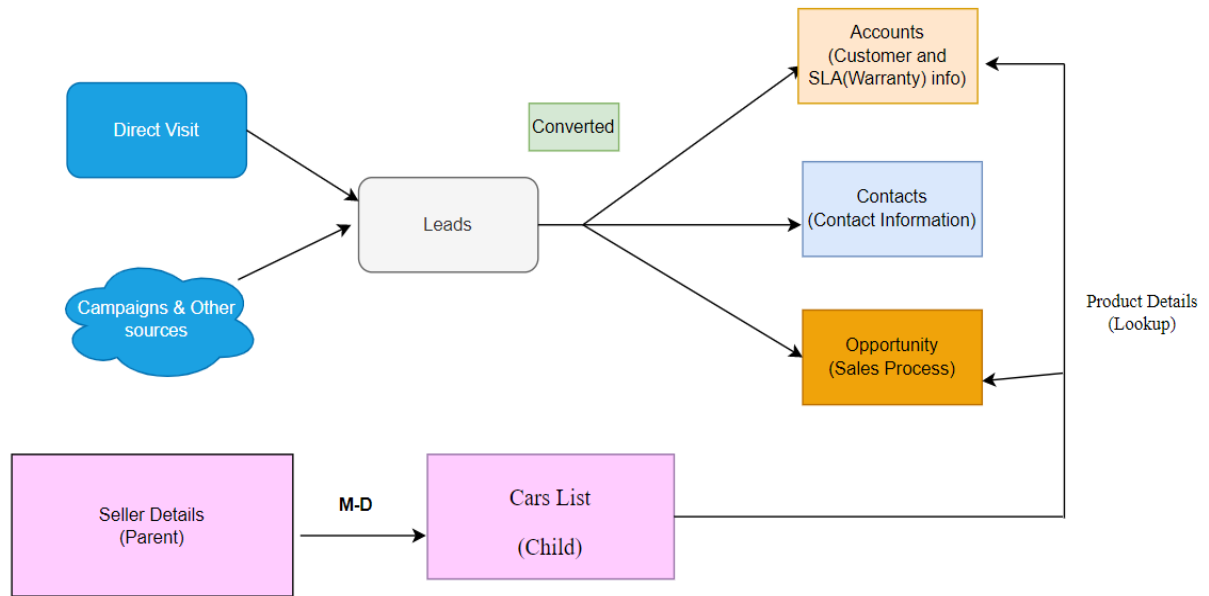


TESLA CAR SHOWROOM

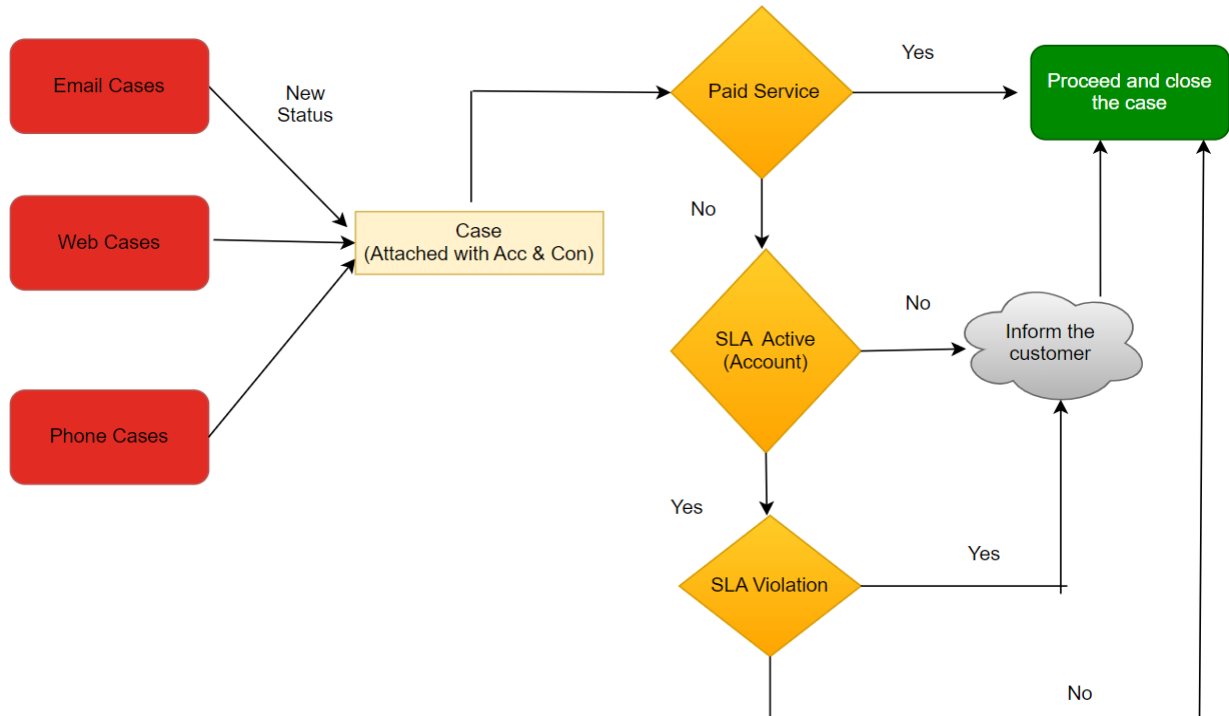
Case Study about Business:

