

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

## Project Overview

WhatNext Vision Motors, a rising innovator in the automotive industry sought to elevate its customer interactions and streamline internal operations through the implementation of customized Salesforce CRM solution. The primary focus of the project was to streamline vehicle order management, ensure accurate dealer assignment, and automation.

The manual ordering process brought difficulties, the solution was to create features that enhance vehicle ordering workflow. The system intelligently recommends the nearest dealer based on the customer's location, integrates real-time stock validation, minimizing errors and ensuring a smoother, more reliable experience. Automated status updates for bulk orders further strengthen operational accuracy that improves order tracking and customer communication.

## Objectives

The main objective of this project was to implement and develop a customized salesforce CRM for WhatNext Vision Motors to enhance the customer experience and streamlining its operational processes.

By developing a centralized system to manage order creation, dealer assignment, and stock validation, the project aims to:

- **Automate Order and Dealer Assignment** by automatically assigning the nearest dealer based on customer's location.
- **Prevent Out-of-Stock Orders** by restricting the customer to place an order for the vehicle that is unavailable.
- **Send Test Drives Reminder** through automated emails that notify customers of a scheduled test drive.
- **Improve Customer Engagement and Experience** with the use of Lightning App and Dynamic Forms which makes clean and intuitive user interface.
- **Scalability of Backend** through Apex Classes for scheduled batch jobs to automate stock updates and order confirmations in bulk.

## Phase 1: Requirement Analysis and Planning

The initial phase of the WhatNext Vision Motors project was to focus on planning the business needs and translates it into system requirements using the capabilities of Salesforce environment. The goal is to develop a CRM that supports vehicle ordering workflows.

### Business Requirements

The following are the business requirements:

- Centralized data of vehicle, dealers, and orders.
- The vehicle stocks are automatically updated when an order is being placed.
- Dealers were automatically assigns based on customers location.
- Automatically notify customers about their test drives scheduled.
- Monitor vehicle service requests.
- Automation of key workflows to reduce human intervention.

### Defining Project Scope

To meet business needs, the system was designed to have:

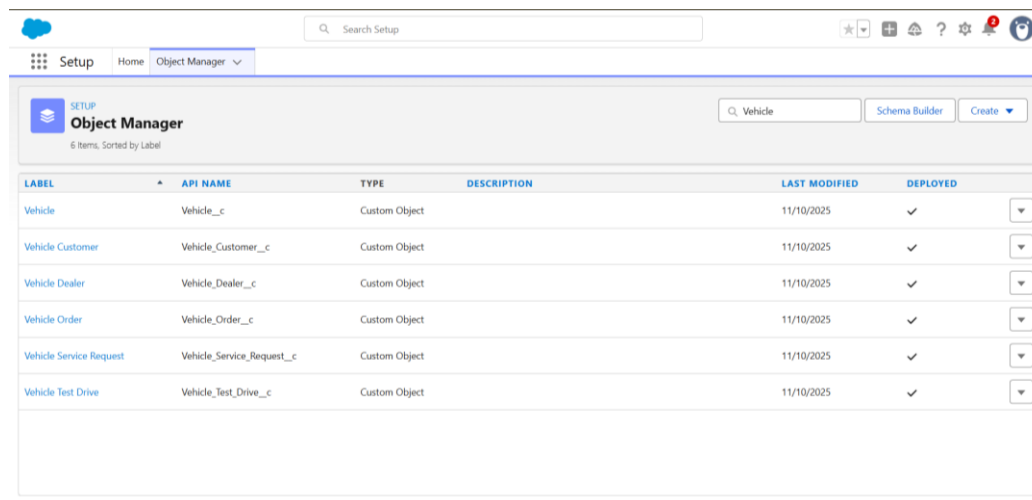
- Custom fields and objects for managing vehicles, orders, customers, dealers, test drives, and service requests.
- Record-triggered flows to automatically assigns dealer and send test drives notification.
- Apex triggers for stock availability and updates.
- Batch Apex to process pending orders based on stock availability.

### Data Model

Six custom objects were created to reflect business structure:

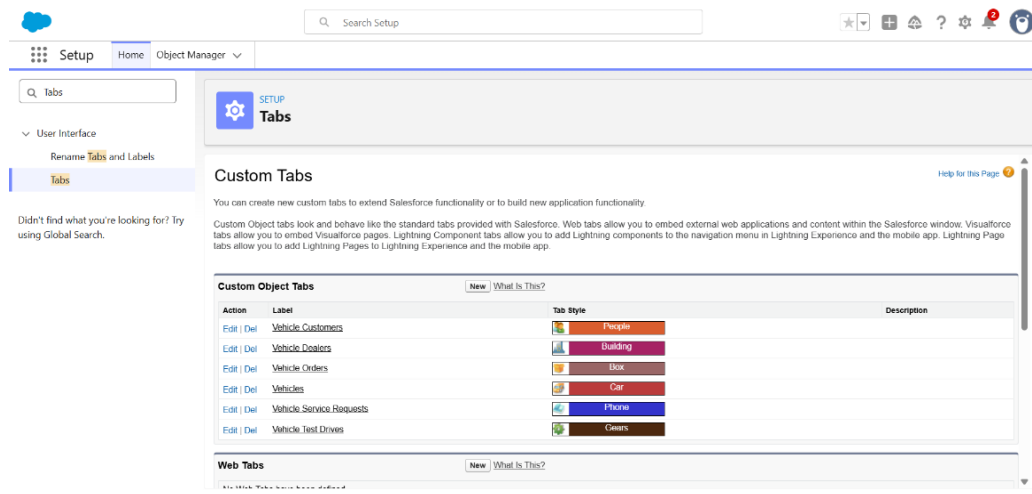
Object Name	Purpose
Vehicle__c	Stores vehicle details
Vehicle_Dealer__c	Stores authorized dealer info
Vehicle_Customer__c	Stores customer details
Vehicle_Order__c	Tracks vehicle orders
Vehicle_Test_Drive__c	Tracks test drives
Vehicle_Service_Request__c	Manages customer's service requests

These objects are interconnected using lookup relationship to ensure data integrity.



