

# **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

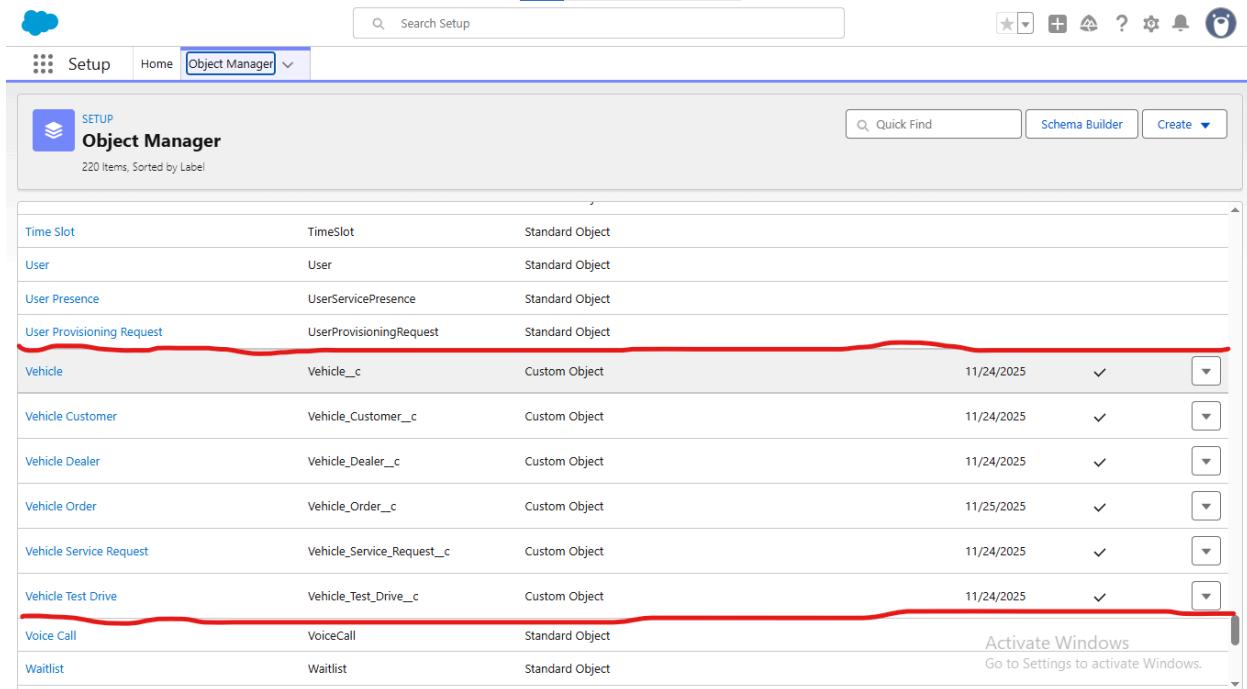
## Environment Setup

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

## Customizations

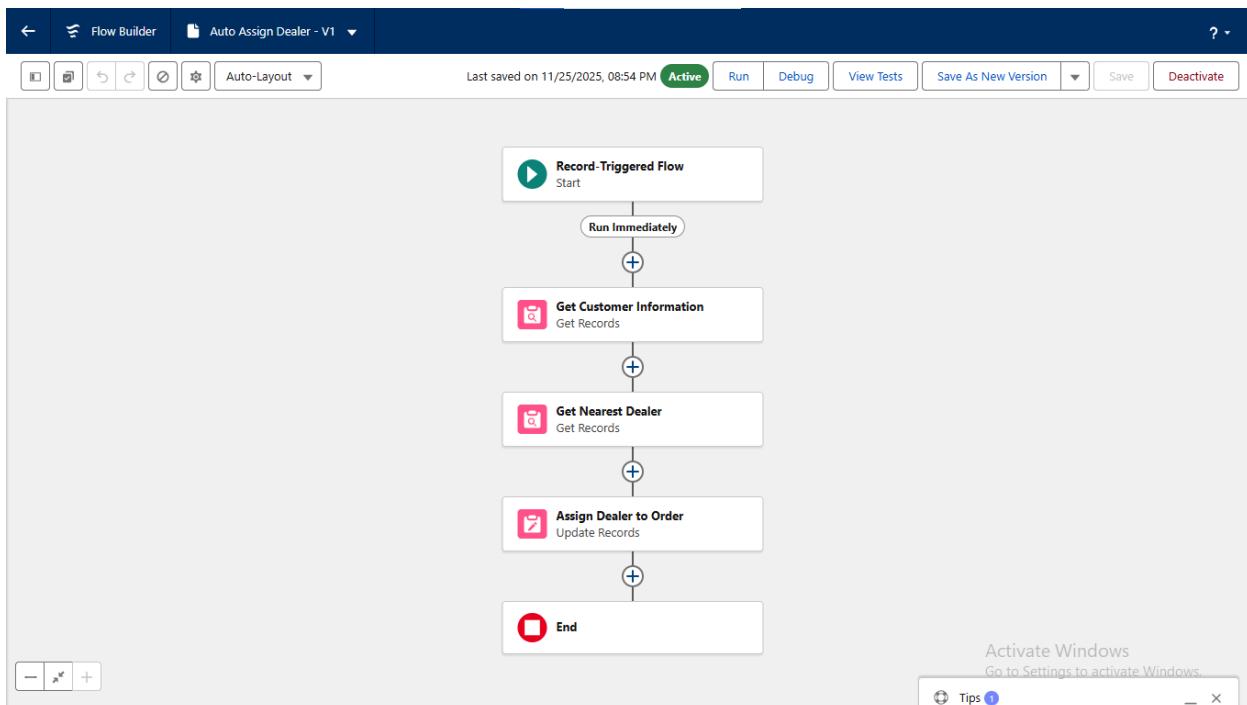
- **Custom Objects:** Vehicle, Vehicle Customer, Vehicle Dealer, Vehicle Order, Vehicle Service, Vehicle Test Drive
- **Validation Rules:** Prevent invalid booking dates and incomplete payments
- **Automation:** Salesforce Flows, Workflow Rules, Process Builder
- **Approval Process:** Purchase and financing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

