

Mike Dharen Lei F. Luansing

Polytechnic University of the Philippines – Sto. Tomas City

BSIT 4 – 1

WhatNext Vision Motors: Shaping the Future of Mobility with Innovation and Excellence– Salesforce CRM Project Documentation

Project Overview

The project development is focused on the system entitled “WhatsNext Vision Motors”, a car vehicle ordering system from Salesforce. This system is designed to provide a more efficient, convenience, faster and reliable for the customers. The system provides a key feature such as automation for dealer assignment that is based on their location. Also, the system provides a conflict handler, the error message shows whenever the customer orders a car that is in out-of-stock state or has 0 quantity ensuring a smooth and reduce confusion. This system provides a real time updates about the current stock as the stock is reduced whenever vehicle order is confirmed. Overall, WhatsNext Vision Motors streamline and innovates vehicle ordering process providing a smooth transaction for their intended uses. In addition, by making the process more efficient, customer satisfaction improves.

Objectives

The primary objective of this capstone or project is to innovate and improve vehicle ordering process making them easier and faster for everyone. The “WhatsNext Vision Motors” provides a beginner and user-friendly interface ensuring that everyone can use the system smoothly and without confusion. In addition, WhatsNext Vision Motors want to deliver a car vehicle ordering system with unique features, the features include conflict detection, real time updates on vehicle stock ensuring accurate data are provided and email reminder notification system. Moreover, the system aims to reduce manual works through automation of some process such as stock updates features. By achieving this objects, WhatsNext Vision Motors will deliver a seamless, efficient, and reliable vehicle ordering experience that benefits both customers and administrators.

Phase 1: Requirement Analysis & Planning

Understanding Business Requirements

The core business needs identified include:

- Automatically assign customers to their nearest dealer.
- Prevention in conflicts when ordering by providing real time update in stock.
- Maintain a structured system that allows to track vehicles, test drives, customers, orders, dealers, and service requests.
- Send automated email reminders for scheduled test drives.
- Maintaining accurate status in orders using scheduled and batch processing.

Defining Project Scope and Objectives

Scope and objective include:

- Creation of the custom object needed and defined the required field and relationships. The custom objects include vehicles, test drives, customers, orders, dealers, and service requests.
- Integration of Flows, Apex Triggers, Batch Apex, and Scheduled Apex for automation.
- Development of the lightning app using Lightning App Builder for navigating each section or modules.
- Validation rules and stock-check mechanism implementation to avoid conflicts.
- Testing and deployment.

Design Data Model and Security Model

Data models include:

- **Vehicle_c** – stores vehicle data such as vehicle name, model, stock quantity, price, dealer and status of the vehicle.
- **Vehicle_Dealer_c** – stores vehicle dealer data such as dealer name, location, phone and their email.
- **Vehicle_Customer_c** – stores the data of the customer such as name, email, phone, address and their preferred vehicle type.
- **Vehicle_Order_c** – stores order data such as the customer, vehicle, date of order, status and who is the assigned dealer.
- **Vehicle_Test_Drive_c** – this stores the data on test drive such as the vehicle test drive name, vehicle customer, vehicle, the date and status.
- **Vehicle_Service_Request_c** – stores the data of vehicle service request, it includes vehicle service request name, customer, vehicle, date of service, description and the status.

Security models include:

- **Profiles, Role Hierarchy, and Permission Sets** – It defines the user access levels and privileges based on responsibilities.
- **Object-Level and Record-Level Sharing Settings** – Control who can view or manage records across the organization
- **Field History Tracking** – Track changes to key fields such as changes in stock, status and email.

Stakeholder Mapping

- **System Administrator** – Oversees or manage the entire setup such as the objects, configurations, users and automation,
- **Sales Staff** – Uses the CRM to the creation of orders, track customer activities in the system and update status changes.
- **Dealers** – Receives the assigned order, manage the process and manage vehicle availability.
- **Customers** – The who one who experience faster, more accurate data and more efficient service.

Execution Roadmap

1. **Data Modeling** – Creation of the custom objects needed.
2. **Backend Integration** – Automation using triggers and batch jobs
3. **UI Development** – UI integration using lightning app and page layouts.
4. **Testing** – Testing of the unit, flow and processes.
5. **Deployment** – Deployment of the system
6. **Documentation and Maintenance** – Recording of the process on building the app.

Phase 2: Salesforce Development – Backend & Configurations

Environment Setup & DevOps Workflow

- Configuration of specific Salesforce Developer Org to safely design, create and test custom objects, field and relationship, flows, and its Apex components
- Using change sets to ensure that deployment between environments is controlled.
- Using developer console for creation, debugging, and testing of Apex classes and triggers.
- Streamlined DevOps workflows.

Customization of Objects, Field, Validation Rules

Custom Objects and Field and Relationship each object includes:

1. Vehicle__c

Fields:

- **Vehicle_Name__c** (Text)
- **Vehicle_Model__c** (Picklist: Sedan, SUV, EV, etc.)
- **Stock_Quantity__c** (Number)
- **Price__c** (Currency)
- **Dealer__c** (Lookup to Dealer__c)
- **Status__c** (Picklist: Available, Out of Stock, Discontinued)

2. Vehicle_Dealer__c

Fields:

- **Dealer_Name__c** (Text)
- **Dealer_Location__c** (Text)
- **Dealer_Code__c** (Auto Number)
- **Phone__c** (Phone)
- **Email__c** (Email)

3. Vehicle_Order__c

Fields:

- **Customer__c** (Lookup to Customer__c)
- **Vehicle__c** (Lookup to Vehicle__c)
- **Order_Date__c** (Date)
- **Status__c** (Picklist: Pending, Confirmed, Delivered, Canceled)

4. Vehicle_Customer__c

Fields:

- **Customer_Name__c** (Text)
- **Email__c** (Email)
- **Phone__c** (Phone)
- **Address__c** (Text)
- **Preferred_Vehicle_Type__c** (Picklist: Sedan, SUV, EV, etc.)