- The Tesla Showroom deals with second-hand cars. Showroom sales & service.
- The Cars are bought from individuals and as well as from Dealers.
- The Dealers are the Banks or NBFC who recover the vehicle from the people who haven't repayed their loan. Since their collateral is the vehicle.
- The details of the vehicles and their source need to be tracked. The details of the person who sells the vehicle should also be stored in the org.
- The Process of Lead generating includes campaigns, web pages, Social Media Marketing and there will be direct leads who come and visit the showroom.
- The Leads should be contacted and be converted. If the Lead is converted the details of the lead should be moved to the next process of sales. If not converted, then it should be stayed in the lead itself.
- In the next process, the details of the customer should be stored, their contact information and how the sales process pipeline is defined.
- If the deal is closed the customer's SLA details should be updated. If not closed, the customer details should be kept up in the database with the reason for loss.
- After Purchasing the Product if the Customer has any issues or Problem. They might visit the showroom with the vehicle, or They might raise a Service or Repair Request. The Request might be from website or Mail, so the requests should be assigned properly to the service engineers. So that once they receive the request from the Service engineers might go to the customer place and pick the vehicle.
- The cases should be assigned properly. Then the details of the problem or issue should be tracked and once it is completed, the customer should be notified.

SALES PROCESS:



SUPPORT PROCESS:



DATA MODEL:

- Seller Details Object is used to Track the details of the Clients who are going sell the Car. They are of Two types of Individual & Dealer.
- Car List object is used to have the Information of the product(car) they are going to sell.
- As Usual the standard objects Lead, Account, Contact & Opportunity are used for their standard purposes.

The image displays six mobile application screens, each representing a different data object in the system. Each screen has a title bar with a gear icon for settings. The fields are organized into sections, some with red vertical bars indicating required or highlighted fields.

- Seller_Details_c**: Fields include Client_Address_c (Address), Client_Email_c (Email), Client_Phone_c (Phone), Count_of_Cars_c (Roll-Up Summary (COUNT Car List)), CreatedBy (Lookup/User), Dealer_Address_c (Address), Dealer_Gst_Number_c (Text(20)), Dealer_Name_c (Text(160)), Dealer_Office_no_c (Phone), Dealer_PAN_c (Text(16)), Dealer_Phone_c (Phone), LastModifiedBy (Lookup/User), Name (Text(50)), Owner (Lookup/User+?), and RecordType (Record Type).
- Car_List_c**: Fields include CreatedBy (Lookup/User), Fuel_Type_c (Picklist), Insurance_Available_c (Checkbox), Insurance_Expiry_Date_c (Date), Kms_Driven_c (Number(15, 0)), LastModifiedBy (Lookup/User), Name (Text(50)), Owner_Count_c (Number(2, 0)), RC_Verified_c (Checkbox), Seat_Capacity_c (Number(2, 0)), Seller_c (Master-Detail (Seller Details)), Selling_Price_c (Currency(15, 0)), Showroom_Price_c (Currency(15, 0)), Tank_Capacity_c (Number(2, 0)), Transmission_Gear_c (Picklist), and Year_of_Manufacture_c (Number(5, 0)).
- Lead**: Fields include Address (Address), AnnualRevenue (Currency(15, 0)), Campaign (Lookup/Campaign), Campaign_Name_c (Lookup), CleanStatus (Picklist), Company (Text(256)), CompanyDunsNumber (Text(20)), CreatedBy (Lookup/User), CurrentGenerators_c (Text(10)), DandsCompanyLookup (D88), Description (Long Text Area (320)), DoNotCall (Checkbox), Email (Email), Fax (Fax), GenderIdentity (Picklist), HasOptedOutOfEmail (Checkbox), HasOptedOutOfFax (Checkbox), Individual (Lookup/Individual), Industry (Picklist), Jigsaw (Text(20)), LastModifiedBy (Lookup/User), LastTransferDate (Date), and LastTransferBy (Picklist).
- Account**: Fields include AccountNumber (Text(40)), AccountSource (Picklist), Active_c (Picklist), AnnualRevenue (Currency(15, 0)), BillingAddress (Address), CleanStatus (Picklist), Company_c (Text(56)), Conversion_test_c (Roll-Up Summary (COUNT Opportunity)), CreatedBy (Lookup/User), CustomerPriority_c (Picklist), DandsCompanyLookup (D88 Company), Date_of_Delivery_c (Date/Time), Description (Long Text Area (32000)), DunsNumber (Text(2)), Fax (Fax), Industry (Picklist), Jigsaw (Text(20)), LastModifiedBy (Lookup/User), Name (Text(5)), NameDesc (Text(120)), Name (Text), and NumberOfEmployees (Number(5, 0)).
- Contact**: Fields include Account (Lookup/Account), AssistantName (Text(40)), AssistantPhone (Phone), Birthdate (Date), CleanStatus (Picklist), CreatedBy (Lookup/User), Department (Text(50)), Description (Long Text Area (32000)), DoNotCall (Checkbox), Email (Email), Fax (Fax), GenderIdentity (Picklist), HasOptedOutOfEmail (Checkbox), HasOptedOutOfFax (Checkbox), HomePhone (Phone), Individual (Lookup/Individual), Jigsaw (Text(20)), LastCURequestDate (Date/Time), LastCUUpdateDate (Date/Time), LastModifiedBy (Lookup/User), LeadSource (Picklist), Level_c (Picklist), and HomeAddress (Address).
- Opportunity**: Fields include Account (Lookup/Account), Amount (Currency(15, 0)), Campaign (Lookup/Campaign), CloseDate (Date), Contract (Lookup/Contract), CreatedBy (Lookup/User), CurrentGenerators_c (Text(100)), DeliveryInstallationStatus_c (Picklist), Description (Long Text Area (32000)), Discount_c (Formula (Percent)), ExpectedRevenue (Currency(15, 0)), ForecastCategoryName (Picklist), IsBids (Number(2, 0)), IsPrivate (Checkbox), LastModifiedBy (Lookup/User), LeadSource (Picklist), MainCompetitors_c (Text(100)), Name (Text(120)), NextStep (Text(256)), OrderNumber_c (Text(5)), Owner (Lookup/User), and Pricebook2 (Lookup/Price Book).

