

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

ABSTRACT

WhatsNext Vision Motors is undertaking a transformative Salesforce CRM implementation aimed at enhancing customer experience and operational efficiency within the automotive sector. Central to the solution is a data model integrating vehicle inventory, dealer locations, and customer management. The CRM leverages automated workflows and Apex triggers to enforce business logic—blocking orders for out-of-stock vehicles and auto-assigning new orders to the nearest dealer based on customer geolocation.

Complementing these real-time safeguards, the project integrates scheduled processes: batch Apex updates stock availability across bulk orders and scheduled Apex dispatches email reminders for test drives and stock replenishment. Together, these components form a cohesive system that offers transparent, accurate order tracking—marking statuses as “Pending” or “Confirmed” depending on inventory levels.

The technical implementation includes structured data modeling of vehicle and dealer records, Lightning App Builder for streamlined UI interactions, record-triggered flows for dynamic logic execution, and robust Apex code for validation and automation. By reducing manual intervention, minimizing customer friction, and improving responsiveness to stock changes, the project is set to significantly elevate customer satisfaction and internal productivity— propelling WhatsNext Vision Motors toward more agile and customer-centric operations.

OBJECTIVE

The objective of this project is to enhance the customer ordering experience by leveraging Salesforce automation and intelligent data handling. It aims to streamline dealer assignment, ensure real-time stock validation, and provide accurate order status updates. By doing so, WhatsNext Vision Motors seeks to improve customer satisfaction and operational efficiency across its mobility services.

- **Enhanced Customer Experience:** Simplifying the ordering process with automated dealer suggestions and real-time updates.
- **Real-Time Stock Management:** Preventing out-of-stock orders through accurate inventory validation.
- **Automated Dealer Assignment:** Assigning orders to the nearest dealer based on customer location.
- **Efficient Order Processing:** Using scheduled processes to update order statuses and streamline fulfillment.
- **Smart Salesforce Integration:** Implementing Apex, Flows, and Batch Jobs to automate and scale operations.

TECHNOLOGY DESCRIPTION

Salesforce:-

Salesforce is a cloud-based Customer Relationship Management (CRM) platform that enables businesses to manage customer interactions, data, and processes efficiently. In this project, it is used to store and manage vehicle details, dealer locations, and customer orders. The platform supports automation through Flows, Apex triggers, and batch jobs to ensure accurate stock validation and smart dealer assignment. By leveraging Salesforce, WhatsNext Vision Motors enhances operational efficiency and delivers a seamless, customer-centric ordering experience.

Custom Objects:-

Objects in salesforce are like tables in a database. Custom Objects are created to store specific data.

Example:

- Vehicle_c - Stores vehicle details
- Vehicle_Dealer_c- Stores authorized dealer info
- Vehicle_Customer_c- Stores customer details
- Vehicle_Order_c- Tracks vehicle purchases
- Vehicle_Test_Drive_c- Tracks test drive bookings
- Vehicle_Service_Request_c- Tracks vehicle servicing requests

Tabs:-

Tabs are used to display data in the Salesforce UI

Example: A tab for vehicle_c allows users to easily view, create, and manage vehicle

Custom APP:-

An App in Salesforce is a collection of tabs grouped together for a specific business purpose, allowing users to access related data and functionality in one place.

Fields:-

A **fields** in Salesforce is a specific piece of data stored in an object, much like a column in a spreadsheet. Each field holds a particular type of information such as text, date, number, or picklist values.

Example: Vehicle_Model_c – A **Picklist** field in the Vehicle_c object with options like *Sedan*, *SUV*, *EV*, etc.

Flows:-

Flows automate business logic without writing code. They can create or update records, and send notifications automatically.

Example:-

- A flow triggers an email alert whenever a new order is created.

Apex:-

Apex is Salesforce's Object-Oriented programming language. It allows developers to write custom logic .