The screenshot shows the Salesforce Object Manager interface. At the top, there's a search bar with 'Vehicle' entered. Below the search bar, there's a table with columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The table lists six custom objects, all created on 11/10/2025 and deployed.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Vehicle	Vehicle__c	Custom Object		11/10/2025	✓
Vehicle Customer	Vehicle_Customer__c	Custom Object		11/10/2025	✓
Vehicle Dealer	Vehicle_Dealer__c	Custom Object		11/10/2025	✓
Vehicle Order	Vehicle_Order__c	Custom Object		11/10/2025	✓
Vehicle Service Request	Vehicle_Service_Request__c	Custom Object		11/10/2025	✓
Vehicle Test Drive	Vehicle_Test_Drive__c	Custom Object		11/10/2025	✓



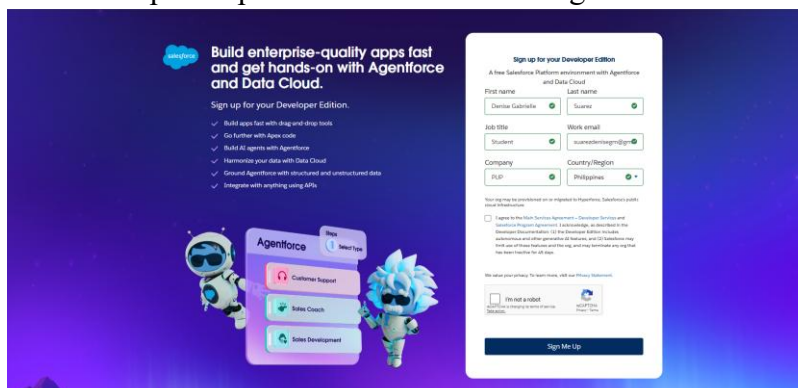
The screenshot shows the 'Custom Tabs' configuration page in Salesforce. It includes a table for 'Custom Object Tabs' with columns: Action, Label, and Tab Style. The table lists five tabs: Vehicle Customers (People), Vehicle Dealers (Building), Vehicle Orders (Box), Vehicles (Car), and Vehicle Service Requests (Phone). There is also a section for 'Web Tabs' at the bottom.

Action	Label	Tab Style
Edit   Del	Vehicle Customers	People
Edit   Del	Vehicle Dealers	Building
Edit   Del	Vehicle Orders	Box
Edit   Del	Vehicles	Car
Edit   Del	Vehicle Service Requests	Phone
Edit   Del	Vehicle Test Drives	Camera

## Phase 2: Salesforce Development - Backend & Configurations

- Setup Environment and DevOps Workflow

The development process starts with creating Salesforce Developer Org.



- **Environment:** Salesforce Lightning Experience (Developer Edition)
- **User Profiles/Roles:** Standard profiles were used.

- **Customization of Objects, Fields, Validation Rules, Automation**

- Six custom objects were created to store relevant business data. This includes:
  - **Vehicle** - Stores vehicle details.
  - **Vehicle Dealer** - Stores authorized dealer info.
  - **Vehicle Customer** - Stores customer details.
  - **Vehicle Order** - Tracks vehicle purchases.
  - **Vehicle Test Drive** - Tracks test drive schedule.
  - **Vehicle Service Request** - Tracks vehicle servicing requests.
- The following custom objects were configured to support the business flow:
  - **Vehicle** – Store vehicle name, model, quantity, price, and status.
    - Dealer → Lookup Relationship
  - **Vehicle Dealer** – Store dealer name, location, code, phone, and email.
  - **Vehicle Order** – Store order date and status.
    - Customer → Lookup Relationship
    - Vehicle → Lookup Relationship
  - **Vehicle Customer** – Store customer name, email, phone, address, and preferred vehicle type.
  - **Vehicle Test Drive** – Store test drive date and status.
    - Customer → Lookup Relationship
    - Vehicle → Lookup Relationship
  - **Vehicle Service Request** – Store service date, issue description, and status.
    - Customer → Lookup Relationship
    - Vehicle → Lookup Relationship

SETUP > OBJECT MANAGER

**Vehicle Dealer**

Details

**Fields & Relationships**  
8 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Created By	CreatedById	Lookup(User)
Dealer Code	Dealer_Code__c	Auto Number
Dealer Location	Dealer_Location__c	Text(50)
Dealer Name	Name	Text(80)
Email	Email__c	Email
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User/Group)
Phone	Phone__c	Phone

SETUP > OBJECT MANAGER

**Vehicle Order**

Details

**Fields & Relationships**  
9 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Assigned Dealer	Assigned_Dealer__c	Lookup(Vehicle Dealer)
Created By	CreatedById	Lookup(User)
Last Modified By	LastModifiedById	Lookup(User)
Order Date	Order_Date__c	Date
Order Number	Name	Auto Number
Owner	OwnerId	Lookup(User/Group)
Status	Status__c	Picklist
Vehicle	Vehicle__c	Lookup(Vehicle)
Vehicle Customer	Vehicle_Customer__c	Lookup(Vehicle Customer)

SETUP > OBJECT MANAGER

### Vehicle

Details

**Fields & Relationships**  
9 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Created By	CreatedById	Lookup(User)
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Price	Price__c	Currency(18, 0)
Status	Status__c	Picklist
Stock Quantity	Stock_Quantity__c	Number(18, 0)
Vehicle Dealer	Vehicle_Dealer__c	Lookup(Vehicle Dealer)
Vehicle Model	Vehicle_Model__c	Picklist
Vehicle Name	Name	Text(80)

SETUP > OBJECT MANAGER

### Vehicle Customer

Details

**Fields & Relationships**  
8 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Address	Address__c	Text(60)
Created By	CreatedById	Lookup(User)
Customer Name	Name	Text(30)
Email	Email__c	Email
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Phone	Phone__c	Phone
Preferred Vehicle Type	Prefer__c	Picklist

SETUP > OBJECT MANAGER

### Vehicle Service Request

Details

**Fields & Relationships**  
9 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Created By	CreatedById	Lookup(User)
Issue Description	Issue_Description__c	Text(60)
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Service Date	Service_Date__c	Date
Service Request Name	Name	Text(30)
Status	Status__c	Picklist
Vehicle	Vehicle__c	Lookup(Vehicle)
Vehicle Customer	Vehicle_Customer__c	Lookup(Vehicle Customer)

SETUP > OBJECT MANAGER

### Vehicle Test Drive

Details

**Fields & Relationships**  
8 items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE
Created By	CreatedById	Lookup(User)
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Status	Status__c	Picklist
Test Drive Date	Test_Drive_Date__c	Date
Test Drive Name	Name	Text(30)
Vehicle	Vehicle__c	Lookup(Vehicle)
Vehicle Customer	Vehicle_Customer__c	Lookup(Vehicle Customer)

## Validation Rules

- **Out-of-stock Blocker:** Prevent placing an order for out-of-stock vehicle.

