WhatNext Vision Motors: Shaping the Future of Mobility with Innovation and Excellence

Project Overview

The WhatNext Vision Motors CRM is designed to manage vehicle sales, customer information, service bookings, and internal workflows in one system.
It provides an organized flow of information across departments, improves customer engagement, and increases operational efficiency through Salesforce automation.

Objectives

The main objectives of the system are to:

- Improve vehicle sales operations
- Speed up service booking and order processing
- Centralize customer and vehicle data
- Automate follow-ups and reminders
- Provide insights through reports and dashboards

Overall, the CRM enhances **customer satisfaction**, **productivity**, and **data-driven decision-making**.

Phase 1: Requirement Analysis & Planning

Understanding Business Requirements

- Manage customer information (buyers, prospects, and service clients)
- Track vehicle inventory, bookings, sales, and service history
- Automate approval processes for purchases and financing
- Ensure accurate test drive scheduling and sales records

Project Scope

- Custom objects for **Vehicle, Booking, Sales Order, Payment, and Test Drive**
- Automated flows for **booking approvals, dealer assignment, and reminders**
- Reports and dashboards for **sales and inventory analysis**

Data Model & Security

- Relationships: **Customer → Booking → Vehicle → Payment**
- Security implementation:
    - Profiles and Roles
    - Sharing Rules
    - Field-Level Security for sensitive data such as vehicle pricing

Stakeholders

- Sales Agents
- Finance Team
- Service Team
- Managers / Admins
- Customers (indirect users)

Execution Roadmap

1. Requirement gathering
2. Data model setup
3. UI and automation development
4. Testing and data migration
5. Deployment and documentation

