

★ Industry: Automotive & Mobility

Project Type: Salesforce CRM Implementation

Target Users: Customers, Dealers, Sales Teams, Operations Managers

Problem Statement

WhatsNext Vision Motors, a pioneering force in the automotive industry, is dedicated to transforming the mobility sector with innovative technology and solutions that prioritize customer needs.

Currently, the company faces several challenges in its customer ordering process:

- Customers do not always know the nearest dealer location, leading to inconvenience and delays.
- Customers may attempt to place orders for vehicles that are out of stock, causing confusion and dissatisfaction.
- Bulk orders are not updated systematically, leading to errors in order status communication.

To address these challenges, WhatsNext Vision Motors has embarked on a **Salesforce CRM project** with the following core objectives:

- Enhance the customer ordering process by suggesting the nearest dealer location automatically.
- Prevent out-of-stock vehicles from being ordered, ensuring only available products can be purchased.
- Automate the scheduled updating of bulk order statuses based on stock availability.

This system will provide clear, accurate, and timely information to both customers and staff, ensuring transparency, improving customer satisfaction, and streamlining internal operations.

***** 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

- Requirement Gathering: Collect requirements around dealer location mapping, stock availability, and automated order updates.
- Stakeholder Analysis: Identify customers, dealers, operations managers, sales teams, and admins.
- Business Process Mapping: Map end-to-end flow from order placement → stock verification →
 dealer assignment → status update.
- Industry-specific Use Case Analysis: Focus on order accuracy, customer experience, and transparency in automotive retail.
- AppExchange Exploration: Explore stock management apps, dealer locator solutions, and order automation accelerators.

Phase 2: Org Setup & Configuration

- Salesforce Editions: Choose Enterprise Edition to allow automation and integrations.
- Company Profile Setup: Configure company information for WhatsNext Vision Motors.
- Business Hours & Holidays: Define operating hours for dealers and sales support.
- **Fiscal Year Settings:** Align reports to the company's financial calendar.
- User Setup & Licenses: Create users for sales reps, dealers, and order managers.
- Profiles, Roles & Permission Sets: Control access based on user responsibilities.
- OWD & Sharing Rules: Protect customer order data while sharing with assigned dealers.
- Login Access Policies: Secure login for internal staff and partners.
- Dev Org & Sandbox: Establish development/test environments.
- **Deployment Basics:** Plan migration from sandbox to production.

Phase 3: Data Modeling & Relationships

- Standard & Custom Objects: Orders, Vehicles, Dealers, Customers, Stock Records.
- Fields: Dealer location, vehicle availability status, order status.
- **Record Types:** Retail order, bulk order.
- Page Layouts: Separate layouts for customer service vs dealer views.
- **Compact Layouts:** Quick view of vehicle availability and order status.
- Schema Builder: Visualize order-to-stock relationships.
- Relationships: Master-Detail between Orders and Vehicles; Lookup between Dealers and Orders.
- **Junction Objects:** For linking multiple dealers to multiple vehicle models.
- External Objects: Import stock data from external ERP.

✓ Phase 4: Process Automation (Admin)

- Validation Rules: Prevent creation of orders for unavailable stock.
- Workflow Rules: Notify customers when order status changes.
- Process Builder: Auto-assign orders to nearest dealer based on address.
- Approval Process: Manager approval for bulk orders.
- Flow Builder:
 - o Record-Triggered → Auto-update status (*Pending/Confirmed*).
 - o Scheduled → Bulk update process for stock validation.
- Email Alerts: Order confirmation emails.
- Field Updates: Automatically set Pending or Confirmed status.
- **Tasks:** Assign follow-up actions to sales agents.
- **Custom Notifications:** Push alerts to dealers for new orders.

Phase 5: Apex Programming (Developer)

- Classes & Objects: Custom logic for dealer recommendation.
- Apex Triggers: Prevent orders for out-of-stock vehicles.
- SOQL & SOSL: Fetch nearest dealer and stock status.
- Batch Apex: Handle scheduled updates of large bulk order datasets.
- Queueable & Scheduled Apex: Automate stock validation processes.
- Future Methods: Call external APIs for stock synchronization.
- Exception Handling: Gracefully manage missing dealer/stock data.
- **Test Classes:** Ensure automation runs accurately across scenarios.

Phase 6: User Interface Development

- Lightning App Builder: Build "Order Management Dashboard."
- Record Pages: Customer Order page with stock availability.
- Tabs: Orders, Dealers, Vehicles, Bulk Orders.
- **Utility Bar:** Quick dealer lookup tool.
- LWC (Lightning Web Components):
 - Nearest dealer locator map.
 - Stock availability indicator.
- Apex with LWC: Fetch real-time dealer + stock info.
- Events in LWC: Update UI when stock status changes.
- Navigation Service: Direct user to recommended dealer record.

Phase 7: Integration & External Access

- Named Credentials: Connect to ERP system for stock data.
- External Services: Link to dealer locator APIs.
- Web Services (REST/SOAP): Sync vehicle stock from external system.
- **Callouts:** Verify stock availability in real time.
- Platform Events: Broadcast order status updates.
- Change Data Capture: Update dashboards when stock changes.
- Salesforce Connect: Access external dealer/stock system data.
- OAuth & Authentication: Secure API integrations.

✓ Phase 8: Data Management & Deployment

- Data Import Wizard & Data Loader: Import dealer and vehicle data.
- **Duplicate Rules:** Prevent duplicate orders for same vehicle.
- Data Export & Backup: Ensure historical order data is backed up.
- Change Sets: Deploy flows and triggers.
- Unmanaged vs Managed Packages: Use custom solutions for stock management.
- VS Code & SFDX: Build and deploy custom Apex classes.

Phase 9: Reporting, Dashboards & Security Review

- **Reports:** Orders by dealer, vehicle stock levels, pending vs confirmed orders.
- **Report Types:** Custom report for dealer-wise vehicle sales.
- Dashboards: Real-time "Order Fulfillment & Stock Availability Dashboard."
- **Dynamic Dashboards:** Different views for customers, sales teams, and management.
- Sharing Settings & Field Level Security: Protect sensitive customer and stock data.
- Session Settings & Login IP Ranges: Restrict access for internal users.

• Audit Trail: Track changes to stock and order data.

Phase 10: Final Presentation & Demo Day

- **Pitch Presentation:** Present improvements in customer ordering journey.
- Demo Walkthrough: Customer places order → Nearest dealer auto-suggested → Stock validated
 → Order confirmed/pending.
- Feedback Collection: From dealers, customers, and operations team.
- Handoff Documentation: Provide technical + functional guides.
- LinkedIn/Portfolio Project Showcase: Highlight innovation in automotive CRM.