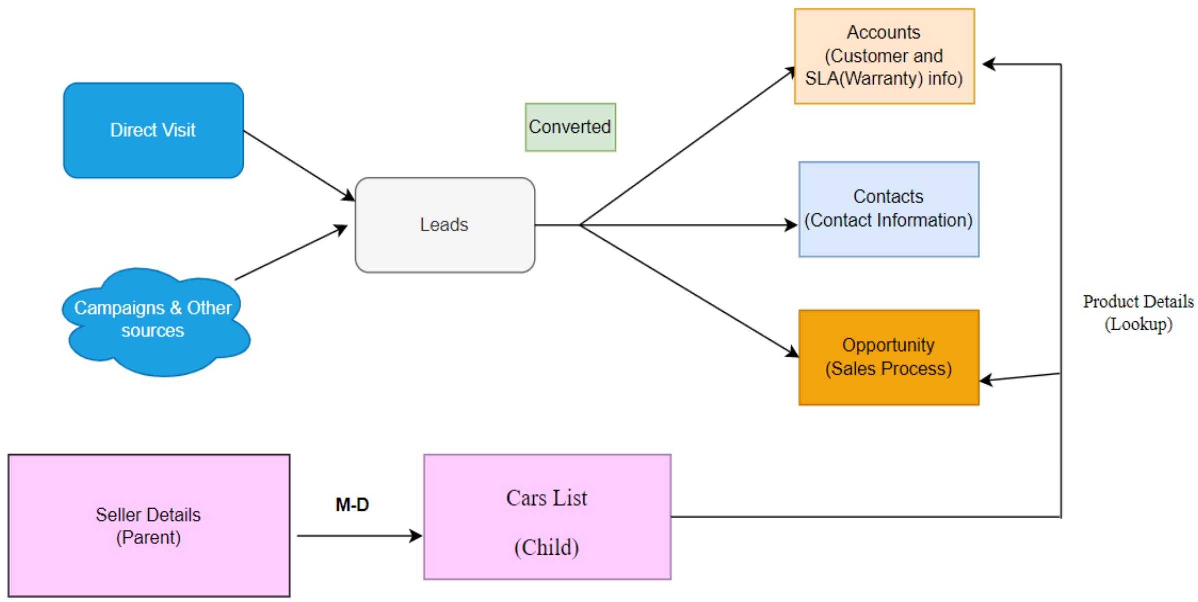
TESLA CAR SHOWROOM

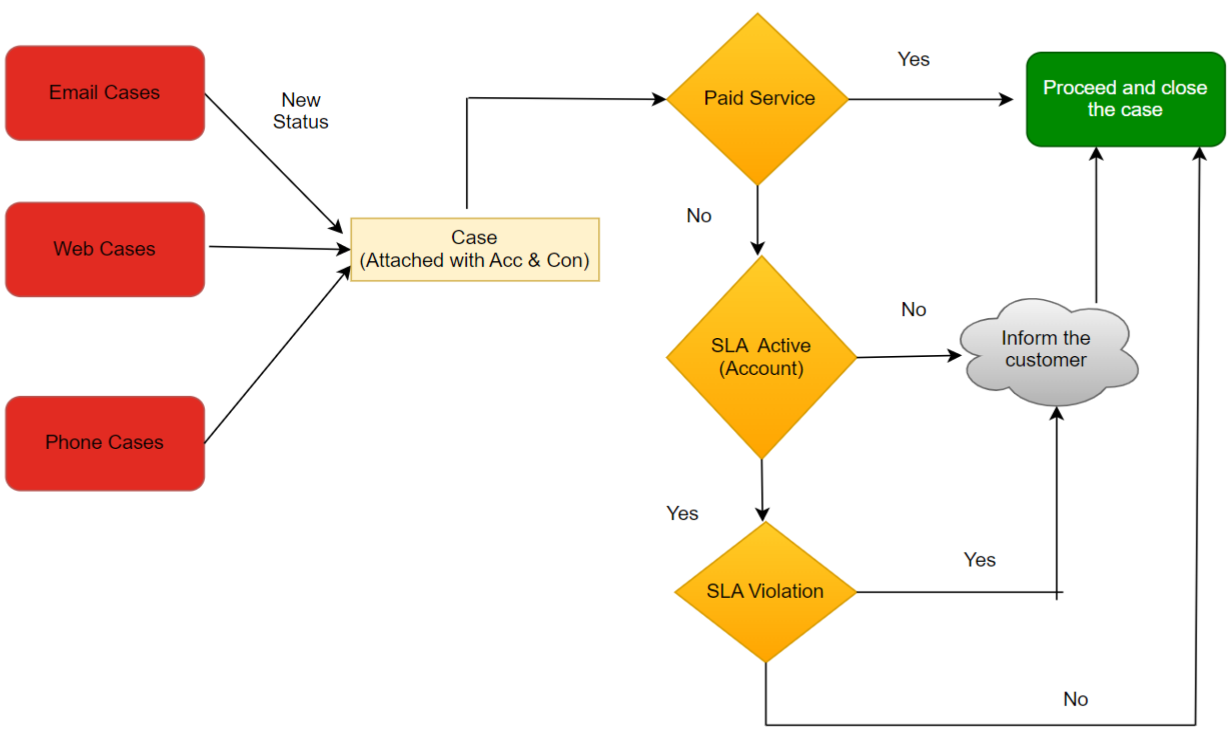
Case Study about Business:

- 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:

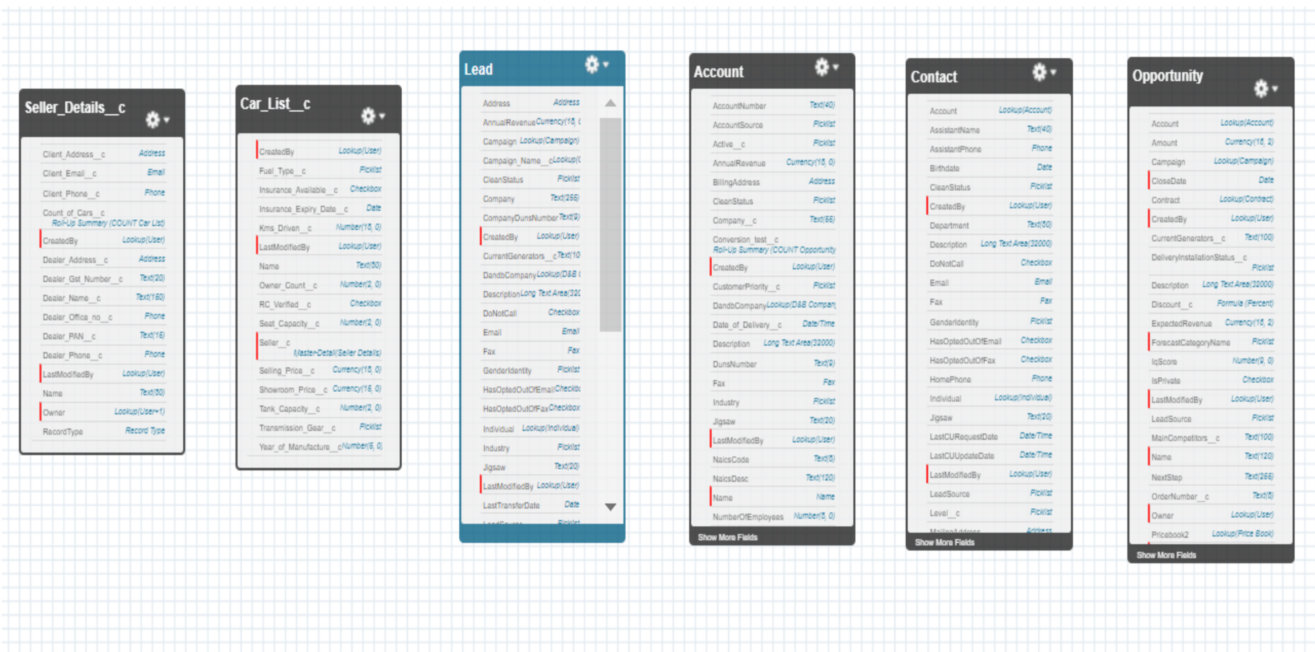


SUPPORT PROCESS:



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.



