WhatsNext Vision Motors
Salesforce CRM Implementation

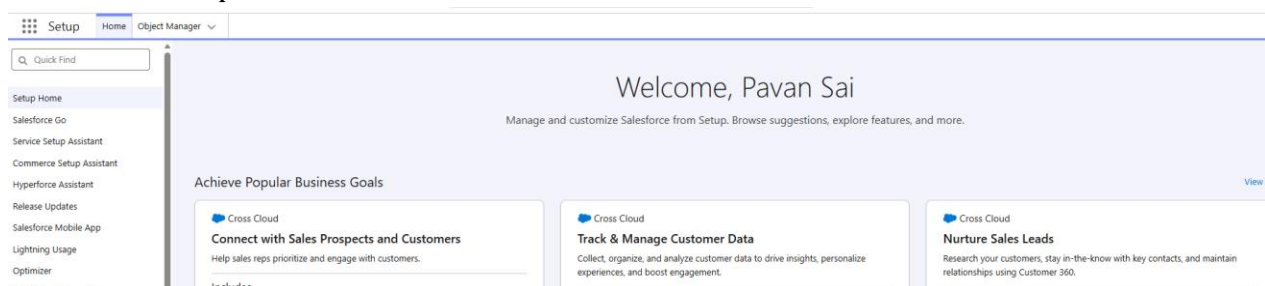## Phase 6

Data Management – Fields & Relationships

1. Phase Overview
Phase 6 focuses on creating fields and relationships for custom objects. These fields help capture detailed information and establish connections between objects.

2. Creating Fields in Vehicle Object
Steps to create a field:

1. Go to Setup

2. Click on Object Manager
3. Search and select Vehicle object
4. Click on Fields & Relationships
5. Click New

Creating Vehicle Model Field:

- Select Data Type as Picklist
- Click Next
- Field Label: Vehicle Model
- Enter Picklist values (Sedan, SUV, EV, etc.)

- Click Next → Next → Save & New

Creating Stock Quantity Field:

- Select Data Type as Number
- Click Next
- Field Label: Stock Quantity
- Click Next → Next → Save & New

Creating Lookup Relationship to Dealer:

- Select Data Type as Lookup Relationship
- Click Next
- Select Dealer Object
- Click Next and Save

3. Key Fields for Each Object

Vehicle__c

- Vehicle_Name__c (Text)
- Vehicle_Model__c (Picklist)

- Stock_Quantity__c (Number)
- Price__c (Currency)
- Dealer__c (Lookup to Dealer)
- Status__c (Picklist)

Vehicle_Dealer__c

- Dealer_Name__c (Text)
- Dealer_Location__c (Text)
- Dealer_Code__c (Auto Number)
- Phone__c (Phone)
- Email__c (Email)

Vehicle_Order__c

- Customer__c (Lookup to Customer)
- Vehicle__c (Lookup to Vehicle)
- Order_Date__c (Date)
- Status__c (Picklist)

Vehicle_Customer__c

- Customer_Name__c (Text)
- Email__c (Email)
- Phone__c (Phone)
- Address__c (Text)
- Preferred_Vehicle_Type__c (Picklist)

Vehicle_Test_Drive__c

- Customer__c (Lookup to Customer)
- Vehicle__c (Lookup to Vehicle)
- Test_Drive_Date__c (Date)

- Status__c (Picklist)

Vehicle_Service_Request__c

- Customer__c (Lookup to Customer)
- Vehicle__c (Lookup to Vehicle)
- Service_Date__c (Date)
- Issue_Description__c (Text)
- Status__c (Picklist)