

Project Name: Sales Automobile Using Salesforce CRM

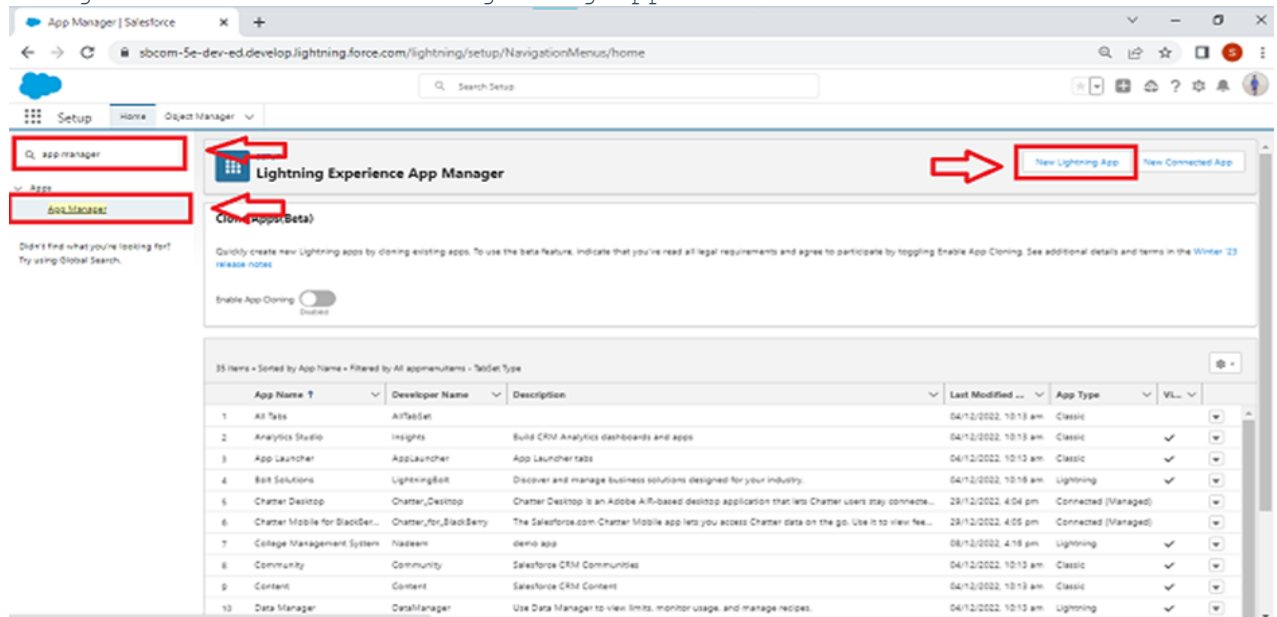
Team ID: LTVIP2024TMID11576

Team Leader: V Shilpa

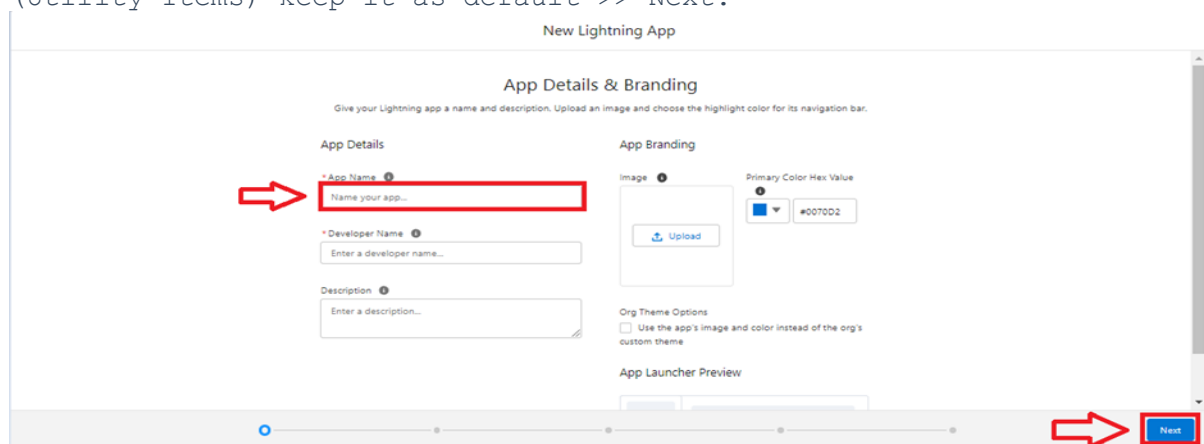
Team member: R Likitha

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.

