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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 Object Manager interface for the 'Vehicle' object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main area displays the 'Fields & Relationships' section for the 'Vehicle' object. On the left, a sidebar lists various configuration options: Details, 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, and Conditional Field Formatting. The main content area shows a table titled 'Fields & Relationships' with the following data:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	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)		✓

At the bottom right of the table, there are buttons for 'Quick Find', 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'.

Fields & Relationships				
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Dealer Code	Dealer_Code__c	Auto Number		
Dealer Location	Dealer_Location__c	Text(60)		
Dealer Name	Name	Text(80)		✓
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		

Fields & Relationships				
FIELD Label	FIELD NAME	DATA TYPE	Controlling Field	Indexed
Assigned Dealer	Assigned_Dealer__c	Lookup(Vehicle Dealer)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Order date	Order_date__c	Date		
Owner	OwnerId	Lookup(User,Group)		✓
Status	Status__c	Picklist		
Vehicle	Vehicle__c	Lookup(Vehicle)		
Vehicle Customer	Vehicle_Customer__c	Lookup(Vehicle Customer)		
Vehicle Order Number	Name	Auto Number		✓

Setup Home Object Manager

Vehicle Test Drive

Fields & Relationships

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 Home Object Manager

Vehicle Customer

Fields & Relationships

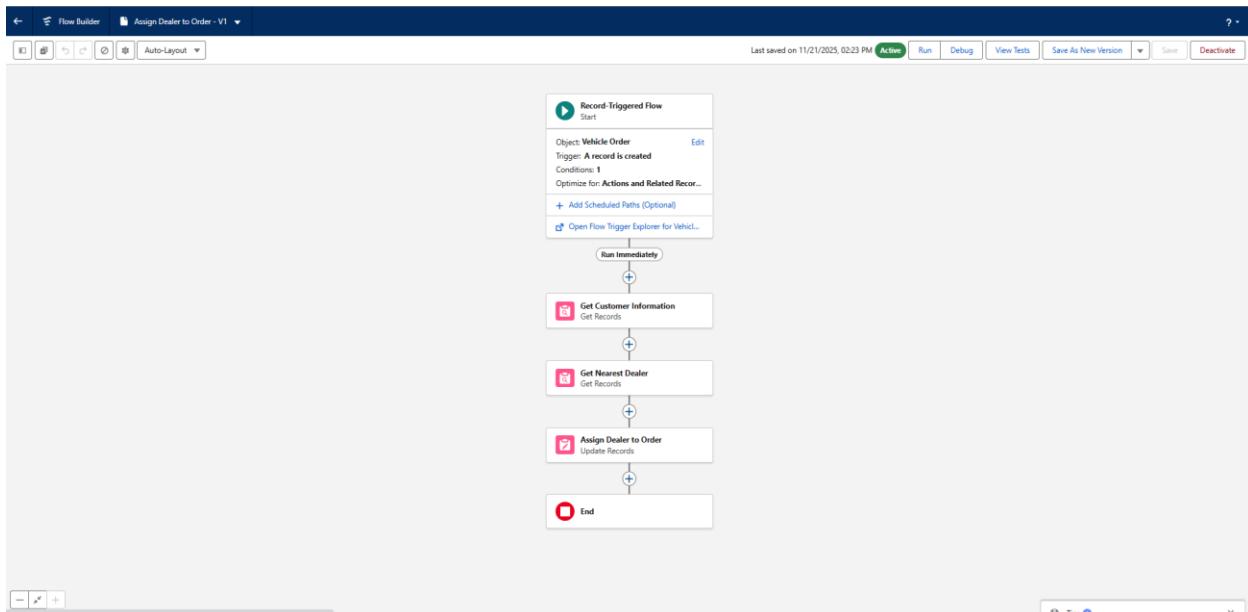
Field Label	Field Name	Data Type	Controlling Field	Indexed
Address	Address_c	Text(60)		
Created By	CreatedById	Lookup(User)		
Email	Email_c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
Phone	Phone_c	Phone		
Preferred Vehicle Type	Preferred_Vehicle_Type_c	Picklist		
Vehicle Customer Name	Name	Text(80)		

The screenshot shows the Salesforce Object Manager interface for the 'Vehicle Service Request' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, and Record Types. The main content area is titled 'Fields & Relationships' and displays a table of fields. The table columns include Field Label, Field Name, Data Type, Controlling Field, and Indexed. Fields listed include Created By, Issue Description, Last Modified By, Owner, Service Date, Status, Vehicle, Vehicle Customer, and Vehicle Service Request Name.

