Sales Automobile Using Salesforce Crm

Project Overview :-

This Project is focused on developing a Sales Automobile using Salesforce Crm.This project will help manage leads, track customer interactions, improve sales forecasting and enhance the overall customer experience from lead generation to vehicle delivery. By leveraging salesforce's powerful suit of integrated tools, the dealership can automate key sales workflow, streamlined lead management and create a seamless customer journey from initial inquiry to post-sale service.

Objectives:-

Business Goals

➢ Leverage salesforce Crm's lead management and tracking features to ensure faster and more efficient follow-up on leads , improving the conversation rate from intial inquriry to closed sale.

➢ Personalize communication and offerings based on customer profiles, driving higher satisfaction and loyalty.

➢ Measure campaign effectiveness and track customer interactions to refine marketing efforts for higher engagement.

Specific Outcomes

➢ Execute marketing campaigns tailored to customer preferences and behavior.

➢ Enable all departments to access customer data, improving cross-department communication.

➢ Use lead scoring and automated follow-ups to convert more inquiries into test drives and purchases.

Salesforce key features and concepts Utilized

➢ **Real-Time Updates**: Receive notifications for new leads or customer activity instantly.

➢ **Sales Forecasting:** Use AI to forecast revenue and adjust inventory accordingly.

➢ **Lead Nurturing**: Send automated follow-ups and personalized content to keep potential buyers engaged.

➢ **Predictive Insights:** Analyze customer data to predict which vehicles are most likely to sell.

➤ **Prebuilt Apps:** Utilize third-party solutions for dealership management, vehicle financing, or insurance integration.

➤ **Workflows:** Trigger alerts or actions based on specific conditions, such as sending a follow-up email after a test drive.

Detailed steps to solution Design

1. **Business Requirements Analysis**
   Engage Stakeholders: Sales team, dealership managers, service team, marketing team, and IT administrators,

2. **Customer Journey Mapping**
   Stages: Awareness → Consideration → Test Drive → Purchase → After-Sales Support

3. **Define Solution Scope**
   Integration Needs: Dealer Management Systems (DMS), payment gateways, and marketing tools.

4. **High-Level Architecture Design**
   Customization: Custom objects for vehicle inventory, service history, and test drives.

5. **Data Model Design**
   Relationships: Vehicles linked to Opportunities and Accounts.

6. **Process Automation Design**
   Workflow Automations: Automatically assign leads to sales reps based on region.

7. **User Interface Customization**
   Custom Tabs and Pages: Vehicle inventory, test drive requests, and warranty tracking

8. **Testing and Validation:-**
   - Conduct Unit Testing for Apex classes and triggers.
   - To Perform User Interface Testing for LWCs and application workflows.

Testing and Validation

Testing Approach:-

- **Unit Testing:** To validating individual components and features to ensure they function correctly. And also, validate the functionality of apex classes and triggers.

- **UI Testing:** UI testing is a critical process that validates the user interface and ensures smooth and reliable interaction between the front-end elements (such as Lightning Experience, Visualforce Pages, and Lightning Web Components) and the back-end logic powered by Apex Classes and Triggers.

Key Scenarios Addressed by Salesforce in the implementation Project

➤ Automating lead collection from multiple channels and assigning them to the right sales representatives.

