

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

Project Overview

WhatNext Vision Motors aims to improve customer satisfaction by streamlining the vehicle ordering process with a Salesforce CRM solution. The CRM updates order status according to stock availability, prevents orders for vehicles that are out of stock, and automatically assigns dealers depending on customer location. Through automation, Apex triggers, and batch operations, the system enhances order accuracy, customer satisfaction, and internal operational efficiency.

Objectives

The main objective of the CRM is to modernize and automate the customer ordering workflow. It ensures customers can only order available vehicles, automatically assigns the nearest dealer, schedules notifications for test drives, and keeps order records updated. Overall, the CRM supports better decision-making, minimizes manual tasks, and enhances the company's service delivery.

Phase 1: Requirement Analysis & Planning

Understanding Business Requirements

- A more efficient purchasing procedure is required.
- The closest dealer must be automatically assigned to customers.
- Avoid placing orders for vehicles that aren't available.
- Automate stock availability and order status updates.

Defining Project Scope & Objectives

- Create custom objects for Dealers, Orders, Test Drives, and Vehicles.
- Use Flows, Apex triggers, and Scheduled Apex to automate process.
- To ensure order accuracy, incorporate stock-based validation.

Data Model & Security Model

- Objects used: Vehicle__c, Vehicle_Dealer__c, Vehicle_Customer__c, Vehicle_Order__c, Vehicle_Test_Drive__c, and Vehicle_Service_Request__c.
- Relationships: **Vehicle_Dealer__c** → **Vehicle__c**, **Vehicle_Customer__c** → **Vehicle_Order__c**, **Vehicle_Order__c** → **Vehicle__c**, and **Vehicle_Test_Drive__c** → **Vehicle_Customer__c** → **Vehicle__c**.

- Security: Profiles, Permission Sets, Role Hierarchy for controlled access.

Stakeholder Mapping

- Customers – order placement
- Dealers – vehicle allocation
- Admins – stock updates and workflow supervision
- Management – reports and dashboards

Execution Roadmap

1. Set up objects and fields
2. Build automations
3. Develop Apex triggers & batch classes
4. Configure UI pages
5. Test, deploy, and document

Phase 2: Salesforce Development - Backend & Configurations

Environment Setup

- Development done in **Dev Org**
- Configured Dev Org for building and testing custom objects

Customizations

- Custom Objects: **Vehicle__c, Vehicle_Dealer__c, Vehicle_Customer__c, Vehicle_Order__c, Vehicle_Test_Drive__c, Vehicle_Service_Request__c**
- Validation Rules: prevent ordering when stock = 0
- Flows: auto-assign nearest dealer to customer order

Setup Page

Setup

Home

Object Manager

Quick Find

Setup Home

Salesforce Go

Service Setup Assistant

Commerce Setup Assistant

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Sales Cloud Everywhere

ADMINISTRATION

Users

Data

Email

PLATFORM TOOLS

Subscription Management

Apps

Feature Settings

Search Setup

Star

Grid

Cloud

Help

Settings

Notifications

Profile

Welcome, Jalem Louise

Manage and customize Salesforce from Setup. Browse suggestions, explore features, and more.

Achieve Popular Business Goals

View All

Cross Cloud

Connect with Sales Prospects and Customers

Help sales reps prioritize and engage with customers.

Includes

- Sales Cloud Everywhere
- Agentforce (Default)
- Einstein Sales Emails

3 Completed1 In ProgressKeep Going

Cross Cloud

Track & Manage Customer Data

Collect, organize, and analyze customer data to drive insights, personalize experiences, and boost engagement.

Includes

- Case Management
- Feedback Management
- Einstein Activity Capture

2 Completed1 In ProgressKeep Going

Sales

Capture & Auto-Qualify Leads

Qualify and pass leads to reps and convert qualified leads quickly.

Customization of Objects, Fields, Validation Rules

Setup

Home

Object Manager

Search Setup

Star

Grid

Cloud

Help

Settings

Notifications

Profile

SETUP

Object Manager

6 Items, Sorted by Label

Search vehicleSchema BuilderCreate

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED	
Vehicle	Vehicle__c	Custom Object		11/26/2025	✓	
Vehicle Customer	Vehicle_Customer__c	Custom Object		11/26/2025	✓	
Vehicle Dealer	Vehicle_Dealer__c	Custom Object		11/26/2025	✓	
Vehicle Order	Vehicle_Order__c	Custom Object		11/26/2025	✓	
Vehicle Service Request	Vehicle_Service_Request__c	Custom Object		11/26/2025	✓	
Vehicle Test Drive	Vehicle_Test_Drive__c	Custom Object		11/26/2025	✓	

Setup

Home

Object Manager

Search Setup

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SETUP > OBJECT MANAGER

Vehicle

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

Fields & Relationships

9 Items, Sorted by Field Label

Q 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)		✓
Price	Price__c	Currency(18, 0)		<div>▼</div>
Status	Status__c	Picklist		<div>▼</div>
Stock Quantity	Stock_Quantity__c	Number(18, 0)		<div>▼</div>
Vehicle Dealer	Vehicle_Dealer__c	Lookup(Vehicle Dealer)		✓ <div>▼</div>
Vehicle Model	Vehicle_Model__c	Picklist		<div>▼</div>
Vehicle Name	Name	Text(80)		✓ <div>▼</div>

