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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.

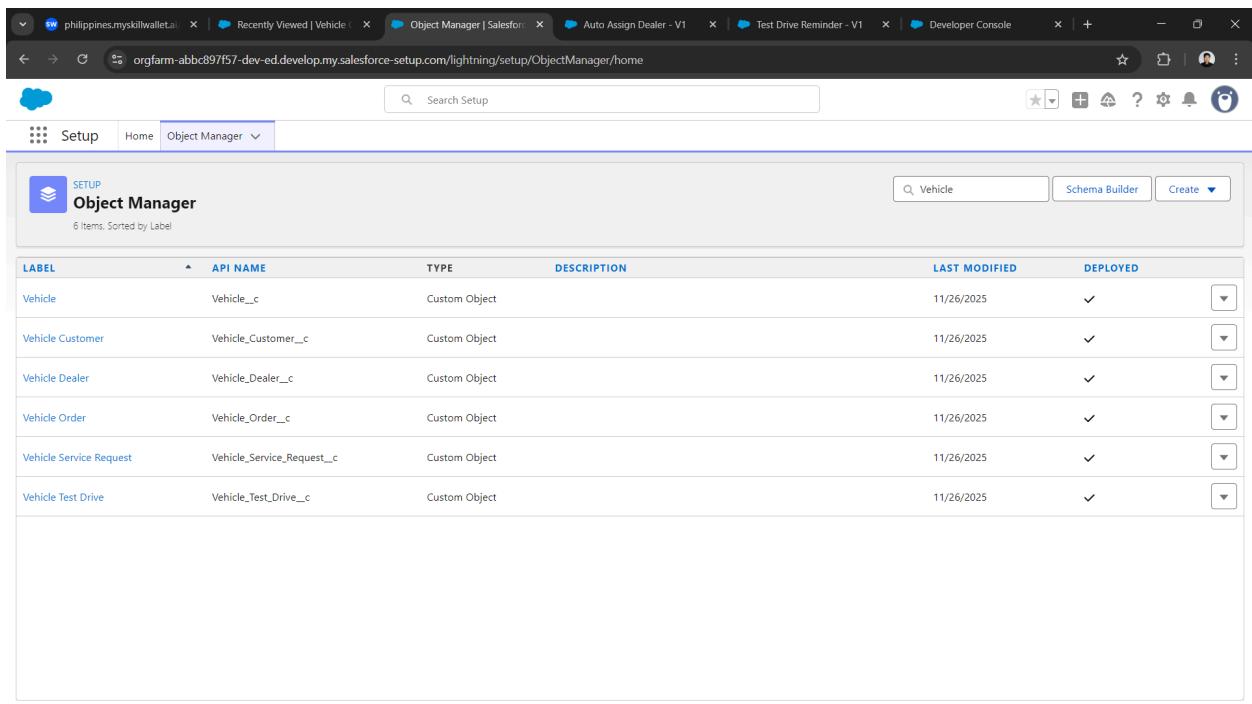
Customization of Objects, Fields, Validation Rules, Automation (Workflow Rules, Process Builder, Flows, Approval Process).

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 page. The URL in the browser is <https://orgfarm-abbc897f57-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/home>. The page has a header with tabs for Setup, Home, and Object Manager. A search bar at the top right contains the text "Vehicle". Below the header is a table titled "Object Manager" with the following data:

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.ai | Recently Viewed | Vehicle | Vehicle | Salesforce | Auto Assign Dealer - V1 | Test Drive Reminder - V1 | Developer Console

orgfarm-abbc897f57-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01gL000003CVMT/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Vehicle

Details

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

Edit Delete

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

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

orgfarm-abbc897f57-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01gL000003CVPY/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Vehicle Customer

Details

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

Edit Delete

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

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

orgfarm-abbc897f57-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01gL000003CVO5/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Vehicle Dealer

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

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

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

orgfarm-abbc897f57-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01gL000003CVXl/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Vehicle Order

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

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

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

orgfarm-abbc897f57-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01gL000003CVsj/Details/view

Setup Home Object Manager

Search Setup

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

Edit Delete

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

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

orgfarm-abbc897f57-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01gL000003CVhR/Details/view

