

Project Documentation: WhatNext Vision Motors: Shaping the Future of Mobility

with Innovation and Excellence by: Perez, Maria Luisa

Project Overview:

The project centers on developing a tailored Salesforce CRM system for WhatNext Vision Motors, a forward-thinking automotive company. The goal is to simplify and optimize their vehicle order workflow, strengthen customer interactions, and boost overall operational performance. This system will also provide a scalable framework that supports the company's expansion and adapts to the evolving landscape of modern mobility.

Objectives:

- **Create a Comprehensive Customer Profile:**

Develop a centralized system that consolidates all customer touchpoints, vehicle information, and service records into one reliable source.

- **Optimize and Automate Core Processes:**

Introduce automation for tasks such as test-drive bookings, real-time inventory checks, and smart order or dealer assignment. This reduces manual work, minimizes errors, speeds up the sales process, and supports higher transaction throughput.

- **Support Long-Term Growth and Scalability:**

Design a durable, scalable solution using Salesforce native tools (such as Flows and Apex). This ensures WhatNext Vision Motors can easily expand into new mobility services, respond to industry shifts, and continue growing without needing major system replacements.

Phase 1: Requirements Gathering & Planning

- Set up a fresh Salesforce Developer Edition org to guarantee a clean environment for building and testing the solution.
- Conducted all major configurations and modifications inside a sandbox to maintain a safe and isolated development workspace.

Phase 2: Salesforce Backend Development & Configuration

- **Custom Object Setup:** Created the Vehicle, Dealer, Customer, Order, Test Drive, and Service Request objects, each designed with the necessary fields.

- *Example:* The Vehicle object contains fields such as Name, Model (Picklist), Price (Currency), Stock Quantity (Number), Dealer (Lookup), and Status (Picklist).

- **Object Relationships:** Established both lookup and master-detail relationships to properly link Orders with Customers, Vehicles, and Dealers, as well as associate Test Drives and Service Requests with the correct Customer and Vehicle.

- Setup
 Home
 Object Manager ▾

Schema Builder
Create ▾

SETUP

Object Manager

6 Items, Sorted by Label

Label ▲	API Name	Type	Description	Last Modified	Deployed	
Vehicle	Vehicle__c	Custom Object		11/26/2025	✓	<div style="border: 1px solid #ccc; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center;">▾</div>
Vehicle Customer	Vehicle_Customer__c	Custom Object		11/26/2025	✓	<div style="border: 1px solid #ccc; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center;">▾</div>
Vehicle Dealer	Vehicle_Dealer__c	Custom Object		11/26/2025	✓	<div style="border: 1px solid #ccc; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center;">▾</div>
Vehicle Order	Vehicle_Order__c	Custom Object		11/26/2025	✓	<div style="border: 1px solid #ccc; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center;">▾</div>
Vehicle Service Request	Vehicle_Service_Request__c	Custom Object		11/26/2025	✓	<div style="border: 1px solid #ccc; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center;">▾</div>
Vehicle Test Drive	Vehicle_Test_Drive__c	Custom Object		11/26/2025	✓	<div style="border: 1px solid #ccc; width: 20px; height: 20px; display: flex; align-items: center; justify-content: center;">▾</div>

- **Custom Tabs:** Created custom tabs for all custom objects.
- **Lightning App Setup:** Built the *WhatNext Vision Motors* Lightning app, added the custom tabs for navigation, and integrated relevant Reports and Dashboards.
- **Visual Customization:** Applied suitable tab icons and styles (e.g., a car icon for Vehicles and a people icon for Customers).

orgfarm-ea95b968d1-dev-ed.develop.lightning.force.com/lightning/r/Vehicle_Customer__c/a02dL00000RzZlQAF/view

WhatNext Vision Motors

Vehicle Customer

John

Related Details

Vehicle Customer Name	John	Owner	Maria Luisa Perez
Email	perezmarialuisa0809@gmail.com		
Phone	09974615618		
Address	Bulacan		
Preferred Vehicle Type	Sedan		
Created By	Maria Luisa Perez, 12/12/2025, 9:04 AM	Last Modified By	Maria Luisa Perez, 12/12/2025, 9:04 AM