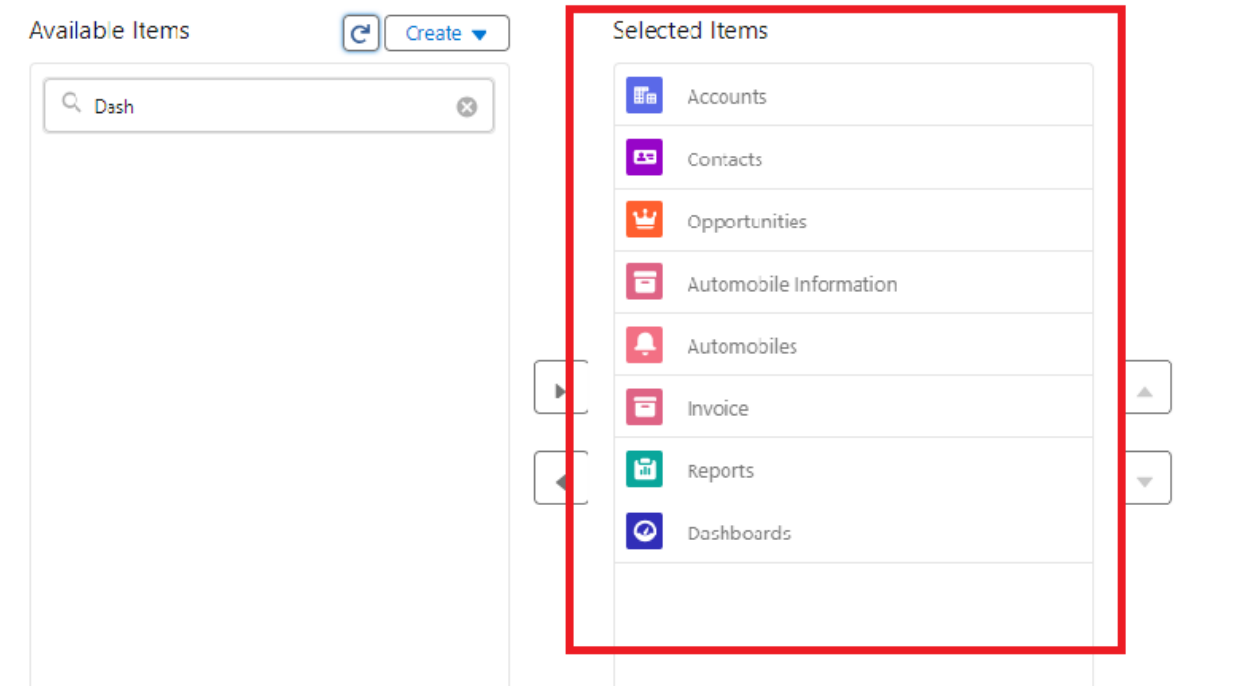


4. Add Navigation Items:

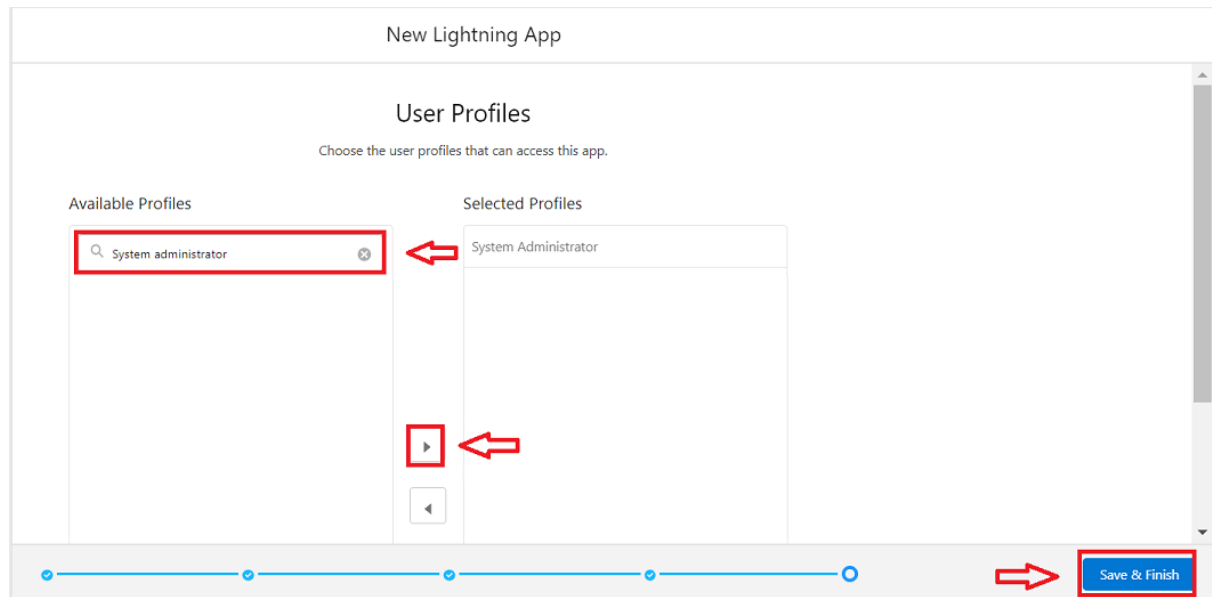
New Lightning App

Navigation Items

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



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.



