Garage Management System Documentation

TITLE

Garage Management System

By

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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.

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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.

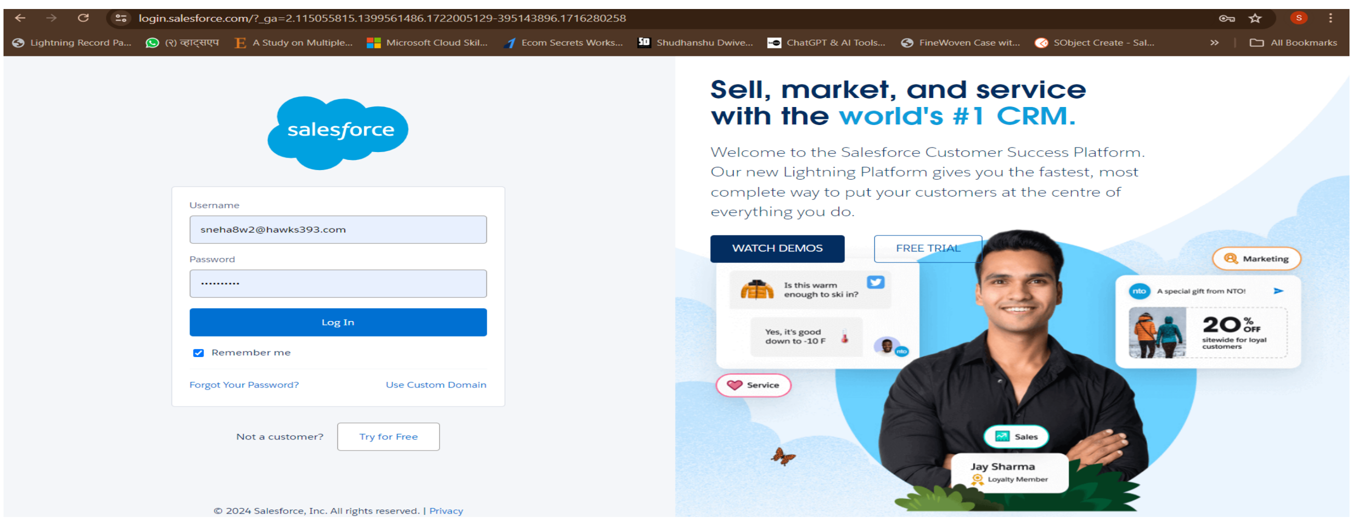
TASKS AND SCREENSHOTS OF THE PROCESS

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

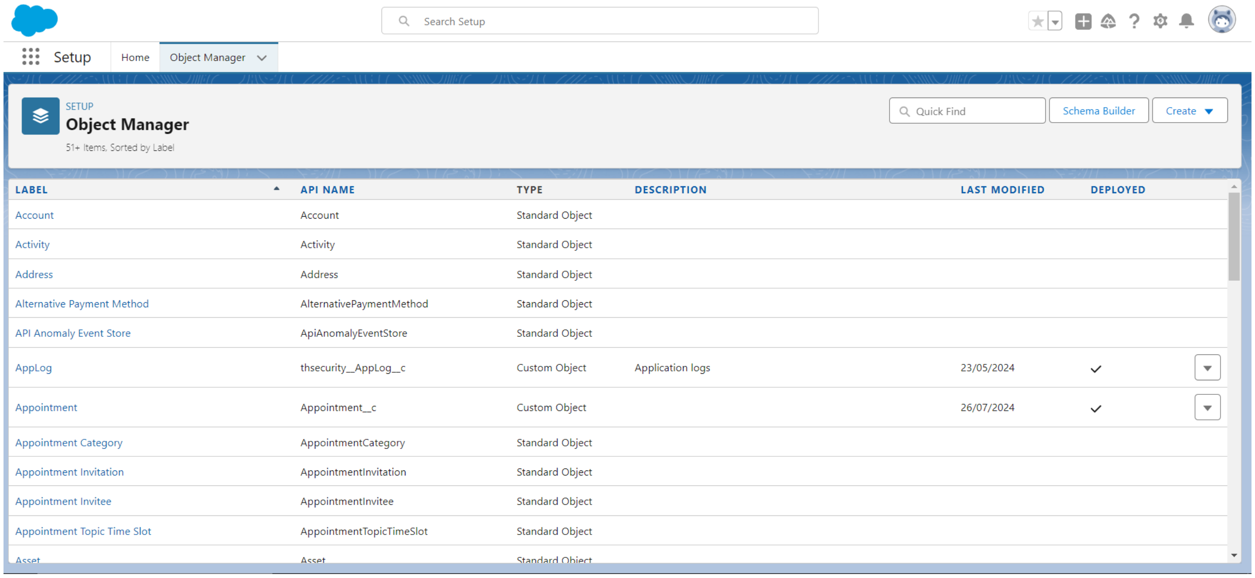
3.2.1 Customer Details Object

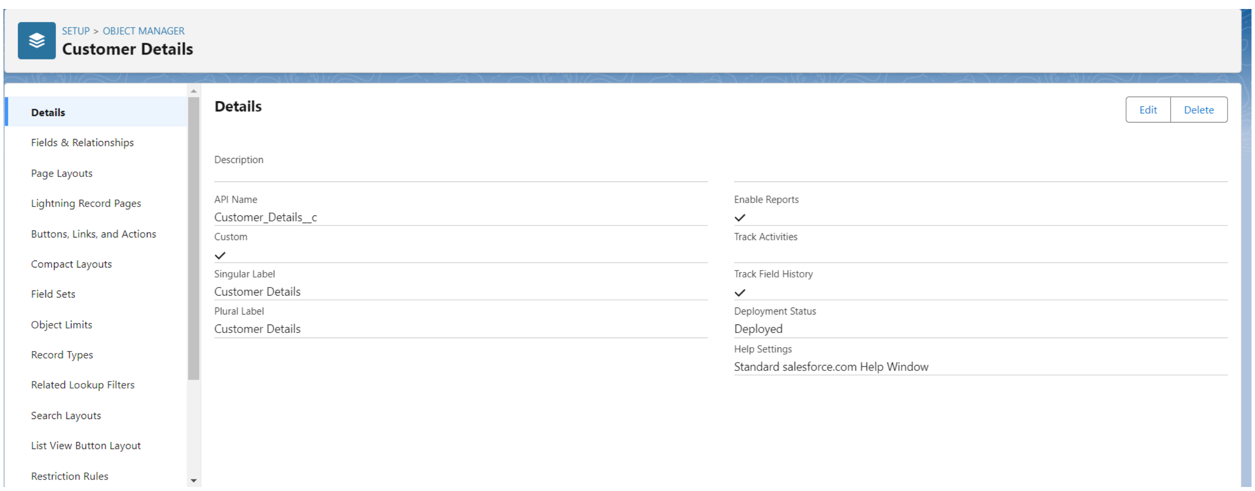
Task: Create an object to store customer information.

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**.

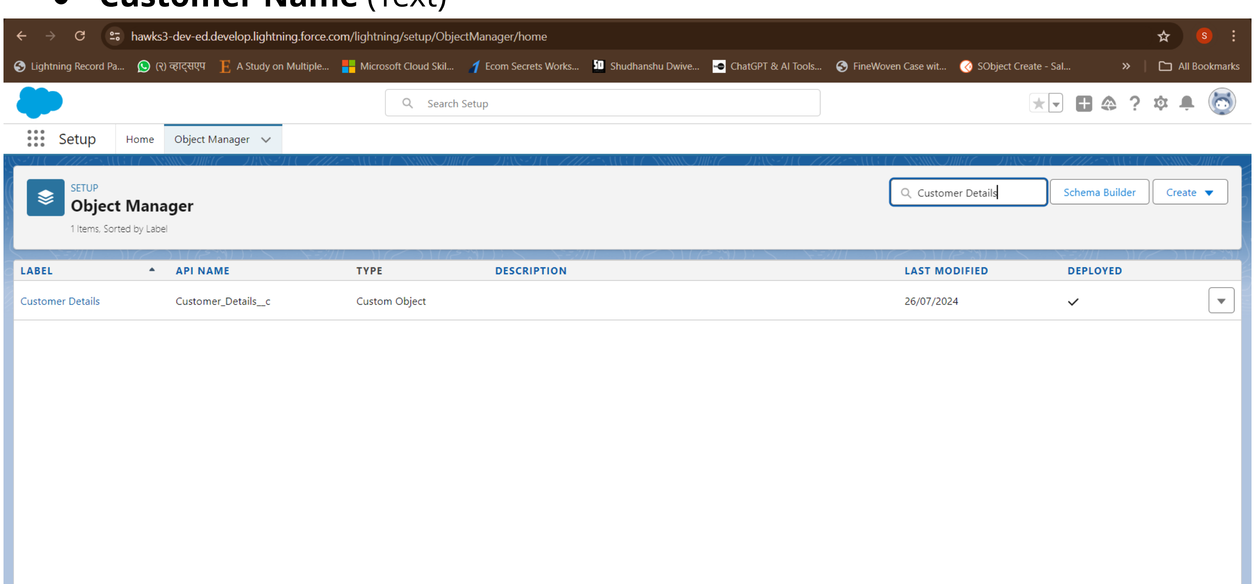
4. Enter **Customer Details** as the label and **Customer_ID** as the record name.
5. Select **Auto-Number** for the record name format and click **Save**.

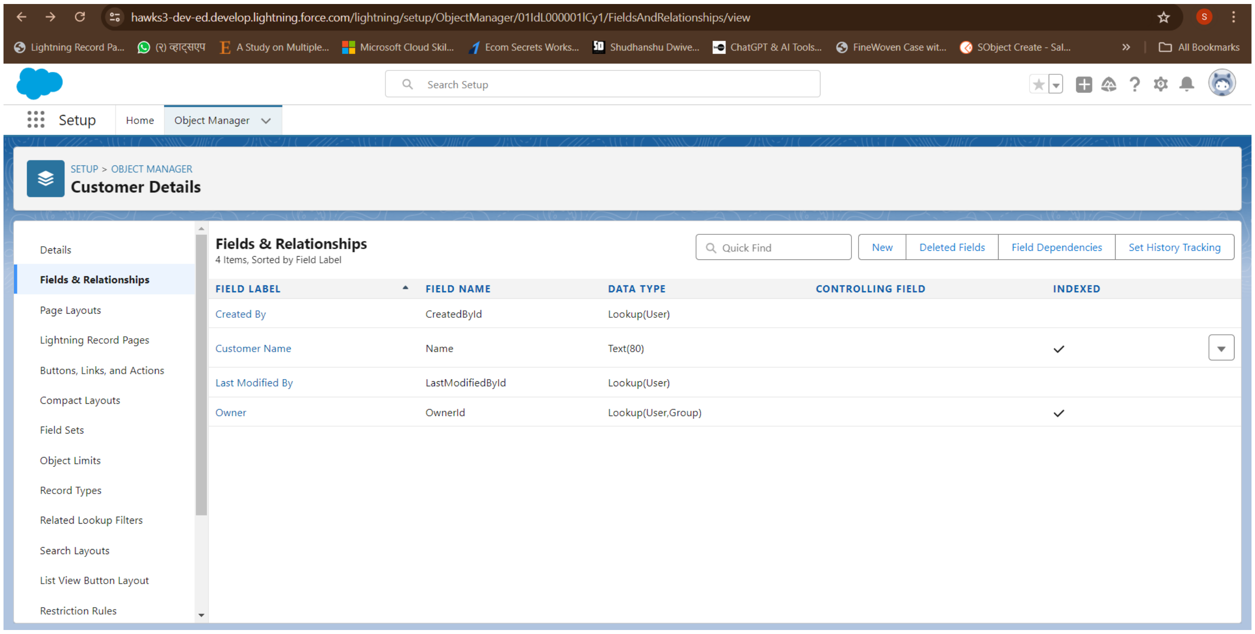




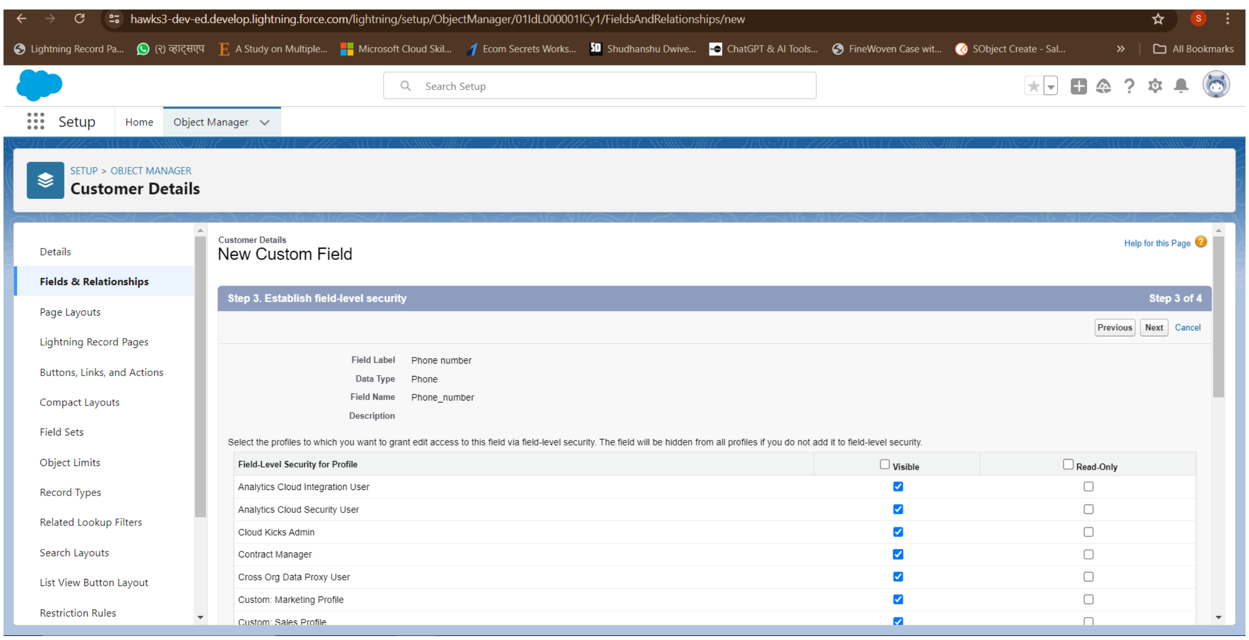
Fields Created:

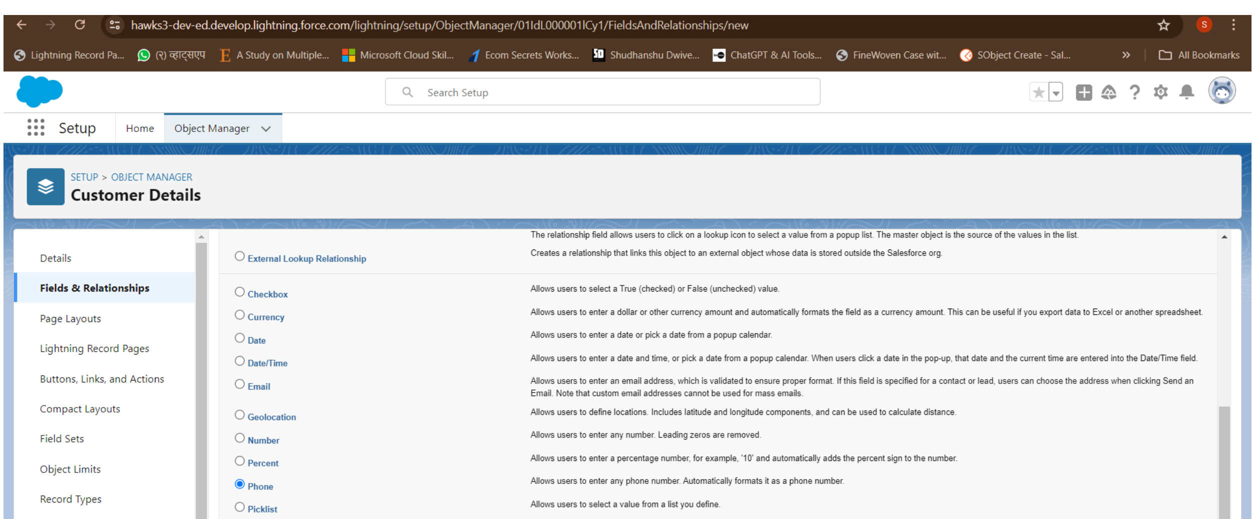
- **Customer Name** (Text)

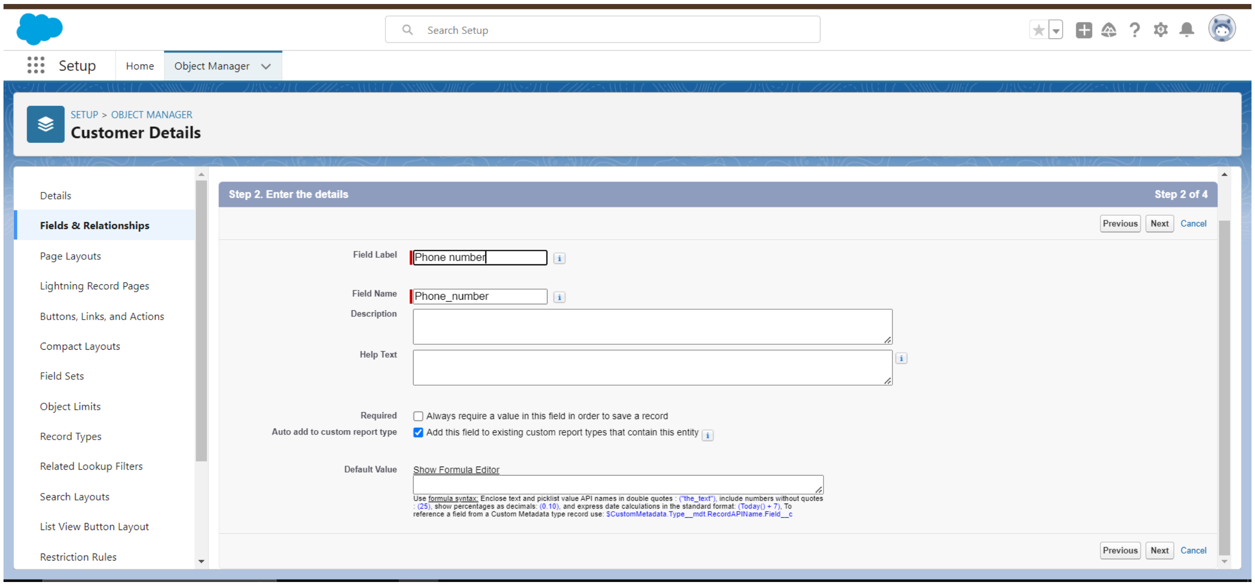


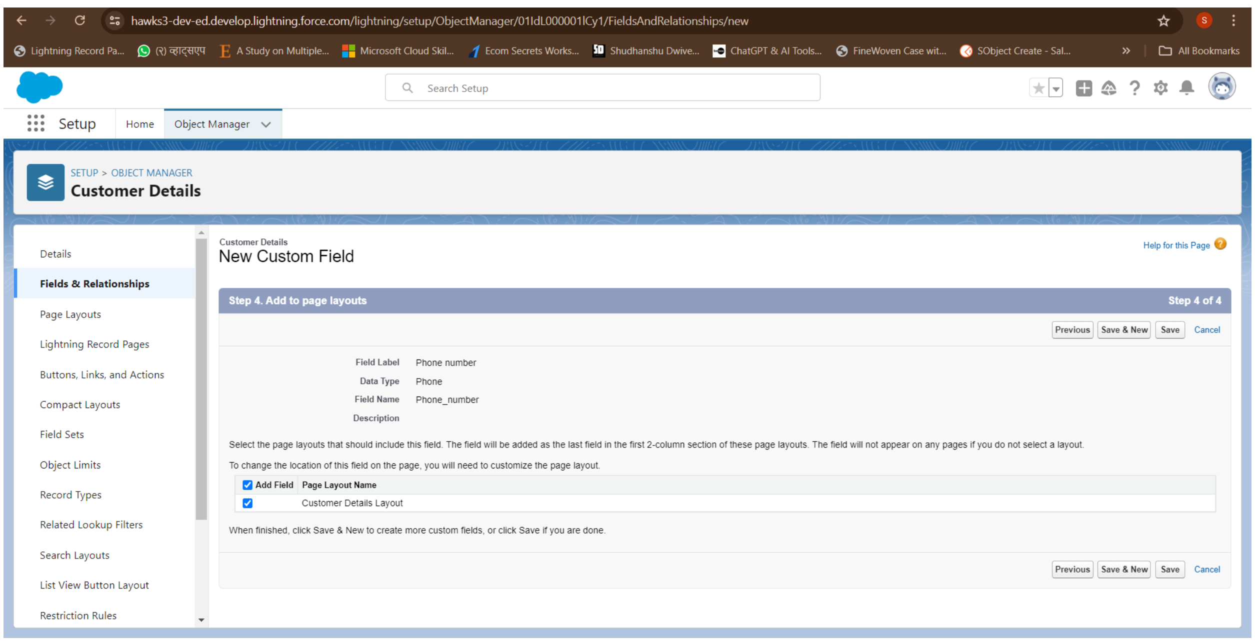


- **Contact Number** (Phone)

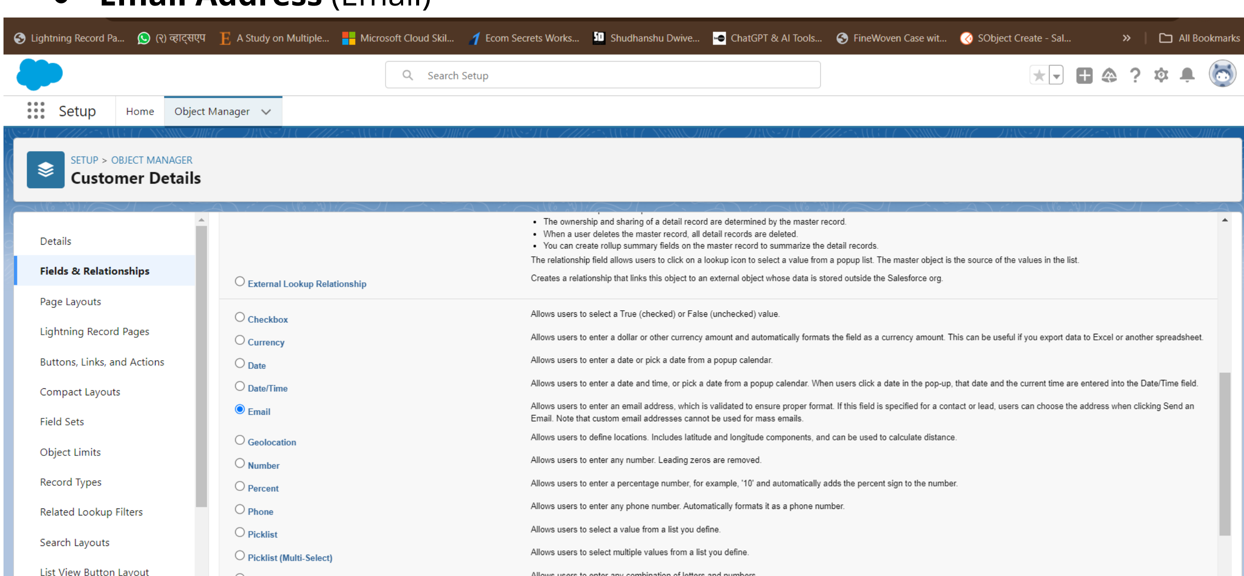


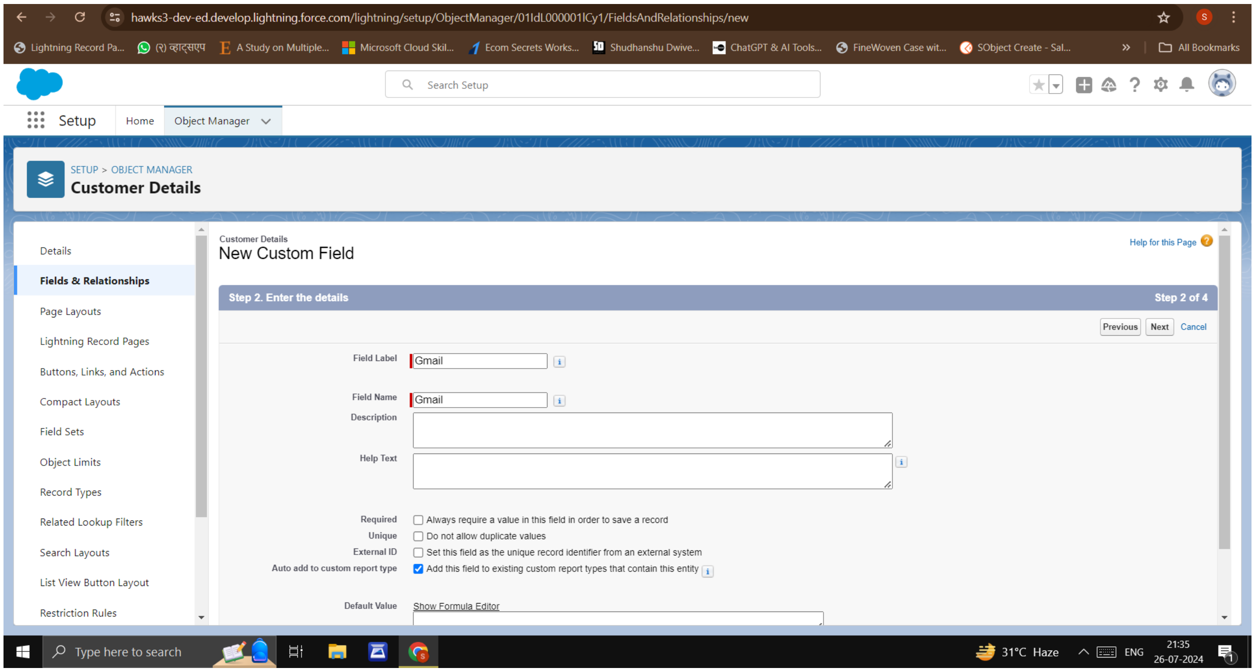






- **Email Address** (Email)





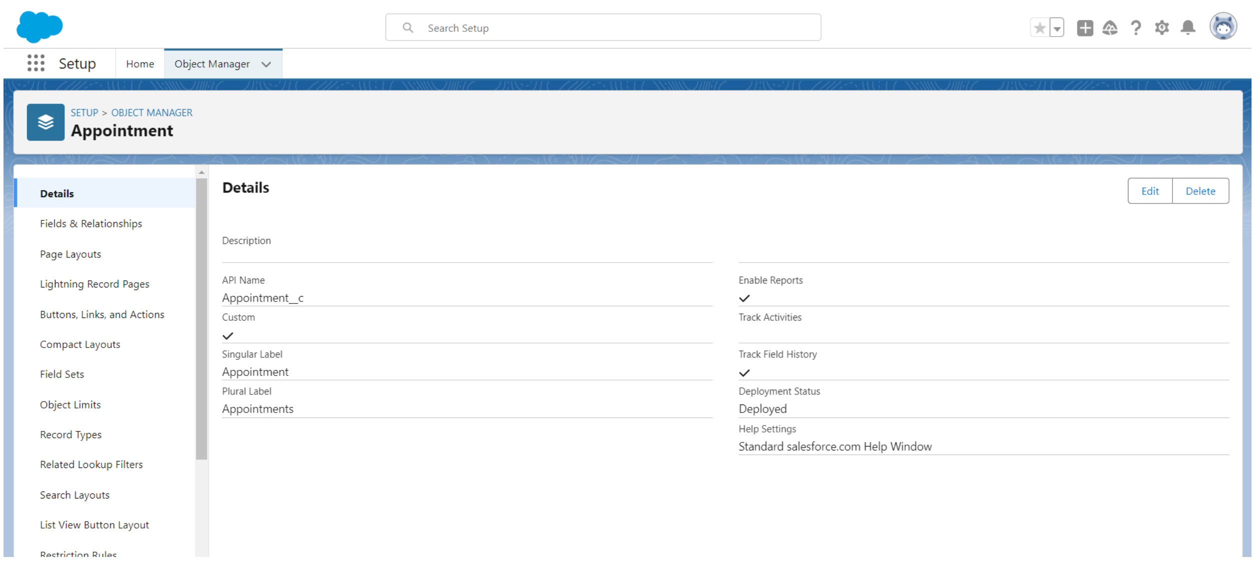
- **Address** (Text Area)

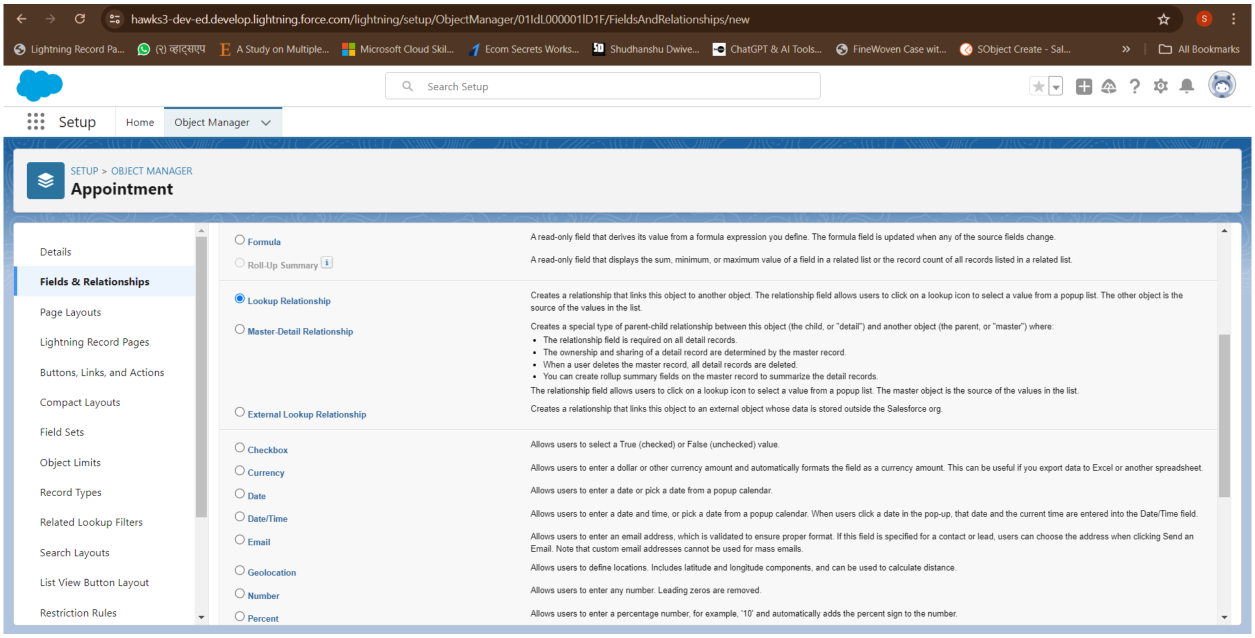
3.2.2 Appointment Object

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**.

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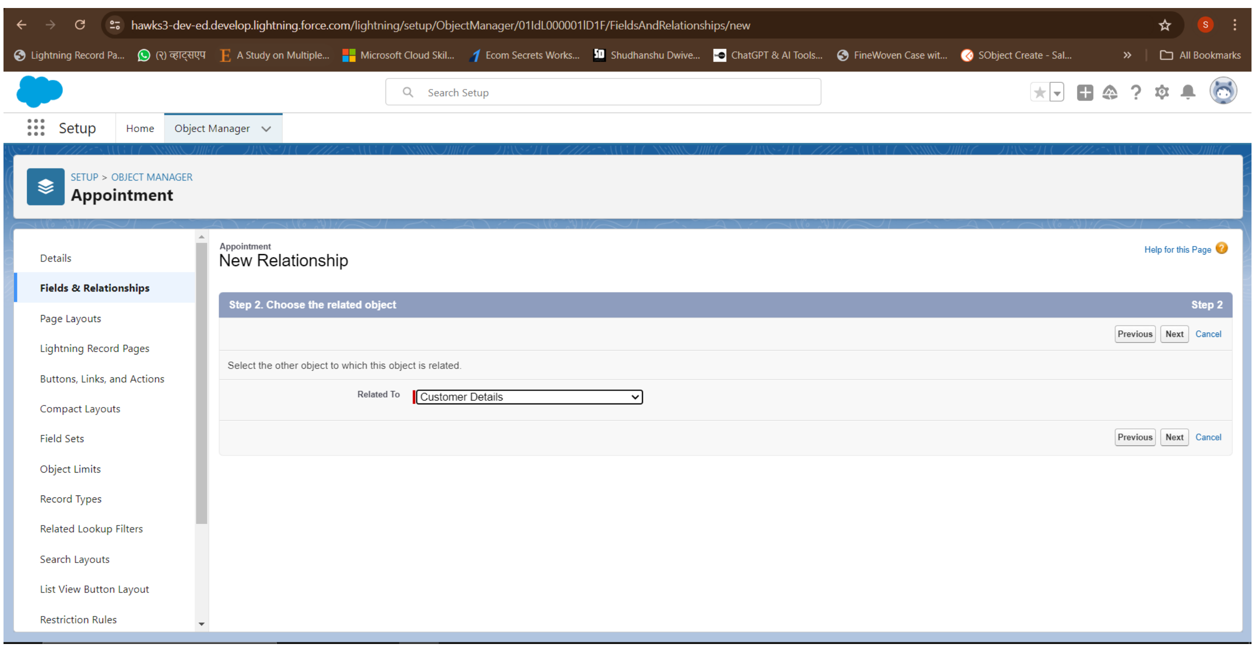
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Formula
A read-only 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.
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.
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.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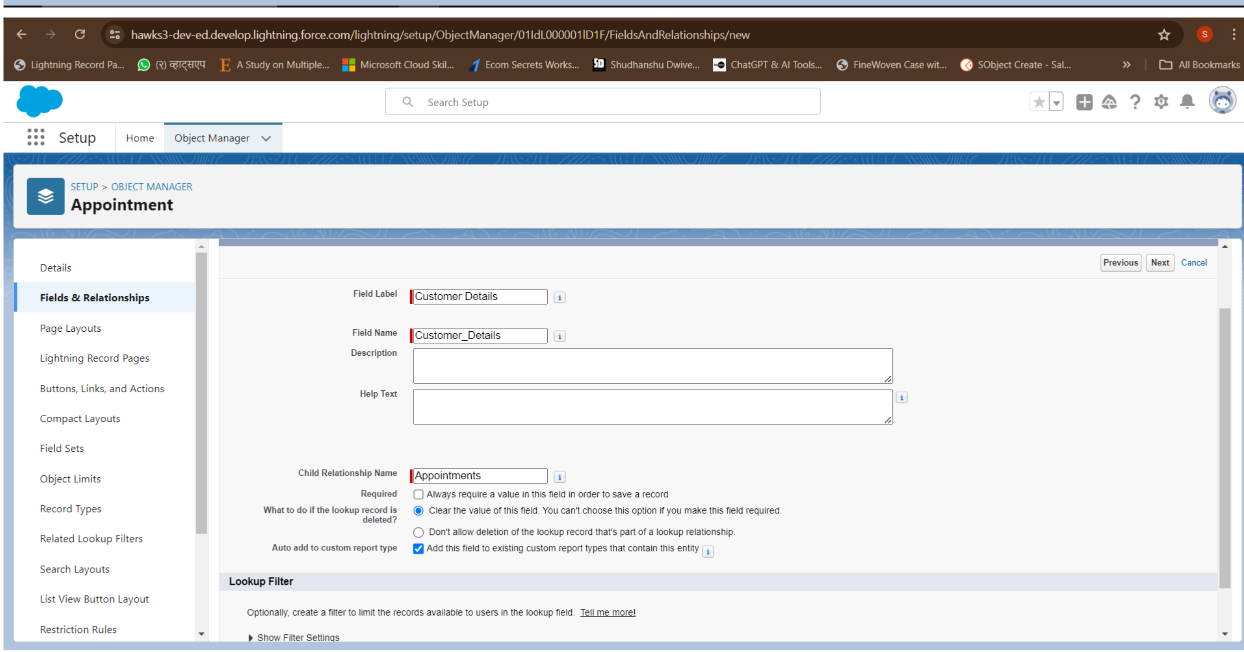
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Appointment
New Relationship
Help for this Page
Step 2. Choose the related object
Step 2
Previous
Next
Cancel
Select the other object to which this object is related.
Related To
Customer Details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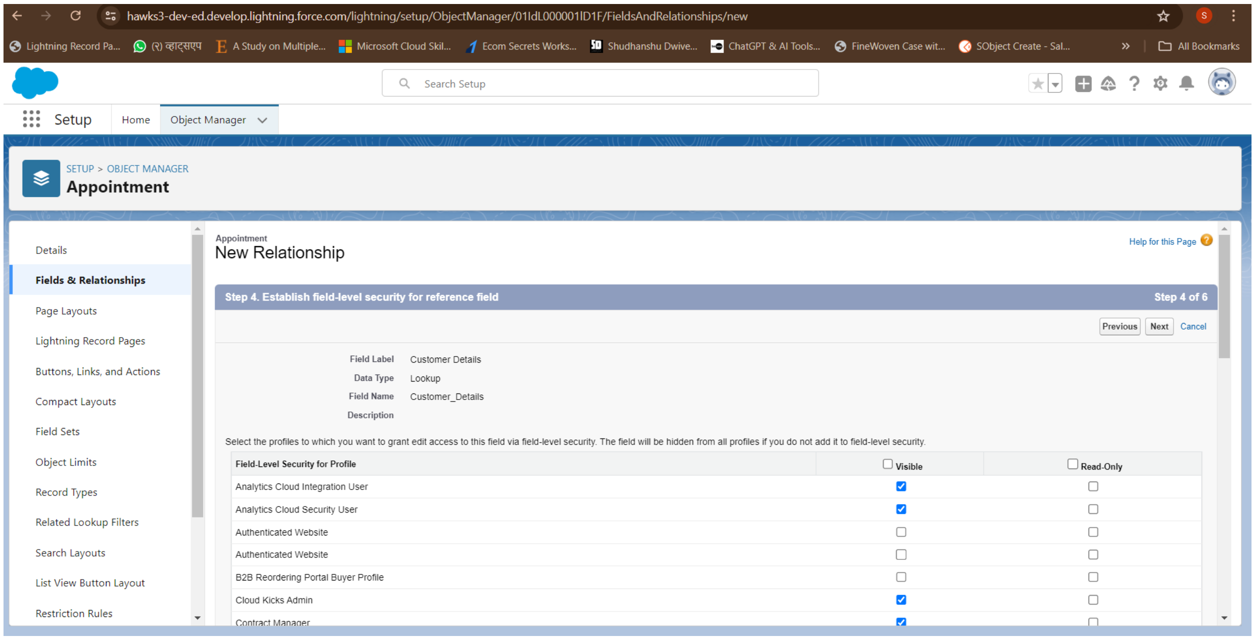
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Previous
Next
Cancel
Field Label
Customer Details
Field Name
Customer_Details
Description
Help Text
Child Relationship Name
Appointments
Required
Always require a value in this field in order to save a record
What to do if the lookup record is deleted?
Clear the value of this field. You can't choose this option if you make this field required.
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
Lookup Filter
Optionally, create a filter to limit the records available to users in the lookup field. Tell me more!
Show Filter Settings

2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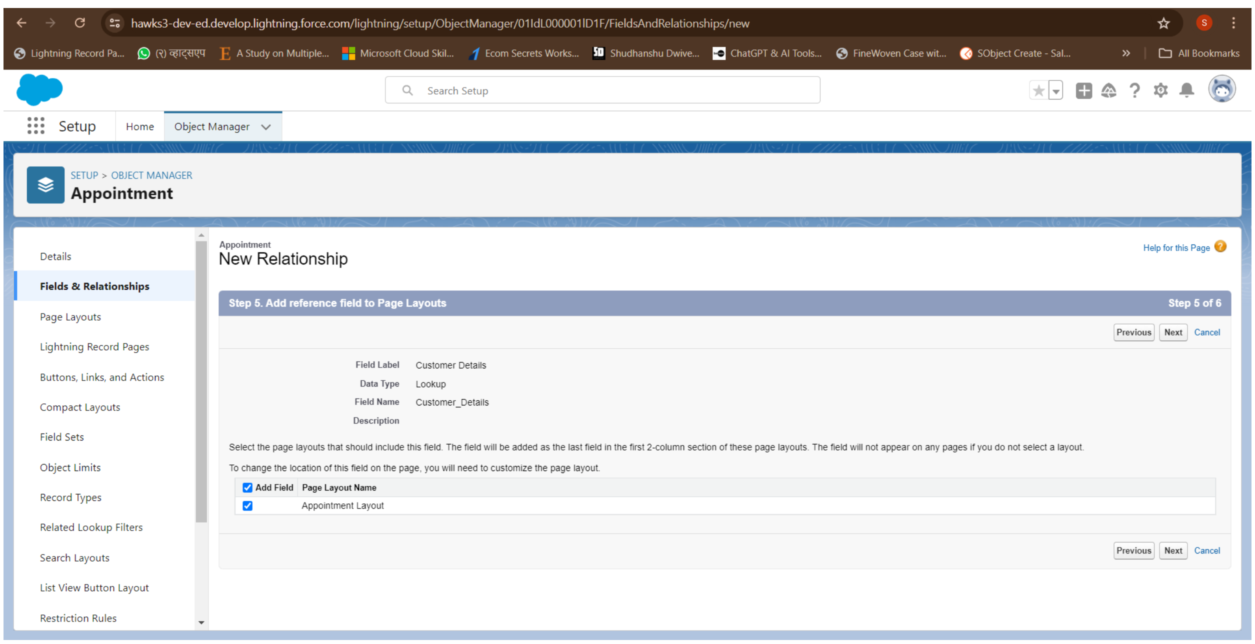
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Appointment
New Relationship
Help for this Page
Step 4. Establish field-level security for reference field
Step 4 of 6
Previous Next Cancel
Field Label Customer Details
Data Type Lookup
Field Name Customer_Details
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
Analytics Cloud Security User
Authenticated Website
Authenticated Website
B2B Reordering Portal Buyer Profile
Cloud Kicks Admin
Contract Manager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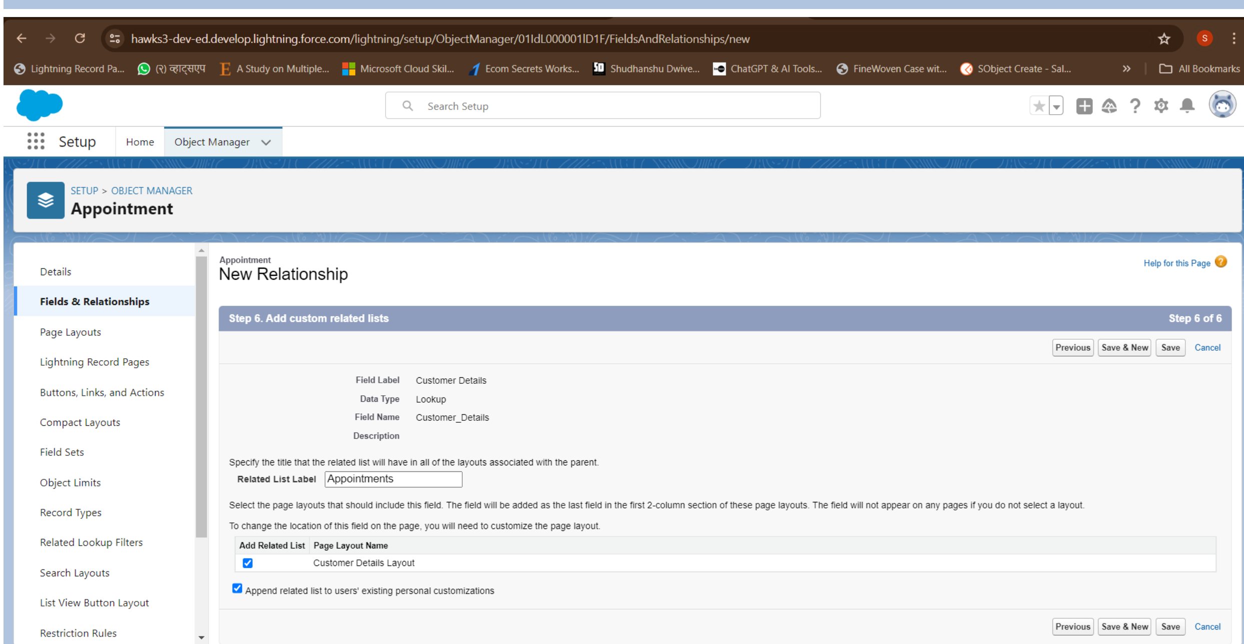
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Appointment
New Relationship
Help for this Page
Step 5. Add reference field to Page Layouts
Step 5 of 6
Previous Next Cancel
Field Label Customer Details
Data Type Lookup
Field Name Customer_Details
Description
Select the page layouts that 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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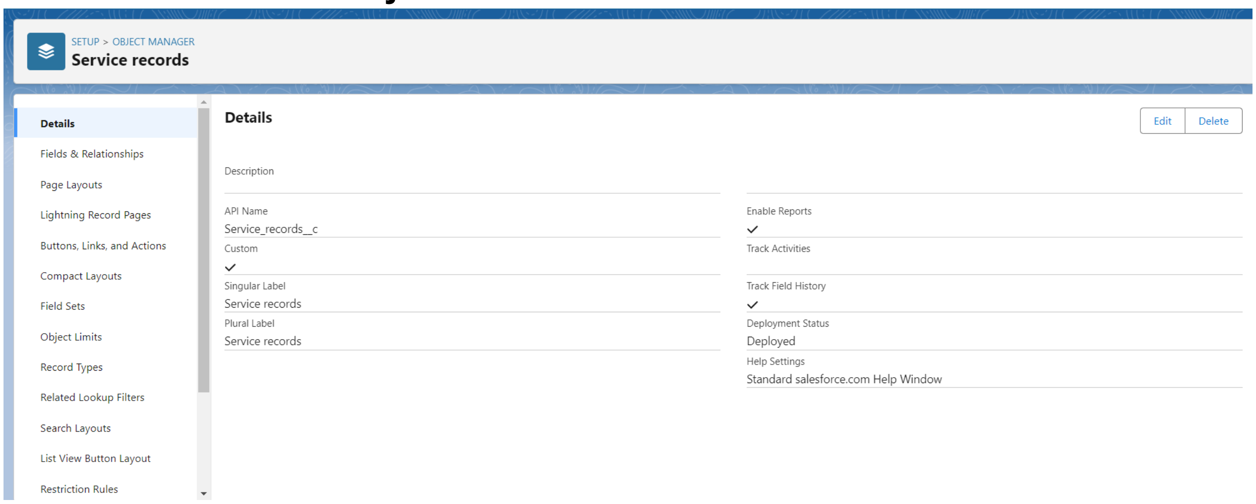
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Appointment
New Relationship
Help for this Page
Step 6. Add custom related lists
Step 6 of 6
Previous Save & New Save Cancel
Field Label Customer Details
Data Type Lookup
Field Name Customer_Details
Description
Specify the title that the related list will have in all of the layouts associated with the parent.
Related List Label Appointments
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

3

Fields Created:

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

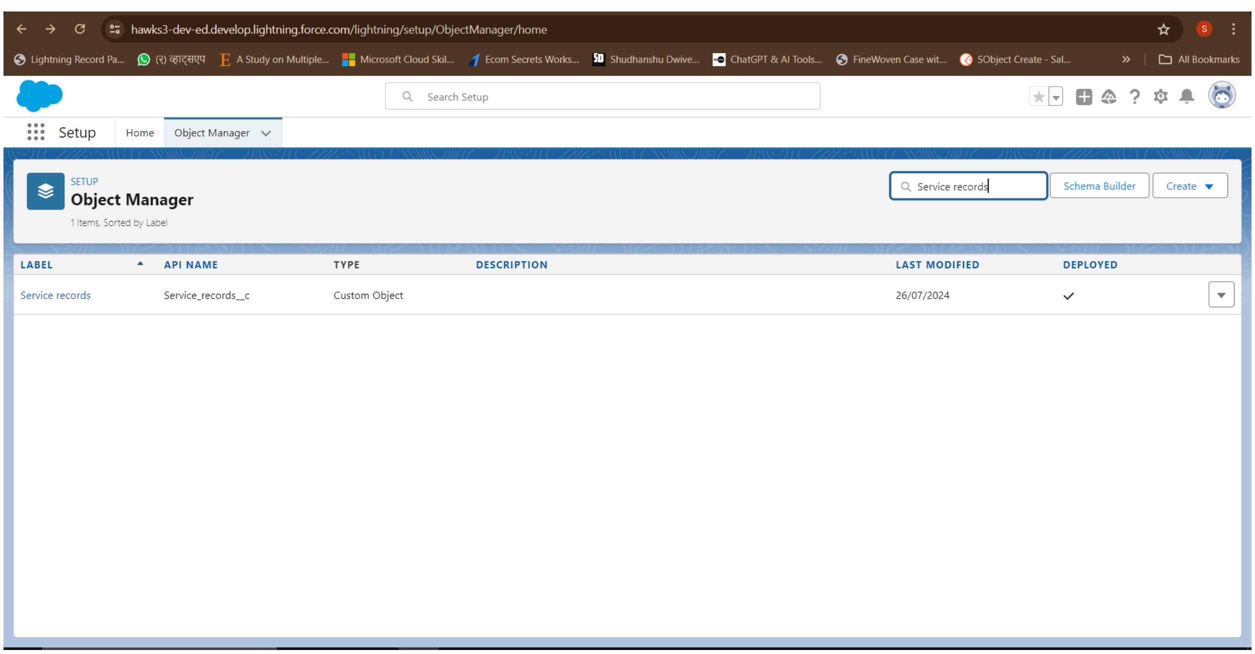
3.2.3 Service Records Object



Task: Create an object to track service details.

