

Documentation And Demo – WhatNext Vision Motors CRM

PROJECT OVERVIEW

This Salesforce CRM project for WhatNext Vision Motors focuses on automating customer, vehicle, dealer, order, test-drive, and service-related operations. The CRM enhances business efficiency through structured data models, automated workflows, Apex logic, and real-time inventory updates. It enables streamlined workflows, reduces manual processes, and improves customer satisfaction.

OBJECTIVES

The goal of the project is to design and implement a Salesforce solution that:

- Automates order assignment, stock validation, and test-drive reminders.
- Maintains accurate vehicle availability and customer records.
- Enhances customer communication through email alerts.
- Supports business scalability with Apex automation and structured access control.
- Provides insights via dashboards and reports.

PHASE 1: REQUIREMENT ANALYSIS & PLANNING

Understanding Business Requirements:

- Manage vehicles, customers, dealers, orders, test drives, and service requests.
- Prevent invalid orders and maintain clean data.
- Automate reminders and dealer assignments.

Project Scope & Objectives:

- Build custom objects and workflows.
- Implement validation rules and Apex triggers.
- Improve operational tracking with dashboards.

Data Model & Security Model:

- Six custom objects: Vehicle, Dealer, Customer, Order, Test Drive, Service Request.
- Custom profiles, roles, and permission sets ensure secure access.

Stakeholder Mapping:

- Sales Team, Inventory Manager, Service Department, System Admin.

Execution Roadmap:

- Phase-based development: Setup → Build → Automation → Testing → Deployment.

PHASE 2: SALESFORCE DEVELOPMENT – BACKEND & CONFIGURATION

Environment Setup:

- Developer Org created with full access to Setup tools.

Customizations:

- Custom fields, tabs, apps, validation rules.
- Record-triggered flows for dealer assignment and test-drive reminders.

Apex Development:

- Apex Triggers for stock validation and deduction.
- Batch Apex for auto-processing pending orders.
- Scheduled Apex for daily inventory synchronization.

PHASE 3: UI/UX DEVELOPMENT & CUSTOMIZATION

- Custom Lightning App created for easy navigation.
- Page layouts, dynamic forms, and object-specific pages configured.
- Reports and dashboards built for vehicle availability, dealer performance, orders, and service metrics.

PHASE 4: DATA MIGRATION, TESTING & SECURITY

- Data Import Wizard used to load vehicle, customer, and dealer records.
- Field history tracking enabled for Vehicles, Orders, and Customers.
- Duplicate & Matching Rules applied for Customer records.
- Profiles, Roles, Permission Sets configured for controlled access.
- Test cases prepared for order creation, stock validation, reminders, triggers, and flows.

PHASE 5: DEPLOYMENT, DOCUMENTATION & MAINTENANCE

- Deployment done using Change Sets.
- Maintenance strategy includes scheduled jobs, periodic data checks, and debugging via logs.
- Troubleshooting documented for validation errors, automation conflicts, and trigger failures.

CONCLUSION

The WhatNext Vision Motors Salesforce CRM solution significantly improves operational efficiency, automates critical workflows, and enhances customer satisfaction. With strong automation mechanisms, real-time stock management, and structured data models, this CRM provides a scalable foundation for future enhancements such as Experience Cloud, AI recommendations, IoT integration, and ERP synchronization.