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

Vehicle Test Drive

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

Edit Delete

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

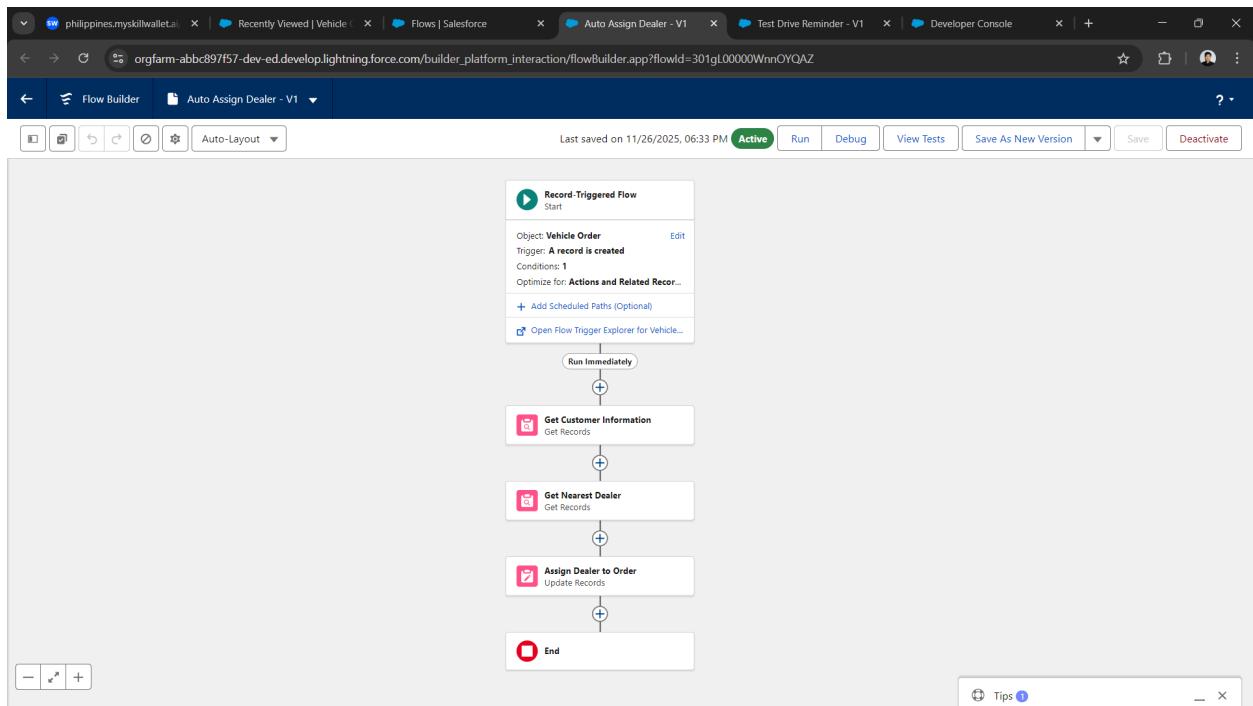
Scoping Rules

Object Access

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.myskillwalletai | O-0003 | Vehicle Order | Salesforce | Vehicle Test Drive | Salesforce | Auto Assign Dealer - V1 | Test Drive Reminder - V1 | Developer Console

orgfarm-abbc897f57-dev-ed.develop.lightning.force.com/lightning/r/Vehicle_Order__c/a03gL00000JDKPxQAP/view

WhatNext Vision Motors

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

Vehicle Order
O-0003

New Contact | Edit | New Opportunity

Related **Details**

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, 11/26/2025, 7:28 AM

Last Modified By: Kent Mathew Derilo, 11/26/2025, 7:28 AM

philippines.myskillwalletai | O-0002 | Vehicle Order | Salesforce | Vehicle Test Drive | Salesforce | Auto Assign Dealer - V1 | Test Drive Reminder - V1 | Developer Console

orgfarm-abbc897f57-dev-ed.develop.lightning.force.com/lightning/r/Vehicle_Order__c/a03gL00000JckgrQAD/view