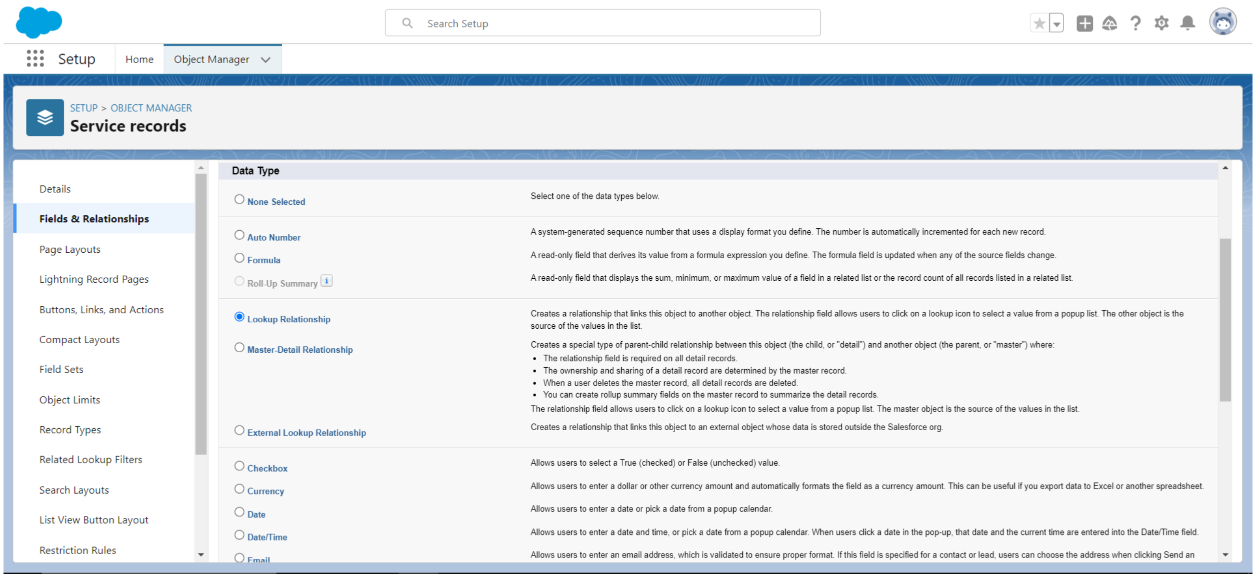
Process:

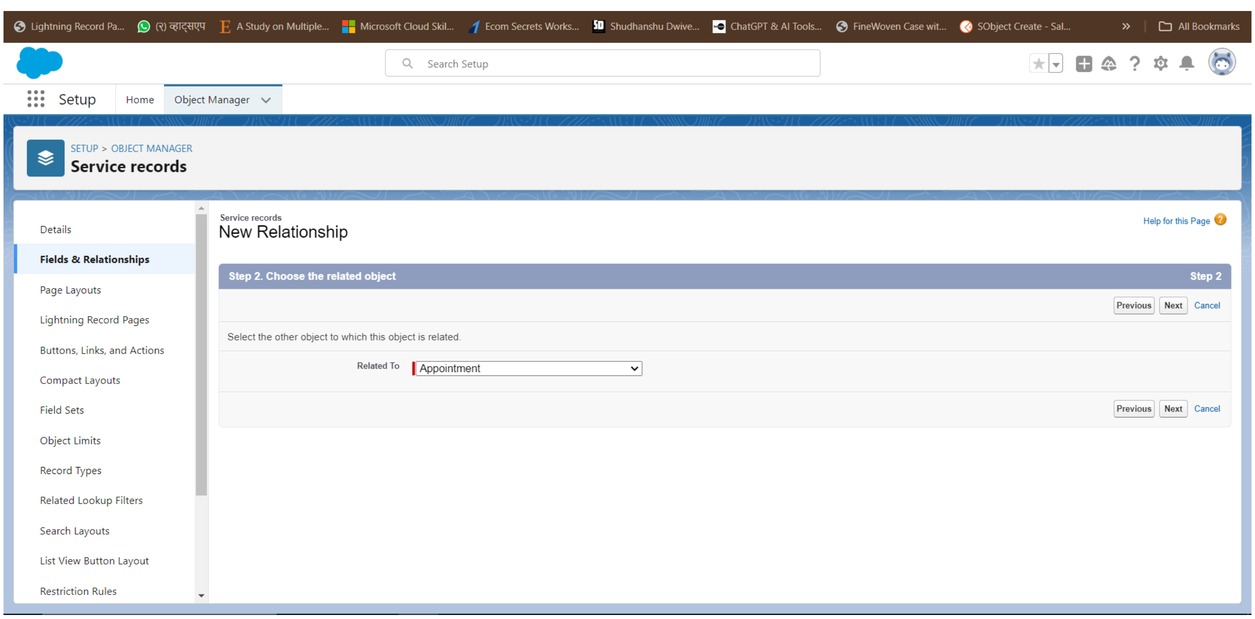
1. Navigate to **Setup** > **Object Manager** > **Create** > **Custom Object**.
2. Name it **Service Records** and use **Service_ID** as the record name.
3. Click **Save**.

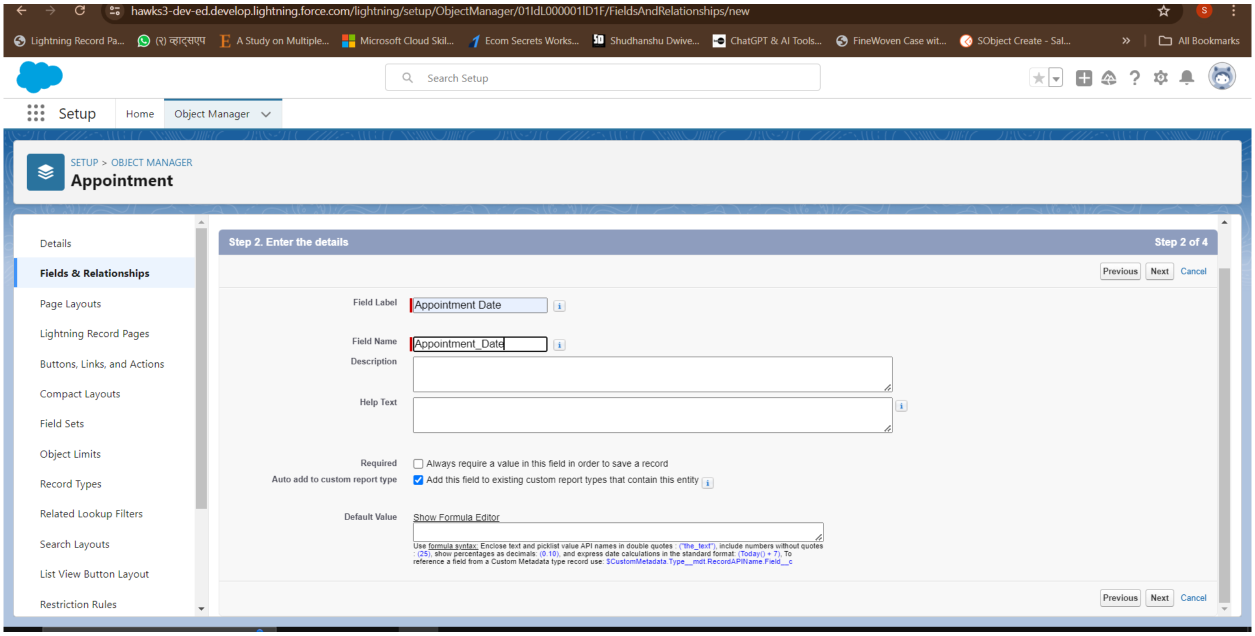


Fields Created:

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



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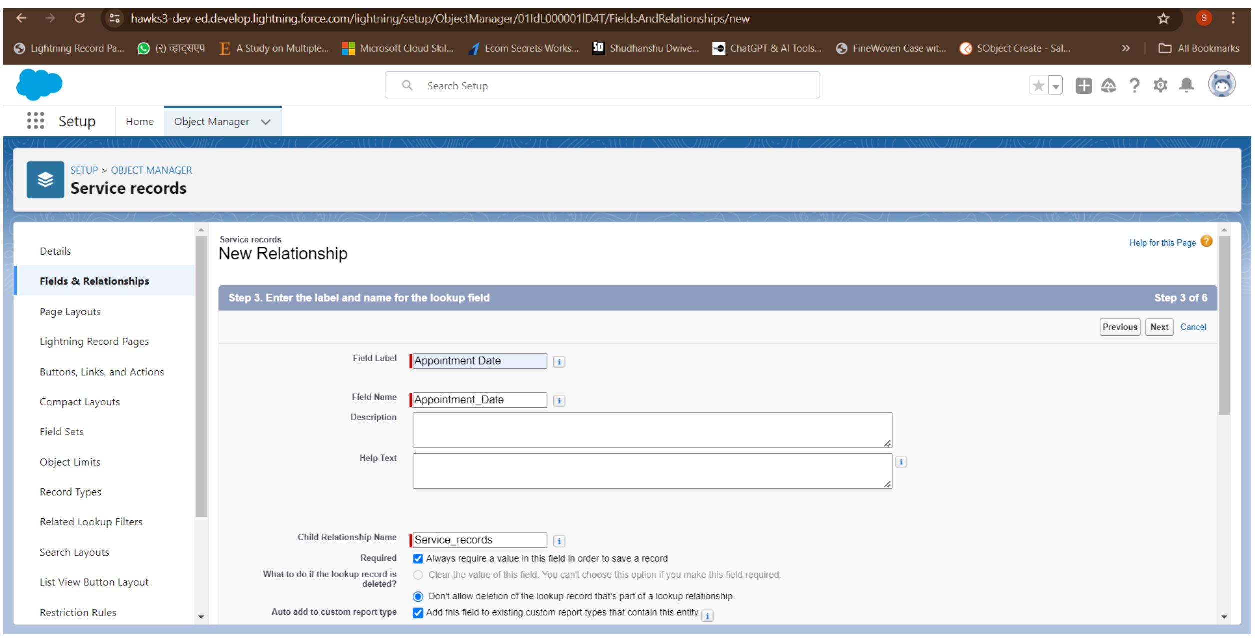
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Step 2. Enter the details
Step 2 of 4
Previous Next Cancel
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
Previous Next Cancel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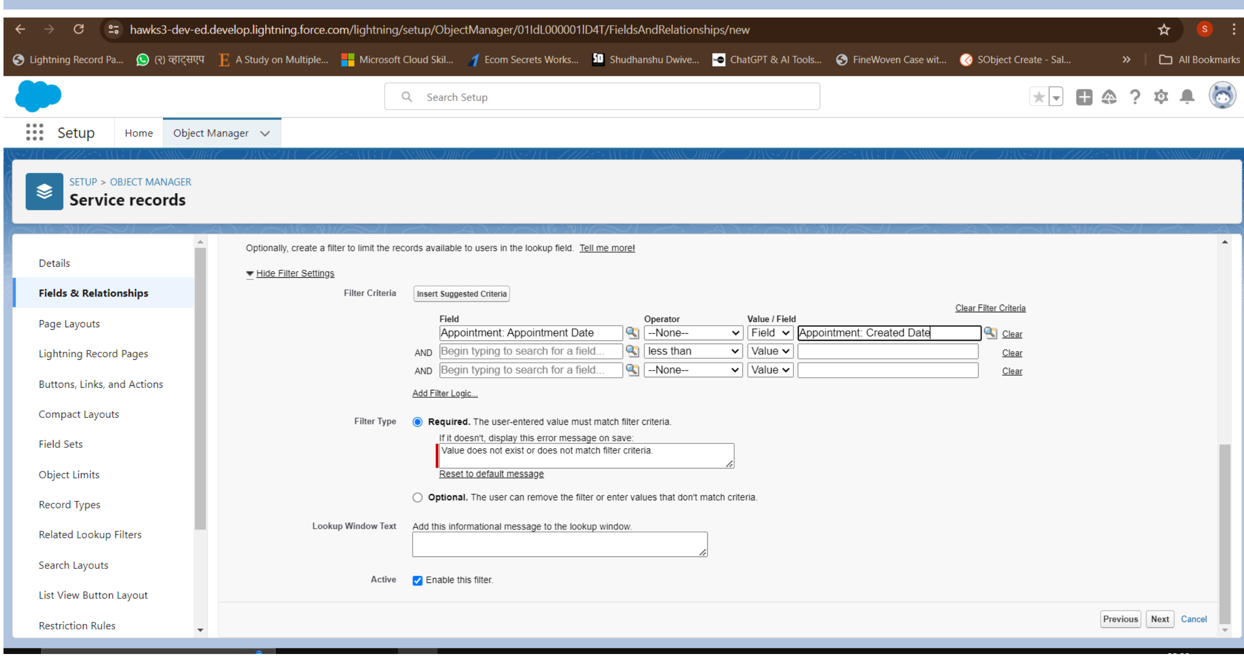
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Service records
Service records
New Relationship
Help for this Page
Step 3. Enter the label and name for the lookup field
Step 3 of 6
Previous Next Cancel
Field Label Appointment Date
Field Name Appointment_Date
Description
Help Text
Child Relationship 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?
Clear the value of this field. You can't choose this option if you make this field required.
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


hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001ID4T/FieldsAndRelationships/new
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Service records
Optionally, 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 Clear
AND Begin typing to search for a field... less than Value Clear
AND Begin typing to search for a field... --None-- Value Clear
Add Filter Logic...
Filter Type 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.
Previous Next Cancel

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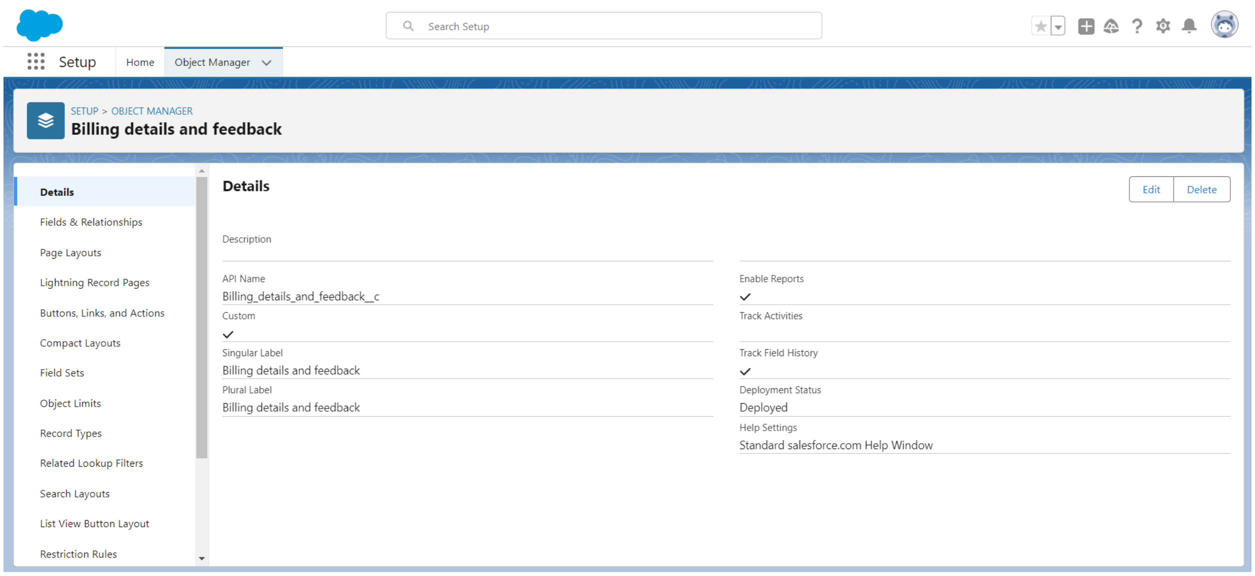
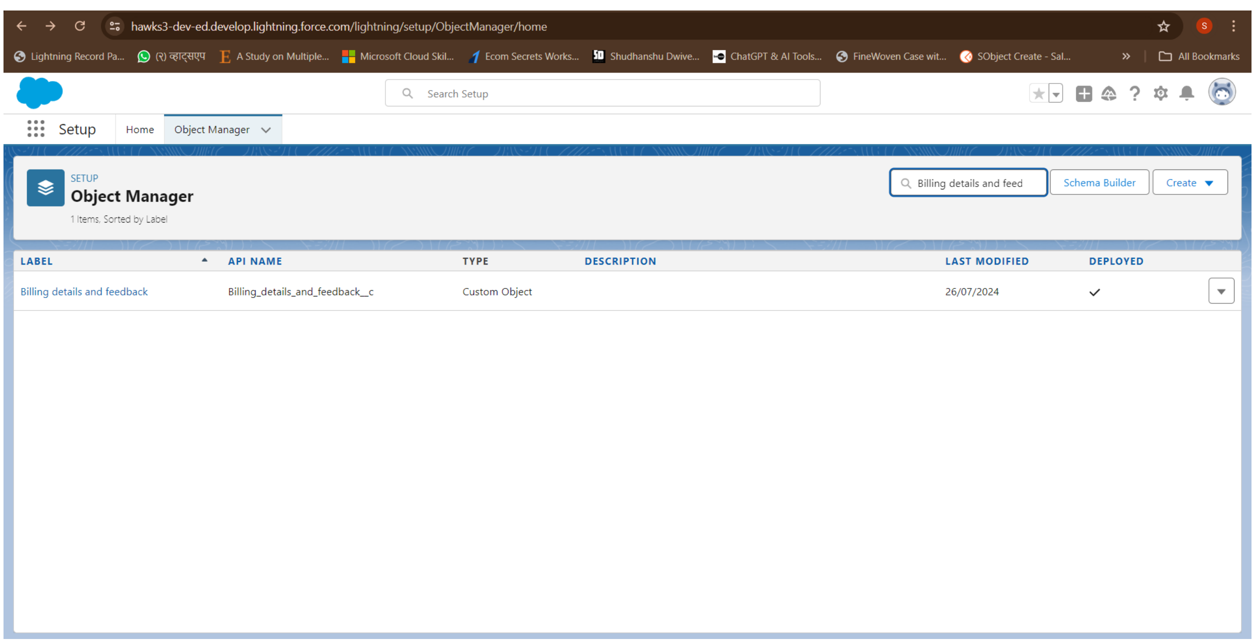
3.2.4 Billing Details and Feedback Object

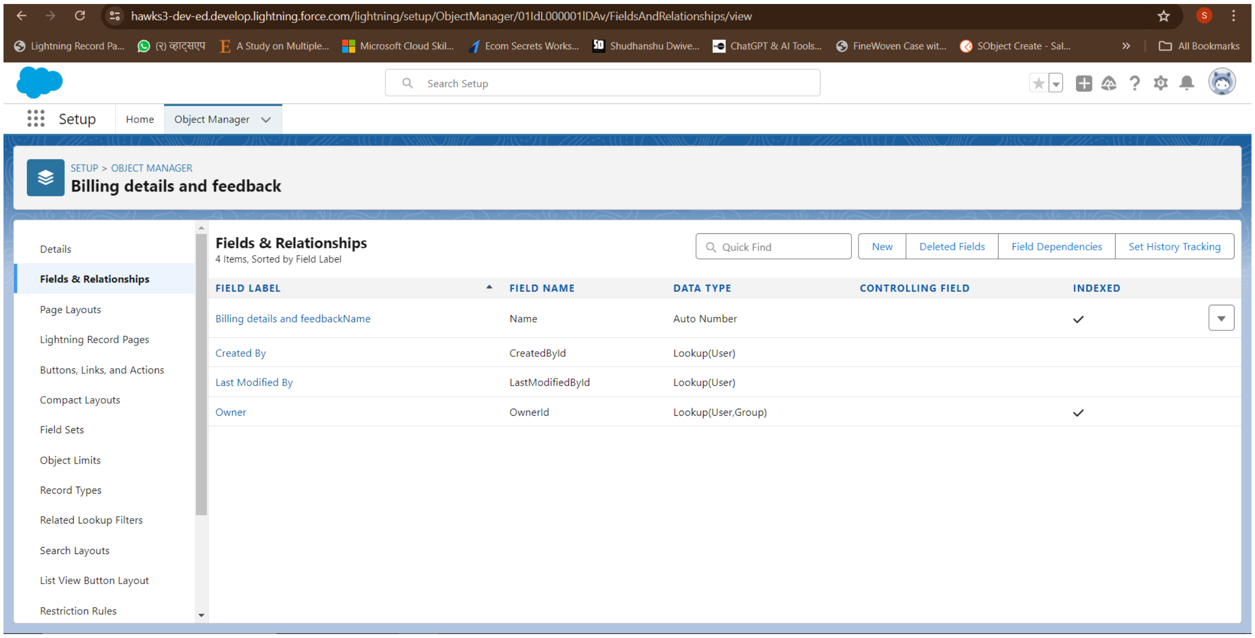
Task: Create an object to manage billing details and customer feedback.

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**.



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Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing details and feedback
Details
Fields & Relationships
Page Layouts
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List View Button Layout
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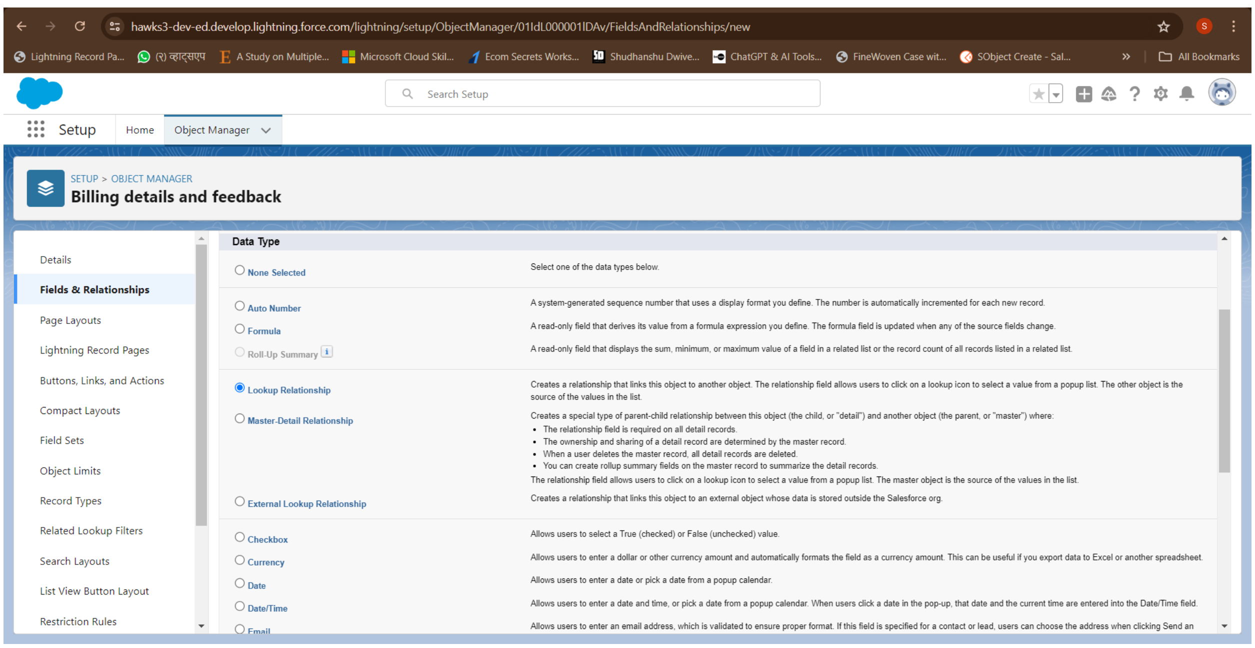
Fields & Relationships
4 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Billing details and feedbackName
Name
Auto Number
Created By
CreatedById
Lookup(User)
Last Modified By
LastModifiedById
Lookup(User)
Owner
OwnerId
Lookup(User,Group)


hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001IDAv/FieldsAndRelationships/new
SETUP > OBJECT MANAGER
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:
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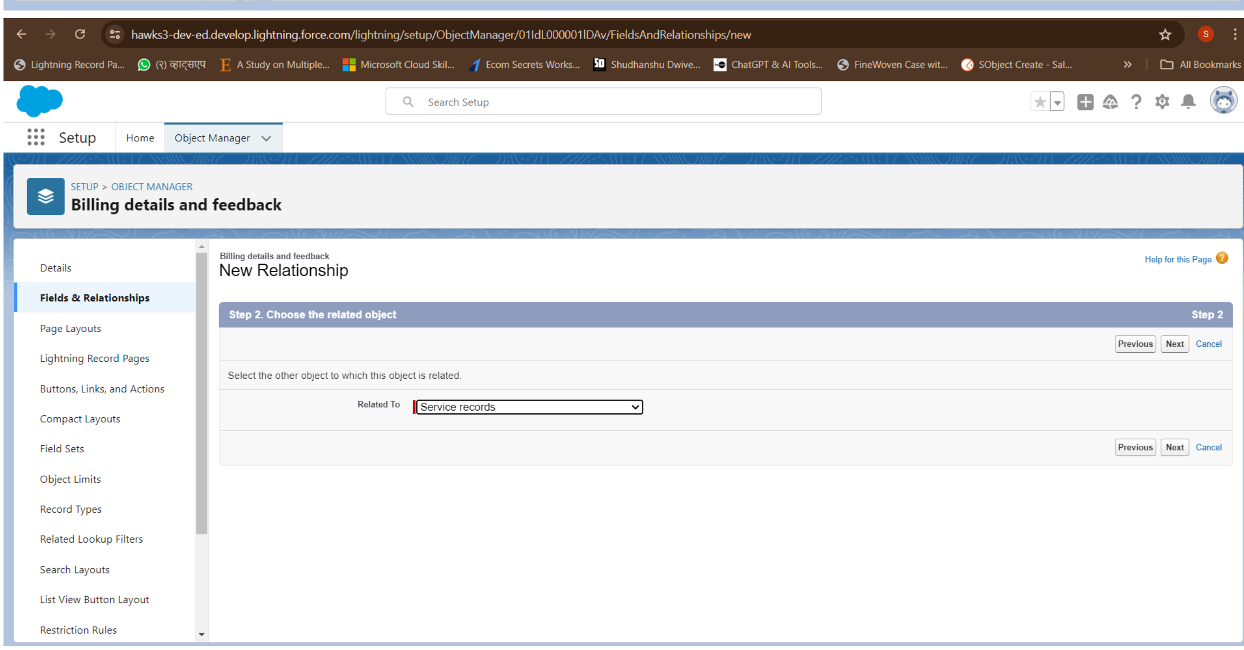
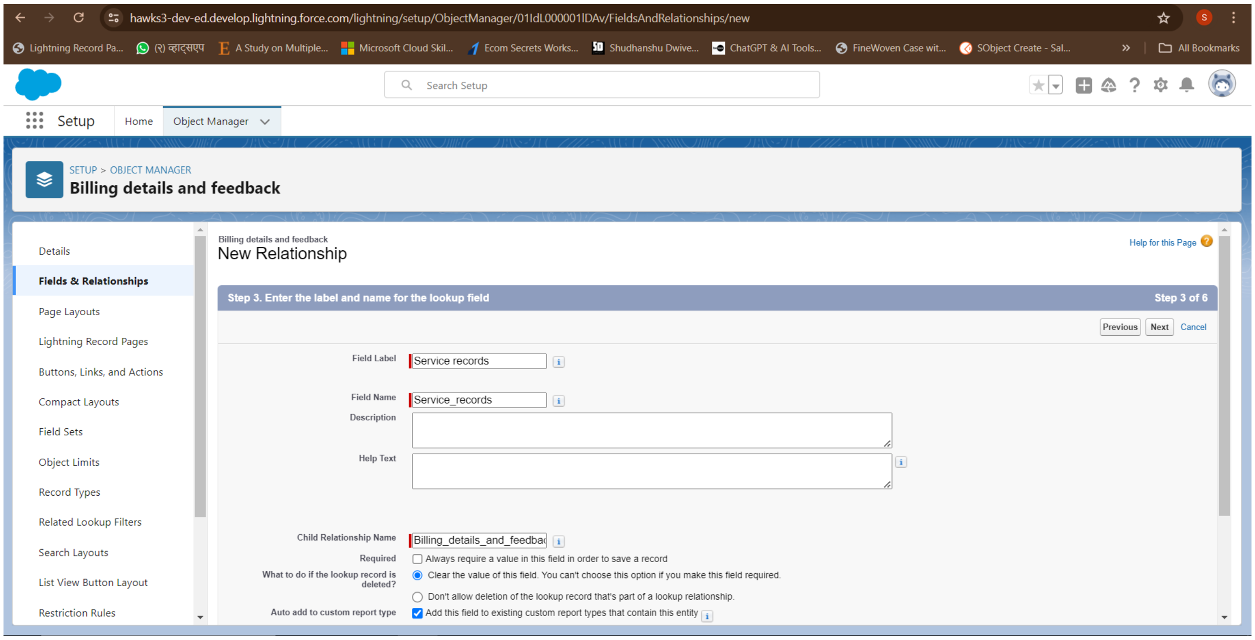
The ownership and sharing of a detail record are determined by the master record.
When a user deletes the master record, all detail records are deleted.
You can create rollup summary fields on the master record to summarize the detail records.
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
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


hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001IDAv/FieldsAndRelationships/new
SETUP > OBJECT MANAGER
Billing details and feedback
Billing details and feedback
New Relationship
Help for this Page
Step 2. Choose the related object
Step 2
Previous
Next
Cancel
Select the other object to which this object is related.
Related To
Service records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Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing details and feedback
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Fields & Relationships
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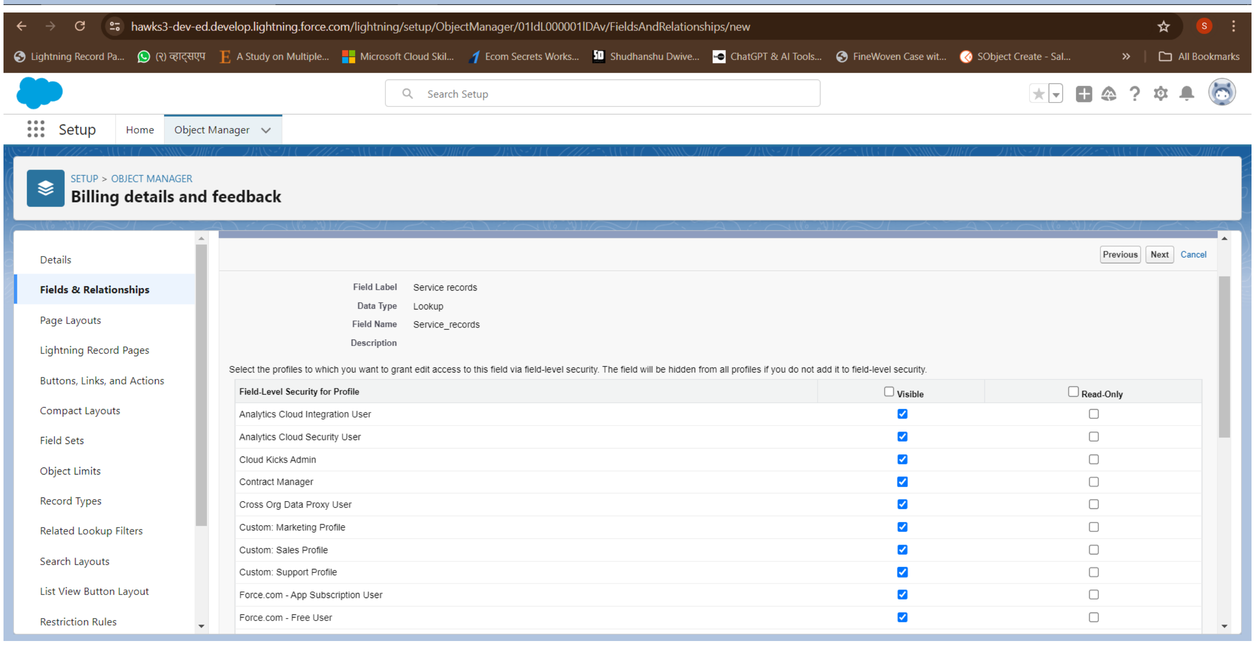
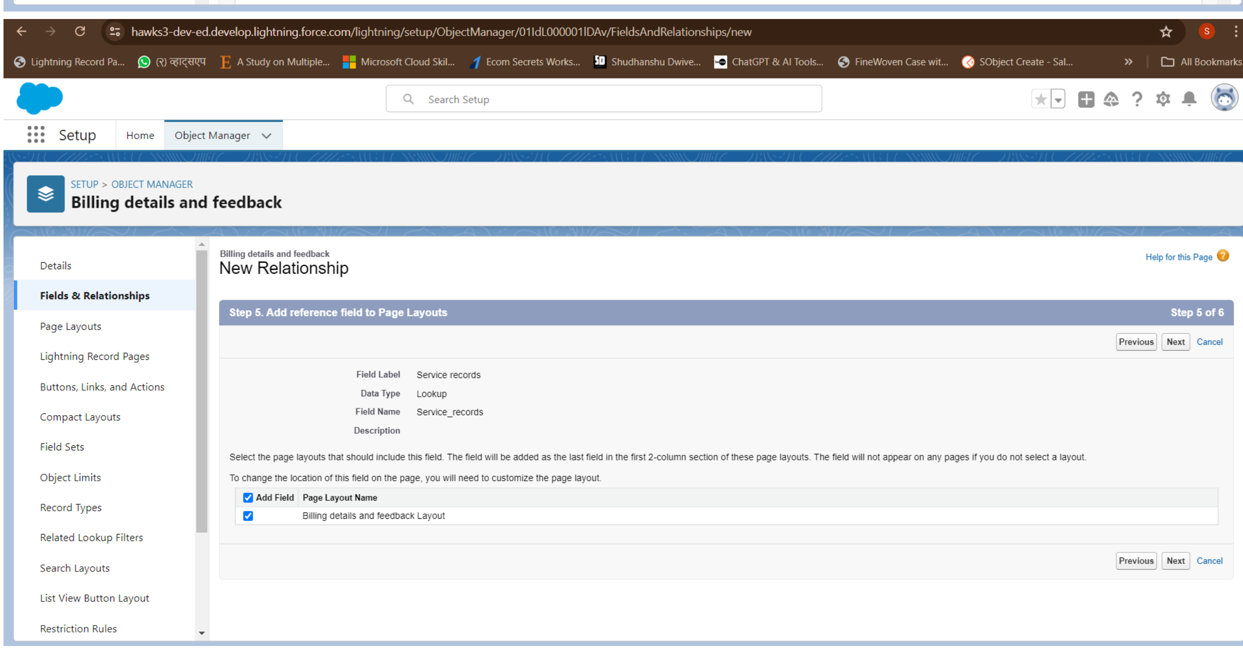
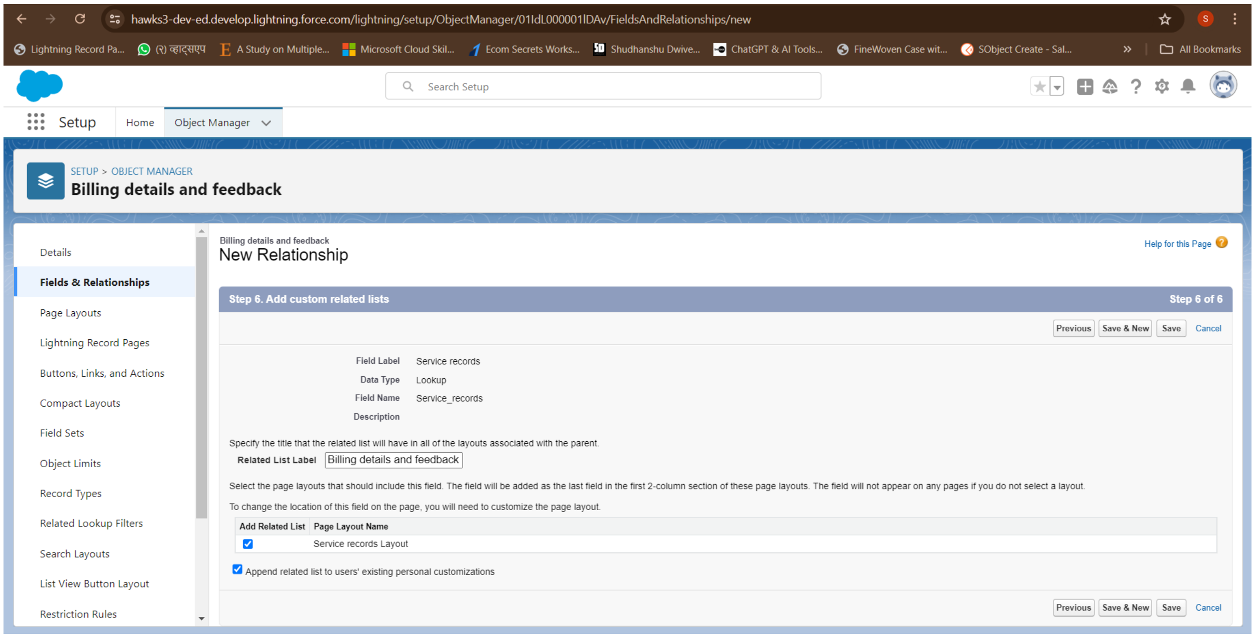
Restriction Rules
Billing details and feedback
New Relationship
Help for this Page
Step 3. Enter the label and name for the lookup field
Step 3 of 6
Previous
Next
Cancel
Field Label
Service records
Field Name
Service_records
Description
Help Text
Child Relationship Name
Billing_details_and_feedbac
Required
Always require a value in this field in order to save a record
What to do if the lookup record is deleted?
Clear the value of this field. You can't choose this option if you make this field required.
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

hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001IDAv/FieldsAndRelationships/new
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing details and feedback
Previous
Next
Cancel
Field Label
Service records
Data Type
Lookup
Field Name
Service_records
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
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
Force.com - Free User

hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001IDAv/FieldsAndRelationships/new
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing details and feedback
Billing details and feedback
New Relationship
Help for this Page
Step 5. Add reference field to Page Layouts
Step 5 of 6
Previous
Next
Cancel
Field Label
Service records
Data Type
Lookup
Field Name
Service_records
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



Fields Created:

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

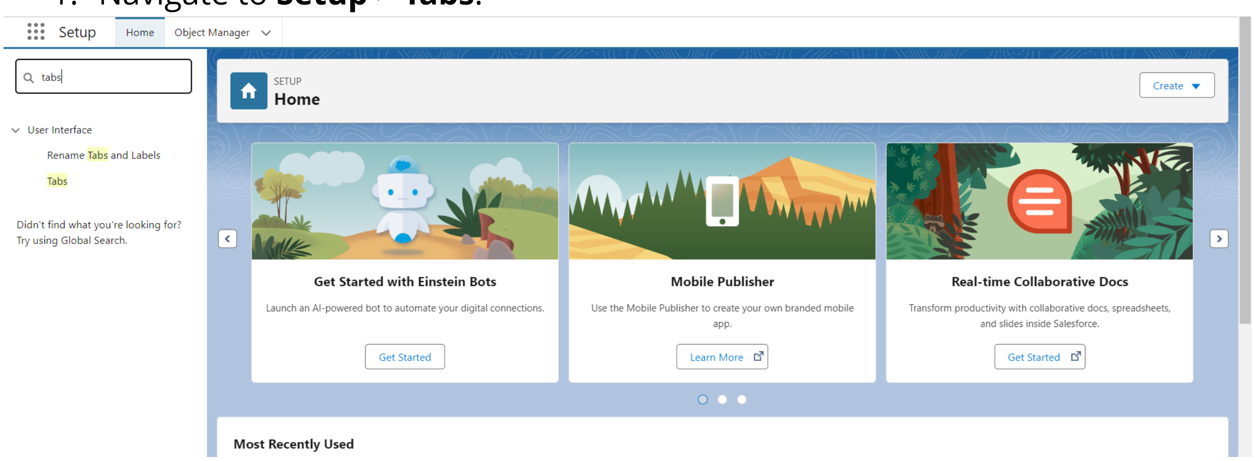
3.3 Tabs Creation

3.3.1 Creating Custom Tabs

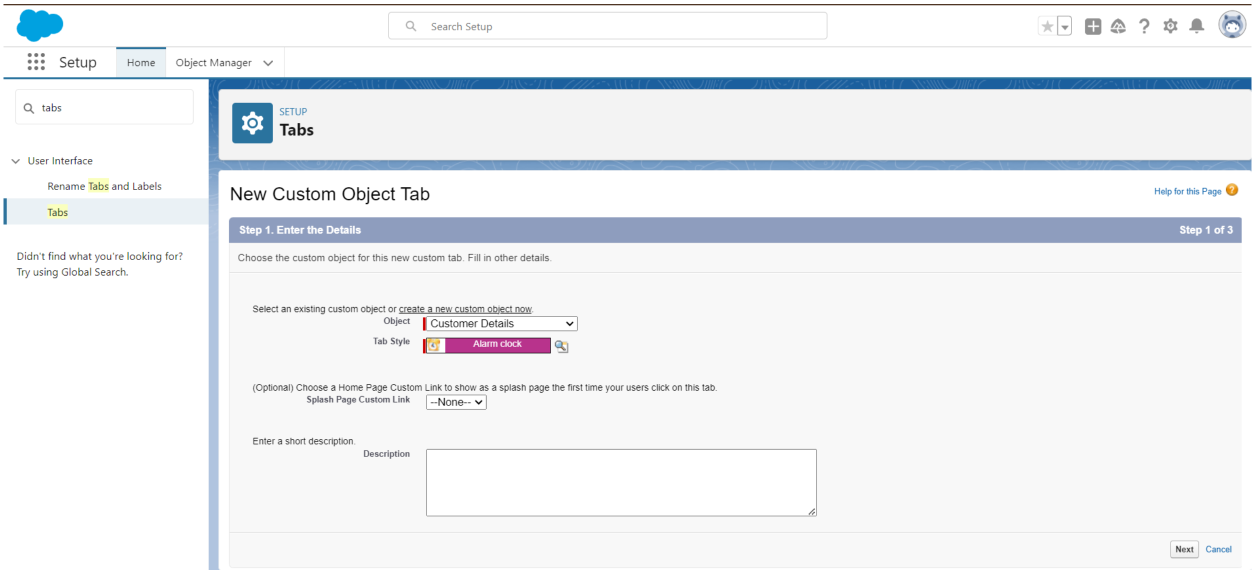
Task: Create tabs for each custom object for easy navigation.

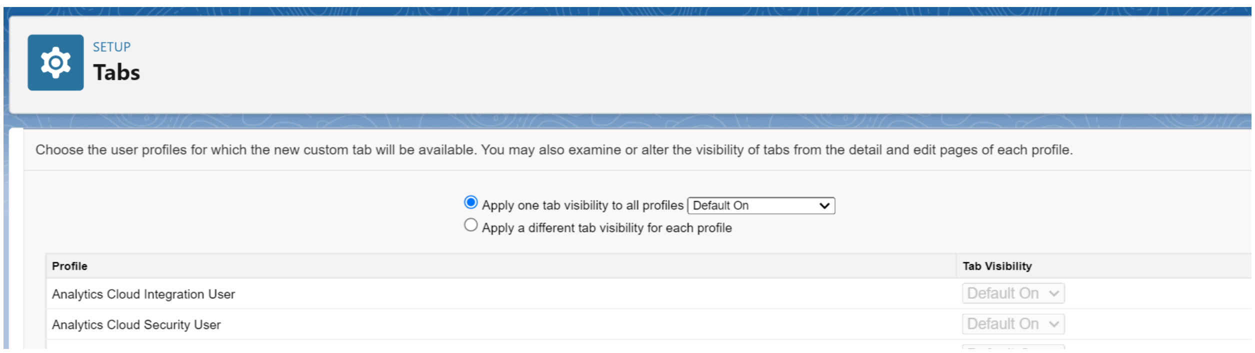
Process:

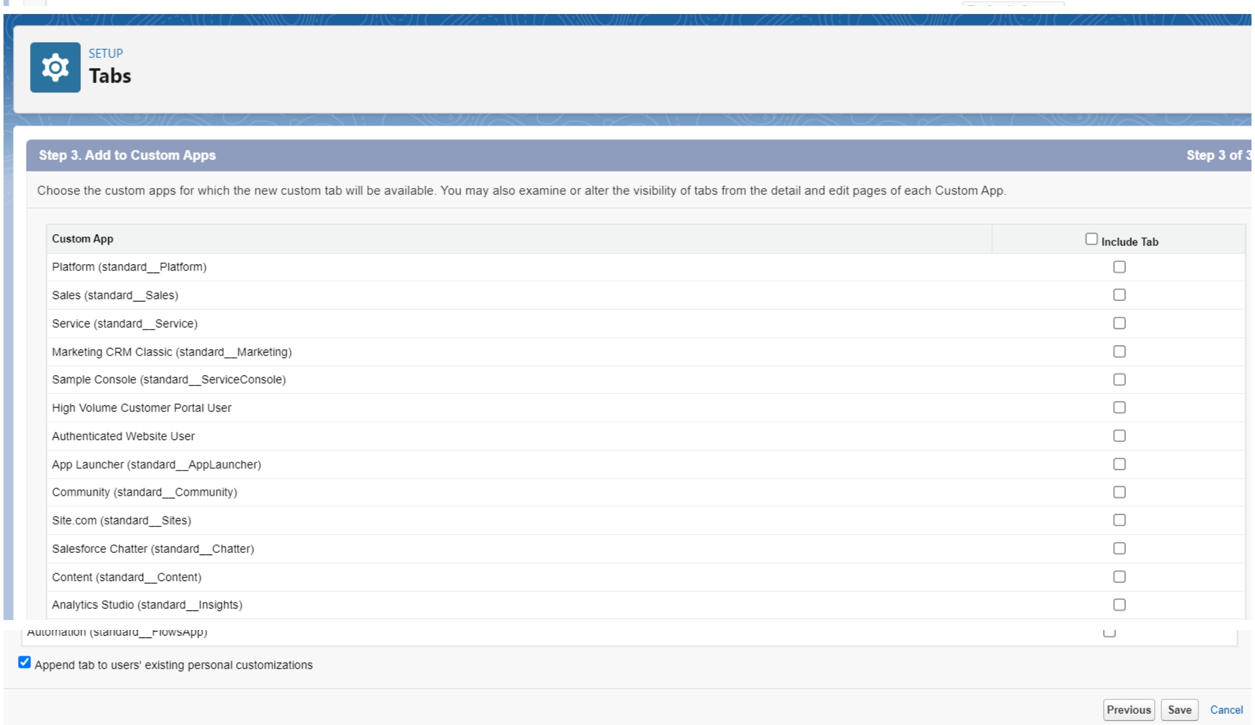
1. Navigate to **Setup** > **Tabs**.

