

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

Project Overview

The WhatNext Vision Motors CRM is designed to manage vehicle sales, customer information, service bookings, and internal workflows in one system.

It provides an organized flow of information across departments, improves customer engagement, and increases operational efficiency through Salesforce automation.

Objectives

The main objectives of the system are to:

- Improve vehicle sales operations
- Speed up service booking and order processing
- Centralize customer and vehicle data
- Automate follow-ups and reminders
- Provide insights through reports and dashboards

Overall, the CRM enhances **customer satisfaction, productivity, and data-driven decision-making.**

Phase 1: Requirement Analysis & Planning

Understanding Business Requirements

- Manage customer information (buyers, prospects, and service clients)
- Track vehicle inventory, bookings, sales, and service history
- Automate approval processes for purchases and financing
- Ensure accurate test drive scheduling and sales records

Project Scope

- Custom objects for **Vehicle, Booking, Sales Order, Payment, and Test Drive**
- Automated flows for **booking approvals, dealer assignment, and reminders**
- Reports and dashboards for **sales and inventory analysis**

Data Model & Security

- Relationships: **Customer** → **Booking** → **Vehicle** → **Payment**
- Security implementation:
 - Profiles and Roles
 - Sharing Rules
 - Field-Level Security for sensitive data such as vehicle pricing

Stakeholders

- Sales Agents
- Finance Team
- Service Team
- Managers / Admins
- Customers (indirect users)

Execution Roadmap

1. Requirement gathering
2. Data model setup
3. UI and automation development
4. Testing and data migration
5. Deployment and documentation

Phase 2: Salesforce Development – Backend & Configuration

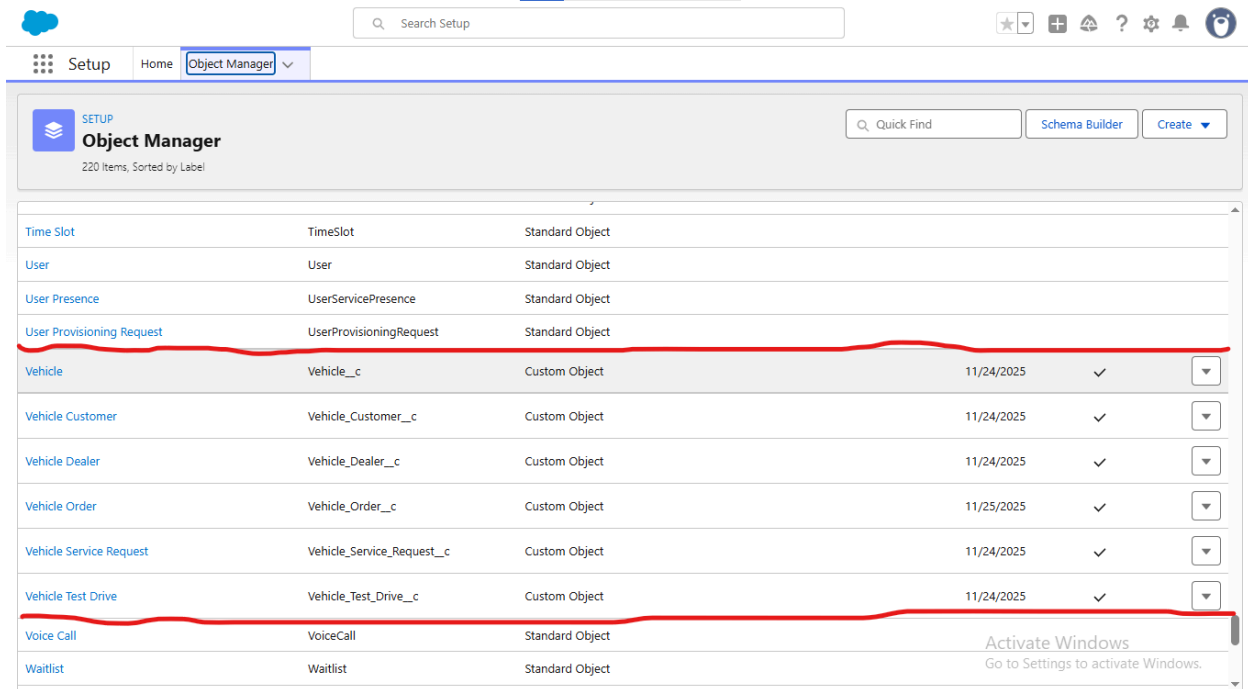
Environment Setup

- Salesforce Developer Org
- Organized metadata and custom objects
- Deployment using Change Sets

