Salesforce CRM Project Documentation

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

Project Overview

WhatNext Vision Motors. This project aims to develop an automotive platform that enhances convenience, safety, and efficiency for everyday use. Core functionalities include real-time vehicle monitoring, streamlined user interaction through a mobile interface, and optimized performance supported by data-driven decision-making. By incorporating emerging technologies and forward-looking design principles, Vision Motors aims to address current challenges in mobility—such as congestion, maintenance inefficiencies, and fragmented user experiences. This documentation outlines the project's concept, system architecture, key features, and potential impact, demonstrating how Vision Motors contributes to the future of accessible and smarter transportation.

Objectives

1. **Automate Order and Dealer.** Automatically assign the nearest dealer based on the customer's location at the time of order placement.
2. **Prevention of Out-of-Stock Orders**. Restrict placing orders for vehicles when out of stock
3. **Test Drive Reminders**. Schedule automated emails to remind customers about their upcoming test drives.

Detailed Execution of Project Phases

1. Developer Org Setup
   Salesforce Developer Org was created using
   https://developer.salesforce.com/signup
   Account was verified, password reset, and granted access to the Salesforce Setup Page.

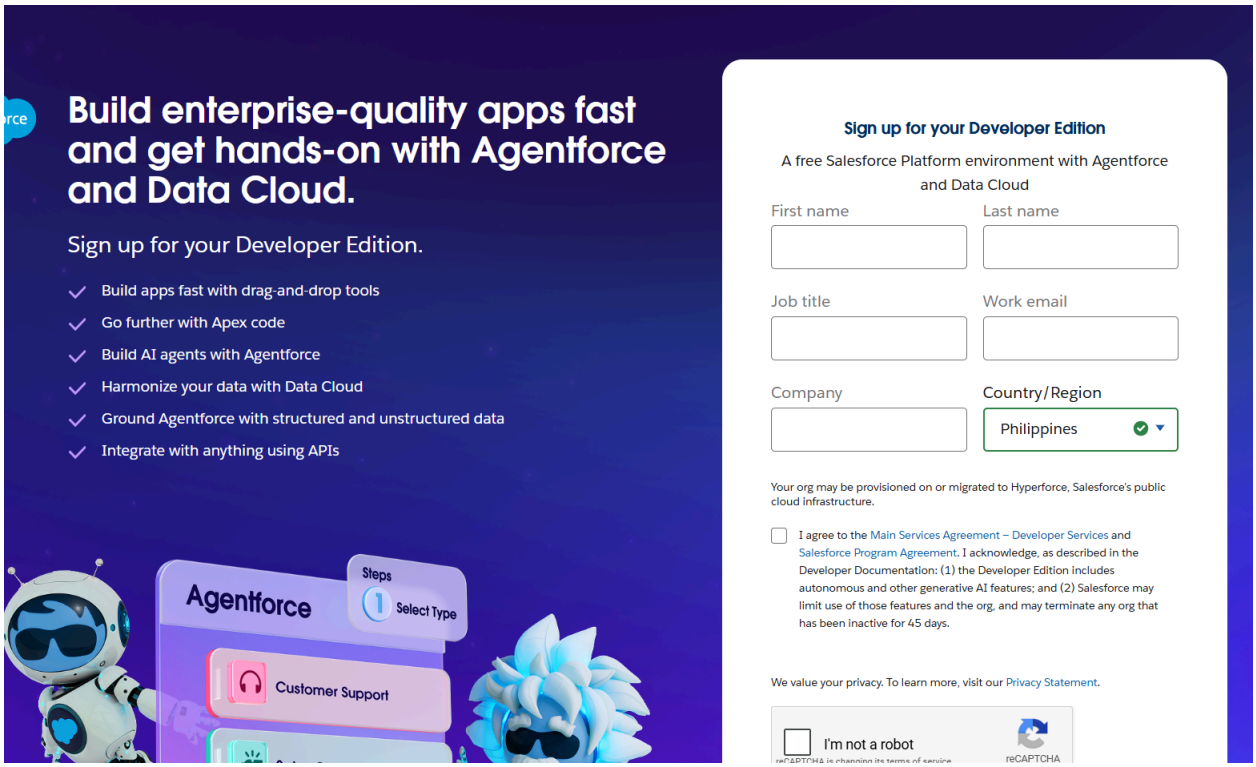

Figure 1. Sign up for Developer

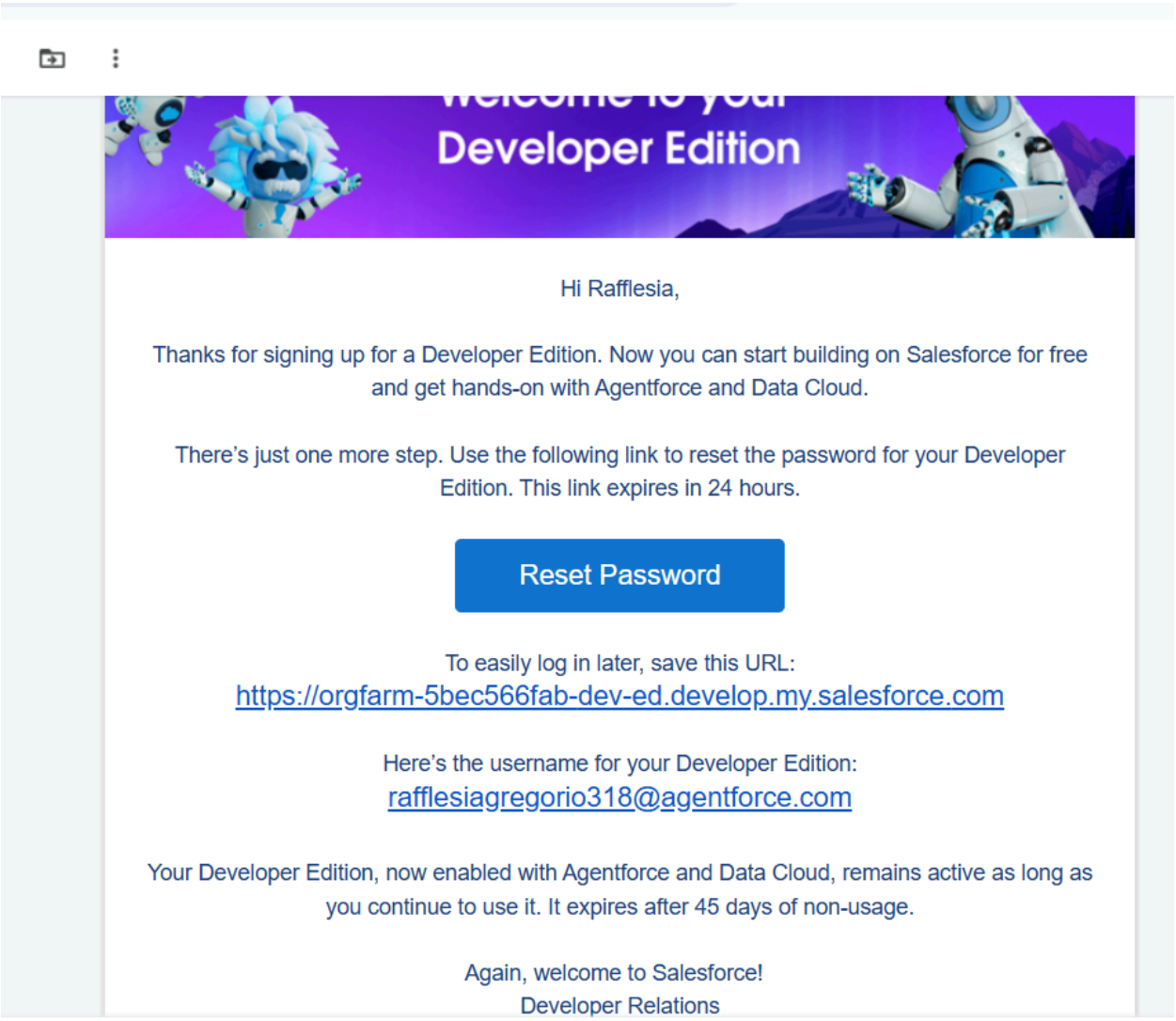

Figure 2. Password Reset

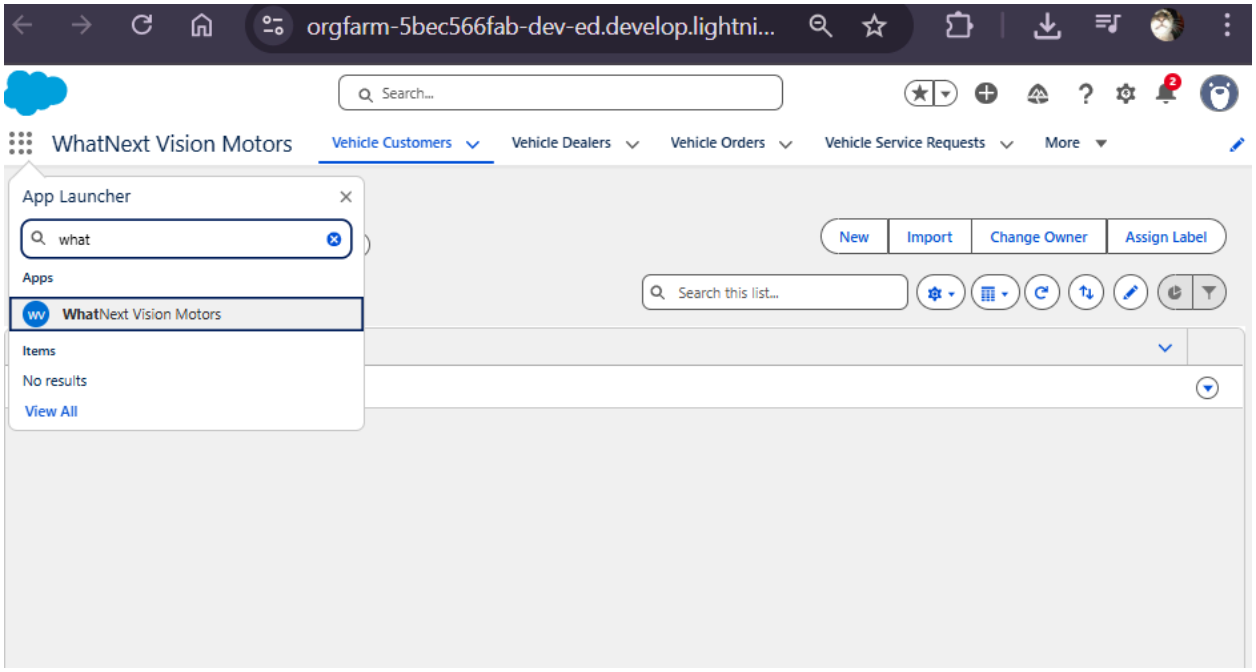

Figure 3. Creating Lightning App

A custom Lightning app named WhatNext Vision Motors

Included Tabs: Vehicle Customers, Vehicle Dealers, Vehicle Orders, Vehicles, Vehicle Service Request, Vehicle Test Drivers, Reports, and Dashboard

2. Custom Object Creation

- Vehicle: Contains details about each vehicle and its availability.
- Vehicle Dealer: Holds information about dealerships.
- Vehicle Customer: Records customer profiles and contact information.
- Vehicle Order: Tracks and manages vehicle purchase orders.
- Vehicle Test Drive: Schedules and monitors test drive appointments.
- Vehicle Service Request: Logs and oversees vehicle maintenance and service history.

