

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

The screenshot shows the Salesforce Setup page. At the top, there's a navigation bar with icons for Home, Object Manager, and a search bar labeled "Search Setup". Below the navigation is a sidebar with links like Setup Home, Salesforce Go, Service Setup Assistant, etc. The main content area features a "Welcome, Jalem Louise" message and a section titled "Achieve Popular Business Goals". This section includes three cards: "Connect with Sales Prospects and Customers" (Cross Cloud), "Track & Manage Customer Data" (Cross Cloud), and "Capture & Auto-Qualify Leads" (Sales). Each card has a progress indicator (e.g., 3 Completed, 1 In Progress) and a "Keep Going" button.

Customization of Objects, Fields, Validation Rules

The screenshot shows the Salesforce Object Manager page. The top navigation bar includes "SETUP", "Home", "Object Manager", and a search bar. A search bar at the top right contains the text "vehicle". The main content is a table titled "Object Manager" showing six items, sorted by Label. The columns are: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The data is as follows:

| 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 > OBJECT MANAGER

Vehicle

| Fields & Relationships | | Fields & Relationships | | | | |
|------------------------|--|--------------------------------|-------------------|------------------------|-------------------|---------|
| | | 9 Items, Sorted by Field Label | | | | |
| | | FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
| | | Created By | CreatedByld | Lookup(User) | | |
| | | Last Modified By | LastModifiedByld | Lookup(User) | | |
| | | Owner | OwnerId | Lookup(User,Group) | | ✓ |
| | | Price | Price__c | Currency(18, 0) | | |
| | | Status | Status_c__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) | | ✓ |

Setup > OBJECT MANAGER

Vehicle Customer

| Fields & Relationships | | Fields & Relationships | | | | |
|------------------------|--|--------------------------------|---------------------------|--------------------|-------------------|---------|
| | | 8 Items, Sorted by Field Label | | | | |
| | | FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
| | | Address | Address__c | Text(60) | | |
| | | Created By | CreatedByld | Lookup(User) | | |
| | | Email | Email__c | Email | | |
| | | Last Modified By | LastModifiedByld | Lookup(User) | | |
| | | Owner | OwnerId | Lookup(User,Group) | | ✓ |
| | | Phone | Phone__c | Phone | | |
| | | Preferred Vehicle Type | Preferred_Vehicle_Type__c | Picklist | | |
| | | Vehicle Name | Name | Text(80) | | ✓ |

Setup > OBJECT MANAGER

Vehicle Dealer

| Fields & Relationships | | Fields & Relationships | | | | |
|------------------------|--|--------------------------------|--------------------|--------------------|-------------------|---------|
| | | 8 Items, Sorted by Field Label | | | | |
| | | 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 > OBJECT MANAGER

Vehicle Order

| Fields & Relationships | | Fields & Relationships | | | | |
|------------------------|--|--------------------------------|---------------------|--------------------------|-------------------|---------|
| | | 9 Items, Sorted by Field Label | | | | |
| | | 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 > OBJECT MANAGER

Vehicle Service Request

| Fields & Relationships | | Fields & Relationships | | | | |
|------------------------|--|--------------------------------|----------------------|--------------------------|-------------------|---------|
| | | 9 Items, Sorted by Field Label | | | | |
| | | FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
| | | Created By | CreatedById | Lookup(User) | | |
| | | Issue Description | Issue_Description__c | Text(60) | | |
| | | Last Modified By | LastModifiedById | Lookup(User) | | |
| | | Owner | OwnerId | Lookup(User,Group) | | ✓ |
| | | Service Date | Service_Date__c | Date | | |
| | | Status | Status__c | Picklist | | |
| | | Vehicle | Vehicle__c | Lookup(Vehicle) | | ✓ |
| | | Vehicle Customer | Vehicle_Customer__c | Lookup(Vehicle Customer) | | ✓ |
| | | Vehicle Service Request Name | Name | Text(80) | | ✓ |

