

Salesforce CRM Project Documentation

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

Project Overview

The WhatNext Vision Motors Salesforce CRM is designed to modernize and aims to streamline automotive sales, dealer assignment, and customer engagement processes. This serves as a centralized platform to manage vehicle inventory, customer orders, dealer management, test drives, and also other service related activities.

This project mainly focuses on improving the customer ordering process by validating vehicle stock availability, automatically assigning the nearest dealer based on customer location, and providing real-time visibility into their order status. By using Salesforce automation and Apex capabilities, the system ensures accuracy, efficiency, and scalability across business operations.

Key Features:

- Centralized vehicle, dealer, and customer management.
- Stock-availability checking vehicle order process.
- Automatic nearest dealer assignment
- Order status automation using batch and scheduled processes.
- Test drive reminder via email.
- Reports and dashboards for operational insights.

Objectives

The primary objective of this CRM implementation is to enhance customer experience while improving operational efficiency at WhatNext Vision Motors. The CRM aims to eliminate manual intervention in order processing, prevent customer dissatisfaction caused by stock unavailability, and ensure faster dealer coordination.

From a business perspective, the solution delivers value by improving order accuracy, reducing administrative effort, enabling better decision-making through reporting, and strengthening customer satisfaction and loyalty.

Understanding Business Requirements

The following business challenges were identified:

- Customers placing orders for vehicles that are out of stock
- Manual dealer assignment leading to delays and errors
- Lack of automated order status updates
- Inefficient test drive follow-up process
- Limited visibility into inventory and order fulfillment

The CRM solution addresses these challenges through automation, validation rules, and scheduled processes.