Setup

Home

Object Manager

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SETUP > OBJECT MANAGER

Vehicle Customer

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Buttons, Links, and Actions

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Restriction Rules

Scoping Rules

Fields & Relationships

8 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text(60)		<div>▼</div>
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		<div>▼</div>
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		<div>▼</div>
Preferred Vehicle Type	Preferred_Vehicle_Type__c	Picklist		<div>▼</div>
Vehicle Name	Name	Text(80)		✓ <div>▼</div>



Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Vehicle Dealer

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Buttons, Links, and Actions

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List View Button Layout

Restriction Rules

Scoping Rules

Fields & Relationships

8 Items, Sorted by Field Label

New

Deleted Fields

Field Dependencies

Set History Tracking

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)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		
Vehicle Dealer Name	Name	Text(80)		✓



Setup

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SETUP > OBJECT MANAGER

Vehicle Order

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Restriction Rules

Scoping Rules

Fields & Relationships

9 Items, Sorted by Field Label

New

Deleted Fields

Field Dependencies

Set History Tracking

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

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SETUP > OBJECT MANAGER

Vehicle Service Request

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

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Fields & Relationships

9 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Issue Description	Issue_Description__c	Text(60)		<div></div>
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Service Date	Service_Date__c	Date		<div></div>
Status	Status__c	Picklist		<div></div>
Vehicle	Vehicle__c	Lookup(Vehicle)		✓ <div></div>
Vehicle Customer	Vehicle_Customer__c	Lookup(Vehicle Customer)		✓ <div></div>
Vehicle Service Request Name	Name	Text(80)		✓ <div></div>

Setup

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SETUP > OBJECT MANAGER

Vehicle Test Drive

Details

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Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Fields & Relationships

8 Items, Sorted by Field Label

Q Quick Find

New

Deleted Fields

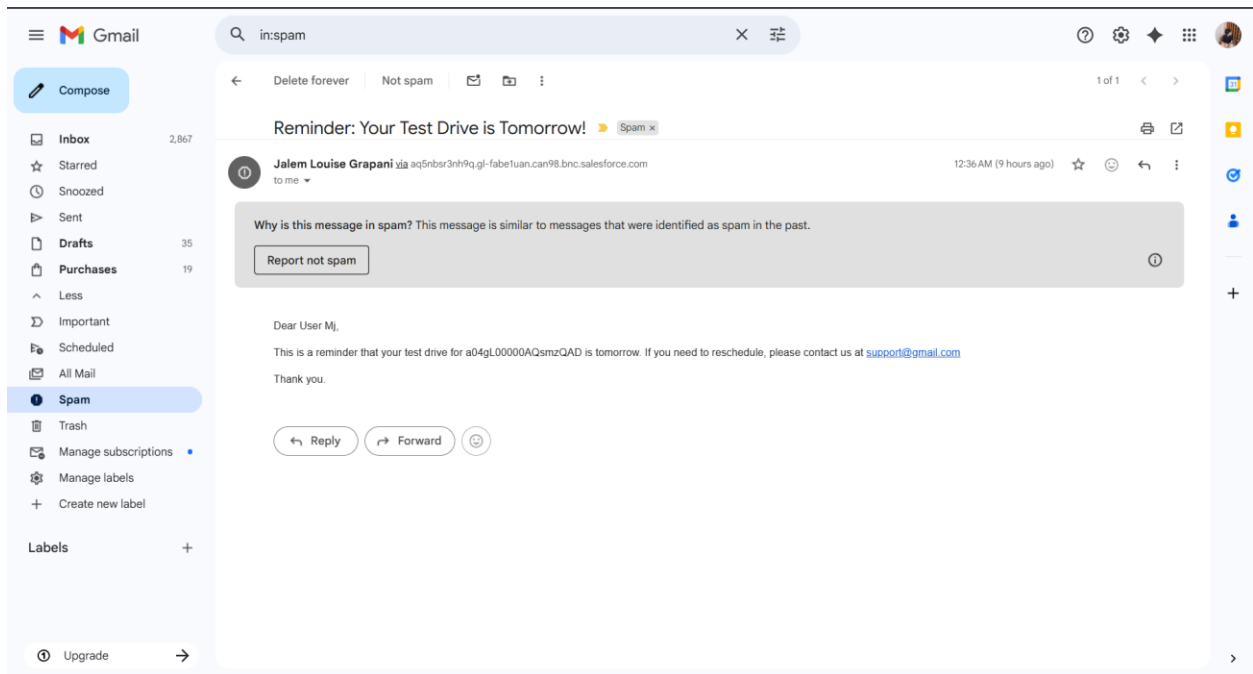
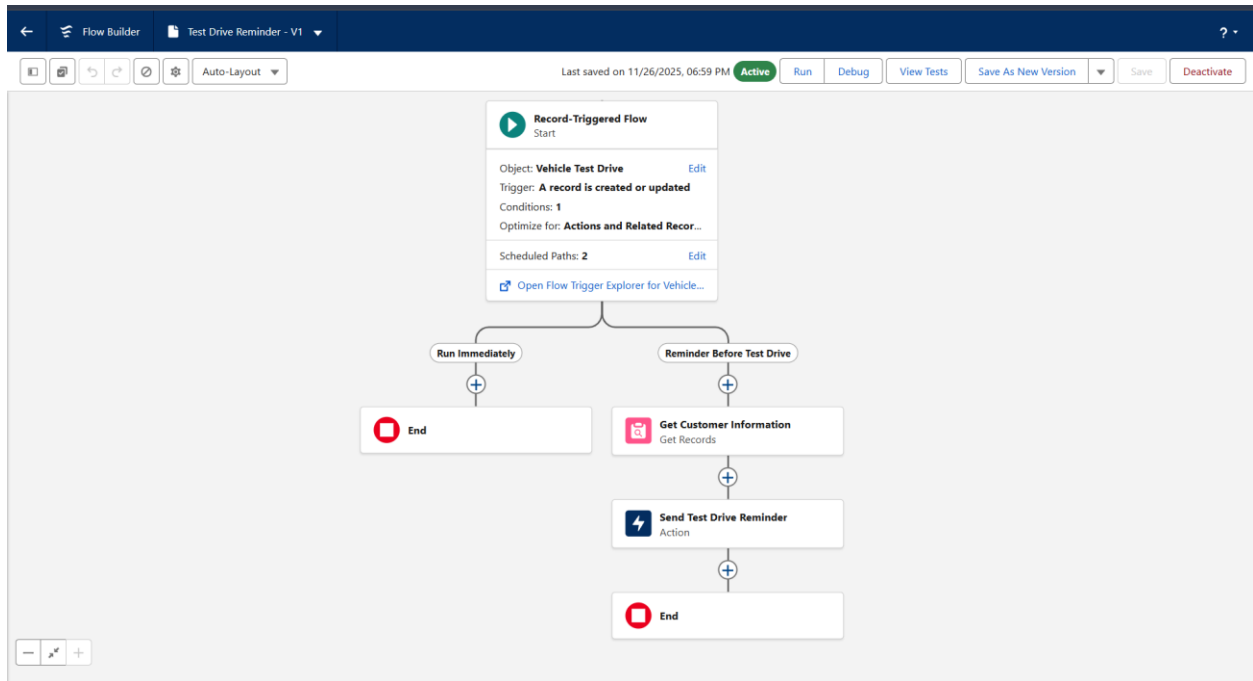
Field Dependencies

