

# 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 inquiry 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.

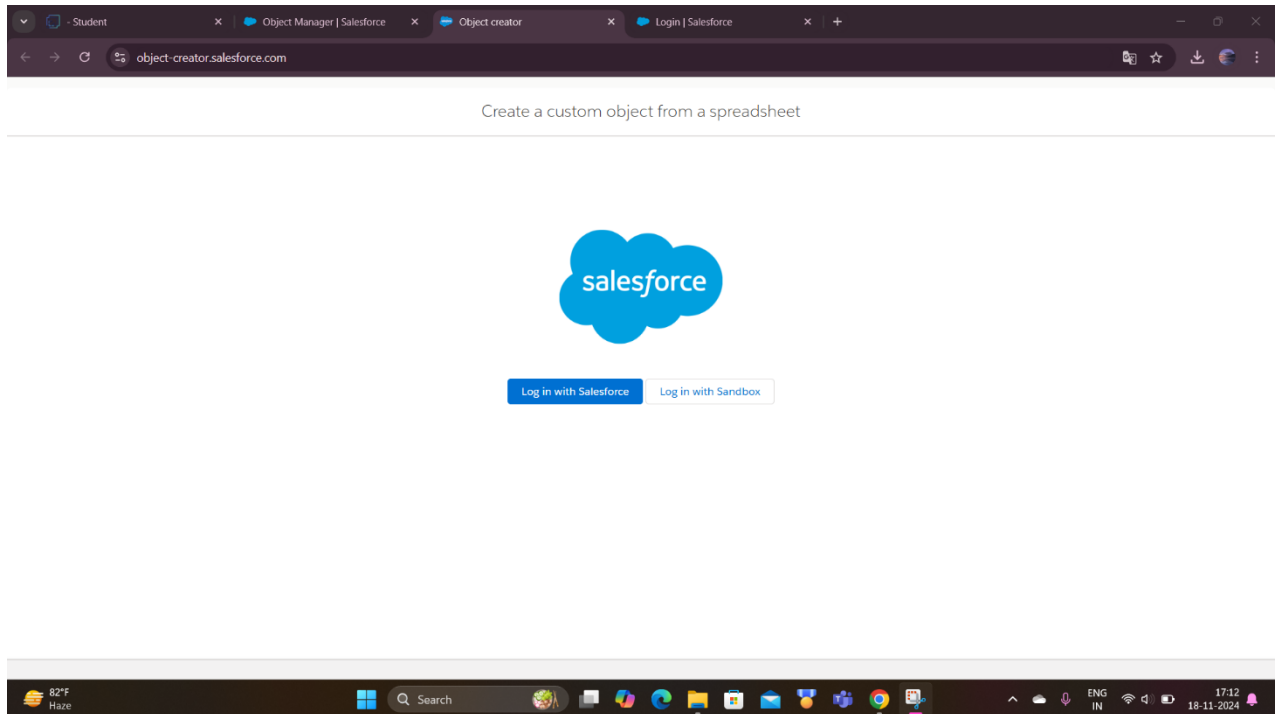
## Key Scenarios Addressed by Salesforce in the implementation Project

- 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.

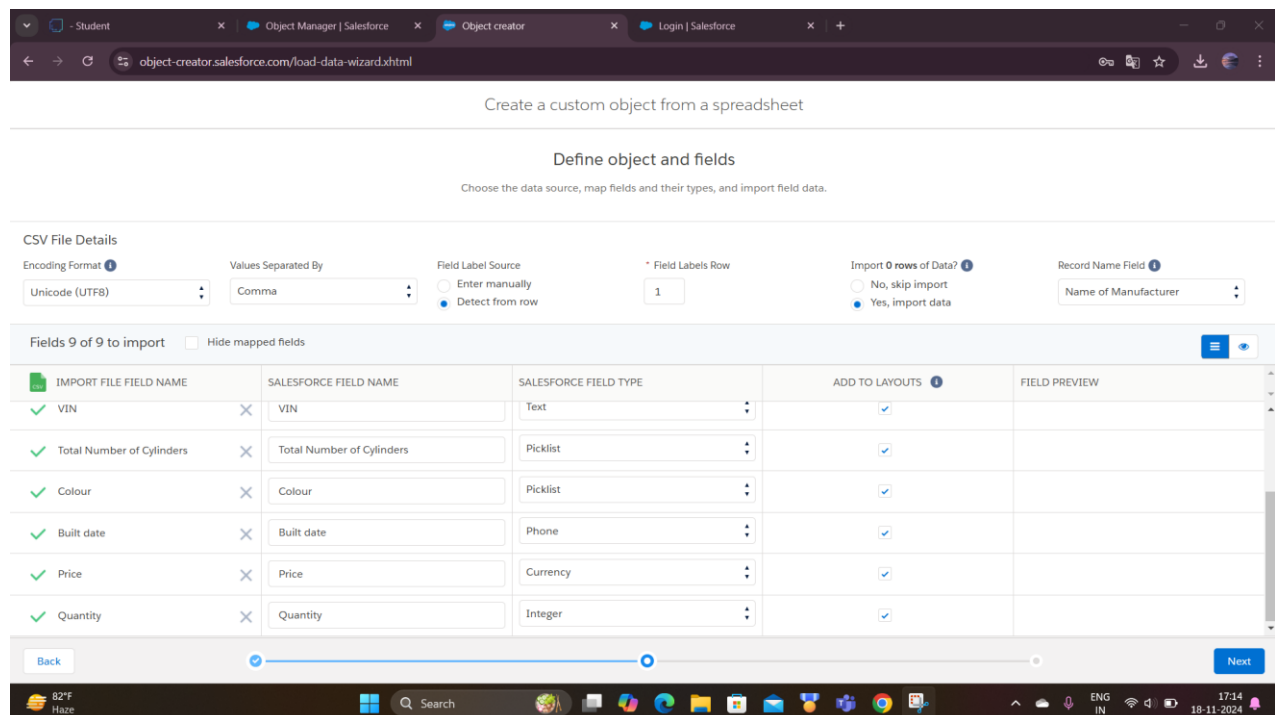
- Providing real-time tracking and updates of vehicle availability, pricing, and specifications.
- Capturing post-sale feedback to refine processes and enhance customer experience.

