

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

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First name Last name

Job title Work email

Company Country/Region

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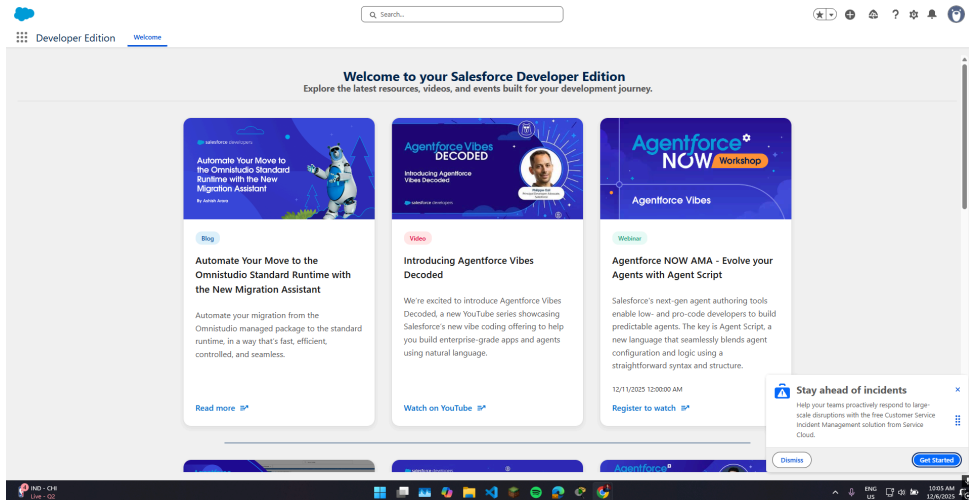
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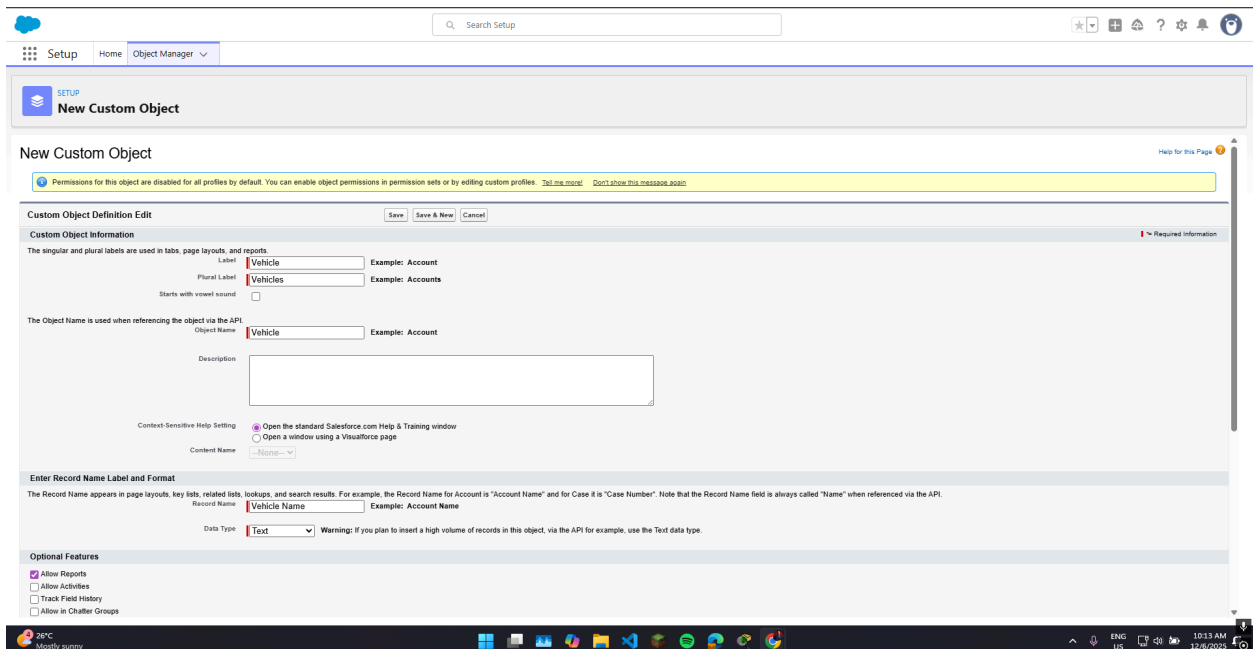
Sign Me Up



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



Cloud logo

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Vehicle Service Request

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

Object Access

Triggers

Flow Triggers

Validation Rules

Conditional Field Formatting

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

Edit Delete

USD/PHP
-0.32%

Windows taskbar icons

ENG US 10:24 AM 12/6/2023

3. Custom Tab Creation

Cloud logo

Search Setup

Setup Home Object Manager

Q tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for? Try using Global Search.

