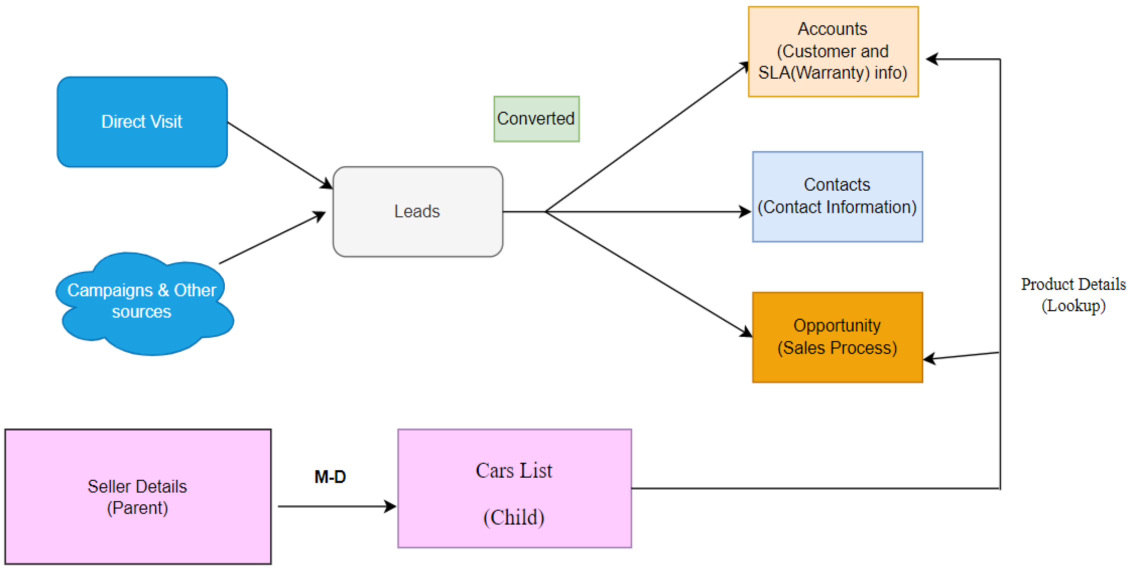
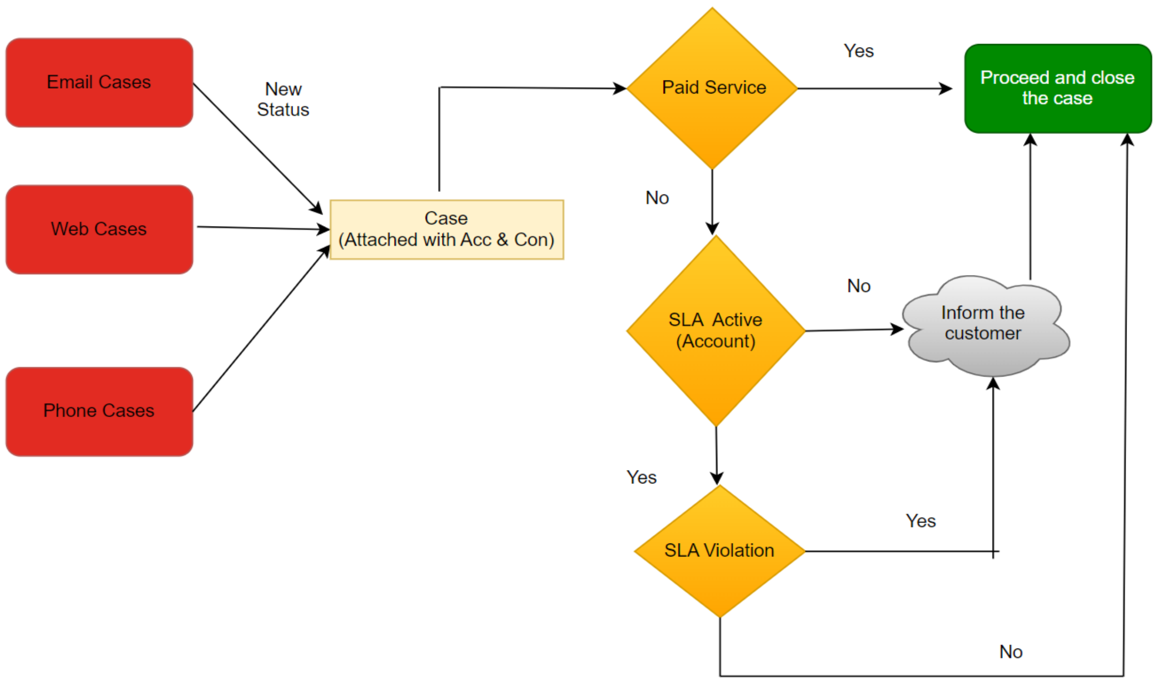
TESLA CAR SHOWROOM

SALES PROCESS:

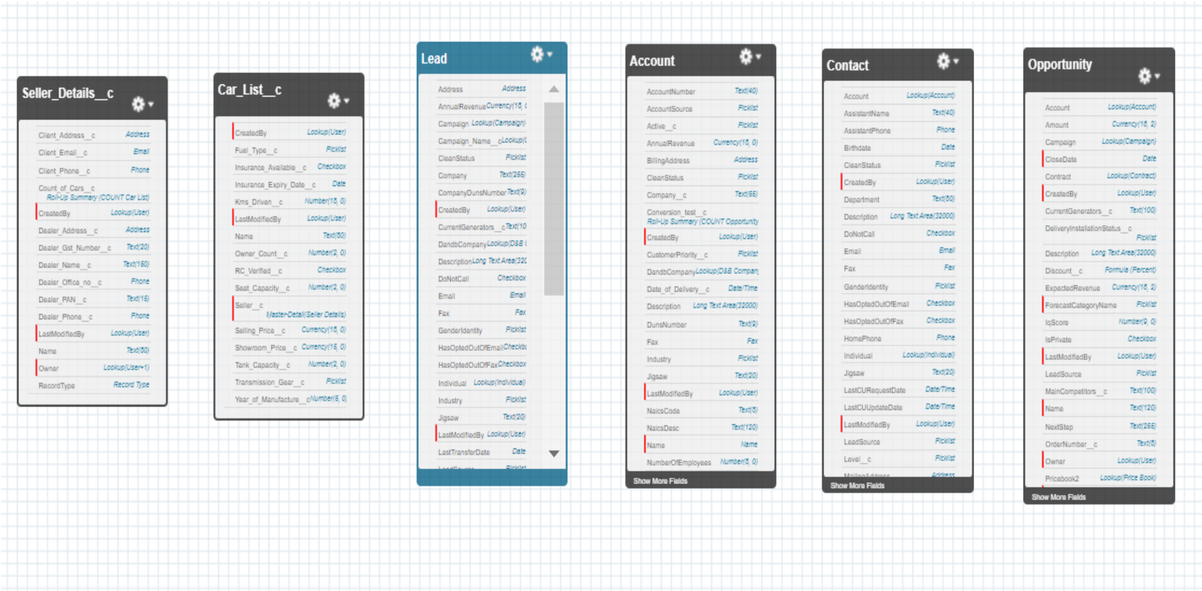


SUPPORT PROCESS:



DATA MODEL:

- Seller Details Object is used to Track the details of the Clients who are going to 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 & cases are used for their standard purposes.



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 a 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 the same page layout (Lead layout).

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

Account object custom fields-->

Field Label	***Datatype***	***Parent Object***	***Description***
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 customised
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-->

Field Label	***Datatype***	***Parent Object***	***Description***
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:

(Product__r.Selling_Price__c - Amount) / 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 the Car details object

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- 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 which type of fuel 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	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

Data 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:

Field Label	***Datatype***	**Criteria**	***Description***
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

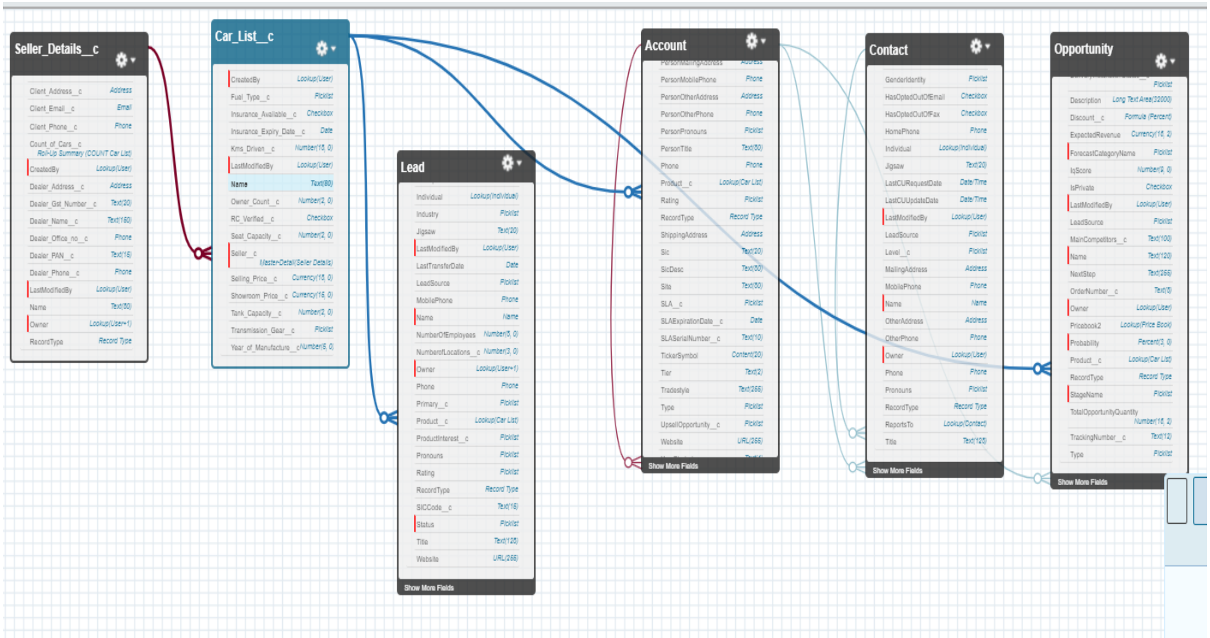
Record types:

Individual & Dealer.

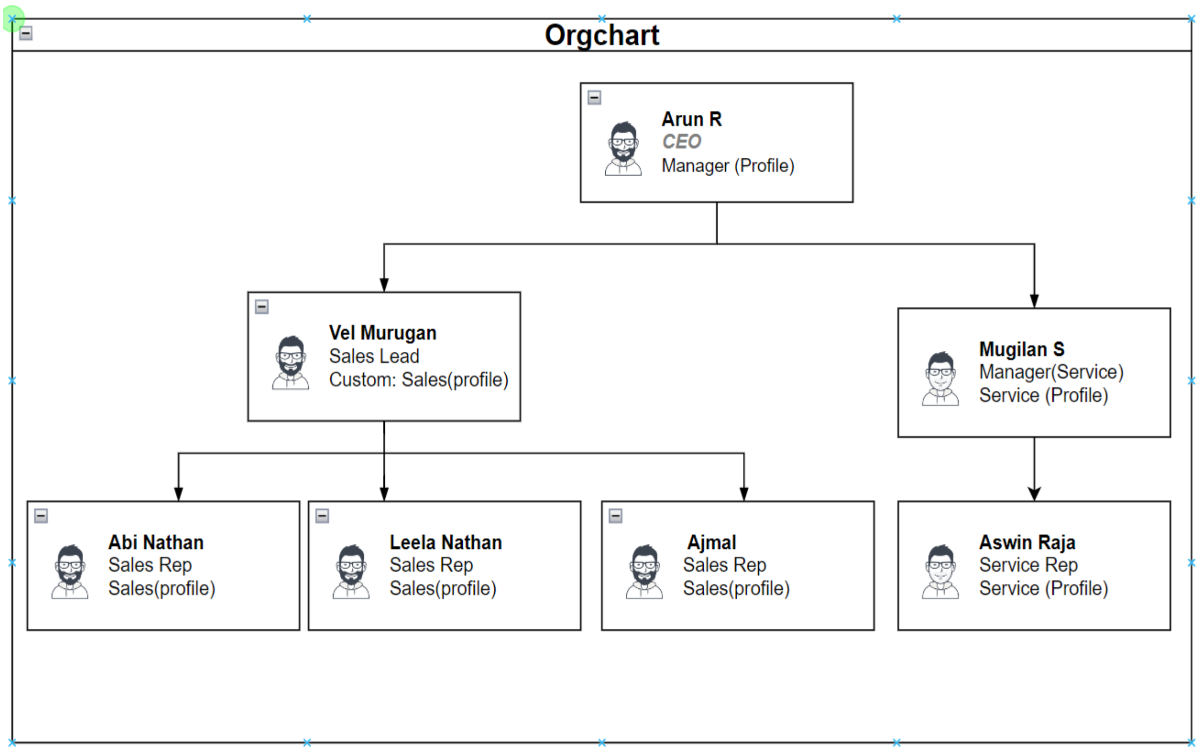
Differentiated by two diff page layouts with diff fields on it.

