

# Salesforce Project Implementation Report: Vehicle Order Automation

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**Project Title:** Vehicle Order Automation: Shaping the Future of Mobility with Salesforce Automation

## Problem Statement

For this project, my objective is to implement the "WhatNext Vision Motors" system to automate critical vehicle order processing within Salesforce. The core problem I am addressing is the need for a more efficient and intelligent system for managing vehicle orders. Specifically, I need to automate the assignment of orders to the nearest dealers based on customer location, implement logic to prevent orders for out-of-stock vehicles, and ensure timely email reminders are sent for test drives one day before the scheduled date. This project aims to overcome manual inefficiencies and enhance customer experience through robust Salesforce automation, leveraging both Flows and Apex.

## Phase 1: Problem Understanding & Industry Analysis

### 1.1. Executive Summary

The "Vehicle Order Automation" project involved the implementation of a custom Salesforce application designed to automate key aspects of vehicle order processing and customer engagement for a motor vehicle company. This project aimed to enhance efficiency and customer satisfaction by leveraging Salesforce's declarative and programmatic capabilities. This document details the step-by-step process I followed to build, configure, and automate the solution.

### 1.2. Requirement Gathering

The project requirements were provided as clear instructions within a Salesforce Virtual Internship (SFVIP2025) workspace. The moto of this project was to automate vehicle order processing using Salesforce, with specific goals outlined.

### 1.3. Business Process Mapping

Based on the provided requirements, I mapped the following core business processes that needed automation:

**Vehicle Order Processing:** Assigning orders to the nearest dealers and preventing orders for out-of-stock vehicles.

Test Drive Scheduling: Sending automated email reminders for test drives.

Vehicle Service Request Management: Though not explicitly detailed in automation, the object was created for future service needs.

#### 1.4. Key Objectives

My main goals for this project were:

To assign vehicle orders to the nearest dealers based on the customer's location.

To prevent the creation of orders for vehicles that are out of stock.

To send email reminders for test drives one day before the scheduled date.

To achieve these objectives using a combination of Salesforce Flows and Apex.

### Phase 2: Org Setup & Configuration

This phase involved setting up the foundational Salesforce environment. The focus was on creating a dedicated space for development and establishing the basic security and access settings required for the application.

- **Salesforce Editions & Dev Org Setup** The project was built using a

**Salesforce Developer Edition** org. This edition was chosen because it is a free, fully-featured environment perfect for building and testing applications without impacting a live production org. A new developer account was signed up and a new org was provisioned specifically for this project.

The screenshot displays the Salesforce Setup interface. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Company Information' and contains the 'Organization Detail' section. Below this, the 'User Licenses' section is visible, showing a table of licenses.

Organization Detail					
Organization Name	Contact Management System	Phone			
Primary Contact	OrgTeam EPIC	Fax			
Division		Default Locale	English (United States)		
Address	United States	Default Language	English		
Fiscal Year Starts In	January	Default Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)		
Activate Multiple Currencies	<input type="checkbox"/>	Currency Locale	English (United States) - USD		
Enable Data Translation	<input type="checkbox"/>	Used Data Space	370 KB (7%) [View]		
Newsletter	<input checked="" type="checkbox"/>	Used File Space	88 KB (0%) [View]		
Admin Newsletter	<input checked="" type="checkbox"/>	API Requests, Last 24 Hours	0 (15,000 max)		
Hide Notices About System Maintenance	<input type="checkbox"/>	Streaming API Events, Last 24 Hours	0 (10,000 max)		
Hide Notices About System Downtime	<input type="checkbox"/>	Restricted Logins, Current Month	0 (0 max)		
Locale Formats	ICU	Salesforce.com Organization ID	00DgI_000007TGdr		
		Organization Edition	Developer Edition		
		Instance	CAN96		
Created By	OrgTeam EPIC, 7/17/2025, 2:52 PM	Modified By	Korbi.MBil, 9/22/2025, 6:42 AM		

User Licenses					
Name	Status	Total Licenses	Used Licenses	Remaining Licenses	Expiration Date
Salesforce	Active	4	3	1	
Analytics Cloud Integration User	Active	2	2	0	
Chatter Free	Active	5,000	1	4,999	
External Apps Login	Active	40	0	40	

- **Company Profile Setup** Upon the creation of the Developer Org, the basic company profile was inherently established. This includes default settings for locale, language, and time zone which are foundational for the org's operation.
- **User Setup & Licenses** The entire project was built and configured using the single, default **System Administrator** user that comes with a new Developer Edition org. This user has the standard Salesforce license, which grants full permissions to build all the necessary components for the project. No other users were created as the scope focused on the application's functionality.
- **Profiles** Profiles were a key part of the configuration for controlling application access. During the setup of the

"WhatNext Vision Motors" **Lightning App**, it was explicitly assigned and made visible only to the **System Administrator** profile. This ensures that only users with this profile can see and use the application.

The image displays two screenshots of the Salesforce Setup interface. The top screenshot shows the 'Permission Sets' page, and the bottom screenshot shows the 'Users' page.

