

Garage Management System

Documentation

TITLE

Garage Management System

By

Sneha Sharma

(sneha272003@gmail.com)

ABSTRACT OF THE PROJECT

The Garage Management System is created to make managing a garage or service center easier by automating tasks like vehicle tracking, billing details and feedbacks, service scheduling, and customer record-keeping.

It is built using Salesforce tools such as :

- **Salesforce** - The primary platform for building and deploying the system.
- **Skill Wallet** - A Salesforce project workspace used to manage tasks and skills related to the project.
- **Apex** - Salesforce's programming language, used for writing custom logic.
- **Visualforce** - A framework for building custom user interfaces in Salesforce.
- **Salesforce Lightning** - A UI framework for developing dynamic web apps for mobile and desktop devices.
- **Salesforce Objects and Fields** - Used for data modeling and structuring within the system.

All providing a user-friendly and responsive interface.

The goal is to help garages run more smoothly and efficiently by organizing daily tasks and improving workflow.

The system is designed to take care of the everyday tasks that can be time-consuming in a garage setting, helping staff stay organized and work more efficiently.

Plus, made sure it's scalable, so it can grow and adapt as the garage's needs evolve.

Overall, this project offers a practical solution for enhancing productivity and customer satisfaction in a garage setting.

INDEX

Section	Page No.
1. Introduction <ul style="list-style-type: none">• 1.1 Project Overview• 1.2 Purpose of the System• 1.3 Scope of the Project	5
2. Objective <ul style="list-style-type: none">• 2.1 Goals of the System• 2.2 Target Users• 2.3 Expected Outcomes	6
3.Tasks <ul style="list-style-type: none">3.1 Creating Developer Account3.2 Object Creation<ul style="list-style-type: none">• 3.2.1 Customer Details Object• 3.2.2 Appointment Object• 3.2.3 Service Records Object• 3.2.4 Billing Details and Feedback Object3.3 Tabs Creation<ul style="list-style-type: none">• 3.3.1 Creating Custom Tabs• Create Remaining Tabs3.4 The Lightning App<ul style="list-style-type: none">• 3.4.1 Creating a Lightning App3.5 Field Creation<ul style="list-style-type: none">• 3.5.1 Creation of Various Field Types	7 7-20 20-23 23-25 25-40

3.6 Validation Rules ● 3.6.1 Creating Validation Rules for Different Objects	40-44
3.7 Duplicate Rules ● 3.7.1 Creating Matching and Duplicate Rules	44-46
3.8 Profiles, Roles, and Users ● 3.8.1 Creating Profiles ● 3.8.2 Creating Roles ● 3.8.3 Creating Users	46-50 50-52 52-53
3.9 Public Groups and Sharing Settings ● 3.9.1 Creating Public Groups ● 3.9.2 Setting Up Sharing Settings	54 55
3.10 Flows and Apex ● 3.10.1 Creating Flows ● 3.10.2 Creating Apex Triggers and Handler	55-61 61-65
3.11 Reports and Dashboards ● 3.11.1 Creating Reports ● 3.11.2 Creating Dashboards	61-71 71-76
4. Conclusion ● 4.1 Summary of the Project ● 4.2 Challenges Faced ● 4.3 Future Enhancements	77

INTRODUCTION

1.1 Project Overview

The Garage Management System is a comprehensive solution designed to automate and manage garage operations. It leverages Salesforce to streamline customer management, appointment scheduling, service records, and billing.

1.2 Purpose of the System

This system aims to simplify and enhance the efficiency of garage operations by automating key tasks, improving data accuracy, and providing valuable insights through reports and dashboards.

1.3 Scope of the Project

The project includes creating custom objects, fields, validation rules, automation flows, and reporting tools within Salesforce to manage garage activities effectively.

OBJECTIVE

2.1 Goals of the System

- **Automate Operations:** Streamline appointment scheduling and service tracking.
- **Enhance Customer Service:** Improve the management of customer interactions and feedback.
- **Efficient Billing:** Handle billing processes smoothly and accurately.
- **Data Analysis:** Provide actionable insights through reports and dashboards.

2.2 Target Users

The system is intended for garage managers, service staff, and administrative personnel who need to manage and oversee garage operations.

2.3 Expected Outcomes

- **Improved Efficiency:** Automated processes reduce manual work and errors.
- **Better Customer Satisfaction:** Organized management of customer interactions leads to improved service.
- **Informed Decisions:** Data-driven reports and dashboards help in making better business decisions.

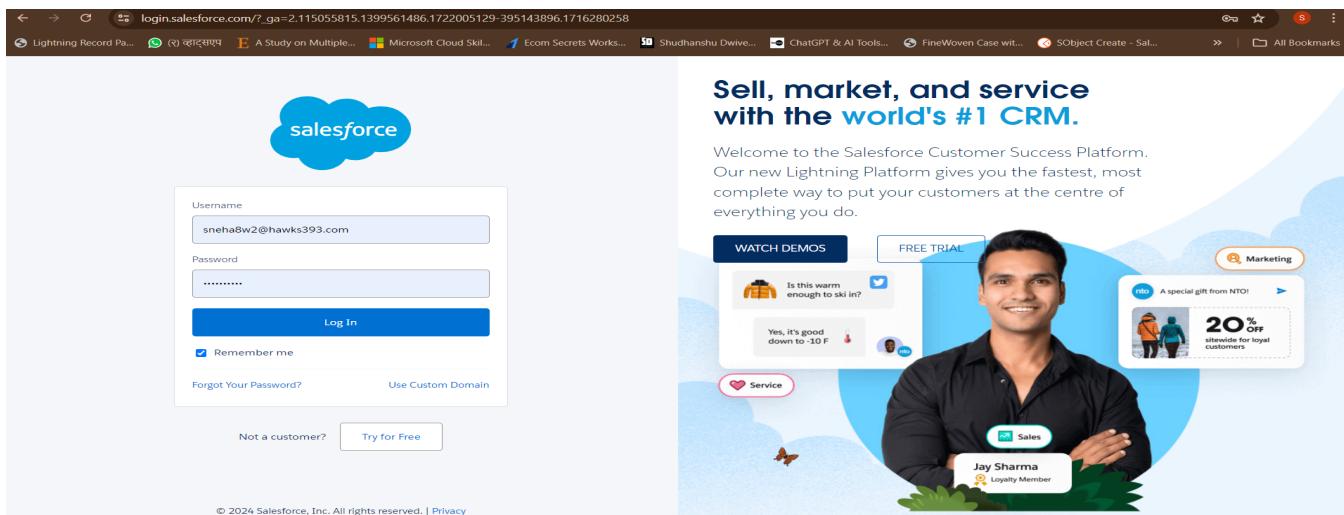
TASKS AND SCREENSHOTS OF THE PROCESS

3.1 Creating Developer Account

Task: Sign up for a Salesforce Developer account.

Process:

1. Visit [Salesforce Developer Sign-Up](#).
2. Complete the registration form with your details.
3. Verify your email to activate your account.
4. Log in to Salesforce with your new account.



3.2 Object Creation

3.2.1 Customer Details Object

Task: Create an object to store customer information.

Process:

1. Navigate to **Setup** in Salesforce.
2. In the Quick Find box, type **Object Manager** and select it.
3. Click **Create** and then **Custom Object**.

- Enter **Customer Details** as the label and **Customer_ID** as the record name.
- Select **Auto-Number** for the record name format and click **Save**.

The screenshot shows the Salesforce Object Manager page. At the top, there are tabs for Setup, Home, and Object Manager. A search bar says "Search Setup". On the right, there are icons for star, plus, question mark, gear, and bell. Below the tabs, it says "SETUP Object Manager 51+ Items, Sorted by Label". There is a "Quick Find" search bar and a "Schema Builder" button. A "Create" button with a dropdown arrow is also present. The main area is a table with columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The table lists various standard and custom objects like Account, Activity, Address, etc., with the newly created "Customer Details" object at the bottom.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Address	Address	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
AppLog	thsecurity_AppLog_c	Custom Object	Application logs	23/05/2024	✓
Appointment	Appointment_c	Custom Object		26/07/2024	✓
Appointment Category	AppointmentCategory	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Asset	Asset	Standard Object			

The screenshot shows the configuration page for the "Customer Details" object. At the top, it says "SETUP > OBJECT MANAGER Customer Details". On the left, there's a sidebar with options like Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main area is titled "Details" and contains sections for Description, API Name (Customer_Details_c), Custom (checked), Singular Label (Customer Details), Plural Label (Customer Details), Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status (Deployed), Help Settings (Standard salesforce.com Help Window), and Edit and Delete buttons.

Fields Created:

- Customer Name (Text)

The screenshot shows the Salesforce Object Manager page again. At the top, it says "SETUP Object Manager 1 Items, Sorted by Label". There is a "Quick Find" search bar and a "Schema Builder" button. A "Create" button with a dropdown arrow is also present. The main area is a table with columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The table now shows one item: "Customer Details" with API name "Customer_Details_c", Type "Custom Object", and Last Modified date "26/07/2024".

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Customer Details	Customer_Details_c	Custom Object		26/07/2024	✓

Customer Details

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

● Contact Number (Phone)

New Custom Field

Step 3. Establish field-level security

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cloud Kicks Admin	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Customer Details

Fields & Relationships

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

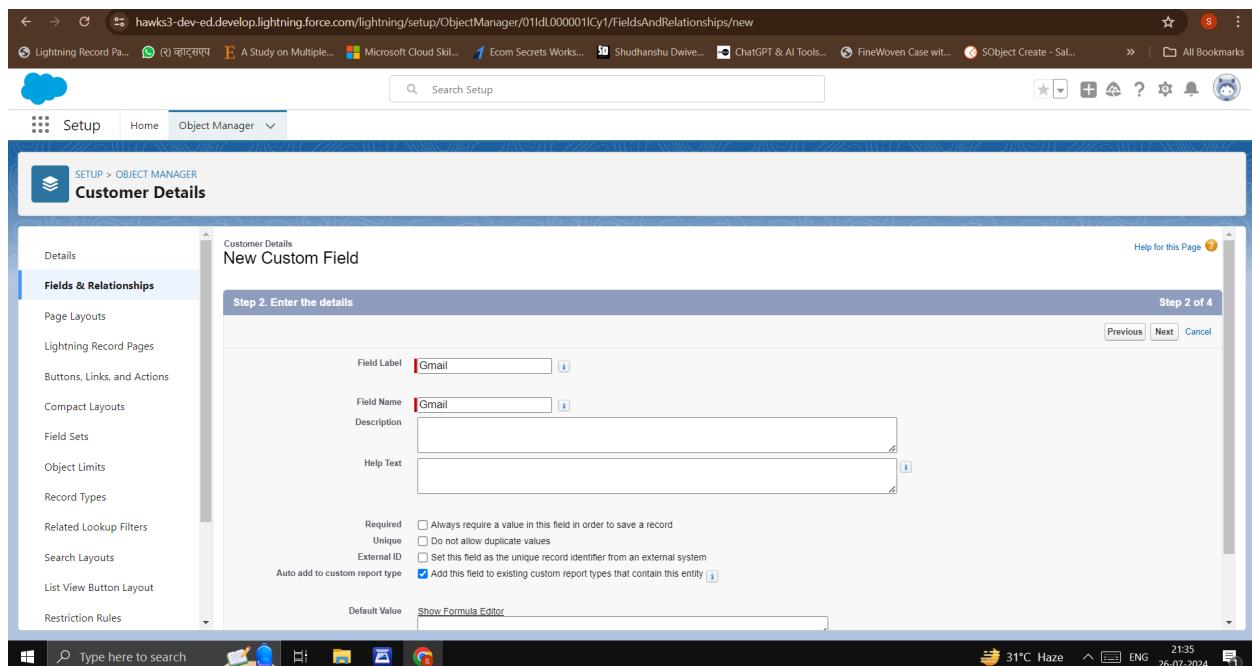
External Lookup Relationship	
Checkbox	Allows users to select a True (checked) or False (unchecked) value.
Currency	Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
Date	Allows users to enter a date or pick a date from a popup calendar.
Date/Time	Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Email	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation	Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Number	Allows users to enter any number. Leading zeros are removed.
Percent	Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist	Allows users to select a value from a list you define.

The screenshot shows the 'Customer Details' object setup page. On the left, a sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Field Sets. The main area is titled 'Step 2. Enter the details' and shows the configuration for a new field. The field is named 'Phone number' with the internal name 'Phone_number'. It is set to be required and added to existing report types. A formula editor is available for default values.

This screenshot continues from the previous one, showing 'Step 4. Add to page layouts'. The field 'Phone number' has been selected for inclusion in the 'Customer Details' layout. The sidebar remains the same, and the main area shows the field's properties and the option to add it to other layouts.

● Email Address (Email)

The screenshot shows the 'Fields & Relationships' section of the setup page. Under the 'Email' category, the 'Email' field type is selected. A detailed description of the email field is provided, stating that ownership and sharing are determined by the master record, and it supports rollup summary fields and mass emails.



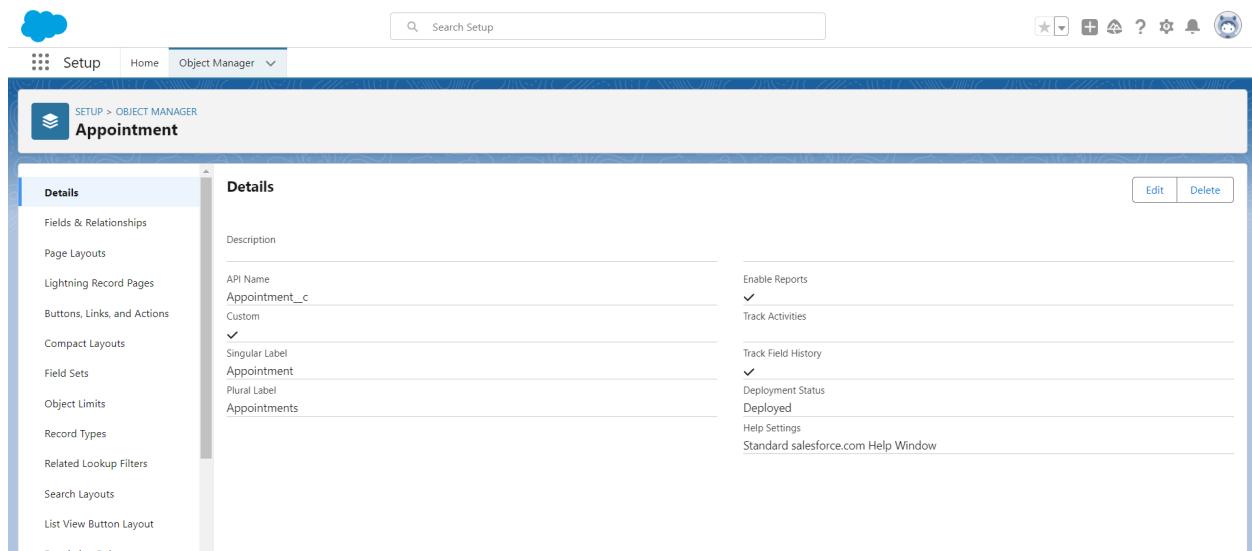
- **Address (Text Area)**

3.2.2 Appointment Object

Task: Create an object to manage customer appointments.

Process:

1. Go to **Setup > Object Manager > Create > Custom Object**.
2. Name it **Appointment** and use **Appointment_ID** as the record name.
3. Click **Save**.



hawk3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01dL000001ID1F/FieldsAndRelationships/new

Lightning Record Pa... (र) क्लाउडपैप A Study on Multiple... Microsoft Cloud Skil... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

hawk3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01dL000001ID1F/FieldsAndRelationships/new

Lightning Record Pa... (र) क्लाउडपैप A Study on Multiple... Microsoft Cloud Skil... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

hawk3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01dL000001ID1F/FieldsAndRelationships/new

Lightning Record Pa... (र) क्लाउडपैप A Study on Multiple... Microsoft Cloud Skil... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

[Lightning Record Pa...](#) [\(र\) कांट्रोल्यूप](#) [E A Study on Multiple...](#) [Microsoft Cloud Skill...](#) [Ecom Secrets Works...](#) [Shudhanshu Dwive...](#) [ChatGPT & AI Tools...](#) [FineWoven Case wit...](#) [SObject Create - Sal...](#) [All Bookmarks](#)

Setup Home Object Manager

Search Setup

Appointment

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules

Appointment New Relationship

Step 4. Establish field-level security for reference field Step 4 of 6

Field-Level Security for Profile	Visible	Read Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input type="checkbox"/>	<input type="checkbox"/>
B2B Reordering Portal Buyer Profile	<input type="checkbox"/>	<input type="checkbox"/>
Cloud Kicks Admin	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Help for this Page

Previous Next Cancel

[Lightning Record Pa...](#) [\(र\) कांट्रोल्यूप](#) [E A Study on Multiple...](#) [Microsoft Cloud Skill...](#) [Ecom Secrets Works...](#) [Shudhanshu Dwive...](#) [ChatGPT & AI Tools...](#) [FineWoven Case wit...](#) [SObject Create - Sal...](#) [All Bookmarks](#)

Setup Home Object Manager

Search Setup

Appointment

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules

Appointment New Relationship

Step 5. Add reference field to Page Layouts Step 5 of 6

Field Label	Customer Details	Data Type	Lookup	Field Name	Customer_Details	Description
Add Field	Page Layout Name	<input checked="" type="checkbox"/>				
	Appointment Layout	<input checked="" type="checkbox"/>				

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Help for this Page

Previous Next Cancel

[Lightning Record Pa...](#) [\(र\) कांट्रोल्यूप](#) [E A Study on Multiple...](#) [Microsoft Cloud Skill...](#) [Ecom Secrets Works...](#) [Shudhanshu Dwive...](#) [ChatGPT & AI Tools...](#) [FineWoven Case wit...](#) [SObject Create - Sal...](#) [All Bookmarks](#)

Setup Home Object Manager

Search Setup

Appointment

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules

Appointment New Relationship

Step 6. Add custom related lists Step 6 of 6

Field Label	Customer Details	Data Type	Lookup	Field Name	Customer_Details	Description
Related List Label	Appointments	<input type="checkbox"/>				

Specify the title that the related list will have in all of the layouts associated with the parent.

Related List Label

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Related List Page Layout Name Customer Details Layout

Append related list to users' existing personal customizations

Help for this Page

Previous Save & New Save Cancel

3

Fields Created:

- **Appointment Date** (Date/Time)
- **Service Type** (Picklist)
- **Customer ID** (Lookup - Customer Details)

3.2.3 Service Records Object

The screenshot shows the 'Object Manager' interface in Salesforce. On the left, a sidebar lists various configuration options like 'Fields & Relationships', 'Page Layouts', and 'Buttons, Links, and Actions'. The main panel is titled 'Details' for the 'Service records' object. It shows the API name as 'Service_records__c'. Under the 'Custom' section, the singular label is set to 'Service records' and the plural label is also 'Service records'. On the right, there are sections for 'Enable Reports' (checked), 'Track Activities', 'Track Field History' (checked), 'Deployment Status' (set to 'Deployed'), and 'Help Settings' (set to 'Standard salesforce.com Help Window'). At the bottom right are 'Edit' and 'Delete' buttons.