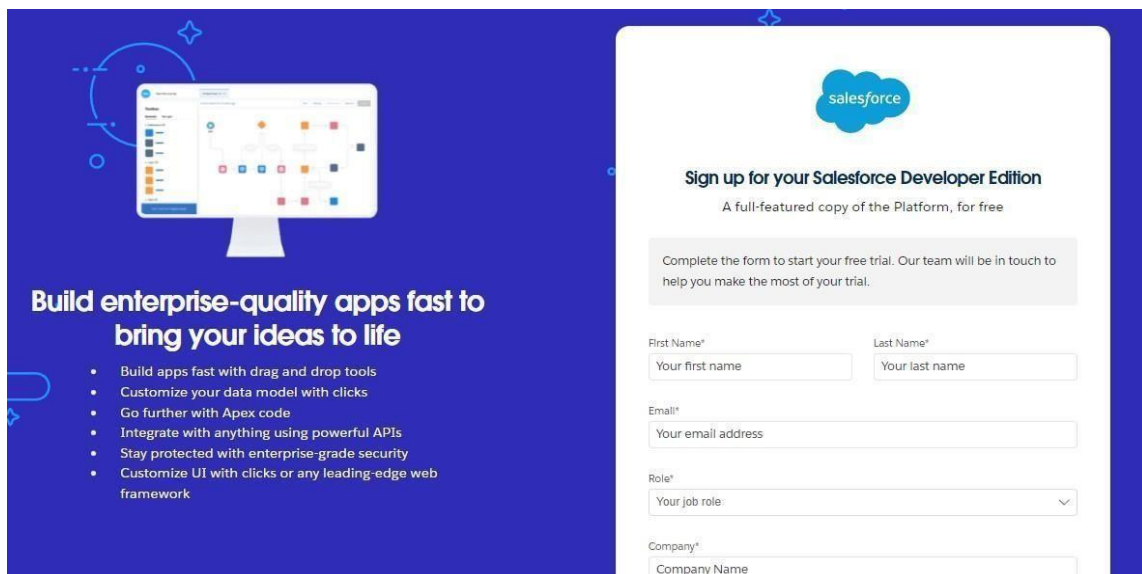
Example Triggers:

- A trigger automatically validates stock availability when a new vehicle order is created.
- It prevents orders if the vehicle is out of stock.
- Once the order is confirmed, the trigger updates the stock quantity by reducing it.

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

Six Custom Objects were created to store business-critical data

- **Vehicle** – Stores vehicle details like model, stock, price, and status.
- **Vehicle Dealer** – Contains information about dealers such as location and contact details.
- **Vehicle Order** – Tracks customer orders, order dates, and order status.
- **Vehicle Customer** – Maintains customer details including contact and preferred vehicle type.
- **Vehicle Test Drive** – Records test drive schedules and status.
- **Vehicle Service Request** – Logs service requests, dates, issues, and progress status.

Steps followed:

- Navigated to Setup → Object Manager → Create → Custom Object.
- Provided Label, Name, and enabled options for Reports and Search.
- Saved and created Tabs for each object.

Object Manager					
6 Items, Sorted by Label					
	Q vehicle	Schema Builder	Create		
LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Vehicle	Vehicle__c	Custom Object		12/9/2025	✓
Vehicle Customer	Vehicle_Customer__c	Custom Object		12/9/2025	✓
Vehicle Dealer	Vehicle_Dealer__c	Custom Object		12/9/2025	✓
Vehicle Order	Vehicle_Order__c	Custom Object		12/9/2025	✓
Vehicle Service Request	Vehicle_Service_Request__c	Custom Object		12/9/2025	✓
Vehicle Test Drive	Vehicle_Test_Drive__c	Custom Object		12/9/2025	✓

3. Creating a Custom Tab

Setup Home Object Manager

Q tabs

User Interface

Rename Tabs and Labels

Custom Tabs

Help for this Page

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs

New What is This?

Action	Label	Tab Style	Description
Edit Del	Vehicle Customers	People	
Edit Del	Vehicle Dealers	Building	
Edit Del	Vehicle Orders	Box	
Edit Del	VehicleS	Car	
Edit Del	Vehicle Service Requests	Form	
Edit Del	Vehicle Test Drives	Gears	

Web Tabs

New What is This?

No Web Tabs have been defined

Visualforce Tabs

New What is This?

