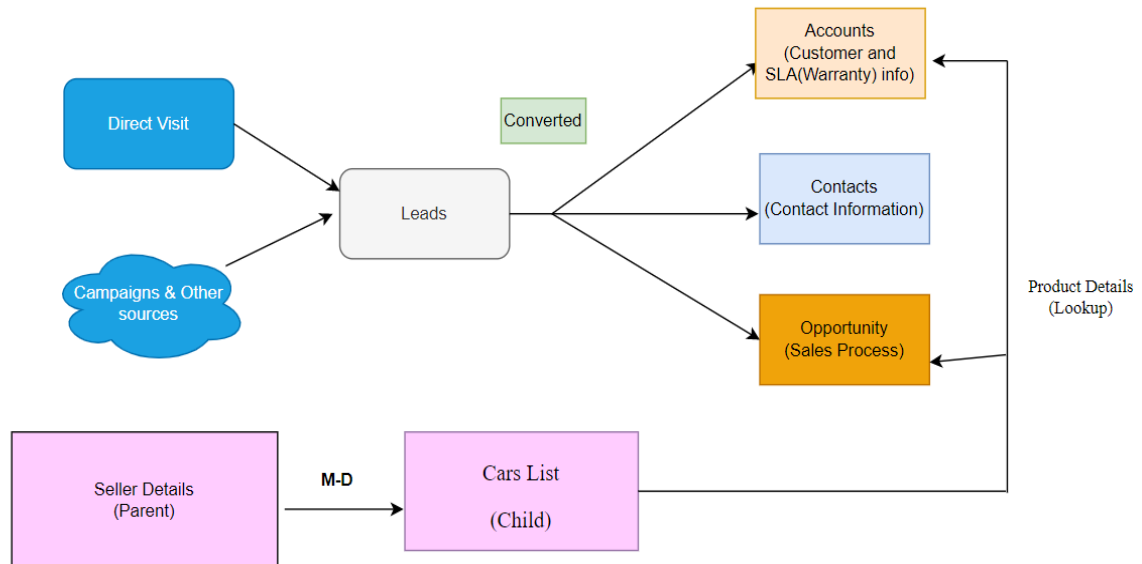
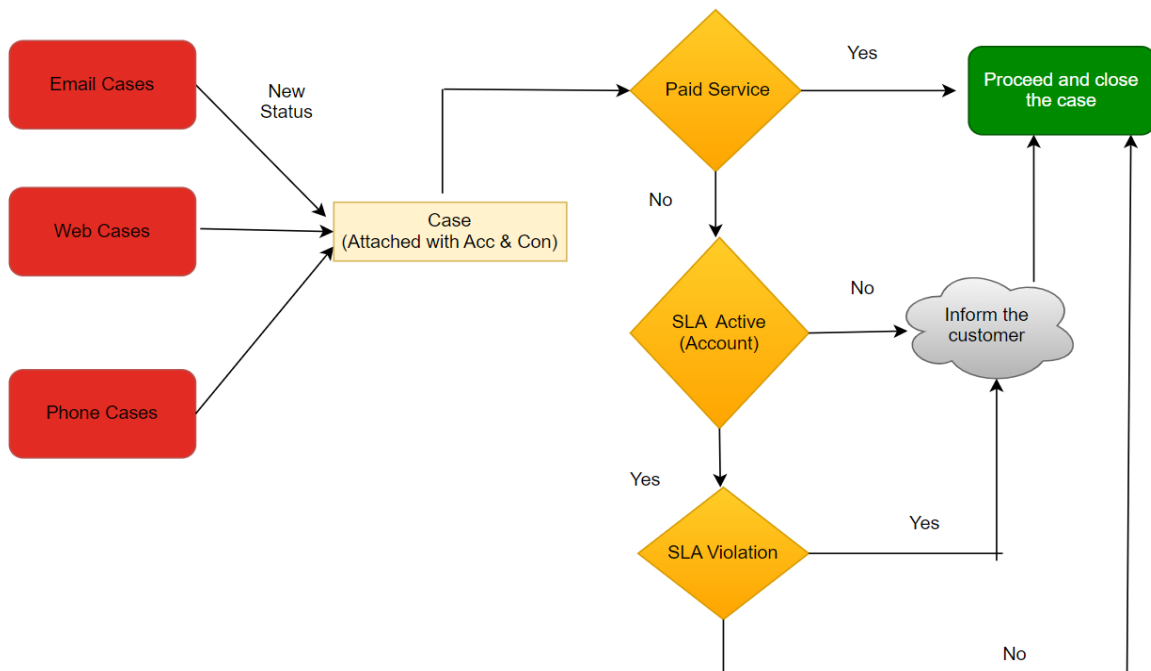


