

# **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 .

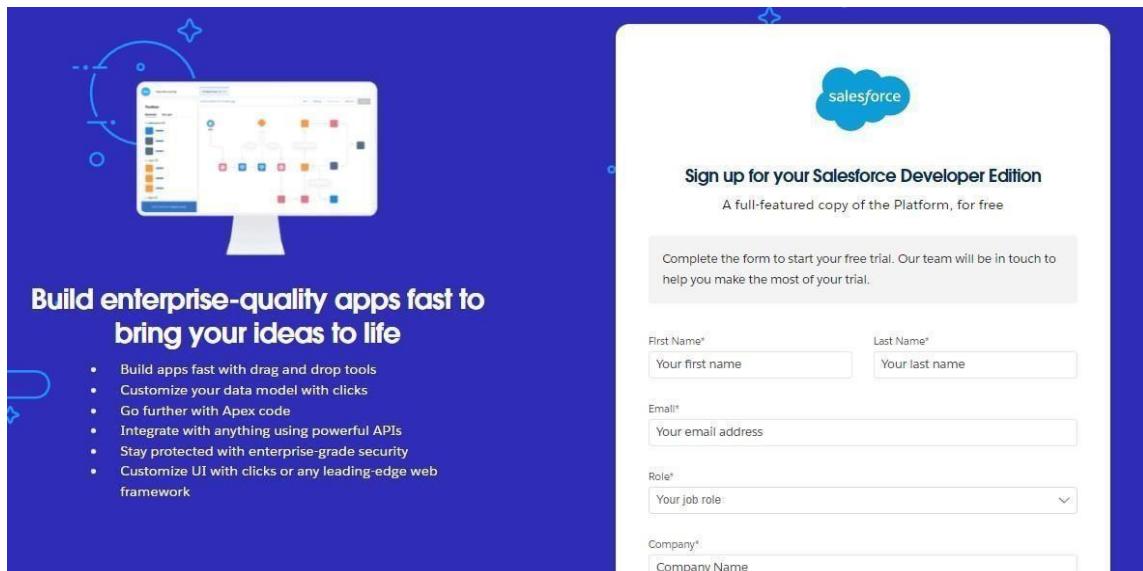
Example Triggers:

- 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.

The screenshot shows the Salesforce Object Manager page. At the top, there is a search bar with the query "vehicle", a "Schema Builder" button, and a "Create" button. Below the header, it says "6 items. Sorted by Label". The main area is a table with columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The data in the table is as follows:

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

The screenshot shows the Salesforce Tabs setup page. The left sidebar has a search bar with "tabs" and a "User Interface" section with "Rename Tabs and Labels" and "Tabs" selected. The main area has a title "Custom Tabs" with a sub-instruction: "You can create new custom tabs to extend Salesforce functionality or to build new application functionality". It includes sections for "Custom Object Tabs", "Web Tabs", and "Visualforce Tabs". The "Custom Object Tabs" section shows a table with columns: Action, Label, Tab Style, and Description. The data is as follows:

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	

## 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.

## 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.

Object	Field Label	Field Name	Data Type	Controlling
Vehicle	Created By	CreatedById	Lookup(User)	
Vehicle	Last Modified By	LastModifiedById	Lookup(User)	
Vehicle	Owner	OwnerId	Lookup(User/Group)	
Vehicle	Price	Price__c	Currency(10, 0)	
Vehicle	Status	Status__c	Picklist	
Vehicle	Stock Quantity	Stock_Quantity__c	Number(10, 0)	
Vehicle	Vehicle Dealer	Vehicle_Dealer__c	Lookup(Vehicle Dealer)	
Vehicle	Vehicle Model	Vehicle_Model__c	Picklist	
Vehicle	Vehicle Name	Name	Text(80)	
Vehicle Customer	Address	Address__c	Text(60)	
Vehicle Customer	Created By	CreatedById	Lookup(User)	
Vehicle Customer	Email	Email__c	Email	
Vehicle Customer	Last Modified By	LastModifiedById	Lookup(User)	
Vehicle Customer	Owner	OwnerId	Lookup(User/Group)	
Vehicle Customer	Phone	Phone__c	Phone	
Vehicle Customer	Preferred Vehicle Type	Preferred_Vehicle_Type__c	Picklist	
Vehicle Customer	Vehicle Customer Name	Name	Text(60)	
Vehicle Dealer	Created By	CreatedById	Lookup(User)	
Vehicle Dealer	Dealer Code	Dealer_Code__c	Auto Number	
Vehicle Dealer	Dealer Location	Dealer_Location__c	Text(60)	
Vehicle Dealer	Email	Email__c	Email	
Vehicle Dealer	Last Modified By	LastModifiedById	Lookup(User)	
Vehicle Dealer	Owner	OwnerId	Lookup(User/Group)	
Vehicle Dealer	Phone	Phone__c	Phone	
Vehicle Dealer	Vehicle Dealer Name	Name	Text(80)	
Vehicle Order	Assigned Dealer	Assigned_Dealer__c	Lookup(Vehicle Dealer)	
Vehicle Order	Created By	CreatedById	Lookup(User)	
Vehicle Order	Last Modified By	LastModifiedById	Lookup(User)	
Vehicle Order	Order Date	Order_Date__c	Date	
Vehicle Order	Owner	OwnerId	Lookup(User/Group)	
Vehicle Order	Status	Status__c	Picklist	
Vehicle Order	Vehicle	Vehicle__c	Lookup(Vehicle)	
Vehicle Order	Vehicle Customer	Vehicle_Customer__c	Lookup(Vehicle Customer)	
Vehicle Order	Vehicle Order Name	Name	Text(80)	

Vehicle Service Request		Vehicle Test Drive	
Fields & Relationships		Fields & Relationships	
Details		Details	
Page Layouts		Page Layouts	
Lightning Record Pages		Lightning Record Pages	
Buttons, Links, and Actions		Buttons, Links, and Actions	
Compact Layouts		Compact Layouts	
Field Sets		Field Sets	
Object Limits		Object Limits	
Record Types		Record Types	
Related Lookup Filters		Related Lookup Filters	
Search Layouts		Search Layouts	
List View Button Layout		List View Button Layout	
Restriction Rules		Restriction Rules	
Scoping Rules		Vehicle Test Drive Name	Name
			Text(80)