### Permission Sets

On this page you can create, view, and manage permission sets.

View: All Permission Sets | Edit | Delete | Create New View

Action	Permission Set Name	Description	License
<a href="#">Clone</a>	Agentforce Default Admin	Allows users to build and manage in-org copilots.	Agentforce (Default)
<a href="#">Clone</a>	Agentforce Service Agent Configuration	Build and manage autonomous AI service agents.	Agentforce Service Agent Builder
<a href="#">Clone</a>	Agentforce Service Agent Object Access	Access knowledge articles and manage cases and contacts as an auto...	Agentforce Service Agent User
<a href="#">Clone</a>	Agentforce Service Agent Secure Base	Set up and use Agentforce Service Agent actions with enhanced data s...	Agentforce Service Agent User
<a href="#">Clone</a>	Agentforce Service Agent User	Analyze topics and perform actions as an autonomous AI service agent.	Agentforce Service Agent User
<a href="#">Clone</a>	Authenticated Partner	An authenticated external user with the ability to make and manage thei...	Salesforce Payments External
<a href="#">Clone</a>	Buyer	Allows access to the store. Lets users see products and categories, ma...	B2B Buyer Permission Set One Seat
<a href="#">Clone</a>	Buyer Manager	Includes all Buyer capabilities, and allows access to manage carts and ...	B2B Buyer Manager Permission Set One Seat
<a href="#">Clone</a>	C360 High Scale Flow Integration User	Allows integration user to access features specific to C360 High Scale ...	Cloud Integration User
<a href="#">Clone</a>	CRM User	Denotes that the user is a Sales Cloud or Service Cloud user.	CRM User
<a href="#">Clone</a>	Code Builder User	Enables the user to create and access Code Builder environments.	Code Builder
<a href="#">Clone</a>	Commerce Admin	Allow access to commerce admin features.	Commerce Admin Permission Set License Seat
<a href="#">Clone</a>	Commerce Session	Allow access to session-based permissions.	Commerce Session Permission Set License Seats
<a href="#">Clone</a>	ConnectivityServiceCASCPermSet		Cloud Integration User
<a href="#">Clone</a>	Contact Center Admin	Manage Service Cloud Voice contact centers that use Amazon Connect...	Service Cloud Voice User
<a href="#">Clone</a>	Contact Center Admin (Partner Telephony)	Manage Service Cloud Voice contact centers that use your preferred tel...	Service Cloud Voice User (Partner Telephony)

### Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users | Edit | Create New View

Action	Full Name	Alias	Username	Role	Active	Profile
<a href="#">Edit</a>	Chatter Expert	Chatter	chatter.0009000007gduag.4xvycxd13h@chatter.salesforce.com		✓	Chatter Free User
<a href="#">Edit</a>   <a href="#">Login</a>	EPIC_OrgFarm	OEPIK	epic.3fc3661ca20@orgfarm.salesforce.com		✓	System Administrator
<a href="#">Edit</a>   <a href="#">Login</a>	Mithil	mith	scokimth2002@gmail.com	Test Role	✓	System Administrator
<a href="#">Edit</a>	Mithil Kone	kone	scokimth2002s42@agentforce.com		✓	System Administrator
<a href="#">Edit</a>   <a href="#">Login</a>	Project Admin	adon	system22@w.com		✓	Standard Platform User
<a href="#">Edit</a>	User Integration	inter	integration@000at00007gduag.com		✓	Analytics Cloud Integration User
<a href="#">Edit</a>	User Security	sec	insightsecurity@000at00007gduag.com		✓	Analytics Cloud Security User

### Phase 3: Data Modeling & Relationships

This phase was the cornerstone of the project, focused on building a logical and scalable data structure. A custom data model was created to store and connect all information about vehicles, dealers, customers, and their transactions within Salesforce.

- **Standard & Custom Objects** The application's foundation is built entirely on **custom objects**. Standard objects like Accounts or Contacts were not used to ensure the solution was tailored specifically to the automotive business process. Six custom objects were created:
  - **Vehicle\_\_c**: To store details of each car, including model, price, and inventory.
  - **Vehicle\_Dealer\_\_c**: To manage dealership information and locations.
  - **Vehicle\_Customer\_\_c**: To maintain a database of prospective and existing customers.
  - **Vehicle\_Order\_\_c**: A transactional object to track sales orders.
  - **Vehicle\_Test\_Drive\_\_c**: To schedule and manage customer test drives.
  - **Vehicle\_Service\_Request\_\_c**: To handle after-sales service requests.
- **Fields** Numerous custom fields were created on each object to capture essential business data. Various data types were used to ensure data integrity, including:
  - **Picklist**: For predefined values like the **Status\_\_c** field on the **Vehicle Order** object (e.g., Pending, Confirmed, Delivered).
  - **Number & Currency**: For quantitative data like **Stock\_Quantity\_\_c** and **Price\_\_c** on the **Vehicle** object.
  - **Auto-Number**: To create a unique, system-generated ID for records like the **Vehicle\_Order\_Number\_\_c**.
  - **Lookup Relationship**: Used to link objects together (detailed below).