Automation Flows

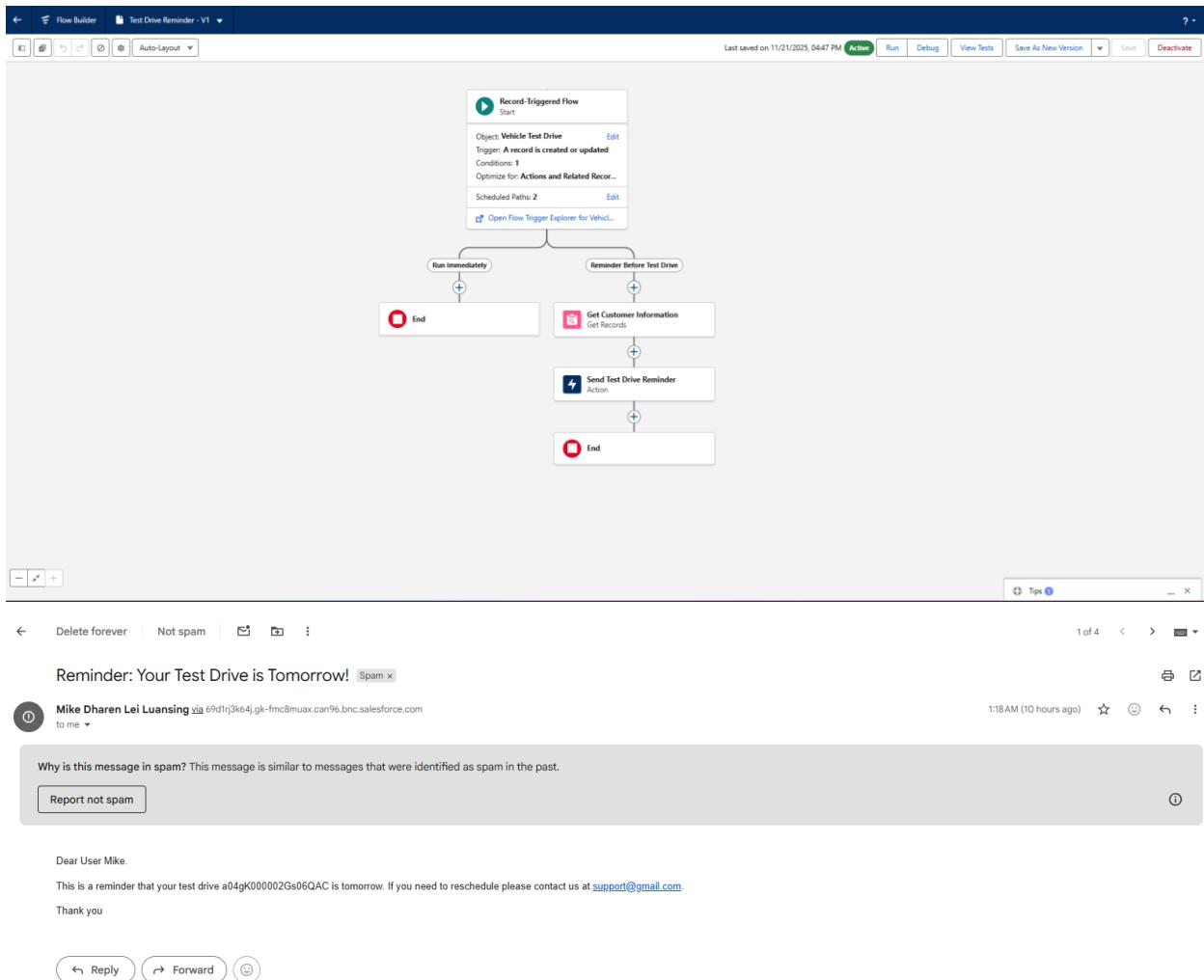
1. Assign Dealer to Order Flow

Auto assign dealer to order is flow used to automate to efficiently improve such process in the system and conveniency. This automation ensures that every new Vehicle Order is immediately linked to the correct dealer based on the customer's information, with no manual work required.



