

Project Name: Sales Automobile Using Salesforce

CRM

Team ID : LTVIP2024TMID11576

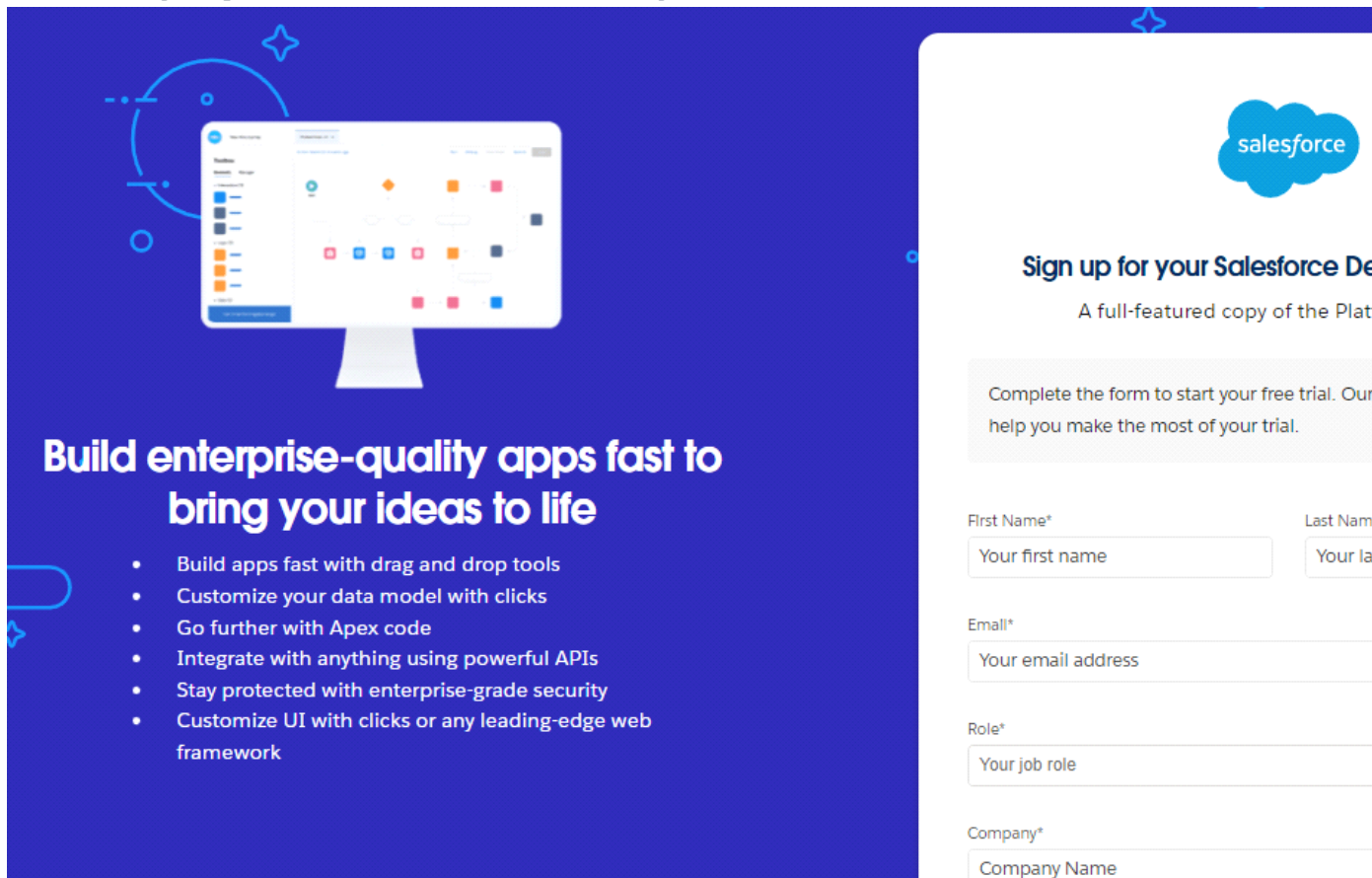
Team Leader : V SHILPA

Salesforce

Creating Developer Account

Creating a developer org in salesforce.

