

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

### **Project Overview**

This project focuses on improving the car ordering system of “WhatNext Vision Motors” using Salesforce. The system is designed to make the ordering process easier, faster, and more reliable for customers. It automatically identifies the nearest dealer based on the customer’s address, helping them connect with the most convenient location. It also prevents customers from ordering vehicles that are out of stock, reducing confusion and ensuring a smoother experience. In addition, the system updates order statuses automatically by marking orders as “Pending” when a vehicle is unavailable and “Confirmed” when it is in stock. Overall, this project aims to enhance customer satisfaction, streamline operations, and support the company in delivering efficient and accurate service.

### **Objectives**

The main objective of this project is to improve the overall car ordering process for “WhatNext Vision Motors” by using Salesforce to create a more efficient and customer-friendly system. One goal is to help customers easily locate the nearest dealer based on their address, allowing them to receive faster and more convenient service. Another objective is to prevent customers from placing orders for vehicles that are out of stock, ensuring accuracy and reducing misunderstandings. The project also aims to automate the updating of order statuses so customers always know whether their order is pending or confirmed. By achieving these objectives, the project hopes to enhance customer satisfaction, reduce errors, and support smoother operations for the company.

## **Phase 1: Requirement Analysis & Planning**

### Understanding Business Requirements:

- This step focuses on identifying what users need and the problems they face in the current system. It helps the team understand what must be improved or added to make the system more effective.
- It involves gathering feedback from customers and staff to understand their experiences and expectations.
- The team analyzes issues such as delays, errors, or confusing processes that affect the current workflow.
- It helps create a clear list of features and solutions that the new system must include to meet business goals.

### Defining Project Scope and Objectives:

- This part explains what the project will include and what it aims to achieve so the team has a clear direction.
- It defines the specific features, functions, and requirements that must be completed within the project.
- It sets limits on what is not included to avoid extra work or confusion during development.
- It helps the team create measurable goals, making it easier to track progress and ensure the final result meets expectations.

### Design Data Model and Security Model:

- Vehicle\_\_c - stores key information and specifications about each vehicle in the system.
- Vehicle\_Dealer\_\_c - contains details about all authorized vehicle dealers and their profiles.
- Vehicle\_Customer\_\_c - holds the personal information and account profiles of customers.
- Vehicle\_Order\_\_c - manages and tracks customer purchase orders for vehicles.

- Vehicle\_Test\_Drive\_\_c - organizes, schedules, and records customer test drive appointments.
- Vehicle\_Service\_Request\_\_c - logs and monitors customer requests for vehicle servicing and maintenance.

#### Security Model Includes:

- User profiles that decide what each person is allowed to do in the system.
- A role hierarchy that shows levels of access based on position or responsibility.
- Permission sets that give extra access when needed without changing the profile.
- Sharing rules and history tracking that control record access and keep a record of important changes like stock, status, and email.

#### Stakeholders Mapping:

- This step identifies all people involved in the project or affected by the system.
- It helps determine who will use the system and who will make important decisions.
- It includes customers, dealers, employees, managers, and the development team.
- It ensures that every stakeholder's needs, expectations, and responsibilities are understood.
- It improves communication and helps the project team plan and work more effectively.

#### Execution RoadMap:

1. Data Structure Setup - Creating custom objects and relationships.
2. Security Configuration - Setting roles, permissions, and access controls.
3. Automation Development - Building triggers, flows, and scheduled processes.
4. User Interface Design - Creating Lightning pages and customizing layouts.

5. Integration Setup - Connecting the system with required external tools or data sources.
6. Testing and Review - Running system tests and validating performance before deployment.

## **Phase 2:Salesforce Development - Backend & Configurations**

### Environment Setup & DevOps Workflow

- Set up a dedicated Salesforce Developer Org to safely create and test custom objects, fields, flows, and Apex components.
- Managed all changes in an organized way using Change Sets to ensure smooth deployment between different environments.
- Used the Developer Console to write, debug, and test Apex classes and triggers efficiently.
- Built a structured DevOps workflow to support version control, prevent conflicts, and make testing and deployment more organized.

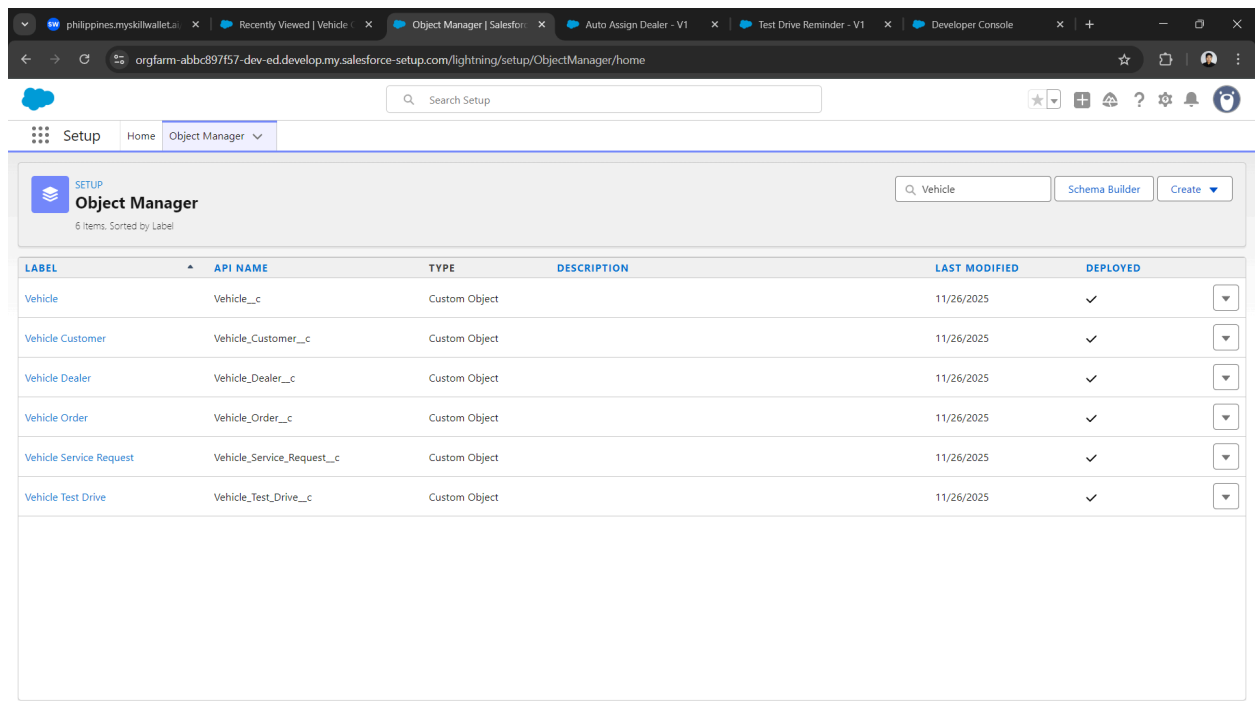
Customization of Objects, Fields, Validation Rules, Automation (Workflow Rules, Process Builder, Flows, Approval Process).

