

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 Setup page, specifically the Object Manager section. The page header includes the Setup menu, Home link, and Object Manager dropdown. The main content area displays a list of standard objects with columns: LABEL, API NAME, TYPE, DESCRIPTION, and LAST MODIFIED. The 'Create' button is highlighted, and a dropdown menu shows 'Custom Object' and 'Custom Object from Spreadsheet'.

| 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 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 Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

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

Object Name Example: Account

Description

Context-Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window
☐ Open a window using a Visualforce page

Content Name

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 Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

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

Object Name Example: Account

Description

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Content Name

- 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