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		<div></div>
Test Drive Date	Test_Drive_Date__c	Date		<div></div>
Vehicle	Vehicle__c	Lookup(Vehicle)		✓ <div></div>
Vehicle Customer	Vehicle_Customer__c	Lookup(Vehicle Customer)		✓ <div></div>
Vehicle Test Drive Name	Name	Text(80)		✓ <div></div>

Automation

1. **Test Drive Reminder Flow** – Sends automated email reminders to customers for their scheduled test drives, improving customer engagement and reducing missed appointments.



2. Auto Assign Dealer Flow – Automatically assigns the nearest dealer to a customer's order based on the customer's address. This ensures orders are processed quickly and accurately without manual

Flow BuilderAuto Assign Dealer - V1

Last saved on 11/26/2025, 06:27 PMActiveRunDebugView TestsSave As New VersionSaveDeactivate

Record-Triggered FlowStart

Object: Vehicle OrderEdit

Trigger: A record is created

Conditions: 1

Optimize for: Actions and Related Recor...

+ Add Scheduled Paths (Optional)

Open Flow Trigger Explorer for Vehicle...

Run Immediately

+Get Customer InformationGet Records

+Get Nearest DealerGet Records

+Assign Dealer to OrderUpdate Records

+End

WhatNext Vision MotorsVehicle CustomersVehicle DealersVehicle OrdersVehicle Service RequestsVehicle Test DrivesVehiclesReportsDashboards