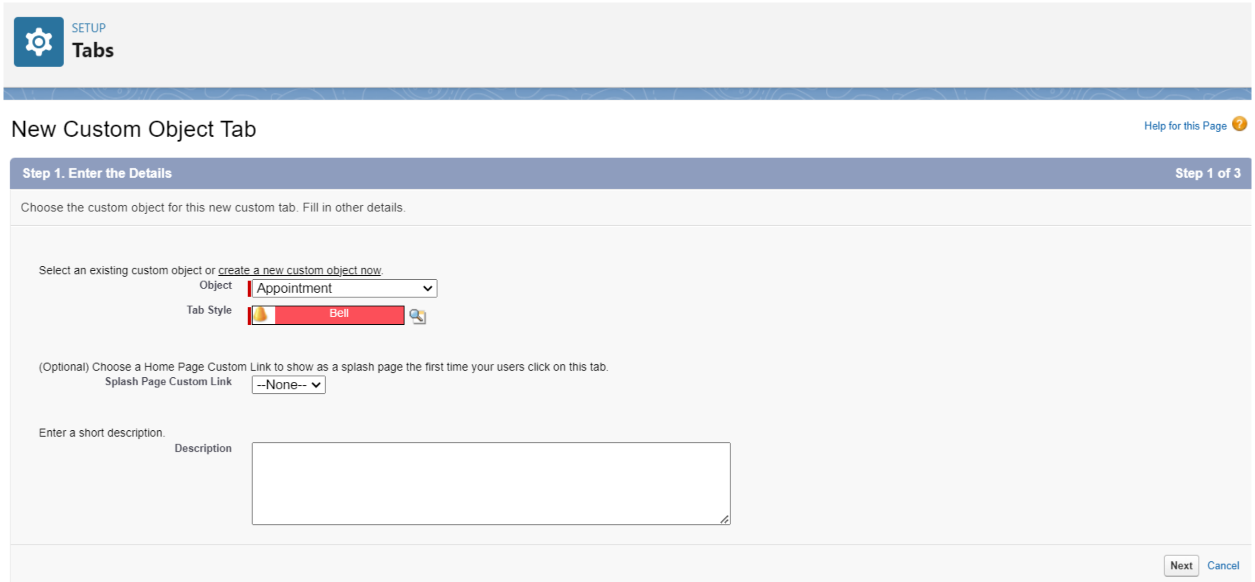


2. Click **New** under Custom Tabs.


Search Setup
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
Help for this Page
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
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
Include Tab
Platform (standard__Platform)
Sales (standard__Sales)
Service (standard__Service)
Marketing CRM Classic (standard__Marketing)
Sample Console (standard__ServiceConsole)
High Volume Customer Portal User
Authenticated Website User
App Launcher (standard__AppLauncher)
Community (standard__Community)
Site.com (standard__Sites)
Salesforce Chatter (standard__Chatter)
Content (standard__Content)
Analytics Studio (standard__Insights)
Automation (standard__FlowsApp)
Append tab to users' existing personal customizations
Previous
Save
Cancel


SETUP
Tabs
New Custom Object Tab
Help for this Page
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
Help for this Page
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
Help for this Page
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

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

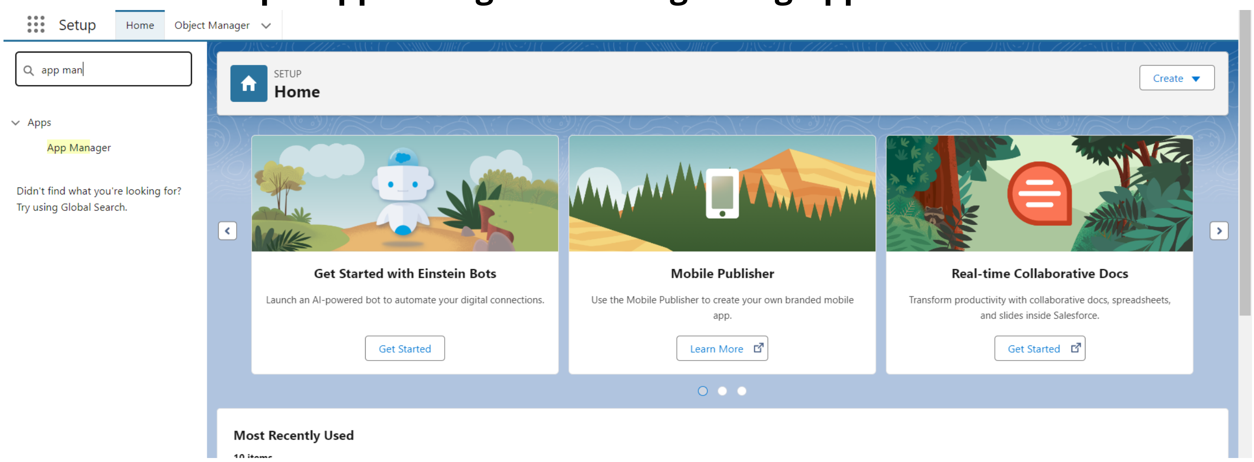
3.4 The Lightning App

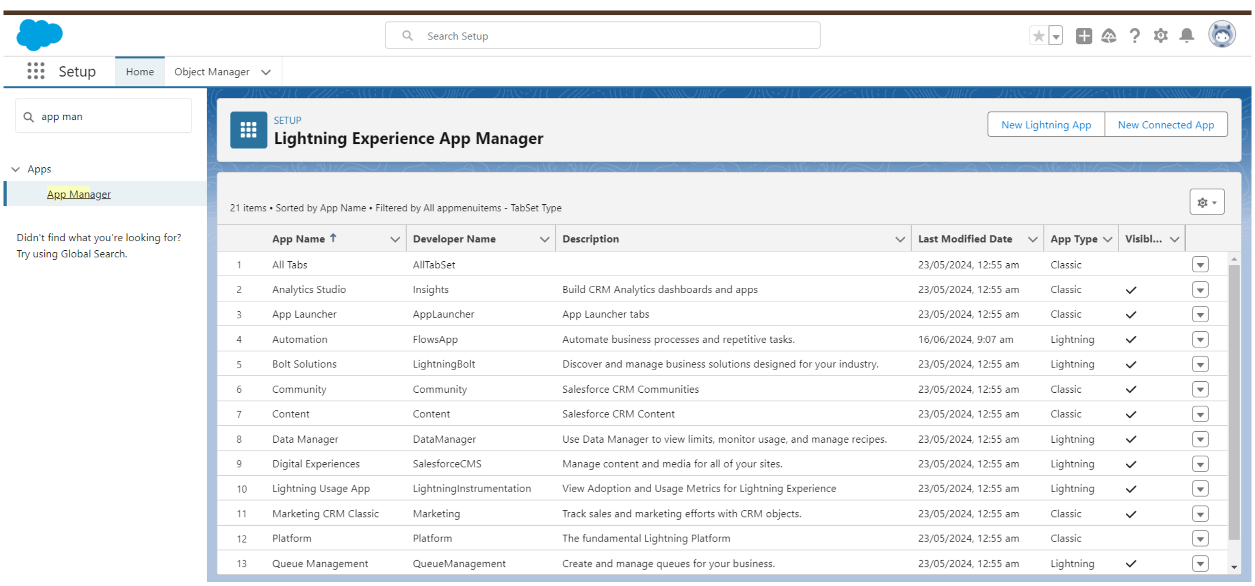
3.4.1 Creating a Lightning App

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

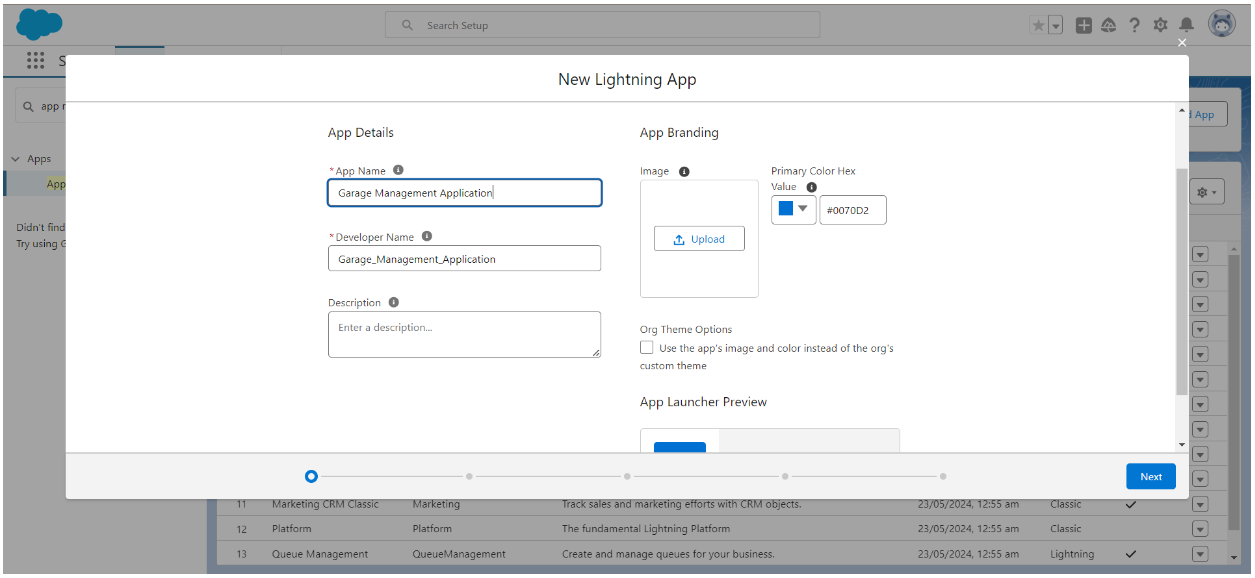
Process:

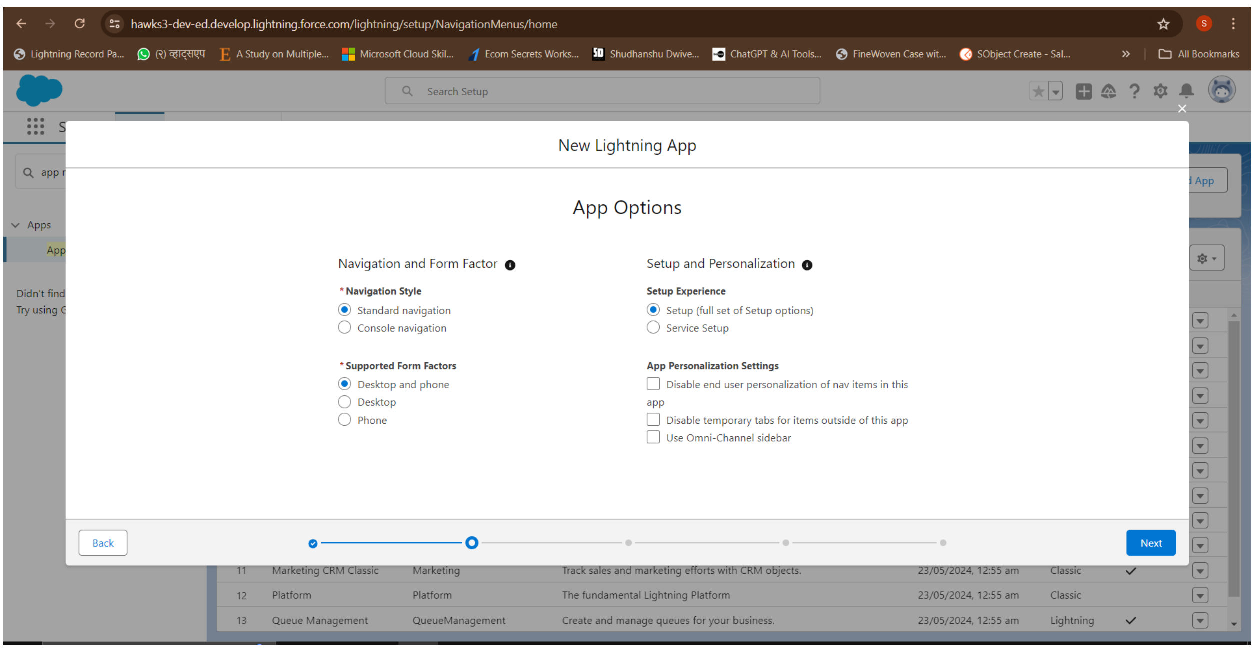
1. Go to **Setup** > **App Manager** > **New Lightning App**.

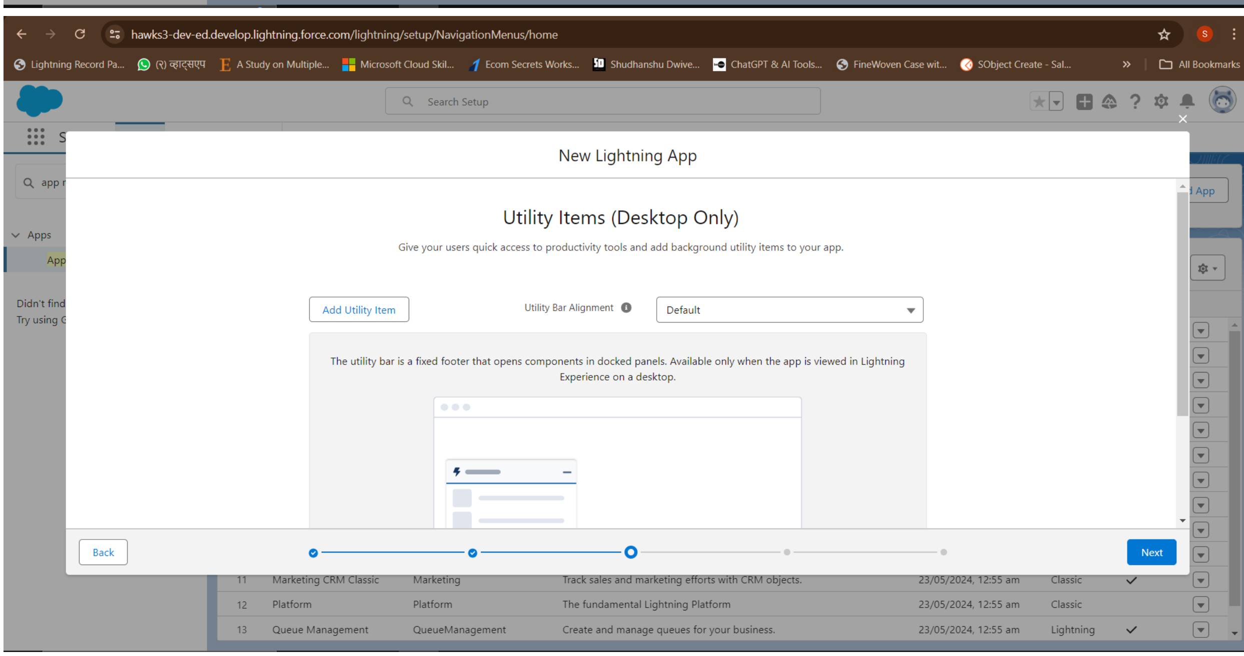


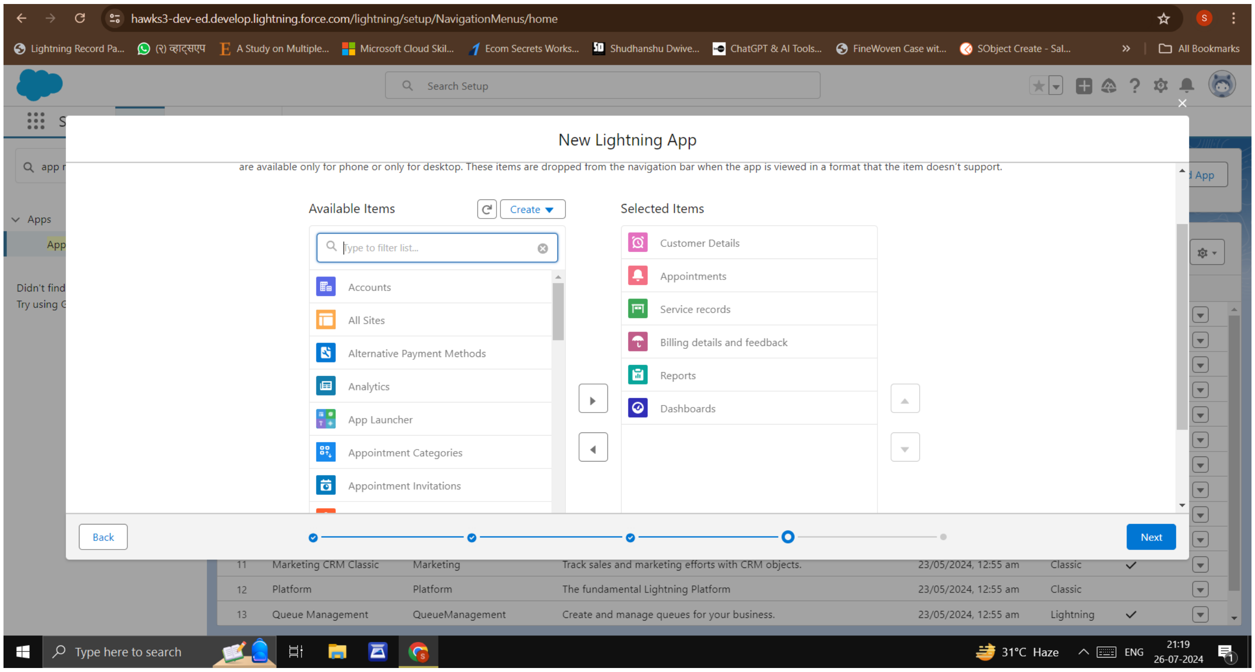


2. Provide a name for the app (e.g., "Garage Management").

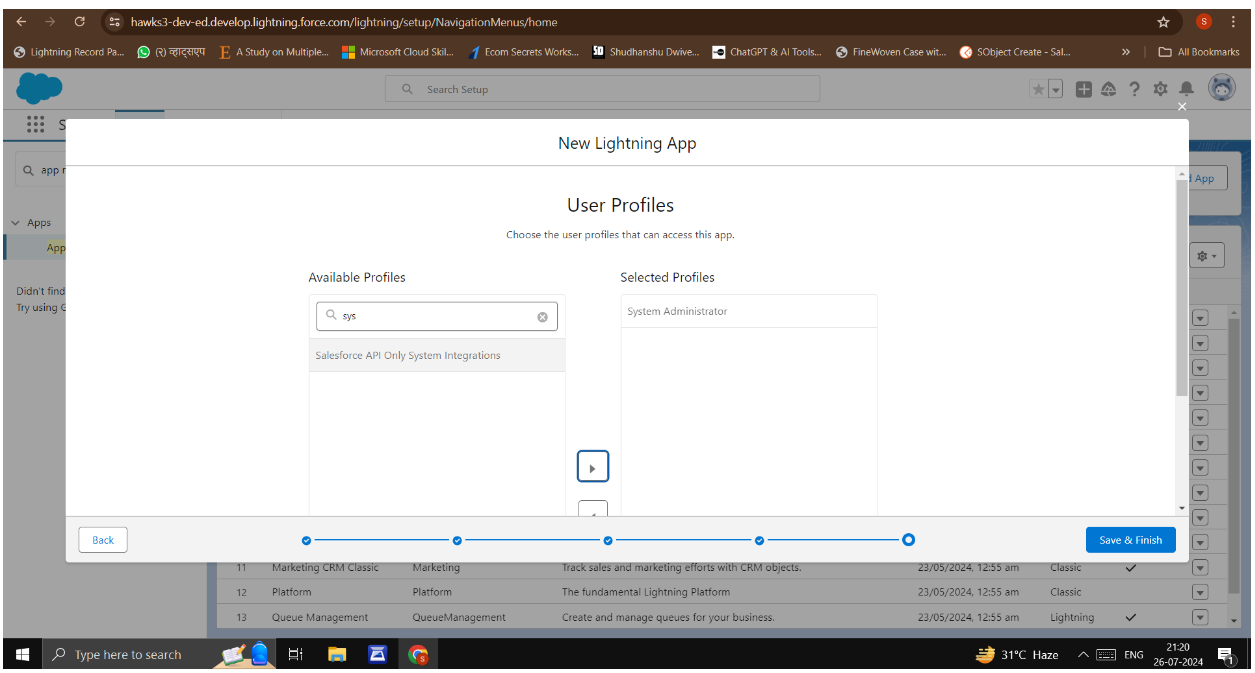

New Lightning App
App Details
* App Name
Garage Management Application
* Developer Name
Garage_Management_Application
Description
Enter a description...
App Branding
Image
Upload
Primary Color Hex Value
#0070D2
Org Theme Options
Use the app's image and color instead of the org's custom theme
App Launcher Preview
Next


hawks3-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home
New Lightning App
App Options
Navigation and Form Factor
* Navigation Style
Standard navigation
Console navigation
* Supported Form Factors
Desktop and phone
Desktop
Phone
Setup and Personalization
Setup Experience
Setup (full set of Setup options)
Service Setup
App Personalization Settings
Disable end user personalization of nav items in this app
Disable temporary tabs for items outside of this app
Use Omni-Channel sidebar
Back
Next


hawks3-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home
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
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.
Back
Next



3. Add the previously created tabs and objects.



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

3.5 Field Creation

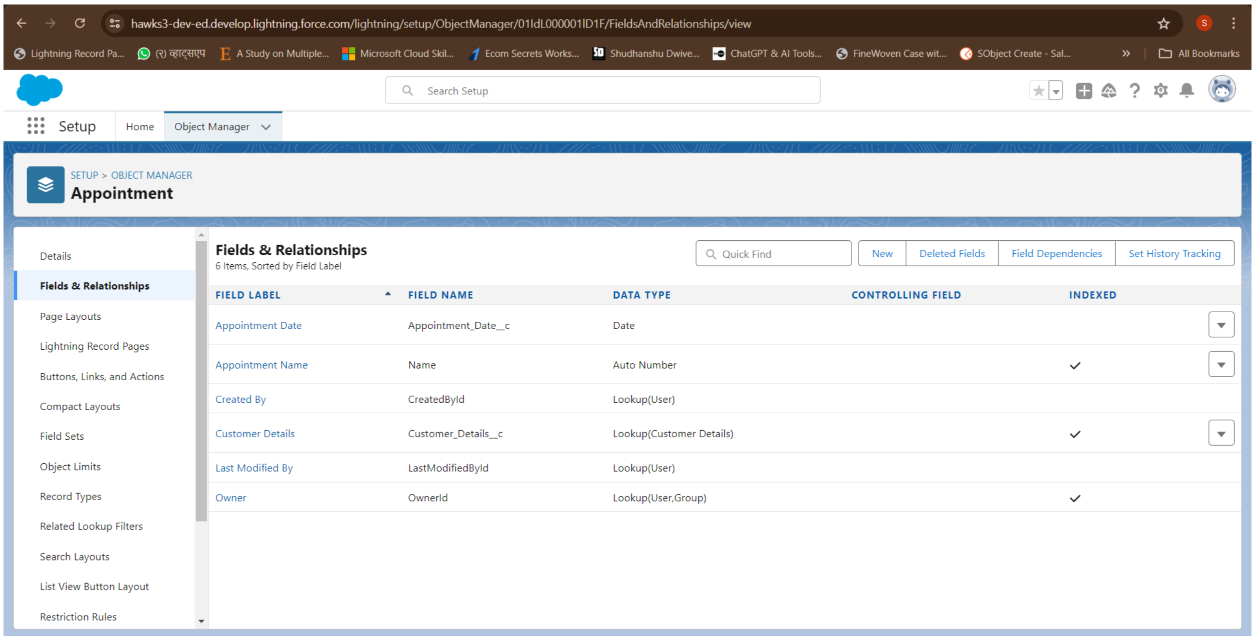
3.5.1 Creation of Various Field Types

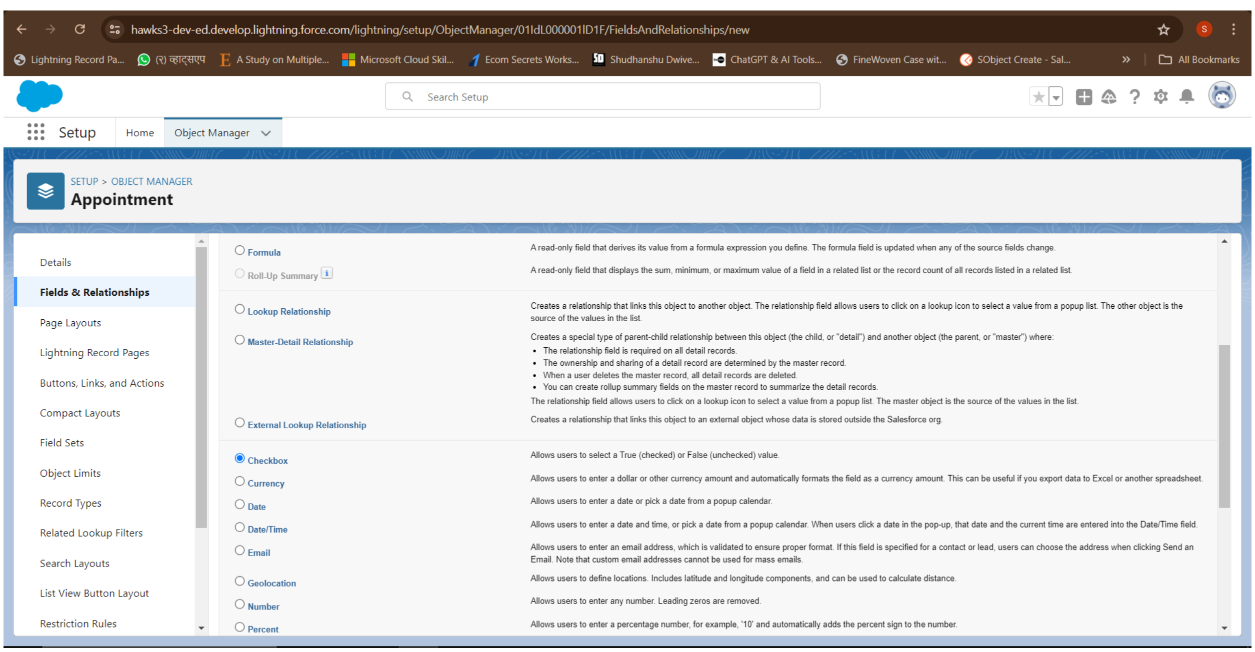
Task: Create different field types in the custom objects.

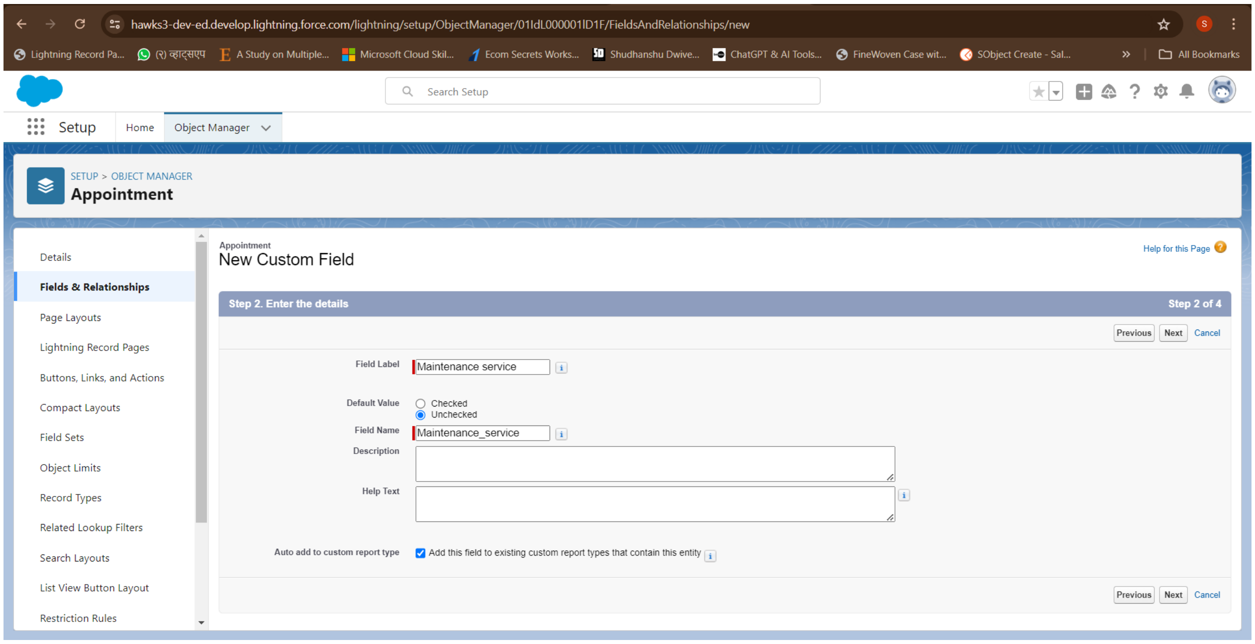
Process:

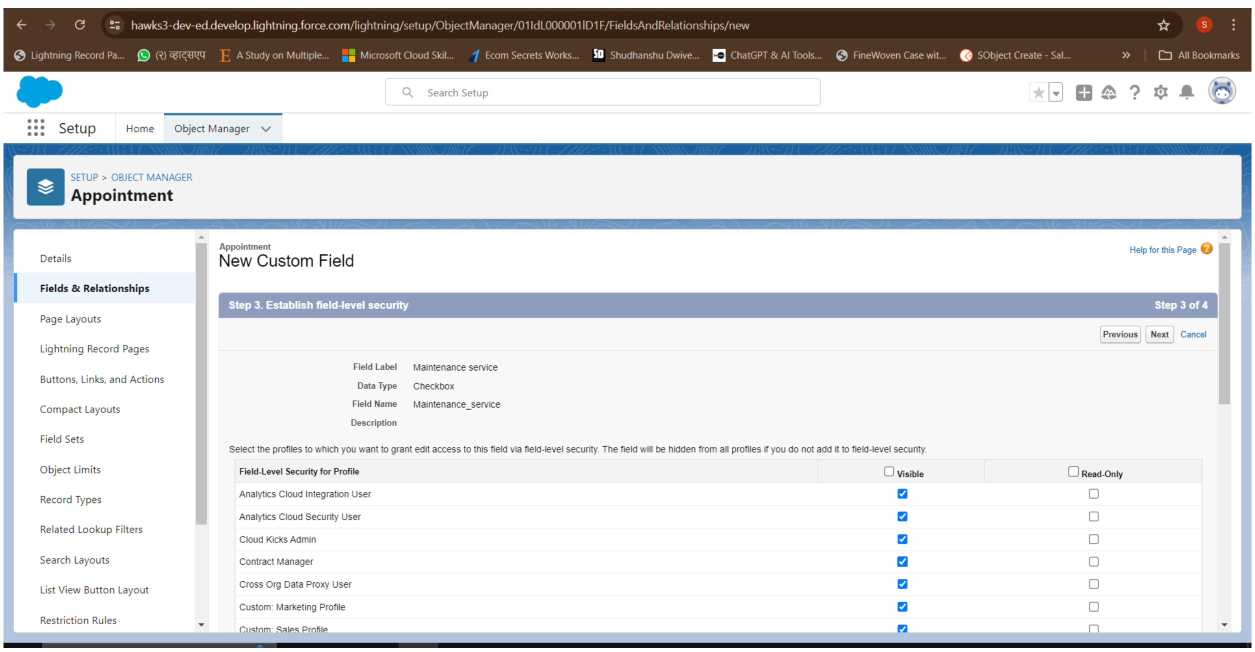
1. Go to **Setup** > **Object Manager** > Select an object (e.g., Customer Details).

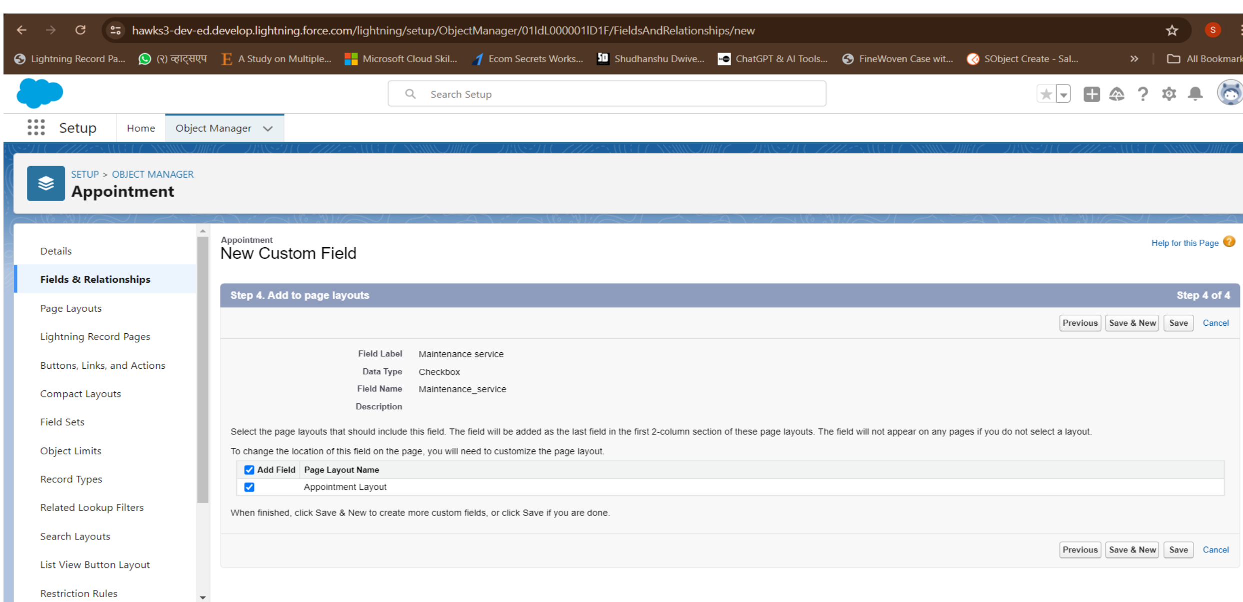
For Appointment



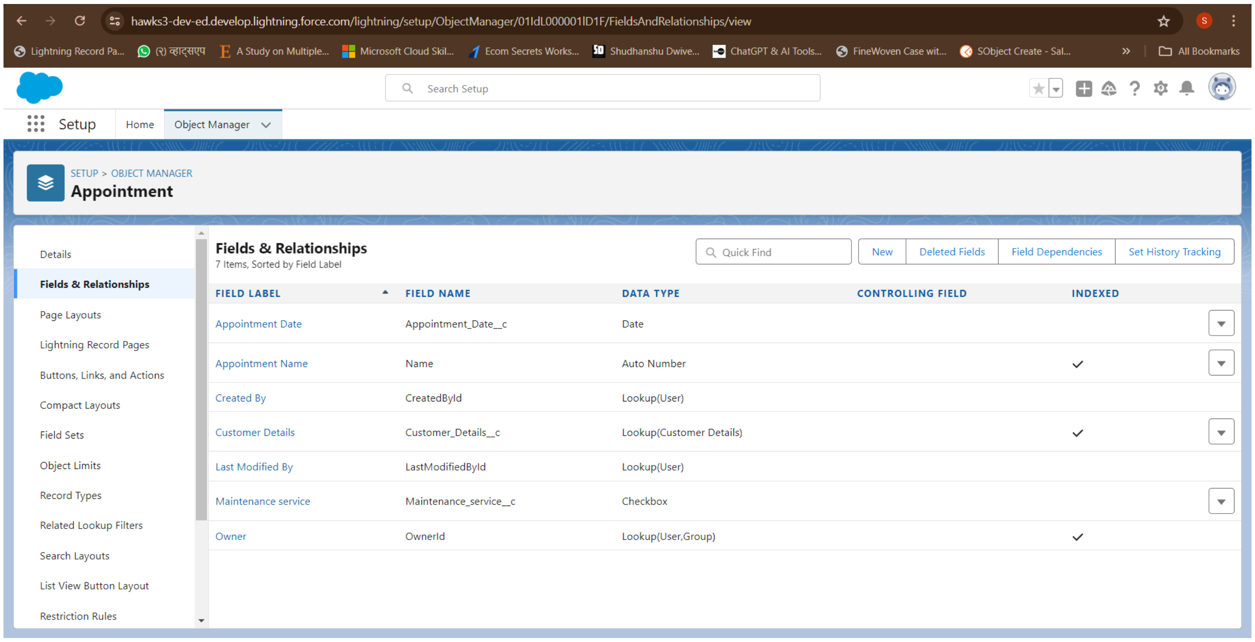



hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001ID1F/FieldsAndRelationships/new
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Appointment
New Custom Field
Help for this Page
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
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

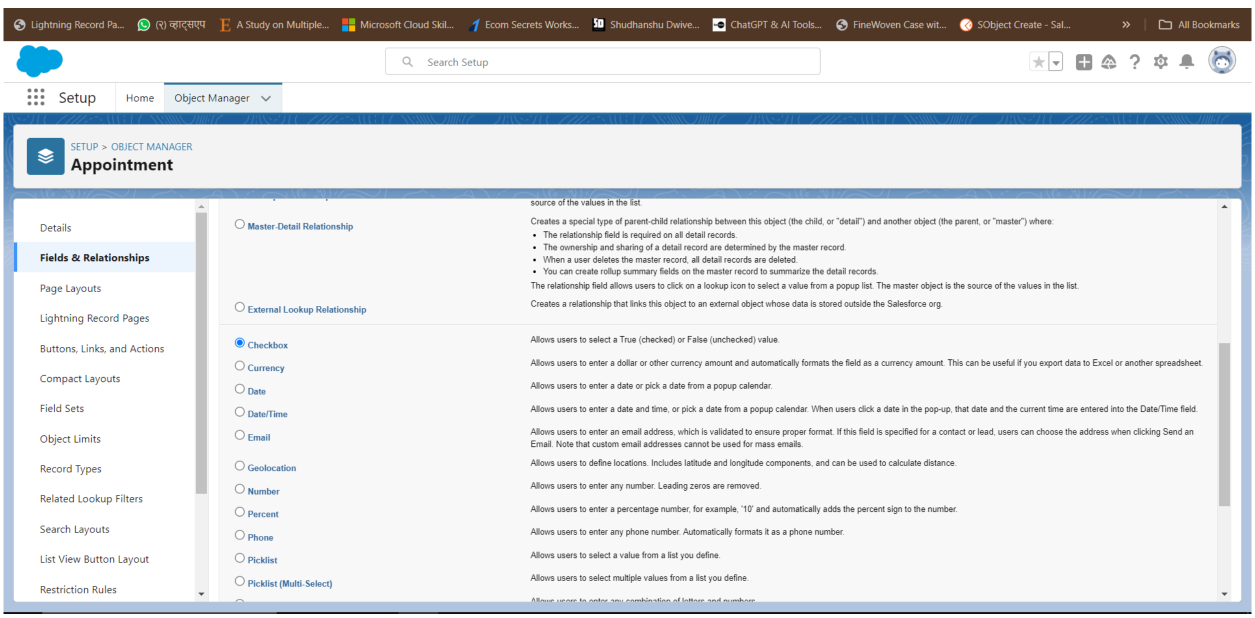

hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001ID1F/FieldsAndRelationships/new
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Appointment
New Custom Field
Help for this Page
Step 3. Establish field-level security
Step 3 of 4
Previous
Next
Cancel
Field Label
Maintenance service
Data Type
Checkbox
Field Name
Maintenance_service
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
Analytics Cloud Security User
Cloud Kicks Admin
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile


hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001ID1F/FieldsAndRelationships/new
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Appointment
New Custom Field
Help for this Page
Step 4. Add to page layouts
Step 4 of 4
Previous
Save & New
Save
Cancel
Field Label
Maintenance service
Data Type
Checkbox
Field Name
Maintenance_service
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.

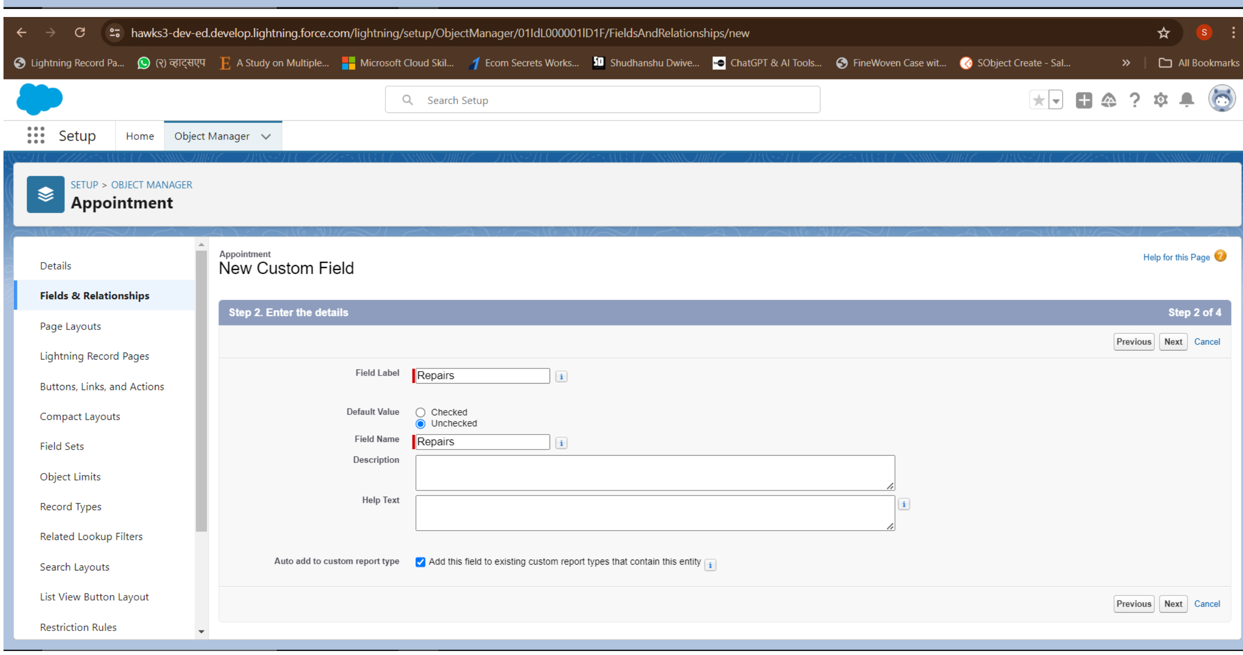
7



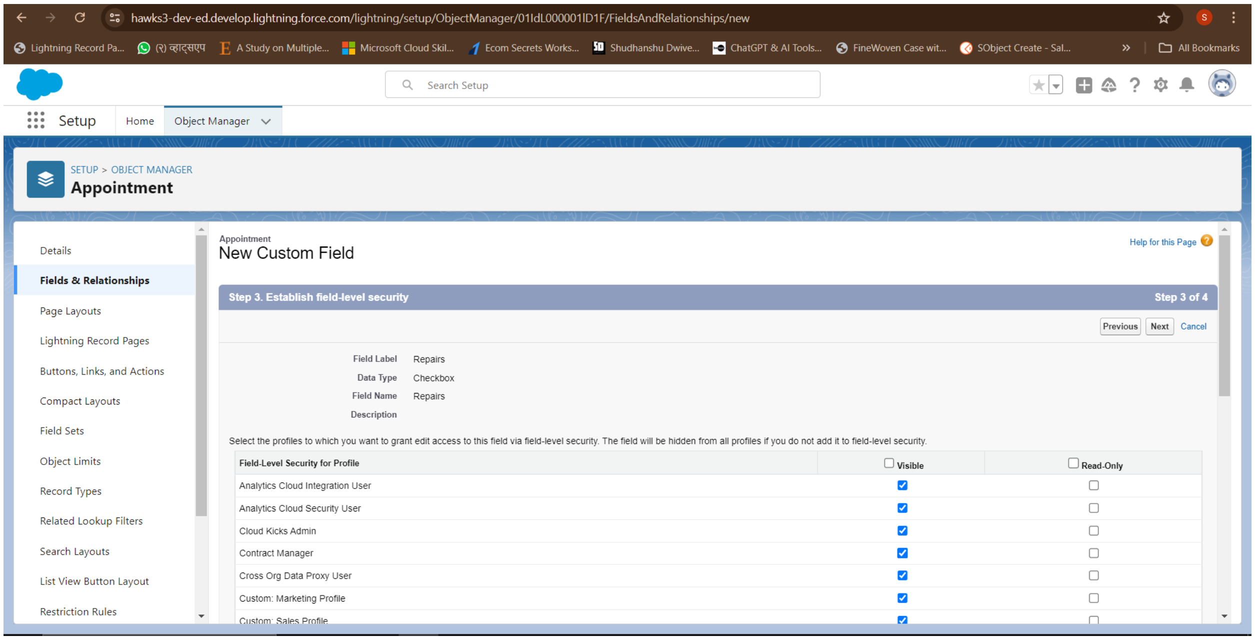
hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001lD1F/FieldsAndRelationships/view
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Fields & Relationships
7 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
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)

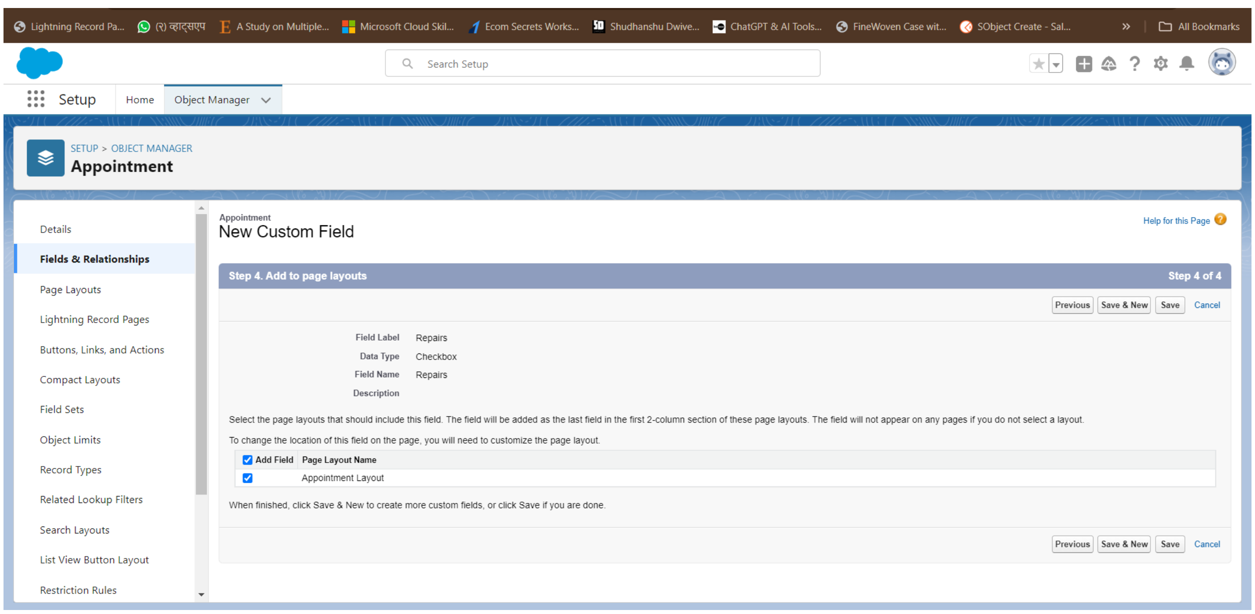


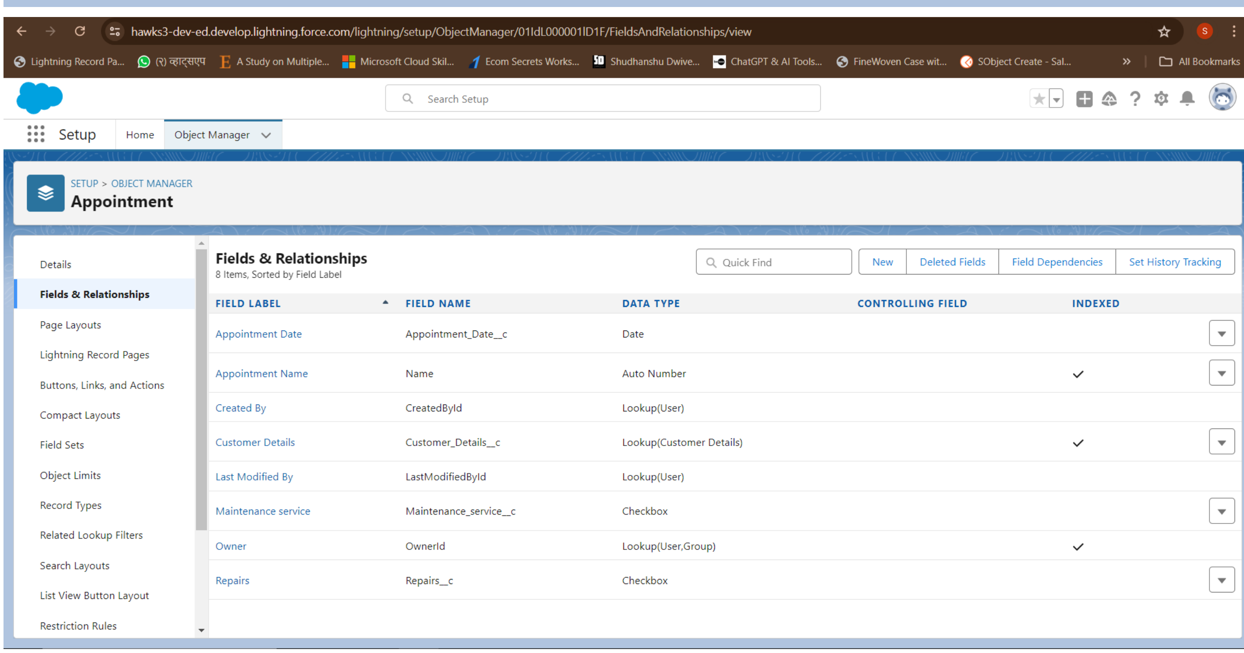
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
source of the 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.
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.
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.