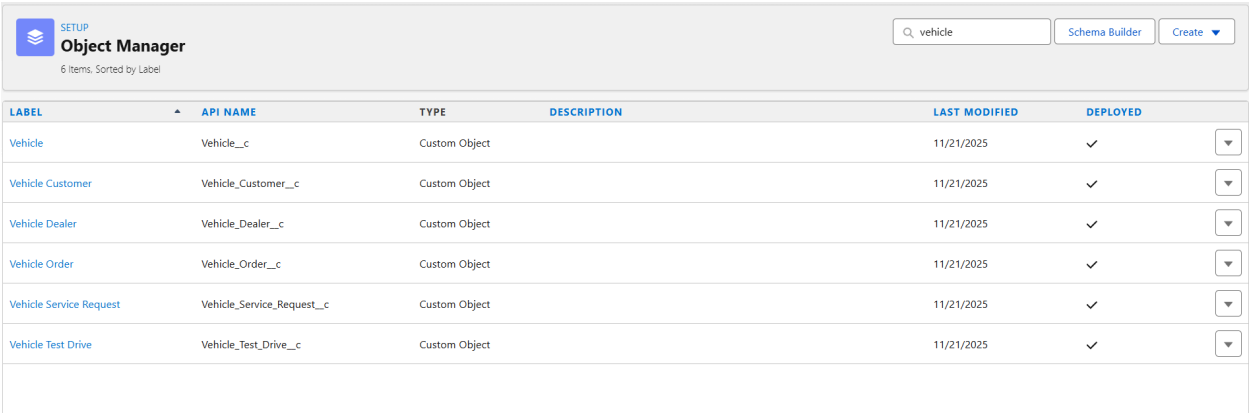

Figure 4. Custom Object Manager

Figure 5. Custom Object Tabs

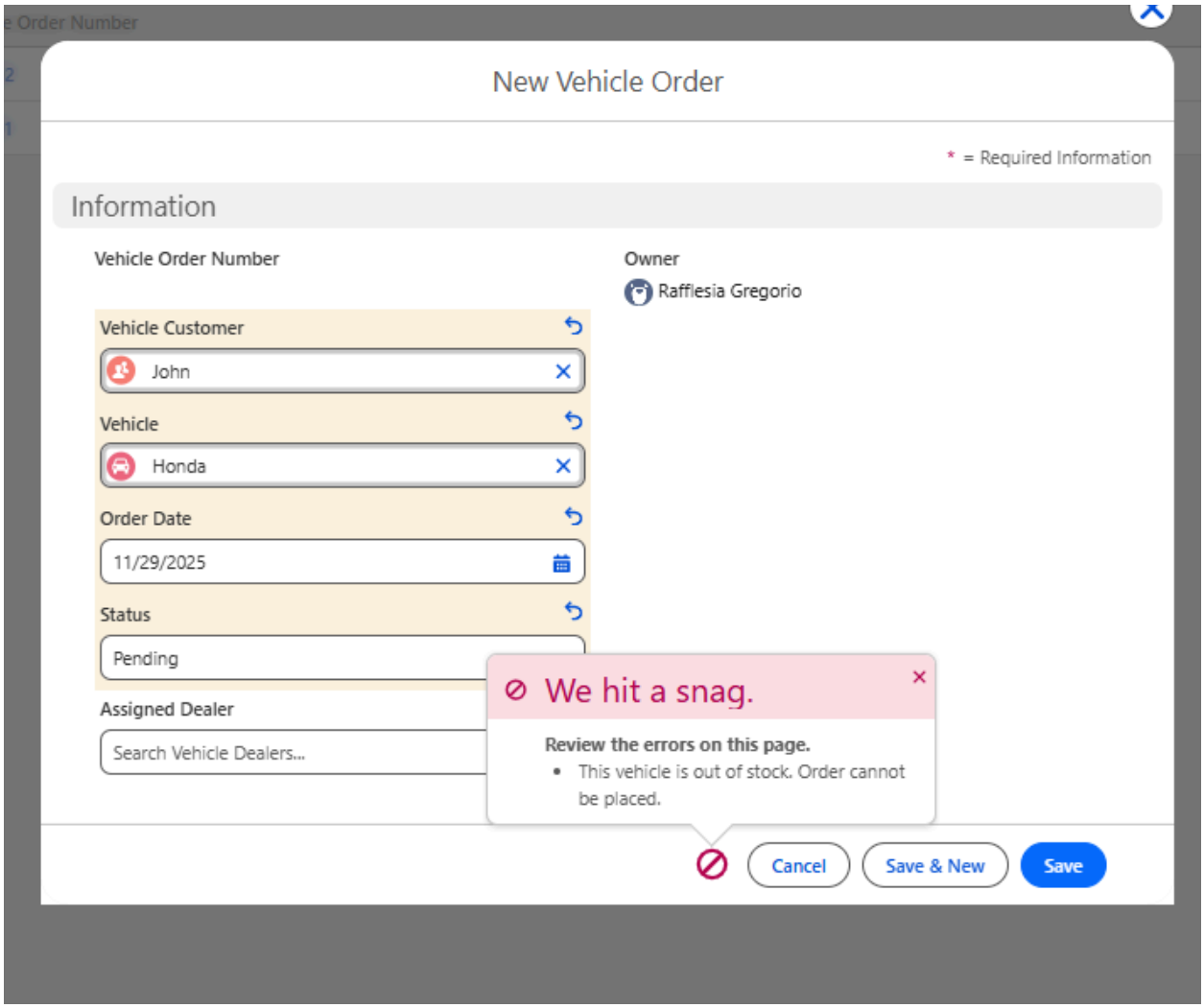

Figure 6. Validation Rules
Prevents creating an order if the user wants to, and an error will appear, and won't proceed.

Flow 1: Auto-Assigned Dealer
The flow works on Vehicle_Order__c
Customer information will be fetched
Finds the nearest dealer to the customer and assigns it to the customer's order.