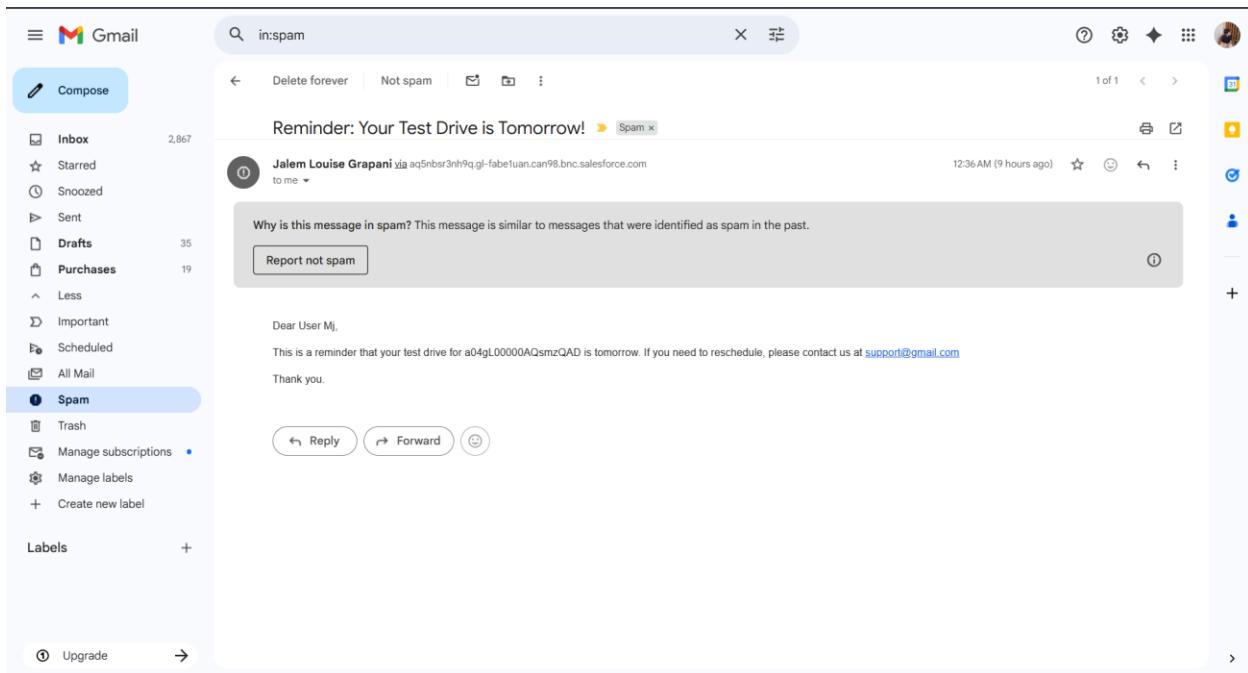
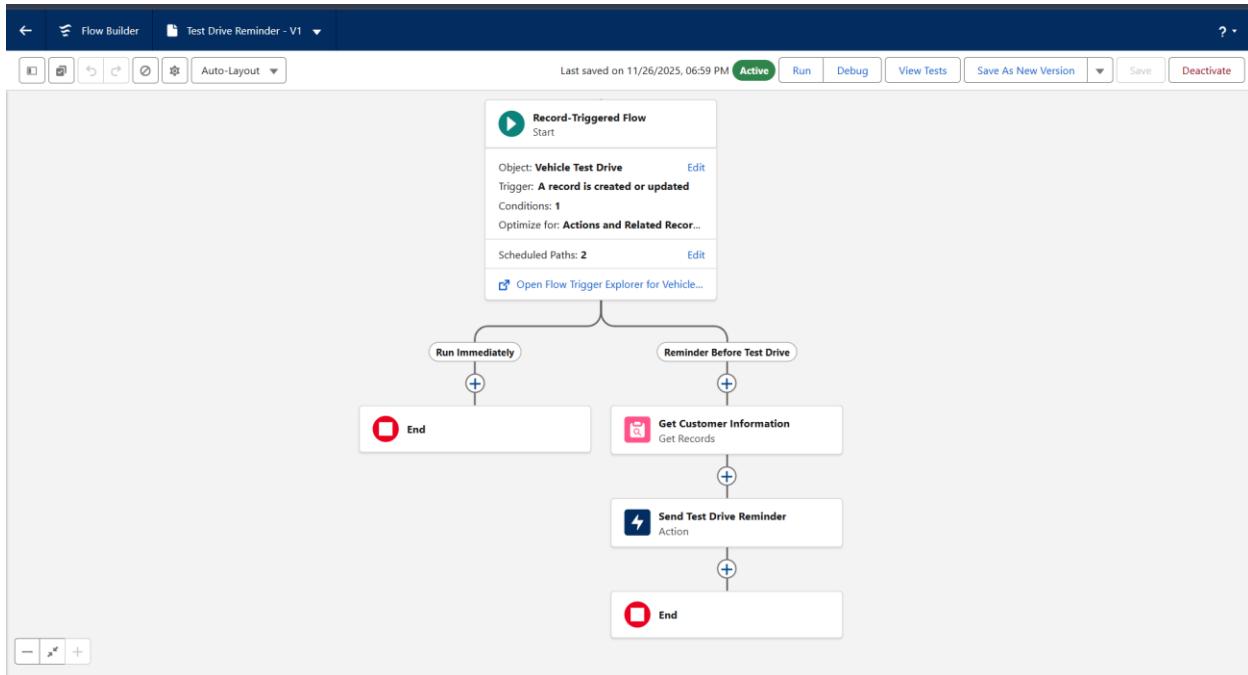
Setup > OBJECT MANAGER