- Go to <https://developer.salesforce.com/signup>
- On the sign up form, enter the following details :

The image shows a promotional banner for Salesforce on the left and a sign-up form on the right. The banner has a blue background with a white monitor displaying a Salesforce interface. The text on the banner reads: "Build enterprise-quality apps fast to bring your ideas to life". Below this, there is a list of bullet points: "Build apps fast with drag and drop tools", "Customize your data model with clicks", "Go further with Apex code", "Integrate with anything using powerful APIs", "Stay protected with enterprise-grade security", and "Customize UI with clicks or any leading-edge web framework". The sign-up form on the right has a white background with a blue Salesforce logo at the top. The text on the form reads: "Sign up for your Salesforce Developer Account" and "A full-featured copy of the Platform". Below this, there is a grey box with the text: "Complete the form to start your free trial. Our experts will help you make the most of your trial." The form fields are: "First Name*" (with placeholder "Your first name"), "Last Name*" (with placeholder "Your last name"), "Email*" (with placeholder "Your email address"), "Role*" (with placeholder "Your job role"), and "Company*" (with placeholder "Company Name").

Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

Sign up for your Salesforce Developer Account

A full-featured copy of the Platform

Complete the form to start your free trial. Our experts will help you make the most of your trial.

First Name*

Last Name*

Email*

Role*

Company*

- First name & Last name
- Email
- Role : Developer
- Company : College Name

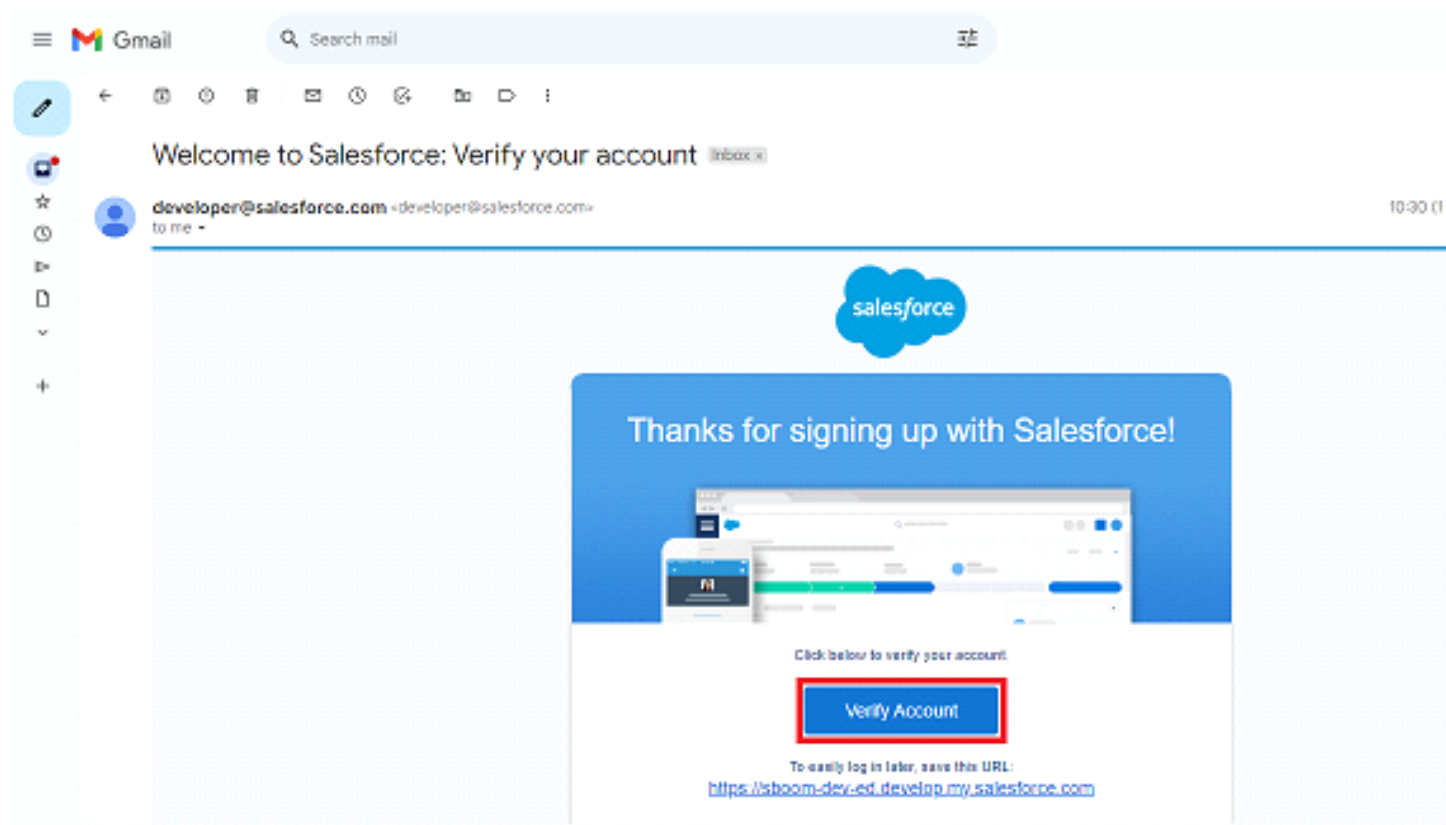
- County : India
- Postal Code : pin code
- Username : should be a combination of your name and company

