SALES AUTOMOBILE USING SALESFORCE CRM

The project aims to leverage Salesforce CRM to streamline and enhance the sales processes of an automobile company. By implementing a centralized, cloud-based system, the company can efficiently manage customer relationships, track leads, automate workflows, and analyze sales performance. The dealership will gain a centralized platform to manage customer interactions, optimize lead-to-sale conversion rates, and foster long-term customer relationships.

With advanced tools like AI-driven predictions, automated workflows, and real-time dashboards, the solution empowers sales teams to deliver personalized experiences, reduce response times, and improve overall sales efficiency. Furthermore, the mobile-friendly features of Salesforce enable sales representatives to operate effectively from anywhere, enhancing productivity and customer satisfaction.

The project will involve:

- **Requirements Gathering**:
    - Collaborating with stakeholders to understand business needs, sales workflows, and pain points in the current system.
- **Salesforce CRM Implementation:**
    - Configuring **Sales Cloud** for lead and opportunity management.
    - Setting up **Service Cloud** for after-sales support and customer service.
- **Integration with Third-Party Tools**:
    - Connecting Salesforce with inventory management systems to track vehicle availability.
    - Enabling payment gateway and financing options for seamless transactions.

- **Testing and Deployment:**
  - Rigorous testing of the configured Salesforce system to ensure all features work as intended.
  - Deploying the solution and monitoring its performance in the live environment.

- **Post-Implementation Support:**
  - Offering maintenance, support, and periodic updates to enhance the platform's efficiency.
  - Gathering user feedback to implement improvements and additional features.

Task 1: Create Objects from Spreadsheet

Objective:

- The primary objective of this project is to implement Salesforce CRM to streamline and optimize the sales processes of an automobile business.
- Automate repetitive tasks and simplify workflows to allow the sales team to focus on building relationships and closing deals.

Objects Created:

1. **Automobile Information, Invoice:**
   - These are key objects designed to identify Information like (Manufacturer, Model, Engine number, Bilt Date, Price)
   - The Invoice information is created as Invoice ID, Total Price, Quantity, Unit Price, Purchase Date.

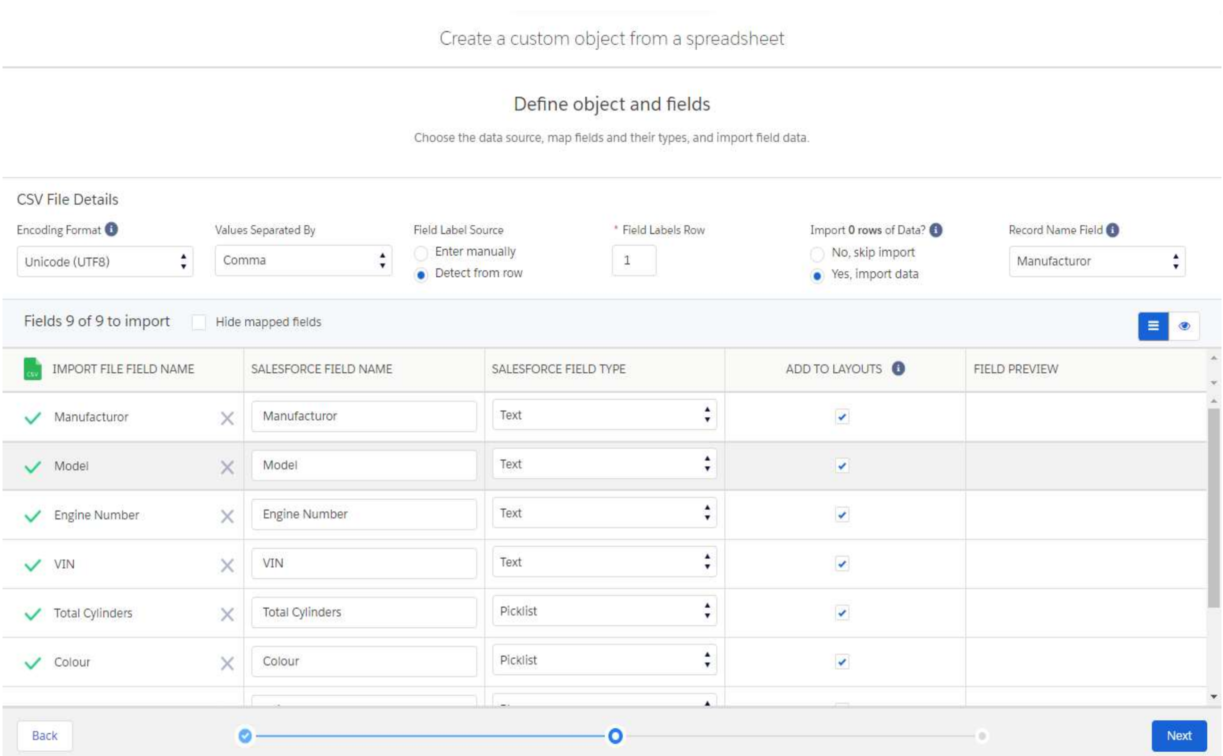
2. **Automobile Object**:
   - The automobile information created like:
     - Record Name
     - Date Type
     - Display Format

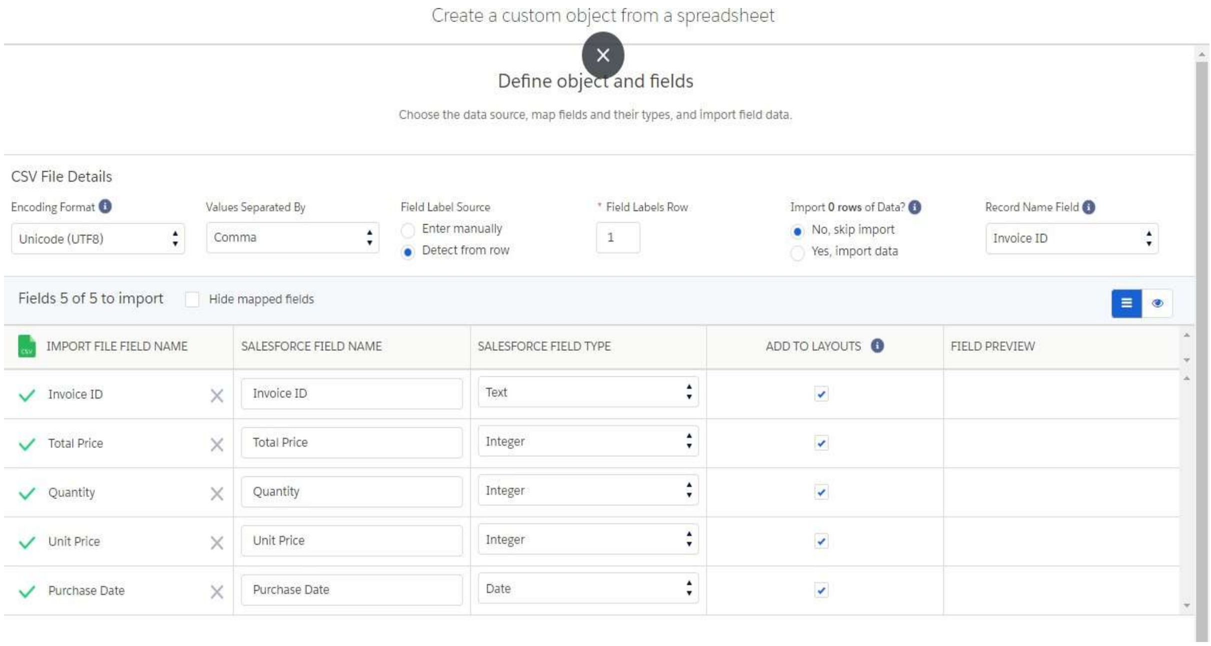
Customization and Configuration:

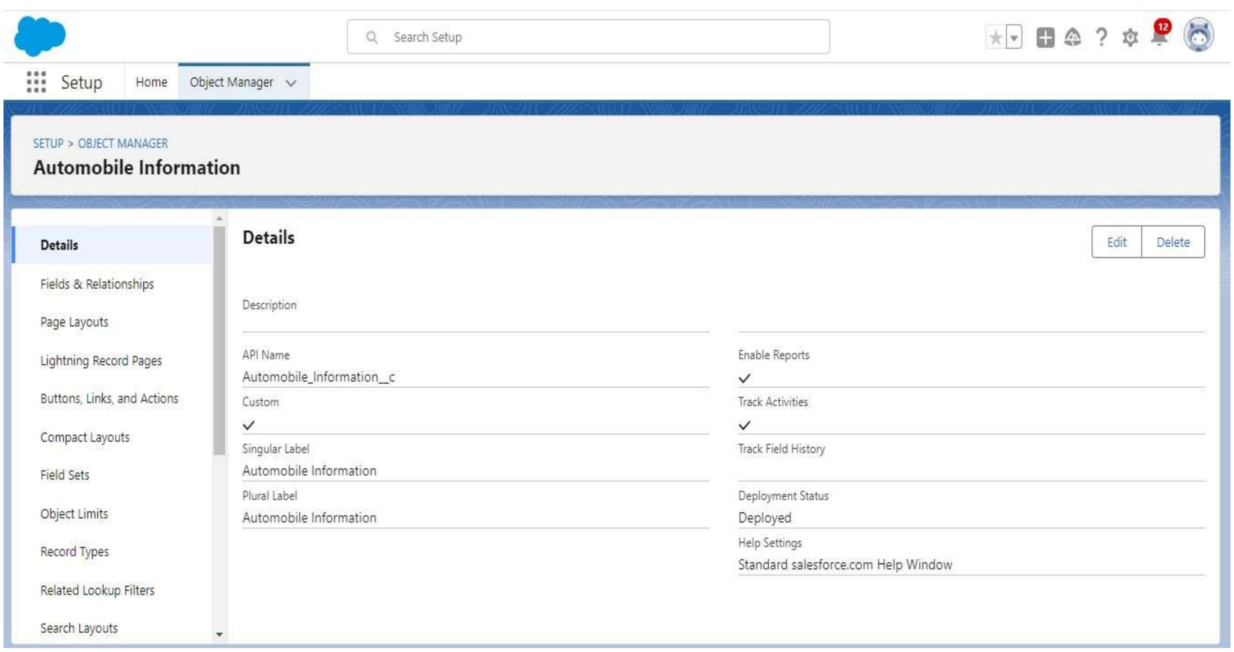
- Maintain a comprehensive inventory of all vehicles, including details like make, model, year, color, price, and availability.
- Integrate with lead and opportunity management processes for test drives, quotes, and purchase orders.

