

WhatsNext Vision Motors – Salesforce CRM Project Documentation

Project Overview

WhatsNext Vision Motors is a forward-thinking automotive company focused on delivering seamless customer experiences through digital innovation. To support its mission, a Salesforce CRM solution was developed to improve customer engagement, optimize dealer assignments, automate order management, and ensure real-time stock tracking. The CRM centralizes vehicle data, customer profiles, test drive bookings, orders, and service requests while automating dealer assignment and stock validation to ensure a smooth and error-free purchasing journey. This system enhances operational efficiency, reduces manual work, and significantly improves customer satisfaction.

Objectives

The primary goal of this CRM implementation is to streamline the vehicle purchasing and service process by creating a fully automated, accurate, and customer-friendly system. The CRM ensures better customer management, faster dealer assignment, simplified booking workflows, and real-time updates for stock availability. By automating repetitive tasks, enforcing business rules, improving communication, and enhancing transparency, the system delivers strong business value—resulting in higher productivity and improved customer trust.

Phase 1: Requirement Analysis & Planning

Understanding Business Requirements

The core business needs identified include:

- Assigning customers to the nearest dealer automatically.
- Preventing orders when vehicles are out of stock.
- Tracking vehicles, test drives, customers, orders, dealers, and service requests in a structured system.
- Sending automated reminders for scheduled test drives.
- Keeping order statuses accurate through scheduled and batch processing.
- Providing admins with dashboards and reports for business insights.

Defining Project Scope and Objectives

Scope includes:

- Creation of 6 custom objects with defined relationships.
- Automation using Flows, Apex Triggers, Batch Apex, and Scheduled Apex.
- Implementation of validation rules and stock-check mechanisms.
- Development of Lightning App for navigation of modules.
- User management and security configuration.
- Testing and deployment activities.

Data Model & Security Model

Data Model Includes:

- **Vehicle__c** → stores vehicle data.
- **Vehicle_Dealer__c** → stores authorized dealer information.
- **Vehicle_Customer__c** → stores customer profiles.
- **Vehicle_Order__c** → handles purchase orders.
- **Vehicle_Test_Drive__c** → manages test drives.
- **Vehicle_Service_Request__c** → records servicing requests.

Security Model Includes:

- Profiles, Role Hierarchy, Permission Sets.
- Sharing settings for object-level and record-level access.
- Field history tracking for critical fields like Stock, Status, Email.

Stakeholder Mapping

- **System Admin:** Manages entire CRM, objects, and automations.
- **Sales Staff:** Uses the CRM to create orders and track customers.
- **Dealers:** Receives assigned orders and manages vehicle delivery.
- **Customers:** Indirect stakeholders benefiting from efficient service.

Execution Roadmap

1. Data Modeling → Object creation
2. Backend Automation → Triggers, batch jobs
3. UI Development → Lightning App, Page Layouts
4. Testing → Unit tests, flow tests, process validation

5. Deployment → Change Set deployment

6. Documentation & Maintenance

Phase 2: Salesforce Development – Backend & Configurations

Environment Setup & DevOps Workflow

- Configured a dedicated Salesforce Developer Org to safely create and test custom objects, fields, flows, and Apex components.
- Managed all changes systematically using Change Sets to ensure controlled deployment between environments.
- Utilized the Developer Console for efficient writing, debugging, and testing of Apex classes and triggers.
- Established a streamlined DevOps workflow, supporting version control, conflict prevention, and structured testing and deployment.

Customization of Objects, Fields, Validation Rules

Custom Objects Created:

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

Each object contains key fields such as:

- Stock_Quantity__c
- Status__c

- Dealer_Location__c
- Preferred_Vehicle_Type__c
- Order_Date__c
- Test_Drive_Date__c

Object Manager | Salesforce

orgfarm-006b06c647-dev-ed:develop.my.salesforce-setup.com/lightning/setup/ObjectManager/home

Search Setup

Setup Home Object Manager

Object Manager

6 Items, Sorted by Label

vehicleSchema BuilderCreate

Label	API Name	Type	Description	Last Modified	Deployed	
Vehicle	Vehicle__c	Custom Object		11/20/2025	✓	
Vehicle Customer	Vehicle_Customer__c	Custom Object		11/20/2025	✓	
Vehicle Dealer	Vehicle_Dealer__c	Custom Object		11/20/2025	✓	
Vehicle Order	Vehicle_Order__c	Custom Object		11/20/2025	✓	
Vehicle Service Request	Vehicle_Service_Request__c	Custom Object		11/20/2025	✓	
Vehicle Test Drive	Vehicle_Test_Drive__c	Custom Object		11/20/2025	✓	

Vehicle Test Drive | Salesforce

orgfarm-006806c647-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01lgK000003HSD/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

Vehicle Test Drive

Details

Fields & Relationships

8 Items, Sorted by Field Label

Quick FindNewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Status	Status__c	Picklist		
Test Drive Date	Test_Drive_Date__c	Date		
Vehicle	Vehicle__c	Lookup(Vehicle)		✓
Vehicle Customer	Vehicle_Customer__c	Lookup(Vehicle Customer)		✓
Vehicle Test Drive Name	Name	Text(80)		✓

Page LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch LayoutsList View Button LayoutRestriction RulesScoping RulesObject AccessTriggersFlow TriggersValidation Rules

Vehicle Service Request | Sales

orgfarm-006806c647-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01lgK000003HVR/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

Vehicle Service Request

Details

Fields & Relationships

9 Items, Sorted by Field Label

Quick FindNewDeleted FieldsField DependenciesSet History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Issue Description	Issue_Description__c	Text(60)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Service Date	Service_Date__c	Date		
Status	Status__c	Picklist		
Vehicle	Vehicle__c	Lookup(Vehicle)		✓
Vehicle Customer	Vehicle_Customer__c	Lookup(Vehicle Customer)		✓
Vehicle Service Request Name	Name	Text(80)		✓

