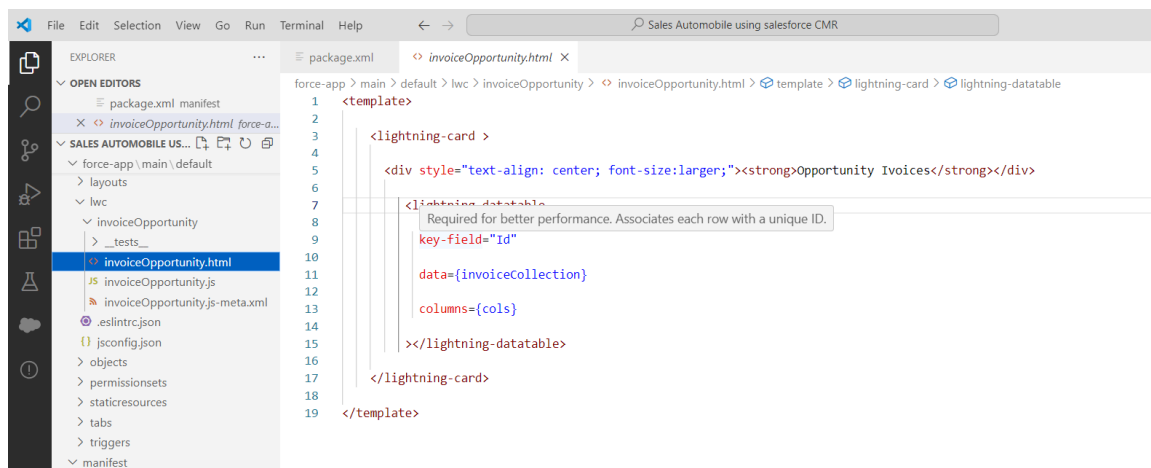
1. Copy and paste the below-mentioned code in the InvoiceOpportunity.js and update the apiVersion tag with the latest API version.



```
1 import { LightningElement, api, track, wire } from 'lwc';
2
3 import getInvoices from '@salesforce/apex/OpportunityInvoicesWithLWC.getInvoices';
4
5 export default class InvoiceOpportunity extends LightningElement {
6
7     @api recordId;
8
9     @track invoiceCollection
10
11     cols = [
12         {label:'ID' , fieldName:'Name'},
13         {label:'Opportunity Id' , fieldName:'Opportunity__c'},
14         {label:'Quantity' , fieldName:'Quantity__c'},
15         {label:'Unit Price' , fieldName:'Unit_Price__c'},
16         {label:'Total Price' , fieldName:'Total_Price__c'},
17         {label:'Purchase Date' , fieldName:'Purchase_Date__c'}
18     ]
19
20     @wire(getInvoices,{OpportunityId:$recordId})
21
22     invoicefunction((data,error)){
23         console.log(this.recordId +'this is record Id');
24
25         if(data){
26             console.log(data);
27             this.invoiceCollection = data
28         }
29     }
30 }
```

HTML File :

- Copy and paste the below-mentioned code in the InvoiceOpportunity.html and update the apiVersion tag with the latest API version.



```
1 <template>
2
3     <lightning-card >
4
5         <div style="text-align: center; font-size:larger;"><strong>Opportunity Ivoices</strong></div>
6
7         <lightning-datatable
8             key-field="Id"
9             data={invoiceCollection}
10            columns={cols}>
11
12         </lightning-datatable>
13     </lightning-card>
14 </template>
```