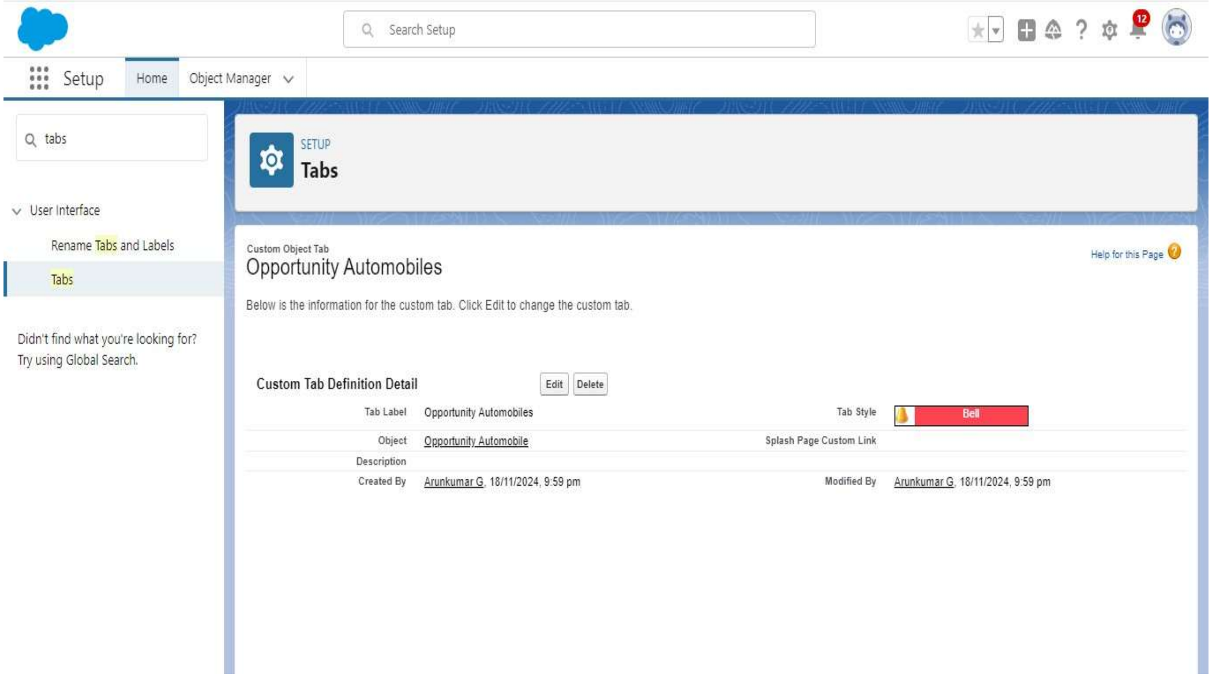
Creating Tabs:

- Tabs serve as the primary interface for users to view, create, and manage records associated with custom or standard objects.
- Provides access to the inventory of vehicles, allowing users to quickly find details about models, pricing, and availability.
- A sales representative can access the Automobile Information tab to confirm vehicle availability while discussing options with a customer




Create a custom object from a spreadsheet
Define object and fields
Choose the data source, map fields and their types, and import field data.
CSV File Details
Encoding Format
Unicode (UTF8)
Values Separated By
Comma
Field Label Source
Enter manually
Detect from row
* Field Labels Row
1
Import 0 rows of Data?
No, skip import
Yes, import data
Record Name Field
Invoice ID
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
Total Price
Total Price
Integer
Quantity
Quantity
Integer
Unit Price
Unit Price
Integer
Purchase Date
Purchase Date
Date

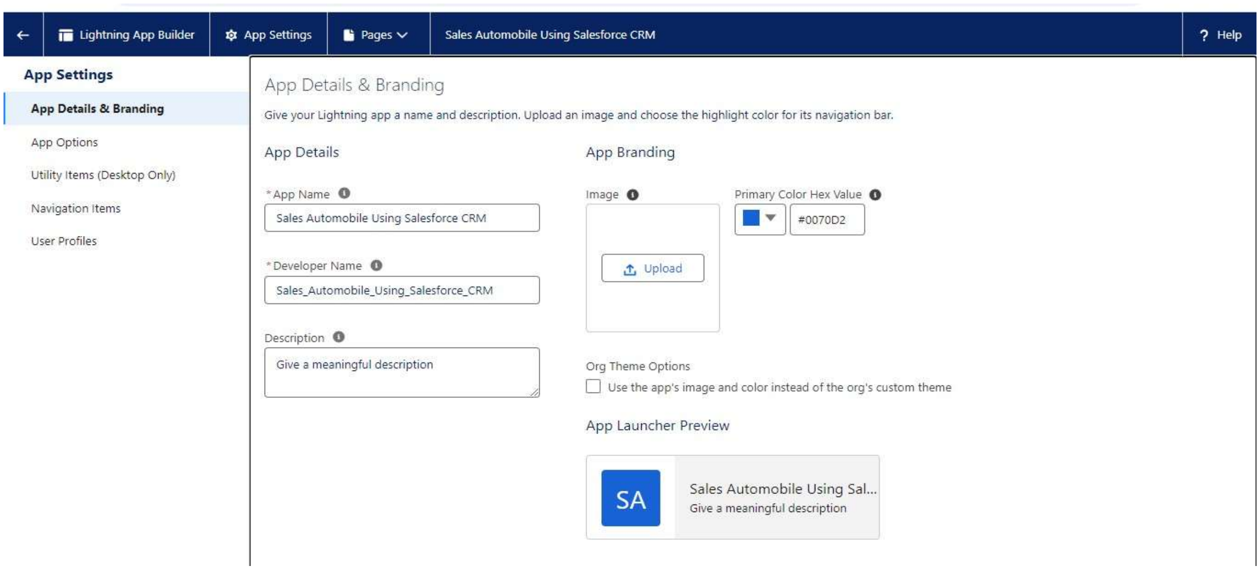

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Automobile Information
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
Details
Edit
Delete
Description
API Name
Automobile_Information__c
Custom
Singular Label
Automobile Information
Plural Label
Automobile Information
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window



Task 2: Create a Lightning App

Creating a Lightning App in Salesforce provides users with a tailored, efficient, and visually appealing environment to perform their tasks. In an automobile sales context, such apps can streamline processes, enhance collaboration, and improve overall operational efficiency, ultimately leading to better customer service and higher sales performance is created.

- **Unified Experience:**
  - A **Sales App** for an automobile dealership can bring together tabs like **Leads**, **Opportunities**, **Automobile Inventory**, and **Invoices** in a single interface, reducing the need for users to switch between different views.
- **Role-Based Customization:**
  - **Sales Team App**: Focuses on leads, opportunities, and vehicle information.
  - **Finance App**: Includes invoices, payments, and financial reports.
  - **Service App**: Highlights post-sale service requests and customer history.



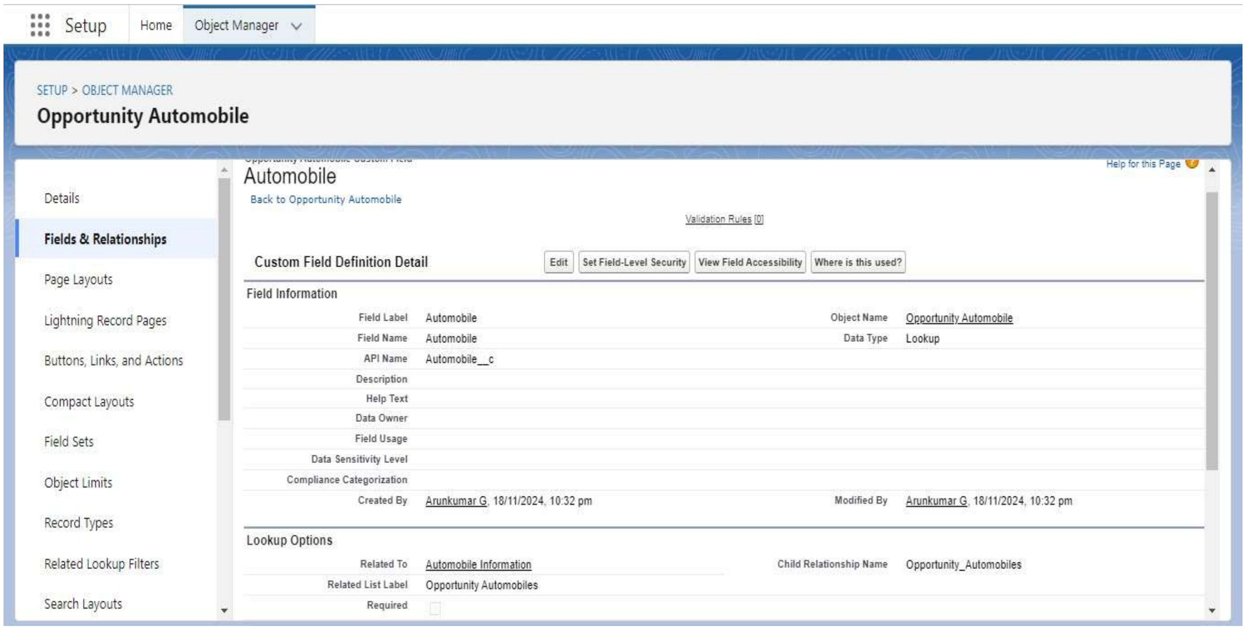
Task 3: Create Fields and Relationships:

Step 1: Create Opportunity Master Details

1. Navigate to **Setup** → **Object Manager**→ **Opportunity Automobile**.
2. Click on Fields & Relationships
3. Enter the following details :
   - **Data Type:** Master Details
   - **Field Label:** Opportunity
   - **Field Name:** Opportunity

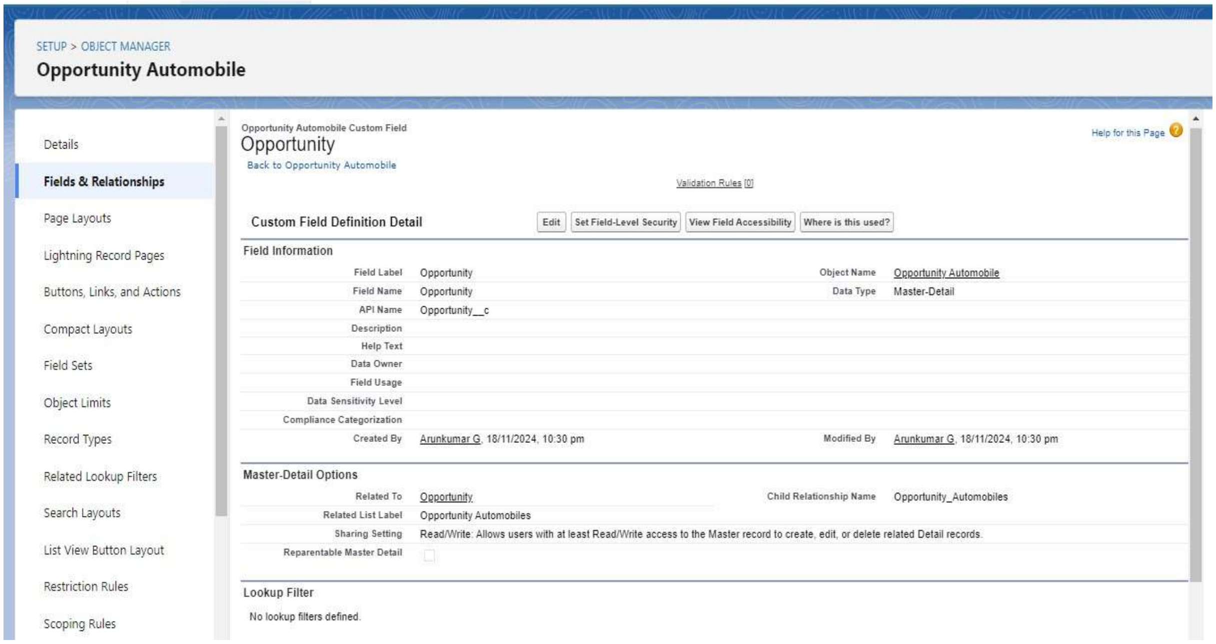
Step 2: Create Opportunity Automobile

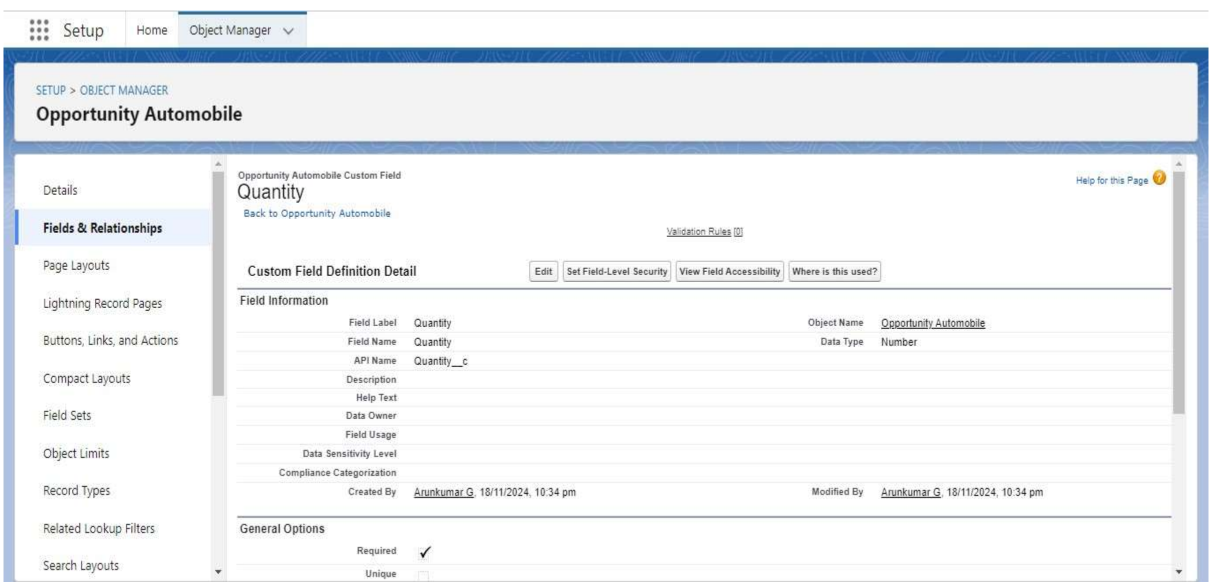
1. Navigate to **Setup** → **Object Manager**→ **Opportunity Automobile**
2. Click on Fields & Relationships
3. Enter the following details:
   - **Data Type:** Lookup Relationship
   - **Field Label:** Automob



Step 3: Create Quantity Number Field

1. Navigate to **Setup → Object Manager→ Opportunity Automobile**
2. Click on Fields & Relationships
3. Enter the following details:
    - **Data Type:** Numbers
    - **Field Label:** Automobile
    - **Field Name:** Automobile


SETUP > 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
Scoping Rules
Opportunity Automobile Custom Field
Opportunity
Back to Opportunity Automobile
Help for this Page
Validation Rules [0]
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label Opportunity
Object Name Opportunity Automobile
Field Name Opportunity
Data Type Master-Detail
API Name Opportunity__c
Description
Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Created By Arunkumar G, 18/11/2024, 10:30 pm
Modified By Arunkumar G, 18/11/2024, 10:30 pm
Master-Detail Options
Related To Opportunity
Child Relationship Name Opportunity_Automobiles
Related List Label Opportunity Automobiles
Sharing Setting Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.
Reparentable Master Detail
Lookup Filter
No lookup filters defined.


Setup
Home
Object Manager
SETUP > 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
Opportunity Automobile Custom Field
Quantity
Back to Opportunity Automobile
Help for this Page
Validation Rules [0]
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label Quantity
Object Name Opportunity Automobile
Field Name Quantity
Data Type Number
API Name Quantity__c
Description
Help Text
Data Owner
Field Usage
Data Sensitivity Level
Compliance Categorization
Created By Arunkumar G, 18/11/2024, 10:34 pm
Modified By Arunkumar G, 18/11/2024, 10:34 pm
General Options
Required ✓
Unique

Step 4: Create Formula Field

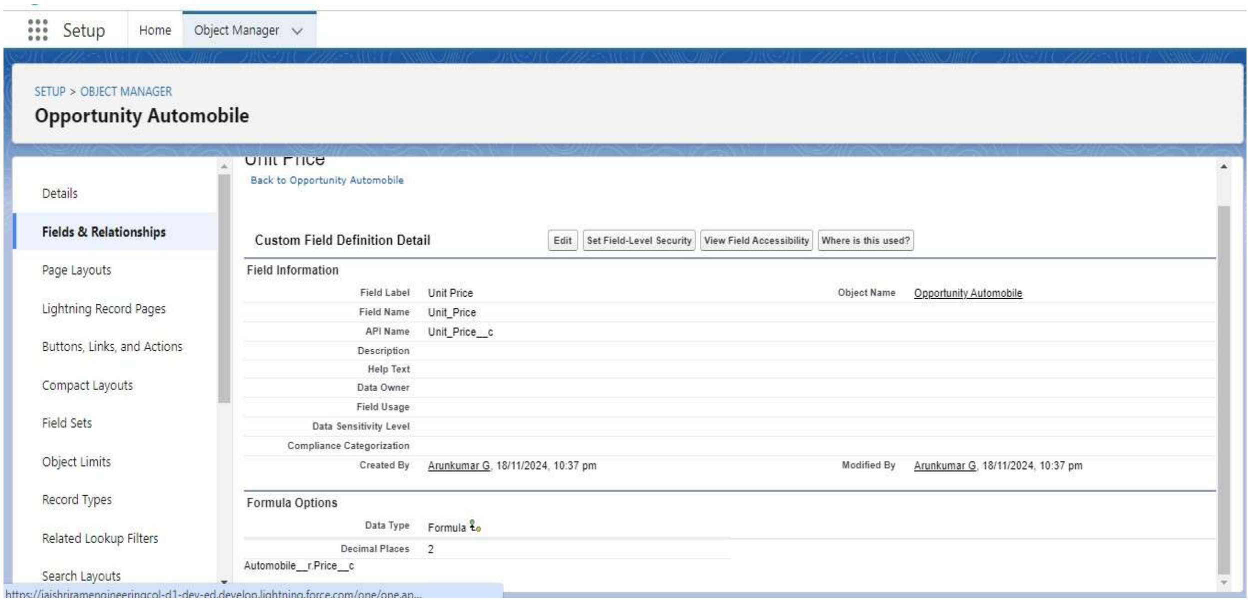
1. Navigate to **Setup → Object Manager→ Opportunity Automobile**
2. Click on Fields & Relationships
3. Enter the following details:
   - **Data Type:** Formula
   - **Field Label:** Unit Price
   - **Field Name:** Unit Price