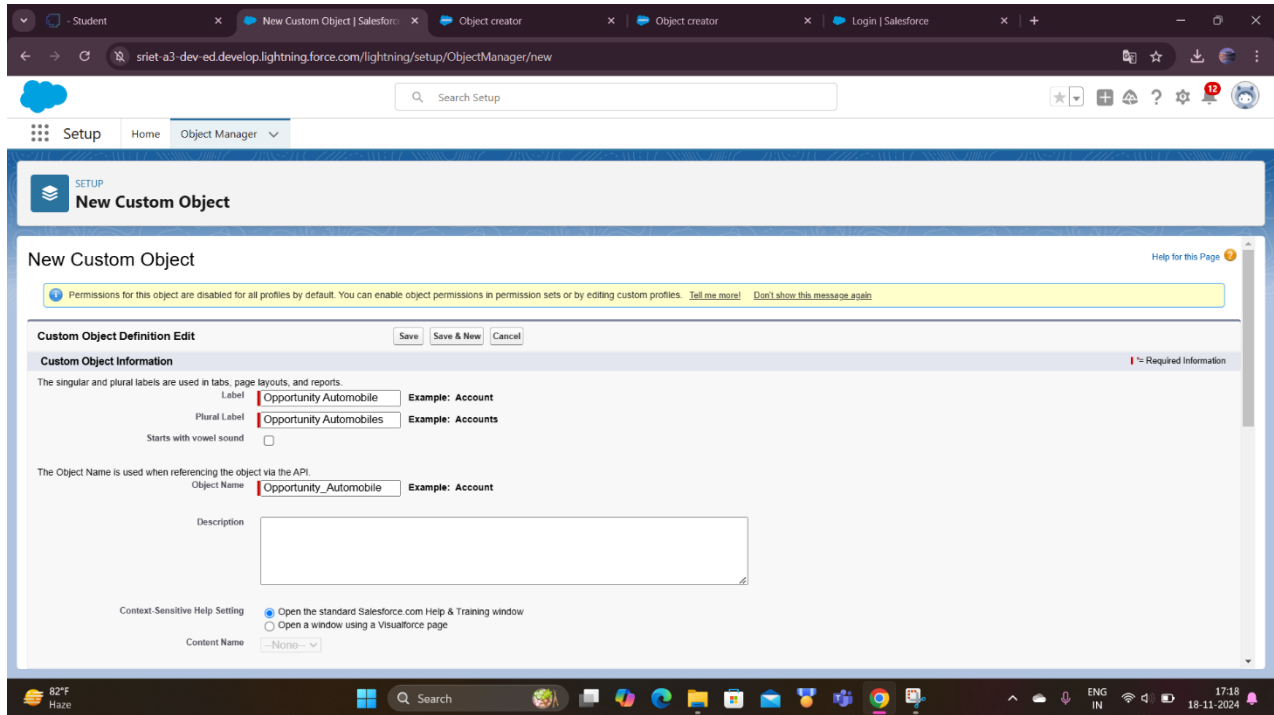
## Project Tasks:-

### 1) Salesforce



### 2) Object





Setup | Home | Object Manager

## New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more!](#) [Don't show this message again](#)

**Custom Object Definition Edit** [Save] [Save & New] [Cancel]

**Custom Object Information** \* Required 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.

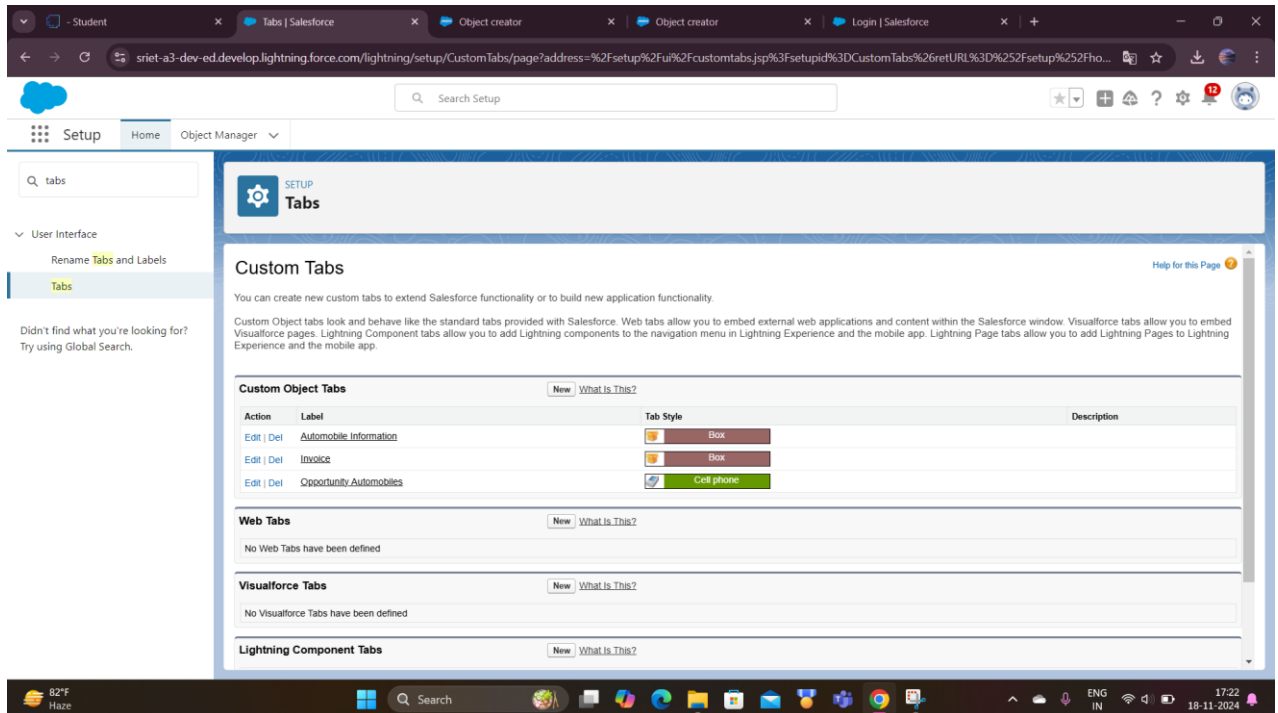
Object Name:  Example: Account

Description:

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

Content Name:

### 3) Tabs



Setup | Home | Object Manager

Search Setup

Search: tabs

User Interface

Rename Tabs and Labels

**Tabs**

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

## Custom Tabs

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

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

**Custom Object Tabs** [New] [What Is This?]

Action	Label	Tab Style	Description
<a href="#">Edit</a>   <a href="#">Del</a>	Automobile Information	Box	
<a href="#">Edit</a>   <a href="#">Del</a>	Invoice	Box	
<a href="#">Edit</a>   <a href="#">Del</a>	Opportunity Automobiles	Cell phone	

