

PROJECT OVERVIEW

WhatsNext Vision Motors is a progressive automotive company committed to improving customer experience through digital solutions. To support this direction, a Salesforce CRM platform was developed to strengthen customer engagement, optimize dealer assignment, automate order handling, and maintain accurate stock monitoring. The system consolidates vehicle information, customer records, test drive schedules, orders, and service requests. It also automates dealer assignment and stock validation to ensure a smooth and reliable purchasing process. This implementation increases efficiency, reduces manual tasks, and enhances overall customer satisfaction.

OBJECTIVES

The CRM aims to streamline the vehicle purchasing and service workflow by establishing an automated, precise, and customer-oriented system. It improves customer management, accelerates dealer assignment, simplifies booking processes, and provides real-time stock visibility. By automating routine tasks, applying business rules, improving communication, and ensuring transparency, the system supports better productivity and builds stronger customer confidence.

UNDERSTANDING BUSINESS REQUIREMENTS

A review of the company's operational needs helped determine the essential functions the CRM must support. These requirements outline the key processes that need to be automated and monitored to ensure accuracy, efficiency, and a seamless experience for both customers and administrators.

The core business needs identified include:

- Assigning customers to the nearest dealer automatically.
- Preventing orders when vehicles are out of stock.
- Tracking vehicles, test drives, customers, orders, dealers, and service requests in a structured system.
- Sending automated reminders for scheduled test drives.
- Keeping order statuses accurate through scheduled and batch processing.
- Providing admins with dashboards and reports for business insights.

DEFINING PROJECT SCOPE AND OBJECTIVES

The project scope was established to address the identified requirements through targeted development, configuration, and automation. It outlines the technical components, system features, and administrative setups required to implement a functional and scalable CRM solution.

Scope includes:

- Creation of 6 custom objects with defined relationships.
- Automation using Flows, Apex Triggers, Batch Apex, and Scheduled Apex.
- Implementation of validation rules and stock-check mechanisms.
- Development of Lightning App for navigation of modules.
- User management and security configuration.
- Testing and deployment activities.

SECURITY MODEL INCLUDES

The security model was designed to ensure that users have the appropriate level of access based on their responsibilities. It defines how data is protected, how records are shared, and how key information is monitored to maintain system integrity and compliance.

- Profiles, Role Hierarchy, Permission Sets.
- Sharing settings for object-level and record-level access.
- Field history tracking for critical fields like Stock, Status, Email.

STAKEHOLDER MAPPING

The stakeholder mapping identifies the groups involved in using or benefiting from the CRM. It outlines their roles within the system and clarifies how each group interacts with the platform to support business operations.

- System Admin: Manages entire CRM, objects, and automations.
- Sales Staff: Uses the CRM to create orders and track customers.
- Dealers: Receives assigned orders and manages vehicle delivery.
- Customers: Indirect stakeholders benefiting from efficient service.

EXECUTION ROADMAP

The execution plan outlines the stages followed to build, verify, and deliver the CRM solution. Each phase focuses on a specific set of development and implementation activities to ensure a structured and reliable rollout.

1. Data Modeling → Object creation
2. Backend Automation → Triggers, batch jobs
3. UI Development → Lightning App, Page Layouts
4. Testing → Unit tests, flow tests, process validation
5. Deployment → Change Set deployment
6. Documentation & Maintenance

ENVIRONMENT SETUP & DEVOPS WORKFLOW

A dedicated Salesforce Developer Org was configured to safely design, develop, and test custom objects, fields, flows, and Apex components. All changes were managed systematically using Change Sets to ensure controlled deployment between environments. The Developer Console was used for efficient writing, debugging, and testing of Apex classes and triggers. A structured DevOps workflow was established to support version control, prevent conflicts, and maintain organized testing and deployment processes.

- Configured a dedicated Salesforce Developer Org to safely create and test custom objects, fields, flows, and Apex components.
- Managed all changes systematically using Change Sets to ensure controlled deployment between environments.
- Utilized the Developer Console for efficient writing, debugging, and testing of Apex classes and triggers.
- Established a streamlined DevOps workflow, supporting version control, conflict prevention, and structured testing and deployment.

CUSTOMIZATION OF OBJECTS, FIELDS, VALIDATION RULES

The CRM included the creation of custom objects to capture key business data and support automation:

- Vehicle__c
- Vehicle_Dealer__c
- Vehicle_Customer__c
- Vehicle_Order__c
- Vehicle_Test_Drive__c
- Vehicle_Service_Request__c

KEY FIELDS IN CUSTOM OBJECTS

Each custom object was designed with essential fields to capture critical business information and support automation, validation, and reporting. These fields ensure accurate tracking of inventory, customer preferences, order details, and scheduling.

- Stock_Quantity__c
- Status__c
- Dealer_Location__c
- Preferred_Vehicle_Type__c
- Order_Date__c
- Test_Drive_Date__c

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Search Setup

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SetupHomeObject Manager ▾

Object Manager

6 Items, Sorted by Label

🔍 vehicle

Schema Builder

Create ▾

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED	
Vehicle	Vehicle_c	Custom Object		11/25/2025	✓	▾
Vehicle Customer	Vehicle_Customer_c	Custom Object		11/25/2025	✓	▾
Vehicle Dealer	Vehicle_Dealer_c	Custom Object		11/25/2025	✓	▾
Vehicle Order	Vehicle_Order_c	Custom Object		11/25/2025	✓	▾
Vehicle Service Request	Vehicle_Service_Request_c	Custom Object		11/25/2025	✓	▾
Vehicle Test Drive	Vehicle_Test_Drive_c	Custom Object		11/25/2025	✓	▾