WhatNext Vision Motors

Vehicle Orders

Recently Viewed

6 items • Updated a few seconds ago

1 ☐ Order Number

2 ☐ O-0012

3 ☐ O-0006

4 ☐ O-0005

5 ☐ O-0004

6 ☐ O-0003

7 ☐ O-0002

New Vehicle Order

\* = Required Information

Information

Order Number

Owner  
Denise Gabrielle Suarez

Vehicle Customer  
Jane Air

Vehicle  
Honda

Order Date  
11/18/2025

Status  
Pending

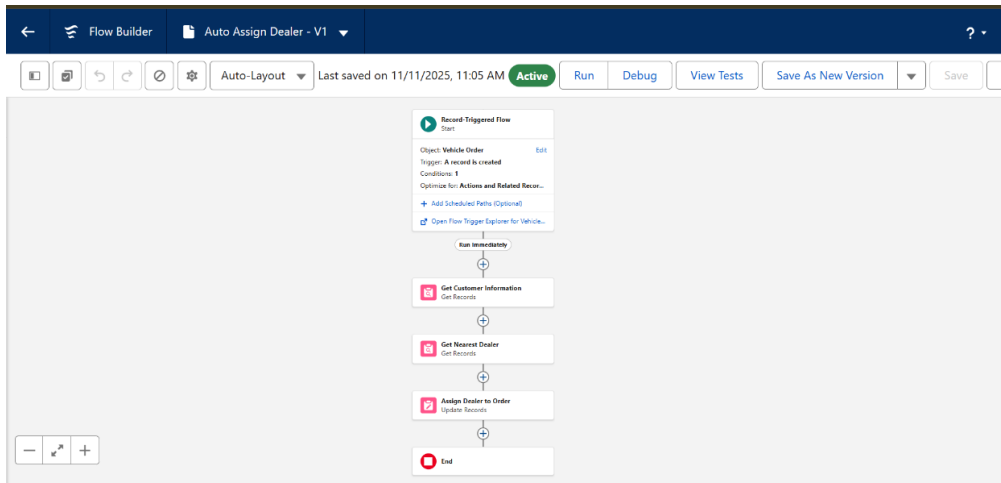
Assigned Dealer  
Search Vehicle Dealers...

We hit a snag.  
Review the errors on this page.  
• This vehicle is out of stock. Order cannot be placed.

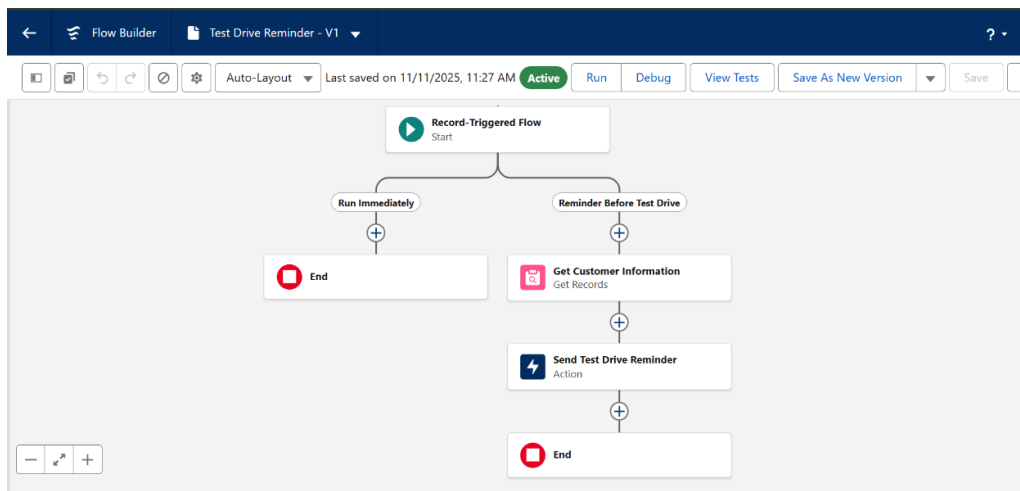
Cancel Save & New Save

## Automation

- **Flows (Record-Triggered)**
  - Auto Assign the nearest dealer based on customer's location using record-triggered flow.



- Test drive reminder flow to send an email using send emails action of record trigger flow.



The screenshot shows the configuration for the 'Send Email' action. The 'Subject' field is set to 'Reminder: Your Test Drive is Tomorrow!'. The 'Body' field is set to a text template: 'Dear User ({{Get\_Customer\_Information.Name}}), This is a reminder that your test drive ({{Record.Id}}) is scheduled tomorrow. If you want to reschedule, please contact us at wvmotorssupport@gmail.com. Thank you.' The font is set to 'Salesforce Sans' and the size is '12'. The 'View as Rich Text' option is selected.

## Apex Classes and Triggers

- **Apex Classes** were written to modularize the trigger logic and support backend automation:
  - `VehicleOrderTriggerHandler` handles stock checks and updates in the trigger.
  - `VehicleOrderBatch` checks for pending orders and confirms them if stock is available.
  - `VehicleOrderBatchScheduler` schedules the batch job to run daily at 12 PM.

Open

Entity Type	Entities		Related		
Entity Type	Name	Namespace	Name	Extent	Direction
Classes	DeveloperEditionUtils	devedapp			
Triggers	DeveloperEditionUtilsT...	devedapp			
Pages	PostInstallScript	devedapp			
Page Components	PostInstallScriptTest	devedapp			
Objects	VehicleOrderTriggerHa...				
Static Resources	VehicleOrderBatch				
Packages	VehicleOrderBatchSch...				

