

# WhatsNext Vision Motors

## Salesforce CRM Implementation

### Phase 3

#### Custom Object Creation

##### 1. Phase Overview

Phase 3 focuses on creating custom objects in Salesforce to store and manage vehicle, dealer, customer, order, test drive, and service request details. These objects form the foundation for data management and automation.

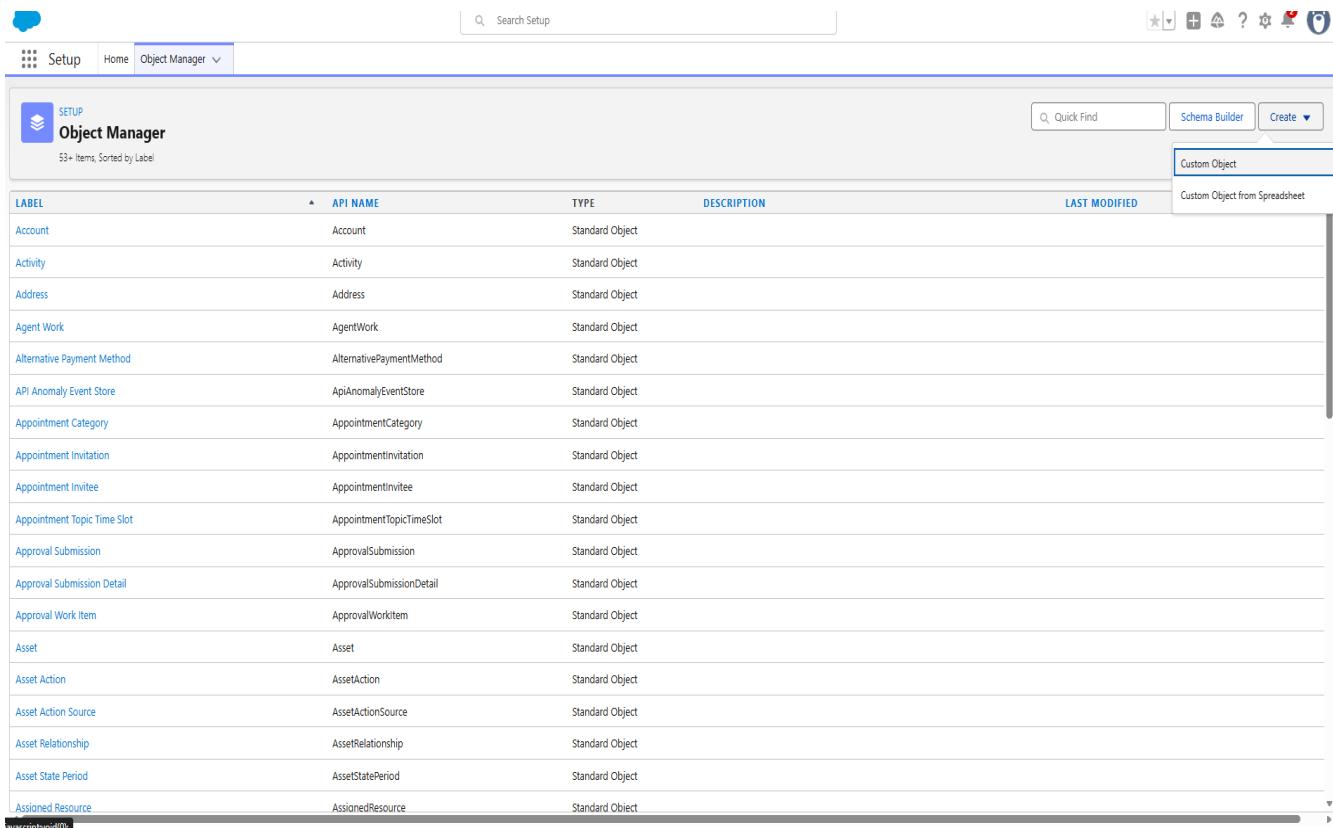
##### 2. Create Vehicle Object

Purpose:

The Vehicle custom object is created to maintain complete information about vehicles, including model details and availability.

