

Sales Automobile Using Salesforce CRM

1. Project Overview

This project focuses on implementing a comprehensive Sales Automobile CRM Solution using Salesforce, designed to address the challenges of managing automotive sales and enhancing customer engagement. The goal is to streamline sales operations, improve lead management, and support customer interactions through Salesforce's powerful CRM tools. By implementing this solution, the aim is to optimize dealership processes, enhance customer experience, and increase conversion rates.

Objectives

Business Goals:

- Increase sales efficiency by automating lead management.
- Improve customer retention by tracking interactions and follow-ups.
- Enhance reporting to support data-driven decisions.

Specific Outcomes:

- Centralized customer data for streamlined tracking.
- Automated reminders for follow-ups and service schedules.
- Dashboards for real-time sales performance monitoring.

2. Salesforce Key Features and Concepts Utilized

- Sales Cloud for lead, opportunity, and customer management.
- Automation Tools (e.g., Process Builder, Flows) for automating follow-up reminders and lead assignments.
- Reports and Dashboards to provide insights into sales performance and customer demographics.
- Mobile Accessibility to support field sales and quick updates from any location.

3. Detailed Steps to Solution Design

- Data Model: Define and create objects for Leads, Opportunities, Vehicles, and Customers.
- User Interface Design: Customize page layouts and Lightning record pages to optimize user experience.
- Business Logic: Implement automation through flows for lead nurturing and customer follow-ups.

The image displays two screenshots of the Salesforce Lightning interface. The top screenshot shows the 'Setup' page with a search bar at the top. On the left, a sidebar contains navigation links: Setup, Home, Object Manager, and a search bar. Below these are sections for 'Apps' (Salesforce Chatter, Sales Console, Sales, Salesforce Scheduler Setup, Salesforce Automobile Using Salesforce CRM), 'Items' (Salesforce Scheduler Setup Assistant, View More), and 'Administration' (Users, Data, Email, Subscription Management, Apps, Feature Settings, Slack, Heroku, MuleSoft, Einstein, Objects and Fields). The main content area features three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Below these is a 'Most Recently Used' section showing a table of recent items.

NAME	TYPE	OBJECT
Automobile Information	Custom Object Definition	
Opportunity Automobile	Custom Object Definition	
Invoice	Custom Object Definition	
SFDC_DevConsole	Debug Level	
Marketing	Custom App	

The bottom screenshot shows the 'Accounts' page. The top navigation bar includes 'Sales Automobile U...' and a search bar. Below this is a sub-navigation bar with links: Accounts, Contacts, Opportunities, Automobile Information, Opportunity Automobiles, Invoice, Reports, and Dashboards. The main content area displays a table of accounts, sorted by Account Name. The table has columns for Account Name, Account Site, Billing State/Province, Phone, Type, and Account Owner Alias. The table contains 13 rows of data.

Account Name	Account Site	Billing State/Province	Phone	Type	Account Owner Alias
1 Burlington Textiles Corp of America		NC	(336) 222-7000	Customer - Direct	MAAhi
2 Dickenson plc		KS	(785) 241-6200	Customer - Channel	MAAhi
3 Edge Communications		TX	(512) 757-6000	Customer - Direct	MAAhi
4 Express Logistics and Transport		OR	(503) 421-7800	Customer - Channel	MAAhi
5 GenePoint		CA	(650) 867-3450	Customer - Channel	MAAhi
6 Grand Hotels & Resorts Ltd		IL	(312) 596-1000	Customer - Direct	MAAhi
7 Pyramid Construction Inc.			(014) 427-4427	Customer - Channel	MAAhi
8 Sample Account for Entitlements					autoproc
9 sForce		CA	(415) 901-7000		MAAhi
10 United Oil & Gas Corp.		NY	(212) 842-5500	Customer - Direct	MAAhi
11 United Oil & Gas, Singapore		Singapore	(650) 450-8810	Customer - Direct	MAAhi
12 United Oil & Gas, UK		UK	+44 191 4956203	Customer - Direct	MAAhi
13 University of Arizona		AZ	(520) 773-9050	Customer - Direct	MAAhi

Search...