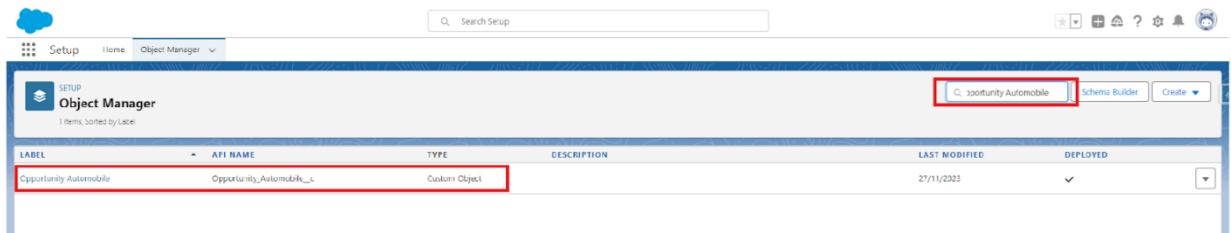
6. Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.

Fields & Relationships

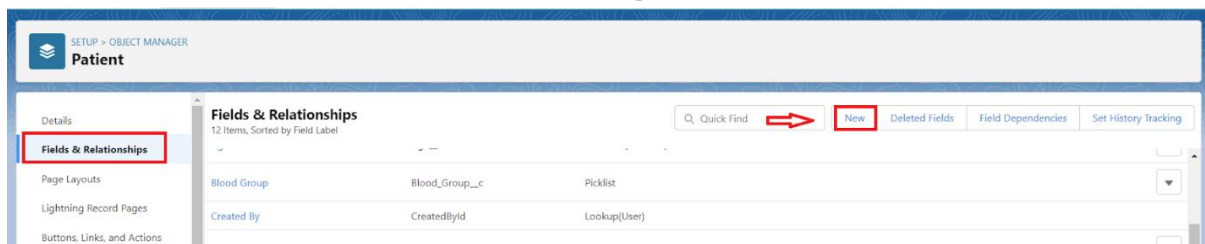
Creating Opportunity Master Detail Relationship Field In Opportunity AutoMobile Object

To create fields in an object:

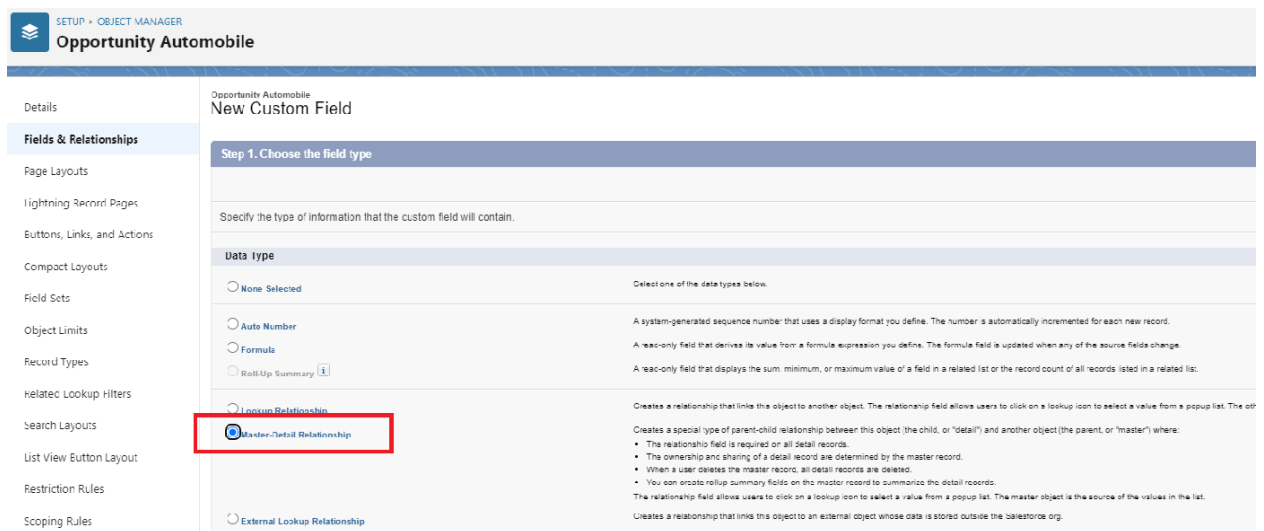
1. Go to setup >> click on Object Manager >> type object name(Opportunity Automobile) in quick find bar>> click on the object.



2. Now click on "Fields & Relationships" >> New



3. Select Data type as "Master Details Relationship".



4. Click on Next

Step 2. Choose the related object

Select the other object to which this object is related.

Related To:

Previous Next

5. Fill the above as following:

- o Field Label: gets auto Generated(Opportunity)
- o Field Name : gets auto generated(Opportunity)
- o Click on Next >> Next >> Save and new.

Opportunity Automobile
New Relationship

Step 3. Enter the label and name for the lookup field

Field Label:

Field Name:

Description:

Help Text:

Child Relationship Name:

Sharing Setting: ☐ Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.

☒ Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Allow reparenting: ☐ Child records can be reparented to other parent records after they are created.

Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity.

Lookup Filter

Optionally, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

[Show Filter Settings](#)

Previous Next Cancel

Creating The AutoMobile Information Lookup Field In Opportunity Automobile Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name (Opportunity Automobile) in quick find bar >> click on the object.

Setup Home Object Manager

Q Search Setup

Q: opportunity Automobile Schema Builder Create

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Opportunity Automobile	Opportunity_Automobile__c	Custom Object		27/11/2023	✓

2. Now click on "Fields & Relationships" >> New

Setup > OBJECT MANAGER Patient

Details Fields & Relationships 12 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

Blood Group	Blood_Group__c	Picklist
Created By	CreatedById	Lookup(User)

3. Select Data type as "Lookup Relationship".

SETUP > OBJECT MANAGER
Opportunity Automobile

Details
Specify the type of information that the custom field will contain.

Fields & Relationships

Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters

Data Type

☐ None Selected
Select one of the data types below.

☐ Auto Number
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

☐ Formula
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

☐ Roll-Up Summary
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

☒ **Lookup Relationship**
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The relationship field is required on all detail records.

☐ Master-Detail Relationship
Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
• The relationship field is required on all detail records.
• The ownership and sharing of a detail record are determined by the master record.
• When a user deletes the master record, all detail records are deleted.
• You can create rollup summary fields on the master record to summarize the detail records.
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

4. Click on Next

Opportunity Automobile
New Relationship

Step 2. Choose the related object

Select the other object to which this object is related.

Related To: **Automobile Information**

Previous Next Cancel

5. Fill the above as following:

- Field Label: Automobile
- Field Name : Automobile

6. Click on Next >> Next>> Save and new.

Opportunity Automobile
New Relationship

Step 3. Enter the label and name for the lookup field

Field Label: **Automobile**

Field Name: **Automobile**

Description:

Help Text:

Child Relationship Name: **Opportunity Automobiles**

Required: ☐ Always require a value in this field in order to save a record.

What to do if the lookup record is deleted?: ☒ Clear the value of this field. You can't choose this option if you make this field required.

☐ Don't allow deletion of the lookup record that's part of a lookup relationship.

Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity.