5. Vehicle_Test_Drive__c

Fields:

- **Customer__c** (Lookup to Customer__c)
- **Vehicle__c** (Lookup to Vehicle__c)
- **Test_Drive_Date__c** (Date)
- **Status__c** (Picklist: Scheduled, Completed, Canceled)
-

6. Vehicle_Service_Request__c

- **Customer__c** (Lookup to Customer__c)
- **Vehicle__c** (Lookup to Vehicle__c)
- **Service_Date__c** (Date)
- **Issue_Description__c** (Text)
- **Status__c** (Picklist: Requested, In Progress, Completed)

Screenshots:

The screenshot shows the Salesforce Setup interface for the 'Vehicle' object. The 'Fields & Relationships' tab is selected, displaying a list of 9 fields. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, etc. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main content area has a search bar and buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'.

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)		✓ ▼

Vehicle Dealer

Details	Fields & Relationships 8 Items, Sorted by Field Label				
Fields & Relationships	<div>Quick Find</div> <div>NewDeleted FieldsField DependenciesSet History Tracking</div>				
Page Layouts	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Lightning Record Pages	Created By	CreatedById	Lookup(User)		
Buttons, Links, and Actions	Dealer Code	Dealer_Code__c	Auto Number		
Compact Layouts	Dealer Location	Dealer_Location__c	Text(50)		
Field Sets	Dealer Name	Name	Text(80)		
Object Limits	Email	Email__c	Email		
Record Types	Last Modified By	LastModifiedById	Lookup(User)		
Related Lookup Filters	Owner	OwnerId	Lookup(User:Group)		
Search Layouts	Phone	Phone__c	Phone		
List View Button Layout					
Restriction Rules					
Scoping Rules					
Object Access					
Triggers					
Flow Triggers					
Validation Rules					
Conditional Field Formatting					

Vehicle Order

Details	Fields & Relationships 9 Items, Sorted by Field Label				
Fields & Relationships	<div>Quick Find</div> <div>NewDeleted FieldsField DependenciesSet History Tracking</div>				
Page Layouts	Field Label	Field Name	Data Type	Controlling Field	Indexed
Lightning Record Pages	Assigned Dealer	Assigned_Dealer__c	Lookup(Vehicle Dealer)		
Buttons, Links, and Actions	Created By	CreatedById	Lookup(User)		
Compact Layouts	Last Modified By	LastModifiedById	Lookup(User)		
Field Sets	Order date	Order_date__c	Date		
Object Limits	Owner	OwnerId	Lookup(User:Group)		
Record Types	Status	Status__c	Picklist		
Related Lookup Filters	Vehicle	Vehicle__c	Lookup(Vehicle)		
Search Layouts	Vehicle Customer	Vehicle_Customer__c	Lookup(Vehicle Customer)		
List View Button Layout	Vehicle Order Number	Name	Auto Number		
Restriction Rules					
Scoping Rules					
Object Access					
Triggers					
Flow Triggers					
Validation Rules					
Conditional Field Formatting					

SETUP > OBJECT MANAGER

Vehicle Test Drive

- Details
- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers
- Flow Triggers
- Validation Rules
- Conditional Field Formatting

Fields & Relationships

8 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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)		✓	
Status	Status__c	Picklist			
Test Drive Date	Test_Drive_Date__c	Date			
Vehicle	Vehicle__c	Lookup(Vehicle)		✓	
Vehicle Customer	Vehicle_Customer__c	Lookup(Vehicle Customer)		✓	
Vehicle Test Drive Name	Name	Text(80)		✓	

SETUP > OBJECT MANAGER

Vehicle Customer

- Details
- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers
- Flow Triggers
- Validation Rules
- Conditional Field Formatting

Fields & Relationships

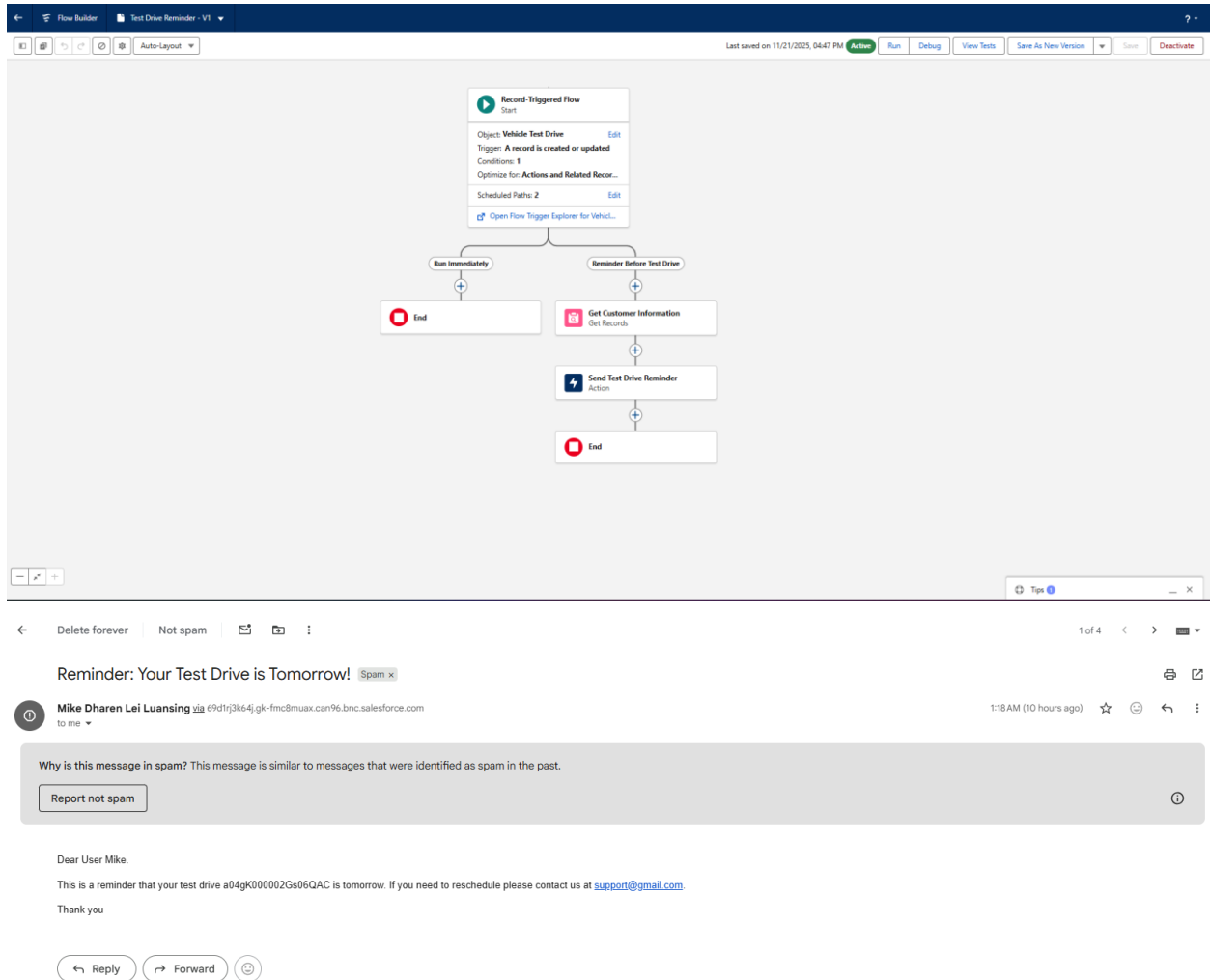
8 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Field Label	Field Name	Data Type	Controlling Field	Indexed	
Address	Address__c	Text(80)			
Created By	CreatedById	Lookup(User)			
Email	Email__c	Email			
Last Modified By	LastModifiedById	Lookup(User)			
Owner	OwnerId	Lookup(User,Group)		✓	
Phone	Phone__c	Phone			
Preferred Vehicle Type	Preferred_Vehicle_Type__c	Picklist			
Vehicle Customer Name	Name	Text(80)		✓	