2. Test Drive Reminder

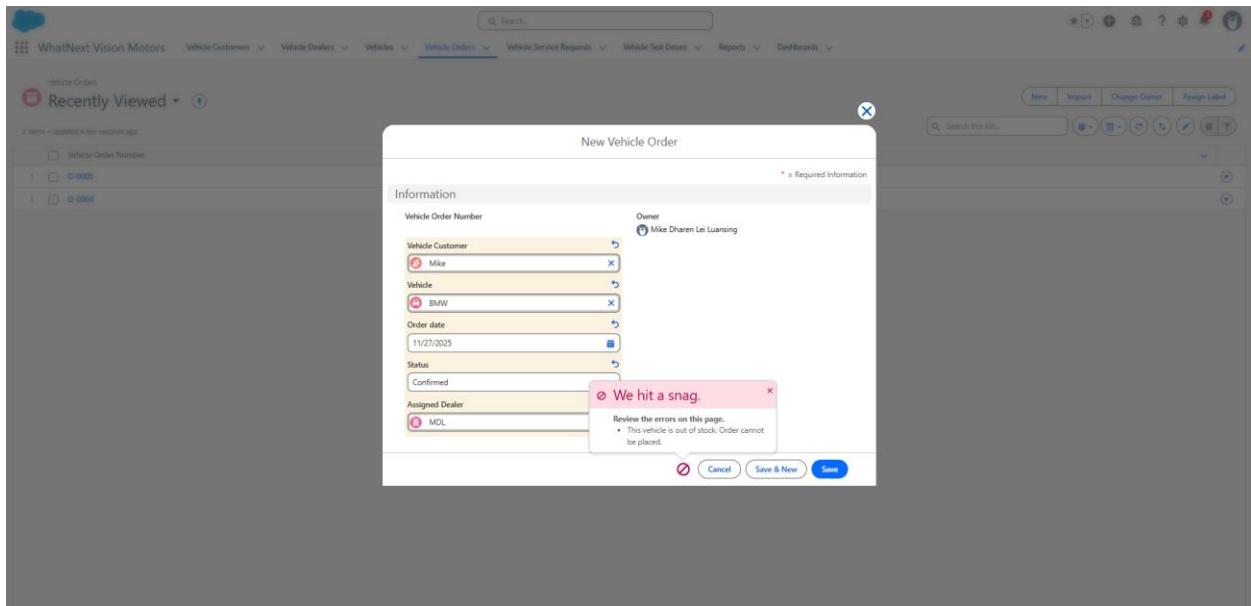
This flow is designed to enhance customer satisfaction and customers engagements. It also prevented missed appointments by notifying or reminding the customer about their test drive. The flow triggered the day before the scheduled test drive, the notification or reminder is sent via email.



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

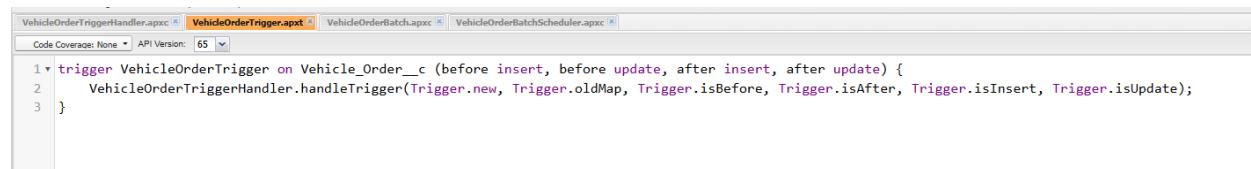
- Schedules a batch process to run daily at a specified time, it ensures automated updates, data processing, or status synchronization without manual intervention.

