

WhatNext Vision Motors: Shaping the Future of Mobility with Innovation and Excellence

Project Overview

WhatsNext Vision Motors is an innovative leader in the automotive industry, committed to revolutionizing the mobility experience through cutting-edge technology. The company's Salesforce CRM project focuses on transforming the customer ordering experience by streamlining dealer assignments, validating stock availability, and automating backend operations. The system enhances user convenience by automatically suggesting the nearest dealer and ensures order accuracy by preventing placement of out-of-stock vehicles. The end result is improved customer satisfaction, reduced manual intervention, and greater operational efficiency.

Objectives

- Improve the customer ordering experience with smart location-based dealer assignment.
- Prevent customer frustration by restricting orders to only in-stock vehicles.
- Streamline operational workflows by automating order updates and notifications.
- Enhance transparency in order processing with real-time status updates.
- Reduce manual workload and allow employees to focus on strategic tasks.

Phase 1: Requirement Analysis & Planning

Understanding Business Requirements

Customers often face inconvenience when manually selecting dealers or unknowingly placing orders for unavailable vehicles.

The need was to create an intelligent ordering and fulfillment system with real-time validation and automation.

Defining Project Scope and Objectives

Suggest nearest dealers automatically based on customer address.

Prevent order placement if stock is unavailable.

Update order status to "Confirmed" or "Pending" based on stock levels.

Schedule email reminders and notifications.

Data Model & Security Model

Objects: Vehicle, Dealer, Order, Customer, Test Drive.

Relationships: Customer ↔ Orders, Dealer ↔ Vehicles, Order ↔ Vehicle.

Security Model: Profiles, Roles, Field-level Security, Sharing Rules.

Phase 2: Salesforce Development – Backend & Configurations

Environment Setup: Sandbox and Developer edition used for development.

Object Customization: Standard and custom objects configured.

Fields & Validation Rules:

Custom validation to prevent ordering when stock = 0.

Automation Tools Used:

Record-triggered Flows for assigning dealers.

Workflow Rules for email reminders.

Process Builder for order status transitions.

Apex Development:

Triggers for stock validation and dealer assignment.

Trigger handler class to maintain modularity and reusability.

Phase 3: UI/UX Development & Customization

Lightning App Setup: Created a custom app for CRM users.

Page Layouts & Dynamic Forms: Custom record pages per profile.

User Management: Separate profiles for Admin, Sales Rep, Dealer.

Dashboards & Reports:

Vehicle Inventory Report

Order Status Summary

Dealer Performance Dashboard

LWC Components: (Optional – future enhancement)

Phase 4: Data Migration, Testing & Security

Data Import: Used Data Loader for vehicle and dealer data.

History & Matching Rules:

Enabled field history tracking for order and vehicle objects.

Duplicate & matching rules applied on vehicle and dealer data.

Security Setup:

Configured profiles, permission sets, role hierarchy, and sharing rules.

Testing Approach:

Test classes for all Apex logic.

Unit testing with both positive and negative scenarios.

Test Cases Included:

Order creation validation.

Dealer assignment flow.

Email reminder workflow.

Batch job execution and scheduled status updates.

Phase 5: Deployment, Documentation & Maintenance

Deployment Strategy: Used Change Sets for deployment from Sandbox to Production.

Maintenance Plan:

Admin monitoring of logs and flows.

Error handling via debug logs and scheduled job monitoring.

Troubleshooting Approach:

Log-based error tracking.

Admin alerts for failed automation.

Conclusion

The Salesforce CRM implementation at WhatsNext Vision Motors has significantly improved the ordering workflow, stock management, and customer communication. Automation has reduced manual workload, and smart features have enhanced user experience. The system is scalable, maintainable, and aligned with business goals of efficiency, innovation, and customer satisfaction.

Additional Notes

All configurations and workflows are documented with screenshots (to be added).

Future enhancements include:

Integration of a chatbot for order tracking.

AI-based dealer recommendations.

Multilingual UI for rural customers.