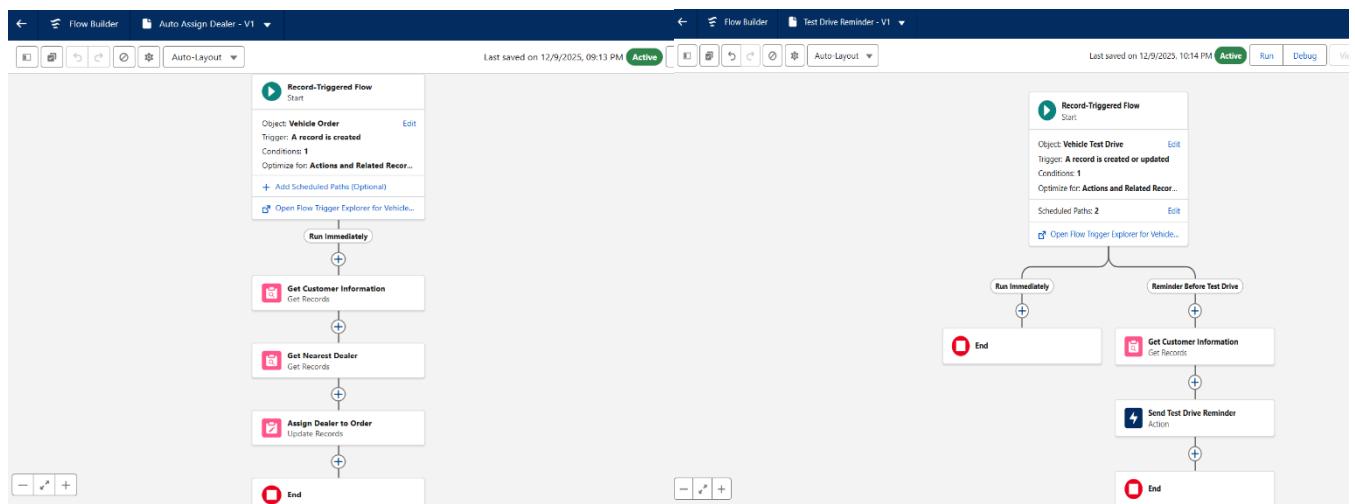
## 6. Creating Flows

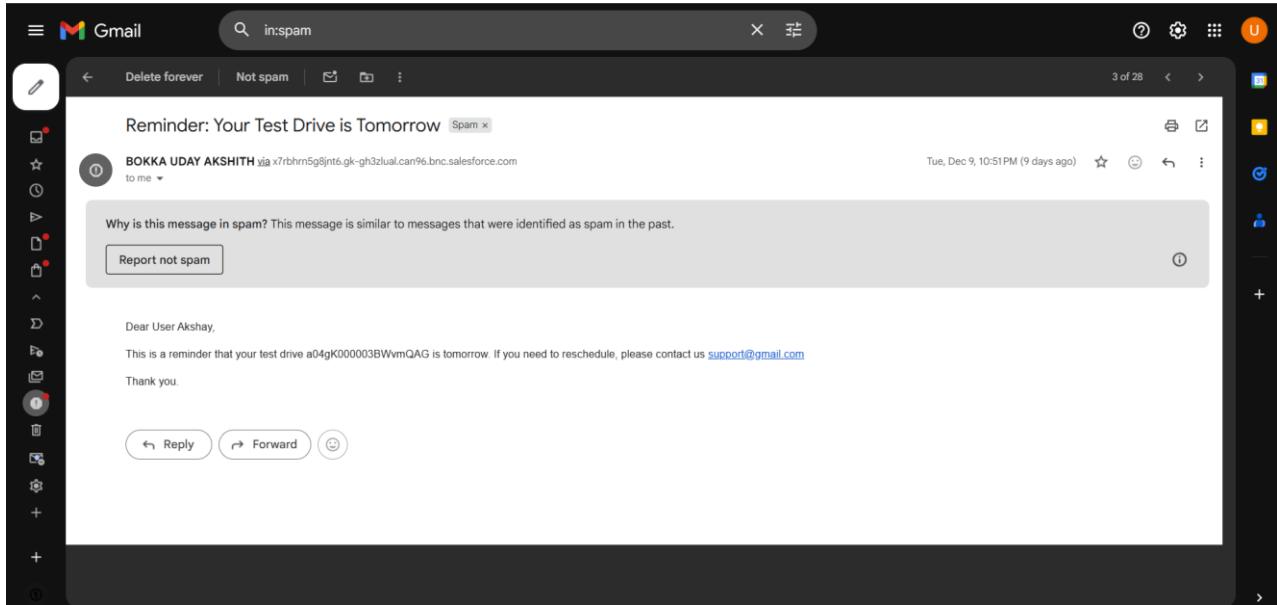
Record-triggered flows were created to automate key business processes without code. For example, a flow was built to **auto-assign the nearest dealer** when a vehicle order is created with status *Pending*.

Another flow sends **email reminders** to customers **one day before** their scheduled test drive.

### Steps followed:

- Setup → Flows → New Flow → Record-Triggered Flow.





## 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:

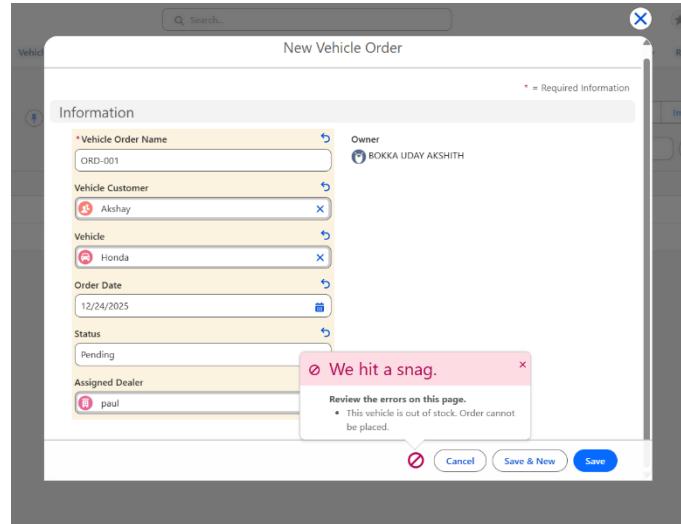
- Developer Console → File → New → Apex Class.

```
1 public class VehicleOrderTriggerHandler {  
2  
3     public static void handleTrigger(List<Vehicle_Order__c> newOrders, Map<Id, Vehicle_Order__c> oldOrders, Boolean isBefore, Boolean isInsert) {  
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>();  
16        for (Vehicle_Order__c order : orders) {  
17            if (order.getStockLevel() < 0) {  
18                vehicleIds.add(order.getId());  
19            }  
20        }  
21        Vehicle__c vehicle = Vehicle__c.getVehicleByIds(vehicleIds);  
22        vehicle.setStockLevel(0);  
23        vehicle.update();  
24    }  
25}
```

```
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(Trigger.new, Trigger.oldMap, Trigger.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<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()) {
```

```
%% 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 }
```