Step 5: Update Fields in Invoice Object

1. Navigate to **Setup → Object Manager→ Opportunity Automobile**
2. Click on Fields & Relationships
3. Enter the following details:
   - **Data Type:** Auto Number
   - **Display Format:** I-{0000}
   - **Starting Nuber:** 1

Step 6: Create Another Field

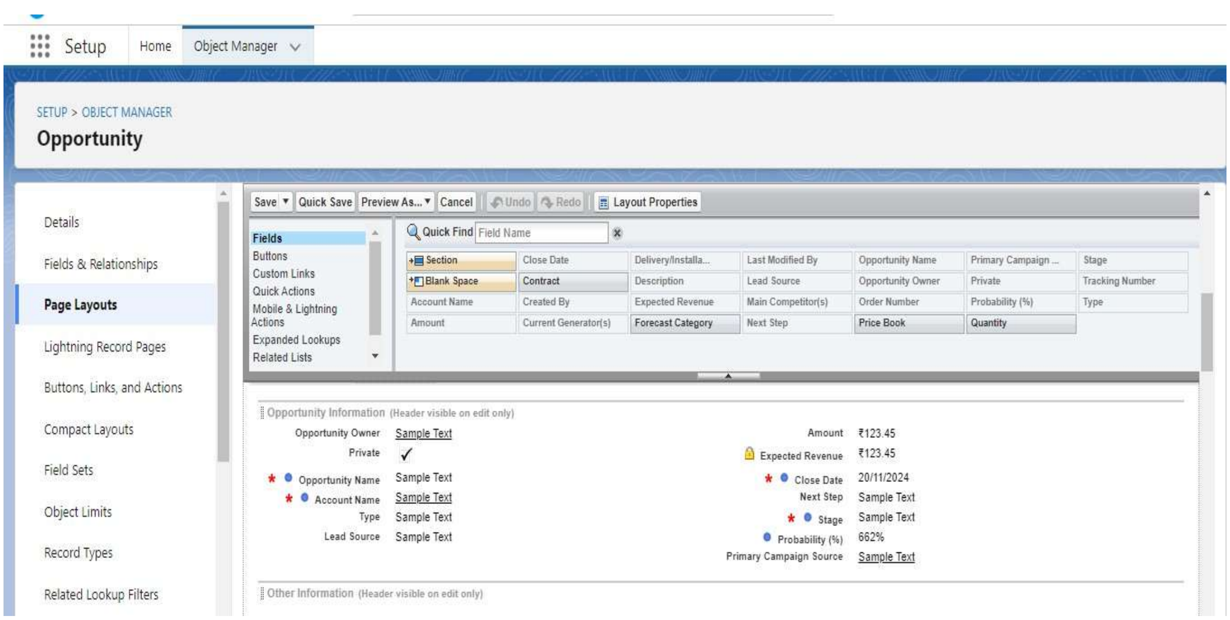
1. Navigate to **Setup → Object Manager→ Opportunity Automobile**
2. Click on Fields & Relationships
3. Enter the following details:
   - **Data Type:** Master Details Relationship
   - **Field Name:** Opportunity
   - **Object:** Opportunity



Task 4: Page Layouts:

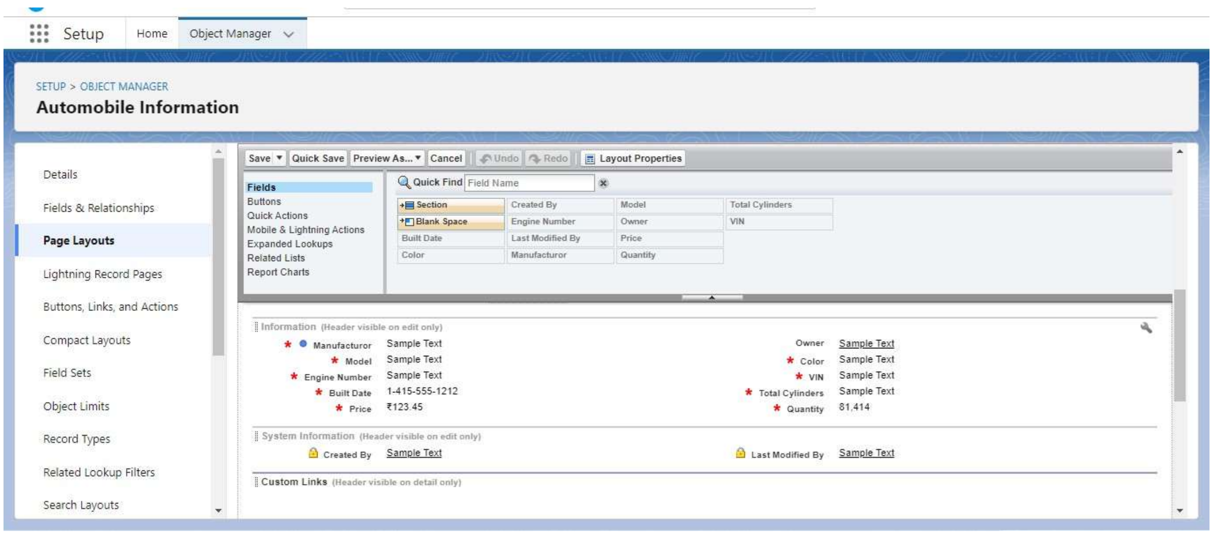
Step 1: Edit Opportunity Object Page Layout

1. Go to **Setup → Object Manager→ Search → Opportunity Layout.**
2. Next **Page Layouts → Opportunity Layouts.**



Step 2: Edit Automobile Information Page Layout

1. Go to **Setup → Object Manager→ Search → Automobile Information.**
2. Next **Page Layouts → Automobile Information.**



Task 5: Creating Apex Triggers

Step 1: Trigger for Automobile Quantity

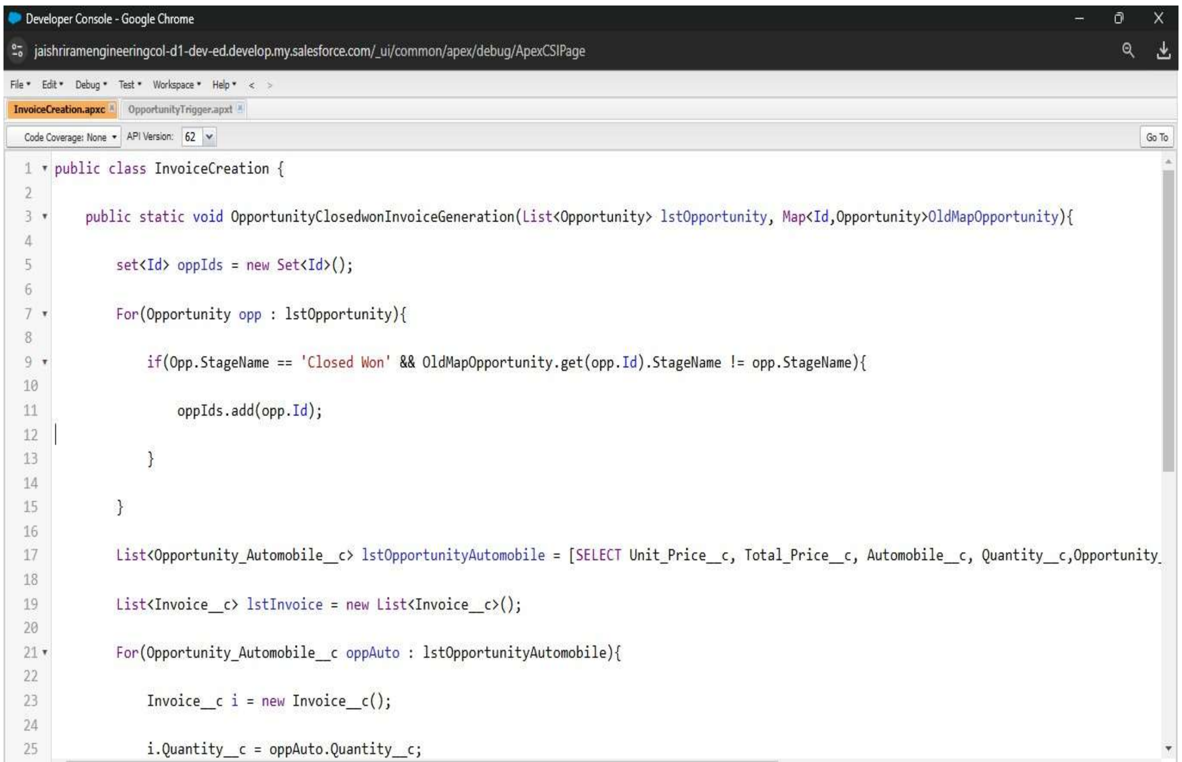
- Navigate to the gear icon on top right corner, click on Developer Consol.
- Find FILE in tool bar and click on it to create new Apex Class with name "OpportnityHandler Class".
    - Add the Java program to the Apex class & create a Trigger Handler class.
    - Create an Apex Trigger & type the code.