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Vehicle	Vehicle__c	Custom Object		9/25/2025	✓
Vehicle Customer	Vehicle_Customer__c	Custom Object		9/25/2025	✓
Vehicle Dealer	Vehicle_Dealer__c	Custom Object		9/25/2025	✓
Vehicle Order	Vehicle_Order__c	Custom Object		9/25/2025	✓
Vehicle Service Request	Vehicle_Service_Request__c	Custom Object		9/25/2025	✓
Vehicle Test Drive	Vehicle_Test_Drive__c	Custom Object		9/25/2025	✓

- **Schema Builder** While the objects and fields were configured in the Object Manager, the **Schema Builder** is the best tool for visualizing the complete data

model. It provides a clear, graphical diagram showing all the custom objects and how they are connected through their relationship fields.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
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)		✓

- **Lookup vs Master-Detail vs Hierarchical Relationships** The project exclusively used

**Lookup relationships** to create connections between objects. This type of relationship creates a flexible link where the related records can exist independently.

- **Example:** A **Vehicle Order** record has a lookup field to the **Vehicle Customer** object.
- **Reasoning:** Lookups were chosen over Master-Detail because the objects are not tightly dependent. For instance, a **Vehicle Customer** can exist in the system even if they have never placed an order. Master-Detail relationships, which create a parent-child dependency, were not suitable for this model. Hierarchical relationships were not applicable.

[Setup](#) > [Object Manager](#)  

## Vehicle Dealer

	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Details	<b>Fields &amp; Relationships</b> 8 Items, Sorted by Field Label			
Page Layouts	Created By	CreatedById	Lookup(User)	
Lightning Record Pages	Dealer Code	Dealer_Code__c	Auto Number	
Buttons, Links, and Actions	Dealer Location	Dealer_Location__c	Text(60)	
Compact Layouts	Email	Email__c	Email	
Field Sets	Last Modified By	LastModifiedById	Lookup(User)	
Object Limits	Owner	OwnerId	Lookup(User,Group)	
Record Types	Phone	Phone__c	Phone	
Related Lookup Filters	Vehicle Dealer Name	Name	Text(80)	
Search Layouts				
List View Button Layout				
Restriction Rules				
Scoping Rules				
Object Access				

## Phase 4: Process Automation

### 4.1. Email Templates & Alerts (Used in Flows)

Although explicit email templates were not shown being created in the Classic Email Templates section, the video demonstrated the creation of email bodies directly within the Flow Builder. An "Email Action" was configured within the "Test Drive Reminder" flow to send a reminder email.

email tem

▼ Email

- Classic Email Templates
- Lightning Email Templates

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Try using Global Search.

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**SETUP**

## Classic Email Templates

[Help for this Page](#)

Text Email Template  
**Interaction\_Positive\_Alert**

Preview your email template below:

Email Template Detail		<a>Edit</a> <a>Delete</a> <a>Clone</a>
Email Templates from Salesforce	Untitled Public Classic Email Templates	
Email Template Name	Interaction_Positive_Alert	Available For Use <input type="checkbox"/>
Template Unique Name	Interaction_Positive_Alert	Last Used Date
Encoding	Unicode (UTF-8)	Times Used
Author	Konki Mithi <a href="#">[Change]</a>	
Description		
Created By	Konki Mithi 9/23/2025, 11:43 AM	Modified By Konki Mithi 9/23/2025, 11:44 AM
	<a>Edit</a> <a>Delete</a> <a>Clone</a>	

**Email Template** [Send Test and Verify Merge Fields](#)

**Subject** Positive Interaction Recorded for {!ContactName}

**Plain Text Preview**

A new Interaction has been logged as Positive for Contact {!ContactName}.  
 Date: {Interaction\_History\_\_c.Date\_\_c}  
 Notes: {Interaction\_History\_\_c.Notes\_\_c}

## 4.2. Automation Engine: Flow Builder

I implemented two key flows to automate critical business processes.