No Visualforce Tabs have been defined

4. Creating the Lightning App

- A custom Lightning App named WhatNext Vision Motors was created.
- Included tabs: Vehicle, Vehicle Dealer, Vehicle Order, Vehicle Customer, Vehicle Test Drive, Vehicle Service
- Assigned to the System Administrator profile.

Lightning App Builder App Settings Pages WhatNext Vision Motors

App Settings

App Details & Branding

App Options
Utility Items (Desktop Only)
Navigation Items
User Profiles

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

*App Name WhatNext Vision Motors

*Developer Name WhatNext_Vision_Motors

Description Enter a description...

App Branding

Image Upload

Primary Color Hex Value #0070D2

Org Theme Options
☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

WhatNext Vision Motors

5. Creating Fields

Custom fields were created on each object to store specific business data.

For example, on the Vehicle__c object, a Picklist field named Vehicle_Model__c was created with values like *Sedan*, *SUV*, and *EV*.

Steps followed:

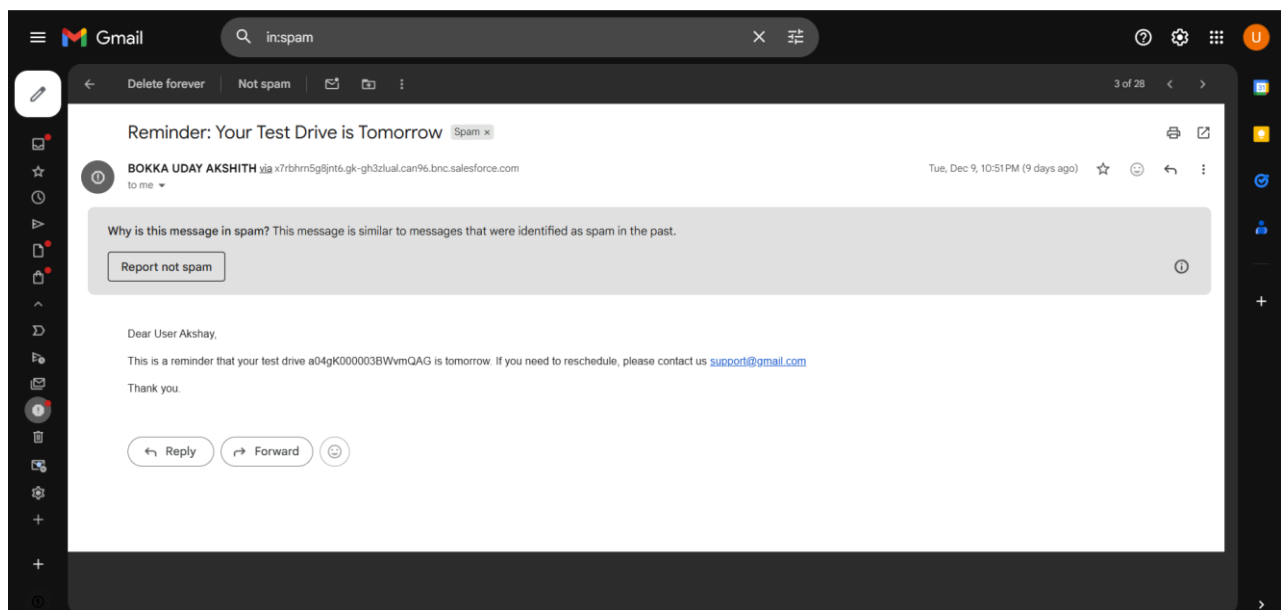
- Navigated to Setup → Object Manager → [Object Name] → Fields & Relationships → New.

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7. Create Apex and Trigger Batch Jobs:

Apex classes and triggers were created to enforce business logic during order processing.

- A **trigger** checks vehicle stock when an order is placed and updates stock on confirmation.
- A **batch class** regularly scans pending orders and updates them to *Confirmed* if stock becomes available.
- A **scheduled class** runs the batch job daily to automate order updates.

