

Project Title

AUTOMOBILE SALES

Team leader NM ID:

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Team Members NM ID:

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5A4E3D096CC8B26BD0148C3ADCFB1208

76E75E7CB263B7183B54AC6E961CE533

AUTOMOBILE SALES

PROJECT REVIEW

The Salesforce integration streamlined sales processes and improved customer management. Challenges like data migration and training were resolved with planning. The project resulted in faster sales, better customer service, and enhanced efficiency.

OBJECTIVES

BUSINESS GOALS:

- Increase sales and revenue through efficient processes.
- Improve customer satisfaction and retention.
- Reduce operational costs with automation.
- Strengthen decision-making with data-driven insights.
- Build a scalable and adaptable sales framework.
- Enhance market competitiveness through digital transformation.

SPECIFIC OUTCOMES:

Centralized Management System: A user-friendly platform to manage appointments, services, customer details, and inventory seamlessly in one place, ensuring efficiency and organization.

Automated Notifications: Automated reminders and status updates keep customers informed about service progress and completion, enhancing communication and satisfaction.

Salesforce Key Features and Concepts Utilized: Integration of CRM tools for effective customer management, automation for timely reminders and updates, and analytics for performance tracking on a secure, cloud-based platform.

\Salesforce Mobile App

On-the-Go Management: Enables managers and staff to monitor operations, access records, and make updates anytime, anywhere.

Role-Based Access Control: Maintains data privacy by granting access only to authorized personnel.

Audit Trail: Tracks changes in records to ensure accountability and compliance.

Detailed Steps to Solution Design

Define Business Needs: Identify key sales processes like lead management, inventory tracking, and customer service.

Customize Salesforce: Tailor Salesforce objects and fields to suit automobile sales needs. Set up workflows and lead assignment rules.

Data Migration: Transfer customer and vehicle data from existing systems into Salesforce.

Set Up Mobile Access: Enable the Salesforce mobile app for sales teams to manage operations on-the-go.

Automate Processes: Use automation tools to streamline tasks like reminders and follow-ups.

Create Reports: Set up dashboards and reports to track sales, inventory, and customer interactions.

Train Users: Provide training for staff on using Salesforce effectively.

Test and Launch: Test the system, fix issues, and launch Salesforce for use.

Support and Improve: Monitor system performance, gather feedback, and make improvements as needed.

Testing and Validation

Data Integrity Testing: Ensure accurate transfer of customer, vehicle, and sales data to Salesforce without errors.

Workflow Validation: Test automated processes like lead assignments, reminders, and follow-ups to ensure they function properly.

User Role Testing: Verify that role-based access controls are correctly set, ensuring proper data access for each user.

Mobile App Functionality: Test the Salesforce mobile app for smooth access to customer data, lead updates, and inventory management.

User Acceptance Testing (UAT): Involve key users to test common tasks and gather feedback to ensure the system meets business needs.

Key Scenarios Addressed by Salesforce in the Implementation Project

Lead Management: Automates lead capture, tracking, and assignment to improve conversion rates.

Customer Data Management: Centralizes customer information for personalized service and efficient support.

Inventory Tracking: Provides real-time vehicle inventory management across multiple locations.

Sales Performance Monitoring: Offers dashboards and reports to track sales activities and KPIs.

Customer Service and Support: Automates service reminders, appointments, and post-sale support for better customer satisfaction.

Create a custom object from a spreadsheet

Define object and fields

Choose the data source, map fields and their types, and import field data.

CSV File Details

Encoding Format ¹

Unicode (UTF8)

Values Separated By

Comma

Field Label Source

☐ Enter manually
☒ Detect from row

* Field Labels Row

1

Import 0 rows of Data? ¹

☐ No, skip import
☒ Yes, import data

Record Name Field ¹

Let Salesforce Create a Default F


Fields 5 of 5 to import

☐ Hide mapped fields

IMPORT FILE FIELD NAME		SALESFORCE FIELD NAME	SALESFORCE FIELD TYPE	ADD TO LAYOUTS ¹	FIELD PREVIEW
✓ Invoice ID	×	Invoice ID	Text	✓	
✓ Total Price	×	Total Price	Currency	✓	
✓ Quantity	×	Quantity	Integer	✓	
✓ Unit Price	×	Unit Price	Integer	✓	
✓ Purchase Date	×	Purchase Date	Date	✓	