Step 2: Trigger for Opportunity-Automobile Error

- Same as the previous step create an Apex class with class name "OpportunityAutomobileHandler".
- Also create a new Trigger Handler & new Apex Trigger.

Step 3: Invoice Creation Trigger

- Follow the last step and create another new Apex class with "InvoiceCreation" as the class name.
- It also has its own Trigger Handler with unique Trigger as code.



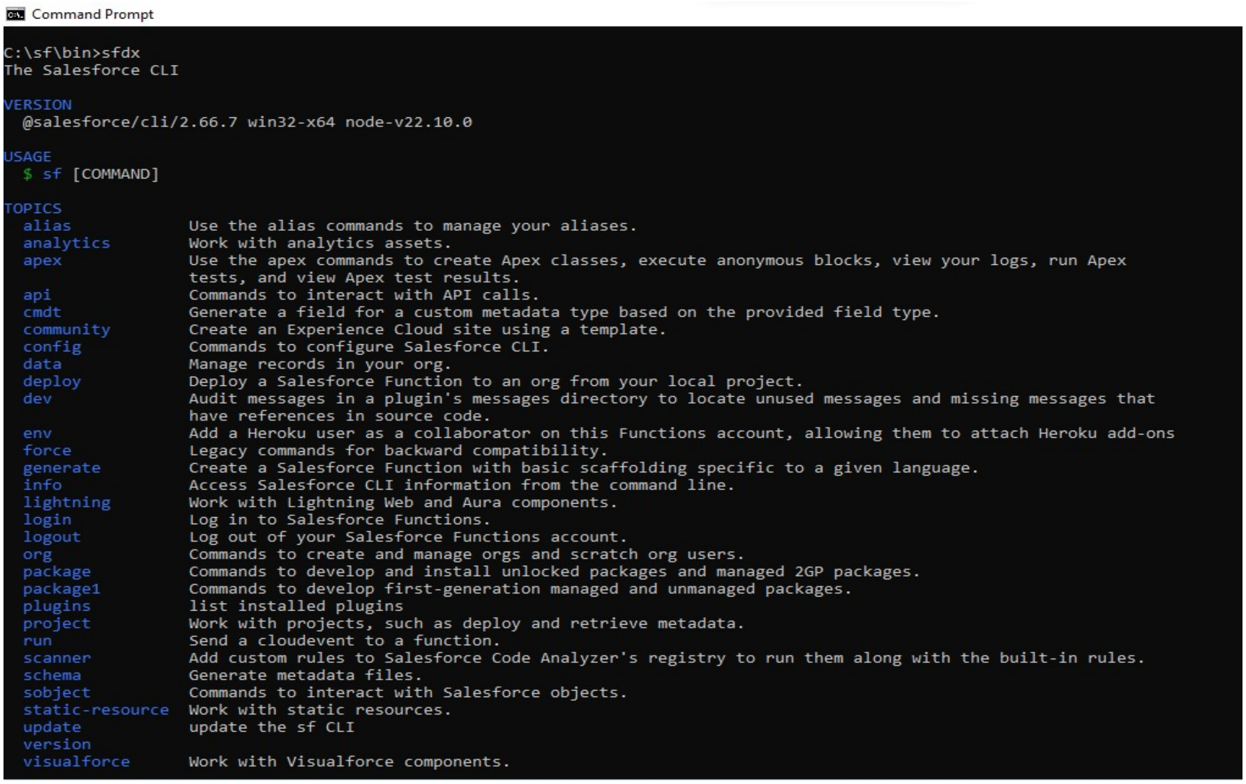
Task 6: Creation of LCW Component

Step 1: Apex class to get Invoice

- New Apex class with class name "OppertunityInvoiceswithLWC" must be created

Step 2: Install Salesforce CLI

- 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.



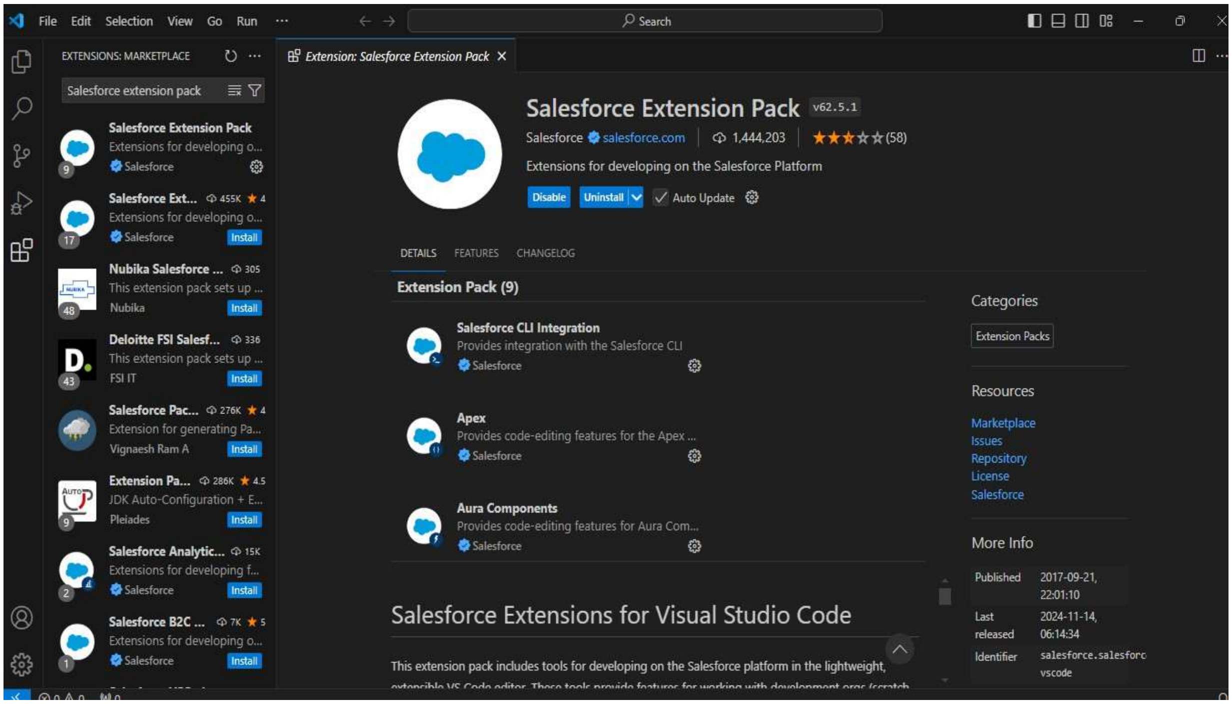
```
Command Prompt

C:\sf\bin>sfdx
The Salesforce CLI

VERSION
  @salesforce/cli/2.66.7 win32-x64 node-v22.10.0

USAGE
  $ sf [COMMAND]

TOPICS
  alias            Use the alias commands to manage your aliases.
  analytics        Work with analytics assets.
  apex             Use the apex commands to create Apex classes, execute anonymous blocks, view your logs, run Apex
                   tests, and view Apex test results.
  api              Commands to interact with API calls.
  cmdt             Generate a field for a custom metadata type based on the provided field type.
  community        Create an Experience Cloud site using a template.
  config           Commands to configure Salesforce CLI.
  data             Manage records in your org.
  deploy           Deploy a Salesforce Function to an org from your local project.
  dev              Audit messages in a plugin's messages directory to locate unused messages and missing messages that
                   have references in source code.
  env              Add a Heroku user as a collaborator on this Functions account, allowing them to attach Heroku add-ons
  force            Legacy commands for backward compatibility.
  generate         Create a Salesforce Function with basic scaffolding specific to a given language.
  info             Access Salesforce CLI information from the command line.
  lightning        Work with Lightning Web and Aura components.
  login            Log in to Salesforce Functions.
  logout           Log out of your Salesforce Functions account.
  org              Commands to create and manage orgs and scratch org users.
  package          Commands to develop and install unlocked packages and managed 2GP packages.
  package1         Commands to develop first-generation managed and unmanaged packages.
  plugins          list installed plugins
  project          Work with projects, such as deploy and retrieve metadata.
  run              Send a cloudevent to a function.
  scanner          Add custom rules to Salesforce Code Analyzer's registry to run them along with the built-in rules.
  schema           Generate metadata files.
  sobject          Commands to interact with Salesforce objects.
  static-resource  Work with static resources.
  update           update the sf CLI
  version
  visualforce      Work with Visualforce components.
```

Step 3: 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.

Step 4: Install Salesforce Extension Packs

- Go to extensions in VS Code & install the “Salesforce Extension”.
- The Salesforce extensions help us analyze or deploy a code faster.
- There are many packs available so be careful to install the proper salesforce packs.