WhatNext Vision Motors

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

Vehicle Order
O-0002

New Contact | Edit | New Opportunity

Related **Details**

Vehicle Order Number: O-0002

Owner: Kent Mathew Derilo

Vehicle Customer: John

Vehicle: Honda

Order Date: 11/27/2025

Status: Confirmed

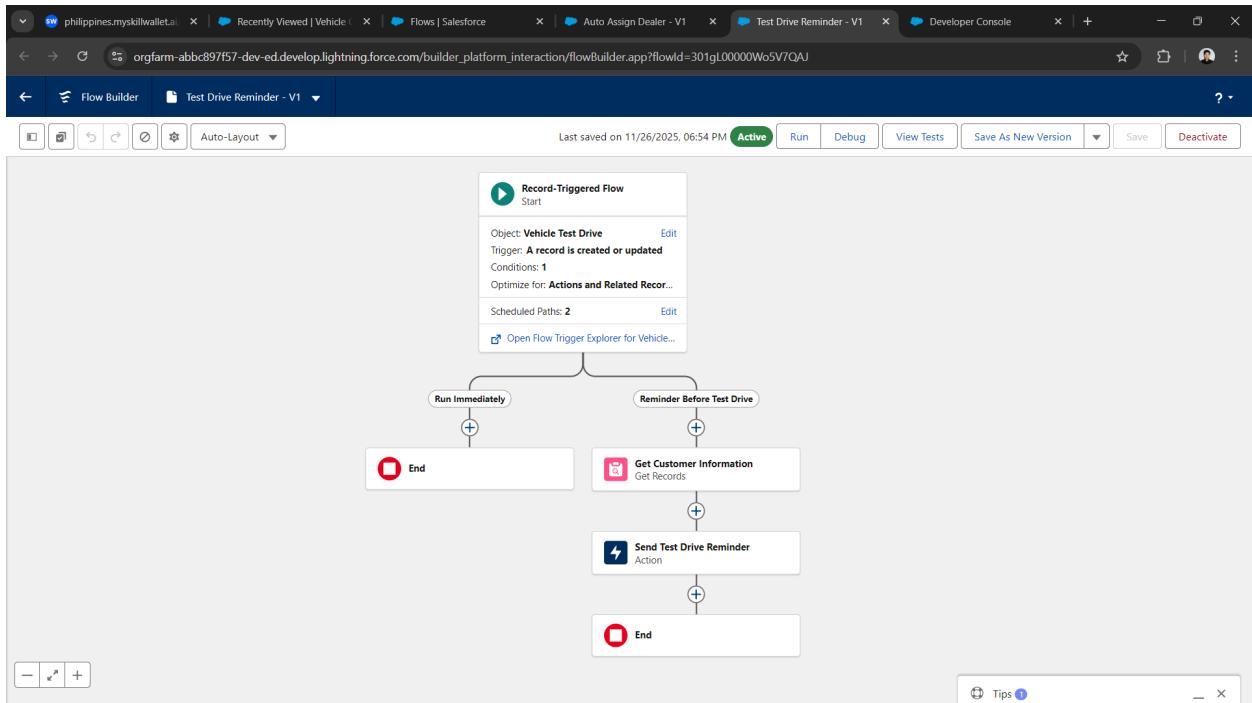
Assigned Dealer:

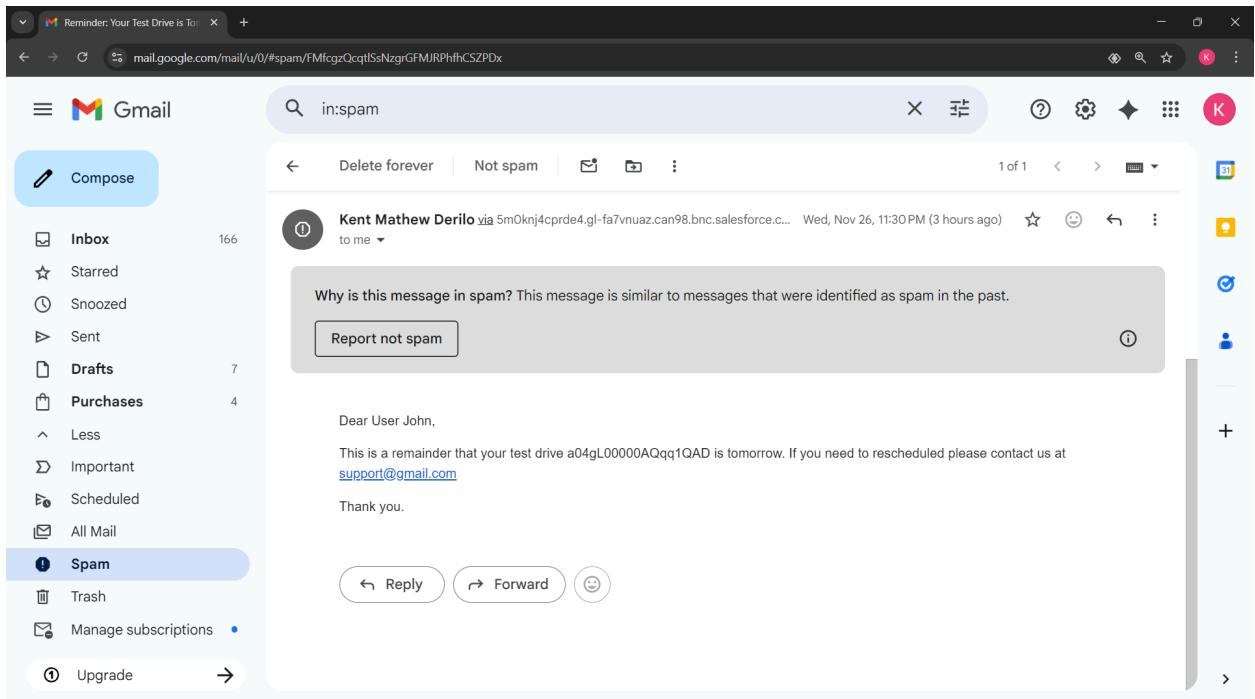
Created By: Kent Mathew Derilo, 11/26/2025, 3:14 AM

Last Modified By: Kent Mathew Derilo, 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.