Vehicle Test Drive

| Fields & Relationships | | Fields & Relationships | | | | |
|------------------------|--|--------------------------------|---------------------|--------------------------|-------------------|---------|
| | | 8 Items, Sorted by Field Label | | | | |
| | | 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) | | ✓ |

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

```

graph TD
    Start((Record-Triggered Flow Start)) --> RunImmediately([Run Immediately])
    RunImmediately --> GetCustomer[Get Customer Information]
    GetCustomer --> GetNearestDealer[Get Nearest Dealer]
    GetNearestDealer --> AssignDealer[Assign Dealer to Order]
    AssignDealer --> End([End])
  
```

The screenshot shows the Flow Builder interface with the following details:

- Flow Name:** Auto Assign Dealer - V1
- Last saved on:** 11/26/2025, 06:27 PM
- Status:** Active
- Actions:**
 - Run
 - Debug
 - View Tests
 - Save As New Version
 - Save
 - Deactivate
- Flow Steps:**
 - Start (Record-Triggered Flow)
 - Run Immediately
 - Get Customer Information (Get Records)
 - Get Nearest Dealer (Get Records)
 - Assign Dealer to Order (Update Records)
 - End

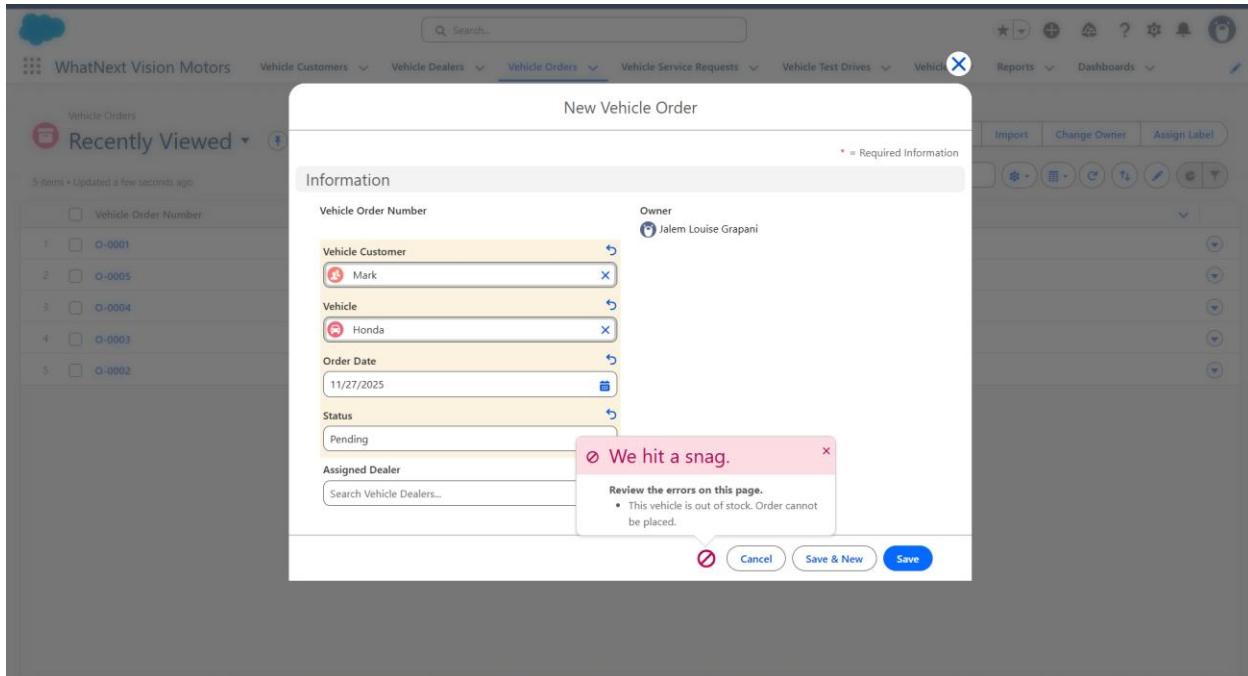
The screenshot shows the WhatNext Vision Motors application interface with the following details:

- Header:** WhatNext Vision Motors
- Navigation:** Vehicle Customers, Vehicle Dealers, Vehicle Orders (selected), Vehicle Service Requests, Vehicle Test Drives, Vehicles, Reports, Dashboards
- Selected Item:** Vehicle Order O-0001
- Details Tab:** Details (Active)

| | | | |
|----------------------|---|------------------|---|
| Vehicle Order Number | O-0001 | Owner | Jalem Louise Grapani |
| Vehicle Customer | Mark | | |
| Vehicle | Honda | | |
| Order Date | 11/29/2025 | | |
