

# WhatsNext Vision Motors

## Salesforce CRM Implementation

### Phase 5:

### Data Management – App Manager (Lightning App Creation)

#### 1. Phase Overview

Phase 5 focuses on creating a custom Lightning App using Salesforce App Manager. The Lightning App provides a single workspace where users can access all required objects, reports, and dashboards related to WhatsNext Vision Motors.

#### 2. Create a Lightning App

Steps to create a Lightning App:

1. Go to Setup
2. In the Quick Find bar, search for App Manager
3. Select App Manager
4. Click on New Lightning App

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#### New Lightning App

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#### App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

##### App Details

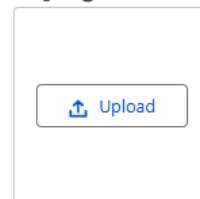
\* App Name ⓘ

\* Developer Name ⓘ

Description ⓘ

##### App Branding

Image ⓘ



Primary Color Hex

Value ⓘ

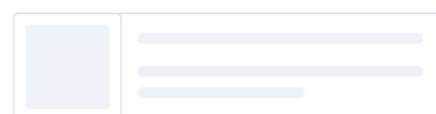


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Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

##### App Launcher Preview



### 3. App Details and Branding

Fill the following details:

- App Name: WhatsNext Vision Motors
- Developer Name: Auto-populated by Salesforce
- Description: Enter a meaningful description
- Image: Optional
- Primary Color Hex Value: Keep default

Click Next to continue.

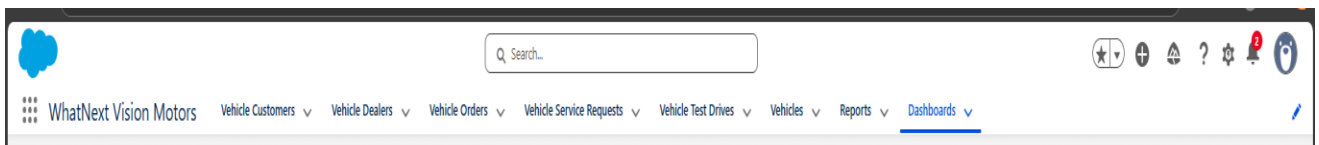
### 4. App Options and Utility Items

On the App Options page, keep the default settings and click Next. On the Utility Items page, keep the default settings and click Next.

### 5. Add Navigation Items

Search and add the following items using the arrow button:

- Vehicle
- Dealer
- Customer
- Order
- Test Drive
- Service Request
- Reports
- Dashboards



Note: Select the custom objects created in previous phases. Click Next after adding items.

### 6. Assign User Profiles

- Search for System Administrator profile
- Move it using the arrow button
- Click Save & Finish

### 7. Phase 5 Outcome

- Lightning App is successfully created
- All required objects are available in one app
- Improved user navigation and productivity