

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

Project Documentation

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Project Overview

WhatsNext Vision Motors is revolutionizing its customer experience and operational efficiency with a cutting-edge Salesforce CRM implementation. The project streamlines the vehicle ordering process by auto-assigning orders to the nearest dealer based on customer location and preventing orders for out-of-stock vehicles. Automated workflows update order statuses dynamically and send scheduled email reminders for test drives. Key technical implementations include Apex triggers for stock validation, batch jobs for stock updates, and scheduled Apex for automated order processing. This initiative enhances customer satisfaction, improves order accuracy, and boosts overall operational efficiency.

Objectives

WhatsNext Vision Motors, a pioneering force in the automotive industry, is dedicated to transforming the mobility sector with innovative technology and solutions that prioritize customer needs. The core objective of this Salesforce project is to enhance the customer experience and streamline operational processes. The system improves the vehicle ordering process by automatically suggesting the nearest dealer based on the customer's address and prevents orders for out-of-stock vehicles. Scheduled Apex jobs and automated workflows ensure order accuracy and timely communication through scheduled email reminders for test drives, boosting overall customer satisfaction and operational efficiency.

Phase 1: Requirement Analysis & Planning

- Identified key business needs including improved order accuracy, automated dealer assignment, and real-time stock updates.
- Defined project scope and objectives focusing on customer convenience and dealer efficiency.
- Mapped stakeholders (Sales Team, Dealers, Admins, and Customers).
- Developed a roadmap for automation and Apex-based process optimization.

Phase 2: Salesforce Development – Backend & Configuration

- Customized Objects: Vehicle, Dealer, Customer, Test Drive, and Order.
- Added Validation Rules to prevent orders for out-of-stock vehicles.
- Created Automation through Workflow Rules and Flows for order updates and test drive scheduling.
- Developed Apex Triggers for stock validation and automatic dealer assignment.
- Implemented Scheduled Apex to send automated email reminders one day before the test drive date.
- Built Batch Apex Jobs for periodic vehicle stock updates and order status synchronization.

Phase 3: UI/UX Development & Customization

- Designed the Lightning App 'WhatNext Vision Motors CRM' for organized navigation.
- Configured dynamic page layouts and record pages for Orders, Dealers, and Vehicles.
- Added a Test Drive module with dynamic forms for scheduling and management.
- Created Dashboards for Upcoming Test Drives, Vehicle Availability, and Dealer Performance.
- Integrated automated email reminders within user activity logs for transparency.

Phase 4: Data Migration, Testing & Security

- Imported vehicle and dealer data using Salesforce Data Import Wizard.
- Implemented Profiles, Permission Sets, and Role Hierarchy for secure access.
- Applied Field History Tracking and Duplicate Rules for data integrity.
- Tested automation (flows, triggers, emails) using sample records with documented results.
- Ensured secure and accurate test drive reminder emails were triggered automatically.

Phase 5: Deployment, Documentation & Maintenance

- Deployment was carried out using Salesforce Change Sets from Sandbox to Production.
- Created troubleshooting documentation for common issues such as failed triggers or workflow delays.
- Implemented regular maintenance schedule for reviewing Apex classes and workflows.
- System monitored by admin with version control for Apex updates and bug tracking.

Conclusion

The WhatNext Vision Motors Salesforce CRM project successfully delivered a robust solution that enhances the vehicle ordering process, improves dealer coordination, and ensures customer satisfaction. The system automates critical workflows, including dealer assignment, stock validation, and email reminders for test drives. This implementation demonstrates the power of Salesforce in creating scalable and efficient business solutions while paving the way for future innovations in the automotive industry.