# TESLA CAR SHOWROOM

## SALES PROCESS:

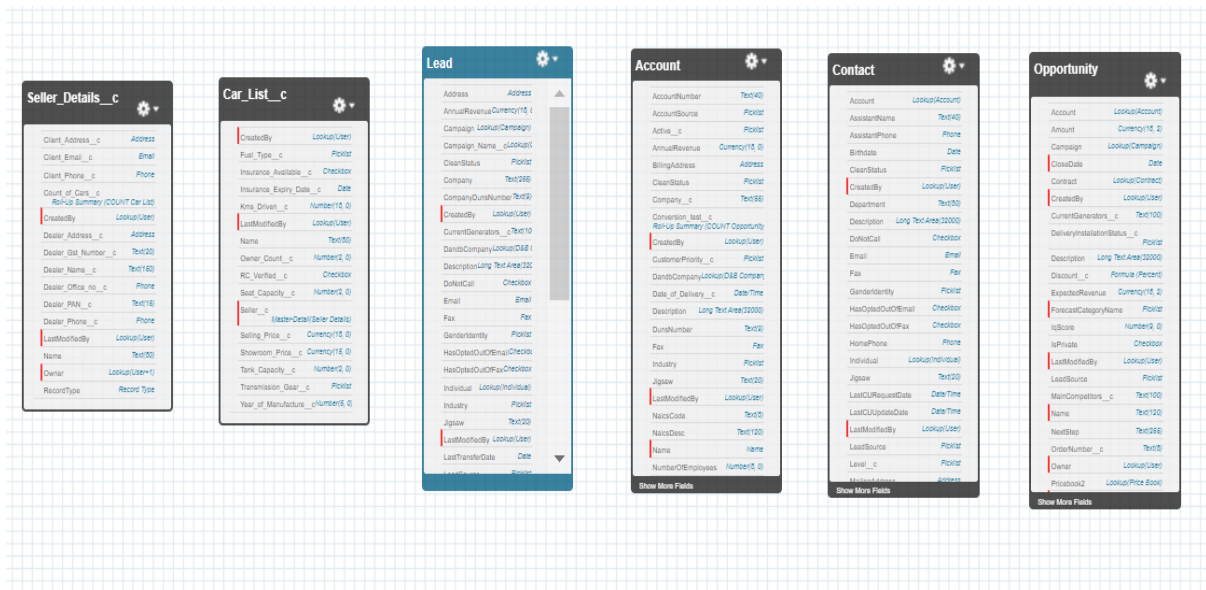


## SUPPORT PROCESS:



## 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-->

<i><b>Field Label</b></i>	<i><b>Datatype</b></i>	<i><b>Parent Object</b></i>	<i><b>Description</b></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 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-->

<i><b>Field Label</b></i>	<i><b>Datatype</b></i>	<i><b>Parent Object</b></i>	<i><b>Description</b></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:**

$$\frac{(\text{Product\_r.Selling\_Price\_c} - \text{Amount})}{\text{Product\_r.Selling\_Price\_c}}$$

Taking the Amount field in opportunity as the Exact amount done sales to the customer but the actual selling price is mentioned in the 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-->**

<i><b>Field Label</b></i>	<i><b>Datatype</b></i>	<i><b>Values</b></i>	<i><b>Description</b></i>	<i><b>Parent Object</b></i>
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:**

<i><b>Field Label</b></i>	<i><b>Datatype</b></i>	<i><b>Criteria</b></i>	<i><b>Description</b></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