Task: Create an object to track service details.

Process:

1. Navigate to **Setup > Object Manager > Create > Custom Object**.
2. Name it **Service Records** and use **Service_ID** as the record name.
3. Click **Save**.

The screenshot shows the 'Object Manager' section within the Salesforce Setup. The top navigation bar includes links for 'Lightning Record Pa...', 'A Study on Multiple...', 'Microsoft Cloud Skill...', 'Ecom Secrets Works...', 'Shudhanshu Dwive...', 'ChatGPT & AI Tools...', 'FineWoven Case wit...', 'Object Create - Sal...', 'All Bookmarks', and a search bar. Below the navigation is a toolbar with icons for 'Setup', 'Home', 'Object Manager', and other setup functions. The main area is titled 'Object Manager' and shows a table with one item: 'Service records' (API Name: 'Service_records__c', Type: 'Custom Object', Last Modified: '26/07/2024', Deployed status: checked). There are buttons for 'Search Object', 'Schema Builder', and 'Create'.

Fields Created:

- **Service Date** (Date)
- **Service Cost** (Currency)
- **Service Description** (Text Area)
- **Appointment ID** (Lookup - Appointment)

The screenshot shows the Salesforce Setup interface under the Object Manager. A new field named "Service records" is being created. The "Fields & Relationships" tab is selected. In the "Data Type" section, the "Lookup Relationship" option is chosen. The "Master-Detail Relationship" sub-option is selected. The "Related To" dropdown is set to "Appointment". The right pane displays detailed information about the selected data type.

Data Type	Description
<input type="radio"/> None Selected	Select one of the data types below.
<input type="radio"/> Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
<input type="radio"/> Formula	A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
<input type="radio"/> Roll-Up Summary <small>[i]</small>	A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
<input checked="" type="radio"/> Lookup Relationship	Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
<input type="radio"/> Master-Detail Relationship	<ul style="list-style-type: none"> The relationship field is required on all detail records. The ownership and sharing of a detail record are determined by the master record. When a user deletes the master record, all detail records are deleted. You can create rollup summary fields on the master record to summarize the detail records. <p>The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.</p>
<input type="radio"/> External Lookup Relationship	Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
<input type="radio"/> Checkbox	Allows users to select a True (checked) or False (unchecked) value.
<input type="radio"/> Currency	Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
<input type="radio"/> Date	Allows users to enter a date or pick a date from a popup calendar.
<input type="radio"/> Date/Time	Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
<input type="radio"/> Email	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an

The screenshot shows the "New Relationship" wizard for the "Service records" object. Step 2, "Choose the related object", is displayed. The "Related To" dropdown is set to "Appointment". The right pane shows navigation buttons for the wizard.

Lightning Record Pa... (र) कार्यशाला A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

SETUP > OBJECT MANAGER Appointment

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules

Step 2. Enter the details Step 2 of 4

Field Label: Appointment Date

Field Name: Appointment_Date

Description:

Help Text:

Required: Always require a value in this field in order to save a record

Auto add to custom report type: Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

Use formula editing. Enclose text and picklist value API names in double quotes ('the_Text'), include numbers without quotes :25, show percentages as decimals (.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use \${CustomMetadata.Type__mdt RecordAPIName Field__c}

Previous Next Cancel

Lightning Record Pa... (र) कार्यशाला A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

SETUP > OBJECT MANAGER Service records

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules

New Relationship Step 3 of 6

Service records

Field Label: Appointment Date

Field Name: Appointment_Date

Description:

Help Text:

Child Relationship Name: Service_records

Required: Always require a value in this field in order to save a record

What to do if the lookup record is deleted? Don't allow deletion of the lookup record that's part of a lookup relationship.

Auto add to custom report type: Add this field to existing custom report types that contain this entity

Help for this Page

Previous Next Cancel

Lightning Record Pa... (र) कार्यशाला A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

SETUP > OBJECT MANAGER Service records

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules

Optional: create a filter to limit the records available to users in the lookup field. Tell me more

▼ Hide Filter Settings

Filter Criteria Insert Suggested Criteria Clear Filter Criteria

Field	Operator	Value / Field
Appointment: Appointment Date	-None-	Field: Appointment: Created Date
AND	Begin typing to search for a field...	less than Value
AND	Begin typing to search for a field...	-None- Value

Add Filter Logic... Required. The user-entered value must match filter criteria.
If it doesn't display this error message on save:
Value does not exist or does not match filter criteria.
Reset to default message

Optional. The user can remove the filter or enter values that don't match criteria.

Lookup Window Text: Add this informational message to the lookup window.

Active: Enable this filter

6

3.2.4 Billing Details and Feedback Object

Task: Create an object to manage billing details and customer feedback.

Process:

1. Go to **Setup > Object Manager > Create > Custom Object.**
2. Name it **Billing Details and Feedback** and use **Billing_ID** as the record name.
3. Click **Save.**

The screenshot shows the Salesforce Setup interface under the Object Manager tab. On the left, a sidebar lists various configuration options like Fields & Relationships, Page Layouts, and Buttons, Links, and Actions. The main area is titled 'Billing details and feedback' and contains a 'Details' section. The 'API Name' field is set to 'Billing_details_and_feedback__c'. Other settings include 'Custom' (checked), 'Singular Label' (Billing details and feedback), 'Plural Label' (Billing details and feedback), and 'Enable Reports' (checked). Deployment status is set to 'Deployed'.

The screenshot shows the Salesforce Setup interface under the Object Manager tab. The top navigation bar includes links for Lightning Record Pages, Home, and Object Manager. A search bar at the top right contains the text 'Billing details and feed'. The main area displays a table of objects. The first row in the table is for the 'Billing details and feedback' object, showing its API name 'Billing_details_and_feedback__c', type 'Custom Object', last modified date '26/07/2024', and deployment status '✓'.

hawk3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01dL000001IDAv/FieldsAndRelationships/view

Lightning Record Pa... (र) कार्यशाला A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

Search Setup

Billing details and feedback

Fields & Relationships
4 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Billing details and feedbackName	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

hawk3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01dL000001IDAv/FieldsAndRelationships/new

Lightning Record Pa... (र) कार्यशाला A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

Search Setup

Billing details and feedback

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

External Lookup Relationship The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Checkbox Allows users to select a True (checked) or False (unchecked) value.

Currency Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Date Allows users to enter a date or pick a date from a popup calendar.

Date/Time Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Email Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an

hawk3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01dL000001IDAv/FieldsAndRelationships/new

Lightning Record Pa... (र) कार्यशाला A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

Search Setup

Billing details and feedback

New Relationship

Step 2. Choose the related object

Select the other object to which this object is related.

Related To

Help for this Page ? Step 2 Previous Next Cancel

Previous Next Cancel

8

The screenshot shows the Salesforce Setup interface for creating a new object. The top navigation bar includes links for Lightning Record Pages, Microsoft Cloud Skills, Ecom Secrets Works, Shudhanshu Dwivedi, ChatGPT & AI Tools, FineWoven Case with, SObject Create - Sales, and All Bookmarks. The main area displays the 'Billing details and feedback' object's setup page under 'Fields & Relationships'. A sidebar on the left lists various layout types: Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules.

This screenshot shows Step 3 of 6 for creating a new relationship field. The field is named 'Service records' with the internal name 'Service_records'. It is a lookup type field. The 'Description' and 'Help Text' fields are empty. Under 'Child Relationship Name', it is set to 'Billing_details_and_feedback'. The 'Required' checkbox is checked, and the 'Clear the value of this field' radio button is selected. The 'What to do if the lookup record is deleted?' section has three options: 'Always require a value in this field in order to save a record' (unchecked), 'Clear the value of this field. You can't choose this option if you make this field required.' (checked), and 'Don't allow deletion of the lookup record that's part of a lookup relationship.' (unchecked). A checkbox at the bottom allows adding the field to existing custom report types.

This screenshot shows Step 4 of 6, where the user is selecting profiles for field-level security. The table lists various profiles, all of which have the 'Visible' checkbox checked and the 'Read-Only' checkbox unchecked. The profiles listed include Analytics Cloud Integration User, Analytics Cloud Security User, Cloud Kicks Admin, Contract Manager, Cross Org Data Proxy User, Custom: Marketing Profile, Custom: Sales Profile, Custom: Support Profile, Force.com - App Subscription User, and Force.com - Free User.

This screenshot shows Step 5 of 6, where the user is adding the field to page layouts. The field details are repeated: Field Label 'Service records', Data Type 'Lookup', Field Name 'Service_records', and Description empty. Below this, a table lists page layout names, all with the 'Add Field' checkbox checked. The page layout names listed are 'Billing details and feedback Layout' and 'Page Layout Name'. The 'Record Types' section is also visible at the bottom.

This screenshot shows Step 5 of 6 again, with the same field details and layout addition process. The 'Record Types' section is visible at the bottom. A large number '9' is located in the bottom right corner of the page.

The screenshot shows the Salesforce Setup interface under the Object Manager. A specific step in the process is highlighted: "Step 6. Add custom related lists". The configuration details for a new field named "Service_records" are shown, including its label, data type (Lookup), and field name. The "Related List Label" is set to "Billing details and feedback". Under "Add Related List", the "Service records Layout" is selected. The right side of the screen displays navigation links like "Previous", "Save & New", "Save", and "Cancel".

Fields Created:

- **Billing Date** (Date)
- **Amount** (Currency)
- **Payment Method** (Picklist)
- **Feedback Comments** (Text Area)

3.3 Tabs Creation

3.3.1 Creating Custom Tabs

Task: Create tabs for each custom object for easy navigation.

Process:

1. Navigate to **Setup > Tabs.**

The screenshot shows the Salesforce Setup interface under the "User Interface" section, specifically the "Tabs" page. A search bar at the top left contains the text "tabs". The main area displays three cards: "Get Started with Einstein Bots", "Mobile Publisher", and "Real-time Collaborative Docs". Below these cards, there is a "Most Recently Used" section. On the left sidebar, under "User Interface", there is a link labeled "Tabs".

2. Click **New** under Custom Tabs.

Setup Home Object Manager ▾

tabs

User Interface

Rename Tabs and Labels

Tabs

Didn't find what you're looking for?
Try using Global Search.

SETUP Tabs

New Custom Object Tab

Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#)

Object: Customer Details

Tab Style: Alarm clock

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: None

Enter a short description

Description:

Next Cancel

SETUP Tabs

Choose the user profiles for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each profile.

Apply one tab visibility to all profiles Default On

Apply a different tab visibility for each profile

Profile	Tab Visibility
Analytics Cloud Integration User	Default On
Analytics Cloud Security User	Default On

SETUP Tabs

Step 3. Add to Custom Apps

Step 3 of 3

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	<input type="checkbox"/> Include Tab
Platform (standard__Platform)	<input type="checkbox"/>
Sales (standard__Sales)	<input type="checkbox"/>
Service (standard__Service)	<input type="checkbox"/>
Marketing CRM Classic (standard__Marketing)	<input type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>
Community (standard__Community)	<input type="checkbox"/>
Site.com (standard__Sites)	<input type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input type="checkbox"/>
Content (standard__Content)	<input type="checkbox"/>
Analytics Studio (standard__Insights)	<input type="checkbox"/>
Automation (standard__flowsApp)	<input type="checkbox"/>

Append tab to users' existing personal customizations

Previous Save Cancel

SETUP Tabs

New Custom Object Tab

Step 1. Enter the Details Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#).

Object: Appointment

Tab Style: Bell

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: --None--

Enter a short description.

Description:

Next Cancel

New Custom Object Tab

Step 1. Enter the Details Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#).

Object: Service records

Tab Style: Desk

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: --None--

Enter a short description.

Description:

Next Cancel

SETUP Tabs

New Custom Object Tab

Step 1. Enter the Details Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#).

Object: Billing details and feedback

Tab Style: Umbrella

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: --None--

Enter a short description.

Description:

Next Cancel

- Select **Custom Object Tabs** and choose the objects created (e.g., Customer Details, Appointment).
- Follow the wizard to complete the tab creation process.

3.4 The Lightning App

3.4.1 Creating a Lightning App

Task: Create a Lightning App to integrate all tabs and objects.

Process:

- Go to **Setup > App Manager > New Lightning App.**

The screenshot shows the Salesforce App Manager interface. At the top, there's a search bar with 'app man' typed in. Below it, a navigation bar has 'Setup' selected. On the left, a sidebar shows 'Apps' and 'App Manager' is selected. A message says 'Didn't find what you're looking for? Try using Global Search.' The main area displays three cards: 'Get Started with Einstein Bots' (AI-powered bot), 'Mobile Publisher' (create branded mobile app), and 'Real-time Collaborative Docs' (transform productivity). Below these cards is a section titled 'Most Recently Used'.

The screenshot shows the Lightning Experience App Manager. At the top, there's a search bar with 'app man' typed in. Below it, a navigation bar has 'Setup' selected. On the left, a sidebar shows 'Apps' and 'App Manager' is selected. A message says 'Didn't find what you're looking for? Try using Global Search.' The main area displays a table with 21 items, sorted by App Name. The columns include App Name, Developer Name, Description, Last Modified Date, App Type, and Visibility. Examples of listed apps include All Tabs, Analytics Studio, App Launcher, Automation, Bolt Solutions, Community, Content, Data Manager, Digital Experiences, Lightning Usage App, Marketing CRM Classic, Platform, and Queue Management.

App Name ↑	Developer Name	Description	Last Modified Date	App Type	Visibility
1 All Tabs	AllTabSet		23/05/2024, 12:55 am	Classic	
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	23/05/2024, 12:55 am	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	23/05/2024, 12:55 am	Classic	✓
4 Automation	FlowsApp	Automate business processes and repetitive tasks.	16/06/2024, 9:07 am	Lightning	✓
5 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	23/05/2024, 12:55 am	Lightning	✓
6 Community	Community	Salesforce CRM Communities	23/05/2024, 12:55 am	Classic	✓
7 Content	Content	Salesforce CRM Content	23/05/2024, 12:55 am	Classic	✓
8 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	23/05/2024, 12:55 am	Lightning	✓
9 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	23/05/2024, 12:55 am	Lightning	✓
10 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	23/05/2024, 12:55 am	Lightning	✓
11 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	23/05/2024, 12:55 am	Classic	✓
12 Platform	Platform	The fundamental Lightning Platform	23/05/2024, 12:55 am	Classic	
13 Queue Management	QueueManagement	Create and manage queues for your business.	23/05/2024, 12:55 am	Lightning	✓

- Provide a name for the app (e.g., "Garage Management").

New Lightning App

App Details	App Branding
* App Name <input type="text" value="Garage Management Application"/>	Image <input type="button" value="Upload"/> Primary Color Hex Value <input type="text" value="#0070D2"/>
* Developer Name <input type="text" value="Garage Management Application"/>	Org Theme Options <input type="checkbox"/>
Description <input type="text" value="Enter a description..."/>	Use the app's image and color instead of the org's custom theme
App Launcher Preview	
<input type="button" value="Next"/>	

Progress: Step 1 of 4

11	Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	23/05/2024, 12:55 am	Classic	<input checked="" type="checkbox"/>
12	Platform	Platform	The fundamental Lightning Platform	23/05/2024, 12:55 am	Classic	<input type="checkbox"/>
13	Queue Management	QueueManagement	Create and manage queues for your business.	23/05/2024, 12:55 am	Lightning	<input checked="" type="checkbox"/>

New Lightning App

App Options

Navigation and Form Factor	Setup and Personalization
* Navigation Style <input checked="" type="radio"/> Standard navigation <input type="radio"/> Console navigation	Setup Experience <input checked="" type="radio"/> Setup (full set of Setup options) <input type="radio"/> Service Setup
* Supported Form Factors <input checked="" type="radio"/> Desktop and phone <input type="radio"/> Desktop <input type="radio"/> Phone	App Personalization Settings <input type="checkbox"/> Disable end user personalization of nav items in this app <input type="checkbox"/> Disable temporary tabs for items outside of this app <input type="checkbox"/> Use Omni-Channel sidebar
<input type="button" value="Back"/> <input type="button" value="Next"/>	

Progress: Step 2 of 4

11	Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	23/05/2024, 12:55 am	Classic	<input checked="" type="checkbox"/>
12	Platform	Platform	The fundamental Lightning Platform	23/05/2024, 12:55 am	Classic	<input type="checkbox"/>
13	Queue Management	QueueManagement	Create and manage queues for your business.	23/05/2024, 12:55 am	Lightning	<input checked="" type="checkbox"/>

New Lightning App

Utility Items (Desktop Only)

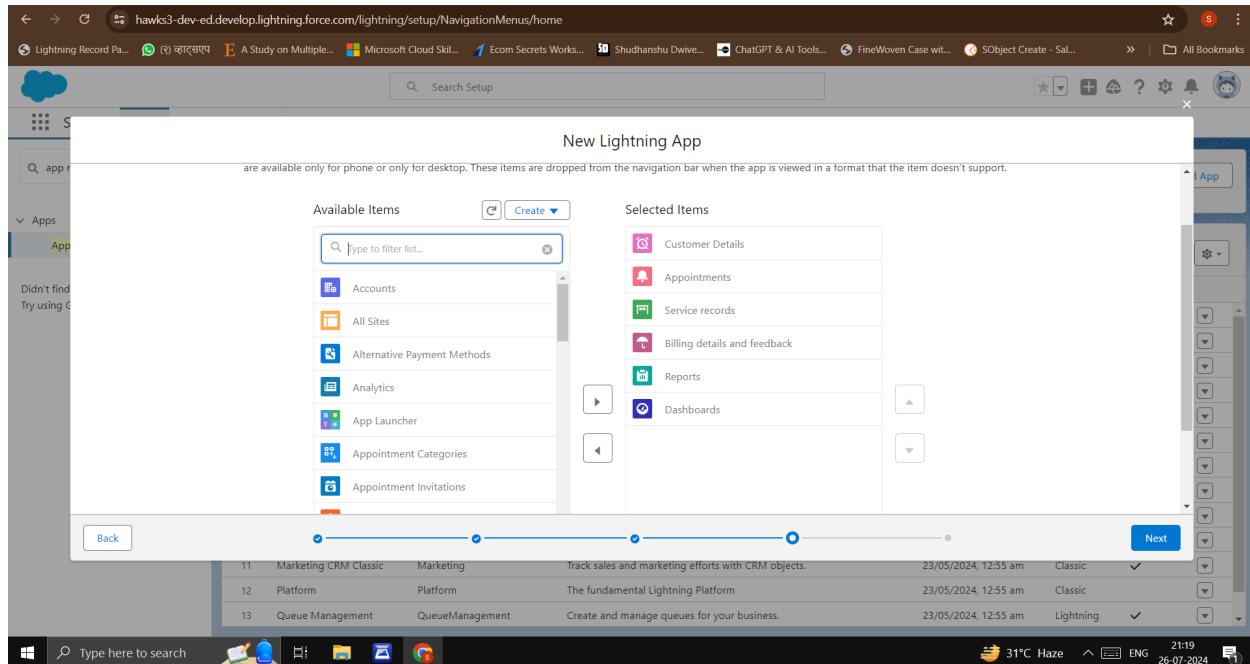
Give your users quick access to productivity tools and add background utility items to your app.