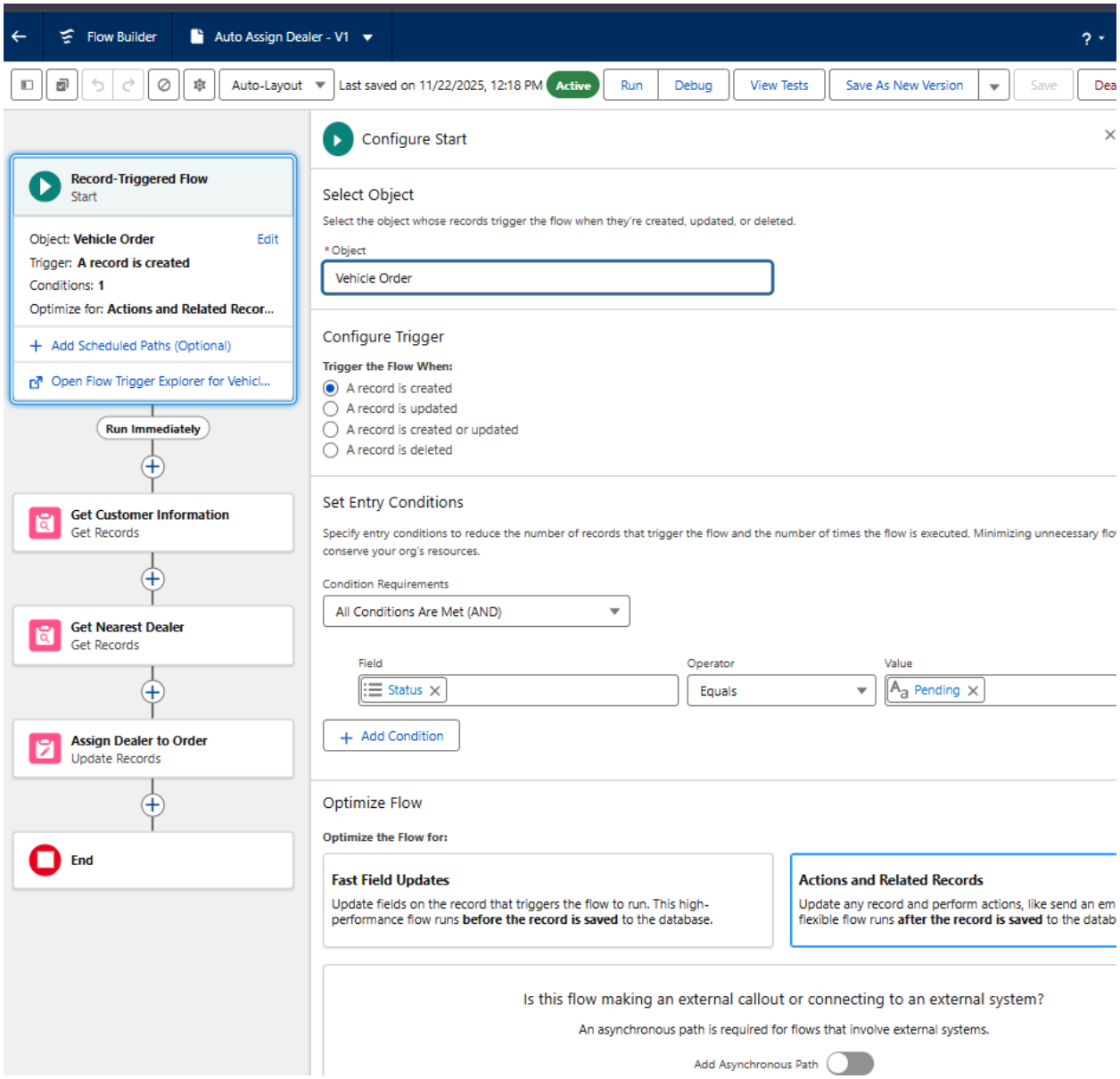

Figure 6. Auto Assign Dealer Flow

Flow 2: Test Drive Reminder
This flow works on Vehicle_Test_Drive__c
A reminder will be sent to the user for the upcoming test drive, and the email will show how successful it's implemented.

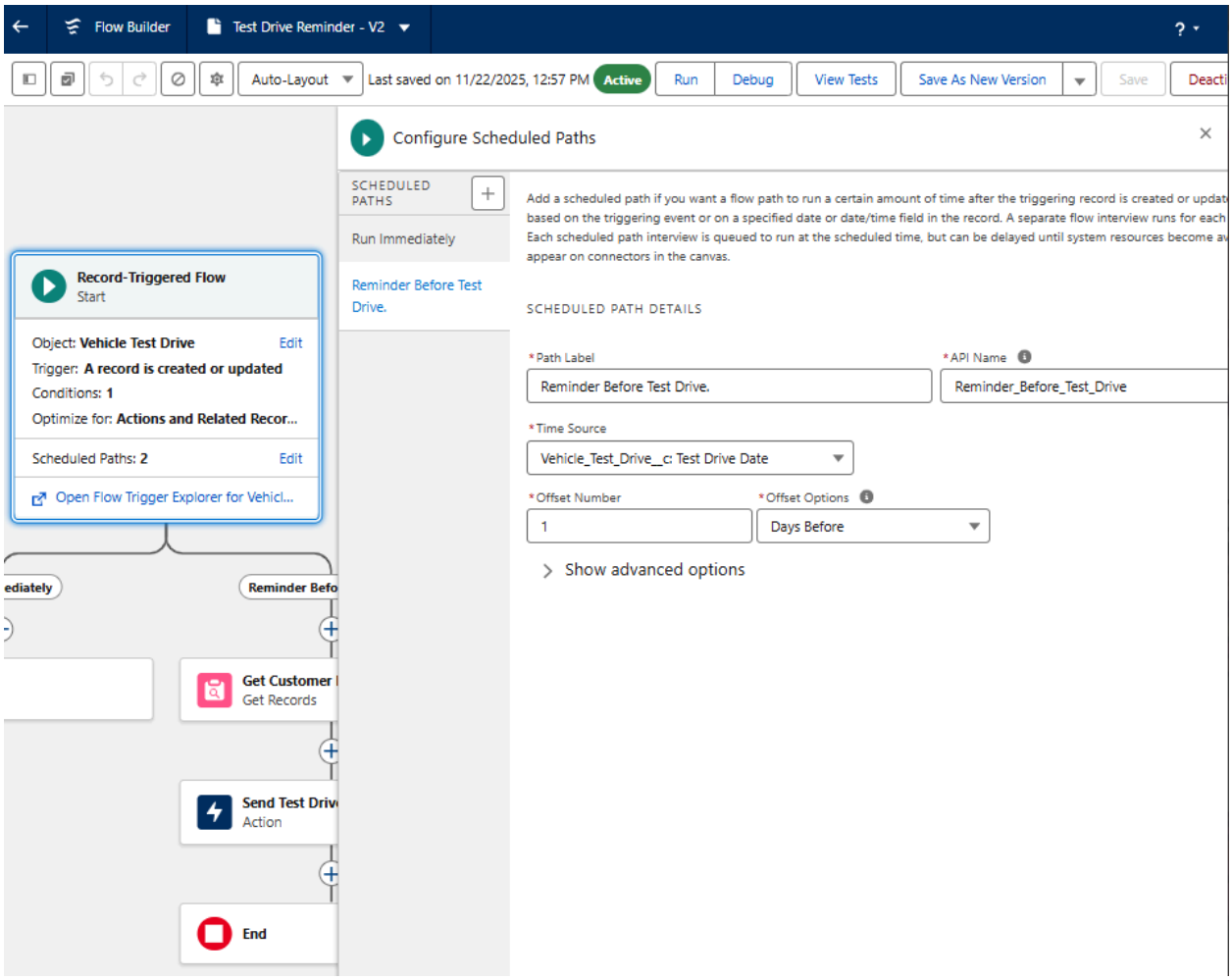

Figure 7. Test Drive Reminder Flow

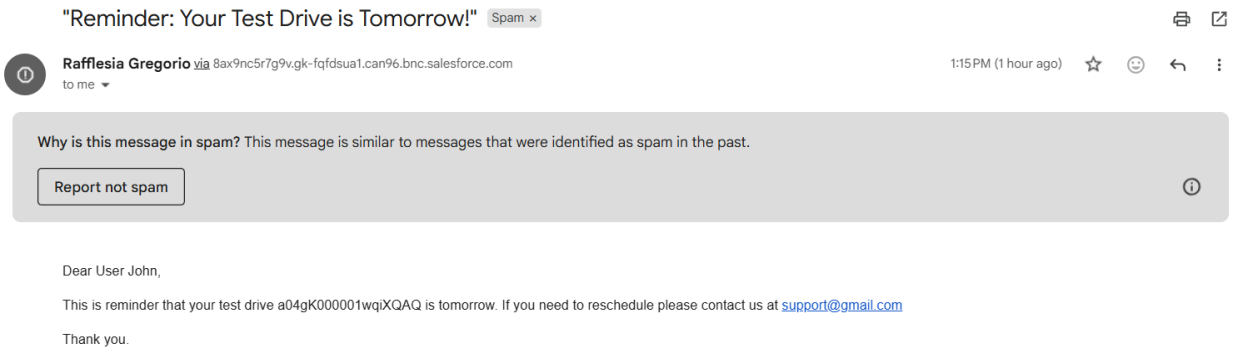

Figure 8. Email Sent for Reminder

Apex Trigger and Handler

The figure shown is the handler or codes to prevent ordering and update the stock when the order is confirmed.

