Salesforce-Powered Customer Ordering & Stock Management System

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✖️ Use Cases

1. Dealer Location Recommendation

- Automatically detect customer address.

- Suggest nearest available dealer.

- Reduce effort and time for customers.

2. Stock Availability Management

- Prevent order creation for out-of-stock vehicles.

- Ensure customers only see and order what's available.

- Improve accuracy in order fulfillment.

3. Bulk Order Status Automation

- Scheduled job checks stock for each bulk order.

- Status auto-updated to *Pending* if stock unavailable.

- Status auto-updated to *Confirmed* if stock is in inventory.

- Provides transparent communication to customers.

4. Customer Experience Enhancement

- Faster, error-free ordering.

- Real-time updates on order fulfillment.

- Reduced chances of customer dissatisfaction.

5. Operational Efficiency

- Reduced manual verification of stock.

- Staff freed from repetitive tasks.

- Focus on strategic customer service and growth.

✅ Phase 1: Problem Understanding & Industry Analysis

1. Requirement Gathering
The first step involves identifying the core needs of the business process. For WhatsNext Vision Motors, this includes collecting requirements for:

- **Dealer location mapping** to suggest the nearest dealer to customers automatically.

- **Stock availability checks** to prevent customers from ordering unavailable vehicles.

- **Automated bulk order updates** to ensure accuracy and reduce manual intervention.

2. Stakeholder Analysis
The project considers all key participants who influence or are impacted by the system:

- **Customers:** Expect a smooth, error-free ordering process.

- **Dealers:** Need visibility into stock and customer demand.

- **Operations Managers:** Oversee order processing and efficiency.

- **Sales Teams:** Use CRM data to manage leads and orders.

- **Admins:** Maintain system configurations and workflows.

3. Business Process Mapping
The customer ordering process is mapped from start to finish to highlight gaps and opportunities:

- **Order Placement → Stock Verification → Dealer Assignment → Status Update.**
  This ensures clarity in process flow, reduces redundancy, and establishes a clear order lifecycle.

4. Industry-specific Use Case Analysis
Within the automotive retail sector, the focus is on:

- **Order accuracy** to prevent errors.

- **Customer experience** to build loyalty.

- **Transparency** in stock and order status to strengthen trust.

5. AppExchange Exploration

Exploring Salesforce AppExchange solutions helps reduce development time:

- **Stock management apps** for inventory control.

- **Dealer locator tools** to map nearest dealers.

- **Order automation accelerators** to streamline updates.