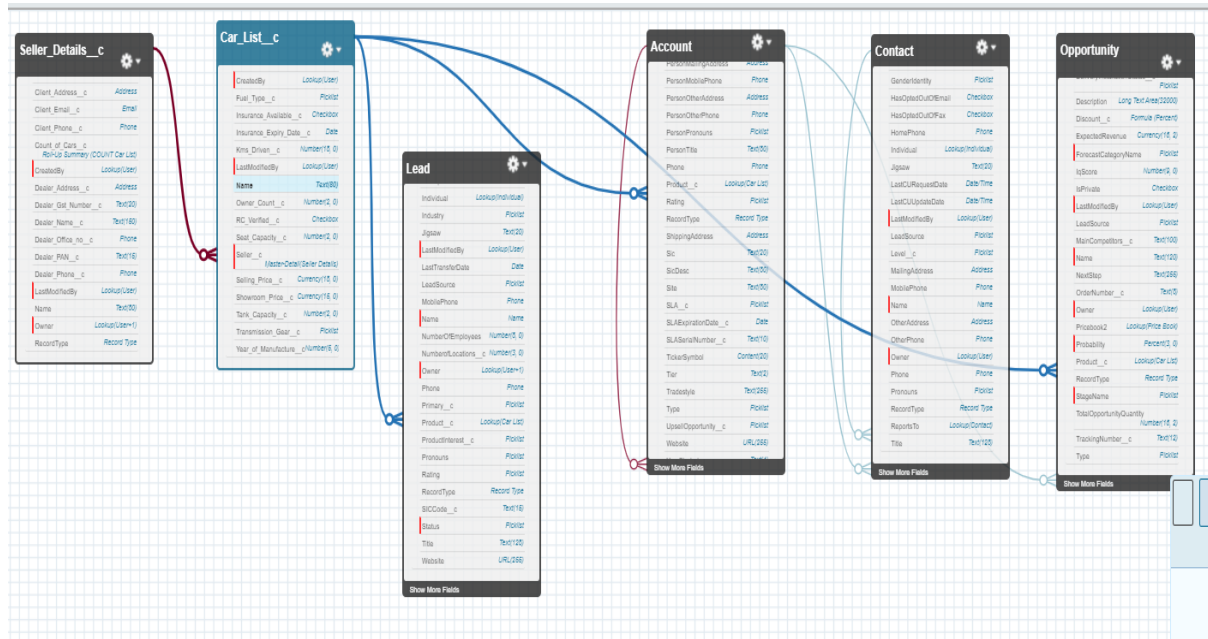
**Record types:**

Individual & Dealer.

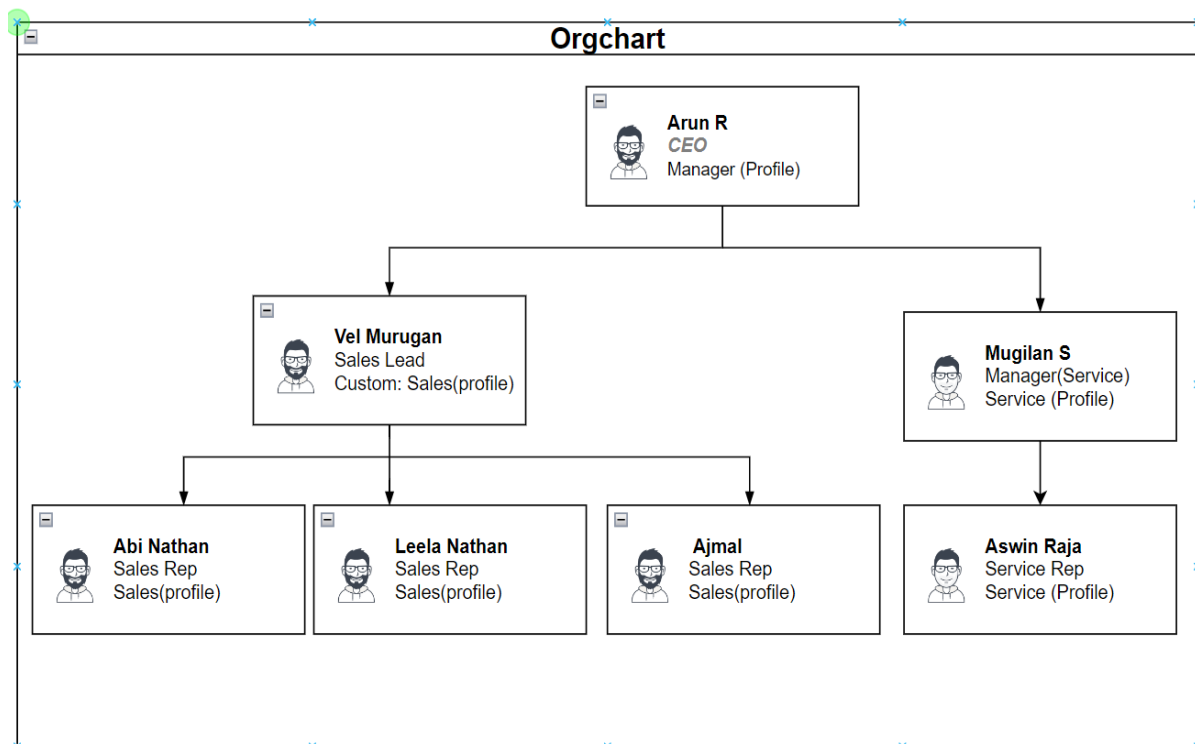
Differentiated by two diff page layouts with diff fields on it.