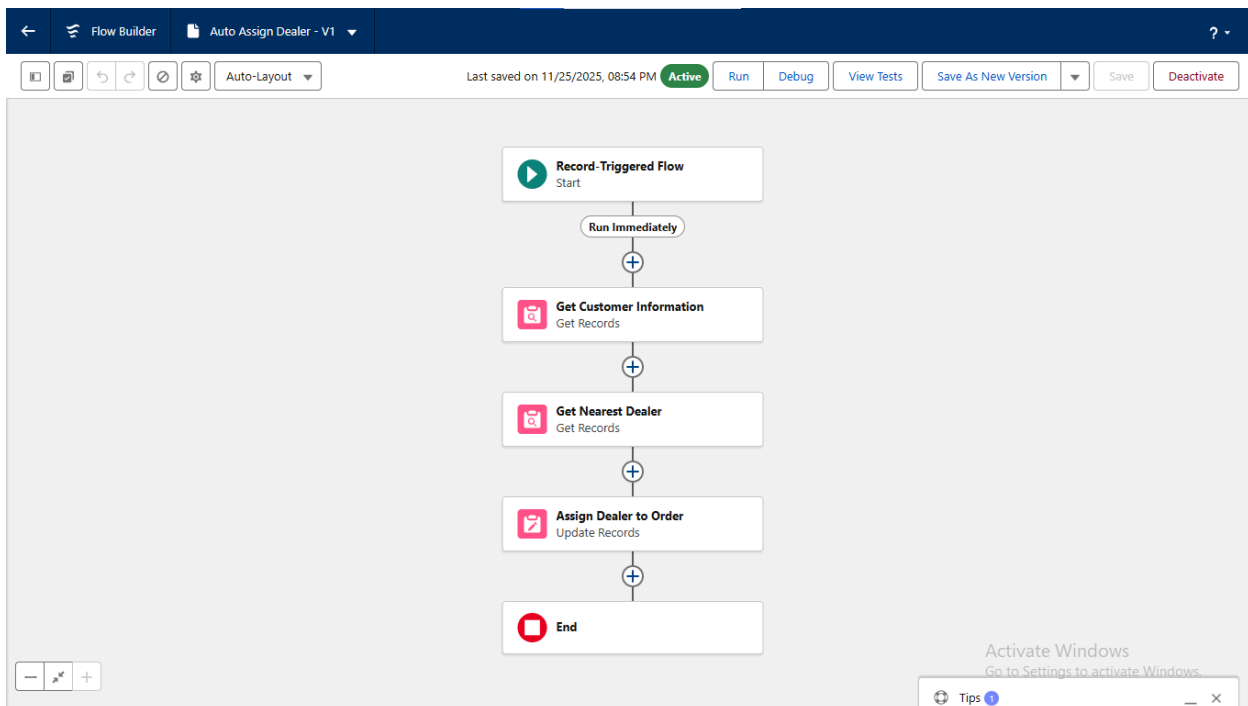
Customizations

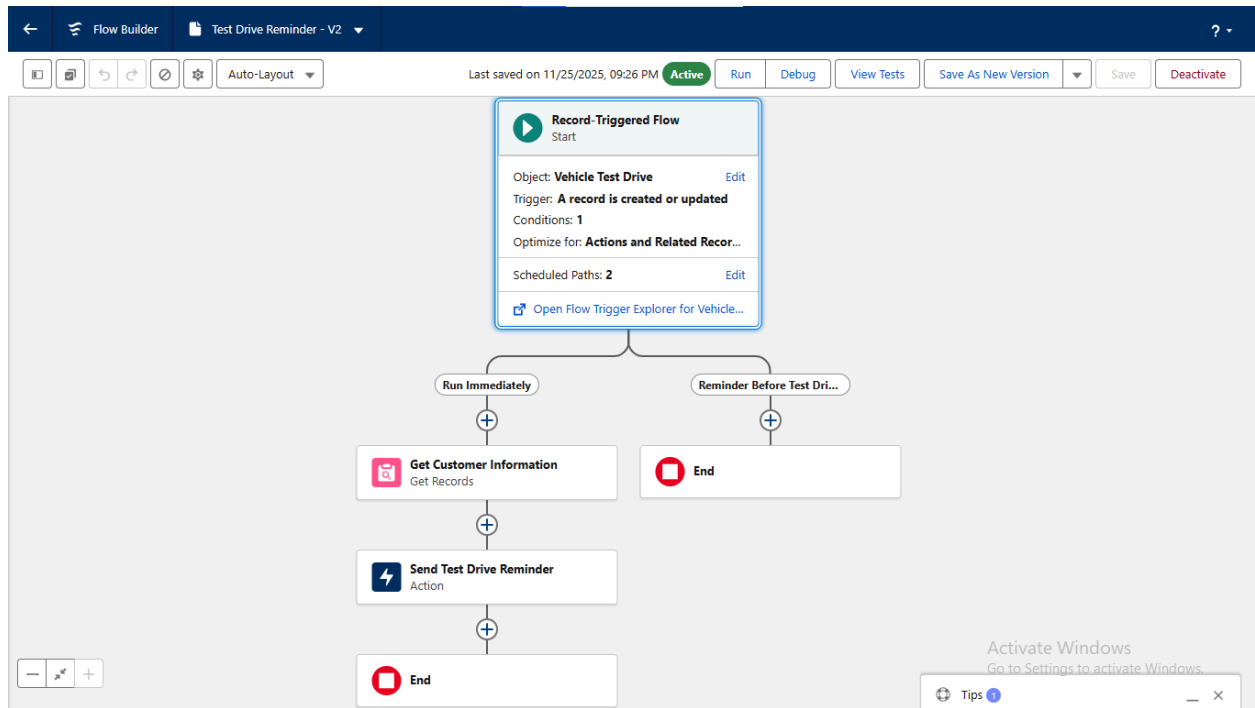
- **Custom Objects:** Vehicle, Vehicle Customer, Vehicle Dealer, Vehicle Order, Vehicle Service, Vehicle Test Drive
- **Validation Rules:** Prevent invalid booking dates and incomplete payments
- **Automation:** Salesforce Flows, Workflow Rules, Process Builder
- **Approval Process:** Purchase and financing approval

- **Apex Classes & Triggers:** VehicleOrderBatch, VehicleOrderBatchScheduler, VehicleOrderTrigger, VehicleOrderTriggerHandler



Object Name	API Name	Object Type	Created Date	Status	Actions
Time Slot	TimeSlot	Standard Object			
User	User	Standard Object			
User Presence	UserServicePresence	Standard Object			
User Provisioning Request	UserProvisioningRequest	Standard Object			
Vehicle	Vehicle__c	Custom Object	11/24/2025	✓	▼
Vehicle Customer	Vehicle_Customer__c	Custom Object	11/24/2025	✓	▼
Vehicle Dealer	Vehicle_Dealer__c	Custom Object	11/24/2025	✓	▼
Vehicle Order	Vehicle_Order__c	Custom Object	11/25/2025	✓	▼
Vehicle Service Request	Vehicle_Service_Request__c	Custom Object	11/24/2025	✓	▼
Vehicle Test Drive	Vehicle_Test_Drive__c	Custom Object	11/24/2025	✓	▼
Voice Call	VoiceCall	Standard Object			
Waitlist	Waitlist	Standard Object			





Phase 3: UI/UX Development & Customization

Lightning Application

- Created WhatNext Vision Motors CRM

Page Layouts & Dynamic Forms

- Vehicle record page with pricing and engine details
- Booking page with conditional field visibility

User Management

- Profiles: Sales User, Finance User, Admin
- Permission Sets: Payment Manager, Vehicle Editor

