

Project Documentation: WhatNext Vision Motors: Shaping the Future of Mobility with Innovation and Excellence

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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.

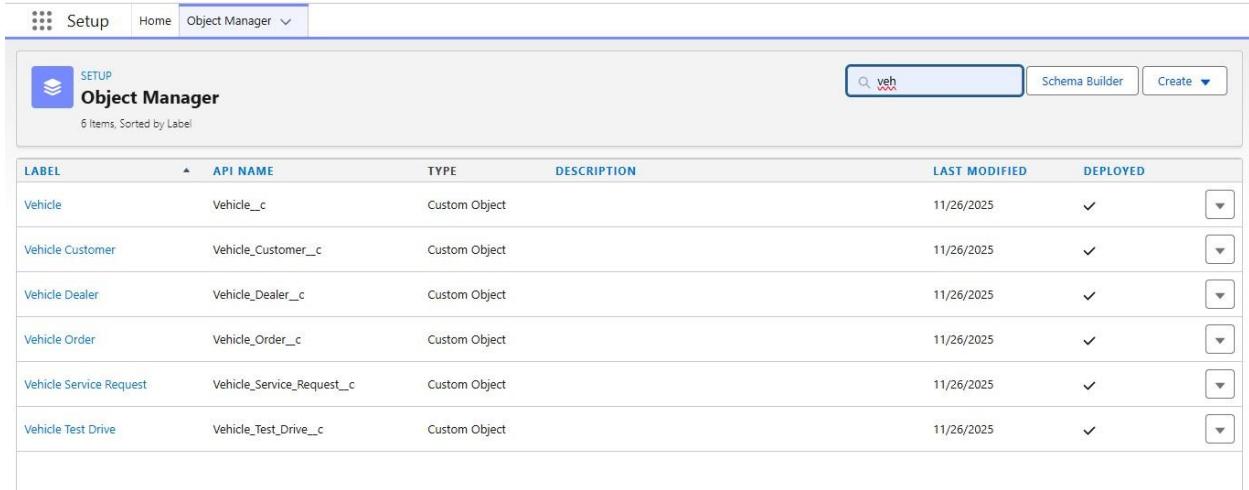
Phase 2: Salesforce Backend Development & Configuration

- 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.

- Vehicle Order: Includes lookup relationships to Vehicle, Customer, and Assigned Dealer.
- Vehicle / Test Drive / Service Request: Additional lookup relationships implemented as needed to maintain proper object linkage.



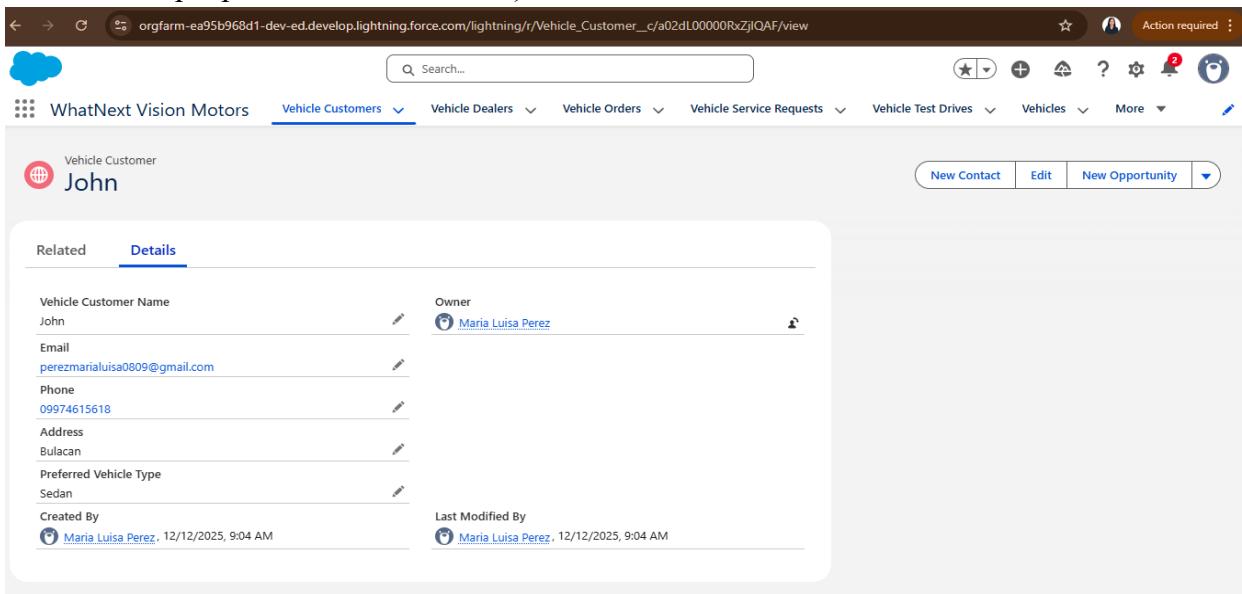
The screenshot shows the Salesforce Object Manager page. At the top, there are tabs for Setup, Home, and Object Manager, with a dropdown for Object Manager. Below the tabs is a search bar containing 'veh' and a 'Schema Builder' button. A 'Create' button with a downward arrow is also present. The main area is titled 'Object Manager' and shows a list of 6 items, sorted by Label. The columns in the table are: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. Each row represents a custom object with its details filled in.

