

# WhatsNext Vision Motors

## Salesforce CRM Implementation

### Phase 4

#### Data Management – Object Tab Creation

##### 1. Phase Overview

Phase 4 focuses on creating custom object tabs in Salesforce. Tabs help users easily access and manage custom object records from the Salesforce navigation bar.







##### 2. Creating a Custom Object Tab (Vehicle)

Purpose:

The Vehicle tab provides quick access to Vehicle records and allows users to create, view, and manage vehicle details efficiently.

Steps to create Vehicle Object Tab:

1. Go to Setup
2. In the Quick Find bar, type Tabs
3. Click on Tabs
4. Under Custom Object Tabs, click New
5. Select Object as Vehicle
6. Select any Tab Style
7. Click Next
8. On Add to Profiles page, keep default settings and click Next
9. On Add to Custom Apps page, keep default settings

Custom Object Tabs			<a href="#">New</a> <a href="#">What Is This?</a>
Action	Label	Tab Style	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Vehicle Customers</a>	 People	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Vehicle Dealers</a>	 Building	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Vehicle Orders</a>	 Box	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Vehicles</a>	 Car	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Vehicle Service Requests</a>	 Form	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Vehicle Test Drives</a>	 Gears	

10. Click Save

##### 3. Phase 4 Outcome

- Vehicle object is available as a tab
- Users can easily access and manage Vehicle records
- Improved navigation and usability within Salesforce