## 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.

Action	Job Name	Submitted By	Submitted	Started	Next Scheduled Run	Type	Cron Trigger ID
Manage   Del   Pause Job	Daily Inventory Sync	siddavatam_vishnau	7/16/2025, 4:48 AM	7/21/2025, 12:00 AM	7/22/2025, 12:00 AM	Scheduled Apex	08egk000007WP45
Manage   Del   Pause Job	Daily Vehicle Order Processing	siddavatam_vishnau	7/16/2025, 4:13 AM	7/20/2025, 12:02 PM	7/21/2025, 12:00 PM	Scheduled Apex	08egk000007W0sp
Del	Metalytics Data Loader Job for Org: 00DGK000006wMtp	User_Integration	7/7/2025, 11:28 AM	7/20/2025, 6:24 AM	7/21/2025, 6:24 AM	Autonomous Data Loader Job	08egk0000006x8E
	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	08egk0000006wBC
	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	08egk0000006wBD

## **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:

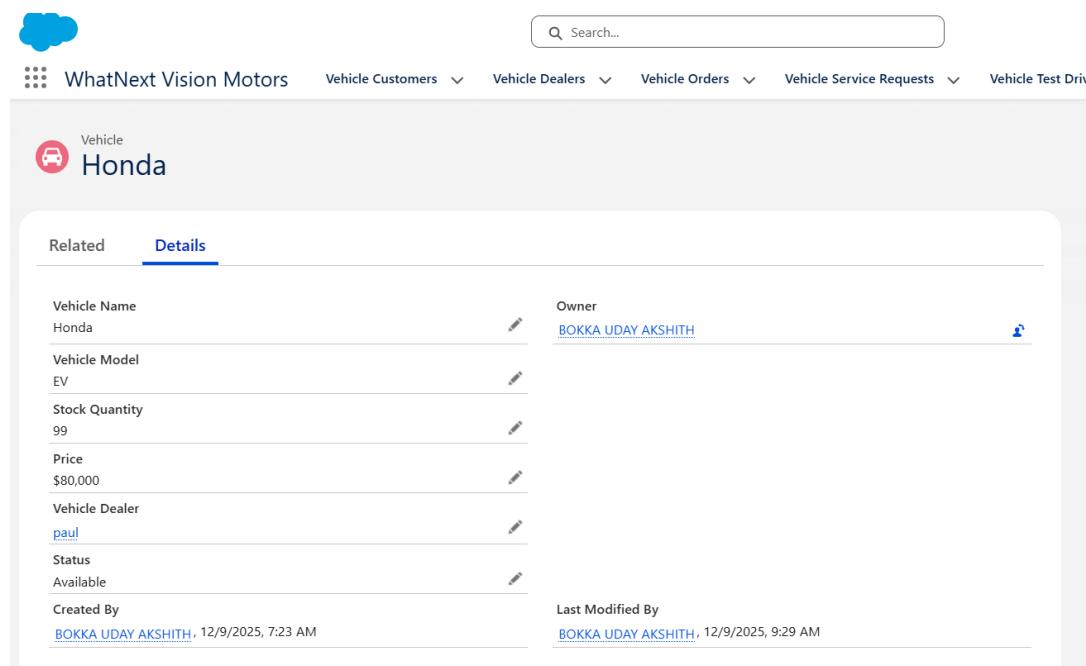
- Roles and Profiles:
  - **Sales Role:** Access to Vehicle\_Order\_c and Vehicle\_Customer\_c.
  - **Inventory Role:** Access to Vehicle\_c and stock management.