Phase 2: Salesforce Development – Backend & Configuration

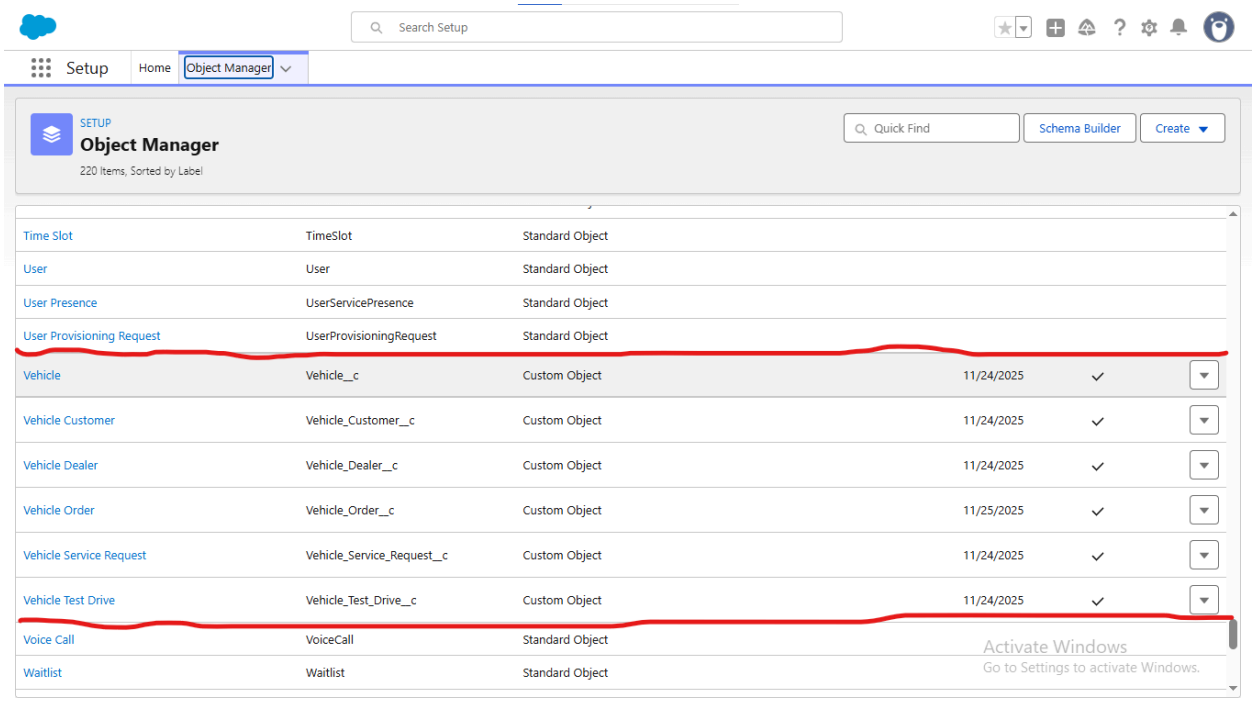
Environment Setup

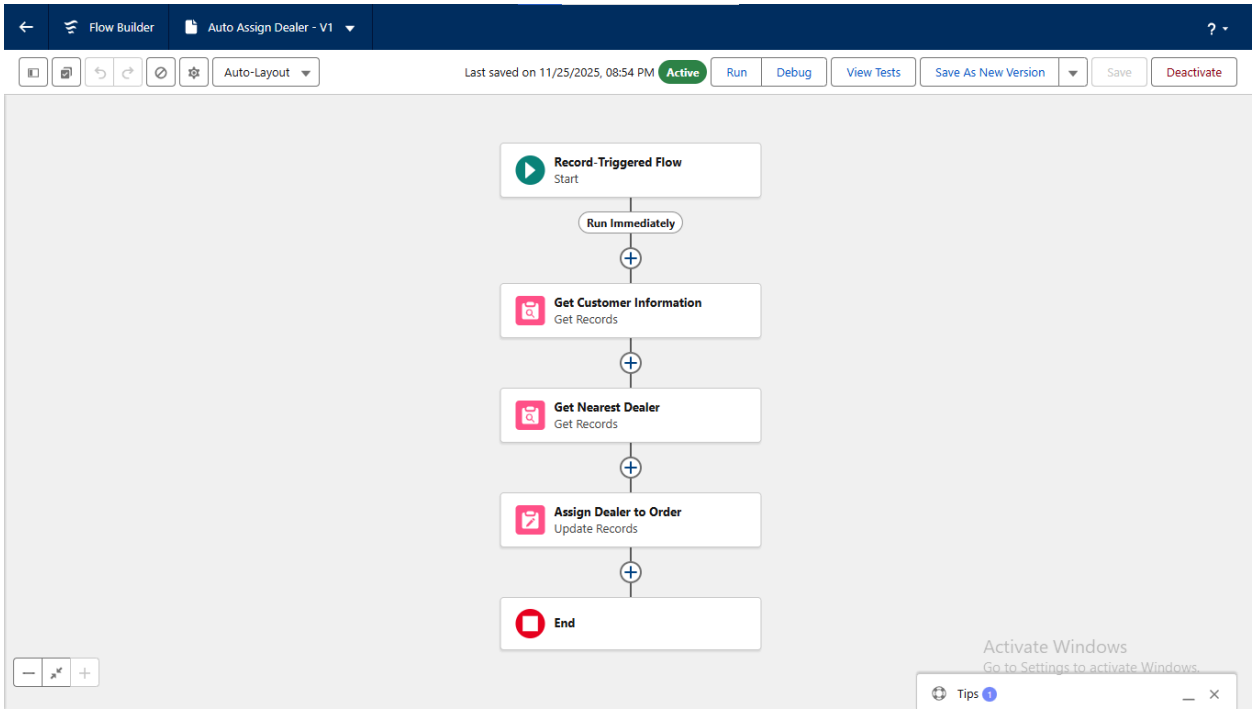
- Salesforce Developer Org
- Organized metadata and custom objects
- Deployment using Change Sets