SETUP Tabs

New Custom Object Tab

Step 1. Enter the Details Step 1 of 3

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

(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

Next Cancel

27°C Mostly sunny

Windows taskbar icons

ENG US 10:28 AM 12/6/2023

Setup

Home

Object Manager

Q tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for? Try using Global Search.

SETUP

Tabs

Help for this Page

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.

Custom Object Tabs

New What Is This?

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

Web Tabs

New What Is This?

No Web Tabs have been defined

Visualforce Tabs

New What Is This?

No Visualforce Tabs have been defined

Lightning Component Tabs

New What Is This?

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

z7PC

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ENG
12/6/2025

10:31 AM

4. Creating the Lightning App

The screenshot shows the 'New Lightning App' setup page in Salesforce. The page is titled 'App Details & Branding' and includes instructions: 'Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.' The page is divided into two main sections: 'App Details' and 'App Branding'.

App Details:

- *App Name:** WhatNext Vision Motors
- *Developer Name:** WhatNext_Vision_Motors
- Description:** A automotive operations app using smart order management, automated dealer assignment, and real-time stock visibility.

App Branding:

- Image:** A placeholder for an app image with an 'Upload' button.
- Primary Color Hex:** #007002
- Org Theme Options:** A checkbox labeled 'Use the app's image and color instead of the org's custom theme' is currently unchecked.
- App Launcher Preview:** A preview of the app icon (a blue square with 'WV') and the app name 'WhatNext Vision Motors' with its description.

A 'Next' button is located at the bottom right of the setup page. Below the setup page, a table lists existing Lightning apps:

ID	App Name	App Label	Description	Created At	Theme	Status
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	✓

The screenshot shows the 'New Lightning App' setup page in Salesforce, specifically the 'Navigation Items' step. The page is titled 'Navigation Items' and includes instructions: '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.'

The page is divided into two main sections: 'Available Items' and 'Selected Items'.

Available Items:

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

Selected Items:

No items selected

A 'Back' button is located at the bottom left, and a 'Next' button is at the bottom right. Below the setup page, a table lists existing Lightning apps:

ID	App Name	App Label	Description	Created At	Theme	Status
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	✓

salesforce manLightning Experience | Salesforcephilippines.mykillwalet.au/dasRecently Viewed | Vehicle CustMaggot | Messenger

FPS N/A | GPU 18% | CPU 24% | RAM N/A

https://orgfarm-2b342f520b-dev-ed.develop.lightning.force.com/lightning/o/Vehicle_Customer_c/list?filterName=__Recent

WhatNext Vision Motors

Vehicle CustomersVehicle DealersVehicle OrdersVehicle Service RequestsVehicle Test DrivesVehiclesReportsDashboards

Search...

Favorites

+

Help

?

Settings

🔔

👤

Vehicle Customers

Recently Viewed

NewImportChange OwnerAssign Label

0 items • Updated a few seconds ago

Search this list...

🔍


📄

🔄

🔗

🔧


🗑️



Nothing to see here

There's nothing in your list yet. Try adding a new record.

37°C
Mostly sunny



ENG
US

10:47 AM
12/6/2025

5. Object Field Creation

Setup

Home

Object Manager

Q Search Setup

Star

Share

Print

Help

Refresh

Close

SETUP > OBJECT MANAGER

Vehicle

Details

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Buttons, Links, and Actions

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List View Button Layout

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Validation Rules

Conditional Field Formatting

Vehicle

New Custom Field

Help for this Page

Step 1. Choose the field type

Next

Cancel

Specify the type of information that the custom field will contain.

Data Type

Select one of the data types below.

☒ None Selected

☐ Auto Number

☐ Formula

☐ Roll-Up Summary

☐ Lookup Relationship

☐ Master-Detail Relationship

☐ External Lookup Relationship

☐ Checkbox

☐ Currency

☐ Date

☐ DateTime

☐ Email

☐ Geolocation

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

A read-only field that displays 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.

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create roll-up summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a popup calendar.

