

Project Tracker:

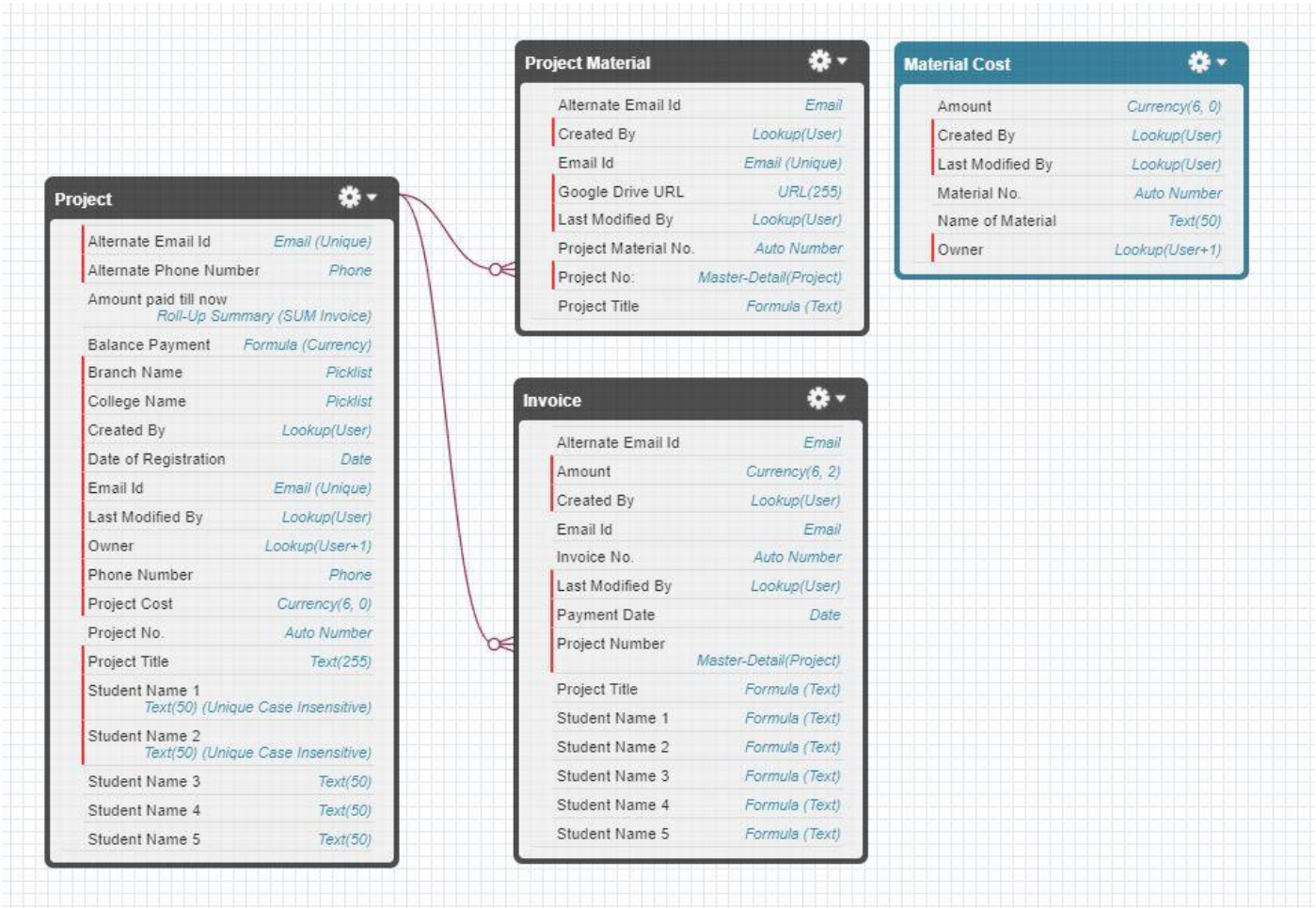
Purpose: The purpose of this project is to keep the record of all the project (i.e., mini/mega project) that are registered with the company and also keep the record of the industrial project. This project will help the owner to track the progress, deadlines and improve faster project delivery along with less paper work and can be easy to track anywhere on the go and so on.

