Enhancing Customer Experience and Operational Efficiency with Salesforce at WhatsNext Vision Motors

Abstract:

WhatsNext Vision Motors, a leading name in the automotive industry, has embarked on a Salesforce-based digital transformation journey to redefine its customer engagement and streamline operational workflows. This project focuses on building an intelligent and automated ordering platform that improves customer satisfaction and operational productivity. Through features like smart dealer location suggestions, dynamic stock availability checks, and automated order status updates, the platform aims to address key industry challenges while aligning with customer expectations.

Objective:

The primary objectives of this Salesforce project are:

- To enhance the vehicle ordering experience for customers.

- To eliminate errors related to vehicle stock availability.

- To automate order processing and status updates.

- To reduce the administrative burden on staff and increase organizational efficiency.

Technology Description

Salesforce: Salesforce is a cloud-based Customer Relationship Management (CRM) platform that helps businesses manage customer data, automate processes, and improve service, marketing, and sales operations. It provides point-and-click tools as well as programmatic capabilities (like Apex and Flows) to build custom business solutions.

Custom Objects: Objects in Salesforce are like tables in a database. Custom Objects are created to store specific data. Example:

- Customer__c – Stores customer info

- Product__c – Stores product details

- Order__c – Stores orders

Tabs: Tabs are used to display object data in the Salesforce UI. Example: A tab for Product__c allows users to easily view and manage products.

Custom App: An App in Salesforce is a collection of tabs grouped together for a specific business purpose.

Roles: Roles control the data visibility in Salesforce's role hierarchy. It's used for sharing settings and reporting.

Permission Sets: Permission Sets grant additional permissions to users without changing their profile.

Validation Rules: Validation Rules ensure data entered meets business criteria. Example:

- Email must contain @gmail.com

- Stock cannot be negative

Email Templates: Predefined formats for sending emails to customers or users.

Detailed Execution of Project Phases

1. Developer Org Setup

- A Salesforce Developer Org was created using https://developer.salesforce.com/signup.

- The account was verified, password set, and access was granted to the Salesforce Setup page.

2. Custom Object Creation Five custom objects were created to store business-critical data:

- Vehicle Customer – Stores customer info like email, phone.

- Vehicle Product – Stores product catalog details like type, price, and stock.

- Vehicle Order – Tracks stock quantity and warehouse location.

Steps followed:

- Navigated to Setup → Object Manager → Create → Custom Object

- Provided label, name, and enabled reports/search

- Saved and created Tabs for each object

3. Creating the Lightning App

- A custom Lightning App named **WhatsNext Vision Motors** Threads was created.

- Included tabs: **WhatsNext Vision Motors** Customer, Order, Dealers, Vehicles, Test Drives, Service requests, Reports, etc.

- Assigned to the System Administrator profile.

4. Validation Rules To ensure accurate data entry and enforce business logic, the following validation rules were applied:

- **Order Object**: Prevents saving if Total_Amount__c <= 0.

  - *Error:* "Please Enter Correct Amount"

- **Customer Object**: Validates email contains @gmail.com.

  - *Error:* "Please fill Correct Gmail"

Project Explanation with Real-Time Examples

Use Case 1: Smart Dealer Suggestion

- A customer from Hyderabad enters their address on the ordering portal.

- The system uses geolocation APIs to detect the nearest available dealer (e.g., Jubilee Hills Motors).

- This dealer is auto-assigned to the order, streamlining logistics and communication.

Use Case 2: Stock Availability Check

- A customer attempts to place an order for "Model X Sedan."

- The system checks real-time stock records.