Reports & Dashboards

- Sales Performance Dashboard
- Vehicle Inventory Report
- Monthly Booking Summary

Lightning Pages & LWC (Optional)

- Custom home page with quick actions
- Vehicle Availability Checker (LWC)

This screenshot shows the Lightning Page for 'Vehicle Service Requests'. The page header includes the Salesforce logo, a search bar, and navigation tabs: Sales, Vehicle Service Requests (selected), Vehicle Test Drives, Vehicle Orders, Vehicle Customers, Vehicle Dealers, Vehicles, Home, Opportunities, and More. The main content area has a sub-header 'Vehicle Service Requests' with a filter 'All' and a '+ New' button. Below this are buttons for 'New', 'Import', 'Change Owner', 'Printable View', and 'Assign Label'. A search bar 'Search this list...' and a set of action icons (edit, delete, etc.) are also present. The table below shows 1 item, sorted by 'Vehicle Service Request Name' (ascending), with the entry 'Eme'. At the bottom right, there is a watermark: 'Activate Windows Go to Settings to activate Windows'.

Vehicle Service Requests

All

New Import Change Owner Printable View Assign Label

Search this list...

1 item • Sorted by Vehicle Service Request Name • Updated a few seconds ago

<input type="checkbox"/>	Vehicle Service Request Name ↑	
1	<input type="checkbox"/> Eme	

Activate Windows
Go to Settings to activate Windows

This screenshot shows the Lightning Page for 'Vehicle Test Drives'. The page header is identical to the previous one. The main content area has a sub-header 'Vehicle Test Drives' with a filter 'Recently Viewed' and a '+ New' button. Below this are buttons for 'New', 'Import', 'Change Owner', and 'Assign Label'. A search bar 'Search this list...' and a set of action icons are also present. The table below shows 1 item, sorted by 'Vehicle Test Drive Name' (ascending), with the entry 'hihi'. At the bottom right, there is a watermark: 'Activate Windows Go to Settings to activate Windows'.

Vehicle Test Drives

Recently Viewed


New Import Change Owner Assign Label

Search this list...

1 item • Updated a few seconds ago

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

Activate Windows
Go to Settings to activate Windows



SalesVehicle Service RequestsVehicle Test DrivesVehicle OrdersVehicle CustomersVehicle DealersVehiclesHomeOpportunitiesMore

Vehicle Orders

Recently Viewed


NewImportChange OwnerAssign Label

1 item • Updated a few seconds ago

	<input type="checkbox"/> Vehicle Order Name	
1	<input type="checkbox"/> Amans	

Activate Windows
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To Do List



SalesVehicle Service RequestsVehicle Test DrivesVehicle OrdersVehicle CustomersVehicle DealersVehiclesHomeOpportunitiesMore

Vehicle Customers

Recently Viewed


NewImportChange OwnerAssign Label

2 items • Updated a few seconds ago








	<input type="checkbox"/> Vehicle Customer Name	
1	<input type="checkbox"/> Ray	
2	<input type="checkbox"/> Abi	

Activate Windows
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To Do List



Search...



SalesVehicle Service RequestsVehicle Test DrivesVehicle OrdersVehicle CustomersVehicle DealersVehiclesHomeOpportunitiesMore

Vehicle Dealers

Recently Viewed

NewImportChange OwnerAssign Label


Search this list...

items • Updated a few seconds ago








	<input type="checkbox"/> Dealer Name	
1	<input type="checkbox"/> Angel	
2	<input type="checkbox"/> Gael	

Activate Windows
Go to Settings to activate Windows.

To Do List



Search...



SalesVehicle Service RequestsVehicle Test DrivesVehicle OrdersVehicle CustomersVehicle DealersVehiclesHomeOpportunitiesMore

Vehicles

Recently Viewed

NewImportChange OwnerAssign Label

Search this list...

items • Updated a few seconds ago

	<input type="checkbox"/> Vehicle Name	
1	<input type="checkbox"/> Jaja	
2	<input type="checkbox"/> Honda	

Activate Windows
Go to Settings to activate Windows.