Add Utility Item	Utility Bar Alignment <input type="button" value="Default"/>
The utility bar is a fixed footer that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.	
<input type="button" value="Back"/> <input type="button" value="Next"/>	

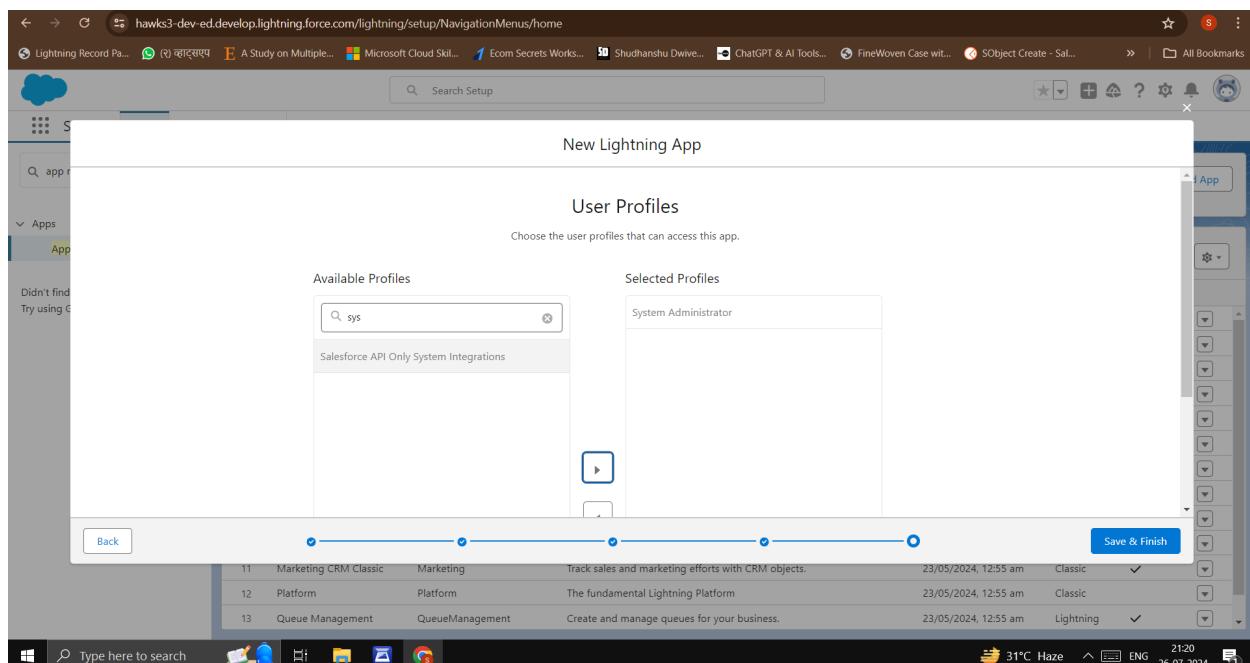
Progress: Step 3 of 4

11	Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	23/05/2024, 12:55 am	Classic	<input checked="" type="checkbox"/>
12	Platform	Platform	The fundamental Lightning Platform	23/05/2024, 12:55 am	Classic	<input type="checkbox"/>
13	Queue Management	QueueManagement	Create and manage queues for your business.	23/05/2024, 12:55 am	Lightning	<input checked="" type="checkbox"/>

4



3. Add the previously created tabs and objects.



4. Configure the app settings and click **Save**.

3.5 Field Creation

3.5.1 Creation of Various Field Types

Task: Create different field types in the custom objects.

Process:

1. Go to **Setup > Object Manager** > Select an object (e.g., Customer Details).

For Appointment

The screenshot shows the Salesforce Object Manager Fields & Relationships page for the Appointment object. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Field Sets. The main area displays a table titled 'Fields & Relationships' with 6 items, sorted by Field Label. The columns include FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment Date	Appointment_Date__c	Date		
Appointment Name	Name	Auto Number		
Created By	CreatedBy	Lookup(User)	✓	
Customer Details	Customer_Details__c	Lookup(Customer Details)	✓	
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	

The screenshot shows the Salesforce Object Manager Fields & Relationships new page for the Appointment object. The left sidebar lists various setup categories. The right pane shows a list of field types with descriptions. The 'Checkbox' type is selected.

- Formula
- Roll-Up Summary
- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship
- Checkbox
- Currency
- Date
- Date/Time
- Email
- Geolocation
- Number
- Percent

Descriptions for each field type:

- Formula: A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll-Up Summary: A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship: Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
- Master-Detail Relationship: Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create rollup summary fields on the master record to summarize the detail records.
- External Lookup Relationship: Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
- Checkbox: Allows users to select a True (checked) or False (unchecked) value.
- Currency: Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
- Date: Allows users to enter a date or pick a date from a popup calendar.
- Date/Time: Allows users to enter date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
- Email: Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
- Geolocation: Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
- Number: Allows users to enter any number. Leading zeros are removed.
- Percent: Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001ID1F/FieldsAndRelationships/new

Lightning Record Pa... (र) वादेशपा E A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

SETUP > OBJECT MANAGER Appointment

New Custom Field

Step 2 of 4

Step 2. Enter the details

Field Label: Maintenance service

Default Value: Checked Unchecked

Field Name: Maintenance_service

Description:

Help Text:

Auto add to custom report type: Add this field to existing custom report types that contain this entity

Previous Next Cancel

hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001ID1F/FieldsAndRelationships/new

Lightning Record Pa... (र) वादेशपा E A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

SETUP > OBJECT MANAGER Appointment

New Custom Field

Step 3 of 4

Step 3. Establish field-level security

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cloud Kicks Admin	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Select the profiles to which you want to grant edit access to this field. The field will be hidden from all profiles if you do not add it to field-level security.

Previous Next Cancel

hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001ID1F/FieldsAndRelationships/new

Lightning Record Pa... (र) वादेशपा E A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

SETUP > OBJECT MANAGER Appointment

New Custom Field

Step 4 of 4

Step 4. Add to page layouts

Page Layout Name	
Appointment Layout	<input checked="" type="checkbox"/>

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field Page Layout Name: Appointment Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

hawk3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001ID1F/FieldsAndRelationships/view

Lightning Record Pa... (र) कार्यपालिका A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment Date	Appointment_Date__c	Date		
Appointment Name	Name	Auto Number		
Created By	CreatedById	Lookup(User)		
Customer Details	Customer_Details__c	Lookup(Customer Details)		
Last Modified By	LastModifiedById	Lookup(User)		
Maintenance service	Maintenance_service__c	Checkbox		
Owner	OwnerId	Lookup(User/Group)		

hawk3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001ID1F/FieldsAndRelationships/view

Lightning Record Pa... (र) कार्यपालिका A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership of the detail records is determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a popup calendar.

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

hawk3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001ID1F/FieldsAndRelationships/new

Lightning Record Pa... (र) कार्यपालिका A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Help for this Page ?

Step 2 of 4

Field Label: Repairs

Default Value: Checked Unchecked

Field Name: Repairs

Description:

Help Text:

Auto add to custom report type Add this field to existing custom report types that contain this entity

Previous Next Cancel

8

[Lightning Record Pa...](#) [A Study on Multiple...](#) [Microsoft Cloud Skill...](#) [Ecom Secrets Works...](#) [Shudhanshu Dwive...](#) [ChatGPT & AI Tools...](#) [FineWoven Case wit...](#) [SObject Create - Sal...](#)

Appointment New Custom Field

Step 3 of 4

Field Label	Repairs	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Cloud Kicks Admin	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

[Lightning Record Pa...](#) [A Study on Multiple...](#) [Microsoft Cloud Skill...](#) [Ecom Secrets Works...](#) [Shudhanshu Dwive...](#) [ChatGPT & AI Tools...](#) [FineWoven Case wit...](#) [SObject Create - Sal...](#)

Appointment New Custom Field

Step 4 of 4

Field Label	Repairs	Data Type	Checkbox	Field Name	Repairs	Description
Add Field	<input checked="" type="checkbox"/>	Page Layout Name				
	<input checked="" type="checkbox"/>	Appointment Layout				

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

When finished, click Save & New to create more custom fields, or click Save if you are done.

[Lightning Record Pa...](#) [A Study on Multiple...](#) [Microsoft Cloud Skill...](#) [Ecom Secrets Works...](#) [Shudhanshu Dwive...](#) [ChatGPT & AI Tools...](#) [FineWoven Case wit...](#) [SObject Create - Sal...](#)

Appointment Fields & Relationships

8 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment Date	Appointment_Date__c	Date		
Appointment Name	Name	Auto Number		
Created By	CreatedBy	Lookup(User)		
Customer Details	Customer_Details__c	Lookup(Customer Details)		
Last Modified By	LastModifiedBy	Lookup(User)		
Maintenance service	Maintenance_service__c	Checkbox		
Owner	OwnerId	Lookup(User,Group)		
Repairs	Repairs__c	Checkbox		

9

hawk3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01Id000001ID1f/fieldsAndRelationships/new

Lightning Record Pa... (र) वादेशपां E A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

SETUP > OBJECT MANAGER Appointment

New Custom Field

Step 2 of 4

Field Label: Replacement Parts

Default Value: Unchecked

Field Name: Replacement_Parts

Description:

Help Text:

Auto add to custom report type: Add this field to existing custom report types that contain this entity

Previous Next Cancel

hawk3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01Id000001ID1f/FieldsAndRelationships/new

Lightning Record Pa... (र) वादेशपां E A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

SETUP > OBJECT MANAGER Appointment

Fields & Relationships

- External Lookup Relationship
- Checkbox
- Currency
- Date**
- Date/Time
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a popup calendar.

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

hawk3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01Id000001ID1f/FieldsAndRelationships/new

Lightning Record Pa... (र) वादेशपां E A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

SETUP > OBJECT MANAGER Appointment

Fields & Relationships

- Master-Detail Relationship
- External Lookup Relationship
- Checkbox
- Currency
- Date
- Date/Time
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)

source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a popup calendar.

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01dL000001D1F/FieldsAndRelationships/new

Lightning Record Pa... (र) कार्यशाप A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

Search Setup

Appointment

SETUP > OBJECT MANAGER

Step 2 of 4

Field Label: Service_Amount

Length: 18

Field Name: Service_Amount

Description:

Help Text:

Required: Always require a value in this field in order to save a record

Auto add to custom report type: Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01dL000001D1F/FieldsAndRelationships/new

Lightning Record Pa... (र) कार्यशाप A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

Search Setup

Appointment

SETUP > OBJECT MANAGER

Step 2 of 4

External Lookup Relationship

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Checkbox

Allows users to select a True (checked) or False (unchecked) value.

Currency

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Date

Allows users to enter a date or pick a date from a popup calendar.

Date/Time

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.

Email

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Geolocation

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Number

Allows users to enter any number. Leading zeros are removed.

Percent

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Phone

Allows users to enter any phone number. Automatically formats it as a phone number.

Picklist

Allows users to select a value from a list you define.

Picklist (Multi-Select)

Allows users to select multiple values from a list you define.

Text

Allows users to enter any combination of letters and numbers.

Text Area

Allows users to enter up to 255 characters on separate lines.

Text Area (Long)

Allows users to enter up to 131,072 characters on separate lines.

Text Area (Rich)

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01dL000001D1F/FieldsAndRelationships/new

Lightning Record Pa... (र) कार्यशाप A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

Search Setup

Appointment

SETUP > OBJECT MANAGER

Step 2 of 4

Field Label: Vehicle_number_plate

Length: 10

Field Name: Vehicle_number_plate

Description:

Help Text:

Required: Always require a value in this field in order to save a record

Unique: Do not allow duplicate values

Treat "ABC" and "abc" as duplicate values (case insensitive):

Treat "ABC" and "abc" as different values (case sensitive):

Set this field as the unique record identifier from an external system:

hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01dL000001D1F/FieldsAndRelationships/new

Lightning Record Pa... (र) कार्यशाप A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

Search Setup

Appointment

SETUP > OBJECT MANAGER

New Custom Field

Step 2 of 4

Field Label: Vehicle number plate

Please enter the maximum length for a text field below.

Length: 10

Field Name: Vehicle_number_plate

Description:

Help Text:

Required: Always require a value in this field in order to save a record

Unique: Do not allow duplicate values

Treat "ABC" and "abc" as duplicate values (case insensitive):

Treat "ABC" and "abc" as different values (case sensitive):

Set this field as the unique record identifier from an external system:

The screenshot shows the Salesforce Object Manager interface for the 'Appointment' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled 'New Custom Field' under 'Step 3. Establish field-level security'. The field is named 'Vehicle number plate', has a data type of 'Text', and a field name of 'Vehicle_number_plate'. A note says 'Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.' A table below shows field-level security settings for various profiles, with most checkboxes checked.

Field Level Security for Profile	Visible	Read Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
B2B Reordering Portal Buyer Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cloud Kicks Admin	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

SETUP > OBJECT MANAGER

Appointment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Field Label: Vehicle number plate
Data Type: Text
Field Name: Vehicle_number_plate
Description:

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

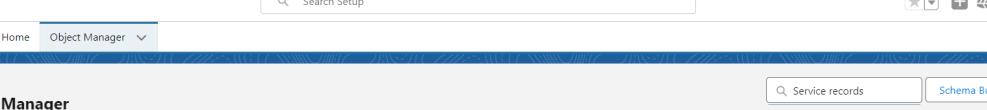
Add Field Page Layout Name
 Appointment Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Step 4 of 4

Previous Save & New Save Cancel

For Services Records



The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with links like 'Lightning Record Pa...', '(र) कार्यशाला', 'A Study on Multiple...', 'Microsoft Cloud Skill...', 'Ecom Secrets Works...', 'Shudhanshu Dwivedi...', 'ChatGPT & AI Tools...', 'FineWoven Case wit...', 'Object Create - Sal...', and 'All Bookmarks'. Below the navigation bar is a search bar labeled 'Search Setup'. The main header has a blue cloud icon, the word 'Setup', and a dropdown menu 'Object Manager'. The main content area has a title 'SETUP Object Manager' with a sub-note '1 items. Sorted by Label'. There's a search bar for 'Service records', a 'Schema Builder' button, and a 'Create' button. A table lists one item: 'Service records' (Label), 'Service_records__c' (API Name), 'Custom Object' (Type), and '26/07/2024' (Last Modified). The 'Deployed' column shows a checkmark.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Service records	Service_records__c	Custom Object		26/07/2024	✓

2

hawk3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001ID4t/FieldsAndRelationships/view

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment Date	Appointment_Date__c	Lookup(Appointment)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Service recordsName	Name	Auto Number		✓

hawk3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001ID4t/FieldsAndRelationships/view

hawk3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001ID4t/FieldsAndRelationships/new

Service records
New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label: Quality Check Status

Default Value: Checked Unchecked

Field Name: Quality_Check_Status

Description:

Help Text:

Auto add to custom report type Add this field to existing custom report types that contain this entity

3

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment Date	Appointment_Date__c	Date		
Appointment Name	Name	Auto Number		
Created By	CreatedById	Lookup(User)		
Customer Details	Customer_Details__c	Lookup(Customer Details)		
Last Modified By	LastModifiedById	Lookup(User)		
Maintenance service	Maintenance_service__c	Checkbox		
Owner	OwnerId	Lookup(User,Group)		
Repairs	Repairs__c	Checkbox		
Replacement Parts	Replacement_Parts__c	Checkbox		

Fields & Relationships

- Master-Detail Relationship
- External Lookup Relationship
- Checkbox
- Currency
- Date
- Date/Time
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)

New Custom Field

Step 2. Enter the details

Field Label: Service Status

Values:

- Use global picklist value set
- Enter values, with each value separated by a new line

Started
Completed

Field Name: Service_Status

Description:

Help for this Page

Step 2 of 4

Previous Next Cancel

4

hawk3-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01Id000001ID4t/FieldsAndRelationships/new

Lightning Record Pa... (र) कार्यशाला E A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwivedi... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

SETUP > OBJECT MANAGER Service records

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules

New Custom Field

Step 3. Establish field-level security Step 3 of 4

Help for this Page

Field Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cloud Kicks Admin	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

hawk3-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01Id000001ID4t/FieldsAndRelationships/new

Lightning Record Pa... (र) कार्यशाला E A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwivedi... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

SETUP > OBJECT MANAGER Service records

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules

New Custom Field

Step 4. Add to page layouts Step 4 of 4

Help for this Page

Add Field Page Layout Name
<input checked="" type="checkbox"/> Service records Layout

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

When finished, click Save & New to create more custom fields, or click Save if you are done.

hawk3-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01Id000001ID4t/FieldsAndRelationships/new

Lightning Record Pa... (र) कार्यशाला E A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwivedi... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

SETUP > OBJECT MANAGER Service records

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules

Step 1. Choose the field type Step 1

Next Cancel

Specify the type of information that the custom field will contain.

Data Type

None Selected Select one of the data types below.

Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Master-Detail Relationship Creates a relationship that links this object to another object whose data is stored outside the Salesforce org.

External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

5

hawk3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01Id000001ID4T/FieldsAndRelationships/new

Lightning Record Pa... (र) वादेशपा E A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

SETUP > OBJECT MANAGER Service records

New Custom Field

Step 2. Choose output type

Field Label: service date

Field Name: service_date

Auto add to custom report type: Add this field to existing custom report types that contain this entity

Formula Return Type

- None Selected
- Checkbox
- Currency
- Date
- Date/Time
- Number

Select one of the data types below:

Calculate a boolean value
Example: TODAY() > CloseDate

Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: Gross Margin = Amount - Cost_C

Calculate a date, for example, by adding or subtracting days to other dates.
Example: Reminder Date = CloseDate - 7

Calculate a datetime, for example, by adding a number of hours or days to another datetime.
Example: Next = NOW() + 1

Calculate a numeric value
Example: Percentage = (Actual - Budget) / Budget * 100

hawk3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01Id000001ID4T/FieldsAndRelationships/new

Lightning Record Pa... (र) वादेशपा E A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

SETUP > OBJECT MANAGER Service records

service date (Date) =
createdDate

Check Syntax: No syntax errors in merge fields or functions. (Compiled size: 20 characters)

Description:

A dropdown menu shows available functions: ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN. An "Insert Selected Function" button is present.

hawk3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01Id000001ID4T/FieldsAndRelationships/new

Lightning Record Pa... (र) वादेशपा E A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

SETUP > OBJECT MANAGER Service records

New Custom Field

Step 3. Enter formula

Enter your formula and click Check Syntax.
Example: Reminder Date = CloseDate

Simple Formula Advanced Formula

Insert Field

service date (Date) =
createdDate

Insert Field

Select a field, then click Insert. Labels followed by a ">" indicate that there are more fields available.