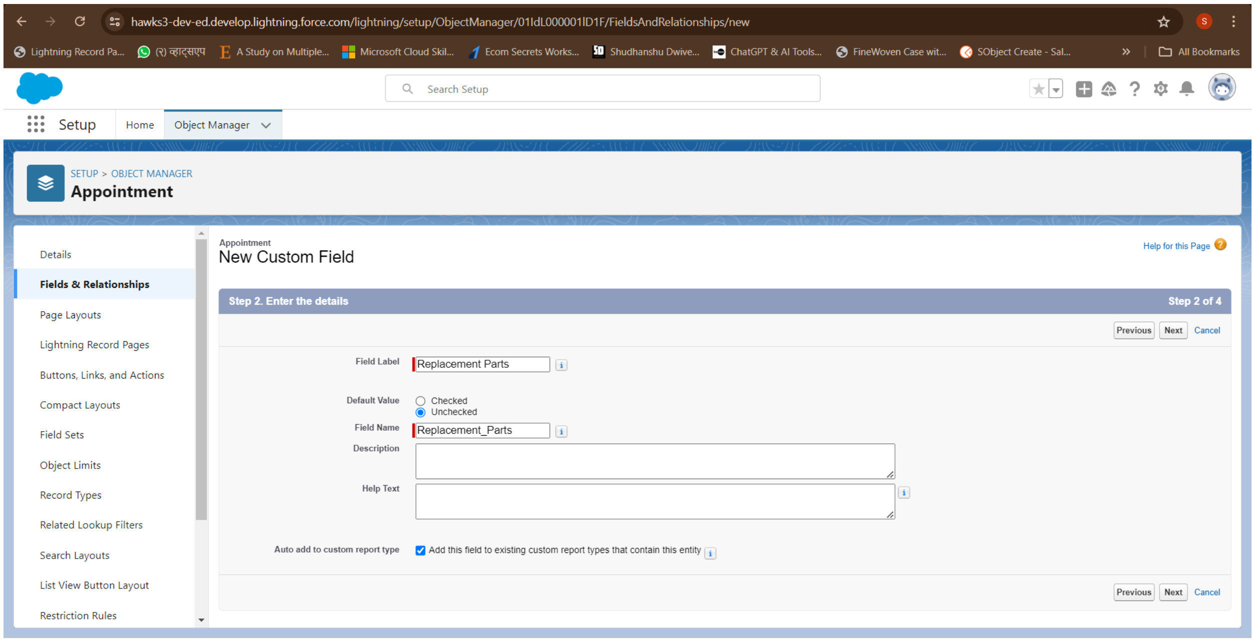


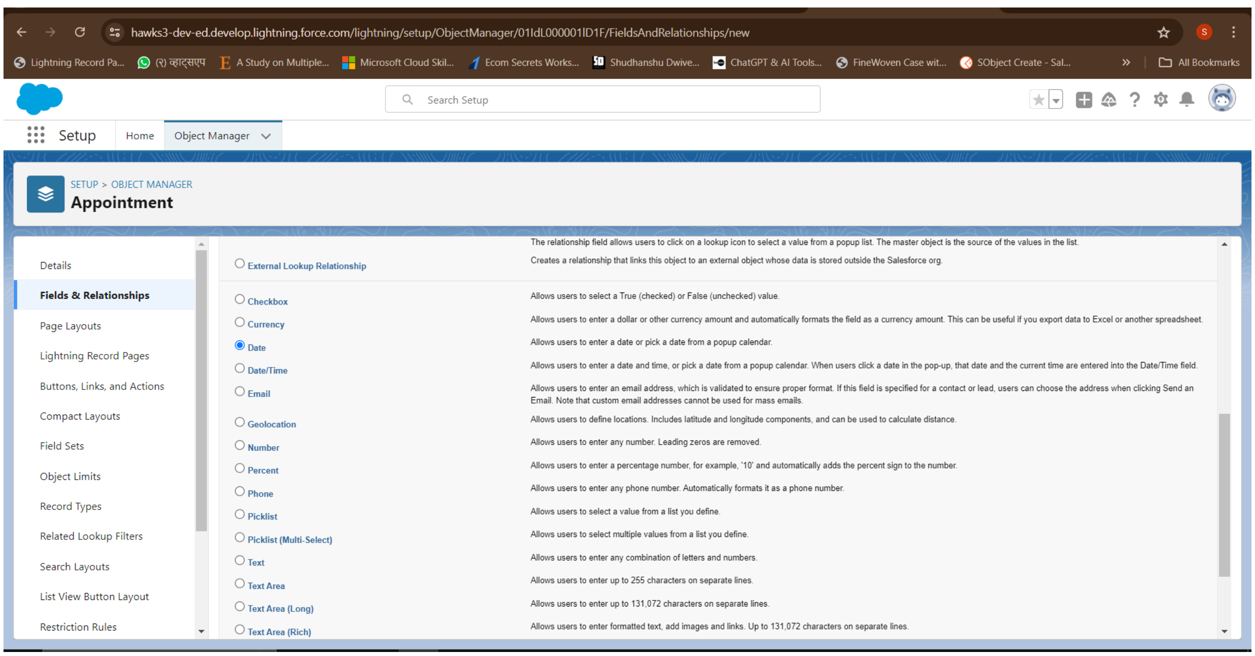
hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001lD1F/FieldsAndRelationships/new
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Appointment
New Custom Field
Help for this Page
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
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

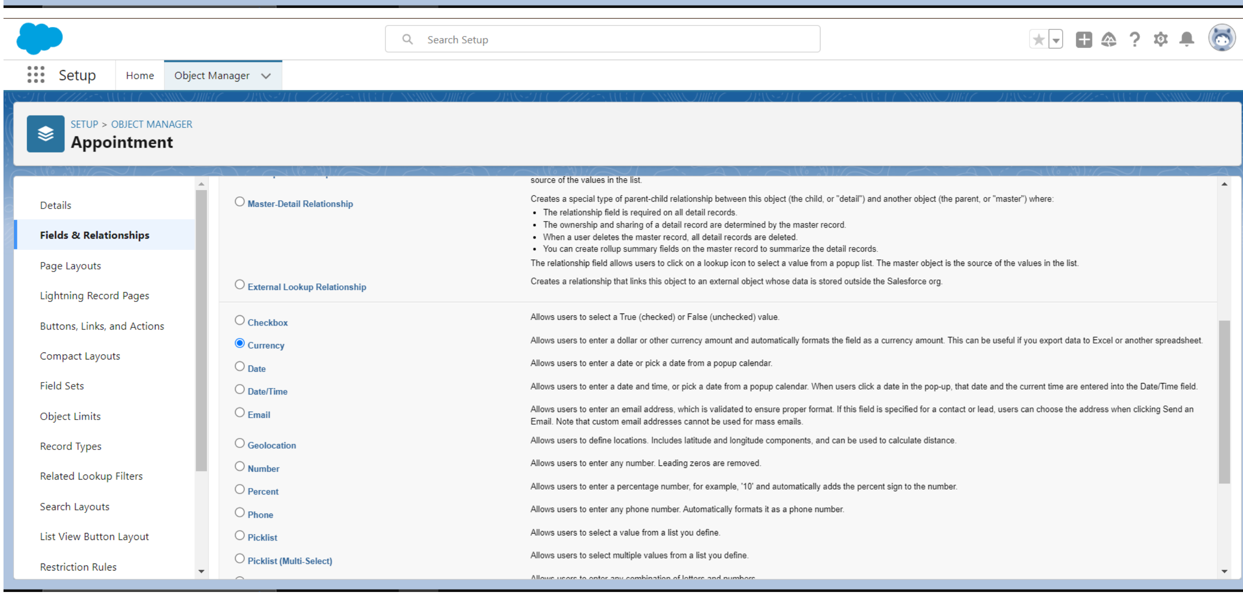

hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001ID1F/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Appointment
New Custom Field
Help for this Page
Step 3. Establish field-level security
Step 3 of 4
Previous
Next
Cancel
Field Label Repairs
Data Type Checkbox
Field Name Repairs
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
Analytics Cloud Security User
Cloud Kicks Admin
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile


Search Setup
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
Appointment
New Custom Field
Help for this Page
Step 4. Add to page layouts
Step 4 of 4
Previous
Save & New
Save
Cancel
Field Label Repairs
Data Type Checkbox
Field Name Repairs
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.


hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001ID1F/FieldsAndRelationships/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Fields & Relationships
8 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
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


hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001lD1F/FieldsAndRelationships/new
Search Setup
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
Appointment
New Custom Field
Help for this Page
Step 2. Enter the details
Step 2 of 4
Previous Next Cancel
Field Label Replacement Parts
Default Value Checked 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


hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001lD1F/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
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.
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.


Search Setup
Setup
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SETUP > OBJECT MANAGER
Appointment
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.
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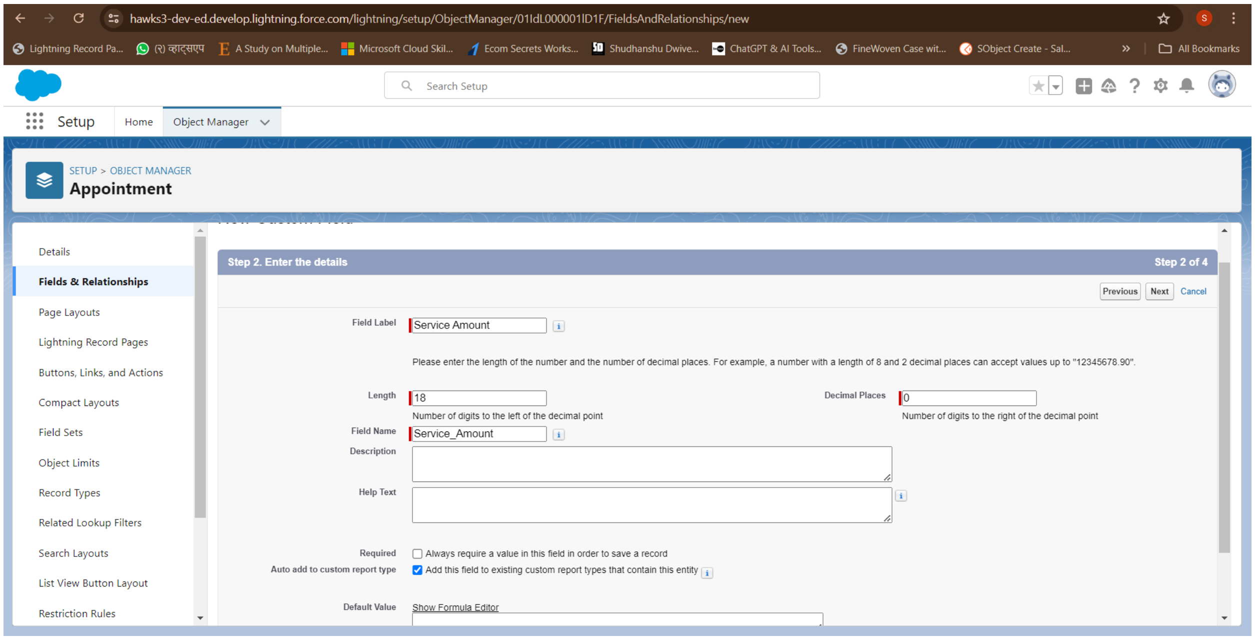
hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001ID1F/FieldsAndRelationships/new
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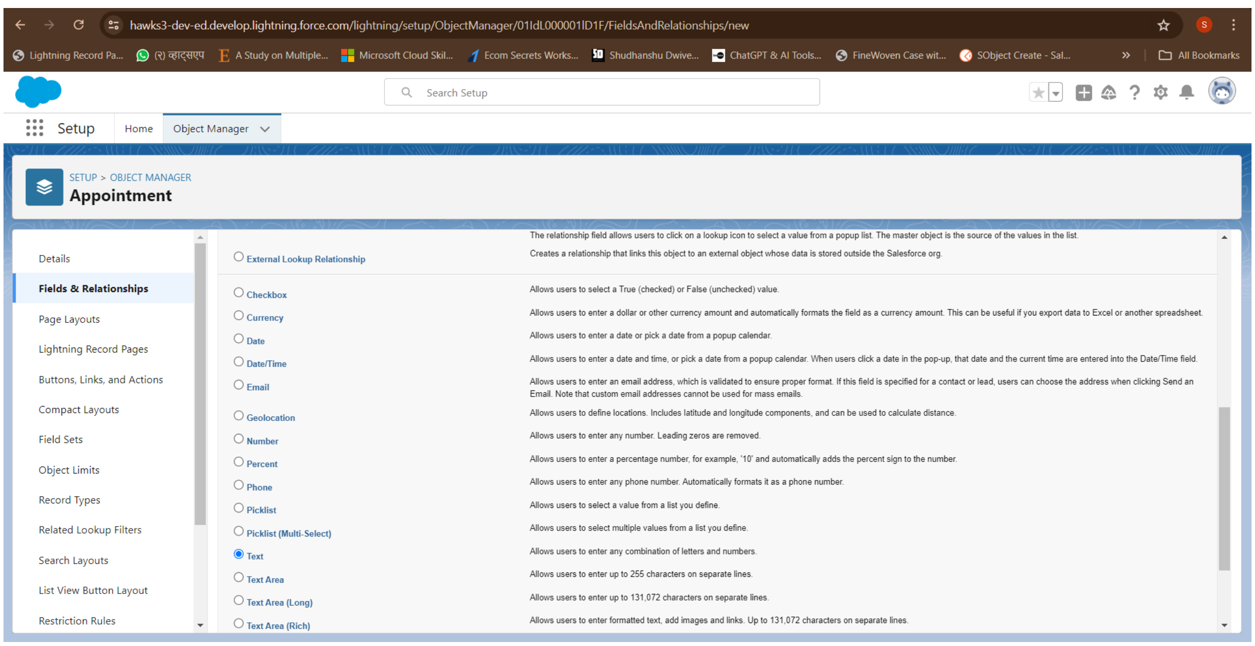
Search Layouts
List View Button Layout
Restriction Rules
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
Service Amount
Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".
Length
18
Number of digits to the left of the decimal point
Decimal Places
0
Number of digits to the right of the decimal point
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

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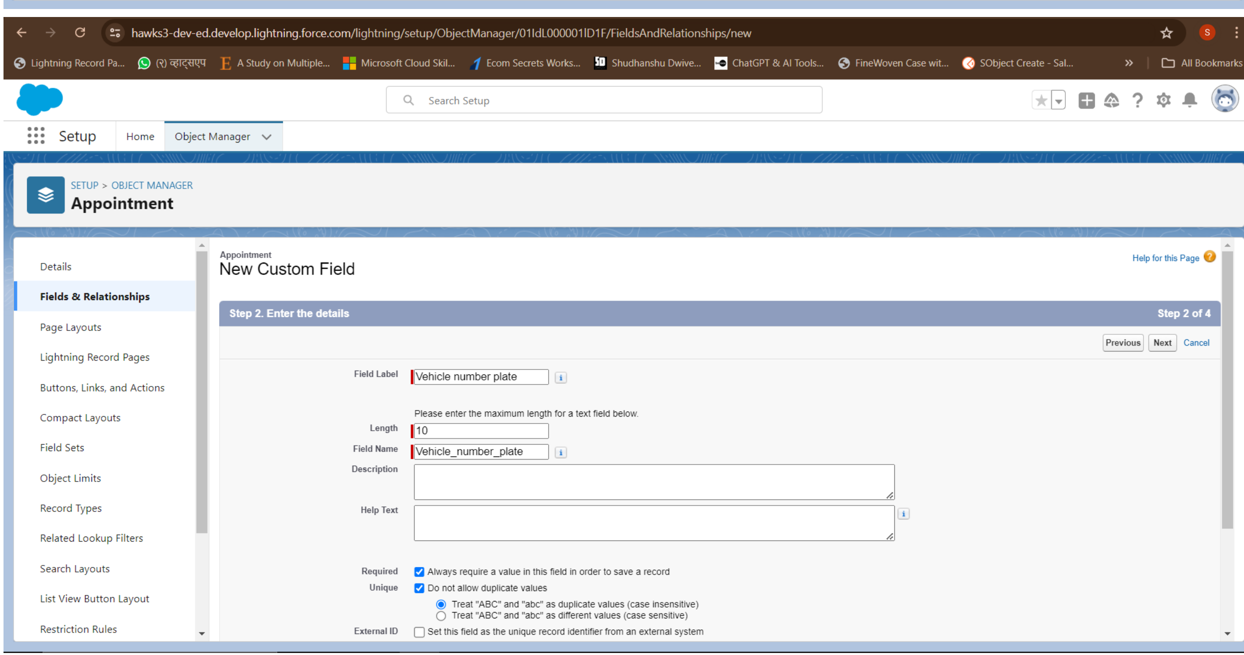
hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001ID1F/FieldsAndRelationships/new
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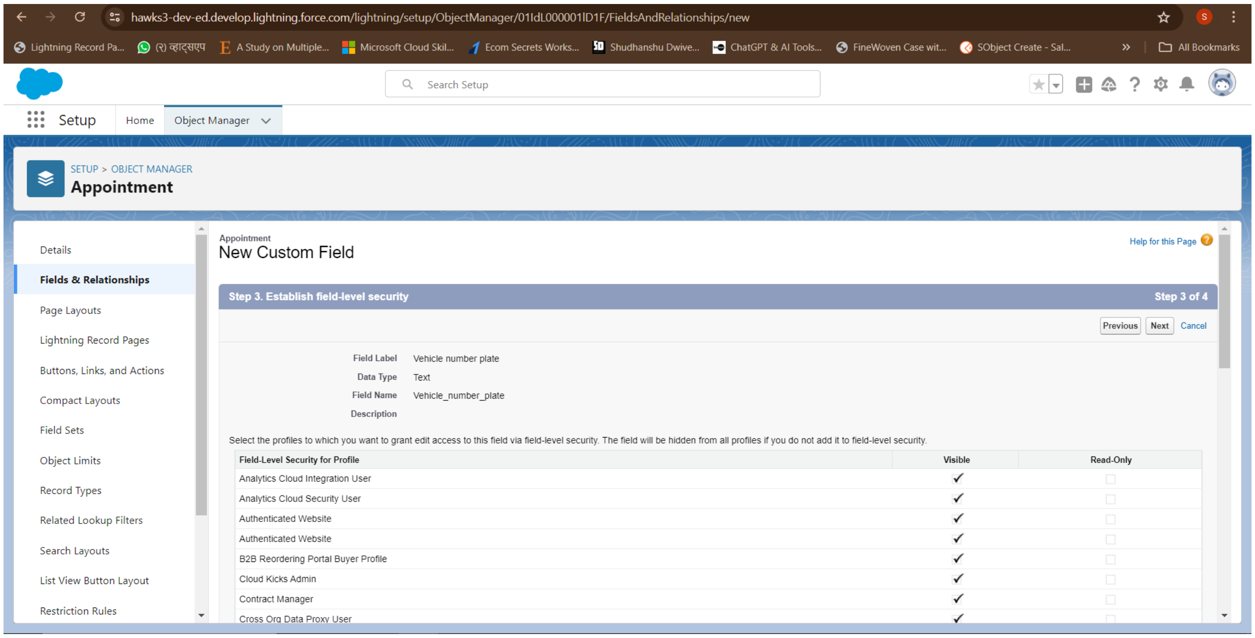
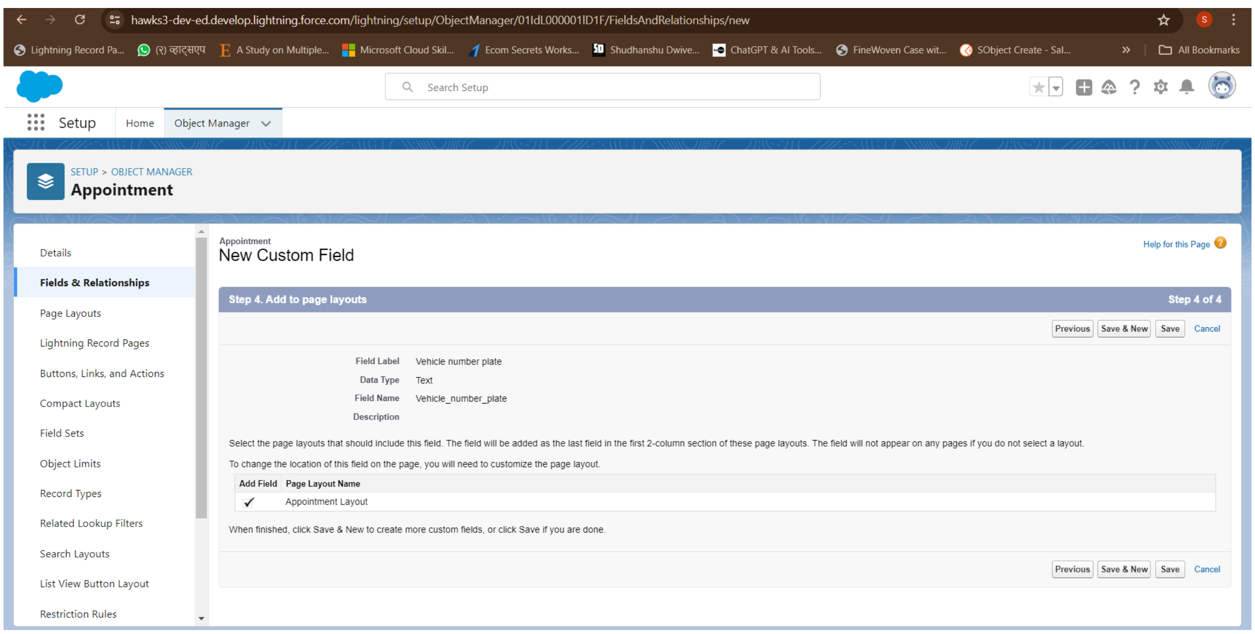
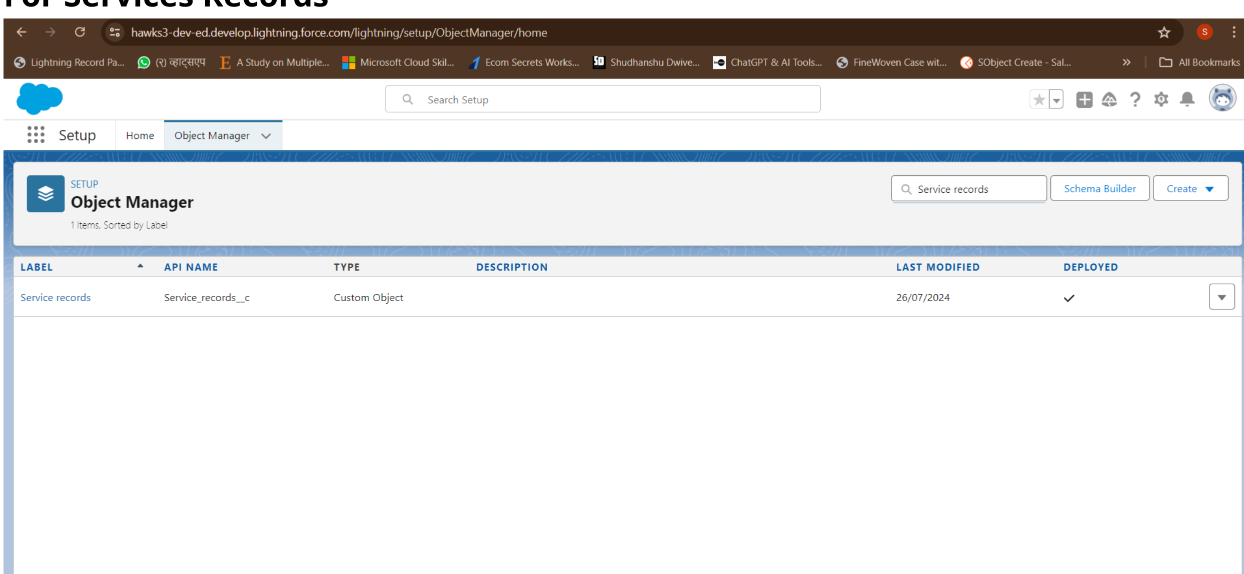
Appointment
New Custom Field
Help for this Page
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
Vehicle number plate
Please enter the maximum length for a text field below.
Length
10
Field Name
Vehicle_number_plate
Description
Help Text
Required
Always require a value in this field 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)
External ID
Set this field as the unique record identifier from an external system

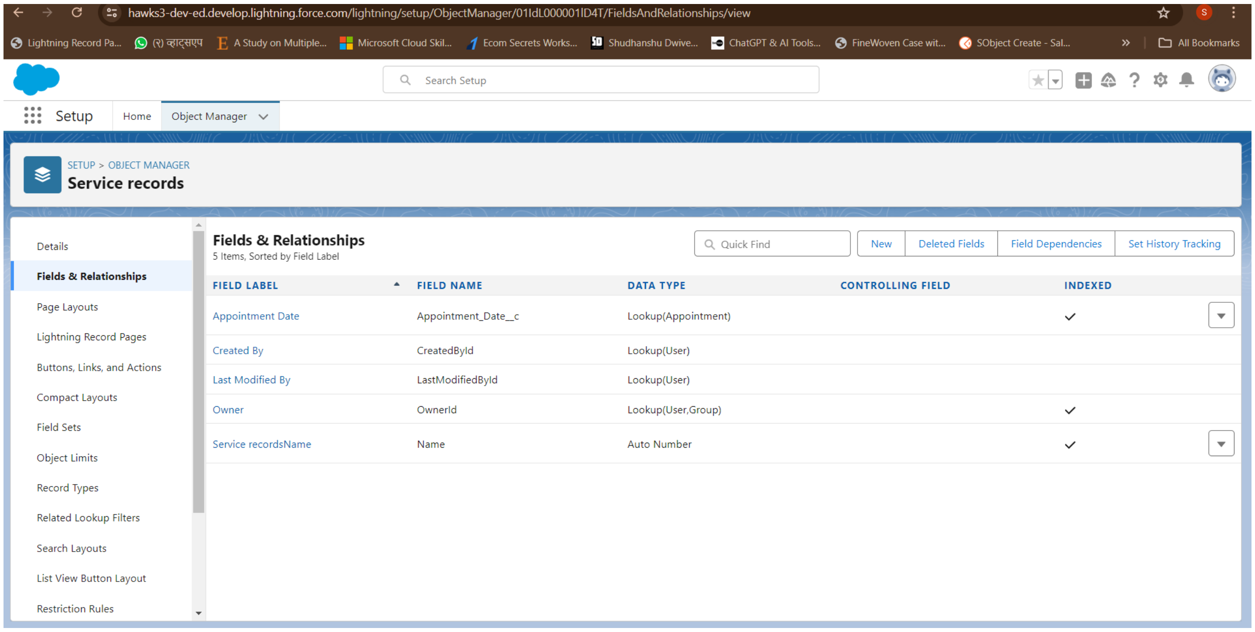
1





For Services Records




hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001ID4T/FieldsAndRelationships/view
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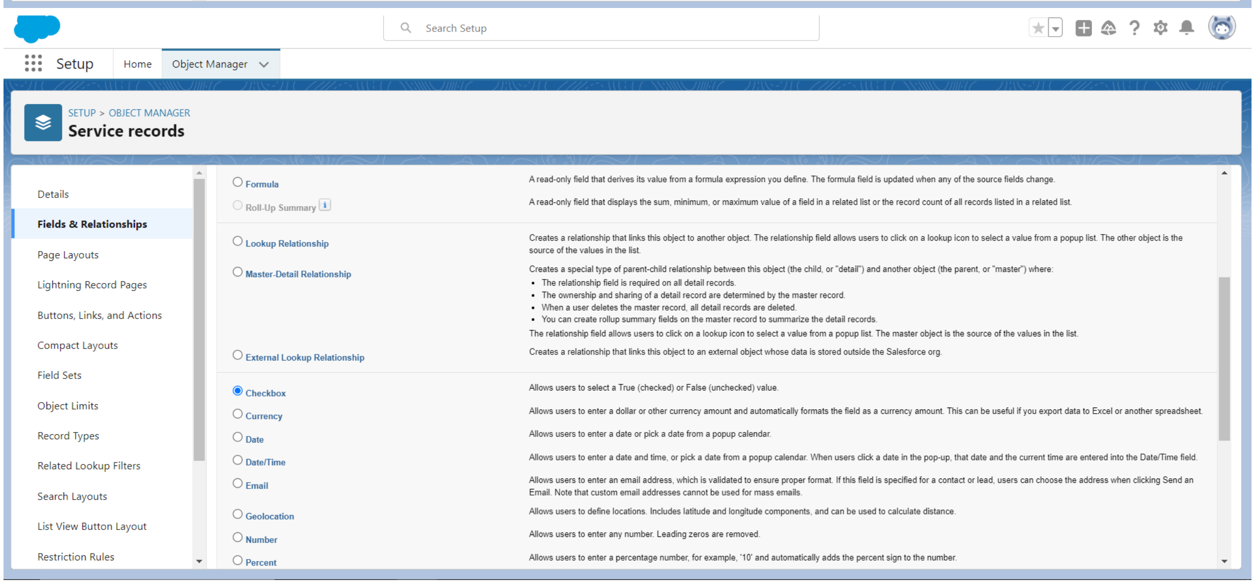
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Appointment Date
Appointment_Date__c
Lookup(Appointment)
Created By
CreatedById
Lookup(User)
Last Modified By
LastModifiedById
Lookup(User)
Owner
OwnerId
Lookup(User,Group)
Service recordsName
Name
Auto Number


Search Setup
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Restriction Rules
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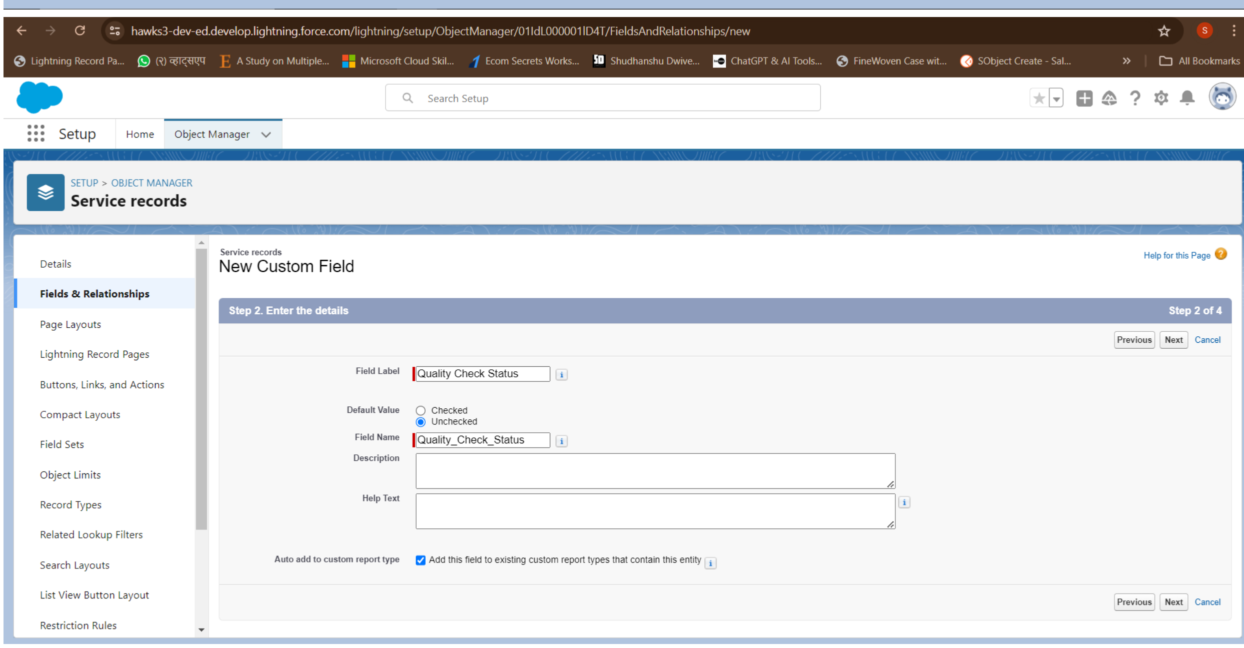
hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001ID4T/FieldsAndRelationships/new
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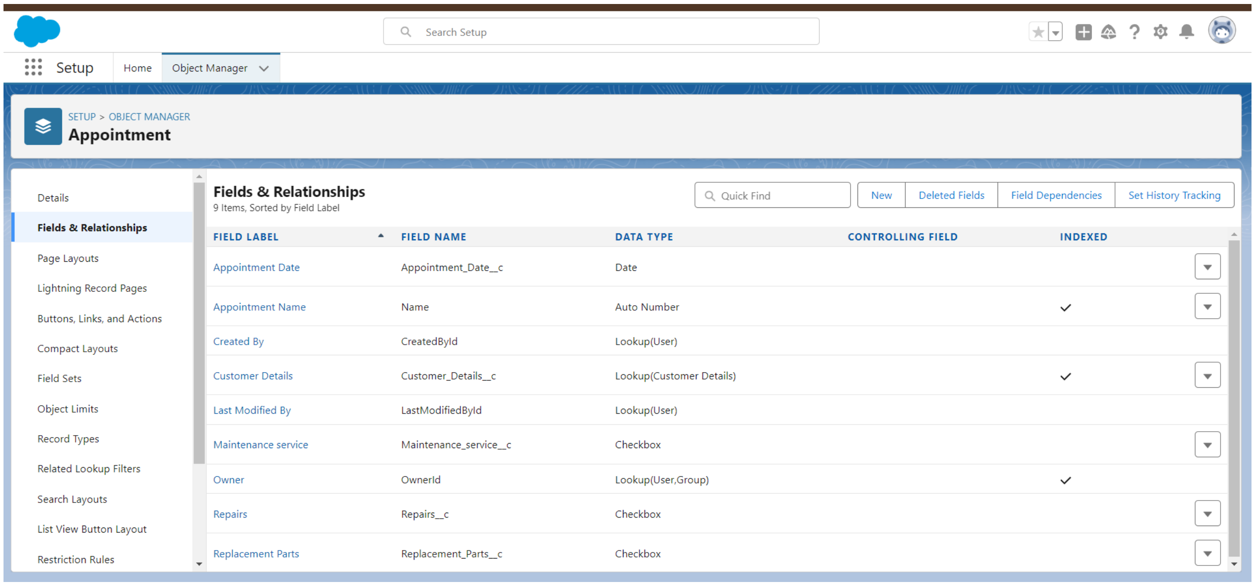
Next
Cancel
Field Label
Quality Check Status
Default Value
Checked
Unchecked
Field Name
Quality_Check_Status
Description
Help Text
Auto add to custom report type
Add this field to existing custom report types that contain this entity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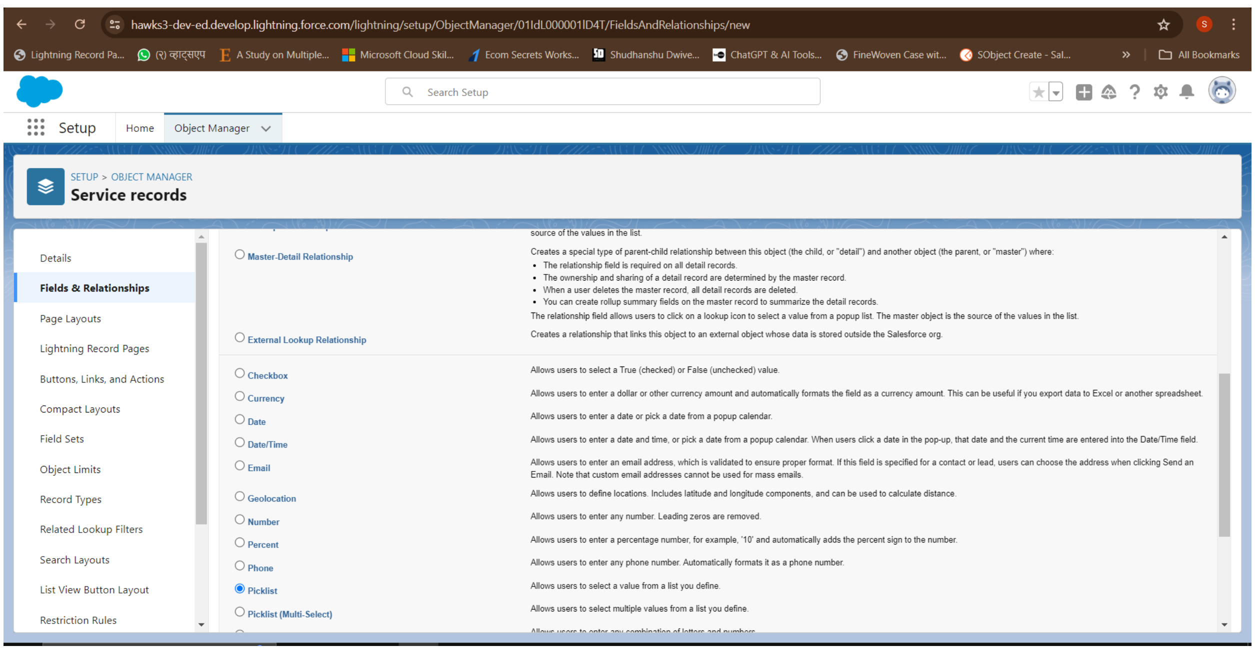
INDEXED
Appointment Date
Appointment_Date__c
Date
Appointment Name
Name
Auto Number
Created By
CreatedById
Lookup(User)
Customer Details
Customer_Details__c
Lookup(Customer Details)
Last Modified By
LastModifiedById
Lookup(User)
Maintenance service
Maintenance_service__c
Checkbox
Owner
OwnerId
Lookup(User,Group)
Repairs
Repairs__c
Checkbox
Replacement Parts
Replacement_Parts__c
Checkbox


hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001lD4T/FieldsAndRelationships/new
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Master-Detail Relationship
External Lookup Relationship
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Email
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Number
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Phone
Picklist
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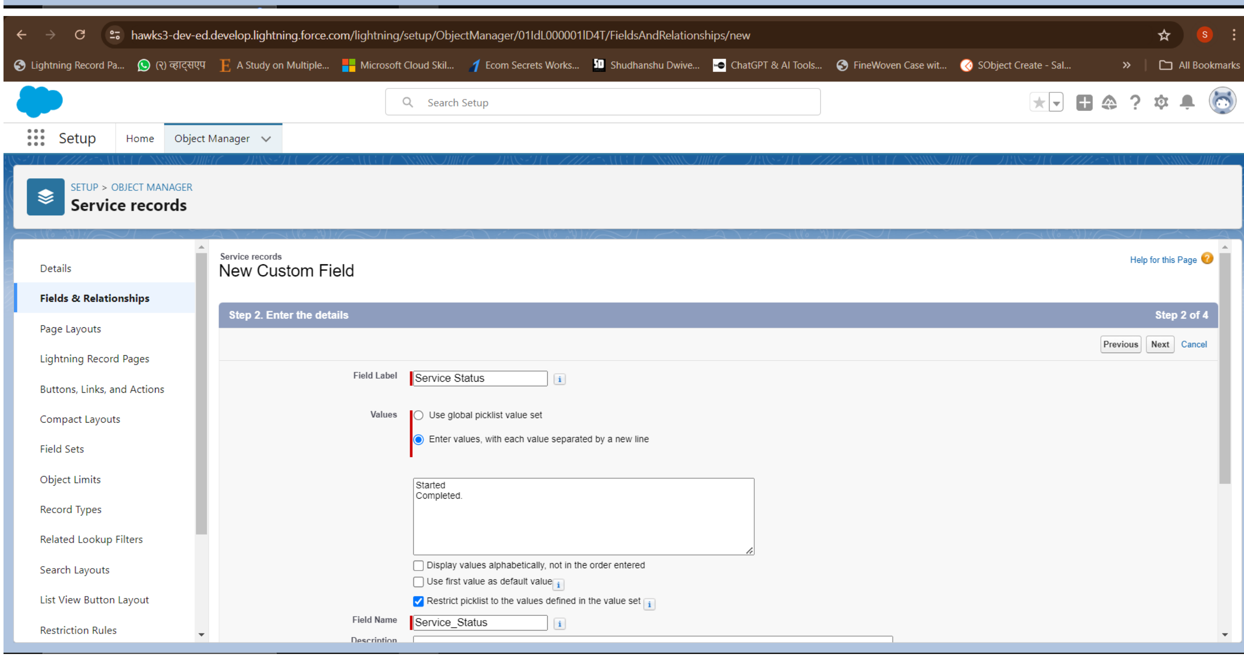
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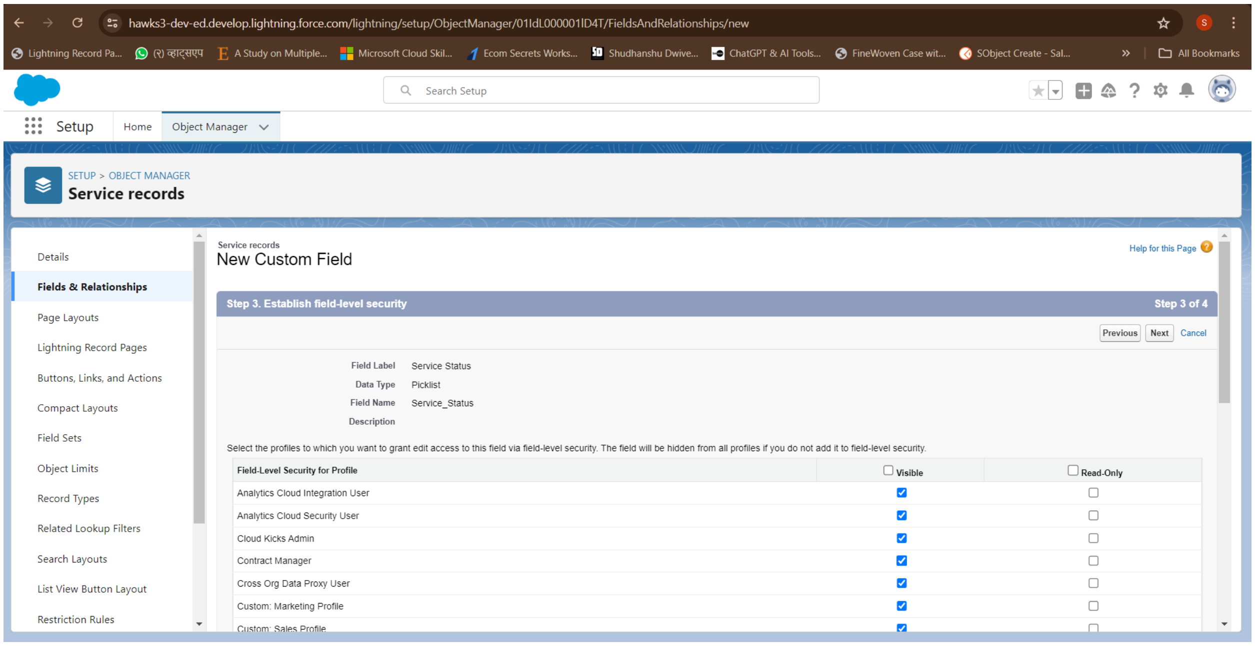
Previous
Next
Cancel
Field Label
Service Status
Values
Use global picklist value set
Enter values, with each value separated by a new line
Started
Completed.
Display values alphabetically, not in the order entered
Use first value as default value
Restrict picklist to the values defined in the value set
Field Name
Service_Status