Lookup Filter

Optionally, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

Show Filter Settings

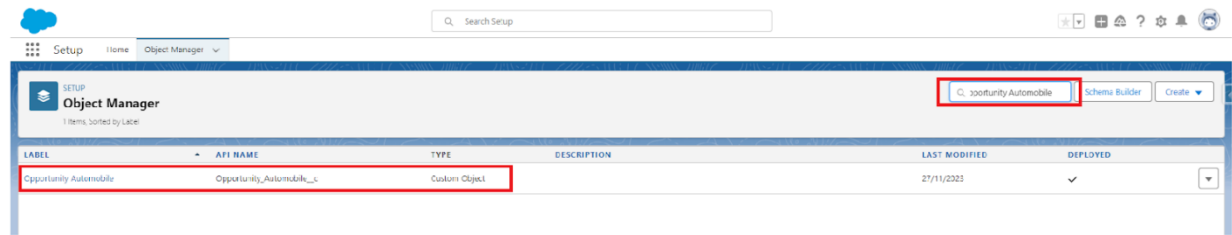
Previous Next Cancel

Creating The AutoMobile Information Lookup Field In Opportunity Automobile Object

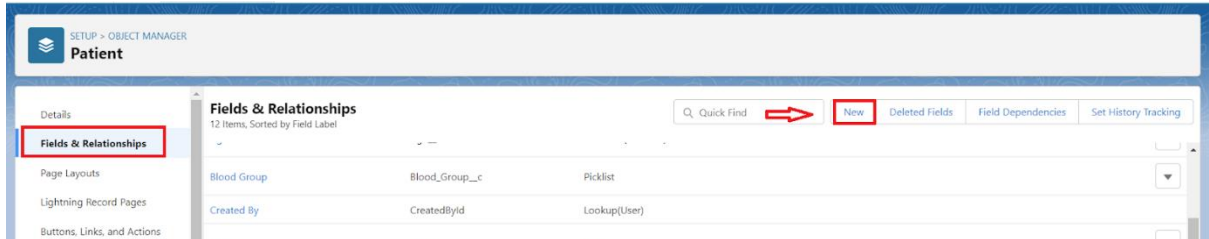
To create fields in an object:

- Go to setup >> click on Object Manager >> type object name (Opportunity Automobile) in quick find bar>> click on the

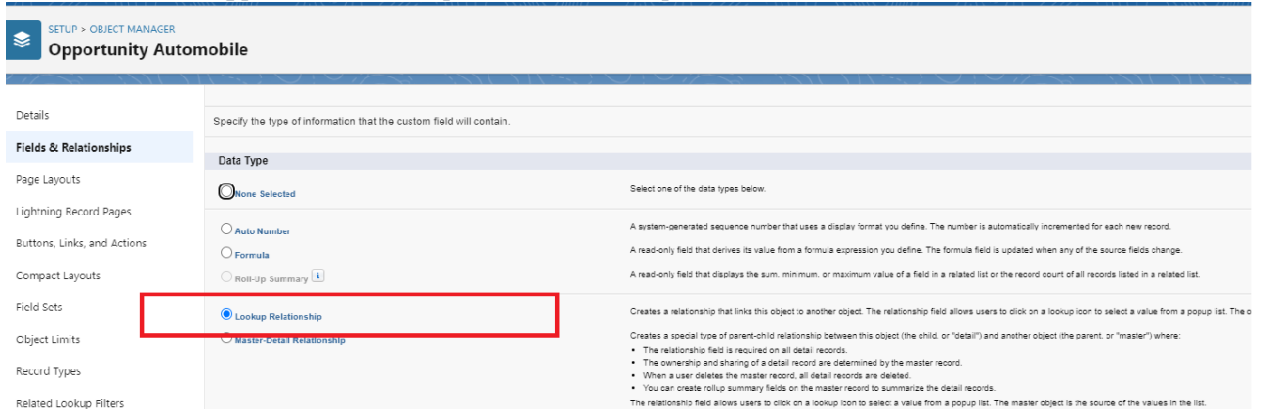
object.



2. Now click on "Fields & Relationships" >> New



3. Select Data type as "Lookup Relationship".



4. Click on Next



5. Fill the above as following:

- Field Label: Automobile
- Field Name : Automobile

6. Click on Next >> Next>> Save and new.

Opportunity Automobile
New Relationship

Step 3 of 6

Field Label:

Field Name:

Description:

Help Text:

Child Relationship Name:

Required: ☐ Always require a value in this field in order to save a record.
☒ Clear the value of this field. You can't choose this option if you make this field required.

What to do if the lookup record is deleted?:
☐ Don't allow deletion of the lookup record that's part of a lookup relationship.
☒ Add this field to existing custom report types that contain this entity.

Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity.