2. Test Drive Reminder

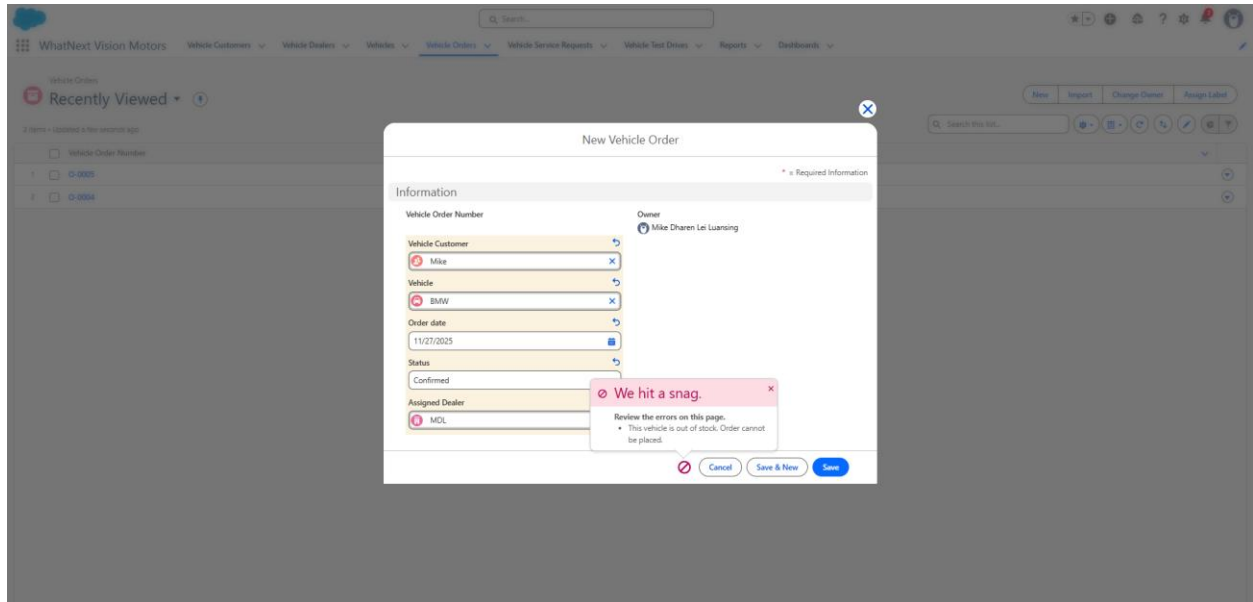
This flow is designed to enhance customer satisfaction and customers engagements. It also prevented missed appointments by notifying or reminding the customer about their test drive. The flow triggered the day before the scheduled test drive, the notification or reminder is sent via email.



Apex Classes and Triggers

Apex Trigger Handler:

- Prevent placing order when vehicle is out of stock.
- Reducing vehicle stock when one order is completed.



Asynchronous Apex

Batch Apex

- Batch apex checks all the pending order, provide real time updates in vehicle stocks and automatically update stocks whenever order is confirmed.

Scheduled Apex

- Schedules a batch process to run daily at a specified time, it ensures automated updates, data processing, or status synchronization without manual intervention.