| Status | Pending | | |
| Assigned Dealer | Jalem | | |
| Created By | Jalem Louise Grapani, 11/26/2025, 2:34 AM | Last Modified By | Jalem Louise Grapani, 11/26/2025, 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



VehicleOrderTriggerhandler.apxc

The screenshot shows the Workbench IDE interface. The top navigation bar includes File, Edit, Debug, Test, Workspace, Help, and a Go To button. Below the navigation bar, tabs for VehicleOrderTriggerHandler.apxc, VehicleOrderTrigger.apxt, and VehicleOrderBatchScheduler.apxc are visible. The code editor displays the following Java-like code:

```
1 public class VehicleOrderTriggerHandler {  
2     public static void handleTrigger(List<Vehicle_Order__c> newOrders, Map<Id, Vehicle_Order__c> oldOrders, Boolean isBefore, Boolean isAfter, Boolean isInsert, Boolean isUpdate) {  
3         if (isBefore && (isInsert || isUpdate)) {  
4             preventOrderIfOutOfStock(newOrders);  
5         }  
6         if (isAfter && (isInsert || isUpdate)) {  
7             updateStockOnOrderPlacement(newOrders);  
8         }  
9     }  
10 }  
11  
12 // ✘ Prevent placing an order if stock is zero  
13 private static void preventOrderIfOutOfStock(List<Vehicle_Order__c> orders) {  
14     Set<Id> vehicleIds = new Set<Id>();  
15     for (Vehicle_Order__c order : orders) {  
16         if (order.Vehicle__c != null) {  
17             vehicleIds.add(order.Vehicle__c);  
18         }  
19     }  
20     if (!vehicleIds.isEmpty()) {  
21         // Logic to prevent order placement if stock is zero  
22     }  
23 }
```

Below the code editor is a log viewer with the following entries:

| 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 |

At the bottom of the log viewer is a filter bar with the placeholder "Click here to filter the log list".