Open

☐ Filter Filter the repository (\* = any string)

☐ Hide Managed Packages

Refresh

- **Apex Trigger** was written on the Order object to perform stock availability validation and order status update logic (Pending or Confirmed).

Open

Entity Type	Entities		Related		
Entity Type	Name	Namespace	Name	Extent	Direction
Classes	VehicleOrderTrigger				
Triggers					
Pages					
Page Components					
Objects					
Static Resources					
Packages					

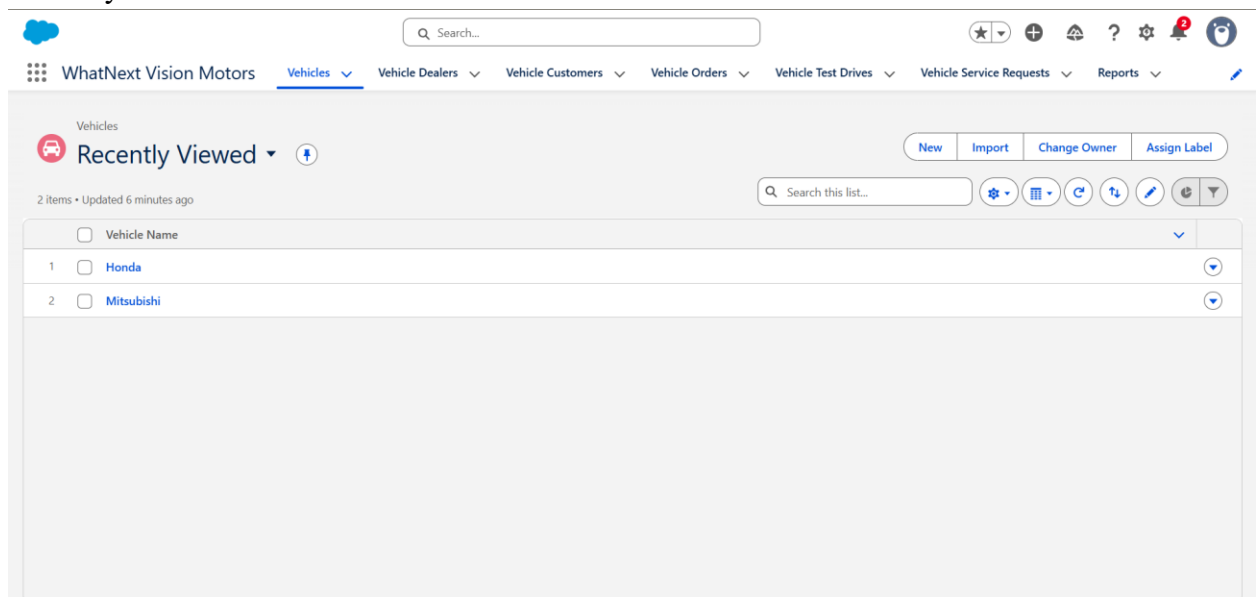
☐ Open ☐ Filter Filter the repository (\* = any string) ☐ Hide Managed Packages

## Phase 3: UI/UX Development & Customization

### Lightning App Setup through App Manager

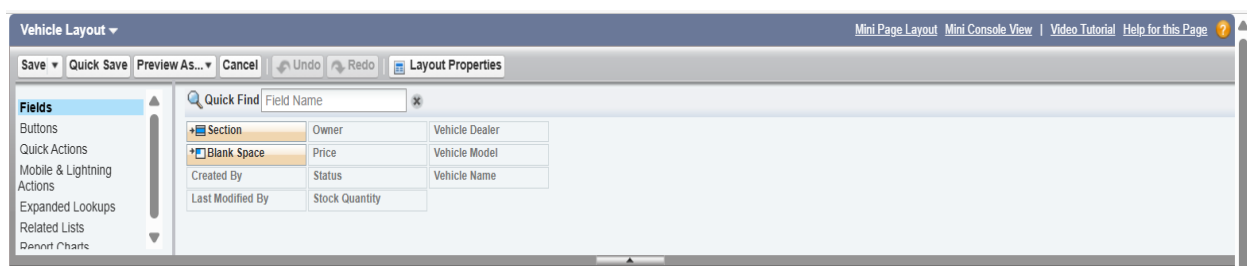
A custom Lightning App titled “WhatNext Vision Motors” was created using App Manager. This app includes relevant custom tabs like Vehicles, Dealers, Orders, Customers, Test Drives, and Service Requests for easy navigation.

- Lightning App: *WhatNext Vision Motors*
- Tabs: Vehicles, Vehicle Dealers, Vehicle Customers, Vehicle Orders, Vehicle Test Drives, Vehicle Service Requests
- Used Dynamic Forms to store records



### Page Layouts and Dynamic Forms

Page Layouts were customized to ensure clean and intuitive UI. Dynamic forms were used to place fields directly on the Lightning Record Page.





WhatNext Vision Motors

Search...

VehiclesVehicle DealersVehicle CustomersVehicle Orders

Vehicle Test Drive

Test3

Related

Details

Test Drive Name

Test3

Owner

Denise Gabrielle Suarez

Vehicle Customer

John Doe

Vehicle

Mitsubishi

Test Drive Date

11/12/2025

Status

Scheduled

Created By

Denise Gabrielle Suarez

11/11/2025, 2:50 AM

Last Modified By

Denise Gabrielle Suarez

11/11/2025, 2:50 AM

WhatNext Vision Motors

Search...

VehiclesVehicle DealersVehicle CustomersVehicle Orders

Vehicle

Honda

Related

Details

Vehicle Name

Honda

Owner

Denise Gabrielle Suarez

Vehicle Model

Sedan

Stock Quantity

1

Price

\$1,500,000

Vehicle Dealer

Kristine Martinez

Status

Available

Created By

Denise Gabrielle Suarez

11/10/2025, 6:48 PM

Last Modified By

Denise Gabrielle Suarez

11/10/2025, 6:48 PM

WhatNext Vision Motors

Search...