Service records > Appointment Date
\$Api > Appointment Date >
\$CustomMetadata > Created By >
\$Organization > Created By ID
\$Profile > Created Date
\$System > Last Modified By >
\$User > Last Modified By ID
\$UserRole > Last Modified Date
Owner (Queue) >

You have selected:
Created Date
Type: Date/Time
API Name: CreatedDate

Insert

Help for this Page

Step 3 of 5

Previous Next Cancel

Quick Tips

- Getting Started
- Operators & Functions

Close

Insert Selected Function

6

The screenshot shows the 'Service records' object in the Object Manager. A new custom field 'service_date' is being created. The 'Fields & Relationships' tab is selected. The field details are as follows:

- Field Label:** service date
- Data Type:** Formula
- Field Name:** service_date
- Description:**

The security section shows field-level security for various profiles. The 'Visible' column has checked boxes for all profiles listed, while the 'Read-Only' column has checked boxes for Analytics Cloud Security User, Cloud Kicks Admin, Contract Manager, Cross Org Data Proxy User, Custom Marketing Profile, and Custom Sales Profile.

The screenshot shows the 'Service records' object in the Object Manager. A new custom field 'service_date' is being created. The 'Fields & Relationships' tab is selected. The field details are as follows:

- Field Label:** service date
- Data Type:** Formula
- Field Name:** service_date
- Description:**

The page layout section shows the 'Add Field' step. Under 'Page Layout Name', 'Service records Layout' is selected. The 'Save & New' button is visible at the bottom right.

For Billing Details and Feedbacks

The screenshot shows the 'Billing details and feedback' object in the Object Manager. The 'Fields & Relationships' tab is selected. A list of field types is shown:

- Formula**: A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll-Up Summary**: A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship**: Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
- Master-Detail Relationship**: Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create rollup summary fields on the master record to summarize the detail records.
- External Lookup Relationship**: Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
- Checkbox**: Allows users to select a True (checked) or False (unchecked) value.
- Currency**: Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
- Date**: Allows users to enter a date or pick a date from a popup calendar.
- Date/Time**: Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
- Email**: Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
- Geolocation**: Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
- Number**: Allows users to enter any number. Leading zeros are removed.
- Percent**: Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

7

hawk3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001lDAv/FieldsAndRelationships/new

Lightning Record Pa... (र) कार्यपालिका A Study on Multiple... Microsoft Cloud Skil... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... Previous Next Cancel

Setup Home Object Manager

Billing details and feedback

Details

Fields & Relationships

Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules

Field Label: Payment Paid
Length: 18
Field Name: Payment_Paid
Description:
Help Text:
Required: Always require a value in this field in order to save a record
Auto add to custom report type: Add this field to existing custom report types that contain this entity
Default Value: Show Formula Editor
Use formula syntax: Enclose text and picklist value API names in double quotes ("the_Value"), include numbers without quotes (12), show percentages as decimals (.10), and express date calculations in the standard format "Today() + 7". To reference a field from a Custom Metadata type record use "CustomMetadataType__RecordName__Field__c".

hawk3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001lDAv/FieldsAndRelationships/new

Lightning Record Pa... (र) कार्यपालिका A Study on Multiple... Microsoft Cloud Skil... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... Previous Next Cancel

Setup Home Object Manager

Billing details and feedback

Details

Fields & Relationships

Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules

Field Label: Payment Paid
Data Type: Currency
Field Name: Payment_Paid
Description:
Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cloud Kicks Admin	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Force.com - App Subscription User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Force.com - Free User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

hawk3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001lDAv/FieldsAndRelationships/new

Lightning Record Pa... (र) कार्यपालिका A Study on Multiple... Microsoft Cloud Skil... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... Help for this Page Step 4 of 4 Previous Save & New Save Cancel

Setup Home Object Manager

Billing details and feedback

New Custom Field

Step 4. Add to page layouts

Field Label: Payment Paid
Data Type: Currency
Field Name: Payment_Paid
Description:
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
 Add Field Page Layout Name
 Billing details and feedback Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.

Previous Save & New Save Cancel

hawks3-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IdL000001IDAv/FieldsAndRelationships/new

Lightning Record Pa... (र) व्हाट्सएप A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

Billing details and feedback

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a popup calendar.

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Data/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

Allows users to enter up to 255 characters on separate lines.

Allows users to enter up to 131,072 characters on separate lines.

Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

hawks3-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IdL000001IDAv/FieldsAndRelationships/new

Lightning Record Pa... (र) व्हाट्सएप A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

Billing details and feedback

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules

New Custom Field

Step 2. Enter the details

Help for this Page

Step 2 of 4

Previous Next Cancel

Field Label: Rating for service

Please enter the maximum length for a text field below.

Length: 1

Field Name: Rating_for_service

Description:

Help Text:

Required: Always require a value in this field in order to save a record

Unique: Do not allow duplicate values

External ID: Set this field as the unique record identifier from an external system

Treat "ABC" and "abc" as duplicate values (case insensitive)

Treat "ABC" and "abc" as different values (case sensitive)

hawks3-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01IdL000001IDAv/FieldsAndRelationships/new

Lightning Record Pa... (र) व्हाट्सएप A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

Billing details and feedback

Details

Fields & Relationships

- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules

source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.

Allows users to enter a date or pick a date from a popup calendar.

Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Data/Time field.

Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.

Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.

Allows users to enter any number. Leading zeros are removed.

Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.

Allows users to enter any phone number. Automatically formats it as a phone number.

Allows users to select a value from a list you define.

Allows users to select multiple values from a list you define.

Allows users to enter any combination of letters and numbers.

9

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar lists various setup categories like Page Layouts, Lightning Record Pages, and Field Sets. The main area is titled 'Billing details and feedback New Custom Field' and is on 'Step 2. Enter the details'. The 'Field Label' is set to 'Payment Status'. Under 'Values', the 'Enter values, with each value separated by a new line' option is selected, and the input field contains 'Pending' and 'Completed'. Other options like 'Display values alphabetically' and 'Use first value as default value' are unchecked. The 'Field Name' is 'Payment_Status'.

2. Click **Fields & Relationships** > **New**.
3. Choose the field type (Text, Picklist, Date, Currency, etc.).
4. Enter the field details and click **Save**.

Examples of Fields:

- **Text Field:** Customer Name
- **Picklist Field:** Service Type
- **Date Field:** Appointment Date
- **Currency Field:** Service Cost

3.6 Validation Rules

3.6.1 Creating Validation Rules

Task: Set up validation rules to ensure data accuracy.

Process:

1. Navigate to **Setup** > **Object Manager** > Select an object (e.g., Appointment).

The screenshot shows the 'Validation Rules' section for the 'Appointment' object. The left sidebar lists various setup categories. The main area shows a table with columns: RULE NAME, ERROR LOCATION, ERROR MESSAGE, ACTIVE, and MODIFIED BY. A message at the bottom states 'No items to display.' There is a 'New' button in the top right corner.

For Appointment

2. Click Validation Rules > New.

The screenshot shows the Salesforce Setup interface for creating a new Validation Rule. The left sidebar lists various object configuration options like Details, Fields & Relationships, Page Layouts, etc. The main panel is titled "Appointment Validation Rule" and contains fields for "Rule Name" (set to "Vehicle"), "Active" status (checked), and a "Description" (also set to "Vehicle"). Below these, the "Error Condition Formula" field contains the formula "NOT (REGEX(Vehicle_number_plate__c , "[a-zA-Z]{2}[0-9]{2}[a-zA-Z]{2}[0-9]{4}"))". A dropdown menu for functions is open, showing options like ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, and ABS(number). A "Quick Tips" box is visible on the right, and a note at the bottom indicates that the formula must return true for the save to fail.

3. Define the rule criteria and error message.

The screenshot shows the continuation of the Validation Rule setup. The "Error Message" section is filled with the example "Discount percent cannot exceed 30%" and the message "Please enter valid number". The "Error Location" is set to "Field: Vehicle number plate". The "Check Syntax" button is visible, and a note says "No errors found". The formula field still contains "NOT (REGEX(Vehicle_number_plate__c , "[a-zA-Z]{2}[0-9]{2}[a-zA-Z]{2}[0-9]{4}"))".

4. Click Save.

Example Validation Rule: Ensure the appointment date is always in the future.

- **Formula:** Appointment_Date__c > TODAY()

Repeating this process for Service Records

hawk3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001ID4T/ValidationRules/view

Lightning Record Pa... (र) लाइटिंगपे A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup Home Object Manager Search Setup

Service records

Validation Rules
0 items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
No items to display.				

Service records Validation Rule

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit

Rule Name: service_status_note
Active:

Description:

Error Condition Formula

Example: Discount_Percent > 0.30 More Examples...
Display an error if Discount is more than 30%
If this formula expression is true, display the text defined in the Error Message area

NOT(ISPIRCVAL(Service_Status__c , "Completed"))

Functions

- All Function Categories --
- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN
- Insert Selected Function
- ABS(number)

Error Message

Example: Discount percent cannot exceed 30%
This message will appear when Error Condition formula is true
Error Message: still it is pending

This error message can either appear at the top of the page or below a specific field on the page
Error Location: Top of Page Field / Service Status

Save Save & New Cancel

Now for Billing details and feedbacks

SETUP > OBJECT MANAGER
Billing details and feedback

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY

SETUP > OBJECT MANAGER
Billing details and feedback

Billing details and feedback Validation Rule

Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.

Validation Rule Edit

Help for this Page ?

Rule Name: rating_should_be_less_than_5

Active:

Description:

Error Condition Formula

Example: Discount_Percent > 0.30 [More Examples...](#)

If this formula expression is true, display the text defined in the Error Message area.

Functions

Insert Field Rating_for_service__c Insert Operator NOT

NOT(REGEX(Rating_for_service__c , "[1-5](1)"))

Quick Tips

- Operators & Functions

The screenshot shows the Salesforce Object Manager interface. A validation rule is being edited. The formula is: NOT(REGEX(Rating_for_service__c , "[1-5](1)")). A dropdown menu is open over the formula, showing various functions. Below the formula, there's an 'Error Message' section with an example ('Discount percent cannot exceed 30%'), an input field for the error message ('rating should be from 1 to 5'), and a dropdown for 'Error Location' ('Top of Page' or 'Field').

3.7 Duplicate Rules

3.7.1 Creating Matching and Duplicate Rules

Task: Set up rules to avoid duplicate records.

Process:

1. Go to **Setup > Duplicate Management > Matching Rules.**

The screenshot shows the Matching Rules page in the Salesforce setup. The sidebar shows 'Data' and 'Duplicate Management'. Under 'Matching Rules', there's a search bar and a link to 'Create New View'. The main area shows a table of matching rules:

Action	Rule Name	Object	Status	Description	Last Modified Date	Last Modified By
Deactivate	Standard Account Matching Rule	Account	Active	Matching rule for account records. More info	23/05/2024	SShar
Deactivate	Standard Contact Matching Rule	Contact	Active	Matching rule for contact records. More info	23/05/2024	SShar
Deactivate	Standard Lead Matching Rule	Lead	Active	Matching rule for lead records. More info	23/05/2024	SShar

The screenshot shows the Salesforce Setup interface for creating a new Matching Rule. The left sidebar is collapsed, and the main area is titled "Matching Rules". A sub-header "New Matching Rule" is displayed. The first step, "Step 1: Select object", is active. It asks to select the object for the rule, with "Customer Details" selected in the dropdown. Navigation buttons "Next" and "Cancel" are at the bottom right.

This screenshot continues the rule creation process. The "Rule Details" section is shown, containing fields for Object (Customer Details), Rule Name (Matching customer details), Unique Name (Matching_customer_details), and Description (empty). The "Matching Criteria" section follows, which includes a table for defining field comparisons. The table has columns for Field, Matching Method, and Match Blank Fields. It lists three criteria: "Gmail Exact AND", "Phone number Exact AND", and two additional rows where "Exact" is selected for both fields. Navigation buttons "Previous", "Save", and "Cancel" are visible at the top right.

The final screenshot shows the "Matching Rule Detail" view for the created rule. The rule name is "Matching customer details" and its unique name is "Matching_customer_details". The description is empty. The matching criteria are listed as "(customer_details: Gmail EXACT MatchBlank = FALSE) AND (customer_details: Phone_number Exact MatchBlank = FALSE)". The status is "Inactive". The "Created By" and "Modified By" fields show "Sneha Sharma" with the timestamp "27/07/2024, 4:59 pm". A large number "5" is overlaid in the bottom right corner.

Create a matching rule to define duplicate criteria.

3. Go to **Duplicate Rules** and set up rules to prevent or alert on duplicates.

Example Rule: Match customers by name and phone number.

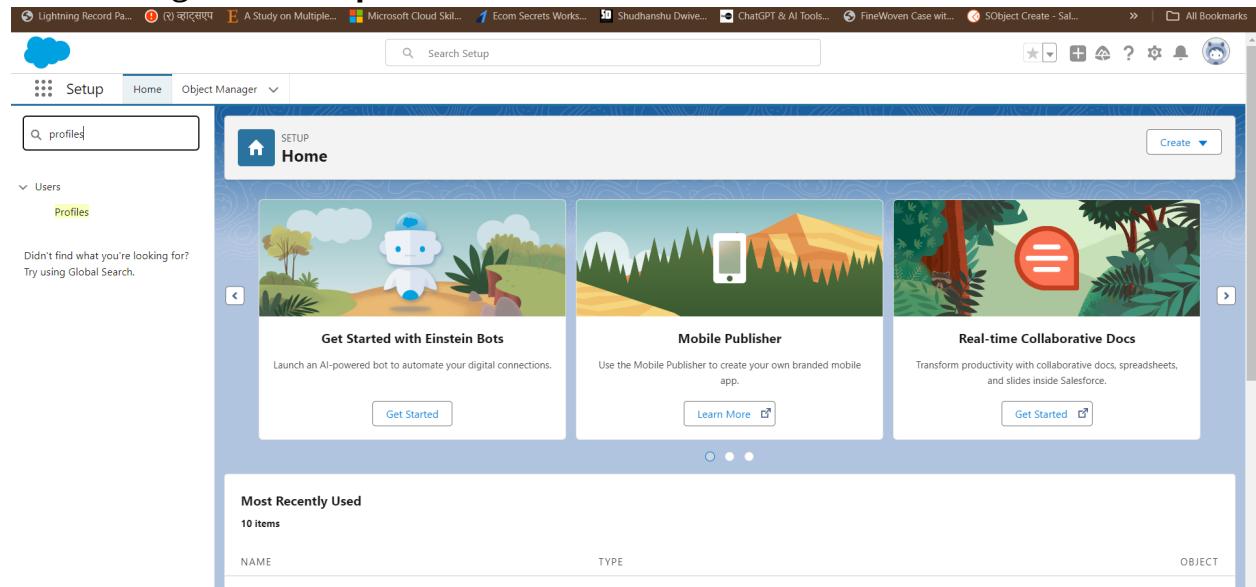
3.8 Profiles, Roles, and Users

3.8.1 Creating Profiles

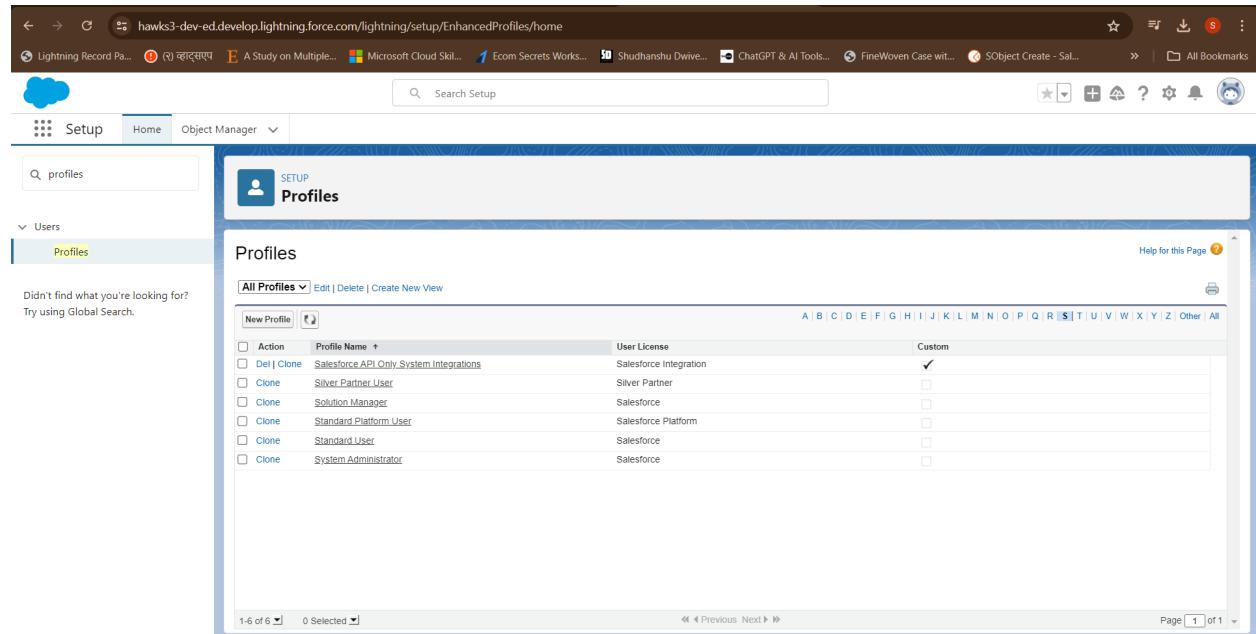
Task: Create profiles for different user roles.

Process:

1. Navigate to **Setup > Profiles > New Profile**.



The screenshot shows the Salesforce Setup Home page. In the top left, there's a search bar with 'profiles' typed in. Below it, under 'Users', the 'Profiles' tab is selected. A message says 'Didn't find what you're looking for? Try using Global Search.' On the right, there are three cards: 'Get Started with Einstein Bots', 'Mobile Publisher', and 'Real-time Collaborative Docs'. Below these is a section titled 'Most Recently Used' with 10 items, showing columns for NAME, TYPE, and OBJECT. The first item is 'Matching customer details' under 'Matching Rule'.



The screenshot shows the 'Profiles' list page. At the top, there's a dropdown 'All Profiles' and buttons for 'Edit | Delete | Create New View'. Below is a table with columns: Action, Profile Name, User License, and Custom. The table lists several profiles: 'Salesforce API Only System Integrations' (User License: Salesforce Integration, Custom: checked), 'Silver Partner User' (User License: Silver Partner, Custom: unchecked), 'Solution Manager' (User License: Salesforce, Custom: unchecked), 'Standard Platform User' (User License: Salesforce Platform, Custom: unchecked), 'Standard User' (User License: Salesforce, Custom: unchecked), and 'System Administrator' (User License: Salesforce, Custom: unchecked). Navigation links at the bottom include 'A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All' and '1-6 of 6 | 0 Selected | Page 1 of 1'.

Search Setup

Profiles

Clone Profile

You must select an existing profile to clone from.