### Custom Objects Created:

- Vehicle\_\_c
- Vehicle\_Dealer\_\_c
- Vehicle\_Customer\_\_c
- Vehicle\_Order\_\_c
- Vehicle\_Test\_Drive\_\_c
- Vehicle\_Service\_Request\_\_c

## Key Fields in Each Object:

- Stock\_Quantity\_\_c - Keeps track of how many vehicles are available.
- Status\_\_c - Shows the current state of a record, like Pending or Confirmed.
- Dealer\_Location\_\_c - Indicates the location of the dealer handling the vehicle.
- Preferred\_Vehicle\_Type\_\_c - Shows the type of vehicle the customer prefers.
- Order\_Date\_\_c - Records the date when the order was placed.
- Test\_Drive\_Date\_\_c - Stores the scheduled date for the test drive.



The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager' tabs. Below this, the 'Object Manager' section is displayed, showing a list of custom objects. The table has columns for LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The objects listed are Vehicle, Vehicle Customer, Vehicle Dealer, Vehicle Order, Vehicle Service Request, and Vehicle Test Drive, all of which are Custom Objects and have been deployed.

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	✓

philippines.myskillwallet... x Recently Viewed | Vehicle x Vehicle | Salesforce x Auto Assign Dealer - V1 x Test Drive Reminder - V1 x Developer Console x + -

orgfarm-abb897f57-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01lgL000003CVM1/Details/view

Search Setup

Setup Home Object Manager

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
- Object Access

**Details** [Edit](#) [Delete](#)

Description

API Name  
Vehicle\_c

Custom  
✓

Singular Label  
Vehicle

Plural Label  
Vehicles

Enable Reports  
✓

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

philippines.myskillwallet... x Recently Viewed | Vehicle x Vehicle Customer | Salesforce x Auto Assign Dealer - V1 x Test Drive Reminder - V1 x Developer Console x + -

orgfarm-abb897f57-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01lgL000003CVPh/Details/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER  
**Vehicle Customer**

**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

**Details** [Edit](#) [Delete](#)

Description

API Name  
Vehicle\_Customer\_c

Custom  
✓

Singular Label  
Vehicle Customer

Plural Label  
Vehicle Customers

Enable Reports  
✓

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

Browser tabs: philippines.myskillwallet, Recently Viewed | Vehicle, Vehicle Dealer | Salesforce, Auto Assign Dealer - V1, Test Drive Reminder - V1, Developer Console

Address bar: orgfarm-abb897f57-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01lgL000003CV05/Details/view

Search Setup

Setup Home Object Manager

Vehicle Dealer

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

Details

Description

API Name  
Vehicle\_Dealer\_\_c

Custom  
✓

Singular Label  
Vehicle Dealer

Plural Label  
Vehicle Dealers

Enable Reports  
✓

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

Edit Delete

Browser tabs: philippines.myskillwallet, Recently Viewed | Vehicle, Vehicle Order | Salesforce, Auto Assign Dealer - V1, Test Drive Reminder - V1, Developer Console

Address bar: orgfarm-abb897f57-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01lgL000003CVXI/Details/view

Search Setup

Setup Home Object Manager

Vehicle Order

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

Details

Description

API Name  
Vehicle\_Order\_\_c

Custom  
✓

Singular Label  
Vehicle Order

Plural Label  
Vehicle Orders

Enable Reports  
✓

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

Edit Delete

philippines.myskillwallet...Recently Viewed | Vehicle | Vehicle Service Request | Auto Assign Dealer - V1 | Test Drive Reminder - V1 | Developer Console

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Search Setup

SetupHomeObject 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

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

EditDelete

philippines.myskillwallet...Recently Viewed | Vehicle | Vehicle Test Drive | Salesfo...Auto Assign Dealer - V1 | Test Drive Reminder - V1 | Developer Console

orgfarm-abb897f57-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01lgL000003CVhR/Details/view

Search Setup

SetupHomeObject Manager

SETUP > OBJECT MANAGER

Vehicle Test Drive

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

Details

Description

API Name  
Vehicle\_Test\_Drive\_\_c

Custom  
✓

Singular Label  
Vehicle Test Drive

Plural Label  
Vehicle Test Drives

Enable Reports  
✓

Track Activities

Track Field History

Deployment Status  
Deployed

Help Settings  
Standard salesforce.com Help Window

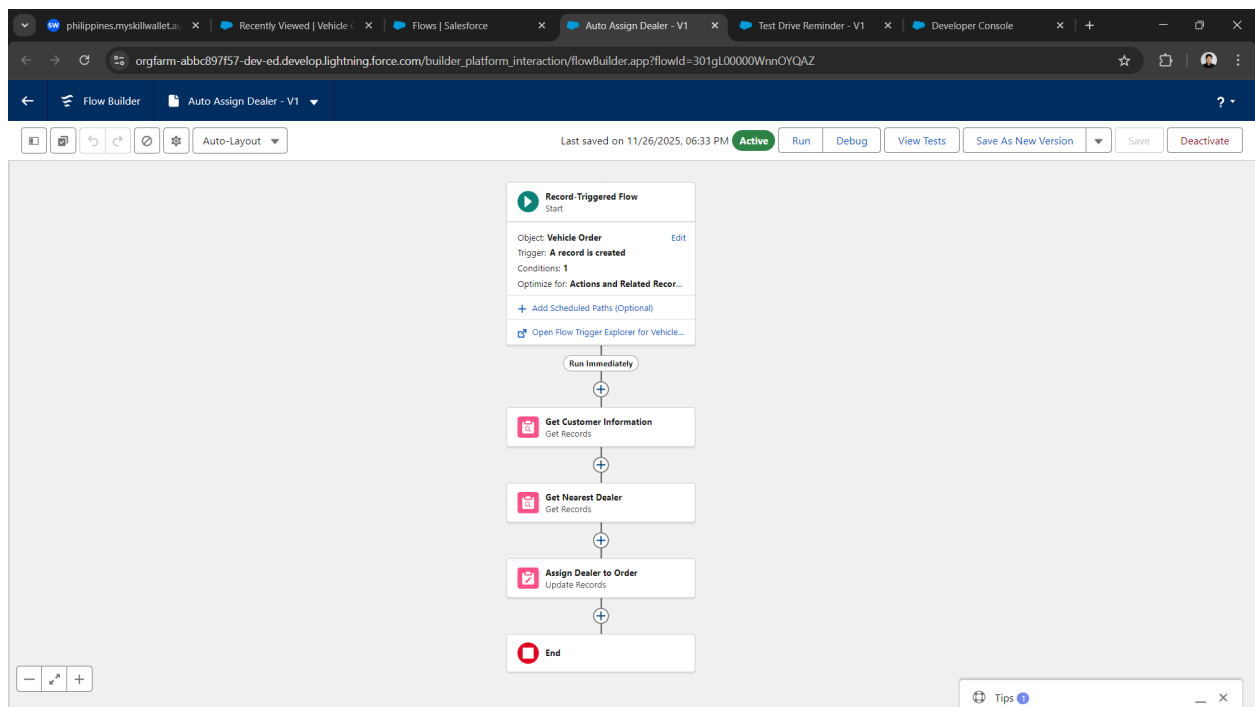
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# Automation