Steps followed:

- Developer Console → File → New → Apex Class.

```

orgfarm-55ce126fac-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
File Edit Debug Test Workspace Help < >
VehicleOrderTriggerHandler.apxc VehicleOrderTrigger.apxt VehicleOrderBatch.apxc VehicleOrderBatchScheduler.apxc
Code Coverage: None API Version: 65
1 public class VehicleOrderTriggerHandler {
2
3     public static void handleTrigger(List<Vehicle_Order__c> newOrders, Map<Id, Vehicle_Order__c> c
4         if (isBefore && (isInsert || isUpdate)) {
5             preventOrderIfOutOfStock(newOrders);
6         }
7
8         if (isAfter && (isInsert || isUpdate)) {
9             updateStockOnOrderPlacement(newOrders);
10        }
11    }
12
13    // ✗ Prevent placing an order if stock is zero
14    private static void preventOrderIfOutOfStock(List<Vehicle_Order__c> orders) {
15        Set<Id> vehicleIds = new Set<Id>();

```

```
File Edit Debug Test Workspace Help < >
VehicleOrderTriggerHandler.apxc VehicleOrderTrigger.apxt VehicleOrderBatch.apxc VehicleOrderBatchScheduler.apxc
Code Coverage: None API Version: 65
1 trigger VehicleOrderTrigger on Vehicle_Order__c (before insert, before update, after insert
2   VehicleOrderTriggerHandler.handleTrigger(Triquer.new, Triquer.oldMap, Triquer.isBefore,
3 }
```

```
File Edit Debug Test Workspace Help < >
VehicleOrderTriggerHandler.apxc VehicleOrderTrigger.apxt VehicleOrderBatch.apxc VehicleOrderBatchScheduler.apxc
Code Coverage: None API Version: 65
1 global class VehicleOrderBatch implements Database.Batchable<Object> {
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()) {
```

```
orgfarm-55ce126fac-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
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); // 50 = batch size
5   }
6 }
```


Search

New Vehicle Order

Information

* Vehicle Order Name

ORD-001

Vehicle Customer

Akshay

Vehicle

Honda

Order Date

12/24/2025

Status

Pending

Assigned Dealer

paul

Owner

BOKKA UDAY AKSHITH

We hit a snag.

Review the errors on this page.

- This vehicle is out of stock. Order cannot be placed.

Cancel

Save & New

Save

8. Scheduled Jobs

The **Scheduled Apex Jobs** page in Salesforce displays all Apex jobs that are scheduled to run automatically, such as batch jobs, schedulable classes, and queueable jobs. It provides key details like job name, type, status (Queued, Processing, Completed, Failed), submission time, next scheduled run, and the user who submitted it. From this page, administrators can monitor job progress, check for errors, and manage jobs by aborting, pausing, or deleting them when needed. This helps ensure that automated processes run smoothly and any issues can be quickly identified and resolved.

Setup

Home

Object Manager

Search Setup

jobs

Environments

Jobs

Apex Flex Queue

Apex Jobs

Background Jobs

Bulk Data Load Jobs

Scheduled Jobs

Didn't find what you're looking for?

Try using Global Search.

SETUP

Scheduled Jobs

All Scheduled Jobs

Help for this Page

The All Scheduled Jobs page lists all of the jobs scheduled by your users. Multiple job types may display on this page. You can delete scheduled jobs if you have the permission to do so.

Percentage of Scheduled Jobs Used: 2%

You have currently used 2 scheduled Apex jobs out of an allowed organization limit of 100 active or scheduled jobs. To learn about how this limit is calculated and what contributes to it see the [Lightning Platform Apex Limits](#) topic.