Step 5: Create a Project in VS Code

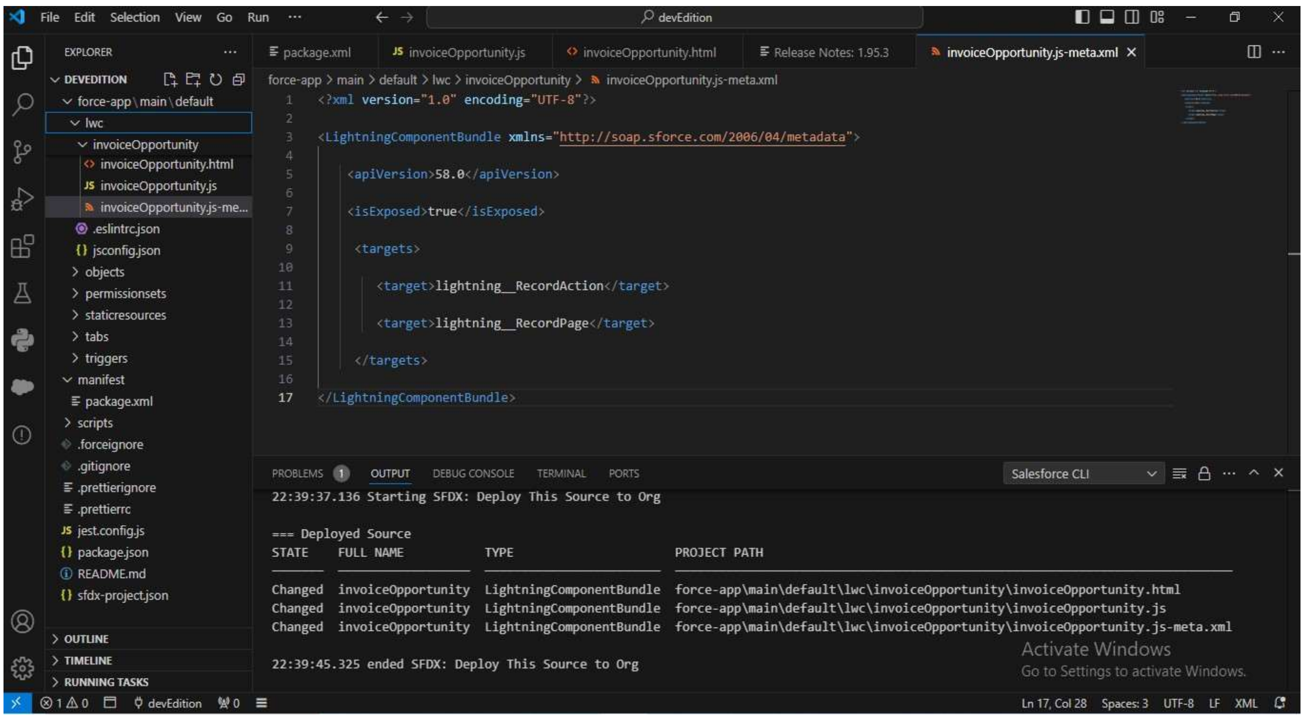
- Press CTRL + SHIFT + P, type sfdx: create.
- Select SFDX: Create Project with Manifest.
- Select the Standard project template
- Type a project name and Click Enter.
- Type a project name and Click Enter.

Step 6: 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.

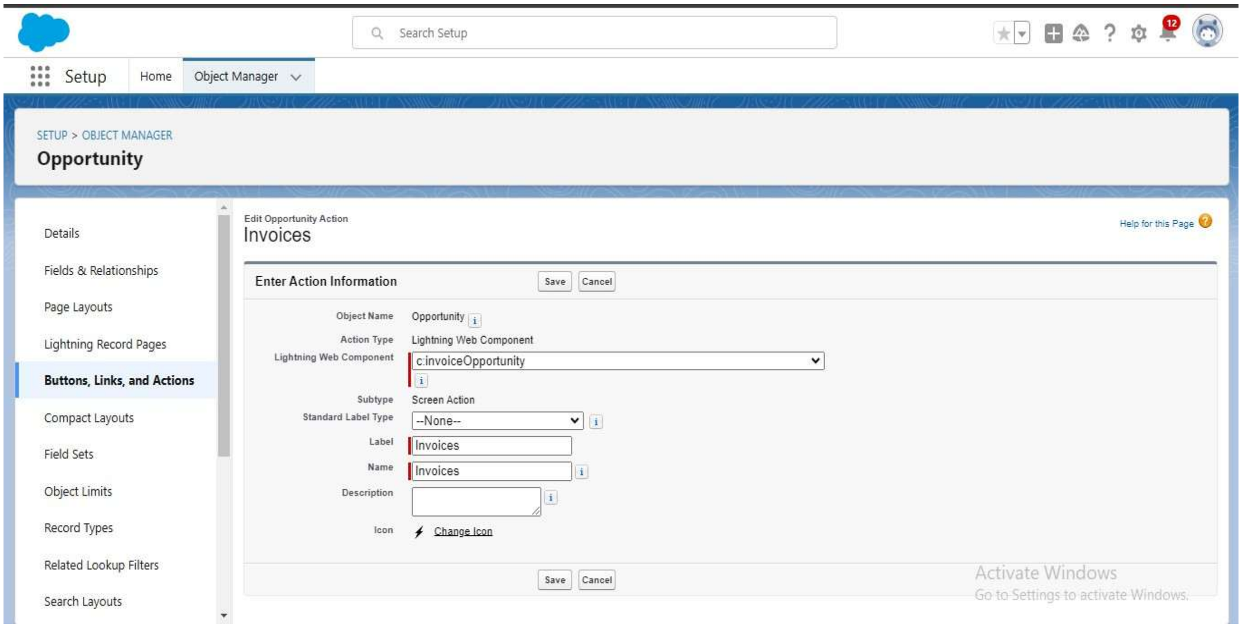
Step 7: Creating Lightning Web Component

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



Step 8: Create Button to Add on Opportunity

1. Click on Object Manager
2. Search Opportunity and Click on it .
3. click on the New Action.
4. InvoiceOpportunity component
   a. Label :- Invoices, Name :- Invoices



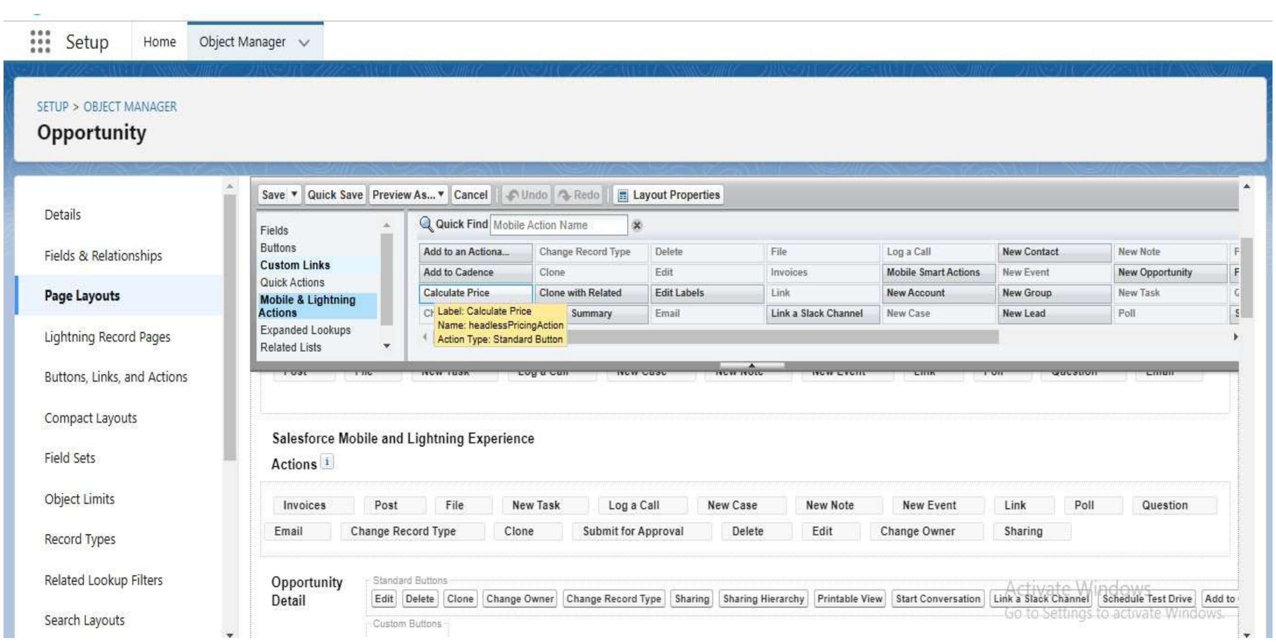
Step 9: Add InvoiceOpportunity into Opportunity Record Page