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.

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.



1. Click on Verify Account
2. Give a password and answer a security question and click on change password.

Change Your Password

Enter a new password for **lead@sb.oom**.

Make sure to include at least:

- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

* New Password

..... Good

* Confirm New Password

..... Match

Security Question

▼ In what city were you born?

* Answer

asdfghjkl

Change Password

1. Then you will redirect to your salesforce setup page.



Search Setup



Setup

Home

Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

ADMINISTRATION

> Users



SETUP

Home



Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

[Get Started](#)



Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

[Learn More](#)




Real-time

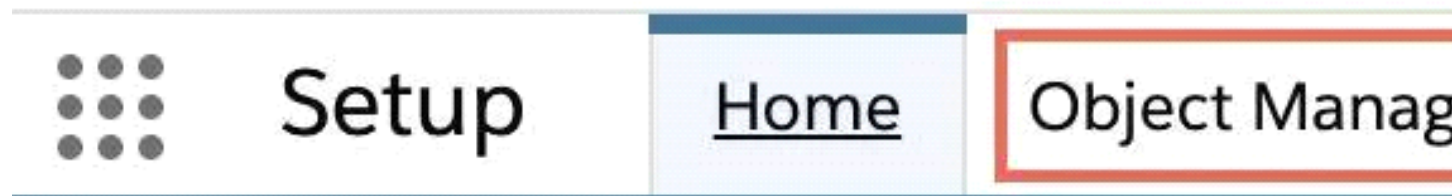
Transform pro
docs, spread

Object

Create Automobile Information Object

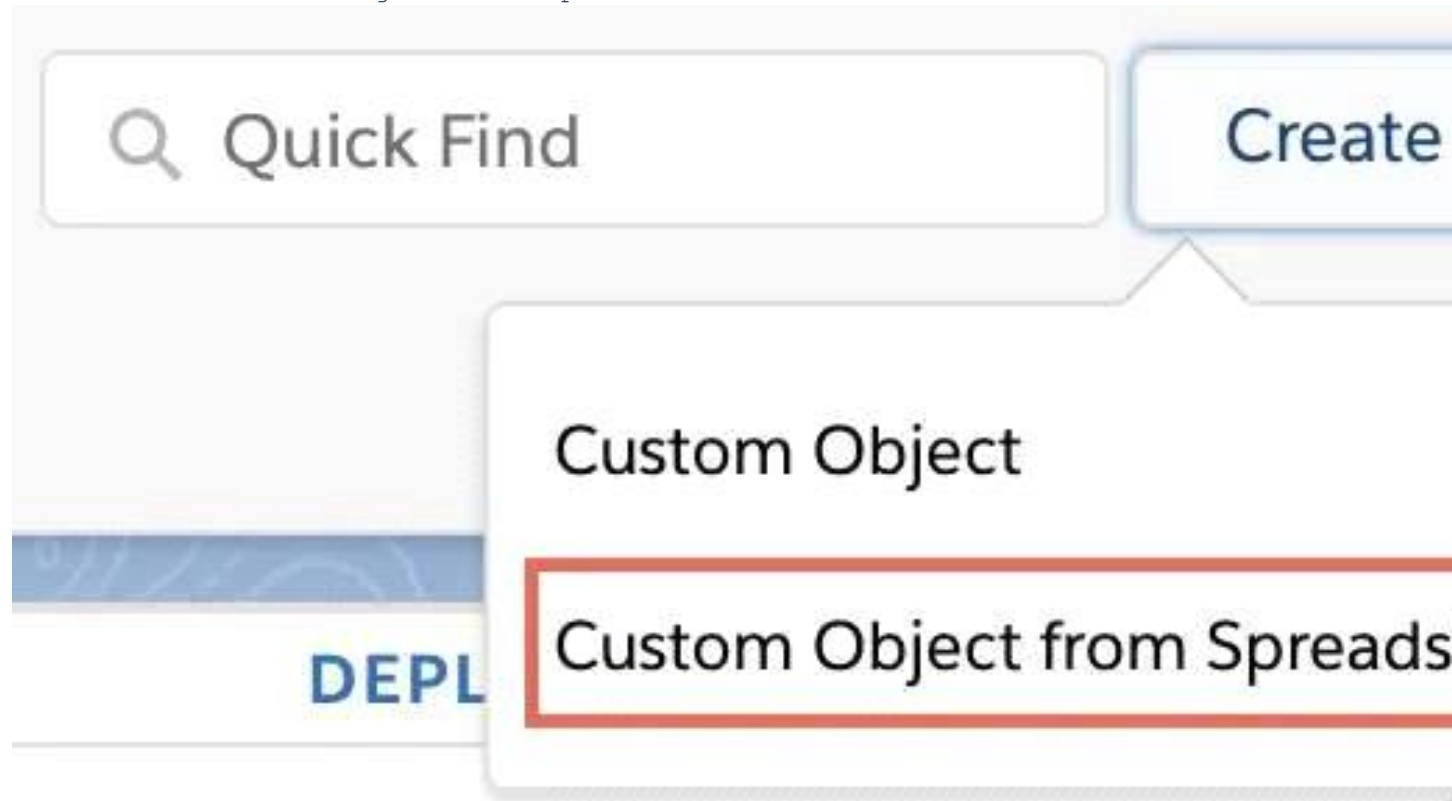
- Download and open [this spreadsheet](#), save it as AutomobileInformation.csv.
- Make sure to download the File into CSV format.
Note : Make sure to have the name of the file as "Automobile Information".

- Log into your salesforce account, click  , then select Setup.