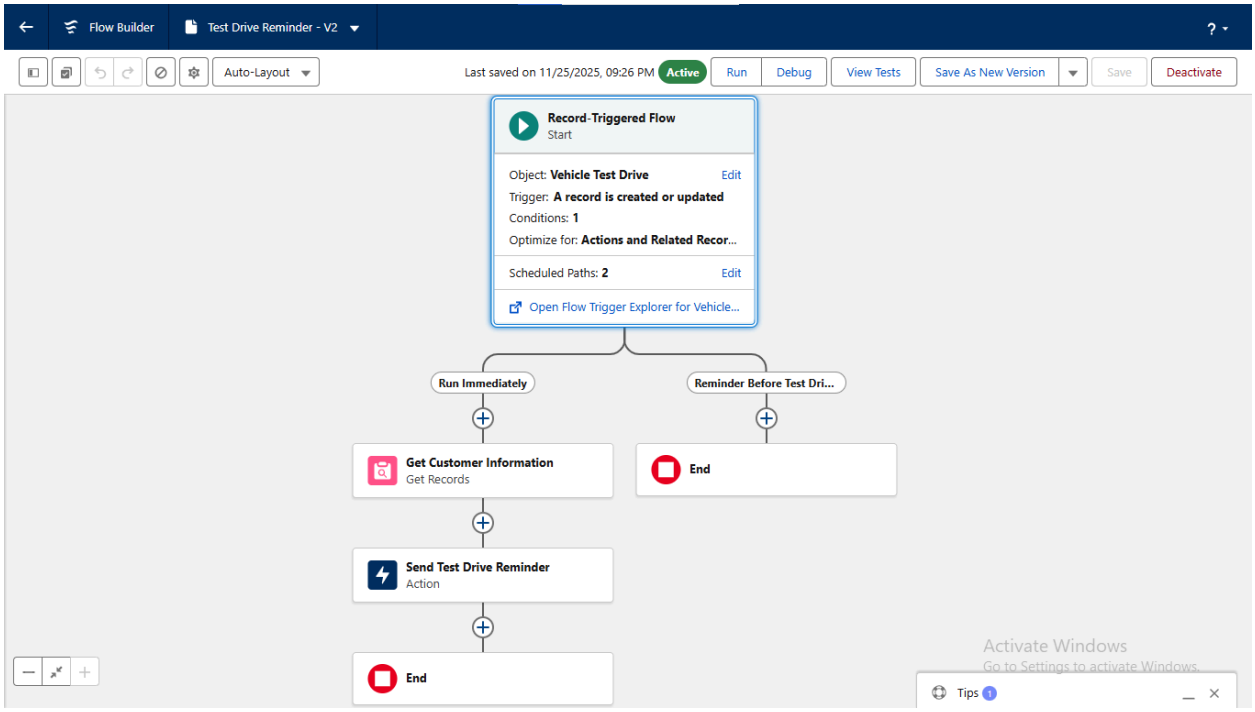
Customizations

- **Custom Objects:** Vehicle, Vehicle Customer, Vehicle Dealer, Vehicle Order, Vehicle Service, Vehicle Test Drive
- **Validation Rules:** Prevent invalid booking dates and incomplete payments
- **Automation:** Salesforce Flows, Workflow Rules, Process Builder
- **Approval Process:** Purchase and financing approval

- **Apex Classes & Triggers:** VehicleOrderBatch, VehicleOrderBatchScheduler, VehicleOrderTrigger, VehicleOrderTriggerHandler







Phase 3: UI/UX Development & Customization

Lightning Application

- Created WhatNext Vision Motors CRM

Page Layouts & Dynamic Forms

- Vehicle record page with pricing and engine details
- Booking page with conditional field visibility