Requirements: The requirement of the project are:

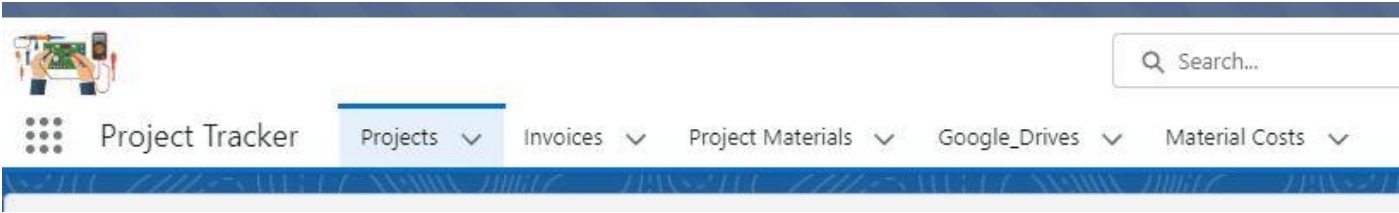
- Easy to use interface since the team who is going to use are not familiar with salesforce.
- The record should contain list of information that is given by the company.
- After every project registration the project client should automatically receive email with all the information of the project with price, deadline etc.
- After every payment made by the client, they should automatically receive email with the payment receipt/invoice.
- It should also send the email alert message 10 days before every installment to the client.
- The owner also wants all the information related to money (i.e., total cost, invoices, balance payment etc) can only visible to him only, not any of the team member.
- When the project related document links (that are upload on google drive or GitHub) are saved under the project name then an email will be automatically send to the client with the document's links.
- When the above links are sending, that time the company owner will also receive the email with the links stating that the project documents of XX project have been shared.
- Also, they want a section where all the company expenses (includes components, travel, hardware etc) can be saved.
- Integration with any cloud services which can hold their project document and can be easily access within the salesforce.
- Home page that will show information such as total project, in progress project, list of upcoming deadlines etc.

Design:


Schema Builder:



Tabs:



Project Registration Record Page:

Project

Wireless Solar Charger


Project No.	Date of Registration	Project Cost	Amount paid till now	Balance Payment
P-0033	5/12/2023	₹22,000	₹0.00	₹22,000

Details

Related

Project No.	Project Title
P-0033	Wireless Solar Charger
Student Name 1	Date of Registration
Rohan Tarale	5/12/2023
Student Name 2	Project Cost
Shantanu Thote	₹22,000
Student Name 3	Amount paid till now
Shubham Iote	₹0.00
Student Name 4	Balance Payment
Akash gote	₹22,000
Student Name 5	
Pooja Zote	
Phone Number	
(896) 547-8532	
Alternate Phone Number	
(635) 894-1563	
Email Id	
ishitasorte@gmail.com	
Alternate Email Id	
rohan tarale9@gmail.com	
College Name	
[PCE] Priyadarshini College of Engineering	
Branch Name	
Electronics Engineering	



Invoice Record Page:

Invoice


Wireless Solar Charger

Project Number	Invoice No.	Payment Date	Amount
P-0033	I-0020	5/12/2023	₹5,000.00

Details

Invoice No.	Student Name 1
I-0020	Rohan Tarale
Project Number	Student Name 2
P-0033	Shantanu Thote
Project Title	Student Name 3
Wireless Solar Charger	Shubham Iote
Payment Date	Student Name 4
5/12/2023	Akash gote
Amount	Student Name 5
₹5,000.00	Pooja Zote
Created By	Last Modified By
 Sky RT, 5/12/2023, 11:00 AM	 Sky RT, 5/12/2023, 11:00 AM

Project Documents Record Page:

Project Material

Wireless Solar Charger

Project No:

Google Drive URL

P-0033

https://github.com/lshi-sorter/Project-Tracker.git

Details

Project No:

P-0033

Project Title

Wireless Solar Charger

Google Drive URL

https://github.com/lshi-sorter/Project-Tracker.git


Created By

 Sky RT, 5/12/2023, 11:06 AM

Last Modified By

 Sky RT, 5/12/2023, 11:06 AM

Company Expenses Record Page:

Material Cost

Components, Risittance, Capacitor

Material No.

