SkillWallet Salesforce Project – Documentation

# 1. Project Title

WhatNext Vision Motors – Salesforce CRM Implementation

# 2. Project Overview

WhatNext Vision Motors is revolutionizing the automotive industry with its Salesforce-powered CRM. The objective is to improve customer satisfaction and internal efficiency by automating vehicle order management, stock validation, and dealer assignment.

# 3. Goals/Objectives

* - Prevent vehicle order creation if the vehicle is out of stock.
* - Automatically assign nearest dealers based on customer address.
* - Automate status updates for bulk orders using Batch Apex.
* - Send email notifications for test drives and stock updates.

# 4. Key Modules

|  |  |
| --- | --- |
| Module | Description |
| Vehicle Management | Manage vehicle data, stock, and availability |
| Order System | Order placement and validation based on stock |
| Dealer Assignment | Location-based auto-assignment of dealers |
| Automation | Flow-based and Apex-trigger automation |
| Batch Processing | Schedule-based status updates for bulk orders |

# 5. Salesforce Features Used

* - Custom Objects
* - Custom Fields and Relationships
* - Record-Triggered Flows
* - Apex Triggers
* - Batch Apex & Scheduled Jobs
* - Email Alerts
* - App Builder & Tabs

# 6. Technical Architecture

Data Flow:

1. 1. Customer fills vehicle order form.
2. 2. Trigger checks stock:
3. - If out of stock → Status: Pending
4. - If in stock → Status: Confirmed
5. 3. Nearest dealer auto-assigned using Geolocation logic.
6. 4. Batch job updates all statuses periodically.

# 7. Use Cases

|  |  |
| --- | --- |
| Use Case | Description |
| Order Creation | Customer places an order for a vehicle |
| Stock Check | Trigger ensures only in-stock vehicles can be ordered |
| Dealer Assignment | Based on customer's location |
| Batch Processing | Auto updates statuses of bulk orders |
| Email Reminder | Sends reminder for scheduled test drives |

# 8. Code Structure (Apex)

Triggers:  
- VehicleOrderTrigger – Handles before insert, after insert.  
- Trigger Handler used to follow best practices.  
  
Batch Class:  
- OrderStatusBatch – Runs periodically to update stock-based statuses.

# 9. Tools & Technologies

* - Salesforce Lightning Platform
* - Apex Programming
* - Lightning App Builder
* - Salesforce Flows
* - Batch Apex
* - Scheduled Apex

# 10. Screenshots

(Include in the screenshots folder, but reference here)  
- Vehicle Object  
- Order Form  
- Trigger Setup  
- Batch Job  
- Email Template

# 11. GitHub and Demo Links

GitHub Repository:GitHub: https://github.com/rashi2711/WhatNext\_Vision\_Motors\_RashiGarg

# 12. Learning Outcomes

* - CRM design and configuration
* - Data modeling in Salesforce
* - Flow automation
* - Apex and trigger development
* - Batch Apex job handling
* - Real-world application integration in Salesforce

# 13. Contact

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