4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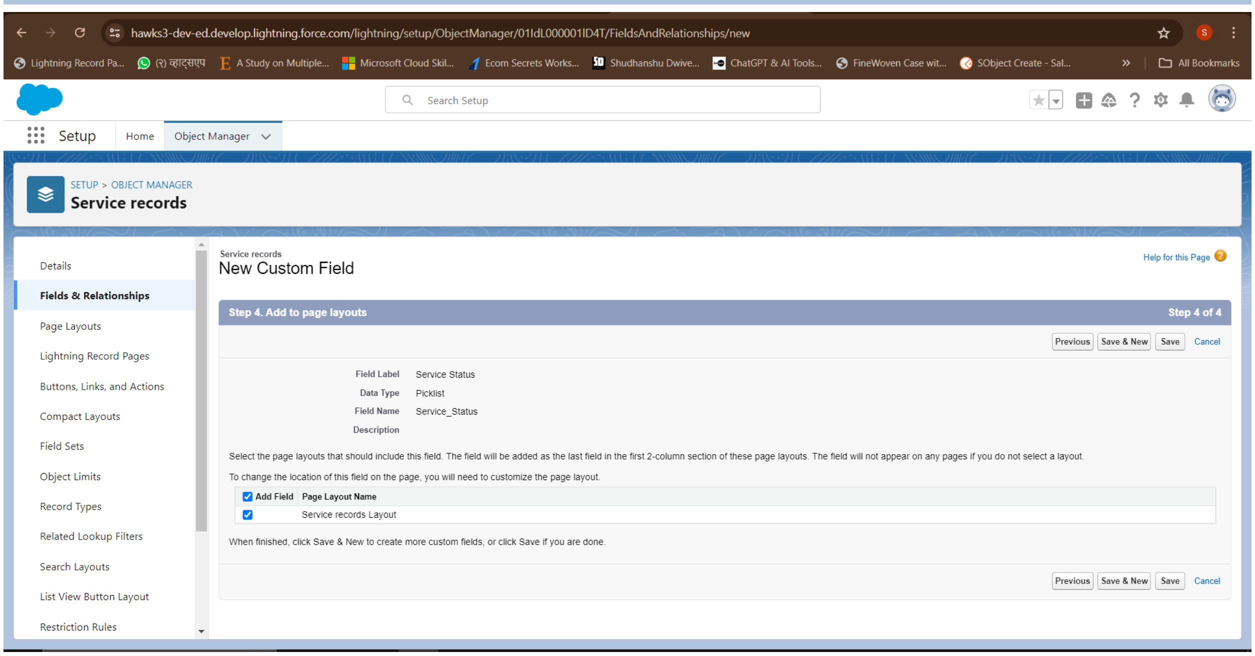
Step 3. Establish field-level security
Step 3 of 4
Previous
Next
Cancel
Field Label Service Status
Data Type Picklist
Field Name Service_Status
Description
Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.
Field-Level Security for Profile
Visible
Read-Only
Analytics Cloud Integration User
Analytics Cloud Security User
Cloud Kicks Admin
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile


hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001lD4T/FieldsAndRelationships/new
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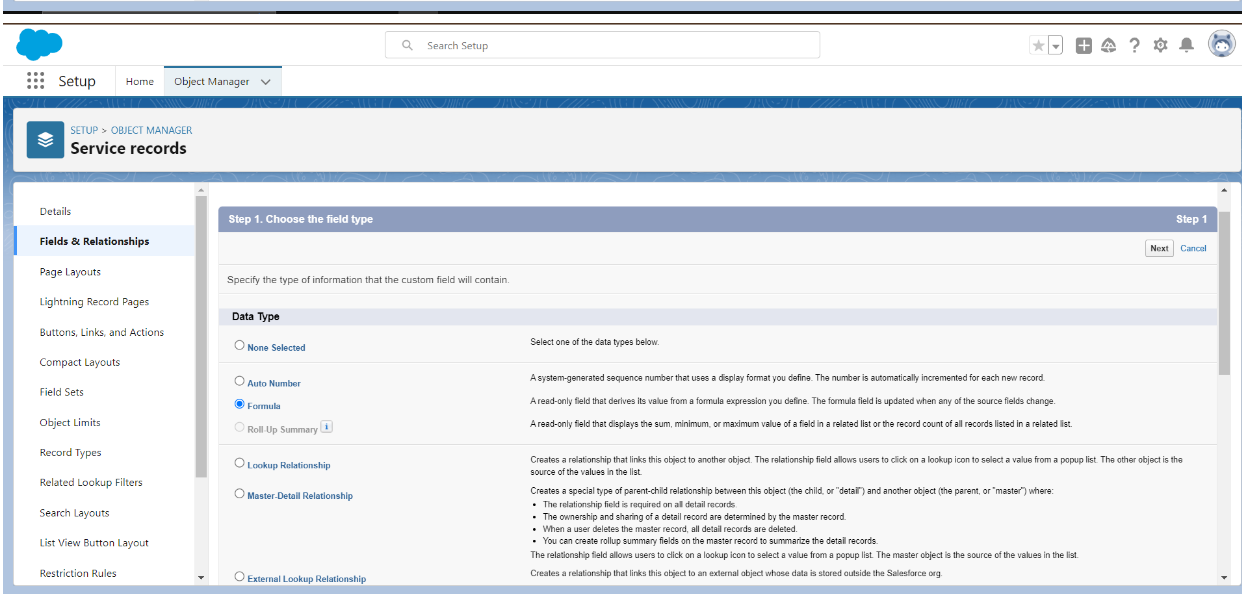
Step 4. Add to page layouts
Step 4 of 4
Previous
Save & New
Save
Cancel
Field Label Service Status
Data Type Picklist
Field Name Service_Status
Description
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. 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
Service records Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.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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.
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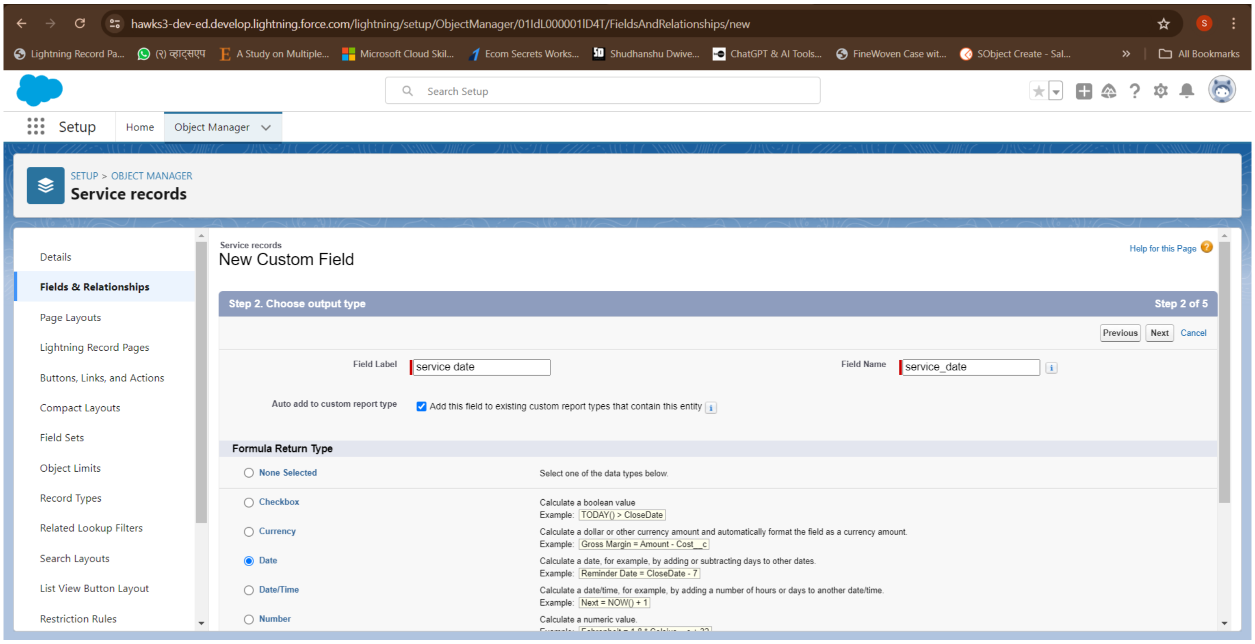
hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001ID4T/FieldsAndRelationships/new
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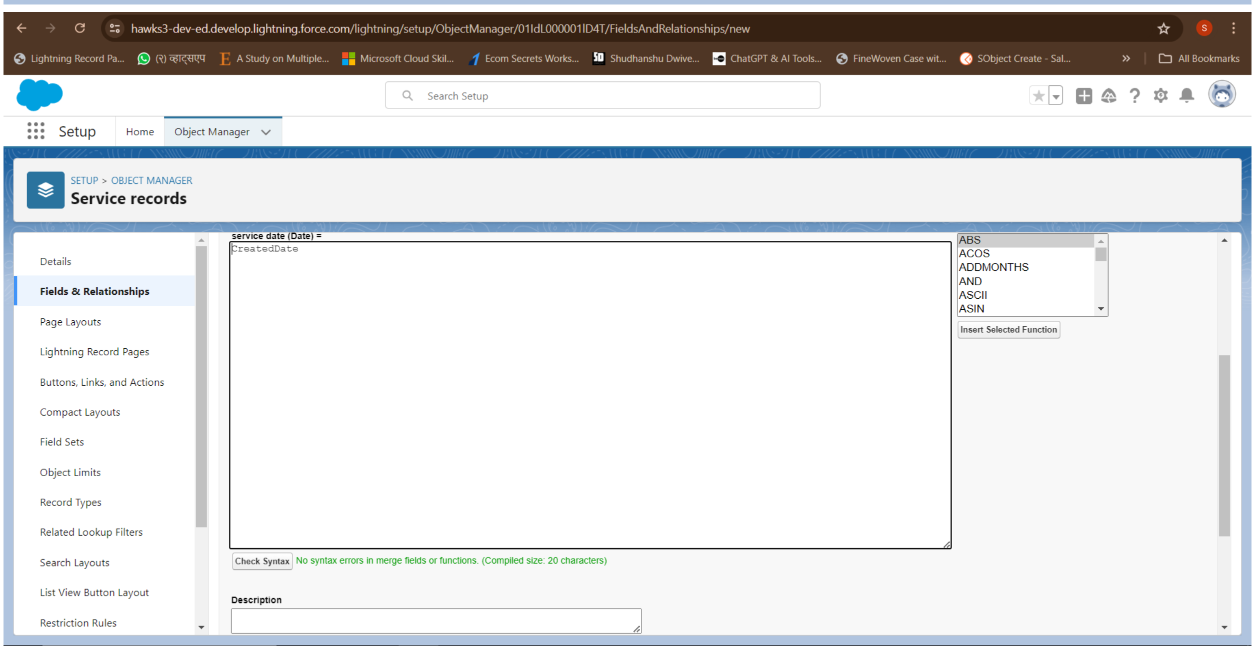
Step 2. Choose output type
Step 2 of 5
Previous
Next
Cancel
Field Label
service date
Field Name
service_date
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Formula Return Type
None Selected
Select one of the data types below.
Checkbox
Calculate a boolean value
Example: TODAY() > CloseDate
Currency
Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: Gross Margin = Amount - Cost__c
Date
Calculate a date, for example, by adding or subtracting days to other dates.
Example: Reminder Date = CloseDate - 7
Date/Time
Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: Next = NOW() + 1
Number
Calculate a numeric value.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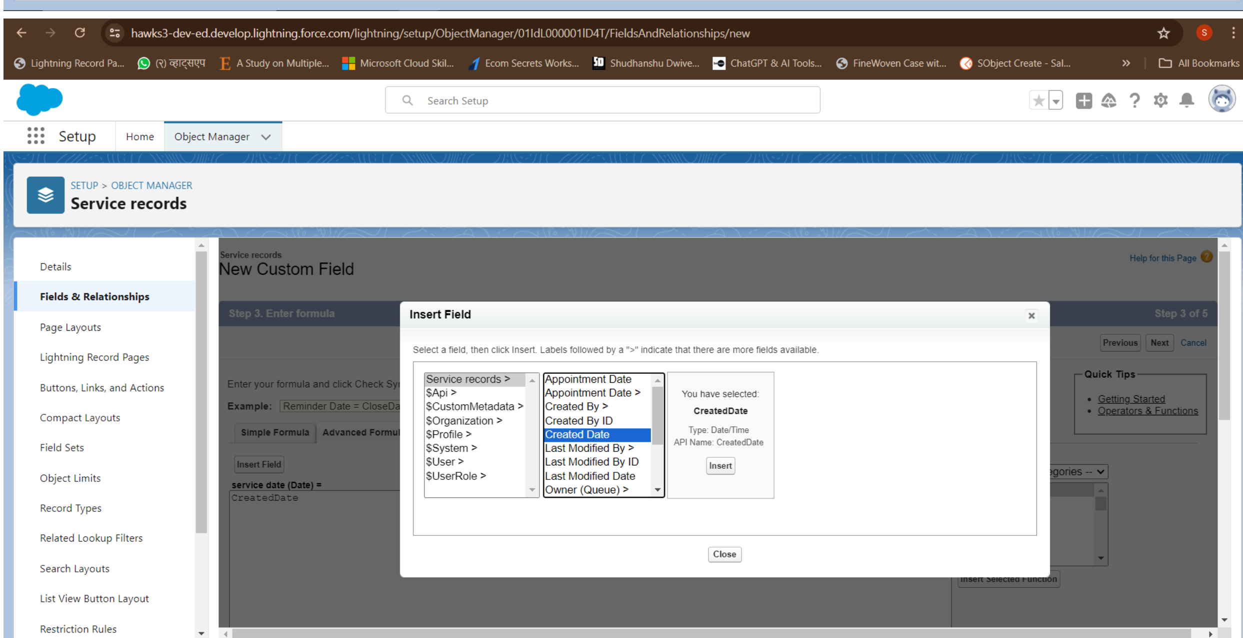
service date (Date) =
CreatedDate
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function
Check Syntax
No syntax errors in merge fields or functions. (Compiled size: 20 characters)
Description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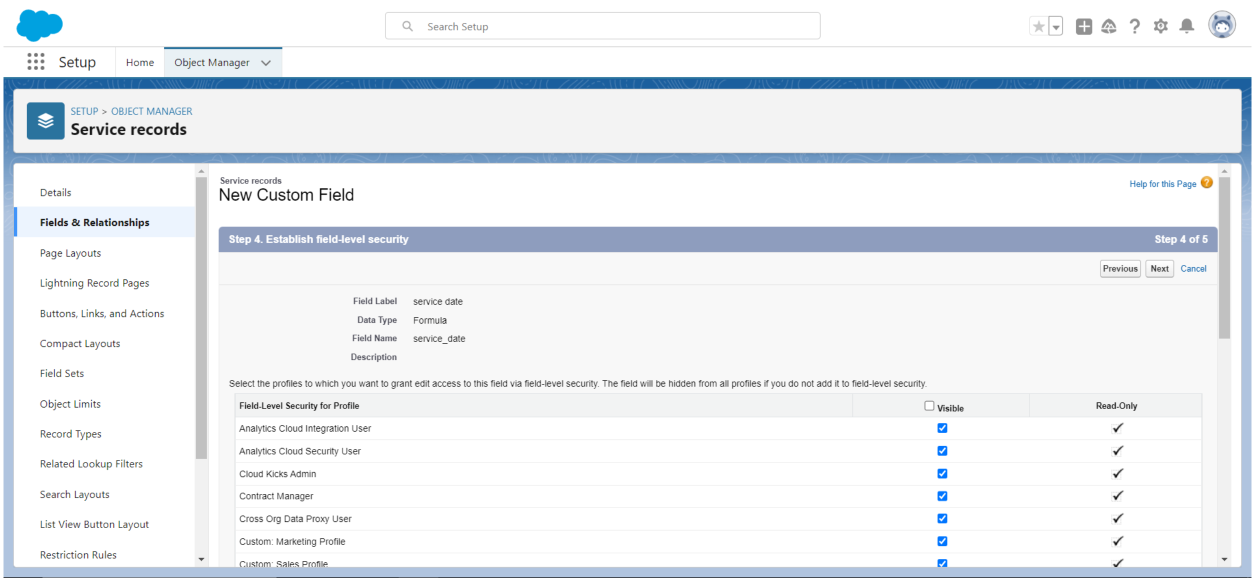
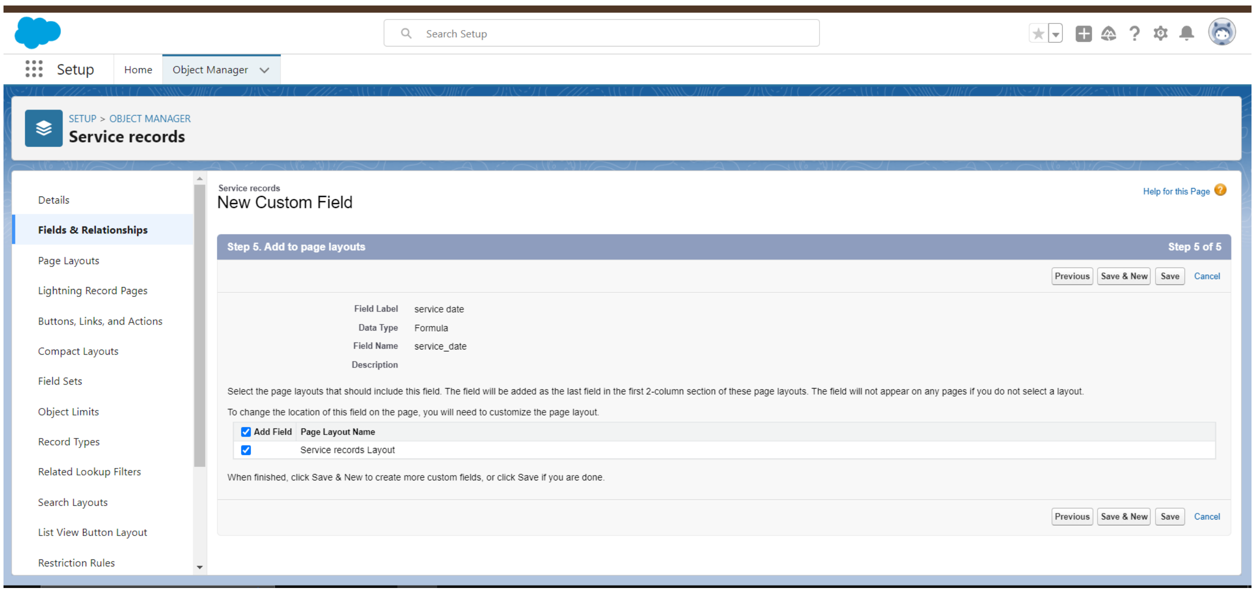
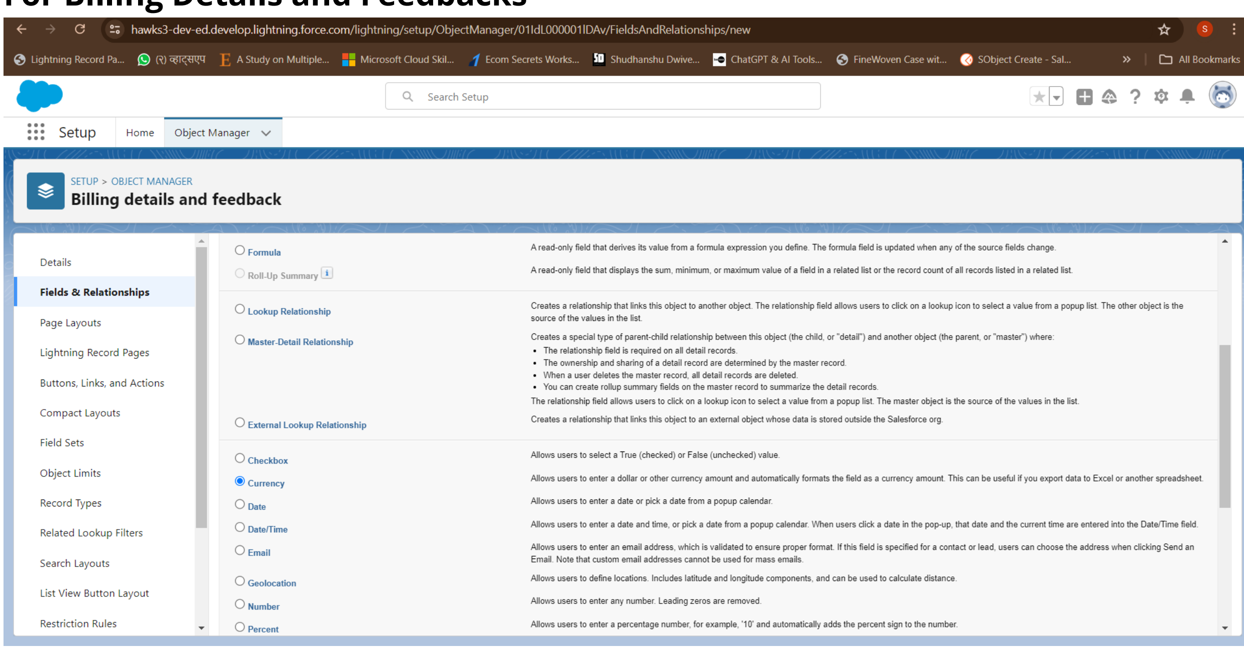
Service records
New Custom Field
Step 3. Enter formula
Step 3 of 5
Insert Field
Select a field, then click Insert. Labels followed by a ">" indicate that there are more fields available.
Service records >
$Api >
$CustomMetadata >
$Organization >
$Profile >
$System >
$User >
$UserRole >
Appointment Date
Appointment Date >
Created By >
Created By ID
Created Date
Last Modified By >
Last Modified By ID
Last Modified Date
Owner (Queue) >
You have selected:
CreatedDate
Type: Date/Time
API Name: CreatedDate
Insert
Close
Quick Tips
Getting Started
Operators & Functions
service date (Date) =
CreatedDate

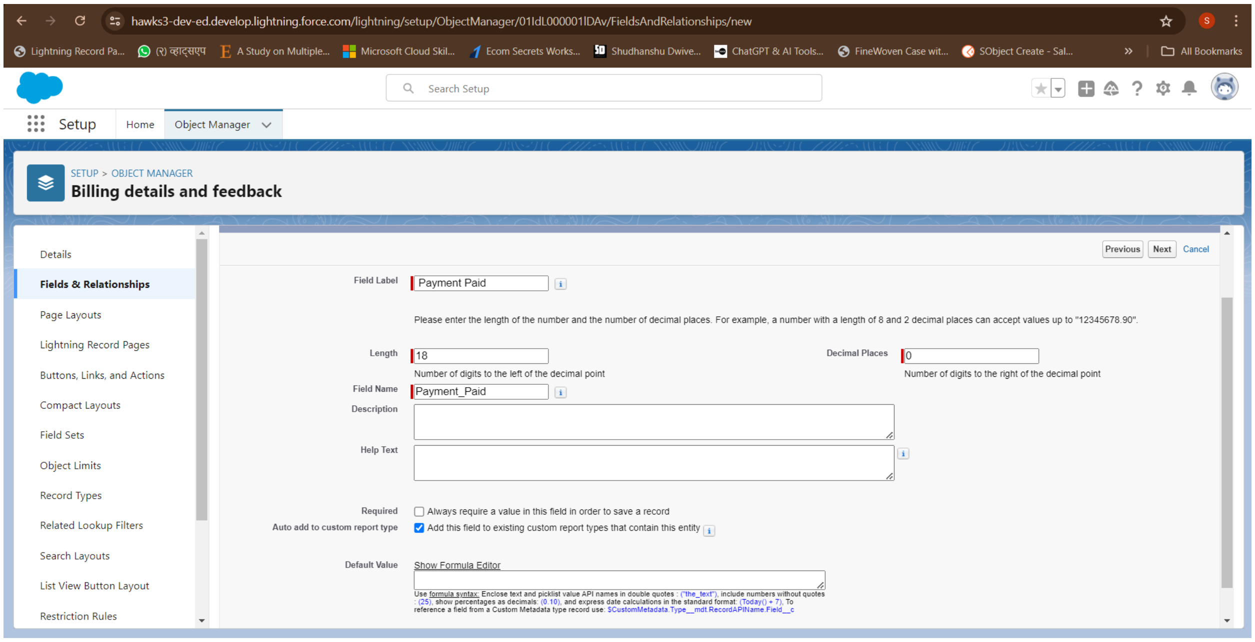
6

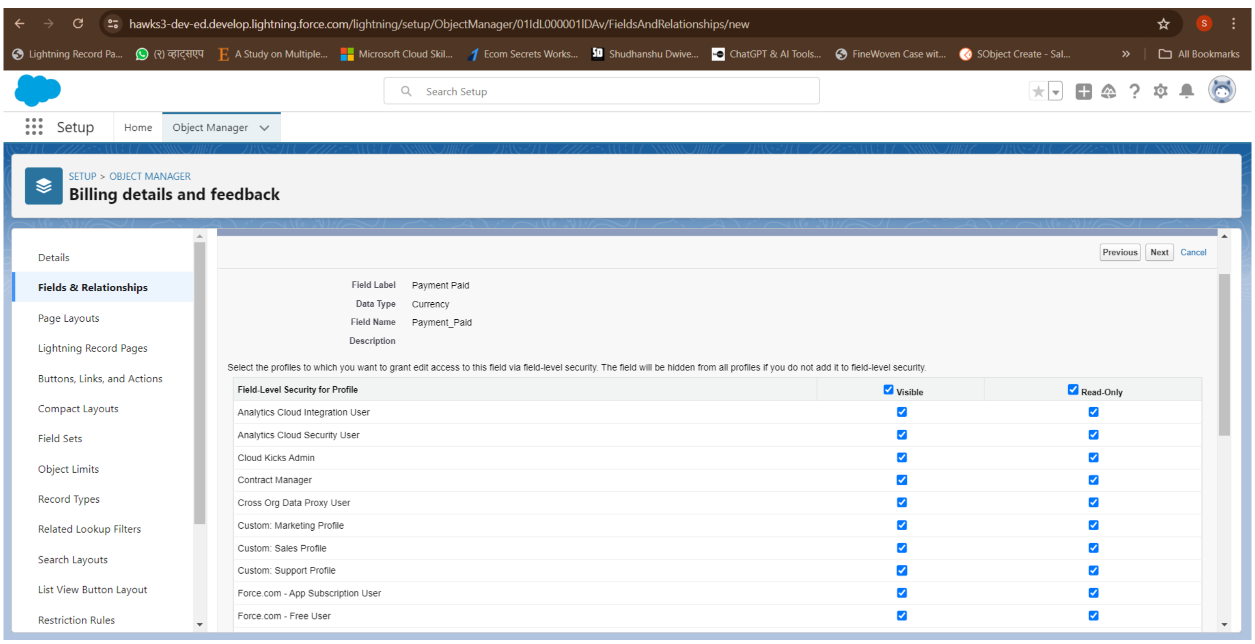


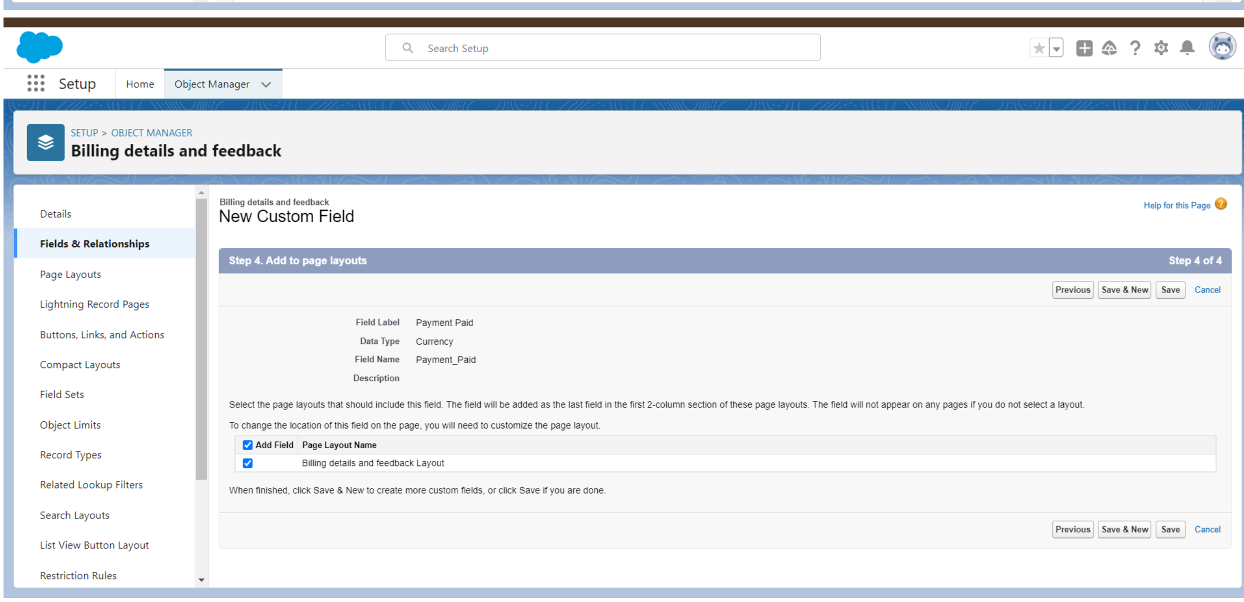


For Billing Details and Feedbacks

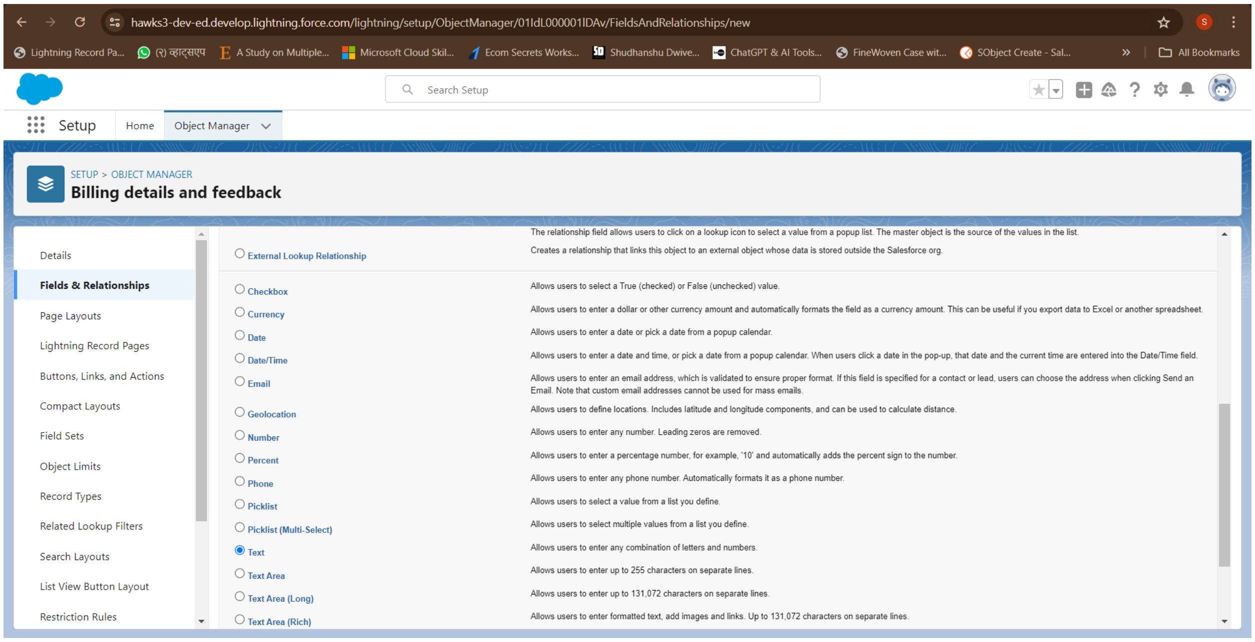


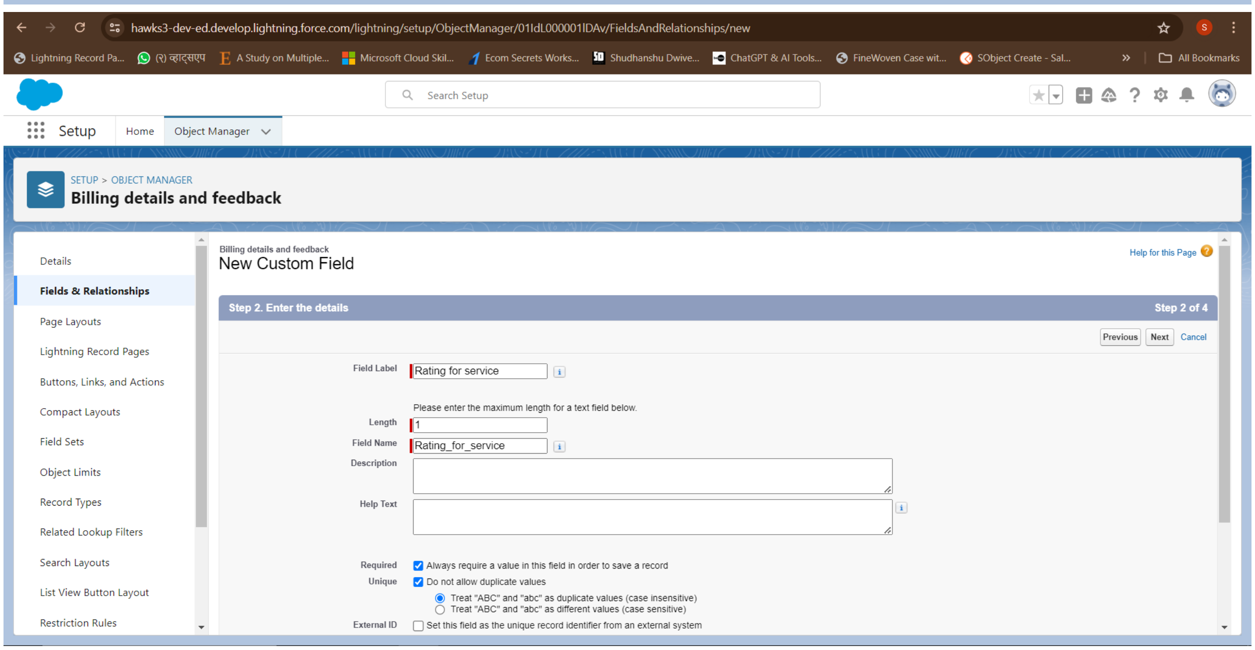

hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001lDAv/FieldsAndRelationships/new
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing details and feedback
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Previous
Next
Cancel
Field Label
Payment Paid
Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".
Length
18
Number of digits to the left of the decimal point
Decimal Places
0
Number of digits to the right of the decimal point
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

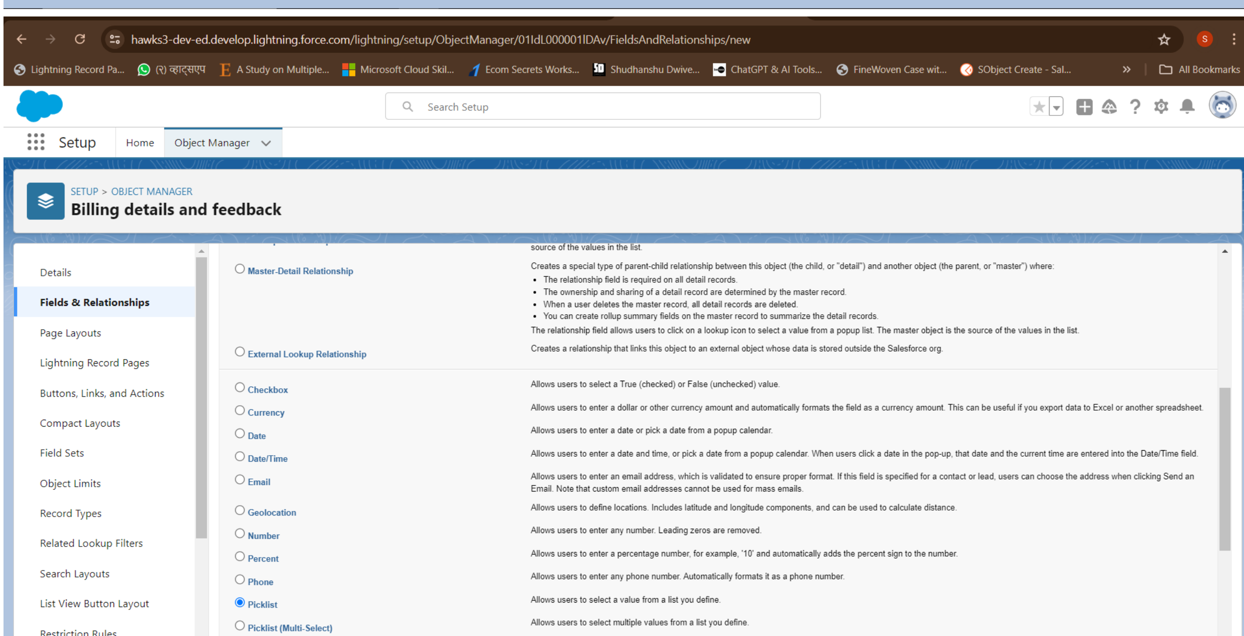

hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001lDAv/FieldsAndRelationships/new
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing details and feedback
Previous
Next
Cancel
Field Label
Payment Paid
Data Type
Currency
Field Name
Payment_Paid
Description
Select 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
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
Force.com - Free User

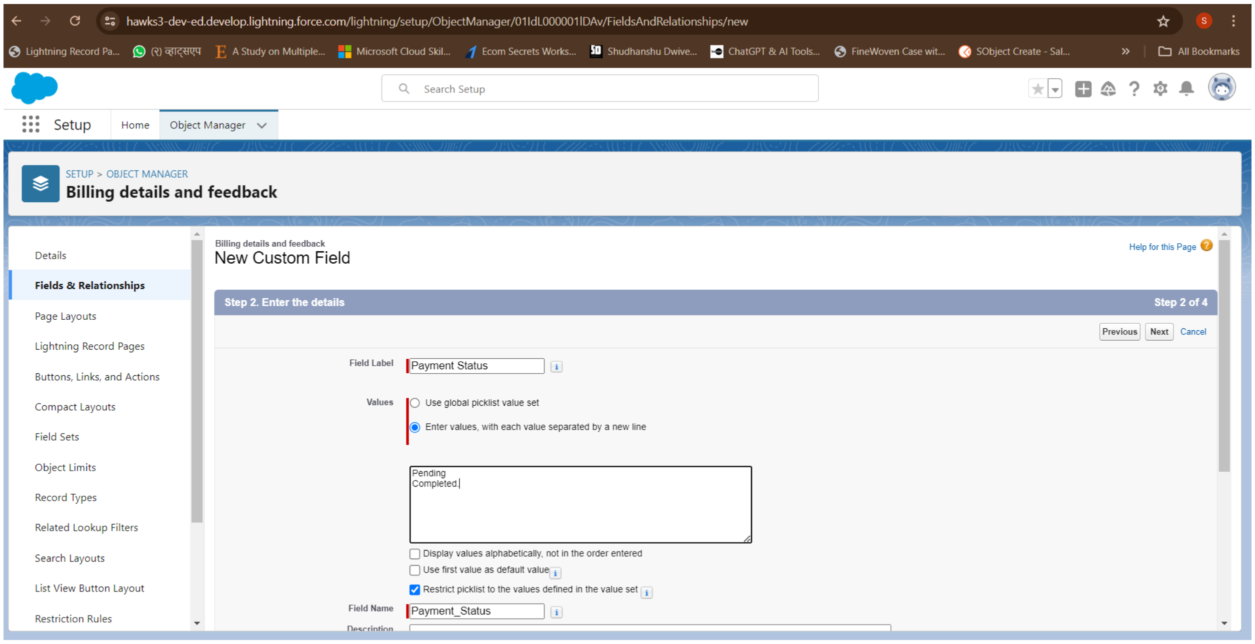

Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing details and feedback
Billing details and feedback
New Custom Field
Help for this Page
Step 4. Add to page layouts
Step 4 of 4
Previous
Save & New
Save
Cancel
Field Label
Payment Paid
Data Type
Currency
Field Name
Payment_Paid
Description
Select 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.

8


hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001IDAv/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > 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.
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/01IdL000001IDAv/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing details and feedback
Billing details and feedback
New Custom Field
Help for this Page
Step 2. Enter the details
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
Treat "ABC" and "abc" as duplicate values (case insensitive)
Treat "ABC" and "abc" as different values (case sensitive)
External ID
Set this field as the unique record identifier from an external system


hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001IDAv/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing details and feedback
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.
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.
External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
Checkbox
Currency
Date
Date/Time
Email
Geolocation
Number
Percent
Phone
Picklist
Picklist (Multi-Select)



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

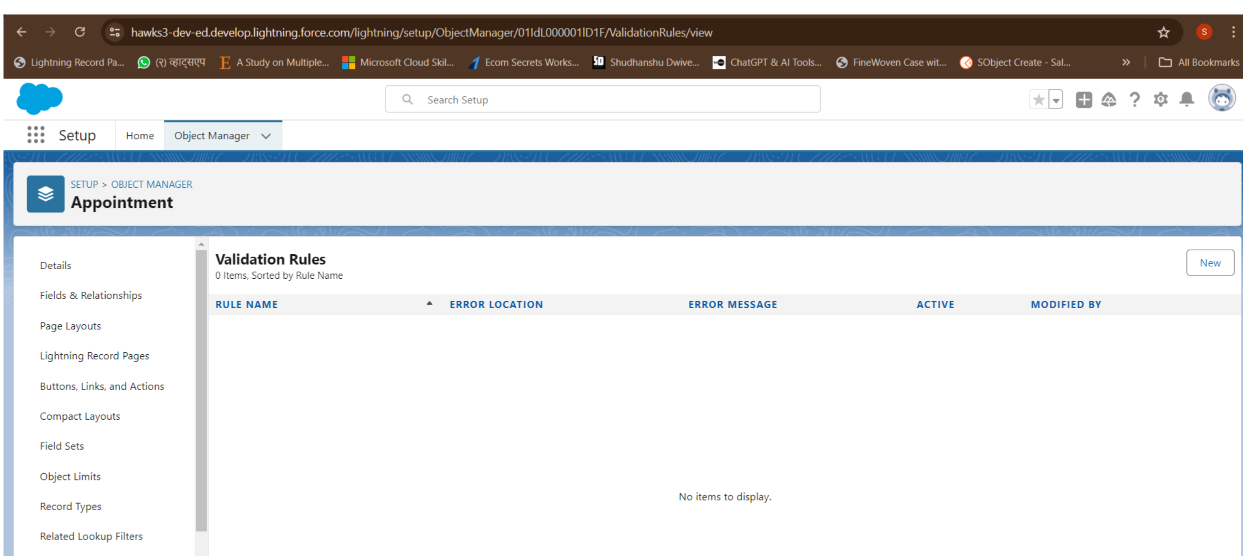
3.6 Validation Rules

3.6.1 Creating Validation Rules

Task: Set up validation rules to ensure data accuracy.