Page LayoutsLightning Record PagesButtons, Links, and ActionsCompact LayoutsField SetsObject LimitsRecord TypesRelated Lookup FiltersSearch LayoutsList View Button LayoutRestriction RulesScoping RulesObject AccessTriggersFlow TriggersValidation Rules

Vehicle Order | Salesforce

orgfarm-006b06c647-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/011gK000003HIQb2/FieldsAndRelationships/view

Q Search Setup

Setup Home Object Manager

Vehicle Order

Details

Fields & Relationships

9 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Assigned Dealer	Assigned_Dealer__c	Lookup(Vehicle Dealer)		✓	▼
Created By	CreatedBy	Lookup(User)			
Last Modified By	LastModifiedBy	Lookup(User)			
Order Date	Order_Date__c	Date			▼
Owner	OwnerId	Lookup(User,Group)		✓	
Status	Status__c	Picklist			▼
Vehicle	Vehicle__c	Lookup(Vehicle)		✓	▼
Vehicle Customer	Vehicle_Customer__c	Lookup(Vehicle Customer)		✓	▼
Vehicle Order Name	Name	Text(80)		✓	▼

Vehicle Dealer | Salesforce

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Q Search Setup

Setup Home Object Manager

Vehicle Dealer

Details

Fields & Relationships

8 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Created By	CreatedBy	Lookup(User)			
Dealer Code	Dealer_Code__c	Auto Number			▼
Dealer Location	Dealer_Location__c	Text(60)			▼
Email	Email__c	Email			▼
Last Modified By	LastModifiedBy	Lookup(User)			
Owner	OwnerId	Lookup(User,Group)		✓	
Phone	Phone__c	Phone			▼
Vehicle Dealer Name	Name	Text(80)		✓	▼

Vehicle Customer | Salesforce

orgfarm-006806c647-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/011gK000003HCs/FieldsAndRelationships/view

Q Search Setup

Setup Home 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

Triggers

Flow Triggers

Validation Rules

Fields & Relationships

8 Items, Sorted by Field Label

Q Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Address	Address__c	Text(60)		
Created By	CreatedById	Lookup(User)		
Email	Email__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		
Preferred Vehicle Type	Preferred_Vehicle_Type__c	Picklist		
Vehicle Customer Name	Name	Text(80)		✓

Vehicle | Salesforce

orgfarm-006806c647-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/011gK000003HspV/FieldsAndRelationships/view

Q Search Setup

Setup Home Object Manager

Vehicle

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

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Fields & Relationships

9 Items, Sorted by Field Label

Q Quick Find

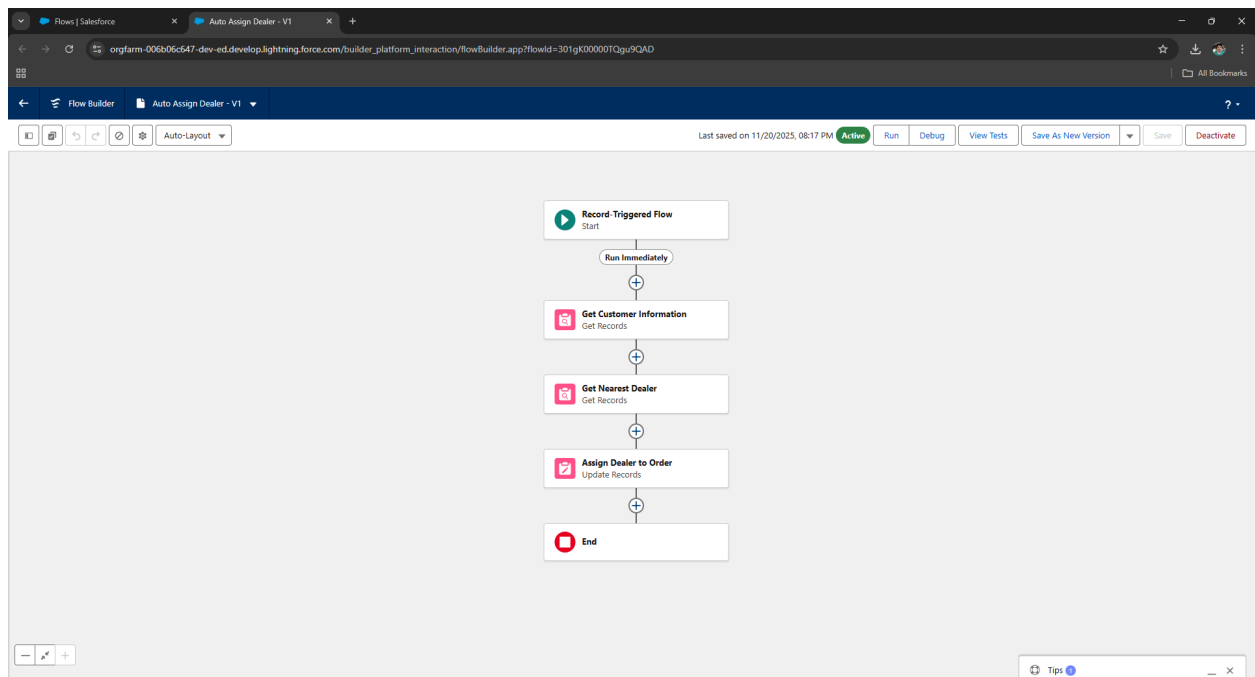
New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Price	Price__c	Currency(18, 0)		
Status	Status__c	Picklist		
Stock Quantity	Stock_Quantity__c	Number(18, 0)		
Vehicle Dealer	Vehicle_Dealer__c	Lookup(Vehicle Dealer)		✓
Vehicle Model	Vehicle_Model__c	Picklist		
Vehicle Name	Name	Text(80)		✓

Automation

Record-Triggered Flows:

1. The Auto-Assign Nearest Dealer flow is a key automation designed to improve customer convenience and operational efficiency. This record-triggered flow runs automatically whenever a new Vehicle Order is created with the status set to *Pending*. The flow first retrieves the customer's address from the associated Vehicle Customer record. Using this address, it searches the Vehicle Dealer records to find the dealer whose location matches or is nearest to the customer. Once the appropriate dealer is identified, the flow automatically updates the order record to assign that dealer. This automation eliminates manual assignment, ensures customers are connected with the most convenient dealer, reduces errors, and speeds up the order fulfillment process, ultimately enhancing the overall customer experience.



