**AutoServe – Salesforce CRM for Car Service Booking & Customer Management Project**

**Implementation Phases Documentation**



**Phase 1: Problem Understanding & Industry Analysis**

**Problem Statement**

Car service centers face challenges with manual booking, overlapping service slots, lack of service reminders, and poor tracking of customer/vehicle history. This leads to longer waiting times, customer dissatisfaction, and missed revenue opportunities.

**Requirement Gathering**

• Customers should be able to book/reschedule/cancel service online or via staff entry.

• System must validate overlapping service slots.

• Automated SMS/Email reminders should be sent for service schedules.

• Technicians should access vehicle service history.

• Managers should track daily bookings, revenue, and technician workload with dashboards.

**Stakeholder Analysis**

• **Customers:** Book/reschedule service, get reminders, track vehicle history.

• **Service Advisors:** Manage bookings, assign technicians, update service status.

**• Technicians:** View assigned jobs, mark completion, update service notes.

• **Admins/Managers:** Oversee bookings, technician utilization, and revenue insights.

**Business Process Mapping**

• **Current Manual Flow:** Customer calls → Advisor notes booking manually → Technician unaware → No reminders → Missed slots.

• **Proposed Salesforce Flow:** Customer books service → Lead auto-captured → Slot validated → Technician assigned → Reminder sent → Service completed → Dashboard updated.

**Industry Use Case Analysis**

• **Pain Points:** Overlapping bookings, no reminders, fragmented history.

• **Opportunities:** CRM automation improves efficiency, reminders reduce no-shows, dashboards improve decision-making.

**AppExchange Exploration**

Reviewed apps like Field Service Lightning and Booking/Reminder apps. Decided to build custom objects, flows, Apex, and LWCs with reference from these apps.