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

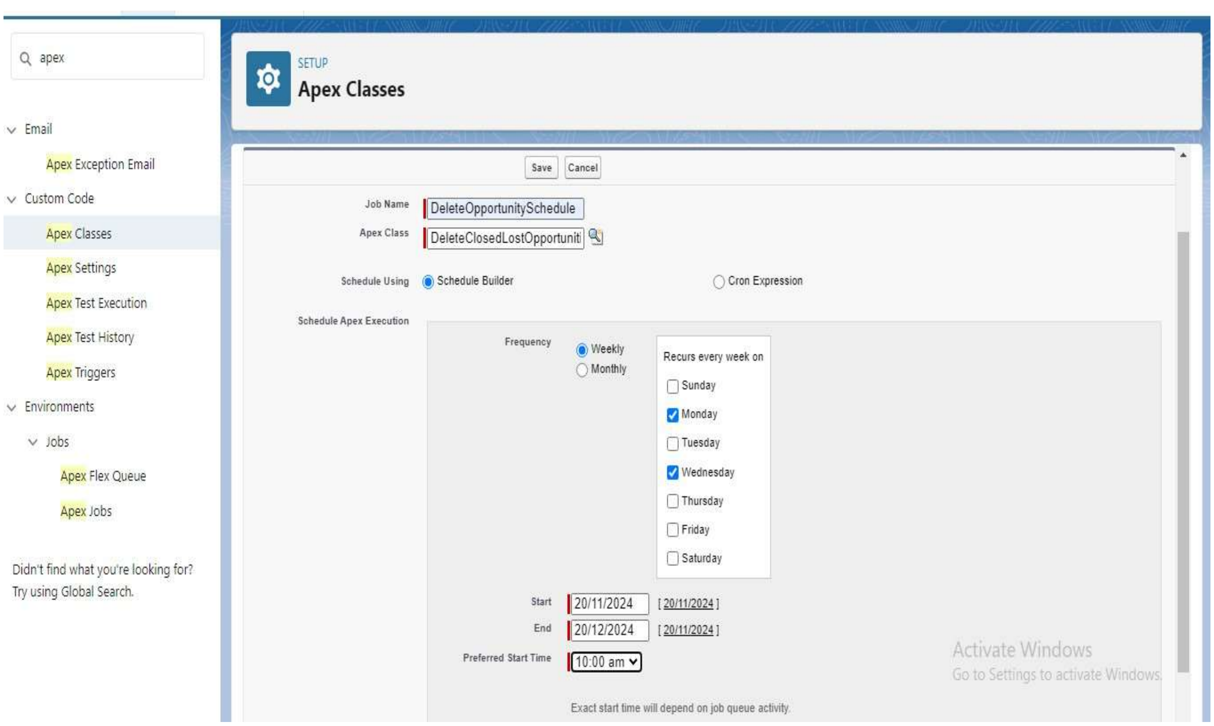
4. Drag and Drop the Invoice into Salesforce Mobile and Lightning Experience Actions.

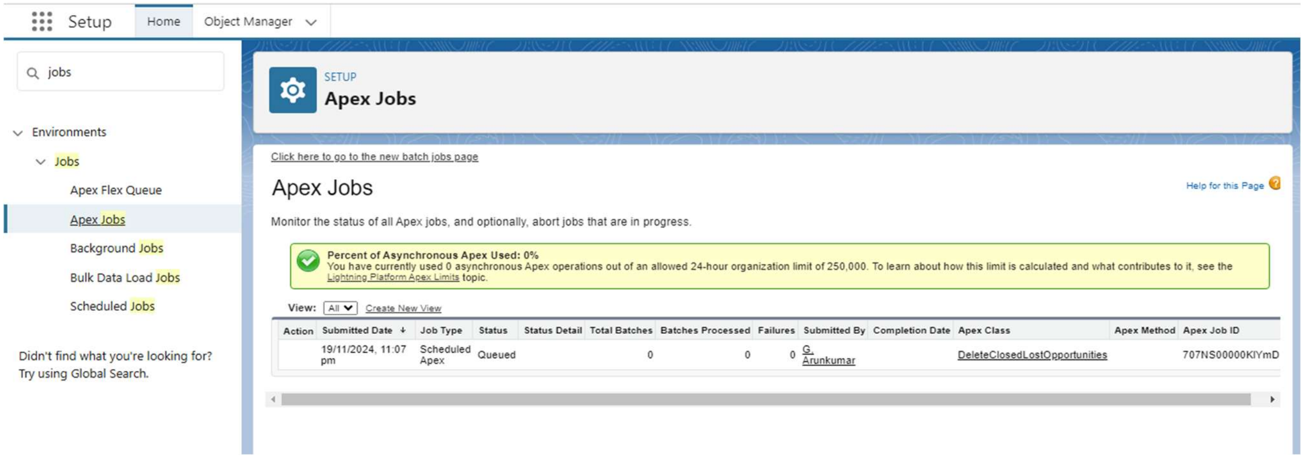


Task 7: Apex Schedulers

Step 1: Delete opportunity Schedule Class

- 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 "DeleteClosedLostOpportunities "
- Click on Schedule Apex and enter the Job name.
- Job Name : DeleteOpportunitySchedule

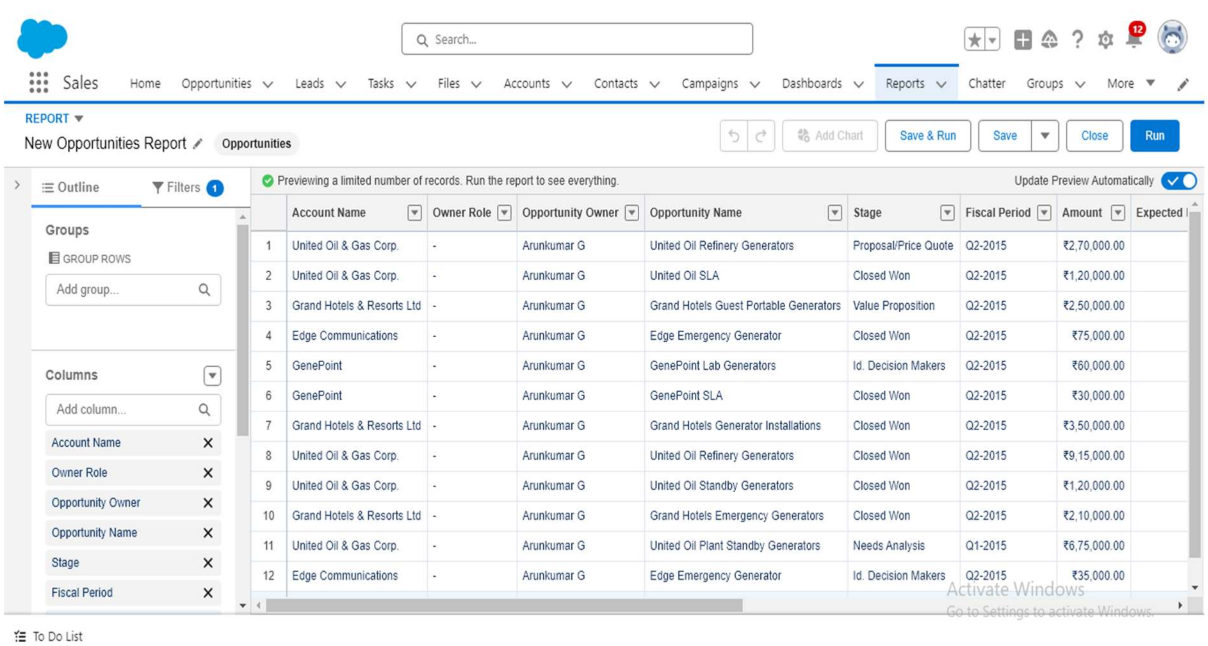




Task 8: Reports

Step 1: Create Report on Opportunity

- Go to the app → click on the reports tab
- Click New Report.
- Search panel >> click on start report.