VIEW: All Scheduled Jobs

Create New View

Action

Job Name *

Submitted By

Submitted

Started

Next Scheduled Run

Type

Cron Trigger ID

Manage | Del | Pause | Job

Daily Inventory Sync

siddavaram_vishnavi

7/16/2025, 4:48 AM

7/21/2025, 12:02 AM

7/22/2025, 12:00 AM

Scheduled Apex

08egK000007Wp4S

Manage | Del | Pause | Job

Daily Vehicle Order Processing

siddavaram_vishnavi

7/16/2025, 4:13 AM

7/20/2025, 12:02 PM

7/21/2025, 12:00 PM

Scheduled Apex

08egK000007Wp5p

Del

Metalytics Data Loader Job for Org : 00DgK000006xMfp

User Integration

7/7/2025, 11:28 AM

7/20/2025, 6:24 AM

7/21/2025, 6:24 AM

Autonomous Data Loader Job

08egK000006xwBE

Program Milestone Computation Cron Job

Process, Automated

7/7/2025, 11:28 AM

7/21/2025, 12:00 AM

7/21/2025, 6:59 AM

Program Milestone Computation Cron Job

08egK000006xwBC

Program Status Update Cron Job

Process, Automated

7/7/2025, 11:28 AM

7/20/2025, 8:01 PM

7/21/2025, 5:00 AM

Program Status Update Cron Job

08egK000006xwBD

9

PROJECT EXPLANATION WITH REAL-WORLD EXAMPLE

1. Customer Registration

Real-Life Example:

A customer, **Elijah Mikaelson**, visits the automobile showroom or website.

In Salesforce:

- A new record is created in the **Vehicle_Customer_c** object with his details such as Name, Phone, Email, and Address.
- **Validation Rule:** Ensures the email is valid (e.g., must contain “@gmail.com”). If invalid, an error is shown.

2. Vehicle & Inventory Management

Real-Life Example:

The store admin adds **cars like BMW X5, Toyota Fortuner, etc.**, with stock quantity (e.g., 5 BMWs and 3 Fortuners).

In Salesforce:

- Each vehicle is stored in the **Vehicle_c** object with details like Price, Model, and Stock Quantity.
- **Validation Rule:** Prevents adding a vehicle with negative stock values.

3. Order Placement

Real-Life Example:

Elijah places an order for **1 BMW X5** (Price ₹50,00,000).

In Salesforce:

- A new record is created in the **Vehicle_Order_c** object.
- **Apex Trigger (VehicleOrderTrigger):**
 - Automatically calculates **Total Amount = Price × Quantity**.
 - Checks **stock availability**:
 - If stock > 0 → **Status_c = Confirmed**.
 - If stock = 0 → **Status_c = Pending**.

4. Inventory Update

Real-Life Example:

When Elijah's order is confirmed, the BMW stock decreases by 1 (from 5 → 4).

In Salesforce:

- **Apex Trigger (VehicleOrderTriggerHandler):**
 - Updates **Vehicle_c.Stock_Quantity_c** by subtracting the quantity ordered.
 - Prevents stock from going below zero.
- **Confirmed Orders (Stock Refill)**

Real-Life Example:

If BMW stock is 0 and Elijah's order was pending, when the admin refills **5 BMWs**, the system **automatically confirms pending orders** (if stock is available).

In Salesforce:

- **VehicleTrigger (After Update):**
 - Detects stock refill.
 - Calls `confirmPendingOrders()` in the **VehicleOrderTriggerHandler**.
 - Updates all pending orders to **Confirmed** until stock runs out.
- 6. Scheduled Batch Processing**

Real-Life Example:

At the end of each day, a **batch job** runs to update **any remaining pending orders** automatically.

In Salesforce:

- **VehicleOrderBatch & VehicleOrderBatchScheduler:**
 - Confirm pending orders if stock is available.
 - Sends admin a log of processed orders.

7. Email Notifications (Flow)

Real-Life Example:

When an order is **confirmed** or **pending**, Elijah gets an **email notification**.

In Salesforce:

- **Record-Triggered Flow:**
 - Sends an email alert:
 - “Your BMW X5 order is confirmed!” or
 - “Your order is pending due to low stock.”

8. Users and Roles

Real-Life Example:

- **Niklaus Mikaelson** (Sales Manager) handles customer orders.
- **Kol Mikaelson** (Inventory Manager) manages vehicle stock.

In Salesforce:

- Roles and Profiles:
 - **Sales Role:** Access to Vehicle_Order_c and Vehicle_Customer_c.
 - **Inventory Role:** Access to Vehicle_c and stock management.