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.');
31             }
32         }
33     }
34 }
35
36     // ✅ Decrease stock when an order is confirmed
37     private static void updateStockOnOrderPlacement(List<Vehicle_Order__c> orders) {
38         Set<Id> vehicleIds = new Set<Id>();
39         for (Vehicle_Order__c order : orders) {
40             if (order.Vehicle__c != null && order.Status__c == 'Confirmed') {
41                 vehicleIds.add(order.Vehicle__c);
42             }
43         }
44
45         if (!vehicleIds.isEmpty()) {
46             Map<Id, Vehicle__c> vehicleStockMap = new Map<Id, Vehicle__c>(
47                 [SELECT Id, Stock_Quantity__c FROM Vehicle__c WHERE Id IN :vehicleIds]
48             );
49
50             List<Vehicle__c> vehiclesToUpdate = new List<Vehicle__c>();
51             for (Vehicle_Order__c order : orders) {
52                 Vehicle__c vehicle = vehicleStockMap.get(order.Vehicle__c);
53                 if (vehicle != null && vehicle.Stock_Quantity__c > 0) {
54                     vehicle.Stock_Quantity__c -= 1;
55                     vehiclesToUpdate.add(vehicle);
56                 }
57             }
58
59             if (!vehiclesToUpdate.isEmpty()) {
60                 update vehiclesToUpdate;
61             }
62         }
63     }
64 }
```

Vehicle Order Trigger



The screenshot shows the Salesforce Apex trigger editor. At the top, there are tabs for 'VehicleOrderTriggerHandler.apxc' (selected), 'VehicleOrderTrigger.apxt' (highlighted in blue), 'VehicleOrderBatch.apxc', and 'VehicleOrderBatchScheduler.apxc'. Below the tabs, there is a dropdown for 'Code Coverage: None' and 'API Version: 65'. The main area contains the Apex trigger code:

```
trigger VehicleOrderTrigger on Vehicle_Order__c (before insert, before update, after insert, after update) {
    VehicleOrderTriggerHandler.handleTrigger(Trigger.new, Trigger.oldMap, Trigger.isBefore, Trigger.isAfter, Trigger.isInsert, Trigger.isUpdate);
}
```

Vehicle Order Batch

```
VehicleOrderTriggerHandler.apxc | VehicleOrderTrigger.apxt | VehicleOrderBatch.apxc | VehicleOrderBatchScheduler.apxc
Code Coverage: None | API Version: 65
1 * global class VehicleOrderBatch implements Database.Batchable<sObject> {
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.');
42    }
43}
```

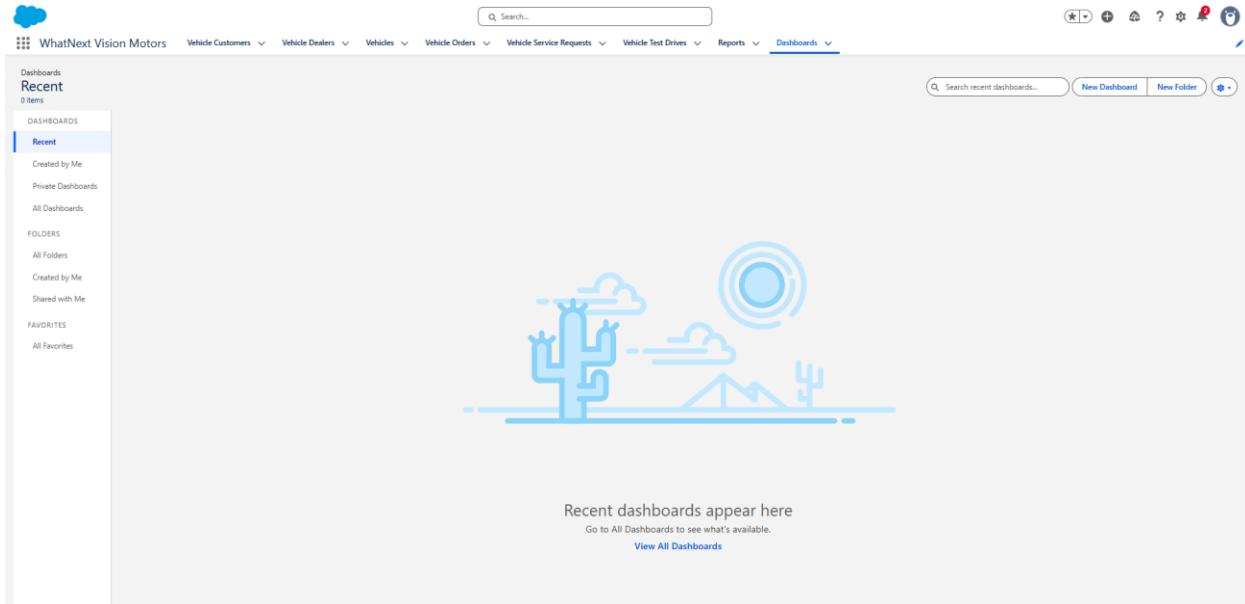
Vehicle Order Batch Scheduler