**Web Tabs** [New] [What Is This?]

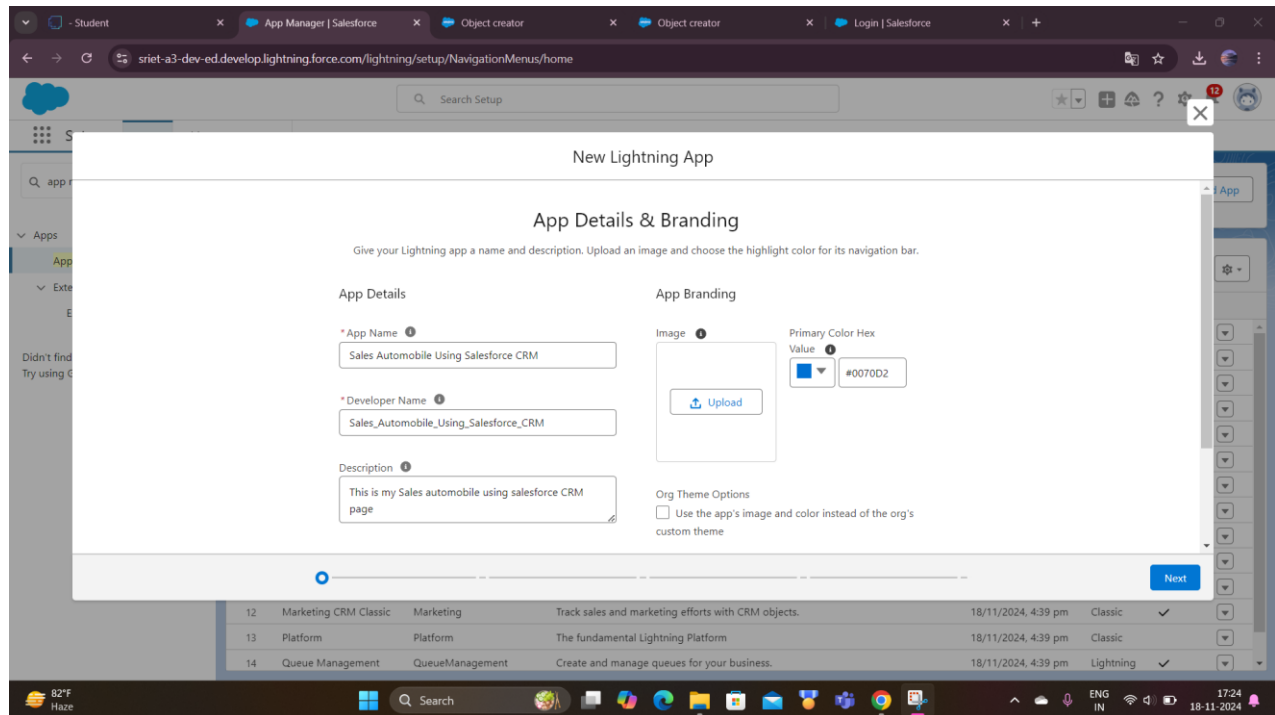
No Web Tabs have been defined

**Visualforce Tabs** [New] [What Is This?]

No Visualforce Tabs have been defined

**Lightning Component Tabs** [New] [What Is This?]

## 4) Lightning app



**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 <sup>?</sup>

Sales Automobile Using Salesforce CRM

\* Developer Name <sup>?</sup>

Sales\_Automobile\_Using\_Salesforce\_CRM

Description <sup>?</sup>

This is my Sales automobile using salesforce CRM page

**App Branding**

Image <sup>?</sup>

Primary Color Hex Value <sup>?</sup>

#0070D2

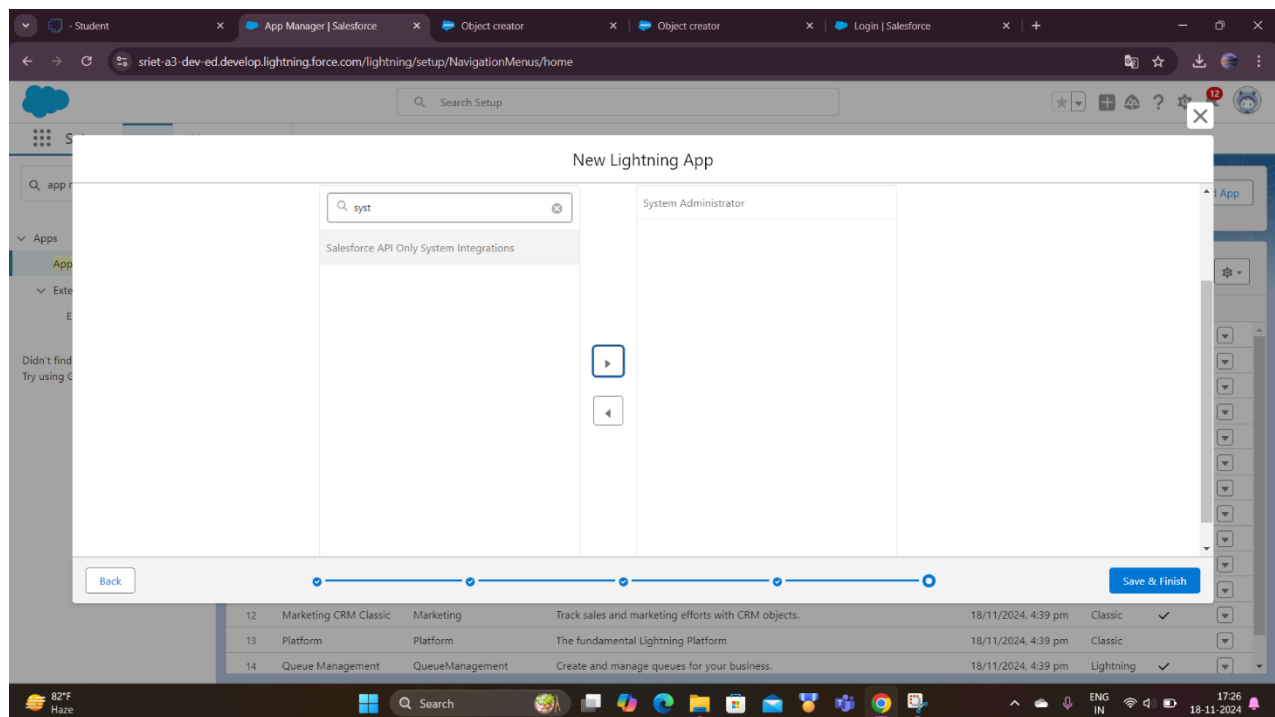
Upload

Org Theme Options

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

Next

12	Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	18/11/2024, 4:39 pm	Classic	✓
13	Platform	Platform	The fundamental Lightning Platform	18/11/2024, 4:39 pm	Classic	
14	Queue Management	QueueManagement	Create and manage queues for your business.	18/11/2024, 4:39 pm	Lightning	✓