FIELDS ON OBJECTS:

Lead Object custom fields-->

Field Label	Datatype	Parent Object	Description
Product	Lookup	Cars List	This field holds the information of the product which the customer has shown interest in.
Campaign Name	Lookup	Campaign	This Field is created to know through which campaign the Lead is generated.

Lead Processes:

Actual --> This lead process contains how a normal lead process will be. Contains all the Lead status by default.

Direct --> This contains the process of customer who directly comes to the showroom where OPEN-NOT CONTACTED value is removed from the status field.

Record types:

The two lead processes have been assigned to two record types Direct & Other sources with same page layout (Lead layout).

Validation: If the lead source is campaign, then the campaign name should hold a value.

Account object custom fields-->

<i>Field Label</i>	<i>Datatype</i>	<i>Parent Object</i>	<i>Description</i>
Date of Delivery	Date/Time	N/A	contains the date on which the car is delivered
Warranty (SLA)	Picklist	N/A	The existing field Name is customized
Warranty (SLA) Expiry Date	Date	N/A	Contains the expiry date of the SLA
Warranty (SLA) Serial Number	Text (10)	N/A	Contains the serial no of the SLA
Product	Lookup	Cars List	This field holds the information of the product which the customer has shown interest in.
Active	Picklist	N/A	States whether the SLA is active or not.

Record types => Person & Customer Account.

The only difference is the person account contains the Last & First Name like contact object.

Contact object custom fields-->

It contains only the standard fields available for use, some unwanted fields are only removed.

Opportunity object custom fields-->

<i>Field Label</i>	<i>Datatype</i>	<i>Parent Object</i>	<i>Description</i>
Campaign Name	Lookup	Campaign	This Field is created to know through which campaign the Lead is generated.

Product	Lookup	Cars List	This field holds the information of the product which the customer has shown interest in.
Discount	Formula (Percent)	N/A	It calculates the discount percentage offered to the customer

Discount Formula: $(\text{Product_r.Selling_Price_c} - \text{Amount}) / \text{Product_r.Selling_Price_c}$

Taking the Amount field in opportunity as the Exact amount done sales to the customer but the actual selling price is mentioned in Car details object.

Mapped the custom field (Product) to the Account & opportunity for lead conversion.

Mapped the custom field (Campaign Name) to the opportunity for lead conversion.

Cars Object Custom fields-->

Field Label	Datatype	Values	Description	Parent Object
Car Name	Name	N/A	Holds the name of the car.	N/A
Fuel Type	Picklist	Petrol / Diesel	contains that which type of fuel does the car accepts.	N/A
Insurance Available	Checkbox	True/ False	whether the Insurance is current or not.	N/A
Insurance Expiry Date	Date	N/A	Expiry date of Insurance	N/A
Kms_Driven	Number (18)	N/A	The no.of Kms the car had been driven	N/A
Owner count	Number (2)	N/A	The count of owners owned the car before.	N/A
Seat capacity	Number (2)	N/A	Seat capacity of the car.	N/A
RC Verified	Checkbox	True/ False	Does the RC is verified or not.	N/A
Seller	M-D	N/A	The seller who is gives the car for sale	Seller Details (M-D)
Showroom price	Currency (15)	N/A	Current Price of the car	N/A
Selling price	Currency (18)	N/A	Selling price of the car in our showroom	N/A
Tank capacity	Number (2)	N/A	The petrol (or) Diesel capacity of the car	N/A
Transmission (Gear)	Picklist	Manual, Automatic	The type of the gear exists in the car	N/A

Year of Manufacture	Number (5)	N/A	Year the car had been manufactured	N/A
---------------------	------------	-----	------------------------------------	-----

Validation: If the Insurance available (Checkbox) is true then Insurance expiry date should not be blank & Insurance Expiry Date should be Greater than today

Field History Tracking is set to the Showroom price and Selling price field to track if there are any changes in the price of the car.