```
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

The screenshot displays the Salesforce interface for the 'Vehicle Customers' list. At the top, there is a navigation bar with links for 'Vehicle Customers', 'Vehicle Dealers', 'Vehicles', 'Vehicle Orders', 'Vehicle Service Requests', 'Vehicle Test Drives', 'Reports', and 'Dashboards'. Below the navigation bar, there is a search bar labeled 'Search...' and a toolbar with various icons. On the left, a sidebar titled 'Recently Viewed' shows two items: 'Mike' and 'Dharen'. The main area is a table with columns for 'Vehicle Customer Name' and other fields. The table contains two rows, both of which are collapsed. The first row is for 'Mike' and the second for 'Dharen'. There are also buttons for 'New', 'Import', 'Change Owner', and 'Assign Label' at the top right of the table area.

Vehicle Dealers

This screenshot shows the 'Vehicle Dealers' list view in a CRM application. The top navigation bar includes links for 'Vehicle Customers', 'Vehicle Dealers' (which is the active tab), 'Vehicles', 'Vehicle Orders', 'Vehicle Service Requests', 'Vehicle Test Drives', 'Reports', and 'Dashboards'. A search bar at the top right contains the placeholder 'Search...'. Below the navigation is a section titled 'Recently Viewed' with a refresh icon. A message indicates '1 item • Updated a few seconds ago'. The main list area has a header 'Dealer Name' with a checkbox column. One item is listed: 'MDL'. On the far right of the list are standard edit, delete, and other action buttons.

Vehicles

This screenshot shows the 'Vehicles' list view in a CRM application. The top navigation bar includes links for 'Vehicle Customers', 'Vehicle Dealers' (which is the active tab), 'Vehicles' (which is the current page), 'Vehicle Orders', 'Vehicle Service Requests', 'Vehicle Test Drives', 'Reports', and 'Dashboards'. A search bar at the top right contains the placeholder 'Search...'. Below the navigation is a section titled 'Recently Viewed' with a refresh icon. A message indicates '3 items • Updated a few seconds ago'. The main list area has a header 'Vehicle Name' with a checkbox column. Three items are listed: 'BMW', 'Suzuki', and 'Honda'. On the far right of the list are standard edit, delete, and other action buttons. At the bottom left of the screen, a URL is visible: https://cpgfarm-006071ee8-dev-ed-dev.lightning.force.com/lightning/o/Vehicle_Dealer__c?home.

Vehicle

This screenshot shows the 'Vehicle Orders' page within a CRM application. The top navigation bar includes links for 'Vehicle Customers', 'Vehicle Dealers', 'Vehicles', 'Vehicle Orders' (which is the active tab), 'Vehicle Service Requests', 'Vehicle Test Drives', 'Reports', and 'Dashboards'. A search bar at the top right contains the placeholder 'Search...'. Below the navigation is a 'Recently Viewed' section showing two items: 'O-0005' and 'O-0004'. The main content area displays a table with columns for 'Vehicle Order Number' and other details, with two rows corresponding to the items in the recent view list.

Orders

Vehicle

Service

Requests

This screenshot shows the 'Vehicle Service Requests' page within a CRM application. The top navigation bar includes links for 'Vehicle Customers', 'Vehicle Dealers', 'Vehicles', 'Vehicle Orders', 'Vehicle Service Requests' (active tab), 'Vehicle Test Drives', 'Reports', and 'Dashboards'. A search bar at the top right contains the placeholder 'Search...'. Below the navigation is a 'Recently Viewed' section showing one item: 'Mike'. The main content area displays a table with columns for 'Vehicle Service Request Name' and other details, with one row corresponding to the item in the recent view list.