VehicleOrderTrigger.apxt

The screenshot shows the Workbench IDE interface. The top navigation bar includes File, Edit, Debug, Test, Workspace, Help, and a Go To button. Below the navigation bar, tabs for VehicleOrderTriggerHandler.apxc, VehicleOrderTrigger.apxt, and VehicleOrderBatchScheduler.apxc are visible. The trigger definition in the code editor is:

```
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);  
}
```

Below the trigger definition is a log viewer with the following entries:

| 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 |

At the bottom of the log viewer is a filter bar with the placeholder "Click here to filter the log list".

VehicleOrderBatch.apxc

The screenshot shows the Force.com IDE interface with the VehicleOrderBatch.apxc file open. The code implements a Database.Batchable<sObject> interface. It starts by querying pending vehicle orders, then adds their vehicle IDs to a set. If there are vehicle IDs, it queries vehicle stock and creates a list of orders to update. A log table at the bottom shows two entries from Jalem Louise Grapani.

```
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 shows the Force.com IDE interface with the VehicleOrderBatchScheduler.apxc file open. The code implements a Schedulable interface, executing a batch job with a size of 50. A log table at the bottom shows two entries from Jalem Louise Grapani.

```
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 image displays two screenshots of the WhatNext Vision Motors custom app interface, illustrating the Lightning App Setup.

Vehicle Customers Tab:

- Header:** WhatNext Vision Motors, Vehicle Customers (selected), Vehicle Dealers, Vehicle Orders, Vehicle Service Requests, Vehicle Test Drives, Vehicles, Reports, Dashboards.
- Recent Viewed:** Recently Viewed (Mark, MJ, Kurt).
- Search Bar:** Search... (New, Import, Change Owner, Assign Label).
- List View:** Vehicle Name (Mark, MJ, Kurt).

Vehicle Dealers Tab:

- Header:** WhatNext Vision Motors, Vehicle Customers, Vehicle Dealers (selected), Vehicle Orders, Vehicle Service Requests, Vehicle Test Drives, Vehicles, Reports, Dashboards.
- Recent Viewed:** Recently Viewed (Jalem, Jojo).
- Search Bar:** Search... (New, Import, Change Owner, Assign Label).
- List View:** Vehicle Dealer Name (Jalem, Jojo).

Vehicle Orders

Recently Viewed ▾

5 items • Updated a few seconds ago

| | Vehicle Order Number | Actions |
|---|----------------------|---------|
| 1 | O-0001 | ⋮ |
| 2 | O-0005 | ⋮ |
| 3 | O-0004 | ⋮ |
| 4 | O-0003 | ⋮ |
| 5 | O-0002 | ⋮ |

Vehicle Service Requests

Recently Viewed ▾

2 items • Updated a few seconds ago

| | Vehicle Service Request Name | Actions |
|---|------------------------------|---------|
| 1 | Request 2 | ⋮ |
| 2 | Request 1 | ⋮ |

https://orgfarm-5b60ed8098-dev-ed.develop.lightning.force.com/lightning/o/Vehicle_Service_Request__c/home

Vehicle Test Drives

Recently Viewed ▾

3 items • Updated a few seconds ago

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

New Import Change Owner Assign Label

Search this list...

Vehicle Test Drives Vehicles Reports Dashboards

Vehicles

Recently Viewed ▾

2 items • Updated a few seconds ago

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

New Import Change Owner Assign Label

Search this list...

