Project Title

AUTOMOBILE SALES

Team leader NM ID:

5BC07EBAFB172CEAD274F7E17BC9386A

Team Members NM ID:

3FFA8E1762891489FE24F9D79907047E

2423BCE9E07F459841849BC165E0444D

5A4E3D096CC8B26BD0148C3ADCFB1208

76E75E7CB263B7183B54AC6E961CE533

GARAGE MANAGEMENT SYSTEM

PROJECT REVIEW

The Salesforce integration streamlined sales processes and improved customer management. Challenges like data migration and training were resolved with planning. The project resulted in faster sales, better customer service, and enhanced efficiency.

OBJECTIVES

BUSINESS GOALS:

- Increase sales and revenue through efficient processes.
- Improve customer satisfaction and retention.
- Reduce operational costs with automation.
- Strengthen decision-making with data-driven insights.
- Build a scalable and adaptable sales framework.
- Enhance market competitiveness through digital transformation.

SPECIFIC OUTCOMES:

Centralized Management System: A user-friendly platform to manage appointments, services, customer details, and inventory seamlessly in one place, ensuring efficiency and organization.

Automated Notifications: Automated reminders and status updates keep customers informed about service progress and completion, enhancing communication and satisfaction.

Salesforce Key Features and Concepts Utilized: Integration of CRM tools for effective customer management, automation for timely reminders and updates, and analytics for performance tracking on a secure, cloud-based platform.

\Salesforce Mobile App

On-the-Go Management: Enables managers and staff to monitor operations, access records, and make updates anytime, anywhere.

Role-Based Access Control: Maintains data privacy by granting access only to authorized personnel.

Audit Trail: Tracks changes in records to ensure accountability and compliance.

Detailed Steps to Solution Design

Define Business Needs: Identify key sales processes like lead management, inventory tracking, and customer service.

Customize Salesforce: Tailor Salesforce objects and fields to suit automobile sales needs. Set up workflows and lead assignment rules.

Data Migration: Transfer customer and vehicle data from existing systems into Salesforce.

Set Up Mobile Access: Enable the Salesforce mobile app for sales teams to manage operations on-the-go.

Automate Processes: Use automation tools to streamline tasks like reminders and follow-ups.

Create Reports: Set up dashboards and reports to track sales, inventory, and customer interactions.

Train Users: Provide training for staff on using Salesforce effectively.

Test and Launch: Test the system, fix issues, and launch Salesforce for use.

Support and Improve: Monitor system performance, gather feedback, and make improvements as needed.

Testing and Validation

Data Integrity Testing: Ensure accurate transfer of customer, vehicle, and sales data to Salesforce without errors.

Workflow Validation: Test automated processes like lead assignments, reminders, and follow-ups to ensure they function properly.

User Role Testing: Verify that role-based access controls are correctly set, ensuring proper data access for each user.

Mobile App Functionality: Test the Salesforce mobile app for smooth access to customer data, lead updates, and inventory management.

User Acceptance Testing (UAT): Involve key users to test common tasks and gather feedback to ensure the system meets business needs.