User Management

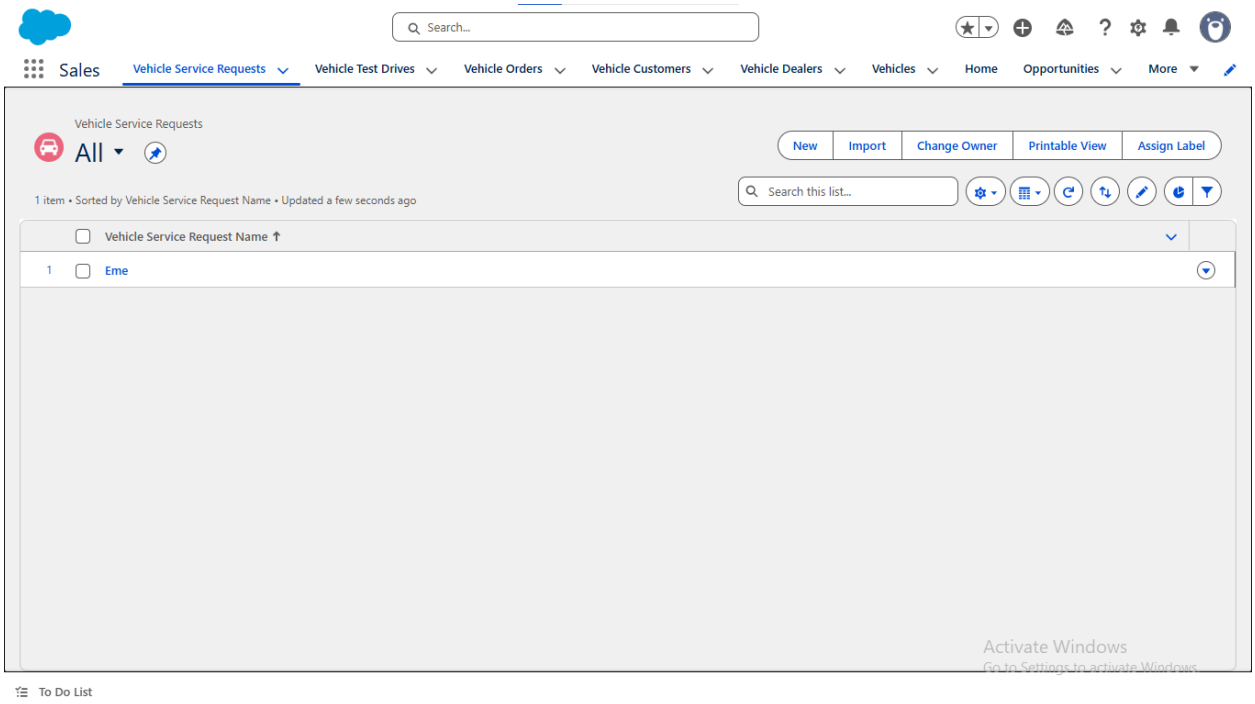
- Profiles: Sales User, Finance User, Admin
- Permission Sets: Payment Manager, Vehicle Editor