Vehicle OrderO-0001New ContactEditNew Opportunity

RelatedDetails

Vehicle Order NumberO-0001

Vehicle CustomerMark

VehicleHonda

Order Date11/29/2025

StatusPending

Assigned DealerJalem

Created ByJalem Louise Grapani11/26/2025, 2:34 AM

OwnerJalem Louise Grapani

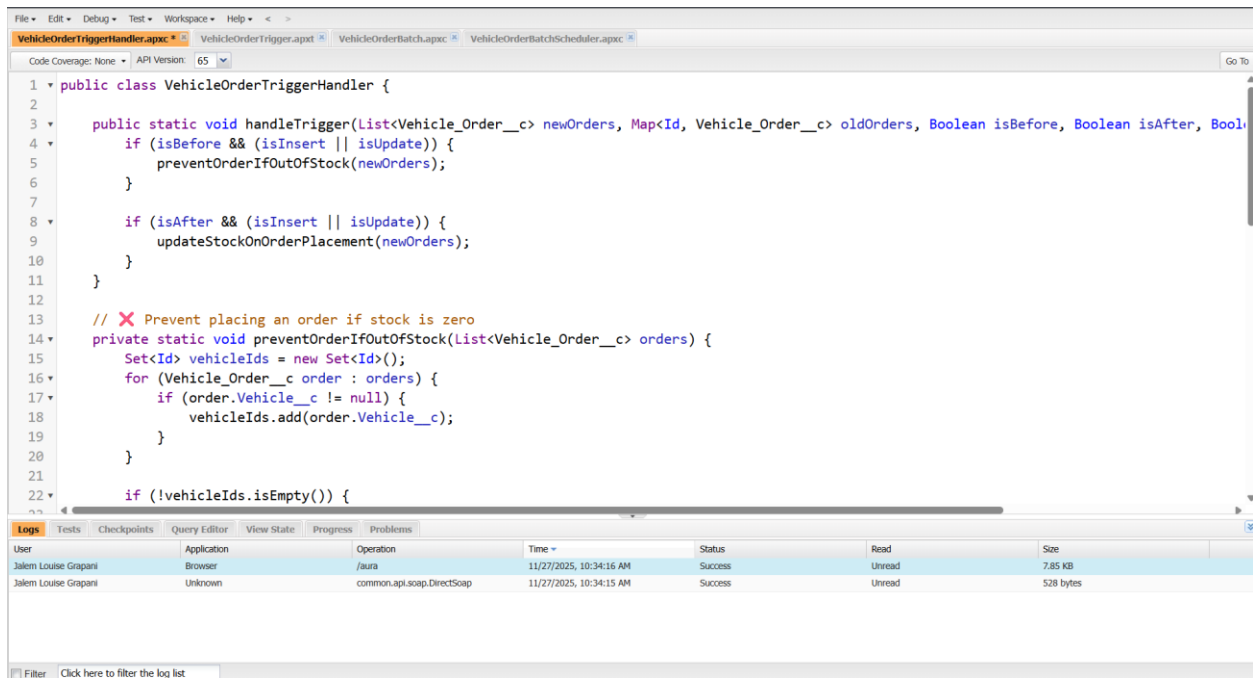
Last Modified ByJalem Louise Grapani11/26/2025, 2:34 AM

Apex Development

- Trigger for stock validation
- Trigger for dealer assignment
- Trigger handler for clean logic
- Batch Apex to update bulk order statuses
- Scheduled Apex for scheduled stock updates

The screenshot shows the 'New Vehicle Order' form in Salesforce. The form is titled 'New Vehicle Order' and has a tab labeled 'Information'. The form contains several fields: 'Vehicle Order Number', 'Vehicle Customer' (with a dropdown menu showing 'Mark'), 'Vehicle' (with a dropdown menu showing 'Honda'), 'Order Date' (with a date picker showing '11/27/2025'), 'Status' (with a dropdown menu showing 'Pending'), and 'Assigned Dealer' (with a search field). The 'Owner' field is populated with 'Jalem Louise Grapani'. A red error message box is displayed over the form, stating 'We hit a snag.' and 'Review the errors on this page.' with a bullet point: 'This vehicle is out of stock. Order cannot be placed.' The background shows the Salesforce interface with a sidebar on the left and a top navigation bar.

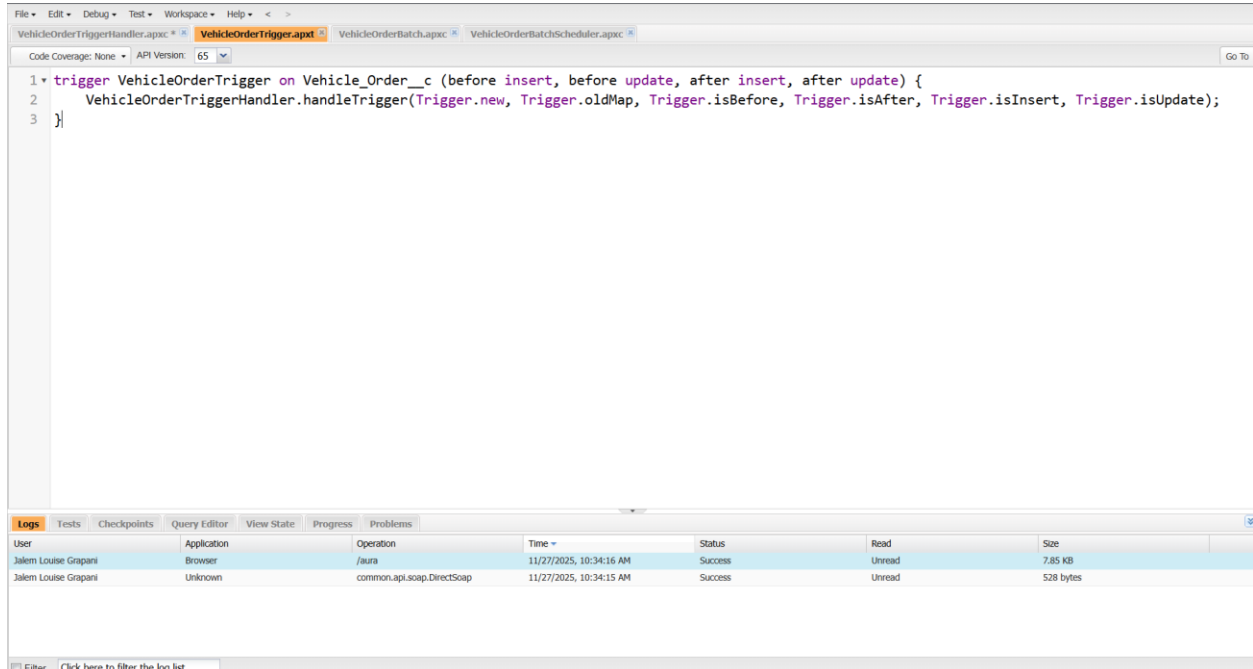
VehicleOrderTriggerHandler.apxc



```
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 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()) {
```

