

TCS Salesforce Project – Phase 2 Documentation

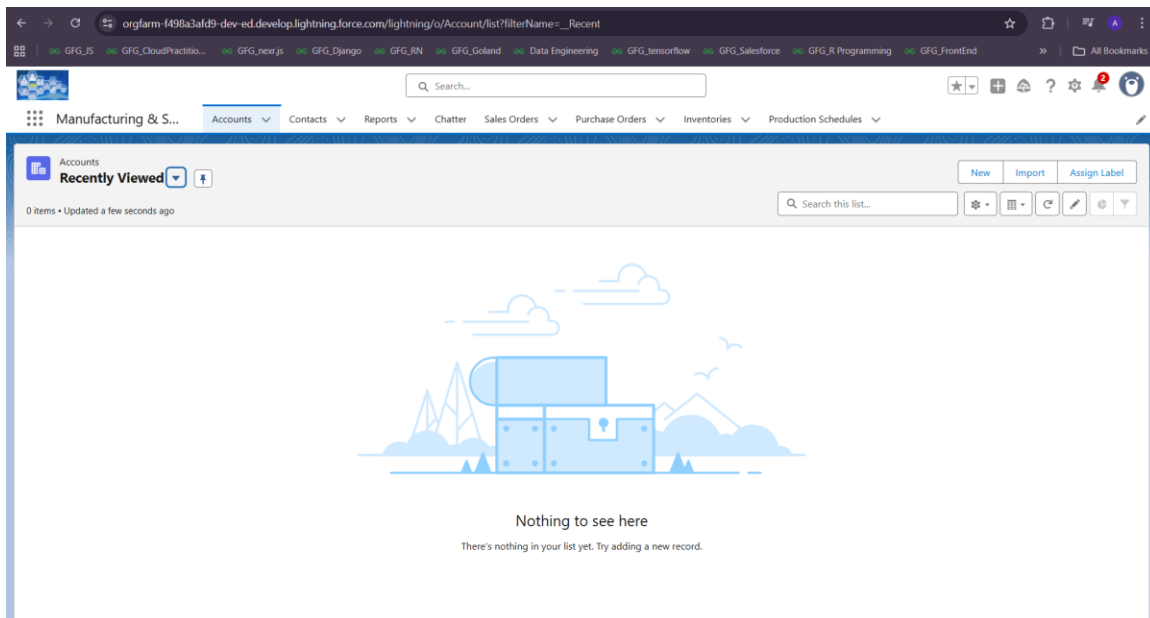
1. App Creation

Description: Lightning App created for managing Manufacturing & Supply Chain operations.

App Name: Manufacturing & Supply Chain CRM

Navigation Style: Standard navigation

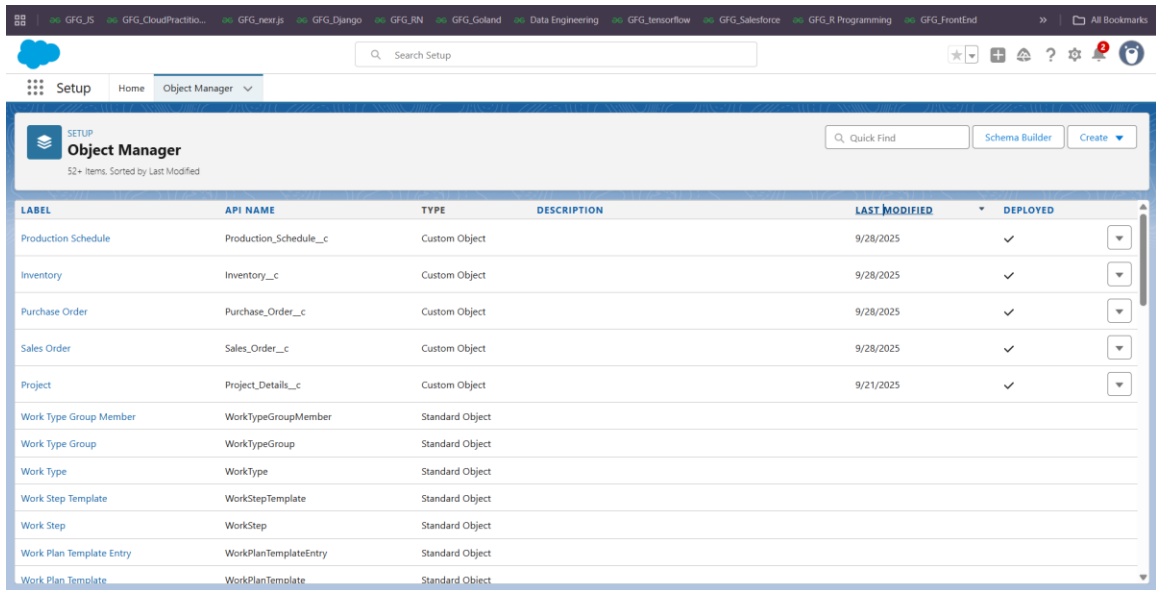
Supported Form Factors: Desktop and Phone



