

Self Service- Vehicle Service Portal

Problem Statement:

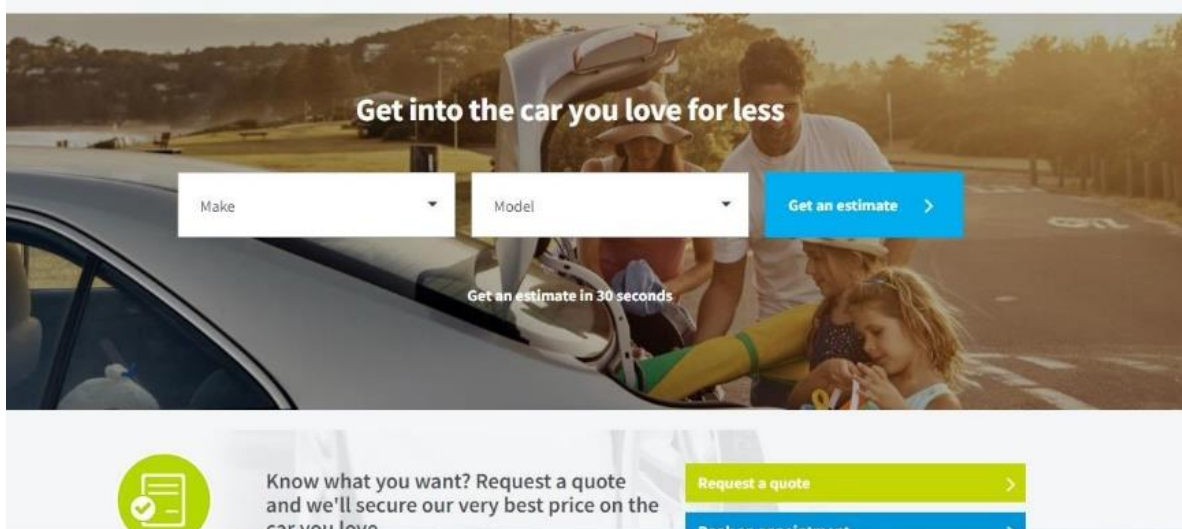
- Customers, both VSP and non-VSP, are reliant on Sales Agents.
- Need lead generation, qualification, and conversion automation.
- In order to request a quote, I need to avoid login into Salesforce.
- Customers want their own site where they can handle their demands.
- Self-Service is required for all inquiries, updates, claims, and cancellations, among other things.

Industry: Fin Corp

Business Unit: Financial Management

Services: Salary Sacrifice and Novated Leasing

Snapshot



Objectives

- ❖ Website Testing (Desktop and Mobile devices)
- ❖ API Testing (VSP to Salesforce/Catch-e and vice-versa)
- ❖ Salesforce Testing (Both SIT and UAT)
- ❖ Compatibility Testing (iOS and Android devices)
- ❖ Performance Testing (Future Scope)
- ❖ Security Testing (Future Scope)

Solution:

- ✓ Customers will be able to access the VSP Portal straight after it has been redesigned in Optimizely (CMS Content Management Tool).
- ✓ Customers can now send an enquiry, which will instantly CREATE/QUALIFY/CONVERT a lead in Salesforce.
- ✓ Customers can request a quote directly from VSP. (Which will be created in Catch-e and synced to Salesforce AS IS)
- ✓ Individual Access to Salesforce (VSP Enabled) will be provided to customers via Azure Token.
- ✓ For a Secure Login, customers will receive OTP verification on their registered mobile number.
- ✓ All data from VSP and non-VSP employers, as well as products, vehicles, leads, and quotes, will be incorporated into Salesforce.
- ✓ Ability to send emails to customers using established templates from Salesforce.
- ✓ To support the whole servicing journey, Salesforce - Sales Cloud and Service Cloud Licenses are being employed.

Key Tools Used

- Jira
- Confluence
- Zephyr
- Browser Stack
- Screaming Frog
- Postman
- Swagger Hub
- Burp Suite

What Was Developed:

- ❖ A customer requests a quote from a leasing sales agent.
- ❖ Customer car information is collected by the Sales Agent, who then –
 - ❖ Creates a Lead in Salesforce.
 - ❖ Each lead is manually qualified and converted.
 - ❖ After the conversion, Salesforce sends a Quote Request to Catch-e.
- ❖ Catch-e generates the quote and syncs it with Salesforce.
- ❖ Salesforce serves as a central store for all Customer, Product, and Quote information.
- ❖ Eloqua is the tool of choice for all email communications.
- ❖ a device Chatbots are utilized for all text-based internet conversations

Technology Stack:

- ❖ VSP – Vehicle Service Portal (Drupal front end website).
- ❖ Catch-e – Quote generator (.Net website)
- ❖ Salesforce – Customer Relationship Management
- ❖ Eloqua – It is a marketing email management technology.
- ❖ Chatbot – It is a Genesys online chatting service; and
- ❖ Optimizely- It is a CMS configuration tool that will replace VSP.

Executive Summary:

We are trying to automate the leasing journey of a customer from self-managing portal which was previously dependent on a Leasing Sales Agent. As a new Leasing Customer, with the new portal, he will be able to process his Vehicle Leasing journey including features like Test Drive, Vehicle Delivered. Novated Lease will help the customer with the benefits listed below: -

- ❖ Make tax savings and discounts on your car and related running expenses.
- ❖ Bundle finance and running costs into one easy payment on payday.
- ❖ Lease a new or used car.
- ❖ Choose the lease term that suits your budget, from one to five years.

Adactin is a premium Australian software consulting company dedicated to excellent software development and testing with a comprehensive service suite encompassing quality assurance, design and development services, data analytics products and other digital transformation enterprise solutions including quality ICT training programs. The company has a core competency and thought leadership position built around the science of IT development and testing application development. For more information, please visit <https://www.adactin.com>

Sydney
Address: 402 Level 4, Station Street East
Parramatta NSW 2150 | Phone: (02) 9057 8016
Fax: +61 2 8824 9522 | Email: info@adactin.com

Canberra
Address: ASL House, 6 Geils Court, Deakin ACT 2600
Phone: (02) 5110 3140 | Email: info@adactin.com

Melbourne
Address: 416-420, Level 2, Collins Street, VIC 3000
Phone: (03) 9115 7477 | Email: info@adactin.com