User	Application	Operation	Time	Status	Read	Size
Jalem Louise Grapani	Browser	/aura	11/27/2025, 10:34:16 AM	Success	Unread	7.85 KB
Jalem Louise Grapani	Unknown	common.api.soap.DirectSoap	11/27/2025, 10:34:15 AM	Success	Unread	528 bytes

VehicleOrderTrigger.apxt



```
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 }
```

User	Application	Operation	Time	Status	Read	Size
Jalem Louise Grapani	Browser	/aura	11/27/2025, 10:34:16 AM	Success	Unread	7.85 KB
Jalem Louise Grapani	Unknown	common.api.soap.DirectSoap	11/27/2025, 10:34:15 AM	Success	Unread	528 bytes

VehicleOrderBatch.apxc

The screenshot displays the Salesforce IDE interface. The top pane shows the code for the `VehicleOrderBatch` class, which implements the `Database.Batchable<sObject>` interface. The code includes a `start` method to query for pending orders and an `execute` method to process them in batches. The bottom pane shows the 'Logs' tab with two log entries.

```
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         }
24     }
25 }
```

User	Application	Operation	Time	Status	Read	Size
Jalem Louise Grapani	Browser	/aura	11/27/2025, 10:34:16 AM	Success	Unread	7.85 KB
Jalem Louise Grapani	Unknown	common.api.soap.DirectSoap	11/27/2025, 10:34:15 AM	Success	Unread	528 bytes

Filter Click here to filter the log list

VehicleOrderBatchScheduler.apxc

The screenshot displays the Salesforce IDE interface. The top pane shows the code for the `VehicleOrderBatchScheduler` class, which implements the `Schedulable` interface. The `execute` method creates a `VehicleOrderBatch` instance and calls `Database.executeBatch` with a batch size of 50. The bottom pane shows the 'Logs' tab with two log entries, identical to the ones in the first screenshot.

```
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 }
```

User	Application	Operation	Time	Status	Read	Size
Jalem Louise Grapani	Browser	/aura	11/27/2025, 10:34:16 AM	Success	Unread	7.85 KB
Jalem Louise Grapani	Unknown	common.api.soap.DirectSoap	11/27/2025, 10:34:15 AM	Success	Unread	528 bytes

Filter Click here to filter the log list

Phase 3 – UI/UX Development & Customization

Lightning App Setup

- Created "WhatNext Vision Motors" custom app
- Added tabs for **Vehicle__c**, **Vehicle_Dealer__c**, **Vehicle_Customer__c**, **Vehicle_Order__c**, **Vehicle_Test_Drive__c**, **Vehicle_Service_Request__c**


The screenshot shows the 'Vehicle Customers' page. At the top, there's a navigation bar with the app name 'WhatNext Vision Motors' and several tabs: 'Vehicle Customers' (selected), 'Vehicle Dealers', 'Vehicle Orders', 'Vehicle Service Requests', 'Vehicle Test Drives', 'Vehicles', 'Reports', and 'Dashboards'. Below the navigation bar, the page title is 'Vehicle Customers' with a 'Recently Viewed' section. There are buttons for 'New', 'Import', 'Change Owner', and 'Assign Label'. A search bar is present with the text 'Search this list...'. Below the search bar, there's a table with the following data:

	Vehicle Name ↑	
1	<input type="checkbox"/> Mark	⌵
2	<input type="checkbox"/> Mj	⌵
3	<input type="checkbox"/> Kurt	⌵








At the bottom left, there is a small black box with the text 'javascript:void(0)'.

The screenshot shows the 'Vehicle Dealers' page. At the top, there's a navigation bar with the app name 'WhatNext Vision Motors' and several tabs: 'Vehicle Customers', 'Vehicle Dealers' (selected), 'Vehicle Orders', 'Vehicle Service Requests', 'Vehicle Test Drives', 'Vehicles', 'Reports', and 'Dashboards'. Below the navigation bar, the page title is 'Vehicle Dealers' with a 'Recently Viewed' section. There are buttons for 'New', 'Import', 'Change Owner', and 'Assign Label'. A search bar is present with the text 'Search this list...'. Below the search bar, there's a table with the following data:









	Vehicle Dealer Name	
1	<input type="checkbox"/> Jalem	⌵
2	<input type="checkbox"/> Jojo	⌵





Q Search...



WhatNext Vision Motors

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









Vehicle Orders






Recently Viewed 


NewImportChange OwnerAssign Label

5 items • Updated a few seconds ago








Q Search this list...











	<input type="checkbox"/> Vehicle Order Number	
1	<input type="checkbox"/> O-0001	
2	<input type="checkbox"/> O-0005	
3	<input type="checkbox"/> O-0004	
4	<input type="checkbox"/> O-0003	
5	<input type="checkbox"/> O-0002	





Q Search...



WhatNext Vision Motors

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









Vehicle Service Requests



Recently Viewed 

NewImportChange OwnerAssign Label


2 items • Updated a few seconds ago

Q Search this list...










	<input type="checkbox"/> Vehicle Service Request Name	
1	<input type="checkbox"/> Request 2	
2	<input type="checkbox"/> Request 1	

https://orgfarm-5b68ed0998-dev-ed.develop.lightning.force.com/lightning/o/Vehicle_Service_Request__c/home



Q Search...