**New Lightning App**

Search Setup

Search

System Administrator

Salesforce API Only System Integrations

Back

Save & Finish

12	Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	18/11/2024, 4:39 pm	Classic	✓
13	Platform	Platform	The fundamental Lightning Platform	18/11/2024, 4:39 pm	Classic	
14	Queue Management	QueueManagement	Create and manage queues for your business.	18/11/2024, 4:39 pm	Lightning	✓

## 5) Fields and relationship

Setup > OBJECT MANAGER

### Automobile Information

Details

**Fields & Relationships**  
12 Items, Sorted by Field Label

Quick Find:

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Built date	Built_date__c	Phone		
Colour	Colour__c	Picklist		
Created By	CreatedById	Lookup(User)		
Engine number	Engine_number__c	Text(255)		
Last Modified By	LastModifiedById	Lookup(User)		
Model	Model__c	Text(255)		
Name of Manufacturer	Name	Text(80)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Price	Price__c	Currency(16, 2)		
Quantity	Quantity__c	Number(18, 0)		

Setup > OBJECT MANAGER

### Opportunity Automobile

Details

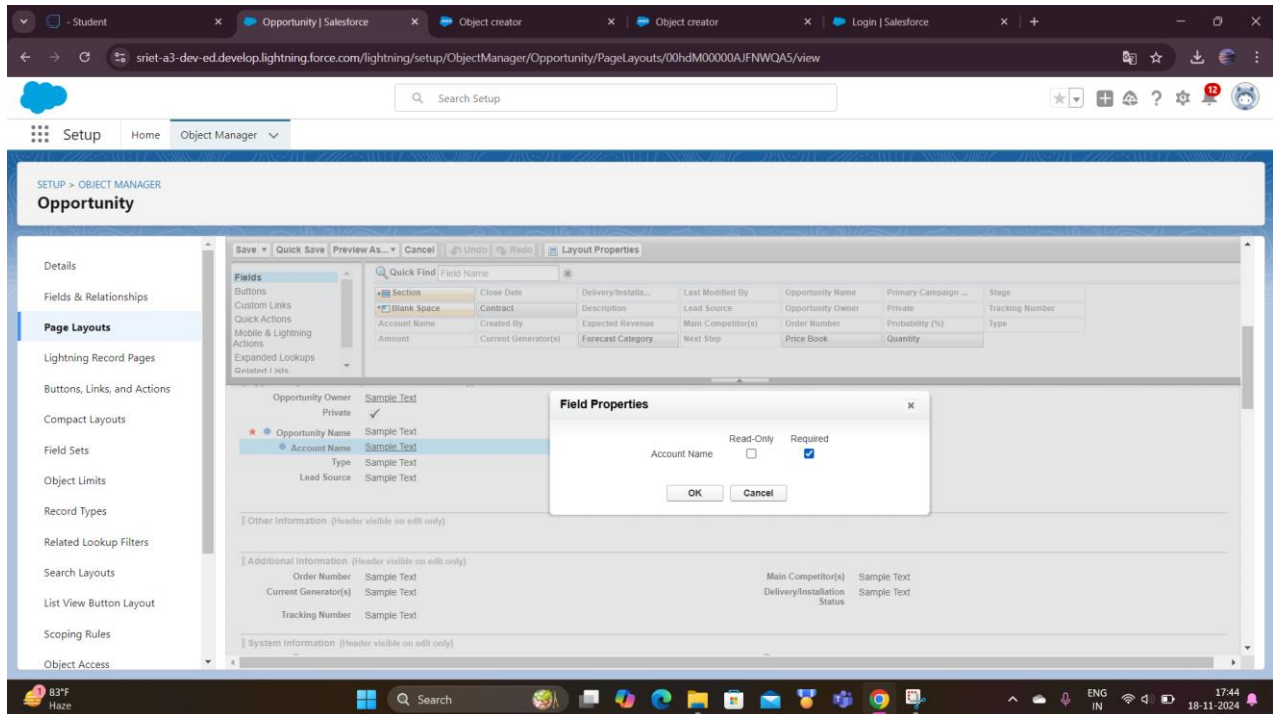
**Fields & Relationships**  
8 Items, Sorted by Field Label

Quick Find:

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Automobile	Automobile__c	Lookup(Automobile Information)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Opportunity	Opportunity__c	Master-Detail(Opportunity)		✓
Opportunity Automobile Id	Name	Auto Number		✓
Quantity	Quantity__c	Number(18, 0)		
Total Price	Total_Price__c	Formula (Currency)		
Unit Price	Unit_Price__c	Formula (Currency)		