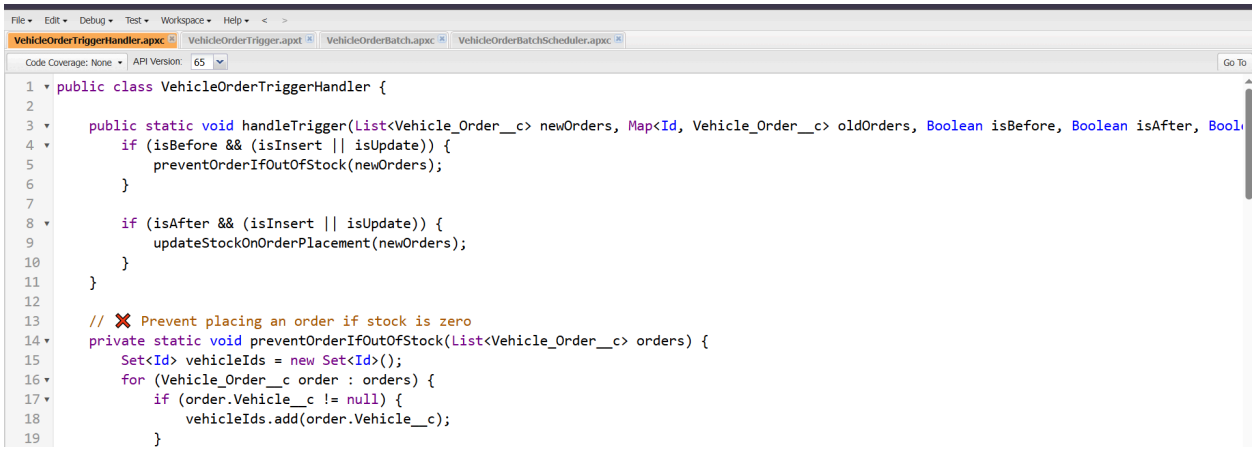

Figure 9. Vehicle Order Trigger Handler

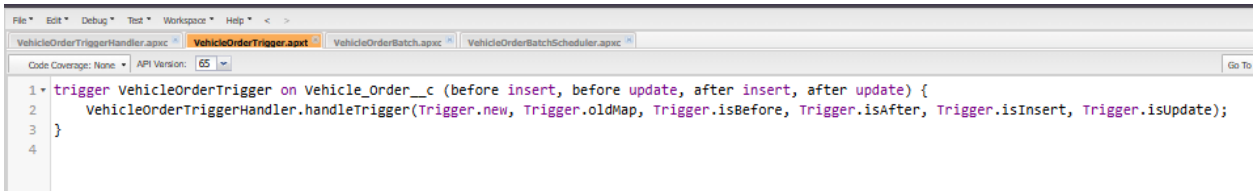

Figure 10. Vehicle Order Trigger

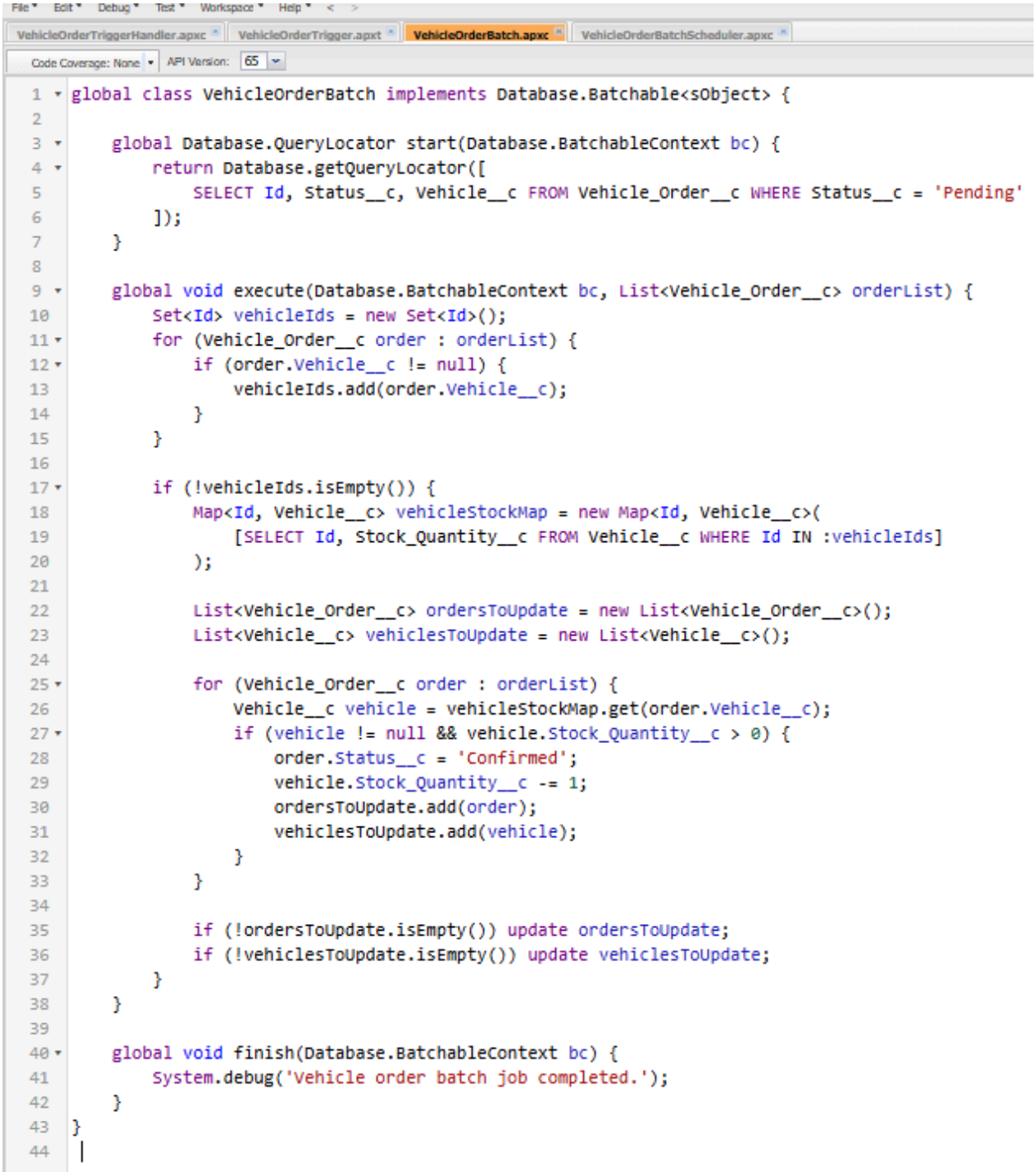

Figure 11. Vehicle Order Batch

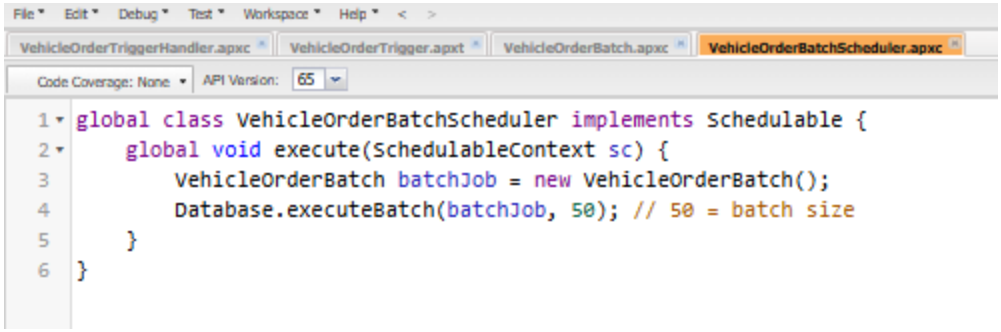