WhatNext Vision Motors

Vehicle Customers

Vehicle Dealers

Vehicle Orders


Vehicle Service Requests

Vehicle Test Drives

Vehicles

Reports

Dashboards










Vehicle Test Drives





Recently Viewed


New Import Change Owner Assign Label

3 items • Updated a few seconds ago








Q Search this list...



	Vehicle Test Drive Name	
1	<input type="checkbox"/> Test 3	
2	<input type="checkbox"/> Test 1	 
3	<input type="checkbox"/> Test 2	



Q Search...



WhatNext Vision Motors

Vehicle Customers

Vehicle Dealers

Vehicle Orders


Vehicle Service Requests

Vehicle Test Drives

Vehicles

Reports

Dashboards










Vehicles



Recently Viewed

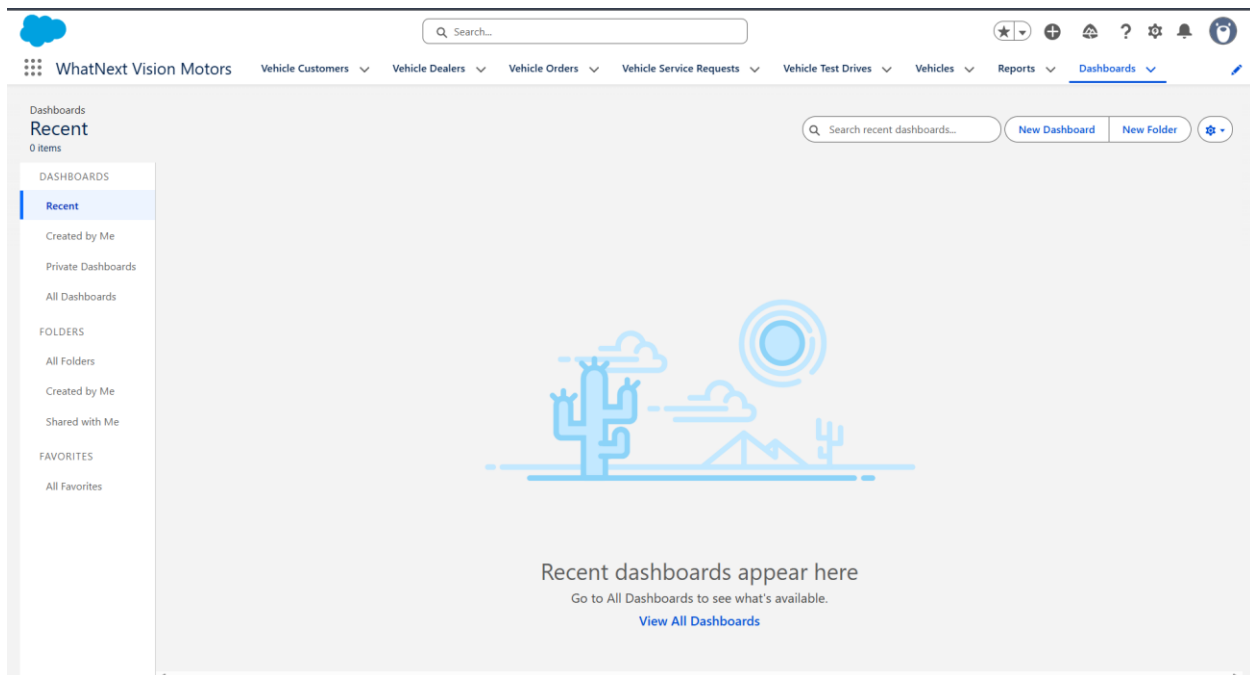
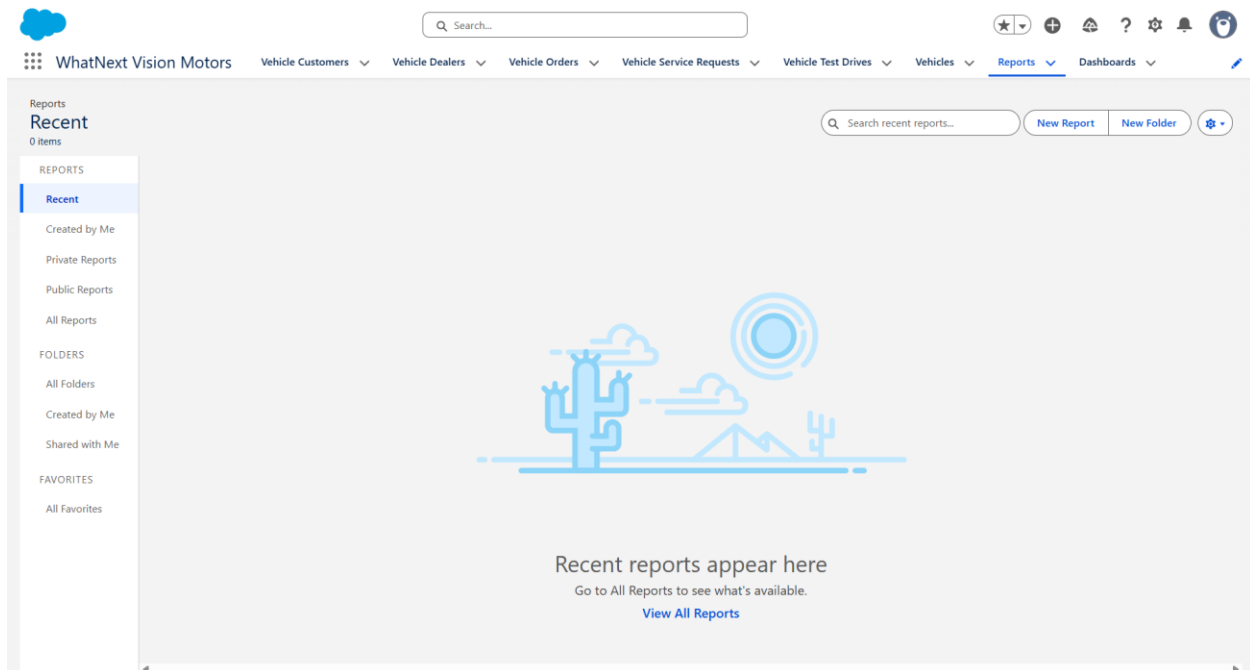
New Import Change Owner Assign Label