## 1. Auto Assign Dealer Flows

- The Auto-Assign Nearest Dealer flow is a smart tool that makes things easier for customers and the company. It starts automatically whenever a new Vehicle Order is made and the status is set to Pending. First, it looks at the customer's address from their Vehicle Customer record. Then, it checks all the Vehicle Dealer records to find the dealer that is closest to the customer. Once it finds the right dealer, it automatically updates the order to assign that dealer. This means no one has to do it by hand, customers get connected to a nearby dealer faster, mistakes are less likely, and orders get processed more quickly. Overall, it makes the whole experience smoother for everyone.



philippines.myskillwallet...O-0003 | Vehicle Order | S...Vehicle Test Drive | Salesfo...Auto Assign Dealer - V1...Test Drive Reminder - V1...Developer Console

orgfarm-abbcb897f57-dev-ed.develop.lightning.force.com/lightning/r/Vehicle\_Order\_\_c/a03gl00000IDKPxQAP/view

WhatNext Vision MotorsVehicle CustomersVehicle DealersVehicle OrdersVehicle Service RequestsVehicle Test DrivesVehiclesReportsDashboards

Vehicle OrderO-0003New ContactEditNew Opportunity

RelatedDetails

Vehicle Order Number	O-0003	Owner	Kent Mathew Derilo
Vehicle Customer	John		
Vehicle	Toyota		
Order Date	11/30/2025		
Status	Pending		
Assigned Dealer	Mateo		
Created By	Kent Mathew Derilo	Last Modified By	Kent Mathew Derilo
	11/26/2025, 7:28 AM		11/26/2025, 7:28 AM

philippines.myskillwallet...O-0002 | Vehicle Order | S...Vehicle Test Drive | Salesfo...Auto Assign Dealer - V1...Test Drive Reminder - V1...Developer Console

orgfarm-abbcb897f57-dev-ed.develop.lightning.force.com/lightning/r/Vehicle\_Order\_\_c/a03gl00000IDKgrQAD/view

WhatNext Vision MotorsVehicle CustomersVehicle DealersVehicle OrdersVehicle Service RequestsVehicle Test DrivesVehiclesReportsDashboards

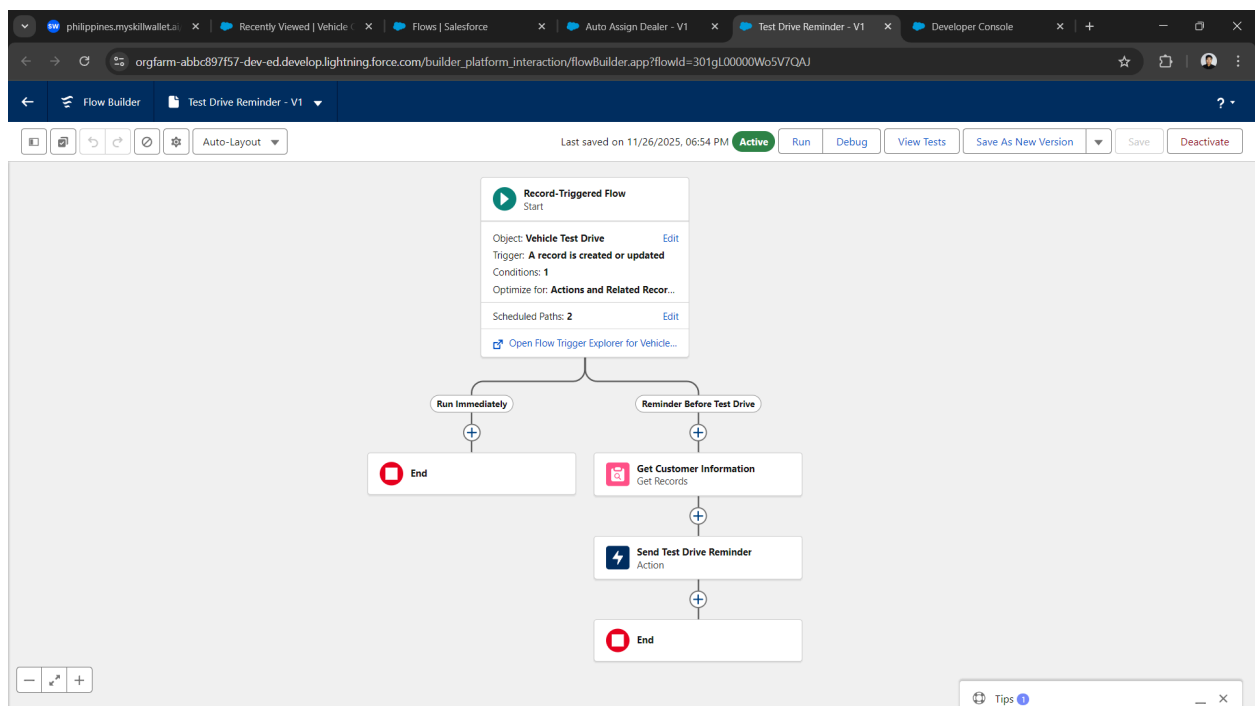
Vehicle OrderO-0002New ContactEditNew Opportunity

