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BSIT 4-1
PUP-STC

Guidelines for Salesforce Project
Documentation And Demo Video Presentation

Project Overview:

WhatsNext Vision Motors is implementing a Salesforce project to enhance customer experience. The system will automatically suggest the nearest dealer to customers based on their address or location, improving convenience during the ordering process. It also prevents customers from ordering vehicles that are out of stock, reducing confusion and ensuring accurate order creation.

Objectives:

The project aims to improve customer satisfaction, reduce errors, and increase operational efficiency by minimizing manual tasks. The CRM improves customer handling, automated dealer matching, streamlines booking processes, and offers real-time insights into stock levels.

Phase 1:Requirement Analysis & Planning

Understanding Business Requirements:

- Automatically matching customers with their closest dealer.
- Blocking order creation when a vehicle is unavailable or out of stock.
- Maintaining organized records for vehicles, test drives, customers, orders, dealers, and service requests.
- Sending email notifications to remind customers of their upcoming test drives.
- Ensuring order status accuracy through automated scheduled jobs and batch processes.
- Equipping administrators with dashboards and reports for better business insights.

Defining Project Scope and Objectives:

- Created six custom objects and linked them together.
- Added automation using Flows and Apex class and Apex trigger.
- Set up validation rules and stock checks.
- Built a Lightning App to help users navigate the system.
- Performed testing and deployed the final setup.

Design Data Model and Security Model

Data Model Includes:

- **Vehicle__c** – contains vehicle details.
- **Vehicle_Dealer__c** – contains information about authorized dealers.
- **Vehicle_Customer__c** – contains customer profile records.
- **Vehicle_Order__c** – manages vehicle purchase orders.
- **Vehicle_Test_Drive__c** – manages test drive activities.
- **Vehicle_Service_Request__c** – records vehicle service requests.

Security Model Includes:

- Set up profiles, roles, and permission sets.
- Configured sharing rules for object and record access.
- Enabled field history tracking for key fields like stock, status, and email.

Stakeholders Mapping

- **System Admin:** Manages the whole CRM system.
- **Dealers:** Receives orders and delivers the vehicles.
- **Customers:** Benefit from faster and easier service.

Execution RoadMap.

I. Data Modeling → Creation of custom objects
II. Backend Automation → Triggers, batch jobs
III. UI Development → Create Lightning App and Page Layouts
IV. Testing → Unit tests, flow tests, process validation
V. Deployment → Change Set deployment
VI. Documentation

Phase 2:Salesforce Development - Backend & Configurations

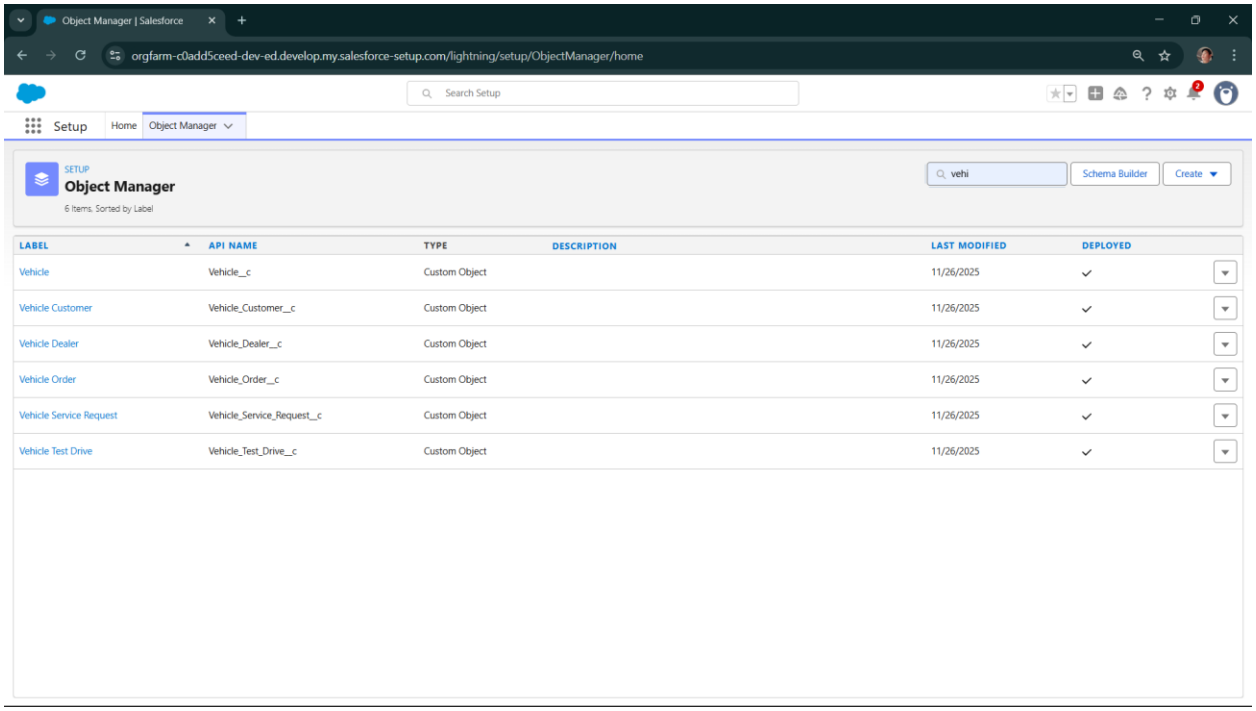
Setup environment & DevOps workflow

- Set up a Salesforce Developer Org to create and test custom objects, fields, flows, and Apex code.
- Used Change Sets to manage and deploy changes in a controlled way.
- Worked in the Developer Console to write, debug, and test Apex classes and triggers.
- Created a smooth DevOps workflow for version control, avoiding conflicts, and organized testing and deployment.

Customization of Objects, Fields, Validation Rules, Automation (Workflow Rules, Process Builder, Flows, Approval Process).

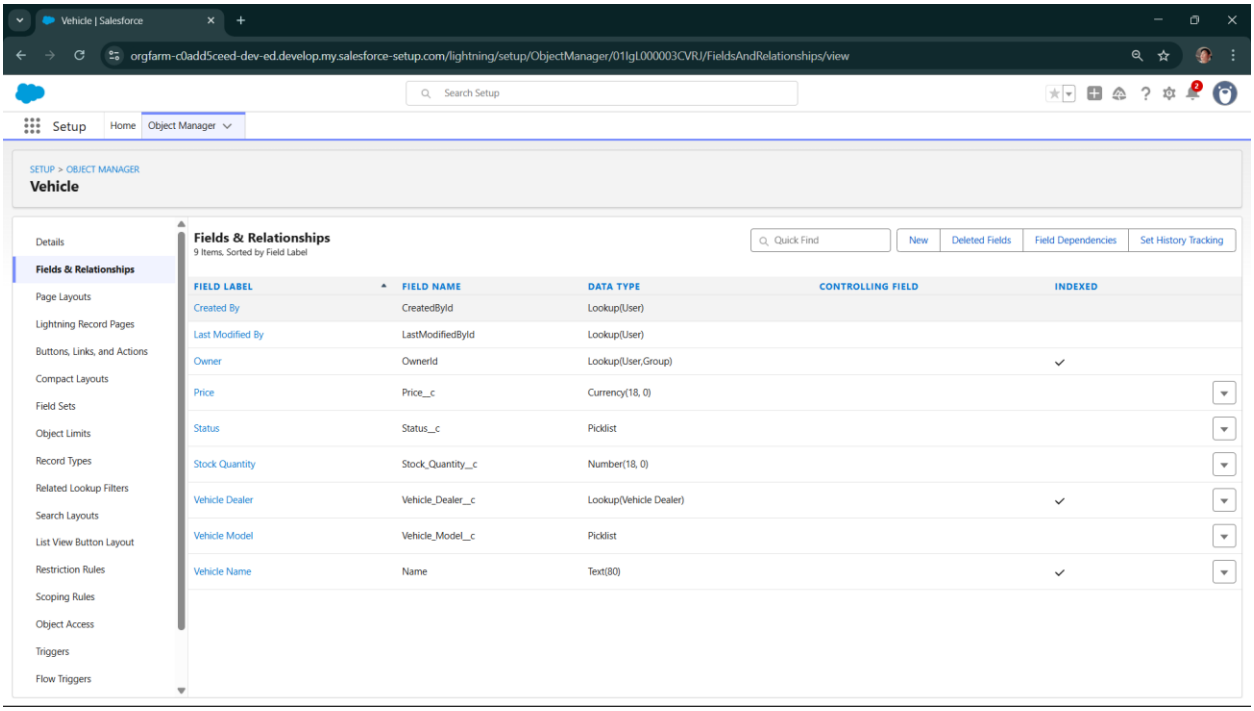
Custom Objects Created:

- Vehicle__c
- Vehicle_Dealer__c
- Vehicle_Customer__c
- Vehicle_Order__c
- Vehicle_Test_Drive__c
- Vehicle_Service_Request__c



Each object contains fields and relationships such as:

- Stock_Quantity__c
- Status__c
- Dealer_Location__c
- Preferred_Vehicle_Type__c
- Order_Date__c
- Test_Drive_Date__c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Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Fields & Relationships
9 Items, Sorted by Field Label
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
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Vehicle_Model__c
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Name
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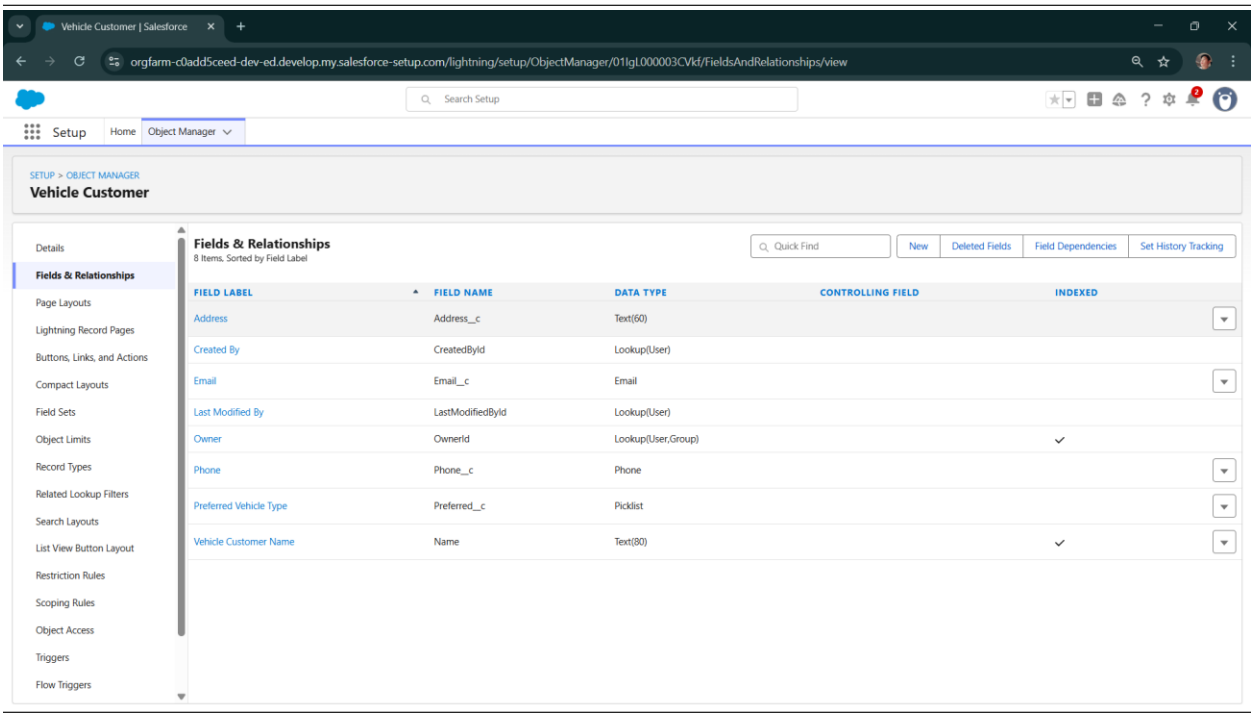
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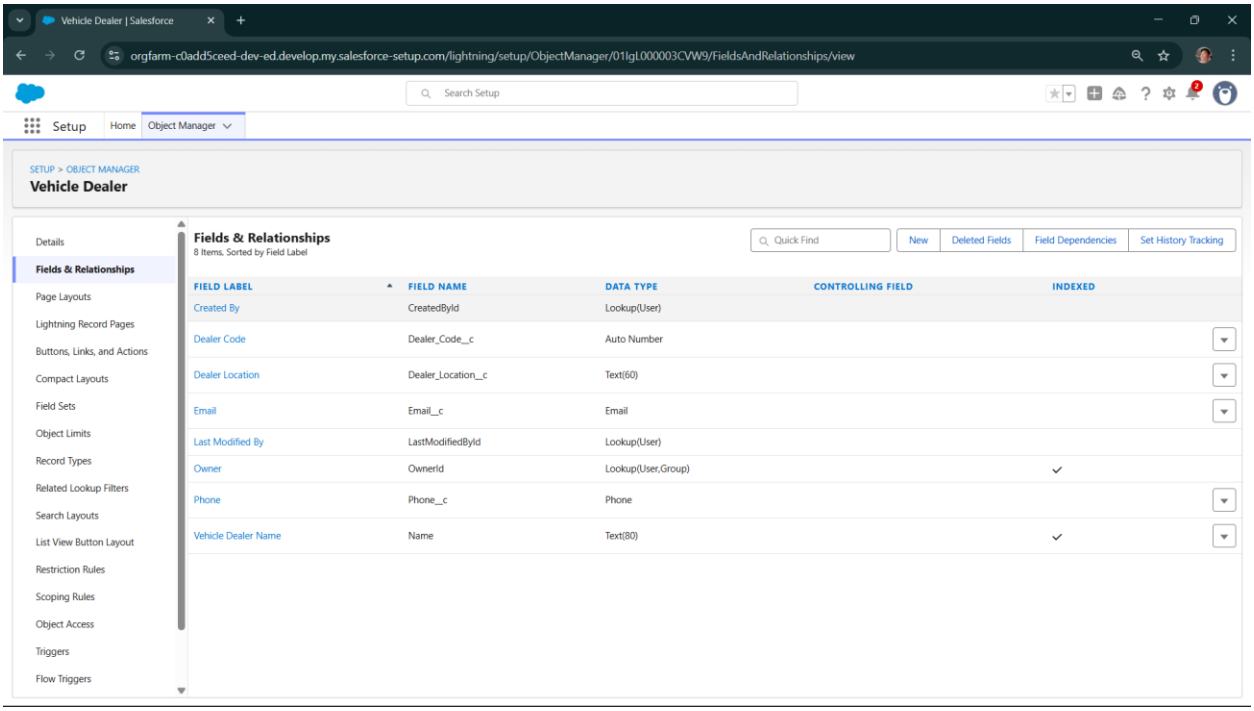
Address__c
Text(60)
Created By
CreatedById
Lookup(User)
Email
Email__c
Email
Last Modified By
LastModifiedById
Lookup(User)
Owner
OwnerId
Lookup(User,Group)
Phone
Phone__c
Phone
Preferred Vehicle Type
Preferred__c
Picklist
Vehicle Customer Name
Name
Text(80)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FIELD LABEL
FIELD NAME
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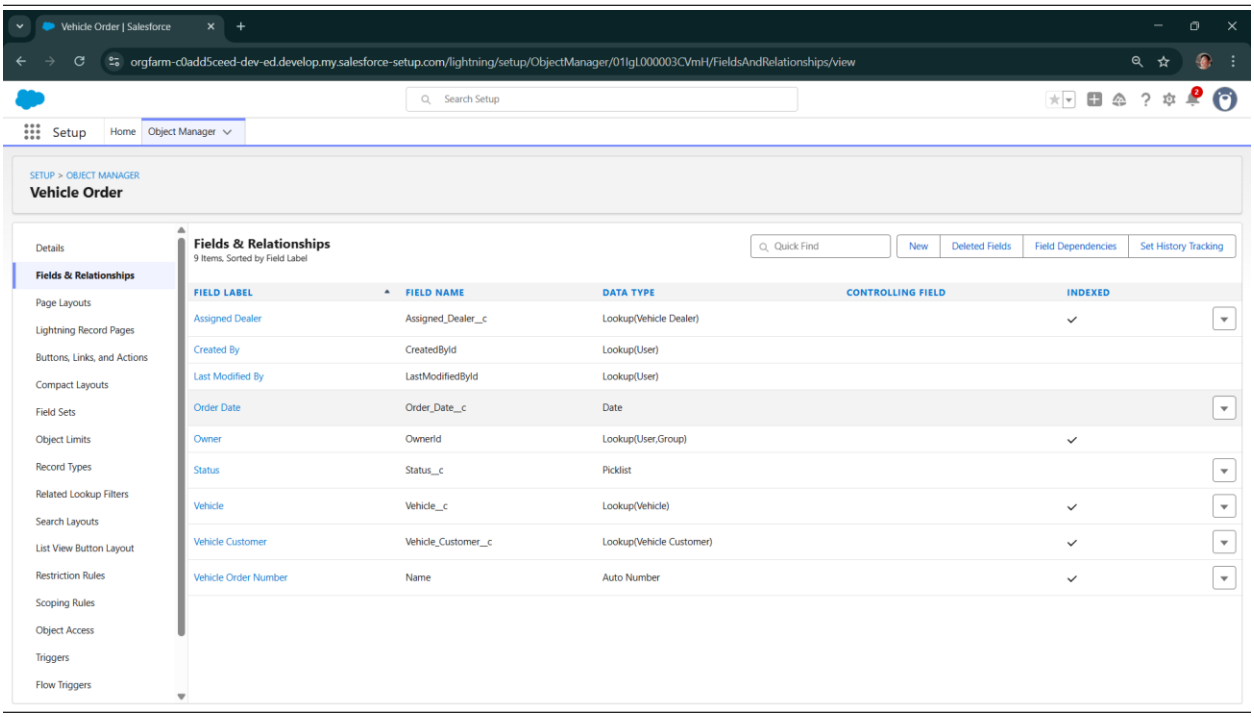
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Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
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Assigned Dealer
Assigned_Dealer__c
Lookup(Vehicle Dealer)
Created By
CreatedById
Lookup(User)
Last Modified By
LastModifiedById
Lookup(User)
Order Date
Order_Date__c
Date
Owner
OwnerId
Lookup(User,Group)
Status
Status__c
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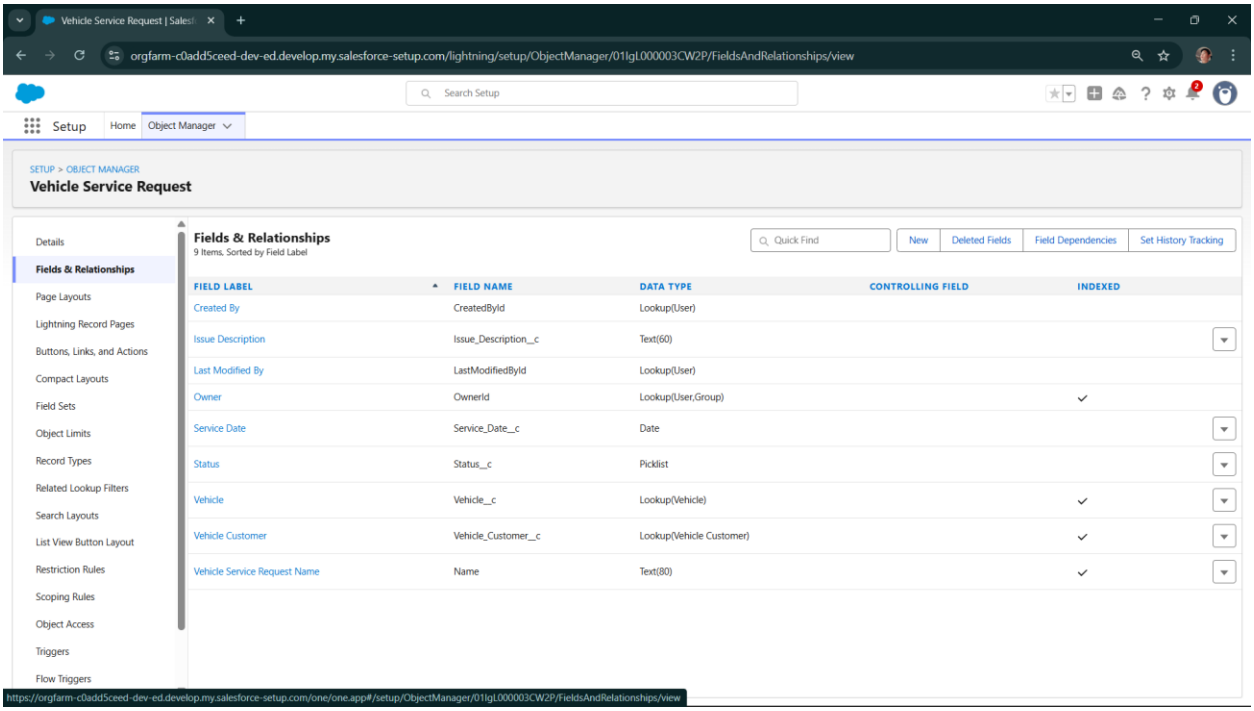
Lookup(Vehicle Customer)
Vehicle Order Number
Name
Auto Number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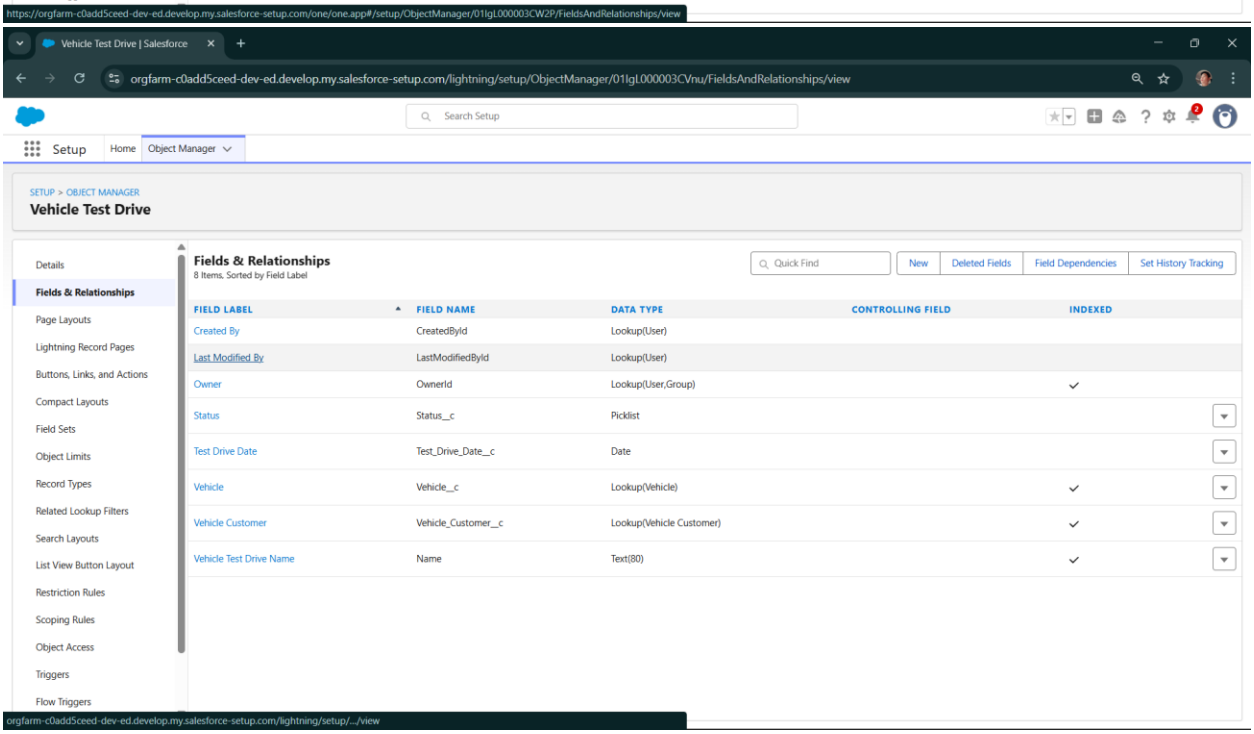
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Test_Drive_Date__c
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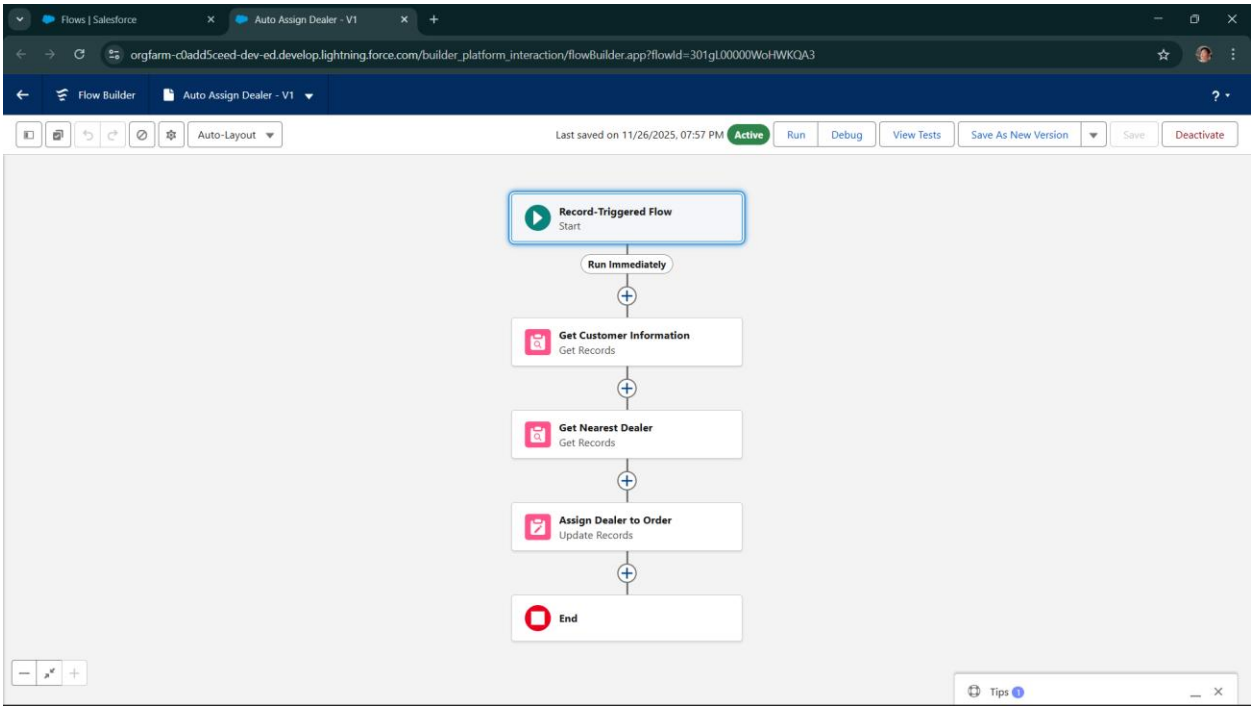
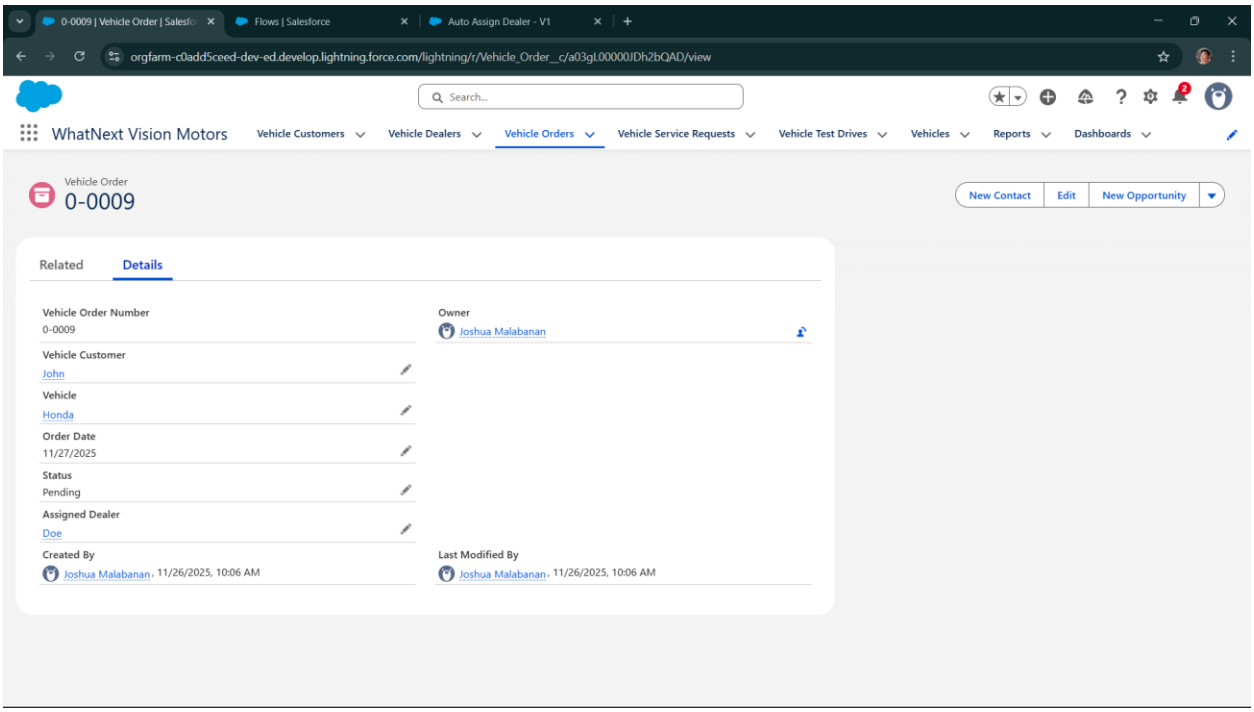
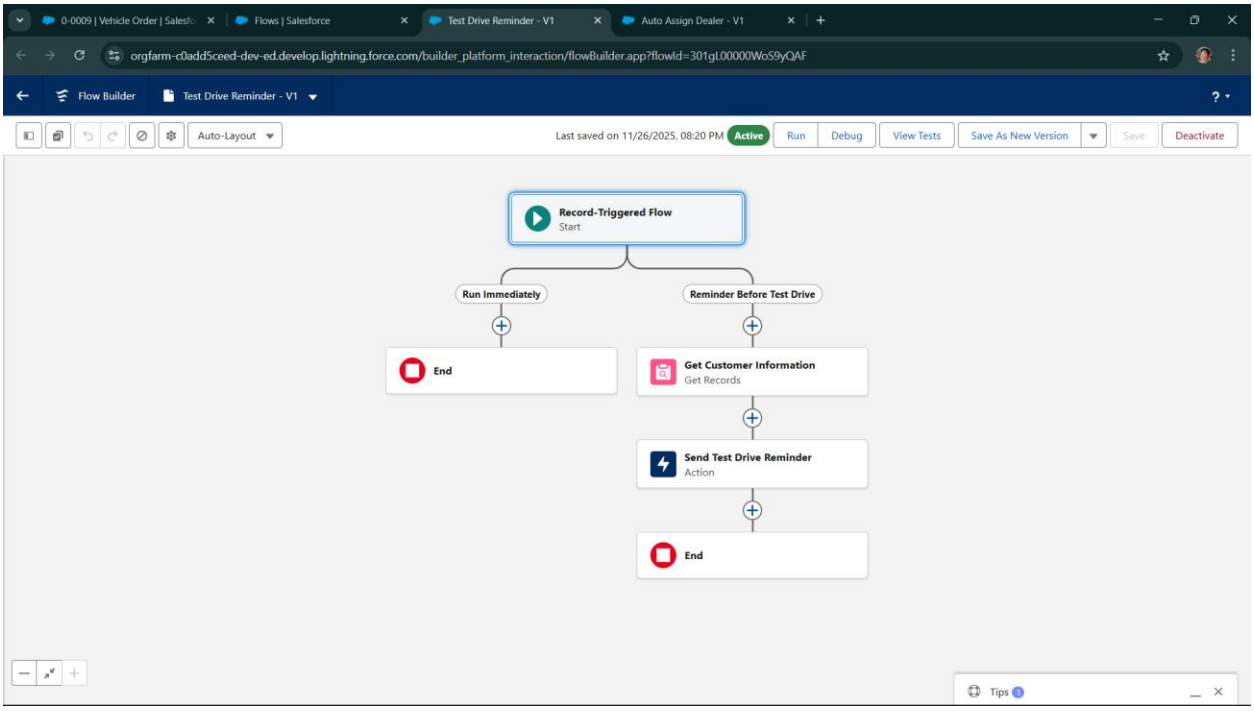
Automation