Source code:

Vehicle Order Trigger handler

```
1 public class VehicleOrderTriggerHandler {
2
3     public static void handleTrigger(List<Vehicle_Order__c> newOrders, Map<Id, Vehicle_Order__c> oldOrders, Boolean isBefore, Boolean isAfter, Boolean isInsert, Boolean isUpdate) {
4         if (isBefore && (isInsert || isUpdate)) {
5             preventOrderIfOutOfStock(newOrders);
6         }
7
8         if (isAfter && (isInsert || isUpdate)) {
9             updateStockOnOrderPlacement(newOrders);
10        }
11    }
12
13    // ✗ Prevent placing an order if stock is zero
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.');
```

Vehicle Order Trigger

```
VehicleOrderTriggerHandler.apex VehicleOrderTrigger.apex VehicleOrderBatch.apex VehicleOrderBatchScheduler.apex
Code Coverage: None API Version: 65
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 }
```

Vehicle Order Batch

```
VehicleOrderTriggerHandler.apxc | VehicleOrderTrigger.apxt | VehicleOrderBatch.apxc | VehicleOrderBatchScheduler.apxc
Code Coverage: None | API Version: 65
1 global class VehicleOrderBatch implements Database.Batchable<Object> {
2
3     global Database.QueryLocator start(Database.BatchableContext bc) {
4         return Database.getQueryLocator([
5             SELECT Id, Status__c, Vehicle__c FROM Vehicle_Order__c WHERE Status__c = 'Pending'
6         ]);
7     }
8
9     global void execute(Database.BatchableContext bc, List<Vehicle_Order__c> orderList) {
10         Set<Id> vehicleIds = new Set<Id>();
11         for (Vehicle_Order__c order : orderList) {
12             if (order.Vehicle__c != null) {
13                 vehicleIds.add(order.Vehicle__c);
14             }
15         }
16
17         if (!vehicleIds.isEmpty()) {
18             Map<Id, Vehicle__c> vehicleStockMap = new Map<Id, Vehicle__c>([
19                 SELECT Id, Stock_Quantity__c FROM Vehicle__c WHERE Id IN :vehicleIds
20             ]);
21
22             List<Vehicle_Order__c> ordersToUpdate = new List<Vehicle_Order__c>();
23             List<Vehicle__c> vehiclesToUpdate = new List<Vehicle__c>();
24
25             for (Vehicle_Order__c order : orderList) {
26                 Vehicle__c vehicle = vehicleStockMap.get(order.Vehicle__c);
27                 if (vehicle != null && vehicle.Stock_Quantity__c > 0) {
28                     order.Status__c = 'Confirmed';
29                     vehicle.Stock_Quantity__c -= 1;
30                     ordersToUpdate.add(order);
31                     vehiclesToUpdate.add(vehicle);
32                 }
33             }
34
35             if (!ordersToUpdate.isEmpty()) update ordersToUpdate;
36             if (!vehiclesToUpdate.isEmpty()) update vehiclesToUpdate;
37         }
38     }
39
40     global void finish(Database.BatchableContext bc) {
41         System.debug('Vehicle order batch job completed.');
```

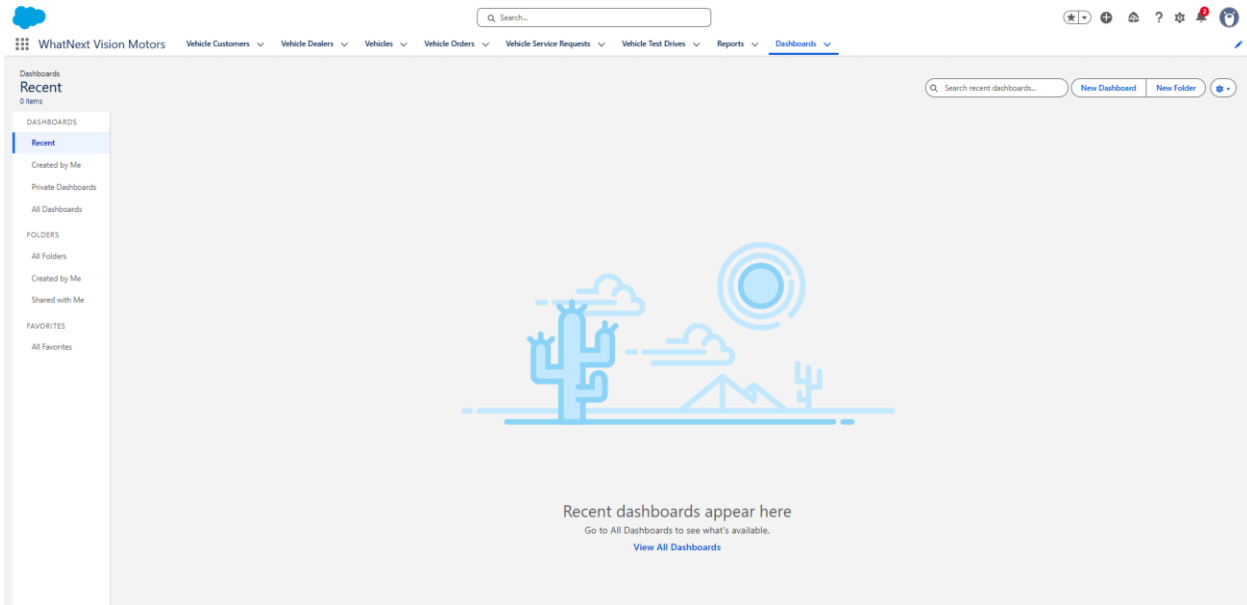
Vehicle Order Batch Scheduler

```
VehicleOrderTriggerHandler.apxc | VehicleOrderTrigger.apxt | VehicleOrderBatch.apxc | VehicleOrderBatchScheduler.apxc
Code Coverage: None | API Version: 65
1 global class VehicleOrderBatchScheduler implements Schedulable {
2     global void execute(SchedulableContext sc) {
3         VehicleOrderBatch batchJob = new VehicleOrderBatch();
4         Database.executeBatch(batchJob, 50); // 50 = batch size
5     }
6 }
```

Phase 3: UI/UX Development & Customization

Lightning App Setup

Creation of the “WhatsNext Vision Motors” App for better user interface and user experience, the user interface includes a navigation area for easy navigation within the system. The navigation includes specific object that are connected in the application, it includes Vehicles, Vehicle Dealers, Vehicle Customers, Vehicle Orders, Vehicle Test Drives, Vehicle Service Request, Reports, Dashboards.



Page Layout and Dynamic Forms

- Customized and customizable layout of the UI or objects for better user experience and ease of use. In addition, dynamic displays are based on the user role allowing and ensuring only relevant information is accessible based on their role.
- Some information or data is only visible when particular condition are met such as user role and permission.