#### 4.2.1. Record-Triggered Flow: Auto-Assign Dealer

**Objective:** To automatically assign a vehicle order to the nearest dealer based on the customer's location.

**Trigger:** Fires when a Vehicle Order record is created or updated.

**Entry Criteria:** Status field is "Pending".

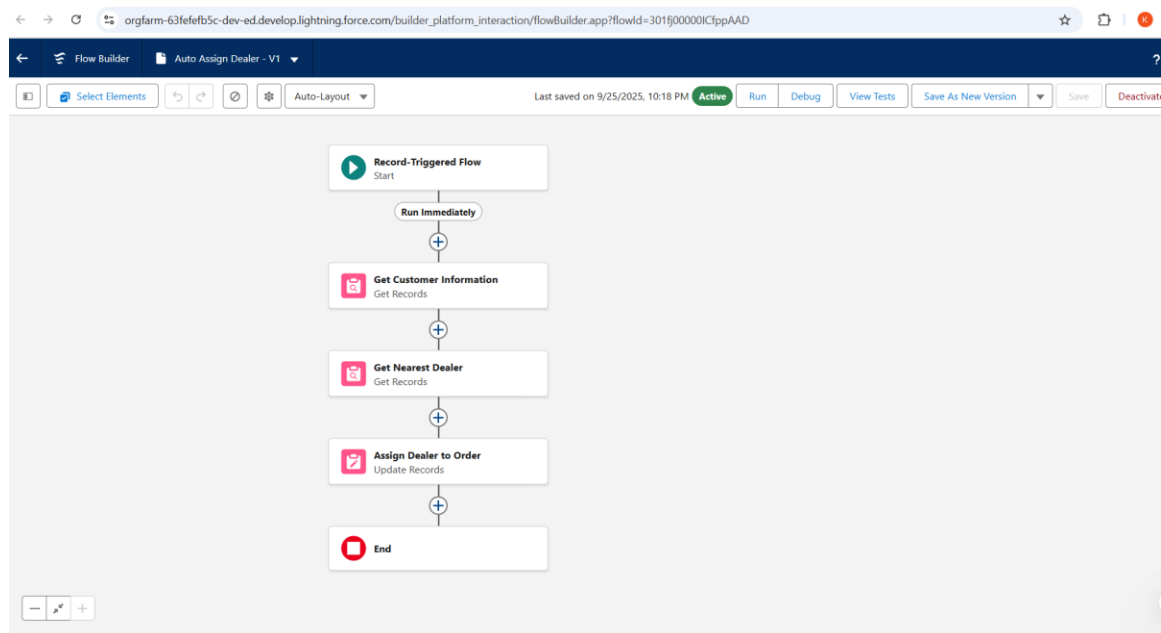
**Logic:**

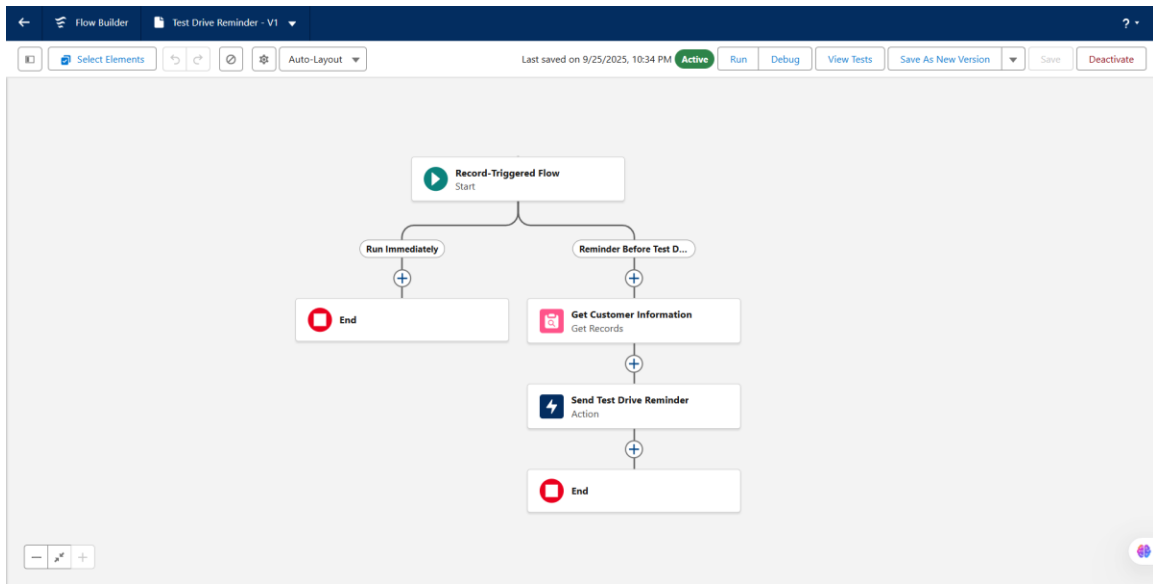
**Get Customer Information:** Fetches the Vehicle Customer record associated with the order to get their Address.

**Get Nearest Dealer:** Queries Vehicle Dealer records to find a dealer whose Location matches the customer's Address.

**Update Records:** Updates the Assigned Dealer lookup field on the Vehicle Order record with the ID of the found dealer.

**Testing:** Demonstrated by creating a Vehicle Order with a customer in "Hyderabad," and the flow correctly assigned the "EM" dealer, also located in "Hyderabad".





#### 4.2.2. Record-Triggered Flow: Test Drive Reminder

Objective: To send an email reminder to the customer one day before their scheduled test drive.

Trigger: Fires when a Vehicle Test Drive record is created or updated.

Entry Criteria: Status field is "Scheduled".

Scheduled Path: Configured to run "1 Day Before" the Test Drive Date.