Sales Automobile U... Accounts Contacts Opportunities Automobile Information Opportunity Automobiles Invoice Reports Dashboards

Contacts
My Contacts

Created This Quarter Owner Me

Total Contacts: 20
No Activity: 20
Idle: 0
No Upcoming: 0
Overdue: 0
Due Today: 0
Upcoming: 0

20 items • Filtered by Created Date, Me, Total Contacts

Add to Campaign Send List Email Assign Label

	Name	Title	Account Name	Last Activity	Actions
1	Rose Gonzalez	SVP, Procurement	Edge Communications		
2	Sean Forbes	CFO	Edge Communications		
3	Jack Rogers	VP, Facilities	Burlington Textiles Corp of America		
4	Pat Shumiller	SVP, Administration and Finance	Pyramid Construction Inc.		
5	Andy Young	SVP, Operations	Dickenson plc		
6	Tim Barr	SVP, Administration and Finance	Grand Hotels & Resorts Ltd		
7	John Bond	VP, Facilities	Grand Hotels & Resorts Ltd		
8	Stella Pavlova	SVP, Production	United Oil & Gas Corp.		
9	Lauren Boyle	SVP, Technology	United Oil & Gas Corp.		
10	Barbara Levy	SVP, Operations	Express Logistics and Transport		
11	Josh Davis	Director, Warehouse Mgmt	Express Logistics and Transport		
12	Jane Gray	Dean of Administration	University of Arizona		

Search...

Sales Automobile U... Accounts Contacts Opportunities Automobile Information Opportunity Automobiles Invoice Reports Dashboards

Opportunities
All Opportunities

31 items • Sorted by Opportunity Name • Filtered by All opportunities • Updated a few seconds ago

Search this list...

New Printable View Assign Label

	Opportunity Name	Account Name	Amount	Close Date	Stage	Opportunity Owner Alias
1	Burlington Textiles Weaving Plant Generator	Burlington Textiles Corp of America	\$2,35,000.00	06/09/2024	Closed Won	MAKH
2	Dickenson Mobile Generators	Dickenson plc	\$15,000.00	13/09/2024	Qualification	MAKH
3	Edge Emergency Generator	Edge Communications	\$75,000.00	31/10/2024	Closed Won	MAKH
4	Edge Emergency Generator	Edge Communications	\$35,000.00	06/11/2024	Id. Decision Makers	MAKH
5	Edge Installation	Edge Communications	\$50,000.00	22/08/2024	Closed Won	MAKH
6	Edge SLA	Edge Communications	\$60,000.00	18/07/2024	Closed Won	MAKH
7	Express Logistics Portable Truck Generators	Express Logistics and Transport	\$80,000.00	26/07/2024	Value Proposition	MAKH
8	Express Logistics SLA	Express Logistics and Transport	\$1,20,000.00	27/07/2024	Perception Analysis	MAKH
9	Express Logistics Standby Generator	Express Logistics and Transport	\$2,20,000.00	28/07/2024	Closed Won	MAKH
10	GenePoint Lab Generators	GenePoint	\$60,000.00	25/10/2024	Id. Decision Makers	MAKH
11	GenePoint SLA	GenePoint	\$30,000.00	28/10/2024	Closed Won	MAKH
12	GenePoint Standby Generator	GenePoint	\$85,000.00	04/09/2024	Closed Won	MAKH
13	Grand Hotels Emergency Generators	Grand Hotels & Resorts Ltd	\$2,10,000.00	12/10/2024	Closed Won	MAKH
14	Grand Hotels Generator Installations	Grand Hotels & Resorts Ltd	\$3,50,000.00	14/10/2024	Closed Won	MAKH
15	Grand Hotels Guest Portable Generators	Grand Hotels & Resorts Ltd	\$2,50,000.00	31/10/2024	Value Proposition	MAKH
16	Grand Hotels Kitchen Generator	Grand Hotels & Resorts Ltd	\$15,000.00	23/07/2024	Id. Decision Makers	MAKH
17	Grand Hotels SLA	Grand Hotels & Resorts Ltd	\$90,000.00	25/07/2024	Closed Won	MAKH
18	Pyramid Emergency Generators	Pyramid Construction Inc.	\$1,00,000.00	09/09/2024	Prospecting	MAKH
19	United Oil Emergency Generators	United Oil & Gas Corp.	\$4,40,000.00	21/08/2024	Closed Won	MAKH
20	United Oil Installations	United Oil & Gas Corp.	\$2,70,000.00	28/08/2024	Negotiation/Review	MAKH
21	United Oil Installations	United Oil & Gas Corp.	\$2,70,000.00	27/08/2024	Closed Won	MAKH
22	United Oil Installations	United Oil & Gas Corp.	\$2,35,000.00	08/09/2024	Closed Won	MAKH

companiesandbox-3f-dev-ed.develop.lightning.force.com/lightning/o/Opportunity_Automobile__c/list?filterName=All

Sales Automobile U... Accounts Contacts Opportunities Automobile Information Opportunity Automobiles Invoice Reports Dashboards

Opportunity Automobiles

All

0 items • Sorted by Opportunity Automobile Id • Filtered by All opportunity automobiles • Updated a few seconds ago

Search this list...