2 items • Updated a few seconds ago

Q Search this list...



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



Page Layouts & Dynamic Forms

- Simplified record view for users
- Dynamic fields for dealer assignment and stock availability

User Management

- Profiles for Admin, Dealer, Staff
- Permission sets for restricted access

Reports & Dashboards

- Vehicle Stock Report
- Dealer Assignment Analysis
- Order Status Dashboard

Phase 4 – Data Migration, Testing & Security

All custom objects (Vehicle__c, Vehicle_Dealer__c, Vehicle_Customer__c, Vehicle_Order__c, Vehicle_Test_Drive__c, Vehicle_Service_Request__c) were created manually in the Dev Org. Vehicle, Dealer, and Customer data were also added directly.


Security was enforced through Profiles, Roles, Permission Sets, Field History Tracking, and Duplicate Rules.

All automations, including stock validation triggers, dealer assignment flow, test drive reminder flow, and scheduled batch jobs, were tested to ensure proper functionality, with screenshots recorded for documentation.








Testing Process

The screenshot displays the Salesforce CRM interface for a 'Vehicle Customer' record. The top navigation bar includes the Salesforce logo, a search bar, and various utility icons. The main navigation menu shows 'WhatNext Vision Motors' with sub-menus for 'Vehicle Customers', 'Vehicle Dealers', 'Vehicle Orders', 'Vehicle Service Requests', 'Vehicle Test Drives', 'Vehicles', 'Reports', and 'Dashboards'. The record details for 'Vehicle Customer Mj' are shown, including fields for 'Vehicle Name', 'Email', 'Phone', 'Address', 'Preferred Vehicle Type', 'Created By', and 'Last Modified By'. The 'Owner' field is also visible, showing 'Jalem Louise Grapani'. The 'Created By' and 'Last Modified By' fields both show 'Jalem Louise Grapani' with a timestamp of '11/26/2025, 8:43 AM'.

Field	Value
Vehicle Name	Mj
Owner	Jalem Louise Grapani
Email	jalemlousegrapani@gmail.com
Phone	09876543212
Address	Laguna
Preferred Vehicle Type	Sedan
Created By	Jalem Louise Grapani - 11/26/2025, 8:43 AM
Last Modified By	Jalem Louise Grapani - 11/26/2025, 8:43 AM




Q Search...



WhatNext Vision MotorsVehicle CustomersVehicle DealersVehicle OrdersVehicle Service RequestsVehicle Test DrivesVehiclesReportsDashboards

Vehicle Dealer

Jalem

New ContactEditNew Opportunity

RelatedDetails

Vehicle Dealer Name

Jalem

Dealer Location

Laguna

Dealer Code

DC-0001


Phone

09765489076


Email

jj3123@gmail.com


Created By


 Jalem Louise Grapani · 11/26/2025, 1:52 AM

Owner








 Jalem Louise Grapani

Last Modified By

 Jalem Louise Grapani · 11/26/2025, 6:14 AM




Q Search...



WhatNext Vision MotorsVehicle CustomersVehicle DealersVehicle OrdersVehicle Service RequestsVehicle Test DrivesVehiclesReportsDashboards

Vehicle Order

O-0006

New ContactEditNew Opportunity

RelatedDetails

Vehicle Order Number

O-0006

Vehicle Customer

Mj

Vehicle

Toyota

Order Date

11/27/2025


Status

Pending


Assigned Dealer

Jalem


Created By

 Jalem Louise Grapani · 11/26/2025, 6:54 PM

Owner

 Jalem Louise Grapani

Last Modified By

 Jalem Louise Grapani · 11/26/2025, 6:54 PM



Vehicle Service Request
Request 2

New Contact Edit New Opportunity

Related Details

Vehicle Service Request Name	Owner
Request 2	Jalem Louise Grapani
Vehicle Customer	
Kurt	
Vehicle	
Honda	
Service Date	
11/27/2025	
Issue Description	
Maintenance	
Status	
Requested	
Created By	Last Modified By
Jalem Louise Grapani 11/26/2025, 8:04 AM	Jalem Louise Grapani 11/26/2025, 8:04 AM



Vehicle Test Drive
Test 3

New Contact Edit New Opportunity

Related Details

Vehicle Test Drive Name	Owner
Test 3	Jalem Louise Grapani
Vehicle Customer	
Mj	
Vehicle	
Toyota	
Test Drive Date	
11/28/2025	
Status	
Scheduled	
Created By	Last Modified By
Jalem Louise Grapani 11/26/2025, 8:43 AM	Jalem Louise Grapani 11/26/2025, 8:43 AM

WhatNext Vision Motors

Vehicle Customers

Vehicle Dealers

Vehicle Orders

Vehicle Service Requests

Vehicle Test Drives

Vehicles

Reports

Dashboards

Search...