Key Scenarios Addressed by Salesforce in the Implementation Project

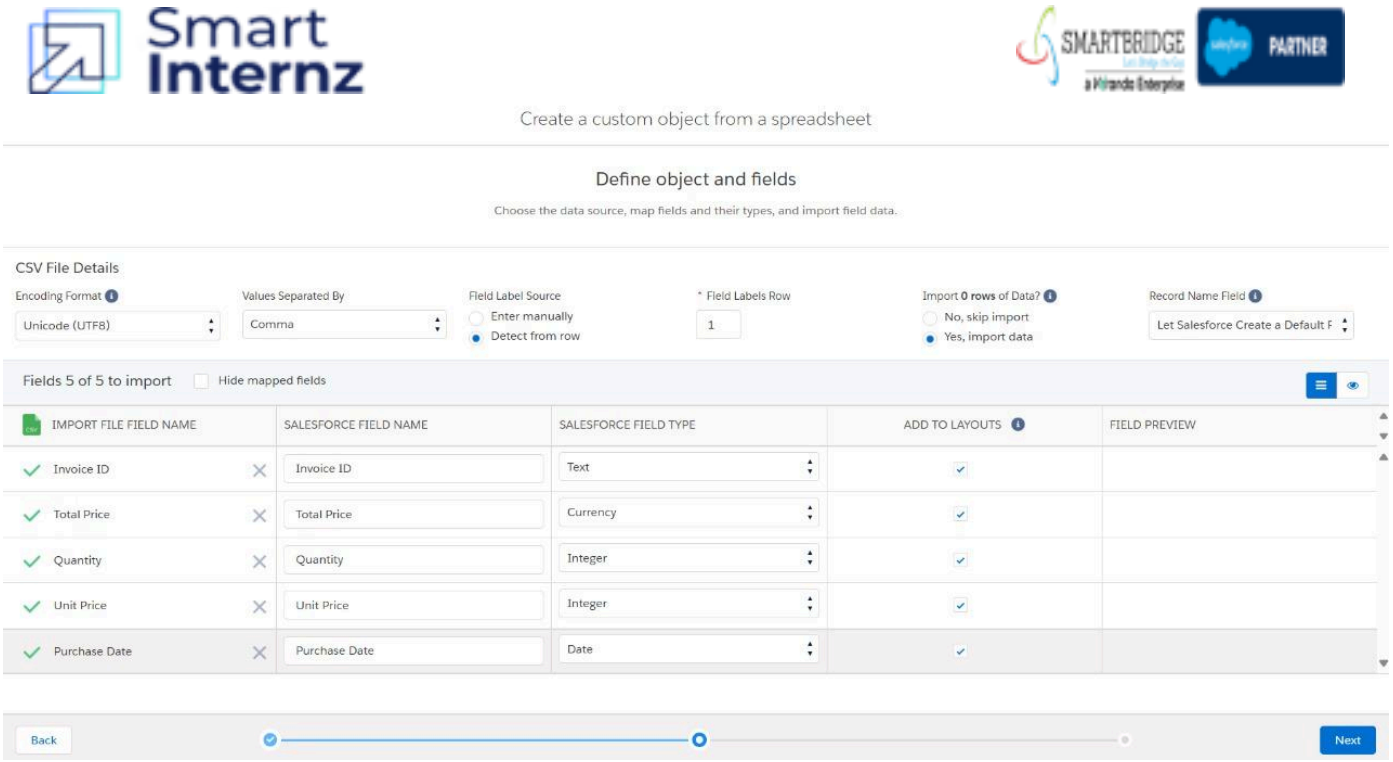
Lead Management: Automates lead capture, tracking, and assignment