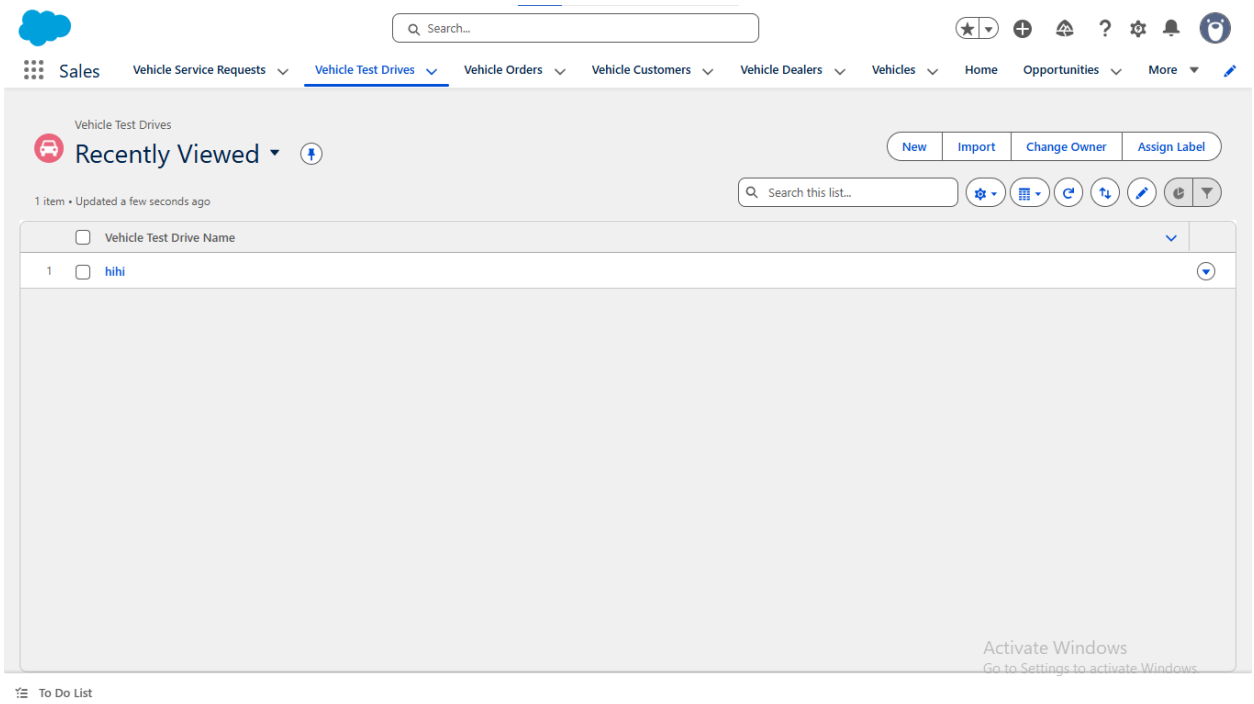
Reports & Dashboards

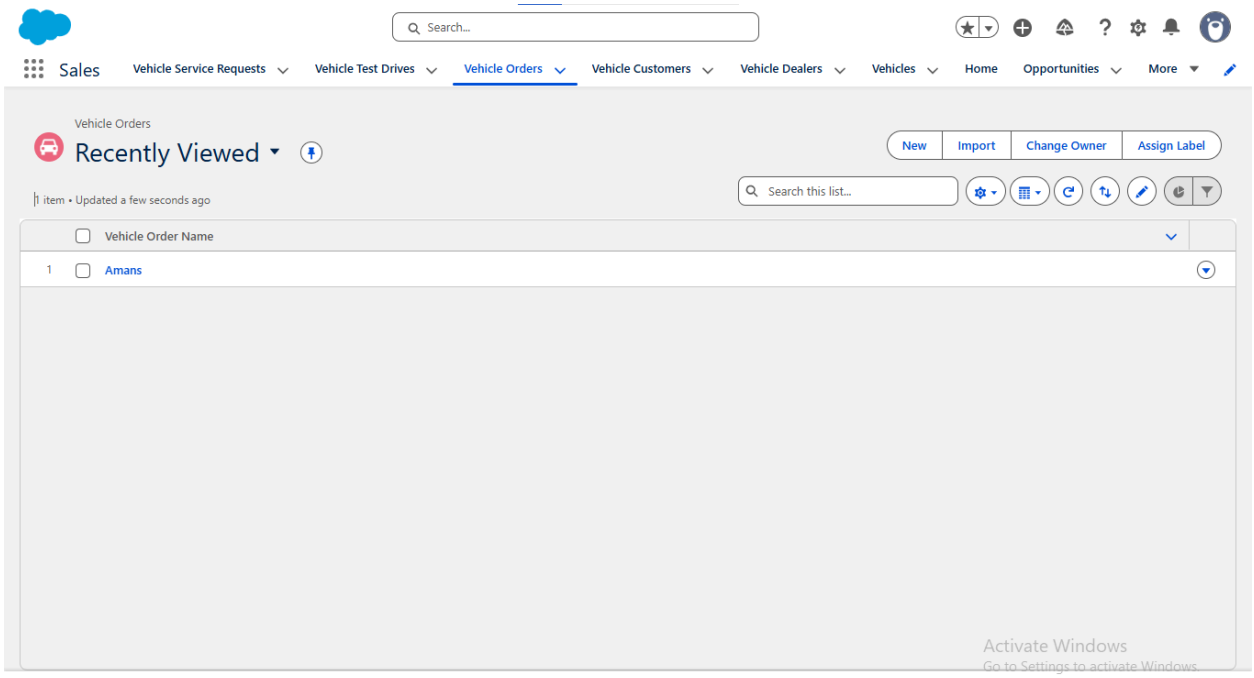
- Sales Performance Dashboard
- Vehicle Inventory Report
- Monthly Booking Summary

Lightning Pages & LWC (Optional)

- Custom home page with quick actions
- Vehicle Availability Checker (LWC)