★

+

🏠

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⚙️

🔔

👤

Vehicle

Honda

New Contact

Edit

New Opportunity

Related

Details

Vehicle Name

Honda

✎

Vehicle Model

EV

✎

Stock Quantity

0

✎

Price

\$80,000

✎

Vehicle Dealer

Jojo

✎

Status

Available

✎

Created By

Jalem Louise Grapani

11/26/2025, 1:55 AM

Owner

Jalem Louise Grapani

👤

Last Modified By

Jalem Louise Grapani

11/26/2025, 9:54 AM

Compose

Inbox2,867

Starred

Snoozed

Sent

Drafts35

Purchases19

Less

Important

Scheduled

All Mail

Spam

Trash

Manage subscriptions

Manage labels

Create new label

Labels

Upgrade

in:spam

Delete forever

Not spam

📧

📁

⋮

1 of 1

Reminder: Your Test Drive is Tomorrow!

Spam

Jalem Louise Grapani

xia aq5nbsr3nh9q.gi-fabeluan.can98.bnc.salesforce.com

to me

12:36 AM (10 hours ago)

☆

😊

↩

⋮

Why is this message in spam? This message is similar to messages that were identified as spam in the past.

Report not spam

Dear User Mj,

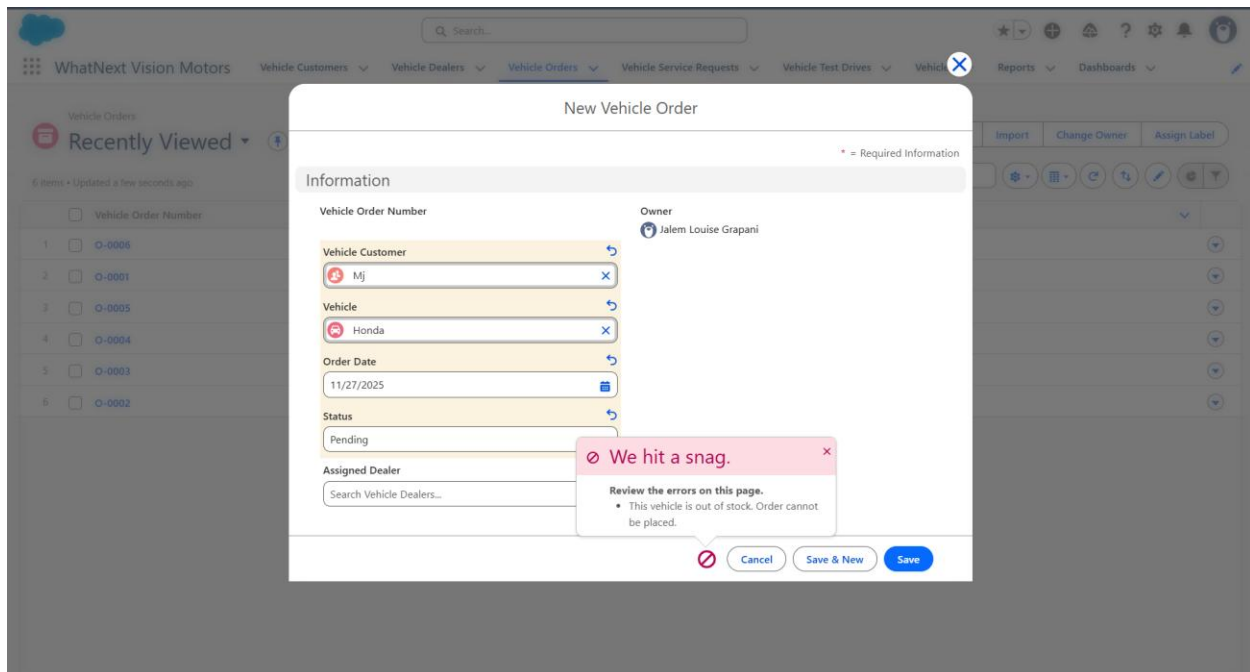
This is a reminder that your test drive for a04gI00000AQsmzQAD is tomorrow. If you need to reschedule, please contact us at support@gmail.com

Thank you.

↩ Reply

➡ Forward

😊



Phase 5 – Deployment, Documentation & Maintenance

All changes were tested directly in the Dev Org. The admin regularly monitors workflows, automations, and stock updates. Troubleshooting is managed using Apex Logs, Flow error notifications, and validation error checks to ensure smooth system operation.

Conclusion

The Salesforce CRM implementation for WhatNext Vision Motors successfully streamlines the vehicle ordering process by automating dealer assignment, validating stock before orders, and sending test drive reminders. Manual tasks are minimized, order accuracy is improved, and customer satisfaction is enhanced. The system also supports internal operational efficiency through the use of Apex triggers, Flows, and batch processes.