➤ Managing the customer journey through stages like inquiry, negotiation, and deal closure.
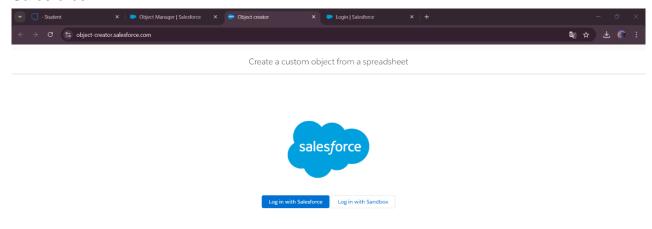
➤ Providing real-time tracking and updates of vehicle availability, pricing, and specifications.
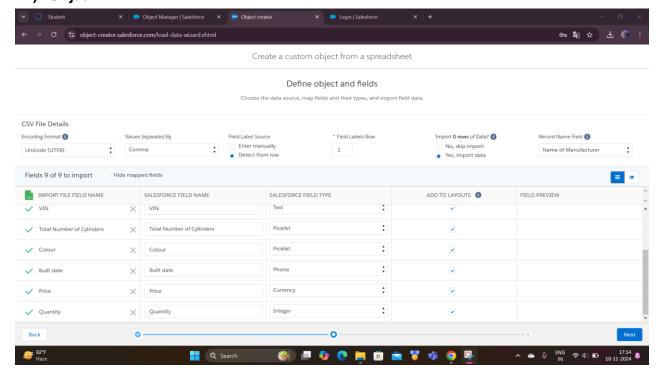➤ Capturing post-sale feedback to refine processes and enhance customer experience.
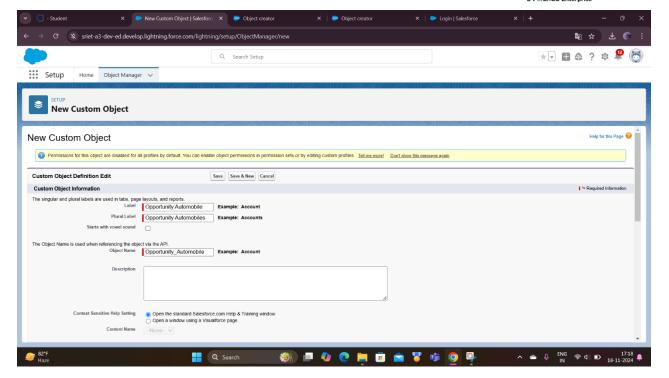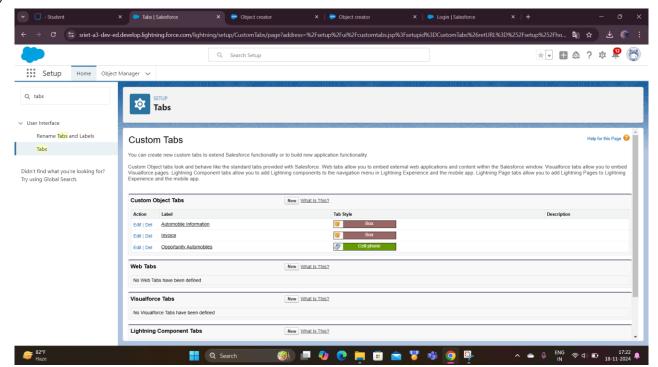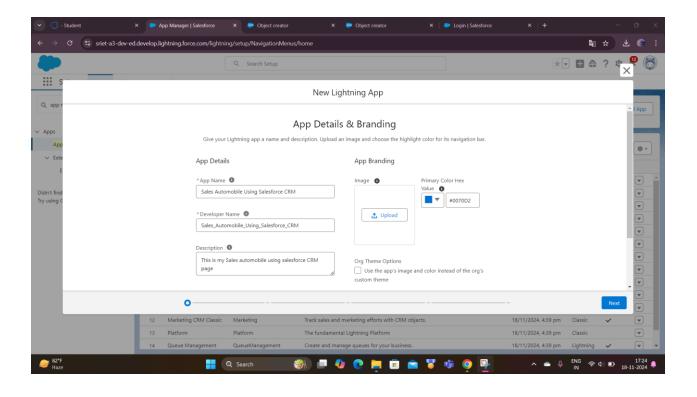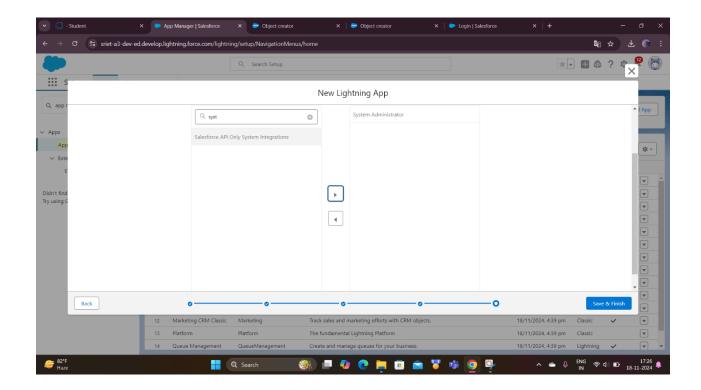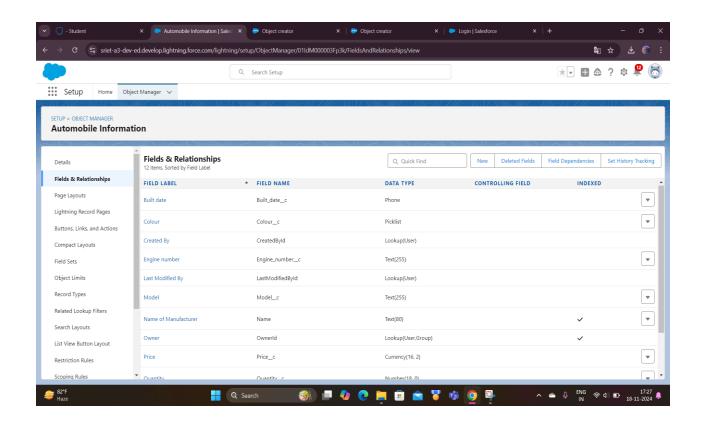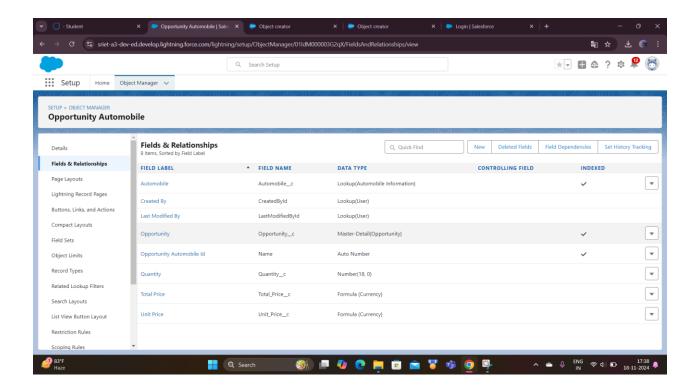
Project Tasks:-