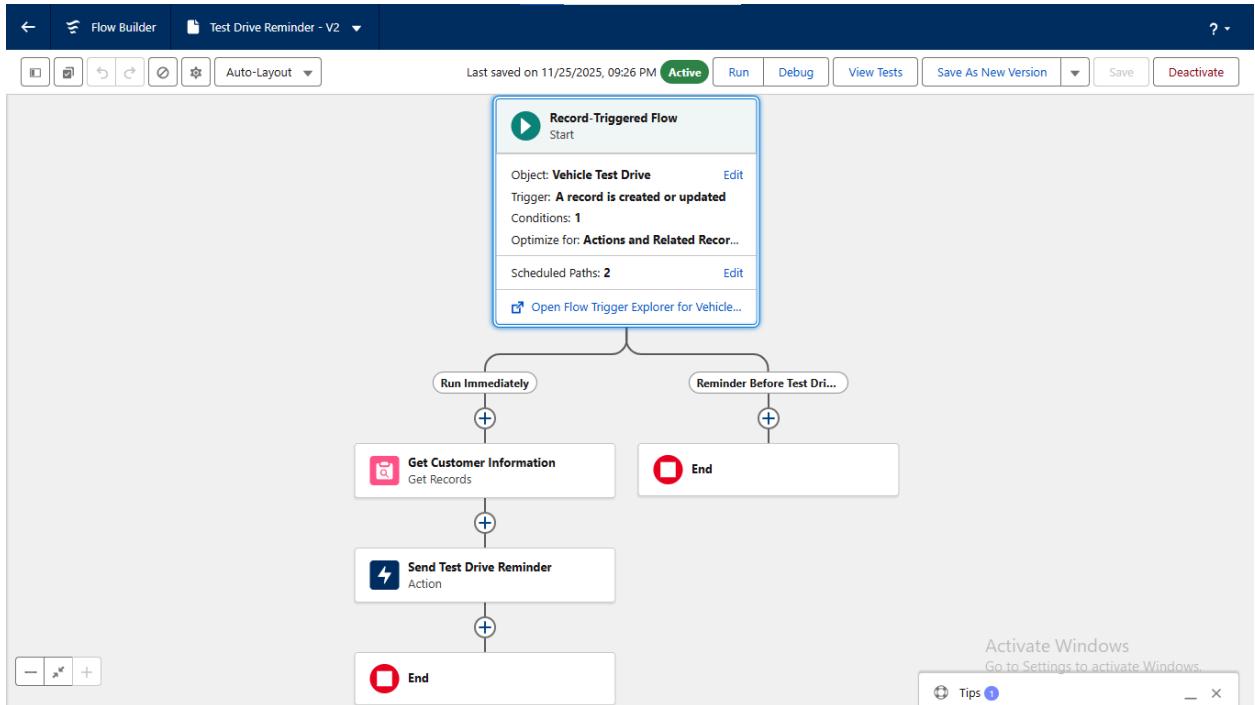
- **Apex Classes & Triggers:** VehicleOrderBatch, VehicleOrderBatchScheduler, VehicleOrderTrigger, VehicleOrderTriggerHandler



The screenshot shows the Salesforce Object Manager page. It lists 220 items, sorted by Label. The objects listed include Time Slot, User, User Presence, User Provisioning Request, Vehicle, Vehicle Customer, Vehicle Dealer, Vehicle Order, Vehicle Service Request, Vehicle Test Drive, Voice Call, and Waitlist. A red wavy line highlights the 'User Provisioning Request' and 'Vehicle Test Drive' entries.