VehiclesVehicle DealersVehicle CustomersVehicle Orders

Vehicle Customer

John Doe

Related

Details

Customer Name

John Doe

Owner

Denise Gabrielle Suarez

Email

mgg@fisuarez@gmail.com

Phone

123456789

Address

California

Preferred Vehicle Type

Sedan

Created By

Denise Gabrielle Suarez

11/10/2025, 6:42 PM

Last Modified By

Denise Gabrielle Suarez

11/10/2025, 11:27 PM

WhatNext Vision Motors

Search...

VehiclesVehicle DealersVehicle CustomersVehicle Orders

Vehicle Order

O-0012

Related

Details

Order Number

O-0012

Owner

Denise Gabrielle Suarez

Vehicle Customer

John Doe

Vehicle

Honda

Order Date

11/18/2025

Status

Pending

Assigned Dealer

Kristine Martinez

Created By

Denise Gabrielle Suarez

11/11/2025, 7:46 AM

Last Modified By

Denise Gabrielle Suarez

11/11/2025, 7:46 AM

WhatNext Vision Motors

Search...

VehiclesVehicle DealersVehicle CustomersVehicle Orders

Vehicle Dealer

Kristine Martinez

Related

Details

Dealer Name

Kristine Martinez

Owner

Denise Gabrielle Suarez

Dealer Location

California

Dealer Code

DC-0001

Phone

123456789

Email

kcm@gmail.com

Created By

Denise Gabrielle Suarez

11/10/2025, 6:44 PM

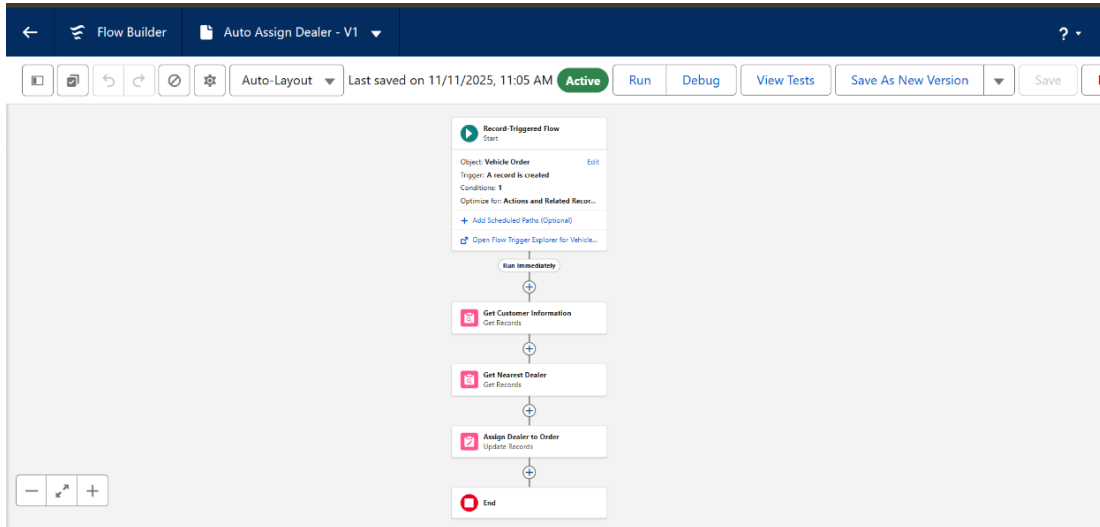
Last Modified By

Denise Gabrielle Suarez

11/10/2025, 11:27 PM

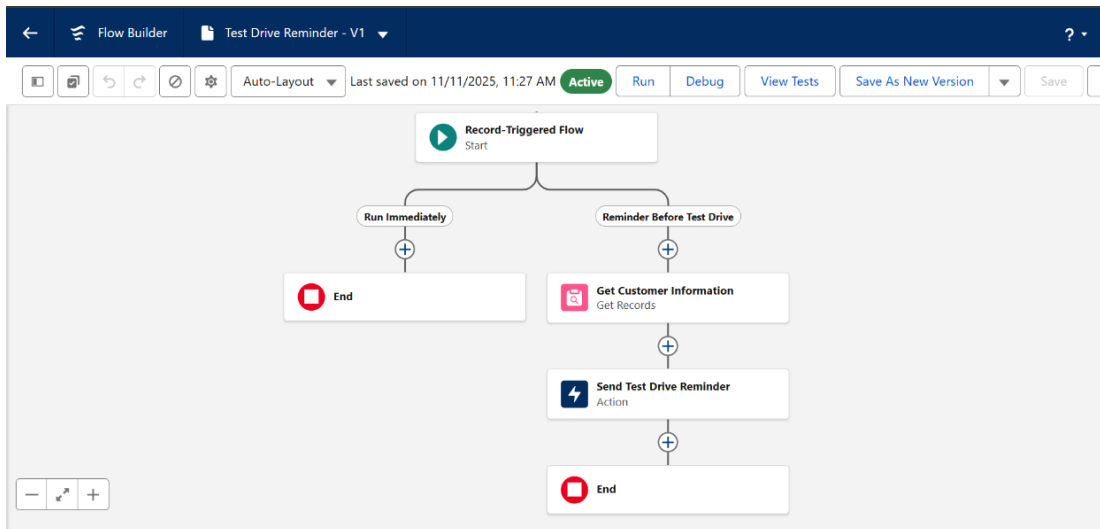
## Flow 1: Auto Assign Dealer

This flow runs on Vehicle\_Order\_c creation and fetches customer's address from Get Customer Information, Get Nearest Dealer and Assigns that Dealer to the Order.