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.

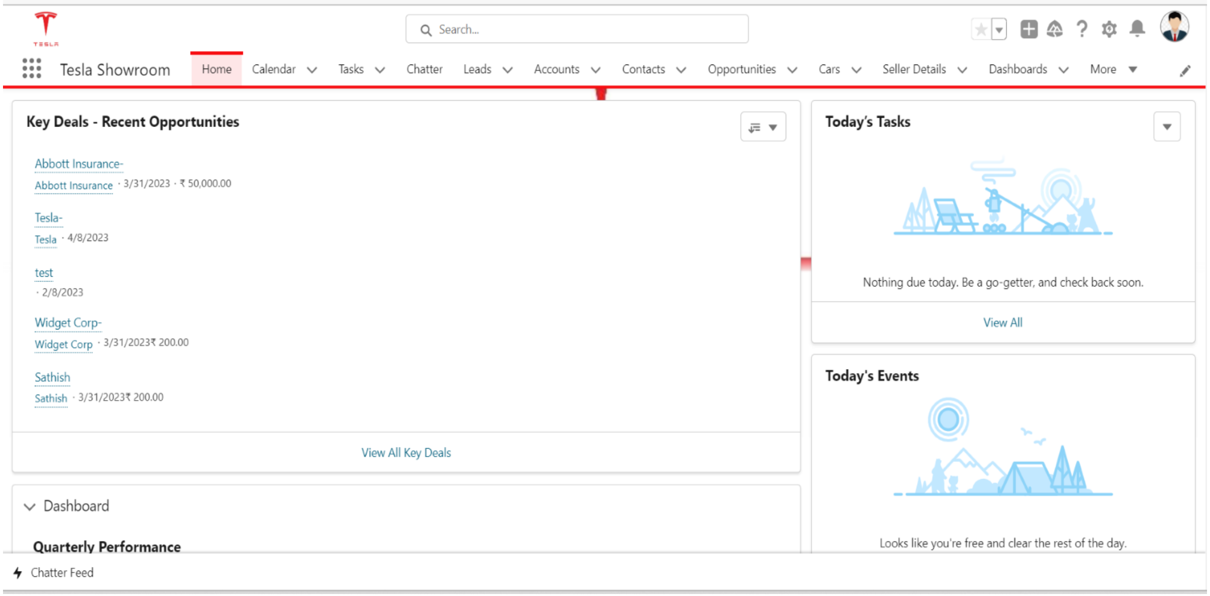


ORG CHART: (For Security settings)



App Creation:

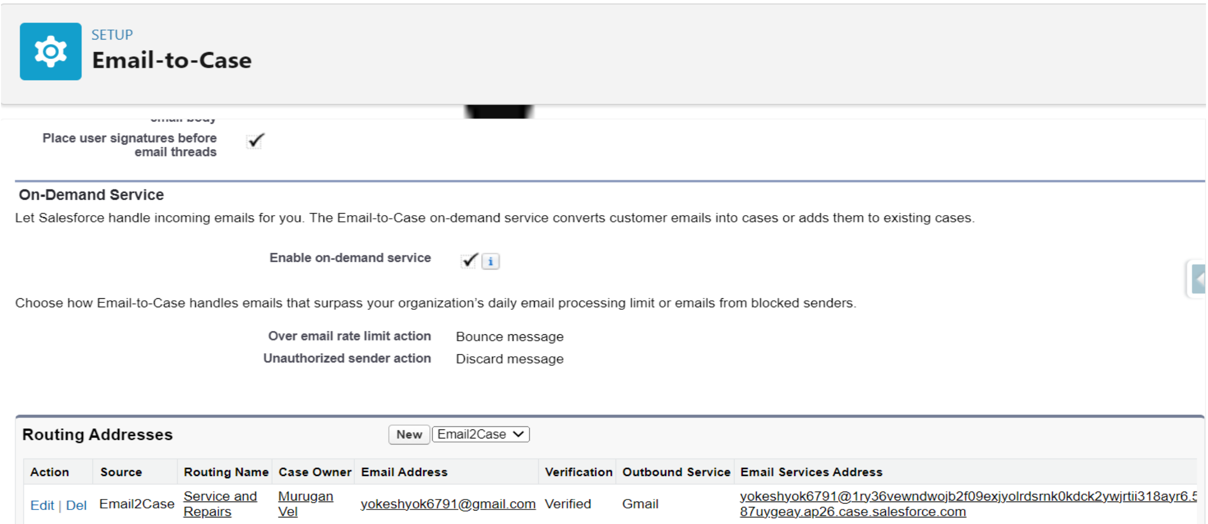
- Created an App named "Tesla showroom" using the App manager.
- Added the frequently used object tabs to the App.



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.



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

- Also Created a web to case Form So that customers can fix appointments 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 email after submitting their case.

Case Auto-Response Rule

Response Mail for Cases

Help for this F

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	✓
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	1	Case: Case Origin EQUALS Phone,Email,Web	Tesla Showroom (yokeshyokii76@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 the sales queue.
- Then created a Lead Auto response rule for the web to lead customers.