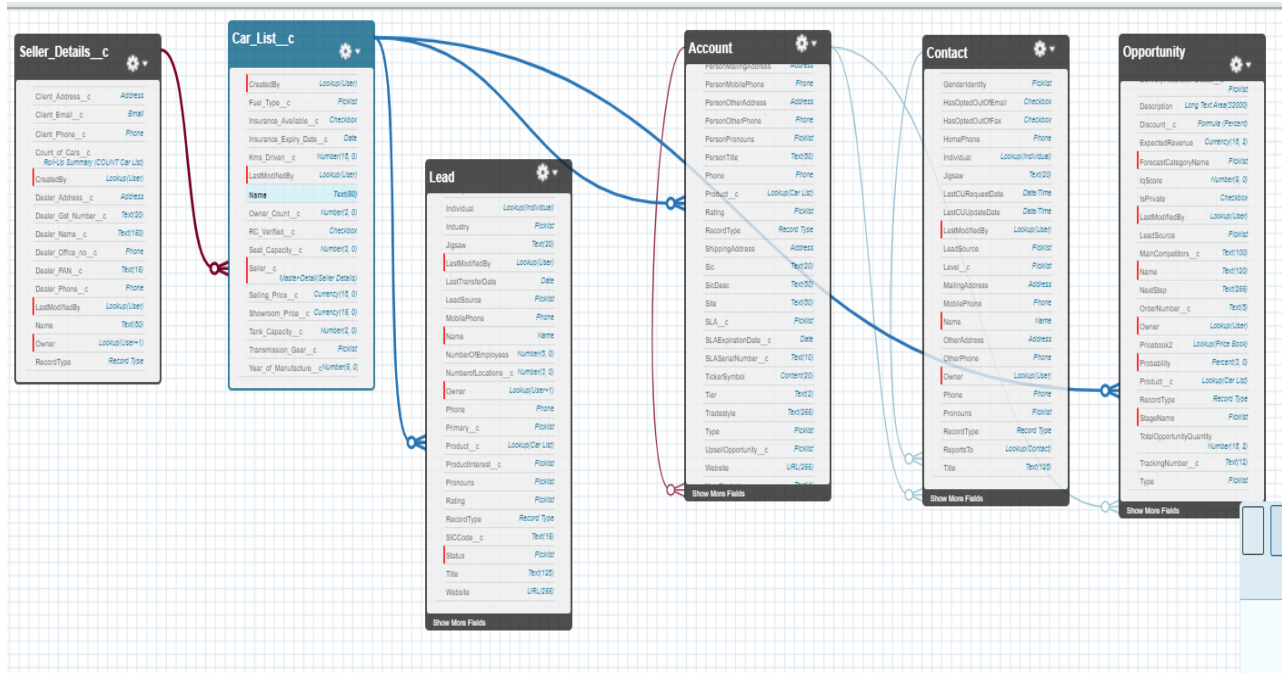
Seller Details object custom fields:

<i>Field Label</i>	<i>Datatype</i>	<i>Criteria</i>	<i>Description</i>
Client Name	Name	N/A	Name of the client whether individual or Dealer's company name
Client Phone	Phone	N/A	Phone number of the client
Client Email	Email	N/A	Email address of the client
Client Address	Address	N/A	Address of the client
Dealer Name	Text (150)	N/A	Name of officer in the dealer company
Dealer Phone	Phone	N/A	Phone number of the Dealer officer
Dealer Address	Address	N/A	Address of the Dealer
Dealer Office.no	Phone	N/A	Official Number of the dealer company
Counts of car	Roll up (Count)	Only the dealer records are taken into calculation	The count of cars from a particular dealer

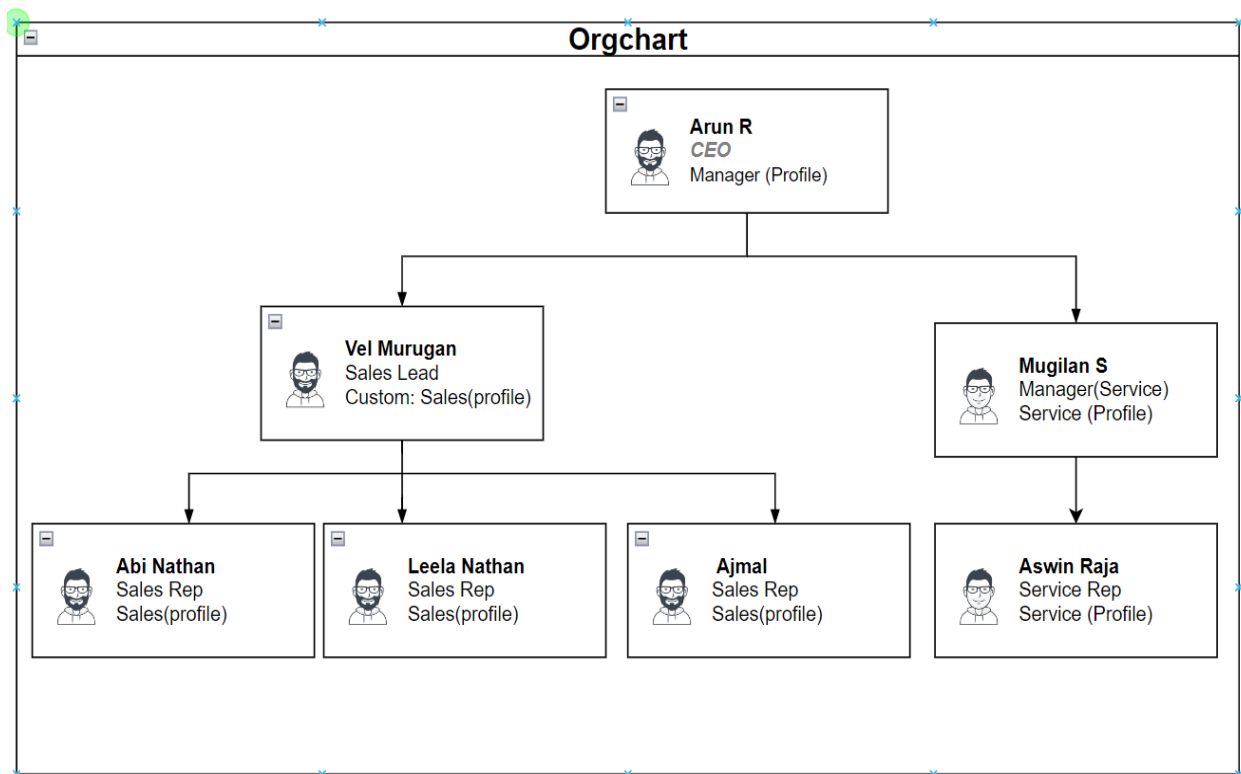
Record types: Individual & Dealer. Differentiated by two diff page layouts with diff fields on it.