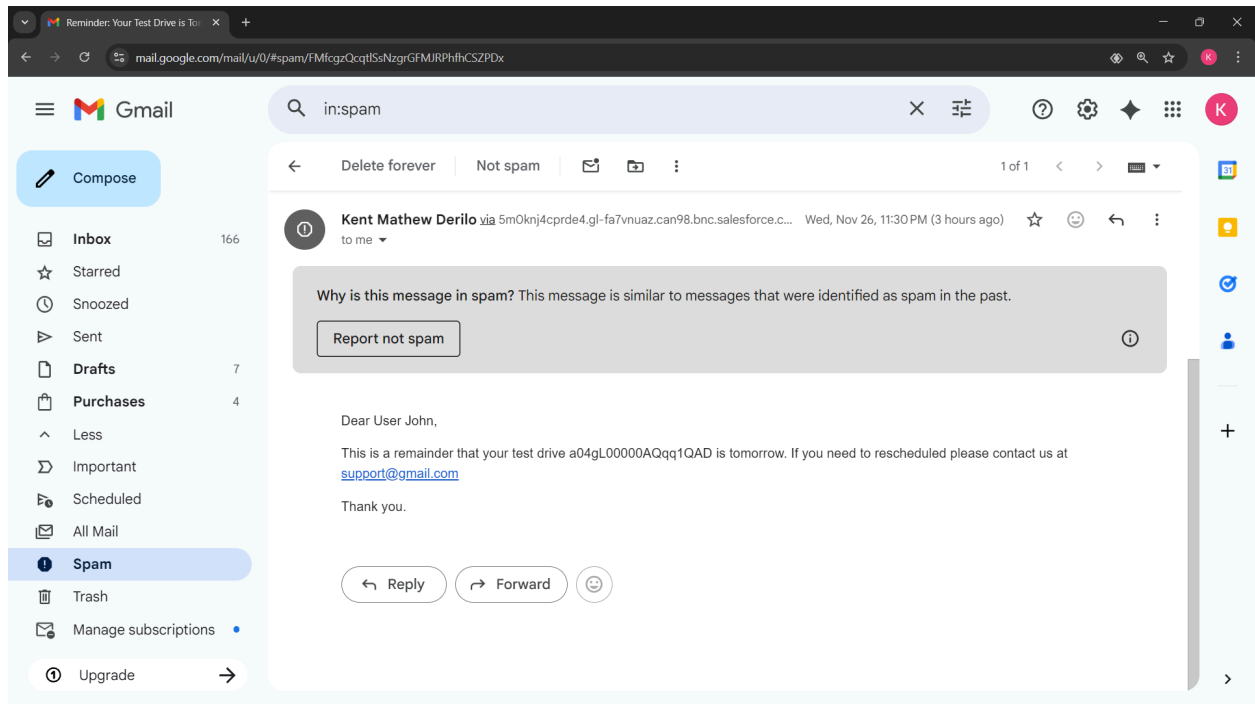
RelatedDetails

Vehicle Order Number	O-0002	Owner	Kent Mathew Derilo
Vehicle Customer	John		
Vehicle	Honda		
Order Date	11/27/2025		
Status	Confirmed		
Assigned Dealer			
Created By	Kent Mathew Derilo	Last Modified By	Kent Mathew Derilo
	11/26/2025, 3:14 AM		11/26/2025, 3:14 AM

## 2. Test Drive Reminder

- The Test Drive Reminder flow helps customers remember their test drives so they don't miss them. It starts automatically whenever a Vehicle Test Drive record is created or updated and the status is set to Scheduled. The flow is set to run 1 day before the test drive. It first gets the customer's email from their Vehicle Customer record and then sends them an automatic reminder email about their upcoming test drive. This makes it easier to keep in touch with customers, lowers the chances of no-shows, and makes the whole process smoother without staff having to do anything manually.

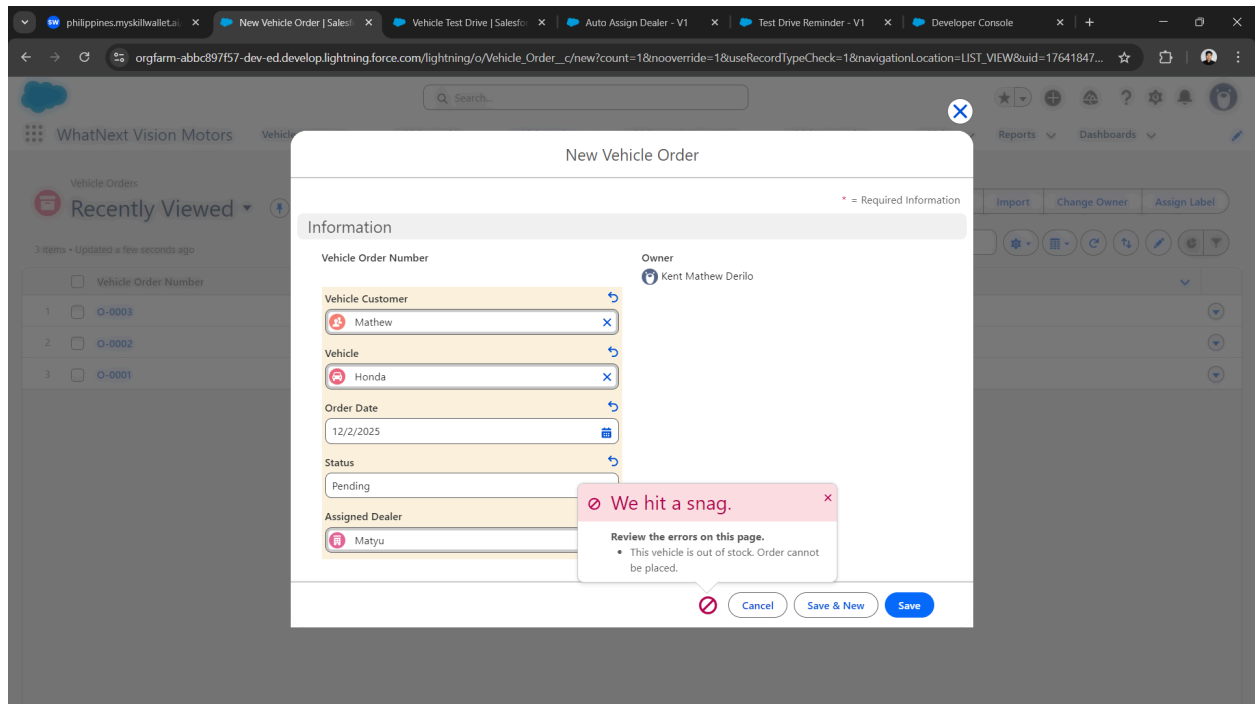




## Apex Classes and Triggers

### Apex Trigger Handler

- It stops customers from placing an order if the vehicle is out of stock and automatically lowers the stock count when an order is confirmed. This keeps everything accurate and saves time by handling these tasks automatically.