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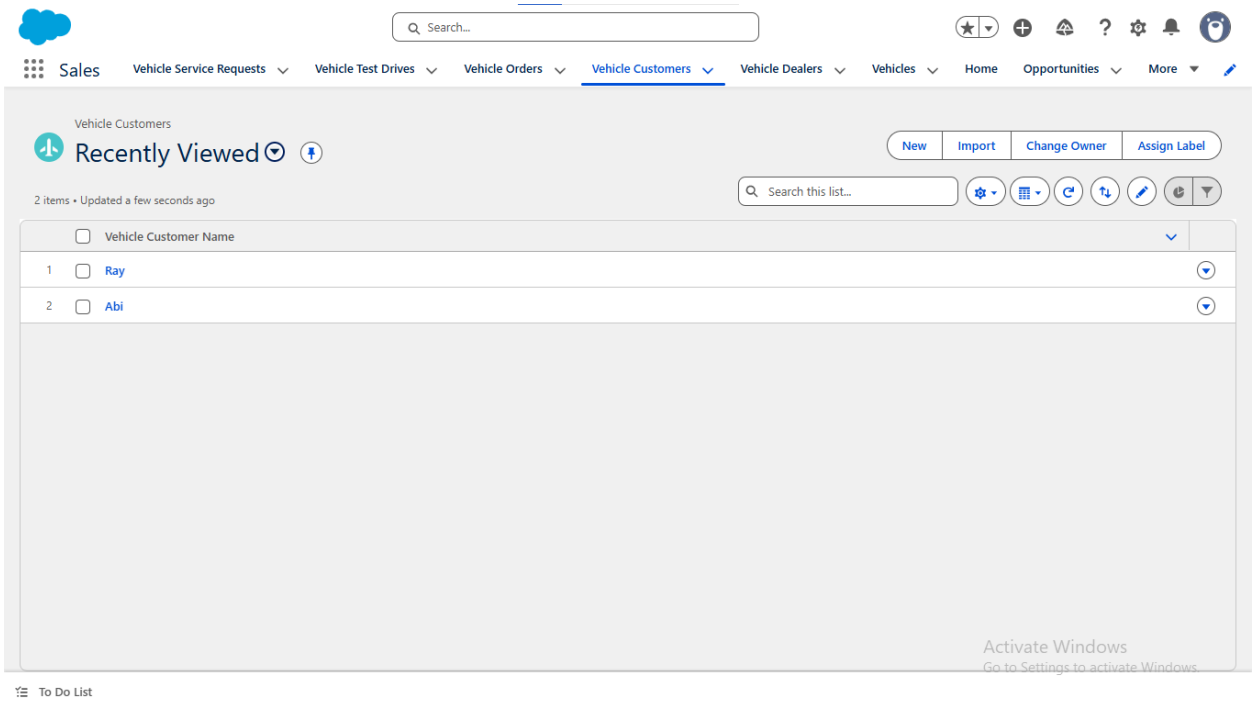