Order 1 | Vehicle Order | Sales

orgfarm-005b05c647-dev-ed.develop.lightning.force.com/lightning/r/Vehicle_Order__c/a03gk000000HtGmuQAH/view

WhatNext Vision Motors

Vehicle CustomersVehicle DealersVehicle OrdersVehicle Service RequestsVehicle Test DrivesVehiclesReportsDashboards

Search...

Vehicle Order

Order 1

New ContactEditNew Opportunity

RelatedDetails

Vehicle Order Name

Order 1

Vehicle Customer

Mark

Vehicle

Suzuki

Order Date

11/25/2025

Status

Pending

Assigned Dealer

Tristan

Created By

Mark Tristan Idanan 11/24/2025, 9:04 AM

Owner

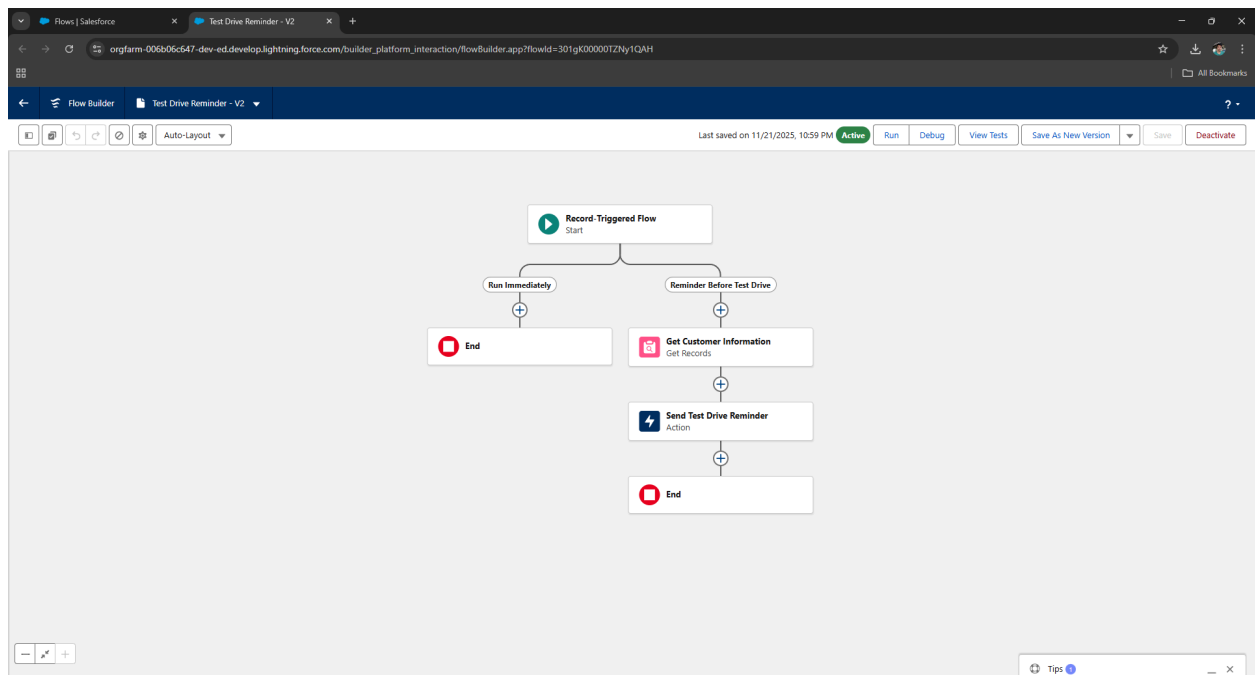
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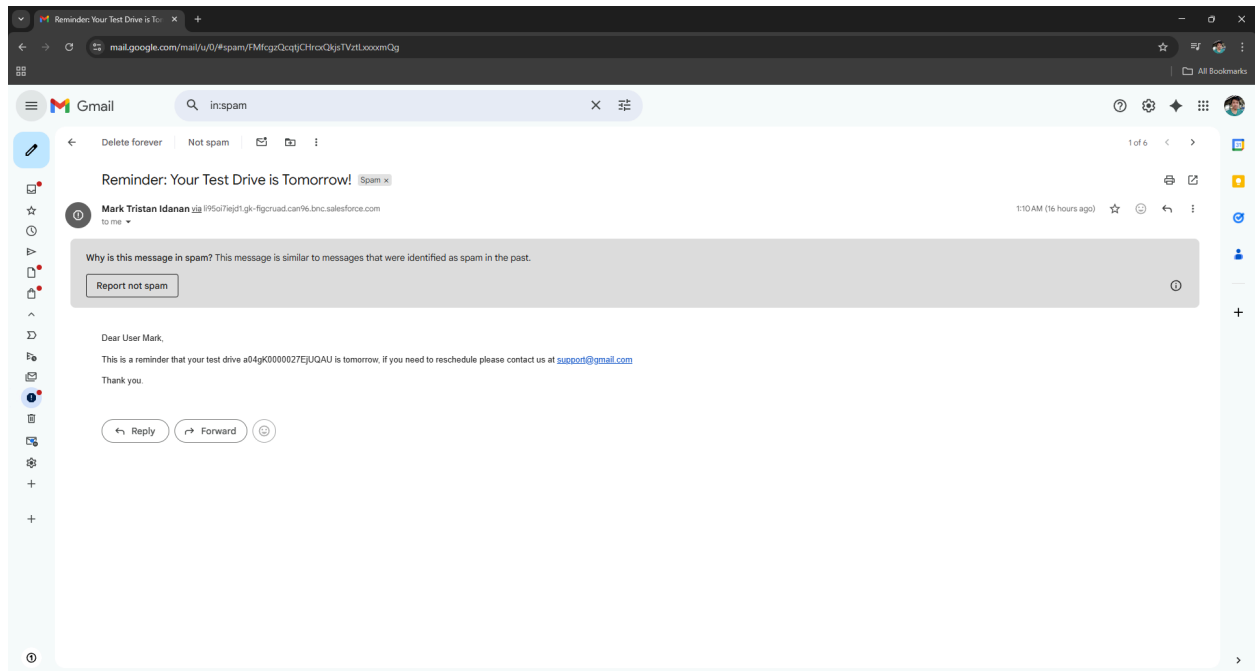
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2. Test Drive Email Reminder