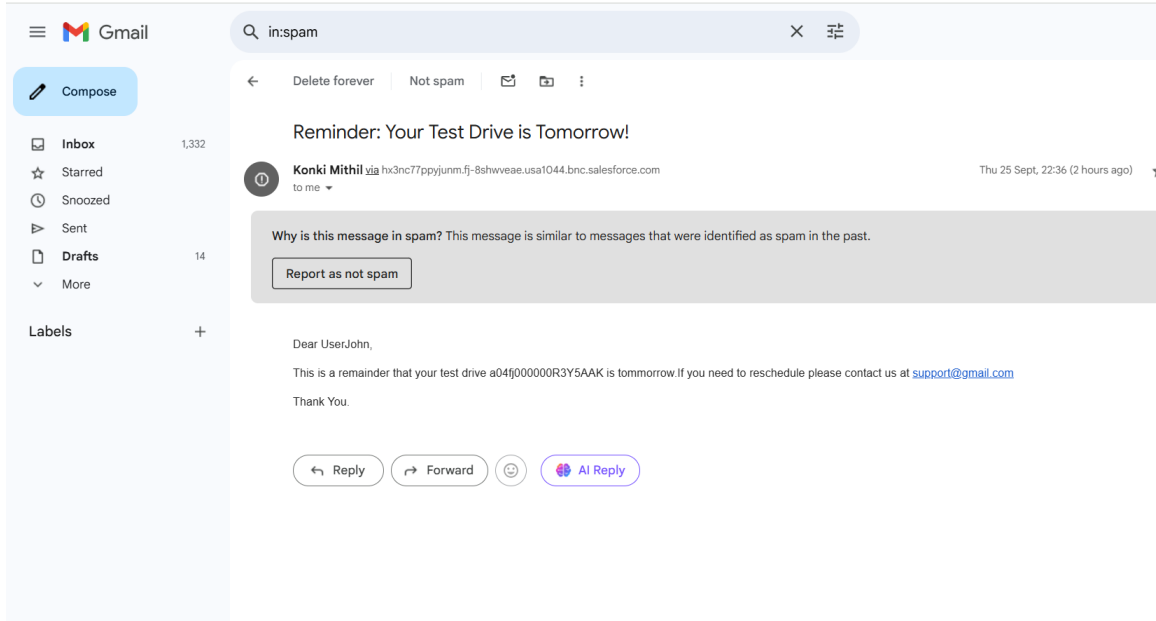
Logic (within scheduled path):

Get Customer Information: Fetches the Vehicle Customer record to retrieve the customer's email and name.

Send Email: Sends an email with the subject "Reminder: Your test drive is tomorrow" and a personalized body including the customer's name and test drive ID.

Testing: Demonstrated by creating a Vehicle Test Drive for "tomorrow" with a "Scheduled" status, and the email was immediately received (due to immediate processing in debug/demo context).





## Phase 5: Apex Programming (Developer)

### 5.1. Apex Trigger: Vehicle Order Processing

I implemented an Apex trigger and a handler class to manage complex logic on Vehicle Order records.

VehicleOrderTriggerHandler Apex Class: This class contains the actual business logic.

Stock Deduction: When a Vehicle Order is updated and its Status changes to "Confirmed," this logic reduces the Stock Quantity of the associated Vehicle record by 1.

Out-of-Stock Prevention: Before an order is created or updated, this logic checks if the Stock Quantity of the selected Vehicle is 0. If it is, it prevents the order from being saved and displays an "out of stock" error message.

VehicleOrderTrigger Apex Trigger: This trigger invokes the handler class on before insert, before update, after insert, and after update events on the Vehicle Order object.

VehicleOrderTriggerHandler.apxcVehicleOrderTrigger.apxtVehicleOrderBatch.apxcVehicleOrderBatchScheduler.apxc

Code Coverage: NoneAPI Version: 64Go To

```
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.Vehicle__c != null) {
18             vehicleIds.add(order.Vehicle__c);
19         }
20     }
21
22     if (!vehicleIds.isEmpty()) {
23         Map<Id, Vehicle__c> vehicleStockMap = new Map<Id, Vehicle__c>(
24             [SELECT Id, Stock_Quantity__c FROM Vehicle__c WHERE Id IN :vehicleIds]
25         );
26
27         for (Vehicle_Order__c order : orders) {
28             Vehicle__c vehicle = vehicleStockMap.get(order.Vehicle__c);
29             if (vehicle != null && vehicle.Stock_Quantity__c <= 0) {
30                 order.addError('This vehicle is out of stock. Order cannot be placed.');
```

LogsTestsCheckpointsQuery EditorView StateProgressProblems

User	Application	Operation	Time	Status	Read	Size
Konki Mithl	Browser	/aura	9/25/2025, 10:43:50 PM	Success	Unread	7.9 KB
Konki Mithl	Unknown	common.api.soap.DirectSoap	9/25/2025, 10:43:50 PM	Success	Unread	528 bytes
Konki Mithl	Browser	/aura	9/25/2025, 10:42:26 PM	Success	Unread	16.54 KB
Konki Mithl	Unknown	common.api.soap.DirectSoap	9/25/2025, 10:42:26 PM	Success	Unread	524 bytes