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Search Setup

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SetupHomeObject Manager ▾

Vehicle

Details

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

Details

Description

API Name
Vehicle_c

Custom

✓

Singular Label
Vehicle

Plural Label
Vehicles

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings

Standard salesforce.com Help Window

EditDelete

philippines.myskillwallet... Vehicle Customer | Salesforce Recently Viewed | Vehicle Auto Assign Dealer - V1 Test Drive Reminder - V1 Developer Console

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Setup Home 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

Details

Description

API Name
Vehicle_Customer__c

Custom
✓

Singular Label
Vehicle Customer

Plural Label
Vehicle Customers

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
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Setup Home Object Manager

Vehicle Dealer

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

Details

Description

API Name
Vehicle_Dealer__c

Custom
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Singular Label
Vehicle Dealer

Plural Label
Vehicle Dealers

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

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Setup Home Object Manager

Vehicle Order

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

Details

Description

API Name
Vehicle_Order_c

Custom
✓

Singular Label
Vehicle Order

Plural Label
Vehicle Orders

Enable Reports
✓

Track Activities

Track Field History

Deployment Status
Deployed

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Setup Home Object Manager

Vehicle Service Request

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

Details

Description

API Name
Vehicle_Service_Request_c

Custom
✓

Singular Label
Vehicle Service Request

Plural Label
Vehicle Service Requests

Enable Reports
✓

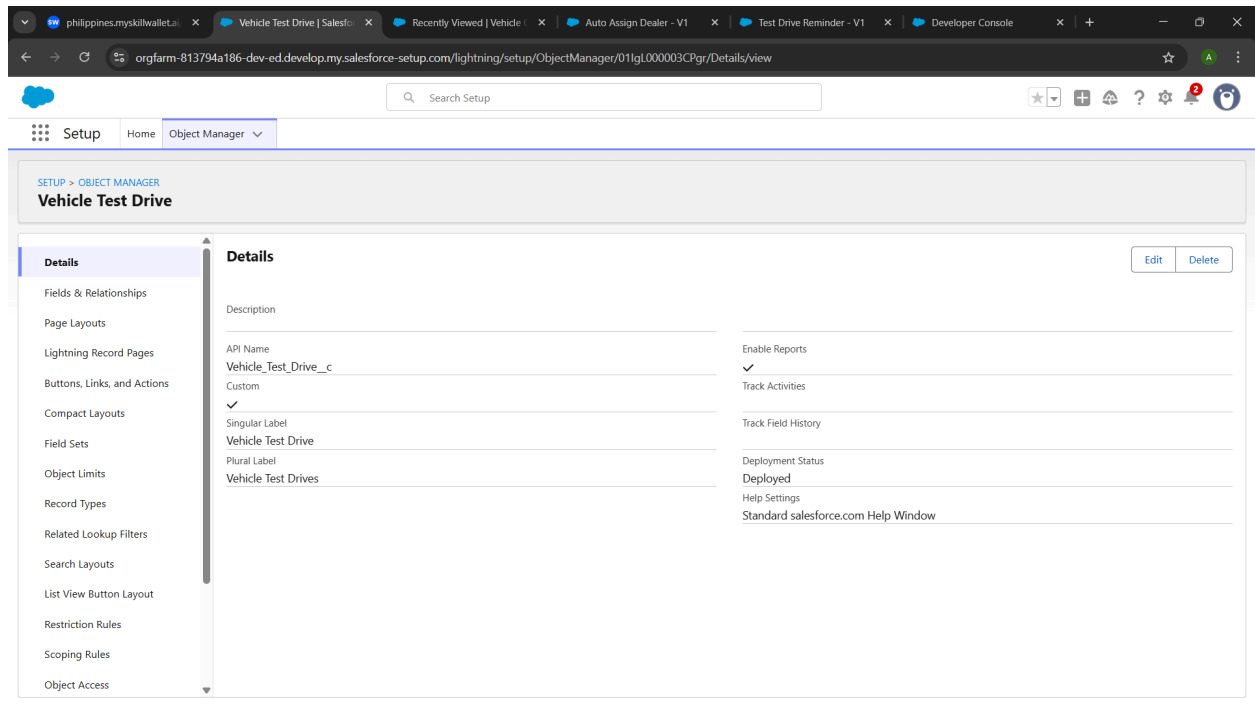
Track Activities

Track Field History

Deployment Status
Deployed

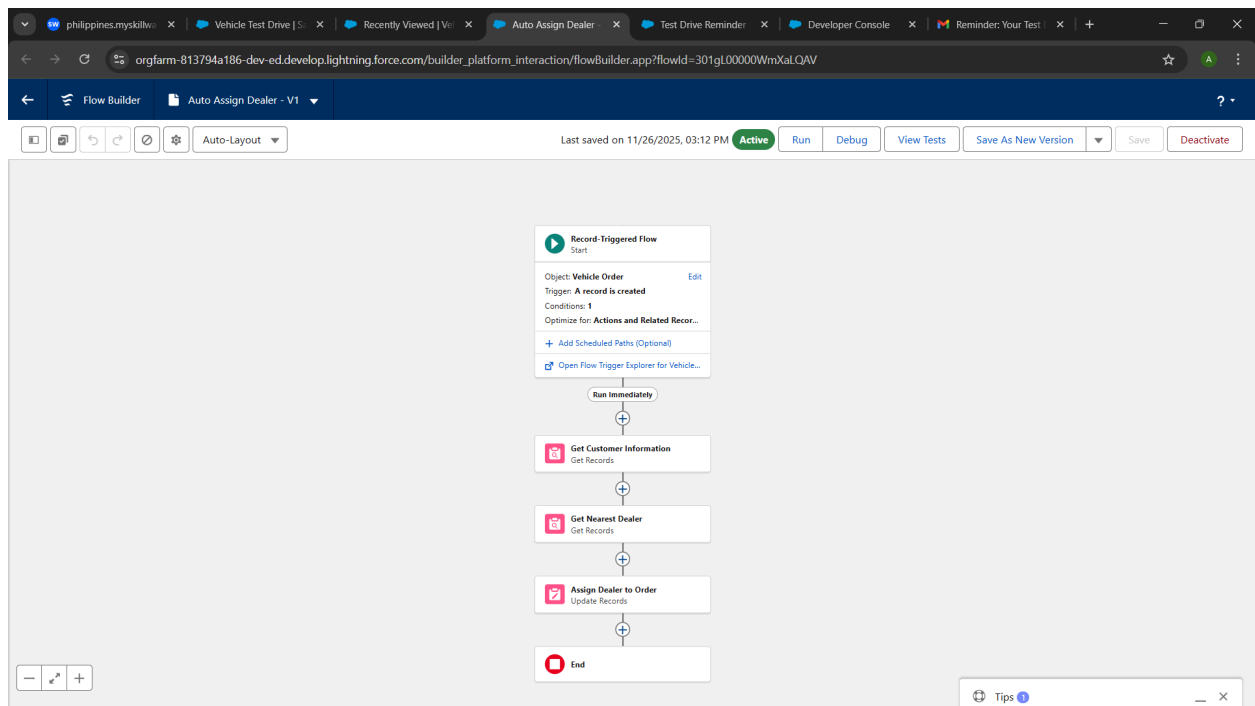
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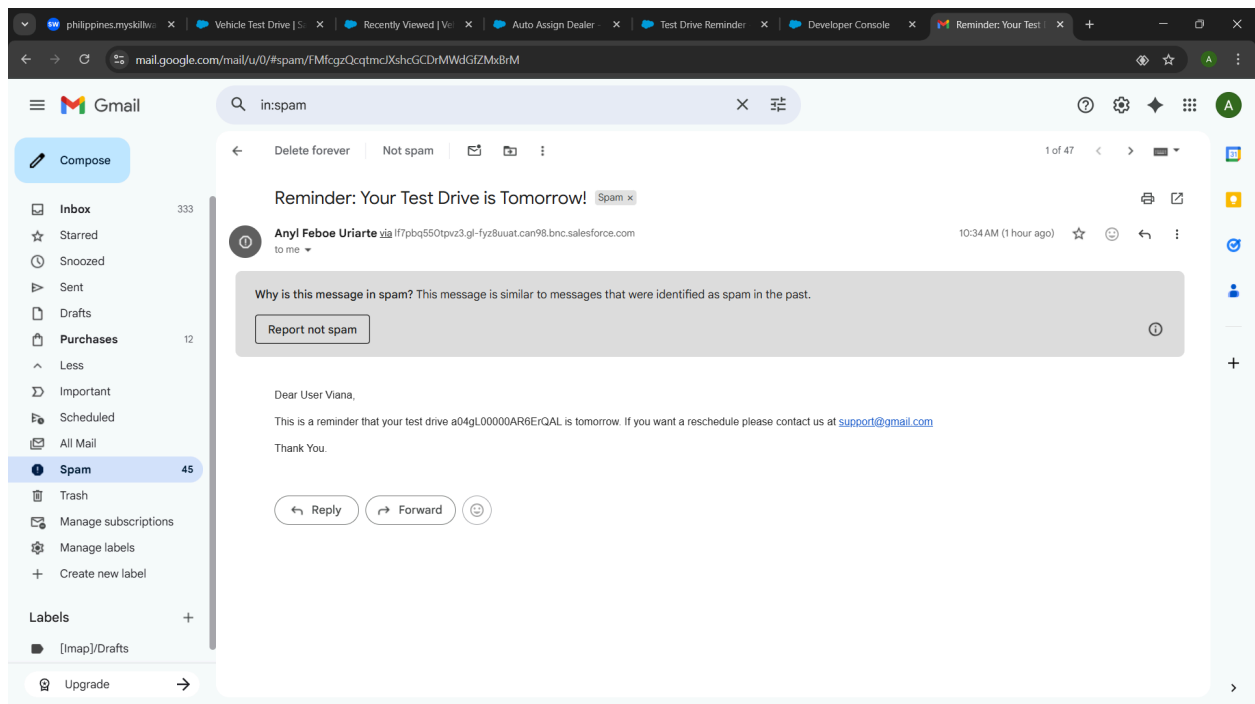
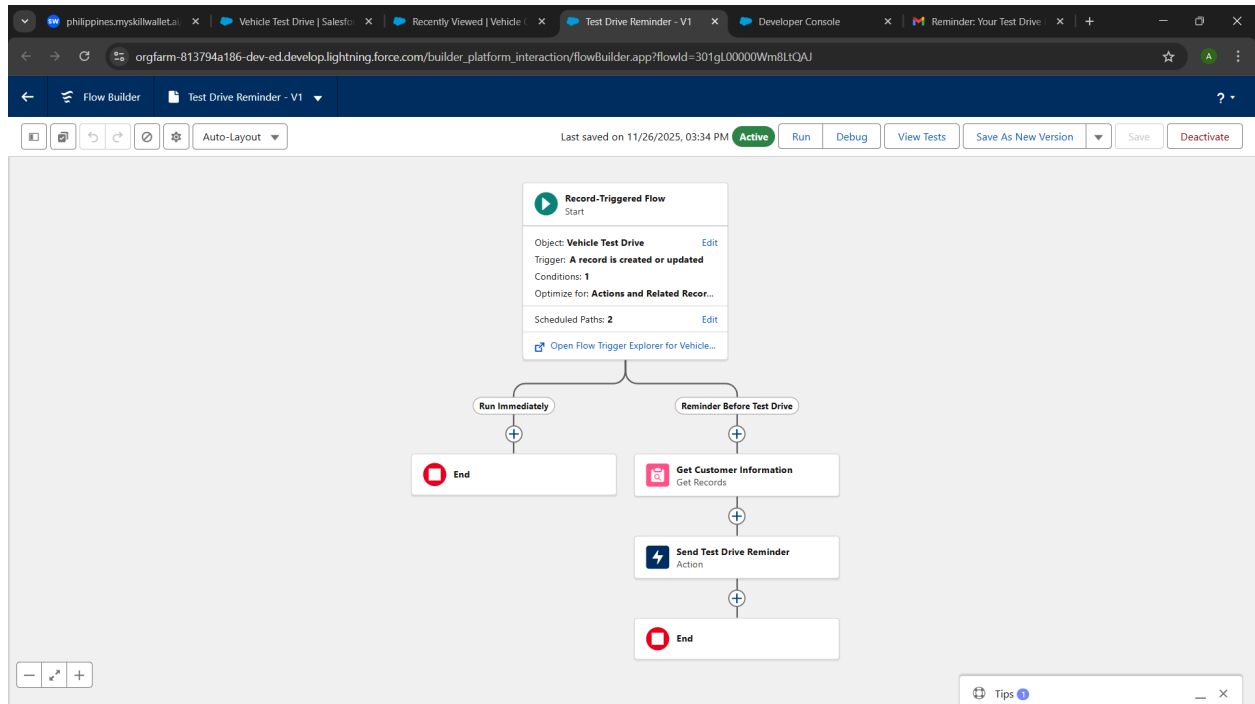