Custom Tabs

Setup Home Object Manager

App Launcher

Search Setup

Flow Trigger Explorer New Flow

Flows

Sorted by Flow Label • Filtered by All flow definitions • Updated 2 hours ago

Flow Label	Process Type	Active	Test	Package State	Pac...	Las...	Las...
Add Case Comment	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Add or Modify Service Appointment Attendees	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Approvals Workflow: Evaluate Approval Requests	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Approvals Workflow: Process Approval Submission	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Authentication Provider User Registration	Identity User Registration Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Basic Approval Request	Flow Orchestration for CMS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Book Appointment from Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Cancel All Eligible Items Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			

Lightning App SetUp

Phase 4:Data Migration, Testing & Security

Demo Scenario

1. **Create a Vehicle Record** ○ Vehicle: *Honda* ○
Model: *Sedan* ○ Price: \$80,000 ○ Stock: 100 ○
Dealer: *TM*
○ Status: *Available*

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

Vehicle Honda

New Contact Edit New Opportunity

Related Details

Vehicle Name	Honda	Owner	Maria Luisa Perez
Vehicle Model	EV		
Stock Quantity	0		
Price	\$80,000		
Vehicle Dealer	TM		
Status	Available		
Created By	Maria Luisa Perez, 12/12/2025, 9:07 AM	Last Modified By	Maria Luisa Perez, 12/12/2025, 9:54 AM

2. Add Dealer and Customer Records ○

Dealer: *TM*, located in LAGUNA. ○ Customer:

John, with complete contact details and a preferred vehicle selected.

The screenshot shows the Lightning Force CRM interface for a Vehicle Dealer named "TM". The browser address bar displays the URL: `orgfarm-ea95b968d1-dev-ed.develop.lightning.force.com/lightning/r/Vehicle_Dealer__c/a01dL00001j11XVQAY/view`. The page header includes the "WhatNext Vision Motors" logo and a navigation menu with options: "Vehicle Customers", "Vehicle Dealers" (selected), "Vehicle Orders", "Vehicle Service Requests", "Vehicle Test Drives", "Vehicles", and "More". A search bar is located in the top right. The main content area shows the "Vehicle Dealer" details for "TM". The "Details" tab is active, displaying fields for "Vehicle Dealer Name" (TM), "Dealer Location" (Laguna), "Dealer Code" (DC-0002), "Phone" (09974615618), "Email" (perezmarialuisa0809@gmail.com), "Created By" (Maria Luisa Perez, 12/12/2025, 9:06 AM), and "Last Modified By" (Maria Luisa Perez, 12/12/2025, 9:06 AM). The "Owner" field is also visible, showing Maria Luisa Perez. Action buttons "New Contact", "Edit", and "New Opportunity" are located in the top right of the details panel.

Related	Details
Vehicle Dealer Name	TM
Dealer Location	Laguna
Dealer Code	DC-0002
Phone	09974615618
Email	perezmarialuisa0809@gmail.com
Created By	Maria Luisa Perez, 12/12/2025, 9:06 AM
Last Modified By	Maria Luisa Perez, 12/12/2025, 9:06 AM

The screenshot shows the Lightning Force CRM interface for a Vehicle Customer named "John". The browser address bar displays the URL: `orgfarm-ea95b968d1-dev-ed.develop.lightning.force.com/lightning/r/Vehicle_Customer__c/a02dL00000RxZjQAF/view`. The page header includes the "WhatNext Vision Motors" logo and a navigation menu with options: "Vehicle Customers" (selected), "Vehicle Dealers", "Vehicle Orders", "Vehicle Service Requests", "Vehicle Test Drives", "Vehicles", and "More". A search bar is located in the top right. The main content area shows the "Vehicle Customer" details for "John". The "Details" tab is active, displaying fields for "Vehicle Customer Name" (John), "Email" (perezmarialuisa0809@gmail.com), "Phone" (09974615618), "Address" (Bulacan), "Preferred Vehicle Type" (Sedan), "Created By" (Maria Luisa Perez, 12/12/2025, 9:04 AM), and "Last Modified By" (Maria Luisa Perez, 12/12/2025, 9:04 AM). The "Owner" field is also visible, showing Maria Luisa Perez. Action buttons "New Contact", "Edit", and "New Opportunity" are located in the top right of the details panel.