FileEditDebugTestWorkspaceHelp

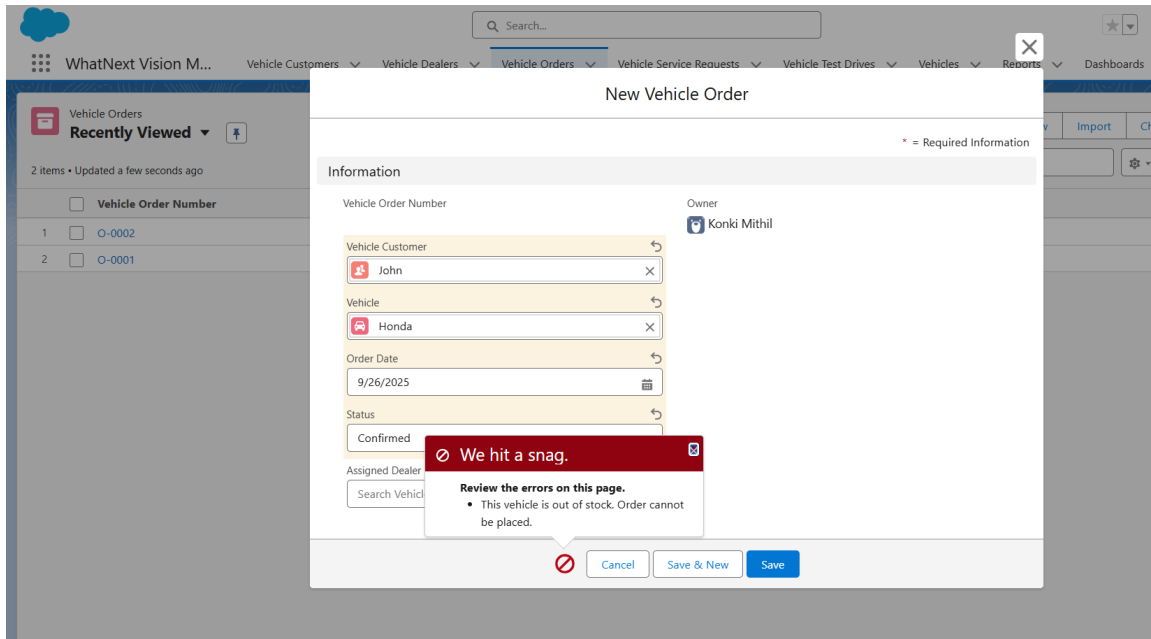
VehicleOrderTriggerHandler.apxcVehicleOrderTrigger.apxtVehicleOrderBatch.apxcVehicleOrderBatchScheduler.apxc

Code Coverage: NoneAPI Version: 64Go To

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

LogsTestsCheckpointsQuery EditorView StateProgressProblems

User	Application	Operation	Time	Status	Read	Size
Konki Mithl	Browser	/aura	9/25/2025, 10:43:50 PM	Success	Unread	7.9 KB
Konki Mithl	Unknown	common.api.soap.DirectSoap	9/25/2025, 10:43:50 PM	Success	Unread	528 bytes
Konki Mithl	Browser	/aura	9/25/2025, 10:42:26 PM	Success	Unread	16.54 KB
Konki Mithl	Unknown	common.api.soap.DirectSoap	9/25/2025, 10:42:26 PM	Success	Unread	524 bytes