Vehicle Test Drives Vehicles Reports Dashboards

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

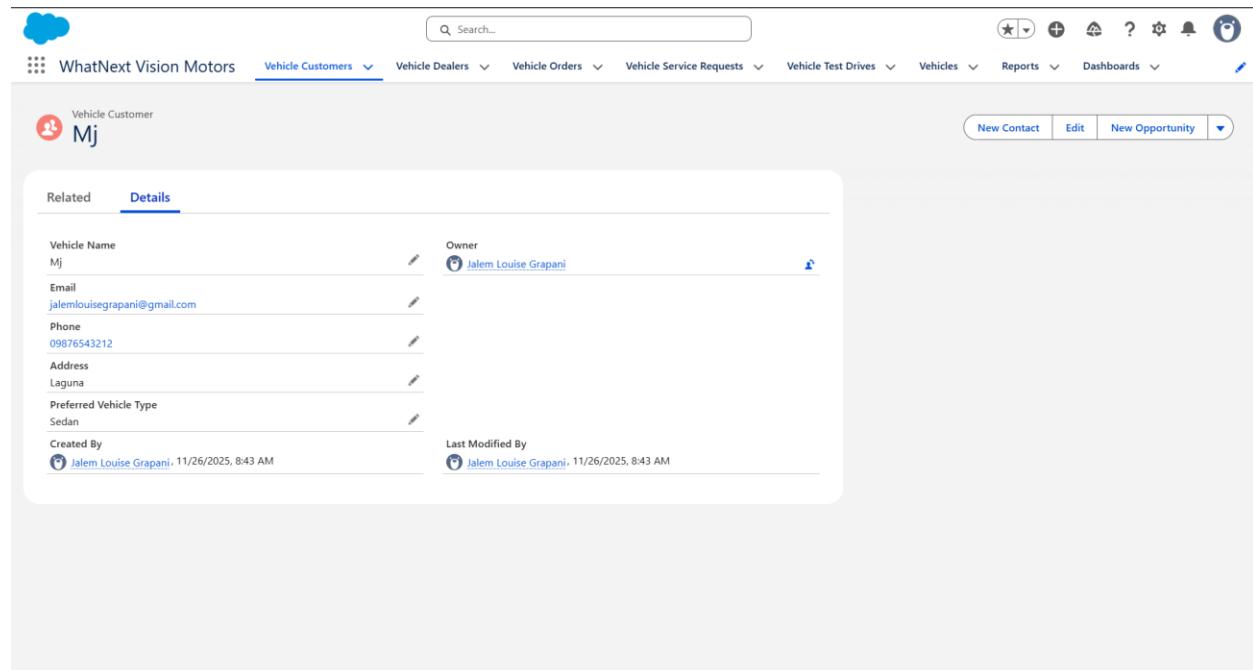
Phase 4 – Data Migration, Testing & Security

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 shows a Salesforce Lightning Experience page for a vehicle customer named 'Mj'. The page has a header with the organization name 'WhatNext Vision Motors' and navigation links for Vehicle Customers, Vehicle Dealers, Vehicle Orders, Vehicle Service Requests, Vehicle Test Drives, Vehicles, Reports, and Dashboards. The main content area displays the 'Details' tab for the 'Vehicle Customer' record. The record contains the following fields:

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

Below the details, there are tabs for 'Related' and 'New Contact', and buttons for 'Edit' and 'New Opportunity'.



WhatNext Vision Motors

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

Vehicle Dealer
Jalem

[New Contact](#) [Edit](#) [New Opportunity](#)

| Related | Details |
|--|--|
| Vehicle Dealer Name Jalem | Owner Jalem Louise Grapani |
| Dealer Location Laguna | |
| Dealer Code DC-0001 | |
| Phone 09765489076 | |
| Email jB123@gmail.com | |
| Created By Jalem Louise Grapani , 11/26/2025, 1:52 AM | Last Modified By Jalem Louise Grapani , 11/26/2025, 6:14 AM |



WhatNext Vision Motors

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

Vehicle Order
O-0006

[New Contact](#) [Edit](#) [New Opportunity](#)

| Related | Details |
|--|--|
| Vehicle Order Number O-0006 | Owner Jalem Louise Grapani |
| 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 | Last Modified By Jalem Louise Grapani , 11/26/2025, 6:54 PM |

