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.
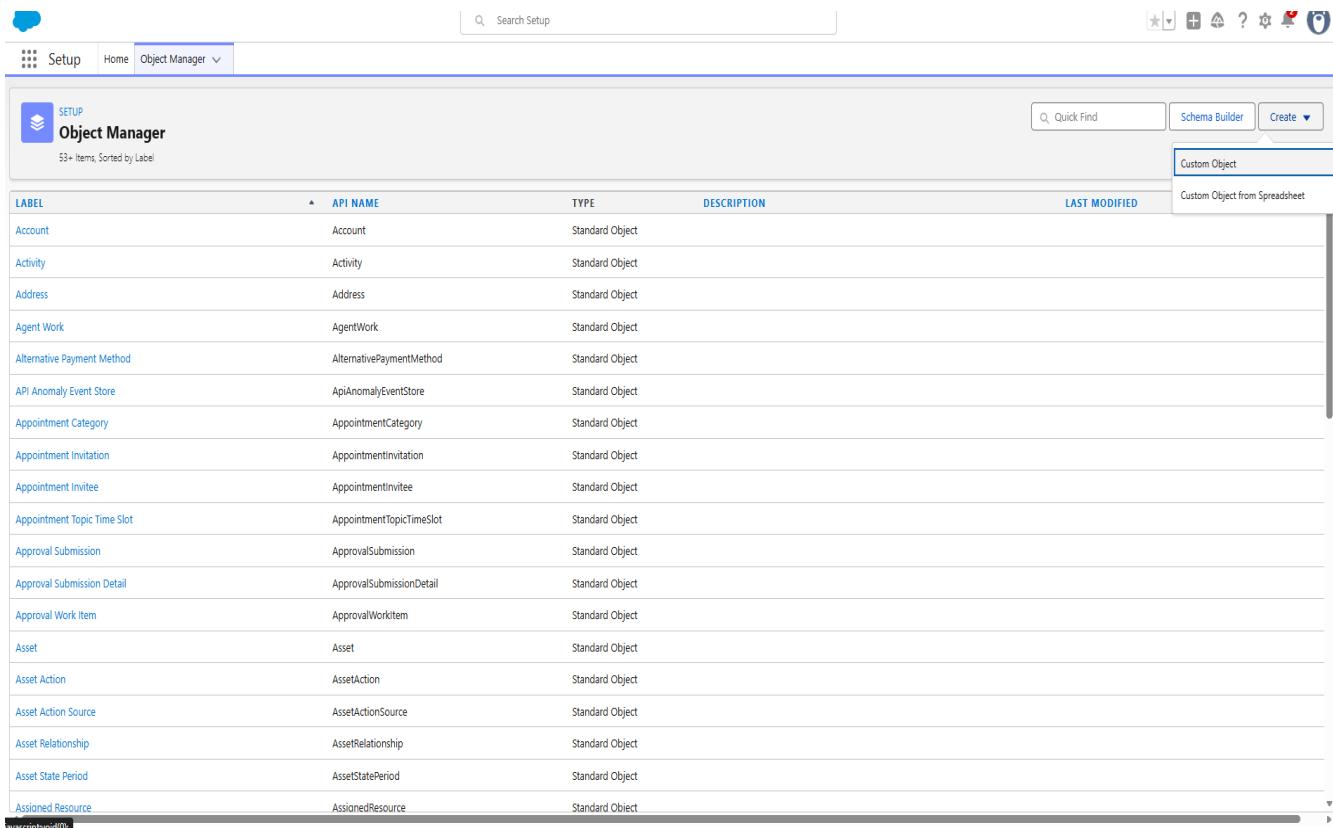
2. Create Vehicle Object

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

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

Custom Object Definition Edit   Save   Save & New   Cancel

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: Vehicle   Example: Account

Plural Label: Vehicles   Example: Accounts

Starts with vowel sound: ☐

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

Object Name: Vehicle   Example: Account

Description: [   ]

Context-Sensitive Help Setting:
◉ Open the standard Salesforce.com Help & Training window
◯ Open a window using a Visualforce page

Content Name: --None-- ∨

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: Vehicle Dealer   Example: Account

Plural Label: Vehicle Dealers   Example: Accounts

Starts with vowel sound: ☐

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

Object Name: Vehicle_Dealer   Example: Account

Description: [   ]

Context-Sensitive Help Setting:
◉ Open the standard Salesforce.com Help & Training window
◯ Open a window using a Visualforce page

Content Name: --None-- ∨

- 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