## 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: (For Security settings)



## App Creation:

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

The screenshot shows the Tesla Showroom App interface. The top navigation bar includes the Tesla logo, a search bar, and various utility icons. The main content area is divided into three sections: 'Key Deals - Recent Opportunities' on the left, 'Today's Tasks' in the top right, and 'Today's Events' in the bottom right. The 'Key Deals' section lists several deals with details like company names, dates, and amounts. The 'Today's Tasks' section shows a message about no tasks for the day. The 'Today's Events' section shows a message about being free and clear. A 'Quarterly Performance' section is visible at the bottom left.

## 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 screenshot shows the Salesforce Email-to-Case setup page. The page has a header with the 'Email-to-Case' title and a 'SETUP' button. Below the header, there are several sections: 'On-Demand Service' with a description and an 'Enable on-demand service' checkbox; 'Choose how Email-to-Case handles emails that surpass your organization's daily email processing limit or emails from blocked senders.' with options for 'Over email rate limit action' and 'Unauthorized sender action'; and 'Routing Addresses' which includes a table of email addresses and their verification status.

Action	Source	Routing Name	Case Owner	Email Address	Verification	Outbound Service	Email Services Address
<a href="#">Edit</a>   <a href="#">Del</a>	Email2Case	Service and Repairs	Murugan Vel	yokeshyok6791@gmail.com	Verified	Gmail	yokeshyok6791@1ry36vewndwojb2f09exjvoirdsmk0kdcck2ywjrtli318ayr6.587uygeay.ap26.case.salesforce.com

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
<a href="#">Edit</a>   <a href="#">Del</a>	<input type="text" value="1"/>	Case: Case Origin EQUALS Phone,Email,Web	Tesla Showroom (yokeshyokii76@gmail.com)	<a href="#">Support: Case Response</a>