to improve conversion rates.

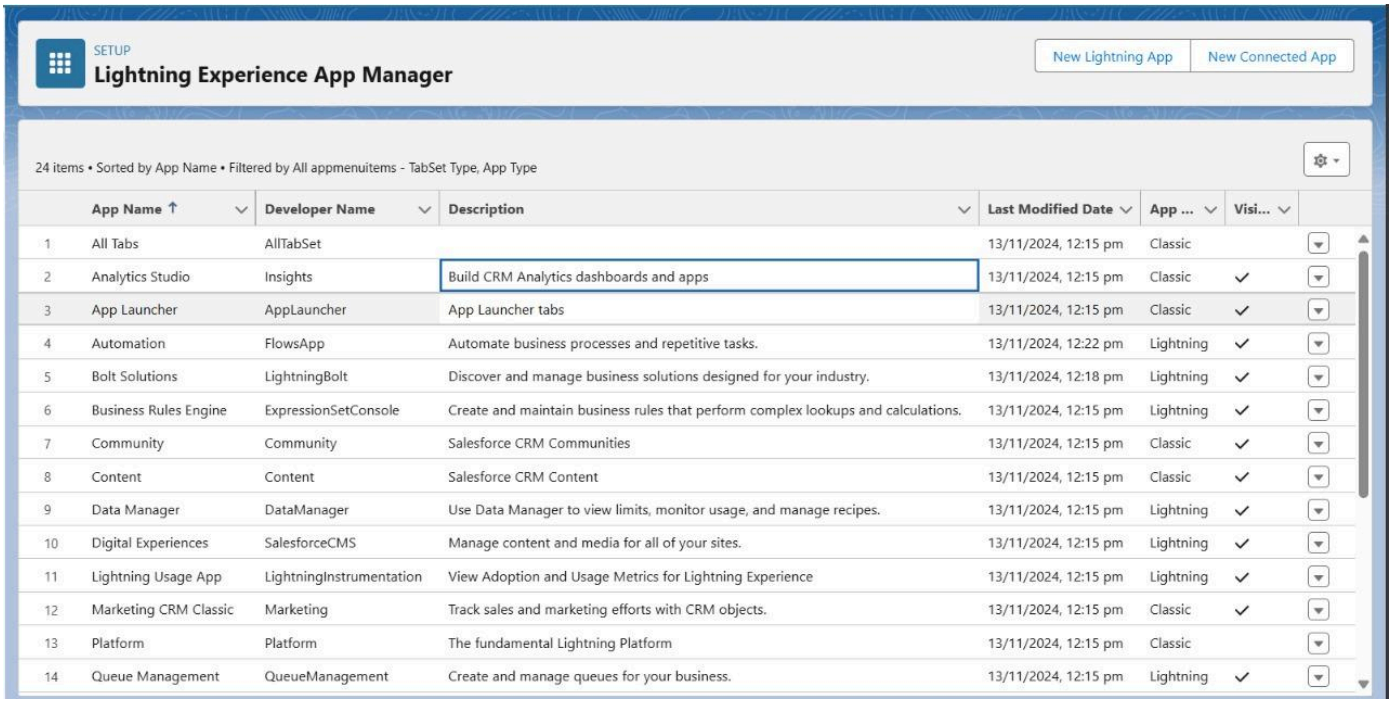
Customer Data Management: Centralizes customer information for personalized service and efficient support.