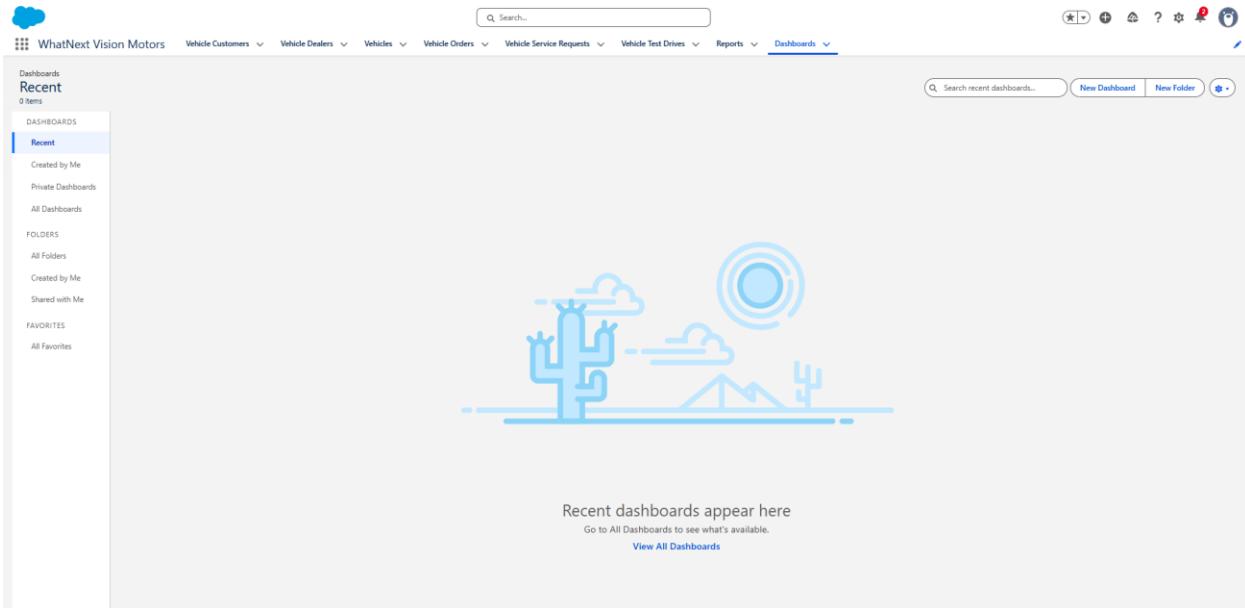
Vehicle Test Drives

The screenshot shows a software interface for managing vehicle test drives. At the top, there's a navigation bar with links for Vehicle Customers, Vehicle Dealers, Vehicles, Vehicle Orders, Vehicle Service Requests, Vehicle Test Drives (which is the active tab), Reports, and Dashboards. Below the navigation is a search bar and a "Recently Viewed" section indicating one item was updated a few seconds ago. The main content area displays a list titled "Vehicle Test Drive Name" with one item: "Mike". On the right side, there are buttons for New, Import, Change Owner, and Assign Label, along with a search bar for the list.

Reports

The screenshot shows a software interface for managing reports. The top navigation bar includes links for Vehicle Customers, Vehicle Dealers, Vehicles, Vehicle Orders, Vehicle Service Requests, Vehicle Test Drives, Reports (active tab), and Dashboards. A sidebar on the left lists categories: Reports (Recent, 0 items), Reports (Recent, Created by Me, Private Reports, Public Reports, All Reports), Folders (All Folders, Created by Me, Shared with Me), and Favorites (All Favorites). The main content area features a decorative illustration of a cactus, sun, and clouds. Below the illustration, text reads "Recent reports appear here. Go to All Reports to see what's available." and a "View All Reports" button.

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 shows a CRM application interface for 'WhatNext Vision Motors'. The top navigation bar includes links for Vehicle Customers, Vehicle Dealers, Vehicles, Vehicle Orders, Vehicle Service Requests, Vehicle Test Drives, Reports, and Dashboards. A search bar is located at the top right. The main content area displays a 'Vehicle Customer' record for 'Mike'. The record details are as follows:

Vehicle Customer Name	Owner
Mike	Mike Daren Lei Luanning
Email	darenlei21@gmail.com
Phone	(123) 456-7890
Address	Hyderabad
Preferred Vehicle Type	Sedan
Created By	Mike Daren Lei Luanning
Last Modified By	Mike Daren Lei Luanning

Below the details, there are tabs for 'Related' and 'Details', and a section for 'Last Modified By' showing the most recent activity.