## 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 1

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

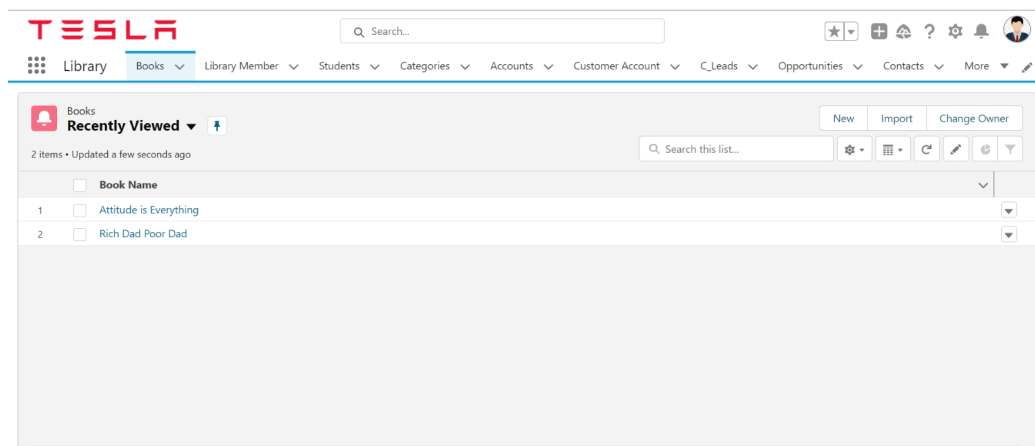
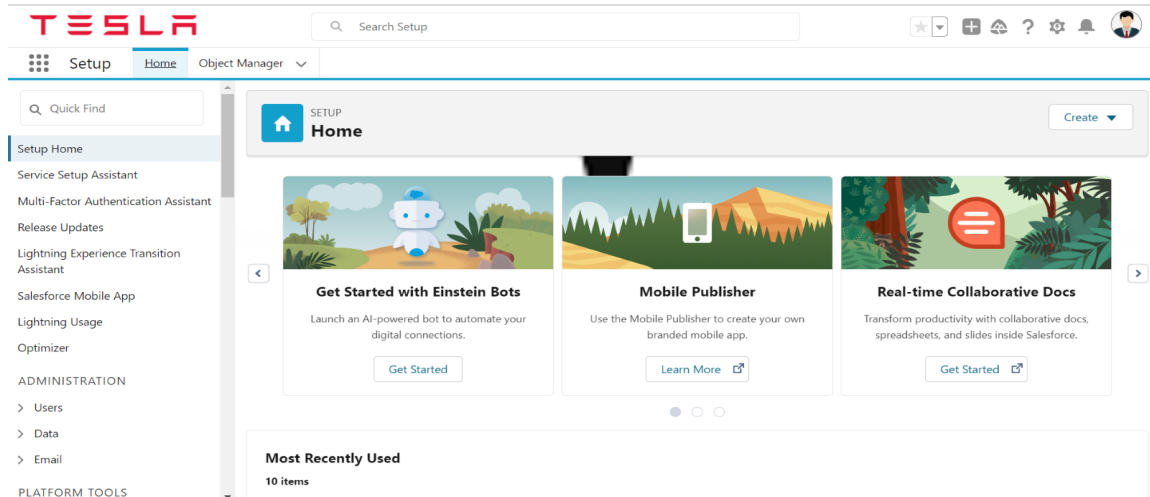
New Reorder

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



## 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:

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

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

SETUP

My Domain

My Domain Settings

Help for this Page

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 new 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-3eqtp-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

## Current Domain Name & URL -->

### My Domain Settings

My Domain showcases your company's brand and keeps your data more secure. The domains that Salesforce hosts for your or

My Domain Details

Edit

Current My Domain URL

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

My Domain Name

tesla-showroom-dev-ed

Domain Suffix

Standard (\*.my.salesforce.com)  
☒ Use enhanced domains ⓘ

Domain Partitioning


☐ Use partitioned domains

Edit

## Automations:

- Approval process on the opportunity object

EMAIL TEMPLATE For the Approval process:

 A Record is Assigned to you for Approval

\* From

Yokesh M <yokeshyokii76@gmail.com>

To

Bcc

yokeshyokii76@gmail.com ✕

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 ✕

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.

 **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 <b>OR</b> Current Approver	Allow Submitters to Recall Approval Requests	<input checked="" type="checkbox"/>
Approval Assignment Email Template	<a href="#">Approval Template</a>		
Initial Submitters	Opportunity Owner, Record Creator		
Created By	<a href="#">Yokesh M.</a> 3/24/2023, 10:51 AM		Modified By <a href="#">Yokesh M.</a> 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
<a href="#">Show Actions</a>   <a href="#">Edit</a>   <a href="#">Del</a>	1	Manager Approval		Opportunity: Discount GREATER THAN 5 , <b>else Approve</b>	<a href="#">Manager</a>	Final Rejection

- Automated the Approval submission work Through Flow Builder.