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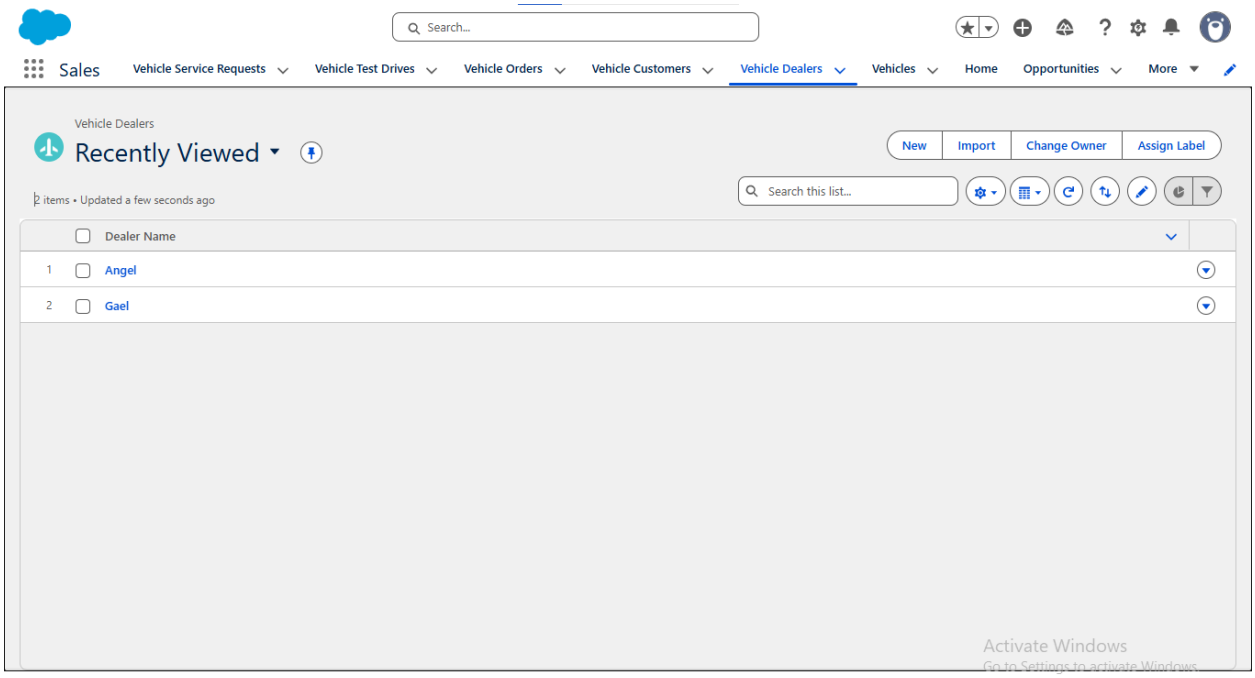
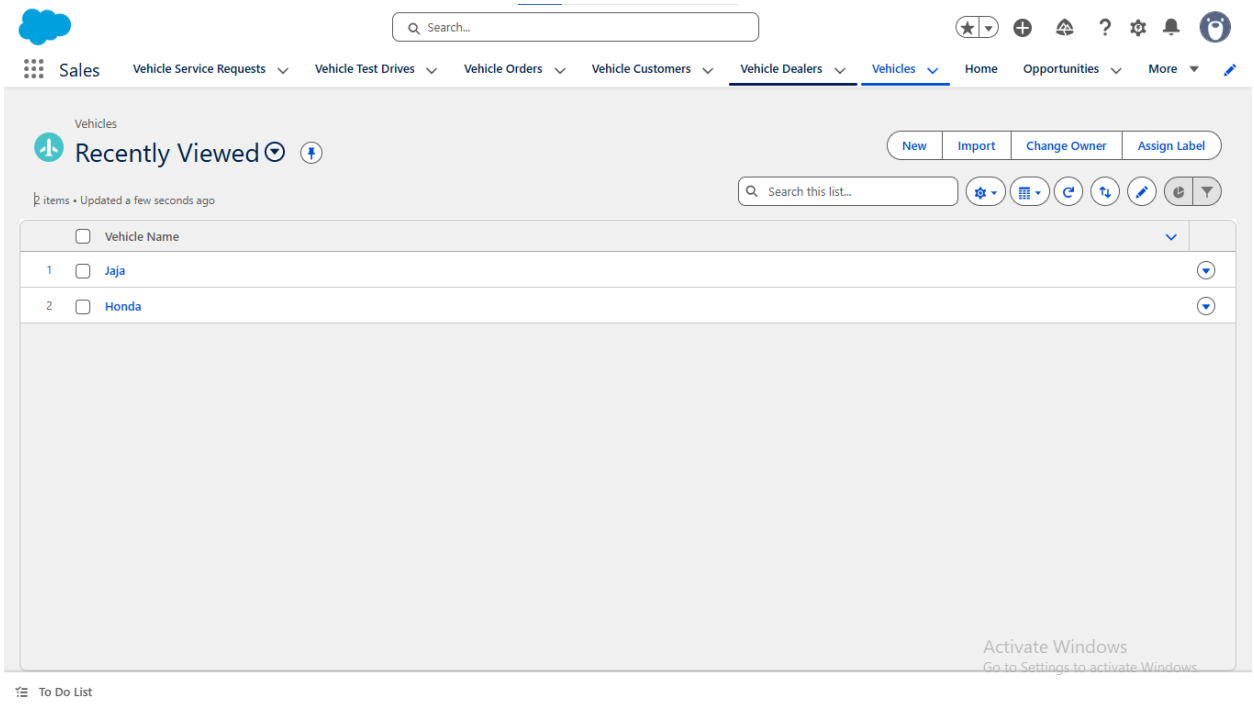