User Management

- The system gave specific roles for the user such as the System Administrator. This role gives specific access within the system.

Reports and Dashboards

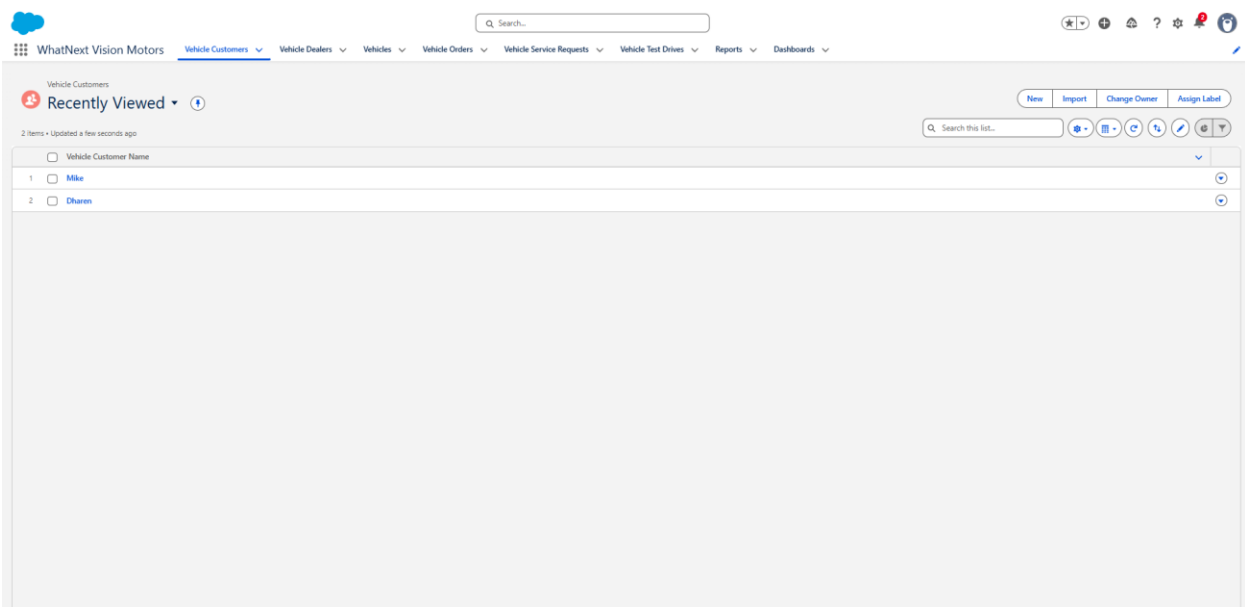
- Shows the vehicle stock report such as current available stock.
- Dealer assignment report shows which dealer is assigned to the specific order.
- Shows and track successful or completed test drives.

Lightning Pages


- Custom pages are made for Vehicle, Dealer, and Customer records.
- Added quick actions for more efficient and convenience, also related list is added.

Screenshots








Vehicle Customers



Vehicle Dealers





WhatNext Vision Motors









Vehicle Customers ▾ Vehicle Dealers ▾ Vehicles ▾ Vehicle Orders ▾ Vehicle Service Requests ▾ Vehicle Test Drives ▾ Reports ▾ Dashboards ▾


Vehicle Dealers

Recently Viewed  


1 item • Updated a few seconds ago

New Import Change Owner Assign Label








     

	<input type="checkbox"/> Dealer Name	
1	<input type="checkbox"/> MDL	

Vehicles





WhatNext Vision Motors









Vehicle Customers ▾ Vehicle Dealers ▾ Vehicles ▾ Vehicle Orders ▾ Vehicle Service Requests ▾ Vehicle Test Drives ▾ Reports ▾ Dashboards ▾




Vehicles

Recently Viewed  

3 items • Updated a few seconds ago

New Import Change Owner Assign Label


     

	<input type="checkbox"/> Vehicle Name	
1	<input type="checkbox"/> BMW	
2	<input type="checkbox"/> Suzuki	
3	<input type="checkbox"/> Honda	

<https://carfam-d06877ad8-dev-ed.lightning.force.com/lightning/setup/vehicle-dealer-c/home>

Vehicle

Orders



WhatNext Vision Motors

Vehicle Customers

Vehicle Dealers

Vehicles

Vehicle Orders

Vehicle Service Requests

Vehicle Test Drives

Reports

Dashboards

Search...

Star

Share

Help

Settings

Logout

Vehicle Orders

Recently Viewed

2 Items • Updated a few seconds ago

New

Import

Change Owner

Assign Label

Search this list...

Filter

Sort

Refresh

Print


Export

	Vehicle Order Number	
1	O-0005	
2	O-0004	

Vehicle

Service

Requests



WhatNext Vision Motors

Vehicle Customers

Vehicle Dealers

Vehicles

Vehicle Orders

Vehicle Service Requests

Vehicle Test Drives

Reports

Dashboards

Search...

Star

Share

Help

Settings

Logout

Vehicle Service Requests

Recently Viewed

1 Item • Updated a few seconds ago

New

Import

Change Owner

Assign Label

Search this list...