9

### 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)

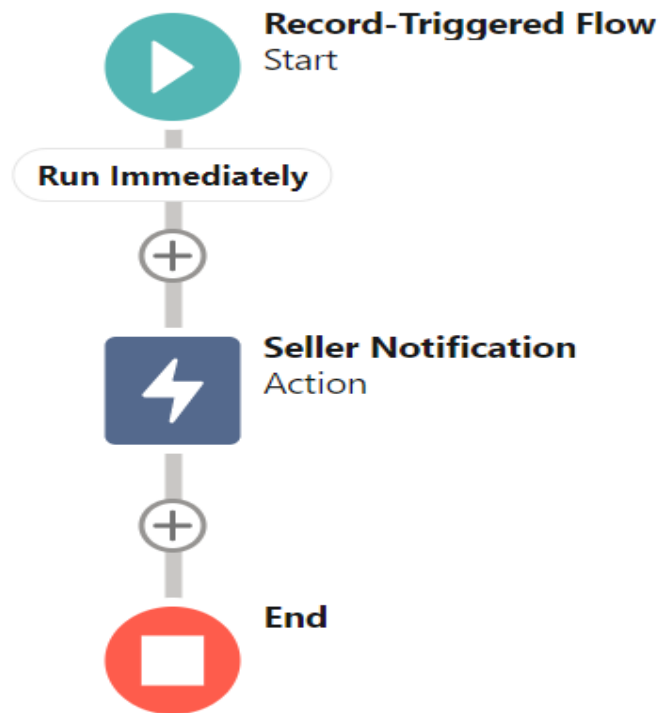
Set Input Values

A <sub>a</sub> * Record ID	<input type="text" value="{!\$Record.Id}"/>	
A <sub>a</sub> Approval Process Name Or ID	<input type="text" value="Discount_greater_than_5"/>	<input checked="" type="checkbox"/> Include
A <sub>a</sub> Next Approver IDs		<input type="checkbox"/> Don't Include
Skip Entry Criteria		<input type="checkbox"/> Don't Include
A <sub>a</sub> Submission Comments	<input type="text" value="Auto Submitted Through Flow"/>	<input checked="" type="checkbox"/> 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.



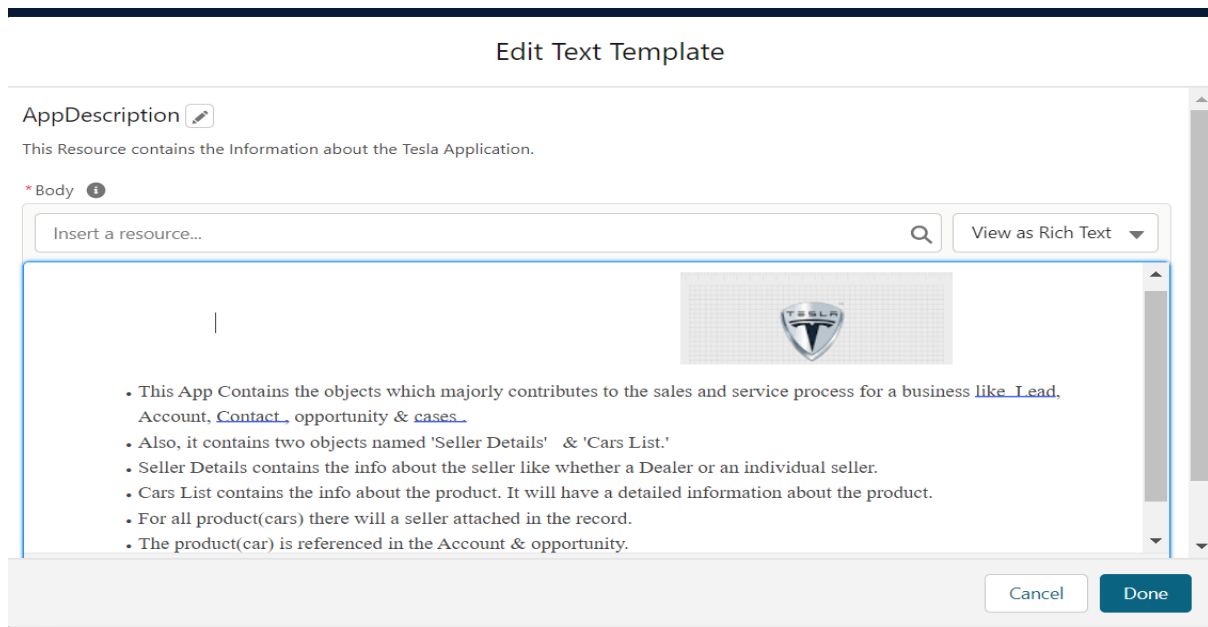
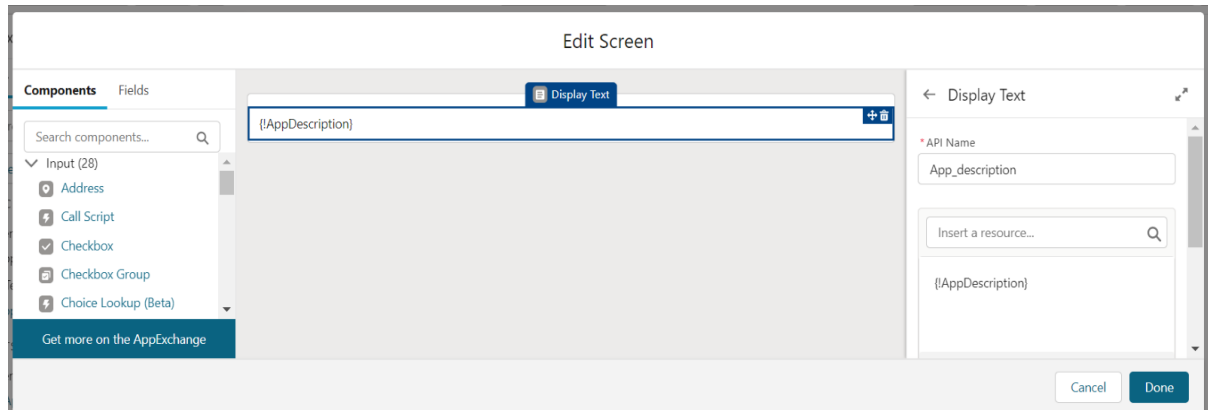
## App Page for the Application:

App page for the showroom app using a screen flow.

The screenshot shows the 'Tesla Showroom' application page. The top navigation bar includes the Tesla logo, a search bar, and various icons. The main navigation menu lists 'Tesla Showroom', 'Tesla App page' (highlighted), 'Home', 'Calendar', 'Tasks', 'Chatter', 'Leads', 'Accounts', 'Contacts', 'Opportunities', 'Cases', 'Cars', and 'More'. Below the navigation bar, the page title 'TESLA SHOWROOM APP' is displayed. The main content area features the Tesla logo and a list of bullet points describing the app's functionality:

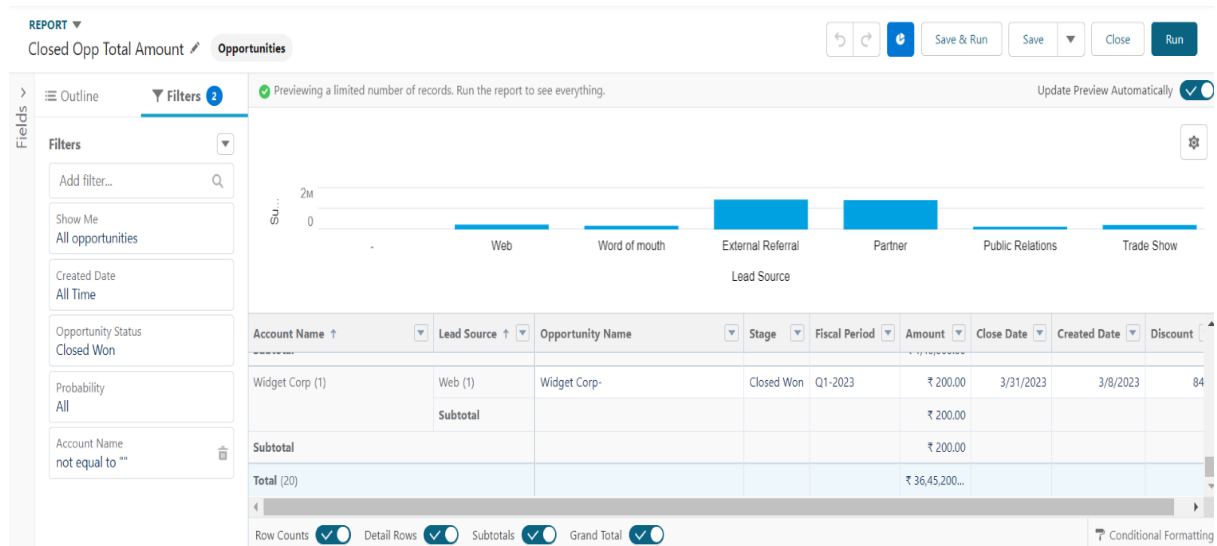
- This App Contains the objects which majorly contributes to the sales and service process for a business like Lead, Account, Contact , opportunity & cases .
- Also, it contains two objects named 'Seller Details' & 'Cars List.'
- Seller Details contains the info about the seller like whether a Dealer 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.

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.