No items to display.

Sales Automobile U... Accounts Contacts Opportunities Automobile information Opportunity Automobiles Invoice Reports Dashboards

Search...

Reports

Recent

3 items

	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Opportunities with Automobile Data		Private Reports	M R Akhil	6/11/2024, 2:01 pm	
Created by Me	Automobile Information Report		Private Reports	M R Akhil	6/11/2024, 1:54 pm	
Private Reports	New Opportunities Report		Private Reports	M R Akhil	6/11/2024, 1:51 pm	
Public Reports						
All Reports						

FOLDERS

- All Folders
- Created by Me
- Shared with Me

FAVORITES

- All Favorites

companyandbox-3f-dev-ed.develop.lightning.force.com/lightning/ui/Dashboard/home?queryScope=mev

Search...

Sales Automobile U... Accounts Contacts Opportunities Automobile Information Opportunity Automobiles Invoice Reports Dashboards

Dashboards

Recent

1 item

Search recent dashboards... New Dashboard New Folder

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Automobile Sales		Private Dashboards	M.R. Akhil	6/11/2024, 1:56 pm	

Created by Me

Private Dashboards

All Dashboards

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

Search...

Sales Automobile U... Accounts Contacts Opportunities Automobile Information Opportunity Automobiles Invoice Reports Dashboards