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-->

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 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-->

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 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) Disel 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.

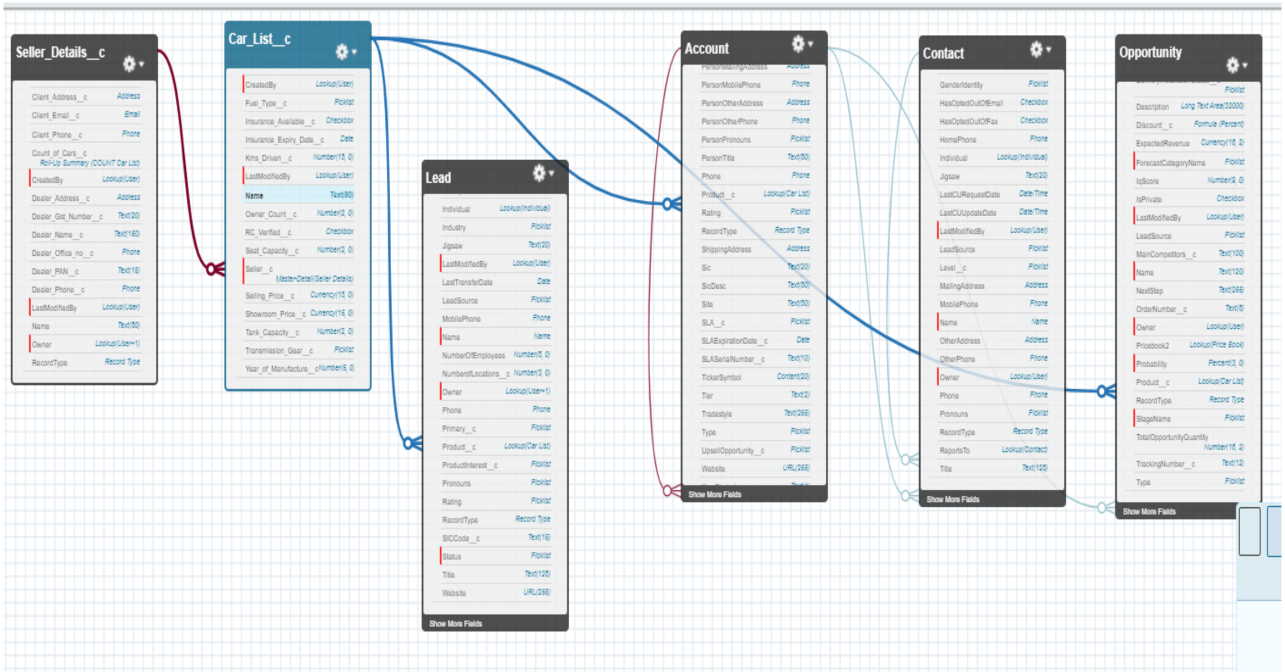
Seller Details object custom fields:

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

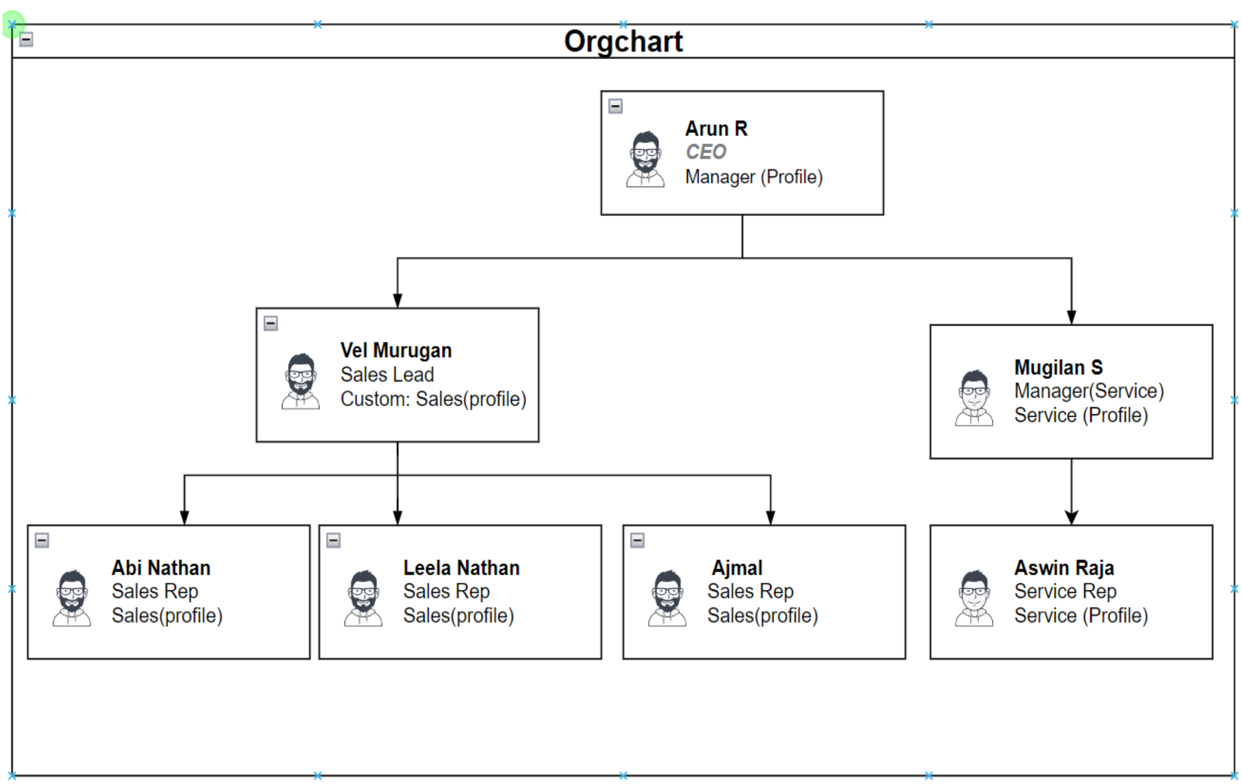
Record types: Individual & Dealer. Differentiated by two diff page layouts with diff fields on it.

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.