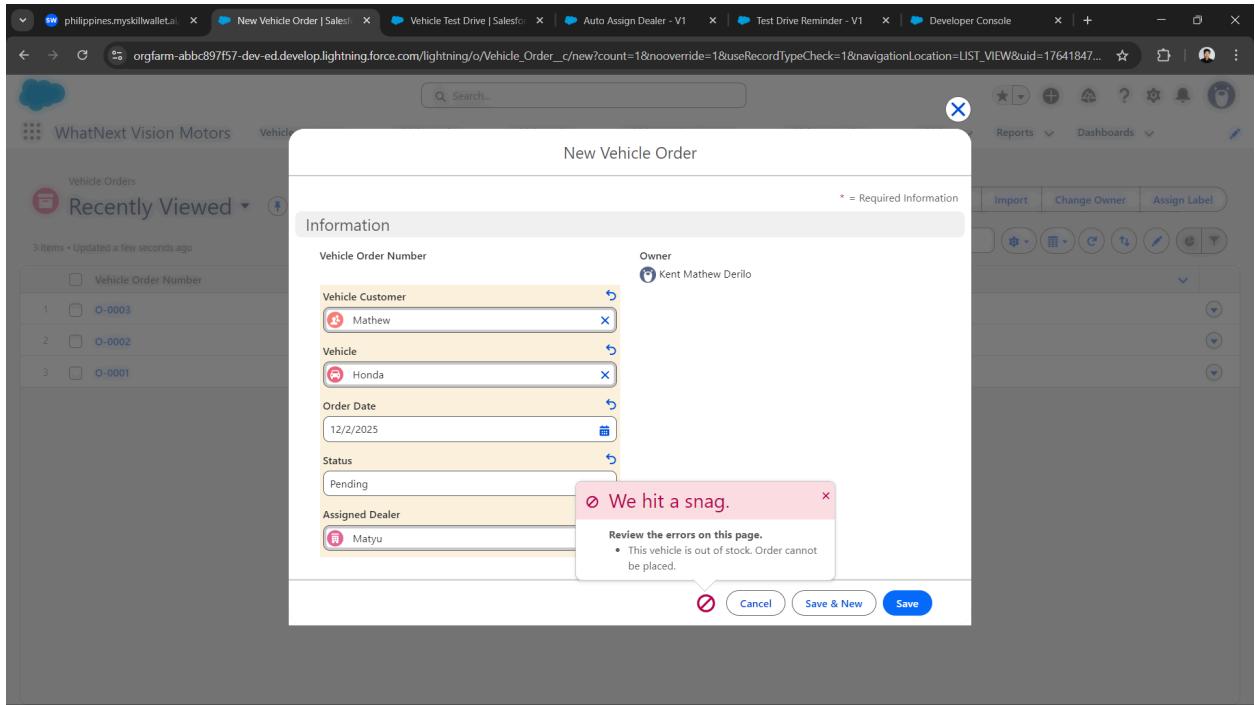




Apex Classes and Triggers

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.

```
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+             preventOrderOutOfStock(newOrders);
6+         }
7+
8+         if (isAfter && (isInsert || isUpdate)) {
9+             updateStockOnOrderPlacement(newOrders);
10+        }
11+
12+    }
13+
14+    // ✖ Prevent placing an order if stock is zero
15+    private static void preventOrderOutOfStock(List<Vehicle_Order_c> orders) {
16+        Set<Id> vehicleIds = new Set<Id>();
17+        for (Vehicle_Order_c order : orders) {
18+            if (order.Vehicle_c != null) {
19+                vehicleIds.add(order.Vehicle_c);
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.');
31+                }
32+            }
33+        }
34+    }
35+
36+    // ✖ Decrease stock when an order is confirmed
37+    private static void updateStockOnOrderPlacement(List<Vehicle_Order_c> orders) {
38+        Set<Id> vehicleIds = new Set<Id>();
39+        for (Vehicle_Order_c order : orders) {
40+            if (order.Vehicle_c != null && order.Status_c == 'Confirmed') {
41+                vehicleIds.add(order.Vehicle_c);
42+            }
43+        }
44+
45+        if (!vehicleIds.isEmpty()) {
46+            Map<Id, Vehicle_c> vehicleStockMap = new Map<Id, Vehicle_c>(
47+                [SELECT Id, Stock_Quantity_c FROM Vehicle_c WHERE Id IN :vehicleIds]
48+            );
49+
50+            List<Vehicle_c> vehiclesToUpdate = new List<Vehicle_c>();
51+            for (Vehicle_Order_c order : orders) {
52+                Vehicle_c vehicle = vehicleStockMap.get(order.Vehicle_c);
53+                if (vehicle != null && vehicle.Stock_Quantity_c > 0) {
54+                    vehicle.Stock_Quantity_c -= 1;
55+                    vehiclesToUpdate.add(vehicle);