Web-to-Lead Auto-Response Rule

Lead Creation

Help f

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	✓
Created By	Yokesh M, 3/12/2023, 10:48 AM	Modified By	Yokesh M, 3/12/2023, 10:50 AM

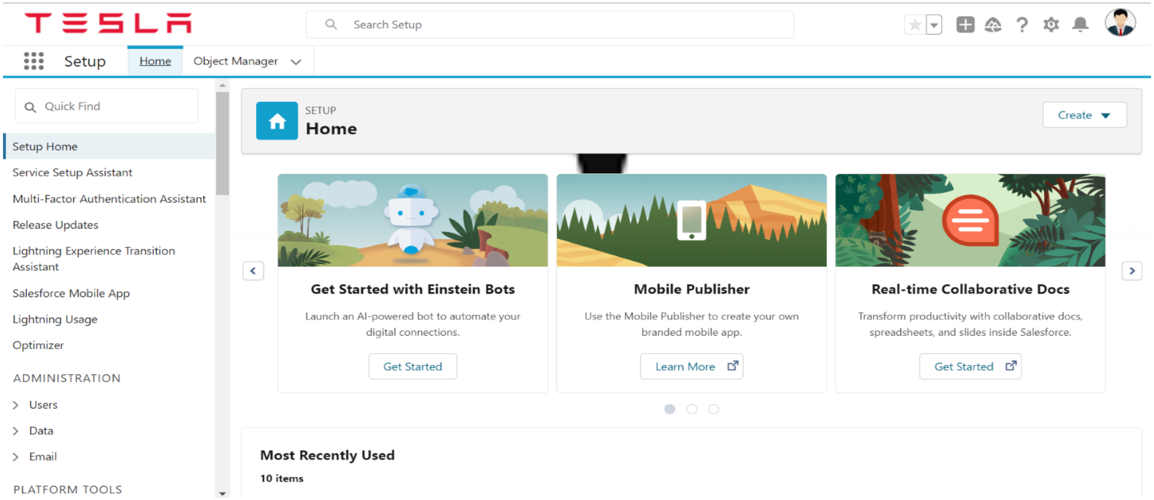
Edit

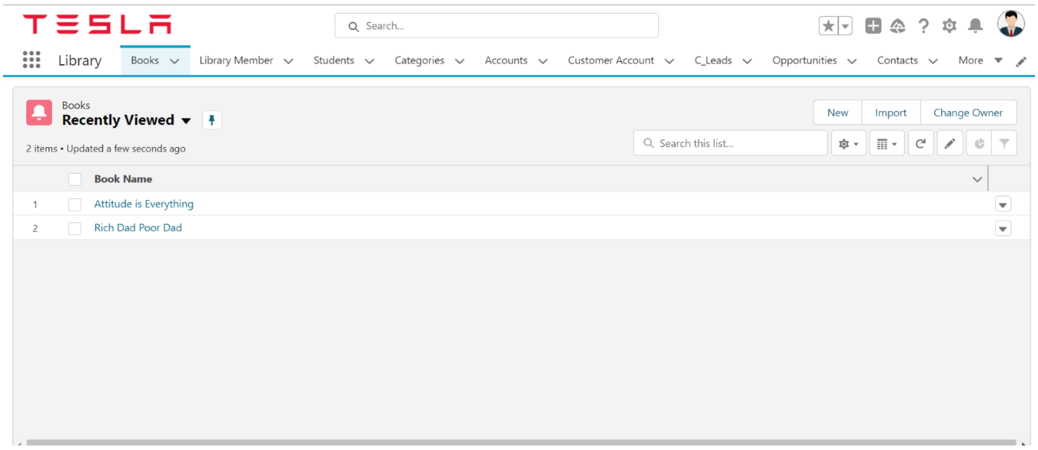
Rule Entries New Reorder

Action	Order	Criteria	Sent From (Email)	Template
Edit | Del	1		Tesla ShowRoom (yokeshyok6791@gmail.com)	Marketing: Product Inquiry Response

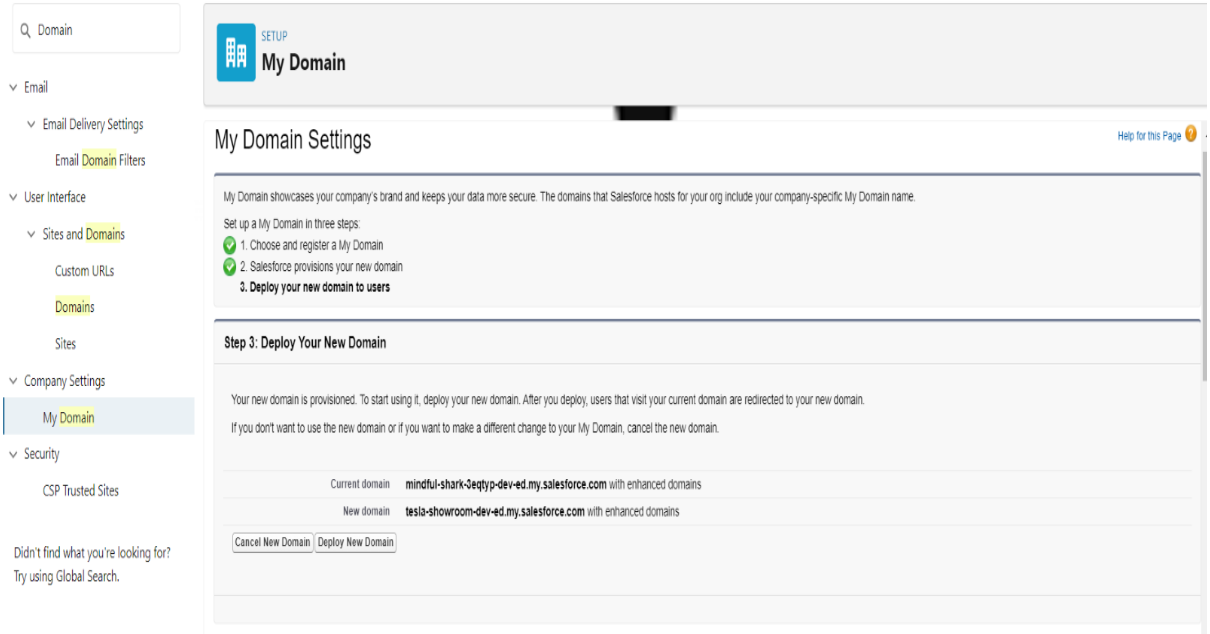
Branding in salesforce:

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

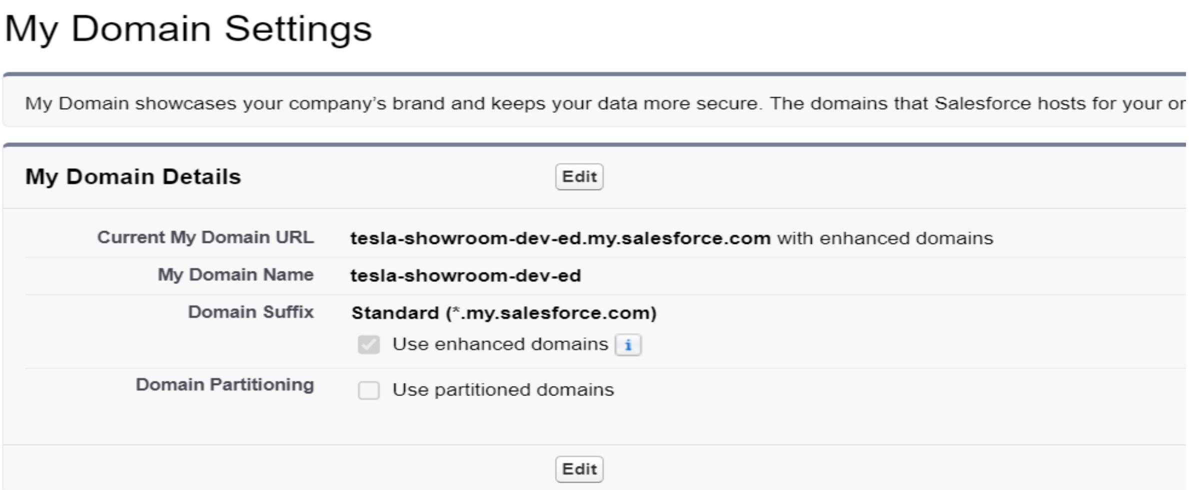




Domain Name Change:



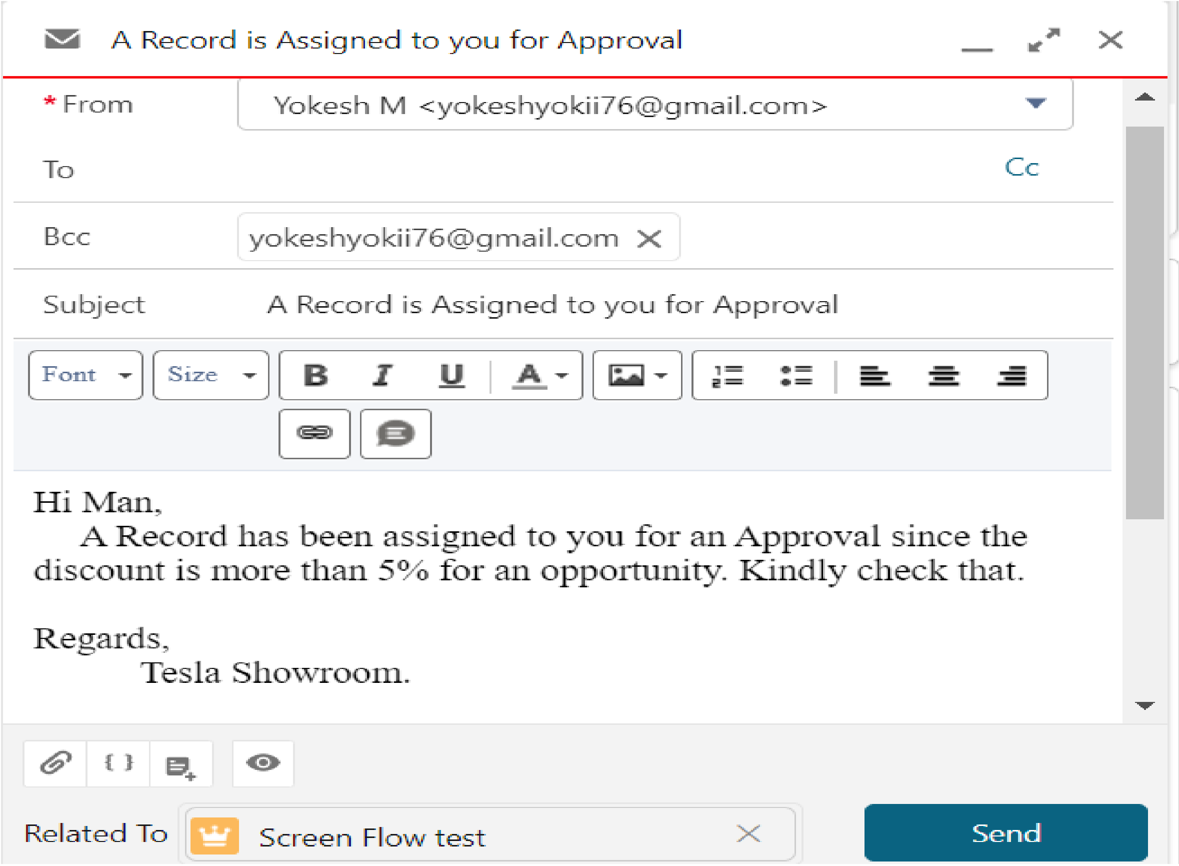
Current Domain Name & URL -->



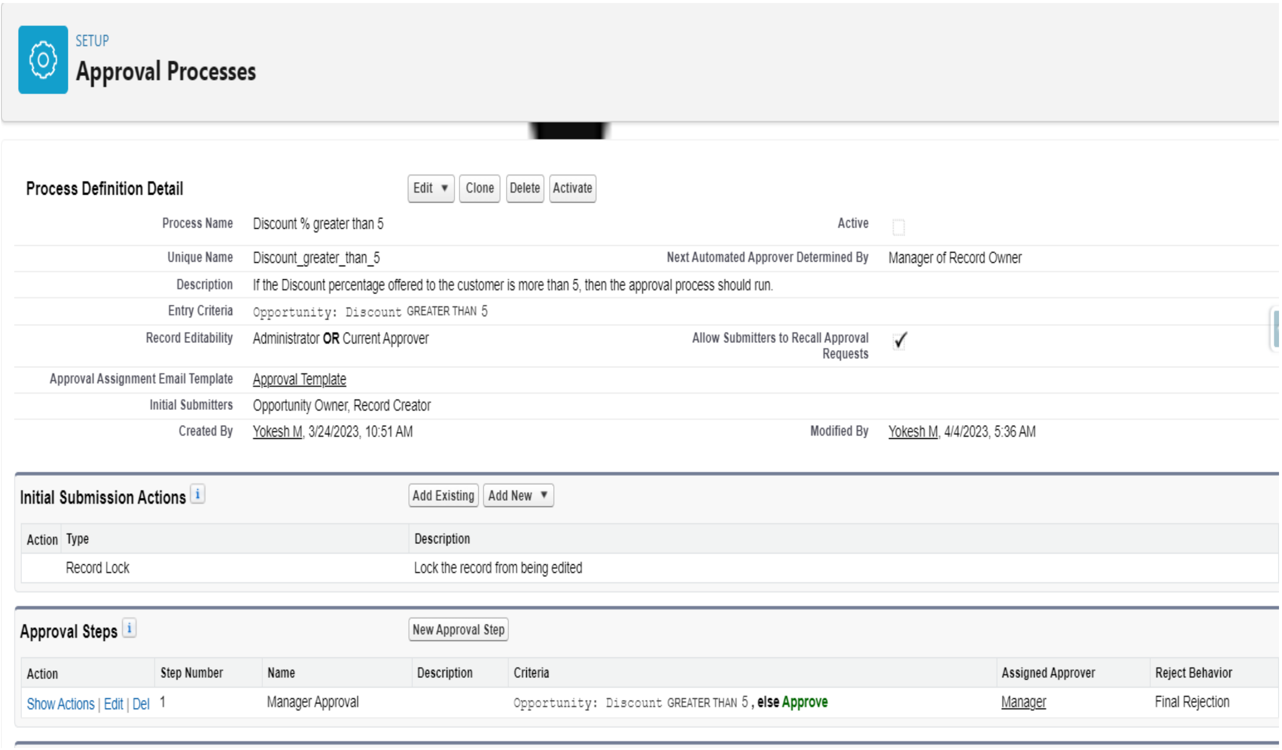
Automations:

- Approval process on the opportunity object

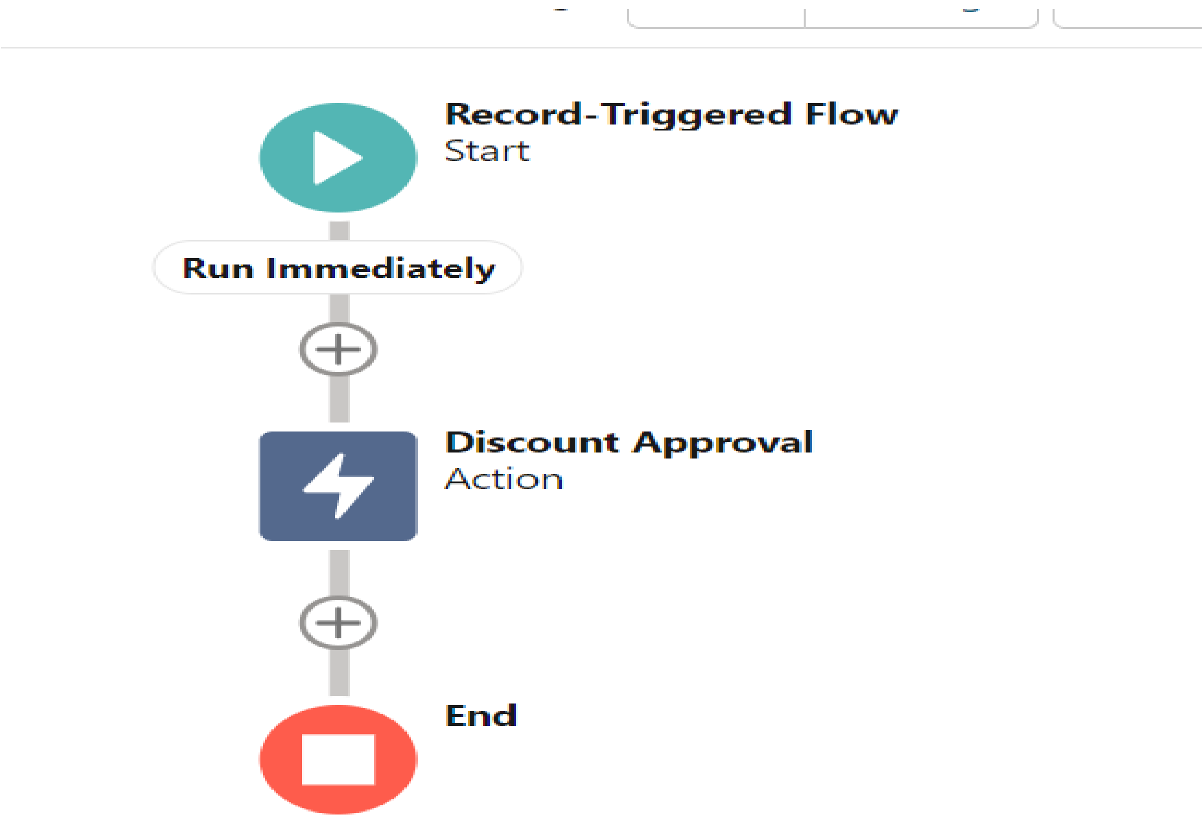
EMAIL TEMPLATE For the Approval process:

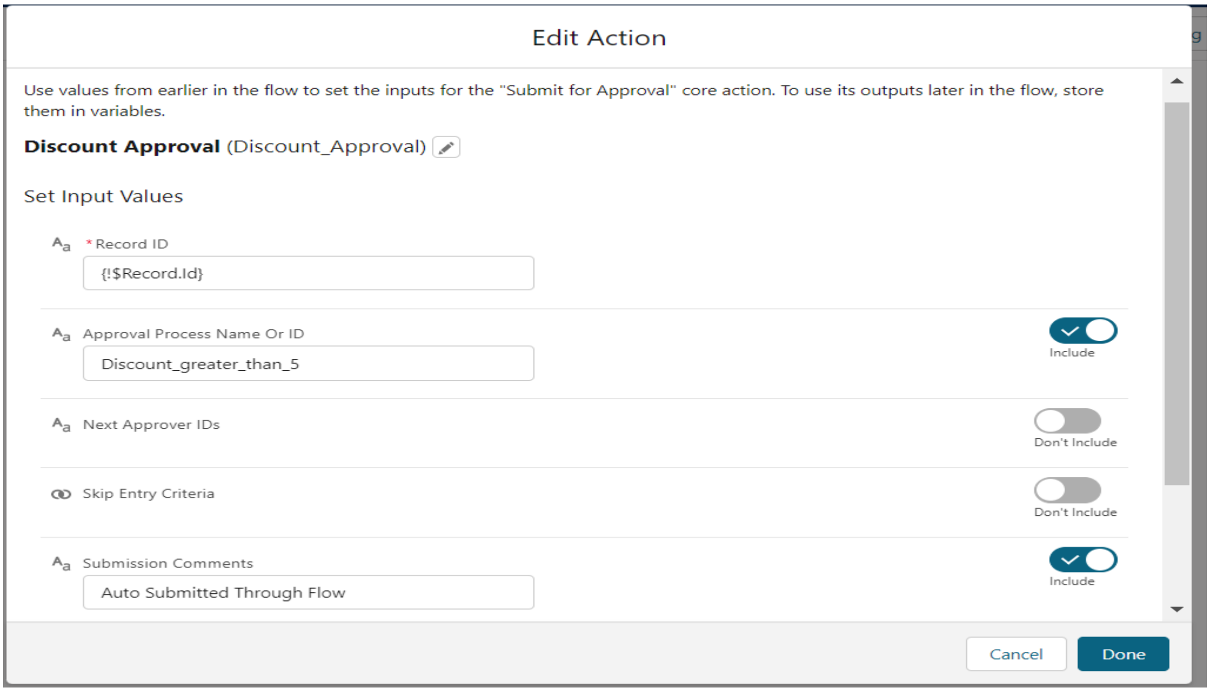


CRITERIA: If the Discount percentage (Formula field) in an Opportunity is more than 5% then the record will be sent for Approval to his Manager. If it is below 5% the record will be Auto- Approved.



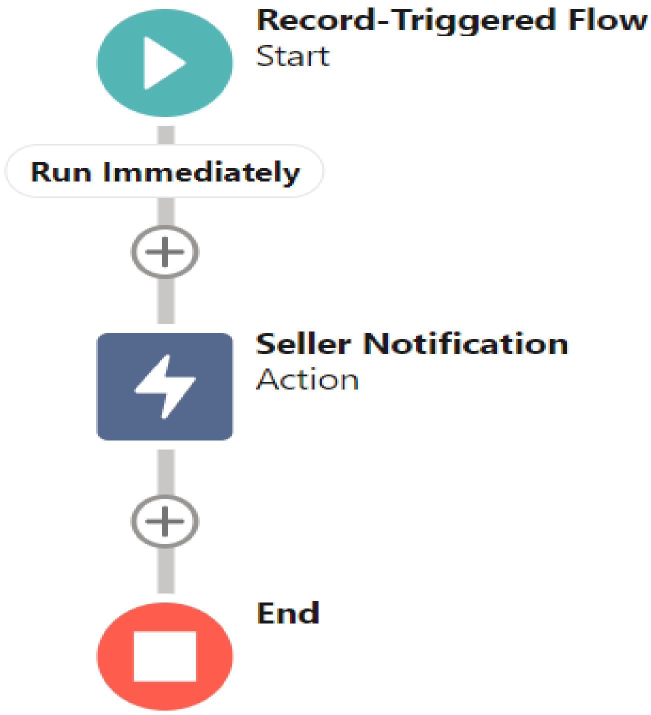
- Automated the Approval submission work Through Flow Builder.





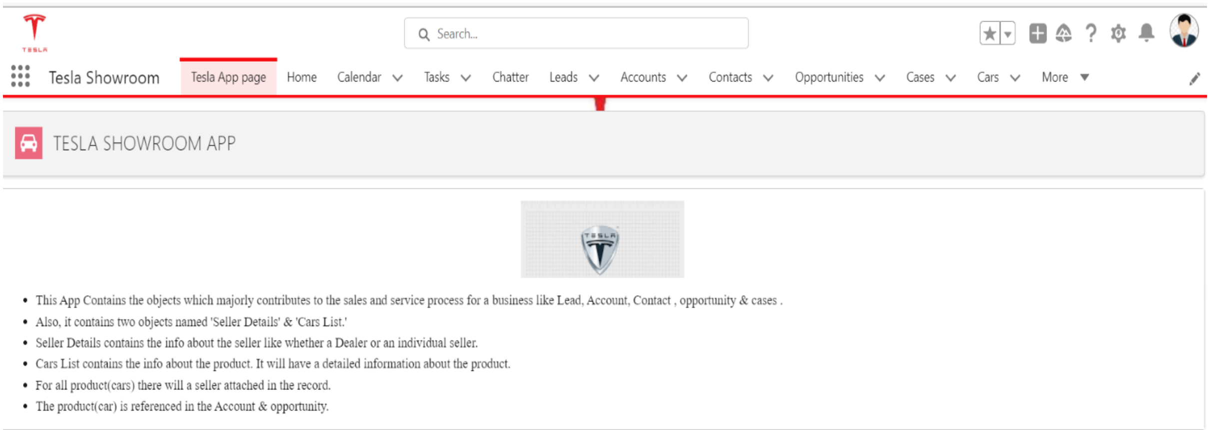
Reference: https://help.salesforce.com/s/articleView?id=000392569&type=1