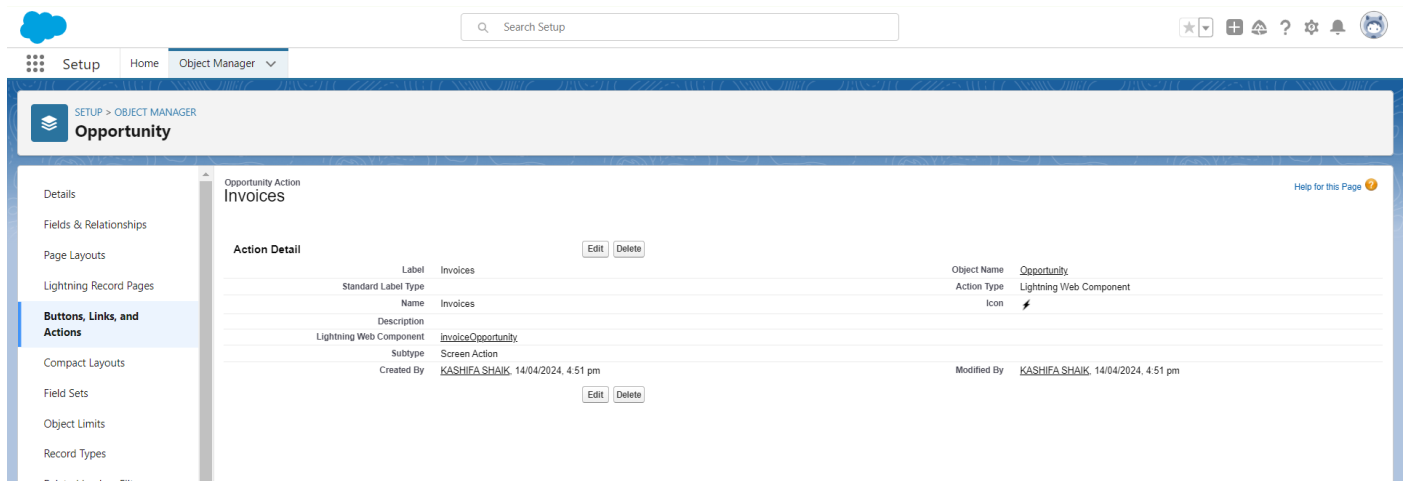
Deploy Component:

1. Right-click on the component folder, and select SFDX: Deploy Source to Org to deploy the component to the org.
2. Once the deployment is complete, you will see the below-highlighted message in the output tab

➤ Create Button To Add On Opportunity:

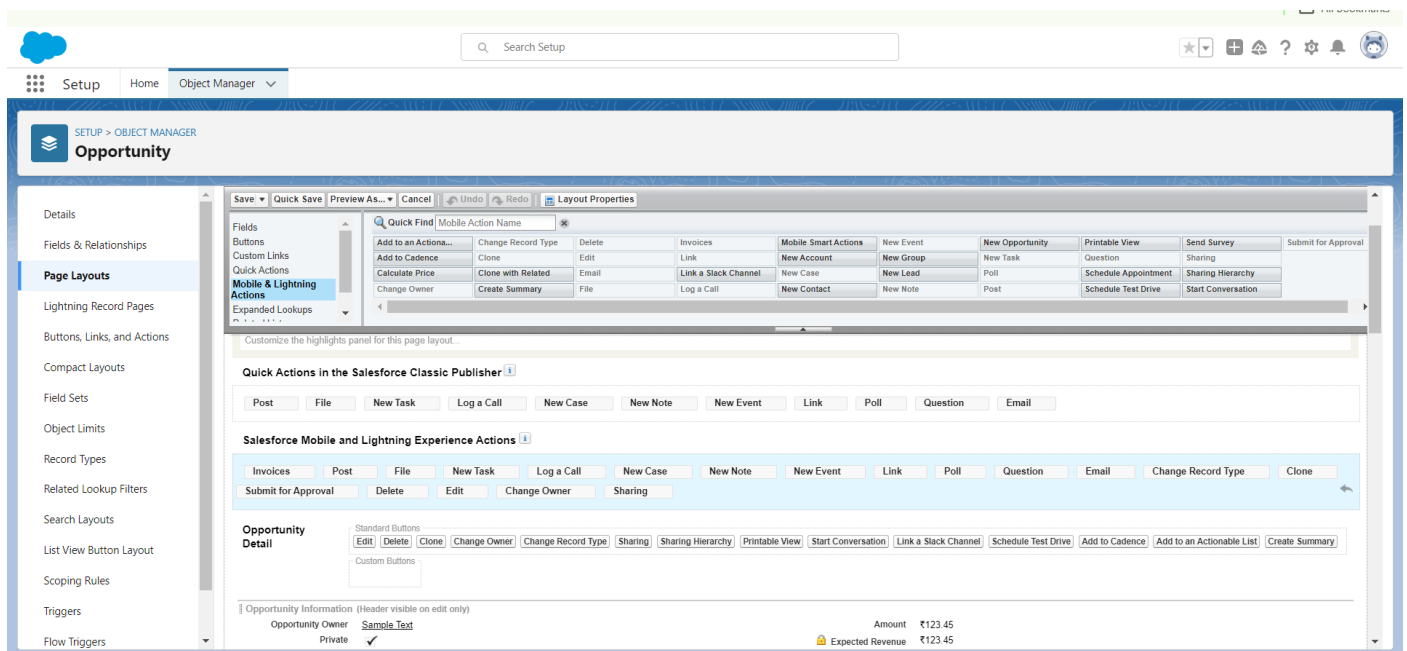
1. To add the newly created component to the view, Go to Salesforce Setup
2. Click on Object Manager
3. Search Opportunity and Click on it .