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the DateTime field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for most emails.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

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US

10:33 AM

12/6/2025

SETUP > OBJECT MANAGER

Vehicle

Details

Fields & Relationships

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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)		
Last Modified By	LastModifiedById	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)		✓

Flood warning

In effect

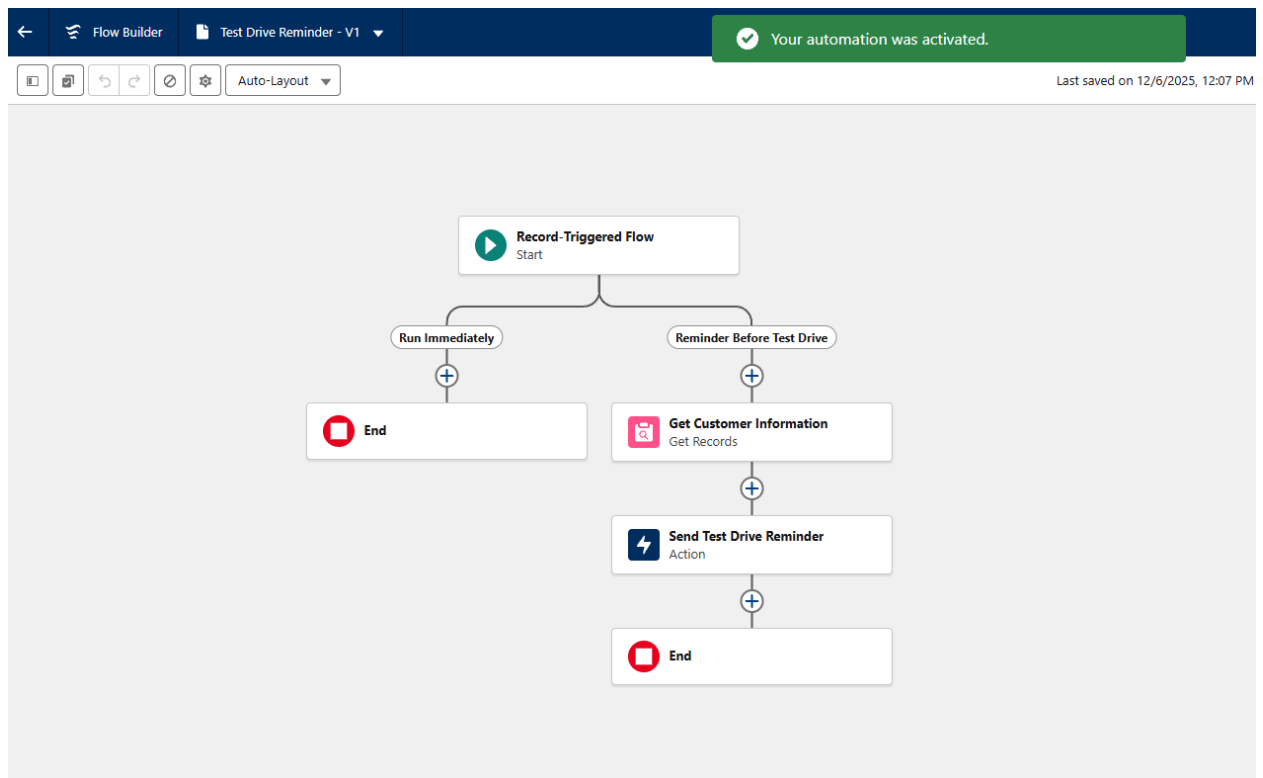
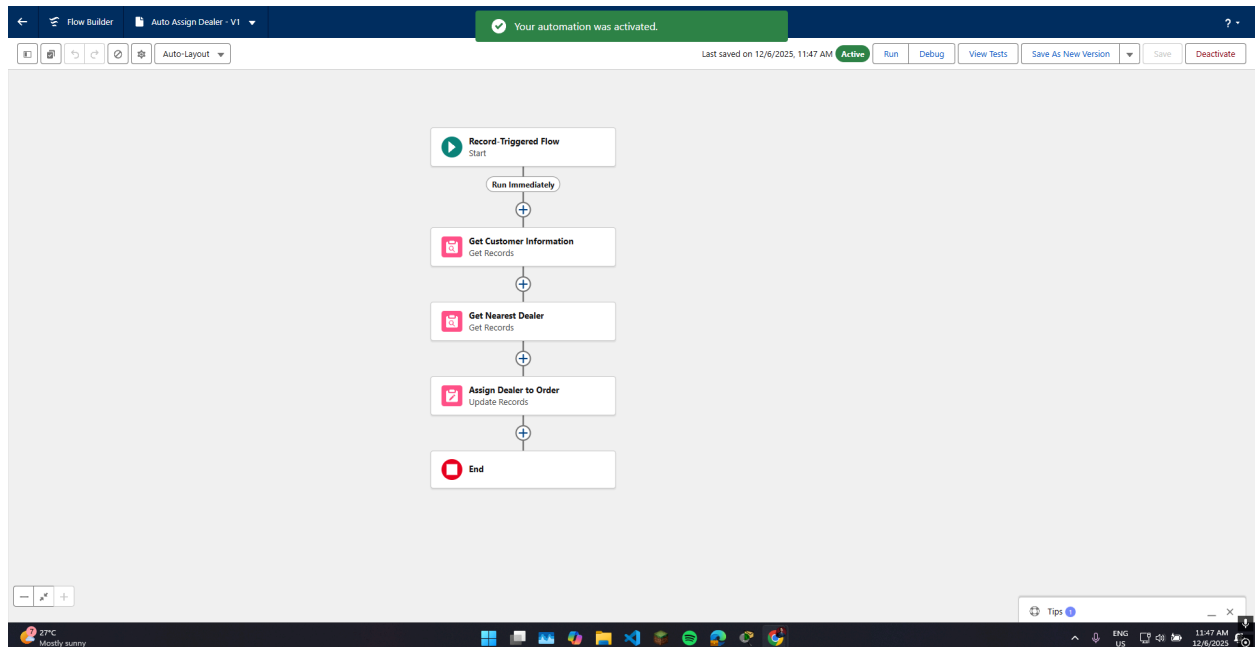
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12/6/2025