Back

Next


SETUP

Lightning Experience App Manager

New Lightning App
New Connected App

24 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type

⚙️

	App Name ↑	Developer Name	Description	Last Modified Date	App ...	Visi...	
1	All Tabs	AllTabSet		13/11/2024, 12:15 pm	Classic		⌵
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	13/11/2024, 12:15 pm	Classic	✓	⌵
3	App Launcher	AppLauncher	App Launcher tabs	13/11/2024, 12:15 pm	Classic	✓	⌵
4	Automation	FlowsApp	Automate business processes and repetitive tasks.	13/11/2024, 12:22 pm	Lightning	✓	⌵
5	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	13/11/2024, 12:18 pm	Lightning	✓	⌵
6	Business Rules Engine	ExpressionSetConsole	Create and maintain business rules that perform complex lookups and calculations.	13/11/2024, 12:15 pm	Lightning	✓	⌵
7	Community	Community	Salesforce CRM Communities	13/11/2024, 12:15 pm	Classic	✓	⌵
8	Content	Content	Salesforce CRM Content	13/11/2024, 12:15 pm	Classic	✓	⌵
9	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	13/11/2024, 12:15 pm	Lightning	✓	⌵
10	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	13/11/2024, 12:15 pm	Lightning	✓	⌵
11	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	13/11/2024, 12:15 pm	Lightning	✓	⌵
12	Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	13/11/2024, 12:15 pm	Classic	✓	⌵
13	Platform	Platform	The fundamental Lightning Platform	13/11/2024, 12:15 pm	Classic		⌵
14	Queue Management	QueueManagement	Create and manage queues for your business.	13/11/2024, 12:15 pm	Lightning	✓	⌵

Microsoft Windows [Version 10.0.22631.4460]
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C:\Users\spuru>sf dx
The Salesforce CLI

VERSION
@salesforce/cli/2.67.7 win32-x64 node-v22.10.0


USAGE
\$ sf [COMMAND]

TOPICS

alias	Use the alias commands to manage your aliases.
analytics	Work with analytics assets.
apex	Use the apex commands to create Apex classes, execute anonymous blocks, view your logs, run Apex tests, and view Apex test results.
api	Commands to interact with API calls.
cmdt	Generate a field for a custom metadata type based on the provided field type.
community	Create an Experience Cloud site using a template.
config	Commands to configure Salesforce CLI.
data	Manage records in your org.
deploy	Deploy a Salesforce Function to an org from your local project.
dev	Audit messages in a plugin's messages directory to locate unused messages and missing messages that have references in source code.
env	Add a Heroku user as a collaborator on this Functions account, allowing them to attach Heroku add-ons to compute environments.
force	Legacy commands for backward compatibility.
generate	Create a Salesforce Function with basic scaffolding specific to a given language.
info	Access Salesforce CLI information from the command line.
lightning	Work with Lightning Web and Aura components.
login	Log in to Salesforce Functions.
logout	Log out of your Salesforce Functions account.
org	Commands to create and manage orgs and scratch org users.
package	Commands to develop and install unlocked packages and managed 2GP packages.
package1	Commands to develop first-generation managed and unmanaged packages.
plugins	List installed plugins
project	Work with projects, such as deploy and retrieve metadata.
run	Send a cloudevent to a function.
scanner	Add custom rules to Salesforce Code Analyzer's registry to run them along with the built-in rules.
schema	Generate metadata files.

 Dashboard

Automobile Sales

 Last refreshed 4 days ago. Refresh this dashboard to see the latest data.

Refresh

Edit

Subscribe

As of 20-Nov-2024, 3:40 pm Viewing as ragulraja r

New Opportunities Report

O...	Opp...	Account Name	Opportunity Name	Stage
-	ragulraja r	Dickenson plc	Dickenson Mobile Generators	Qualificati
-	ragulraja r	United Oil & Gas Corp.	United Oil Office Portable Generators	Negotiation
-	ragulraja r	Express Logistics and Transport	Express Logistics Standby Generator	Closed Wc
-	ragulraja r	GenePoint	GenePoint Standby Generator	Closed Wc
-	ragulraja r	Grand Hotels &	Grand Hotels Kitchen Generator	Id Decisio

View Report (New Opportunities Report)



Conclusion :

The Salesforce implementation for automobile sales successfully streamlined operations, improved customer management, and enhanced sales performance. By automating key processes, providing real-time insights, and centralizing data, it enabled teams to work more efficiently and deliver personalized customer experiences. This project demonstrated how leveraging Salesforce's powerful tools can drive business growth, improve customer satisfaction, and support long-term scalability in the competitive automobile industry.