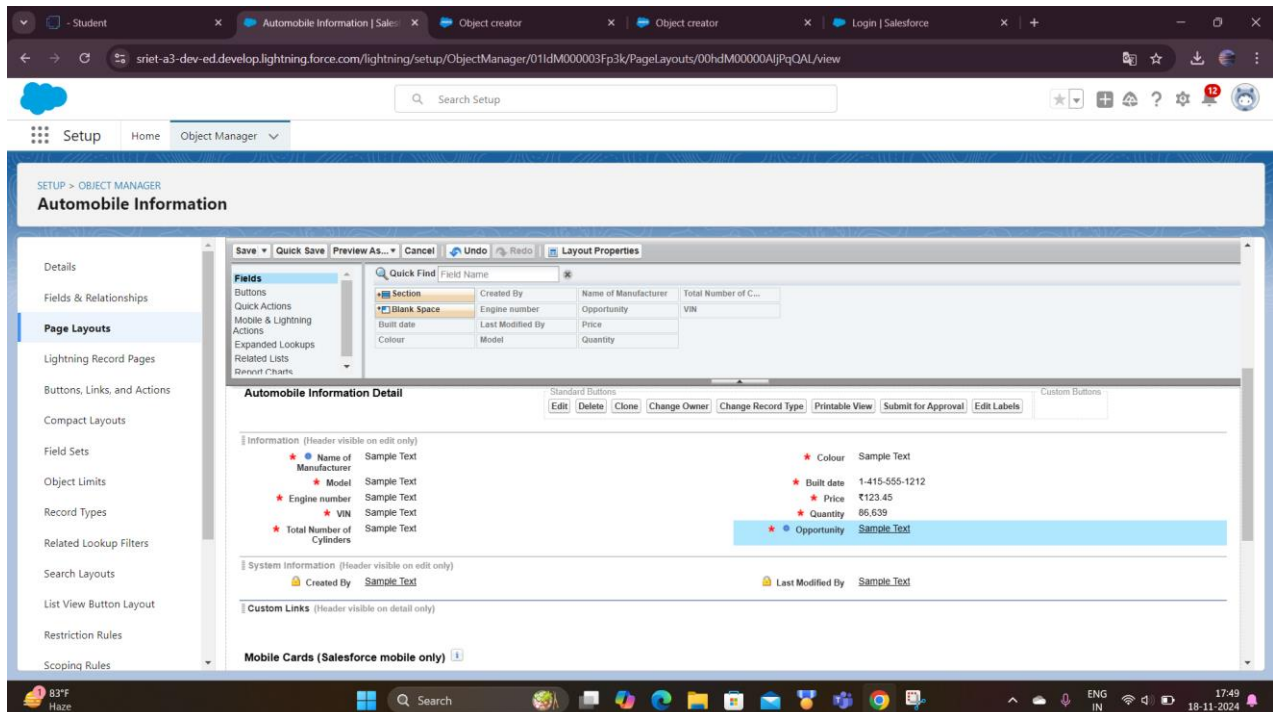
## 6)Page Layout



The screenshot shows the Salesforce Setup interface for configuring the 'Opportunity' object layout. The 'Page Layouts' section is selected in the left sidebar. The 'Layout Properties' window is open, displaying a list of fields and their properties. A 'Field Properties' dialog box is open for the 'Account Name' field, showing the following settings:

Field Name	Read-Only	Required
Account Name	<input type="checkbox"/>	<input checked="" type="checkbox"/>

The dialog box also includes 'OK' and 'Cancel' buttons.



The screenshot shows the Salesforce Setup interface for configuring the 'Automobile Information' object layout. The 'Page Layouts' section is selected in the left sidebar. The 'Layout Properties' window is open, displaying a list of fields and their properties. The 'Automobile Information Detail' section is visible, showing the following fields:

Field Name	Value
Name of Manufacturer	Sample Text
Model	Sample Text
Engine number	Sample Text
VIN	Sample Text
Total Number of Cylinders	Sample Text

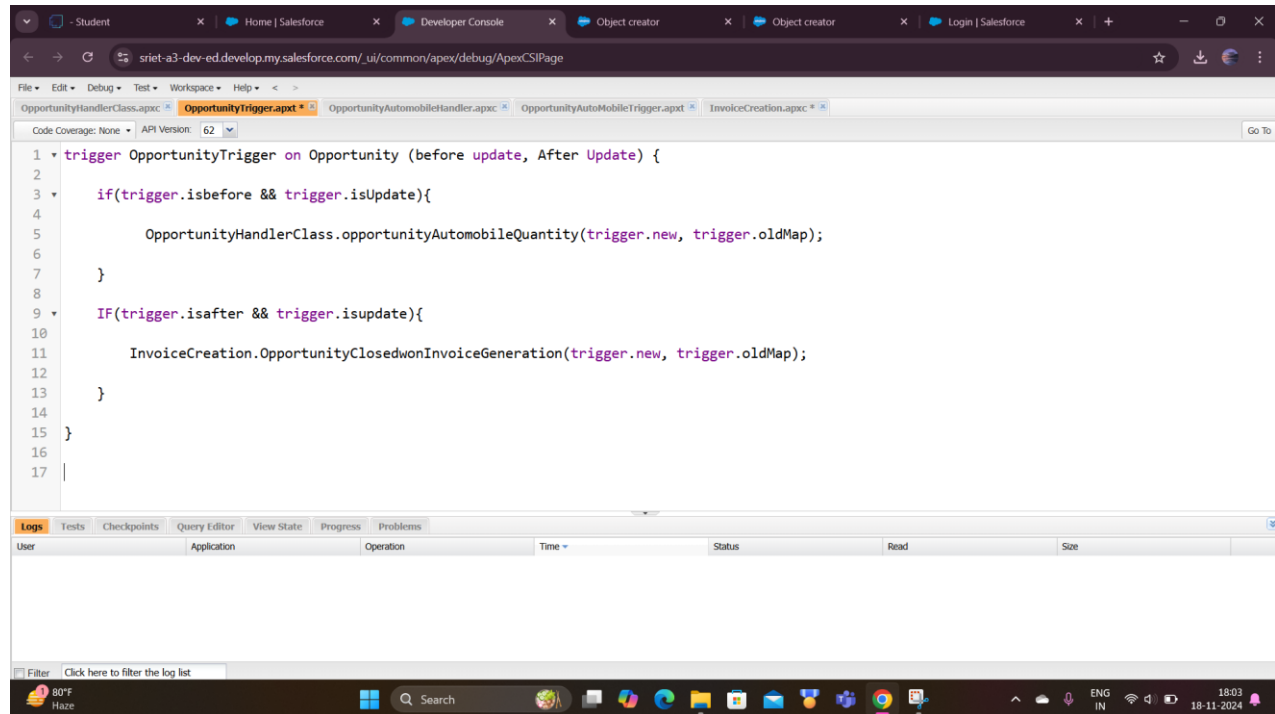
The 'Automobile Information Detail' section also includes a 'System Information' section with the following fields:

Field Name	Value
Created By	Sample Text
Last Modified By	Sample Text

The 'Automobile Information Detail' section also includes a 'Custom Links' section with the following links:

Link Name	Label
Standard Buttons	Edit, Delete, Clone, Change Owner, Change Record Type, Printable View, Submit for Approval, Edit Labels
Custom Buttons	

