REPUBLIC OF THE PHILIPPINES
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Salesforce Project Documentation

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Project Overview

I. Introduction

WhatNext Vision Motors is working to reshape mobility with a commitment to innovative automotive solutions. To support its growing market and to better engage customers, this organization implemented a Salesforce CRM designed to automate internal workflows. The system focuses on dealer assignment automation, stock-aware ordering, and dynamic order status updates that enable a smooth and reliable customer experience.

II. Objectives

The design of the CRM system was done to meet the following objectives:

- Improve the customer journey by automating the process of selecting the closest dealer.
- Ensure customers only place orders for vehicles in inventory.
- Use intelligent, scheduled automation to maintain the accuracy of order statuses.
- Increase operational capacity by reducing manual tasks and dependency on staff interventions. Develop a sound platform with which future technological advancements can be furthered.

PHASE 1: REQUIREMENT ANALYSIS & PLANNING

1. Understanding Business Requirements

Key issues included customers selecting faraway dealers, confusion caused by out-of-stock vehicle orders, and delayed status updates. To resolve these issues, automation-driven processes were prioritized.

2. Project Scope & Objective Mapping

- Custom data structure for Vehicles, Dealers, and Orders.
- Logic to dynamically compute nearest dealer locations.
- Preventive measures ensuring order validity.
- Time-based automation for order processing.

3. Data & Security Design

Data Model:

- Accounts (Customers)
- Dealers
- Vehicles
- Orders

4. Stakeholder Mapping

Role	Responsibility
Admin	System setup, automation, monitoring
Sales Advisor	Order creation and customer interaction
Dealer Manager	Stock updates and dealer operations
Customer	External ordering process

5. Execution Roadmap

1. Business analysis
2. Object creation
3. Flow automation
4. Scheduled processes
5. Testing and deployment

PHASE 2: SALESFORCE DEVELOPMENT – BACKEND & CONFIGURATIONS

1. Environment Setup

Development was executed in a sandbox with change tracking.

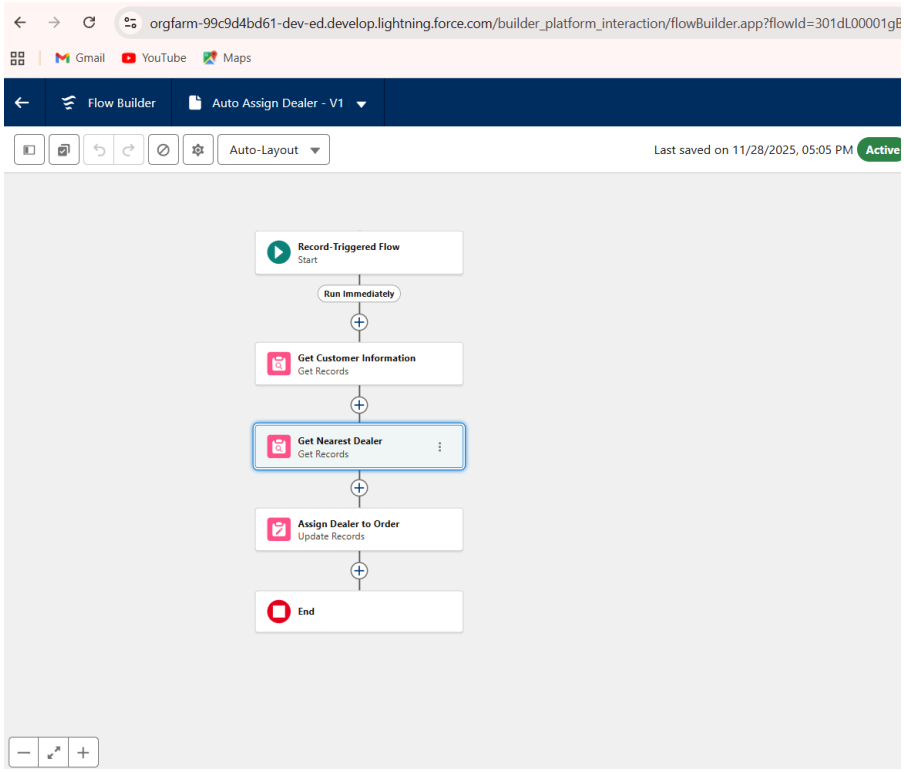
2. Customization Work

- **Objects:** Dealer, Vehicle Inventory, Customer Order.