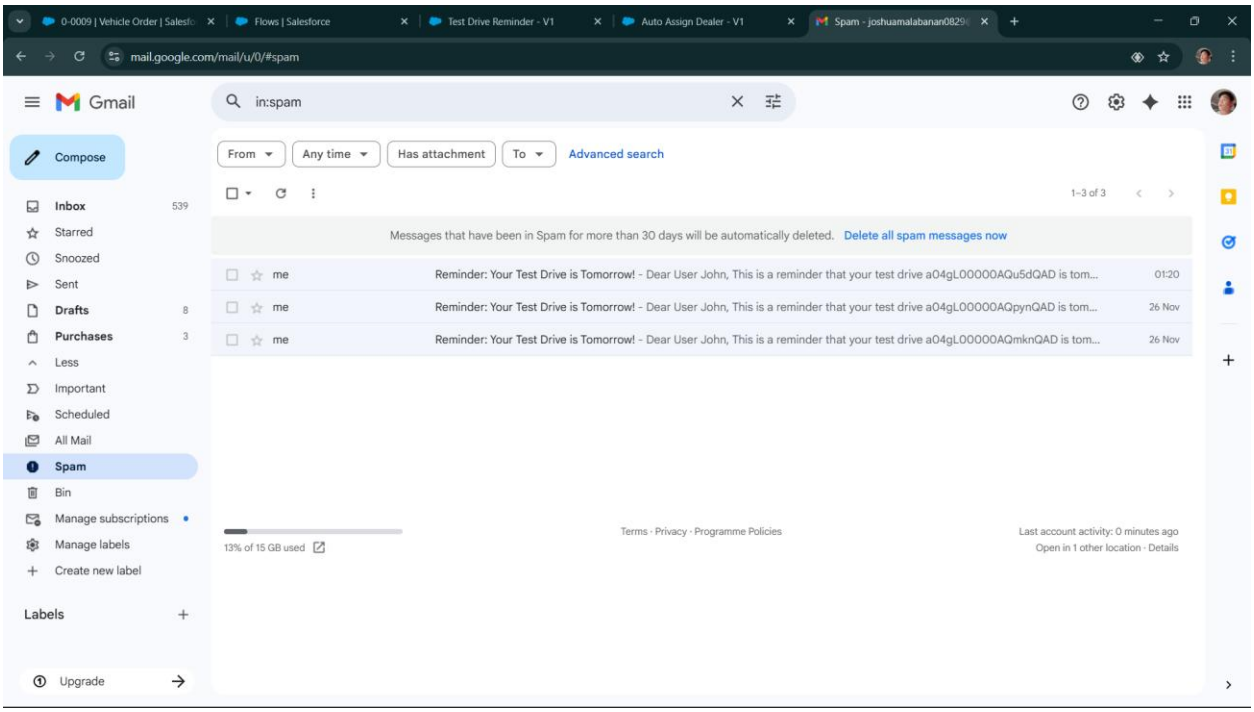
1. Auto Assign Dealer





2. Test Drive Reminder





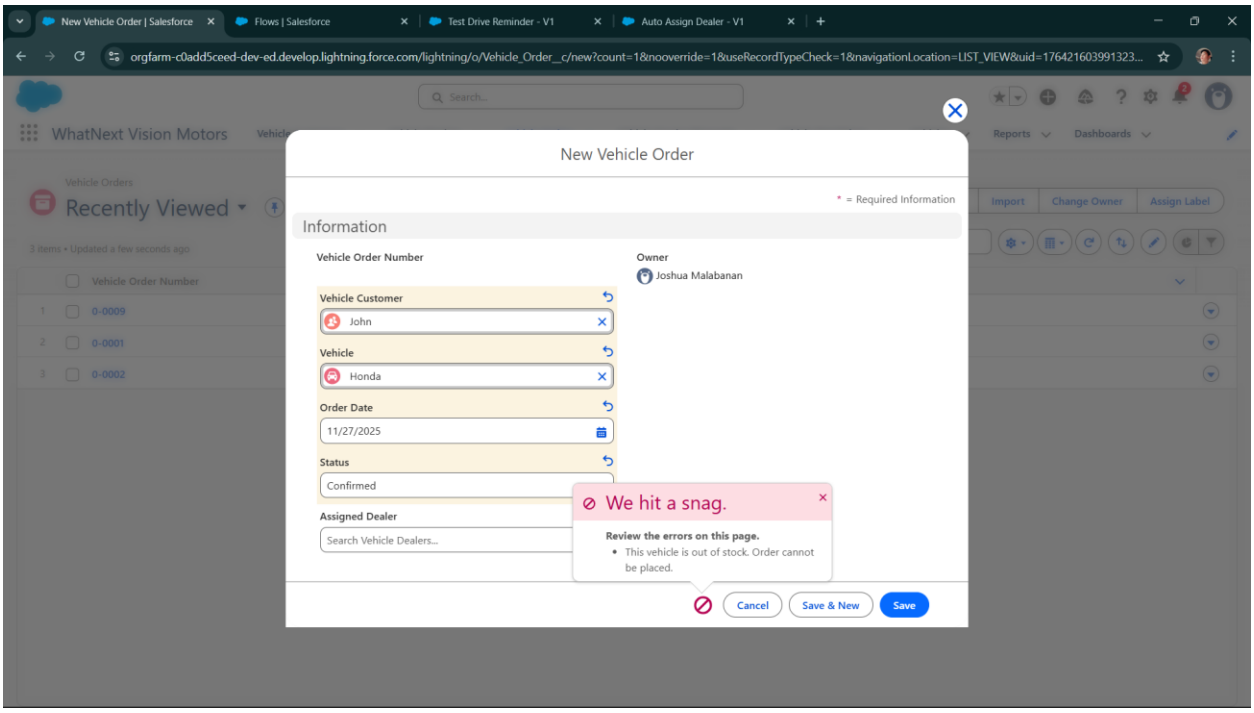
Apex Classes, Triggers, Asynchronous Apex Classes (if developed, explain briefly).

Apex Trigger Handler

- Blocking orders when a vehicle is out of stock.
- Decreasing vehicle stock once an order is confirmed.

Trigger

Executed before or after inserting and updating records in Vehicle_Order__c.



Asynchronous Apex

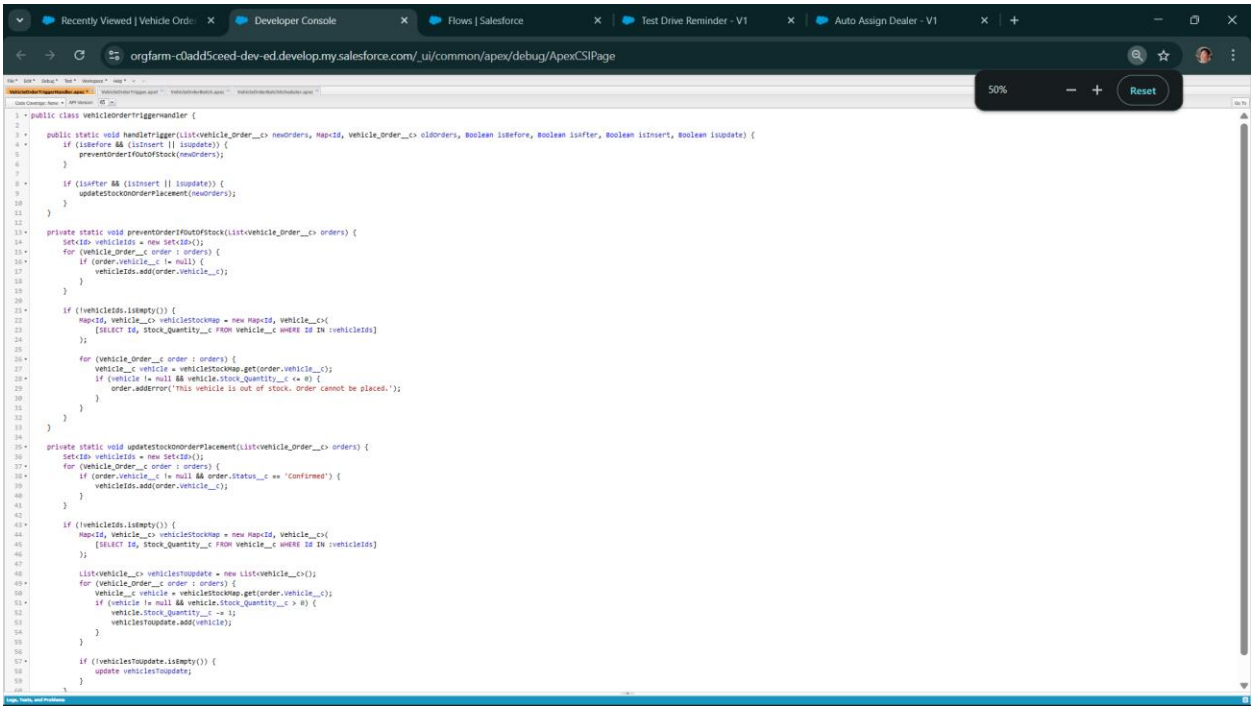
Batch Apex

- Reviews all pending orders.
- Confirms orders automatically when vehicle stock is available.
- Updates stock levels accordingly.