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

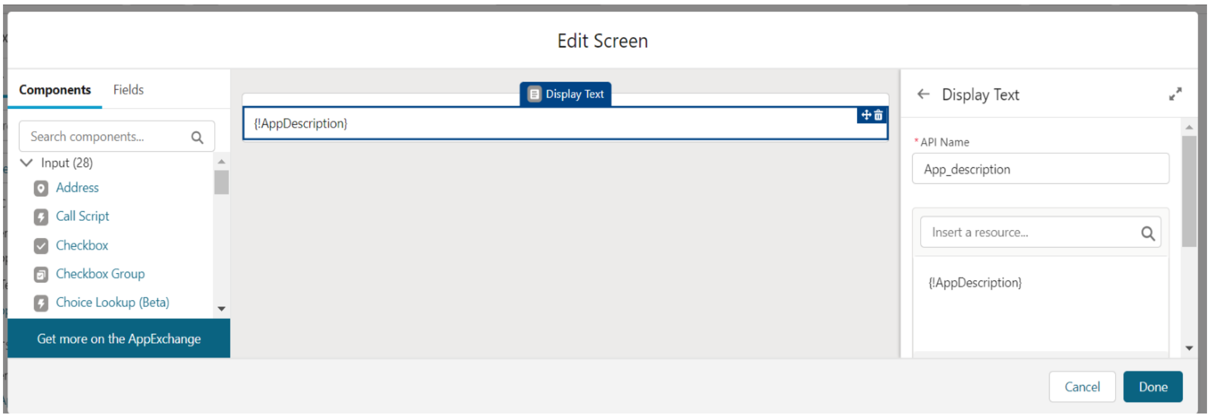


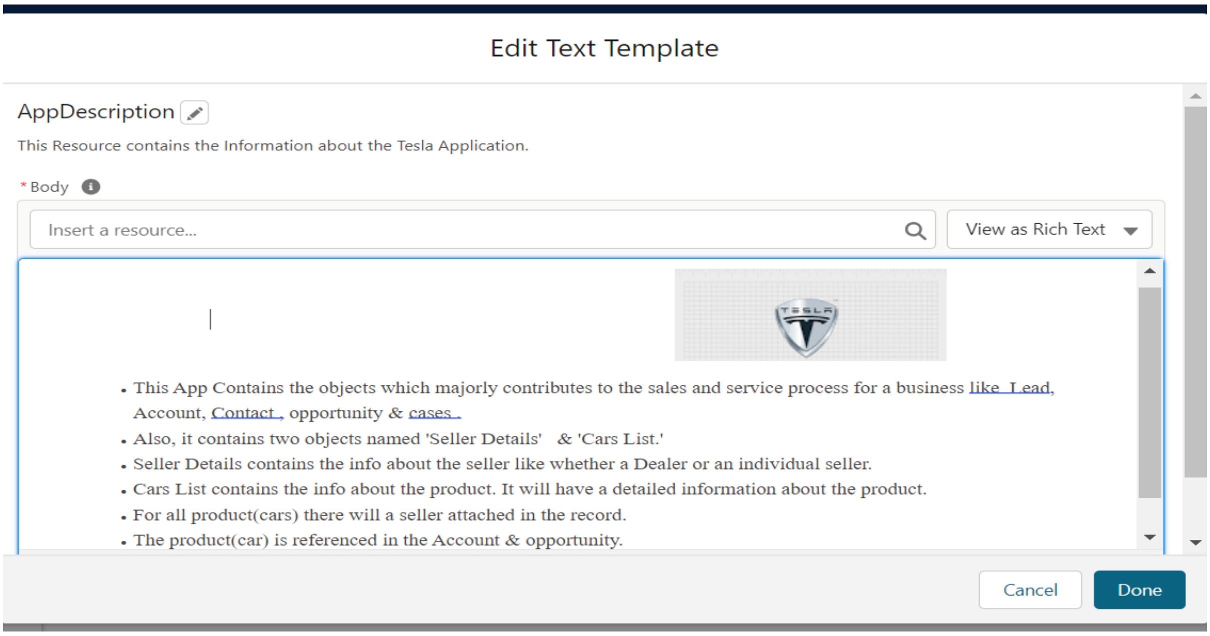
App Page for the Application:

App page for the showroom app using a screen flow.



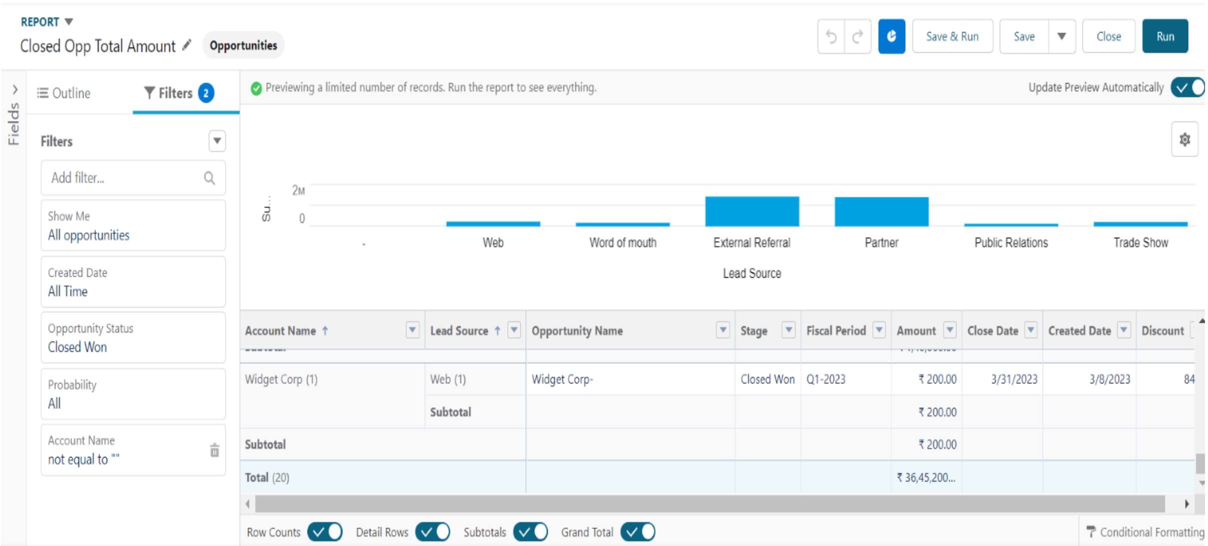
Mentioned the use of the App and described how the data is being stored in objects.





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.