- The Test Drive Reminder flow is designed to enhance customer engagement and reduce missed appointments. This record-triggered flow runs when a Vehicle Test Drive record is created or updated with the status set to *Scheduled*. A scheduled path is configured to trigger 1 day before the test drive date, ensuring timely notifications. The flow first retrieves the customer's email address from the associated Vehicle Customer record. It then sends an automated email reminder to the customer, notifying them of their upcoming test drive. This automation improves customer communication, reduces the risk of no-shows, and enhances the overall service experience without requiring manual intervention from staff.



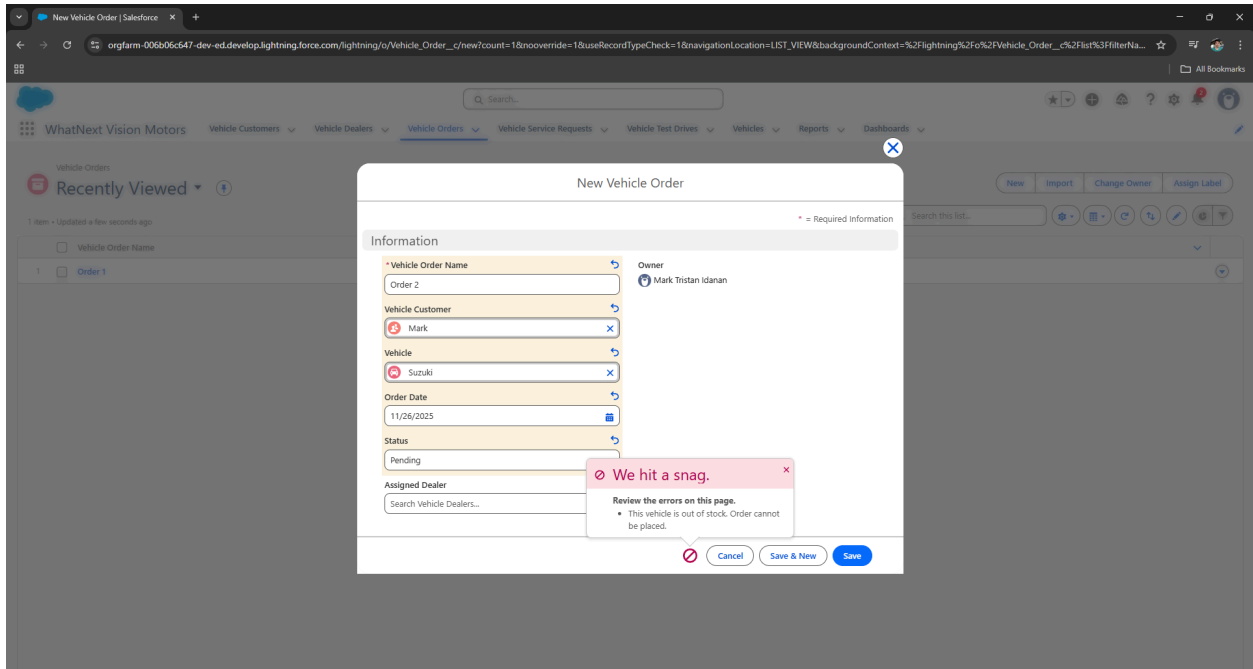


Apex Classes & Triggers

Apex Trigger Handler

Handles:

- Preventing orders if vehicle is out of stock.
- Reducing vehicle stock when order is confirmed.



Trigger

Called on before/after insert & update on Vehicle_Order__c.

Asynchronous Apex

Batch Apex

- Checks all pending orders.
- If vehicle stock is replenished, updates order to Confirmed.
- Reduces stock automatically.

Scheduled Apex

- Schedules batch to run daily at specific time.

Developer Console

orgfarm-006b05c647-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSPage

VehicleOrderTriggerHandler.apex

1 public class VehicleOrderTriggerHandler {
2
3 public static void handleTrigger(List<Vehicle_Order__c> vndOrders, Map<Id, Vehicle_Order__c> oldOrders, Boolean isBefore, Boolean isAfter, Boolean isInsert, Boolean isUpdate) {
4 if (isBefore && isUpdate) { isUpdate(); }
5 preventOrderStatusChange(vndOrders);
6
7 if (isAfter && isInsert) { isInsert(); }
8 updateStockOrderPlacement(vndOrders);
9
10
11
12
13 private static void preventOrderStatusChange(List<Vehicle_Order__c> orders) {
14 Set<Id> vehicleIds = new Set<Id>();
15 for (Vehicle_Order__c order : orders) {
16 if (order.Vehicle__c != null) {
17 vehicleIds.add(order.Vehicle__c);
18 }
19 }
20
21 if (vehicleIds.isEmpty()) {
22 Map<Id, Vehicle__c> vehicleInfoMap = new Map<Id, Vehicle__c>();
23 for (Vehicle_Order__c order : orders) {
24 if (order.Vehicle__c != null) {
25 vehicleInfoMap.put(order.Vehicle__c, order.Vehicle__c);
26 }
27 }
28 for (Vehicle_Order__c order : orders) {
29 Vehicle__c vehicle = vehicleInfoMap.get(order.Vehicle__c);
30 if (vehicle != null && vehicle.Stock_Quantity__c <= 0) {
31 order.addError('This vehicle is out of stock. Order cannot be placed.');32 }
33 }
34 }
35
36 private static void updateStockOrderPlacement(List<Vehicle_Order__c> orders) {
37 Set<Id> vehicleIds = new Set<Id>();
38 for (Vehicle_Order__c order : orders) {
39 if (order.Vehicle__c != null && order.Status__c == 'Confirmed') {
40 vehicleIds.add(order.Vehicle__c);
41 }
42 }
43
44 if (vehicleIds.isEmpty()) {
45 Map<Id, Vehicle__c> vehicleInfoMap = new Map<Id, Vehicle__c>();
46 for (Vehicle_Order__c order : orders) {
47 if (order.Vehicle__c != null) {
48 vehicleInfoMap.put(order.Vehicle__c, order.Vehicle__c);
49 }
50 }
51 for (Vehicle_Order__c order : orders) {
52 Vehicle__c vehicle = vehicleInfoMap.get(order.Vehicle__c);
53 if (vehicle != null && vehicle.Stock_Quantity__c > 0) {
54 vehicle.Stock_Quantity__c -= 1;
55 vehicleInfoMap.put(vehicle.Id, vehicle);
56 }
57 }
58 if (vehicleInfoMap.isEmpty()) {
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Developer Console