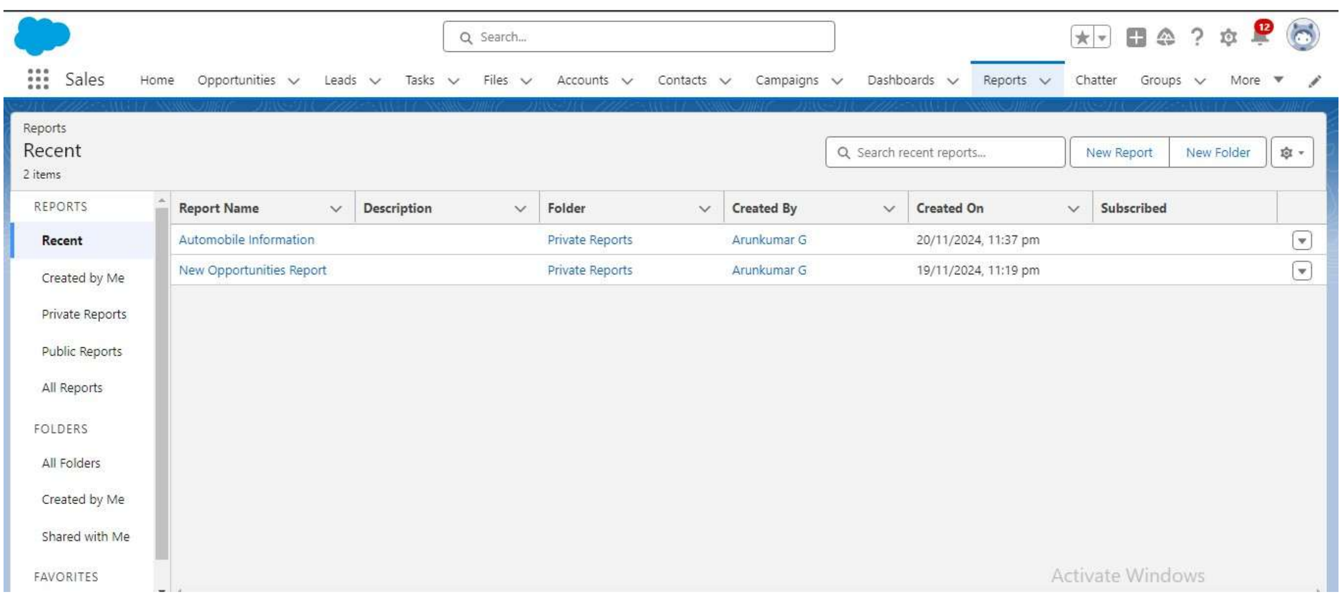


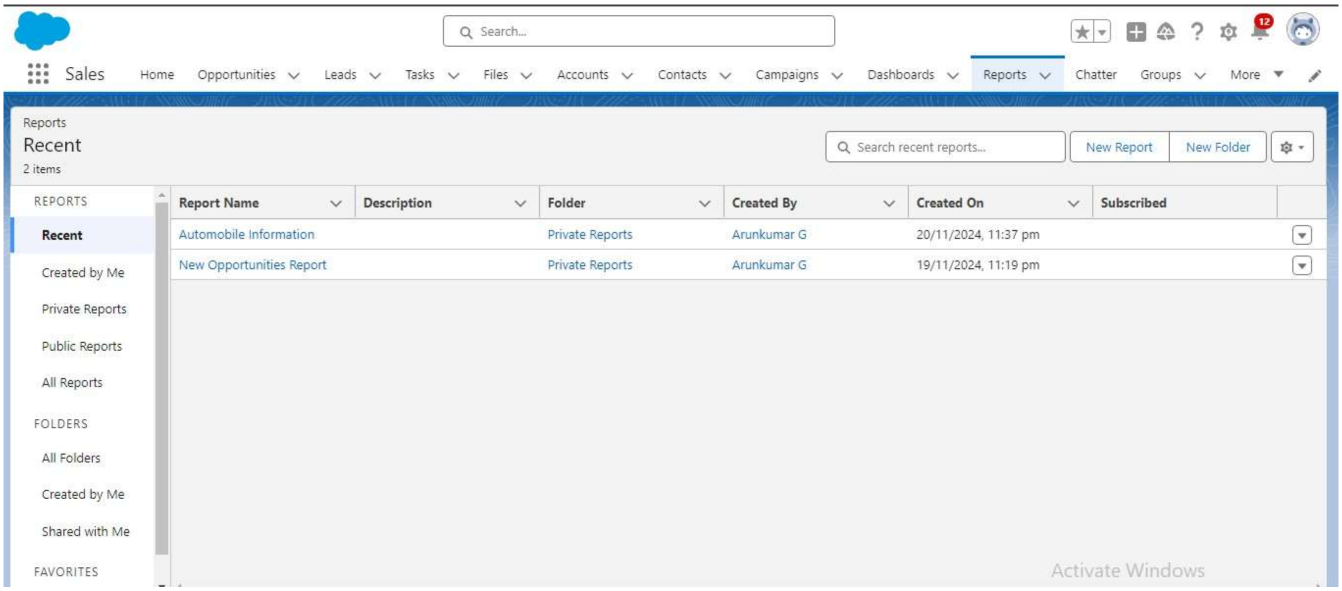
Step 2: Report on Automobile Information

- Create a report with a report type: "Automobile Information".

- Create a Report by using "Opportunities with Opportunity Automobiles and Automobile" Report Type.

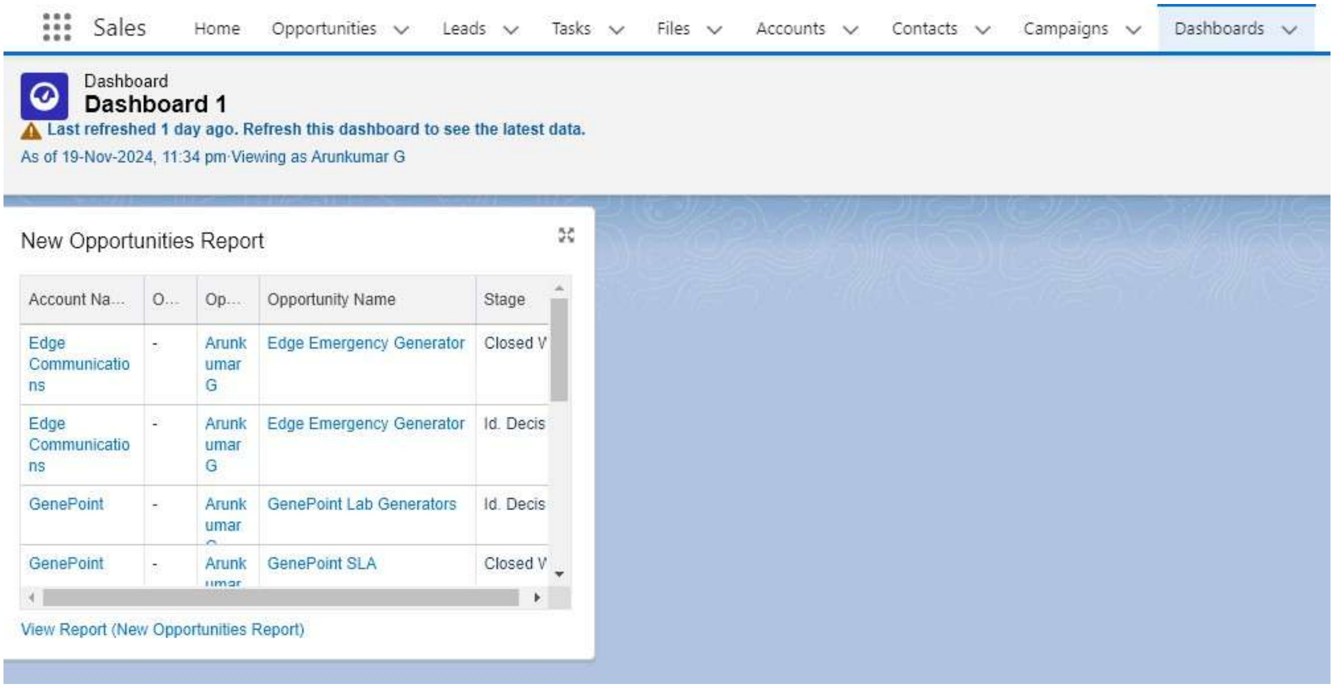
- Types of Reports:
  - Tabular
  - Summary
  - Matrix
  - Joined Reports

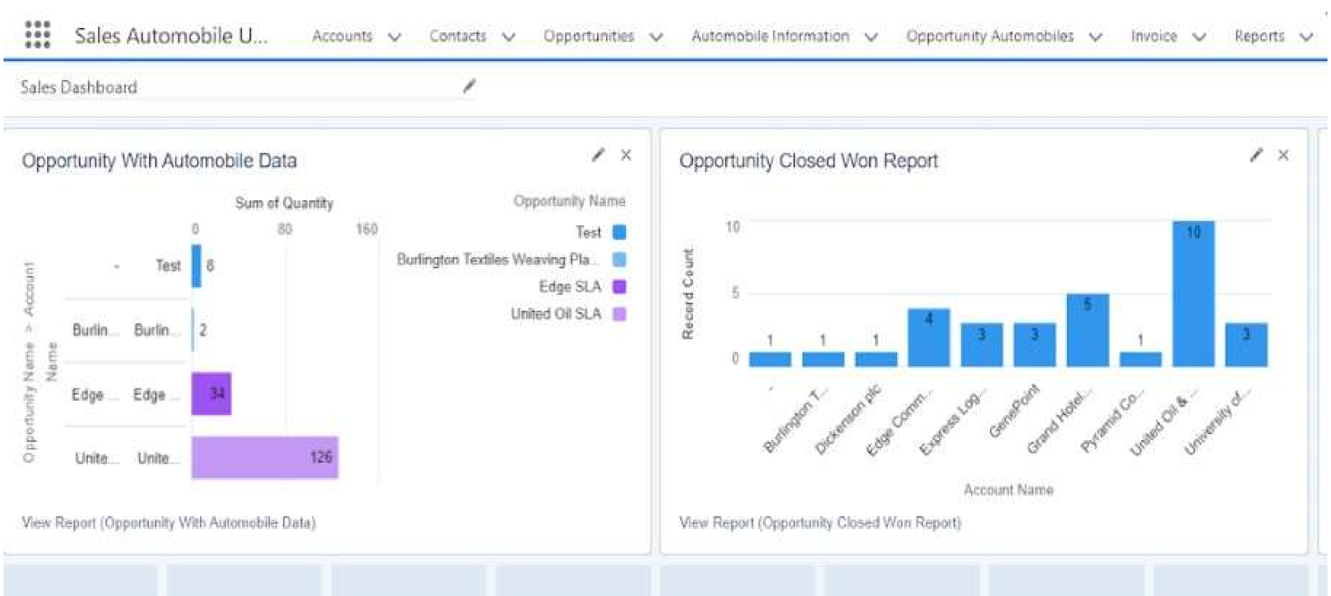




Step 3: Create Sales Dashboard

- Go to the app ? click on the Dashboards tabs.
- Give a Name and click on Create.
- Name : Automobile Sales
- Select add component & Report


Sales
Home
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Campaigns
Dashboards
Dashboard
Dashboard 1
Last refreshed 1 day ago. Refresh this dashboard to see the latest data.
As of 19-Nov-2024, 11:34 pm·Viewing as Arunkumar G
New Opportunities Report
Account Na... | O... | Op... | Opportunity Name | Stage
Edge Communications | - | Arunkumar G | Edge Emergency Generator | Closed V
Edge Communications | - | Arunkumar G | Edge Emergency Generator | Id. Decis
GenePoint | - | Arunkumar | GenePoint Lab Generators | Id. Decis
GenePoint | - | Arunk | GenePoint SLA | Closed V
View Report (New Opportunities Report)


Sales Automobile U...
Accounts
Contacts
Opportunities
Automobile Information
Opportunity Automobiles
Invoice
Reports
Sales Dashboard
Opportunity With Automobile Data
Sum of Quantity
0
80
160
Opportunity Name
Test
Burlington Textiles Weaving Pla...
Edge SLA
United Oil SLA
Opportunity Name > Account Name
- Test 8
Burlin... Burlin... 2
Edge ... Edge ... 34
Unite... Unite... 126
View Report (Opportunity With Automobile Data)
Opportunity Closed Won Report
Record Count
10
5
0
Burlington T...
Dickenson plc
Edge Comm...
Express Log...
GenePoint
Grand Hotel...
Pyramid Co...
United Oil &...
University of...
Account Name
View Report (Opportunity Closed Won Report)