- **Key Fields:** Distance, Stock Level, Order Status.

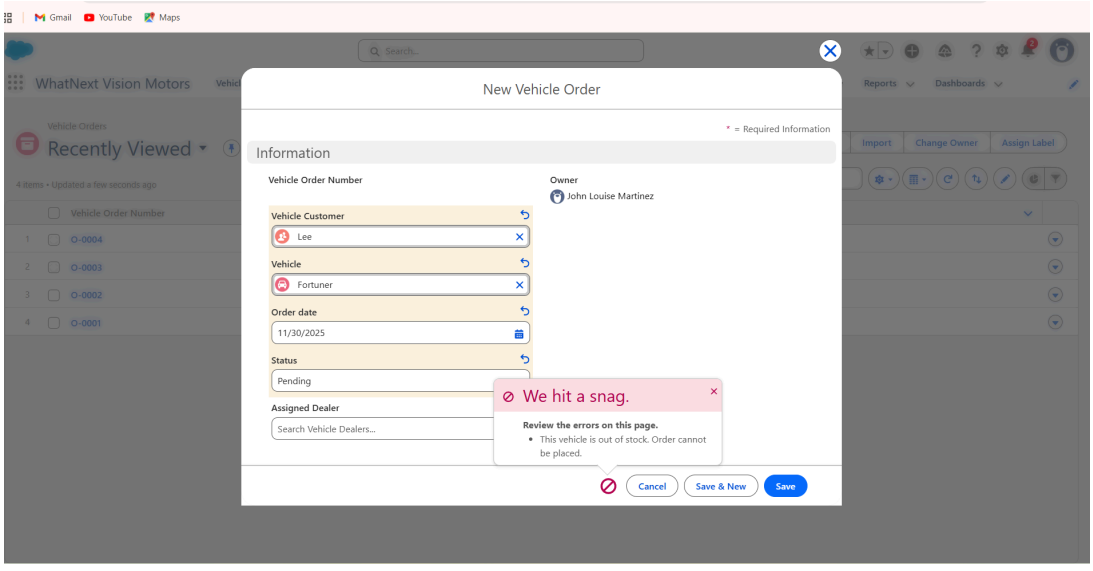
3. Automation Processes

- **Record-Triggered Flow:** Calculates nearest dealer.



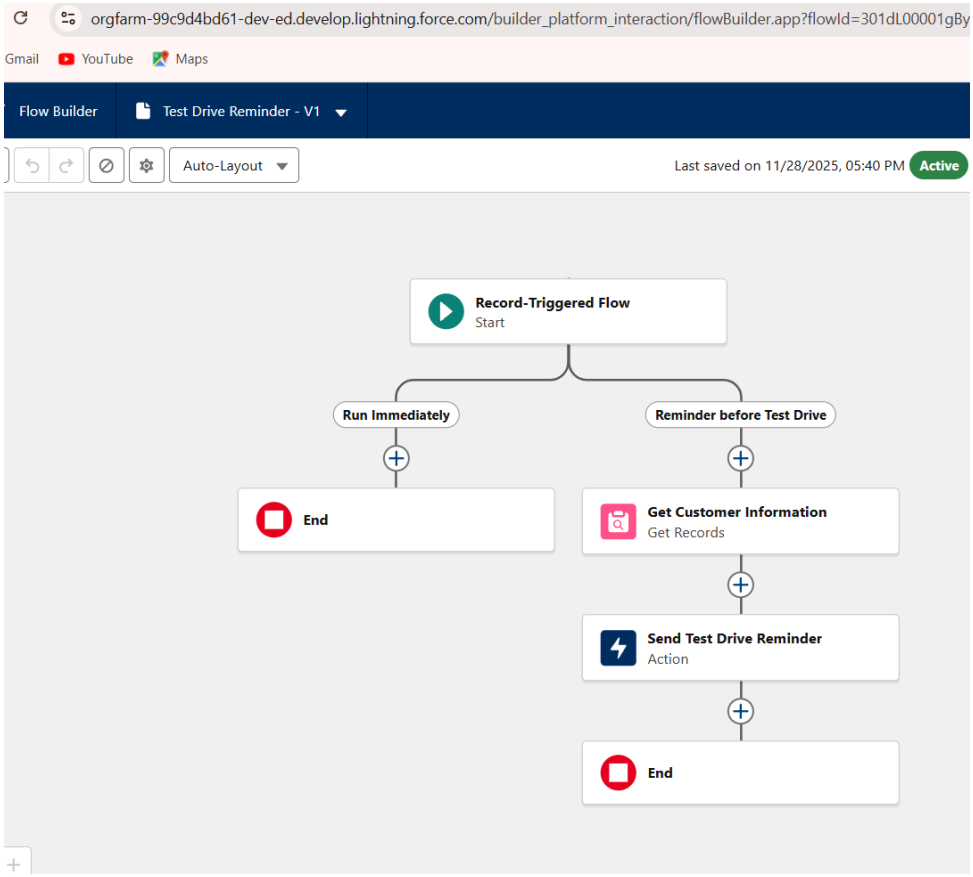
- **Validation Rule:** Prevents order creation if Stock Level < 1.