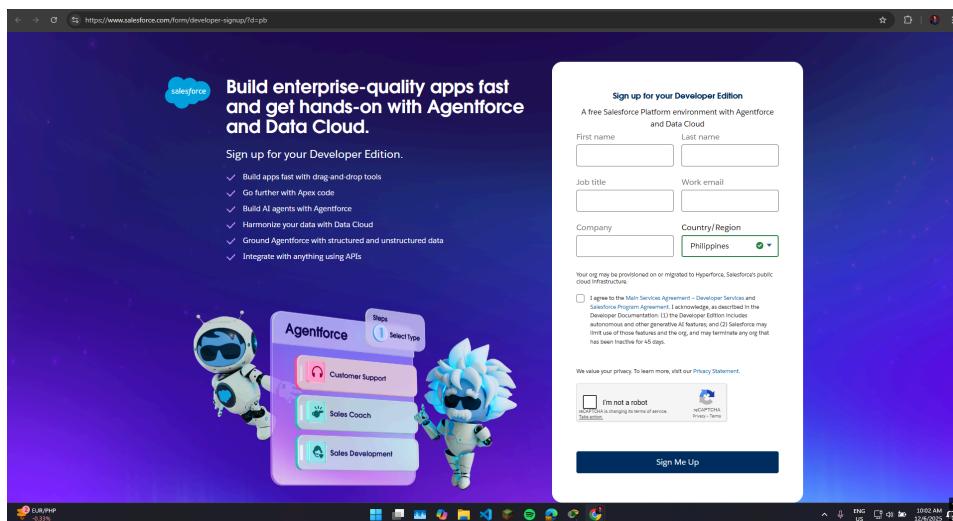
Defining Project Scope and Goals

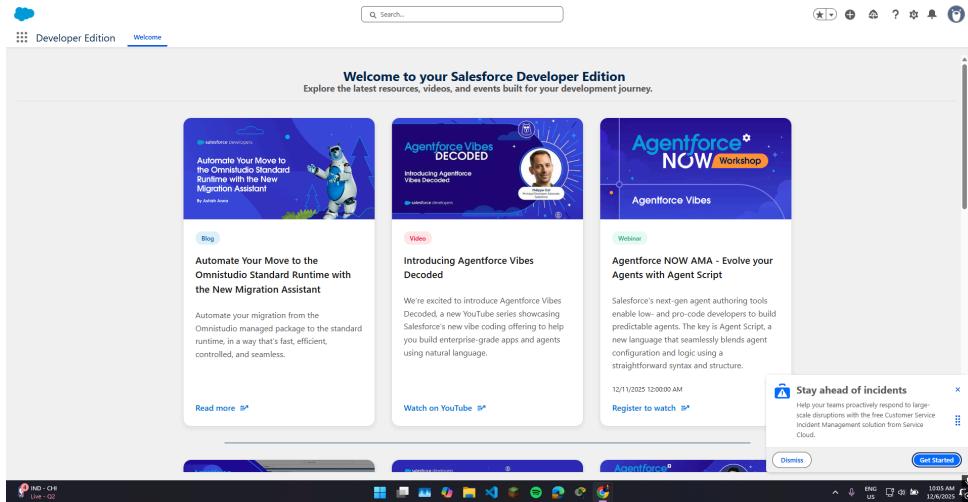
The project scope included the creation of a salesforce CRM to streamline the operation for WhatNext Vision Motors. The project included the following requirements:

- Vehicle inventory management
- Customer order management
- Dealer assignment automation
- Test drive scheduling and reminders
- Order status automation using batch jobs
- Reports and dashboards

Execution of Project Phases

1. Developer Org Setup





2. Custom Object Creation

Key objects used in the system include:

- **Vehicle__c** – Stores vehicle details and stock quantity
- **Vehicle_Dealer__c** – Stores dealer details and geolocation
- **Vehicle_Order__c** – Manages customer orders and order status
- **Vehicle_Customer__c** – Stores customer information
- **Vehicle_Test_Drive__c** – Manages test drive appointments
- **Vehicle_Service_Request__c** - Logs service request

The screenshot shows the Salesforce Setup interface with the following details:

Setup > OBJECT MANAGER

Vehicle Service Request

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

Help Settings: Standard salesforce.com Help Window

Buttons, Links, and Actions

Fields & Relationships

Page Layouts

Lightning Record Pages

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

Edit | **Delete**

System tray icons include: USD/PHP -0.52%, ENG US, 10:24 AM, 12/6/2025.

3. Custom Tab Creation

The screenshot shows the Salesforce Setup interface with the following details:

Setup > Tabs

New Custom Object Tab

Step 1. Enter the Details

Choose the custom object for this new custom tab. Fill in other details.

New Custom Object Tab

Select an existing custom object or **create a new custom object now**.

Object: None

Tab Style: None

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: None

Enter a short description.

Description: (Empty text input field)

Next | **Cancel**

System tray icons include: 27°C Mostly sunny, ENG US, 10:28 AM, 12/6/2025.

https://orgfarm-2b342f520b-dev-ed.develop.my.salesforce.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fu%2Fcustomtabs.jsp%3Fsetupid%3DCustomTabz%26retURL%3D%252Fsetup%252Fhome%26appLayout%3Dsetup%26...

Setup Home Object Manager

Search Setup

User interface

Rename Tabs and Labels

Tabs

Didnt find what you're looking for? Try using Global Search.

Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality. Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Help for this Page

Custom Object Tabs

Action	Label	Tab Style	Description
Edit Del	Vehicle Customers	People	
Edit Del	Vehicle Dealers	Building	
Edit Del	Vehicle Orders	Box	
Edit Del	Vehicle	Car	
Edit Del	Vehicle Service Requests	Form	
Edit Del	Vehicle Test Drives	Gears	

Web Tabs

No Web Tabs have been defined

Visualforce Tabs

No Visualforce Tabs have been defined

Lightning Component Tabs

Action	Label	Tab Style	Description
Edit	Get Started with Appforce	Heart	
Edit	Get Started with Data Cloud	Map	
Edit	Get Started with MuleSoft	Heart	
Edit	Get Started with Salesforce DX	Building Block	
...		Gears	

27°C Mostly sunny

ENG US 10:31 AM 32/6/2023

4.Creating the Lightning App

The screenshot shows the "New Lightning App" setup page. In the "App Details" section, the "App Name" is set to "WhatNext Vision Motors" and the "Developer Name" is "WhatNext_Vision_Motors". The "Description" field contains the text: "A automotive operations app using smart order management, automated dealer assignment, and real-time stock visibility." In the "App Branding" section, there is a placeholder for an "Image" and a "Primary Color Hex" value set to "#007002". Below these, there is an "Org Theme Options" section with a checkbox for "Use the app's image and color instead of the org's custom theme". The "App Launcher Preview" shows a card with the app's name and a brief description. A progress bar at the bottom indicates the setup is at step 1 of 4.