Lookup Filter

Optionally, create a filter to limit the records available to users in the lookup field. [Tailor me now!](#)

[Show Filter Settings](#)

Previous Next Cancel

Creating Formula Field In Opportunity Automobile Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name (Opportunity Automobile) in quick find bar >> click on the object.
1. Now click on "Fields & Relationships" >> New.
2. Select Data type as "Formula" and click Next.
3. 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.

Opportunity Automobile
New Custom Field

Step 2 of 5

Field Label:

Field Name:

Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity.

Formula Return Type

☐ None Selected

Select one of the data types below:

☒ Currency

☐ Date

☐ Date/Time

☐ Number

☐ Percent

☐ Text

☐ Time

Options

Decimal Places: Example: 999.00

Previous Next Cancel

4. Under Advanced Formula write down the formula : `Automobile__r.Price__c`

The screenshot shows the Salesforce formula editor interface. At the top, there are tabs for 'Simple Formula' and 'Advanced Formula'. Below these are buttons for 'Insert Field' and 'Insert Operator'. The main area contains the formula: `Unit Price (Currency) = Automobile__r.Price__c`. A red box highlights the formula text. At the bottom, there is a 'Check Syntax' button and a message: 'No syntax errors in merge fields or functions. (Compiled size: 31 characters)'.

5. click "Check Syntax" and Next >> Next >> Save & New.

Creating The Formula Field In Opportunity Automobile Object

To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name (Opportunity Automobile) in quick find bar >> click on the object.
1. Now click on "Fields & Relationships" >> New.
2. Select Data type as "Formula" and click Next.
3. 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.

The screenshot shows the 'New Custom Field' wizard for the 'Opportunity Automobile' object. It is at 'Step 2. Choose output type'. The 'Field Label' is 'Total Price' and the 'Field Name' is 'Total_Price'. The 'Formula Return Type' is set to 'Currency'. The 'Decimal Places' are set to 2. The 'Next' button is highlighted with a red box.

4. Under Advanced Formula write down the formula
: `Unit_Price__c * Quantity__c`

Example: [More Examples...](#)

Total Price (Currency) =

Unit_Price__c * Quantity__c

No syntax errors in merge fields or functions. (Compiled size: 75 characters)

5. click "Check Syntax" and Next >> Next >> Save.

Updating Field In Invoice Object

To Update fields in an object:

1. Go to setup ? click on Object Manager ? type object name(Invoice) in quick find bar? click on the object.
2. Now click on "Fields & Relationships" , Click on the edit of Invoice Id field.

SETUP > OBJECT MANAGER
Invoice

Details

Fields & Relationships
8 Items, Sorted by Field Label

Q, Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User.Group)		✓
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)		
Invoice ID	Name	Text(30)		✓

Edit

SETUP > OBJECT MANAGER
Invoice

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

Field
Invoice ID

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account referenced via the API."

Record Name Invoice ID
Example: Account Name

Data Type Auto Number

Display Format I-{0000}
Example: A-{0000} What Is This?

Starting Number 1

Save Cancel

Recent Accounts	
Account Name	City
Acme	New York
Global Media	Toronto
salesforce.com	San Francisco

3. Select Data type as "Auto Number " and click Next.
 - a. Display Format :- I-{0000}
 - b. StartingNumber:-
4. Click Save.

5. Creating Remaining Fields In Objects

6. Now create the remaining fields using the data types mentioned.
- 7.

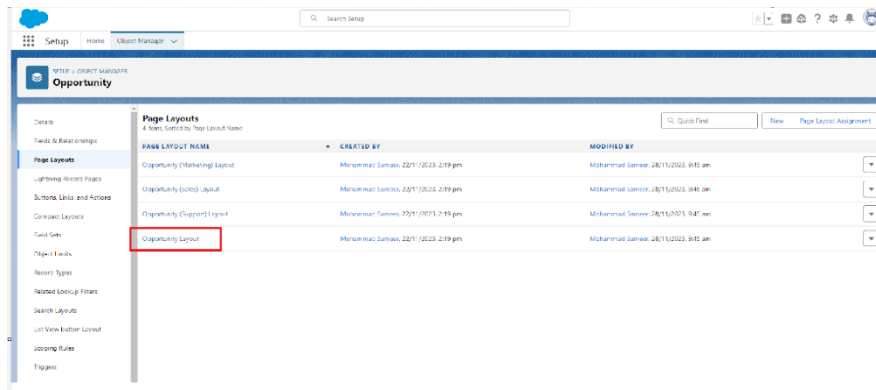
s.no	Object name	Fields	
1	Invoice	Field Name	Opportunity
		Data type	Master Detail relationship Object : Opportunity

