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

Project Overview

WhatsNext Vision Motors, an innovative leader in the automotive industry, launched a Salesforce CRM project to enhance customer experience and streamline operations. The project focused on three major areas:

1. Automating dealer assignment based on customer location.

2. Validating stock availability to prevent out-of-stock orders.

3. Automating backend workflows such as order updates, scheduled status changes and email reminders.

This ensures that customers enjoy a seamless ordering process while the company reduces manual intervention and increases efficiency.

Objectives

- Improve the customer ordering process with automatic dealer assignment.
- Restrict order placement when vehicles are out of stock.
- Automate order status updates (Confirmed/Pending) using stock availability.
- Schedule automated email reminders for test drives and notifications.
- Increase transparency and reduce manual effort for employees.

Phase 1: Requirement Analysis & Planning

Business Requirements

- Customers should not place orders for unavailable vehicles.
- Dealer assignment should be automatic, based on customer location.
- Bulk orders should automatically update status based on stock.
- Automated notifications should keep customers informed.

Project Scope

- Salesforce CRM setup to manage vehicles, dealers, stock, and orders.
- Automation via Flows, Process Builder, and Apex triggers.
- Scheduled batch jobs for stock verification and order updates.

Data Model & Security Model

Objects Used

- **Vehicle**: Stores vehicle details and stock availability.
- **Dealer**: Stores dealer information and location.
- **Customer**: Stores customer details.
- **Order**: Captures customer vehicle orders.
- **Test Drive**: Tracks scheduled test drives.

Relationships

- Customer ↔ Orders
- Dealer ↔ Vehicles
- Order ↔ Vehicle

Security Model

- Profiles and Roles for Admin, Sales Reps, and Dealers.
- Field-level security for sensitive data.
- Sharing rules to ensure proper access.

Phase 2: Salesforce Development

Backend & Configurations

- **Custom Objects & Fields**: Created fields for stock, dealer location, and order status.
- **Validation Rules**: Prevent orders when stock = 0.
- **Automation Tools**:
  - Record-triggered Flows for nearest dealer assignment.
  - Workflow rules for test drive email reminders.
  - Process Builder for updating order statuses.

Apex Development

- **Triggers**:
  - Stock validation trigger.
  - Automatic dealer assignment trigger.
- **Trigger Handlers**: Implemented for modularity and maintainability.

Phase 3: Batch Jobs & Scheduled Processes

- **Batch Apex**: Periodically checks vehicle stock and updates availability.
- **Scheduled Apex**:
  - Updates order status to *Pending* if stock is unavailable.
  - Updates order status to *Confirmed* if stock is available.
- **Notifications**: Sends email alerts for order processing and stock replenishment.

Phase 4: Testing

- **Unit Tests** for Apex classes and triggers.
- **Scenarios Tested**:
  - Order creation with no stock → Blocked successfully.
  - Order creation with stock → Allowed, dealer auto-assigned.
  - Batch job execution → Correct order status updates.
  - Test drive reminders → Emails triggered as expected.

Phase 5: Deployment & Maintenance

- **Deployment**: Change Sets used to migrate from Sandbox to Production.
- **Maintenance Plan**:
    - Admin monitoring of automation flows and Apex jobs.
    - Debug logs for troubleshooting errors.
    - Alerts for failed jobs.

Conclusion

The Salesforce CRM implementation at WhatsNext Vision Motors successfully streamlined order management, dealer assignment, and stock validation. By automating critical workflows and ensuring accurate stock availability, the system improved customer experience, enhanced transparency, and reduced manual workload.