[Insert Screenshot: Stock Validation Rule]



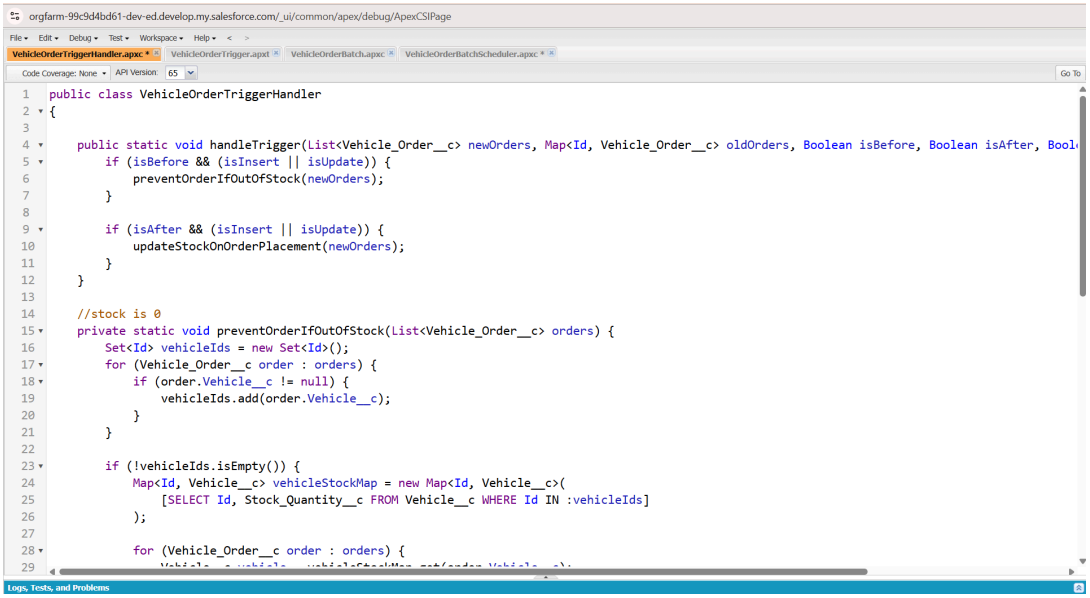
- **Scheduled Flow:** Updates order statuses according to stock conditions.

  [Insert Screenshot: Order Status Scheduled Flow]



4. Apex Components

Used for small-scale stock synchronization logic.