- If "Model X Sedan" is out of stock, the system blocks the order and prompts the customer to choose an alternative.
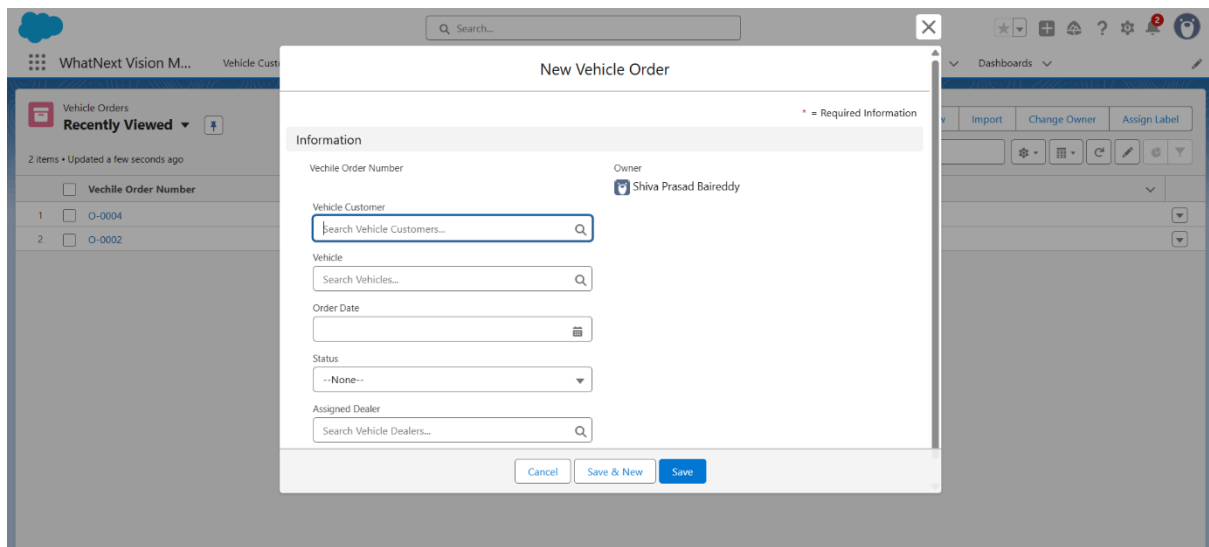
Use Case 3: Order Status Automation

- 100 orders are placed over the weekend.

- A scheduled Apex job runs every morning to verify stock.