## Trigger

- This runs automatically before or after a Vehicle Order is added or updated to make sure everything is handled properly.

## Asynchronous Apex / Batch Apex

- This checks all pending orders. If the vehicle is back in stock, it updates the order to Confirmed and lowers the stock automatically.

## Scheduled Apex

- This sets the batch to run every day at a certain time so everything stays up to date without anyone having to do it manually.

```
File • Edit • Debug • Test • Workspace • Help • < >
VehicleOrderTriggerHandler.apac VehicleOrderBatch.apac VehicleOrderBatchScheduler.apac
Code Coverage: None API Version: 65
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    // ✗ 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()) {
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) {
28                Vehicle_c vehicle = vehicleStockMap.get(order.Vehicle_c);
29                if (vehicle != null && vehicle.Stock_Quantity_c <= 0) {
30                    order.addError('This vehicle is out of stock. Order cannot be placed.');
```

```
File • Edit • Debug • Test • Workspace • Help • < >
VehicleOrderTriggerHandler.apac VehicleOrderTrigger.apac VehicleOrderBatch.apac VehicleOrderBatchScheduler.apac
Code Coverage: None API Version: 65 Go To
1 trigger VehicleOrderTrigger on Vehicle_Order_c (before insert, before update, after insert, after update) {
2     VehicleOrderTriggerHandler.handleTrigger(Trieger.new, Trigger.oldMap, Trigger.isBefore, Trigger.isAfter, Trigger.isInsert, Trigger.isUpdate);
3 }

100% Tests Checkpoints Query Editor View State Progress Problems
Click here to view test log
```

```
File Edit Debug Test Workspace Help < >
VehicleOrderTriggerHandler.aspx VehicleOrderTrigger.aspx VehicleOrderBatch.aspx VehicleOrderBatchScheduler.aspx
Code Coverage: None API Version: 65
1 global class VehicleOrderBatch implements Database.Batchable<Object> {
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             List<Vehicle__c> vehiclesToUpdate = new List<Vehicle__c>();
24
25             for (Vehicle_Order__c order : orderList) {
26                 Vehicle__c vehicle = vehicleStockMap.get(order.Vehicle__c);
27                 if (vehicle != null && vehicle.Stock_Quantity__c > 0) {
28                     order.Status__c = 'Confirmed';
29                     vehicle.Stock_Quantity__c -= 1;
30                     ordersToUpdate.add(order);
31                     vehiclesToUpdate.add(vehicle);
32                 }
33             }
34
35             if (!ordersToUpdate.isEmpty()) update ordersToUpdate;
36             if (!vehiclesToUpdate.isEmpty()) update vehiclesToUpdate;
37         }
38     }
39
40     global void finish(Database.BatchableContext bc) {
41         System.debug('Vehicle order batch job completed.');
```

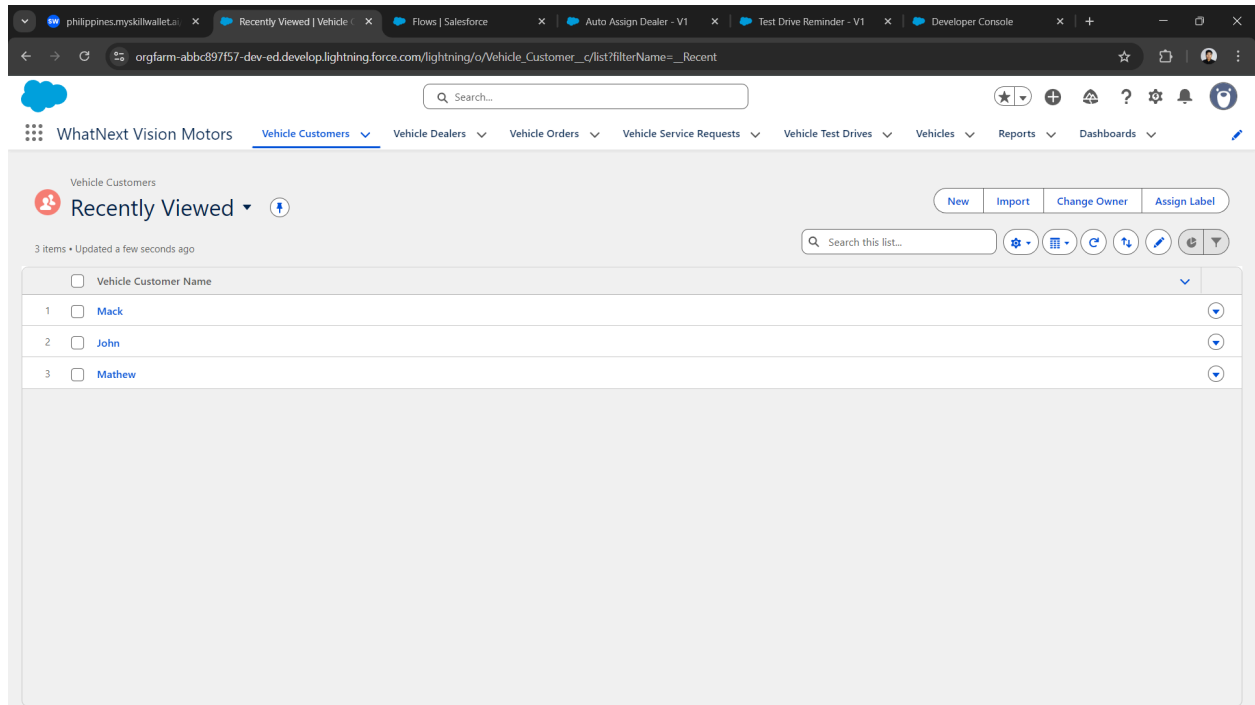
```
File Edit Debug Test Workspace Help < >
VehicleOrderTriggerHandler.aspx VehicleOrderTrigger.aspx VehicleOrderBatch.aspx VehicleOrderBatchScheduler.aspx
Code Coverage: None API Version: 65 Go To
1 global class VehicleOrderBatchScheduler implements Schedulable {
2     global void execute(SchedulableContext sc) {
3         VehicleOrderBatch batchJob = new VehicleOrderBatch();
4         Database.executeBatch(batchJob, 50); // 50 = batch size
5     }
6 }

Logs Tests Checkpoints Query Editor View State Progress Problems
Filter Click here to filter the log list
```

## Phase 3: UI/UX Development & Customization

### Lightning App Setup “WhatsNext Vision Motors”

Navigation Items: Vehicles, Vehicle Dealers, Vehicle Customers, Vehicle Orders, Vehicle Test Drives, Vehicle Service Request, Reports, Dashboards



### Page Layouts & Dynamic Forms

The page layouts are customized for each object so users see what they need. Different fields show up depending on the user’s role, and some fields only appear when certain conditions are met. This makes the pages easier to use and keeps things organized.