Phase 4: Data Migration, Testing & Security

Data Migration

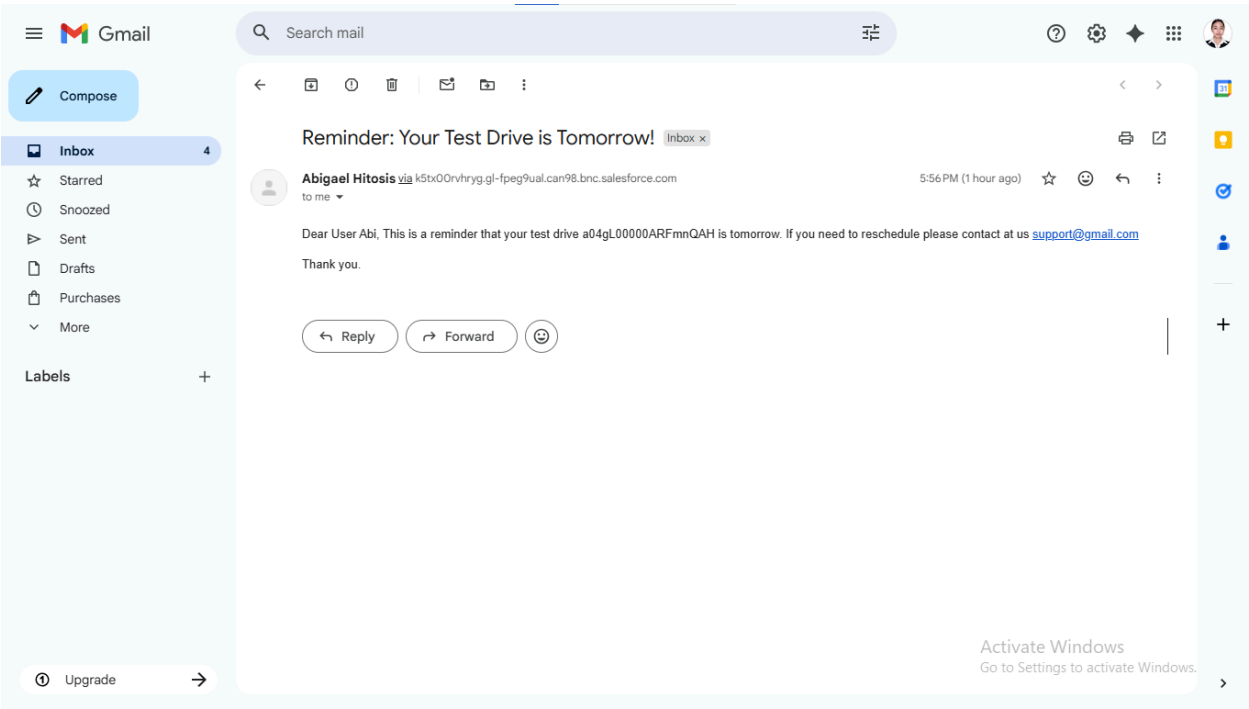
- Data Import Wizard for Customers and Vehicles
- Data Loader for Bookings and Payments

Security Configuration

- Field History Tracking (Vehicle Price, Booking Status)
- Duplicate and Matching Rules for customer records
- Profiles, Roles, Sharing Rules, and Permission Sets

Testing

- Apex Test Classes for triggers and automation
- Test Cases:
    - Booking creation
    - Approval process
    - Payment recording
    - Automated task creation
    - Flow trigger validation



Phase 5: Deployment, Documentation & Maintenance

Deployment

- Change Sets from Sandbox to Production
- Pre-deployment validation

Maintenance

- Regular checks on automation and data accuracy
- Monitoring using Debug Logs and Setup Audit Trail

Troubleshooting Documentation

- Common issues and solutions (flow errors, permission problems)

Conclusion

The WhatNext Vision Motors Salesforce CRM provides a fully automated and centralized system for managing customers, vehicle inventory, bookings, and payments.
By using Salesforce automation, Apex development, secure data management, and custom reporting, the system improves efficiency and enhances overall business performance.