AUTOMATION

Record-Triggered Flows



Test Drive Email Reminder



APEX CLASSES AND TRIGGERS

The CRM uses Apex components to manage complex logic that cannot be handled by declarative tools alone. These classes and triggers ensure that stock levels, order statuses, and automated processes remain accurate and consistent across the system.

Apex Trigger Handler

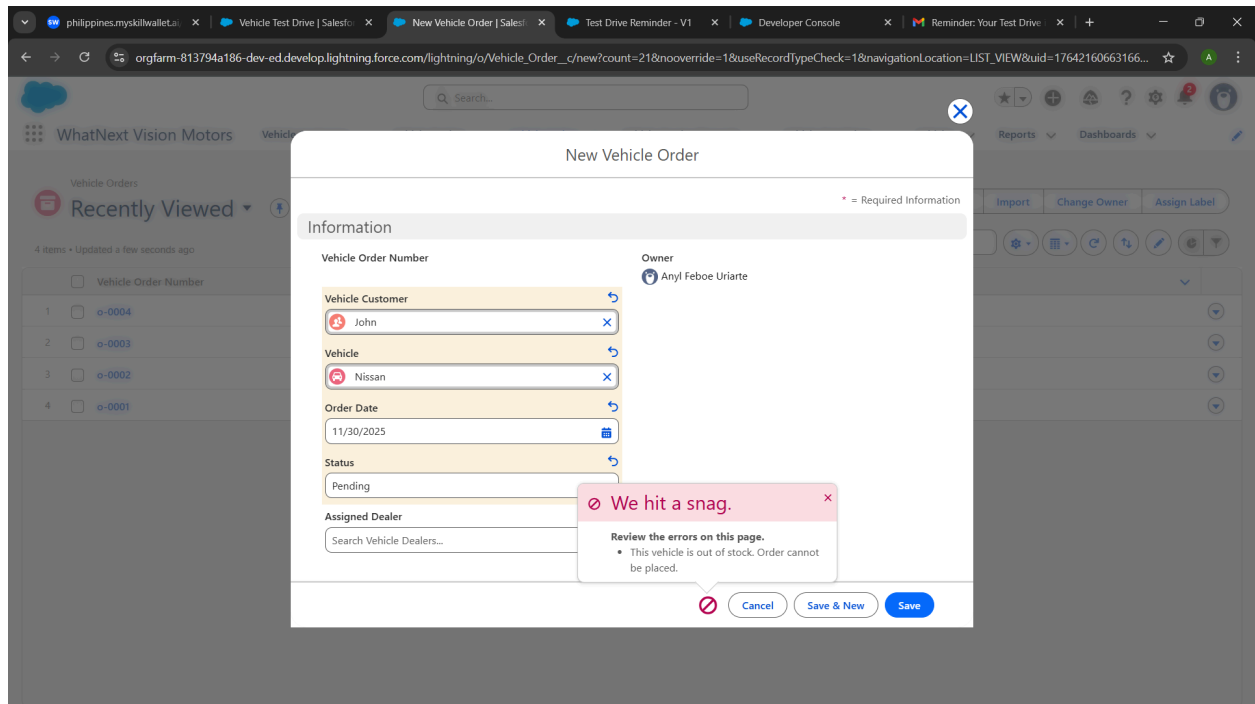
The trigger handler manages core order and stock logic, ensuring data accuracy during record creation and updates.

Handles:

- Preventing orders if the vehicle is out of stock.
- Reducing vehicle stock when order is confirmed.

Trigger

Executed before and after insert and update events on **Vehicle_Order__c**, allowing the system to validate requests and update stock in real time.



Asynchronous Apex

Batch Apex

- Checks all pending orders.
- If vehicle stock is replenished, updates order to Confirmed.
- Reduces stock automatically.

Scheduled Apex

- Schedules the batch process to run daily at a defined time.

philippines.myskillwallet... X | Vehicle Test Drive | Salesf... X | New Vehicle Order | Salesf... X | Test Drive Reminder - V1 X | Developer Console X | Reminder: Your Test Drive X | +

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File Edit Debug Test Workspace Help < >

VehicleOrderBatch.apxc VehicleOrderTriggerHandler.apxc VehicleOrderBatchScheduler.apxc

Code Coverage: None API Version: 65 Go To

```
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 }
```

Logs, Tests, and Problems

```
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 }
```

Logs Tests Checkpoints Query Editor View State Progress Problems

User	Application	Operation	Time	Status	Read	Size
------	-------------	-----------	------	--------	------	------

Filter Click here to filter the log list

LIGHTNING APP SETUP

The Lightning App was designed to provide users with organized navigation and easy access to all major CRM modules. The layout supports efficient workflows for administrators, sales staff, and dealers.