### User Management

- Gave users profiles, like System Administrator.
- Set up which apps each user can access.



## Reports and Dashboards

- Vehicle Stock Report - Shows how many vehicles are available.
- Dealer Assignment Report - Shows which dealer is assigned to each order.
- Test Drive Summary - Summarizes all scheduled and completed test drives.

## Lightning Pages

- Made custom pages for Vehicle, Dealer, and Customer records.
- Added related lists and quick action buttons to make pages easier to use.

The screenshot displays a Salesforce Lightning interface for a custom page titled 'Vehicle Customers'. The page features a navigation bar with various tabs including 'Vehicle Customers', 'Vehicle Dealers', 'Vehicle Orders', 'Vehicle Service Requests', 'Vehicle Test Drives', 'Vehicles', 'Reports', and 'Dashboards'. The 'Vehicle Customers' tab is active, showing a 'Recently Viewed' section with a list of three items: 'Mack', 'John', and 'Mathew'. Each item is preceded by a checkbox and followed by a dropdown arrow. The list is titled 'Vehicle Customer Name' and includes a search bar and several action buttons (New, Import, Change Owner, Assign Label) at the top right. The page also shows a search bar and a list of items with checkboxes and dropdown arrows.

	Vehicle Customer Name	
1	<input type="checkbox"/> Mack	▼
2	<input type="checkbox"/> John	▼
3	<input type="checkbox"/> Mathew	▼

Browser tabs: philippines.myskillwallet, Recently Viewed | Vehicle, Vehicle Test Drive | Salesfo, Auto Assign Dealer - V1, Test Drive Reminder - V1, Developer Console

Address bar: orgfarm-abb897f57-dev-ed.develop.lightning.force.com/lightning/o/Vehicle\_Dealer\_c/list?filterName=\_\_Recent

Search: Search...

Navigation: WhatNext Vision Motors, Vehicle Customers, **Vehicle Dealers**, Vehicle Orders, Vehicle Service Requests, Vehicle Test Drives, Vehicles, Reports, Dashboards

Vehicle Dealers

Recently Viewed

2 items • Updated a few seconds ago

Search this list...

Buttons: New, Import, Change Owner, Assign Label

<input type="checkbox"/>	Vehicle Dealer Name	
1 <input type="checkbox"/>	Matyu	
2 <input type="checkbox"/>	Mateo	

Browser tabs: philippines.myskillwallet, Recently Viewed | Vehicle, Vehicle Test Drive | Salesfo, Auto Assign Dealer - V1, Test Drive Reminder - V1, Developer Console

Address bar: orgfarm-abb897f57-dev-ed.develop.lightning.force.com/lightning/o/Vehicle\_Order\_c/list?filterName=\_\_Recent

Search: Search...

Navigation: WhatNext Vision Motors, Vehicle Customers, Vehicle Dealers, **Vehicle Orders**, Vehicle Service Requests, Vehicle Test Drives, Vehicles, Reports, Dashboards

Vehicle Orders

Recently Viewed

3 items • Updated a few seconds ago

Search this list...

Buttons: New, Import, Change Owner, Assign Label

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

philippines.myskillwallet... x Recently Viewed | Vehicle x Vehicle Test Drive | Salesfo... x Auto Assign Dealer - V1 x Test Drive Reminder - V1 x Developer Console x + - □ x

orgfarm-abb897f57-dev-ed.develop.lightning.force.com/lightning/o/Vehicle\_Service\_Request\_\_c/list?filterName=\_\_Recent

WhatNext Vision Motors Vehicle Customers Vehicle Dealers Vehicle Orders Vehicle Service Requests Vehicle Test Drives Vehicles Reports Dashboards

Vehicle Service Requests

Recently Viewed

0 items • Updated a few seconds ago

New Import Change Owner Assign Label

Search this list...

Nothing to see here

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

philippines.myskillwallet... x Recently Viewed | Vehicle x Vehicle Test Drive | Salesfo... x Auto Assign Dealer - V1 x Test Drive Reminder - V1 x Developer Console x + - □ x

orgfarm-abb897f57-dev-ed.develop.lightning.force.com/lightning/o/Vehicle\_Test\_Drive\_\_c/list?filterName=\_\_Recent

WhatNext Vision Motors Vehicle Customers Vehicle Dealers Vehicle Orders Vehicle Service Requests Vehicle Test Drives Vehicles Reports Dashboards

Vehicle Test Drives

Recently Viewed

2 items • Updated a few seconds ago

New Import Change Owner Assign Label

Search this list...

	Vehicle Test Drive Name	
1	<a href="#">Erick</a>	
2	<a href="#">xyz</a>	

Browser tabs: philippines.myskillwallet, Recently Viewed | Vehicles, Vehicle Test Drive | Salesfo, Auto Assign Dealer - V1, Test Drive Reminder - V1, Developer Console

Address bar: orgfarm-abb897f57-dev-ed.develop.lightning.force.com/lightning/o/Vehicle\_c/list?filterName=\_Recent

WhatNext Vision Motors

Vehicles

Recently Viewed

2 items • Updated a few seconds ago

Search this list...

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

Browser tabs: philippines.myskillwallet, Recent | Reports | Salesfo, Vehicle Test Drive | Salesfo, Auto Assign Dealer - V1, Test Drive Reminder - V1, Developer Console

Address bar: orgfarm-abb897f57-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mr

WhatNext Vision Motors

Reports

Recent

0 items

REPORTS

- Recent
- Created by Me
- Private Reports
- Public Reports
- All Reports

FOLDERS


- All Folders
- Created by Me
- Shared with Me

FAVORITES

- All Favorites

Search recent reports...