Inventory Tracking: Provides real-time vehicle inventory management across multiple locations.

Sales Performance Monitoring: Offers dashboards and reports to track sales activities and KPIs.

Customer Service and Support: Automates service reminders, appointments, and post-sale support for better customer satisfaction.


Smart Internz
SMARTBRIDGE
PARTNER
Create a custom object from a spreadsheet
Define object and fields
Choose the data source, map fields and their types, and import field data.
CSV File Details
Encoding Format
Unicode (UTF8)
Values Separated By
Comma
Field Label Source
Enter manually
Detect from row
* Field Labels Row
1
Import 0 rows of Data?
No, skip import
Yes, import data
Record Name Field
Let Salesforce Create a Default F
Fields 5 of 5 to import
Hide mapped fields
IMPORT FILE FIELD NAME
SALESFORCE FIELD NAME
SALESFORCE FIELD TYPE
ADD TO LAYOUTS
FIELD PREVIEW
Invoice ID
Invoice ID
Text
Total Price
Total Price
Currency
Quantity
Quantity
Integer
Unit Price
Unit Price
Integer
Purchase Date
Purchase Date
Date
Back
Next



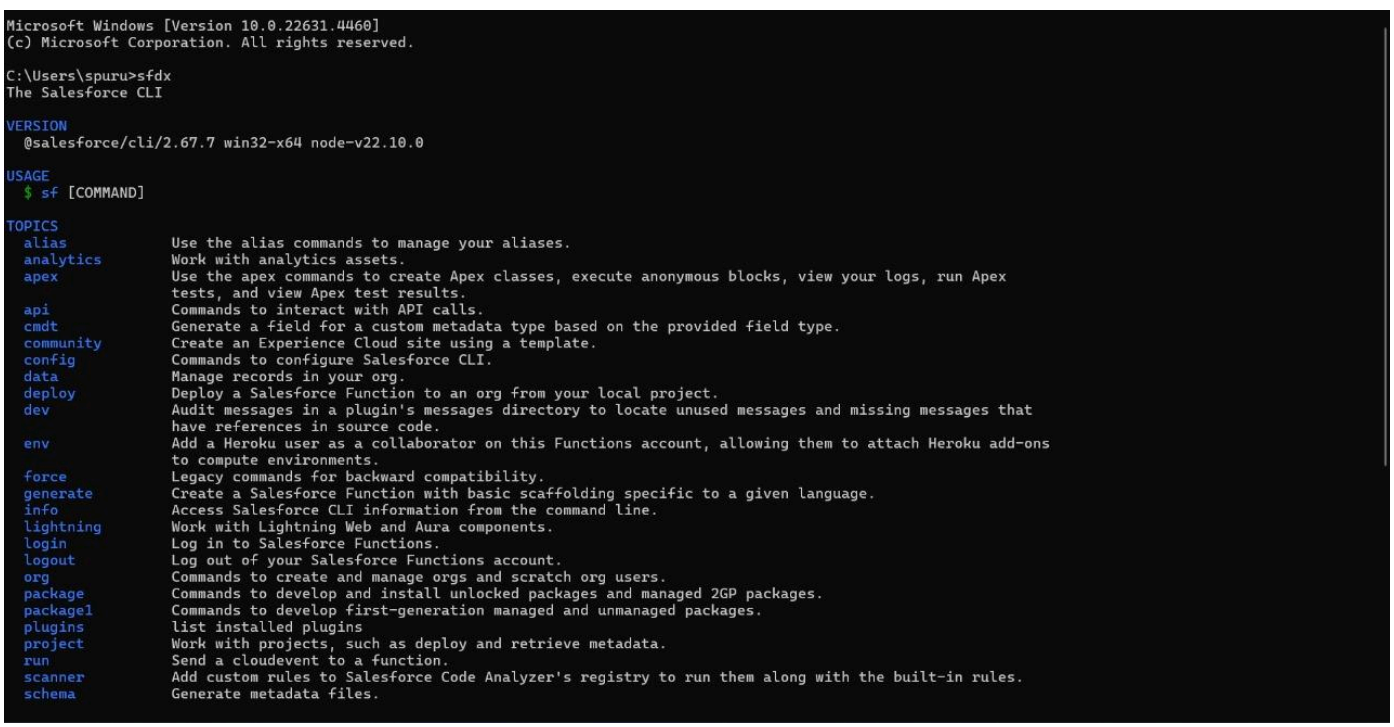
SETUP

Lightning Experience App Manager

New Lightning App | New Connected App

24 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type

	App Name	Developer Name	Description	Last Modified Date	App ...	Visi...
1	All Tabs	AllTabSet		13/11/2024, 12:15 pm	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	13/11/2024, 12:15 pm	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	13/11/2024, 12:15 pm	Classic	✓
4	Automation	FlowsApp	Automate business processes and repetitive tasks.	13/11/2024, 12:22 pm	Lightning	✓
5	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	13/11/2024, 12:18 pm	Lightning	✓
6	Business Rules Engine	ExpressionSetConsole	Create and maintain business rules that perform complex lookups and calculations.	13/11/2024, 12:15 pm	Lightning	✓
7	Community	Community	Salesforce CRM Communities	13/11/2024, 12:15 pm	Classic	✓
8	Content	Content	Salesforce CRM Content	13/11/2024, 12:15 pm	Classic	✓
9	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	13/11/2024, 12:15 pm	Lightning	✓
10	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	13/11/2024, 12:15 pm	Lightning	✓
11	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	13/11/2024, 12:15 pm	Lightning	✓
12	Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	13/11/2024, 12:15 pm	Classic	✓
13	Platform	Platform	The fundamental Lightning Platform	13/11/2024, 12:15 pm	Classic	
14	Queue Management	QueueManagement	Create and manage queues for your business.	13/11/2024, 12:15 pm	Lightning	✓



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Microsoft Windows [Version 10.0.22631.4460]
(c) Microsoft Corporation. All rights reserved.