## 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	Owner <a href="#">BOKKA UDAY AKSHITH</a>
Email <a href="mailto:udayakshith1905@gmail.com">udayakshith1905@gmail.com</a>	
Phone <a href="tel:(123)456-7890">(123) 456-7890</a>	
Address Tirupati	
Preferred Vehicle Type Sedan	
Created By <a href="#">BOKKA UDAY AKSHITH</a> , 12/9/2025, 7:19 AM	Last Modified By <a href="#">BOKKA UDAY AKSHITH</a> , 12/9/2025, 8:53 AM

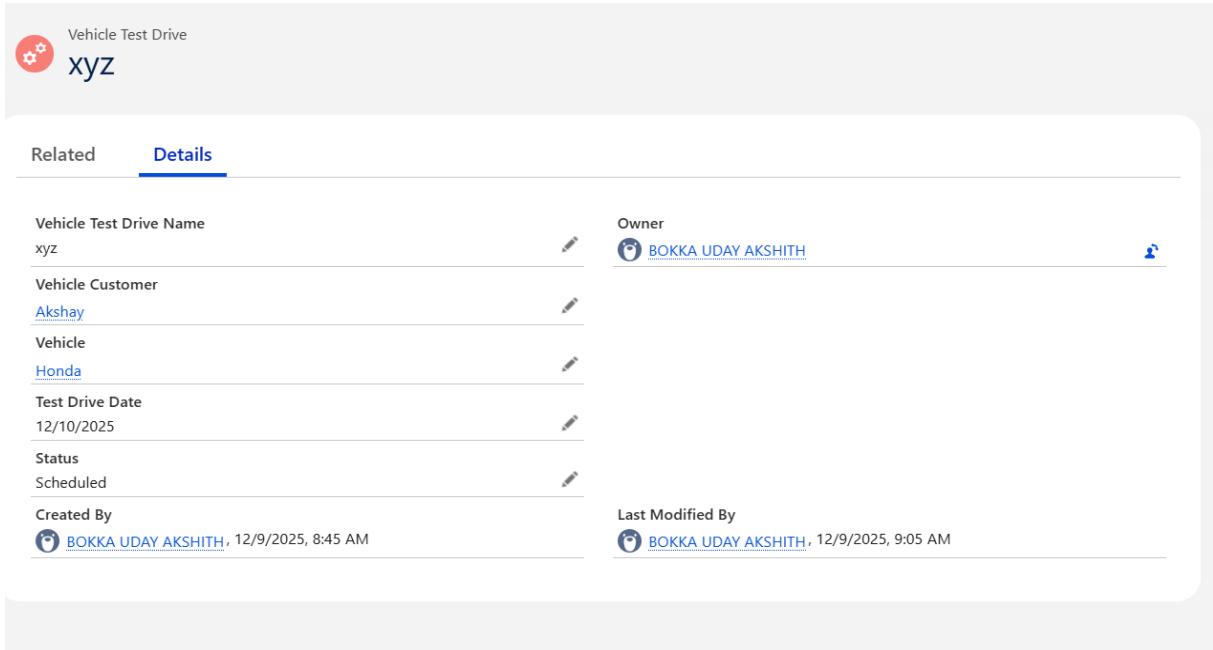
**Fig: Customers in WhatNext Vision Motors**

WhatNext Vision Motors    [Vehicle Customers](#) [Vehicle Dealers](#) [Vehicle Orders](#) [Vehicle Service Requests](#) [Vehicle Test](#)

**Vehicle Order**  
abc

Related	Details
Vehicle Order Name abc	Owner <a href="#">BOKKA UDAY AKSHITH</a>
Vehicle Customer <a href="#">Akshay</a>	
Vehicle <a href="#">Honda</a>	
Order Date 12/10/2025	
Status Confirmed	
Assigned Dealer	
Created By <a href="#">BOKKA UDAY AKSHITH</a> , 12/9/2025, 9:17 AM	Last Modified By <a href="#">BOKKA UDAY AKSHITH</a> , 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.