1. Click the Object Manager tab.



2. Click Create.

3. Select Custom Object from Spreadsheet.



4. Click Login With Salesforce.
5. Enter your Salesforce account username and password. (which you have created in the Milestone 1, Activity 1)
6. Click Log In.
7. Click Allow.
8. Click Upload.
9. 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.

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 * Field Labels Row: 1

Import 9 rows of Data? No, skip import **Yes, import data**

Fields 9 of 9 to import ☐ Hide mapped fields

IMPORT FILE FIELD NAME		SALESFORCE FIELD NAME	SALESFORCE FIELD TYPE	ADD TO LAYOUTS
✓ Name Of Manufacturer	×	Name Of Manufacturer	Text	<input checked="" type="checkbox"/>
✓ Model	×	Model	Text	<input checked="" type="checkbox"/>
✓ Engine Number	×	Engine Number	Text	<input checked="" type="checkbox"/>
✓ VIN	×	VIN	Text	<input checked="" type="checkbox"/>
✓ Total Number of Cylinders	×	Total Number of Cylinders	Picklist	<input checked="" type="checkbox"/>
✓ Colour	×	Colour	Picklist	<input checked="" type="checkbox"/>
✓ Built date	×	Built date	Phone	<input checked="" type="checkbox"/>
✓ Price	×	Price	Currency	<input checked="" type="checkbox"/>
✓ Quantity	×	Quantity	Integer	<input checked="" type="checkbox"/>