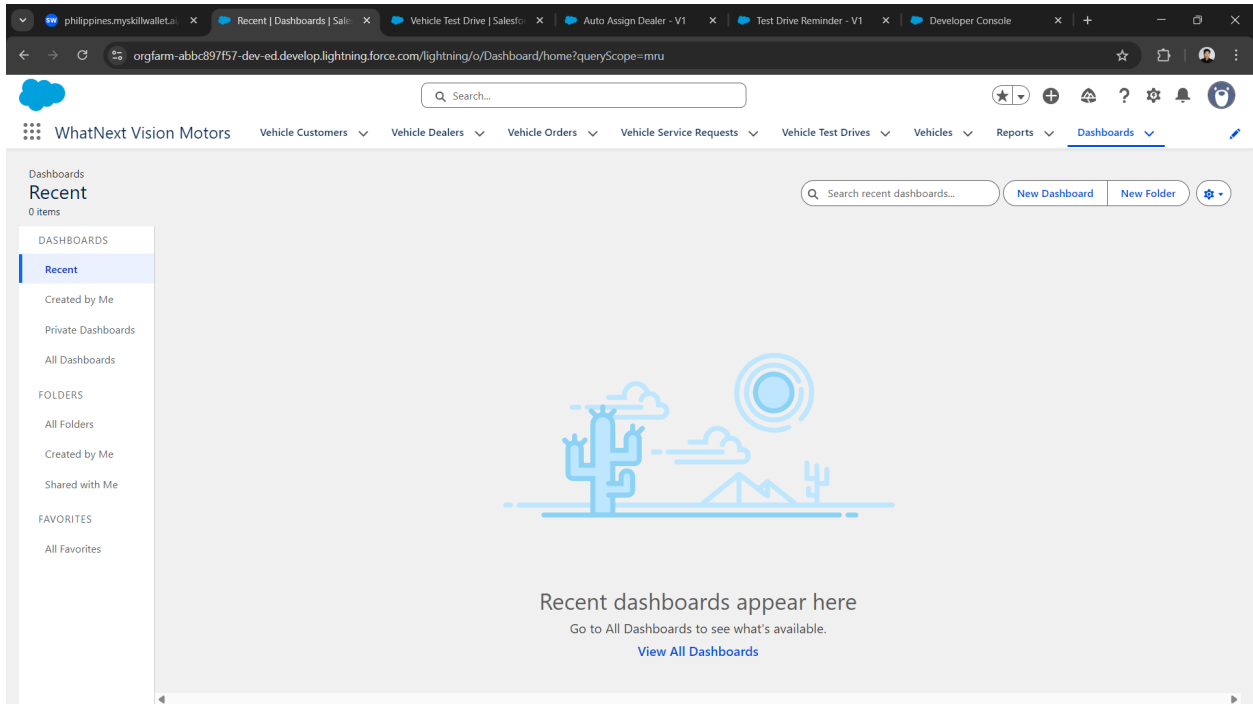
New Report New Folder



Recent reports appear here

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## Phase 4: Data Migration, Testing & Security

### Data Loading Process

Sample records for customers, dealers, and vehicles were manually created to support testing activities. Additionally, Salesforce provides data management tools, such as the Data Import Wizard and Data Loader, which enable bulk uploading of records without requiring any custom development.

### Security Configurations

The security configuration ensures that users can access only the information relevant to their roles. Profiles define fundamental permission levels, while the role hierarchy allows managers to view records owned by their subordinates. Permission sets provide additional access for specific functionalities, such as reminders and reports. Furthermore, sharing rules ensure that sales teams can only view the data necessary for their responsibilities.

### Field History Tracking

Enabled for:

Stock\_Quantity\_C

Status\_C

Order\_Date\_C

## Testing Process

The testing made sure everything in the system worked correctly. Flow tests checked that automations ran as expected, like dealer assignments and test drive reminders. Trigger tests confirmed that trying to order an out-of-stock vehicle showed an error and that confirming an order automatically lowered the stock. Apex tests verified that pending orders were automatically confirmed once the stock was updated.

The screenshot displays a Salesforce Lightning interface for a 'Vehicle Customer' record named 'Mathew'. The browser address bar shows a Lightning component URL. The navigation bar includes tabs for 'Vehicle Customers', 'Vehicle Dealers', 'Vehicle Orders', 'Vehicle Service Requests', 'Vehicle Test Drives', 'Vehicles', 'Reports', and 'Dashboards'. The record details are as follows:

Field	Value
Vehicle Customer Name	Mathew
Owner	Kent Mathew Derilo
Email	kentderilopupstc1@gmail.com
Phone	(123) 456-7890
Address	Sto. Tomas City
Preferred Vehicle Type	EV
Created By	Kent Mathew Derilo - 11/26/2025, 4:13 AM
Last Modified By	Kent Mathew Derilo - 11/26/2025, 4:14 AM

Browser tabs: philippines.myskillwallet, Mateo | Vehicle Dealer | Sales, Vehicle Test Drive | Sales, Auto Assign Dealer - V1, Test Drive Reminder - V1, Developer Console

Address bar: orgfarm-abc897f57-dev-ed.develop.lightning.force.com/lightning/r/Vehicle\_Dealer\_c/a01gtL00000WniezQAB/view

Search: Search...

WhatNext Vision Motors

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

Vehicle Dealer

Mateo

New Contact Edit New Opportunity

Related Details

Vehicle Dealer Name	Mateo	Owner	Kent Mathew Derilo
Dealer Location	Sto. Tomas City		
Dealer Code	DC-0001		
Phone	(123) 456-7890		
Email	mateo@gmail.com		
Created By	Kent Mathew Derilo 11/26/2025, 2:06 AM	Last Modified By	Kent Mathew Derilo 11/26/2025, 2:06 AM

Browser tabs: philippines.myskillwallet, O-0001 | Vehicle Order | Sales, Vehicle Test Drive | Sales, Auto Assign Dealer - V1, Test Drive Reminder - V1, Developer Console

Address bar: orgfarm-abc897f57-dev-ed.develop.lightning.force.com/lightning/r/Vehicle\_Order\_c/a03gtL00000Ic8SQAT/view

Search: Search...

WhatNext Vision Motors

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

Vehicle Order

O-0001

New Contact Edit New Opportunity

Related Details

Vehicle Order Number	O-0001	Owner	Kent Mathew Derilo
Vehicle Customer	John		
Vehicle	Honda		
Order Date	11/30/2025		
Status	Pending		
Assigned Dealer	Mateo		
Created By	Kent Mathew Derilo 11/26/2025, 2:37 AM	Last Modified By	Kent Mathew Derilo 11/26/2025, 2:37 AM

philippines.myskillwallet... x Person 1 | Vehicle Service | x Vehicle Test Drive | Salesfo... x Auto Assign Dealer - V1 x Test Drive Reminder - V1 x Developer Console x + - □ x

orgfarm-abb897f57-dev-ed.develop.lightning.force.com/lightning/r/Vehicle\_Service\_Request\_\_c/a05gtL00000Az869QAB/view

WhatNext Vision Motors Vehicle Customers Vehicle Dealers Vehicle Orders Vehicle Service Requests Vehicle Test Drives Vehicles Reports Dashboards

