Project Documentation: CRM Application for Engineering Works

# Introduction

This document provides a comprehensive overview of the CRM Application project tailored for Engineering Works. The project was structured into 11 milestones, each focusing on specific components of the application, including the creation of objects, fields, tabs, page layouts, record types, validation rules, email templates, and flow automation. The following sections detail each milestone and the tasks accomplished within.

# Milestone 1: Salesforce Developer Account Creation

* Creating Developer Account: A Salesforce developer account was created to enable the development and customization of the CRM application.
* Account Activation: The account was activated to gain access to the Salesforce platform and begin project setup.

# Milestone 2: Object Creation

* Create Fabrication Object: A custom object for tracking and managing fabrication tasks was created.
* Create Shed-Work Object: Developed an object to handle details related to shed construction work.
* Create Pipe Lining Object: Set up an object to manage tasks and information regarding pipe lining operations.
* Create Worker Object: Created an object to store information about the workers involved in various projects.

# Milestone 3: Tabs Creation

* Creating A Custom Tab: A custom tab was developed to provide easy navigation to specific functionalities within the CRM application.
* Creating Remaining Tabs: Additional tabs were created for accessing the newly added objects, enhancing the user interface and navigation.

# Milestone 4: The Lightning App

* Create A Lightning App: A Lightning App was created to offer a modern, interactive experience for users within the Salesforce environment.

# Milestone 5: Fields Creation

* Creation Of Fields For The Fabrication Object: Added specific fields to capture necessary data for fabrication tasks.
* Creation Of Fields For The Shed-Work Object: Added custom fields to store information related to shed construction activities.
* Creation Of Fields For The Pipe Lining Object: Set up fields to document details for pipe lining processes.
* Creation Of Fields For The Worker Object: Created fields to store worker information, including contact details and roles.
* Creation Of Lookup Fields: Implemented lookup fields to establish relationships between objects and link relevant data.

# Milestone 6: Creation Of Page Layouts

* To Create A Page Layout In Fabrication Object For Drilling: Designed a specific layout for managing drilling tasks in fabrication.
* To Create A Page Layout In Fabrication Object For Cutting: Created a custom layout for handling cutting activities in fabrication.
* To Create A Page Layout In Fabrication Object For Folding: Developed a layout for tracking folding processes in the fabrication object.

# Milestone 7: Creation Of Record Types

* To Create A Record Type In Fabrication Object: Defined record types to differentiate between various tasks and processes within the fabrication object.

# Milestone 8: Validation Rule

* To Create A Validation Rule For Fabrication Object: Implemented a validation rule to ensure data integrity and correct input in the fabrication object.

# Milestone 9: Email Templates

* Upload Logo Into Salesforce: Uploaded the company logo to Salesforce to be used in email templates.
* Creation Of Letterhead For Salesforce: Designed a letterhead for consistent branding in Salesforce communications.
* Creation Of Letterhead For Email Purpose: Customized the letterhead specifically for email usage.
* Create Email Template: Developed email templates for standardized communication with clients and stakeholders.
* Create Email Alert: Set up email alerts to notify users based on specific triggers within the CRM application.

# Milestone 10: Flows

* Create Flow To Calculate Final Price On Fabrication Object Based On Material Type: Automated the price calculation for fabrication tasks considering the material type used.
* Create Flow To Calculate Final Price On Shed Work Object Based On Material Type: Developed a flow to determine the final cost of shed construction based on selected materials.
* Create Flow To Calculate Final Price On Pipe Lining Object Based On Material Type: Implemented a flow to automate price calculations for pipe lining projects depending on the material type.

# Milestone 11: Conclusion

The CRM application project was successfully completed, meeting all the specified requirements. The application provides a streamlined approach to managing various engineering tasks such as fabrication, shed work, and pipe lining. It offers a user-friendly interface with efficient workflows and automated processes, improving the overall efficiency of managing engineering projects. The system includes robust data handling, validation rules, customized email alerts, and dynamic pricing calculations, making it a comprehensive solution for engineering firms.