## 8) Apex Trigger



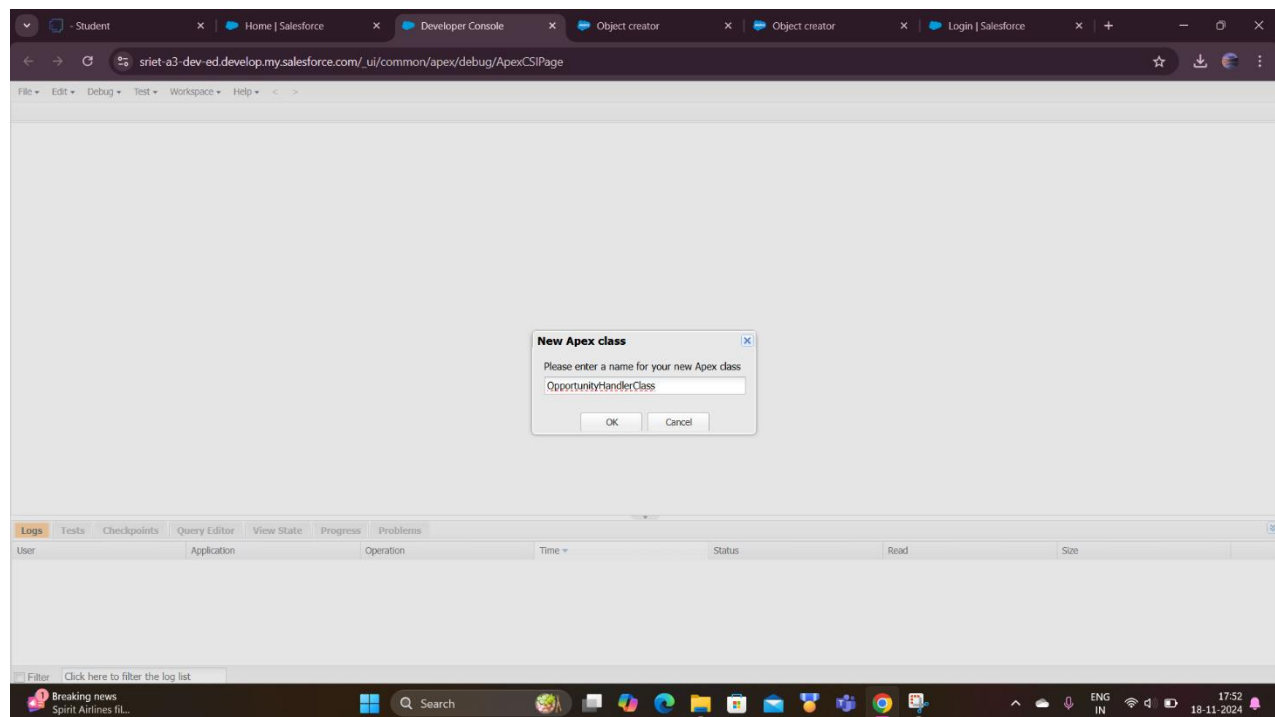
The screenshot shows the Salesforce Developer Console with the Apex Trigger editor open. The trigger is named 'OpportunityTrigger' and is set to fire on the 'Opportunity' object, triggered by 'before update, After Update' events. The trigger code is as follows:

```

1 trigger OpportunityTrigger on Opportunity (before update, After Update) {
2
3     if(trigger.isbefore && trigger.isUpdate){
4
5         OpportunityHandlerClass.opportunityAutomobileQuantity(trigger.new, trigger.oldMap);
6
7     }
8
9     IF(trigger.isafter && trigger.isupdate){
10
11         InvoiceCreation.OpportunityClosedwonInvoiceGeneration(trigger.new, trigger.oldMap);
12
13     }
14
15 }
16
17

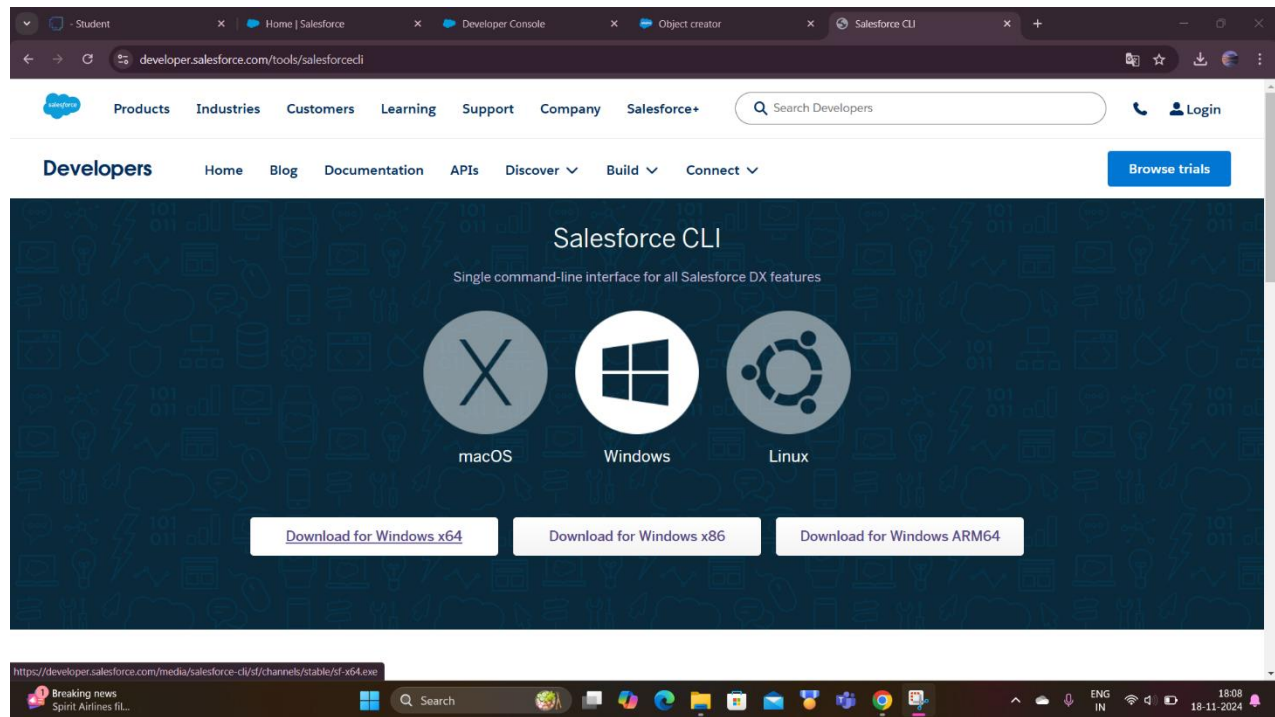
```

The console also shows a 'Logs' tab at the bottom, which is currently empty. The system status bar at the bottom indicates a temperature of 80°F and a date of 18-11-2024.