Existing Profile: Standard User
User License: Salesforce
Profile Name: Manager

Save Cancel

Search Setup

Profiles

Profile: sales person

Profile Detail

Name	sales person	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce Platform		
Description			
Created By	Sneha Sharma, 27/07/2024, 10:43 pm	Modified By	Sneha Sharma, 27/07/2024, 10:43 pm
Page Layouts			
Standard Object Layouts		Global	Invoice Line
Email Application		Global Layout [View Assignment]	Invoice Line Layout [View Assignment]
Home Page Layout		Not Assigned [View Assignment]	Lead Layout [View Assignment]
Account		Home Page Default [View Assignment]	Object Milestone [View Assignment]
Alternative Payment Method		Account Layout [View Assignment]	Operating Hours [View Assignment]
		Alternative Payment Method Layout	Order Layout

Search Setup

SETUP Profiles

Legal Entities, Locations, Location Groups, Location Group Assignments, Macros, Work Plan Templates, Work Step Templates, Work Types, Work Type Groups

Custom Object Permissions:

- AppLogs:** Read, Create, Edit, Delete, View All, Modify All
- Appointments:** Read, Create, Edit, Delete, View All, Modify All
- Billing details and feedback:** Read, Create, Edit, Delete, View All, Modify All

Platform Event Permissions:

- AppLogEvents:** Basic Access (Read, Create)

Session Settings:

Search Setup

SETUP Profiles

Appointments, Billing details and feedback, Research Proposal, Service records

Platform Event Permissions:

- AppLogEvents:** Basic Access (Read, Create)

Session Settings:

- Session Times Out After: 8 hours of inactivity
- Session Security Level Required at Login: None

Password Policies:

- User password expires in: Never expires
- Enforce password history: 3 passwords remembered
- Minimum password length: 8
- Password complexity requirement: Must include alpha and numeric characters
- Password question requirement: Cannot contain password
- Maximum invalid login attempts: 10
- Lockout effective period: 15 minutes
- Obscure secret answer for password resets:

hawk3-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/home

Search Setup

SETUP Profiles

All Profiles | Edit | Delete | Create New View

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Salesforce API Only System Integrations	Salesforce Integration	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/>	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/>	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	System Administrator	Salesforce	<input type="checkbox"/>

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

1-6 of 6 | 0 Selected | << Previous Next >> | Page 1 of 1

Lightning Record Pa... (4) कार्यसभा E A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case with... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

Search Setup

Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile: Standard Platform User
User License: Salesforce Platform
Profile Name: sales person

Save Cancel

Lightning Record Pa... (4) कार्यसभा E A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case with... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

Search Setup

Profiles

Profile sales person

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges](#) | [Enabled Apex Class Access](#) | [Enabled Visualforce Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled External Credential Principal Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Setting Definitions Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

Profile Detail	
Name	sales person
User License	Salesforce Platform
Description	
Created By	Sneha Sharma 27/07/2024, 10:43 pm
Modified By	Sneha Sharma 27/07/2024, 10:43 pm

Page Layouts	
Standard Object Layouts	Global: Global Layout [View Assignment] Email Application: Not Assigned [View Assignment] Home Page Layout: Home Page Default [View Assignment] Account: Account Layout [View Assignment] Alternative Payment Method: Alternative Payment Method Layout
Custom Object Layouts	Invoice Line: Invoice Line Layout [View Assignment] Lead: Lead Layout [View Assignment] Object Milestone: Object Milestone Layout [View Assignment] Operating Hours: Operating Hours Layout [View Assignment] Order: Order Layout

Lightning Record Pa... (4) कार्यसभा E A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case with... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

Search Setup

Profiles

Profile Edit

sales person

Set the permissions and page layouts for this profile.

Profile Edit	
Name	sales person
User License	Salesforce Platform
Description	
Custom Profile	<input checked="" type="checkbox"/>

Custom App Settings	
Analytics Studio (standard_Insights)	Visible: <input type="checkbox"/> Default: <input type="radio"/>
App Launcher (standard_AppLauncher)	Visible: <input type="checkbox"/> Default: <input type="radio"/>
Garage Management Application (Garage_Management_Application)	Visible: <input checked="" type="checkbox"/> Default: <input checked="" type="radio"/>
Platform (standard_Platform)	Visible: <input checked="" type="checkbox"/> Default: <input type="radio"/>
WDC (standard_Work)	Visible: <input type="checkbox"/> Default: <input type="radio"/>

Service Provider Access	
Tab Settings	

2. Select the profile type and customize permissions.
3. Click **Save**.

3.8.2 Creating Roles

Task: Define roles to establish hierarchy and access.

Process:

1. Go to **Setup > Roles > New Role**.

hawk3-dev-ed.develop.lightning.force.com/lightning/setup/Roles/home

Lightning Record Pa... (र) काटसप्त A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

roles

Users Roles

Feature Settings Sales Contact Roles on Contracts Contact Roles on Opportunities Service Case Teams Case Team Roles Contact Roles on Cases

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.

Your Organization's Role Hierarchy

Help for this Page Show in tree view

CEO SF Admin

Did you find what you're looking for? Try using Global Search.

hawk3-dev-ed.develop.lightning.force.com/lightning/setup/Roles/page?address=%2F00E%2Fe%3Fparent%3D00Ed000001HWqz%26setupid%3Droles%26retURL%3D%252Fu%252Fsetup%252F...

Lightning Record Pa... (र) काटसप्त A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

roles

Users Roles

Feature Settings Sales Contact Roles on Contracts Contact Roles on Opportunities Service Case Teams Case Team Roles Contact Roles on Cases

Role Edit New Role

Role Edit

Label Manager

Role Name Manager

This role reports to CEO

Role Name as displayed on reports

Save Save & New Cancel

Did you find what you're looking for? Try using Global Search.

hawk3-dev-ed.develop.lightning.force.com/lightning/setup/Roles/home

Lightning Record Pa... (र) काटसप्त A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

roles

Users Roles

Feature Settings Sales Contact Roles on Contracts Contact Roles on Opportunities Service Case Teams Case Team Roles Contact Roles on Cases

Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role Hierarchy

View other sample Role Hierarchies Territory-based Sample

Executive Staff

CEO President CFO VP, Sales

- * View & edit data, roll up forecasts, & generate reports for all users below
- * Can't access data of other Executive Staff

Western Sales Director

Western Sales Rep CA Sales Rep OR Sales Rep

Eastern Sales Director

Eastern Sales Rep NY Sales Rep MA Sales Rep

International Sales Director

International Sales Rep Asian Sales Rep European Sales Rep

- * View & edit data, roll up forecasts, & generate reports for all users directly beneath
- * Can't access data of users above or at same level

Western Sales Rep

CA Sales Rep OR Sales Rep

Eastern Sales Rep

NY Sales Rep MA Sales Rep

International Sales Rep

Asian Sales Rep European Sales Rep

- * View & edit data, roll up forecasts, & generate reports only for own data
- * Can't access data of users above or at same level

Set Up Roles

□ Don't show this page again

Did you find what you're looking for? Try using Global Search.

1

The top screenshot shows the 'Roles' page in the Salesforce Setup. The sidebar on the left is expanded, showing categories like 'Users' (with 'Roles' selected), 'Feature Settings', 'Sales', 'Service', and 'Case Teams'. The main area displays a hierarchical list of roles under 'Hawks', including CEO, CFO, COO, CTO, Manager, SVP.Customer Service & Support, Customer Support International, Customer Support North America, Installation & Repair Services, SVP.Human Resources, and SVP.R&D. Each role item has 'Edit | Del | Assign' buttons. A search bar at the top right says 'Search Setup'.

The bottom screenshot shows a 'Role Edit' dialog titled 'New Role'. It contains fields for 'Label' (set to 'sales person'), 'Role Name' (set to 'sales_person'), 'This role reports to' (set to 'Manager'), and 'Role Name as displayed on reports' (empty). At the bottom are 'Save', 'Save & New', and 'Cancel' buttons. The background shows the same Setup interface as the top screenshot.

2. Define the role name and hierarchy.
3. Click **Save**.

3.8.3 Creating Users

Task: Create users and assign roles and profiles.

Process:

1. Go to **Setup > Users > New User**.

hawk3-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home

Lightning Record Pa... (R) कार्यशाला A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwise... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

Search Setup

Users

All Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users | Edit | Create New View

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty.00d8000002nnruac.nwkvm9c54u5d@chatter.salesforce.com	Research Team	<input checked="" type="checkbox"/>	Chatter Free User
Edit Login	Concepcion Morales_Maria	mconc	m_c_morales.no.reply.xw5xxic40m.x8z7ekosycp.un9g8tqao@hawks393.com	Research Manager	<input checked="" type="checkbox"/>	Research Users
Edit Login	Figueroa_Jose	jfigu	jfigueroa.no.reply.9l9cx6ld1tp.92s3gqjowiv.sza0zg8ohnlk@hawks393.com	Research Manager	<input checked="" type="checkbox"/>	Research Manager
Edit	Olivera_Leonardo	loliv	lolivera.no.reply.us1ihvhwhex9.dpcv25hnm5yk.cfh3tqyrbmsu@hawks393.com	Research Team	<input type="checkbox"/>	Research Users
Edit	Sharma_Sneha	SShar	sneha.v2@hawks393.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
Edit	Thomasson_Sam	sithom	sam.thomasson.coe.csxgyoloyuy.refpybh0uxgu.tektmkwpc1c@hawks393.com	CTO	<input type="checkbox"/>	Standard Platform User
Edit	User_Inactive	inactive	a.ellington.coe.p9b07yineon.jlg5rchtviu.tck3inh91qu@hawks393.com		<input type="checkbox"/>	Force.com - Free User
Edit	User_Inactive	inactiv	user16567013228546579454.inxhm28bfu9.lbozmyf22rt.vvzoxh39dvc@hawks393.com		<input type="checkbox"/>	Force.com - Free User
Edit	User_Integration	integ	integration.00dd8000002nnruac.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
Edit	User_Security	ssec	insightssecurity@00d8000002nnruac.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

New User | Reset Password(s) | Add Multiple Users

hawk3-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FrId%3D00EdL000004wa41%26retURL%3D%252F00EdL000004wa41%253Fsetupid%253DRoles...

Lightning Record Pa... (R) कार्यशाला A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwise... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

Users

New User

User Edit

General Information

First Name	Niklaus	Role	Manager
Last Name	Mikaelson	User License	Salesforce Platform
Alias	nmiw8w89	Profile	Standard Platform User
Email	sneha272003@gmail.com	Active	<input checked="" type="checkbox"/>
Username	sneha8373578293@mika9	Marketing User	<input type="checkbox"/>
Nickname	User172219487460335797	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	-None--
		Data.com Monthly Addition Limit	Default Limit (300)

Required Information

hawk3-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005%2Fe%3FrId%3D%252F005%253FisUserEntityOverride%253D1%2526retURL%253D%25252Fsetup...

Lightning Record Pa... (R) कार्यशाला A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwise... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

Users

New User

User Edit

General Information

First Name	Martin	Role	sales person
Last Name	James	User License	Salesforce Platform
Alias	mjame090	Profile	sales person
Email	sneha272003@gmail.com	Active	<input checked="" type="checkbox"/>
Username	martinhnsjdj92973@martin9	Marketing User	<input type="checkbox"/>
Nickname	User17221957554434534	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	-None--
		Data.com Monthly Addition Limit	Default Limit (300)

Required Information

3

Enter user details and assign profiles and roles.

3. Click **Save**.

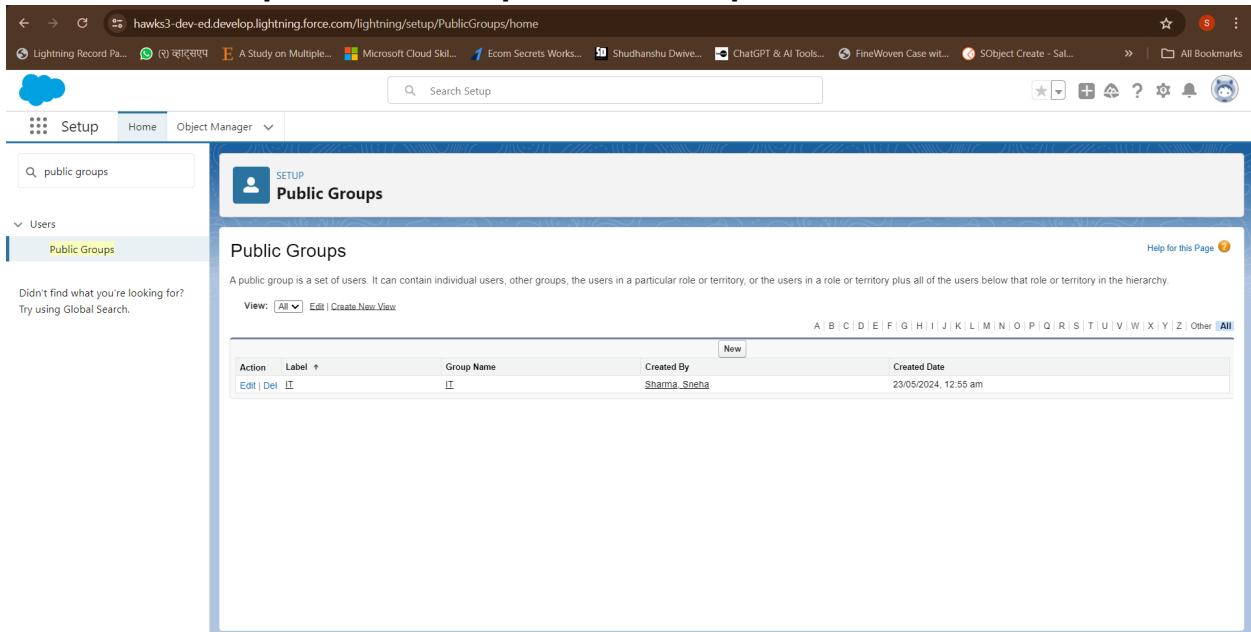
3.9 Public Groups and Sharing Settings

3.9.1 Creating Public Groups

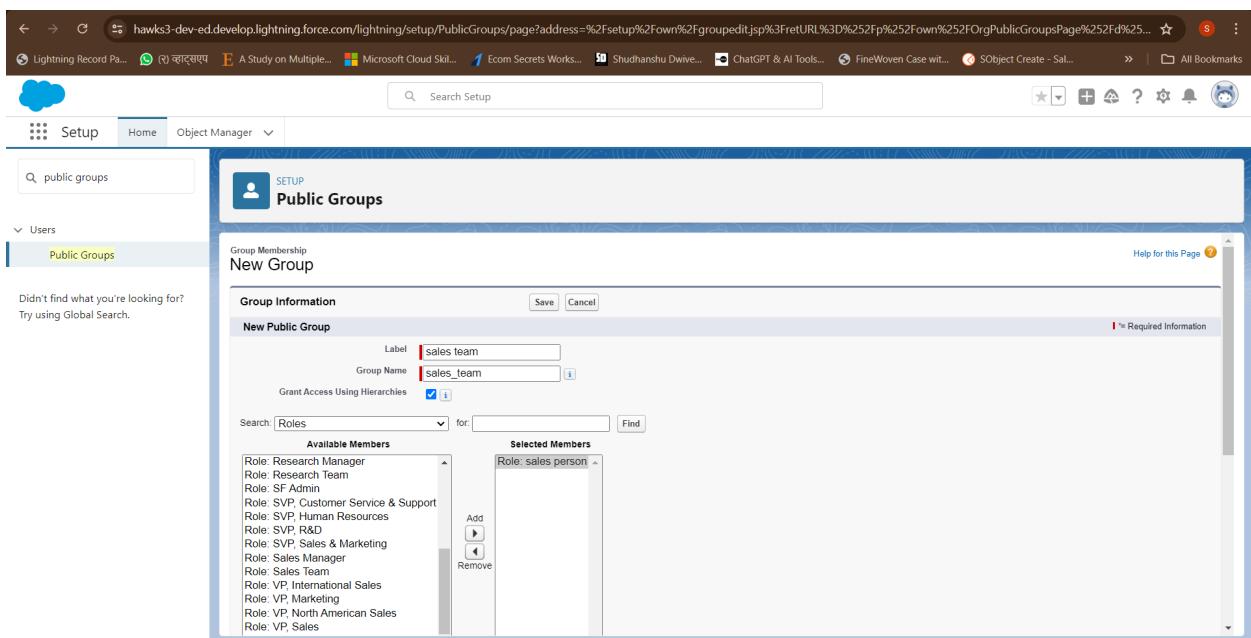
Task: Set up public groups for data sharing.

Process:

1. Go to **Setup > Public Groups > New Group**.



The screenshot shows the 'Public Groups' page in the Salesforce Setup. The URL is [/lightning/setup/PublicGroups/home](#). The page title is 'Public Groups'. A table lists one group: 'IT' (Label), 'sales_team' (Group Name), 'Sharma_Sneha' (Created By), and '23/05/2024, 12:55 am' (Created Date). There are 'Edit' and 'Delete' buttons for the group.



The screenshot shows the 'New Group' creation page. The URL is [/lightning/setup/PublicGroups/page?address=%2Fsetup%2Fown%2Fgroupedit.jsp%3FretURL%3D%252Fp%252Fown%252FOrgPublicGroupsPage%252Fd%25...](#) . The page title is 'Public Groups'. The 'Group Information' section includes fields for 'Label' (set to 'sales team') and 'Group Name' (set to 'sales_team'). A checkbox 'Grant Access Using Hierarchies' is checked. Below this, there are two lists: 'Available Members' (containing various roles like Research Manager, SF Admin, etc.) and 'Selected Members' (containing 'Role: sales person'). Buttons for 'Add' and 'Remove' are between the lists. A 'Save' and 'Cancel' button are at the top right.

2. Define the group name and members.

3. Click **Save**.

3.9.2 Setting Up Sharing Settings

Task: Configure sharing settings to control data access.

Process:

1. Navigate to **Setup > Sharing Settings**.

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. The left sidebar has 'Sharing Settings' selected under 'Security'. The main area displays 'Organization-Wide Defaults' for various objects like Lead, Account, Contact, etc. A table shows internal and external access levels and hierarchy grants. Buttons for 'Edit' and 'Organization-Wide Defaults Help' are visible.

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. The left sidebar has 'Sharing Settings' selected under 'Security'. The main area displays 'Tableau Host Mapping' and 'Other Settings' sections. Under 'Tableau Host Mapping', there's a grid of objects with dropdown menus for sharing rules. Under 'Other Settings', there are checkboxes for 'Standard Report Visibility', 'Manual User Record Sharing', 'Manager Groups', 'Secure guest user record access', and 'Require permission to view record names in lookup fields'. Buttons for 'Save' and 'Cancel' are at the bottom.

2. Set up organizational-wide defaults and sharing rules.

3. Click **Save**.

3.10 Flows and Apex

3.10.1 Creating Flows

Task: Automate processes using Salesforce Flows.