56+                }
57+            }
58+
59+            if (!vehiclesToUpdate.isEmpty()) {
60+                updateVehiclesToUpdate();
61+            }
62+        }
63+    }
64+}
```

```
1+ trigger VehicleOrderTrigger on Vehicle_Order_c (before insert, before update, after insert, after update) {
2+     VehicleOrderTriggerHandler.handleTrigger(Trigger.new, Trigger.oldMap, Trigger.isBefore, Trigger.isAfter, Trigger.isInsert, Trigger.isUpdate);
3+ }
```

Screenshot of the Force.com IDE showing the code editor for VehicleOrderBatch.apxc. The code implements a Database.Batchable<sObject> for updating vehicle orders.

```
1 global class VehicleOrderBatch implements Database.Batchable<sObject> {
2     global Database.QueryLocator start(Database.BatchableContext bc) {
3         return Database.getQueryLocator(
4             'SELECT Id, Status__c, Vehicle__c FROM Vehicle_Order__c WHERE Status__c = \'Pending\''
5         );
6     }
7
8     global void execute(Database.BatchableContext bc, List<Vehicle_Order__c> orderList) {
9         Set<Id> vehicleIds = new Set<Id>();
10        for (Vehicle_Order__c order : orderList) {
11            if (order.Vehicle__c != null) {
12                vehicleIds.add(order.Vehicle__c);
13            }
14        }
15
16        if (!vehicleIds.isEmpty()) {
17            Map<Id, Vehicle__c> vehicleStockMap = new Map<Id, Vehicle__c>(
18                'SELECT Id, Stock_Quantity__c FROM Vehicle__c WHERE Id IN :vehicleIds'
19            );
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.');
42    }
43 }
```

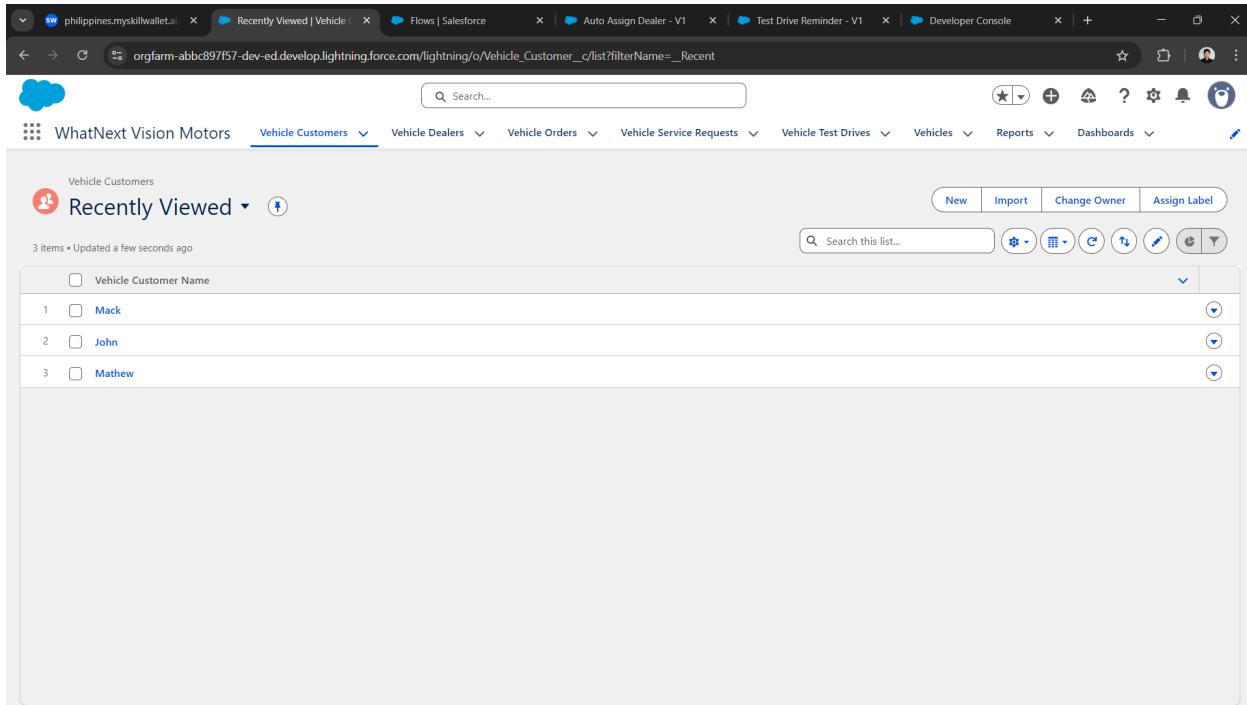
Screenshot of the Force.com IDE showing the code editor for VehicleOrderBatchScheduler.apxc. The code implements a Schedulable class that executes a Database.executeBatch job.

```
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 }
```