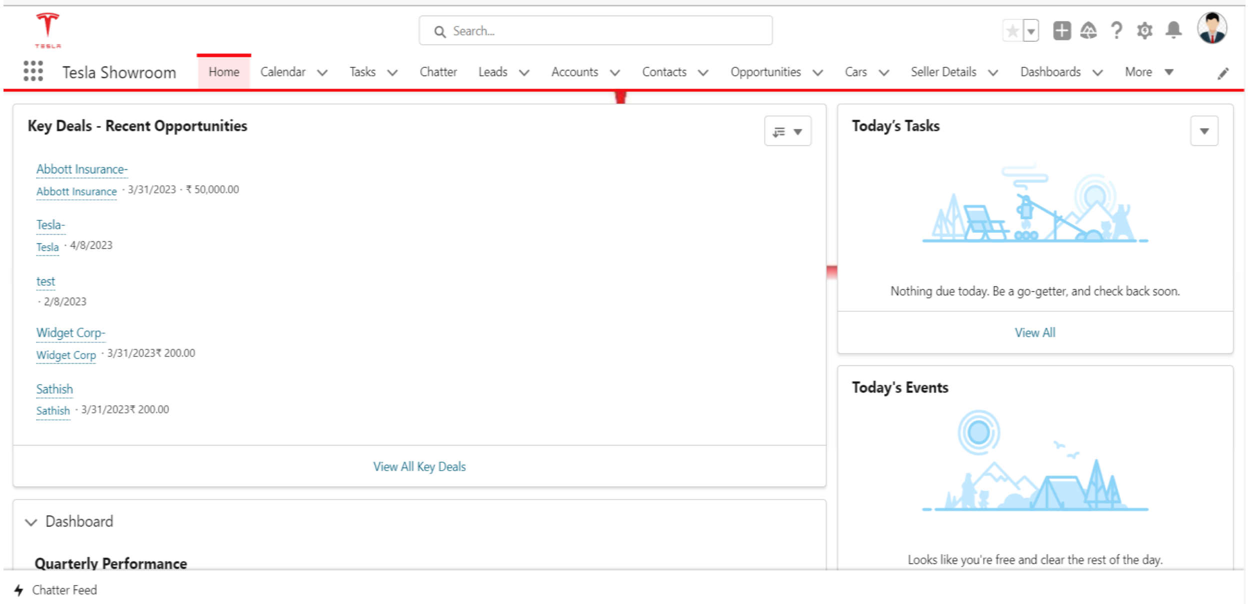
ORG CHART:



App Creation:

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

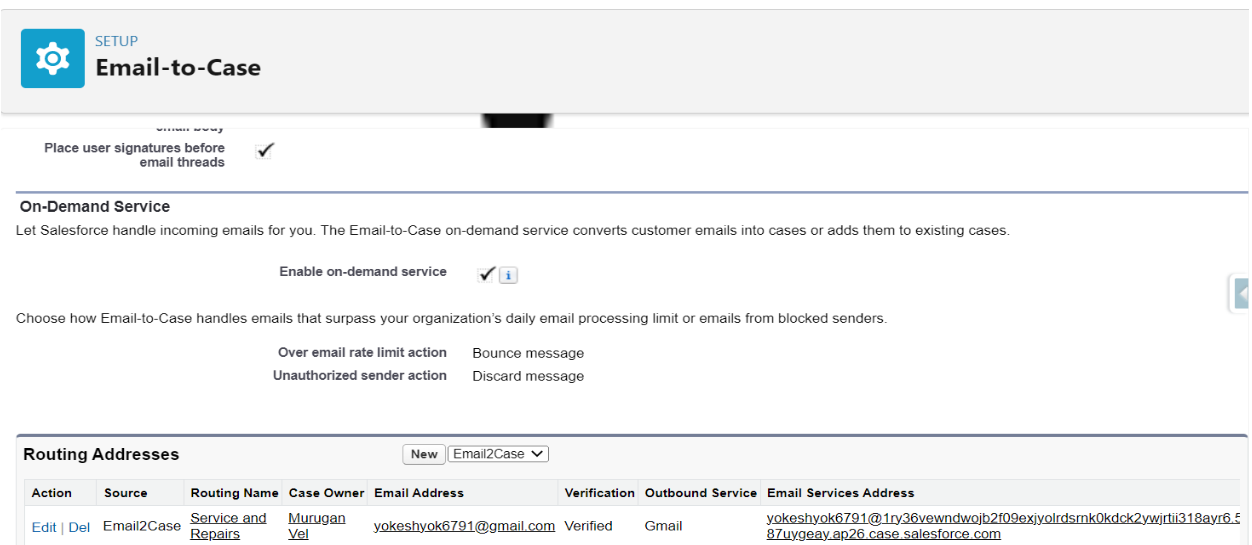
- Added the frequently used object tabs to the App.



Cases from other Sources:

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

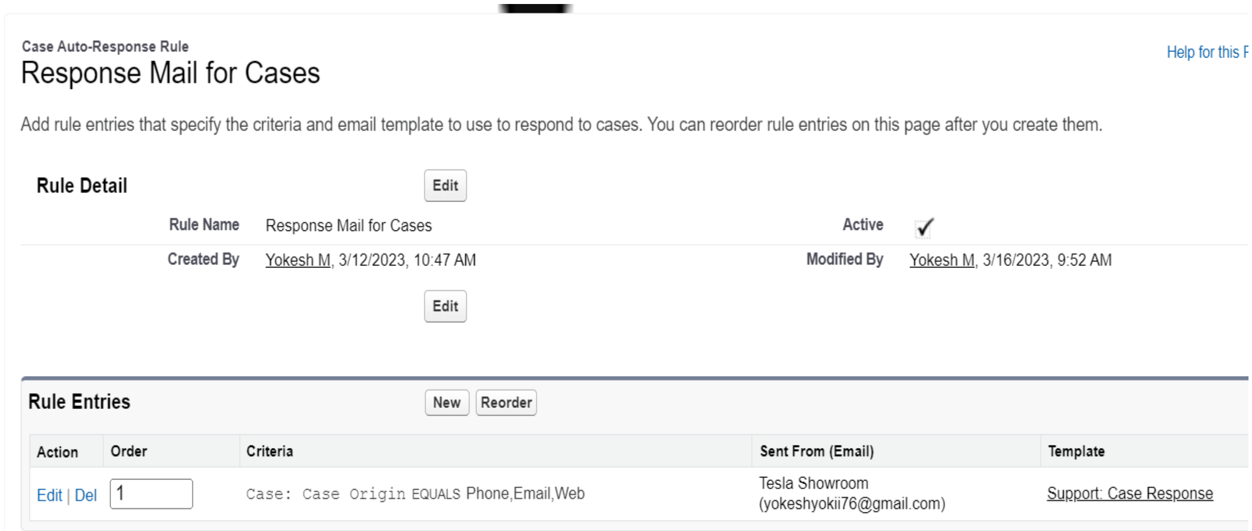
Now the Email which is received by the Service Reps are automatically created as Case record in the case object.