Entity Relationship:

- Seller Details is the Master and Car List is the Detail object.
- Car List has been the parent which has the Lookup Relationship with lead, Account, Opportunity as Product Lookup Field in Those objects.



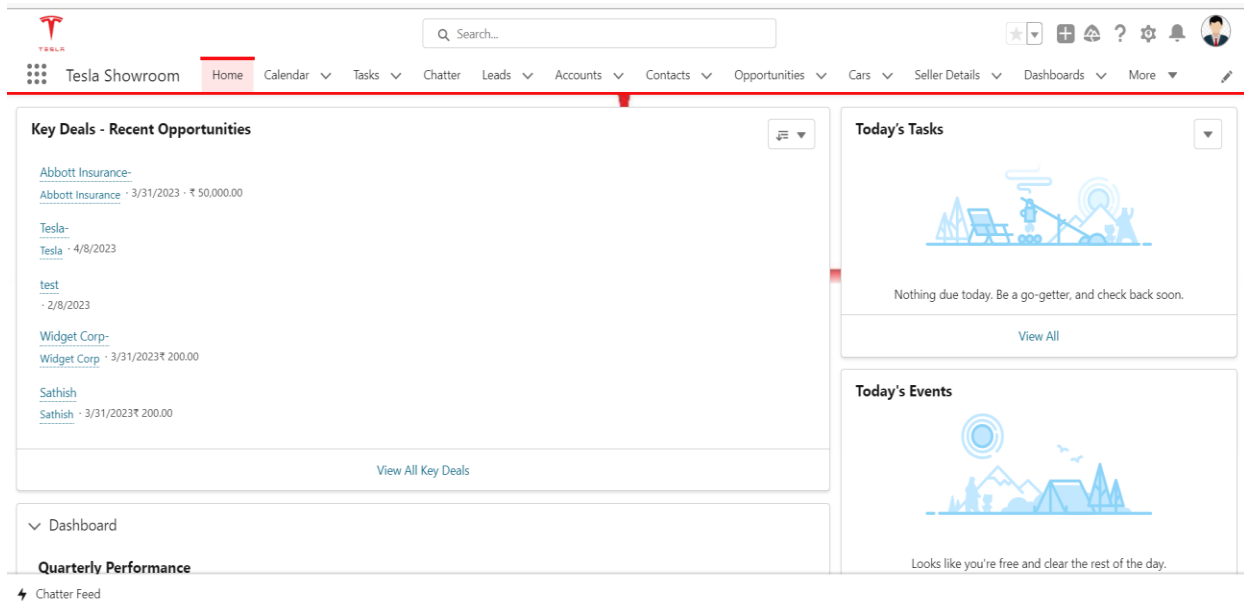
ORG CHART:



App Creation:

- Created an App named “Tesla showroom” using the App manager.

- Added the frequently used object tabs to the App.



Cases from other Sources:

Created an Email to case for my Showroom service & Repair Appointments through Email.

Now the Email which is received by the Service Reps are automatically created as Case record in the case object.

SETUP
Email-to-Case

☒ Place user signatures before email threads

On-Demand Service
 Let Salesforce handle incoming emails for you. The Email-to-Case on-demand service converts customer emails into cases or adds them to existing cases.

Enable on-demand service ☒

Choose how Email-to-Case handles emails that surpass your organization's daily email processing limit or emails from blocked senders.

Over email rate limit action	Bounce message
Unauthorized sender action	Discard message

Routing Addresses New | Email2Case

Action	Source	Routing Name	Case Owner	Email Address	Verification	Outbound Service	Email Services Address
Edit Del	Email2Case	Service and Repairs	Murugan Vel	yokeshyok6791@gmail.com	Verified	Gmail	yokeshyok6791@1ny36vewndwojb2f09exiyoldsrnk0kdck2ywjrtii318ayr6.587uygeay.ap26.case.salesforce.com

The Cases Raised by the Email will be automatically created as case in salesforce case object and assigned to the Velmurugan user.