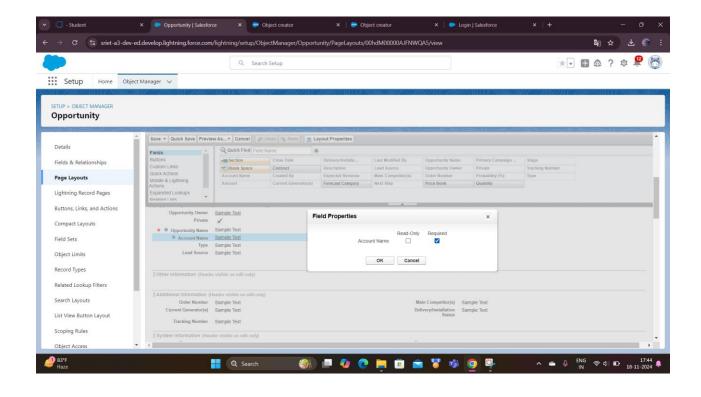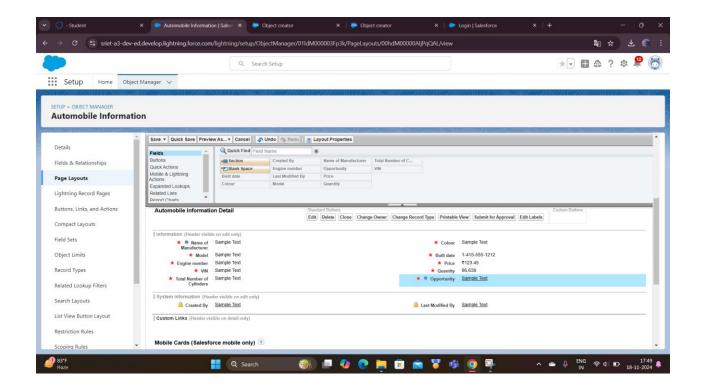## 1) Salesforce