Created “WhatsNext Vision Motors” App:

- Navigation Items: Vehicles, Vehicle Dealers, Vehicle Customers, Vehicle Orders, Vehicle Test Drives, Vehicle Service Request, Reports, Dashboards

PAGE LAYOUTS AND DYNAMIC FORMS

Page layouts and dynamic forms were configured to tailor data visibility and editing capabilities based on user responsibilities, improving usability and maintaining data security.

- Customized layouts for each object.
- Displayed fields based on user roles.
- Conditional visibility applied where required.

USER MANAGEMENT

User access was managed through profile assignments and app permissions to ensure appropriate levels of system access.

- Assigned profiles (System Administrator).
- Configured app access for users.

REPORTS AND DASHBOARDS

Reports and dashboards were created to provide insights into stock levels, dealer performance, and test drive activity.

- Vehicle Stock Report
- Dealer Assignment Report
- Test Drive Summary

LIGHTNING PAGES

Custom Lightning record pages were designed to improve data organization and help users quickly view related records and actions.

- Custom record pages for Vehicle, Dealer, Customer.
- Related lists and quick actions added.

Browser tabs: philippines.myskillwallet.ai/das... Recently Viewed | Vehicle Deal... Recently Viewed | Vehicle Order... Test Drive Reminder - V1 Reminder: Your Test Drive is To...

Address bar: orgfarm-813794a186-dev-ed.develop.lightning.force.com/lightning/o/Vehicle_Dealer__c/list?filterName=__Recent

WhatNext Vision Motors

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

Vehicle Dealers

Recently Viewed ▾ ⓘ

New Import Change Owner Assign Label

5 items • Updated a few seconds ago

Search this list...

<input type="checkbox"/>	Vehicle Dealer Name	
1 <input type="checkbox"/>	Lyna	⌵
2 <input type="checkbox"/>	josh	⌵
3 <input type="checkbox"/>	Juan	⌵
4 <input type="checkbox"/>	Jane	⌵
5 <input type="checkbox"/>	Bill	⌵

Browser tabs: philippines.myskillwallet.ai/das... Recently Viewed | Vehicle Order... Recently Viewed | Vehicle Order... Test Drive Reminder - V1 Reminder: Your Test Drive is To...

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WhatNext Vision Motors

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

Vehicle Orders

Recently Viewed ▾ ⓘ

New Import Change Owner Assign Label

4 items • Updated a few seconds ago

Search this list...

<input type="checkbox"/>	Vehicle Order Number	
1 <input type="checkbox"/>	o-0004	⌵
2 <input type="checkbox"/>	o-0003	⌵
3 <input type="checkbox"/>	o-0002	⌵
4 <input type="checkbox"/>	o-0001	⌵

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orgfarm-813794a186-dev-ed.develop.lightning.force.com/lightning/o/Vehicle_Service_Request__c/list?filterName=__Recent

Search...

WhatNext Vision MotorsVehicle CustomersVehicle DealersVehicle OrdersVehicle Service RequestsVehicle Test DrivesVehiclesReportsDashboards


Vehicle Service Requests

Recently Viewed

0 items • Updated a few seconds ago

NewImportChange OwnerAssign Label

Search this list...



Nothing to see here

There's nothing in your list yet. Try adding a new record.

philippines.myskillwallet.ai/das...Recently Viewed | Vehicle Test...Recently Viewed | Vehicle Order...Test Drive Reminder - V1Reminder: Your Test Drive is To...+

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Search...

WhatNext Vision MotorsVehicle CustomersVehicle DealersVehicle OrdersVehicle Service RequestsVehicle Test DrivesVehiclesReportsDashboards