Vehicle Dealers

The screenshot shows the 'Vehicle Dealers' section of the software. At the top, there's a navigation bar with links for Vehicle Customers, Vehicle Dealers (which is the active tab), Vehicles, Vehicle Orders, Vehicle Service Requests, Vehicle Test Drives, Reports, and Dashboards. Below the navigation is a search bar and a toolbar with various icons. The main area displays a single record for a vehicle dealer named 'MDL'. The record includes fields for Dealer Name, Dealer Location, Dealer Code, Phone, Email, and Created By. The 'Owner' field is populated with 'Mike Daren Lei Luensing'. A timestamp indicates the record was last modified on 11/26/2025 at 9:11 AM.

Vehicles

The screenshot shows the 'Vehicles' section of the software. The navigation bar is identical to the one above. The main area displays a single record for a vehicle named 'BMW'. The record includes fields for Vehicle Name, Vehicle Model, Stock Quantity, Price, Vehicle Dealer (set to 'MDL'), and Status (set to 'Out-of-stock'). The 'Owner' field is populated with 'Mike Daren Lei Luensing'. A timestamp indicates the record was last modified on 11/26/2025 at 7:28 PM.

Vehicle Order

This screenshot shows a vehicle order record for O-0005. The record is owned by Mike Daren Lei Luensing. The vehicle customer is Mike, the vehicle is Suzuki, and the order date is 11/26/2025. The status is confirmed, and the assigned dealer is MDL. The record was created by Mike Daren Lei Luensing on 11/26/2025 at 9:14 AM.

Field	Value
Vehicle Order Number	O-0005
Vehicle Customer	Mike
Vehicle	Suzuki
Order date	11/26/2025
Status	Confirmed
Assigned Dealer	MDL
Created By	Mike Daren Lei Luensing, 11/26/2025, 9:14 AM

Out-of- Stock Vehicle Order

This screenshot shows a new vehicle order form for a vehicle customer named Mike, vehicle BMW, and order date 11/27/2025. The status is confirmed, and the assigned dealer is MDL. A red error message box appears stating "We hit a snag" with the sub-instruction "Review the errors on this page." and a note "This vehicle is out of stock. Order cannot be placed." The "Save & New" button is highlighted in blue.

New Vehicle Order

Information

* Required Information

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

We hit a snag

Review the errors on this page.

* This vehicle is out of stock. Order cannot be placed.

Cancel Save & New Save

Vehicle Service Request

This screenshot shows the 'Vehicle Service Requests' section of a CRM application. The main title is 'Vehicle Service Request' with the name 'Mike'. The 'Details' tab is selected. The form contains the following fields:

Vehicle Service Request Name	Mike
Vehicle Customer	Mike
Vehicle	Suzuki
Service Date	11/27/2025
Issue Description	test
Status	Completed
Created By	Mike Dharen Lei Luensing , 11/26/2025, 6:10 PM

Owner: [Mike Dharen Lei Luensing](#)

Last Modified By: [Mike Dharen Lei Luensing](#), 11/26/2025, 6:10 PM

Navigation links at the top include: WhatNext Vision Motors, Vehicle Customers, Vehicle Dealers, Vehicles, Vehicle Orders, Vehicle Service Requests, Vehicle Test Drives, Reports, Dashboards.

Action buttons at the top right: New Contact, Edit, New Opportunity.

Vehicle Test Drives

This screenshot shows the 'Vehicle Test Drives' section of a CRM application. The main title is 'Vehicle Test Drive' with the name 'Mike'. The 'Details' tab is selected. The form contains the following fields:

Vehicle Test Drive Name	Mike
Vehicle Customer	Mike
Vehicle	Honda
Test Drive Date	11/27/2025
Status	Scheduled
Created By	Mike Dharen Lei Luensing , 11/26/2025, 9:18 AM

Owner: [Mike Dharen Lei Luensing](#)

Last Modified By: [Mike Dharen Lei Luensing](#), 11/26/2025, 9:18 AM

Navigation links at the top include: WhatNext Vision Motors, Vehicle Customers, Vehicle Dealers, Vehicles, Vehicle Orders, Vehicle Service Requests, Vehicle Test Drives, Reports, Dashboards.

Action buttons at the top right: New Contact, Edit, New Opportunity.

Reports

Recent reports appear here
Go to All Reports to see what's available.
[View All Reports](#)

Dashboards

Recent dashboards appear here
Go to All Dashboards to see what's available.
[View All 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 checked and reviewed weekly, ensuring accurate data and prevent conflicts when ordering.
- **Automation Update** – Automation process must be updated 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.