Filter

Sort


Refresh

Print







Export

	Vehicle Service Request Name	
1	Mike	

Vehicle Test Drives



WhatNext Vision Motors









Vehicle Customers ▾ Vehicle Dealers ▾ Vehicles ▾ Vehicle Orders ▾ Vehicle Service Requests ▾ Vehicle Test Drives ▾ Reports ▾ Dashboards ▾

Vehicle Test Drives


Recently Viewed ▾ ⓘ

1 item • Updated a few seconds ago









	Vehicle Test Drive Name
1	<input type="checkbox"/> Mike

Reports



WhatNext Vision Motors



Vehicle Customers ▾ Vehicle Dealers ▾ Vehicles ▾ Vehicle Orders ▾ Vehicle Service Requests ▾ Vehicle Test Drives ▾ Reports ▾ Dashboards ▾

Reports

Recent

0 items

REPORTS

Recent

Created by Me

Private Reports

Public Reports

All Reports

FOLDERS


All Folders


Created by Me

Shared with Me

FAVORITES

All Favorites

[New Report](#) [New Folder](#) 

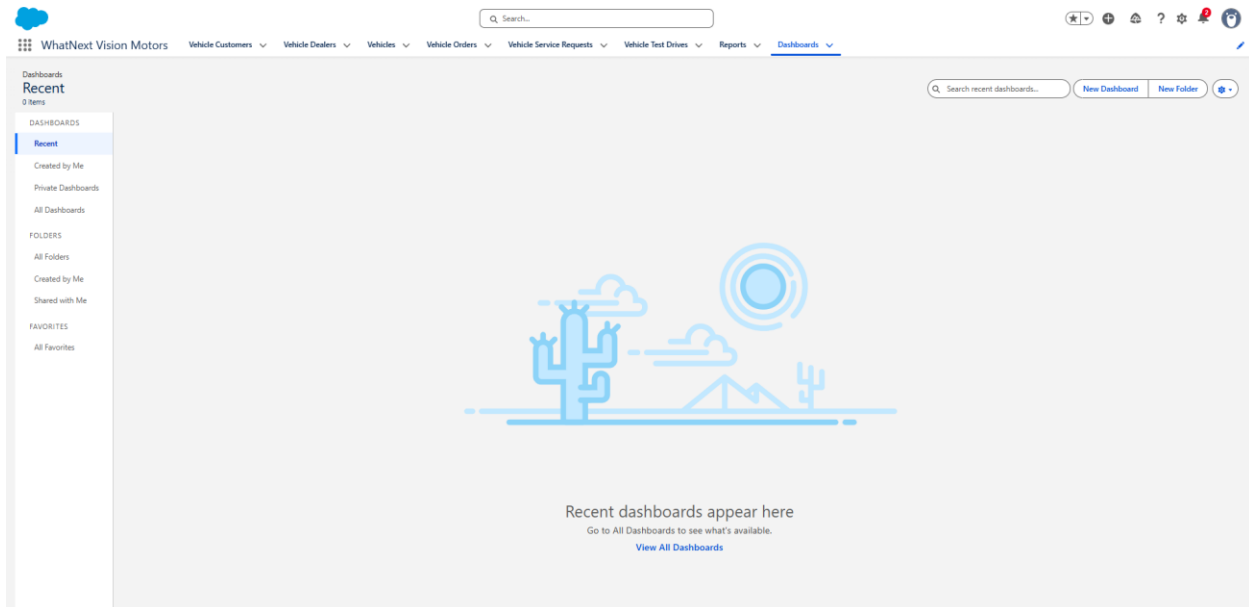


Recent reports appear here

Go to All Reports to see what's available.

[View All Reports](#)

Dashboards



Phase 4: Data Migration, Testing & Security

Data Loading Process

- A few sample data are added manually in the system for testing purposes, the data includes customer, dealer, and vehicle records. If you wish to import a lot amount of data, salesforce provide helpful tools such as the Data Import Wizard.

Security Configurations

- By setting up security, user's only access only their perspective information, the role hierarchy lets the admin or the manager track their records, set or add new permission and share rules that are needed. Tracking history includes the status and stock quantity.

Testing Process

- Testing process is made to ensure that all functionalities work properly, also testing the flow automation is done to ensure that it works as is supposed to be working. Apex testing is also conducted, the results showed that whenever a customer is trying to order a vehicle that is out-of-stock shows an error and when the order is completed or confirmed the stock is automatically deducted and update.


Screenshots:

Vehicle Customer

The screenshot displays a CRM interface for 'WhatNext Vision Motors'. The top navigation bar includes a search bar and several menu items: 'Vehicle Customers', 'Vehicle Dealers', 'Vehicles', 'Vehicle Orders', 'Vehicle Service Requests', 'Vehicle Test Drives', 'Reports', and 'Dashboards'. The main header shows the customer's name 'Mike' and a 'Vehicle Customer' label. On the right, there are buttons for 'New Contact', 'Edit', and 'New Opportunity'. The 'Details' tab is active, showing a form with the following fields:

Field	Value	Action
Vehicle Customer Name	Mike	Edit
Email	dharanle21@gmail.com	Edit
Phone	(123) 456-7890	Edit
Address	Hyderabad	Edit
Preferred Vehicle Type	Sedan	Edit
Created By	Mike Dharan Lei Luensing, 11/20/2025, 9:44 PM	
Last Modified By	Mike Dharan Lei Luensing, 11/26/2025, 8:24 AM	

Vehicle Dealers



WhatNext Vision Motors

Vehicle Customers

Vehicle Dealers

Vehicles

Vehicle Orders

Vehicle Service Requests

Vehicle Test Drives

Reports

Dashboards

Q Search...

★

🔍

🔒

?

⚙️

🔔

👤

Vehicle Dealer

MDL

New Contact

Edit

New Opportunity

Related

Details

Dealer Name

MDL

✎

Owner

👤

Mike Dharan Lei Luansing

🔒

Dealer Location

Las Vegas

✎

Dealer Code

DC-0003

✎

Phone

(123) 456-7890

✎

Email

dlv@gmail.com

✎

Created By

👤

Mike Dharan Lei Luansing

11/26/2025, 9:11 AM


Last Modified By

👤

Mike Dharan Lei Luansing

11/26/2025, 9:11 AM

Vehicles



WhatNext Vision Motors

Vehicle Customers

Vehicle Dealers

Vehicles

Vehicle Orders

Vehicle Service Requests

Vehicle Test Drives

Reports

Dashboards

Q Search...

★

🔍

🔒

?