To Do List

Phase 4: Data Migration, Testing & Security

Data Migration

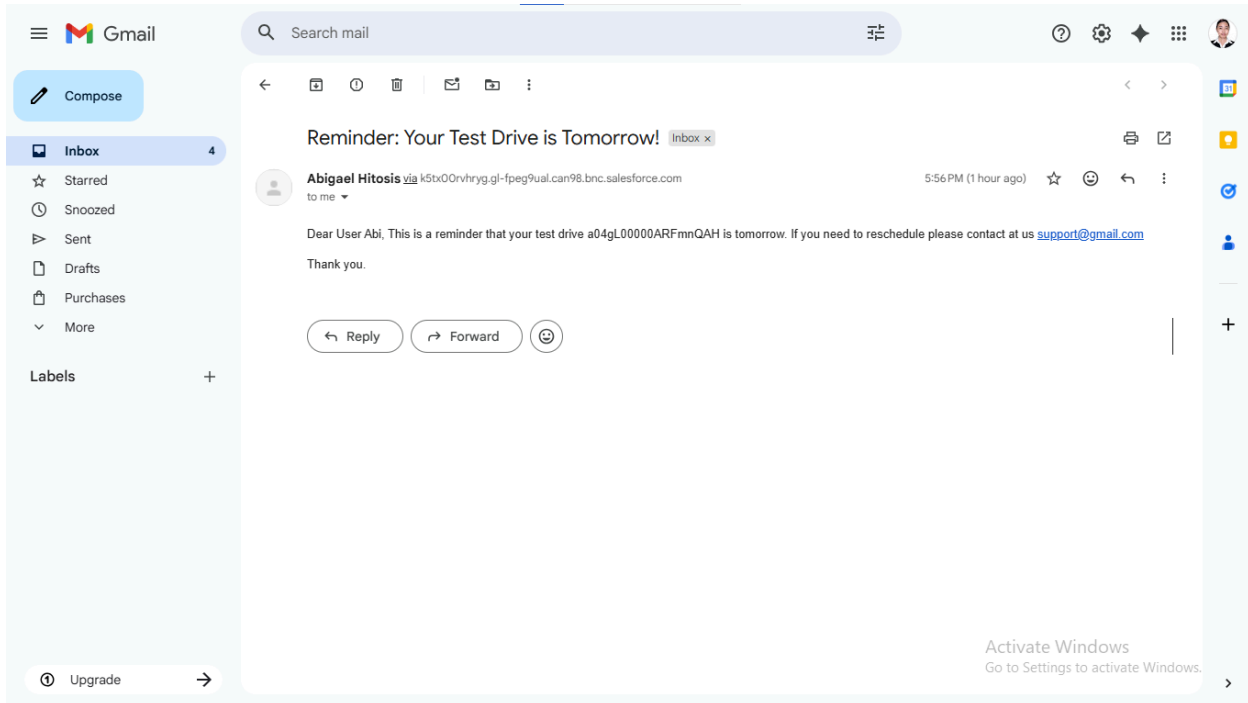
- Data Import Wizard for Customers and Vehicles
- Data Loader for Bookings and Payments

Security Configuration

- Field History Tracking (Vehicle Price, Booking Status)
- Duplicate and Matching Rules for customer records
- Profiles, Roles, Sharing Rules, and Permission Sets

Testing

- Apex Test Classes for triggers and automation
- Test Cases:
 - Booking creation
 - Approval process
 - Payment recording
 - Automated task creation
 - Flow trigger validation



Phase 5: Deployment, Documentation & Maintenance

Deployment

- Change Sets from Sandbox to Production
- Pre-deployment validation

Maintenance

- Regular checks on automation and data accuracy
- Monitoring using Debug Logs and Setup Audit Trail

Troubleshooting Documentation

- Common issues and solutions (flow errors, permission problems)

Conclusion

The WhatNext Vision Motors Salesforce CRM provides a fully automated and centralized system for managing customers, vehicle inventory, bookings, and payments.

By using Salesforce automation, Apex development, secure data management, and custom reporting, the system improves efficiency and enhances overall business performance.