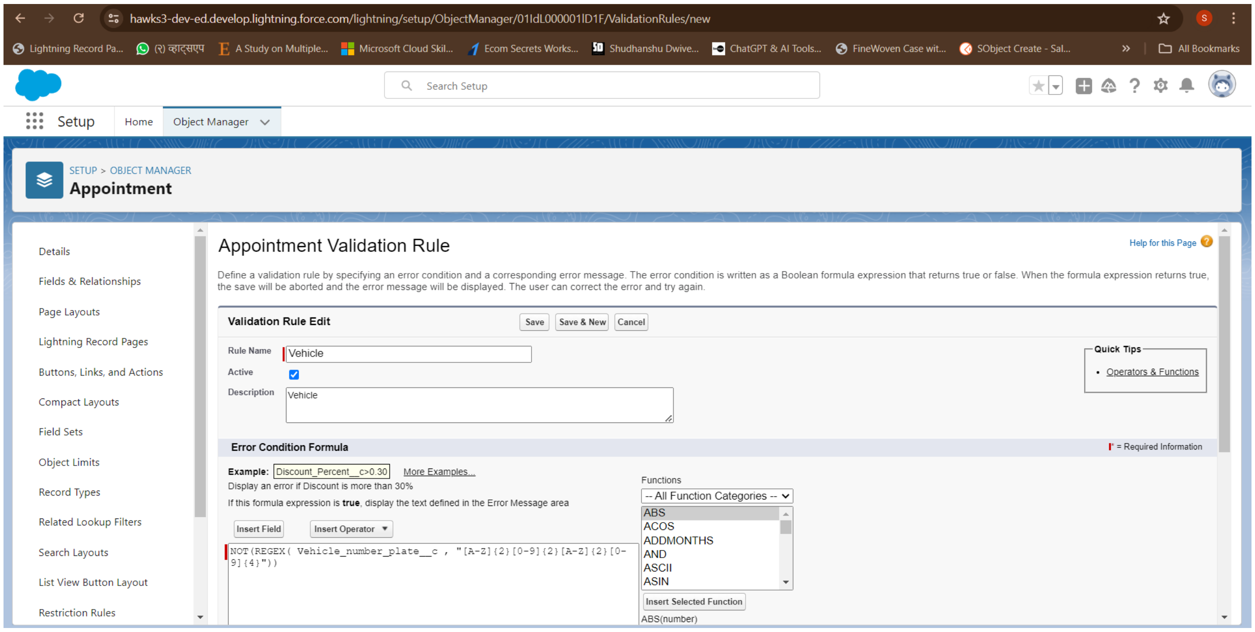
Process:

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

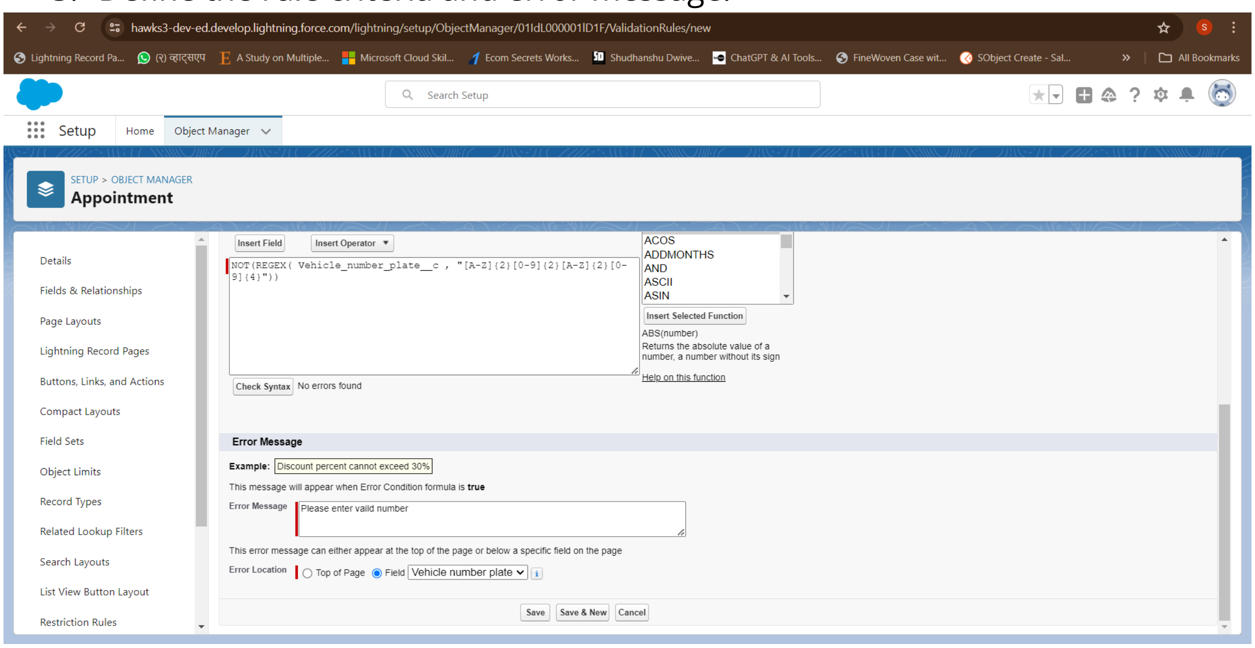


For Appointment

2. Click **Validation Rules** > **New**.



3. Define the rule criteria and error message.

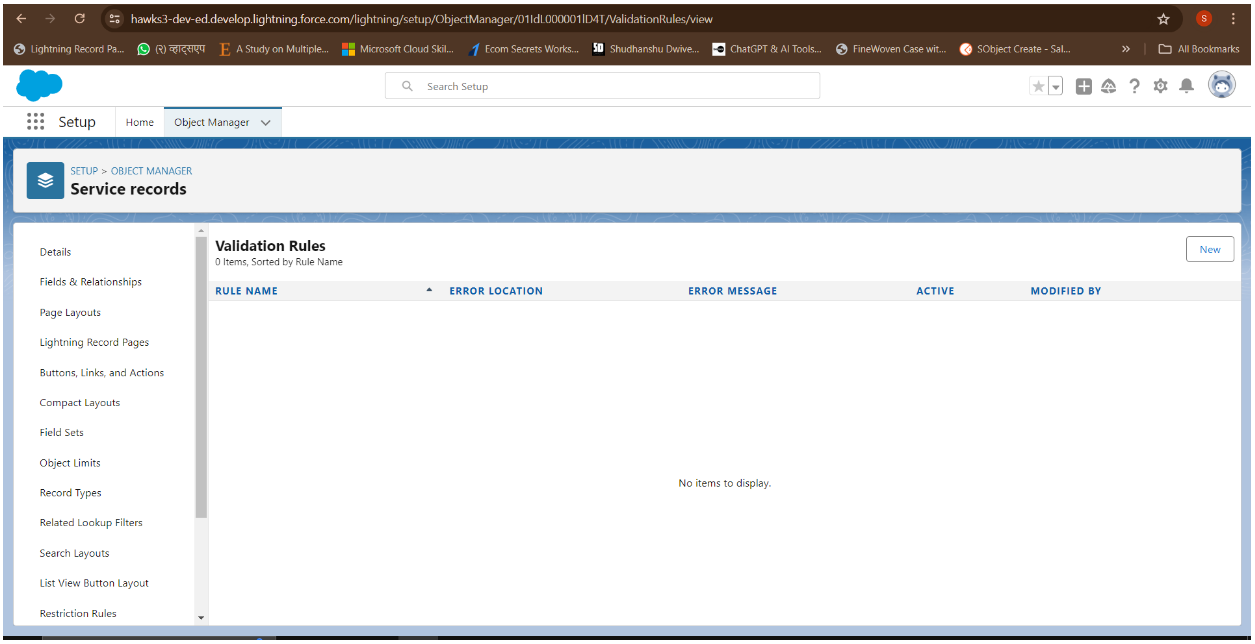


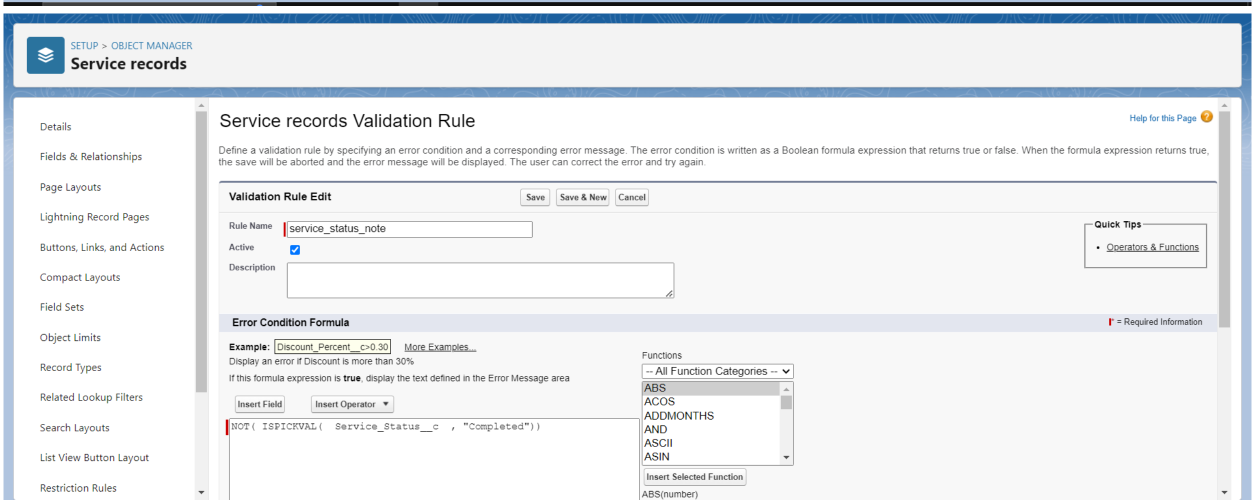
4. Click **Save**.

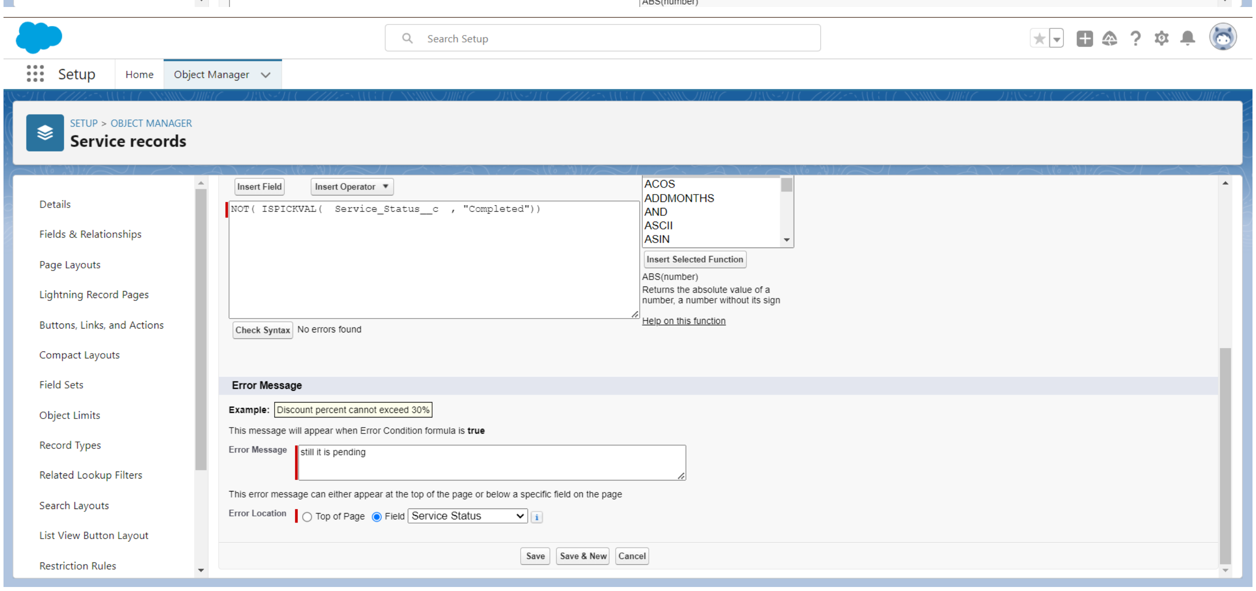
Example Validation Rule: Ensure the appointment date is always in the future.

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

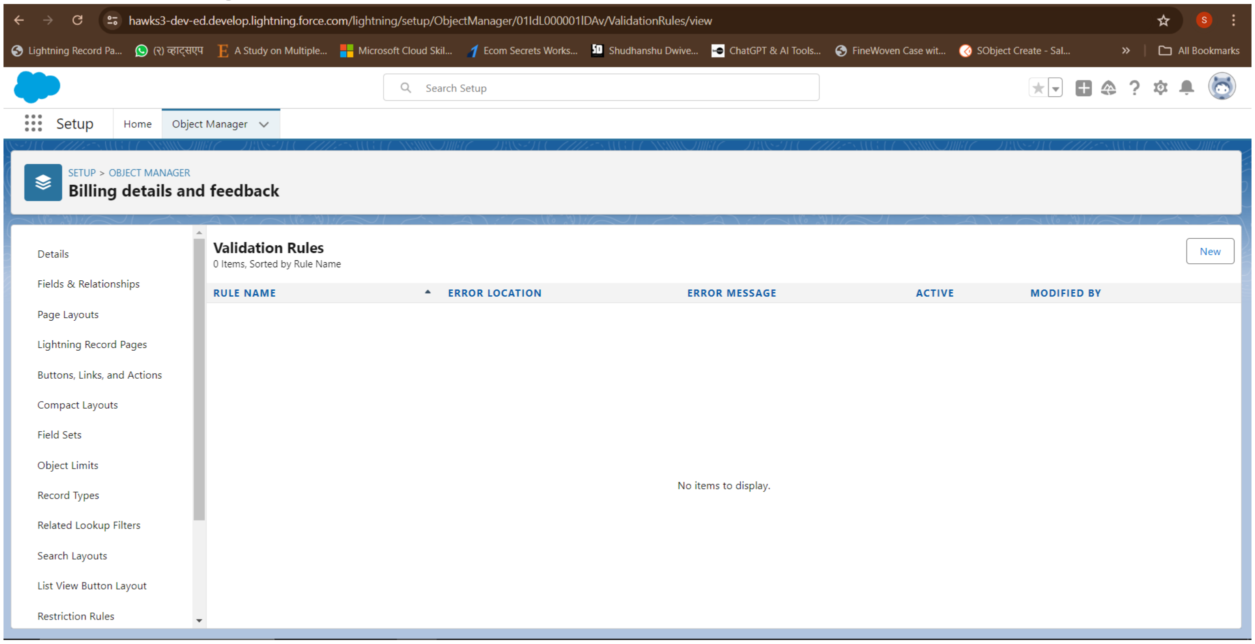
Repeating this process for Service Records

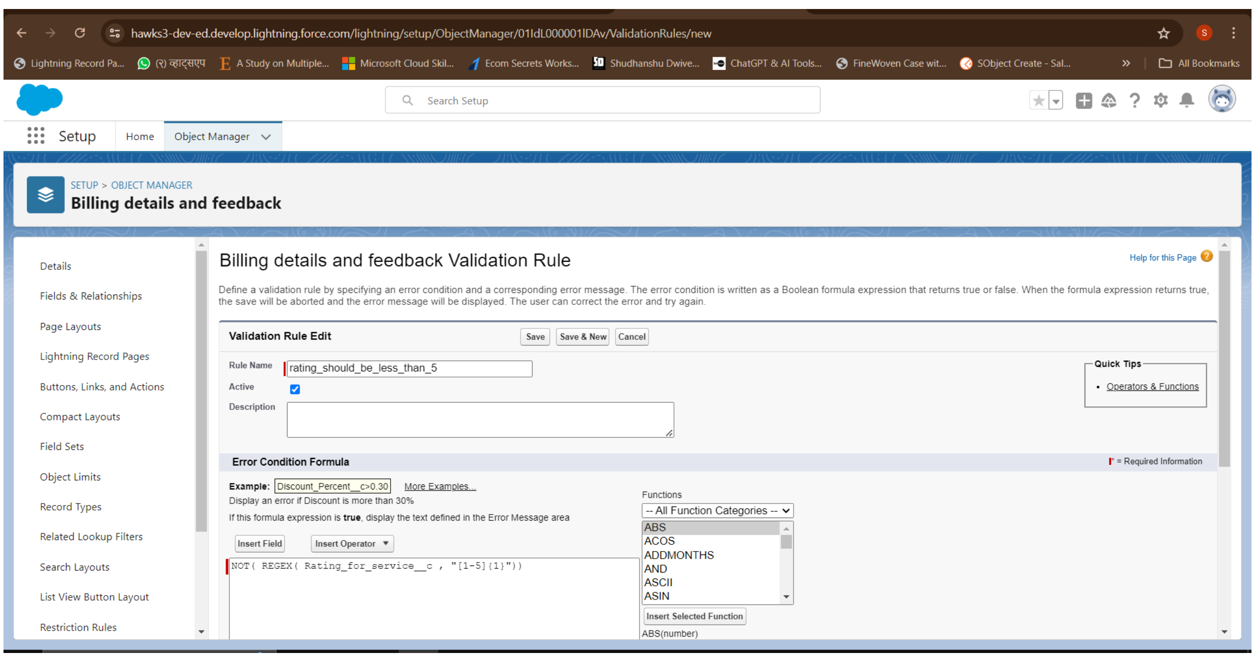

hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdL000001lD4T/ValidationRules/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Service records
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Validation Rules
0 Items, Sorted by Rule Name
New
RULE NAME
ERROR LOCATION
ERROR MESSAGE
ACTIVE
MODIFIED BY
No items to display.

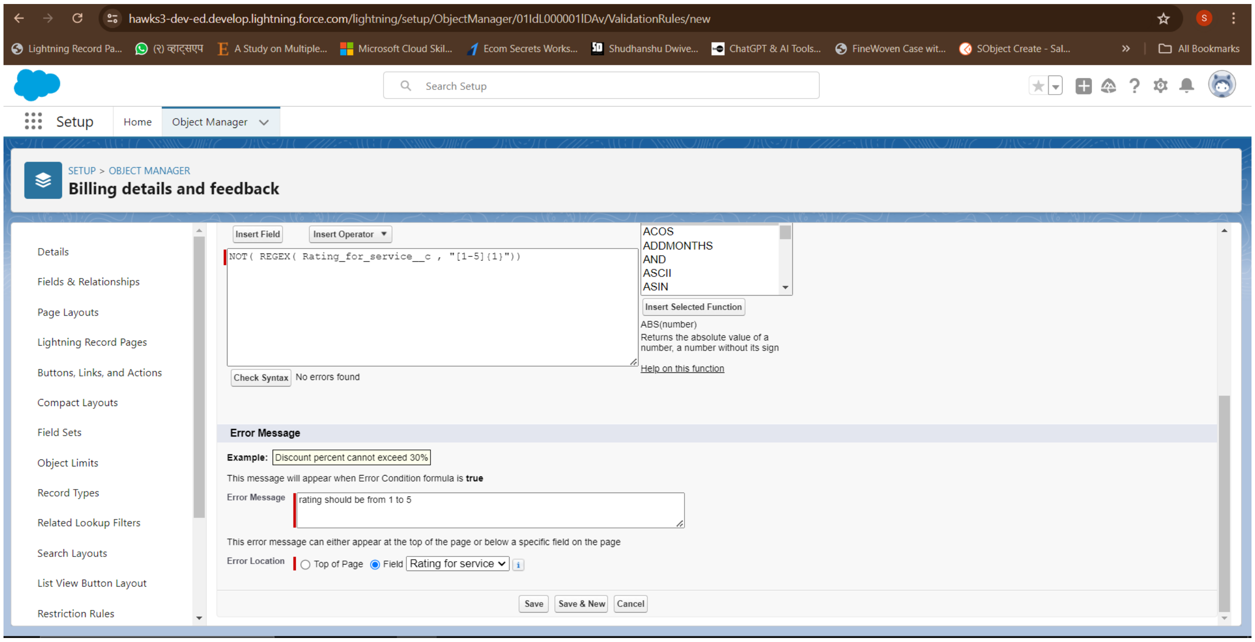

SETUP > OBJECT MANAGER
Service records
Service records Validation Rule
Help for this Page
Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression 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
Save
Save & New
Cancel
Rule Name
service_status_note
Active
Description
Quick Tips
Operators & Functions
Error Condition Formula
= Required Information
Example: Discount_Percent__c>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
Insert Field
Insert Operator
NOT(ISPICKVAL(Service_Status__c , "Completed"))
Functions
-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function
ABS(number)


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Service records
Insert Field
Insert Operator
NOT(ISPICKVAL(Service_Status__c , "Completed"))
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function
ABS(number)
Returns the absolute value of a number, a number without its sign
Help on this function
Check Syntax
No errors found
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







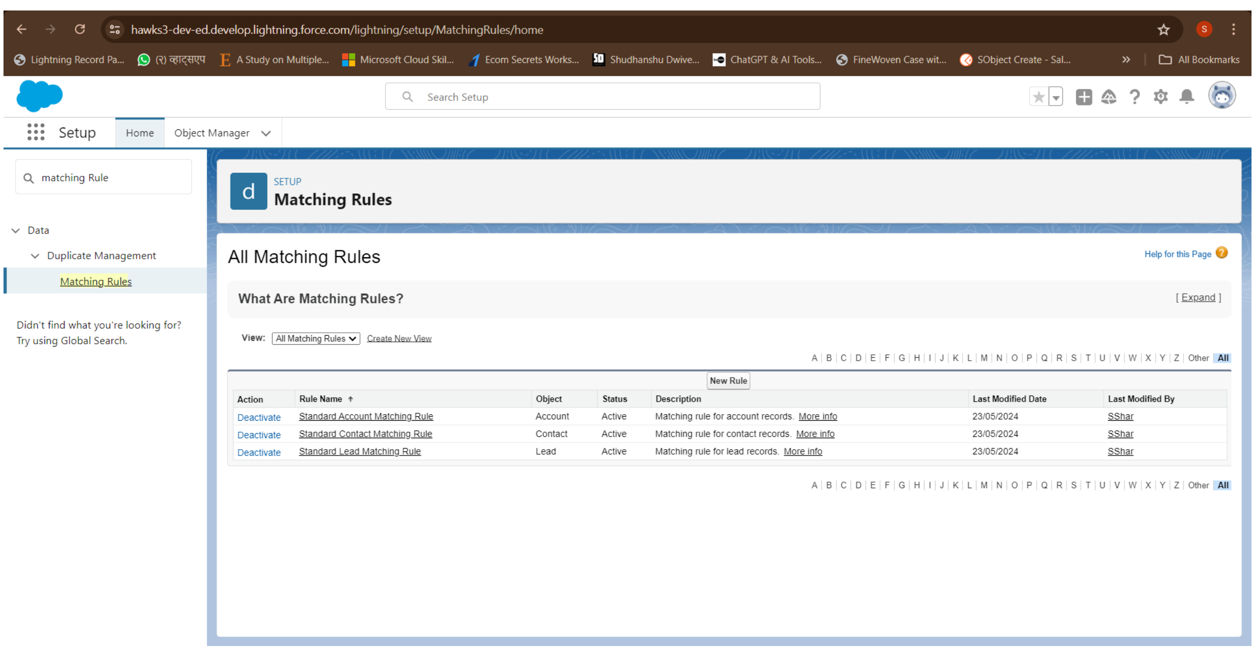
3.7 Duplicate Rules

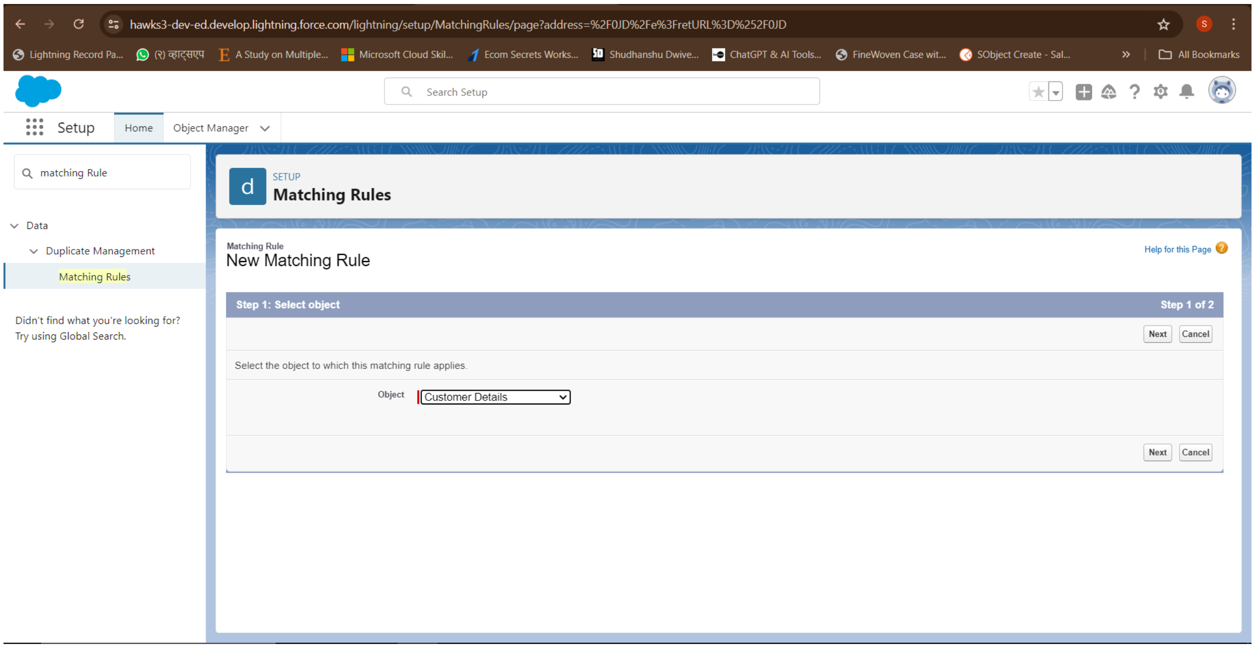
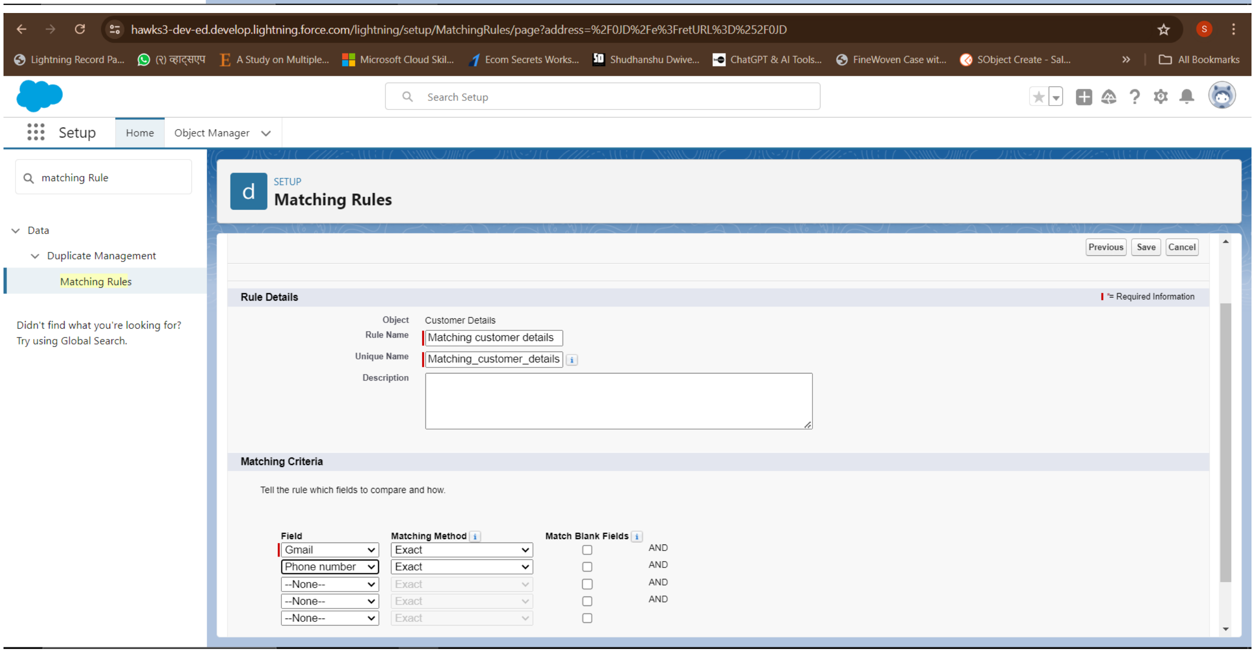
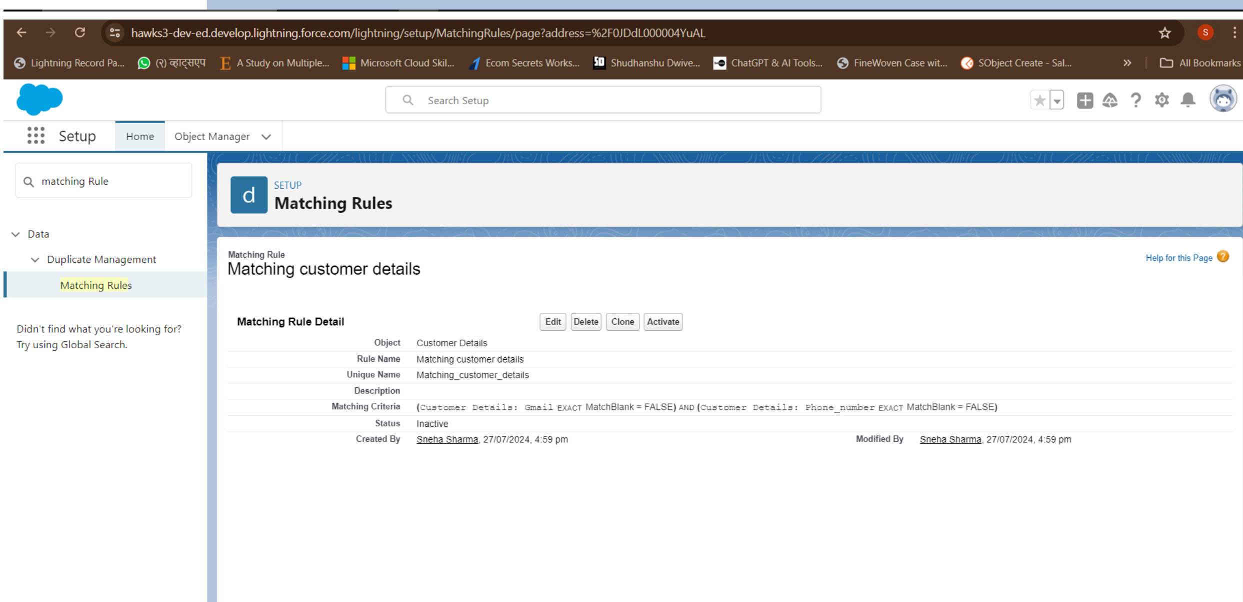
3.7.1 Creating Matching and Duplicate Rules

Task: Set up rules to avoid duplicate records.

Process:

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




hawks3-dev-ed.develop.lightning.force.com/lightning/setup/MatchingRules/page?address=%2F0JD%2Fe%3FretURL%3D%252F0JD
Search Setup
Setup
Home
Object Manager
matching Rule
Data
Duplicate Management
Matching Rules
Didn't find what you're looking for? Try using Global Search.
SETUP
Matching Rules
Matching Rule
New Matching Rule
Help for this Page
Step 1: Select object
Step 1 of 2
Next
Cancel
Select the object to which this matching rule applies.
Object
Customer Details
Next
Cancel

hawks3-dev-ed.develop.lightning.force.com/lightning/setup/MatchingRules/page?address=%2F0JD%2Fe%3FretURL%3D%252F0JD
Search Setup
Setup
Home
Object Manager
matching Rule
Data
Duplicate Management
Matching Rules
Didn't find what you're looking for? Try using Global Search.
SETUP
Matching Rules
Previous
Save
Cancel
Rule Details
= Required Information
Object
Customer Details
Rule Name
Matching customer details
Unique Name
Matching_customer_details
Description
Matching Criteria
Tell the rule which fields to compare and how.
Field
Matching Method
Match Blank Fields
Gmail
Exact
AND
Phone number
Exact
AND
--None--
Exact
AND
--None--
Exact
AND
--None--
Exact

hawks3-dev-ed.develop.lightning.force.com/lightning/setup/MatchingRules/page?address=%2F0JDdL000004YuAL
Search Setup
Setup
Home
Object Manager
matching Rule
Data
Duplicate Management
Matching Rules
Didn't find what you're looking for? Try using Global Search.
SETUP
Matching Rules
Matching Rule
Matching customer details
Help for this Page
Matching Rule Detail
Edit
Delete
Clone
Activate
Object
Customer Details
Rule Name
Matching customer details
Unique Name
Matching_customer_details
Description
Matching Criteria
(Customer Details: Gmail EXACT MatchBlank = FALSE) AND (Customer Details: Phone_number EXACT MatchBlank = FALSE)
Status
Inactive
Created By
Sneha Sharma, 27/07/2024, 4:59 pm
Modified By
Sneha Sharma, 27/07/2024, 4:59 pm

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.

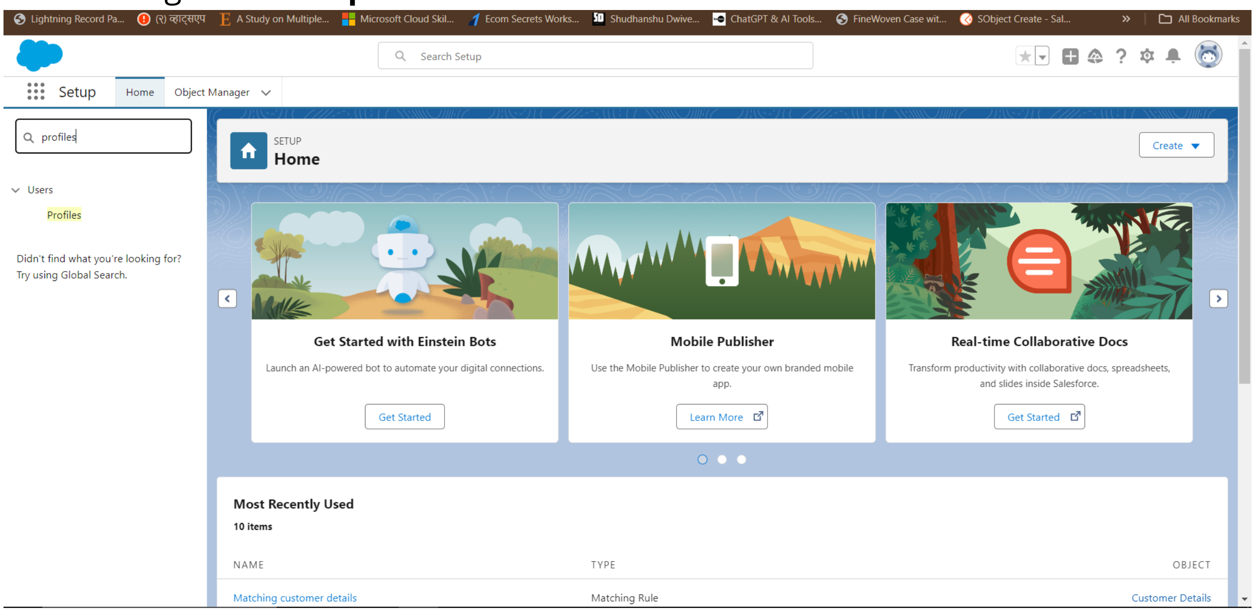
3.8 Profiles, Roles, and Users

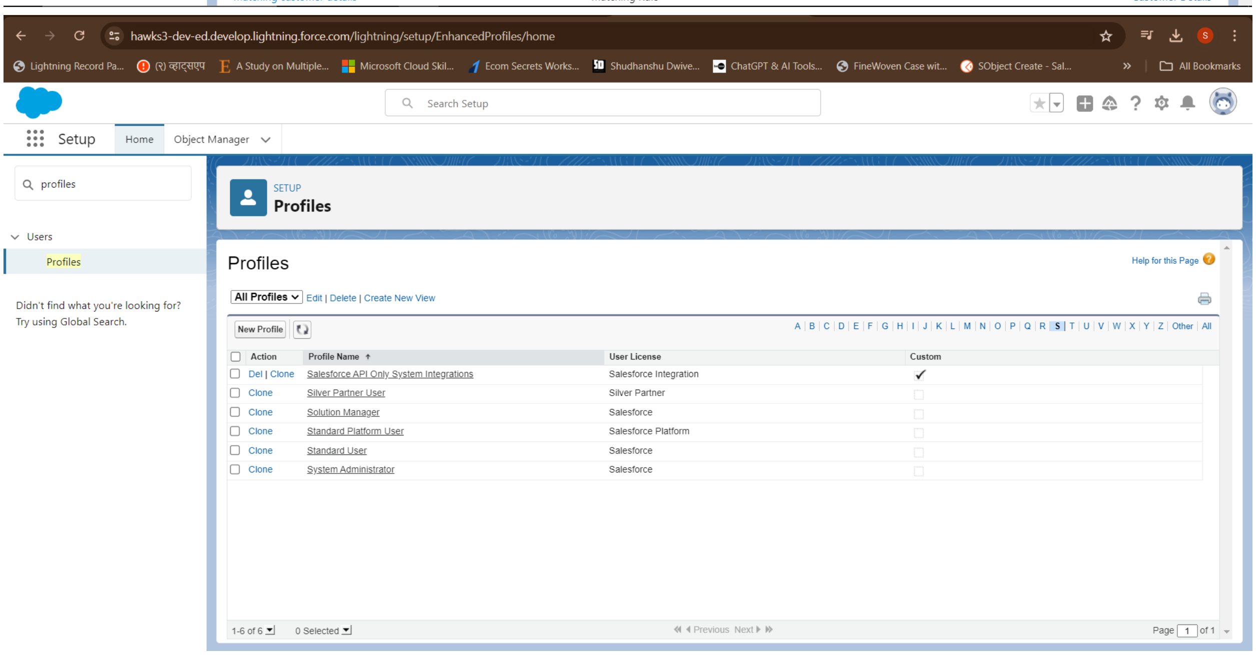
3.8.1 Creating Profiles

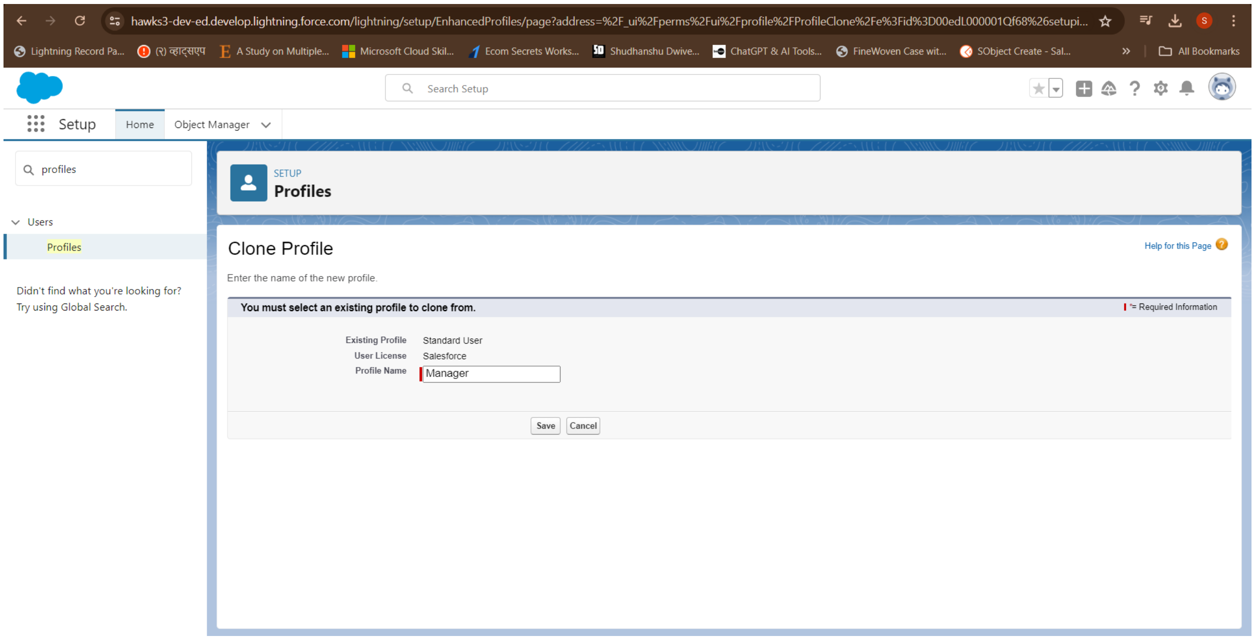
Task: Create profiles for different user roles.

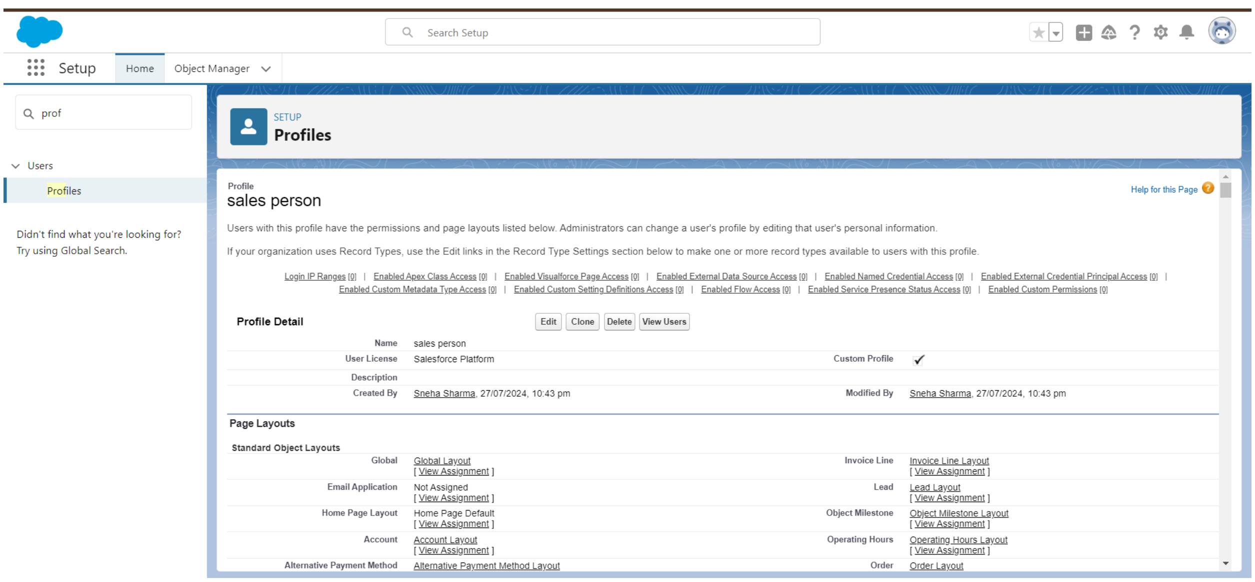
Process:

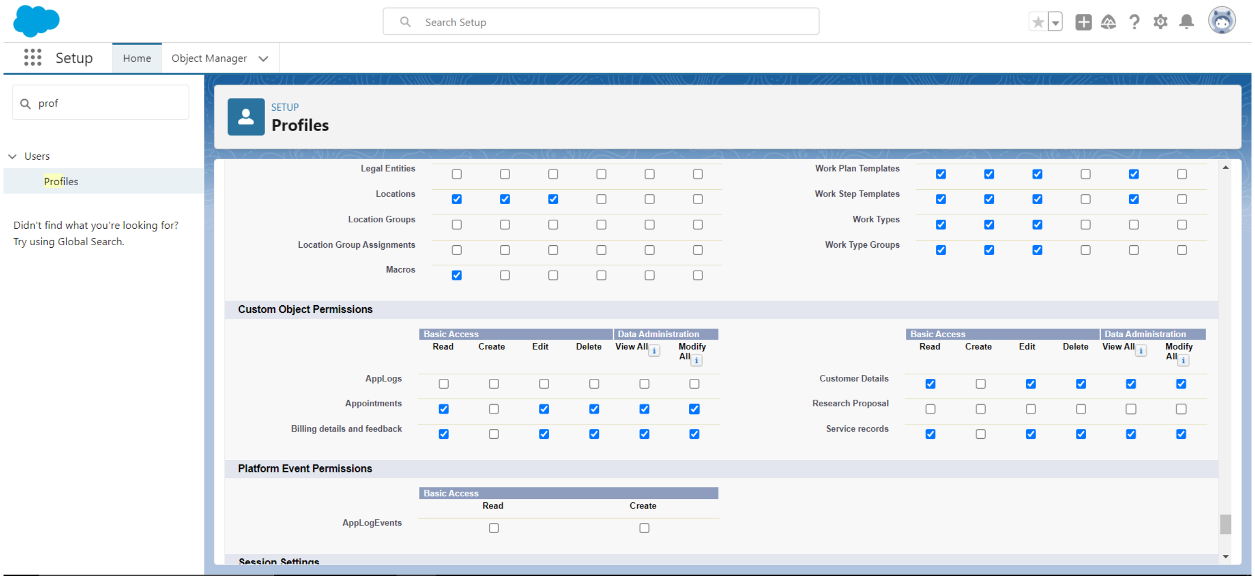
1. Navigate to **Setup** > **Profiles** > **New Profile**.

