

WhatsNext Vision Motors

Salesforce CRM Implementation

Phase 1

1. Project Overview

WhatsNext Vision Motors is implementing Salesforce CRM to improve the customer ordering experience and to enhance operational efficiency. Phase 1 focuses on building the core Salesforce foundation, managing vehicle stock, and automating key order-related processes.

2. Phase 1 Objectives

- Improve the vehicle ordering experience for customers
- Automatically suggest the nearest dealer based on customer location
- Prevent orders for out-of-stock vehicles
- Automate order status updates
- Reduce manual effort through automation

3. Salesforce CRM Implementation

Salesforce CRM is used to store and manage vehicle details, dealer information, customer data, orders, and test drive requests. This centralized system helps ensure accurate tracking and smooth operations.

4. Data Modelling

Objects Used:

- Standard Objects: Account (Dealer), Contact (Customer)
- Custom Objects: Vehicle, Vehicle Stock, Vehicle Order, Test Drive

Relationships:

- One Vehicle can have multiple Orders
- One Dealer can manage multiple Orders
- One Customer can place multiple Orders

5. Process Automation

- Prevent order creation if vehicle stock is zero
- Automatically assign the nearest dealer to an order
- Send automated email reminders for scheduled test drives

6. Apex and Triggers

Apex triggers are implemented to enforce business rules such as stock validation and dealer assignment. Trigger handler pattern is followed to ensure clean, modular, and maintainable code.

7. Batch and Scheduled Apex

- Batch Apex job periodically checks vehicle stock levels
- Automatically updates vehicle availability
- Updates bulk order status to Pending or Confirmed based on stock
- Scheduled Apex runs batch jobs at fixed intervals

8. Benefits of Phase 1

- Accurate stock availability
- Improved customer satisfaction
- Faster order processing
- Reduced administrative workload

9. What You Will Learn

- Data Modelling
- Fields and Relationships
- Lightning App Builder
- Record-Triggered Flows
- Apex and Apex Triggers
- Batch Apex
- Scheduled Apex