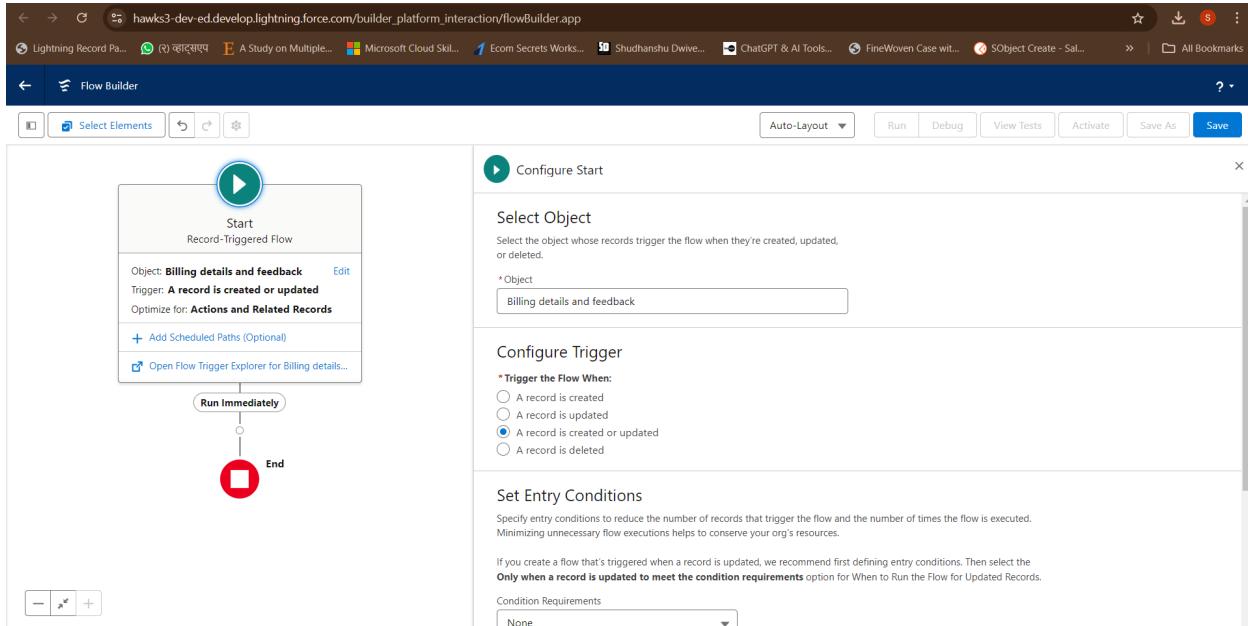
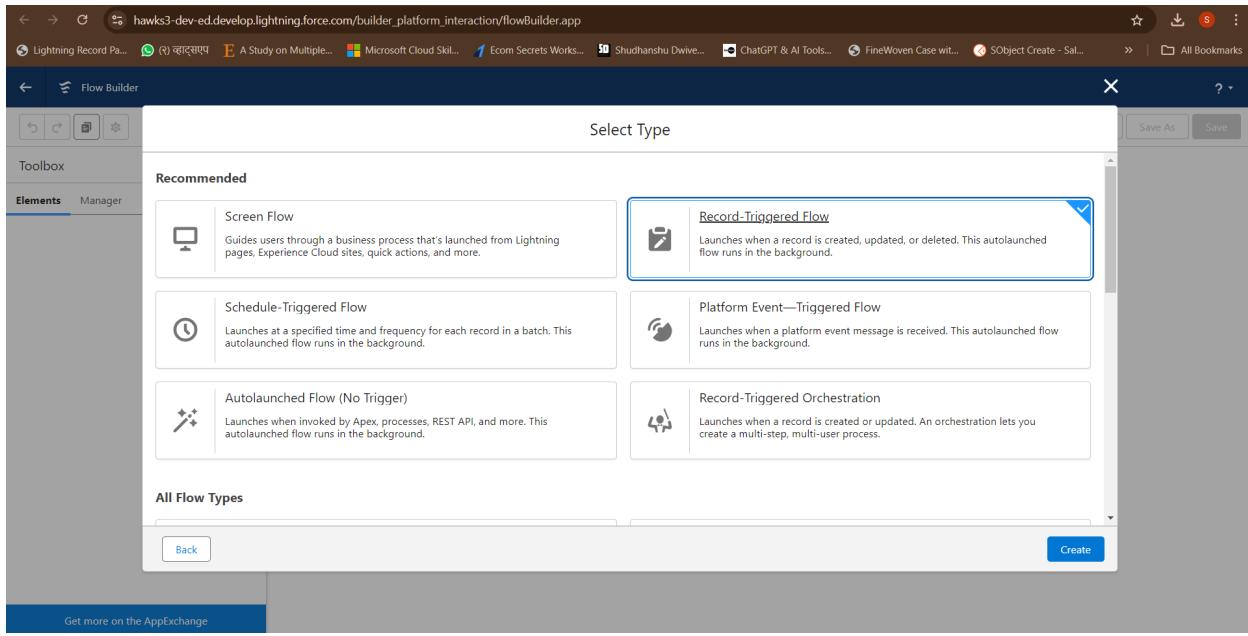
Process:

1. Go to **Setup > Flows > New Flow.**

The screenshot shows the Salesforce Setup interface with the 'Flows' tab selected. On the left, there's a sidebar with 'Process Automation' expanded, showing 'Flows' and 'Identity'. A search bar at the top has 'flows' typed into it. The main area displays a section titled 'Try the Automation Lightning App!' with a cartoon character illustration. Below this is a table titled 'Flow Definitions' with a 'All Flows' dropdown. The table lists several flows, each with a preview icon, name, process type, actions, triggers, package state, and last modified date. One flow, 'Add or Modify Service Appointment Attendees', is highlighted.

Flow Label	Process Type	Actions	Triggers	Package State	Owner	Last Modified Date
Add or Modify Service Appointment Attendees	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed		
Basic Approval Request	Flow Orchestration for CMS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed		
Billing Amount Flow	Flow Orchestration	<input type="checkbox"/>	<input type="checkbox"/>	Unmanaged	Sneha Sharma	29/07/2024, 1:32 am
Book Appointment from Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed		
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed		

The screenshot shows the 'Flow Builder' interface with the 'New Flow' screen open. At the top, there are two options: 'Start From Scratch' (selected) and 'Use a Template'. The 'Start From Scratch' option includes a sub-instruction: 'Select your automation type and start building on an empty canvas.' At the bottom of the screen are 'Back' and 'Next' buttons, with 'Next' being highlighted in blue. A small note at the bottom left says 'Get more on the AppExchange'.



Flow Builder

Start
Record-Triggered Flow

Object: Billing details and feedback Edit

Trigger: A record is created or updated

Optimize for: Actions and Related Records

+ Add Scheduled Paths (Optional)

Open Flow Trigger Explorer for Billing details...

Run Immediately

End

Configure Start

- A record is created
- A record is updated
- A record is created or updated
- A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

None

* Optimize the Flow for:

Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

Actions and Related Records

Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

Flow Builder

Record-Triggered Flow Start

Run Immediately

Add Element

Search...

Collection Sort

Collection Filter

Data

Create Records

Update Records

Get Records

Delete Records

End

Configure Start

- A record is created
- A record is updated
- A record is created or updated
- A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

None

* Optimize the Flow for:

Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

Actions and Related Records

Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

Flow Builder

Record-Triggered Flow

Update Records

- How to Find Records to Update and Set Their Values
 - Use the billing details and feedback record that triggered the flow (selected)
 - Update records related to the billing details and feedback record that triggered the flow
 - Use the IDs and all field values from a record or record collection
 - Specify conditions to identify records, and set fields individually
- Set Filter Conditions

Condition Requirements to Update Record: All Conditions Are Met (AND)

Field: Payment_Status__c	Operator: Equals	Value: Completed.
--------------------------	------------------	-------------------

+ Add Condition
- Set Field Values for the Billing details and feedback Record

Field: Payment_Paid__c	Value: \$Record > Service records > Appointment > S...
------------------------	--

+ Add Field

Flow Builder

Toolbox

Manager

Search this flow...

New Resource

ELEMENTS

Update Records (1)

Amount Update

Record-Triggered Flow

Run Immediately

Amount Update

End

Flow Builder

Billing Amount Flow - V1

Toolbox

Manager

Search this flow...

New Resource

ELEMENTS

Update Records (1)

Amount Update

New Resource

Resource Type: Text Template

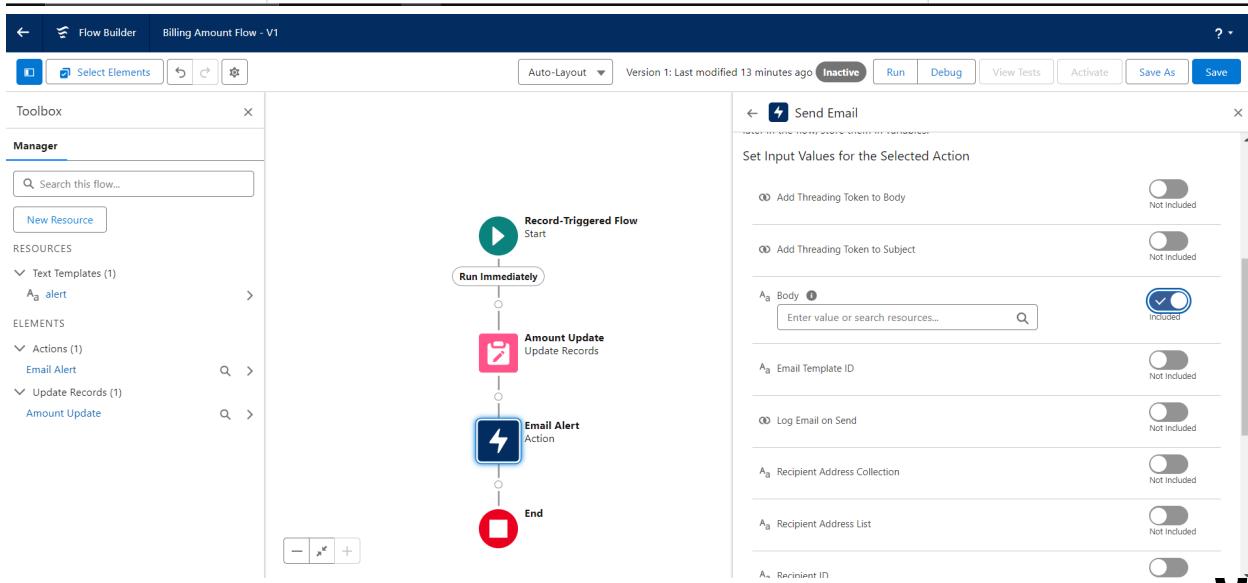
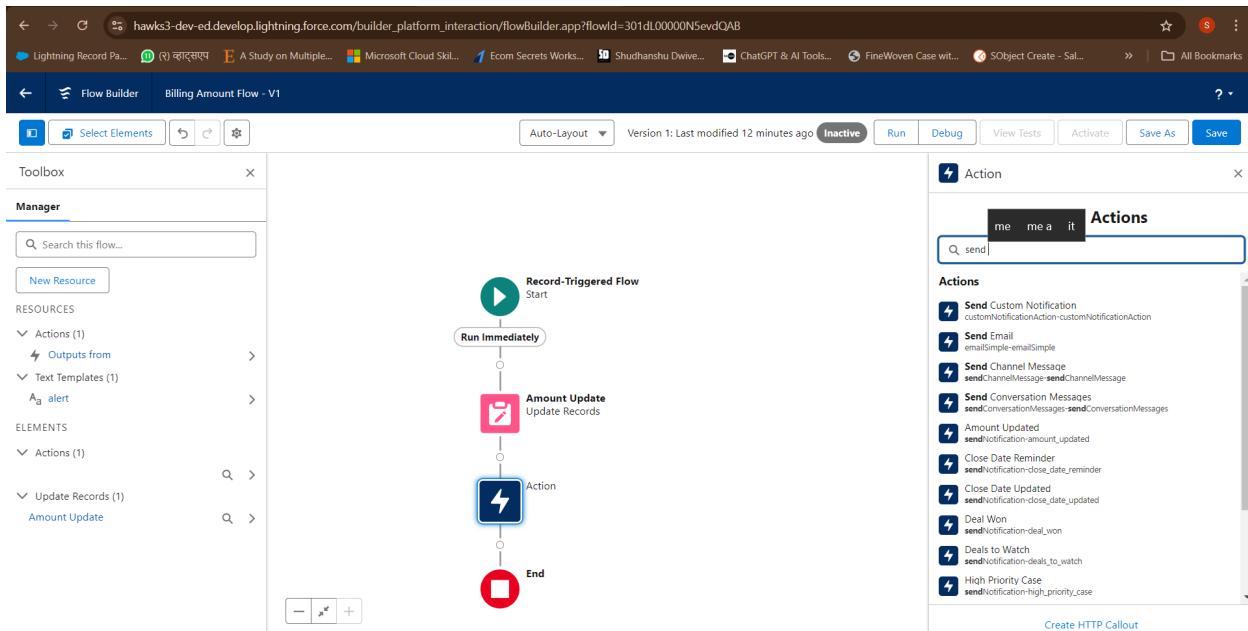
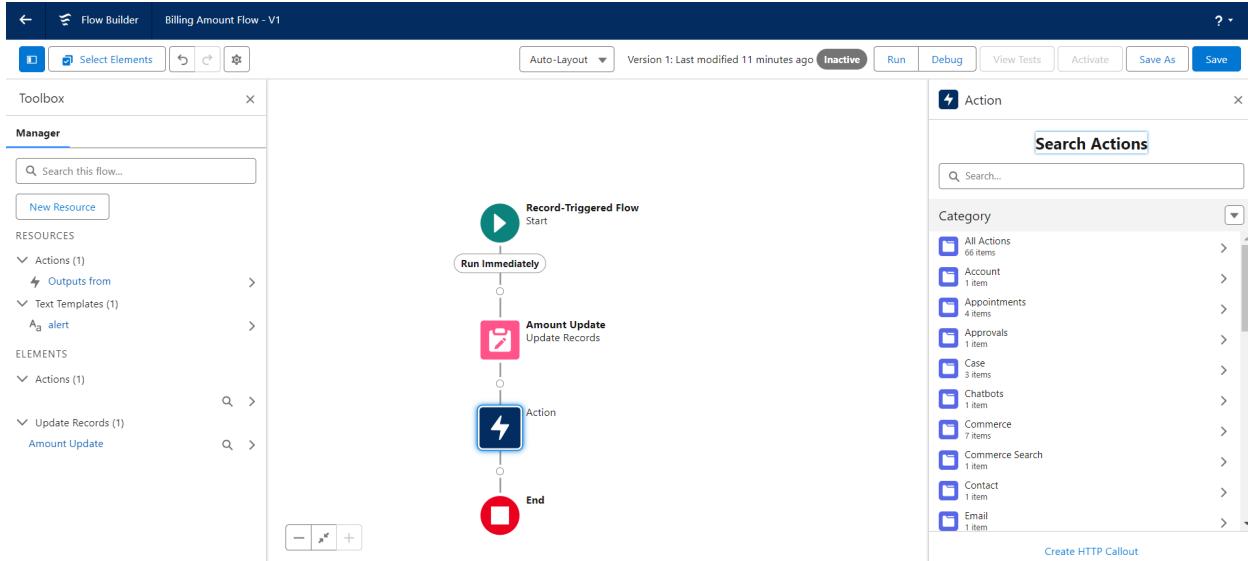
API Name: alert

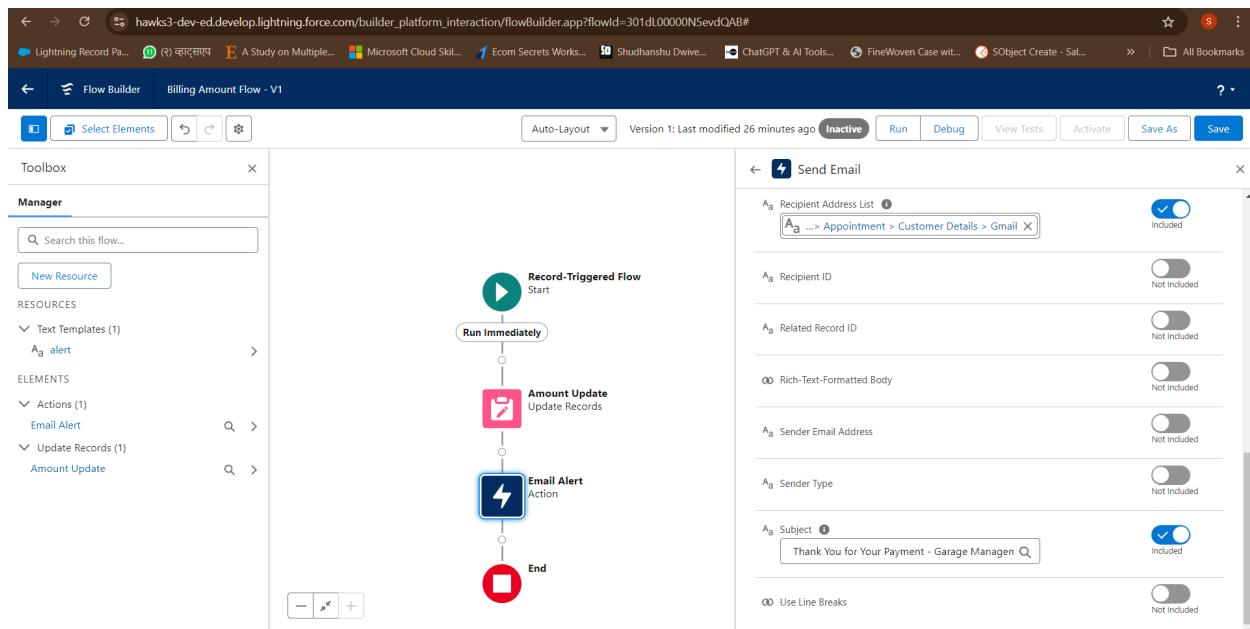
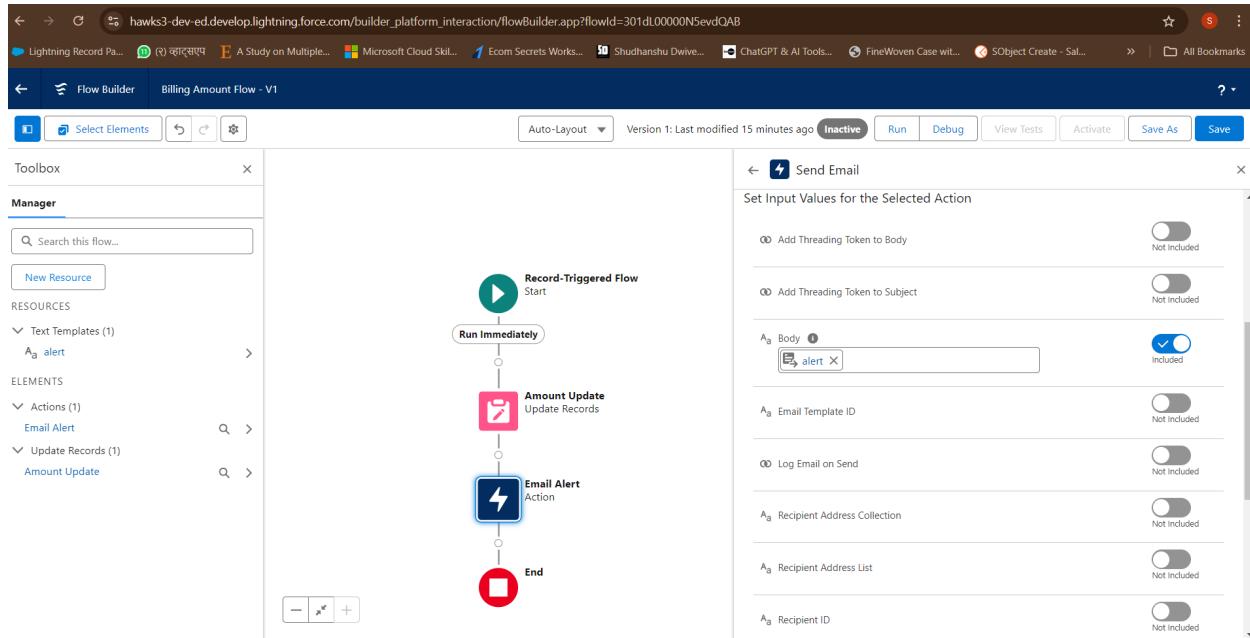
Description