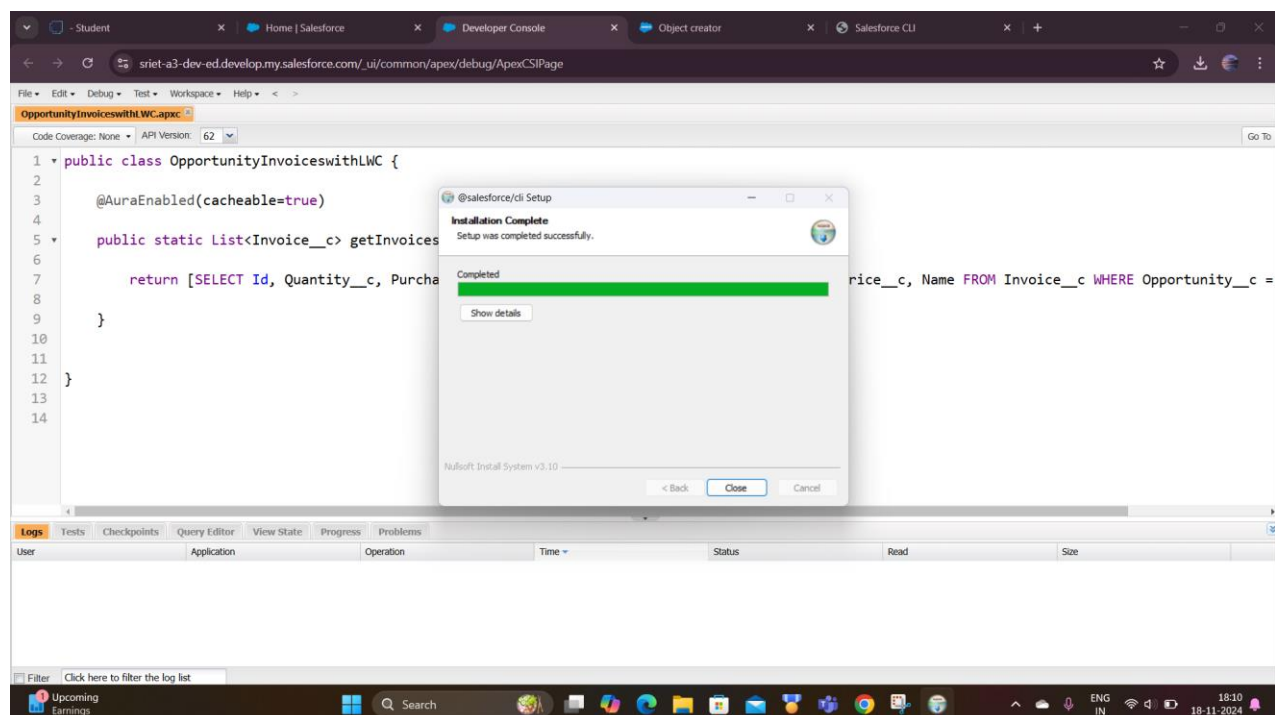




## 9) LWC Component



## 10) Apex Schedulers



## 11) Report

Report Builder | Salesforce

Report: Opportunities  
New Opportunities Report

Total Records: 31

	Owner Role	Opportunity Owner	Account Name	Opportunity Name	Stage	Fiscal Period	Amount	Expected Revenue	Probability (%)	Age	Close Date
1	-	Thasleem A	Dickenson plc	Dickenson Mobile Generators	Qualification	Q1-2015	₹15,000.00	₹1,500.00	10%	0	27/09/2
2	-	Thasleem A	United Oil & Gas Corp.	United Oil Office Portable Generators	Negotiation/Review	Q1-2015	₹1,25,000.00	₹1,12,500.00	90%	0	15/09/2
3	-	Thasleem A	Express Logistics and Transport	Express Logistics Standby Generator	Closed Won	Q1-2015	₹2,20,000.00	₹2,20,000.00	100%	0	11/08/2
4	-	Thasleem A	GenePoint	GenePoint Standby Generator	Closed Won	Q1-2015	₹85,000.00	₹85,000.00	100%	0	18/09/2
5	-	Thasleem A	Grand Hotels & Resorts Ltd	Grand Hotels Kitchen Generator	Id. Decision Makers	Q1-2015	₹15,000.00	₹9,000.00	60%	0	06/08/2
6	-	Thasleem A	United Oil & Gas Corp.	United Oil Refinery Generators	Proposal/Price Quote	Q2-2015	₹2,70,000.00	₹2,02,500.00	75%	0	30/10/2
7	-	Thasleem A	United Oil & Gas Corp.	United Oil SLA	Closed Won	Q2-2015	₹1,20,000.00	₹1,20,000.00	100%	0	06/11/2
8	-	Thasleem A	Grand Hotels & Resorts Ltd	Grand Hotels Guest Portable Generators	Value Proposition	Q2-2015	₹2,50,000.00	₹1,25,000.00	50%	0	14/11/2
9	-	Thasleem A	Edge Communications	Edge Emergency Generator	Closed Won	Q2-2015	₹75,000.00	₹75,000.00	100%	0	14/11/2
10	-	Thasleem A	University of Arizona	University of AZ Portable Generators	Closed Won	Q1-2015	₹50,000.00	₹50,000.00	100%	0	15/08/2
11	-	Thasleem A	Pyramid Construction Inc.	Pyramid Emergency Generators	Prospecting	Q1-2015	₹1,00,000.00	₹1,00,000.00	10%	0	23/09/2
12	-	Thasleem A	Express Logistics and Transport	Express Logistics Portable Truck Generators	Value Proposition	Q1-2015	₹80,000.00	₹40,000.00	50%	0	09/08/2
13	-	Thasleem A	GenePoint	GenePoint Lab Generators	Id. Decision Makers	Q2-2015	₹60,000.00	₹36,000.00	60%	0	08/11/2
14	-	Thasleem A	GenePoint	GenePoint SLA	Closed Won	Q2-2015	₹30,000.00	₹30,000.00	100%	0	11/11/2

Report Builder | Salesforce

REPORT  
New Opportunities Report Opportunities

Previewing a limited number of records. Run the report to see everything.