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

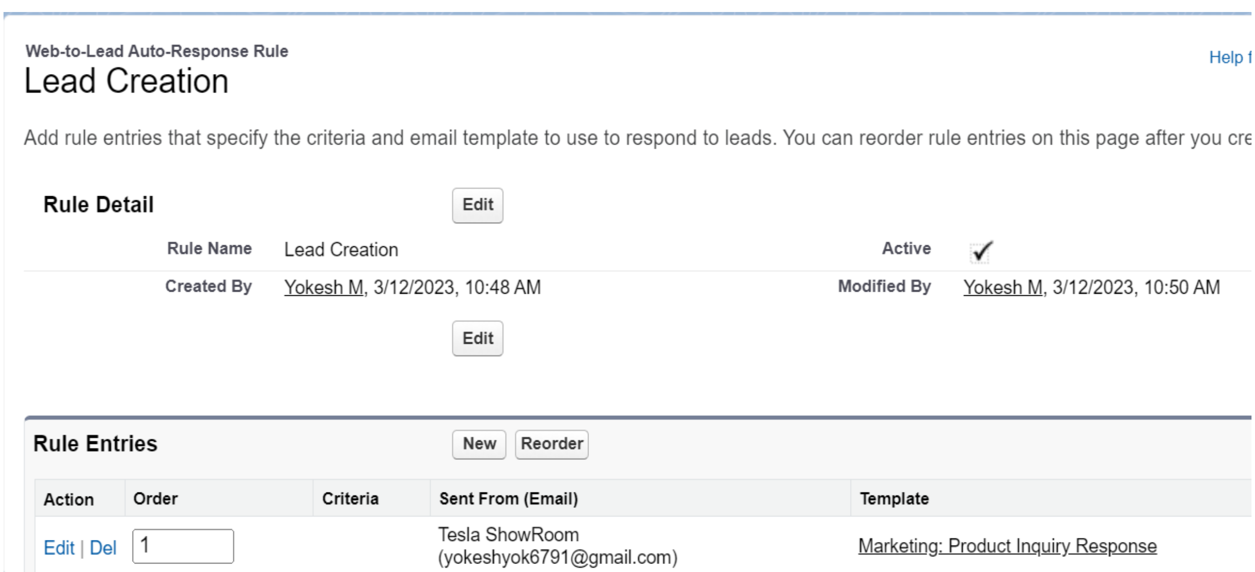
- Also Created a web to case Form So that customers can fix appointment for the Service through the website.

- 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.



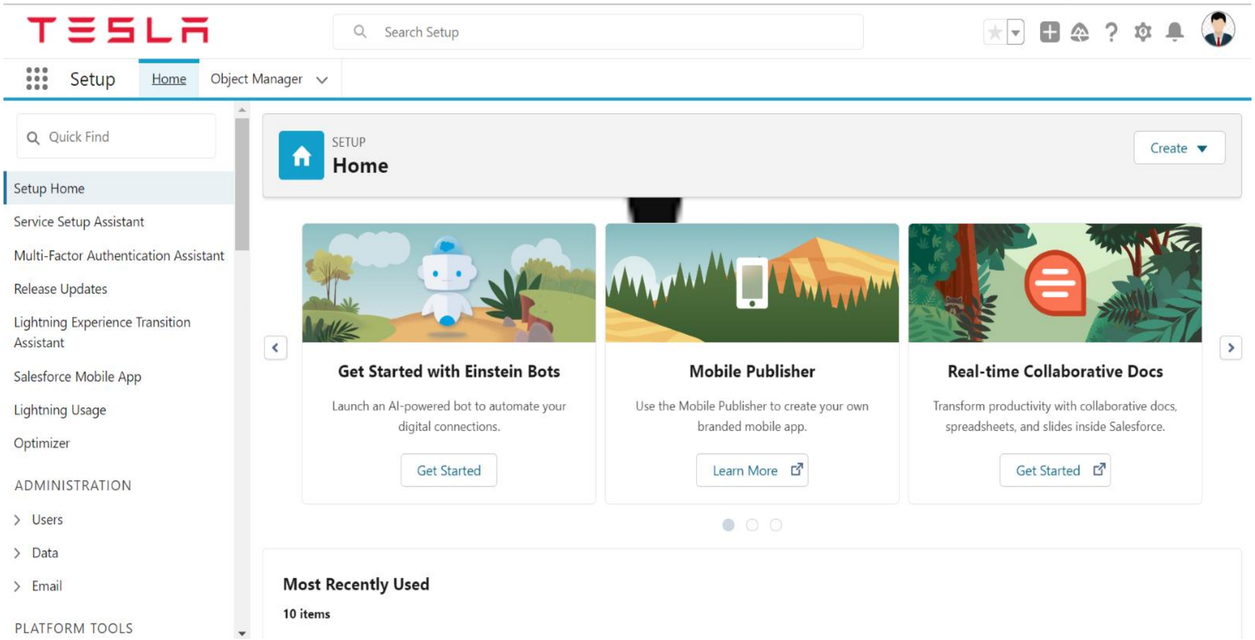
Lead generation from website:

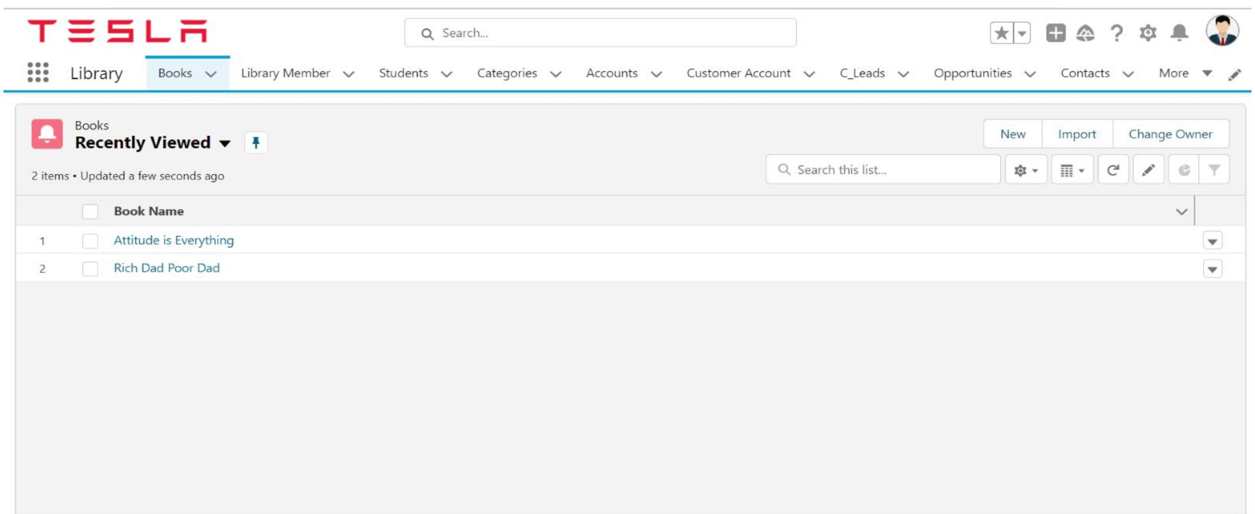
- Created a Web to Lead form to generate leads through web pages.
- Created a Lead assignment rule and activated it. The rule if the lead source is web and phone enquiry, the Lead records will be assigned to sales queue.
- Then created a Lead Auto response rule for the web to lead customers.