Figure 12. Vehicle Order Batch Scheduler

Real World Example

The following figure is a walkthrough on how to make it organized.

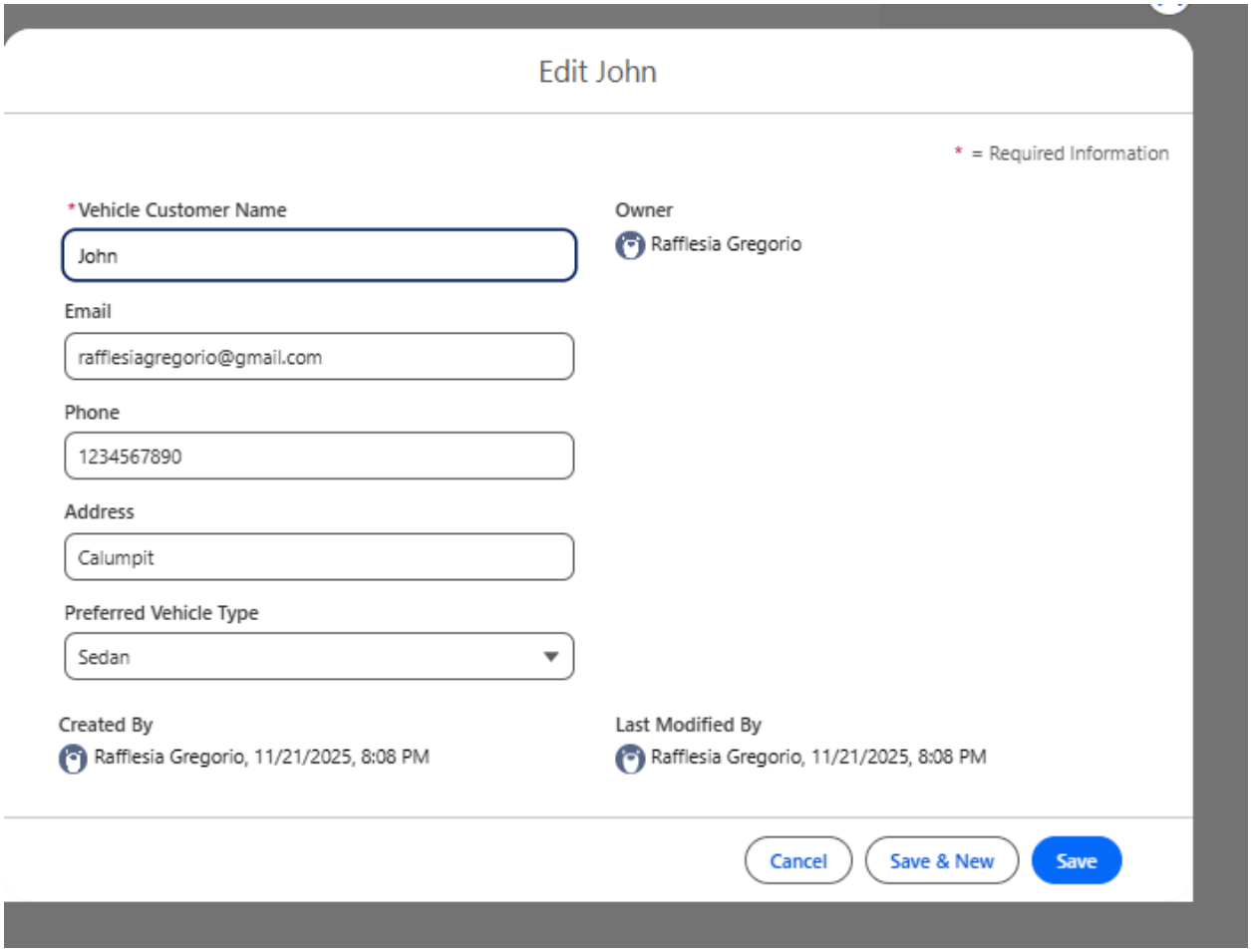

Figure 13. Vehicle Customer

The figure shows the details about the user as well as the vehicle type.