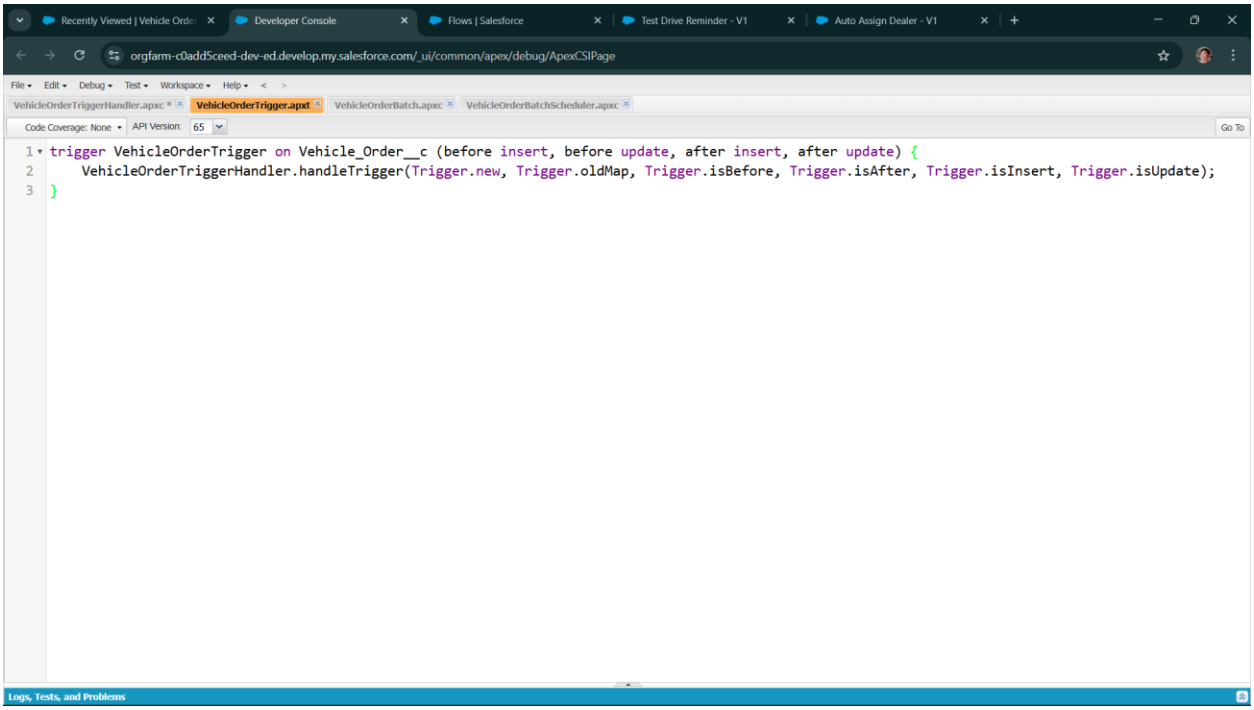
Scheduled Apex

- Runs the batch process daily at a set time.

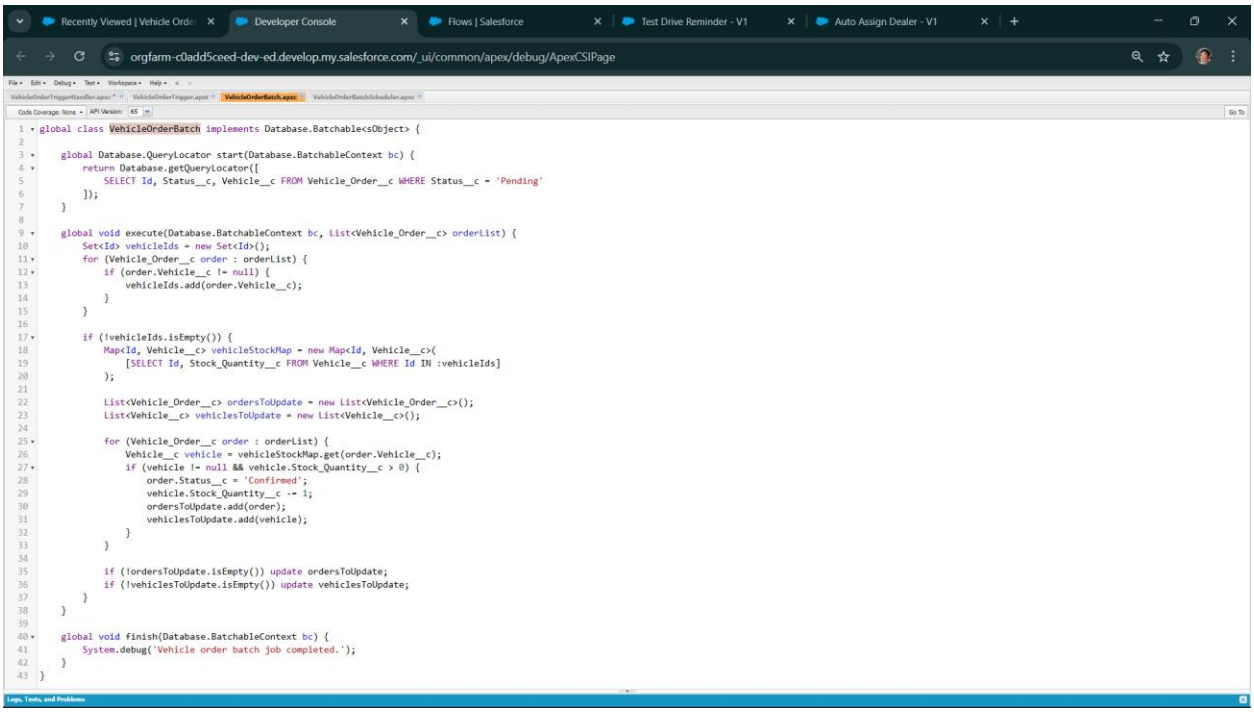
Apex Class VehicleOrderTriggerHandler



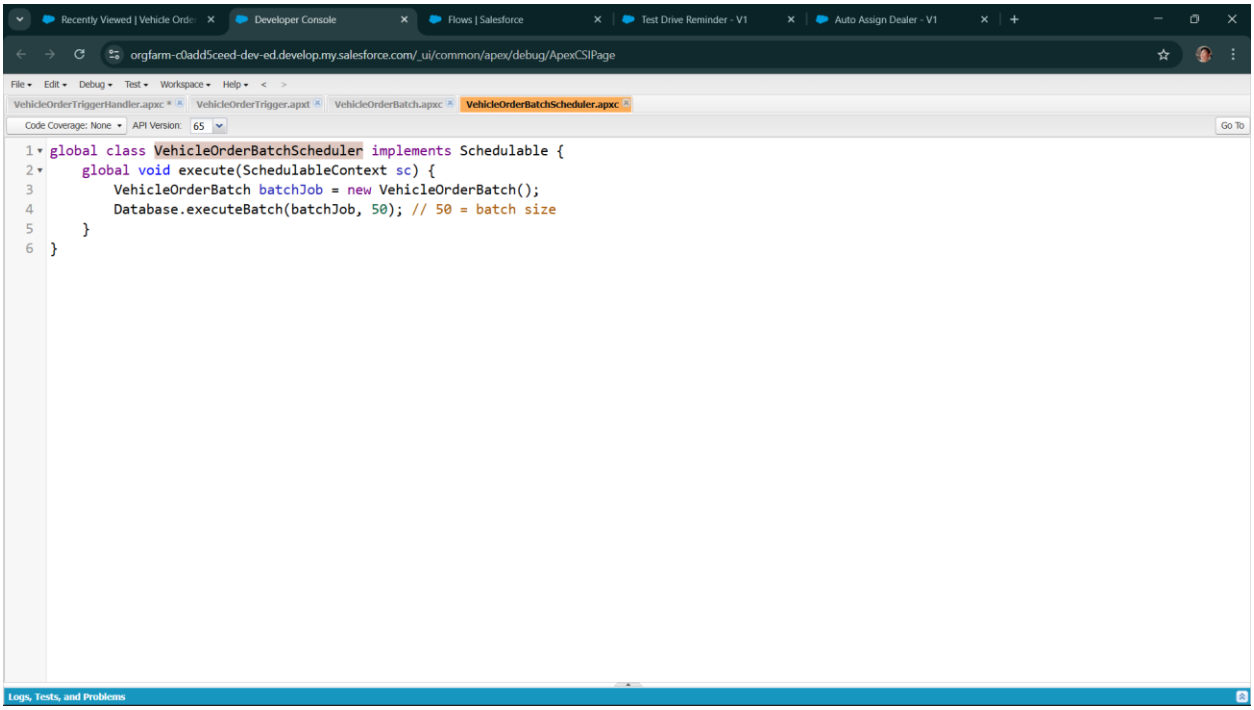
Apex Trigger VehicleOrderTrigger



Apex Class VehicleOrderBatch



Apex Class VehicleOrderBatchScheduler

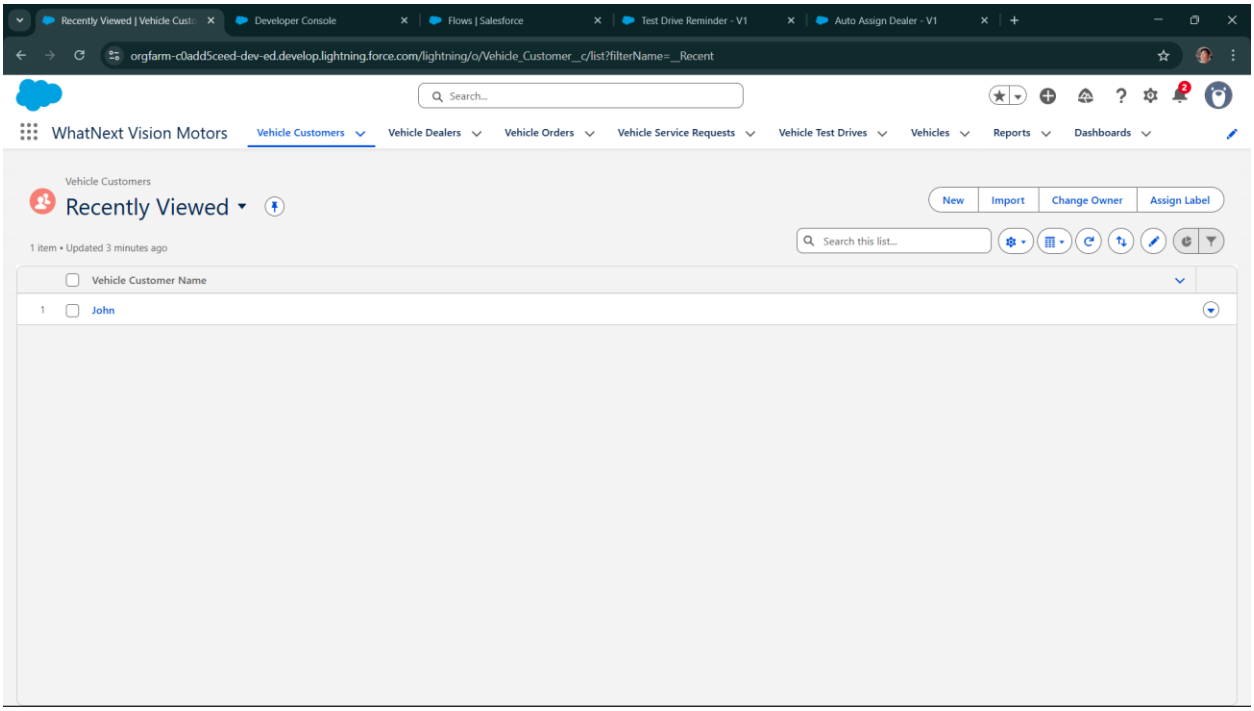


Phase 3:UI/UX Development & Customization

Lightning App setup through App Manager.

Created "**WhatsNext Vision Motors**" App:

- Includes navigation tabs for Vehicles, Dealers, Customers, Orders, Test Drives, Service Requests, Reports, and Dashboards.



Page Layouts, Dynamic Forms.

- Designed layouts for each object.
- Showed fields based on user roles.
- Hid or showed fields when needed.

User Management.

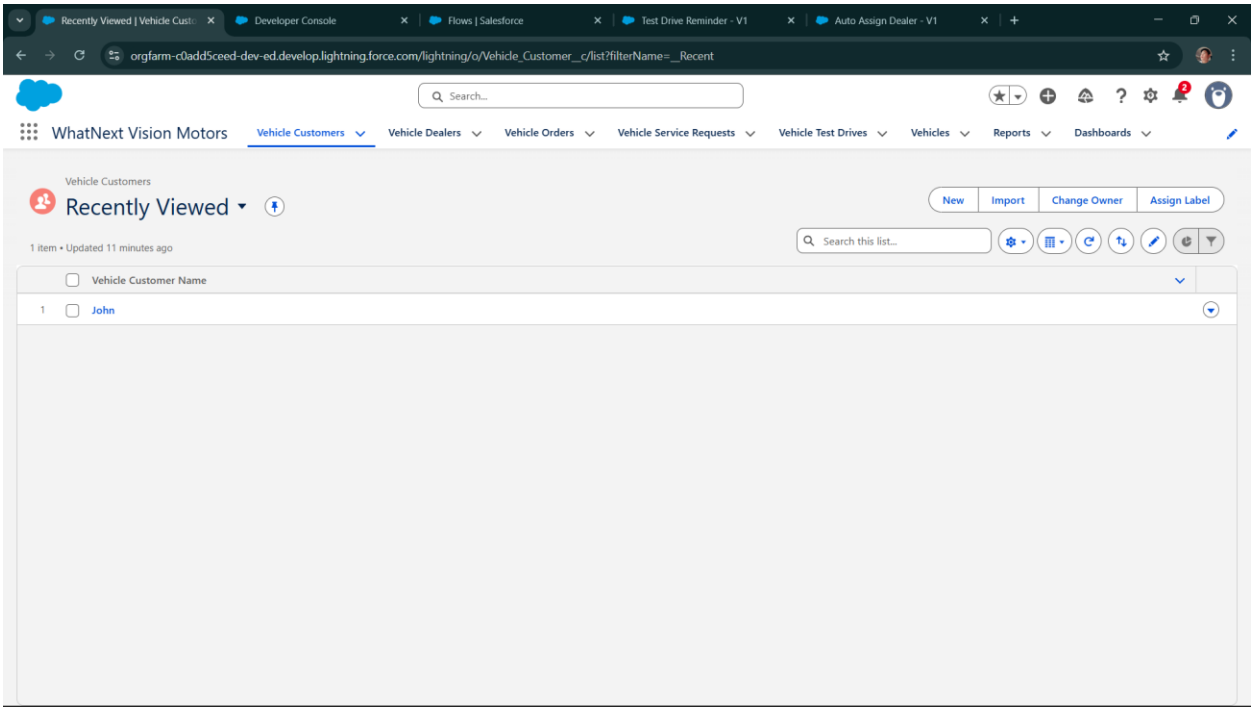
- Assigned System Administrator profile.
- Set up app access for users.