4. click on Button Links and Action.
5. click on the New Action.



➤ Add InvoiceOpportunity Into Opportunity Record Page:

1. On Opportunity Object Manager Click on Page layout.
2. Click on OpportunityLayout.
3. Click on Mobile And Lightning Action as show on below Image
4. Search for invoice on Quick Find.
5. Drag and Drop the Invoice into Salesforce Mobile and Lightning Experience Actions.
6. Click on Save.



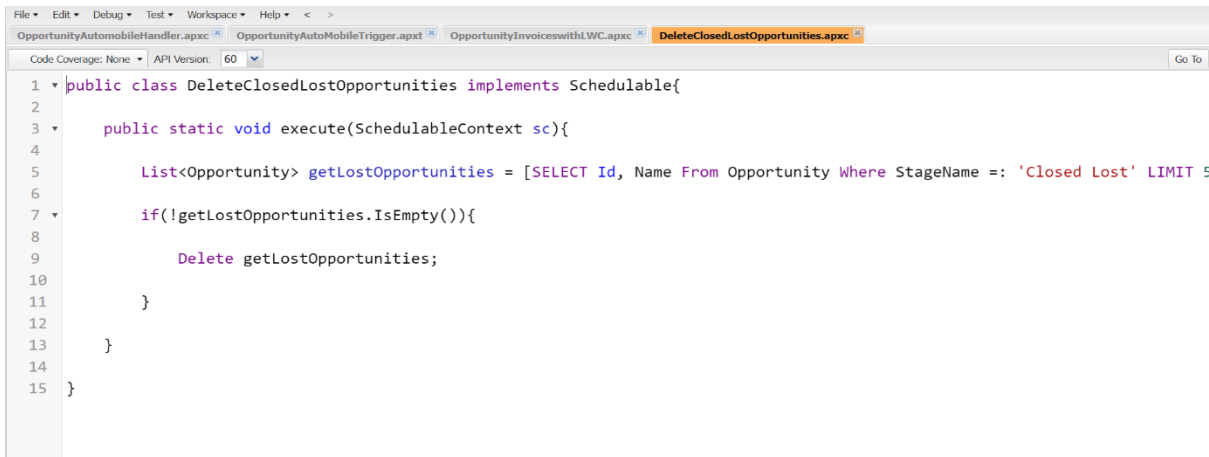
Milestone 09 - Apex Schedulers:

➤ 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 ”