C:\Users\spuru>sfdx
The Salesforce CLI

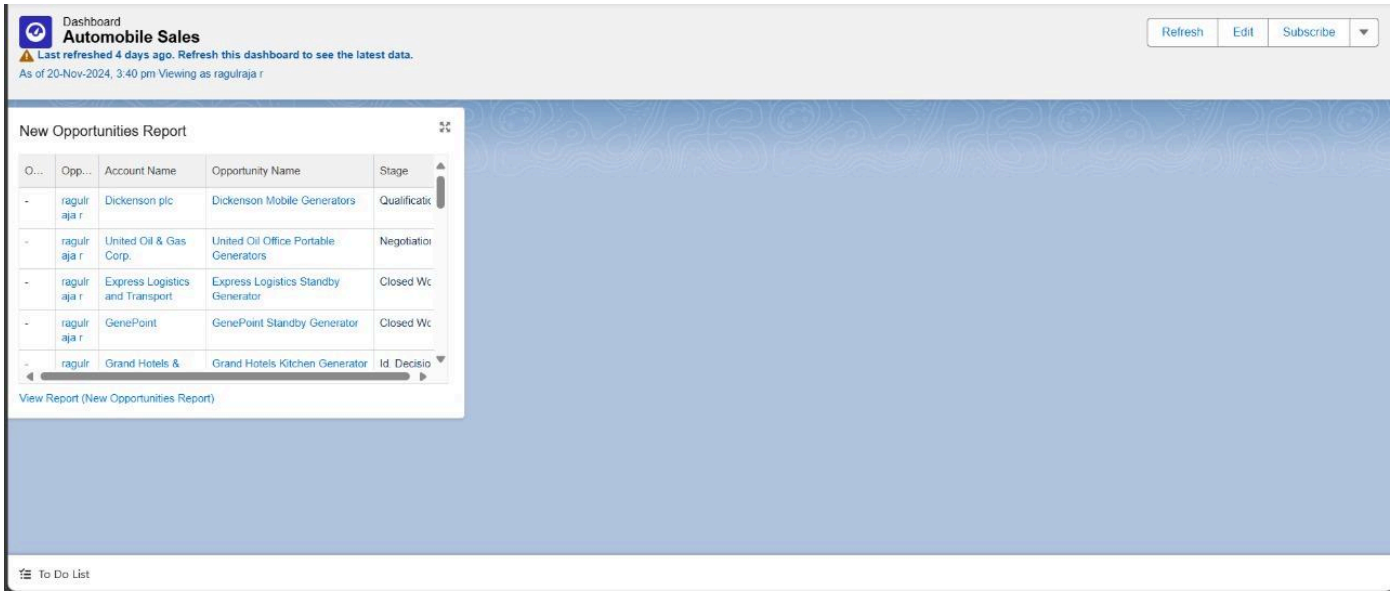
VERSION
  @salesforce/cli/2.67.7 win32-x64 node-v22.10.0

USAGE
  $ sf [COMMAND]

TOPICS
  alias            Use the alias commands to manage your aliases.
  analytics        Work with analytics assets.
  apex             Use the apex commands to create Apex classes, execute anonymous blocks, view your logs, run Apex
                   tests, and view Apex test results.
  api              Commands to interact with API calls.
  cmdt             Generate a field for a custom metadata type based on the provided field type.
  community        Create an Experience Cloud site using a template.
  config           Commands to configure Salesforce CLI.
  data             Manage records in your org.
  deploy           Deploy a Salesforce Function to an org from your local project.
  dev              Audit messages in a plugin's messages directory to locate unused messages and missing messages that
                   have references in source code.
  env              Add a Heroku user as a collaborator on this Functions account, allowing them to attach Heroku add-ons
                   to compute environments.
  force            Legacy commands for backward compatibility.
  generate         Create a Salesforce Function with basic scaffolding specific to a given language.
  info             Access Salesforce CLI information from the command line.
  lightning        Work with Lightning Web and Aura components.
  login            Log in to Salesforce Functions.
  logout           Log out of your Salesforce Functions account.
  org              Commands to create and manage orgs and scratch org users.
  package          Commands to develop and install unlocked packages and managed 2GP packages.
  package1         Commands to develop first-generation managed and unmanaged packages.
  plugins          list installed plugins
  project          Work with projects, such as deploy and retrieve metadata.
  run              Send a cloudevent to a function.
  scanner          Add custom rules to Salesforce Code Analyzer's registry to run them along with the built-in rules.
  schema           Generate metadata files.
```

Smart Internz

SMARTBRIDGE a Mirando Enterprise PARTNER



Conclusion:

The Salesforce implementation for automobile sales successfully streamlined operations, improved customer management, and enhanced sales performance. By automating key processes, providing real-time insights, and centralizing data, it enabled teams to work more efficiently and deliver personalized customer experiences. This project demonstrated how leveraging Salesforce's powerful tools can drive business growth, improve customer satisfaction, and support long-term scalability in the competitive automobile industry.