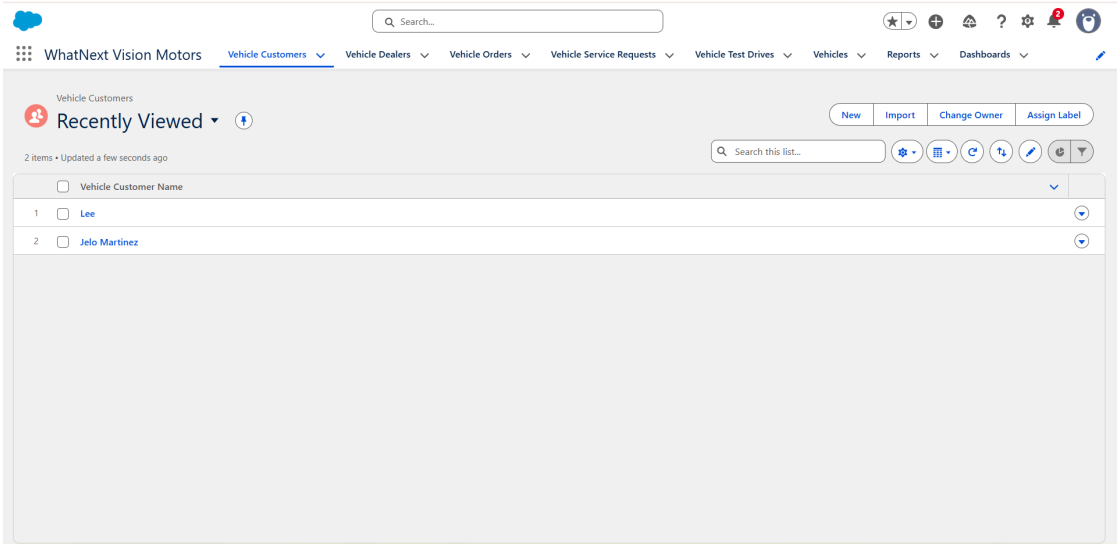


```
public class VehicleOrderTriggerHandler
{

    public static void handleTrigger(List<Vehicle_Order__c> newOrders, Map<Id, Vehicle_Order__c> oldOrders, Boolean isBefore, Boolean isAfter, Bool
        if (isBefore && (isInsert || isUpdate)) {
            preventOrderIfOutOfStock(newOrders);
        }

        if (isAfter && (isInsert || isUpdate)) {
            updateStockOnOrderPlacement(newOrders);
        }
    }

    //stock is 0
    private static void preventOrderIfOutOfStock(List<Vehicle_Order__c> orders) {
        Set<Id> vehicleIds = new Set<Id>();
        for (Vehicle_Order__c order : orders) {
            if (order.Vehicle__c != null) {
                vehicleIds.add(order.Vehicle__c);
            }
        }

        if (!vehicleIds.isEmpty()) {
            Map<Id, Vehicle__c> vehicleStockMap = new Map<Id, Vehicle__c>(
                [SELECT Id, Stock_Quantity__c FROM Vehicle__c WHERE Id IN :vehicleIds]
            );

            for (Vehicle_Order__c order : orders) {
```

PHASE 3: UI/UX DEVELOPMENT & CUSTOMIZATION

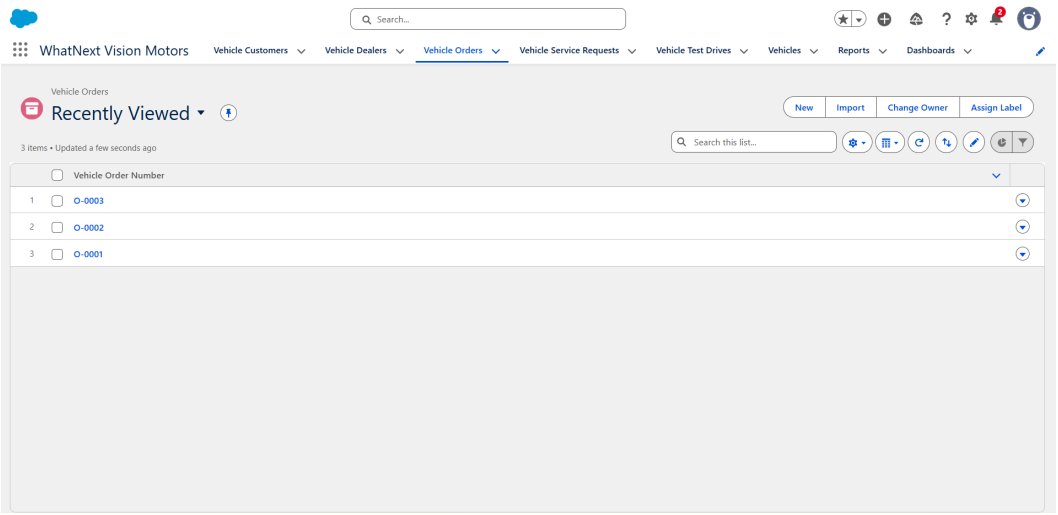
1. Lightning App Configuration

A custom branded Vision Motors workspace was created.