- Also Created a web to case Form So that customers can fix appointment for the Service through the website.

- Created a Case Auto response rule for the Email and web to case customers. Through this they will receive an auto response mail after submitting their case.

Case Auto-Response Rule
[Help for this F](#)

Response Mail for Cases

Add rule entries that specify the criteria and email template to use to respond to cases. You can reorder rule entries on this page after you create them.

Rule Detail
[Edit](#)

Rule Name	Response Mail for Cases	Active	<input checked="" type="checkbox"/>
Created By	Yokesh M , 3/12/2023, 10:47 AM	Modified By	Yokesh M , 3/16/2023, 9:52 AM

[Edit](#)

Rule Entries
[New](#)
[Reorder](#)

Action	Order	Criteria	Sent From (Email)	Template
Edit Del	<input type="text" value="1"/>	Case: Case Origin EQUALS Phone,Email,Web	Tesla Showroom (yokeshyoki76@gmail.com)	Support: Case Response

Lead generation from website:

- Created a Web to Lead form to generate leads through web pages.
- Created a Lead assignment rule and activated it. The rule if the lead source is web and phone enquiry, the Lead records will be assigned to sales queue.
- Then created a Lead Auto response rule for the web to lead customers.

Web-to-Lead Auto-Response Rule
[Help](#)

Lead Creation

Add rule entries that specify the criteria and email template to use to respond to leads. You can reorder rule entries on this page after you cre

Rule Detail
[Edit](#)

Rule Name	Lead Creation	Active	<input checked="" type="checkbox"/>
Created By	Yokesh M , 3/12/2023, 10:48 AM	Modified By	Yokesh M , 3/12/2023, 10:50 AM

[Edit](#)

Rule Entries
[New](#)
[Reorder](#)

Action	Order	Criteria	Sent From (Email)	Template
Edit Del	<input type="text" value="1"/>		Tesla ShowRoom (yokeshyok6791@gmail.com)	Marketing: Product Inquiry Response

Branding in salesforce:

Created a custom theme with different images and color. Given different logo and image for the loading page. Also changed the user Avatar.

TESLA

Search Setup

Star

Plus

Home

Help

Settings

Notifications

User

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

Data

Email

PLATFORM TOOLS

SETUP

Home

Create

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 Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

Get Started

Most Recently Used

10 items

TESLA

Search...

Star

Plus

Home

Help

Settings

Notifications

User

Library

Books

Library Member

Students

Categories

Accounts

Customer Account

C_Leads

Opportunities

Contacts

More

Books

Recently Viewed

New

Import

Change Owner

2 items • Updated a few seconds ago

Search this list...

Book Name

1

2

Attitude is Everything

Rich Dad Poor Dad

Domain Name Change:

- Q Domain

▼ Email

▼ Email Delivery Settings

Email Domain Filters

▼ User Interface

▼ Sites and Domains

Custom URLs

Domains

Sites

▼ Company Settings

My Domain

▼ Security

CSP Trusted Sites

SETUP

My Domain

My Domain Settings

My Domain showcases your company's brand and keeps your data more secure. The domains that Salesforce hosts for your org include your company-specific My Domain name.

Set up a My Domain in three steps:

✓ 1. Choose and register a My Domain

✓ 2. Salesforce provisions your new domain

3. Deploy your new domain to users

Step 3: Deploy Your New Domain

Your new domain is provisioned. To start using it, deploy your domain. After you deploy, users that visit your current domain are redirected to your new domain.

If you don't want to use the new domain or if you want to make a different change to your My Domain, cancel the new domain.

Current domain

mindful-shark-3eqtyp-dev-ed.my.salesforce.com with enhanced domains

New domain

tesla-showroom-dev-ed.my.salesforce.com with enhanced domains


Cancel New Domain

Deploy New Domain

Didn't find what you're looking for?

Try using Global Search.

EMAIL TEMPLATE For the Approval process:

 A Record is Assigned to you for Approval

* From

Yokesh M <yokeshyokii76@gmail.com>

To

Cc

Bcc

yokeshyokii76@gmail.com X

Subject

A Record is Assigned to you for Approval

Font


Size


B


I


U


A






















Hi Man,


A Record has been assigned to you for an Approval since the discount is more than 5% for an opportunity. Kindly check that.


Regards,

Tesla Showroom.










Related To

 Screen Flow test X

Send

CRITERIA: If the Discount percentage (Formula field) in an Opportunity is more than 5% then the record will be sent for Approval to his Manager. If it is below 5% the record will be Auto- Approved.



SETUP

Approval Processes

Process Definition Detail

[Edit](#) [Clone](#) [Delete](#) [Activate](#)

Process Name	Discount % greater than 5	Active	<input type="checkbox"/>
Unique Name	Discount_greater_than_5	Next Automated Approver Determined By	Manager of Record Owner
Description	If the Discount percentage offered to the customer is more than 5, then the approval process should run.		
Entry Criteria	Opportunity: Discount GREATER THAN 5		
Record Editability	Administrator OR Current Approver	Allow Submitters to Recall Approval Requests	<input checked="" type="checkbox"/>
Approval Assignment Email Template	Approval Template		
Initial Submitters	Opportunity Owner, Record Creator		
Created By	Yokesh M. 3/24/2023, 10:51 AM	Modified By	Yokesh M. 4/4/2023, 5:36 AM

Initial Submission Actions [?](#)[Add Existing](#) [Add New](#)

Action	Type	Description
Record Lock		Lock the record from being edited

Approval Steps [?](#)[New Approval Step](#)

Action	Step Number	Name	Description	Criteria	Assigned Approver	Reject Behavior
Show Actions Edit Del	1	Manager Approval		Opportunity: Discount GREATER THAN 5 , else Approve	Manager	Final Rejection

- Automated the Approval submission work Through Flow Builder.