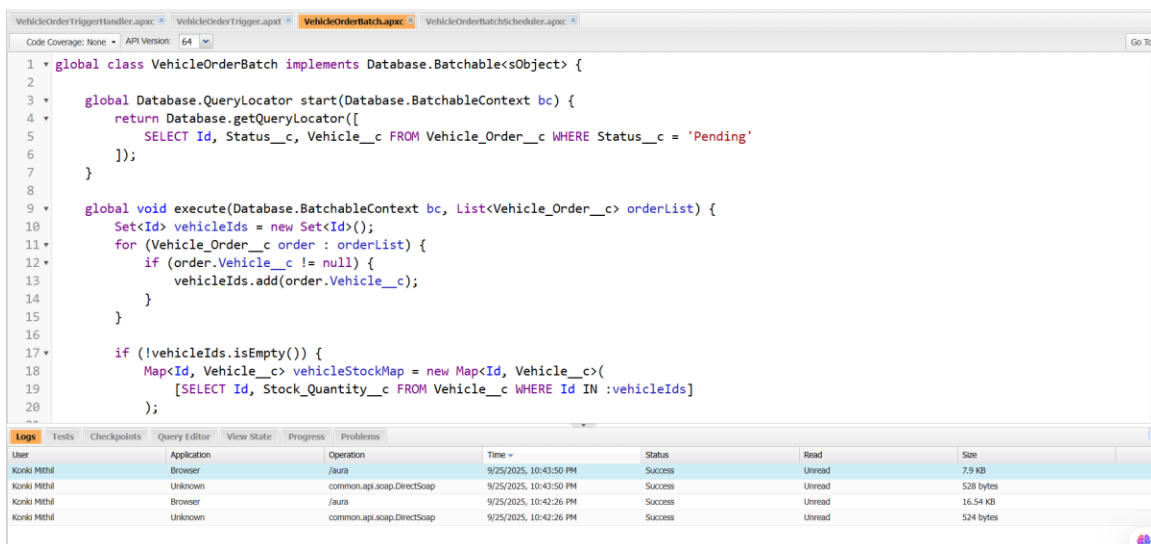


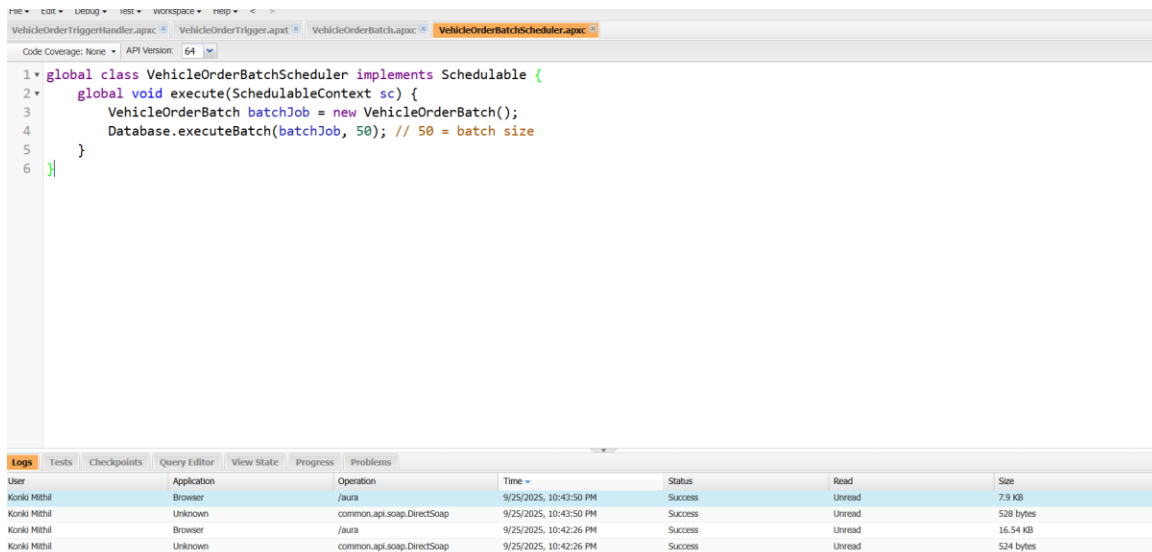
## 5.2. Asynchronous Apex: Vehicle Order Batch Class & Scheduler

I created a Batch Apex class and a Scheduler class to handle asynchronous processing of vehicle orders.

**VehicleOrderBatch Apex Class:** This class is designed to process Vehicle Order records in batches. The video describes its purpose as checking vehicle stock quantity and, if it's less than zero, setting the order status to "pending".

**VehicleOrderBatchScheduler Apex Class:** This class schedules the VehicleOrderBatch to run at specific intervals. The video demonstrated its creation and successful scheduling.