Amount

M-0002

₹1,200

Related

Details

Material No.

M-0002

Name of Material

Components, Risittance, Capacitor

Amount

₹1,200

Owner

 Sky RT

Created By

 Sky RT, 5/12/2023, 11:10 AM

Last Modified By

 Sky RT, 5/12/2023, 11:10 AM

Workflow Rules:

All Workflow Rules

Help for this Page

Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder. [Tell Me More](#) | [Migrate your workflow rules to flows](#)

Configure your organization's workflow by creating workflow rules. Each workflow rule consists of:

- Criteria that cause the workflow rule to run.
- Immediate actions that execute when a record matches the criteria. For example, Salesforce can automatically send an email that notifies the account team when a new high-value opportunity is created.
- Time-dependent actions that queue when a record matches the criteria, and execute according to time triggers. For example, Salesforce can automatically send an email reminder to the account team if a high-value opportunity is still open ten days before the close date.

View: All Workflow Rules

Create New View

New Rule

Action	Rule Name ↑	Description	Object	Active
Edit Del Deactivate	Project registration email send		Project	✓
Edit Del Deactivate	Update Email Id In Email Link Send		Project Material	✓
Edit Del Deactivate	Update Email Ids In Invoice Email Send		Invoice	✓

Quick Tips

- Useful Sample Workflow Rules
- Video Tutorial (English Only)
- Troubleshooting Workflow

A

B

C

D

E

F

G

H

I

J

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L

M

N

O

P

Q

R

S

T

U

V

W

X

Y

Z

Other

All

Implementation:

Project Registered Email:

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Your Project Has Been Registered..!!!

Project Name: Wireless Solar Charger

Project No: P-0033


1. Rohan Tarale	Phone No: 8965478532
2. Shantanu Thote	Alternate Phone No: 8358941563
3. Shubham Iote	Email Id: shiltasorte@gmail.com
4. Akash Gote	Alternate Email Id: rohanitarale9@gmail.com
5. Pooja Zote	Project Cost: ₹22,000

POLYTECHNIC | B.E | M.Tech | MEGA & MINI PROJECT

Address:
Engineers LAB,
Police Nagar Second Main Rd, near Sai Nasta & Bhojnaly,
Police Nagar, Nagpur, Maharashtra 440016
Contact No: +91 9579420733

Payments Invoice Email:

ENGINEER'S LAB

An illustration featuring a central white invoice with the word 'INVOICE' at the top. To the left is a blue and white calculator. Below the calculator is a gold coin with a dollar sign. To the right of the coin is a pink wallet. A blue pen is positioned as if writing on the invoice. The entire scene is set against a yellow background with dashed lines and small star-like icons.

Your Payment Has Been Recieved..!!!

Project Name: Wireless Solar Charger

Project No: P-0033

1. Rohan Tarale	Amount: ₹5,000.00
2. Shantanu Thole	Payment Date: 5/12/2023
3. Shubham Iote	
4. Akash gote	
5. Pooja Zote	

POLYTECHNIC | B.E | M.Tech | MEGA & MINI PROJECT

Address:
Engineers LAB,
Police Nagar Second Main Rd, near Sai Nasta & Bhojnaly,
Police Nagar, Nagpur, Maharashtra 440016
Contact No: +91 9579420733

Project Documents Email Link:

ENGINEER'S LAB

Downloading Link Is Given Blow.

Link To Download Your Project Material:

<https://github.com/Ishi-sorte/Project-Tracker.git>

**POLYTECHNIC | B.E | M.Tech | MEGA & MINI
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