Record-Triggered Flow
Start

Run Immediately




Discount Approval
Action



End

Edit Action

Use values from earlier in the flow to set the inputs for the "Submit for Approval" core action. To use its outputs later in the flow, store them in variables.

Discount Approval (Discount_Approval) 

Set Input Values

A_a * Record ID

{!\$Record.Id}

A_a Approval Process Name Or ID

Discount_greater_than_5




Include

A_a Next Approver IDs



Don't Include

 Skip Entry Criteria



Don't Include

A_a Submission Comments

Auto Submitted Through Flow



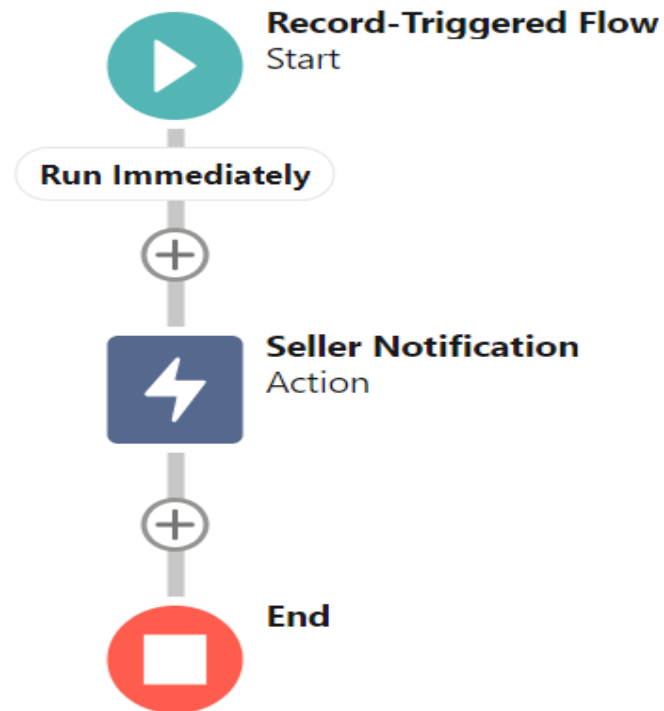
Include

Cancel

Done

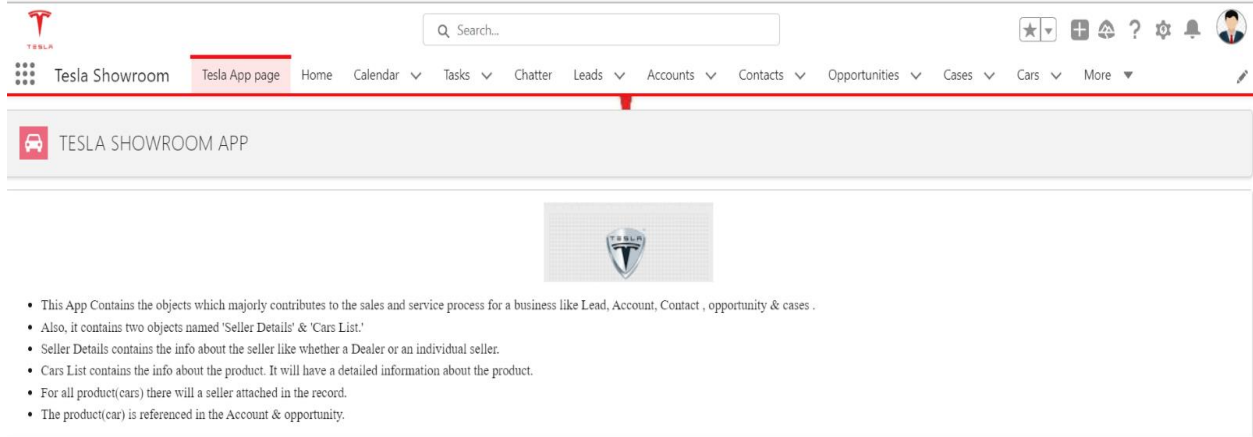
Reference: <https://help.salesforce.com/s/articleView?id=000392569&type=1>

- Email Alert to notify that a new Individual seller (Seller Object) is added.