6. Flow Creation





Vehicle Test Drive

test drive sample 1

Related

Details

Vehicle Test Drive Name

test drive sample 1



Owner

[Justine Kyle Resurreccion](#)



Vehicle Customer

[Lester](#)



Vehicle

[Honda](#)



Test Drive Date

12/6/2025



Status

Scheduled



Created By

[Justine Kyle Resurreccion](#), 12/5/2025, 8:08 PM

Last Modified By

[Justine Kyle Resurreccion](#), 12/5/2025, 8:08 PM

Gmail

in:spam

Delete forever | Not spam | 1

1 of 17

Reminder: Your Test Drive is Tomorrow! [Spam](#)

[Justine Kyle Resurreccion](#) [in:spam](#) [to me](#)

12:09 PM (0 minutes 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 Customer Lester,

This is a reminder that your scheduled test drive a04gL00000AXgXNQA1 is tomorrow. If you need to reschedule please contact us at guacoti@gmail.com

Thank you from WhatNext Vision Team!

[Reply](#)

[Forward](#)



7.Apex Trigger

The screenshot displays the Salesforce IDE interface. The top pane shows the source code for the `VehicleOrderTriggerHandler` class. The code implements a trigger that handles vehicle orders, checking stock levels and updating order status. The bottom pane shows the execution logs for the trigger, indicating successful execution for multiple records.

```
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 isInsert, Boolean isUpdate) {
4         if (isBefore && (isInsert || isUpdate)) {
5             preventOrderIfOutOfStock(newOrders);
6         }
7
8         if (isAfter && (isInsert || isUpdate)) {
9             updateStockOnOrderPlacement(newOrders);
10        }
11    }
12
13    // Method to prevent orders when the vehicle is out of stock
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()) {
23            Map<Id, Vehicle__c> vehicleStockMap = new Map<Id, Vehicle__c>{
24                [SELECT Id, Stock_Quantity__c FROM Vehicle__c WHERE Id IN :vehicleIds]
25            };
26
27            for (Vehicle_Order__c order : orders) {
```

User	Application	Operation	Time	Status	Read	Size
Justine Kyle Resurrection	Unknown	/services/data/v55.0/tooling/executeAnonymous/	12/6/2025, 2:25:38 PM	Success	Unread	3.12 KB
Justine Kyle Resurrection	Browser	/aura	12/6/2025, 2:22:08 PM	Success	Unread	7.81 KB
Justine Kyle Resurrection	Unknown	common.api.soap.DirectSoap	12/6/2025, 2:22:08 PM	Success	Unread	530 bytes
Justine Kyle Resurrection	Browser	/aura	12/6/2025, 2:20:56 PM	Success	Unread	16.39 KB
Justine Kyle Resurrection	Unknown	common.api.soap.DirectSoap	12/6/2025, 2:20:56 PM	Success	Unread	531 bytes

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