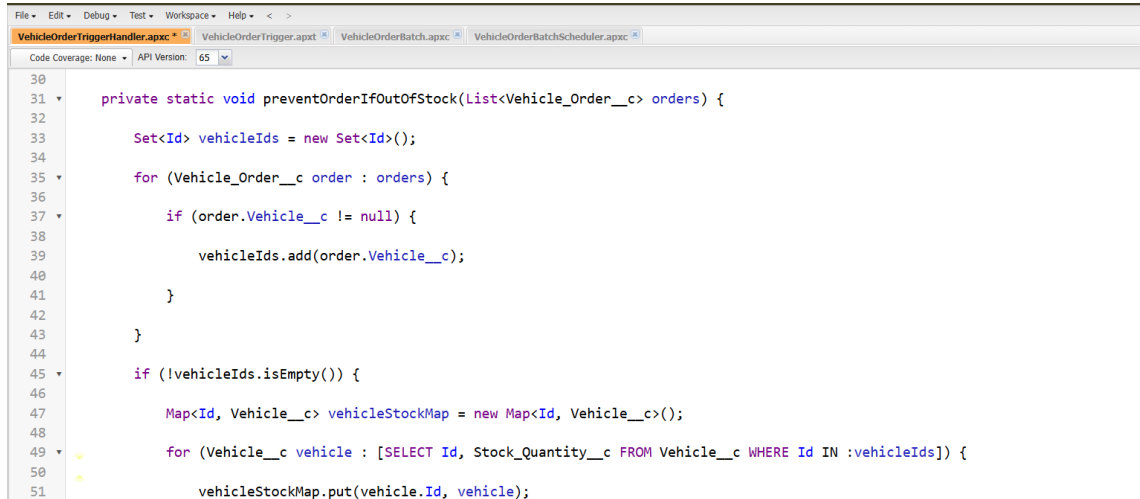
## Flow 2: Test Drive Reminder

This flow runs on Vehicle\_Test\_Drive\_c creation/update and sends email the day before the scheduled test drive.

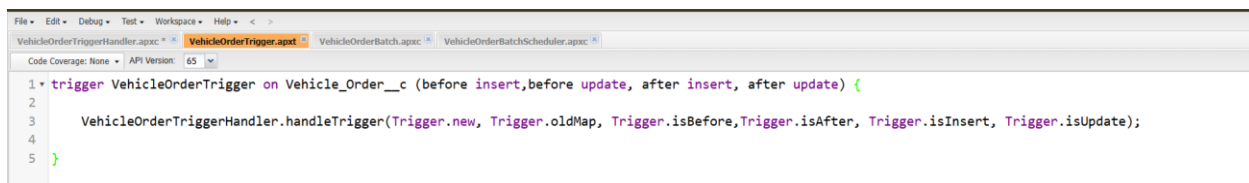


## Apex Trigger and Handler

- Apex trigger named *VehicleOrderTrigger* while handler is *VehicleOrderTriggerHandler*.
  - The *VehicleOrderTriggerHandler* prevents out-of-stock orders and updates stock when the status is confirmed.



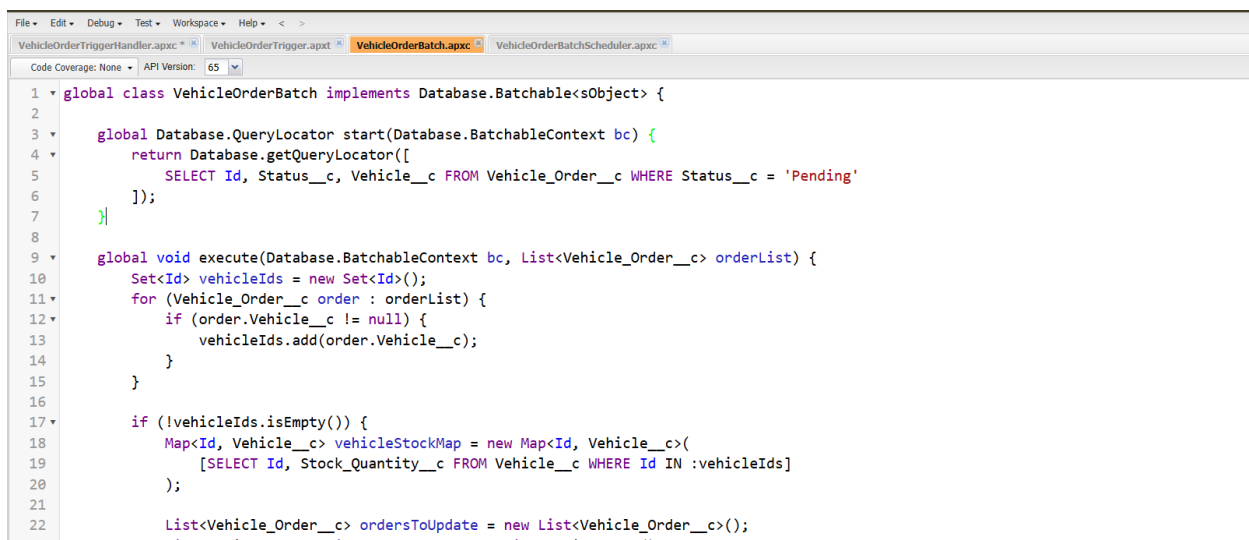
```
30
31 private static void preventOrderIfOutOfStock(List<Vehicle_Order__c> orders) {
32
33     Set<Id> vehicleIds = new Set<Id>();
34
35     for (Vehicle_Order__c order : orders) {
36
37         if (order.Vehicle__c != null) {
38
39             vehicleIds.add(order.Vehicle__c);
40
41         }
42     }
43
44     if (!vehicleIds.isEmpty()) {
45
46         Map<Id, Vehicle__c> vehicleStockMap = new Map<Id, Vehicle__c>();
47
48         for (Vehicle__c vehicle : [SELECT Id, Stock_Quantity__c FROM Vehicle__c WHERE Id IN :vehicleIds]) {
49
50             vehicleStockMap.put(vehicle.Id, vehicle);
51
52         }
53     }
54 }
```



```
1 trigger VehicleOrderTrigger on Vehicle_Order__c (before insert,before update, after insert, after update) {
2
3     VehicleOrderTriggerHandler.handleTrigger(trigger.new, trigger.oldMap, trigger.isBefore,trigger.isAfter, trigger.isInsert, trigger.isUpdate);
4
5 }
```