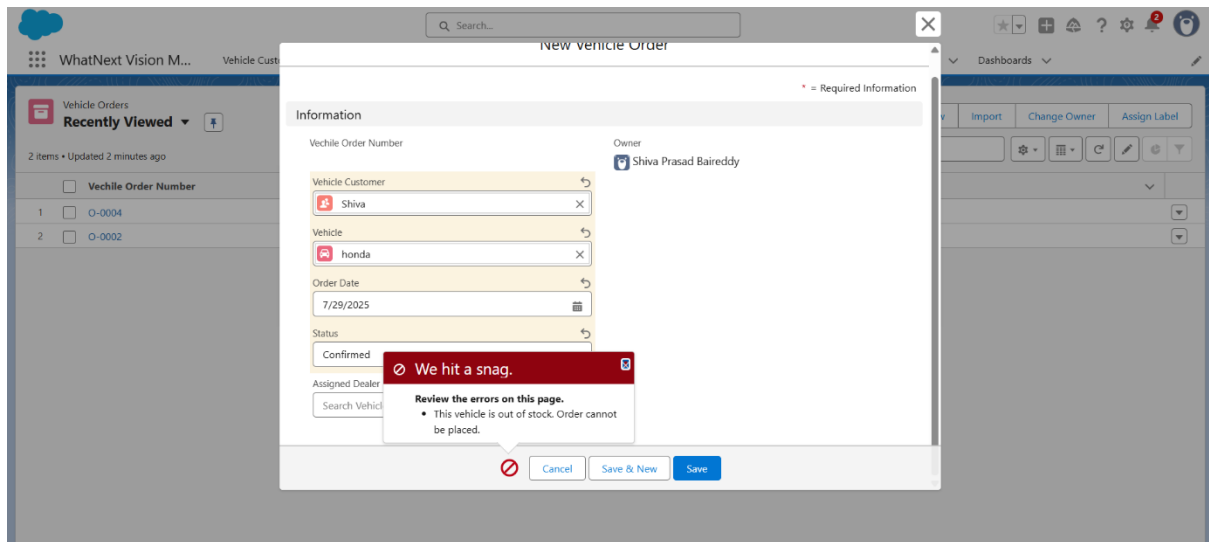- 30 orders are marked as "Pending" due to unavailable models, and 70 as "Confirmed."
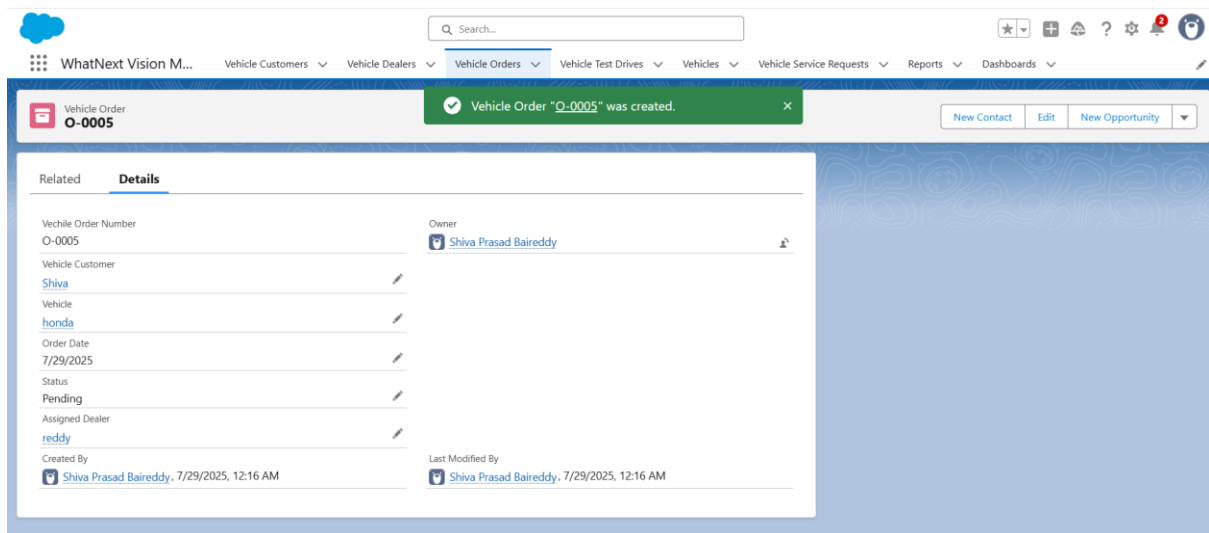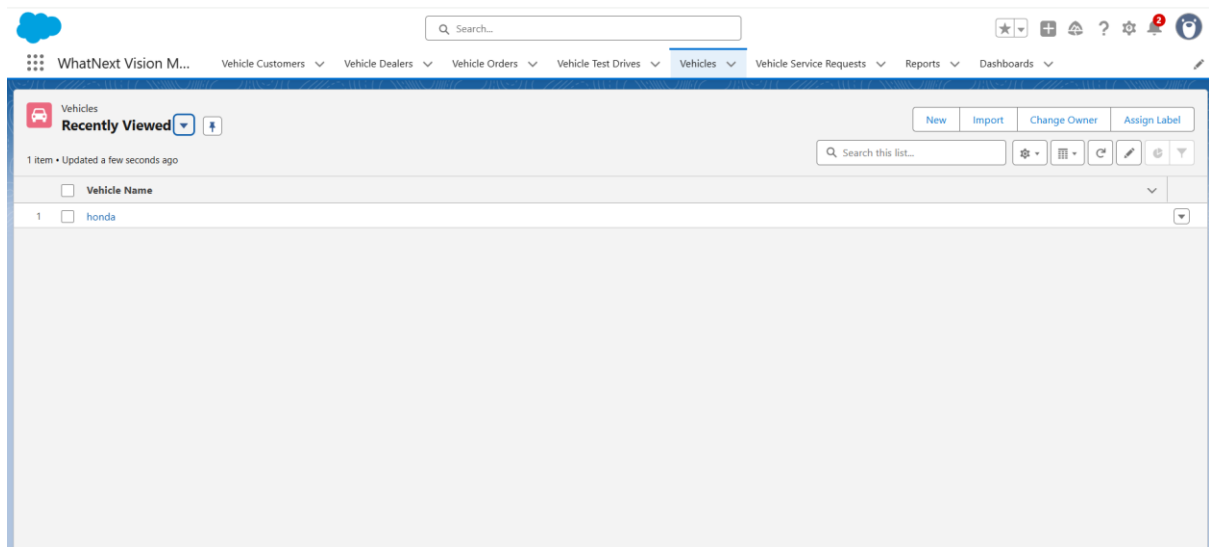
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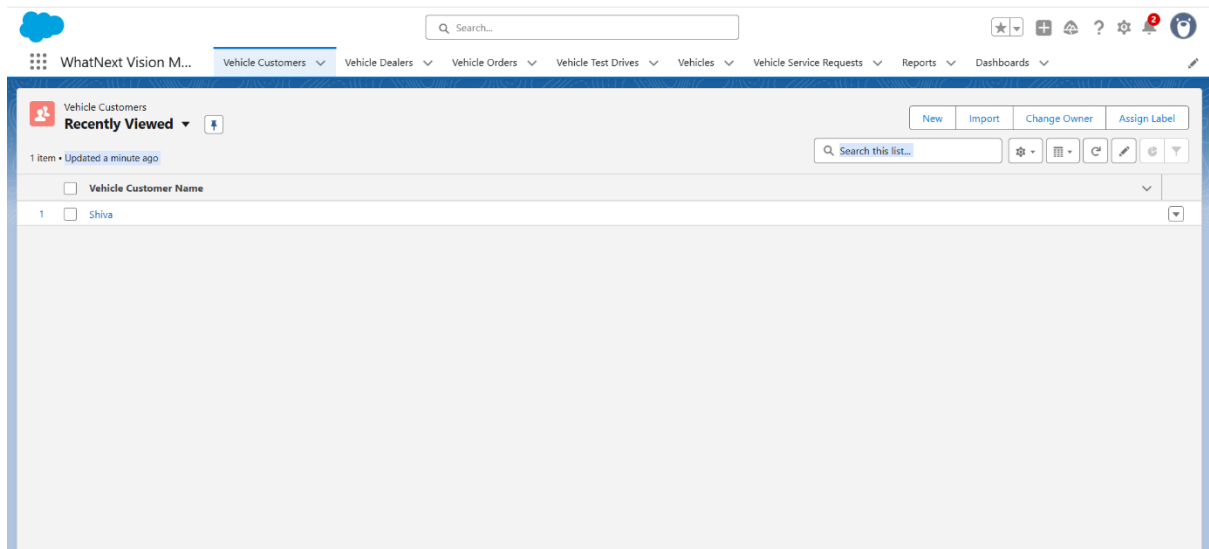
Lightning App Tabs View

Customer Order Form with Auto-Dealer Selection

Error Notification for Out-of-Stock Vehicle

Order Record with Dynamic Status Update

List of vehicles

Conclusion:

The implementation of this Salesforce-based ordering platform has significantly improved the customer experience at WhatsNext Vision Motors. The system ensures accurate stock checks, automated dealer assignment, and timely status updates, which collectively reduce errors, enhance transparency, and streamline operations.

Future Scope:

- Integration with logistics partners for delivery tracking.

- Real-time SMS/Email alerts for order status.

- AI-based prediction models for inventory planning.

- Expansion to include service appointments and post-sale services.

- Mobile app support for customer self-service.