Vehicle Test Drives

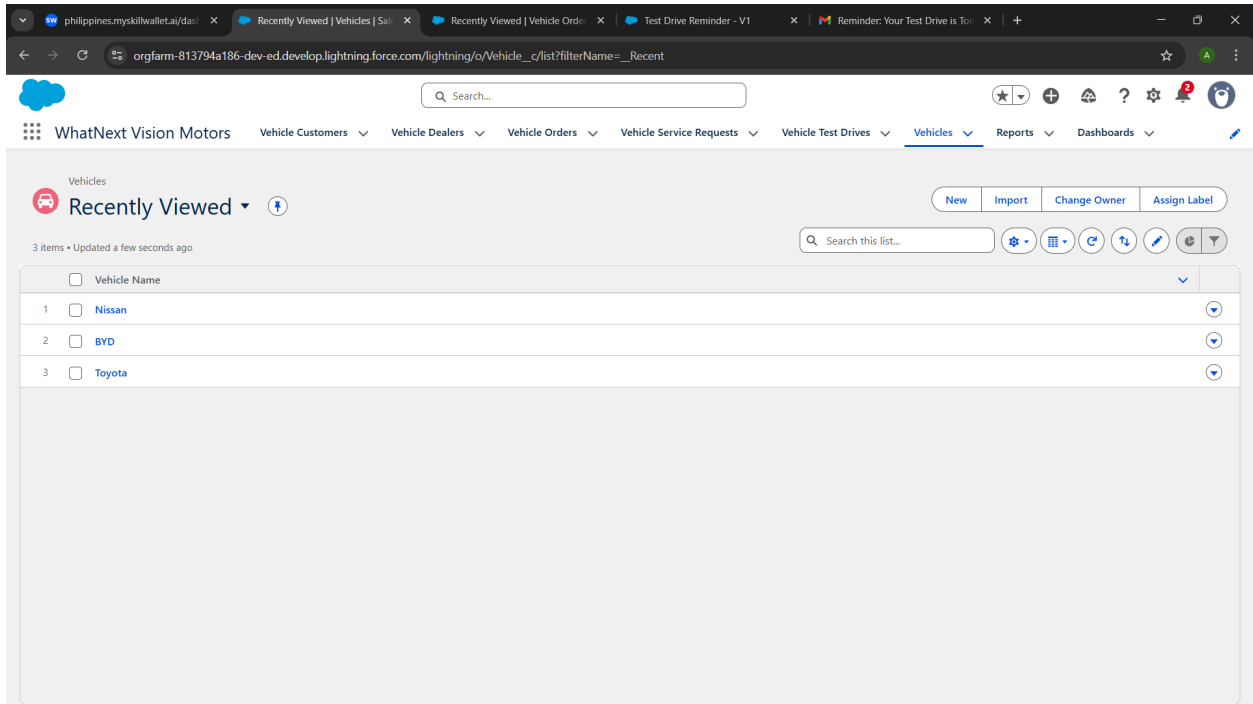
Recently Viewed

2 items • Updated a few seconds ago

NewImportChange OwnerAssign Label

Search this list...

	<input type="checkbox"/> Vehicle Test Name	
1	<input type="checkbox"/> zz	
2	<input type="checkbox"/> xyz	



DATA LOADING PROCESS

Sample data was added to support system testing and demonstrate functionality. For larger data imports, Salesforce tools such as the Data Import Wizard and Data Loader are also available.

Sample customer, dealer, and vehicle records were added to support testing. In this project, records were created manually through the Salesforce interface, though Salesforce also provides tools such as the Data Import Wizard and Data Loader for importing larger datasets if needed. These tools allow for guided uploads and bulk data entry without writing code.

SECURITY CONFIGURATIONS

Security settings were implemented to ensure proper data protection and structured access across the organization.

The security model was configured to ensure proper data access across the organization. Profiles were set up to control CRUD permissions for each object, while the role hierarchy ensured that managers could automatically view dealer and customer records beneath them. Permission Sets were used to grant additional access to features such as test-drive reminders and reporting tools. Finally, Sharing Rules were implemented to provide controlled visibility for sales teams, ensuring they can only access the data relevant to their responsibilities.

FIELD HISTORY TRACKING

Field history tracking was enabled to monitor changes to important business fields and support audit requirements.

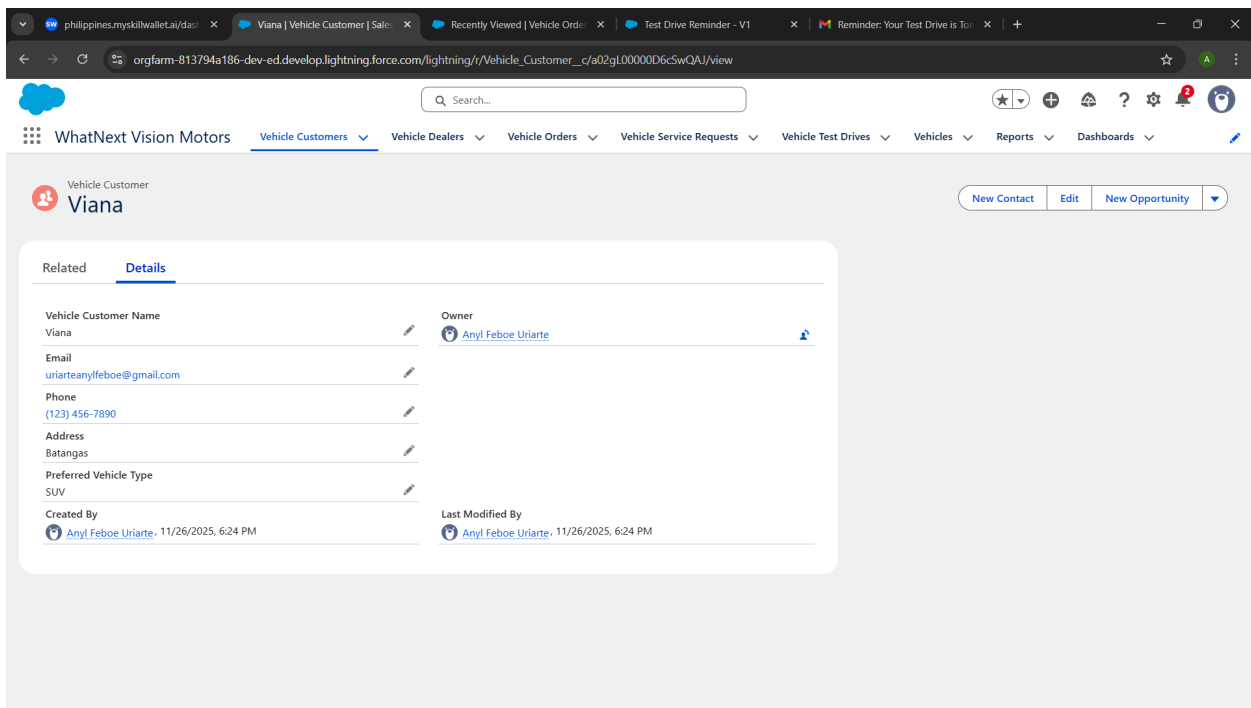
Enabled for:

- Stock_Quantity__c
- Status__c
- Order_Date__c

TESTING PROCESS

Testing focused on validating automation, trigger behavior, and batch processing to ensure the CRM functions reliably across all workflows.

