

Salesforce Internship Project Documentation

Project Title: WhatNext Vision Motors - CRM & Service Management System

1. Project Overview

WhatNext Vision Motors is a digital CRM solution built on Salesforce to help a fictional automobile dealership manage their vehicle sales and service operations. The project focused on automating key workflows like test drive bookings, vehicle orders, service requests, and customer follow-ups.

2. Project Objective

The goal was to design a Salesforce-based CRM system that handles:

- Lead management
- Test drive scheduling
- Vehicle booking and order tracking
- Service request management
- Customer feedback and follow-up automation

3. Modules and Features

1. Vehicle Management

Custom Object: Vehicle__c

Fields: Model, Year, Color, Price, Status

Used to store and manage dealership vehicle inventory.

2. Lead & Contact Handling

Standard Objects: Lead, Contact

Automated lead conversion and assignment to sales reps.

3. Test Drive Management

Custom Object: TestDrive__c

Linked to Vehicle and Lead/Contact. Includes date, status, and feedback.

Validation rules prevent overbooking or test drives for unavailable vehicles.

4. Vehicle Order Process

Custom Object: VehicleOrder__c

Captures delivery date, status, and payment. Includes an approval process for managers.

5. Service and Maintenance

Standard Object: Case with custom Record Types: Routine Maintenance, Repair.

Linked to WorkOrder__c for backend processing.

6. Feedback and Follow-Up

Custom Object: Feedback__c

Email alerts and scheduled Flows for reminders. Feedback trends tracked via reports.

4. Automation Implemented

- Validation Rules: Data consistency and restrictions
- Flows: Auto-create records, update statuses, send reminders
- Workflow Rules: Email notifications
- Approval Processes: Manager approval for vehicle bookings
- Scheduled Flows: Automated follow-up tasks

5. Reports and Dashboards

- Test Drive Status
- Vehicle Sales by Model
- Monthly Service Requests
- Lead Conversion Rates
- Feedback Summary

6. Security Setup

- Role-based access via Profiles and Permission Sets
- Record sharing rules for department-level data separation

7. Key Learnings

- Hands-on experience with Salesforce data models and automation
- Process Builder, Flow, and Validation Rules
- App customization using Lightning App Builder
- Report and Dashboard creation for business insights

8. Future Enhancements

- WhatsApp integration for communication
- Einstein AI for smart lead scoring
- Self-service portal using Experience Cloud
- Mobile-first access for field agents

9. Conclusion

This project showcases how Salesforce can be used to create an end-to-end CRM for a car dealership, covering sales, services, and customer engagement. It provided valuable exposure to real-world business logic and Salesforce features.