Reports and Dashboards.

- Vehicle Stock
- Dealer Assignments
- Test Drive Summary
- Vehicle Orders

Lightning Pages

- Created custom pages for Vehicle, Dealer, and Customer.
- Added related lists and quick actions.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Auto Assign Dealer - V1
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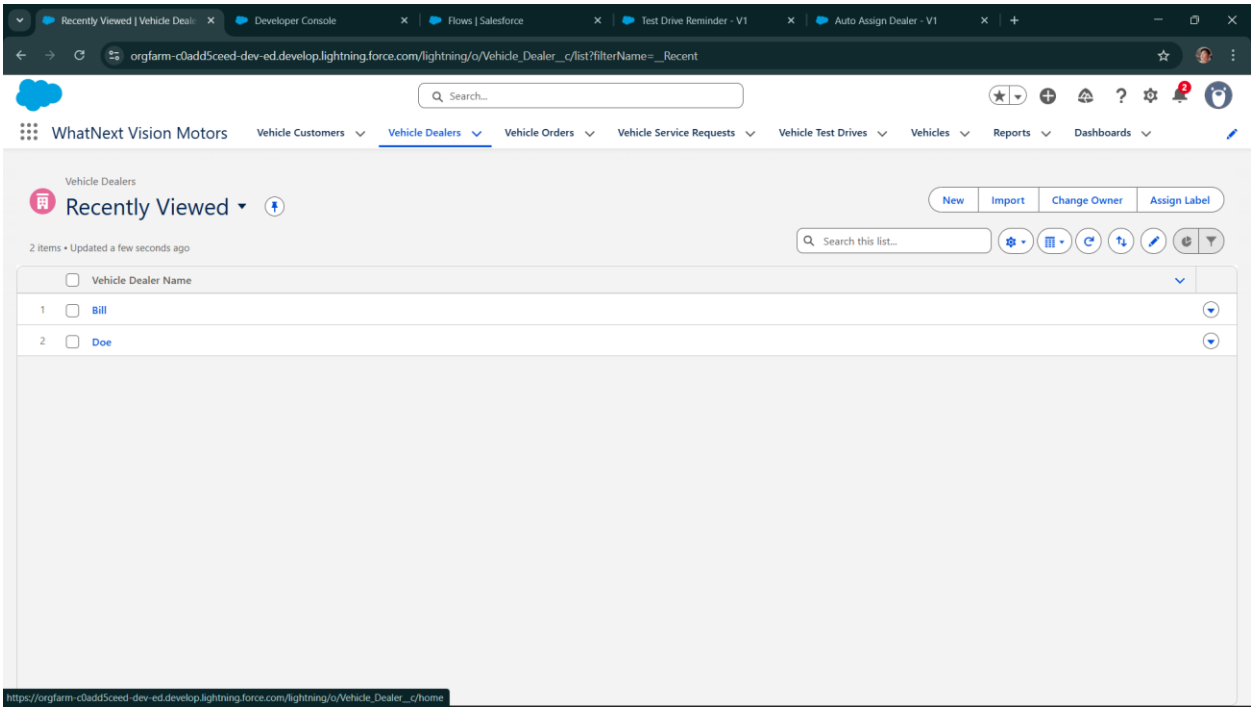
Vehicle Orders
Vehicle Service Requests
Vehicle Test Drives
Vehicles
Reports
Dashboards
Vehicle Customers
Recently Viewed
New
Import
Change Owner
Assign Label
1 item • Updated 11 minutes ago
Search this list...
Vehicle Customer Name
1
John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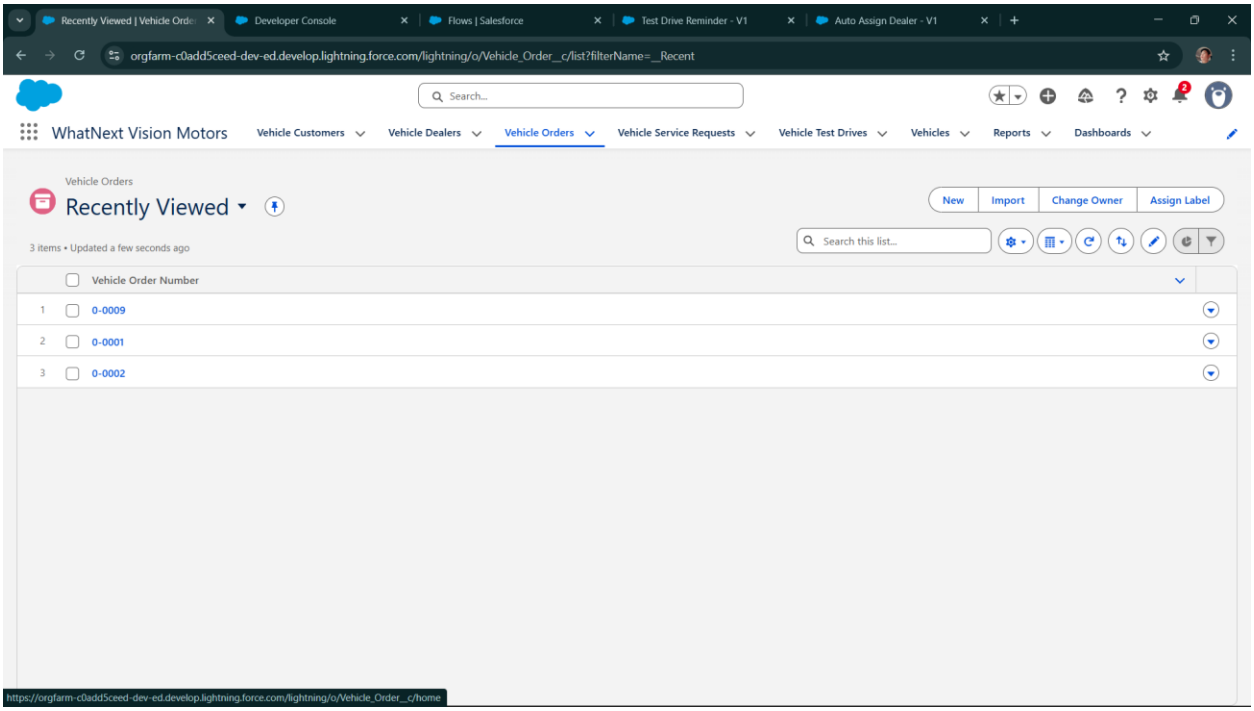
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3 0-0002
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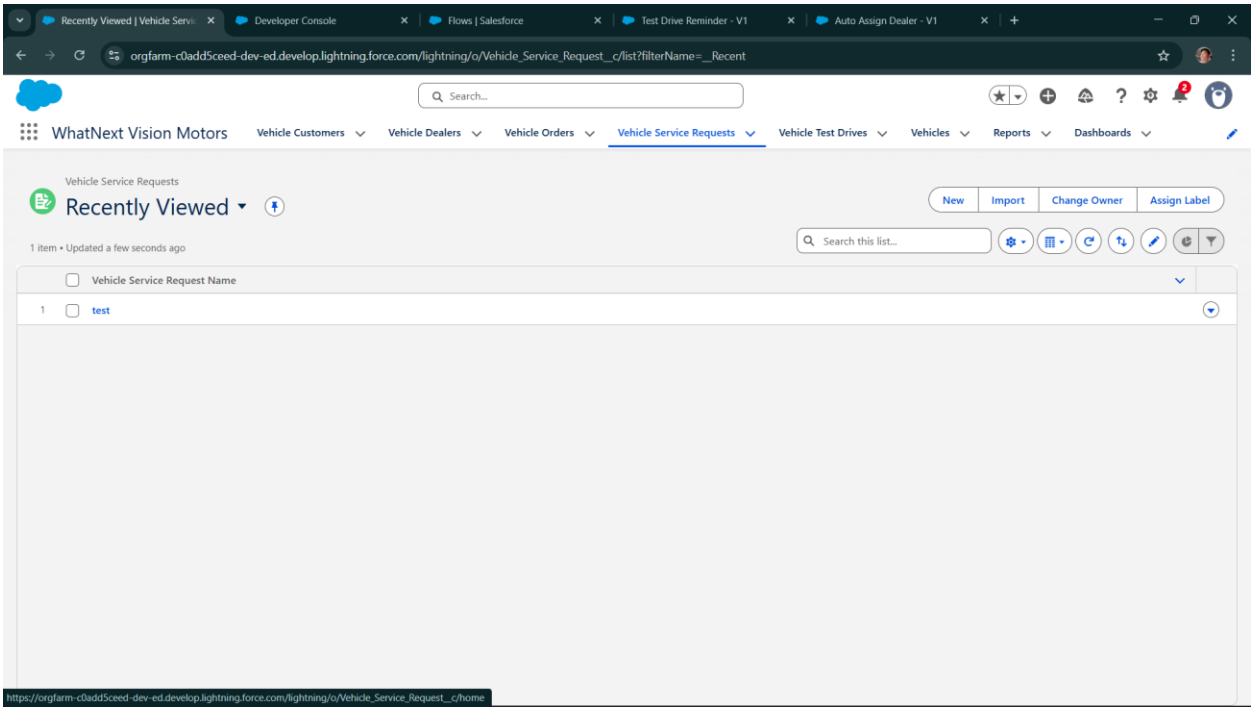
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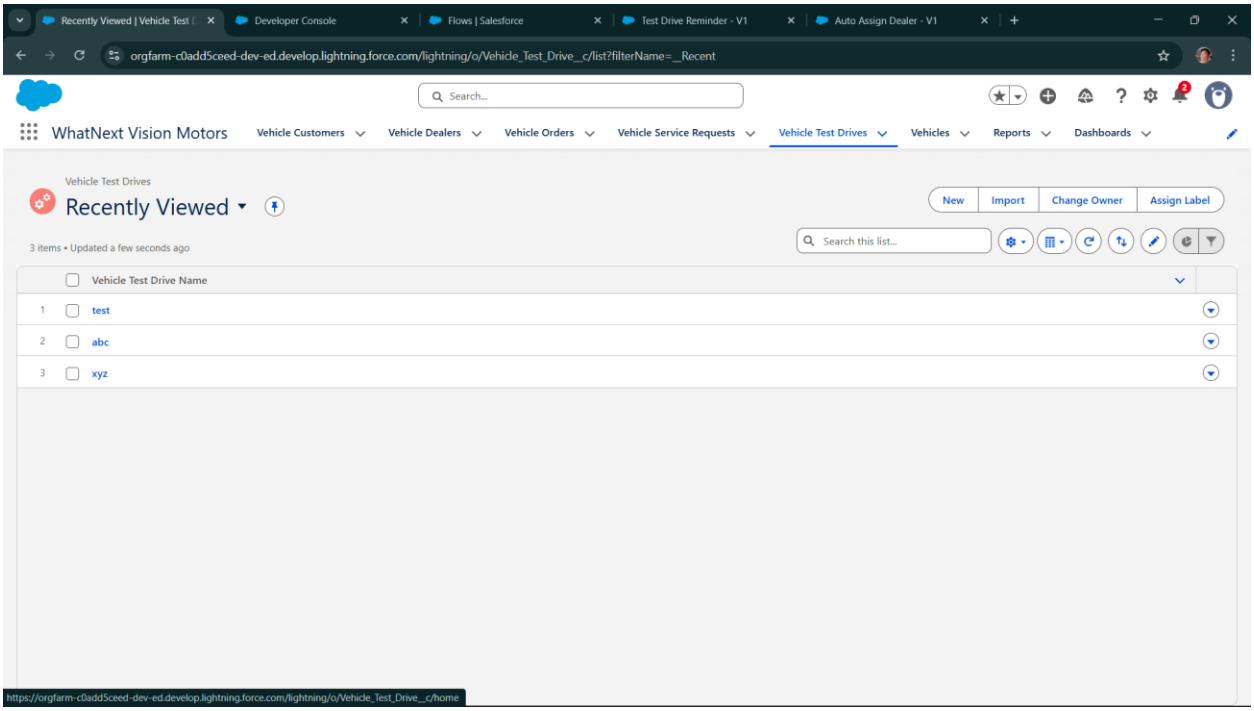
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Vehicle Orders
Vehicle Service Requests
Vehicle Test Drives
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Reports
Dashboards
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Recently Viewed
New
Import
Change Owner
Assign Label
3 items • Updated a few seconds ago
Search this list...
Vehicle Test Drive Name
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2 abc
3 xyz
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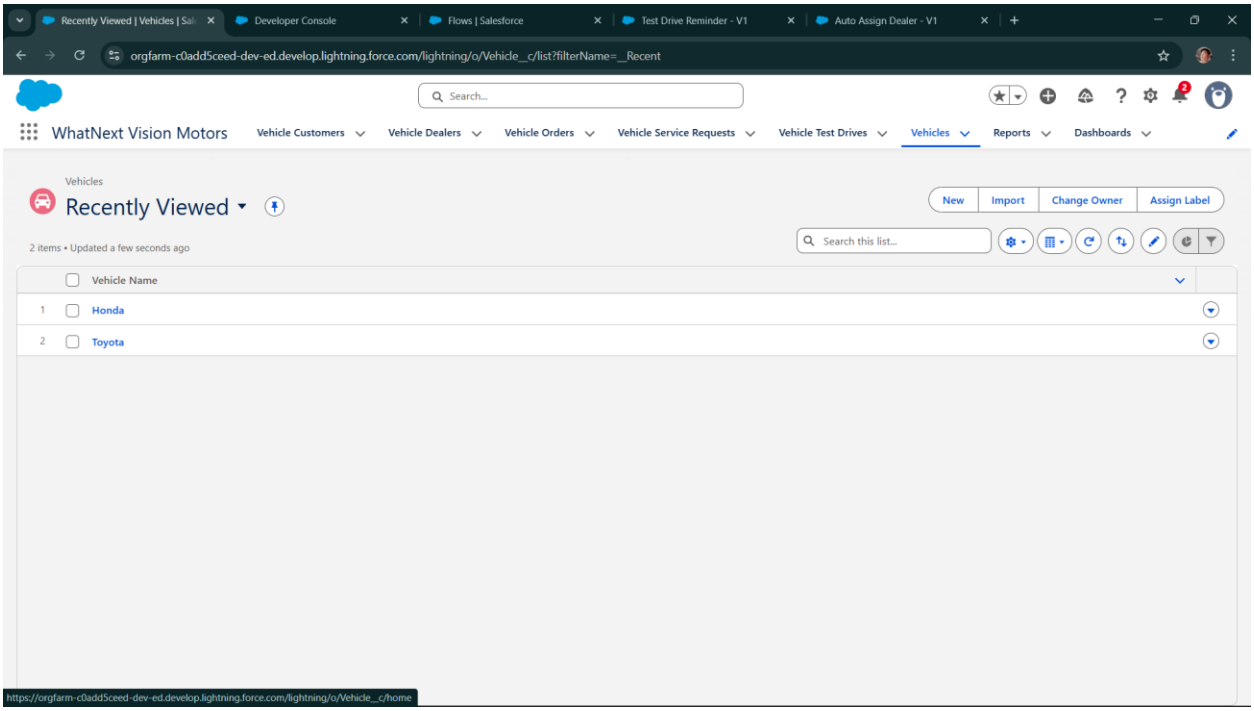
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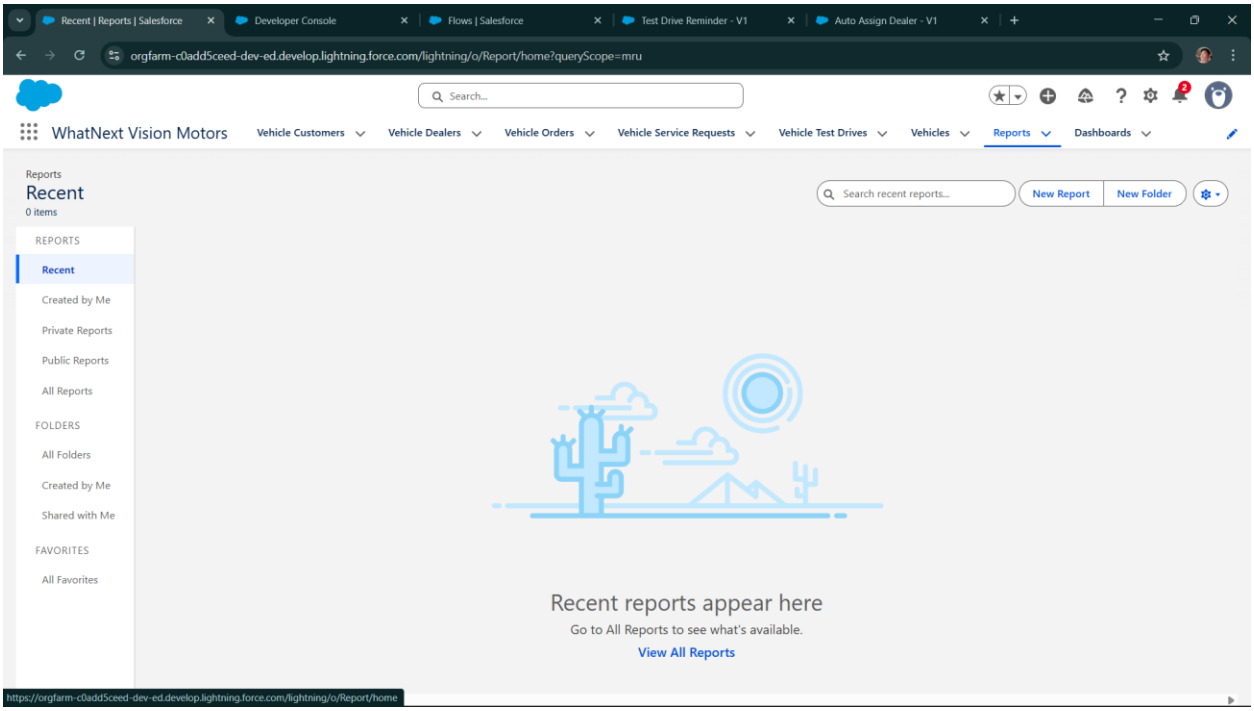
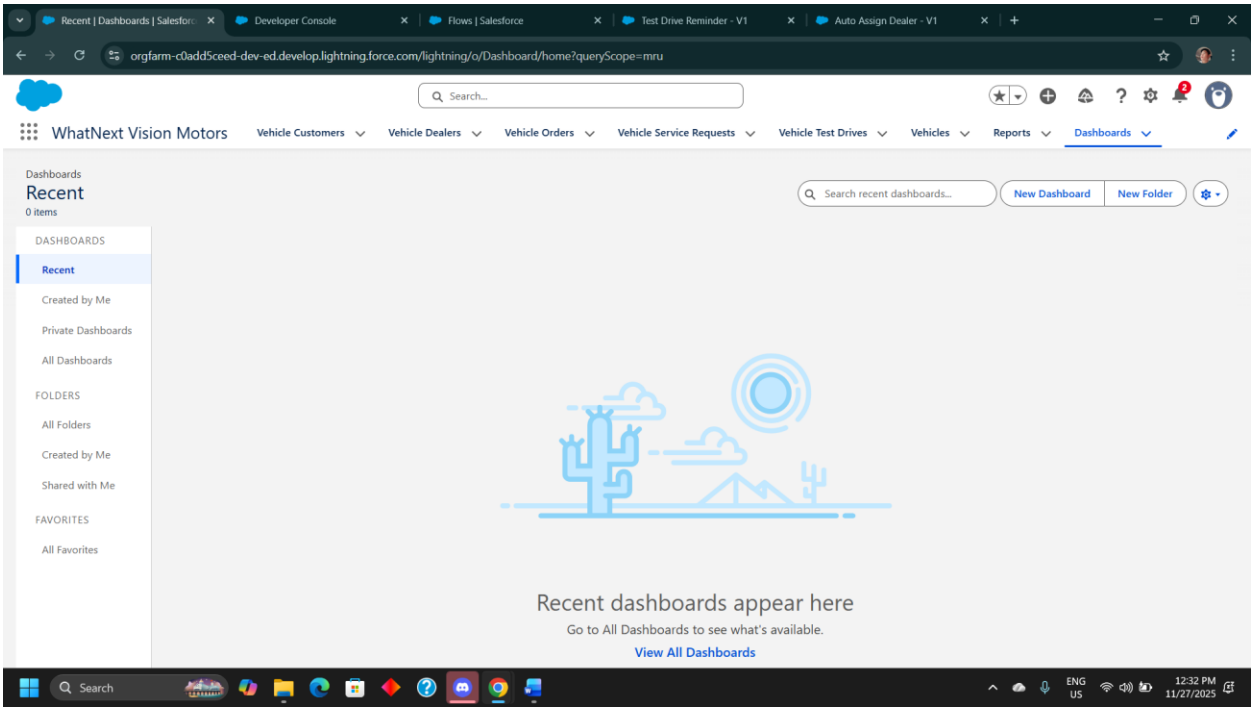
Test Drive Reminder - V1
Auto Assign Dealer - V1
orgfarm-c0add5ceed-dev-ed.develop.lightning.force.com/lightning/o/Vehicle__c/list?filterName=__Recent
Search...
WhatNext Vision Motors
Vehicle Customers
Vehicle Dealers
Vehicle Orders
Vehicle Service Requests
Vehicle Test Drives
Vehicles
Reports
Dashboards
Vehicles
Recently Viewed
New
Import
Change Owner
Assign Label
2 items • Updated a few seconds ago
Search this list...
Vehicle Name
1 Honda
2 Toyota
https://orgfarm-c0add5ceed-dev-ed.develop.lightning.force.com/lightning/o/Vehicle__c/home