Steps to create Vehicle object:

1. Go to Setup
2. Click on Object Manager
3. Click Create → Custom Object



The screenshot shows the Salesforce Object Manager page. At the top, there is a navigation bar with 'Setup' and 'Object Manager' selected. A search bar is at the top right. Below the navigation, the title 'Object Manager' is displayed with a note '53+ items, Sorted by Label'. On the right side of the page, there are buttons for 'Quick Find', 'Schema Builder', and 'Create'. A dropdown menu is open, showing 'Custom Object' as the selected option. The main area is a table listing various standard objects with columns for 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', and 'LAST MODIFIED'. The table includes rows for Account, Activity, Address, Agent Work, Alternative Payment Method, API Anomaly Event Store, Appointment Category, Appointment Invitation, Appointment Invitee, Appointment Topic Time Slot, Approval Submission, Approval Submission Detail, Approval Work Item, Asset, Asset Action, Asset Action Source, Asset Relationship, Asset State Period, and Assigned Resource.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
Account	Account	Standard Object		
Activity	Activity	Standard Object		
Address	Address	Standard Object		
Agent Work	AgentWork	Standard Object		
Alternative Payment Method	AlternativePaymentMethod	Standard Object		
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object		
Appointment Category	AppointmentCategory	Standard Object		
Appointment Invitation	AppointmentInvitation	Standard Object		
Appointment Invitee	AppointmentInvitee	Standard Object		
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object		
Approval Submission	ApprovalSubmission	Standard Object		
Approval Submission Detail	ApprovalSubmissionDetail	Standard Object		
Approval Work Item	ApprovalWorkItem	Standard Object		
Asset	Asset	Standard Object		
Asset Action	AssetAction	Standard Object		
Asset Action Source	AssetActionSource	Standard Object		
Asset Relationship	AssetRelationship	Standard Object		
Asset State Period	AssetStatePeriod	Standard Object		
Assigned Resource	AssignedResource	Standard Object		

4. Label: Vehicle
5. Plural Label: Vehicles
6. Record Name: Vehicle Name
7. Data Type: Text

**Custom Object Definition Edit**

**Custom Object Information**

The singular and plural labels are used in tabs, page layouts, and reports.  
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label	<input type="text" value="Vehicle"/>	Example: Account
Plural Label	<input type="text" value="Vehicles"/>	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	

The Object Name is used when referencing the object via the API.

Object Name	<input type="text" value="Vehicle"/>	Example: Account
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Description

Context-Sensitive Help Setting

<input checked="" type="radio"/> Open the standard Salesforce.com Help & Training window
<input type="radio"/> Open a window using a Visualforce page

Content Name

-None-

**Save** **Save & New** **Cancel**

8. Enable Allow Reports and Allow Search
9. Click Save

### 3. Create Dealer Object

Purpose:

The Dealer object stores detailed information about vehicle dealers who manage customer orders and services.

Steps to create Dealer object:

- Go to Setup
- Click on Object Manager
- Click Create → Custom Object
- Label: Vehicle Dealer
- Plural Label: Vehicle Dealers
- Record Name: Dealer Name
- Data Type: Text

**Custom Object Information**

The singular and plural labels are used in tabs, page layouts, and reports.  
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label	<input type="text" value="Vehicle Dealer"/>	Example: Account
Plural Label	<input type="text" value="Vehicle Dealers"/>	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	

The Object Name is used when referencing the object via the API.

Object Name	<input type="text" value="Vehicle_Dealer"/>	Example: Account
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Description

Context-Sensitive Help Setting

<input checked="" type="radio"/> Open the standard Salesforce.com Help & Training window
<input type="radio"/> Open a window using a Visualforce page

Content Name

-None-

**Save** **Save & New** **Cancel**

- Enable Allow Reports and Allow Search
- Click Save

#### **4. Creating Remaining Custom Objects**

The following additional custom objects are created for data management:

- Vehicle\_Customer\_\_c
  - Stores customer details
  - Related to Orders and Test Drives
- Vehicle\_Order\_\_c
  - Tracks vehicle purchases
  - Related to Customer and Vehicle
- Vehicle\_Test\_Drive\_\_c
  - Tracks test drive bookings
  - Related to Customer and Vehicle
- Vehicle\_Service\_Request\_\_c
  - Tracks vehicle servicing requests
  - Related to Customer and Vehicle

#### **5. Phase 3 Outcome**

- All required custom objects are created
- Data structure is ready for relationships
- Foundation is prepared for automation and Apex development