Flow tests were conducted to ensure all automations performed correctly. The dealer assignment flow was validated using before-and-after screenshots, and the test drive reminder flow was confirmed to work by adjusting the test drive dates. Trigger functionality was also verified: when a user attempted to order an out-of-stock vehicle, the correct error message appeared, and when an order was marked as Confirmed, the system automatically reduced the vehicle’s stock. Batch Apex behavior was tested as well, confirming that pending orders were successfully auto-confirmed once the stock was updated.



philippines.myskillwallet.ai/das Lyna | Vehicle Dealer | Salesforce Recently Viewed | Vehicle Order Test Drive Reminder - V1 Reminder: Your Test Drive is To

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WhatNext Vision Motors Vehicle Customers Vehicle Dealers Vehicle Orders Vehicle Service Requests Vehicle Test Drives Vehicles Reports Dashboards

Vehicle Dealer
Lyna

New Contact Edit New Opportunity

Related Details

Vehicle Dealer Name	Lyna	Owner	Anyl Feboe Uriarte
Dealer Location	Batangas		
Dealer Code	DC-0004		
Phone	(123) 456-7890		
Email	salesforce@gmail.com		
Created By	Anyl Feboe Uriarte 11/26/2025, 6:25 PM	Last Modified By	Anyl Feboe Uriarte 11/26/2025, 6:25 PM

philippines.myskillwallet.ai/das o-0004 | Vehicle Order | Salesforce Recently Viewed | Vehicle Order Test Drive Reminder - V1 Reminder: Your Test Drive is To

orgfarm-813794a186-dev-ed.develop.lightning.force.com/lightning/r/Vehicle_Order_c/a03gl00000JEcwvQAD/view

WhatNext Vision Motors Vehicle Customers Vehicle Dealers Vehicle Orders Vehicle Service Requests Vehicle Test Drives Vehicles Reports Dashboards

Vehicle Order
o-0004

New Contact Edit New Opportunity

Related Details

Vehicle Order Number	o-0004	Owner	Anyl Feboe Uriarte
Vehicle Customer	Viana		
Vehicle	Nissan		
Order Date	11/30/2025		
Status	Confirmed		
Assigned Dealer	Lyna		
Created By	Anyl Feboe Uriarte 11/26/2025, 6:28 PM	Last Modified By	Anyl Feboe Uriarte 11/26/2025, 6:29 PM

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WhatNext Vision Motors Vehicle Customers Vehicle Dealers Vehicle Orders Vehicle Service Requests Vehicle Test Drives Vehicles Reports Dashboards

Vehicle Test Drive Request Test Drive 1 New Contact Edit New Opportunity

Related Details

Vehicle Test Name	Request Test Drive 1	Owner	Anyl Feboe Uriarte
Vehicle Customer	Viana		
Vehicle	Nissan		
Test Drive Date	11/28/2025		
Status	Scheduled		
Created By	Anyl Feboe Uriarte, 11/26/2025, 6:33 PM	Last Modified By	Anyl Feboe Uriarte, 11/26/2025, 8:22 PM

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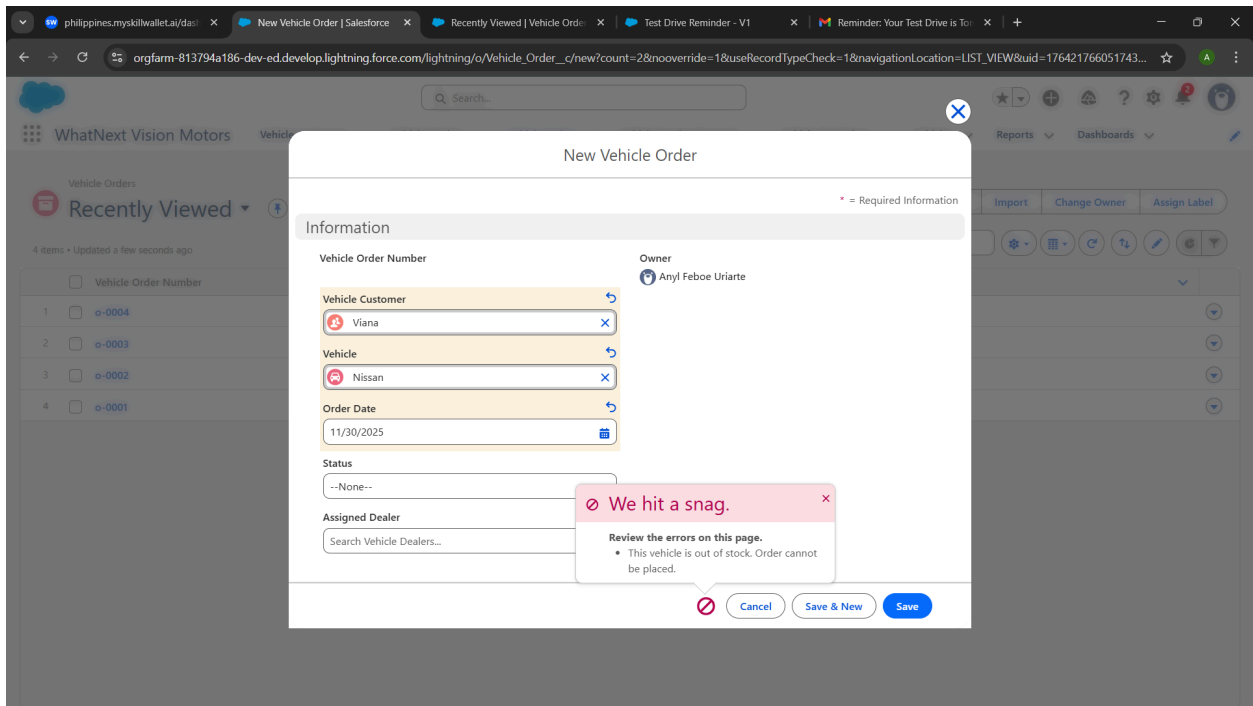
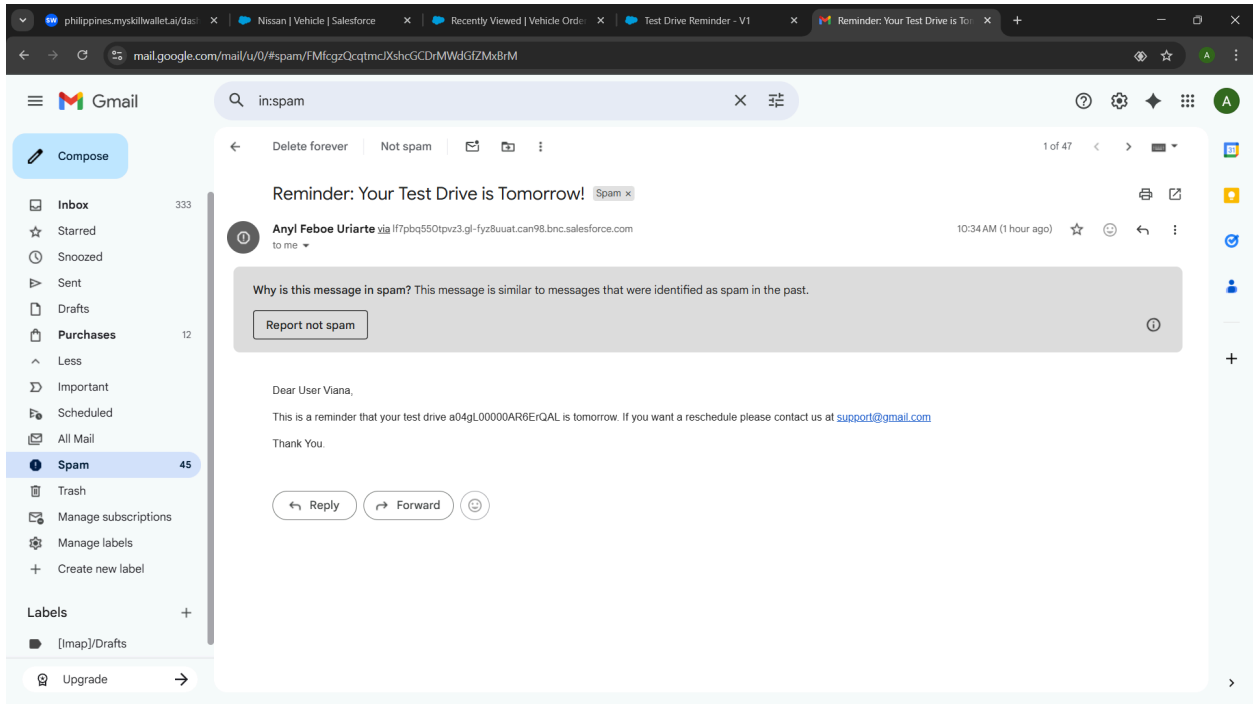
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WhatNext Vision Motors Vehicle Customers Vehicle Dealers Vehicle Orders Vehicle Service Requests Vehicle Test Drives Vehicles Reports Dashboards