Recent | Reports | Salesforce
Developer Console
Flows | Salesforce
Test Drive Reminder - V1
Auto Assign Dealer - V1
orgfarm-c0add5ceed-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru
Search...
WhatNext Vision Motors
Vehicle Customers
Vehicle Dealers
Vehicle Orders
Vehicle Service Requests
Vehicle Test Drives
Vehicles
Reports
Dashboards
Reports
Recent
0 items
Search recent reports...
New Report
New Folder
REPORTS
Recent
Created by Me
Private Reports
Public Reports
All Reports
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites
Recent reports appear here
Go to All Reports to see what's available.
View All Reports
https://orgfarm-c0add5ceed-dev-ed.develop.lightning.force.com/lightning/o/Report/home


Recent | Dashboards | Salesforce
Developer Console
Flows | Salesforce
Test Drive Reminder - V1
Auto Assign Dealer - V1
orgfarm-c0add5ceed-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru
Search...
WhatNext Vision Motors
Vehicle Customers
Vehicle Dealers
Vehicle Orders
Vehicle Service Requests
Vehicle Test Drives
Vehicles
Reports
Dashboards
Dashboards
Recent
0 items
Search recent dashboards...
New Dashboard
New Folder
DASHBOARDS
Recent
Created by Me
Private Dashboards
All Dashboards
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites
Recent dashboards appear here
Go to All Dashboards to see what's available.
View All Dashboards
Search
ENG
US
12:32 PM
11/27/2025

Phase 4:Data Migration, Testing & Security

Mention the data loading process (e.g., Data Import Wizard, Data Loader).

- Sample customer, dealer, and vehicle records were added. Records were created manually in Salesforce, but larger datasets can be imported using the Data Import Wizard or Data Loader for easy bulk uploads without coding.

Field History Tracking, Duplicate Rules, Matching Rules should be documented.

Enabled for:

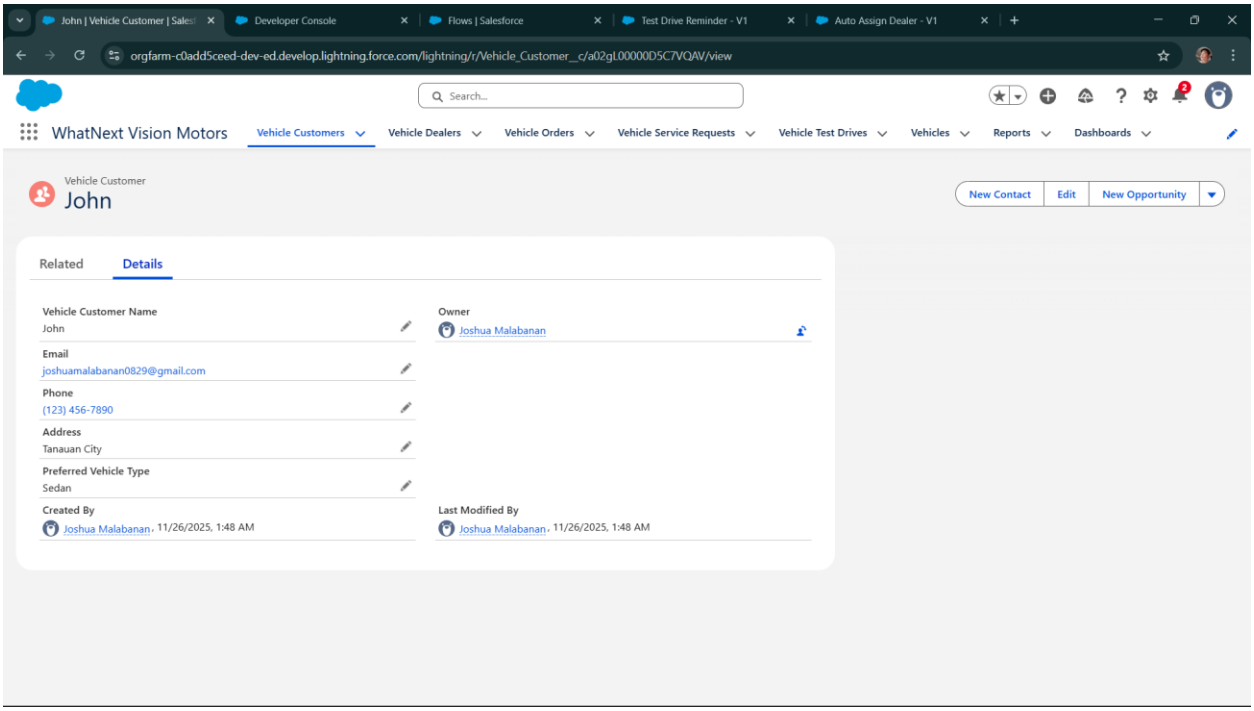
- Stock_Quantity__c
- Status__c
- Order_Date__c

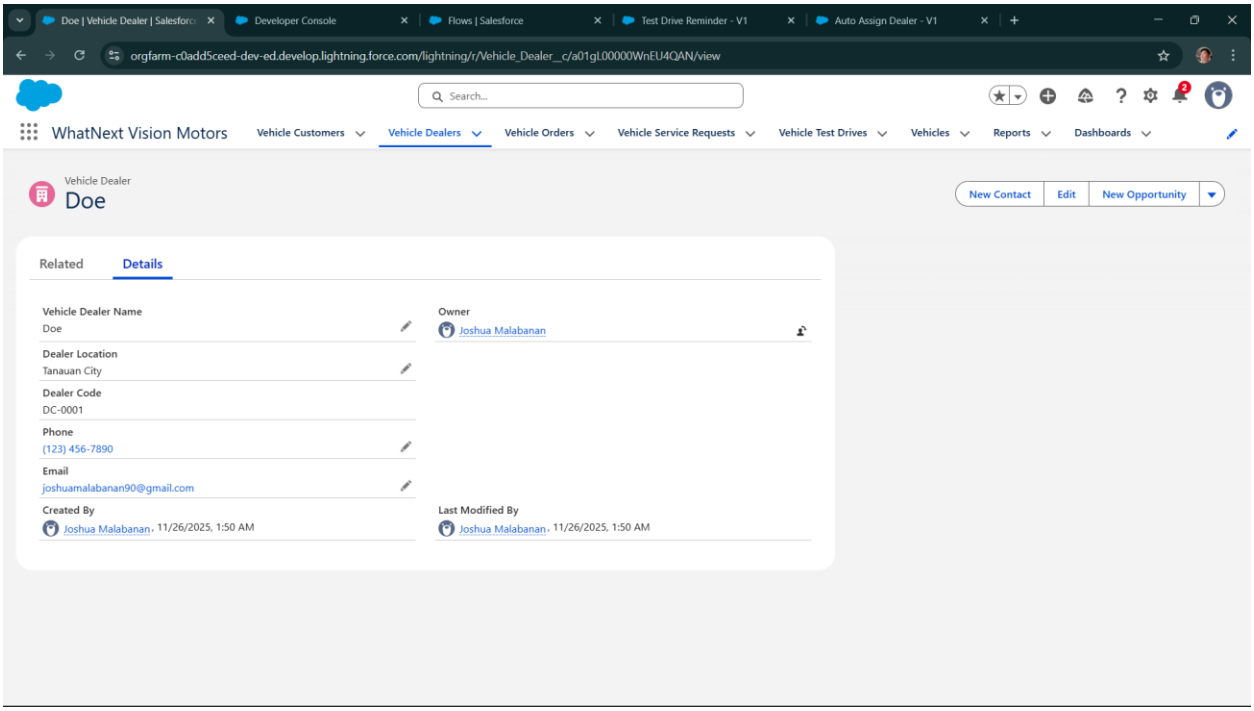
Profiles, Roles and Role Hierarchy, Permission sets, Sharing Rules.