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

*App Name *Developer Name

Description

App Branding

Image Primary Color Hex Value

Org Theme Options Use the app's image and color instead of the org's custom theme

App Launcher Preview

WhatNext Vision Motors
A automotive operations app using smart order management, automated dealer assignment, and real-time stock visibility.

Next

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

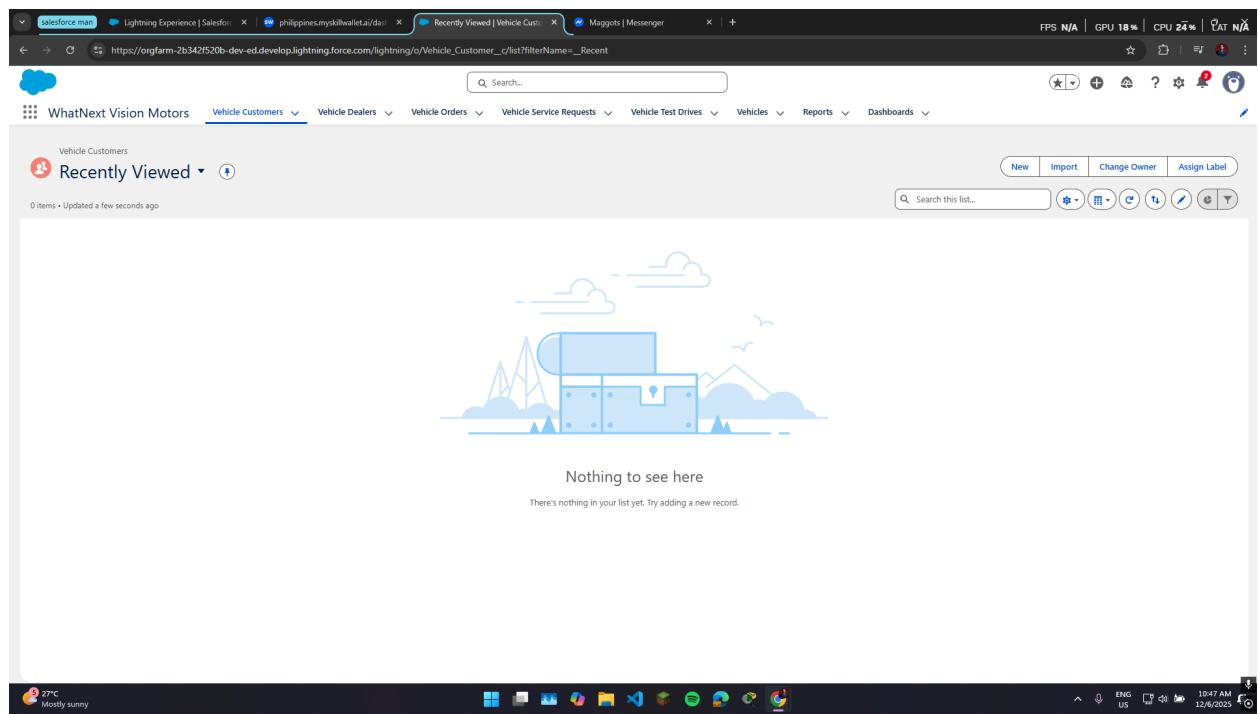
Vehicle Customers
Vehicle Dealers
Vehicle Orders
Vehicle Service Requests
Vehicle Test Drives
Vehicles