9. Real-Life Benefit

This system ensures:

- **No manual stock checks** (triggers handle it automatically).
- **Automatic order status updates** (Confirmed or Pending).
- **Smooth communication with customers** via email alerts.
- **Dealer assignment** (optional via Flow) ensures orders are assigned to the nearest dealer.

SCREENSHOTS

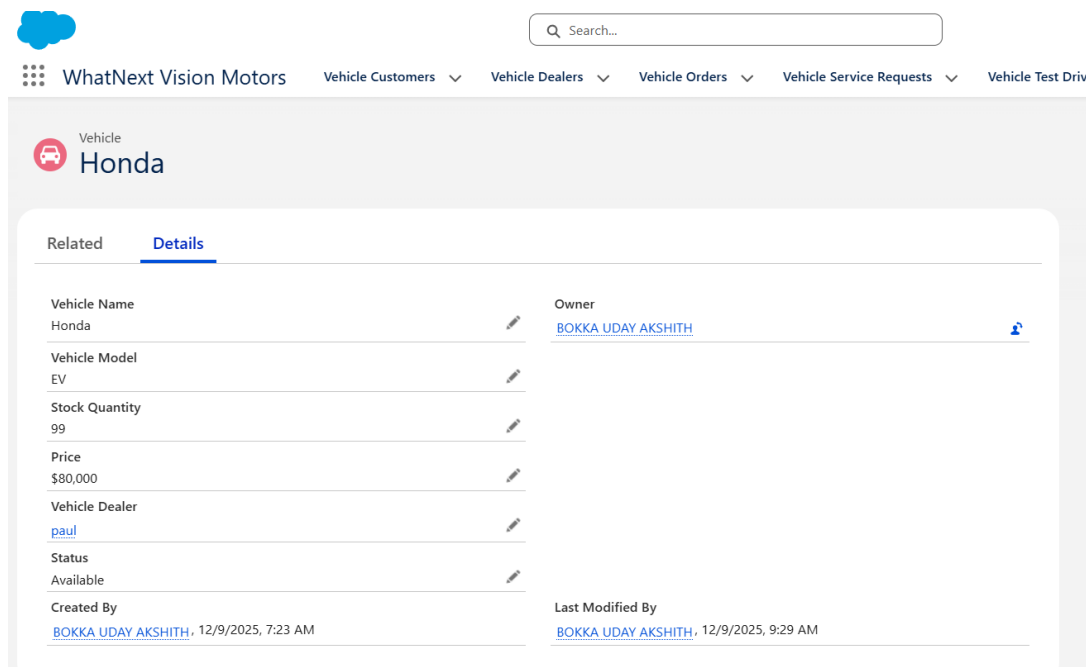


Fig: Vehicles in WhatNext Vision Motors

WhatNext Vision Motors

Vehicle Customers
Vehicle Dealers
Vehicle Orders
Vehicle Service Requests
Vehicle Test

Vehicle Customer

Akshay

Related

Details

Vehicle_Customer Name

Akshay

Email

udayakshith1905@gmail.com

Phone

(123) 456-7890

Address

Tirupati

Preferred Vehicle Type

Sedan

Created By

BOKKA UDAY AKSHITH, 12/9/2025, 7:19 AM

Owner

BOKKA UDAY AKSHITH

Last Modified By

BOKKA UDAY AKSHITH, 12/9/2025, 8:53 AM

Fig: Customers in WhatNext Vision Motors

WhatNext Vision Motors

Vehicle Customers
Vehicle Dealers
Vehicle Orders
Vehicle Service Requests
Vehicle Test