Vehicle Nissan New Contact Edit New Opportunity

Related Details

Vehicle Name	Nissan	Owner	Anyl Feboe Uriarte
Vehicle Model	SUV		
Stock Quantity	0		
Price	\$25,000		
Vehicle Dealer	Lyna		
Status	Available		
Created By	Anyl Feboe Uriarte, 11/26/2025, 6:27 PM	Last Modified By	Anyl Feboe Uriarte, 11/26/2025, 6:29 PM



DEPLOYMENT STRATEGY

Deployment followed a controlled and documented process using Change Sets to ensure accurate migration of system components.

- All components deployed using Change Sets:
 - Custom Objects
 - Flows
 - Apex Classes & Triggers
 - Page Layouts
 - Reports and Dashboards

MAINTENANCE PLAN

Ongoing system maintenance ensures accuracy, optimal performance, and alignment with evolving business needs.

- Admin will monitor scheduled jobs.
- Vehicle stock levels will be reviewed weekly.
- Flows and triggers will be updated based on new business requirements.
- Quarterly audits for data accuracy and sharing settings.

TROUBLESHOOTING APPROACH

A structured troubleshooting procedure was established to diagnose issues with automation, Apex logic, and data integrity.

- Use Debug Logs to investigate flow or trigger issues.
- Use Setup → Paused & Failed Flow Interviews to diagnose flow failures.
- Apex exception logs reviewed for batch errors.
- Field history tracking supports data-related issues.

CONCLUSION

The Salesforce CRM developed for WhatsNext Vision Motors delivers a comprehensive and modernized solution for managing the full vehicle purchasing and service lifecycle. The system streamlines operations by automating dealer assignment, enforcing stock validation, generating email reminders, and using batch processes to maintain accurate order statuses. These capabilities reduce manual effort, minimize errors, and increase operational transparency. The CRM also centralizes all vehicle, customer, dealer, order, and service data, enabling informed decision-making through structured reporting and dashboards. With its scalable architecture, secure data model, and optimized workflows, the platform is well-prepared for real-world deployment. It lays a strong foundation for advanced features, broader integrations, and business growth. As the organization evolves, the CRM can support additional channels, predictive analytics, and enhanced customer engagement strategies, ensuring long-term value and adaptability.

FUTURE ENHANCEMENTS

- Chatbot integration for instant customer support: Implementing a Salesforce-powered chatbot would allow customers to get real-time assistance, ask questions about vehicles, check stock availability, or schedule test drives without waiting for a support agent.
- AI-powered suggestions for best dealer based on traffic or ratings: Using AI, the system could recommend the most suitable dealer for a customer by analyzing factors like dealer ratings, distance, and current traffic conditions, improving convenience and customer satisfaction.
- Integration with inventory management systems: Connecting Salesforce with external inventory systems would ensure that stock levels are always up-to-date and synchronized across all platforms, preventing stock discrepancies and improving order accuracy.
- Mobile App extension via Salesforce Mobile Publisher: Extending the CRM to a mobile application would enable sales reps and managers to access records, manage orders, and monitor stock on the go, providing flexibility and enhancing operational efficiency.