Report Automobile Information

Opportunities with Automobile Data

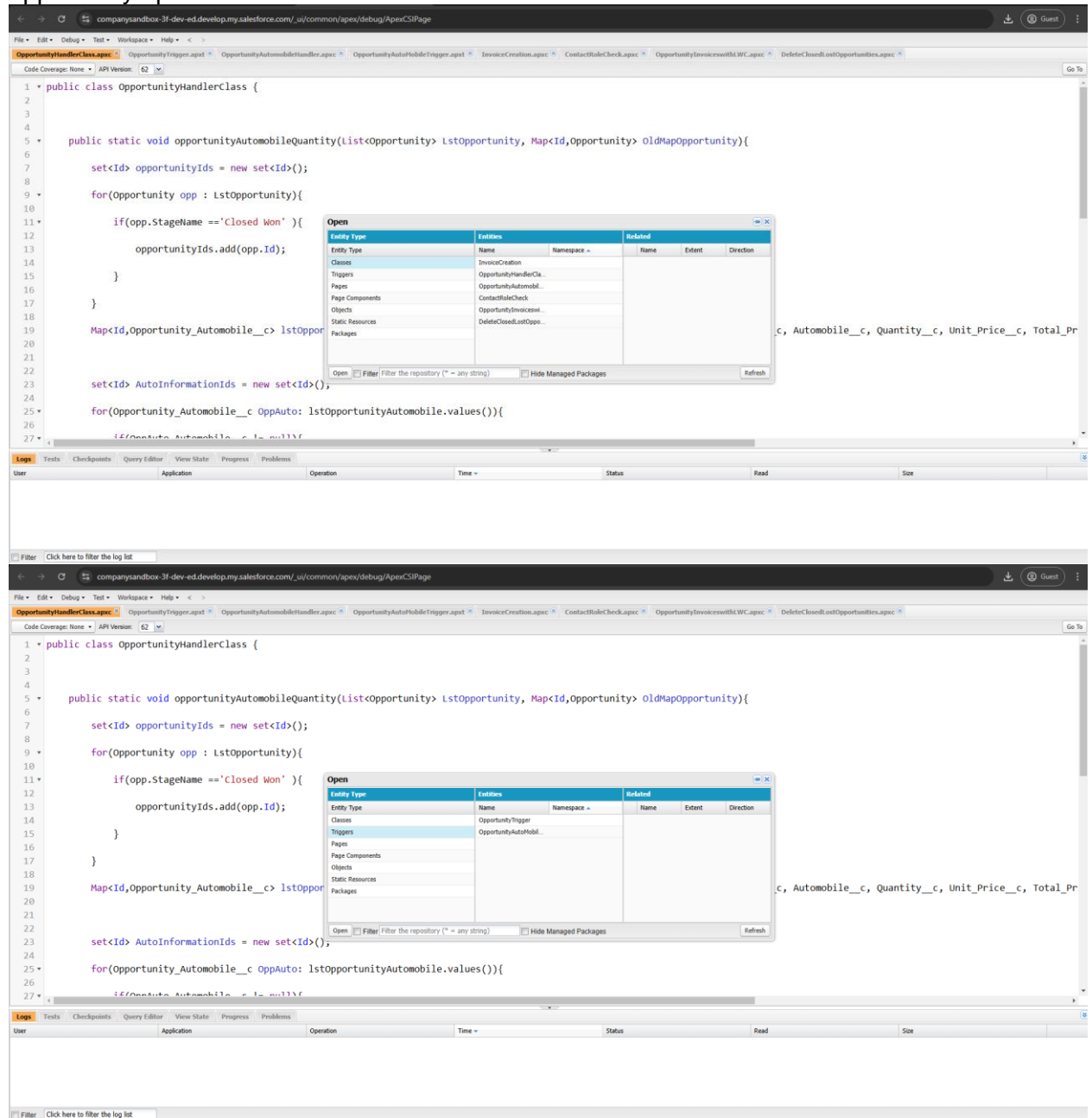
Enable Field Editing Add Chart Edit

Total Records: 1 Total Quantity: 12 Total Price: ₹20.00

Automobile Information: Name Of Manufacturer	Model	Built Date	Total Number of Cylinders	Colour	Quantity	Price	VIN
1 Toyota	Corolla	15-05-2022	4	Red	12	₹20.00	1HGCM826338004352
2					12	₹20.00	

4. Testing and Validation

Unit Testing: Conduct tests for Apex Classes and Triggers related to lead conversion and opportunity updates.



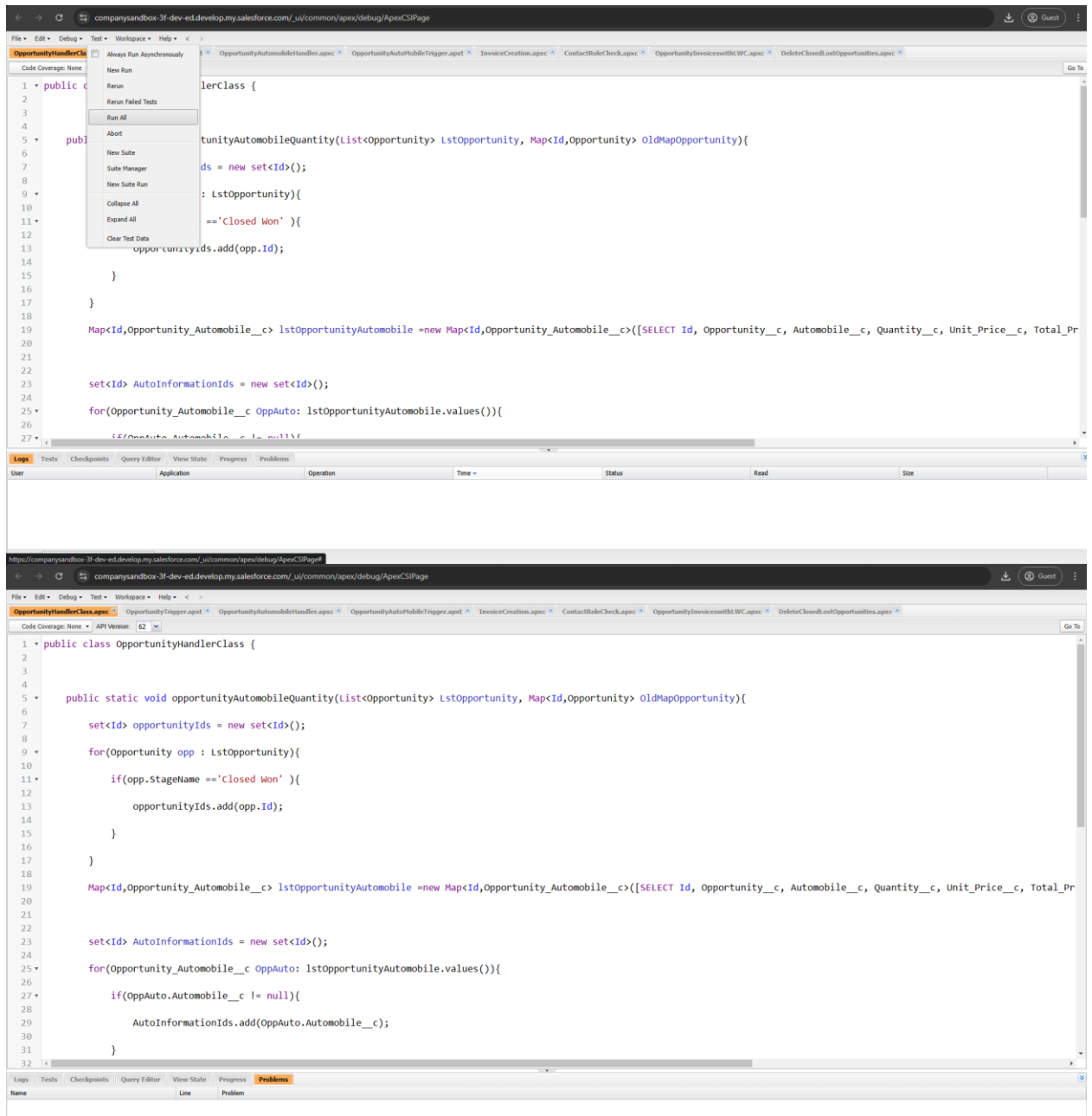
The screenshot displays the Salesforce IDE interface. The main editor shows the Apex class `OpportunityHandlerClass` with the following code:

```
1 public class OpportunityHandlerClass {
2
3
4
5     public static void opportunityAutomobileQuantity(List<Opportunity> lstopportunity, Map<Id,Opportunity> oldMapOpportunity){
6
7         set<Id> opportunityIds = new set<Id>();
8
9         for(Opportunity opp : lstopportunity){
10
11             if(opp.StageName == 'Closed Won' ){
12
13                 opportunityIds.add(opp.Id);
14
15             }
16
17         }
18
19         Map<Id,Opportunity_Automobile__c> lstopportunityAutomobile = new Map<Id,Opportunity_Automobile__c>();
20
21         set<Id> AutoInformationIds = new set<Id>();
22
23         for(Opportunity_Automobile__c OppAuto: lstopportunityAutomobile.values()){
24
25             if(OppAuto.Automobile__c != null){
26
27
```