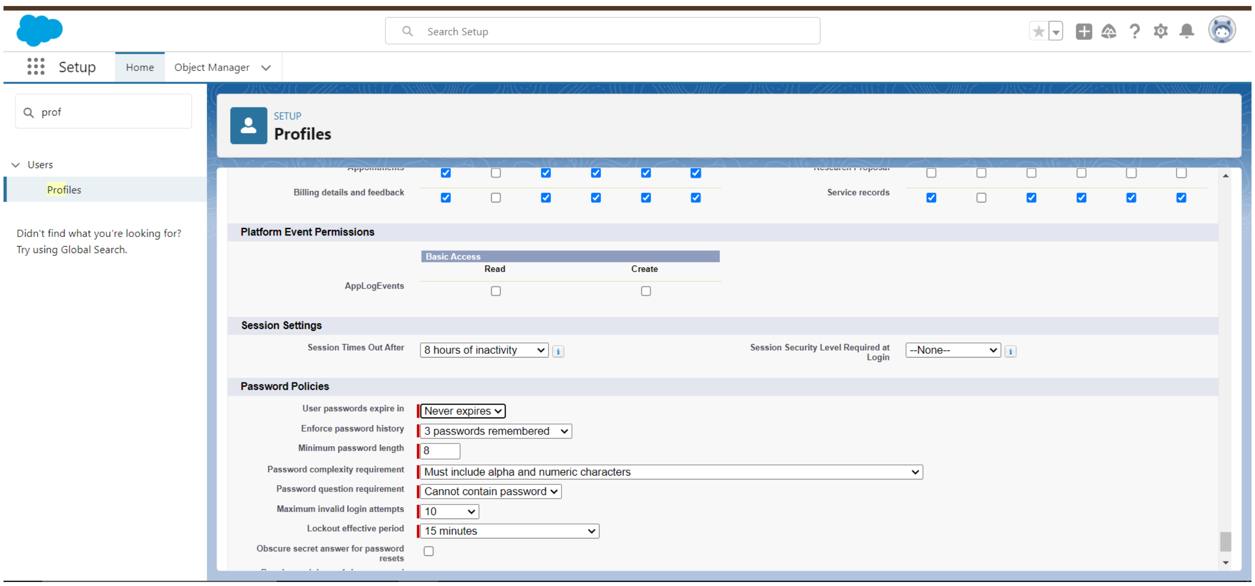


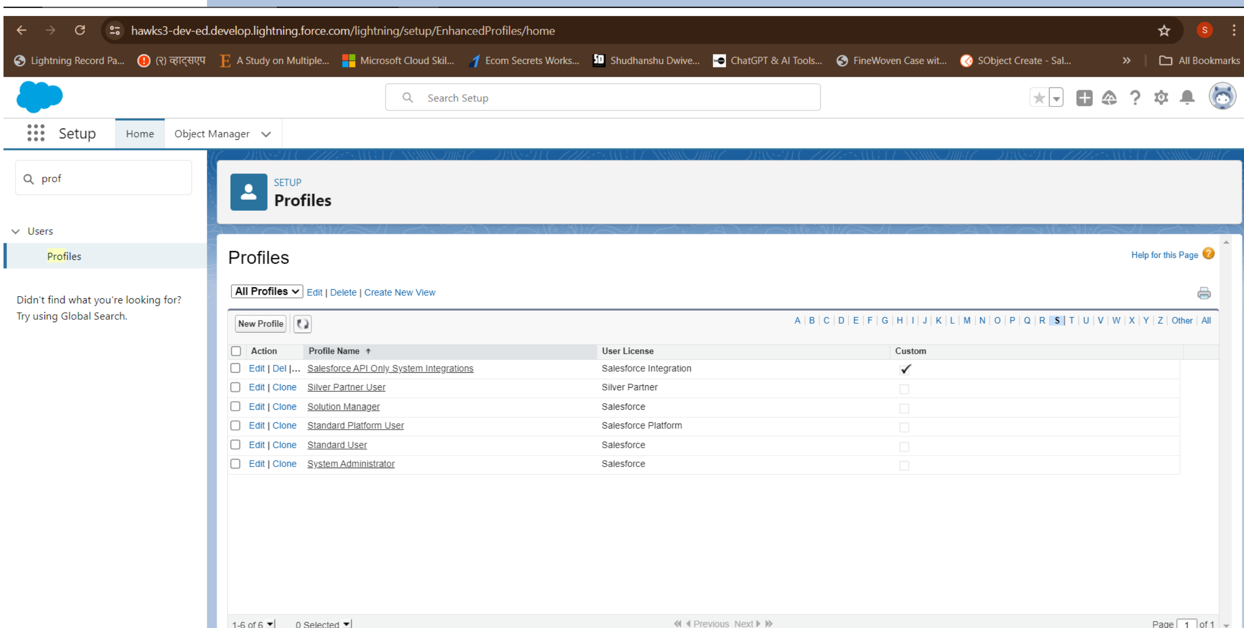


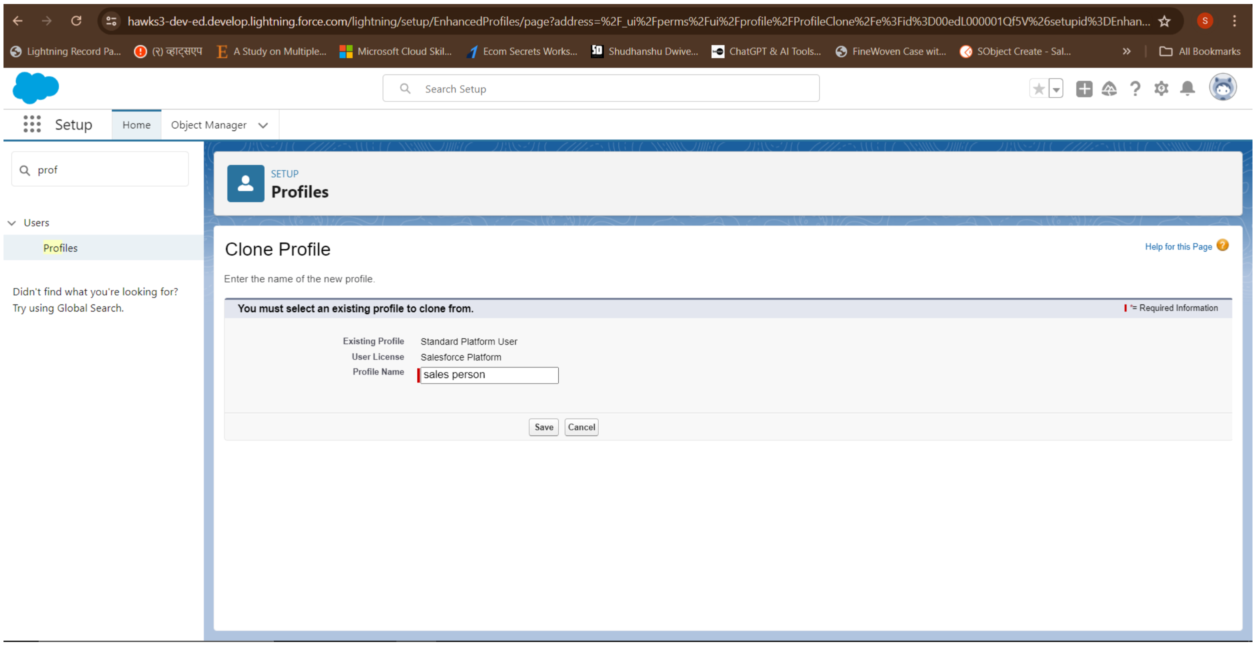

hawks3-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F_ui%2Fperms%2Fui%2Fprofile%2FProfileClone%2Fe%3Fid%3D00edL000001Qf68%26setupi...
Search Setup
Setup
Home
Object Manager
profiles
Users
Profiles
Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Clone Profile
Help for this Page
Enter the name of the new profile.
You must select an existing profile to clone from.
= Required Information
Existing Profile
Standard User
User License
Salesforce
Profile Name
Manager
Save
Cancel

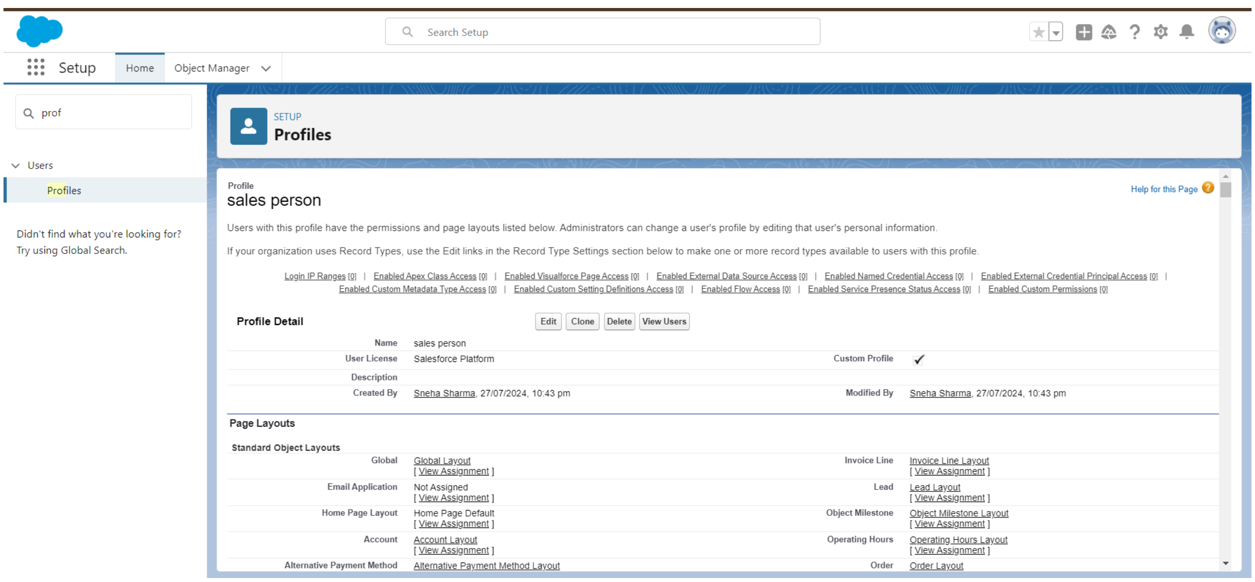

Search Setup
Setup
Home
Object Manager
prof
Users
Profiles
Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Profile
sales person
Help for this Page
Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing 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.
Profile Detail
Edit
Clone
Delete
View Users
Name
sales person
User License
Salesforce Platform
Custom Profile
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
Invoice Line
Invoice Line Layout
Email Application
Not Assigned
Lead
Lead Layout
Home Page Layout
Home Page Default
Object Milestone
Object Milestone Layout
Account
Account Layout
Operating Hours
Operating Hours Layout
Alternative Payment Method
Alternative Payment Method Layout
Order
Order Layout

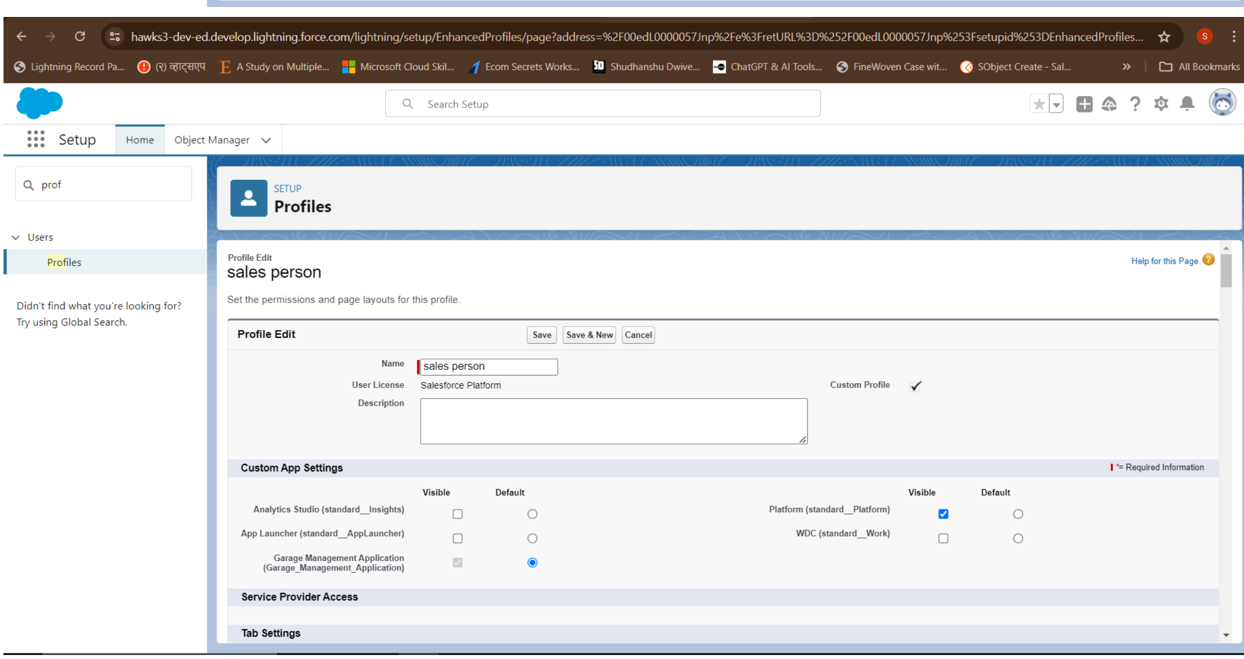

Search Setup
Setup
Home
Object Manager
prof
Users
Profiles
Didn't find what you're looking for? Try using Global Search.
SETUP
Profiles
Legal Entities
Locations
Location Groups
Location Group Assignments
Macros
Work Plan Templates
Work Step Templates
Work Types
Work Type Groups
Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
AppLogs
Appointments
Billing details and feedback
Customer Details
Research Proposal
Service records
Platform Event Permissions
AppLogEvents
Session Settings

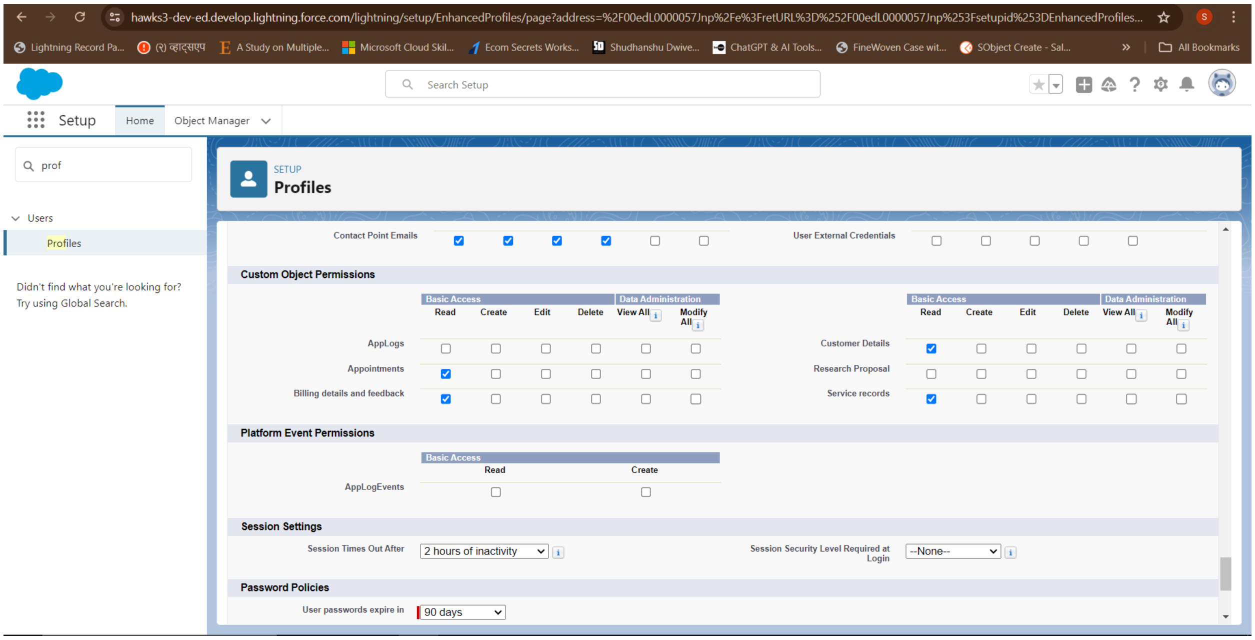

Search Setup
Setup
Home
Object Manager
prof
Users
Profiles
Didn't find what you're looking for? Try using Global Search.
SETUP
Profiles
Billing details and feedback
Service records
Platform Event Permissions
Basic Access
Read
Create
AppLogEvents
Session Settings
Session Times Out After
8 hours of inactivity
Session Security Level Required at Login
--None--
Password Policies
User passwords expire 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


hawks3-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/home
Lightning Record Pa...
A Study on Multiple...
Microsoft Cloud Skil...
Ecom Secrets Works...
Shudhanshu Dwive...
ChatGPT & AI Tools...
FineWoven Case wit...
SObject Create - Sal...
All Bookmarks
Search Setup
Setup
Home
Object Manager
prof
Users
Profiles
Didn't find what you're looking for? Try using Global Search.
SETUP
Profiles
Profiles
Help for this Page
All Profiles
Edit | Delete | Create New View
New Profile
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
Action
Profile Name
User License
Custom
Edit | Del |...
Salesforce API Only System Integrations
Salesforce Integration
Edit | Clone
Silver Partner User
Silver Partner
Edit | Clone
Solution Manager
Salesforce
Edit | Clone
Standard Platform User
Salesforce Platform
Edit | Clone
Standard User
Salesforce
Edit | Clone
System Administrator
Salesforce
1-6 of 6
0 Selected
Previous
Next
Page
1
of 1


hawks3-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F_ui%2Fperms%2Fui%2Fprofile%2FProfileClone%2Fe%3Fid%3D00edL000001Qf5V%26setupid%3DEnhan...
Setup
Home
Object Manager
Search Setup
prof
Users
Profiles
Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Clone Profile
Help for this Page
Enter the name of the new profile.
You must select an existing profile to clone from.
= Required Information
Existing Profile
Standard Platform User
User License
Salesforce Platform
Profile Name
sales person
Save
Cancel


Setup
Home
Object Manager
Search Setup
prof
Users
Profiles
Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Profile
sales person
Help for this Page
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.
Profile Detail
Edit
Clone
Delete
View Users
Name
sales person
User License
Salesforce Platform
Custom Profile
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]
Invoice Line
Invoice Line Layout
Email Application
Not Assigned
Lead
Lead Layout
Home Page Layout
Home Page Default
Object Milestone
Object Milestone Layout
Account
Account Layout
Operating Hours
Operating Hours Layout
Alternative Payment Method
Alternative Payment Method Layout
Order
Order Layout


hawks3-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edL0000057Jnp%2Fe%3FretURL%3D%252F00edL0000057Jnp%253Fsetupid%253DEnhancedProfiles...
Setup
Home
Object Manager
Search Setup
prof
Users
Profiles
Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Profile Edit
sales person
Help for this Page
Set the permissions and page layouts for this profile.
Profile Edit
Save
Save & New
Cancel
Name
sales person
User License
Salesforce Platform
Custom Profile
Description
Custom App Settings
= Required Information
Visible
Default
Analytics Studio (standard__Insights)
App Launcher (standard__AppLauncher)
Garage Management Application (Garage_Management_Application)
Platform (standard__Platform)
WDC (standard__Work)
Service Provider Access
Tab Settings



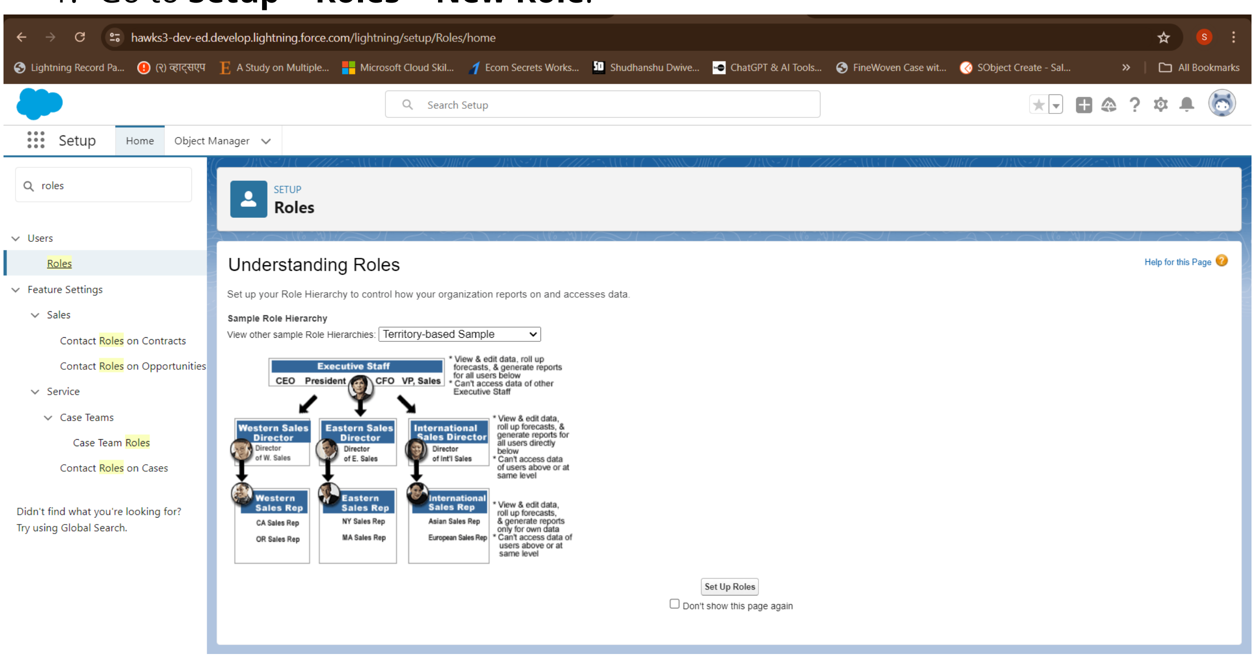
2. Select the profile type and customize permissions.
3. Click **Save**.

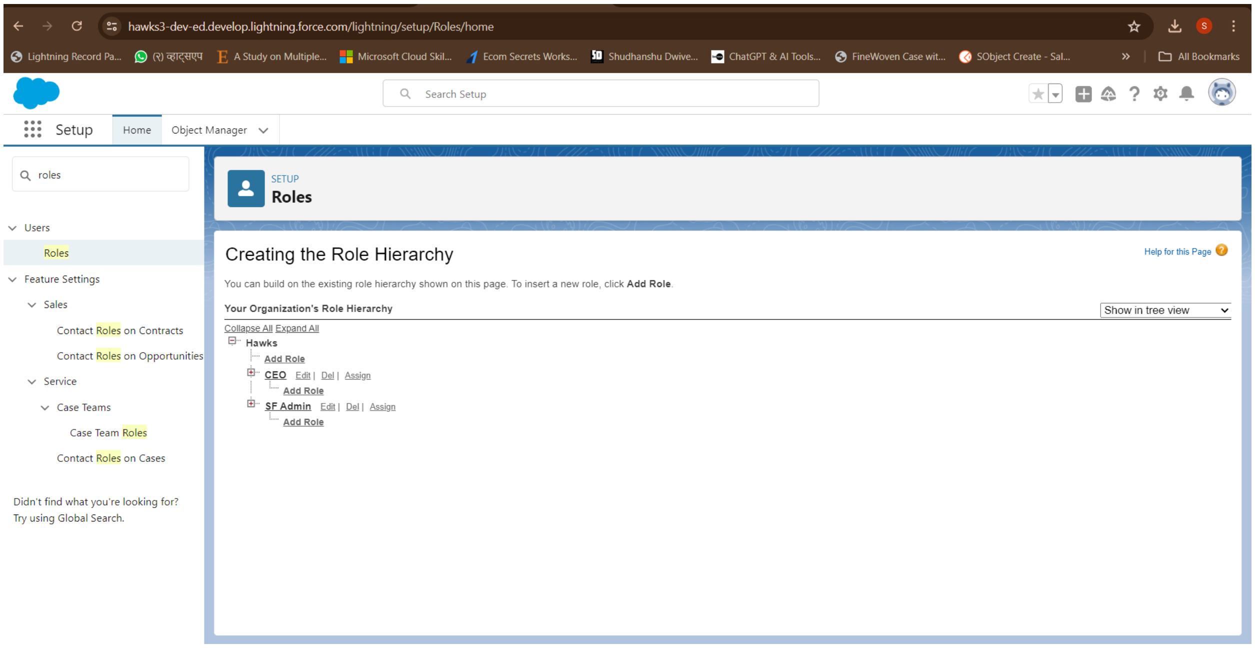
3.8.2 Creating Roles

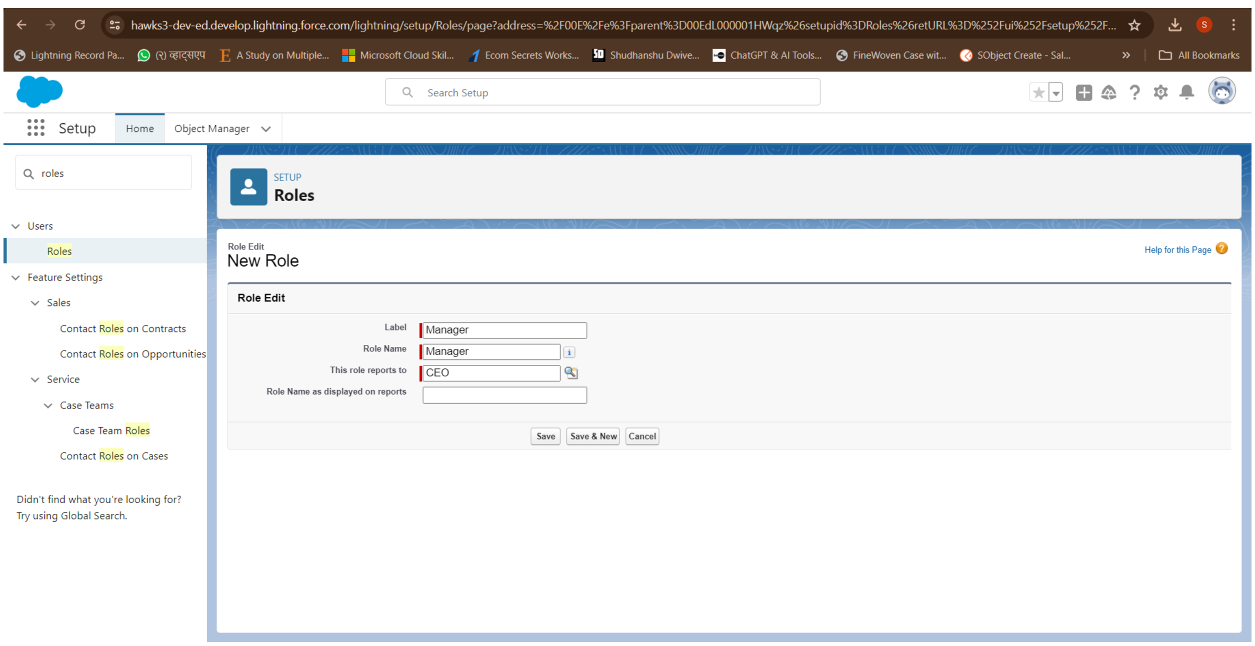
Task: Define roles to establish hierarchy and access.

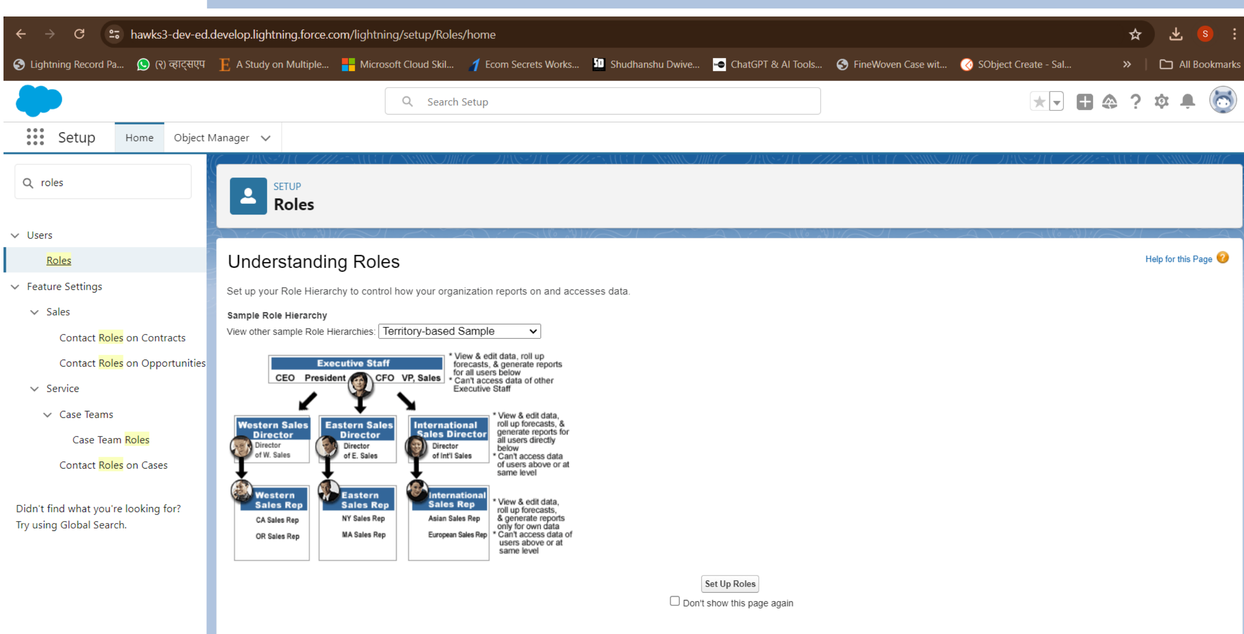
Process:

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

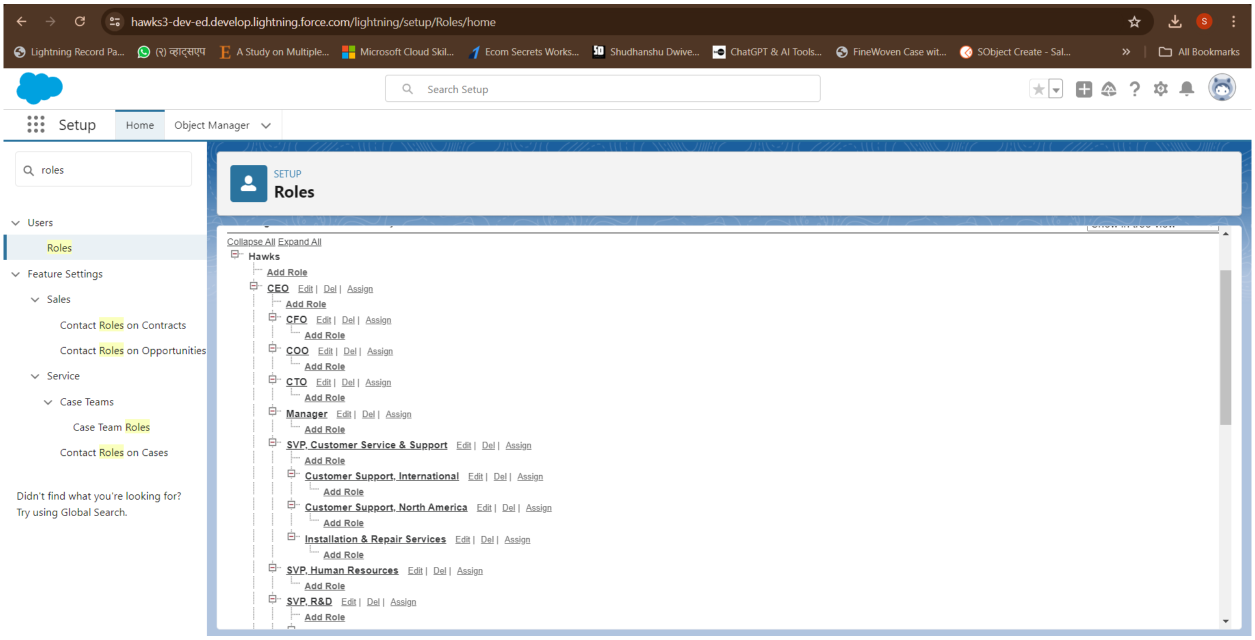


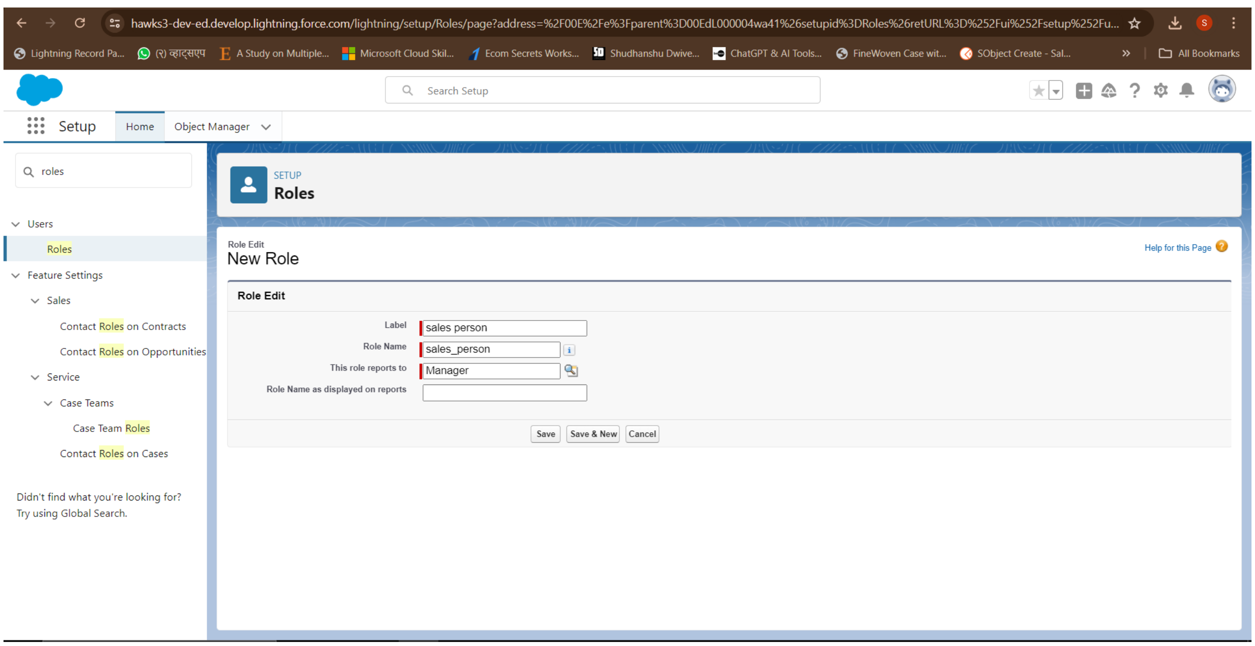

hawks3-dev-ed.develop.lightning.force.com/lightning/setup/Roles/home
Search Setup
Setup
Home
Object Manager
roles
Users
Roles
Feature Settings
Sales
Contact Roles on Contracts
Contact Roles on Opportunities
Service
Case Teams
Case Team Roles
Contact Roles on Cases
Didn't find what you're looking for?
Try using Global Search.
SETUP
Roles
Creating the Role Hierarchy
Help for this Page
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
Show in tree view
Collapse All Expand All
Hawks
Add Role
CEO Edit | Del | Assign
Add Role
SF Admin Edit | Del | Assign
Add Role


hawks3-dev-ed.develop.lightning.force.com/lightning/setup/Roles/page?address=%2F00E%2Fe%3Fparent%3D00EdL000001HWqz%26setupid%3DRoles%26retURL%3D%252Fui%252Fsetup%252F...
Search Setup
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
Didn't find what you're looking for?
Try using Global Search.
SETUP
Roles
Role Edit
New Role
Help for this Page
Role Edit
Label Manager
Role Name Manager
This role reports to CEO
Role Name as displayed on reports
Save
Save & New
Cancel


hawks3-dev-ed.develop.lightning.force.com/lightning/setup/Roles/home
Search Setup
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
Didn't find what you're looking for?
Try using Global Search.
SETUP
Roles
Understanding Roles
Help for this Page
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
Western Sales Director
Eastern Sales Director
International Sales Director
Western Sales Rep
Eastern Sales Rep
International Sales Rep
Set Up Roles
Don't show this page again

1





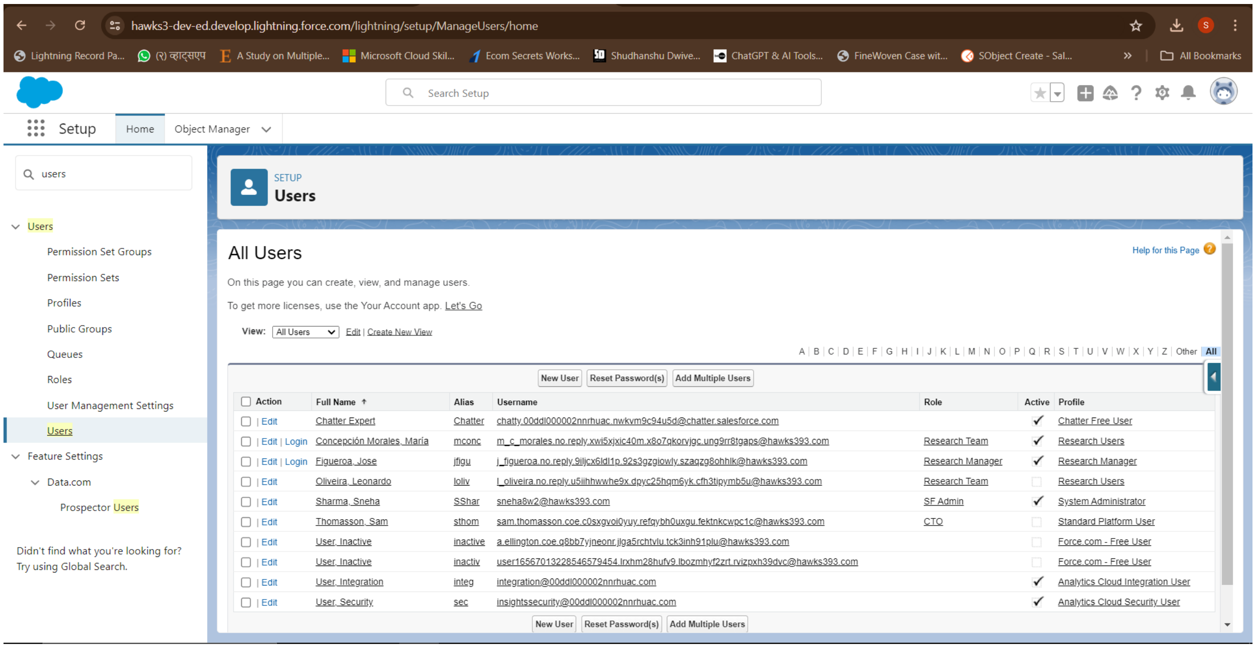
2. Define the role name and hierarchy.
3. Click **Save**.

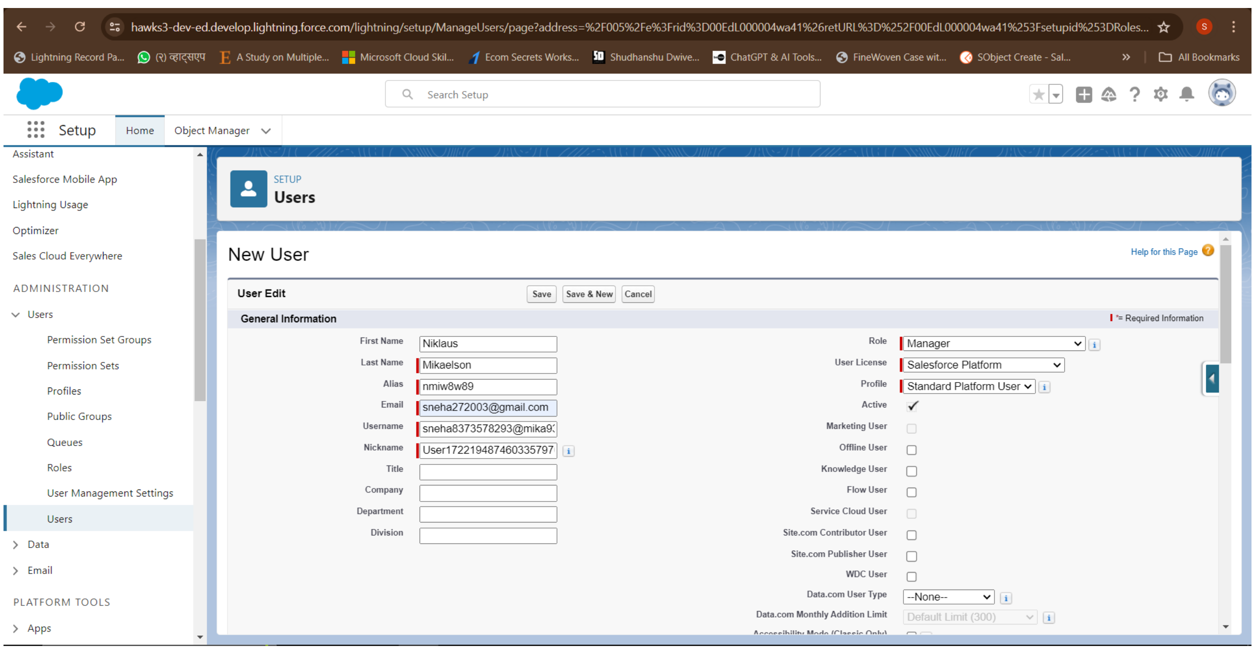
3.8.3 Creating Users

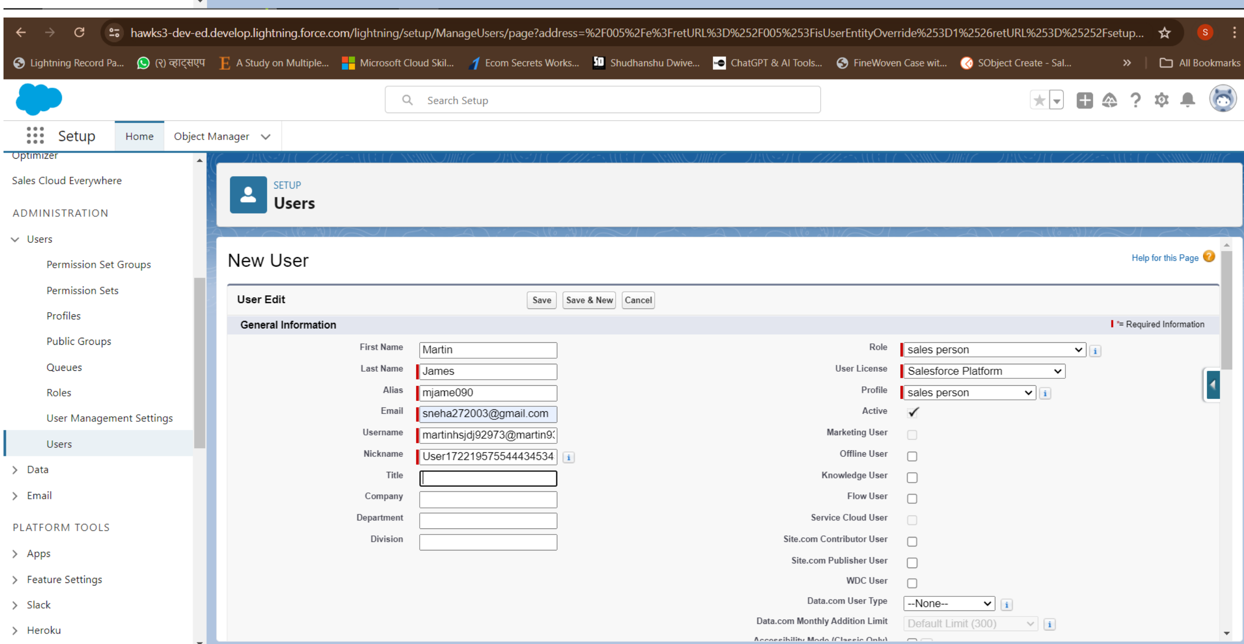
Task: Create users and assign roles and profiles.

Process:

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


hawks3-dev-ed.develop.lightning.force.com/lightning/setup/ManageUsers/home
Setup
Home
Object Manager
Search Setup
users
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Didn't find what you're looking for? Try using Global Search.
SETUP
Users
All Users
Help for this Page
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
New User
Reset Password(s)
Add Multiple Users
Action
Full Name
Alias
Username
Role
Active
Profile
Chatter Expert
Concepción Morales, María
Figueroa, Jose
Oliveira, Leonardo
Sharma, Sneha
Thomasson, Sam
User, Inactive
User, Integration
User, Security
Research Team
Research Manager
SF Admin
CTO
Chatter Free User
Research Users
Research Manager
System Administrator
Standard Platform User
Force.com - Free User
Analytics Cloud Integration User
Analytics Cloud Security User


Setup
Home
Object Manager
Search Setup
ADMINISTRATION
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
PLATFORM TOOLS
SETUP
Users
New User
Help for this Page
User Edit
Save
Save & New
Cancel
General Information
= Required Information
First Name
Niklaus
Last Name
Mikaelson
Alias
nmiw8w89
Email
sneha272003@gmail.com
Role
Manager
User License
Salesforce Platform
Profile
Standard Platform User
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Data.com User Type
--None--
Data.com Monthly Addition Limit
Default Limit (300)


Setup
Home
Object Manager
Search Setup
New User
User Edit
Save
Save & New
Cancel
General Information
First Name
Martin
Last Name
James
Alias
mjame090
Email
sneha272003@gmail.com
Role
sales person
User License
Salesforce Platform
Profile
sales person
Active

3

Enter user details and assign profiles and roles.

3. Click **Save**.

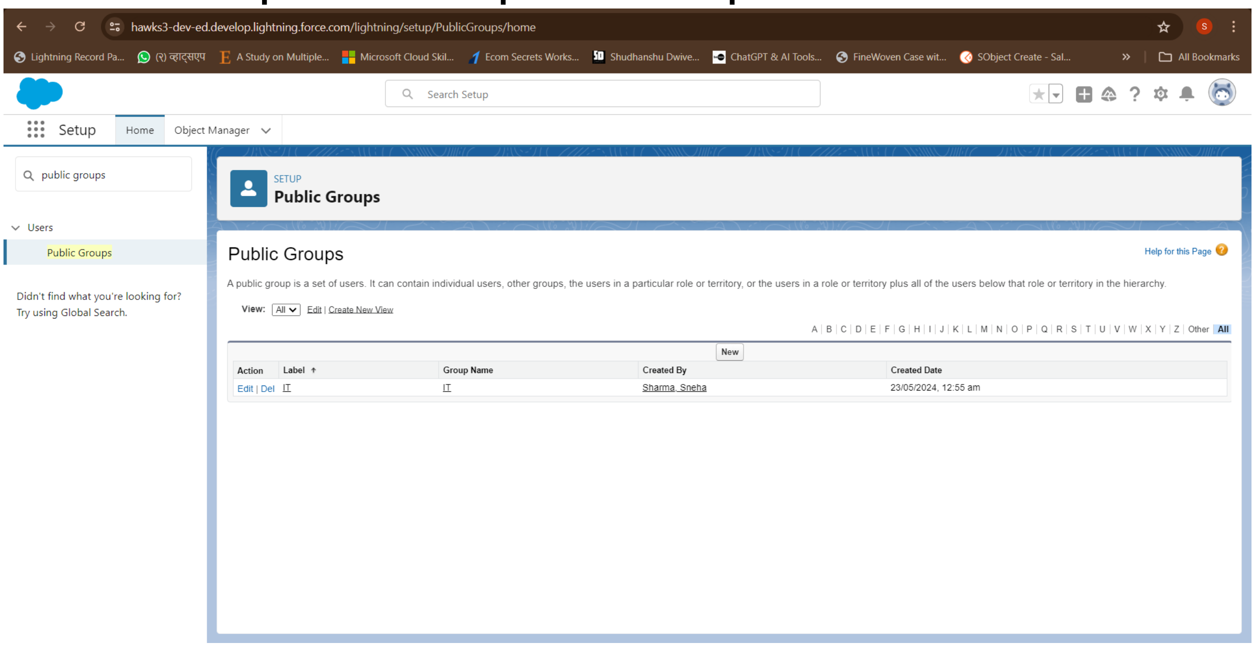
3.9 Public Groups and Sharing Settings

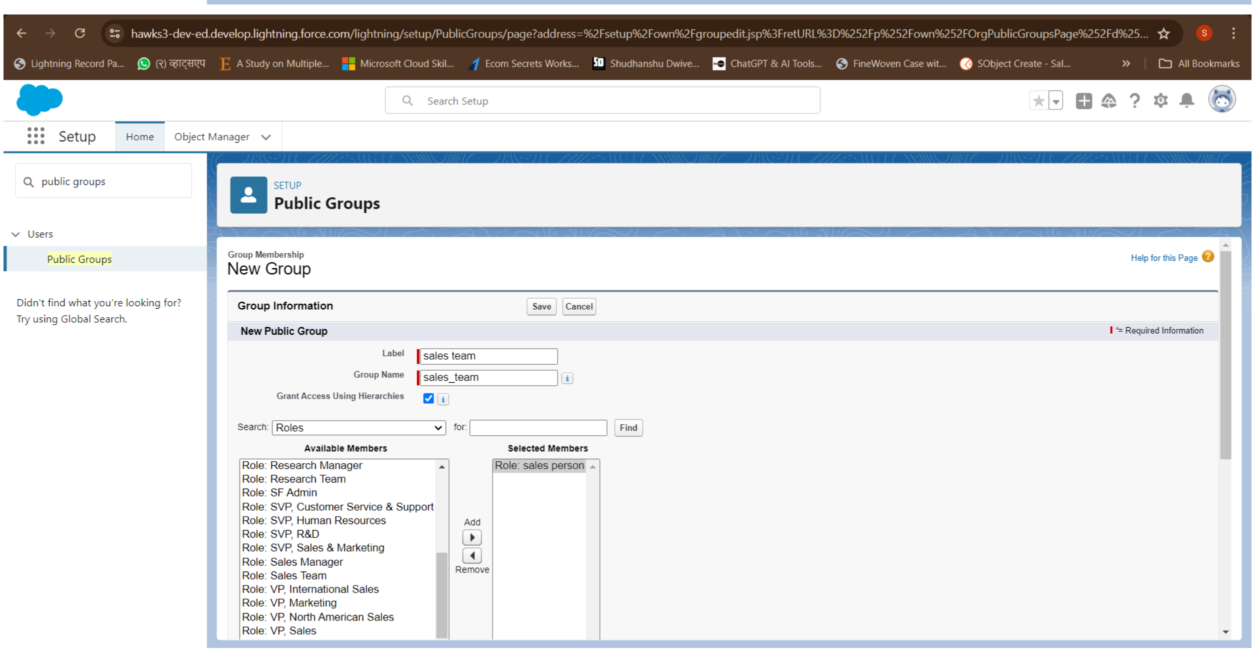
3.9.1 Creating Public Groups

Task: Set up public groups for data sharing.