orgfarm-006b05c647-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSPage

VehicleOrderTriggerHandler.apex

VehicleOrderTrigger.apex

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 }

Logs

Table with 7 columns: User, Application, Operation, Time, Status, Read, Size

Filter Click here to filter the log list

Developer Console

orgfarm-006806c647-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

VehicleOrderTriggerHandler.apex VehicleOrderBatch.apex **VehicleOrderBatchScheduler.apex** VehicleOrderTrigger.apex

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

User	Application	Operation	Time	Status	Read	Size
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Filter Click here to filter the log list

Developer Console

orgfarm-006806c647-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

VehicleOrderTriggerHandler.apex **VehicleOrderBatchScheduler.apex** VehicleOrderBatch.apex VehicleOrderTrigger.apex

Code Coverage: None API Version: 65 Go To

```
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.');

Logs Tests Checkpoints Query Editor View State Progress Problems



| User | Application | Operation | Time | Status | Read | Size |
|------|-------------|-----------|------|--------|------|------|
|------|-------------|-----------|------|--------|------|------|



Filter Click here to filter the log list

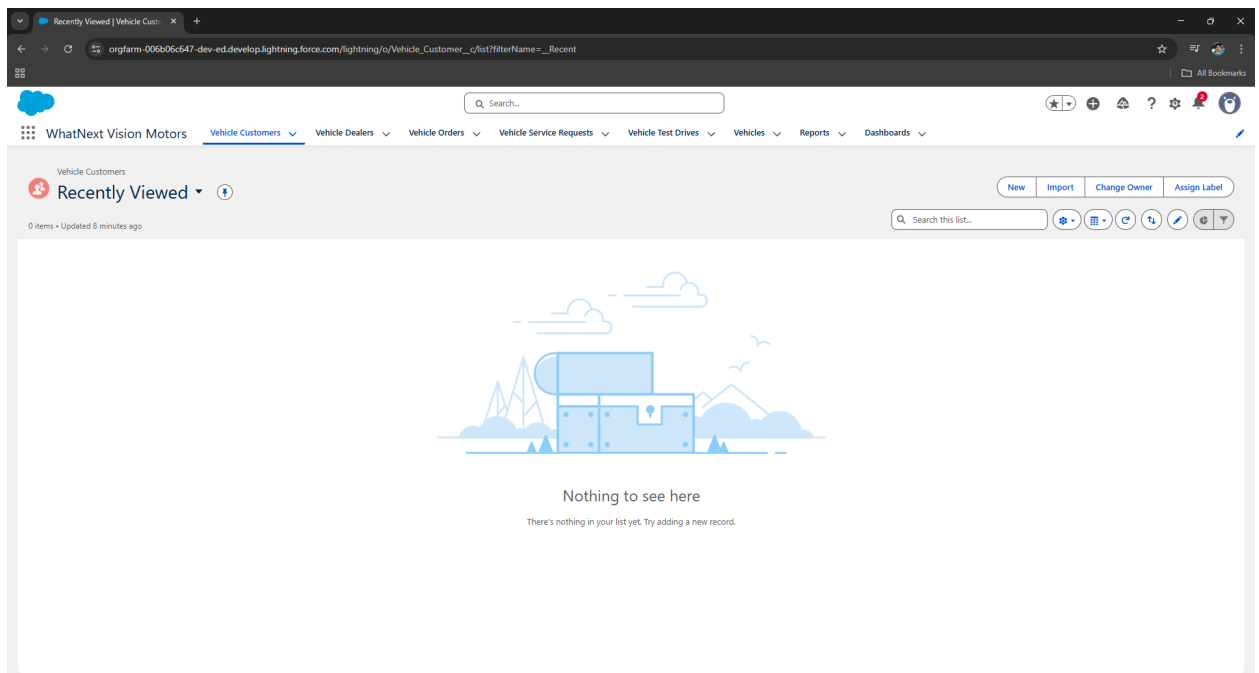

```


Phase 3: UI/UX Development & Customization

Lightning App Setup

Created “**WhatsNext Vision Motors**” App:

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



Page Layouts & Dynamic Forms

- Customized layouts for each object.
- Displayed fields based on user roles.
- Conditional visibility applied where required.

