Digitalization and automation of the PV sales process with focus on creating quotes

Project Work Spring Semester 2023

Student

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Introduction: The recent surge in demand for domestic PV installations has revealed some weaknesses in the sales process of the EKZ Eltop Solar team. The purpose of the project work is to facilitate the work of the EKZ Eltop Solar team by digitalizing and automating their lead-to-order process, with a focus on creating the quote.

Approach: The most common and urgent issues have been determined by understanding the current processes. A new process was elaborated and implemented in cooperation with the EKZ Eltop Solar team. Agile methodology has been used to integrate the end user in the development process at an early stage. During the project work, multiple tests and quality checks have been performed, in order to find the most useful solution for the end user.

Result: A logic app in Microsoft Azure has been developed, which integrates data from Salesforce to Eternity. Automatic project creation in Eternity has been accomplished. This is a core step to achieve the automized quote creation of the PV sales process. For a further integration between Salesforce and Eternity, the Salesforce opportunity ID should be stored in the Eternity project. If a new logic app for updating Salesforce from Eternity is created, one important attribute from Eternity is the final price. The initial price from the "Solarrechner" should be replaced in Salesforce by the final price of Eternity. In order to keep the initial price, it should be stored on the lead in Salesforce.
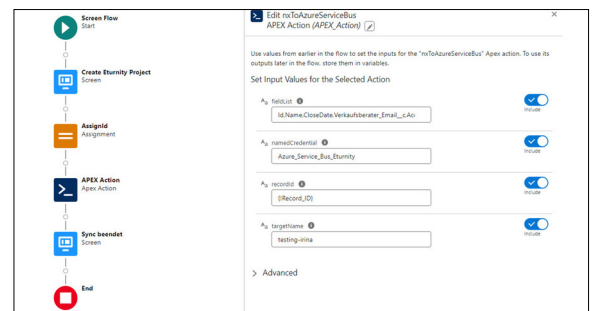
Integration process flow between Salesforce and Eternity

Own presentment
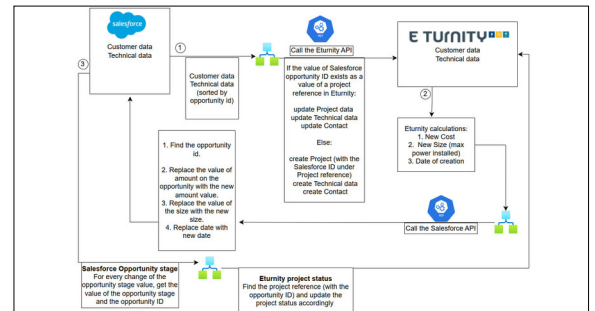
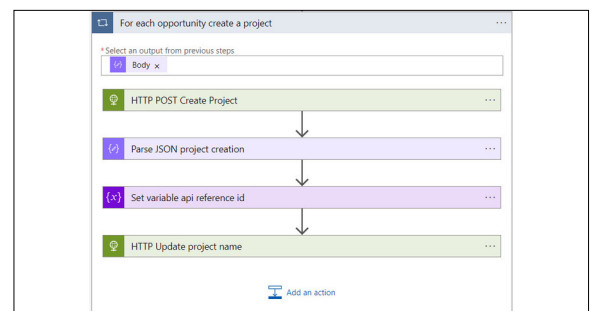**Salesforce flow: APEX action**
Own presentment

Logic app programming interface, HTTP create and update project
Own presentment

Advisor
Prof. Dr. Michael Schueller

Subject Area
Energy and Environment

Project Partner
Elektrizitätswerke Des Kantons Zürich, Dietikon, Zürich