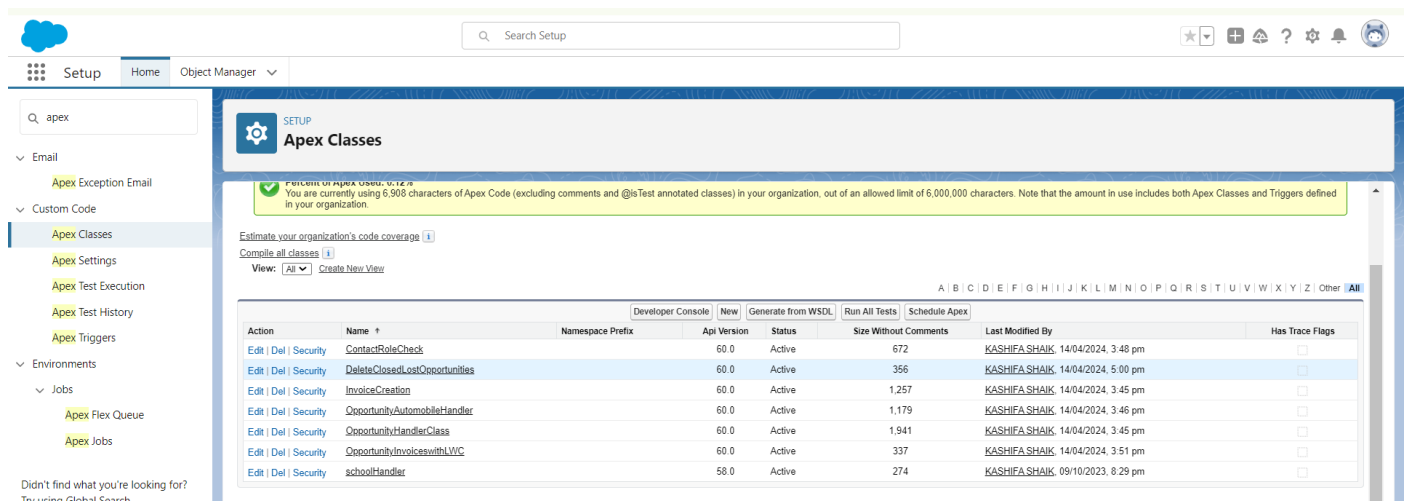
```

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 5];
6
7         if(!getLostOpportunities.IsEmpty()){
8
9             Delete getLostOpportunities;
10
11         }
12     }
13 }
14
15 }

```

Schedule the Apex class:

1. Go to the Home page in your salesforce account.
2. In the search bar, enter Apex and click on Apex Classes.
3. Click on Schedule Apex and enter the Job name.
 - a. Job Name : DeleteOpportunitySchedule
4. Now click on the search icon present near the Apex class : Goto the Lookup icon click on it and select DeleteClosedLostOpportunities.
5. In the Schedule Apex section , select weekly and select Monday mentioned and preferred time as 10:00 AM.
6. Click on Save. Now enter Apex in the search box and select Apex jobs.



Action	Name	Namespace Prefix	Api Version	Status	Size Without Comments	Last Modified By	Has Trace Flags
Edit Del Security	ContactRoleCheck		60.0	Active	672	KASHIFA SHAIK 14/04/2024, 3:48 pm	<input type="checkbox"/>
Edit Del Security	DeleteClosedLostOpportunities		60.0	Active	356	KASHIFA SHAIK 14/04/2024, 5:00 pm	<input type="checkbox"/>
Edit Del Security	InvoiceCreation		60.0	Active	1,257	KASHIFA SHAIK 14/04/2024, 3:45 pm	<input type="checkbox"/>
Edit Del Security	OpportunityAutomobileHandler		60.0	Active	1,179	KASHIFA SHAIK 14/04/2024, 3:46 pm	<input type="checkbox"/>
Edit Del Security	OpportunityHandlerClass		60.0	Active	1,941	KASHIFA SHAIK 14/04/2024, 3:45 pm	<input type="checkbox"/>
Edit Del Security	OpportunityInvoiceswithLWC		60.0	Active	337	KASHIFA SHAIK 14/04/2024, 3:51 pm	<input type="checkbox"/>
Edit Del Security	schoolHandler		58.0	Active	274	KASHIFA SHAIK 09/10/2023, 8:29 pm	<input type="checkbox"/>

Milestone 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:**

1. Go to the app >> click on the reports tab
2. Click New Report.
3. Select report type from category or from report type panel or from search panel >> click on start report.
4. Customize your report
5. Add fields from left pane as shown below
6. Add the Above Filter as well.
7. Save or run it.