[Back](#) 1 2

1. Click Next and enter the following settings.
2. 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.

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

Fields 5 of 5 to import ☐ Hide mapped fields

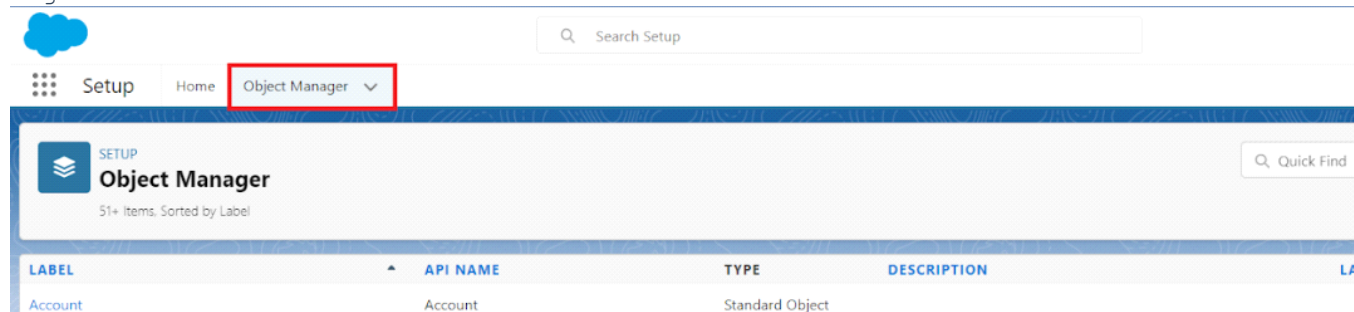
IMPORT FILE FIELD NAME		SALESFORCE FIELD NAME	SALESFORCE FIELD TYPE	ADD TO LAYOUTS
✓ Invoice ID	×	Invoice ID	Text	<input checked="" type="checkbox"/>
✓ Total Price	×	Total Price	Integer	<input checked="" type="checkbox"/>
✓ Quantity	×	Quantity	Integer	<input checked="" type="checkbox"/>
✓ Unit Price	×	Unit Price	Integer	<input checked="" type="checkbox"/>
✓ Purchase Date	×	Purchase Date	Date	<input checked="" type="checkbox"/>

Create Automobile Object

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

To create an object:

- 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

Setup Search Setup

Setup Home Object Manager

SETUP New Custom Object

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

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". Note that the Record Name field is always required.

Record Name Example: Account Name

Data Type

1. Enter Record Name Label and Format
 - Record Name >> Opportunity Automobile Id
 - Data Type >> Auto Number
 - Display Format >> OA-{0000}
 - Starting Number >> 1

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

Opportunity Automobile

Example: Account

Plural Label

Opportunity Automobiles

Example: Accounts

Starts with vowel sound

☐

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

Object Name

Opportunity_Automobile

Example: Account

Description

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window
 ☐ Open a window using a Visualforce page

Content Name

--None--

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".

Record Name

Opportunity Automobile Id

Example: Account Name

Data Type

Auto Number

Display Format

OA-{0000}

Example: A-{0000} [What Is This?](#)

Starting Number

1

1. Click on Allow reports.
2. Allow search
3. >> Save.

Tabs

Creating A Custom Tab

- Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application fu

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning co you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

[New](#)[What Is This?](#)

No Custom Object Tabs have been defined

Web Tabs

[New](#)[What Is This?](#)

No Web Tabs have been defined

- 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.


Custom Object Tab

Opportunity Automobiles

Below is the information for the custom tab. Click Edit to change the custom tab.

Custom Tab Definition Detail

[Edit](#) [Delete](#)

Tab Label	Opportunity Automobiles	Tab Style	
Object	Opportunity Automobile	Splash Page Custom Link	
Description			
Created By	Mohammad Sameer , 27/11/2023, 2:48 pm	Modified By	Mohammad Sa

Note: Tabs for Automobile Information & Invoice objects do get created automatically. We do not need to create tabs for those objects.

The Lightning App

Create A Lightning App

- Go to setup page >> search "app manager" in quick find >> select "app manager" >> click on New lightning App.

App Manager | Salesforce

sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Search Setup

Setup Home Object Manager

Q app manager

Apps

App Manager

Didn't find what you're looking for? Try using Global Search.

Lightning Experience App Manager

Clone Apps (Beta)

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling [Enable release notes](#).

Enable App Cloning ☐ Disabled

35 Items • Sorted by App Name • Filtered by All app menu items • Tablet Type

	App Name	Developer Name	Description	Last
1	All Tabs	AllTabSet		04/1
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	04/1
3	App Launcher	AppLauncher	App Launcher tabs	04/1
4	Bot Solutions	LightningBot	Discover and manage business solutions designed for your industry.	04/1
5	Chatter Desktop	ChatterDesktop	Chatter Desktop is an Adobe AIR-based desktop application that lets Chatter users stay connecte...	28/1
6	Chatter Mobile for BlackBerry	ChatterforBlackBerry	The Salesforce.com Chatter Mobile app lets you access Chatter data on the go. Use it to view fee...	28/1
7	College Management System	Nadeem	demo app	04/1
8	Community	Community	Salesforce CRM Communities	04/1
9	Content	Content	Salesforce CRM Content	04/1
10	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	04/1

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

New Lightning App

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 ⓘ
Name your app...