Selected Items

No items selected

Back Next

18 Queue Management QueueManagement Create and manage queues for your business. 11/26/2025, 6:37 PM Lightning ✓
19 Sales Sales The world's most popular sales force automation (SFA) solution. 11/26/2025, 6:37 PM Classic ✓
20 Sales LightningSales Manage your sales process with accounts, leads, opportunities, and more. 11/26/2025, 6:37 PM Lightning ✓
21 Sales Cloud Mobile SalesCloudMobile New seller focused mobile first experience. 11/26/2025, 6:37 PM Lightning ✓



5. Object Field Creation

The screenshot shows the Salesforce Setup interface for creating a new custom field. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, Buttons, Links, Actions, etc. The main content area is titled 'Vehicle New Custom Field' under 'Step 1. Choose the field type'. It asks to specify the type of information the custom field will contain. Under 'Data Type', 'None Selected' is chosen, with a note to select one of the data types below. The available options include:

- Auto Number**: A system-generated sequence number.
- Formula**: A read-only field derived from a formula expression.
- Roll-Up Summary**: A read-only field displaying the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship**: Creates a relationship linking the object to another object.
- Master-Detail Relationship**: Similar to Lookup, but the relationship field is required on all detail records.
- External Lookup Relationship**: Links the object to an external object whose data is stored outside the Salesforce org.
- Checkbox**: Allows users to select True or False.
- Currency**: Allows users to enter a dollar or other currency amount.
- Date**: Allows users to enter a date or pick a date from a calendar.
- DateTime**: Allows users to enter a date and time or pick a date from a calendar.
- Email**: Allows users to enter an email address.
- Geolocation**: Allows users to define locations with latitude and longitude components.

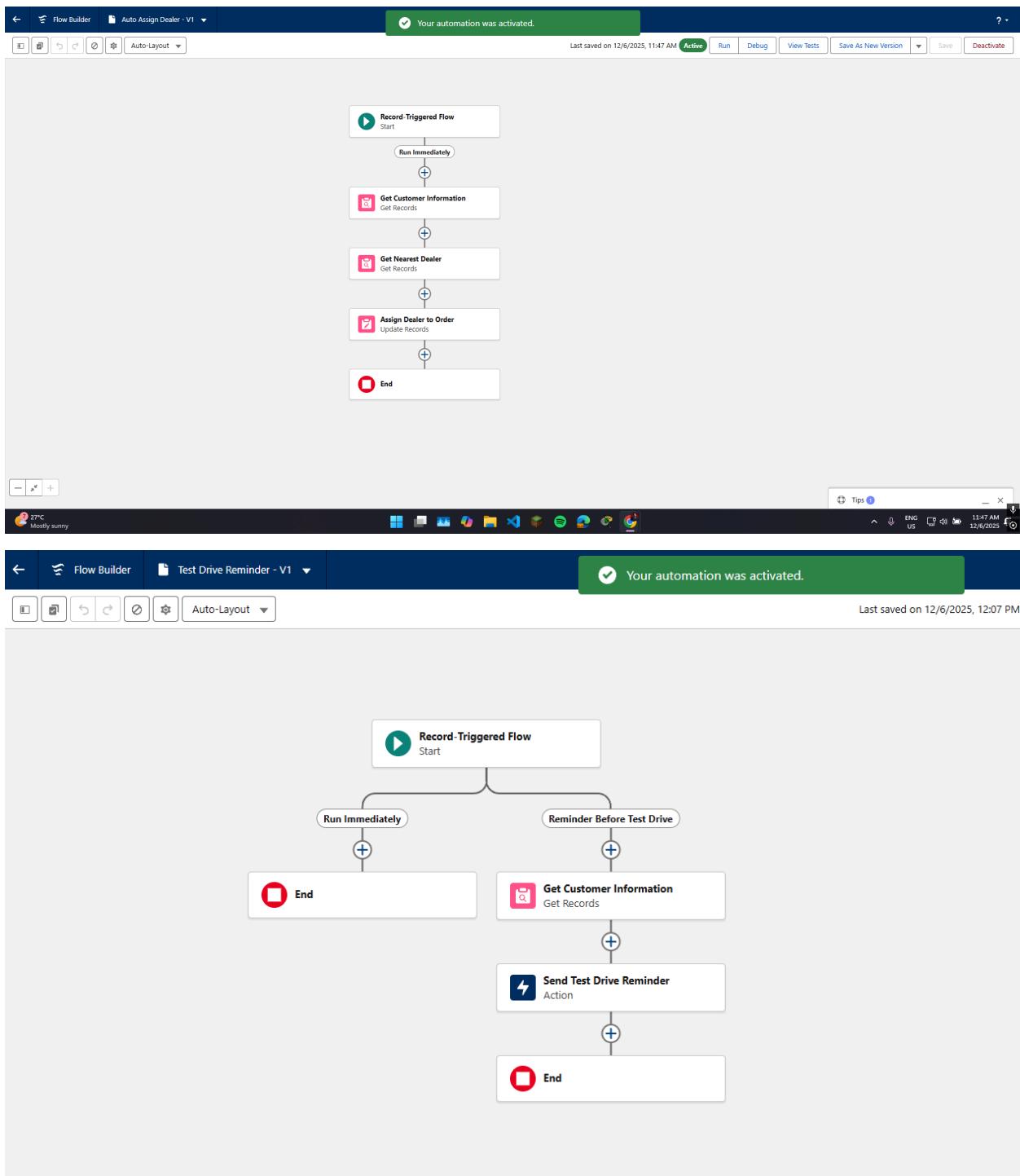
At the bottom right of the step 1 panel are 'Next' and 'Cancel' buttons. The status bar at the bottom shows it's 27°C, mostly sunny, and the system is connected to ENG US.