WhatNext Vision Motors

Vehicle Service Requests

Vehicle Service Request Request 2

Related Details

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

WhatNext Vision Motors

Vehicle Test Drives

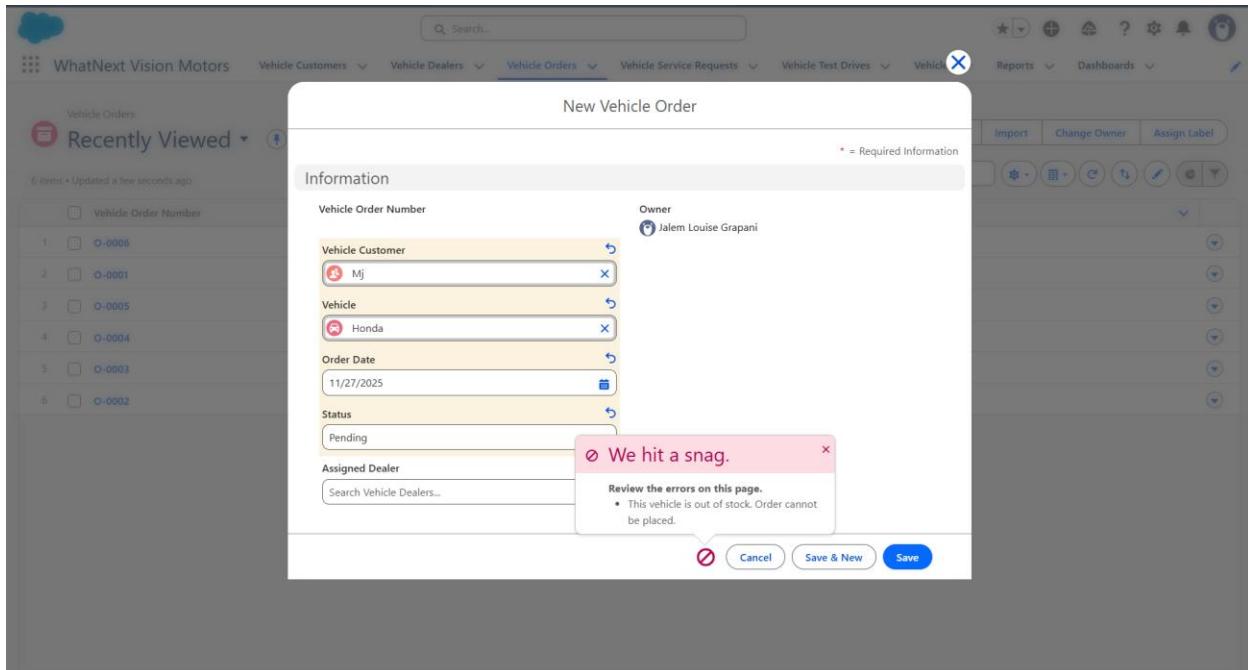
Vehicle Test Drive Test 3

Related Details

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

The screenshot shows a CRM application interface for 'WhatNext Vision Motors'. The top navigation bar includes links for Vehicle Customers, Vehicle Dealers, Vehicle Orders, Vehicle Service Requests, Vehicle Test Drives, Vehicles (selected), Reports, and Dashboards. A search bar and various system icons are also present. The main content area displays a vehicle record for a 'Honda' (EV model, Stock Quantity 0, Price \$80,000). The vehicle is owned by 'Jalem Louise Grapani'. The record includes tabs for 'Related' and 'Details', with the 'Details' tab selected. The details section contains fields for Vehicle Name, Model, Stock Quantity, Price, Vehicle Dealer (Jojo), Status (Available), and Created By (Jalem Louise Grapani). The last modified information is also shown.

The screenshot shows a Gmail inbox with a search filter applied for 'in:spam'. The search bar shows 'in:spam'. The inbox list includes a single message from 'Jalem Louise Grapani' with the subject 'Reminder: Your Test Drive is Tomorrow!'. The message is marked as spam. A tooltip explains why it was identified as spam: 'Why is this message in spam? This message is similar to messages that were identified as spam in the past.' Below the message, there is a note: 'Dear User Mj, This is a reminder that your test drive for a04gL0000AQsmzQAD is tomorrow. If you need to reschedule, please contact us at support@gmail.com Thank you.' At the bottom of the message, there are standard Gmail interaction buttons for Reply, Forward, and Report not spam.



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.