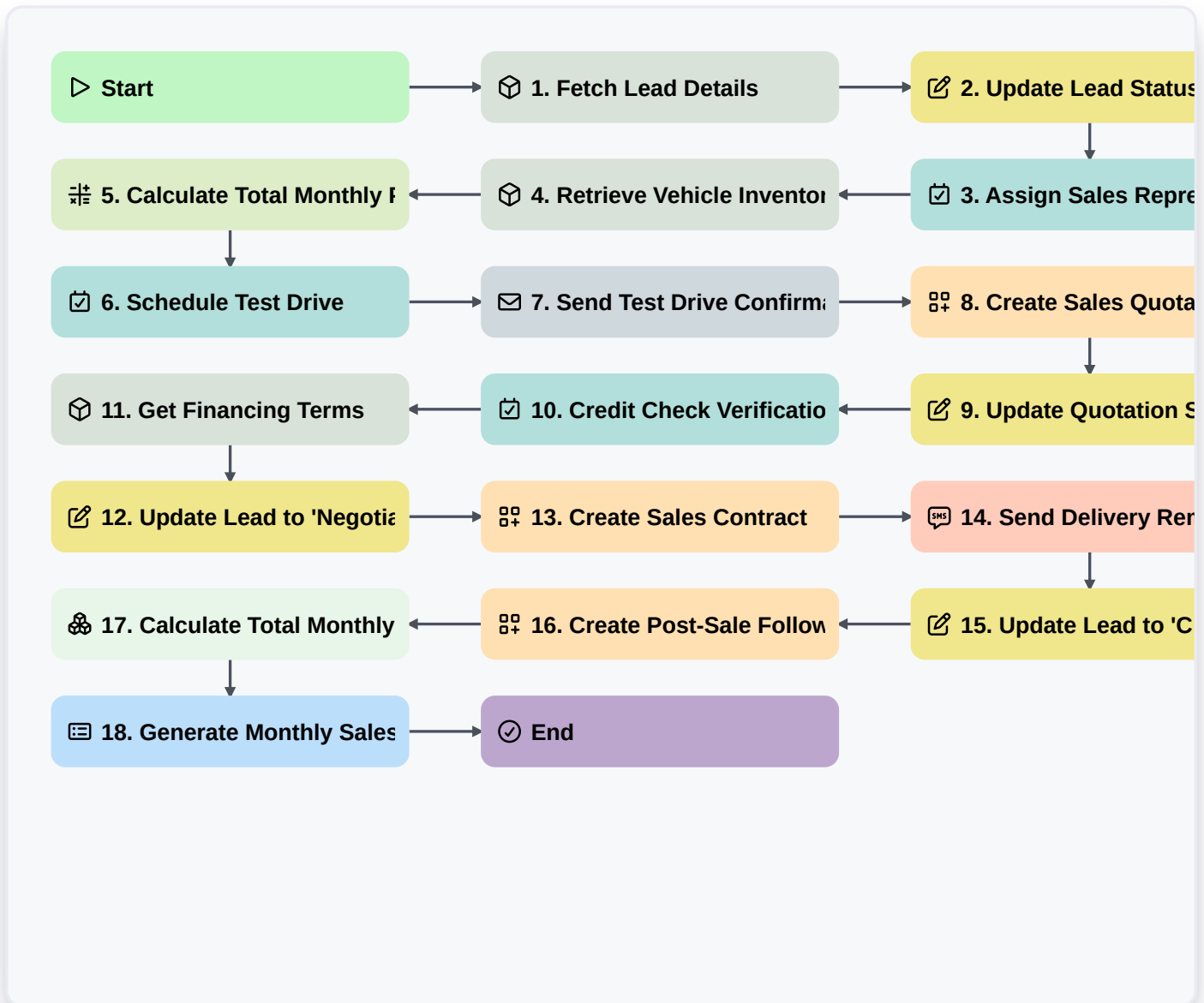


# Automotive Sales Pipeline Management



## ▷ Start

Start of the Workflow/Process.

## 📦 1. Fetch Lead Details

Retrieve the initial lead information from the 'Leads' data model to begin the pipeline process.

## ✍️ 2. Update Lead Status to 'In Progress'

Change the status of the Lead entry from 'New' to 'Contacted' once the first interaction occurs.

## 📅 3. Assign Sales Representative

Create a task for the assigned Sales Rep to perform a discovery call with the lead.

## 📦 4. Retrieve Vehicle Inventory

Fetch available cars from the 'Inventory' data model that match the customer's requirements.

## 🔢 5. Calculate Total Monthly Payment

Execute a formula involving vehicle price, interest rate, and loan term to estimate monthly costs for the customer.

## 📅 6. Schedule Test Drive

Create a task for the showroom coordinator to prepare the specific vehicle and confirm the appointment.



✉ **7. Send Test Drive Confirmation**

Send an automated email to the customer with the date, time, and location details.

📄 **8. Create Sales Quotation**

Generate a new entry in the 'Quotations' data model containing the negotiated price and terms.

✍ **9. Update Quotation Status to 'Sent'**

Update the quotation entry to reflect that the offer is now with the customer.

📅 **10. Credit Check Verification**

Create a task for the Finance Department to verify the customer's creditworthiness.

📦 **11. Get Financing Terms**

Retrieve approved interest rates and loan durations from the 'Finance' data model.

✍ **12. Update Lead to 'Negotiation'**

Update the Lead entry status to indicate the customer is actively negotiating the deal.

📄 **13. Create Sales Contract**

Create a new entry in the 'Contracts' data model once terms are agreed upon.

📱 **14. Send Delivery Reminder**

Send an SMS to the customer 24 hours before the scheduled vehicle delivery.

✍ **15. Update Lead to 'Closed Won'**

Finalize the lead process by updating the status to 'Closed Won' upon contract signing.

📄 **16. Create Post-Sale Follow-up Task**

Create a task in the 'Customer Success' model to check satisfaction 30 days after delivery.

🔗 **17. Calculate Total Monthly Sales Volume**

Aggregate the 'Total Sale Price' from all 'Closed Won' entries in the current month.

📄 **18. Generate Monthly Sales Performance Report**

Create a report summarizing conversion rates and total revenue from the Sales Pipeline data.

👍 **End**

End of the Workflow/Process.