User Management

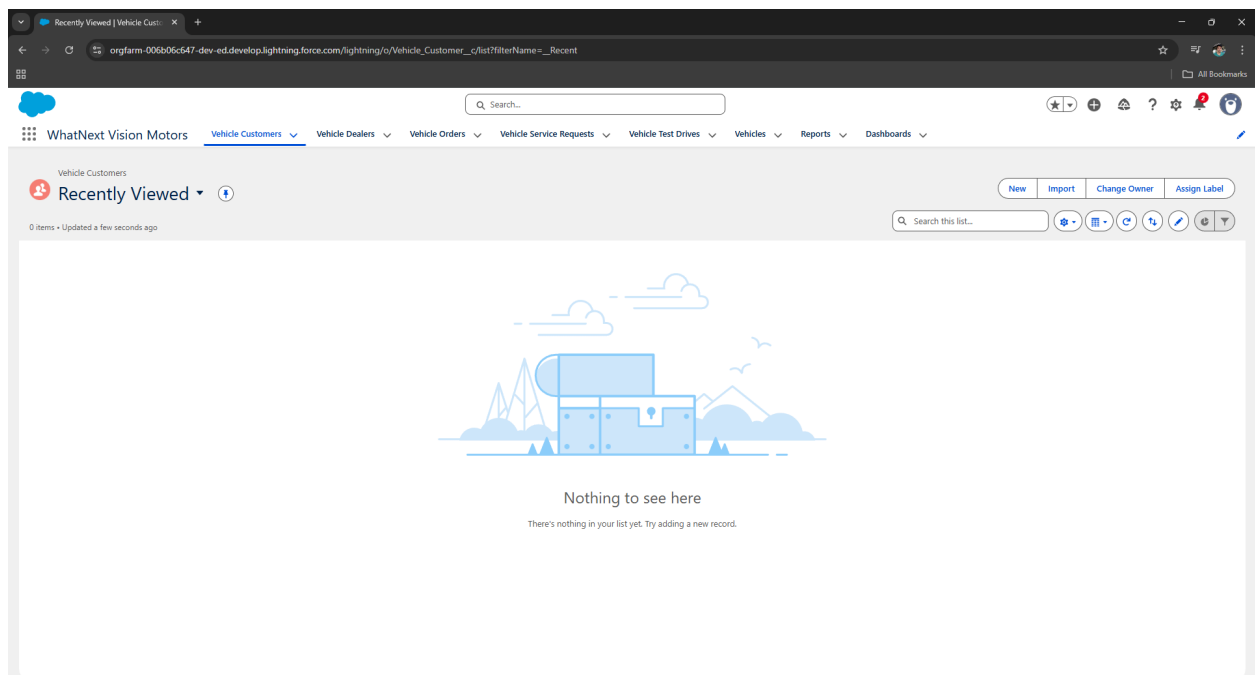
- Assigned profiles (System Administrator).
- Configured app access for users.

Reports and Dashboards

- Vehicle Stock Report
- Dealer Assignment Report
- Test Drive Summary

Lightning Pages

- Custom record pages for Vehicle, Dealer, Customer.
- Related lists and quick actions added.



Recently Viewed | Vehicle Dealers

orgfarm-006b05c647-dev-ed.develop.lightning.force.com/lightning/o/Vehicle_Dealer__c/list?filterName=__Recent

WhatNext Vision Motors

Vehicle Customers

Vehicle Dealers

Vehicle Orders

Vehicle Service Requests

Vehicle Test Drives

Vehicles

Reports

Dashboards

Vehicle Dealers

Recently Viewed

New


Import

Change Owner

Assign Label

0 Items • Updated a few seconds ago

Search this list...



Nothing to see here

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

Recently Viewed | Vehicle Orders

orgfarm-006b05c647-dev-ed.develop.lightning.force.com/lightning/o/Vehicle_Order__c/list?filterName=__Recent

WhatNext Vision Motors

Vehicle Customers

Vehicle Dealers

Vehicle Orders

Vehicle Service Requests

Vehicle Test Drives

Vehicles

Reports

Dashboards

Vehicle Orders

Recently Viewed

New


Import

Change Owner

Assign Label

0 Items • Updated a few seconds ago

Search this list...



Nothing to see here

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

Recently Viewed | Vehicle Serv...

orgfarm-006b05c647-dev-ed.develop.lightning.force.com/lightning/o/Vehicle_Service_Request_c/list?filterName=_Recent

All Bookmarks

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.

Recently Viewed | Vehicle Test...

orgfarm-006b05c647-dev-ed.develop.lightning.force.com/lightning/o/Vehicle_Test_Drive_c/list?filterName=_Recent

All Bookmarks

WhatNext Vision Motors

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


Vehicle Test Drives

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.

Recently Viewed | Vehicles | 5

orgfarm-005b05c647-dev-ed.develop.lightning.force.com/lightning/o/Vehicle__c/list?filterName=__Recent

All Bookmarks

WhatNext Vision Motors

Vehicle Customers

Vehicle Dealers

Vehicle Orders

Vehicle Service Requests

Vehicle Test Drives

Vehicles

Reports

Dashboards

Vehicles

Recently Viewed

New


Import

Change Owner

Assign Label

0 Items • Updated a few seconds ago

Search this list...



Nothing to see here

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

Recent | Reports | Salesforce

orgfarm-006b05c647-dev-ed.develop.lightning.force.com/lightning/r/Report/home?queryScope=mmu

WhatNext Vision Motors

Vehicle CustomersVehicle DealersVehicle OrdersVehicle Service RequestsVehicle Test DrivesVehiclesReportsDashboards

ReportsRecent0 items

REPORTSRecentCreated by MePrivate ReportsPublic ReportsAll ReportsFOLDERSAll FoldersCreated by MeShared with MeFAVORITESAll Favorites

Search recent reports...New ReportNew Folder

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

Recent | Dashboards | Salesforce

orgfarm-006b05c647-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/home?queryScope=mmu

WhatNext Vision Motors

Vehicle CustomersVehicle DealersVehicle OrdersVehicle Service RequestsVehicle Test DrivesVehiclesReportsDashboards

DashboardsRecent0 items

DASHBOARDSRecentCreated by MePrivate DashboardsAll DashboardsFOLDERSAll FoldersCreated by MeShared with MeFAVORITESAll Favorites

Search recent dashboards...New DashboardNew Folder

Recent dashboards appear here
Go to All Dashboards to see what's available.
[View All Dashboards](#)

Phase 4: Data Migration, Testing & Security

Data Loading Process

- Sample customer, dealer, and vehicle records were added to support testing. In this project, records were created manually through the Salesforce interface, though Salesforce also provides tools such as the Data Import Wizard and Data Loader for importing larger datasets if needed. These tools allow for guided uploads and bulk data entry without writing code.