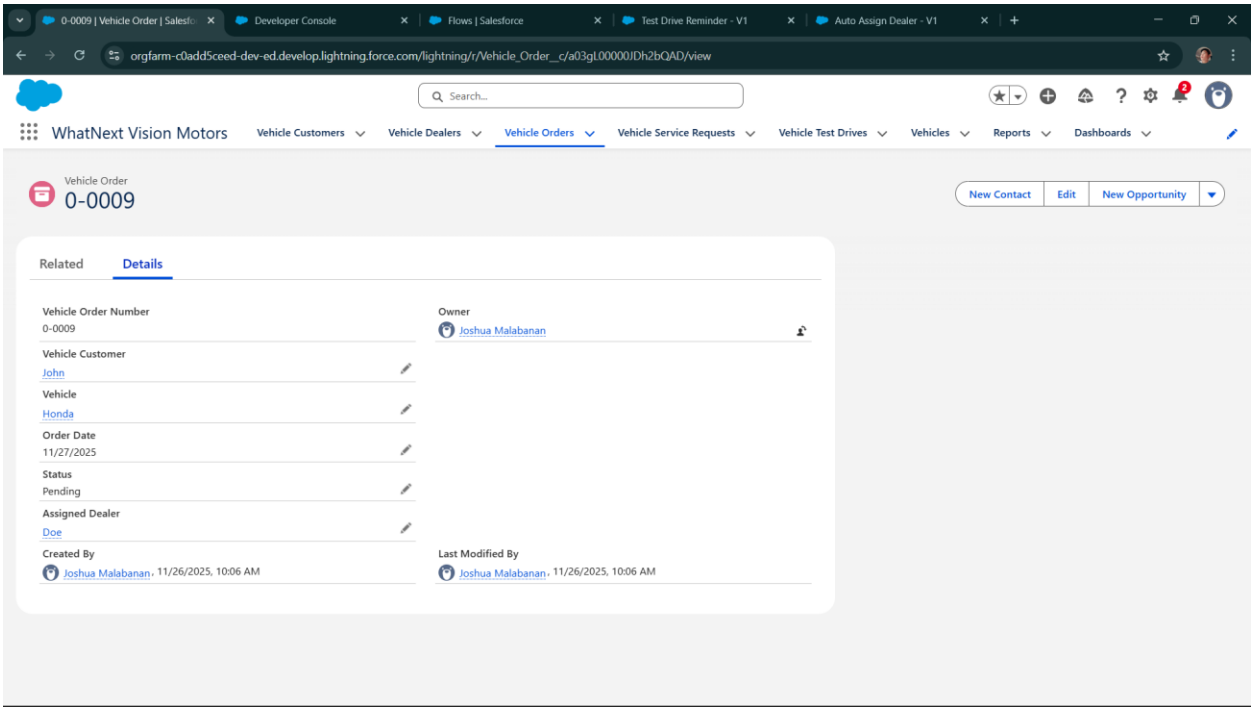
- Security was set up to control who can access data. Profiles handled basic permissions, roles let managers see their team's records, Permission Sets gave extra access, and Sharing Rules made sure sales teams only saw what they needed.

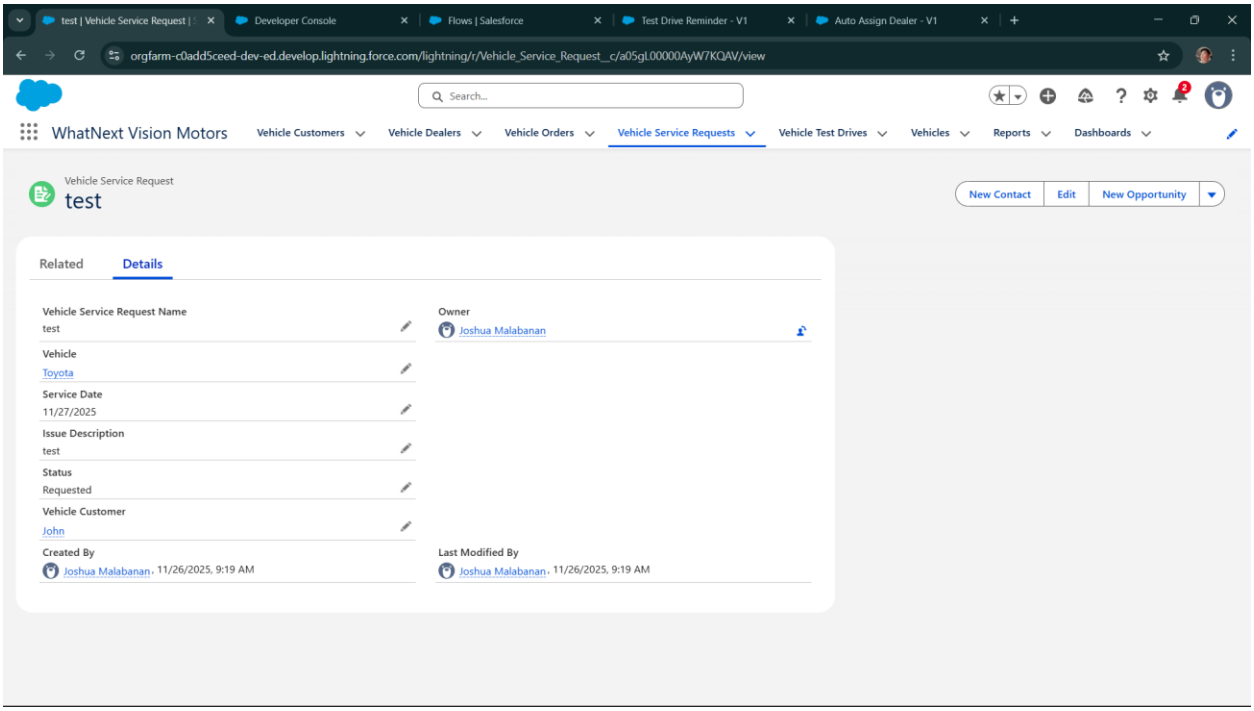
Creation of Test Classes

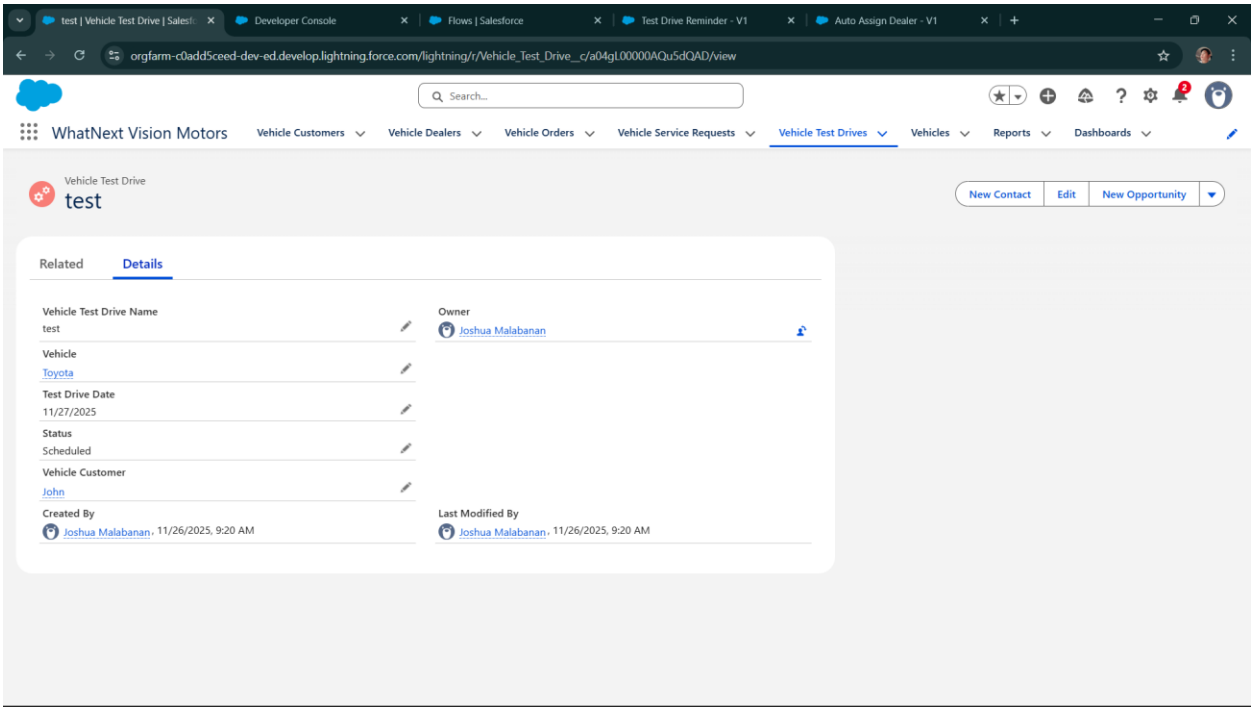
- All automations were tested to ensure they worked correctly. Dealer assignments and test drive reminders were validated, triggers prevented out-of-stock orders and updated stock on confirmation, and Batch Apex successfully auto-confirmed pending orders when stock was available.

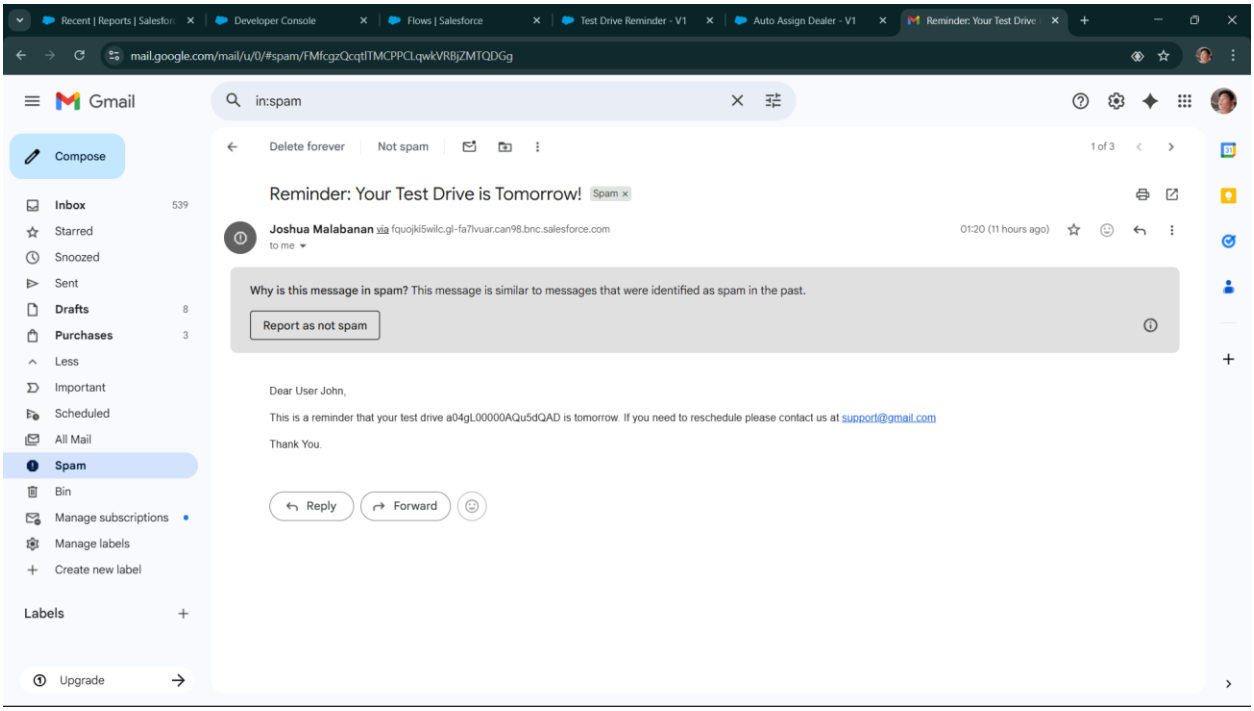

John | Vehicle Customer | Sales
Developer Console
Flows | Salesforce
Test Drive Reminder - V1
Auto Assign Dealer - V1
orgfarm-c0add5ceed-dev-ed.develop.lightning.force.com/lightning/r/Vehicle_Customer__c/a02gL00000D5C7VQAV/view
Search...
WhatNext Vision Motors
Vehicle Customers
Vehicle Dealers
Vehicle Orders
Vehicle Service Requests
Vehicle Test Drives
Vehicles
Reports
Dashboards
Vehicle Customer
John
New Contact
Edit
New Opportunity
Related
Details
Vehicle Customer Name
John
Owner
Joshua Malabanan
Email
joshuamalabanan0829@gmail.com
Phone
(123) 456-7890
Address
Tanauan City
Preferred Vehicle Type
Sedan
Created By
Joshua Malabanan, 11/26/2025, 1:48 AM
Last Modified By
Joshua Malabanan, 11/26/2025, 1:48 AM