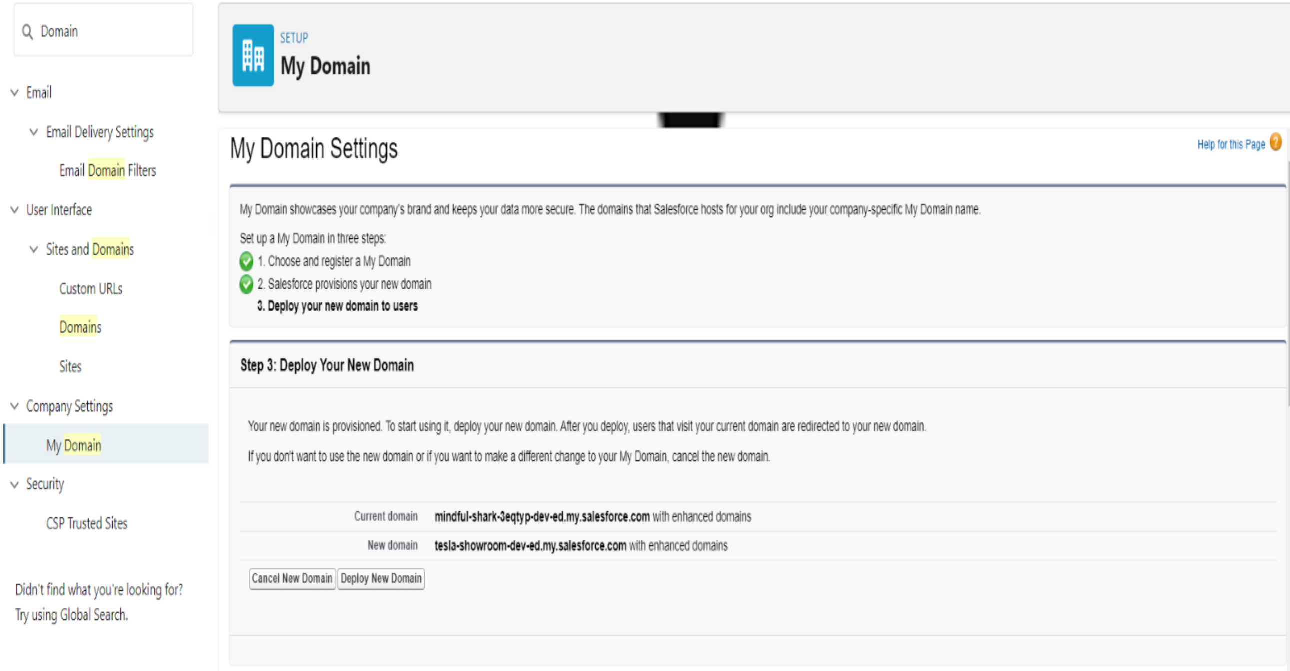
Branding in salesforce:

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

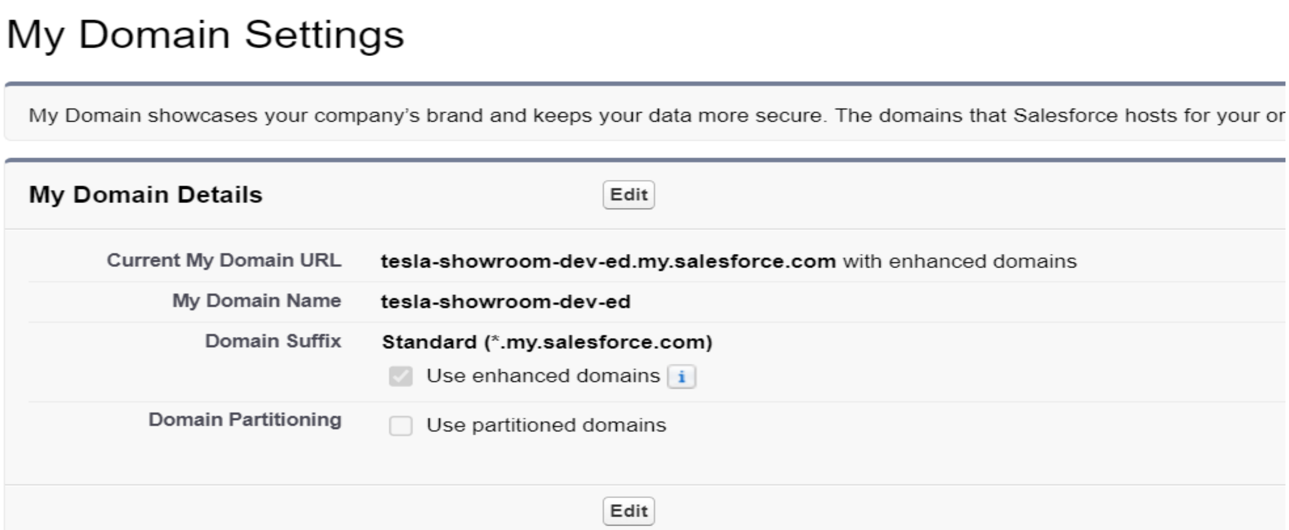




Domain Name Change:



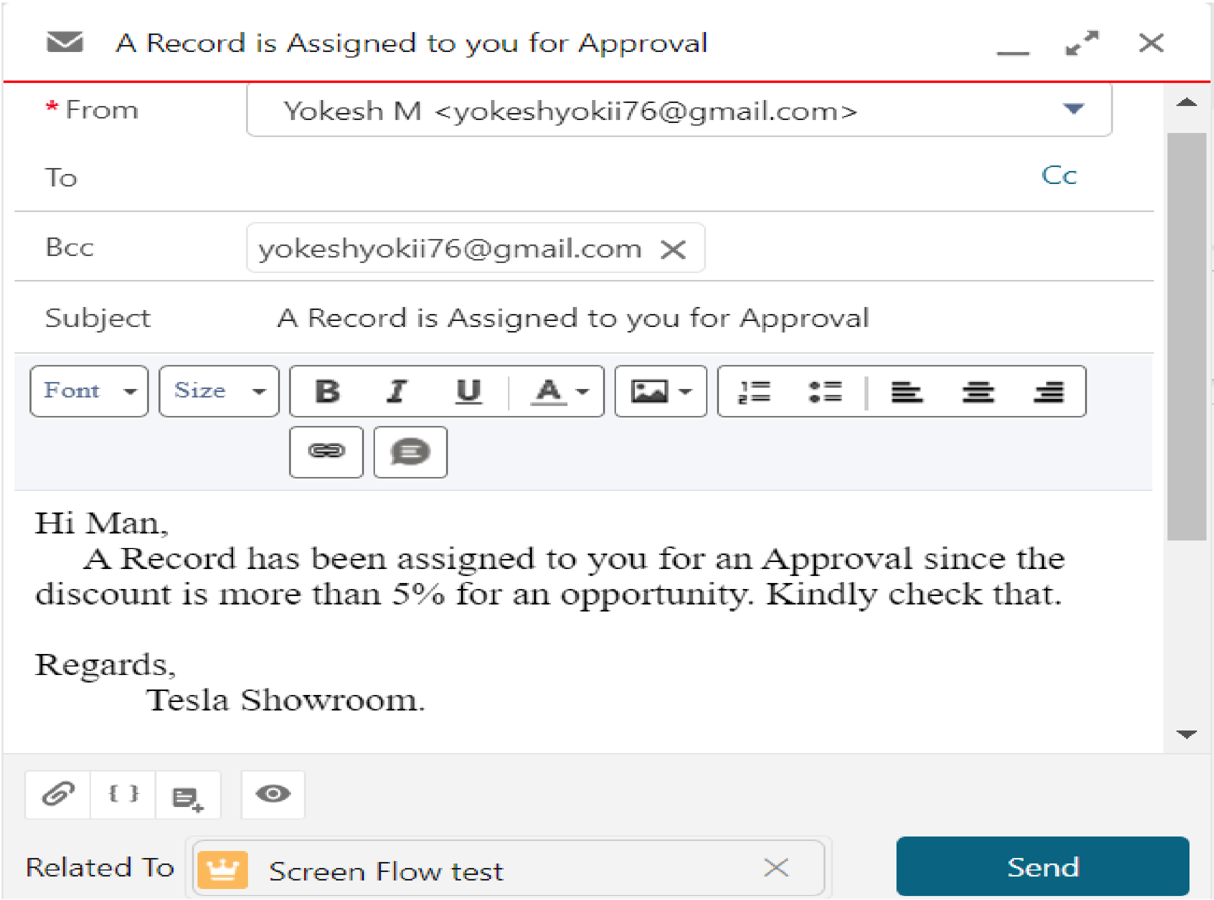
Current Domain Name & URL -->



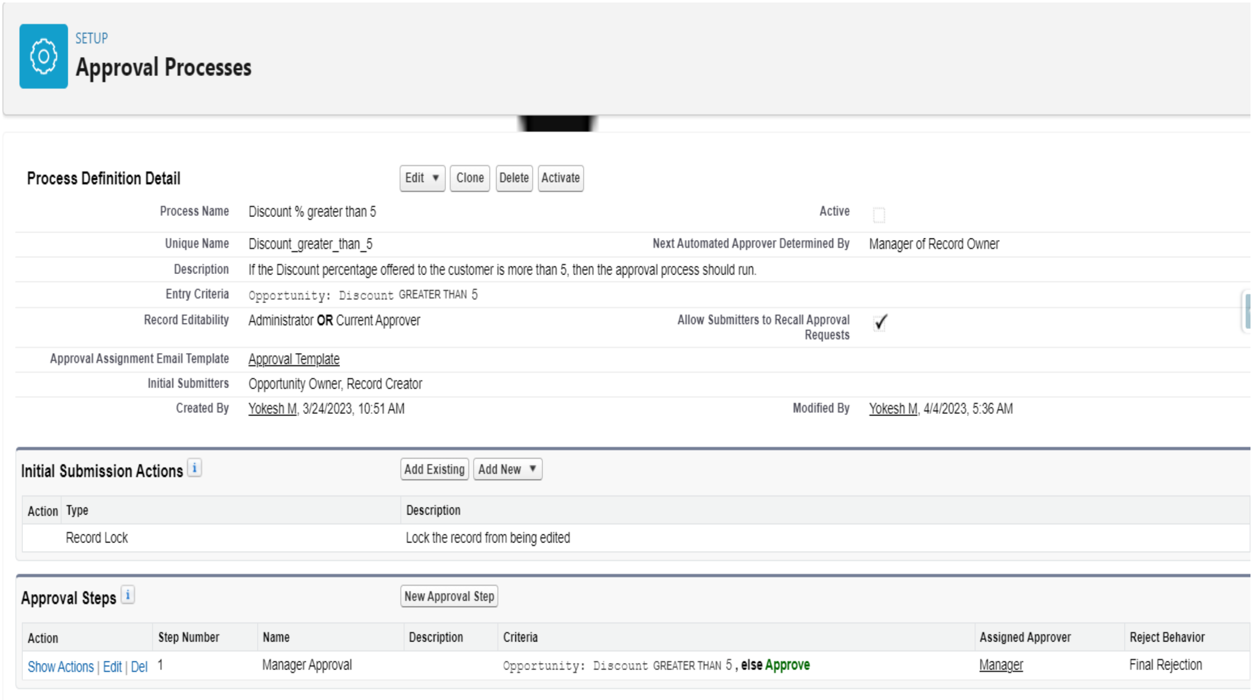
Automations:

- Approval process on the opportunity object

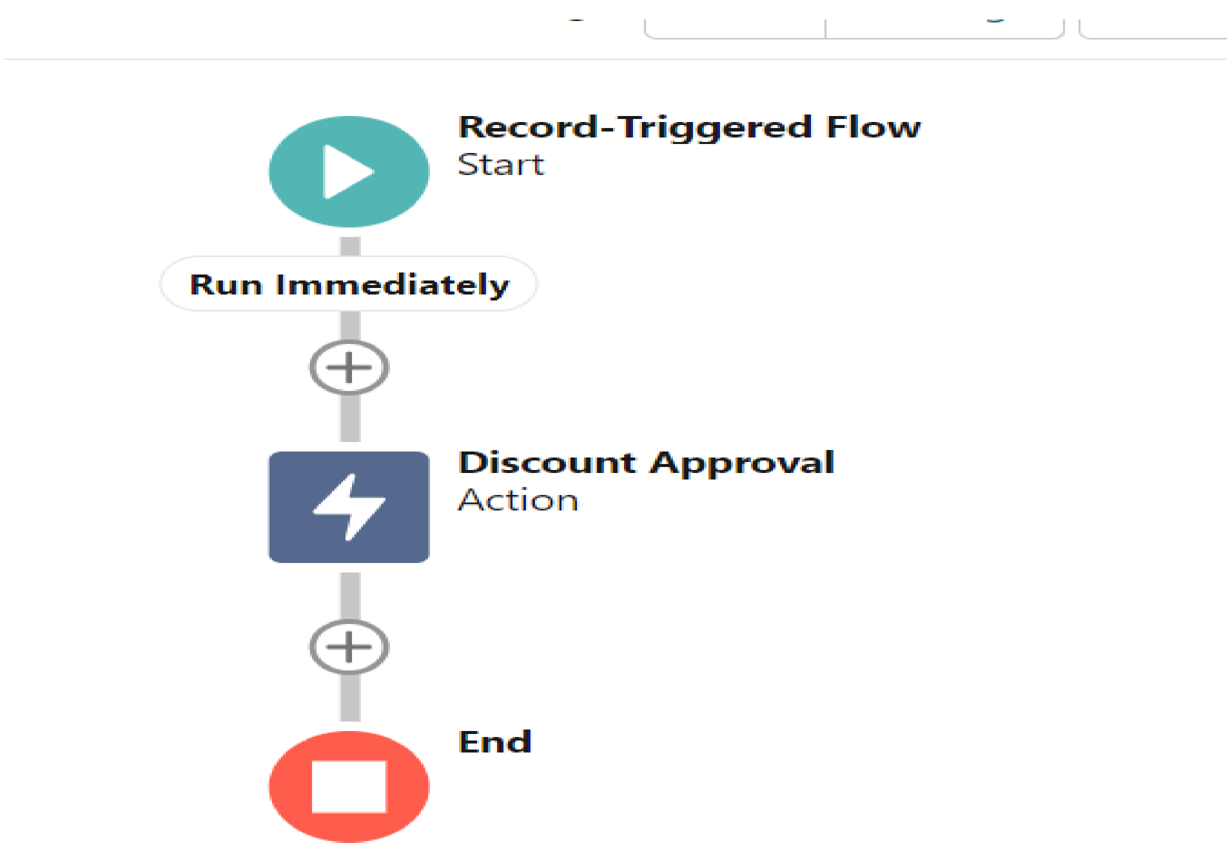
EMAIL TEMPLATE For the Approval process:

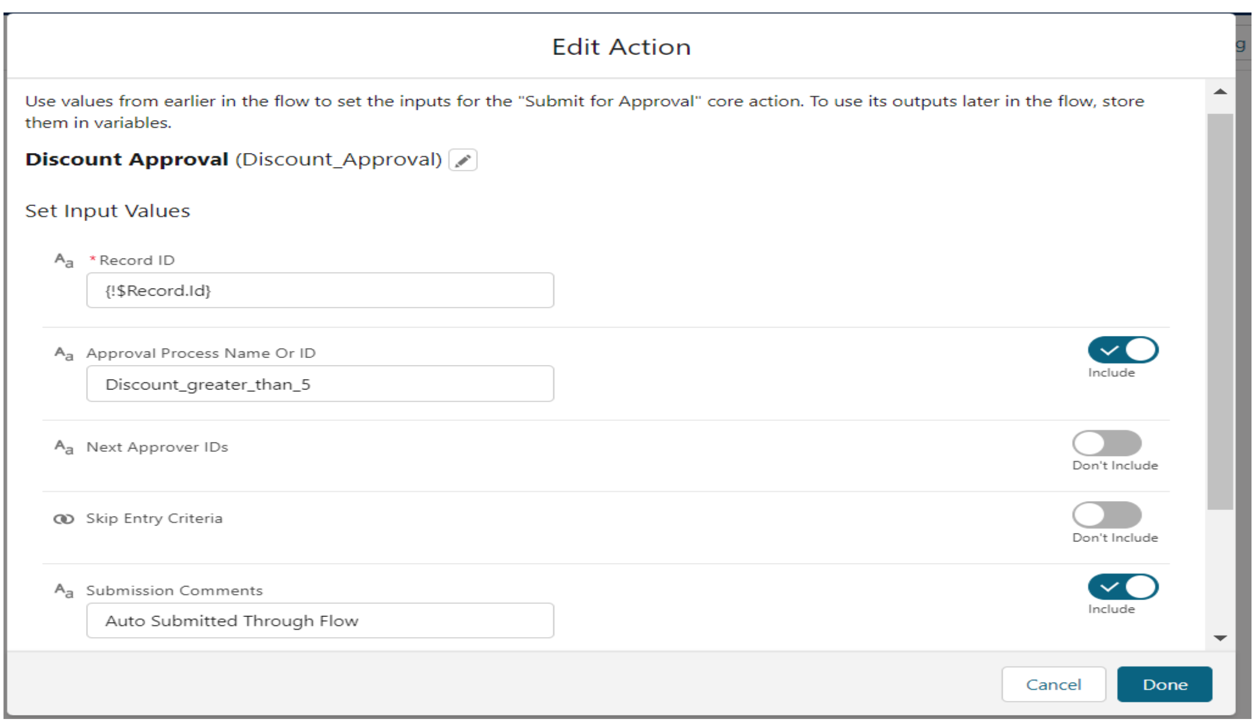


CRITERIA: If the Discount percentage (Formula field) in an Opportunity is more than 5% then the record will be sent for Approval to his Manager. If it is below 5% the record will be Auto- Approved.



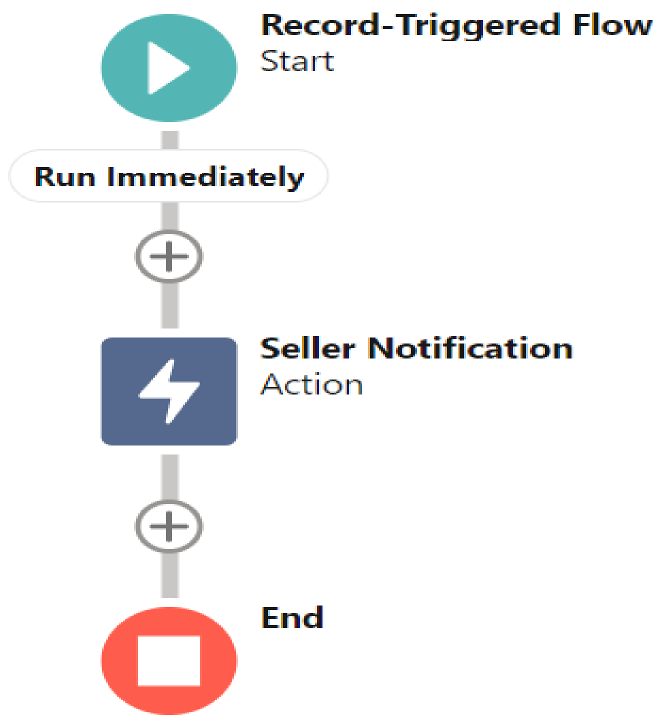
- Automated the Approval submission work Through Flow Builder.


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
* Record ID
{!$Record.Id}
Approval Process Name Or ID
Discount_greater_than_5
Include
Next Approver IDs
Don't Include
Skip Entry Criteria
Don't Include
Submission Comments
Auto Submitted Through Flow
Include
Cancel
Done

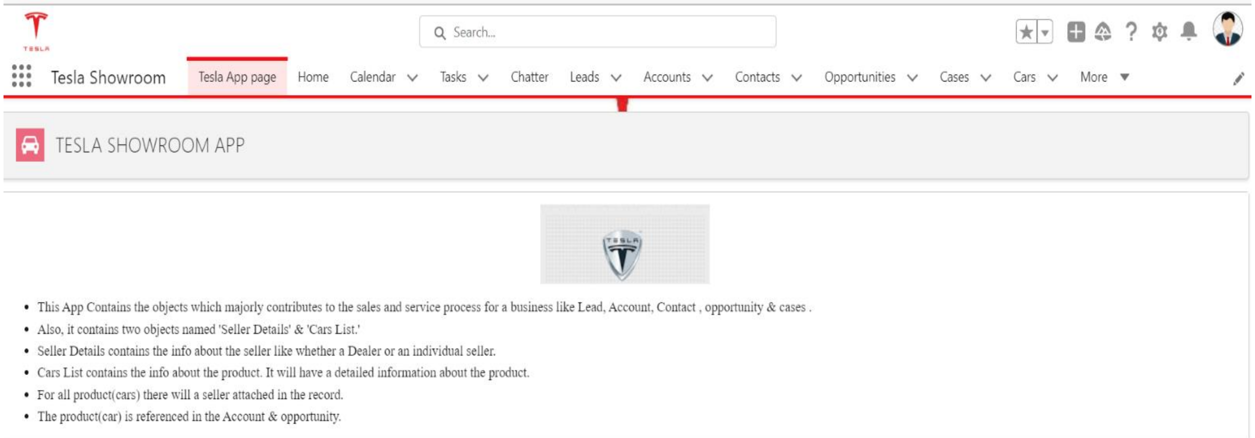
Reference: https://help.salesforce.com/s/articleView?id=000392569&type=1