Security Configurations

- The security model was configured to ensure proper data access across the organization. Profiles were set up to control CRUD permissions for each object, while the role hierarchy ensured that managers could automatically view dealer and customer records beneath them. Permission Sets were used to grant additional access to features such as test-drive reminders and reporting tools. Finally, Sharing Rules were implemented to provide controlled visibility for sales teams, ensuring they can only access the data relevant to their responsibilities.

Field History Tracking

Enabled for:

- Stock_Quantity__c
- Status__c
- Order_Date__c

Testing Process

Flow Tests

- Flow tests were conducted to ensure all automations performed correctly. The dealer assignment flow was validated using before-and-after screenshots, and the test drive reminder flow was confirmed to work by adjusting the test drive dates. Trigger functionality was also verified: when a user attempted to order an out-of-stock vehicle, the correct error message appeared, and when an order was marked as *Confirmed*, the system automatically reduced the vehicle's stock. Batch

Apex behavior was tested as well, confirming that pending orders were successfully auto-confirmed once the stock was updated.

The image displays two screenshots of a Salesforce CRM interface for 'WhatNext Vision Motors'. The top screenshot shows the 'Vehicle Customer' profile for 'Mark'. The bottom screenshot shows the 'Vehicle Dealer' profile for 'Tristan'. Both profiles include a 'Details' tab with fields for name, email, phone, address, preferred vehicle type, and creation/modification information.

Vehicle Customer: Mark

Field	Value	Action
Vehicle Customer Name	Mark	Edit
Email	mttristanidanan@gmail.com	Edit
Phone	(123) 456-7890	Edit
Address	Batangas	Edit
Preferred Vehicle Type	Sedan	Edit
Created By	Mark Tristan Idanan, 11/24/2025, 9:01 AM	
Last Modified By	Mark Tristan Idanan, 11/24/2025, 9:01 AM	

Vehicle Dealer: Tristan

Field	Value	Action
Vehicle Dealer Name	Tristan	Edit
Dealer Location	Batangas	Edit
Dealer Code	DC-0005	
Phone	(123) 456-7890	Edit
Email	tristan@gmail.com	Edit
Created By	Mark Tristan Idanan, 11/24/2025, 9:02 AM	
Last Modified By	Mark Tristan Idanan, 11/24/2025, 9:02 AM	

Idanan | Vehicle Dealer | Sales

orgfarm-006b06c647-dev-ed.develop.lightning.force.com/lightning/r/Vehicle_Dealer__c/a01gK000001pav6QAR/view

WhatNext Vision Motors

Vehicle CustomersVehicle DealersVehicle OrdersVehicle Service RequestsVehicle Test DrivesVehiclesReportsDashboards

Vehicle Dealer

Idanan

New ContactEditNew Opportunity

RelatedDetails

Vehicle Dealer Name
Idanan

Dealer Location
Talsay

Dealer Code
DC-0006

Phone
(123) 456-7890

Email
idanan@gmail.com

Created By
Mark Tristan Idanan 11/24/2025, 9:02 AM

Owner
Mark Tristan Idanan

Last Modified By
Mark Tristan Idanan 11/24/2025, 9:02 AM

Request 1 | Vehicle Service Request

orgfarm-006b06c647-dev-ed.develop.lightning.force.com/lightning/r/Vehicle_Service_Request__c/a05gK00000F1IGQA/view

WhatNext Vision Motors

Vehicle CustomersVehicle DealersVehicle OrdersVehicle Service RequestsVehicle Test DrivesVehiclesReportsDashboards

Vehicle Service Request

Request 1

New ContactEditNew Opportunity

RelatedDetails

Vehicle Service Request Name
Request 1

Vehicle Customer
Mark

Vehicle
Subaru

Service Date
11/25/2025

Issue Description
Test

Status
Requested

Created By
Mark Tristan Idanan 11/24/2025, 9:05 AM

Owner
Mark Tristan Idanan

Last Modified By
Mark Tristan Idanan 11/24/2025, 9:05 AM

Reminder 1 | Vehicle Test Drive

orgfarm-006b06c647-dev-ed.develop.lightning.force.com/lightning/r/Vehicle_Test_Drive__c/a04gk0000027EJ3QAU/view

WhatNext Vision Motors

Vehicle Customers

Vehicle Dealers

Vehicle Orders

Vehicle Service Requests

Vehicle Test Drives

Vehicles

Reports

Dashboards

Vehicle Test Drive

Reminder 1

New Contact Edit New Opportunity

Related

Details

Vehicle Test Drive Name

Reminder 1

Owner

Mark Tristan Idanjan

Vehicle Customer

Mark

Vehicle

Suzuki

Test Drive Date

11/25/2025

Status

Scheduled

Created By

Mark Tristan Idanjan 11/24/2025, 9:09 AM

Last Modified By

Mark Tristan Idanjan 11/24/2025, 9:09 AM

Suzuki | Vehicle | Salesforce

orgfarm-006b06c647-dev-ed.develop.lightning.force.com/lightning/r/Vehicle__c/a00gk00000TPYFWQA5/view

WhatNext Vision Motors

Vehicle Customers

Vehicle Dealers

Vehicle Orders

Vehicle Service Requests

Vehicle Test Drives

Vehicles

Reports

Dashboards

Vehicle

Suzuki

New Contact Edit New Opportunity

Related

Details

Vehicle Name

Suzuki

Owner

Mark Tristan Idanjan

Vehicle Model

Sedan

Stock Quantity

97

Price

\$800,000

Vehicle Dealer

Status

Available

Created By

Mark Tristan Idanjan 11/24/2025, 9:01 AM

Last Modified By

Mark Tristan Idanjan 11/25/2025, 2:06 AM

Order 1 | Vehicle Order | Sales | +

orgfarm-005b05c647-dev-ed.develop.lightning.force.com/lightning/r/Vehicle_Order__c/a03gk000000HtGmuQAH/view