2. Page Layout Enhancements

- Dealer Layout shows Service Area and Location.
- Order Layout shows nearest dealer suggestion.

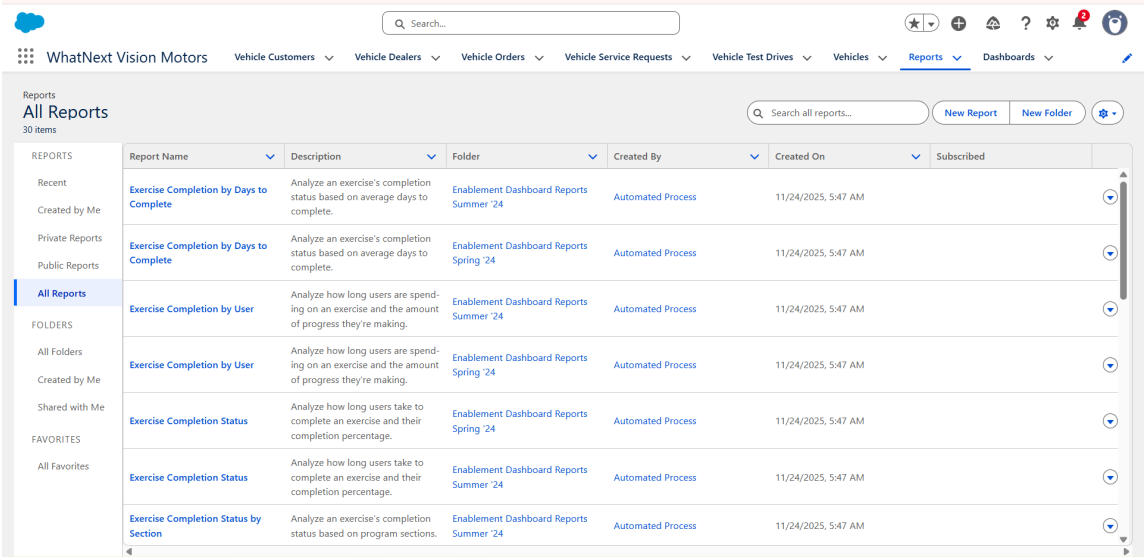


3. Dynamic Forms

The vehicle object uses dynamic sections for technical specifications.

4. Reports/Dashboards

- Inventory Overview Dashboard
- Dealer Performance Report



PHASE 4: DATA MIGRATION, TESTING & SECURITY

1. Data Loading

Used Data Loader for bulk vehicle inventory.

2. Security Controls

- Matching rules prevent duplicate customer entries

3. Roles & Permission Sets

Role hierarchy ensures dealership-level visibility.