Related	Details
Vehicle Customer Name	John
Email	perezmarialuisa0809@gmail.com
Phone	09974615618
Address	Bulacan
Preferred Vehicle Type	Sedan
Created By	Maria Luisa Perez, 12/12/2025, 9:04 AM
Last Modified By	Maria Luisa Perez, 12/12/2025, 9:04 AM

3. Place a New Order ○ Order created for John for the Honda.

- On save, a Flow automatically assigns the nearest dealer (TM) based on a comparison of the customer's and dealer's locations.

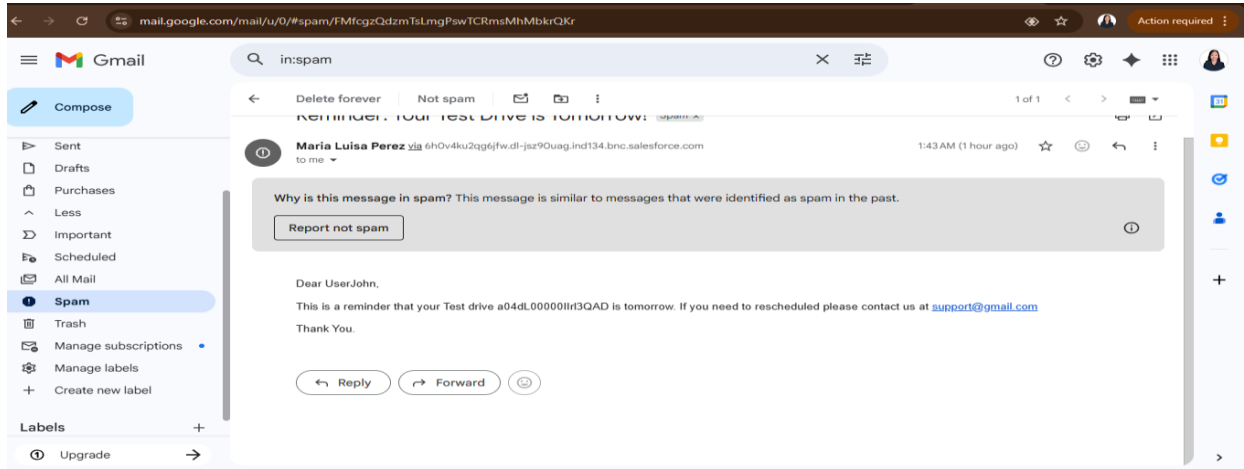
4. Test Out-of-Stock Validation ○ Update the Honda Civic's stock value to 0.

- Attempt to create another order for the same model; the system displays an error and prevents the order—out-of-stock vehicles cannot be sold.

5. Schedule a Test Drive and Trigger Reminders ○

Schedule a test drive for Ella for the following day.

- A Scheduled Flow identifies upcoming test drives and sends an automated email reminder to the customer one day in advance.



Phase 5:Deployment, Documentation & Maintenance

- Moved all finalized components—custom objects, fields, relationships, Flows, validation rules, and Lightning app configurations—from the sandbox to the production environment using Change Sets. Performed post-deployment checks to ensure all features functioned as expected.

Conclusion:

The project successfully delivered a fully functional Salesforce solution tailored for managing vehicles, dealers, customers, orders, test drives, and service requests. The key features such as automated dealer assignment, stock validation, scheduled reminders, and intuitive navigation enhance user efficiency and accuracy.