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 shows a Salesforce Lightning page titled "Vehicle Customers". The page has a header with a cloud icon, the organization name "WhatNext Vision Motors", and various navigation links like Vehicle Dealers, Vehicle Orders, Vehicle Service Requests, Vehicle Test Drives, Vehicles, Reports, and Dashboards. Below the header is a "Recently Viewed" section for "Vehicle Customer Name" with three items: Mack, John, and Mathew. There are also buttons for New, Import, Change Owner, and Assign Label. The main content area is currently empty.

Vehicle Dealers

Recently Viewed ▾

2 items • Updated a few seconds ago

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

Vehicle Orders

Recently Viewed ▾

3 items • Updated a few seconds ago

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

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

orgfarm-abbc897f57-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



Nothing to see here

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

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

orgfarm-abbc897f57-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

Vehicle Test Drive Name	Actions
1 <input type="checkbox"/> Erick	<input type="button" value="Edit"/>
2 <input type="checkbox"/> xyz	<input type="button" value="Edit"/>

Screenshot of the Salesforce Lightning interface showing the 'Recently Viewed' section for Vehicles.

The URL is: orgfarm-abbc897f57-dev-ed.develop.lightning.force.com/lightning/o/Vehicle_c/list?filterName=_Recent

The page title is: Recently Viewed | Vehicles

Header navigation includes: Vehicle Test Drive | Salesfo, Auto Assign Dealer - V1, Test Drive Reminder - V1, Developer Console.

Page navigation: WhatNext Vision Motors, Vehicle Customers, Vehicle Dealers, Vehicle Orders, Vehicle Service Requests, Vehicle Test Drives, Vehicles (selected), Reports, Dashboards.

Section: Vehicles

Section: Recently Viewed

List:

	Vehicle Name
1	Honda
2	Toyota

Buttons: New, Import, Change Owner, Assign Label.

Search bar: Search this list...

Actions: Filter, Sort, Refresh, Print, Copy, Edit, Delete.

Screenshot of the Salesforce Lightning interface showing the 'Recent' section for Reports.

The URL is: orgfarm-abbc897f57-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru

The page title is: Recent | Reports | Salesforce

Header navigation includes: Vehicle Test Drive | Salesfo, Auto Assign Dealer - V1, Test Drive Reminder - V1, Developer Console.

Page navigation: WhatNext Vision Motors, Vehicle Customers, Vehicle Dealers, Vehicle Orders, Vehicle Service Requests, Vehicle Test Drives, Vehicles, Reports (selected), Dashboards.

Section: Reports

Section: Recent

Text: 0 items

Left sidebar:

- REPORTS
 - Recent
 - Created by Me
 - Private Reports
 - Public Reports
 - All Reports
- FOLDERS
 - All Folders
 - Created by Me
 - Shared with Me
- FAVORITES
 - All Favorites