Body

```
<p><span style="background-color: #fff; font-size: 14px; font-family: Montserrat, sans-serif; color: #000; padding: 0 10px; border-radius: 10px; border: 1px solid #000; display: inline-block; width: fit-content; margin-bottom: 10px;">Dear {!$Record.Service_records__r.Appointment__r.Customer__r.Name}</span></p><p><span class="ql-cursor"></span></p>
```

Cancel Done





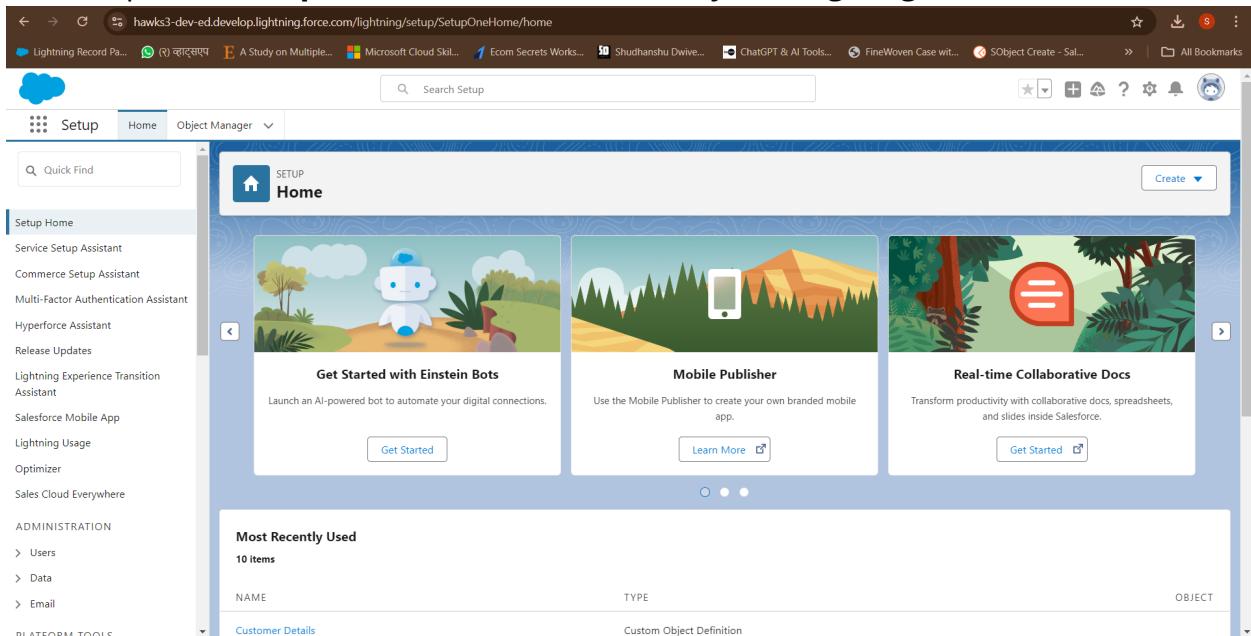
2. Create and configure flows for tasks like sending notifications or updating records.
3. Click **Save**.

3.10.2 Creating Apex Triggers and Handlers

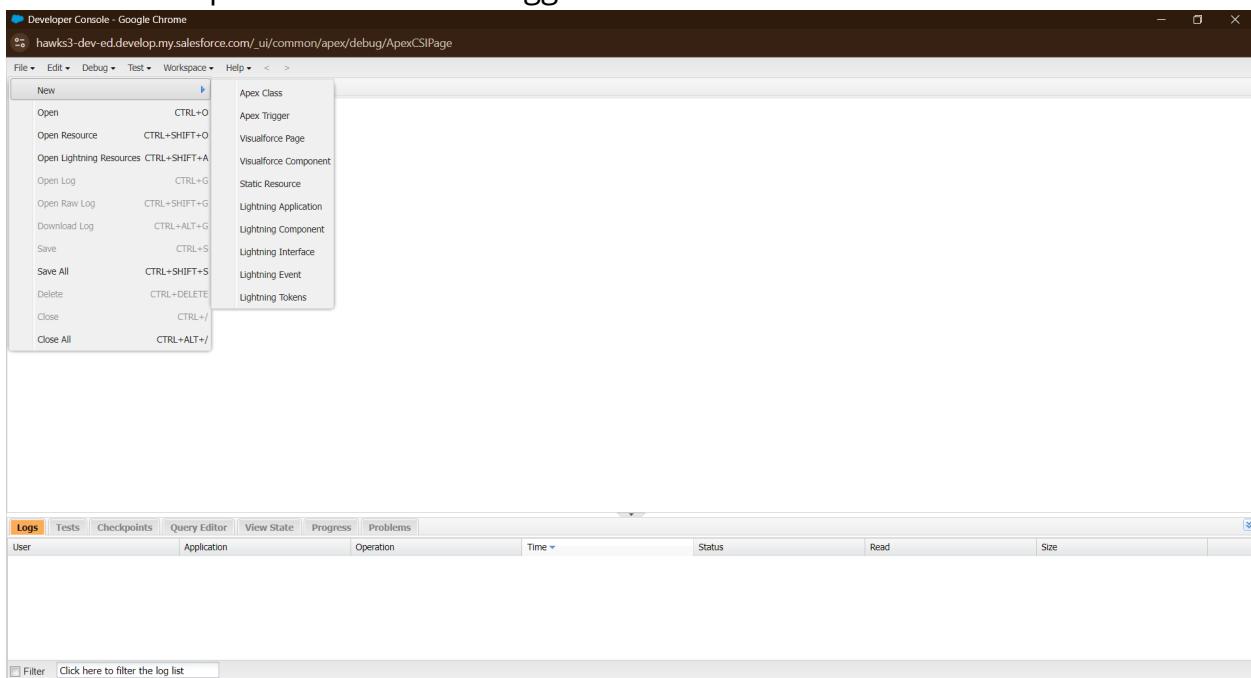
Task: Write Apex triggers for custom logic.

Process:

1. Open **Developer Console** in Salesforce by clicking on gear icon.



2. Write Apex code to create triggers and handlers.



Developer Console - Google Chrome
 hawk3-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < ▾ >

New Apex class

Please enter a name for your new Apex class
 AmountDistributionHandler

OK Cancel

Logs Tests Checkpoints Query Editor View State Progress Problems

User Application Operation Time Status Read Size

Filter Click here to filter the log list

Developer Console - Google Chrome
 hawk3-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < ▾ >

AmountDistributionHandler.apxc ▾

Code Coverage: None API Version: 61 Go To

```

1 public class AmountDistributionHandler {
2
3     public static void amountDist(list<Appointment__c> listApp){
4
5         list<Service_records__c> serList = new list <Service_records__c>();
6
7
8         for(Appointment__c app : listApp){
9             if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){
10                 app.Service_Amount__c = 10000;
11             }
12             else if(app.Maintenance_service__c == true && app.Repairs__c == true){
13                 app.Service_Amount__c = 5000;
14             }
15         }
16     }
17     else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
18         app.Service_Amount__c = 8000;
19     }
20     else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
21         app.Service_Amount__c = 7000;
22     }
23     else if(app.Maintenance_service__c == true){
24         app.Service_Amount__c = 2000;
25     }
26     else if(app.Repairs__c == true){
27         app.Service_Amount__c = 4000;
28     }
29 }
```

Logs Tests Checkpoints Query Editor View State Progress Problems

Name Line Problem

Developer Console - Google Chrome
 hawk3-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < ▾ >

AmountDistributionHandler.apxc ▾

Code Coverage: None API Version: 61 Go To

```

22     else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
23         app.Service_Amount__c = 8000;
24     }
25     else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
26         app.Service_Amount__c = 7000;
27     }
28     else if(app.Maintenance_service__c == true){
29         app.Service_Amount__c = 2000;
30     }
31     else if(app.Repairs__c == true){
32         app.Service_Amount__c = 4000;
33     }
34 }
```

Logs Tests Checkpoints Query Editor View State Progress Problems

Name Line Problem

o3

Developer Console - Google Chrome
 hawk3-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >

AmountDistributionHandler.apxc ▾

Code Coverage: None API Version: 61 Go To

```

38
39 }
40
41 else if(app.Repairs__c == true){
42
43     app.Service_Amount__c = 3000;
44
45 }
46
47 else if(app.Replacement_Parts__c == true){
48
49     app.Service_Amount__c = 5000;
50
51 }
52
53
54
55 }
56
57 }
```

Logs Tests Checkpoints Query Editor View State Progress Problems

Name Line Problem

Again return to home page and again click on gear icon and click on developer console.

hawk3-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home

Lightning Record Pa... (R) स्टॉडरेप E A Study on Multiple... Microsoft Cloud Skill... 1 Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sa... All Bookmarks

Cloud Setup Home Object Manager

Quick Find

Setup Home

- Service Setup Assistant
- Commerce Setup Assistant
- Multi-Factor Authentication Assistant
- Hyperforce Assistant
- Release Updates
- Lightning Experience Transition Assistant
- Salesforce Mobile App
- Lightning Usage
- Optimizer
- Sales Cloud Everywhere

ADMINISTRATION

- > Users
- > Data
- > Email

PLATFORM TOOLS

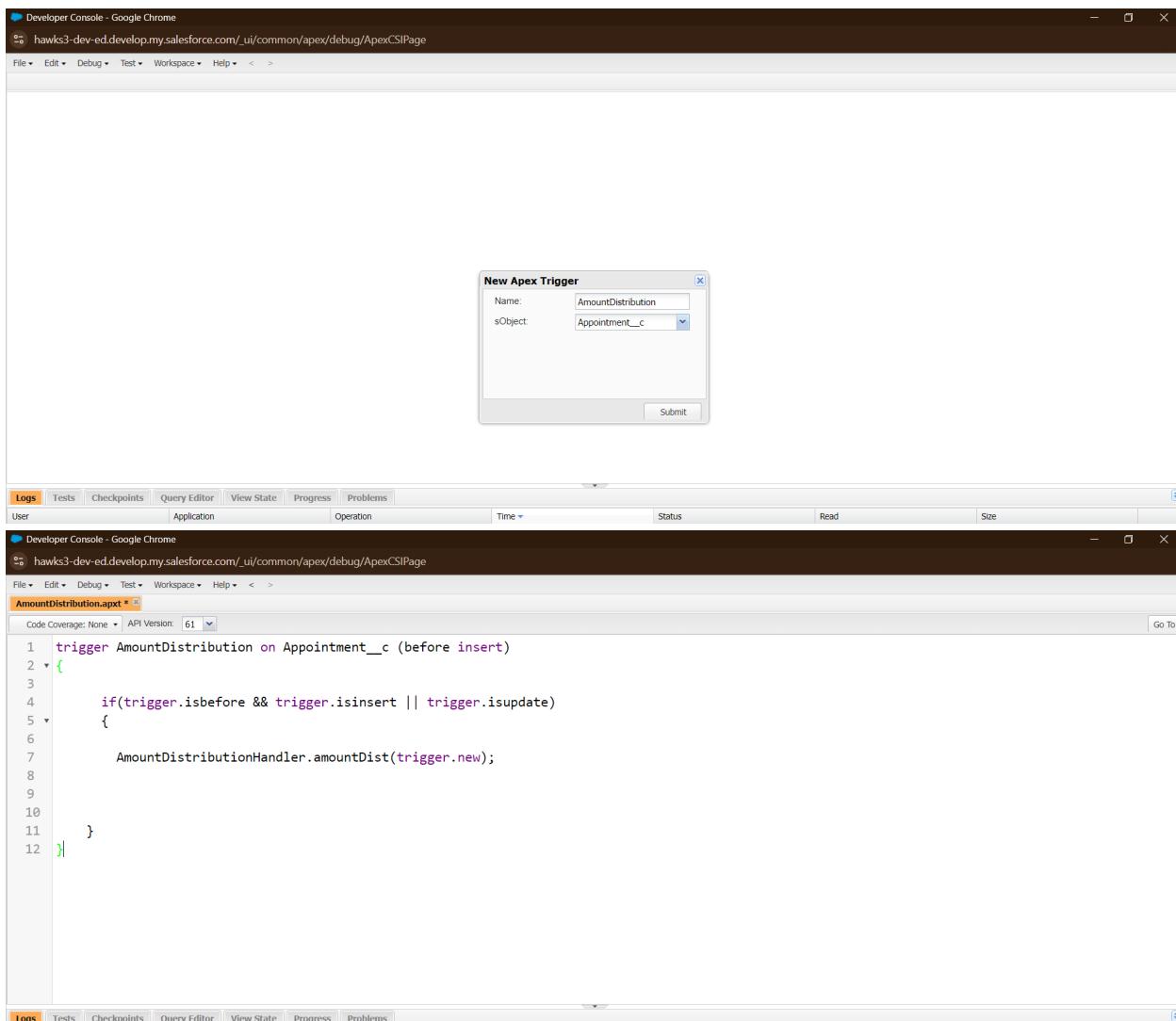
Developer Console - Google Chrome
 hawk3-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >

New Apex Trigger

Name:	<input type="text"/>
sObject:	<input type="button" value="▼"/>
Submit	

4



3. Save and deploy your code.

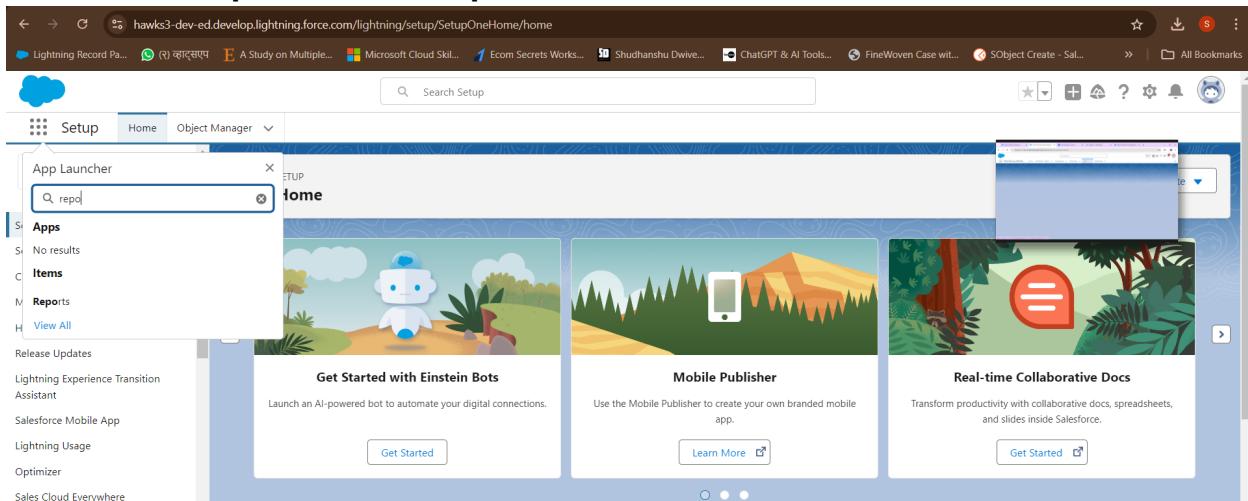
3.11 Reports and Dashboards

3.11.1 Creating Reports

Task: Generate reports for various metrics.

Process:

1. Go to **Reports > New Report.**



The screenshot shows the Salesforce Lightning interface for the Sales team. The top navigation bar includes links for Lightning Record Page, A Study on Multiple..., Microsoft Cloud Skill..., Ecom Secrets Works..., Shudhanshu Dwivedi..., ChatGPT & AI Tools..., FineWoven Case wit..., SObject Create - Sal..., and All Bookmarks. The main menu bar has items like Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, More, and a search bar. The Reports section is open, showing a table of recent reports. One report is listed: "Sample Flow Report: Screen Flows" created by "Automated Process" on "23/5/2024, 12:55 am". The sidebar on the left provides navigation for Reports, Folders, and Favorites.

This screenshot shows the same Salesforce interface as above, but with a modal window open over the Reports section. The modal is titled "Create folder" and contains fields for "Folder Label" (set to "Garage Management Folder") and "Folder Unique Name" (set to "GarageManagementFold"). There are "Cancel" and "Save" buttons at the bottom right of the modal. The background shows the same list of recent reports and the sidebar navigation.

hawk3-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=userFolders

Lightning Record Pa... (R) क्लाउड एप्प A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar More

All Folders

5 items

	Name	Created By	Created On	Last Modified By	Last Modified Date
REPORTS	Einstein Bot Reports	Automated Process	23/5/2024, 12:55 am	Automated Process	23/5/2024, 12:55 am
Recent	Einstein Bot Reports Summer '23	Automated Process	23/5/2024, 12:55 am	Automated Process	23/5/2024, 12:55 am
Created by Me	Einstein Bot Reports Summer '22	Automated Process	23/5/2024, 12:55 am	Automated Process	23/5/2024, 12:55 am
Private Reports	Einstein Bot Reports Winter '23	Automated Process	23/5/2024, 12:55 am	Automated Process	23/5/2024, 12:55 am
Public Reports	Garage Management Folder	Sneha Sharma	1/8/2024, 7:40 pm	Sneha Sharma	1/8/2024, 7:40 pm
All Reports					

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

hawk3-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=userFolders

Lightning Record Pa... (R) क्लाउड एप्प A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Sales Home Opportunities Leads Tasks

All Folders

5 items

REPORTS

Name Created By Created On Last Modified By Last Modified Date

Einstein Bot Reports Automated Process 23/5/2024, 12:55 am Automated Process 23/5/2024, 12:55 am

Einstein Bot Reports Summer '23 Automated Process 23/5/2024, 12:55 am Automated Process 23/5/2024, 12:55 am

Einstein Bot Reports Summer '22 Automated Process 23/5/2024, 12:55 am Automated Process 23/5/2024, 12:55 am

Einstein Bot Reports Winter '23 Automated Process 23/5/2024, 12:55 am Automated Process 23/5/2024, 12:55 am

Garage Management Folder Sneha Sharma 1/8/2024, 7:40 pm Sneha Sharma 1/8/2024, 7:40 pm

FOLDERS

All Folders

Share folder

These sharing settings apply to all subfolders in this folder.

Share With Roles

Names Manager Access View

Share

Who Can Access

Sneha Sharma Users Manage

Done

hawk3-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home

Lightning Record Pa... (R) क्लाउड एप्प A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup Home Object Manager

report

Feature Settings

Analytics

Reports & Dashboards

Access Policies

Historical Trending

Report Types

Reporting Snapshots

Reports and Dashboards

Settings

Security

Guest User Sharing Rule Access Report

Did you find what you're looking for?
Try using Global Search.

SETUP Home

Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.