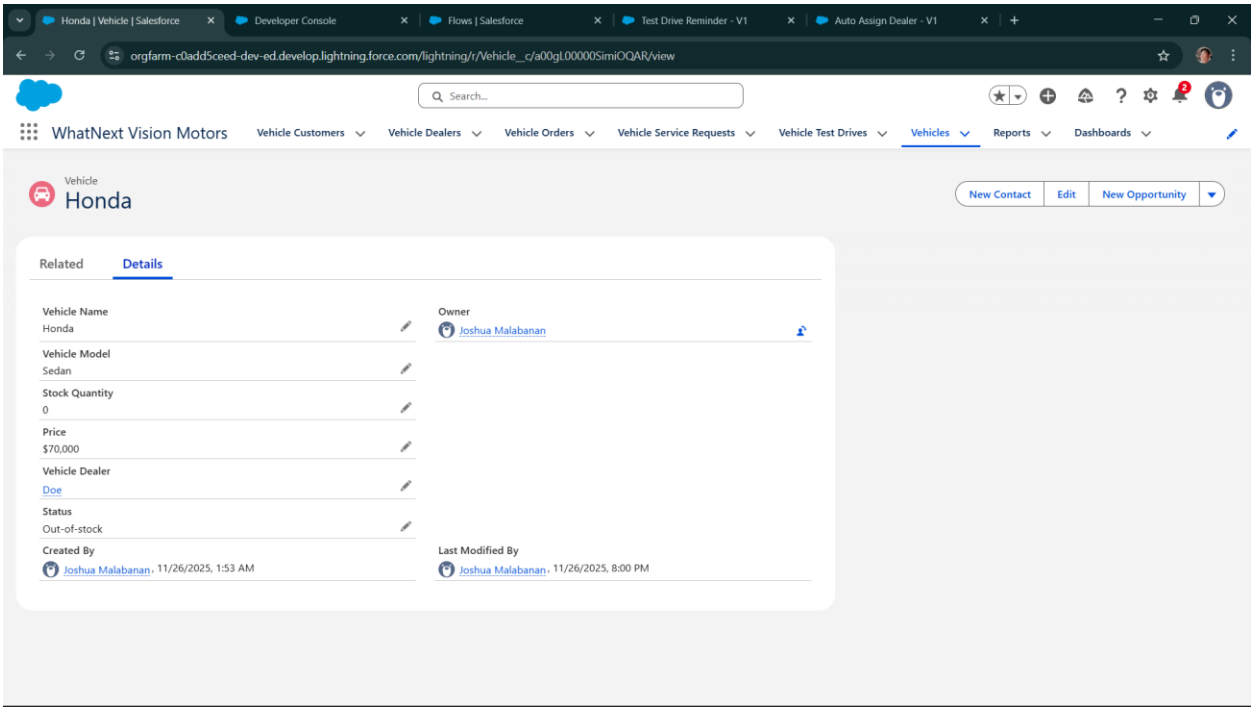

Doe | Vehicle Dealer | Salesforce
Developer Console
Flows | Salesforce
Test Drive Reminder - V1
Auto Assign Dealer - V1
orgfarm-c0add5ceed-dev-ed.develop.lightning.force.com/lightning/r/Vehicle_Dealer__c/a01gL00000WnEU4QAN/view
Search...
WhatNext Vision Motors
Vehicle Customers
Vehicle Dealers
Vehicle Orders
Vehicle Service Requests
Vehicle Test Drives
Vehicles
Reports
Dashboards
Vehicle Dealer
Doe
New Contact
Edit
New Opportunity
Related
Details
Vehicle Dealer Name
Doe
Owner
Joshua Malabanan
Dealer Location
Tanauan City
Dealer Code
DC-0001
Phone
(123) 456-7890
Email
joshuamalabanan90@gmail.com
Created By
Joshua Malabanan, 11/26/2025, 1:50 AM
Last Modified By
Joshua Malabanan, 11/26/2025, 1:50 AM

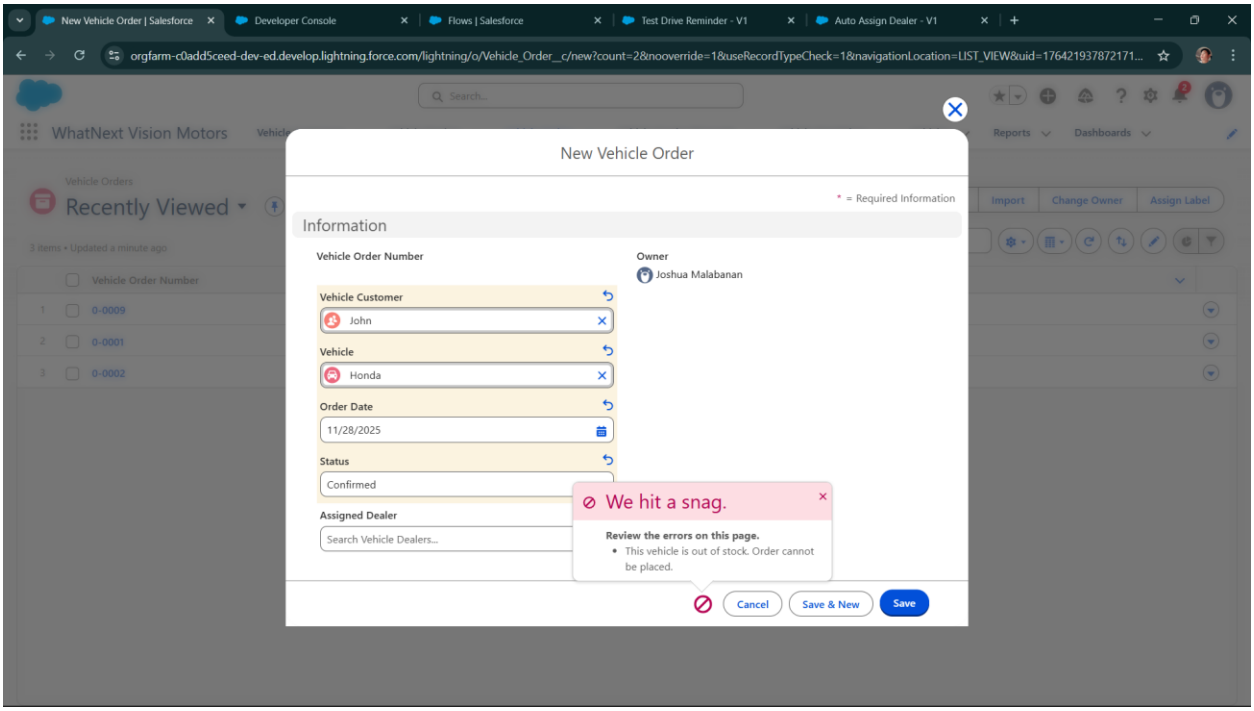

0-0009 | Vehicle Order | Salesfo
Developer Console
Flows | Salesforce
Test Drive Reminder - V1
Auto Assign Dealer - V1
orgfarm-c0add5ceed-dev-ed.develop.lightning.force.com/lightning/r/Vehicle_Order__c/a03gL00000JDh2bQAD/view
Search...
WhatNext Vision Motors
Vehicle Customers
Vehicle Dealers
Vehicle Orders
Vehicle Service Requests
Vehicle Test Drives
Vehicles
Reports
Dashboards
Vehicle Order
0-0009
New Contact
Edit
New Opportunity
Related
Details
Vehicle Order Number
0-0009
Owner
Joshua Malabanan
Vehicle Customer
John
Vehicle
Honda
Order Date
11/27/2025
Status
Pending
Assigned Dealer
Doe
Created By
Joshua Malabanan, 11/26/2025, 10:06 AM
Last Modified By
Joshua Malabanan, 11/26/2025, 10:06 AM


test | Vehicle Service Request |
Developer Console
Flows | Salesforce
Test Drive Reminder - V1
Auto Assign Dealer - V1
orgfarm-c0add5ceed-dev-ed.develop.lightning.force.com/lightning/r/Vehicle_Service_Request__c/a05gL00000AyW7KQAV/view
Search...
WhatNext Vision Motors
Vehicle Customers
Vehicle Dealers
Vehicle Orders
Vehicle Service Requests
Vehicle Test Drives
Vehicles
Reports
Dashboards
Vehicle Service Request
test
New Contact
Edit
New Opportunity
Related
Details
Vehicle Service Request Name
test
Owner
Joshua Malabanan
Vehicle
Toyota
Service Date
11/27/2025
Issue Description
test
Status
Requested
Vehicle Customer
John
Created By
Joshua Malabanan, 11/26/2025, 9:19 AM
Last Modified By
Joshua Malabanan, 11/26/2025, 9:19 AM


test | Vehicle Test Drive | Salesf
Developer Console
Flows | Salesforce
Test Drive Reminder - V1
Auto Assign Dealer - V1
orgfarm-c0add5ceed-dev-ed.develop.lightning.force.com/lightning/r/Vehicle_Test_Drive__c/a04gL00000AQu5dQAD/view
Search...
WhatNext Vision Motors
Vehicle Customers
Vehicle Dealers
Vehicle Orders
Vehicle Service Requests
Vehicle Test Drives
Vehicles
Reports
Dashboards
Vehicle Test Drive
test
New Contact
Edit
New Opportunity
Related
Details
Vehicle Test Drive Name
test
Owner
Joshua Malabanan
Vehicle
Toyota
Test Drive Date
11/27/2025
Status
Scheduled
Vehicle Customer
John
Created By
Joshua Malabanan, 11/26/2025, 9:20 AM
Last Modified By
Joshua Malabanan, 11/26/2025, 9:20 AM


Recent | Reports | Salesfor
Developer Console
Flows | Salesforce
Test Drive Reminder - V1
Auto Assign Dealer - V1
Reminder: Your Test Drive
mail.google.com/mail/u/0/#spam/FMfcgzQcqtlTMCPPCLqwkVRBjZMTQDGg
Gmail
in:spam
Compose
Inbox 539
Starred
Snoozed
Sent
Drafts 8
Purchases 3
Less
Important
Scheduled
All Mail
Spam
Bin
Manage subscriptions
Manage labels
Create new label
Labels
Upgrade
Delete forever
Not spam
1 of 3
Reminder: Your Test Drive is Tomorrow!
Spam
Joshua Malabanan via fquojki5wilc.gl-fa7ivuar.can98.bnc.salesforce.com
to me
01:20 (11 hours ago)
Why is this message in spam? This message is similar to messages that were identified as spam in the past.
Report as not spam
Dear User John,
This is a reminder that your test drive a04gL00000AQu5dQAD is tomorrow. If you need to reschedule please contact us at support@gmail.com
Thank You.
Reply
Forward


Honda | Vehicle | Salesforce
Developer Console
Flows | Salesforce
Test Drive Reminder - V1
Auto Assign Dealer - V1
orgfarm-c0add5ceed-dev-ed.develop.lightning.force.com/lightning/r/Vehicle__c/a00gL00000SimiOQAR/view
Search...
WhatNext Vision Motors
Vehicle Customers
Vehicle Dealers
Vehicle Orders
Vehicle Service Requests
Vehicle Test Drives
Vehicles
Reports
Dashboards
Vehicle
Honda
New Contact
Edit
New Opportunity
Related
Details
Vehicle Name
Honda
Vehicle Model
Sedan
Stock Quantity
0
Price
$70,000
Vehicle Dealer
Doe
Status
Out-of-stock
Created By
Joshua Malabanan, 11/26/2025, 1:53 AM
Owner
Joshua Malabanan
Last Modified By
Joshua Malabanan, 11/26/2025, 8:00 PM


New Vehicle Order | Salesforce
Developer Console
Flows | Salesforce
Test Drive Reminder - V1
Auto Assign Dealer - V1
orgfarm-c0add5ceed-dev-ed.develop.lightning.force.com/lightning/o/Vehicle_Order__c/new?count=2&nooverride=1&useRecordTypeCheck=1&navigationLocation=LIST_VIEW&uid=176421937872171...
WhatNext Vision Motors
Recently Viewed
New Vehicle Order
* = Required Information
Information
Vehicle Order Number
Owner
Joshua Malabanan
Vehicle Customer
John
Vehicle
Honda
Order Date
11/28/2025
Status
Confirmed
Assigned Dealer
Search Vehicle Dealers...
We hit a snag.
Review the errors on this page.
This vehicle is out of stock. Order cannot be placed.
Cancel
Save & New
Save

Phase 5:Deployment, Documentation & Maintenance

Explain the Deployment strategy (change sets or other methods).

All components were deployed with Change Sets, including:

- Custom objects
- Flows
- Apex classes and triggers
- Page layouts
- Reports and dashboards

Maintenance Plan

- Admin monitors scheduled jobs.
- Check vehicle stock weekly.
- Update flows and triggers when needed.
- Audit data and sharing settings every three months.

Troubleshooting Approach

- Check Debug Logs for issues.
- Review paused or failed flows.
- Look at Apex logs for errors.
- Use field history to track data problems.

Conclusion

WhatsNext Vision Motors is using Salesforce to improve customer experience and streamline operations. The system automatically suggests the nearest dealer and prevents orders for out-of-stock vehicles, ensuring accuracy. Automated processes also update order statuses, marking orders as 'Pending' if unavailable and 'Confirmed' if in stock. This project helps reduce errors, save time on manual tasks, and gives employees more time to focus on other tasks. It can be further enhanced using AI and modern technologies.