Page Layouts

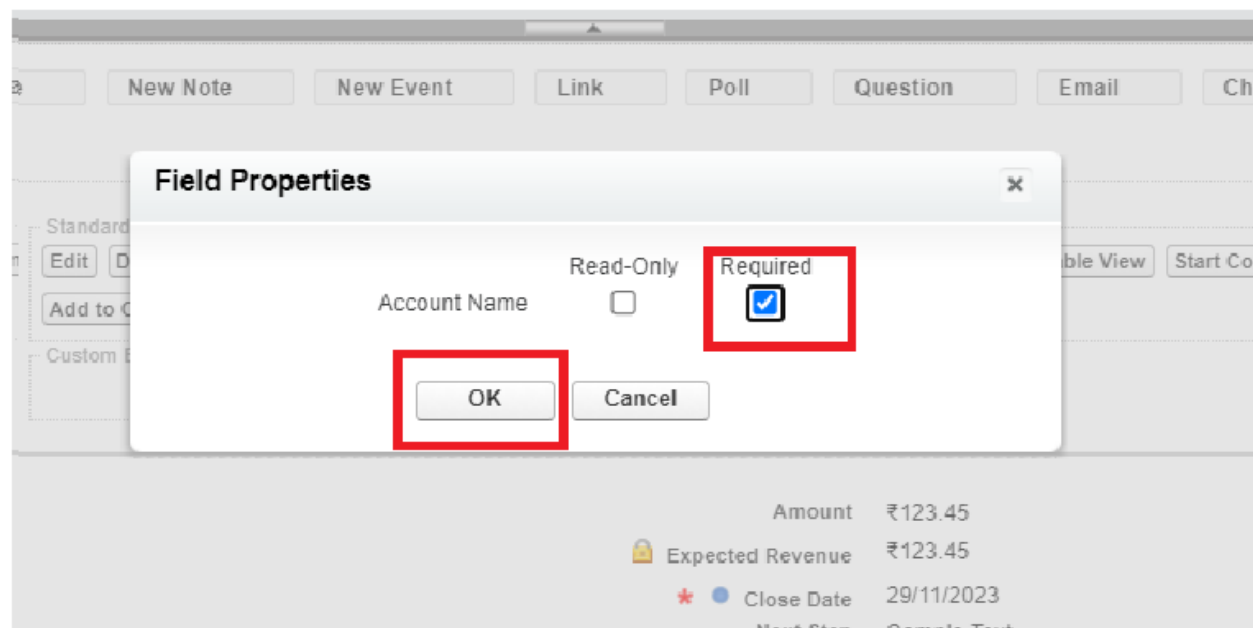
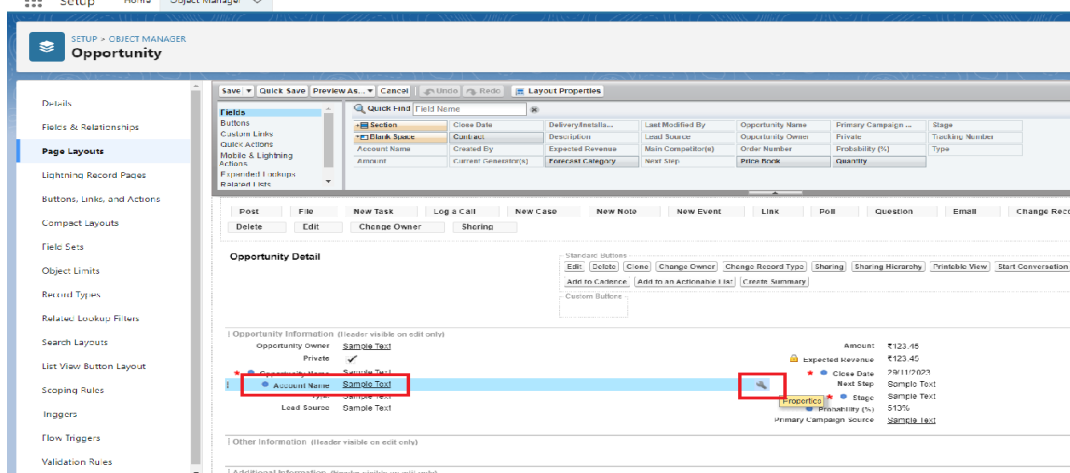
Edit The Page Layout For Opportunity Object

Step 1: Go to Setup >> Click on Object Manager >> On the search bar, select Opportunity Layout. You can notice Page Layouts on the left panel

Step 2: Click on Page Layouts, Click on 'Opportunity Layouts'.



