

# **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