Vehicle Service Request Person 1 New Contact Edit New Opportunity

Related Details

Vehicle Service Request Name	Person 1	Owner	Kent Mathew Derilo
Vehicle Customer	Mack		
Vehicle	Toyota		
Service Date	11/29/2025		
Created By	Kent Mathew Derilo 11/26/2025, 11:45 AM	Last Modified By	Kent Mathew Derilo 11/26/2025, 11:45 AM

philippines.myskillwallet... x Erick | Vehicle Test Drive | x Vehicle Test Drive | Salesfo... x Auto Assign Dealer - V1 x Test Drive Reminder - V1 x Developer Console x + - □ x

orgfarm-abb897f57-dev-ed.develop.lightning.force.com/lightning/r/Vehicle\_Test\_Drive\_\_c/a04gL00000AQq1QAD/view

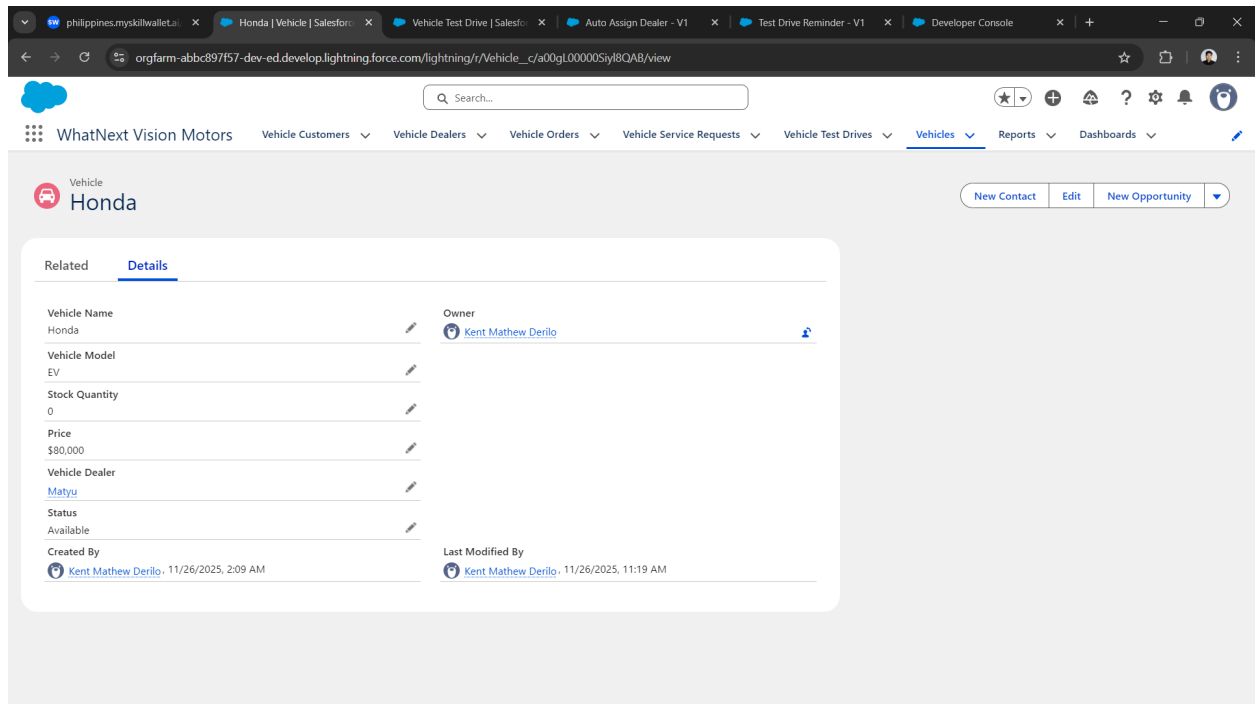
WhatNext Vision Motors Vehicle Customers Vehicle Dealers Vehicle Orders Vehicle Service Requests Vehicle Test Drives Vehicles Reports Dashboards

Vehicle Test Drive Erick New Contact Edit New Opportunity

Related Details

Vehicle Test Drive Name	Erick	Owner	Kent Mathew Derilo
Vehicle Customer	John		
Vehicle	Toyota		
Test Drive Date	11/27/2025		
Status	Scheduled		
Created By	Kent Mathew Derilo 11/26/2025, 7:29 AM	Last Modified By	Kent Mathew Derilo 11/26/2025, 7:29 AM





## Phase 5:Deployment, Documentation & Maintenance

### Deployment Strategy

All components deployed using Change Sets:

- Custom Objects
- Flows
- Apex Classes & Triggers
- Page Layouts
- Reports and Dashboards

### Maintenance Plan

- The admin will keep an eye on scheduled jobs to make sure they run properly.
- Vehicle stock levels will be checked every week.

- Flows and triggers will be updated if the business needs change.
- Every few months, data and sharing settings will be audited to make sure everything is accurate.
- Users will be trained on any new system updates or changes to avoid mistakes.

### **Troubleshooting Approach**

- Debug Logs will be used to find problems with flows or triggers.
- Paused and failed flow interviews in Setup help figure out why a flow didn't work.
- Apex exception logs are checked to spot errors in batch processes.
- Field history tracking helps solve issues related to data changes.
- Collaboration with other admins or developers will be done if problems are hard to fix.

### **Conclusion**

The Salesforce CRM developed for WhatsNext Vision Motors makes the entire car ordering process much easier and more efficient, from choosing a vehicle to confirming the order and following up with customers. Features like automatic dealer assignment, stock checks, email reminders, and batch updates help reduce manual work, prevent mistakes, and keep everything running smoothly. The system also improves communication and keeps the process transparent for both the company and the customer. It's ready to be used in real life and has the potential to grow even more in the future with things like chatbots, AI-based vehicle suggestions, and multi-channel ways to connect with customers, making the whole experience faster and more convenient.

## Future Enhancements

- **Chatbot for instant help** - Adding a Salesforce chatbot would let customers get quick answers, check vehicle availability, or book test drives without waiting for a staff member.
- **AI dealer suggestions** - The system could use AI to recommend the best dealer for a customer by looking at ratings, distance, and traffic, making it easier and faster for customers.
- **Connect with inventory systems** - Linking Salesforce to other inventory systems would keep stock numbers updated everywhere, reducing mistakes and making orders more accurate.
- **Mobile app access** - Turning the CRM into a mobile app would let sales reps and managers check records, manage orders, and monitor stock from anywhere, making work more flexible.
- **Automated follow-up reminders** - The system could automatically send reminders or updates to customers about their orders or test drives, helping improve communication and customer experience.