➤ **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.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Automobile Information Report		Private Reports	KASHIFA SHAIK	14/4/2024, 5:47 pm	
Created by Me	Opportunities closed won		Private Reports	KASHIFA SHAIK	14/4/2024, 5:14 pm	
Private Reports	Opportunities with Automobiles		Private Reports	KASHIFA SHAIK	14/4/2024, 6:00 pm	
Public Reports						
All Reports						
FOLDERS						
All Folders						

Milestone 11- Dashboard

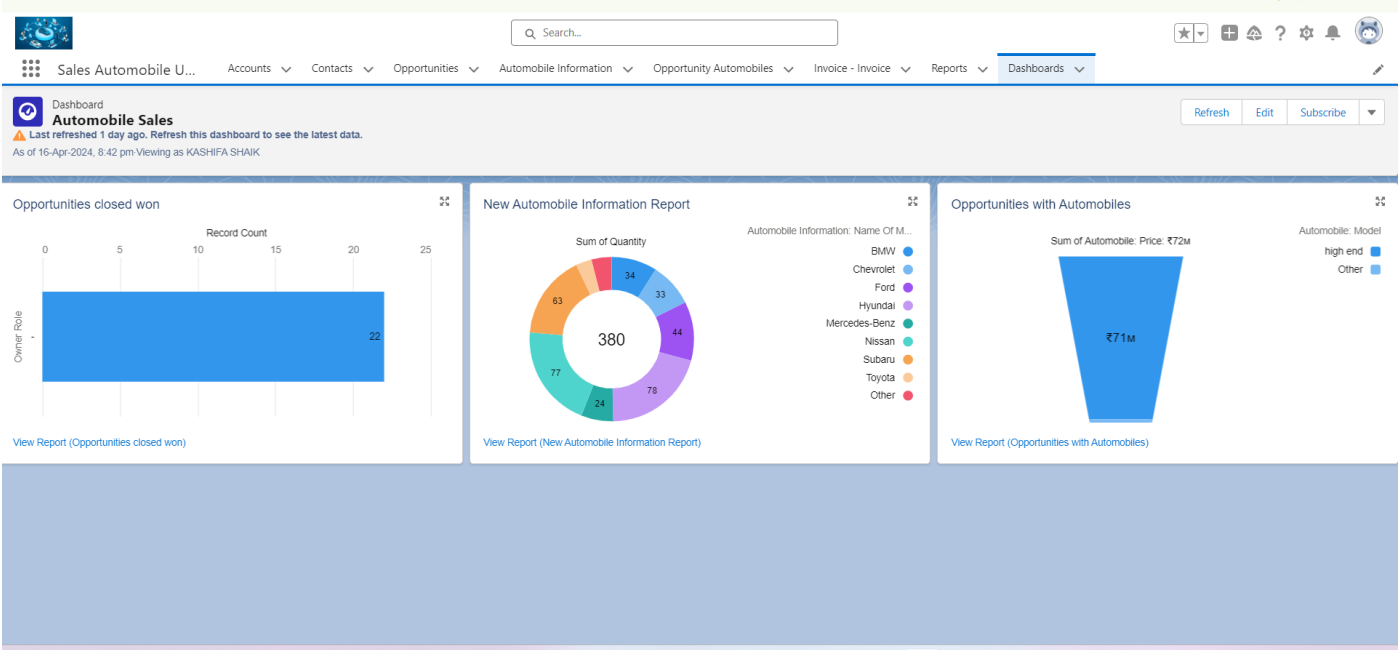
Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you’ve gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

➤ **Sales Dashboard:**

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 component.
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.



The End