Step 3: In the Opportunity Detail Section, you can see various fields. Go on Account And Click on that Properties icon of Account name Field.



Step 4: check the Required box for Account name and click on Ok.
Step 5: Click on Save.

Edit The Page Layout For Automobiles Information

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

Step 2: Click on Page Layouts. Click on 'Automobile Information Layout'.

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
List View Button Layout
Restriction Rules

Page Layouts
1 Items, Sorted by Page Layout Name

Quick Find

New Page Layout Assignment

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Automobile Information Layout	Mohammad Sameer: 27/11/2023, 12:49 pm	Mohammad Sameer: 27/11/2023, 10:32 pm

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
List View Button Layout
Restriction Rules
Scoping Rules
Triggers
Flow Triggers

Automobile Information Layout

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

Quick Find Field Name

Fields
Buttons
Quick Actions
Mobile & Lightning Actions
Expanded Lookups
Related Lists
Report Charts

Section Created By Name Of Manufact... Total Number of C...
Blank Space Engine Number Owner VIN
Built date Last Modified By Price
Colour Model Quantity

Automobile Information Sample

Highlights Panel
Customize the highlights panel for this page layout...

Quick Actions in the Salesforce Classic Publisher
Actions in this section are currently inherited from the global publisher layout. You can override the global publisher layout to set a customized list of actions for the publisher on pages that use this layout.

Salesforce Mobile and Lightning Experience Actions
Actions in this section are predefined by Salesforce. You can override the predefined actions to set a customized list of actions on Lightning Experience and mobile app pages that use this layout. If you customize the actions in the Quick Actions in the Salesforce Classic Publisher section, and have saved the layout, then this section inherits that set of actions by default when you click to override.

Automobile Information Detail
Standard Buttons: Edit Delete Clone Change Owner Change Record Type Printable View Sharing Sharing Hierarchy Submit for Approval Custom Buttons

Step 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.

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
List View Button Layout
Restriction Rules
Scoping Rules
Triggers

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

Quick Find Field Name

Section	Created By	Name Of Manufact...	Total Number of C...
Blank Space	Engine Number	Owner	VIN
Built date	Last Modified By	Price	
Colour	Model	Quantity	

Automobile Information Detail
Edit Delete Clone Change Owner Change Record Type Printable View Sharing Sharing Hierarchy Submit for Approval Custom Buttons

Information (Header visible on edit only)

Name Of Manufacturer Sample Text
Model Sample Text
Engine Number Sample Text
VIN Sample Text
Total Number of Cylinders Sample Text
Colour Sample Text
Built date 1-415-555-1212
Price £123.45
Quantity 95,650

Owner Sample Text

System Information (Header visible on edit only)

Created By Sample Text
Last Modified By Sample Text

Custom Links (Header visible on detail only)

Step 4 : Adjust the Fields as given below for A good looking view.

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
List View Button Layout
Restriction Rules
Scoping Rules
Triggers

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

Quick Find Field Name

Section	Created By	Name Of Manufact...	Total Number of C...
Blank Space	Engine Number	Owner	VIN
Built date	Last Modified By	Price	
Colour	Model	Quantity	

Automobile Information Detail
Edit Delete Clone Change Owner Change Record Type Printable View Sharing Sharing Hierarchy Submit for Approval Custom Buttons

Information (Header visible on edit only)

Name Of Manufacturer Sample Text
Model Sample Text
Engine Number Sample Text
VIN Sample Text
Total Number of Cylinders Sample Text
Colour Sample Text
Built date 1-415-555-1212
Price £123.45
Quantity 95,650

Owner Sample Text

Colour Sample Text
VIN Sample Text
Total Number of Cylinders Sample Text

System Information (Header visible on edit only)

Created By Sample Text
Last Modified By Sample Text

Custom Links (Header visible on detail only)

Mobile Cards (Salesforce mobile only) 1

Drag expanded lookups and mobile-enabled Visualforce pages here to display them as mobile cards.

Step 5 : Click on Save.