The screenshot shows the Salesforce Setup interface for viewing the list of existing fields for the Vehicle object. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various setup categories. The main content area is titled 'Vehicle Fields & Relationships' and shows a table of 9 items, sorted by Field Label. The table columns are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Price	Price_c	Currency(18,0)		
Status	Status_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)		✓

At the bottom right of the table are buttons for 'Quick Find', 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'. The status bar at the bottom shows it's 10:57 AM, 12/6/2025, and there is a 'Flood warning in effect' notification.

6. Flow Creation



Vehicle Test Drive

test drive sample 1

Related Details

Vehicle Test Drive Name: test drive sample 1

Vehicle Customer: Lester

Vehicle: Honda

Test Drive Date: 12/6/2025

Status: Scheduled

Created By: Justine Kyle Resureccion, 12/5/2025, 8:08 PM

Owner: Justine Kyle Resureccion

Last Modified By: Justine Kyle Resureccion, 12/5/2025, 8:08 PM

Gmail X

Compose

Inbox 3,037

Starred

Snoozed

Sent

Drafts 16

Purchases 64

Less

Important

Scheduled

All Mail

Spam 16

Trash

Manage subscriptions

Manage labels

Create new label

Labels +

Reminder: Your Test Drive is Tomorrow! Spam

Justine Kyle Resureccion [to me](#)

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

Report not spam

Dear Customer Lester,

This is a reminder that your scheduled test drive a04gL00000A0XgXNQ1 is tomorrow. If you need to reschedule please contact us at [support@gmail.com](#)

Thank you from WhatNext Vision Team!

Reply Forward (1)

7.Apex Trigger

Conclusion

The WhatNext Vision Motors Salesforce CRM implementation delivers a rock-solid, scalable, and fully automated solution perfectly tuned for the automotive world. It enforces stock checks to avoid mix-ups, automates dealer assignments for speed and accuracy, and taps into batch processing to streamline everything—ultimately boosting customer satisfaction and operational efficiency. This project showcases solid Salesforce fundamentals, real-world business smarts, and a commitment to best practices.

Future Enhancements

- AI-driven vehicle recommendations using Einstein
 - Chatbot integration for customer inquiries
 - Mobile-first experience for dealers
 - Integration with external ERP and inventory systems
 - Predictive analytics for demand forecasting