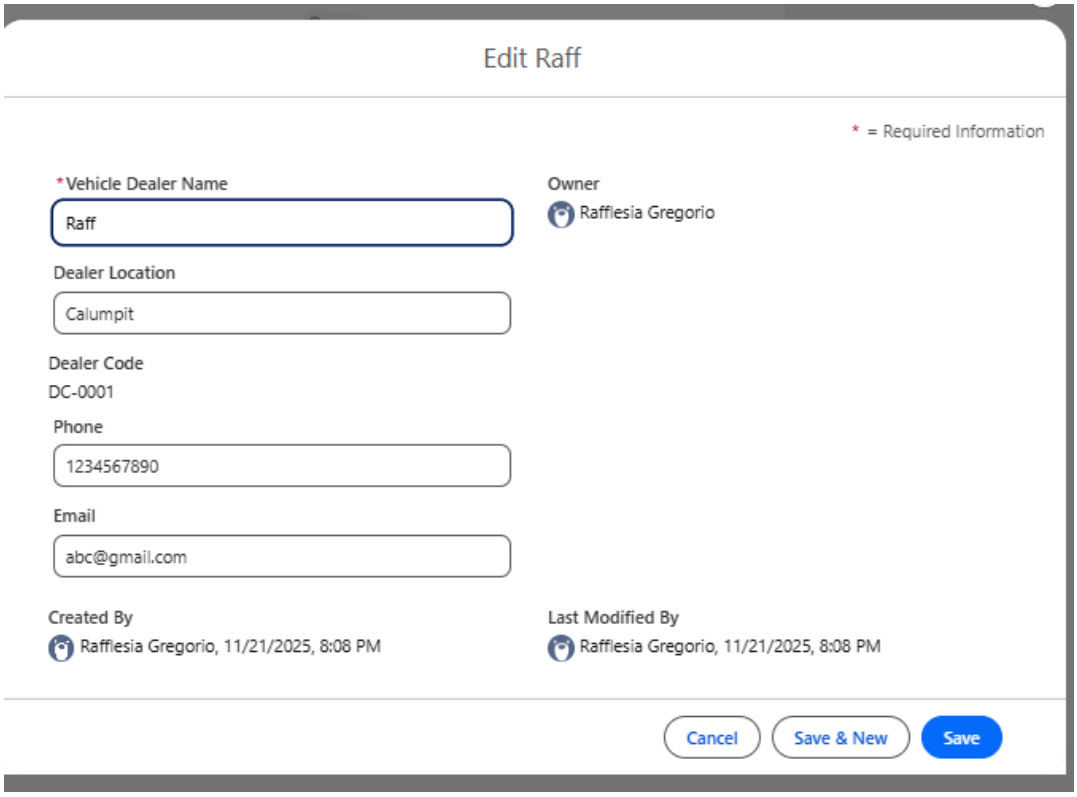

Figure 14. Vehicle Dealers
Holds information about dealerships

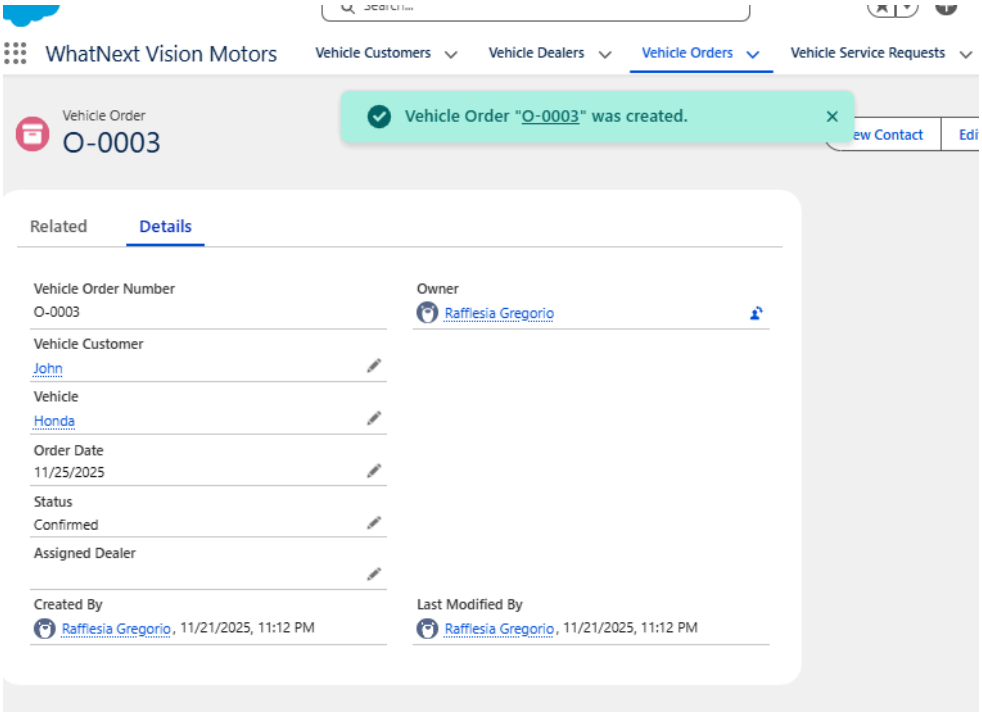

Figure 15. Vehicle Orders
Tracks and manages vehicle purchase orders.