⚙️

🔔

👤

Vehicle

BMW

New Contact

Edit

New Opportunity

Related

Details

Vehicle Name

BMW

✎

Owner

👤

Mike Dharan Lei Luansing

🔒

Vehicle Model

SUV

✎

Stock Quantity

0

✎

Price

\$120,000

✎

Vehicle Dealer

MDL

✎

Status

Out-of-stock

✎

Created By

👤

Mike Dharan Lei Luansing

11/26/2025, 7:28 PM

Last Modified By

👤

Mike Dharan Lei Luansing

11/26/2025, 7:28 PM

Vehicle Order

The screenshot shows the 'Vehicle Order' details page for order O-0005. The page is part of the 'WhatNext Vision Motors' application, with a navigation bar at the top containing links for 'Vehicle Customers', 'Vehicle Dealers', 'Vehicles', 'Vehicle Orders' (selected), 'Vehicle Service Requests', 'Vehicle Test Drives', 'Reports', and 'Dashboards'. A search bar is located in the top right. The main content area is titled 'Vehicle Order O-0005' and includes buttons for 'New Contact', 'Edit', and 'New Opportunity'. Below the title, there are two tabs: 'Related' and 'Details'. The 'Details' tab is active, showing a list of fields with their values and edit icons. The fields are: 'Vehicle Order Number' (O-0005), 'Owner' (Mike Dharren Lei Luansing), 'Vehicle Customer' (Mike), 'Vehicle' (Suzuki), 'Order date' (11/26/2025), 'Status' (Confirmed), 'Assigned Dealer' (MDL), 'Created By' (Mike Dharren Lei Luansing, 11/26/2025, 9:14 AM), and 'Last Modified By' (Mike Dharren Lei Luansing, 11/26/2025, 9:14 AM).


Field	Value	Edit
Vehicle Order Number	O-0005	
Owner	Mike Dharren Lei Luansing	
Vehicle Customer	Mike	
Vehicle	Suzuki	
Order date	11/26/2025	
Status	Confirmed	
Assigned Dealer	MDL	
Created By	Mike Dharren Lei Luansing, 11/26/2025, 9:14 AM	
Last Modified By	Mike Dharren Lei Luansing, 11/26/2025, 9:14 AM	

Out-of- Stock Vehicle Order

The screenshot shows the 'New Vehicle Order' form in the WhatNext Vision Motors system. The form is titled 'New Vehicle Order' and includes a close button (X). Below the title, there is a section for 'Information' with a note '* = Required Information'. The fields are: 'Vehicle Order Number' (empty), 'Owner' (Mike Dharren Lei Luansing), 'Vehicle Customer' (Mike), 'Vehicle' (BMW), 'Order date' (11/27/2025), 'Status' (Confirmed), and 'Assigned Dealer' (MDL). A red error message box is displayed over the form, stating 'We hit a snag. Review the errors on this page. This vehicle is out of stock. Order cannot be placed.' The form has buttons for 'Cancel', 'Save & New', and 'Save'. In the background, a 'Recently Viewed' list is visible, showing two vehicle orders: O-0005 and O-0004.

Field	Value
Vehicle Order Number	
Owner	Mike Dharren Lei Luansing
Vehicle Customer	Mike
Vehicle	BMW
Order date	11/27/2025
Status	Confirmed
Assigned Dealer	MDL

Vehicle Service Request



WhatNext Vision Motors

Vehicle Customers

Vehicle Dealers

Vehicles

Vehicle Orders

Vehicle Service Requests

Vehicle Test Drives

Reports

Dashboards

Q Search...

★

🔍

🔒

?

⚙️

🔔

👤

Vehicle Service Request

Mike

New ContactEditNew Opportunity

RelatedDetails

Vehicle Service Request Name

Mike

Vehicle Customer

Mike

Vehicle

Suzuki

Service Date

11/27/2025

Issue Description

test

Status

Completed

Created By

Mike Charen Lei Luansing, 11/26/2025, 6:10 PM


Owner

Mike Charen Lei Luansing

Last Modified By

Mike Charen Lei Luansing, 11/26/2025, 6:10 PM

Vehicle Test Drives



WhatNext Vision Motors

Vehicle Customers

Vehicle Dealers

Vehicles

Vehicle Orders

Vehicle Service Requests

Vehicle Test Drives

Reports

Dashboards

Q Search...

★

🔍

🔒

?