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

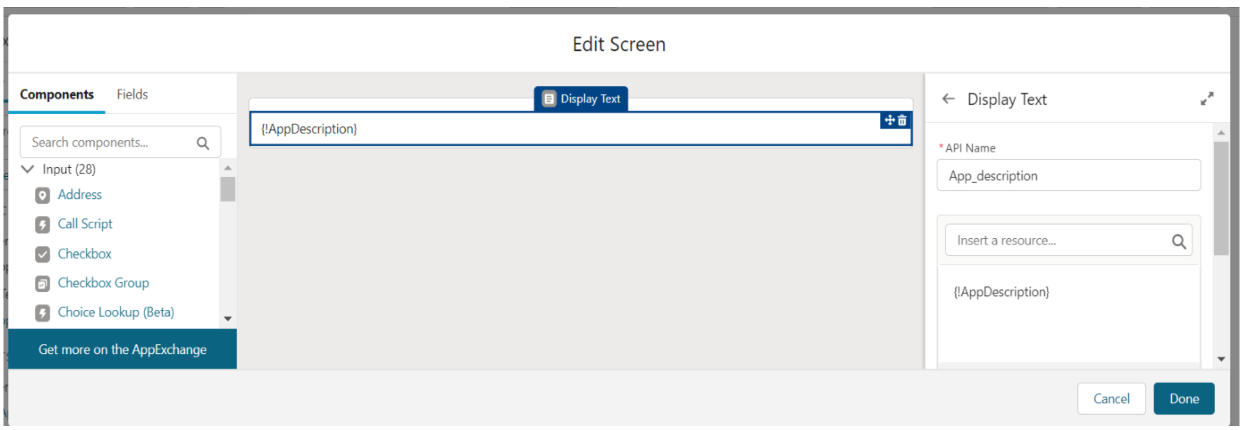


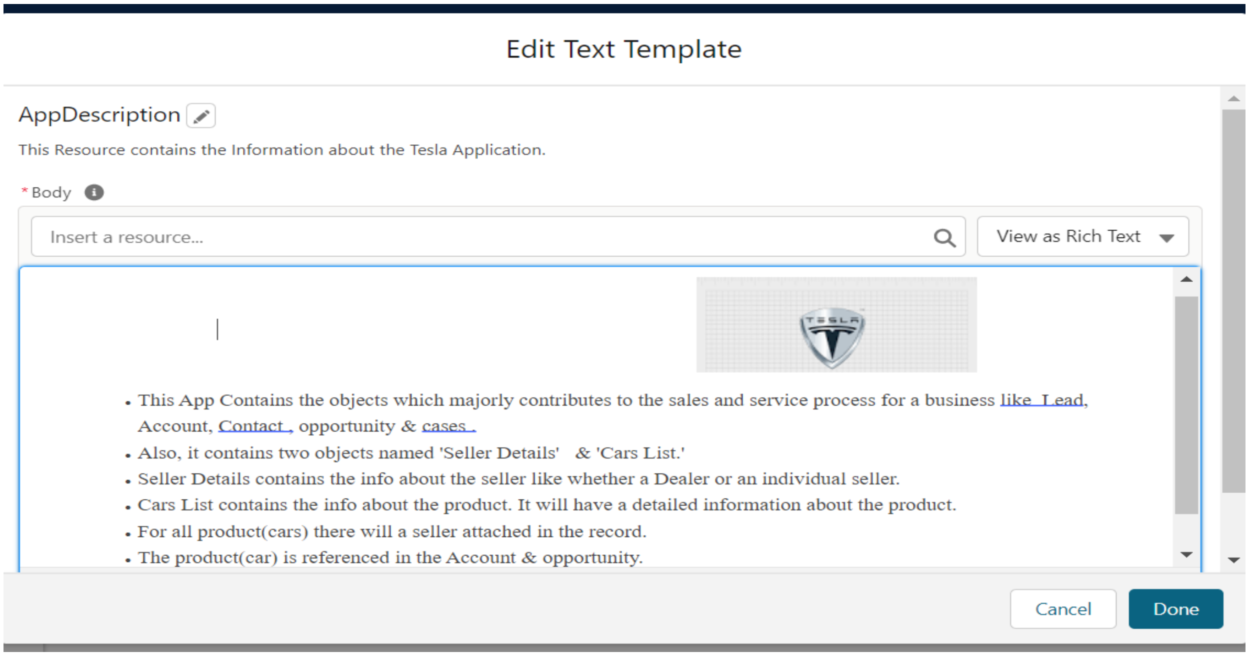
App Page for the Application:

App page for the showroom app using a screen flow.



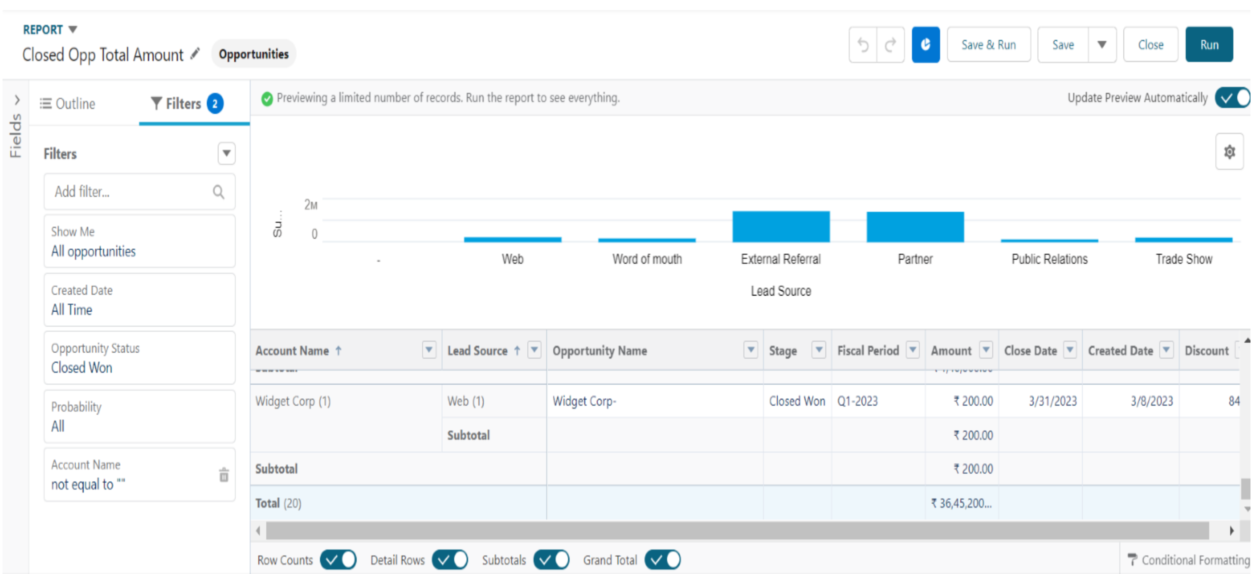
Mentioned the use of the App and described how the data is being stored in objects.



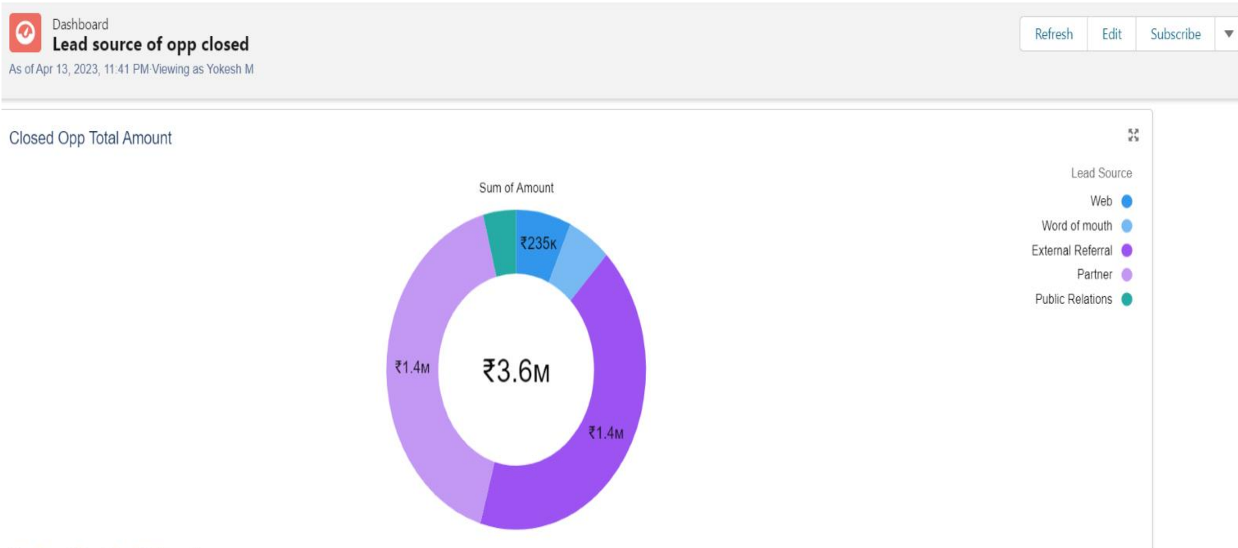


Finding the Total amount of sales:

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
Sum of Amount
₹235K
₹1.4M
₹3.6M
₹1.4M
Lead Source
Web
Word of mouth
External Referral
Partner
Public Relations