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	✓

Custom Object Creation

Phase 3: UI/UX Development & Customization

- **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).



The screenshot shows the 'Vehicle Customers' tab of the 'WhatNext Vision Motors' Lightning App. The page displays a contact record for 'John'. The contact information includes: Name (John), Email (perezmarialuisa0809@gmail.com), Phone (09974615618), Address (Bulacan), Preferred Vehicle Type (Sedan), and Created By (Maria Luisa Perez). The page also shows the last modified information (Last Modified By: Maria Luisa Perez, 12/12/2025, 9:04 AM). Navigation tabs at the top include Vehicle Customers, Vehicle Dealers, Vehicle Orders, Vehicle Service Requests, Vehicle Test Drives, Vehicles, and More. Action buttons at the top right include New Contact, Edit, and New Opportunity.

Custom Tabs

The screenshot shows the Salesforce Setup interface with the 'Flows' tab selected. A search bar at the top right contains the text 'what'. The main area displays a list of flows, each with a name, process type, and package state. The flows listed include:

Name	Process Type	Package State
Add Case Comment	Autolaunched Flow	Managed-Installed
Add or Modify Service Appointment Attendees	Salesforce Scheduler Flow	Managed-Installed
Approvals Workflow: Evaluate Approval Requests	Screen Flow	Managed-Installed
Approvals Workflow: Process Approval Submission	Screen Flow	Managed-Installed
Authentication Provider User Registration	Identity User Registration Flow	Managed-Installed
Basic Approval Request	Flow Orchestration for CMS	Managed-Installed
Book Appointment from Invitation	Salesforce Scheduler Flow	Managed-Installed
Cancel All Eligible Items Flow	Screen Flow	Managed-Installed
Cancel Item Flow	Screen Flow	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*

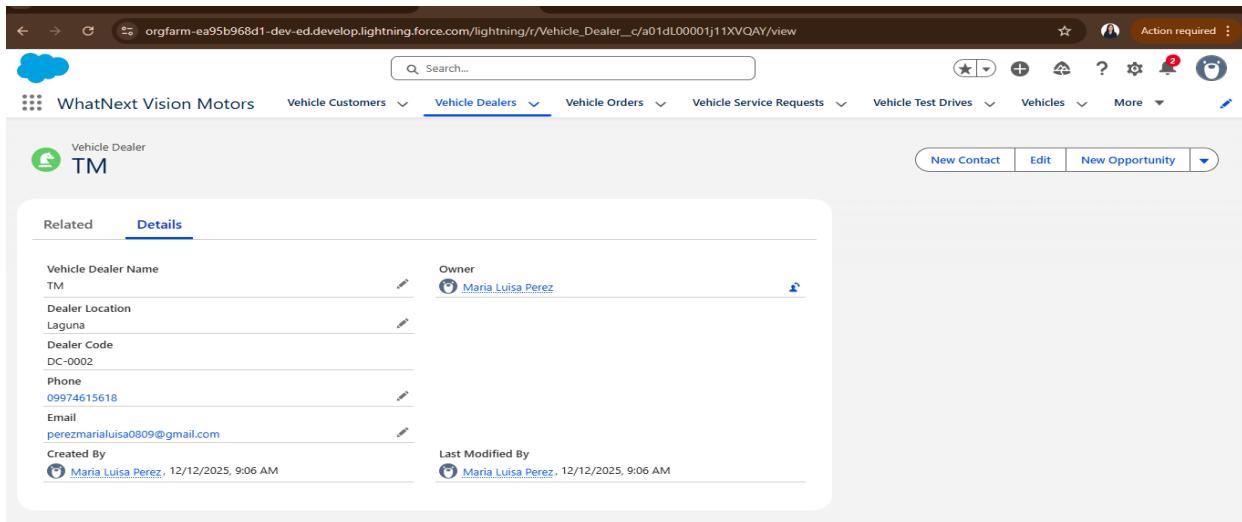
The screenshot shows the Salesforce Lightning App for Vehicles. A vehicle record for a Honda Sedan is displayed. The vehicle details are as follows:

- Vehicle Name: Honda
- 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

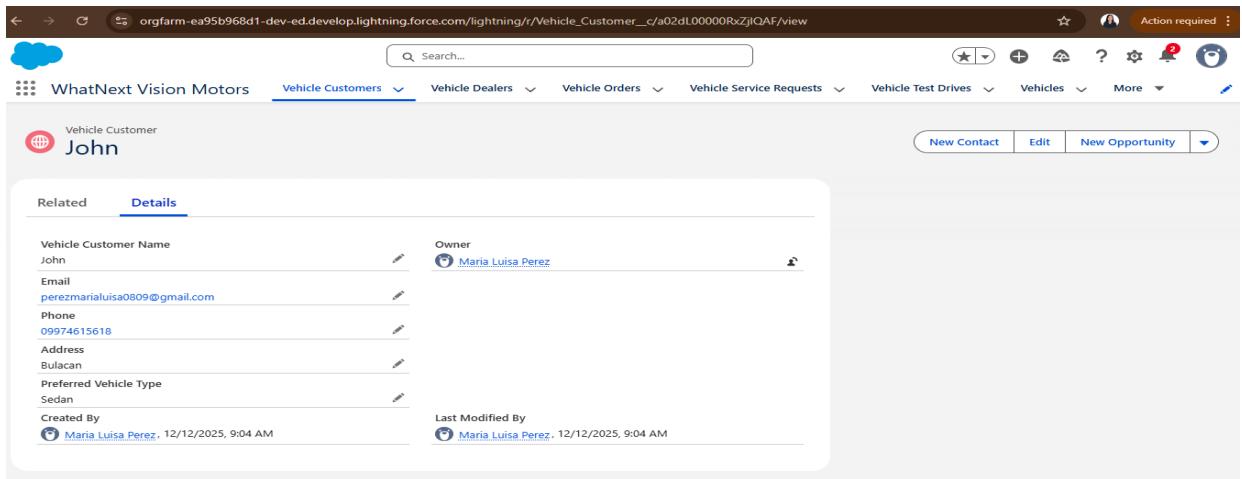
Dealer: *TM*, located in LAGUNA. ○ Customer:

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



The screenshot shows the 'Vehicle Dealers' page in a Salesforce Lightning interface. The top navigation bar includes links for Vehicle Customers, Vehicle Dealers (selected), Vehicle Orders, Vehicle Service Requests, Vehicle Test Drives, Vehicles, and More. A search bar and a 'New Contact' button are also present. The main content area displays a record for 'Vehicle Dealer TM'. The 'Details' tab is selected. The record fields include:

Field	Value
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
Owner	Maria Luisa Perez
Last Modified By	Maria Luisa Perez , 12/12/2025, 9:06 AM



The screenshot shows the 'Vehicle Customers' page in a Salesforce Lightning interface. The top navigation bar includes links for Vehicle Customers (selected), Vehicle Dealers, Vehicle Orders, Vehicle Service Requests, Vehicle Test Drives, Vehicles, and More. A search bar and a 'New Contact' button are also present. The main content area displays a record for 'Vehicle Customer John'. The 'Details' tab is selected. The record fields include:

Field	Value
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
Owner	Maria Luisa Perez
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.

New Vehicle Order

Information

* = Required Information

Vehicle Order Number	Owner
Vehicle Customer	Maria Luisa Perez
Vehicle	O-0002
Order Date	12/24/2025
Status	Confirmed
Assigned Dealer	Search Vehicle Dealers...

Cancel Save & New Save

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.

Information

Vehicle Order Number

Vehicle Customer: John

Vehicle: Honda

Order Date: 12/24/2025

Status: Confirmed

Assigned Dealer: Search Vehicle Dealers...

We hit a snag.

Review the errors on this page.

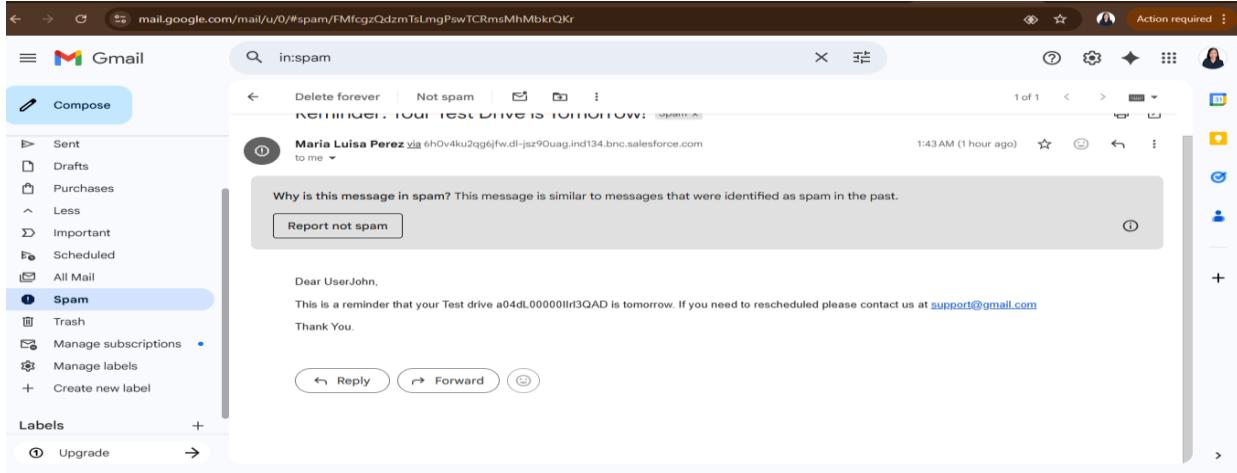
- This vehicle is out of stock. Order cannot be placed.

Cancel Save & New Save

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.