Table of Contents

 Project Overview …………………………………………………………………

 Objectives ………………………………………………………………………...

 Phase 1 – Requirement Analysis & Planning …………………………………….

* Business Requirements …………………………………………………
* Scope …………………………………………………………………...
* Data & Security Model …………………………………………………

 Phase 2 – Salesforce Development (Backend & Configurations) ……………….

 Phase 3 – UI/UX Development & Customization ……………………………….

 Phase 4 – Data Migration, Testing & Security ……………………………………

 Phase 5 – Deployment & Maintenance …………………………………………...

 Conclusion ……………………………………………………………………….

 Future Enhancements …………………………………………………………….

**1. Project Overview**

WhatsNext Vision Motors is a pioneering company in the automotive industry that aims to transform the mobility sector using Salesforce CRM. This project focuses on improving the vehicle ordering process, enhancing stock validation, and streamlining dealer assignments to ensure accuracy and efficiency. The system prevents errors, reduces manual tasks, and provides insightful dashboards for better decision-making.

**2. Objectives**

* Provide a centralized Salesforce CRM for managing customers, vehicles, dealers, and orders.
* Automate stock validation and prevent invalid orders.
* Assign dealers automatically based on customer location.
* Enhance operational efficiency using automation, Apex, and batch jobs.
* Provide real-time dashboards and reports for business insights.

**3. Phase 1 – Requirement Analysis & Planning**

**Business Requirements**

* Store and manage vehicle, dealer, and customer records.
* Track vehicle orders, test drives, and service requests.
* Automate dealer assignment and order validation.

**Scope**

* Build custom objects: **Customer, Vehicle, Dealer, Vehicle Order, Test Drive**.
* Automations: **Flows, Apex Triggers, Batch Apex Jobs**.
* Dashboards and Reports for management.

**Data & Security Model**

* Relationships: Vehicle → Dealer, Customer → Vehicle Order.
* Role Hierarchy: Admin → Manager → Sales Rep.
* Profiles & Permission Sets for restricted access.

**4. Phase 2 – Salesforce Development (Backend & Configurations)**

* **Custom Objects & Fields**: Vehicle (Model, Availability), Dealer (Location), Order (Status).
* **Validation Rules**: Prevent order if stock is 0.
* **Flows & Automation**:
  + Flow to assign nearest dealer.
  + Flow to send test drive reminder emails.
* **Apex & Triggers**:
  + Trigger validates stock and updates status (Pending/Confirmed).
  + Trigger handler ensures modularity.
* **Batch Apex**: Nightly job to check and update stock levels.

**5. Phase 3 – UI/UX Development & Customization**

* Lightning App: **WhatsNext Vision Motors CRM**.
* Page Layouts for Customers, Vehicles, Orders.
* Dynamic Forms for stock-dependent fields.
* Dashboards:
  + Orders by Status
  + Stock Availability
  + Dealer Performance

**6. Phase 4 – Data Migration, Testing & Security**

* **Data Migration**: Imported test data with Data Loader.
* **Duplicate Rules**: Prevent duplicate Customer records.
* **Field History Tracking**: Vehicle Order Status.
* **Security**: Profiles & Roles for different user levels.
* **Testing**:
  + Order creation validation.
  + Dealer auto-assignment.
  + Batch job execution.
* **Apex Test Classes**: Achieved 75%+ coverage.

**7. Phase 5 – Deployment & Maintenance**

* **Deployment**: Used Change Sets from Sandbox to Production.
* **Maintenance**:
  + Monitor Batch Apex jobs and debug logs.
  + Update flows and triggers based on new business rules.

**8. Conclusion**

The WhatsNext Vision Motors CRM improves customer experience, automates dealer assignments, and enhances stock validation. It reduces errors, increases efficiency, and provides management with powerful reporting tools.

**9. Future Enhancements**

* AI-driven vehicle recommendations.
* Chatbot for customer inquiries.
* Integration with external stock management systems.