2) Object

3) Tabs

4)Lightning app

5)Fields and relationship

6)Page Layout

8)Apex Trigger


```
trigger OpportunityTrigger on Opportunity (before update, After Update) {

    if(trigger.isbefore && trigger.isUpdate){

            OpportunityHandlerClass.opportunityAutomobileQuantity(trigger.new, trigger.oldMap);

    }

    IF(trigger.isafter && trigger.isupdate){

        InvoiceCreation.OpportunityClosedwonInvoiceGeneration(trigger.new, trigger.oldMap);

    }

}
```
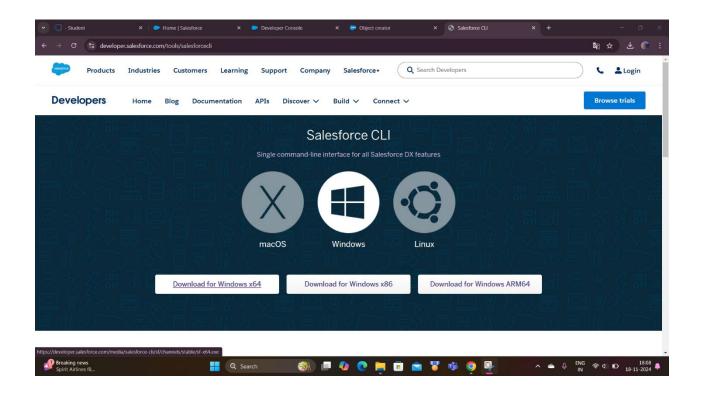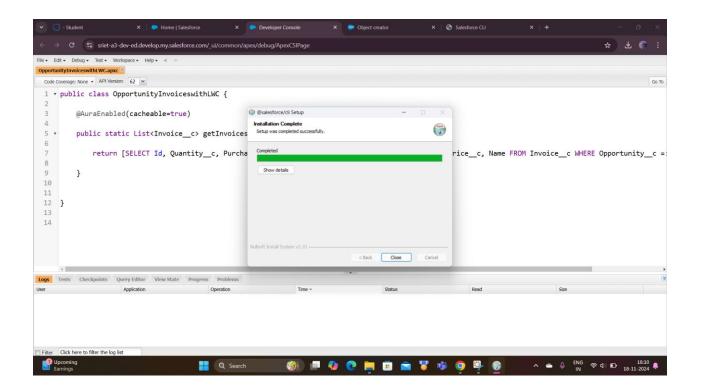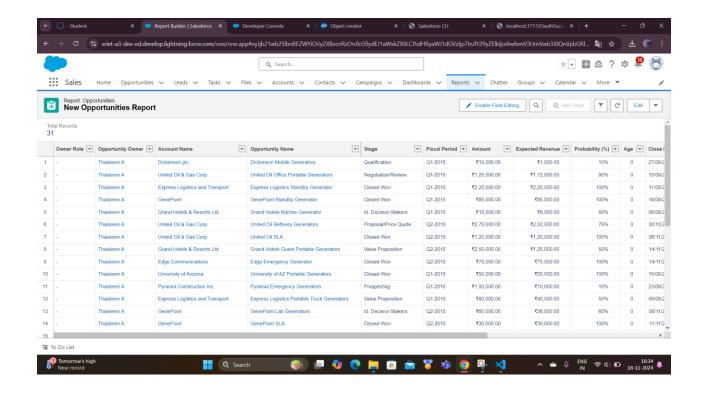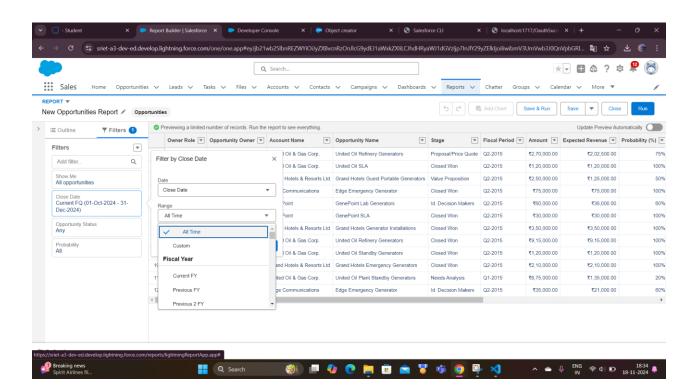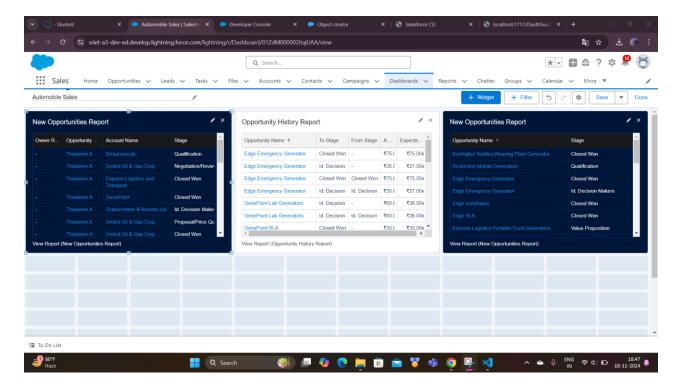
9) LWC Component

10) Apex Schedulers

11) Report

Conclusion :-

Summary of Achievements

This project aims to transform the automobile dealership's sales process by leveraging salesforce crm to improve the followings
- ✓ Lead management
- ✓ Sales tracking
- ✓ Customer relationships
- ✓ Marketing Efforts