Vehicle Order

abc

Related

Details

Vehicle Order Name

abc

Vehicle Customer

Akshay

Vehicle

Honda

Order Date

12/10/2025

Status

Confirmed

Assigned Dealer

Created By

BOKKA UDAY AKSHITH, 12/9/2025, 9:17 AM

Owner

BOKKA UDAY AKSHITH

Last Modified By

BOKKA UDAY AKSHITH, 12/9/2025, 9:17 AM

Fig: Vehicle Orders in WhatNext Vision Motors

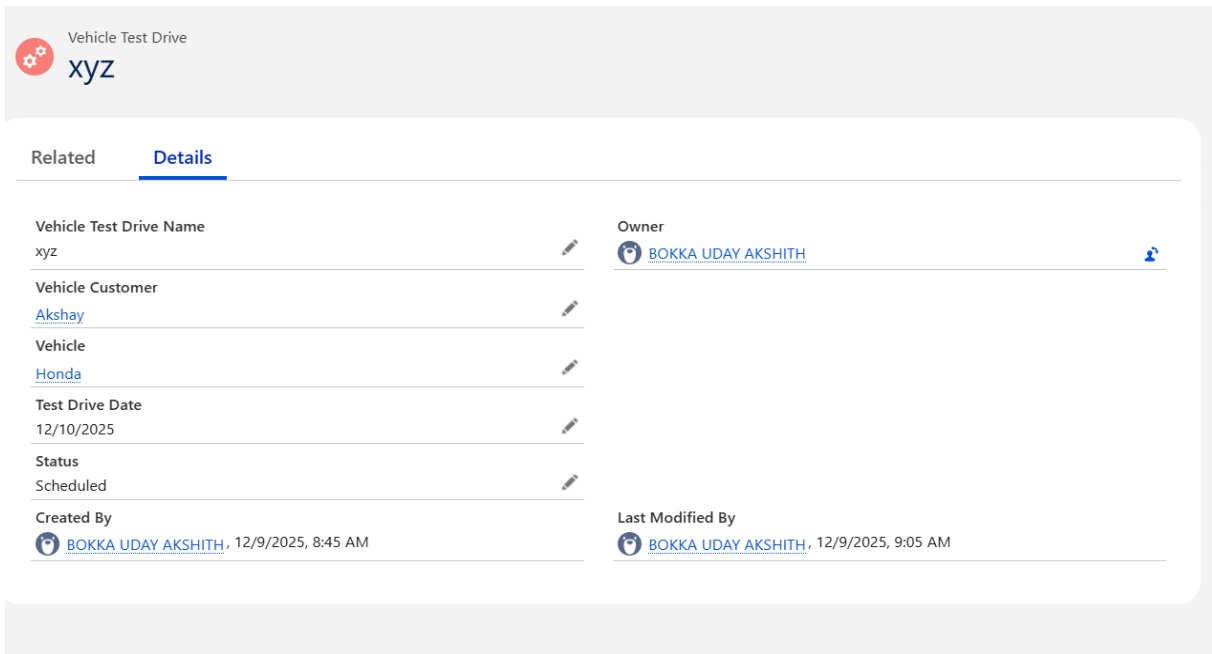


Fig: Test Drives in WhatNext Vision Motors

CONCLUSION

WhatNext Vision Motors leverages Salesforce to streamline its vehicle sales and service operations. By creating custom objects, automated flows, and Apex triggers, the company ensures efficient order processing, real-time stock management, and improved customer engagement. This digital transformation enhances productivity, reduces errors, and delivers a seamless experience for both staff and customers, positioning WhatNext Vision Motors for sustained growth and success.

Future Scope

1. **Customer Portal Integration** ○ Develop a **Salesforce Community Portal** where customers can log in to:
 - View their order history and current order status.
 - Check loyalty program points and rewards.
 - Raise queries or service requests directly.
2. **Mobile App using Salesforce Mobile SDK** ○ Build a **mobile application** for store staff and managers to:
 - Manage inventory (add or update stock).
 - Process customer orders in real-time.
 - Access dashboards and order reports on the go.
3. **Reports & Dashboard** ○ Create **dynamic dashboards** and reports in Salesforce for:
 - Real-time vehicle stock levels.
 - Sales trends and revenue analysis.
 - Monitoring loyalty program metrics.
4. **AI-Powered Recommendations (Einstein AI)** ○ Integrate **Salesforce Einstein** to:
 - Analyze customer purchase history.

- Provide **personalized vehicle recommendations** (e.g., suggest SUVs for customers buying family cars).
5. **WhatsApp/SMS Integration** ○ Use Salesforce **Digital Engagement** or third-party tools (like Twilio) to:
- Send **instant notifications** about order confirmation or pending status.
 - Update customers about loyalty status or promotional offers.