

Phase 2: Org Setup & Initial Configuration

Introduction

Once the problem areas were identified in Phase 1, the next step was to design the technical foundation for AutoFlow CRM. This involved setting up the **Salesforce organization (Org)**, configuring user roles, permissions, and business rules. Without a strong initial setup, later phases like automation, integration, and reporting would not function smoothly.

The goal of this phase was to create a **robust, scalable, and secure CRM environment** tailored to the unique needs of automobile dealerships. This setup ensured that customer requests could be routed effectively, dealership operations were streamlined, and the system could grow with future requirements.

Salesforce Org Setup

AutoFlow CRM was implemented on **Salesforce**, chosen for its flexibility, automation capabilities, and scalability. The initial configuration involved:

1. **Org Creation**
A new Salesforce environment was provisioned for DriveNext Motors. This served as the central hub where all customer, dealership, and vehicle data would be managed.
2. **Business Hours Configuration**
Dealership working hours were configured in the system to ensure that test drives, bookings, and customer communication aligned with real-world operations. This prevented scheduling outside dealership hours.
3. **User Roles & Profiles**
 - **Administrators:** Full control over the CRM system.
 - **Dealership Staff:** Managed orders, test drives, and inventory.
 - **Sales Executives:** Engaged directly with customers.
 - **Managers:** Monitored performance through reports and dashboards.
Profiles controlled what each user could access, while role hierarchies determined data visibility.
4. **Access Permissions**
Proper permissions were set to prevent unauthorized access to sensitive data. For example, dealership staff could view customer data relevant to their branch but not for other branches.

Initial Configuration of Core Features

To address the issues identified in Phase 1, the following configurations were implemented:

1. **Order Routing Rules**
Auto-assignment logic was established so that when a customer submitted a booking

request, the system automatically routed it to the nearest dealership based on the customer's geographical location.

2. **Vehicle Stock Validation**

Before confirming a booking, the system validated the requested vehicle's availability in real time. If the vehicle was unavailable, the booking was restricted.

3. **Queues & Assignment Rules**

Service requests and customer inquiries were directed to the appropriate team members through assignment rules and queues. This prevented bottlenecks and improved response times.

4. **Validation Rules**

Configurations such as preventing duplicate bookings or restricting order confirmation without available stock were applied using Salesforce's declarative tools.

Challenges Faced During Setup

While setting up the organization, the team encountered several challenges:

- **Data Segmentation:** Dealerships operated in different cities, which made it essential to carefully separate data access while still enabling company-wide visibility for administrators.
- **Complex Role Hierarchy:** Multiple layers of users (executives, managers, regional heads) made designing the role structure challenging.
- **Customization vs. Standard Features:** Balancing between using Salesforce's out-of-the-box capabilities and customizing features required thoughtful decisions to avoid over-engineering.

These challenges were addressed by using **best practices for Salesforce configuration**, such as setting up role hierarchies, leveraging record types, and ensuring modular design for future scalability.

Benefits of Org Setup & Initial Configuration

The results of this phase provided a **strong technical foundation**:

- **Efficiency in Order Handling:** Automatic routing reduced manual delays.
- **Data Accuracy:** Stock validation ensured customers could not book unavailable vehicles.
- **Security & Compliance:** Controlled access prevented misuse of customer information.
- **Operational Alignment:** Business hours and rules reflected real dealership practices.
- **Scalability:** The setup ensured that the system could handle future expansions, including new dealerships and regions.