WhatNext Vision Motors

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

Vehicle Order

Order 1

New Contact Edit New Opportunity

Related Details

Vehicle Order Name	Order 1	Owner	Mark Tristan Idanan
Vehicle Customer	Mark		
Vehicle	Suzuki		
Order Date	11/25/2025		
Status	Pending		
Assigned Dealer	Tristan		
Created By	Mark Tristan Idanan - 11/24/2025, 9:04 AM	Last Modified By	Mark Tristan Idanan - 11/24/2025, 9:04 AM

Reminder: Your Test Drive is To... | +

mail.google.com/mail/u/0/#spam/FMfcgQcqtjCHrcQkjsTVstLxxoomQg

Gmail

in:spam

Delete forever Not spam

1 of 6

Reminder: Your Test Drive is Tomorrow! spam x

Mark Tristan Idanan via 195o77ejd1-gk-flgorvad.carr6.bnc.salesforce.com to me

1:10 AM (16 hours ago)

Why is this message in spam? This message is similar to messages that were identified as spam in the past.

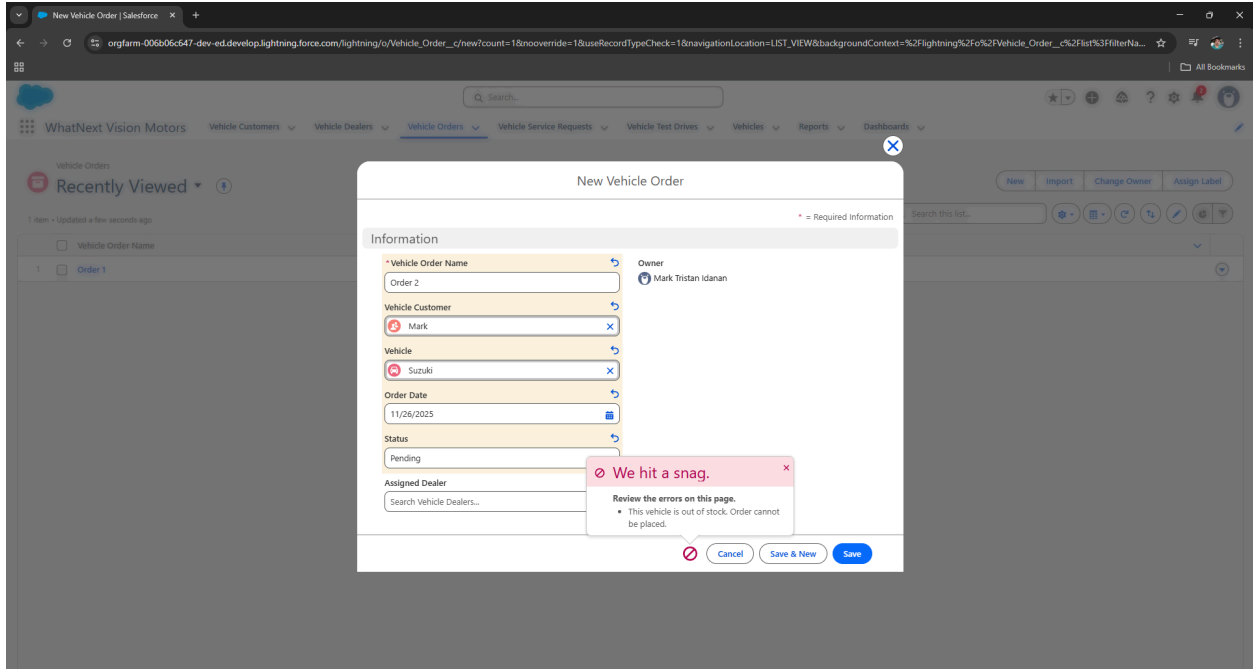
Report not spam

Dear User Mark,

This is a reminder that your test drive a04gk0000027EJUQAU is tomorrow, if you need to reschedule please contact us at support@gmail.com

Thank you.

Reply Forward



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

- Admin will monitor scheduled jobs.
- Vehicle stock levels will be reviewed weekly.
- Flows and triggers will be updated based on new business requirements.
- Quarterly audits for data accuracy and sharing settings.

Troubleshooting Approach

- Use Debug Logs to investigate flow or trigger issues.
- Use Setup → Paused & Failed Flow Interviews to diagnose flow failures.
- Apex exception logs reviewed for batch errors.
- Field history tracking supports data-related issues.

Conclusion

The Salesforce CRM developed for WhatsNext Vision Motors successfully modernizes the entire customer ordering journey, from vehicle selection to order confirmation and follow-up service. With automated dealer assignment, stock validation, email reminders, and batch processing, the system eliminates manual work and ensures accuracy, transparency, and speed. This CRM is ready for real-world use and can scale with future enhancements such as chatbot integration, AI-powered vehicle recommendations, and multi-channel customer communication.

Future Enhancements

- Chatbot integration for instant customer support: Implementing a Salesforce-powered chatbot would allow customers to get real-time assistance, ask questions about vehicles, check stock availability, or schedule test drives without waiting for a support agent.
- AI-powered suggestions for best dealer based on traffic or ratings: Using AI, the system could recommend the most suitable dealer for a customer by analyzing factors like dealer ratings, distance, and current traffic conditions, improving convenience and customer satisfaction.
- Integration with inventory management systems: Connecting Salesforce with external inventory systems would ensure that stock levels are always up-to-date and synchronized across all platforms, preventing stock discrepancies and improving order accuracy.
- Mobile App extension via Salesforce Mobile Publisher: Extending the CRM to a mobile application would enable sales reps and managers to access records, manage orders, and monitor stock on the go, providing flexibility and enhancing operational efficiency.