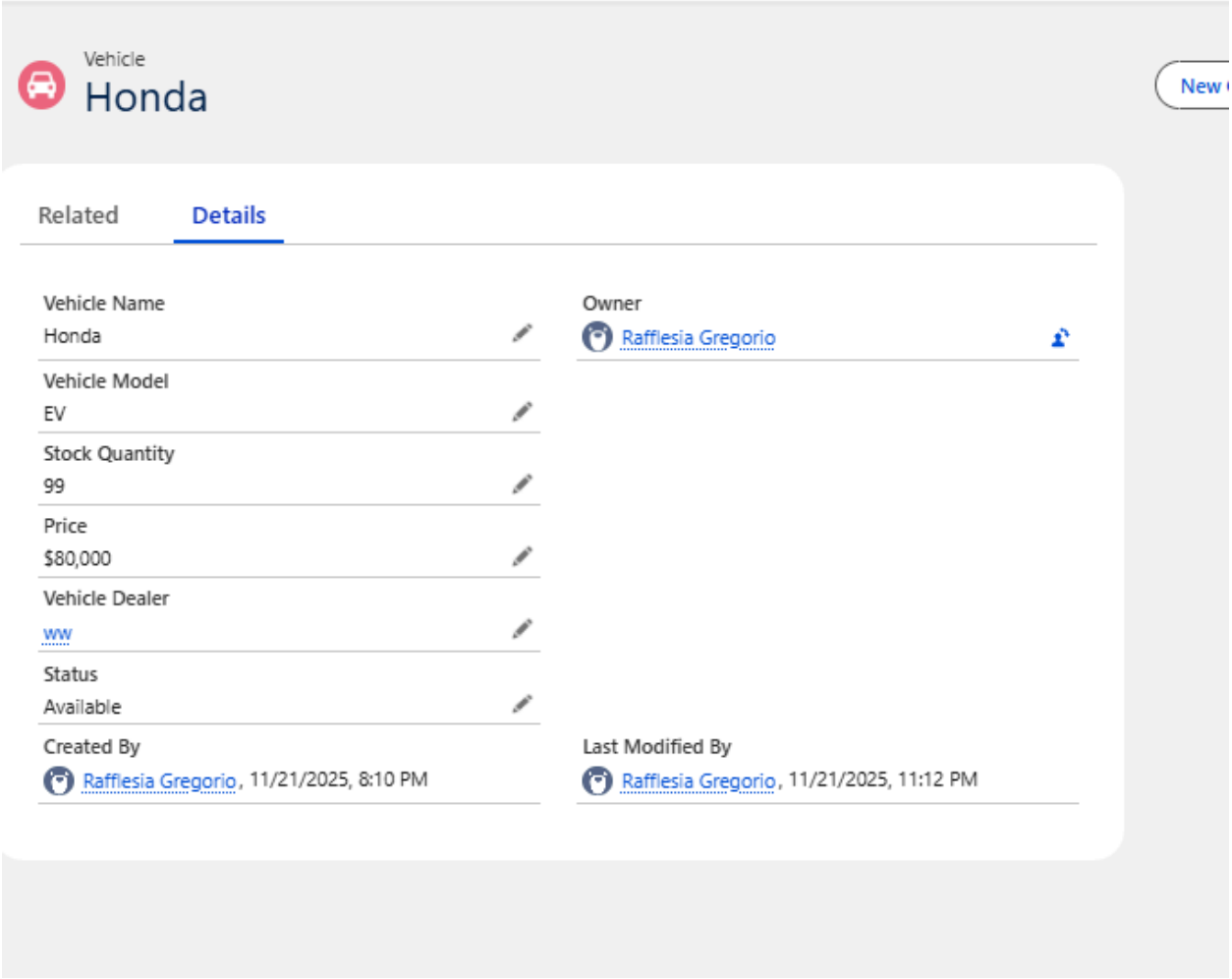

Figure 16. Vehicles
The vehicle order was placed above, and the stock quantity was reduced from 100 to 1 automatically.

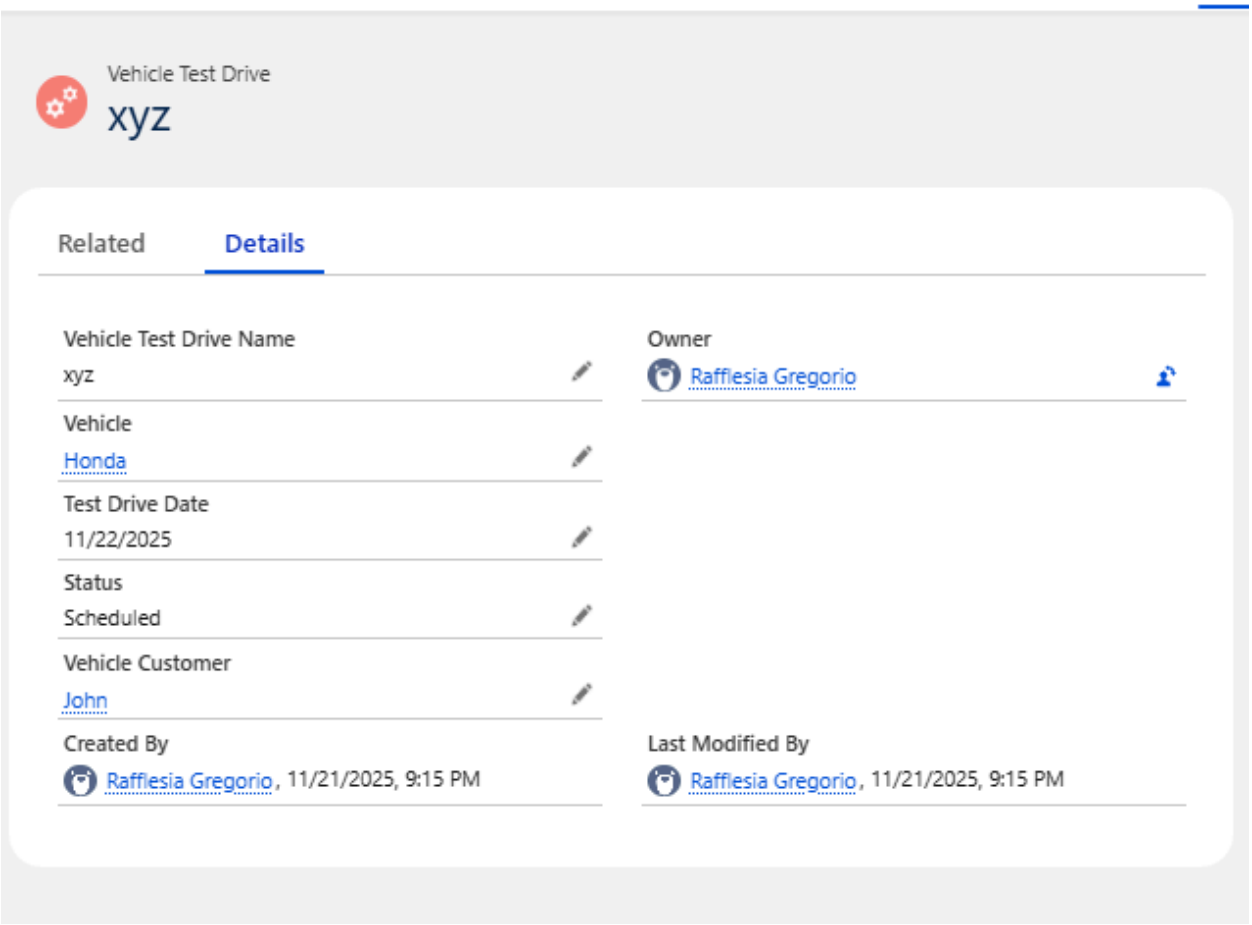

Figure 17. Vehicle Test Drive

The figure shows schedules and monitors test drive appointments, and the vehicle customers are also on the details.

Conclusion

The WhatNext Vision Motors system is built for business processes like vehicle handling, ordering, and application of assigned dealers near the customers, tracking of quantity, as it has been successfully implemented, and the automation of. Through automation, users can structure their orders with minimal errors and provide better service.