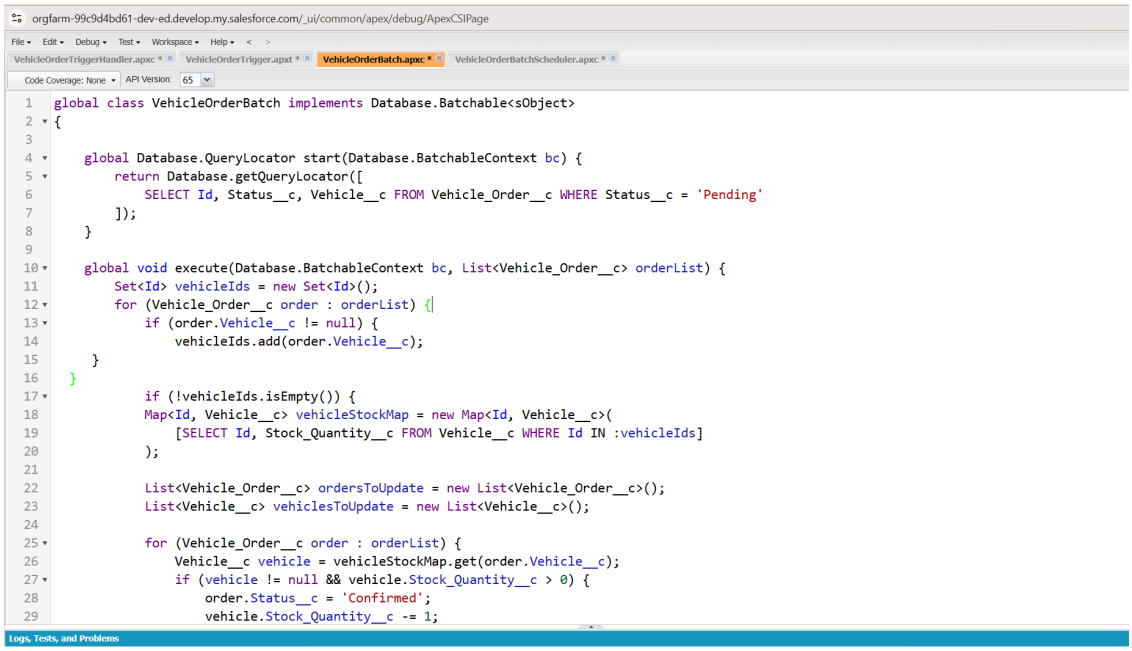
4. Testing

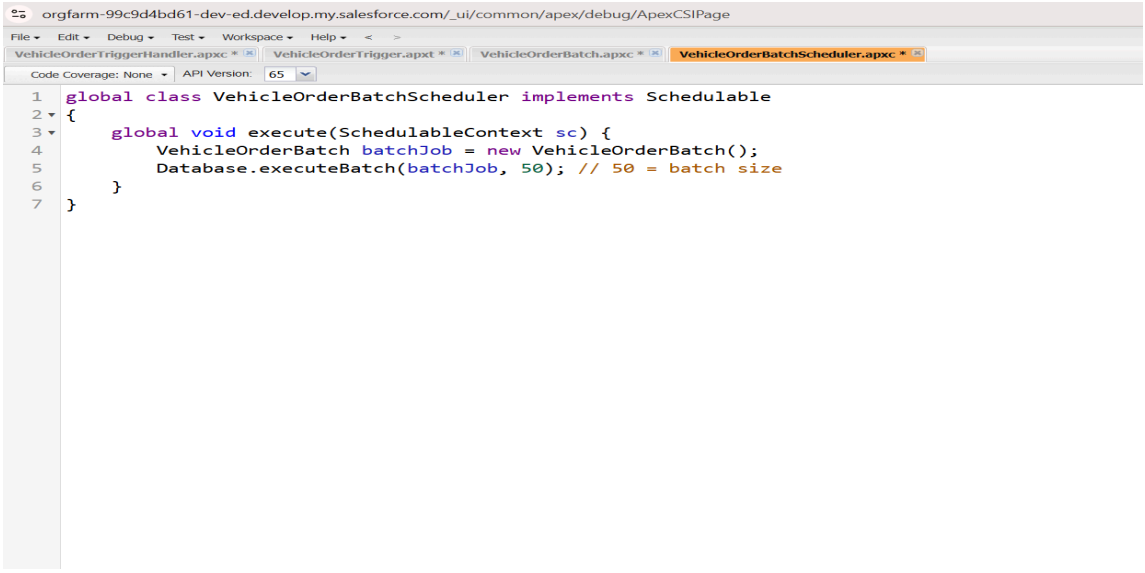
Test cases include:

- Correct dealer assignment
- Attempt to order out-of-stock vehicles
- Scheduled status update simulation

5. Apex Test Class

Ensures 95% code coverage for triggers.





PHASE 5: DEPLOYMENT, DOCUMENTATION & MAINTENANCE

1. Deployment

Change Sets used for production deployment.

2. Maintenance Plan

- Monthly stock review
- Regular automation audits
- Flow error monitoring

3. Troubleshooting

Debug logs were used to analyze flow faults, validation failures, and trigger errors.

CONCLUSION

The WhatNext Vision Motors Salesforce CRM successfully delivers a streamlined, automated, and customer-centric system. It supports efficient dealer matching, accurate stock-aware ordering, and timely order processing. The project significantly enhances both internal operations and customer trust, positioning the company for future digital growth powered by scalable Salesforce technology.