## Apex Batch Class

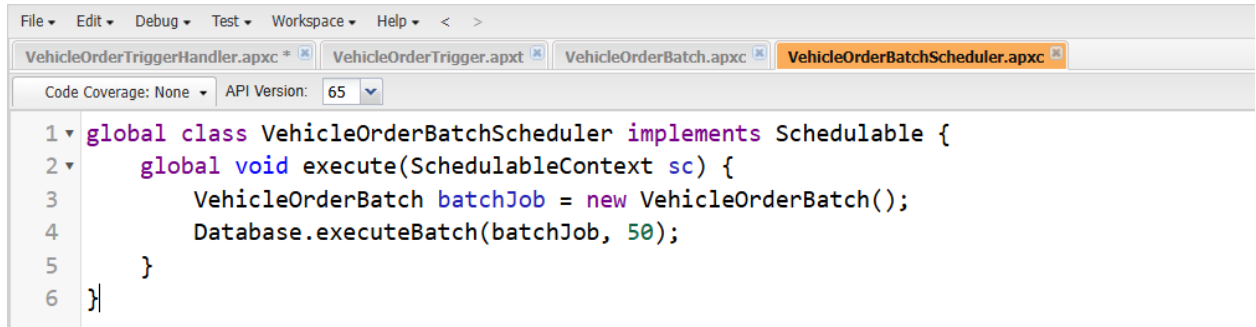
- The class *VehicleOrderBatch* runs daily as it checks for pending orders, available stocks, updates status when it is *Confirmed* and reduces the stock.



```
1 global class VehicleOrderBatch implements Database.Batchable<sObject> {
2
3     global Database.QueryLocator start(Database.BatchableContext bc) {
4         return Database.getQueryLocator([
5             SELECT Id, Status__c, Vehicle__c FROM Vehicle_Order__c WHERE Status__c = 'Pending'
6         ]);
7     }
8
9     global void execute(Database.BatchableContext bc, List<Vehicle_Order__c> orderList) {
10         Set<Id> vehicleIds = new Set<Id>();
11         for (Vehicle_Order__c order : orderList) {
12             if (order.Vehicle__c != null) {
13                 vehicleIds.add(order.Vehicle__c);
14             }
15         }
16
17         if (!vehicleIds.isEmpty()) {
18             Map<Id, Vehicle__c> vehicleStockMap = new Map<Id, Vehicle__c>([
19                 SELECT Id, Stock_Quantity__c FROM Vehicle__c WHERE Id IN :vehicleIds
20             ]);
21
22             List<Vehicle_Order__c> ordersToUpdate = new List<Vehicle_Order__c>();
23
24             for (Vehicle_Order__c order : orderList) {
25                 if (order.Status__c == 'Pending') {
26                     ordersToUpdate.add(order);
27                 }
28             }
29
30             update ordersToUpdate;
31
32             for (Vehicle_Order__c order : ordersToUpdate) {
33                 order.Stock_Quantity__c = order.Stock_Quantity__c - 1;
34                 order.Status__c = 'Confirmed';
35                 update order;
36             }
37         }
38     }
39 }
```

## Apex Batch Scheduled

- The *VehicleOrderBatchScheduler* runs daily at 12pm as it executes batch class automatically.



```
File Edit Debug Test Workspace Help < >
VehicleOrderTriggerHandler.apxc * VehicleOrderTrigger.apxt VehicleOrderBatch.apxc VehicleOrderBatchScheduler.apxc
Code Coverage: None API Version: 65
1 global class VehicleOrderBatchScheduler implements Schedulable {
2     global void execute(SchedulableContext sc) {
3         VehicleOrderBatch batchJob = new VehicleOrderBatch();
4         Database.executeBatch(batchJob, 50);
5     }
6 }
```

## Phase 4: Data Migration, Testing & Security

### Profiles and Roles

- Standard profiles like **Standard User** and **System Administrator** were used.

### Sharing Rules

- **Public Read/Write** for most custom objects.

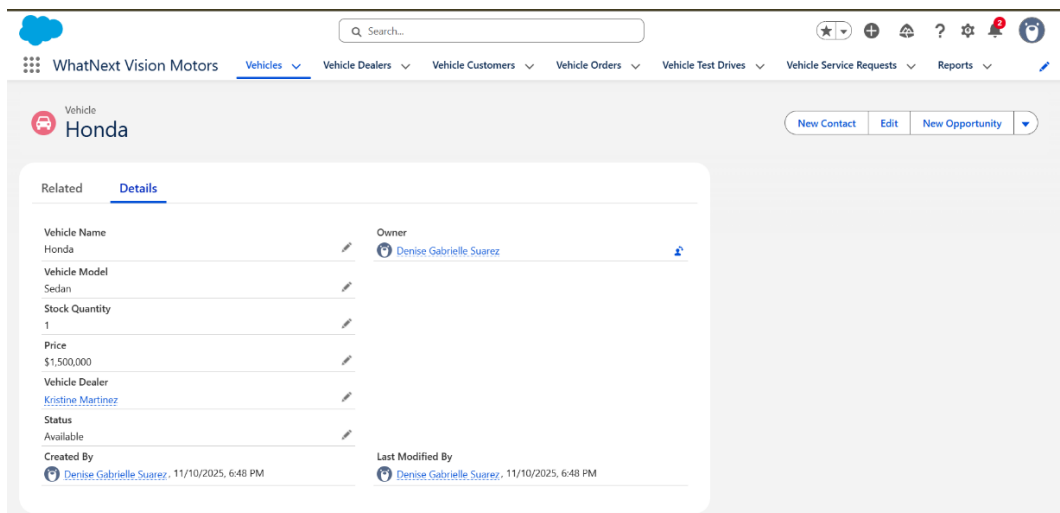
**Preparation of test cases for each salesforce features like creation of Vehicle, Vehicle orders, Approval Process, Automatic Task creation, flows, triggers etc.**

## **1. Create a Vehicle**

### **INPUT:**

- **Vehicle Name:** Honda
- **Vehicle Model:** Sedan
- **Stock Quantity:** 1
- **Price:** \$1,500,000
- **Vehicle Dealer:** Kristine Martinez
- **Status:** Available

### **OUTPUT:**



## **2. Confirmed Order**

### **INPUT:**

- Go to Vehicle Orders tab → Click New.
- **Vehicle:** Honda
- **Status:** Confirmed
- **Customer:** John Doe

### **OUTPUT:**

*The stock became 0.*

The screenshot shows the 'Vehicle Details' page for a Honda vehicle. The page includes a search bar at the top, a navigation menu with options like 'Vehicles', 'Vehicle Dealers', 'Vehicle Customers', 'Vehicle Orders', 'Vehicle Test Drives', 'Vehicle Service Requests', and 'Reports'. The vehicle details are listed in a table:

Field	Value
Vehicle Name	Honda
Vehicle Model	Sedan
Stock Quantity	0
Price	\$1,500,000
Vehicle Dealer	Kristine Martinez
Status	Out of stock
Created By	Denise Gabrielle Suarez, 11/10/2025, 6:48 PM
Last Modified By	Denise Gabrielle Suarez, 11/11/2025, 2:47 AM

### 3. Stock = 0 (Create new order)

#### INPUT:

- **Vehicle:** Honda
- **Status:** Pending
- **Customer:** Jane Air

*Prevent to place an order for 0 stock vehicle.*

The screenshot shows the 'New Vehicle Order' form. The form includes fields for 'Order Number', 'Vehicle Customer' (Jane Air), 'Vehicle' (Honda), 'Order Date' (11/18/2025), 'Status' (Pending), and 'Assigned Dealer'. An error message is displayed: 'We hit a snag. Review the errors on this page. This vehicle is out of stock. Order cannot be placed.' The form also has 'Cancel', 'Save & New', and 'Save' buttons.

#### 4. Test Drive Reminder Email

##### INPUT:

- **Vehicle Customer:** John Doe
- **Test Drive Date:** Tomorrow (pick tomorrow's date)
- **Status:** Scheduled

##### OUTPUT:

The screenshot shows the 'Vehicle Test Drive' management interface for 'Test3'. The interface includes a search bar at the top, a navigation menu with options like 'Vehicles', 'Vehicle Dealers', 'Vehicle Customers', 'Vehicle Orders', 'Vehicle Test Drives', 'Vehicle Service Requests', and 'Reports'. The 'Vehicle Test Drives' section is active, showing a 'Details' tab. The details for 'Test3' are as follows:

Field	Value	Action
Test Drive Name	Test3	Edit
Vehicle Customer	John Doe	Edit
Vehicle	Mitsubishi	Edit
Test Drive Date	11/12/2025	Edit
Status	Scheduled	Edit
Created By	Denise Gabrielle Suarez, 11/11/2025, 2:50 AM	
Owner	Denise Gabrielle Suarez	
Last Modified By	Denise Gabrielle Suarez, 11/11/2025, 2:50 AM	

The screenshot shows a Gmail inbox with a search filter 'in:spam'. The email is from 'WhatNext Vision Motors' and is titled 'Test Drive Reminder'. The email content is as follows:

Dear User John Doe,

This is a reminder that your test drive a04gK000001WOMnQAO is scheduled tomorrow. If you want to reschedule, please contact us at [wvmotorssupport@gmail.com](mailto:wvmotorssupport@gmail.com).

Thank you.

The email is marked as 'spam' and has a 'Report as not spam' button. The interface also shows a 'Compose' button and a list of email folders (Inbox, Starred, Snoozed, Sent, Drafts, Purchases, More) on the left side.

## **Phase 5: Deployment, Documentation & Maintenance**

### **Deployment Strategy**

The Lightning App was deployed directly in the Salesforce org using App builder. The application doesn't use any external tools.

#### **Deployment Steps:**

1. The Lightning App was created and configured using app builder.
2. The app was saved and activated.
3. Visibility settings and profiles were updated to ensure the app appears in the App Launcher.
4. Testing was performed inside the same org to confirm navigation and functionality.

### **Testing & Sample Scenarios**

#### **Test Cases:**

Several real-use scenarios were tested to confirm that the system behaves as expected:

- Attempting to create a vehicle order with zero stock shouldn't place an order.
- Setting stock to 1 and placing an order should correctly decrease the stock to 1. The current stock is 0.
- Creating a pending order and then updating the stock should allow the batch job to automatically confirm the order

### **System Maintenance and Monitoring**

The following are the basic maintenance and monitoring strategy to ensure smooth system performance:

- The app will be reviewed periodically for enhancements.
- Lightning App Builder will be used to update pages or modify layouts.
- Admin tools such as Setup Audit Trail, Flow Error Logs, and User Access Logs will be monitored for issues.
- Profile and Permission Set updates will be applied when new users need access.



## Troubleshooting Approach

- Use Lightning App Builder's configuration panel to verify page assignments and visibility rules.
- Check Object Manager for missing permissions or fields.
- Use Debug Logs to investigate errors related to automation (Flows, Triggers, etc.).
- Confirm that the app is assigned to profiles if users cannot see it in the App Launcher.

## Conclusion

The WhatNext Vision Motors CRM system built on Salesforce successfully enhances both customer experience and operational efficiency. The system significantly reduces manual workload and minimizes the risk of errors by automating key processes such as dealer assignment, stock validation, and test drive reminders. Features like Lightning Apps and Dynamic Forms further improve usability, ensuring that internal users can navigate and manage data with ease. Overall, the implemented solution provides a streamlined, reliable, and customer-centric workflow that strengthens the company's service quality and operational performance.

Several Salesforce capabilities were used to support the system's functionality. *Validation rules* were implemented to prevent incorrect or incomplete data entry, such as restricting order creation when stock is zero and the form cannot be saved when there are missing fields. *Approval processes* were set up to ensure the effectiveness of relevant actions like order confirmation. *Automation flows or record-triggered flows* were used and developed to handle key processes, including updating stock, sending reminders, and confirming pending orders through scheduler. Additional components, such as custom objects and Apex classes, were also created to support system operations and data monitoring.

Testing was done in the Salesforce org itself. Each flow was tested by triggering the corresponding action for example, creating or updating a record to confirm field updates, email alerts, and automation behavior. Validation rules were tested by intentionally entering invalid data to ensure the rule triggers the correct error message.

## Future Enhancements

### 1. Customer Portal Integration

- A portal or community where customer can login and view orders.

### 2. Mobile Application Support

- Extend CRM features to a mobile app to provide customers and dealers easier access to order updates and service information.

### **3. Reports and Dashboard**

- Develop enhanced reporting tools to give management deeper insights into sales performance, dealer efficiency, and customer behavior.

### **4. Chatbot and Virtual Assistant Integration**

- Add automated customer support to provide real-time answers, guide users through the ordering process, and improve response times.

### **5. SMS Integration**

- Notify customers via SMS about order updates.

### **6. Financial System Integration**

- Connect the system using API payment gateways to streamline billing, invoicing, and loan processing.