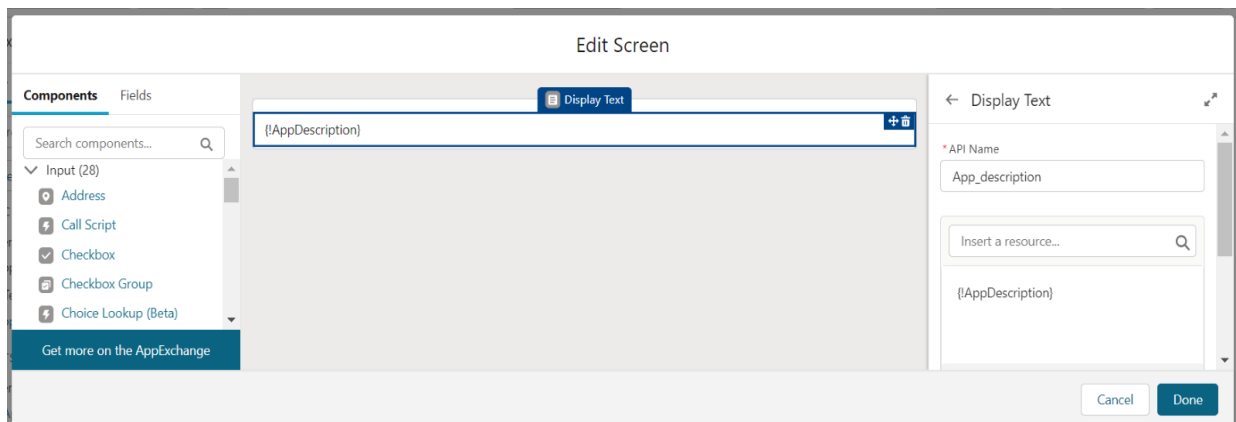


App Page for the Application:

App page for the showroom app using a screen flow.



Mentioned the use of the App and described how the data is being stored in objects.




Edit Text Template

AppDescription

This Resource contains the Information about the Tesla Application.

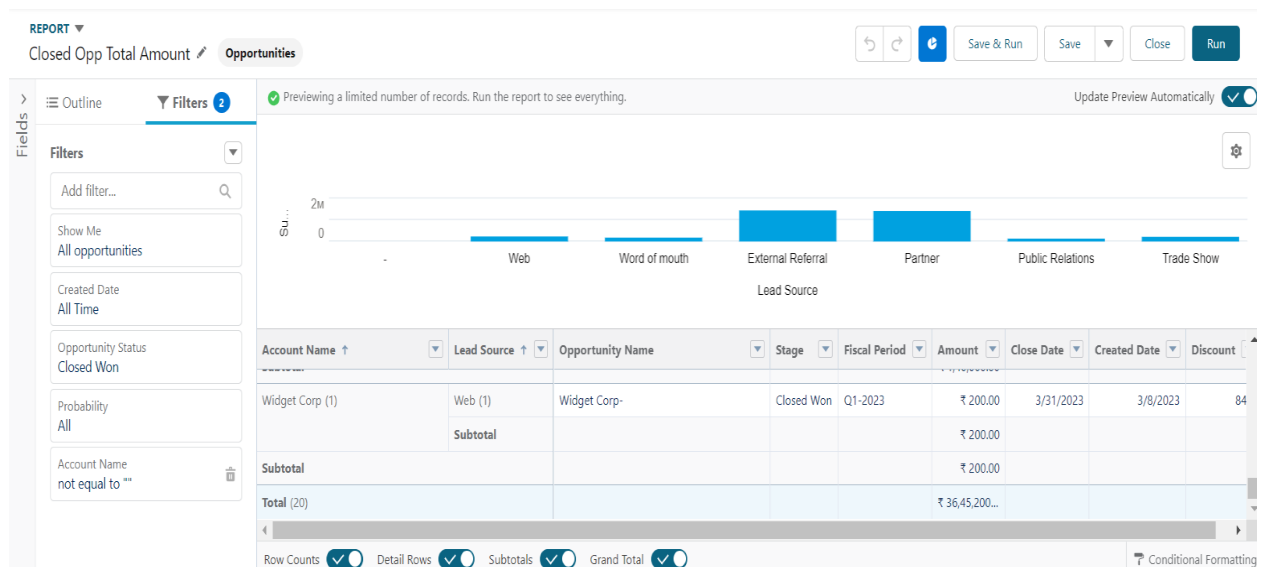
* Body



- This App Contains the objects which majorly contributes to the sales and service process for a business [like Lead](#), [Account](#), [Contact](#), [opportunity](#) & [cases](#).
- Also, it contains two objects named 'Seller Details' & 'Cars List.'
- Seller Details contains the info about the seller like whether a Dealer or an individual seller.
- Cars List contains the info about the product. It will have a detailed information about the product.
- For all product(cars) there will a seller attached in the record.
- The product(car) is referenced in the Account & opportunity.

Finding the Total amount of sales:

Created a Summary Report on opportunity report type to find the total amount generated through this business. Grouped by stage & acc name. Also generated a chart to find the amount generated based on Lead sources.



A dashboard of this report for better visual experience.



Dashboard

Lead source of opp closed

As of Apr 13, 2023, 11:41 PM Viewing as Yokesh M

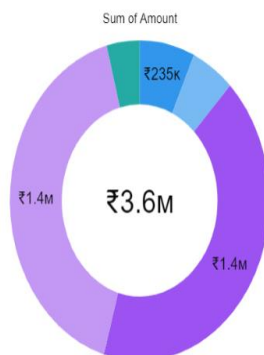
Refresh

Edit

Subscribe



Closed Opp Total Amount



Lead Source

Web

Word of mouth

External Referral

Partner

Public Relations