

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		New What Is This?
Action	Label	Tab Style
Edit Del	Vehicle Customers	 People
Edit Del	Vehicle Dealers	 Building
Edit Del	Vehicle Orders	 Box
Edit Del	Vehicles	 Car
Edit Del	Vehicle Service Requests	 Form
Edit Del	Vehicle Test Drives	 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