**SYNOPSIS**

**Report on**

**CARTEC HONDA**

**by**

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**ABSTRACT**

This report presents a comprehensive analysis of Cartec Honda's initiative to upgrade its business management system from Excel to Salesforce for improved car service management. The transition aims to streamline customer service tracking and appointment booking processes. The project focuses on establishing a structured role hierarchy within the Salesforce platform to manage user access effectively. Key functional modules include Customer Management, Appointment Booking, Service Tracking, and Role Hierarchy establishment. Non-functional modules address security measures and performance optimization to ensure data integrity and system responsiveness.

Through detailed examination and evaluation, this report highlights the benefits of implementing Salesforce at Cartec Honda, including enhanced operational efficiency, improved customer service, and streamlined service management processes. The findings underscore the significance of functional and non-functional modules in achieving project objectives and optimizing system performance. Additionally, the report discusses challenges encountered during the implementation process and provides recommendations for future enhancements. Overall, this study offers valuable insights into the successful integration of Salesforce for car service management, serving as a guide for businesses seeking similar digital transformation initiatives.

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1. **Introduction**

The Honda, a reputable automotive service provider, presently relies on Excel spreadsheets for managing its business operations. However, recognizing the limitations of this approach, the company is embarking on a transformative journey towards implementing Salesforce, a robust customer relationship management (CRM) platform. The objective is to enhance efficiency and effectiveness in managing their car service processes. The project's primary focus lies in optimizing customer service tracking and appointment booking for car servicing.

By transitioning to Salesforce, Cartec Honda aims to address existing challenges such as data fragmentation, manual processes, and limited scalability inherent in Excel-based systems. The adoption of Salesforce represents a strategic decision to leverage modern technology for streamlining operations and enhancing customer satisfaction.

**Requirements: -**

1. **Hardware –**

Peripheral Devices: Monitor, Mouse and Keyboard

Internet Connection.

Mobile Devices: Optional.

1. **Software –**

Salesforce Platform: Licensing

Salesforce Configuration Tools

Data Migration Tool: DataLoader

Coding Language: Apex

**Modules: -**

* **Customer Management module:**

This module is dedicated to managing customer records efficiently. It includes functionalities such as storing customer contact information, managing their service history, and keeping track of their preferences or special requirements. By centralizing customer data, Cartec Honda can provide personalized services and maintain strong relationships with their customers.

* **Appointment Booking module:**

This module cleans and prepares the collected transaction data for analysis. This may involve tasks such as removing duplicate transactions, correcting errors in the data, and converting the data to a consistent format.

* + **Service Tracking module:**

This module streamlines the Service Tracking module focuses on monitoring service dates for each customer's vehicle. It keeps track of when the car is due for servicing, including both free services covered under warranty and paid servicing thereafter. By maintaining an accurate record of service dates, Cartec Honda can proactively reach out to customers for appointments and ensure timely maintenance of their vehicles.

* + **Role Hierarchy module:**

This module establishes a structured hierarchy for access control and permissions within the Salesforce platform. It defines different user roles and their corresponding access levels, ensuring that users only have access to the information and functionalities relevant to their roles. For example, service technicians may have access to customer service history and appointment details, while administrative staff may have access to billing and reporting functionalities.

* + **Security module:**

This module focuses on ensuring the confidentiality, integrity, and availability of data within the Salesforce platform. It includes measures such as user authentication, data encryption, role-based access control, and monitoring/logging of user activities. By implementing robust security measures, Cartec Honda can protect sensitive customer information from unauthorized access or data breaches.

* + **Deployment module:**

This module deploys the whole project work on live production, all the work done on sandbox and provide to customer for testing and training purpose. When customer requirement fulfill then we deploy it into production.

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1. **Literature Review:**

The integration of Salesforce for car service management represents a strategic endeavor for businesses seeking to modernize their operations and enhance customer service delivery. This literature review explores key themes and findings related to CRM (Customer Relationship Management) systems, Salesforce adoption, and best practices in car service management.

**3. Project / Research Objective:**

The primary objective of this project is to implementation of Salesforce for Car Service Management at Cartec Honda:

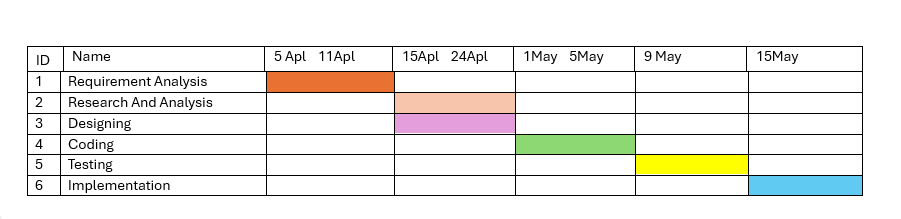
1. **Real-time Service Monitoring:** The Service Tracking module focuses on monitoring service dates for each customer's vehicle. It keeps track of when the car is due for servicing, including both free services covered under warranty and paid servicing thereafter.
2. **Customer Management:** This module is dedicated to managing customer records efficiently. It includes functionalities such as storing customer contact information, managing their service history, and keeping track of their preferences or special requirements.
3. **Performance Optimization**: Top management can view the performance of every employe using the report and Dashboard.

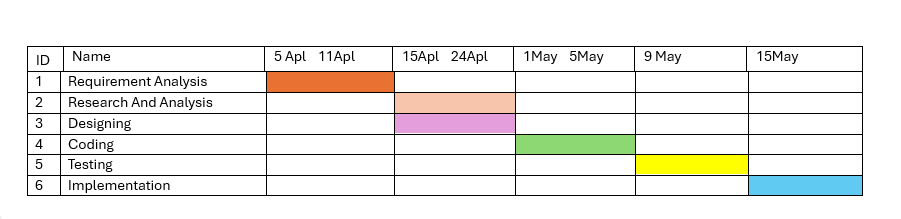
**4. Project Outcome**

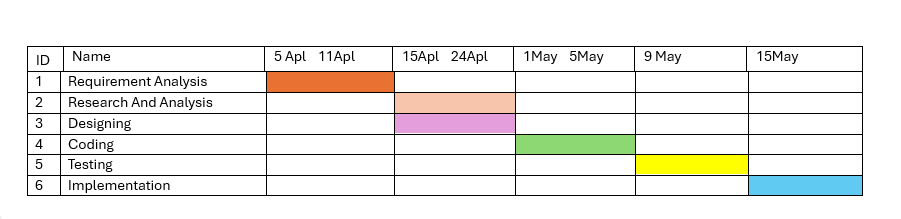
* **Enhanced Operational Efficiency**: An effective Credit Card Fraud Detection System can help to reduce the number of fraudulent transactions that are processed. This can save credit card companies and banks millions of dollars each year.
* **Improved customer satisfaction**: Salesforce empowers Cartec Honda to deliver superior customer service by providing a holistic view of customer interactions, preferences, and service history. With access to comprehensive customer data, service representatives can personalize interactions, anticipate customer needs, and proactively engage customers for appointment scheduling and service reminders. This enhanced level of service is expected to foster customer satisfaction and loyalty.

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* **Data-driven Decision Making**: With Salesforce's robust reporting and analytics capabilities, Cartec Honda gains access to actionable insights derived from comprehensive data analysis. By tracking key performance indicators (KPIs), monitoring service trends, and analyzing customer feedback, the company can make informed decisions to optimize service offerings, allocate resources effectively, and identify opportunities for business growth.
  1. **Proposed Time Duration**

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* 1. **REFERENCES**

1. https://developer.salesforce.com/docs

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