Object Label	Object Name	Type	Last Modified	Action
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 Pages interface for the Vehicle Service Requests page. The top navigation bar includes Sales, Vehicle Service Requests (selected), Vehicle Test Drives, Vehicle Orders, Vehicle Customers, Vehicle Dealers, Vehicles, Home, Opportunities, and More. A search bar and various quick action buttons are also present. The main content area displays a list of vehicle service requests, with one item named "Eme" listed. The bottom right corner features an "Activate Windows" watermark.

This screenshot shows the Lightning Pages interface for the Vehicle Test Drives page. The top navigation bar is identical to the previous screenshot. The main content area displays a list of vehicle test drives, with one item named "hihi" listed. The bottom right corner features an "Activate Windows" watermark.

Sales   Vehicle Service Requests   Vehicle Test Drives   **Vehicle Orders**   Vehicle Customers   Vehicle Dealers   Vehicles   Home   Opportunities   More

Vehicle Orders

Recently Viewed

1 item • Updated a few seconds ago

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

Search this list...

To Do List

Activate Windows  
Go to Settings to activate Windows.

Sales   Vehicle Service Requests   Vehicle Test Drives   Vehicle Orders   **Vehicle Customers**   Vehicle Dealers   Vehicles   Home   Opportunities   More

Vehicle Customers

Recently Viewed

2 items • Updated a few seconds ago

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

Search this list...

To Do List

Activate Windows  
Go to Settings to activate Windows.

Vehicle Dealers

Recently Viewed ▾

2 items • Updated a few seconds ago

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

New Import Change Owner Assign Label

Search this list...

Activate Windows  
Go to Settings to activate Windows.

Vehicles

Recently Viewed ▾

2 items • Updated a few seconds ago

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

New Import Change Owner Assign Label

Search this list...

Activate Windows  
Go to Settings to activate Windows.

## Phase 4: Data Migration, Testing & Security

### Data Migration

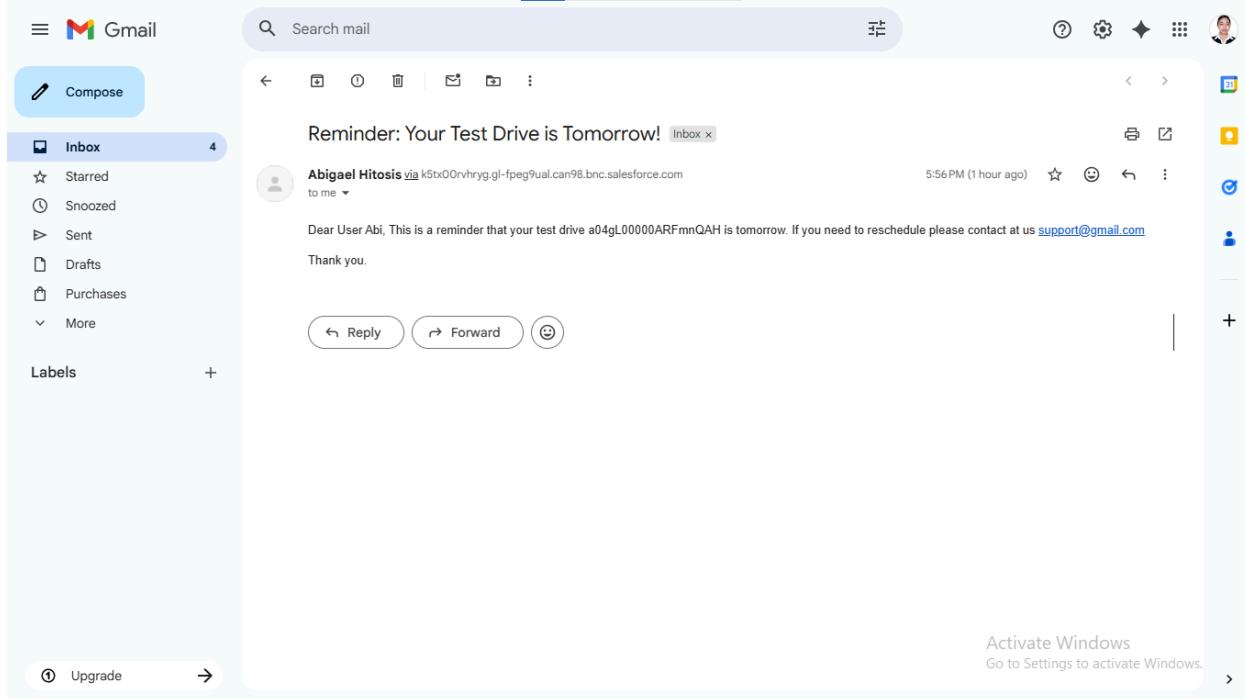
- Data Import Wizard for Customers and Vehicles
- Data Loader for Bookings and Payments

## 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.