* Developer Name ⓘ
Enter a developer name...

Description ⓘ
Enter a description...

App Branding

Image ⓘ

Primary Color Hex Value ⓘ

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

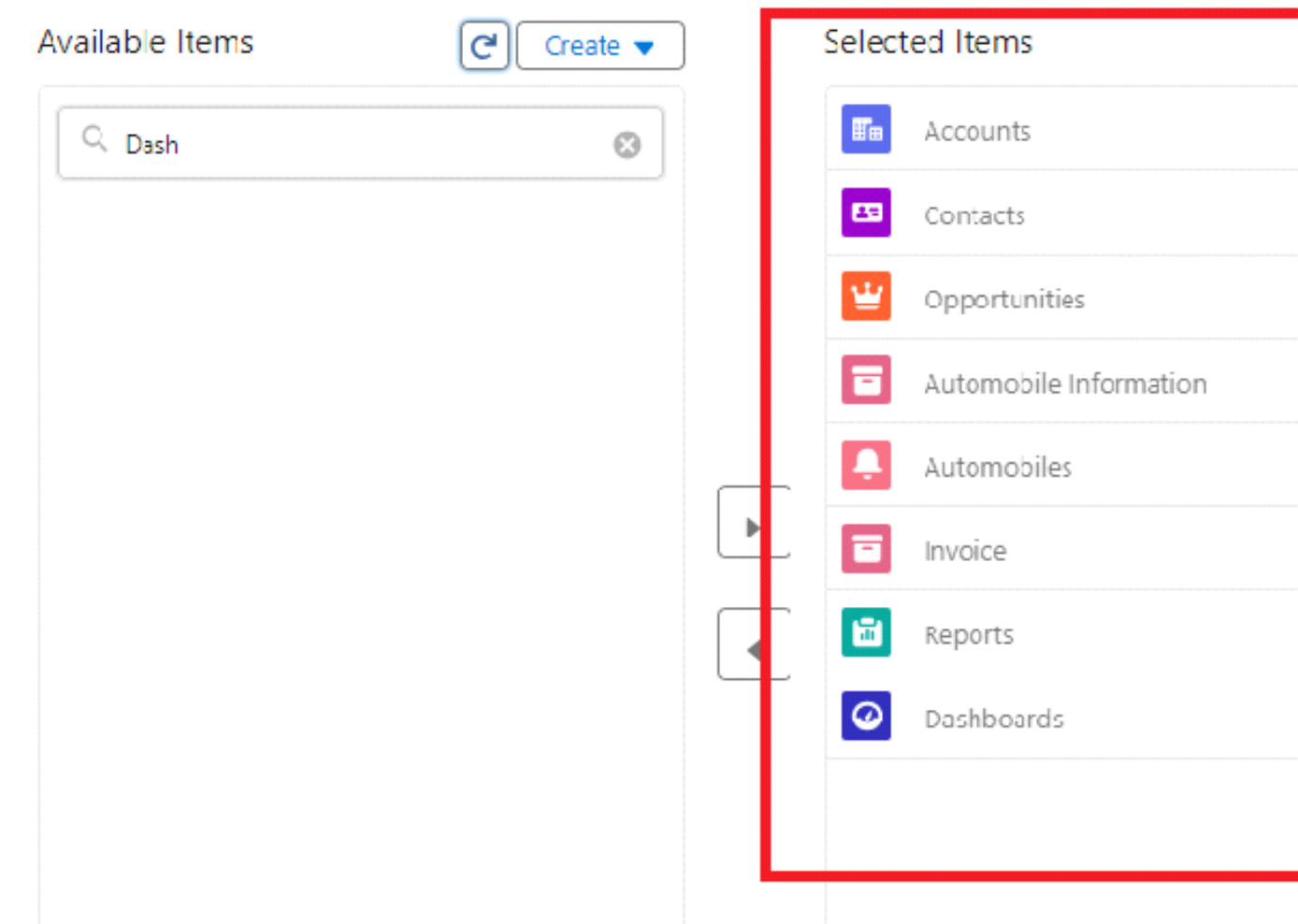
App Launcher Preview

- Add Navigation Items:

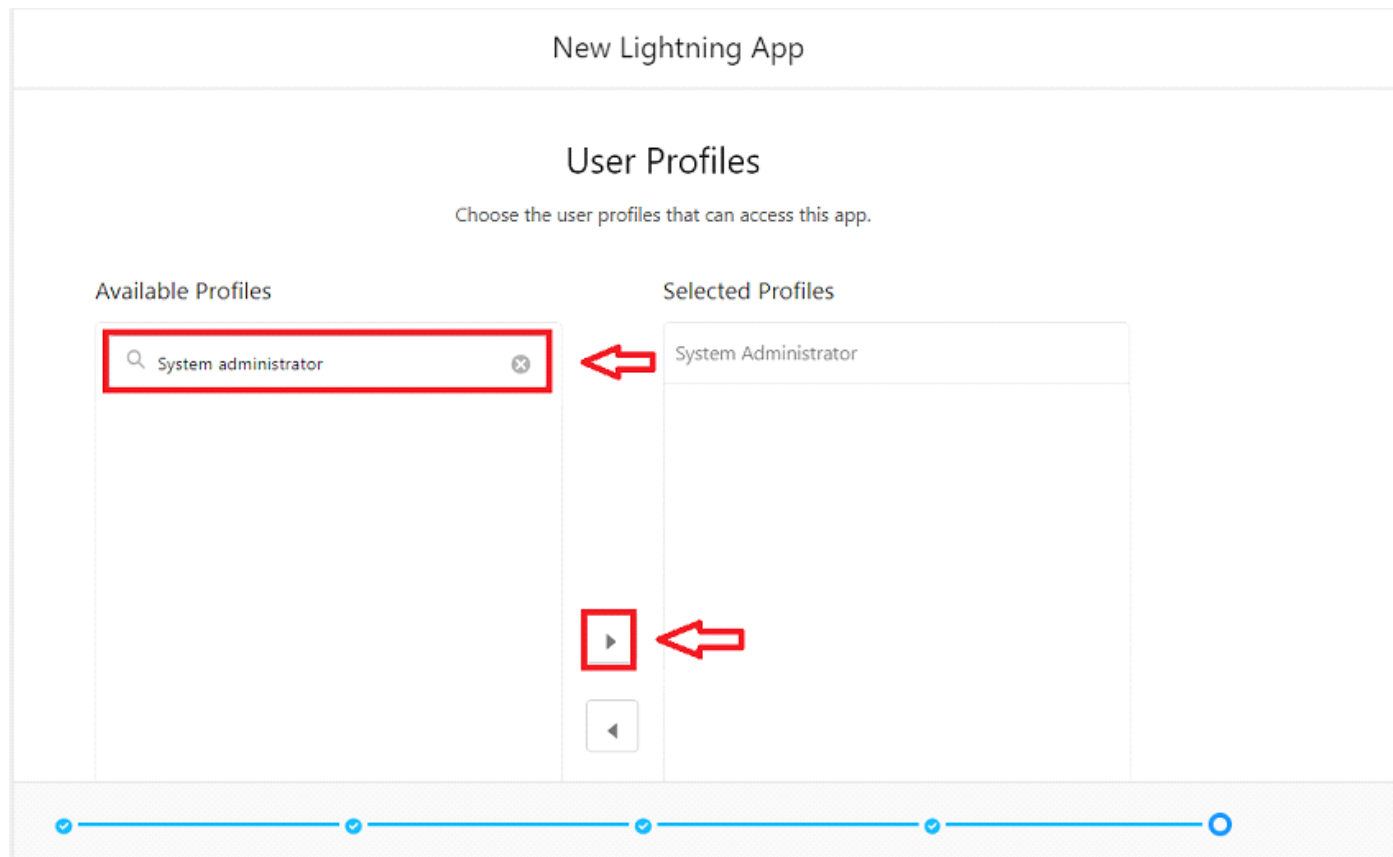
New Lightning App

Navigation Items

by appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items. Items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.



- 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.



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