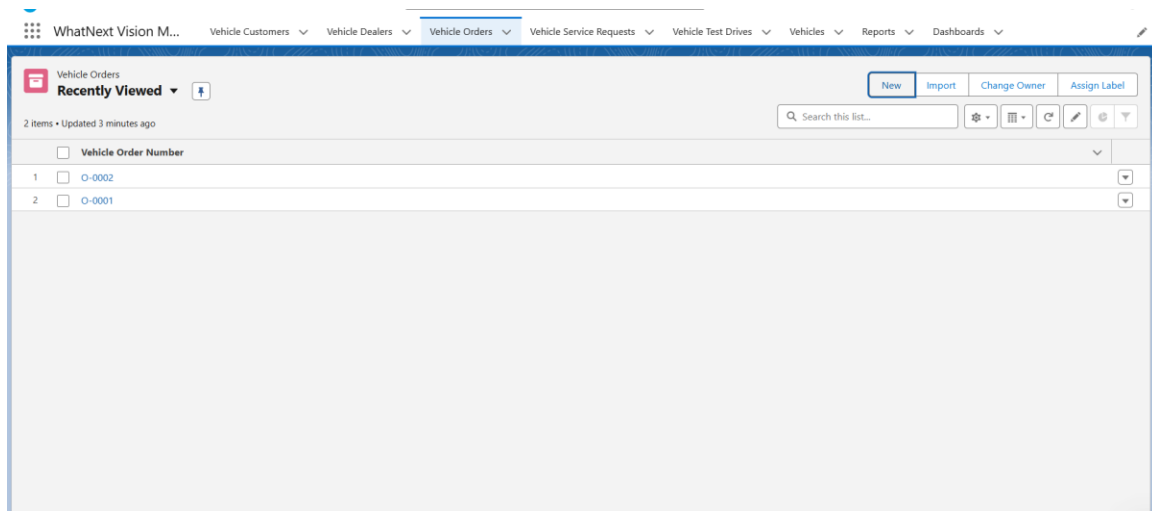




## Phase 6: User Interface Development

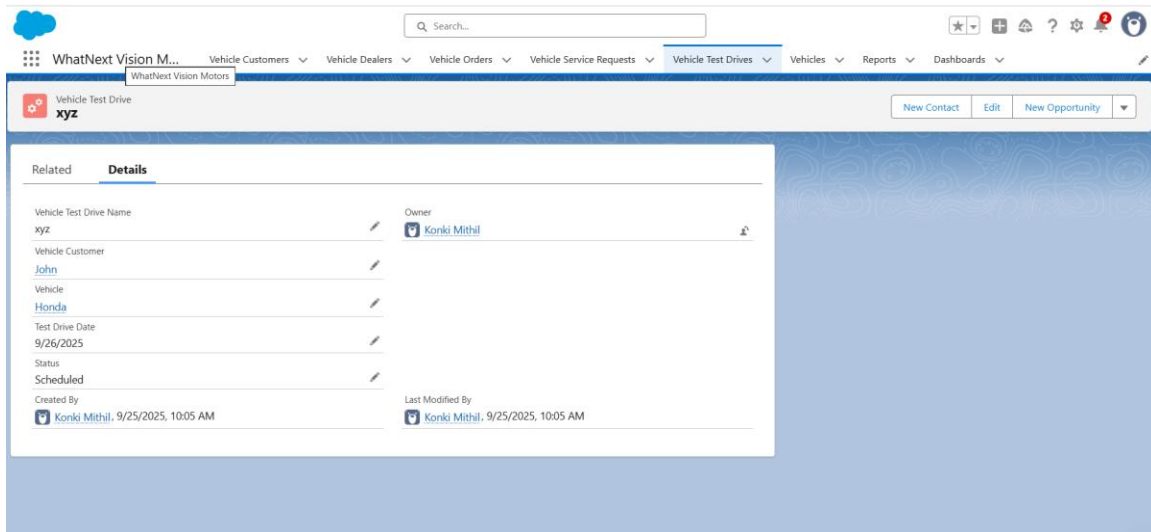
### 6.1. Application Creation: Lightning App Builder

I used the Lightning App Builder to create a custom application named "WhatNext Vision Motors". This app serves as the central hub for users to interact with all the custom objects and functionalities.



### 6.2. Navigation: Custom Object Tabs

I created custom tabs for all six custom objects (Vehicle, Vehicle Dealer, Vehicle Customer, Vehicle Order, Vehicle Test Drive, Vehicle Service Request). I then added these custom tabs, along with standard "Reports" and "Dashboards" tabs, to the "WhatNext Vision Motors" app's navigation bar. This ensures easy and intuitive navigation for users.



## Phase 7: Integration & External Access (Out of Scope)

This project focused on building robust internal functionalities within the Salesforce platform. Integration with external systems was not part of the initial project scope.

## Phase 8: Data Management & Deployment (Out of Scope)

All components for the "Vehicle Order Automation" project were developed and tested directly within a single Salesforce Developer Edition org. Data entry was performed manually for demonstration purposes. Formal data migration (e.g., using Data Loader) or deployment strategies (e.g., Change Sets, SFDX) were not covered in this phase of the project.

## Phase 9: Reporting, Dashboards & Security Review

### 9.1. Security Model Summary (Not covered in detail)

While the project was built within a Salesforce org that inherently has a security model, the video did not delve into specific security configurations like Object-Level Security, Field-Level Security, or Organization-Wide Defaults. The demonstration was conducted under a System Administrator profile.

### 9.2. Reporting & Dashboard Framework

I included the standard "Reports" and "Dashboards" tabs in the "WhatNext Vision Motors" application. This provides users with direct access to Salesforce's analytical capabilities, allowing for the creation of custom reports and dashboards on all the collected vehicle, customer, order, and test drive data in the future.

## Phase 10: Final Presentation & Demo Day

### 10.1. Project Demonstration & Key Outcomes

I successfully demonstrated the complete "WhatNext Vision Motors" project by showcasing its core functionalities:

Custom Objects & Data Entry: Demonstrated the creation of Vehicle Customer, Vehicle Dealer, and Vehicle records.

Auto-Assign Dealer Flow: Showed how a Vehicle Order automatically gets assigned to the correct dealer based on customer location.

Test Drive Reminder Flow: Demonstrated the automated email reminder being sent for a scheduled test drive.

Apex Order Processing:

Confirmed an order, showing the Stock Quantity on the Vehicle record being automatically reduced.

Attempted to create an order for an out-of-stock vehicle, demonstrating the Apex trigger's ability to prevent the order and display an error message.

Batch Apex: Showcased the successful execution of the VehicleOrderBatchScheduler.

## **10.Conclusion**

The " Vehicle Order Automation " project successfully implemented a robust and automated system for vehicle order processing and customer engagement on the Salesforce platform. By integrating custom objects, Flows, and Apex code, I addressed key business challenges related to dealer assignment, inventory management, and test drive reminders. This solution provides a strong foundation for WhatNext Vision Motors to streamline its operations, improve data accuracy, and enhance the overall customer experience in the competitive mobility sector.