⚙️

🔔

👤

Vehicle Test Drive

Mike

New ContactEditNew Opportunity

RelatedDetails

Vehicle Test Drive Name

Mike

Vehicle Customer

Mike

Vehicle

Honda

Test Drive Date

11/27/2025

Status

Scheduled

Created By

Mike Charen Lei Luansing, 11/26/2025, 9:18 AM

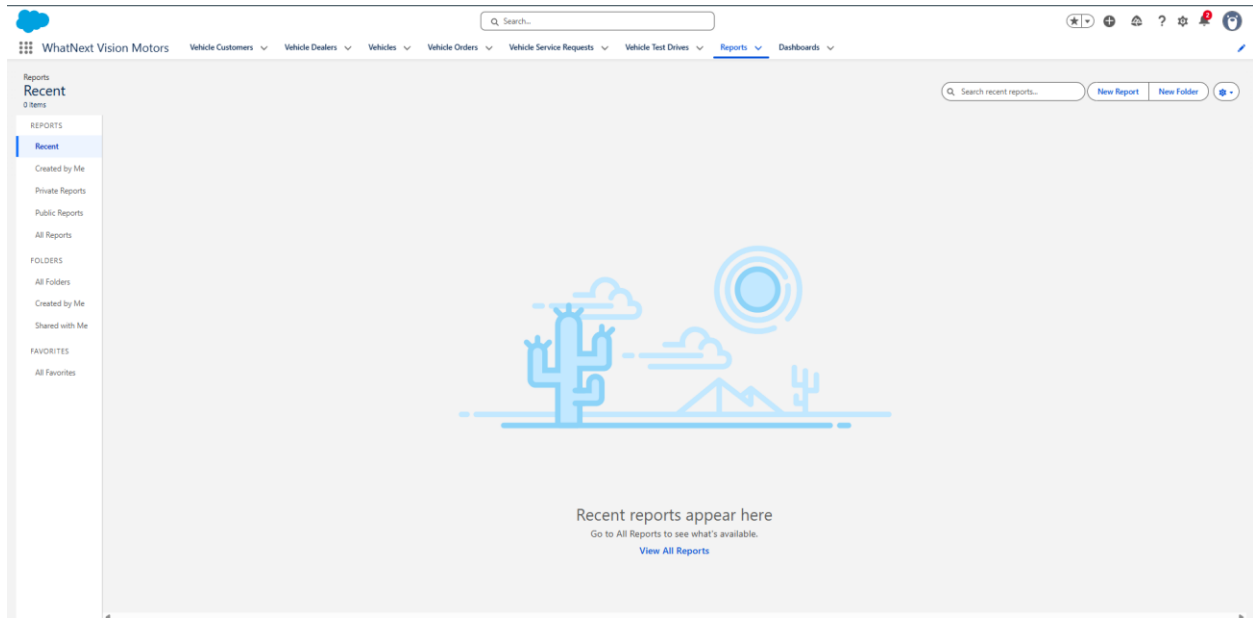
Owner

Mike Charen Lei Luansing

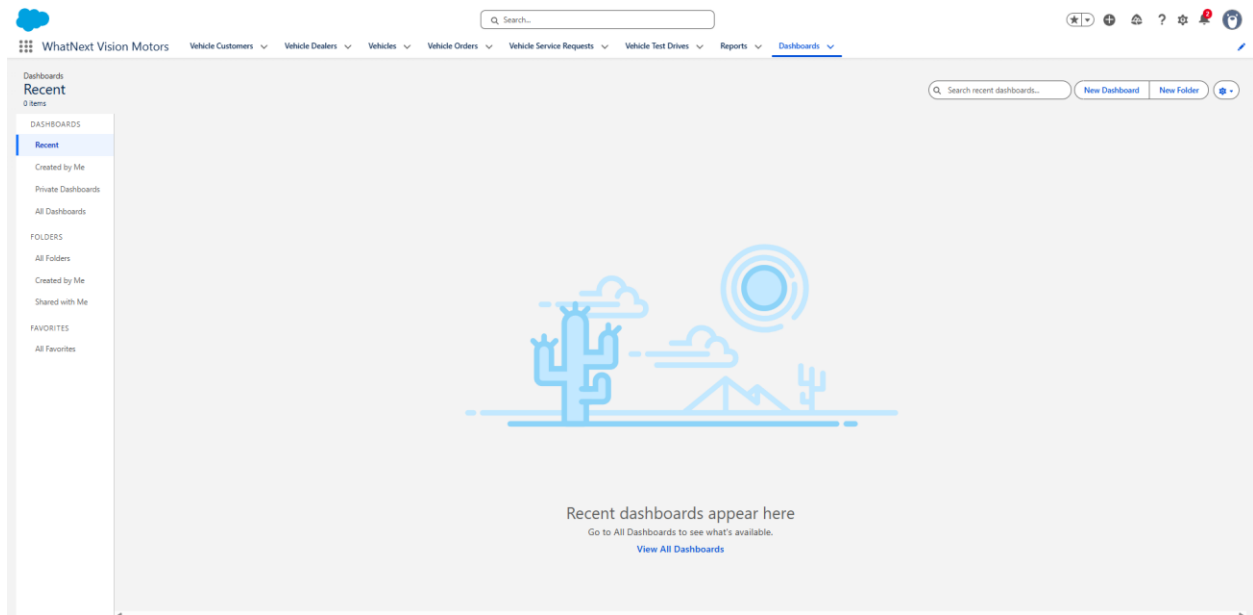
Last Modified By

Mike Charen Lei Luansing, 11/26/2025, 9:18 AM

Reports



Dashboards



Phase 5: Deployment, Documentation & Maintenance

Deployment Strategy

Change sets are used to deploy all the components needed

- **Custom objects** – Deployed all the custom objects that are needed ensuring all fields and relationship is available.
- **Flow** – Deployed automation flows such as dealer assignment and test drive reminder ensuring smooth processes.
- **Apex Classes & Triggers** - Deployed Apex logic and triggers to automate backend processes such as order validation and inventory updates
- **Page Layouts** – Deployed page layouts.
- **Reports and Dashboards** – Deployed reports and dashboards to provide real time data and updates to stakeholders.

Maintenance Plan

- **Monitor Schedule Jobs** – Administrator must regularly check and review the system to ensure they run correctly and on time
- **Inventory Check** – Stocks must always be check and reviewed weekly, ensuring accurate data and prevent conflicts when ordering.
- **Automation Update** – Automation process must be update regularly as soon as new process is added in the system.
- **Security Audits** – Regularly check security and permission sets to ensure all permission is given properly

Troubleshooting Approach

- **Uses logs for diagnosis** - Check logs to find errors in flows, triggers, or batch processes.
- **Track data changes** – Use tracked data for investigation to the issues encountered and sudden changes in the system.
- **Collaboration and Partnership** – Collaboration and partnership with other developers to resolve or address the issue being encountered especially when the problems are difficult to handle by yourself.

Conclusion

WhatsNext Vision Motors is developed by Salesforce CRM to make the vehicle ordering system more efficient, convenience, and faster. The WhatsNext Vision Motors provide a key feature from choosing the vehicle your desired, ordering it, Automating the assignment of the correct dealer, test driving and until the transaction is completed. Also Added a special feature such as the email reminder about test drive scheduled to avoid miss scheduled. The system ensures smooth operations for both customers and administrators while reducing manual work. With the potential to integrate new technologies like AI, this system could set the next trend in automotive CRM innovation. Overall, WhatsNext Vision Motors provide a modern and customer and beginner friendly vehicle ordering process experience and meets the demands of today's fast-paced market.

Future Enhancements

- **Artificial Intelligence Integration** - Provide personalized vehicle recommendations and predictive analytics.
- **Mobile App support** – Allow the customers to order vehicles using their mobile phones anytime and anywhere
- **Advance Reporting & Analytics that is AI Driven** - Deliver AI-driven insights for better business decision-making.