Get Started

Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Learn More

Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

Get Started

Most Recently Used

10 items

NAME	TYPE	OBJECT
AppLog	Custom Object Definition	

hawk3-dev-ed.develop.lightning.force.com/lightning/setup/CustomReportTypes/page?address=%2F070

Action	Label	Description	Category	Deployed	Created By Alias	Created Date
Edit Del	Orchestration Run Logs_Spring_24	Find out which orchestration run logs were created and what happened in their associated orchestration runs.	Other Reports	<input checked="" type="checkbox"/>	autproc	23/05/2024
Edit Del	Orchestration Runs	Find out which orchestration runs were created.	Other Reports	<input checked="" type="checkbox"/>	autproc	23/05/2024
Edit Del	Orchestration Runs_Spring_24	Find out which orchestration runs were created.	Other Reports	<input checked="" type="checkbox"/>	autproc	23/05/2024
Edit Del	Orchestration Stage Runs_Spring_24	Find out which orchestration stage runs were created and the current status of each run.	Other Reports	<input checked="" type="checkbox"/>	autproc	23/05/2024
Edit Del	Orchestration Step Runs_Spring_24	Find out which orchestration step runs were created and the current status of each run.	Other Reports	<input checked="" type="checkbox"/>	autproc	23/05/2024
Edit Del	Orchestration Work Items_Spring_24	Find out which orchestration work items were created, who's the associated assignee, and what's the current status of each work item.	Other Reports	<input checked="" type="checkbox"/>	autproc	23/05/2024
Edit Del	Screen Flows	Find out which flows get executed and how long users take to complete each flow screen.	Other Reports	<input checked="" type="checkbox"/>	autproc	23/05/2024

hawk3-dev-ed.develop.lightning.force.com/lightning/setup/CustomReportTypes/page?address=%2F070

Report Type Focus

Specify what type of records (rows) will be the focus of reports generated by this report type.
Example: If reporting on "Contacts with Opportunities with Partners," select "Contacts" as the primary object.

Primary Object: Customer Details

Identification

Report Type Label: Service information
Report Type Name: Service_information
Description: Note: Description will be visible to users who create reports
Store in Category: Other Reports

Deployment

A report type with deployed status is available for use in the report wizard. While in development, report types are visible only to authorized administrators and their delegates.

Deployment Status: In Development
 Deployed

Next | Cancel

hawks3-dev-ed.develop.lightning.force.com/lightning/setup/CustomReportTypes/page?address=%2F_ui%2Fanalytics%2Fcr%2Fsetup%2FcrWizard%3Fr?url%3D%252F070%252FappLayout%25...

Lightning Record Pa... (र) कार्यपालिका A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudharshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Setup

Home Object Manager

Quick Find

Setup Home Service Setup Assistant Commerce Setup Assistant Multi-Factor Authentication Assistant Hyperforce Assistant Release Updates Lightning Experience Transition Assistant Salesforce Mobile App Lightning Usage Optimizer Sales Cloud Everywhere ADMINISTRATION > Users > Data > Email

Report Types

Step 2. Define Report Records Set Step 2 of 2

This report type will generate reports about Customer Details. You may define which related records from other objects are returned in report results by choosing a relationship to another object.

A Customer Details Primary Object

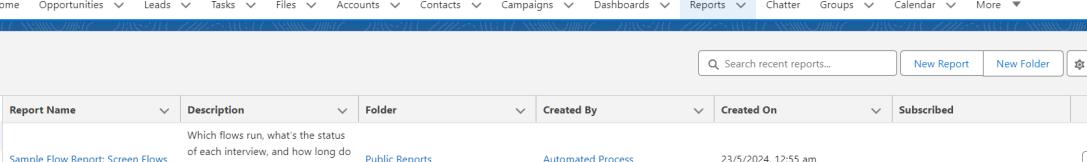
B Appointments
A to B Relationship:
 Each "A" record must have at least one related "B" record.
 "A" records may or may not have related "B" records.

C Service records
B to C Relationship:
 Each "B" record must have at least one related "C" record.
 "B" records may or may not have related "C" records.

D Billing details and feedback
C to D Relationship:
 Each "C" record must have at least one related "D" record.
 "C" records may or may not have related "D" records.



Previous Save Cancel



The screenshot shows the Salesforce Reports page. The top navigation bar includes icons for Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports (selected), Chatter, Groups, Calendar, More, and a search bar. On the left, a sidebar lists 'Recent' reports (1 item), 'Created by Me' (Public Reports, Sample Flow Report: Screen Flows), 'Private Reports', 'Public Reports', 'All Reports', 'Folders' (All Folders), 'Created by Me', 'Shared with Me', and 'Favorites' (All Favorites). The main content area displays a table with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. One report is listed: 'Sample Flow Report: Screen Flows' (Description: Which flows run, what's the status of each interview, and how long do users take to complete the screens?), located in 'Public Reports' folder, created by 'Automated Process' on '23/5/2024, 12:55 am'. A 'New Report' and 'New Folder' button are at the top right.

Report Name	Description	Folder	Created By	Created On	Subscribed
Sample Flow Report: Screen Flows	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Public Reports	Automated Process	23/5/2024, 12:55 am	

The screenshot shows the Salesforce Lightning interface with a dark theme. At the top, there's a navigation bar with various links like 'To Do List', 'Lightning Record Pa...', 'A Study on Multiple...', 'Microsoft Cloud Skill...', 'Ecom Secrets Works...', 'Shudhanshu Dwive...', 'ChatGPT & AI Tools...', 'FineWoven Case wit...', 'SObject Create - Sal...', and 'All Bookmarks'. Below the navigation is a main menu with items like Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, and More. A search bar is also present. The central area features a modal titled 'Create Report' with a sidebar on the left containing a 'Category' section with links for Recently Used, All (which is selected), Accounts & Contacts, Opportunities, Customer Support Reports, Leads, Campaigns, Activities, and Contracts and Orders. The main content area has a heading 'Select a Report Type' with a search bar containing 'serv'. Below it, a message says 'Showing results for serv'. A table lists report types with columns for 'Report Type Name' and 'Category'. The table includes rows for 'Service records' (Standard), 'Service records with Appointment Date' (Standard), 'Service records with Appointment' (Standard), 'Service records History' (Standard), 'Billing details and feedback with Service records' (Standard), and 'Service information' (Custom). Each row has a dropdown arrow icon.

Report Type Name	Category
Service records	Standard
Service records with Appointment Date	Standard
Service records with Appointment	Standard
Service records History	Standard
Billing details and feedback with Service records	Standard
Service information	Custom

Lightning Record Pa... (र) कार्यशाला A Study on Multiple... Microsoft Cloud Skil... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

REPORT ▾

New Service information Report

Service information

Fields > Outline Filters 2

Groups

GROUP ROWS Add group...

Columns

Add column...

Customer Name X

Appointment Date X

Service Status X

Payment Paid X

Previewing a limited number of records. Run the report to see everything.

Customer Name Appointment Date Service Status Payment Paid

No records returned in preview. Try running the report or editing report filters.

- Show All customer details.
- Set the Created Date filter to All Time.
- Edit other filters in the filter panel.

Update Preview Automatically

Add Chart Save & Run Save Close Run

To Do List



Lightning Record Pa... (र) कार्यशाला A Study on Multiple... Microsoft Cloud Skil... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

REPORT ▾

New Service information Report

Service information

Fields > Outline Filters

Groups

GROUP ROWS Add group...

Rating for service

GROUP COLUMNS Add group...

Payment Status X

Columns

Add column...

Customer Name X

Appointment Date X

Service Status X

Payment Paid X

Rating for service Payment Status Total

Previewing a limited number of records. Run the report to see everything.

No records returned in preview. Try running the report or editing report filters.

Details (0 Rows) Click an intersection in the table above to filter details.

Customer Name Appointment Date Service Status Payment Paid

Row Counts Detail Rows Grand Total Stacked Summaries

Update Preview Automatically

Save & Run Save Close Run

To Do List



Lightning Record Pa... (र) कार्यशाला A Study on Multiple... Microsoft Cloud Skil... Ecom Secrets Works... Shudhanshu Dwive... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

REPORT ▾

New Service information Report

Service information

Fields > Outline Filters

Groups

GROUP ROWS Add group...

Rating for service

GROUP COLUMNS Add group...

Payment Status X

Columns

Add column...

Customer Name X

Appointment Date X

Service Status X

Payment Paid X

Report Unique Name New_Service_information_Report_JR3

Report Description

Folder Garage Management Folder Select Folder

Save Report

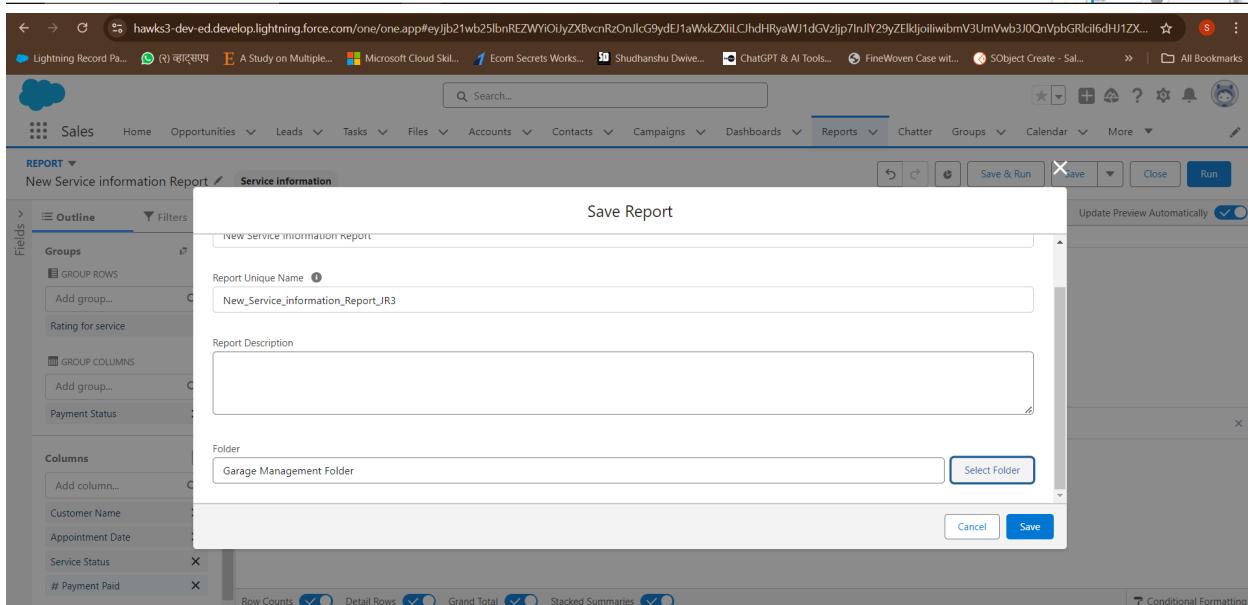
Save & Run Save Close Run

Update Preview Automatically

Cancel Save

Conditional Formatting

To Do List



The screenshot shows a Salesforce report titled "Service information". The report interface includes a sidebar with "Fields" and "Columns" sections, and a main area with a table and a chart.

Table Data:

Rating of Service	Payment Status	Pending	Paid	Overdue	Total
1	Sum of Payment Paid Record Count	0	0	0	0
2	Sum of Payment Paid Record Count	1	0	0	1
3	Sum of Payment Paid Record Count	1	1	0	2
4	Sum of Payment Paid Record Count	0	0	1	1
5	Sum of Payment Paid Record Count	1	2	0	3

Chart Data:

A line chart titled "Sum of Payment Paid" showing the trend over "Rating of Service" from 1 to 5. The Y-axis ranges from 0 to 4.

Rating of Service	Sum of Payment Paid
1	0
2	1
3	2
4	1
5	3

The screenshot shows a Salesforce report titled "dash". The report interface includes a sidebar with "Apps", "Items", and "Dashboards" sections, and a main area with a table and a chart.

Table Data:

	Paid	Overdue	Total
No results	0	0	1
Items	1	0	2
1	1	0	3
Dashboards	0	1	1
2	0	1	2
View All	2	0	3
Record Count	2	0	3
Total	Sum of Payment Paid Record Count	3	3
	Record Count	5	10

Chart Data:

A line chart showing the trend over "Record Count" from 1 to 10. The Y-axis ranges from 0 to 10.

Record Count	Sum of Payment Paid
1	0
2	1
3	2
4	3
5	3
6	4
7	5
8	6
9	7
10	8

2. Choose the report type and configure filters, grouping, and columns.
3. Click **Save**.

3.11.2 Creating Dashboards

Task: Create dashboards to visualize key metrics.

Process:

1. Go to **Dashboards > New Dashboard**.

hawk3-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru

Lightning Record Pa... (R) क्लाउडशेप A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwivedi... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar More

Dashboards Recent 0 items

DASHBOARDS

- Recent
- Created by Me
- Private Dashboards
- All Dashboards

FOLDERS

- All Folders
- Created by Me
- Shared with Me

FAVORITES

- All Favorites

Search... Search recent dashboards... New Dashboard New Folder

Recent dashboards appear here
Go to All Dashboards to see what's available.
[View All Dashboards](#)

To Do List

hawk3-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=userFolders

Lightning Record Pa... (R) क्लाउडशेप A Study on Multiple... Microsoft Cloud Skill... Ecom Secrets Works... Shudhanshu Dwivedi... ChatGPT & AI Tools... FineWoven Case wit... SObject Create - Sal... All Bookmarks

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar More

Dashboards All Folders 1 item

DASHBOARDS

Name	Created By	Created On	Last Modified By	Last Modified Date
Service Rating dashboard	Sneha Sharma	1/8/2024, 9:16 pm	Sneha Sharma	1/8/2024, 9:16 pm

FOLDERS

- All Folders
- Created by Me
- Shared with Me

FAVORITES

- All Favorites

Search... Search all folders... New Dashboard New Folder

To Do List

hawk3-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=userFolders

Name	Created By	Created On	Last Modified By	Last Modified Date
Service Rating dashboard	Sneha Sharma	1/8/2024, 9:16 pm	Sneha Sharma	1/8/2024, 9:16 pm

Dashboards
All Folders
1 item

DASHBOARDS

- Recent
- Created by Me
- Private Dashboards
- All Dashboards

FOLDERS

- All Folders
- Created by Me
- Shared with Me

FAVORITES

- All Favorites

hawk3-dev-ed.develop.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOlkzXNrdG9wRGfzaGlYXJkcwpkXNoYm9hcmQiLCJhdHRyaWJ1dGVzJp7ImRpC3BsXINb2RljoiZWRpdC9LClzdGF0Z...
Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar More

New Dashboard

* Name
Customer Review

Description

Folder
Service Rating dashboard

The screenshot shows a Salesforce Lightning interface. At the top, there's a navigation bar with links like 'Lightning Record Pa...', '(र) वादेशप', 'A Study on Multiple...', 'Microsoft Cloud Skill...', 'Ecom Secrets Works...', 'Shudhanshu Dwive...', 'ChatGPT & AI Tools...', 'FineWoven Case wit...', 'SObject Create - Sal...', 'All Bookmarks', and a search bar. Below the navigation is a header with a cloud icon, 'Sales' (highlighted), and other menu items: Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, Chatter, Groups, Calendar, More. A sub-header 'Customer Review' is visible above a large, empty grid table. The grid has several columns and rows, with a toolbar at the top right containing buttons for '+ Widget', '+ Filter', 'Save', and 'Done'.

This screenshot shows a 'Select Report' dialog box overlaid on a Salesforce page. The dialog has a title 'Select Report'. On the left, there's a sidebar with sections for 'Reports' (Recent, Created by Me, Private Reports, Public Reports, All Reports), 'Folders' (Created by Me), and a 'Select Report' search bar with a 'Search Reports and Folders...' input field and a 'Reports and Folders' dropdown. In the main area, a list shows 'New Service information Report' created by 'Sneha Sharma' on '01-Aug-2024, 9:14 pm' under a 'Garage Management Folder'. At the bottom right of the dialog are 'Cancel' and 'Select' buttons.

To Do List

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar More

Customer Review

Add Widget

Report: New Service information Report

Display As: Line Chart

X-Axis: Rating of Service

Y-Axis: Sum of Payment Paid

Legend: Pending (Blue), Paid (Purple), Overdue (Green)

Preview: New Service information Report

Sum of Payment Paid vs Rating of Service

Rating of Service	Pending	Paid	Overdue
1	0.0	0.0	0.0
2	0.0	1.0	0.0
3	0.0	1.0	0.0
4	1.0	0.0	0.0
5	0.0	2.0	1.0

View Report (New Service information Report)

Cancel Add

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar More

Customer Review

Add Widget

Report: New Service information Report

Subtitle:

Footer:

Legend Position: Right

Widget Theme: Dark

Preview: New Service information Report

Sum of Payment Paid vs Rating of Service

Rating of Service	Pending	Paid	Overdue
1	0.0	0.0	0.0
2	0.0	1.0	0.0
3	0.0	1.0	0.0
4	1.0	0.0	0.0
5	0.0	2.0	1.0

View Report (New Service information Report)

Cancel Add

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar More

Dashboard Customer Review

As of 01-Aug-2024, 9:26 pm Viewing as Sneha Sharma

Refresh Edit Subscribe

New Service information Report

Sum of Payment Paid vs Rating of Service

Rating of Service	Pending	Paid	Overdue
1	0.0	0.0	0.0
2	0.0	1.0	0.0
3	0.0	1.0	0.0
4	1.0	0.0	0.0
5	0.0	2.0	1.0

View Report (New Service information Report)

To Do List

5

The screenshot shows a Salesforce Lightning dashboard titled "Customer Review". The dashboard contains a chart titled "New Service information Report" showing the "Sum of Payment Paid" versus "Rating of Service". The chart has two data series: a blue line with diamond markers and a purple line with square markers. The data points are approximately as follows:

Rating of Service	Blue Line (Sum of Payment Paid)	Purple Line (Sum of Payment Paid)
1	0.0	0.0
2	1.0	1.0
3	0.0	1.0
4	0.0	1.0
5	1.0	2.0

Below the chart is a link to "View Report (New Service information Report)". The top navigation bar shows tabs like Sales, Home, Opportunities, and Leads. A search bar is at the top center. The main title "Edit Subscription" is displayed above the configuration dialog.

Edit Subscription

Schedule dashboard refreshes and subscribe to receive results.

Settings

Frequency: Weekly Daily Monthly

Days: Sun Mon Tue Wed Thu Fri Sat

Time: 9:00 pm

Recipients: Receive new results by email when dashboard is refreshed. ?

Send email to: Me

2. Add components like charts and tables to display data.
3. Click **Save**.

Conclusion

4.1 Summary of the Project

The Garage Management System has been effectively implemented in Salesforce, covering everything from object creation to advanced reporting. This system automates garage operations, manages customer data, and provides valuable insights through customized reports and dashboards.

4.2 Challenges Faced

- **Complex Relationships:** Managing relationships between different objects was challenging.
- **Data Integrity:** Ensuring data accuracy through validation and duplicate rules.
- **Balancing Automation:** Integrating automation with manual processes to maintain flexibility.

4.3 Future Enhancements

- **Mobile Access:** Implement mobile access for field staff.
- **External Integrations:** Integrate with external systems for better inventory management.
- **AI Enhancements:** Use AI for predictive maintenance and service recommendations.

Thank You