A metadata browser window is open, showing the following table:

Entity Type	Entities	Related
Entity Type	Name	Namespace
Classes	OpportunityTrigger	
Triggers	OpportunityAutomobile__c	
Pages		
Page Components		
Objects		
Static Resources		
Packages		

The bottom of the screenshot shows a log table with columns: User, Application, Operation, Time, Status, Read, and Size.



```

1 public class OpportunityHandlerClass {
2
3
4
5 public static void opportunityAutomobileQuantity(List<Opportunity> lstOpportunity, Map<Id,Opportunity> oldMapOpportunity){
6
7     set<Id> opportunityIds = new set<Id>();
8
9     for(Opportunity opp : lstOpportunity){
10
11         if(opp.StageName == 'Closed Won' ){
12
13             opportunityIds.add(opp.Id);
14
15         }
16
17     }
18
19     Map<Id,Opportunity_Automobile__c> lstOpportunityAutomobile =new Map<Id,Opportunity_Automobile__c>([SELECT Id, Opportunity__c, Automobile__c, Quantity__c, Unit_Price__c, Total_Pr
20
21
22     set<Id> AutoInformationIds = new set<Id>();
23
24     for(Opportunity_Automobile__c OppAuto: lstOpportunityAutomobile.values()){
25
26         if(OppAuto.Automobile__c != null){
27
28             AutoInformationIds.add(OppAuto.Automobile__c);
29
30         }
31
32     }
33 }

```

```

1 public class OpportunityAutomobileHandlerClass {
2
3
4
5 public static void opportunityAutomobileQuantity(List<Opportunity> lstOpportunity, Map<Id,Opportunity> oldMapOpportunity){
6
7     set<Id> opportunityIds = new set<Id>();
8
9     for(Opportunity opp : lstOpportunity){
10
11         if(opp.StageName == 'Closed Won' ){
12
13             opportunityIds.add(opp.Id);
14
15         }
16
17     }
18
19     Map<Id,Opportunity_Automobile__c> lstOpportunityAutomobile =new Map<Id,Opportunity_Automobile__c>([SELECT Id, Opportunity__c, Automobile__c, Quantity__c, Unit_Price__c, Total_Pr
20
21
22     set<Id> AutoInformationIds = new set<Id>();
23
24     for(Opportunity_Automobile__c OppAuto: lstOpportunityAutomobile.values()){
25
26         if(OppAuto.Automobile__c != null){
27
28             AutoInformationIds.add(OppAuto.Automobile__c);
29
30         }
31
32     }
33 }

```

User Interface Testing: Test Lightning pages and mobile accessibility to ensure a seamless experience

5. Key Scenarios Addressed by Salesforce in the Implementation Project

Tracking potential customers from initial contact to vehicle purchase.

Automating follow-up reminders for scheduled services and renewal offers.

Reporting on sales conversion rates and customer satisfaction

6. Conclusion

Summary of Achievements: The Sales Automobile CRM Solution optimizes lead management, automates customer follow-ups, and provides actionable insights for the dealership, ultimately enhancing operational efficiency and customer satisfaction.