3. Custom Objects in Object Manager

Objects Created:

- Sales Order
- Purchase Order
- Inventory
- Production Schedule



4. Fields Added to Custom Objects

4.1 Sales Order

Fields:

Field Name	Data Type
Customer	Lookup → Account
Order Date	Date
Delivery Date	Date
Status	Picklist
Total Amount	Currency

4.2 Purchase Order

Fields:

Field Name	Data Type
PO Number	Auto Number
Supplier	Lookup → Account
Order Date	Date
Expected Delivery	Date
Status	Picklist
Total Cost	Currency

4.3 Inventory

Fields:

Field Name	Data Type
Product Name	Text
SKU/Item Code	Text
Quantity Available	Number
Reorder Level	Number
Warehouse Location	Text

4.4 Production Schedule

Fields:

Field Name	Data Type
Schedule ID	Auto Number
Product	Lookup → Inventory
Start Date	Date
End Date	Date
Status	Picklist

5. Tabs Created for Custom Objects

Tabs Added:

- Sales Orders
- Purchase Orders
- Inventory
- Production Schedule

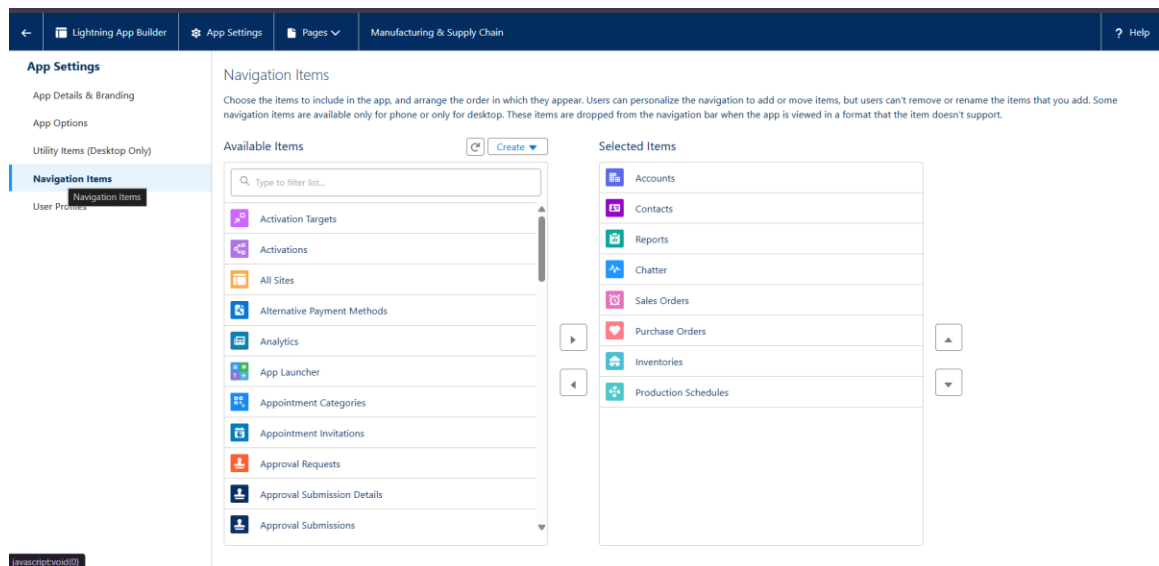
The screenshot shows the Salesforce Setup interface. The left sidebar contains the navigation menu with 'Setup' selected. The main content area is titled 'Custom Tabs' and includes a 'New' button and a 'What Is This?' link. Below this, there are two sections: 'Custom Object Tabs' and 'Web Tabs'. The 'Custom Object Tabs' section displays a table with columns for 'Action', 'Label', 'Tab Style', and 'Description'. The table lists four tabs: 'Inventory' (Inventory style), 'Production Schedules' (Production Schedules style), 'Purchase Orders' (Purchase Orders style), and 'Sales Orders' (Sales Orders style). The 'Web Tabs' section shows a message: 'No Web Tabs have been defined'.

Action	Label	Tab Style	Description
Edit Del	Inventory	Inventory	
Edit Del	Production Schedules	Production Schedules	
Edit Del	Purchase Orders	Purchase Orders	
Edit Del	Sales Orders	Sales Orders	

6. Navigation Items

Items Added in Navigation Bar:

- Accounts
- Contacts
- Sales Orders
- Purchase Orders
- Inventory
- Production Schedule
- Reports
- Chatter (optional)



7. Profiles / Permission Settings (Optional)

Profiles Assigned:

- System Administrator → Full Access
- Standard User → Access to Accounts, Contacts, Sales Orders
- Supplier Manager → Access to Purchase Orders, Supplier Performance
- Production Manager → Access to Inventory & Production Schedule