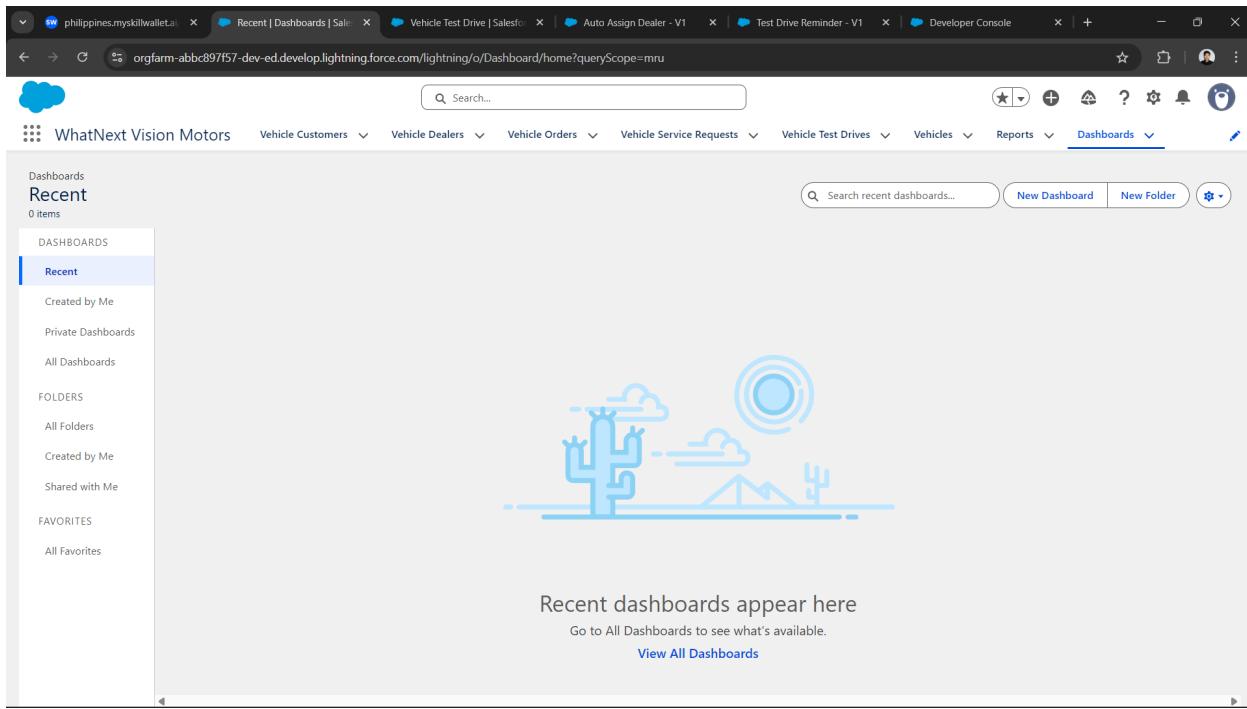
Right sidebar:

Search bar: Search recent reports...

Buttons: New Report, New Folder.

Image: A blue line-art illustration of a desert landscape with a cactus, a sun, and clouds.

Text: Recent reports appear here
Go to All Reports to see what's available.
[View All Reports](#)



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:

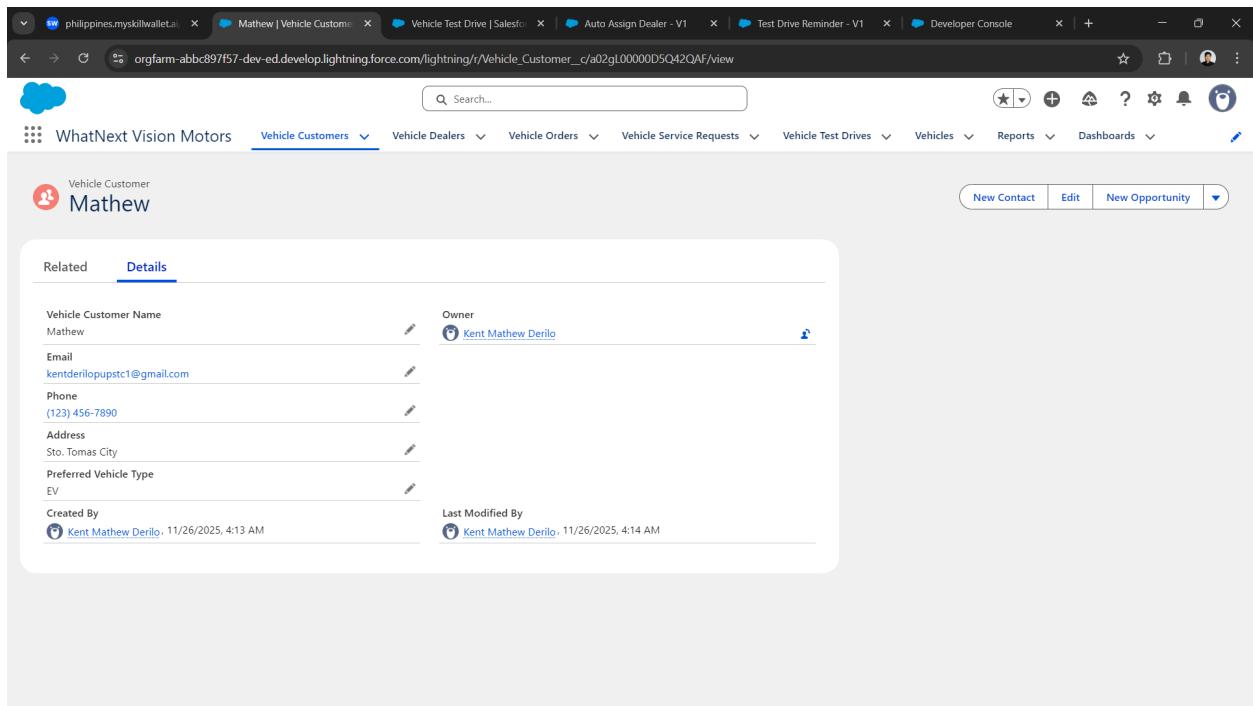
Stock_Quantity_C

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.



A screenshot of the Salesforce Lightning Experience interface. The top navigation bar shows multiple tabs open, including 'Vehicle Test Drive | Salesfo...', 'Auto Assign Dealer - V1', 'Test Drive Reminder - V1', and 'Developer Console'. Below the navigation is a header with a cloud icon, the organization name 'WhatNext Vision Motors', and various menu items like 'Vehicle Customers', 'Vehicle Dealers', 'Vehicle Orders', etc. The main content area displays a 'Vehicle Customer' record for 'Mathew'. The record has a profile picture of a person named 'Mathew'. It includes fields for 'Vehicle Customer Name' (Mathew), 'Email' (kentderilopustc1@gmail.com), 'Phone' ((123) 456-7890), 'Address' (Sto. Tomas City), 'Preferred Vehicle Type' (EV), and 'Created By' (Kent Mathew Derilo). The 'Owner' field shows 'Kent Mathew Derilo'. A note at the bottom indicates the record was last modified by Kent Mathew Derilo on 11/26/2025, 4:14 AM. Action buttons at the top right include 'New Contact', 'Edit', and 'New Opportunity'.

philippines.myskillwalletai | Mateo | Vehicle Dealer | Salesforce | Vehicle Test Drive | Salesforce | Auto Assign Dealer - V1 | Test Drive Reminder - V1 | Developer Console

orgfarm-abbc897f57-dev-ed.develop.lightning.force.com/lightning/r/Vehicle_Dealer__c/a01gL00000WniezQAB/view

The screenshot shows the 'Vehicle Dealers' tab selected in the top navigation bar. The main content area displays the details for a vehicle dealer named 'Mateo'. The 'Details' tab is active. Key fields shown include:

- Vehicle Dealer Name: Mateo
- 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)
- Owner: Kent Mathew Derilo
- Last Modified By: Kent Mathew Derilo (11/26/2025, 2:06 AM)

Buttons at the bottom right: New Contact, Edit, New Opportunity.

philippines.myskillwalletai | O-0001 | Vehicle Order | Salesforce | Vehicle Test Drive | Salesforce | Auto Assign Dealer - V1 | Test Drive Reminder - V1 | Developer Console

orgfarm-abbc897f57-dev-ed.develop.lightning.force.com/lightning/r/Vehicle_Order__c/a03gL00000JCe8SQAT/view

The screenshot shows the 'Vehicle Orders' tab selected in the top navigation bar. The main content area displays the details for a vehicle order with number 'O-0001'. The 'Details' tab is active. Key fields shown include:

- Vehicle Order Number: O-0001
- 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)
- Owner: Kent Mathew Derilo
- Last Modified By: Kent Mathew Derilo (11/26/2025, 2:37 AM)

Buttons at the bottom right: New Contact, Edit, New Opportunity.

philippines.myskillwalletai Person 1 | Vehicle Service Requests Vehicle Test Drive | Salesforce Auto Assign Dealer - V1 Test Drive Reminder - V1 Developer Console

orgfarm-abbc897f57-dev-ed.develop.lightning.force.com/lightning/r/Vehicle_Service_Request__c/a05g100000Azb69QAB/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.myskillwalletai Erick | Vehicle Test Drive Requests Vehicle Test Drive | Salesforce Auto Assign Dealer - V1 Test Drive Reminder - V1 Developer Console

orgfarm-abbc897f57-dev-ed.develop.lightning.force.com/lightning/r/Vehicle_Test_Drive__c/a04g100000AQqq1QAD/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

Vehicle Name: Honda

Vehicle Model: EV

Stock Quantity: 0

Price: \$80,000

Vehicle Dealer: Matyu

Status: Available

Created By: Kent Mathew Derilo, 11/26/2025, 2:09 AM

Owner: Kent Mathew Derilo

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.