Update Preview Automatically

Filters: 1

Filter by Close Date

Date: Close Date

Range: All Time

Custom

Fiscal Year

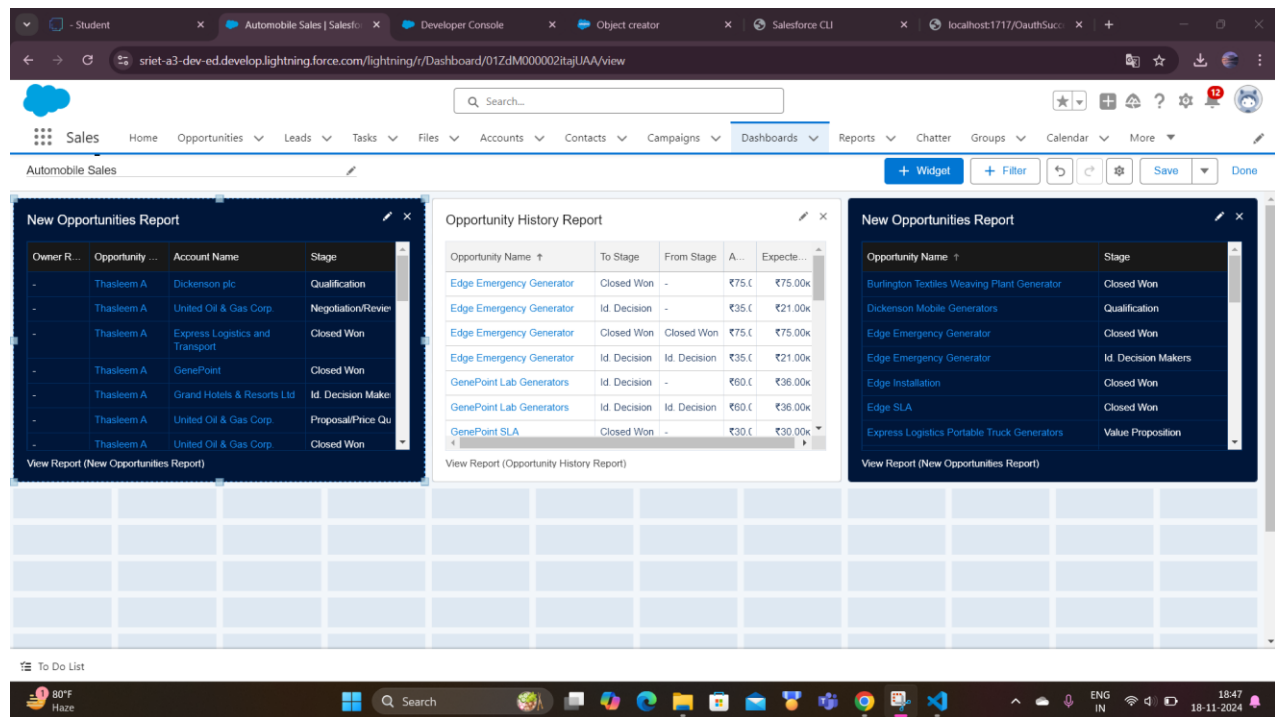
Current FY

Previous FY

Previous 2 FY

	Owner Role	Opportunity Owner	Account Name	Opportunity Name	Stage	Fiscal Period	Amount	Expected Revenue	Probability (%)
1	-	Thasleem A	United Oil & Gas Corp.	United Oil Refinery Generators	Proposal/Price Quote	Q2-2015	₹2,70,000.00	₹2,02,500.00	75%
2	-	Thasleem A	United Oil & Gas Corp.	United Oil SLA	Closed Won	Q2-2015	₹1,20,000.00	₹1,20,000.00	100%
3	-	Thasleem A	Grand Hotels & Resorts Ltd	Grand Hotels Guest Portable Generators	Value Proposition	Q2-2015	₹2,50,000.00	₹1,25,000.00	50%
4	-	Thasleem A	Communications	Edge Emergency Generator	Closed Won	Q2-2015	₹75,000.00	₹75,000.00	100%
5	-	Thasleem A	Point	GenePoint Lab Generators	Id. Decision Makers	Q2-2015	₹60,000.00	₹36,000.00	60%
6	-	Thasleem A	Point	GenePoint SLA	Closed Won	Q2-2015	₹30,000.00	₹30,000.00	100%
7	-	Thasleem A	Hotels & Resorts Ltd	Grand Hotels Generator Installations	Closed Won	Q2-2015	₹3,50,000.00	₹3,50,000.00	100%
8	-	Thasleem A	Oil & Gas Corp.	United Oil Refinery Generators	Closed Won	Q2-2015	₹9,15,000.00	₹9,15,000.00	100%
9	-	Thasleem A	Oil & Gas Corp.	United Oil Standby Generators	Closed Won	Q2-2015	₹1,20,000.00	₹1,20,000.00	100%
10	-	Thasleem A	Grand Hotels & Resorts Ltd	Grand Hotels Emergency Generators	Closed Won	Q2-2015	₹2,10,000.00	₹2,10,000.00	100%
11	-	Thasleem A	United Oil & Gas Corp.	United Oil Plant Standby Generators	Needs Analysis	Q1-2015	₹6,75,000.00	₹1,35,000.00	20%
12	-	Thasleem A	Edge Communications	Edge Emergency Generator	Id. Decision Makers	Q2-2015	₹35,000.00	₹21,000.00	60%

## 12) Dashboard



The screenshot shows a Salesforce dashboard for 'Automobile Sales'. The dashboard is viewed on a desktop browser with multiple tabs open. The dashboard displays three reports:

- New Opportunities Report:** A table with columns: Owner R..., Opportunity ..., Account Name, and Stage. It lists several opportunities, including 'Thasleem A. Dickinson plc' (Qualification), 'Thasleem A. United Oil & Gas Corp.' (Negotiation/Review), 'Thasleem A. Express Logistics and Transport' (Closed Won), 'Thasleem A. GenePoint' (Closed Won), 'Thasleem A. Grand Hotels & Resorts Ltd' (Id. Decision Make), 'Thasleem A. United Oil & Gas Corp.' (Proposal/Price Qu), and 'Thasleem A. United Oil & Gas Corp.' (Closed Won).
- Opportunity History Report:** A table with columns: Opportunity Name, To Stage, From Stage, A..., and Expecte... It shows the history of opportunities, including 'Edge Emergency Generator' (Closed Won), 'Edge Emergency Generator' (Id. Decision), 'Edge Emergency Generator' (Closed Won), 'Edge Emergency Generator' (Id. Decision), 'GenePoint Lab Generators' (Id. Decision), 'GenePoint Lab Generators' (Id. Decision), and 'GenePoint SLA' (Closed Won).
- New Opportunities Report:** A table with columns: Opportunity Name and Stage. It lists several opportunities, including 'Burlington Textiles Weaving Plant Generator' (Closed Won), 'Dickenson Mobile Generators' (Qualification), 'Edge Emergency Generator' (Closed Won), 'Edge Emergency Generator' (Id. Decision Makers), 'Edge Installation' (Closed Won), 'Edge SLA' (Closed Won), and 'Express Logistics Portable Truck Generators' (Value Proposition).

## 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