Process:

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





2. Define the group name and members.

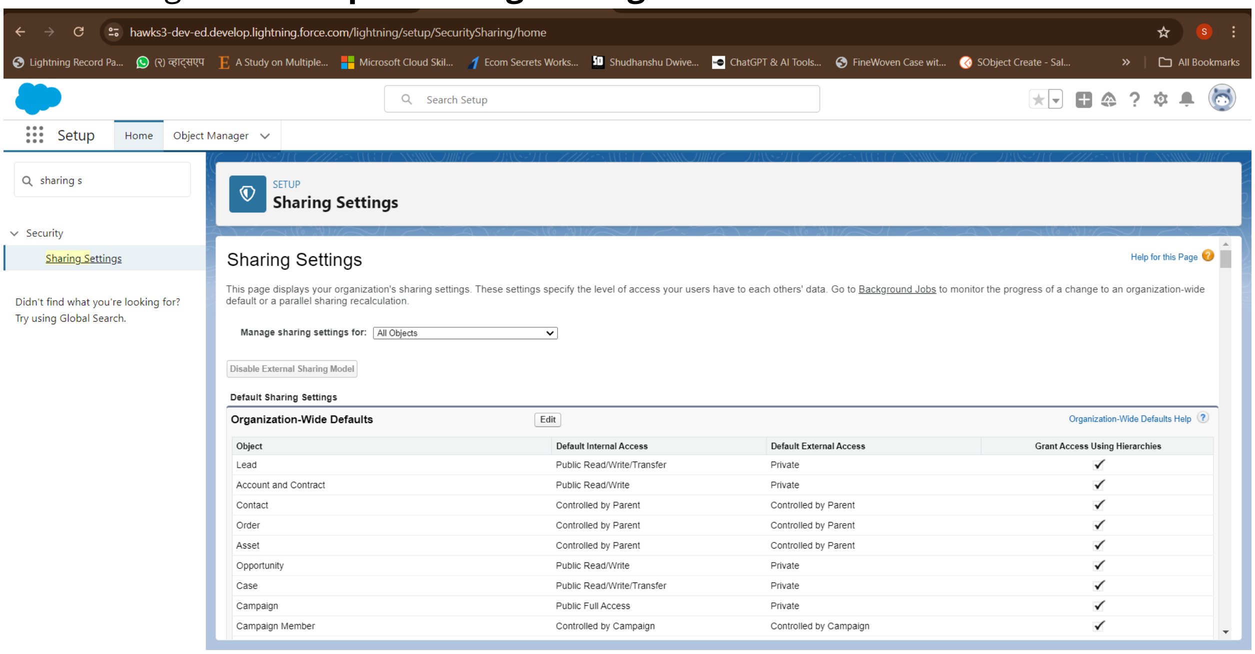
3. Click **Save**.

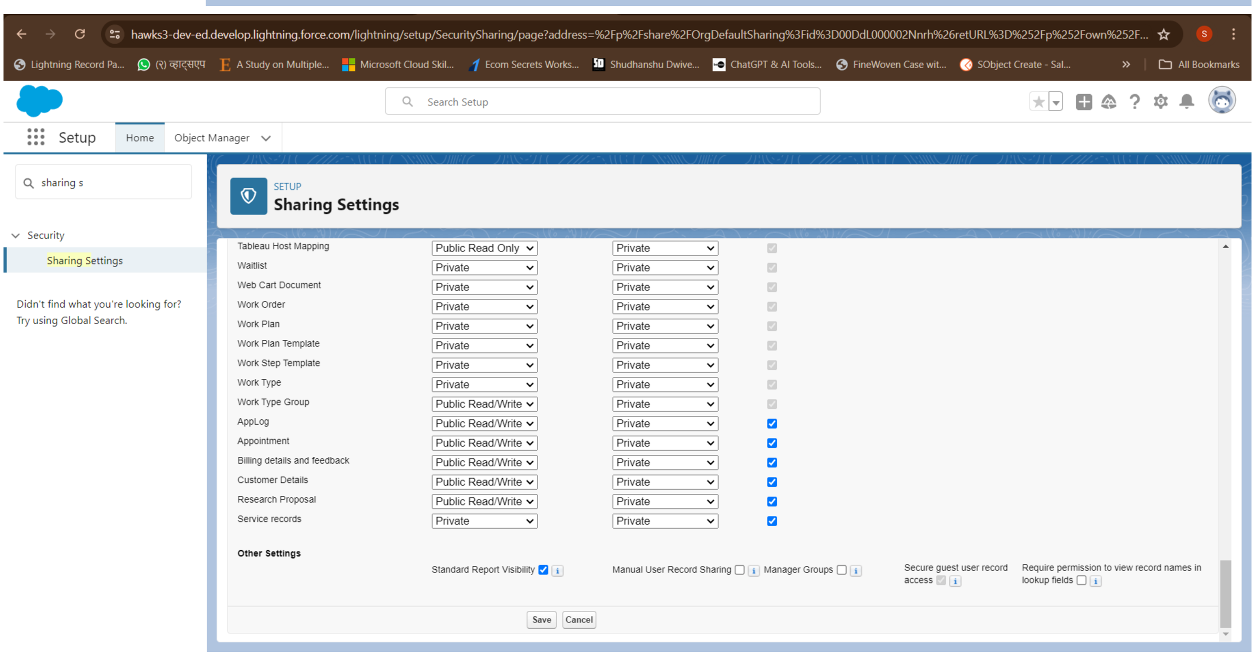
3.9.2 Setting Up Sharing Settings

Task: Configure sharing settings to control data access.

Process:

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





2. Set up organizational-wide defaults and sharing rules.
3. Click **Save**.

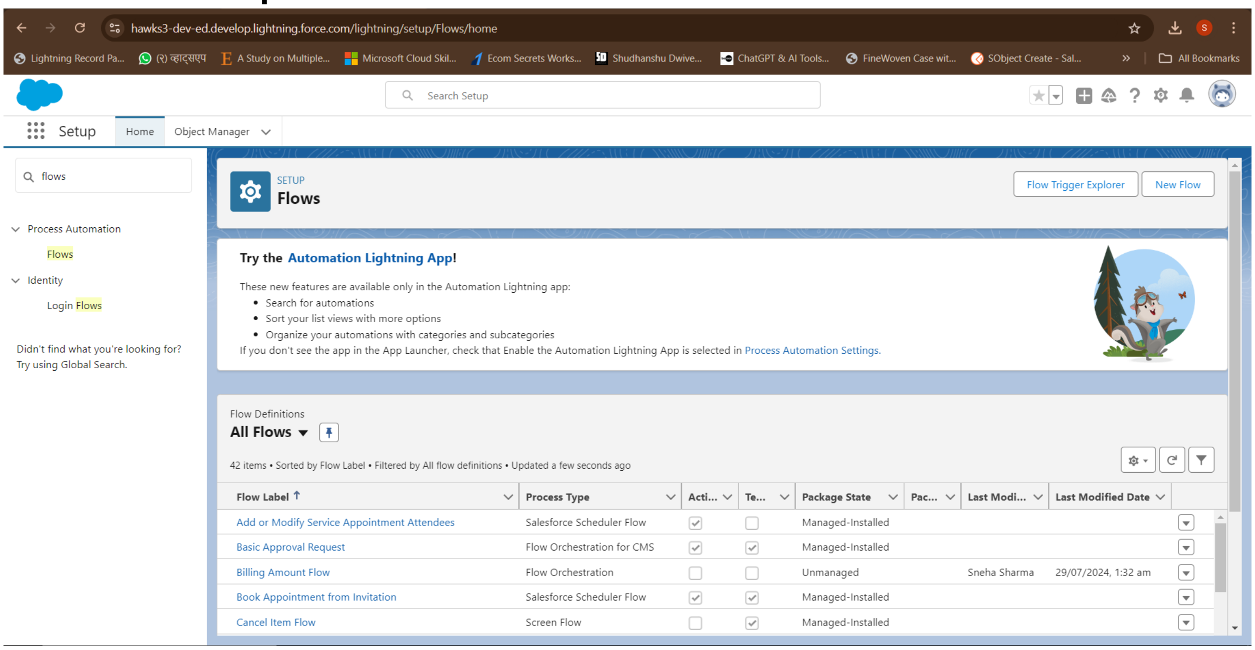
3.10 Flows and Apex

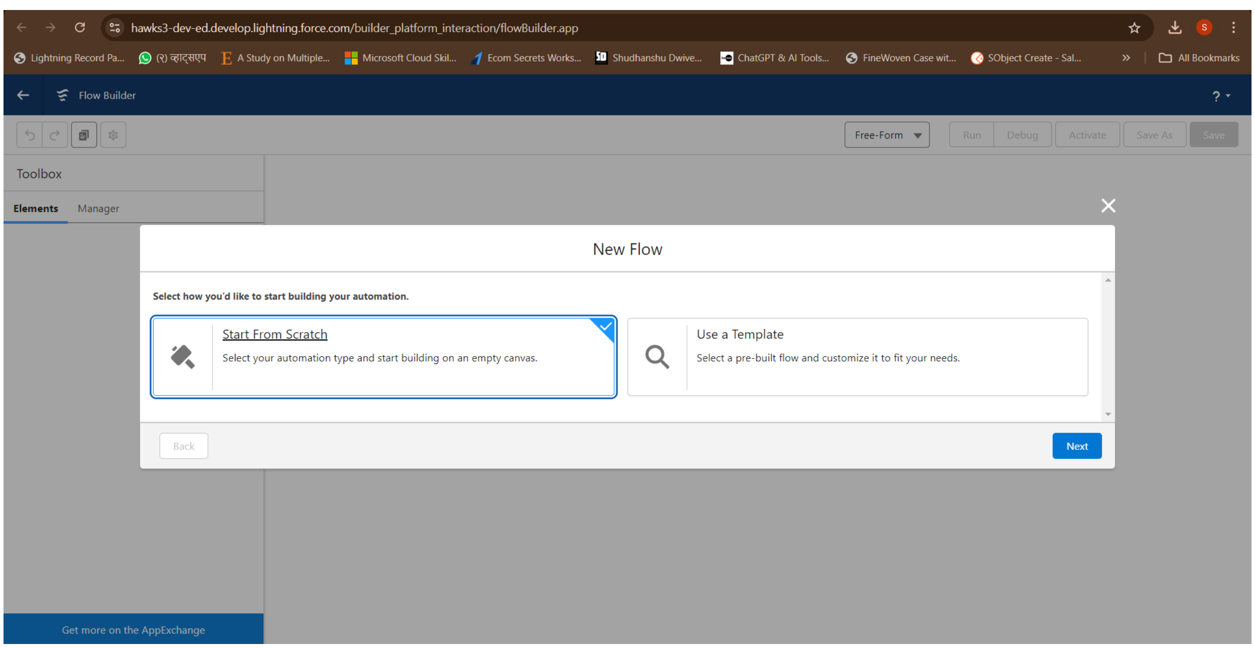
3.10.1 Creating Flows

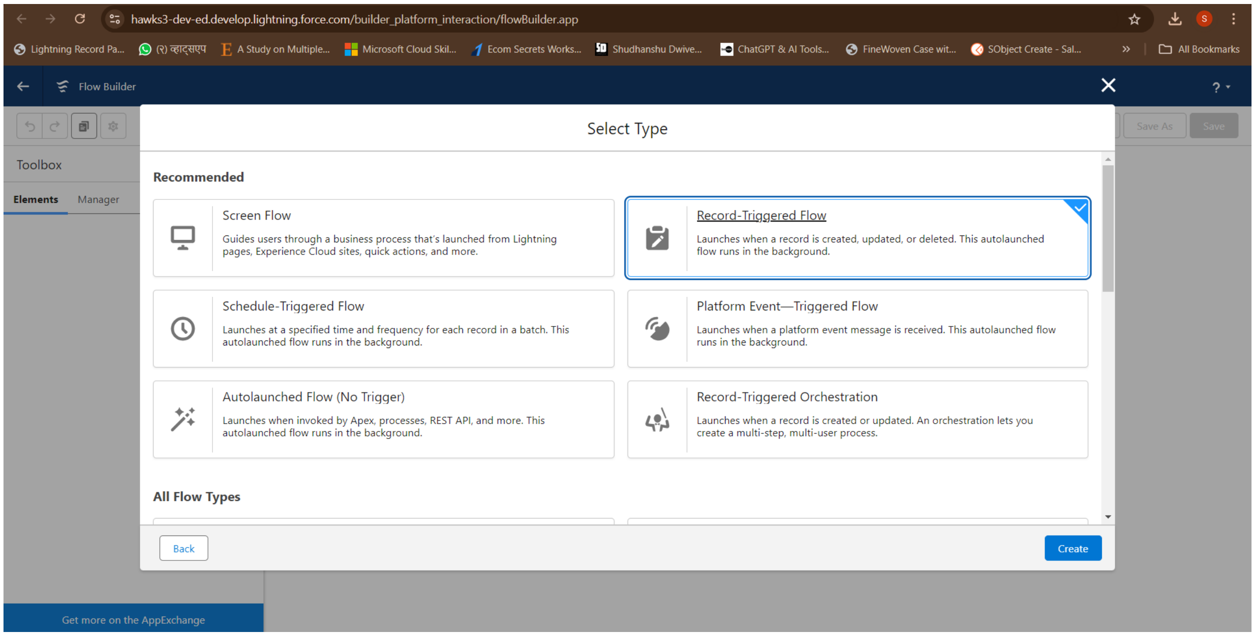
Task: Automate processes using Salesforce Flows.

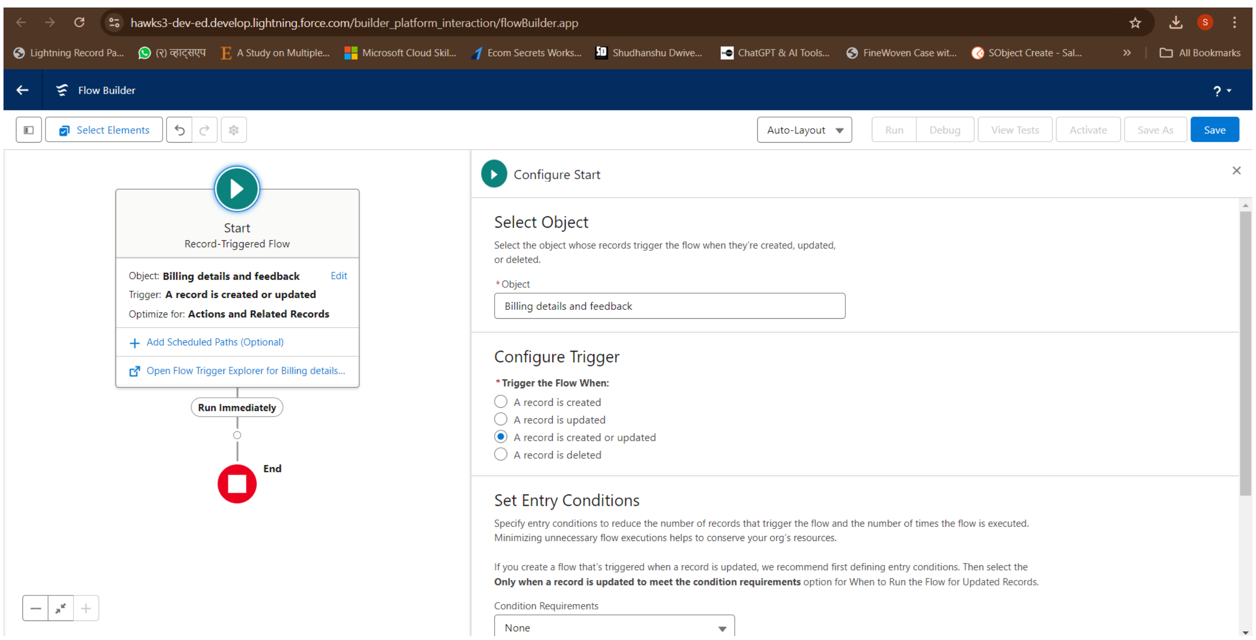
Process:

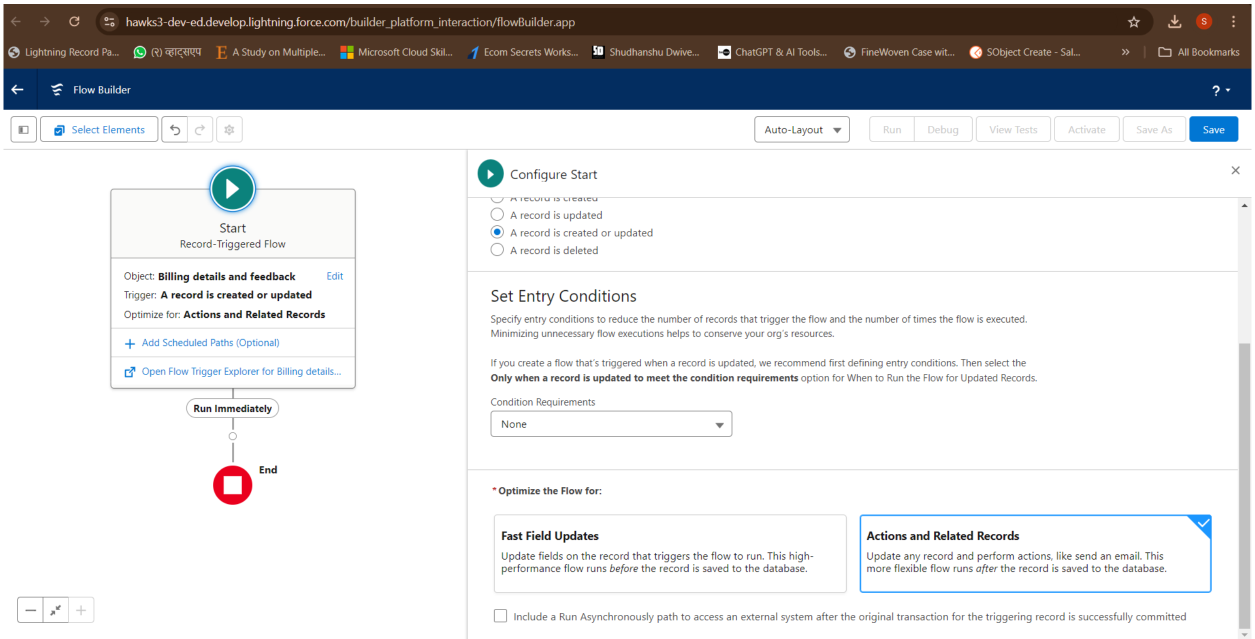
1. Go to **Setup** > **Flows** > **New Flow**.



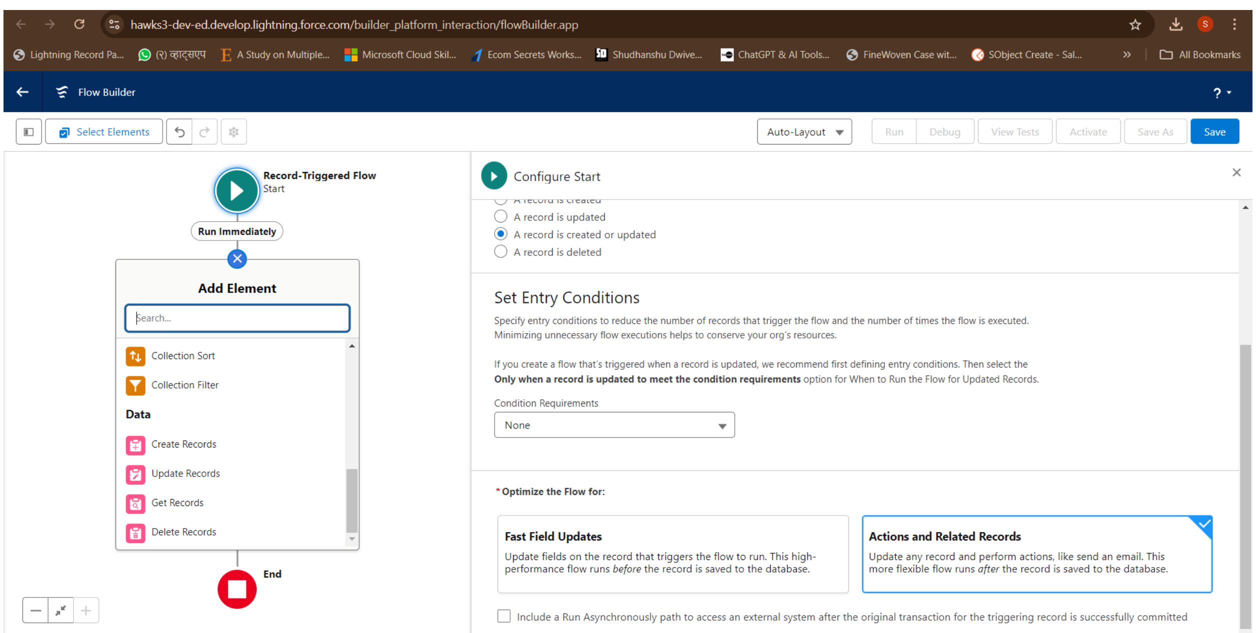



hawks3-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app
Flow Builder
Select Type
Toolbox
Elements
Manager
Recommended
Screen Flow
Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and more.
Record-Triggered Flow
Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.
Schedule-Triggered Flow
Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.
Platform Event—Triggered Flow
Launches when a platform event message is received. This autolaunched flow runs in the background.
Autolaunched Flow (No Trigger)
Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.
Record-Triggered Orchestration
Launches when a record is created or updated. An orchestration lets you create a multi-step, multi-user process.
All Flow Types
Back
Create
Get more on the AppExchange

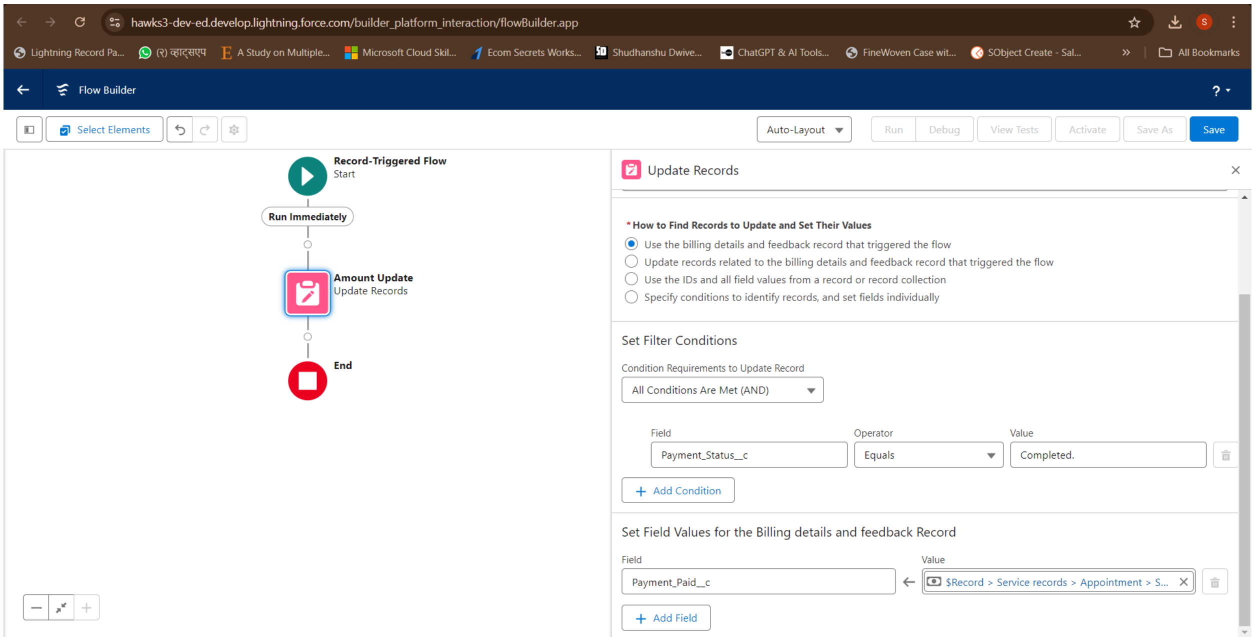

hawks3-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app
Flow Builder
Select Elements
Auto-Layout
Run
Debug
View Tests
Activate
Save As
Save
Start
Record-Triggered Flow
Object: Billing details and feedback
Edit
Trigger: A record is created or updated
Optimize for: Actions and Related Records
Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Billing details...
Run Immediately
End
Configure Start
Select Object
Select the object whose records trigger the flow when they're created, updated, or deleted.
* Object
Billing details and feedback
Configure Trigger
* Trigger the Flow When:
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

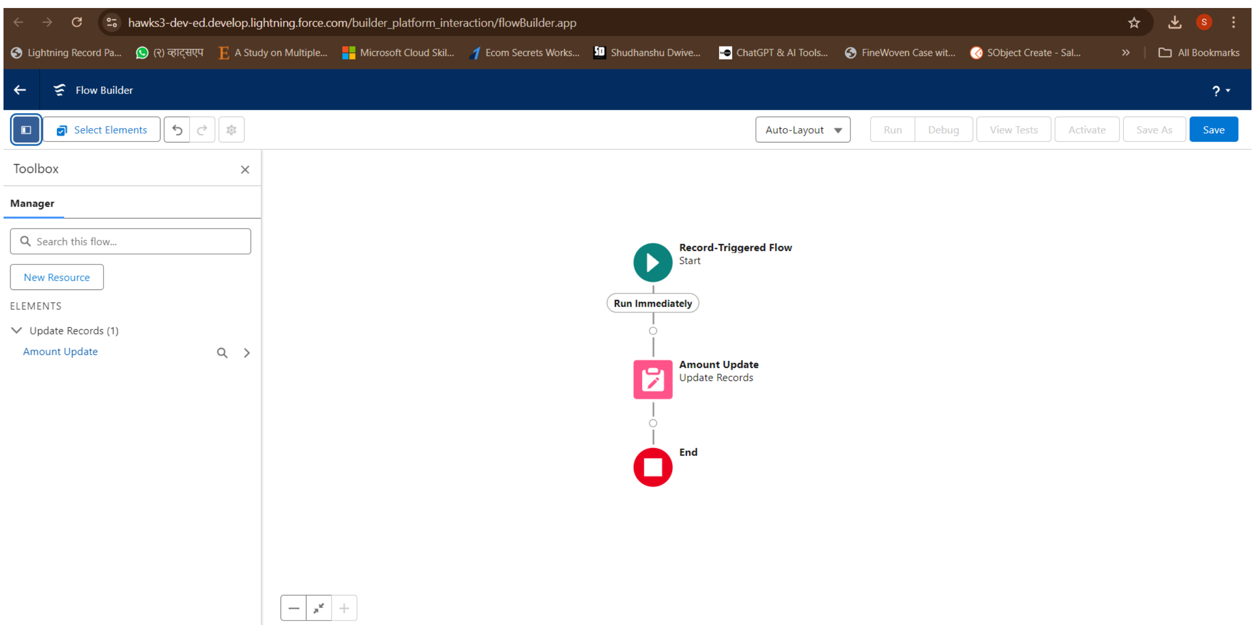


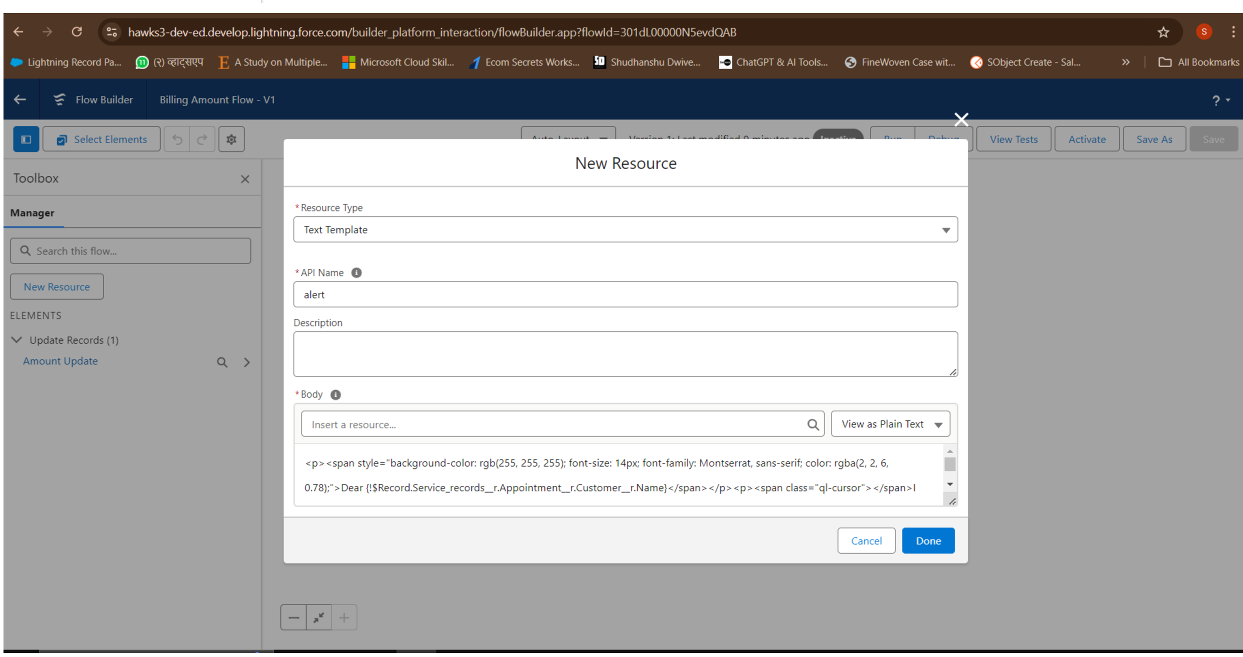
Flow Builder
Select Elements
Auto-Layout
Run
Debug
View Tests
Activate
Save As
Save
Start
Record-Triggered Flow
Object: Billing details and feedback
Edit
Trigger: A record is created or updated
Optimize for: Actions and Related Records
Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Billing details...
Run Immediately
End
Configure Start
A record is 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

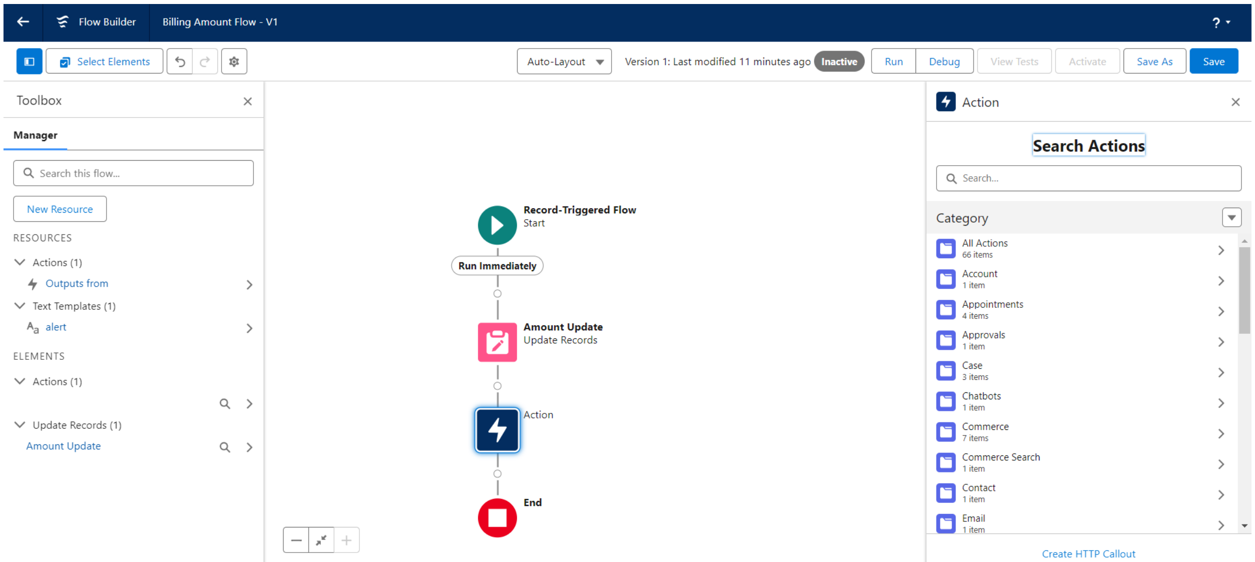


Flow Builder
Select Elements
Auto-Layout
Run
Debug
View Tests
Activate
Save As
Save
Record-Triggered Flow
Start
Run Immediately
Add Element
Search...
Collection Sort
Collection Filter
Data
Create Records
Update Records
Get Records
Delete Records
End
Configure Start
A record is updated
A record is created 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

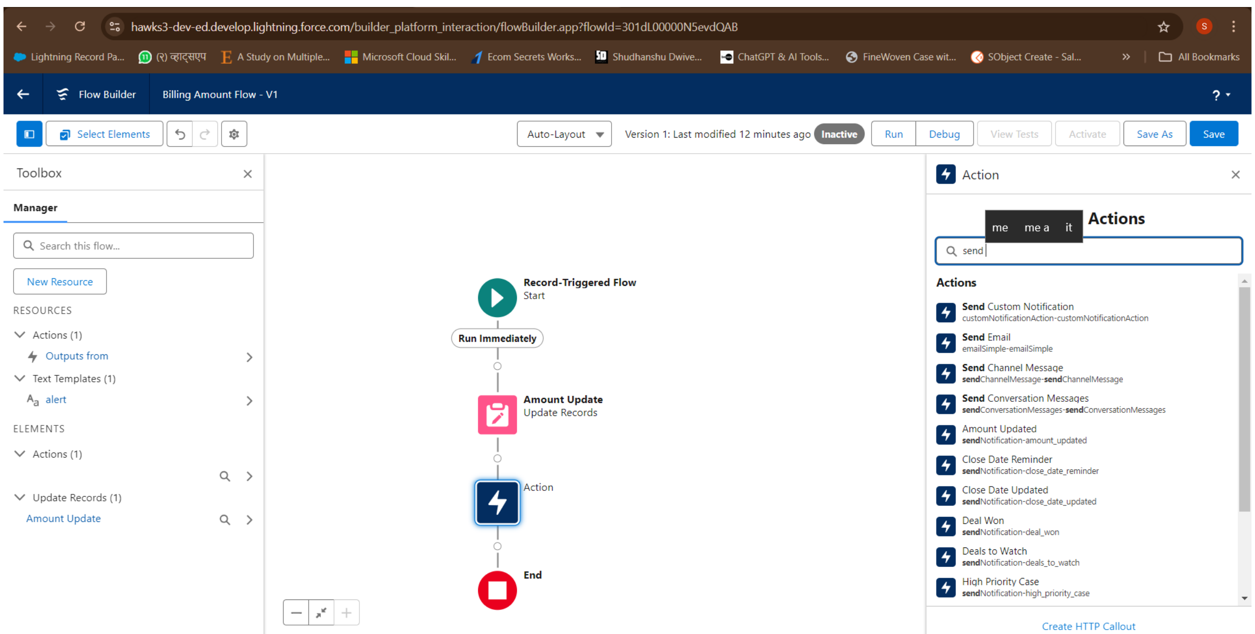

hawks3-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app
Flow Builder
Select Elements
Auto-Layout
Run
Debug
View Tests
Activate
Save As
Save
Record-Triggered Flow
Start
Run Immediately
Amount Update
Update Records
End
Update Records
* How to Find Records to Update and Set Their Values
Use the billing details and feedback record that triggered the flow
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
Operator
Value
Payment_Status__c
Equals
Completed.
Add Condition
Set Field Values for the Billing details and feedback Record
Field
Value
Payment_Paid__c
$Record > Service records > Appointment > S...
Add Field


hawks3-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app
Flow Builder
Select Elements
Auto-Layout
Run
Debug
View Tests
Activate
Save As
Save
Toolbox
Manager
Search this flow...
New Resource
ELEMENTS
Update Records (1)
Amount Update
Record-Triggered Flow
Start
Run Immediately
Amount Update
Update Records
End

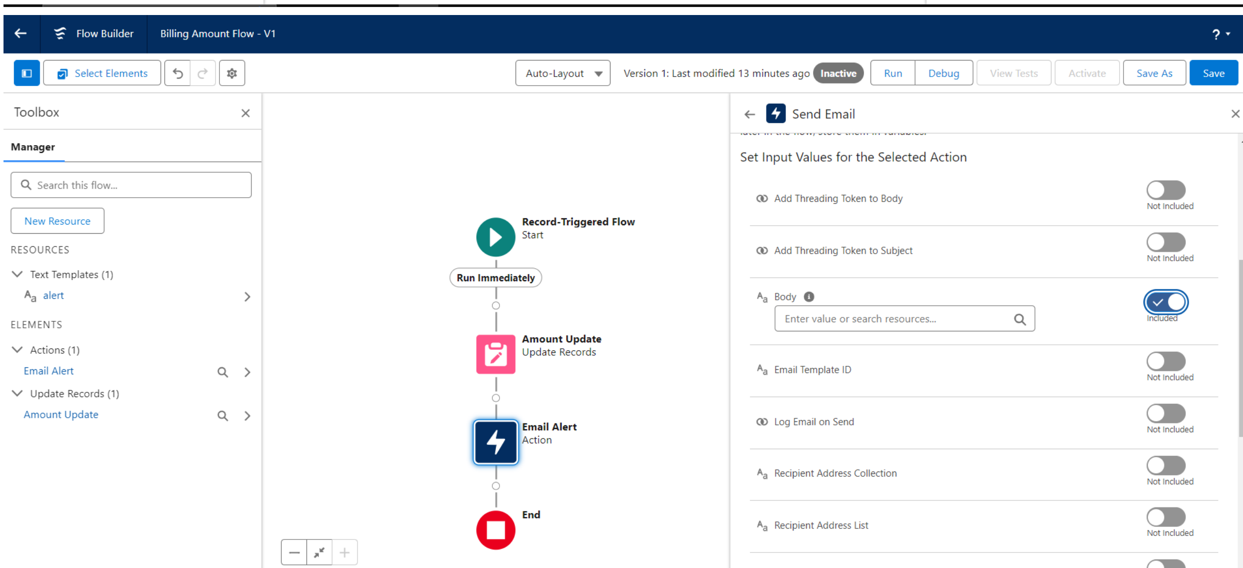

hawks3-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301dL00000N5evdQAB
Flow Builder
Billing Amount Flow - V1
Toolbox
Manager
Search this flow...
New Resource
ELEMENTS
Update Records (1)
Amount Update
New Resource
* Resource Type
Text Template
* API Name
alert
Description
* Body
Insert a resource...
View as Plain Text
<p><span style="background-color: rgb(255, 255, 255); font-size: 14px; font-family: Montserrat, sans-serif; color: rgba(2, 2, 6,
0.78);">Dear {!$Record.Service_records__r.Appointment__r.Customer__r.Name}</p><p>I
Cancel
Done



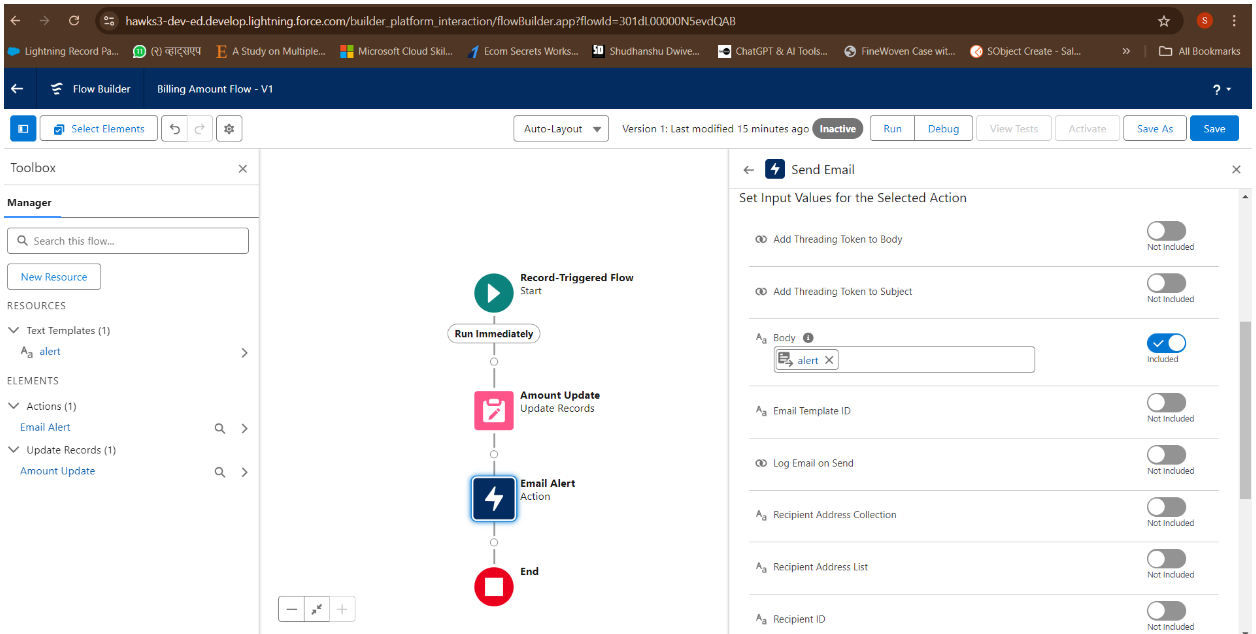
Flow Builder
Billing Amount Flow - V1
Select Elements
Auto-Layout
Version 1: Last modified 11 minutes ago
Inactive
Run
Debug
View Tests
Activate
Save As
Save
Toolbox
Manager
Search this flow...
New Resource
RESOURCES
Actions (1)
Outputs from
Text Templates (1)
alert
ELEMENTS
Actions (1)
Update Records (1)
Amount Update
Record-Triggered Flow
Start
Run Immediately
Amount Update
Update Records
Action
End
Action
Search Actions
Search...
Category
All Actions
66 items
Account
1 item
Appointments
4 items
Approvals
1 item
Case
3 items
Chatbots
1 item
Commerce
7 items
Commerce Search
1 item
Contact
1 item
Email
1 item
Create HTTP Callout

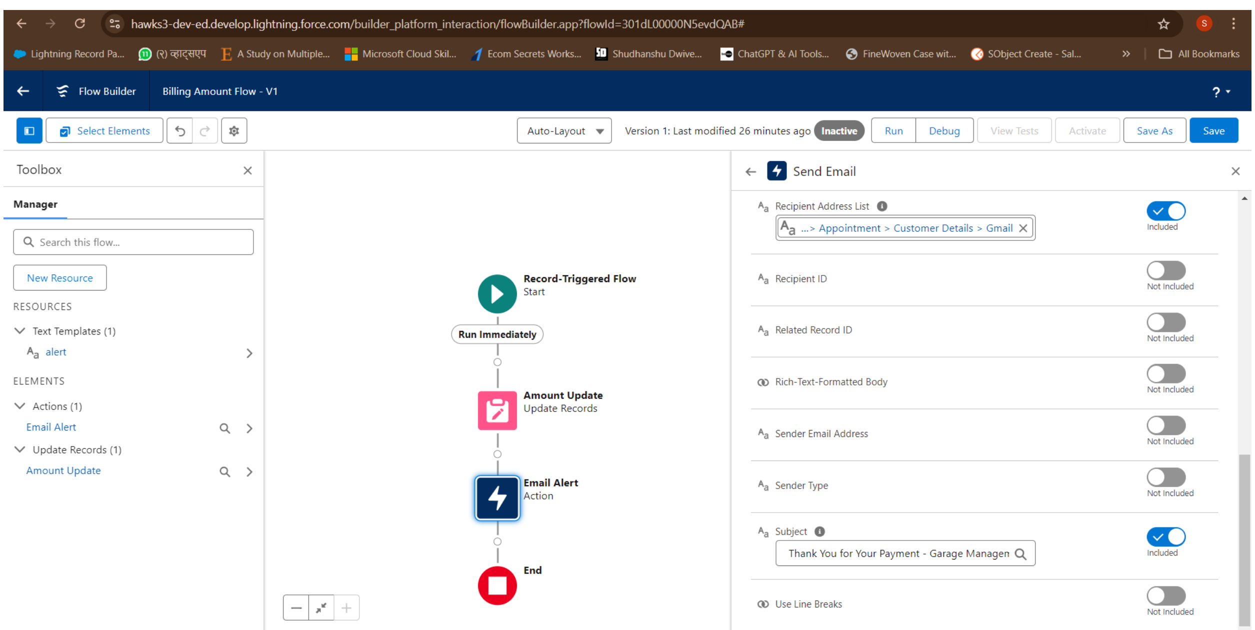


hawks3-dev-ed.develop.lightning.force.com/builder_platform_interaction/flowBuilder.app?flowId=301dL00000N5evdQAB
Flow Builder
Billing Amount Flow - V1
Version 1: Last modified 12 minutes ago
Inactive
Toolbox
Action
Actions
send
Send Custom Notification
customNotificationAction-customNotificationAction
Send Email
emailSimple-emailSimple
Send Channel Message
sendChannelMessage-sendChannelMessage
Send Conversation Messages
sendConversationMessages-sendConversationMessages
Amount Updated
sendNotification-amount_updated
Close Date Reminder
sendNotification-close_date_reminder
Close Date Updated
sendNotification-close_date_updated
Deal Won
sendNotification-deal_won
Deals to Watch
sendNotification-deals_to_watch
High Priority Case
sendNotification-high_priority_case
Create HTTP Callout



Flow Builder
Billing Amount Flow - V1
Version 1: Last modified 13 minutes ago
Inactive
Toolbox
Manager
RESOURCES
Text Templates (1)
alert
ELEMENTS
Actions (1)
Email Alert
Update Records (1)
Amount Update
Record-Triggered Flow
Start
Run Immediately
Amount Update
Update Records
Email Alert
Action
End
Send Email
Set Input Values for the Selected Action
Add Threading Token to Body
Not Included
Add Threading Token to Subject
Not Included
Body
Enter value or search resources...
Included
Email Template ID
Not Included
Log Email on Send
Not Included
Recipient Address Collection
Not Included
Recipient Address List
Not Included
Recipient ID





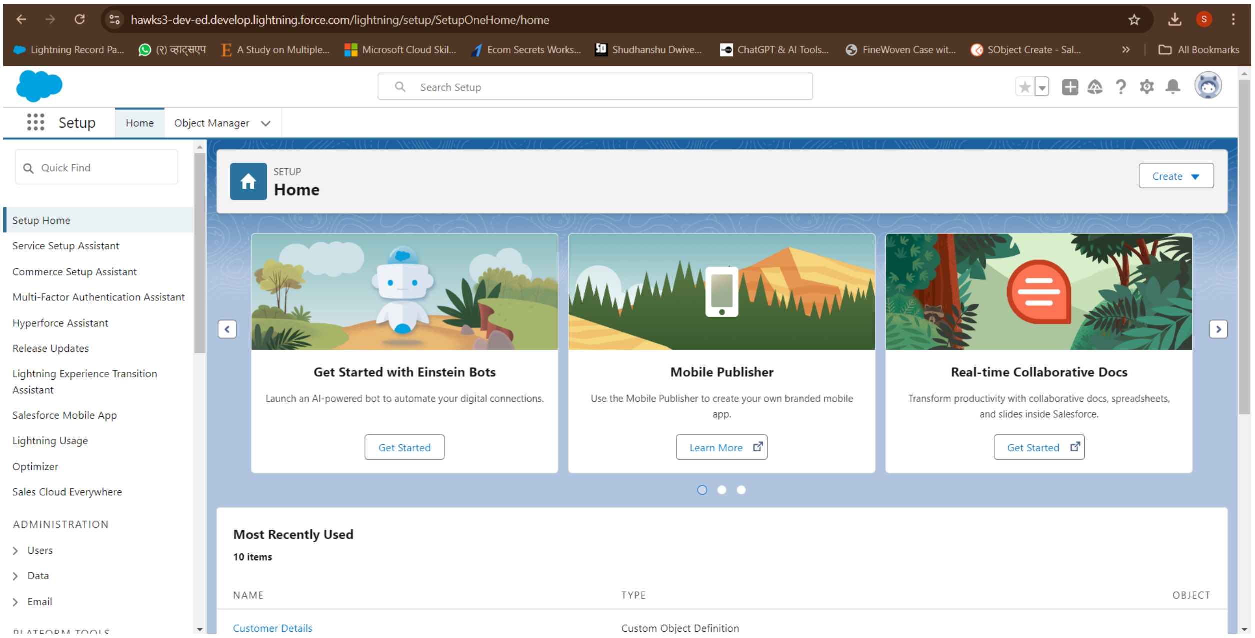
2. Create and configure flows for tasks like sending notifications or updating records.
3. Click **Save**.

3.10.2 Creating Apex Triggers and Handlers

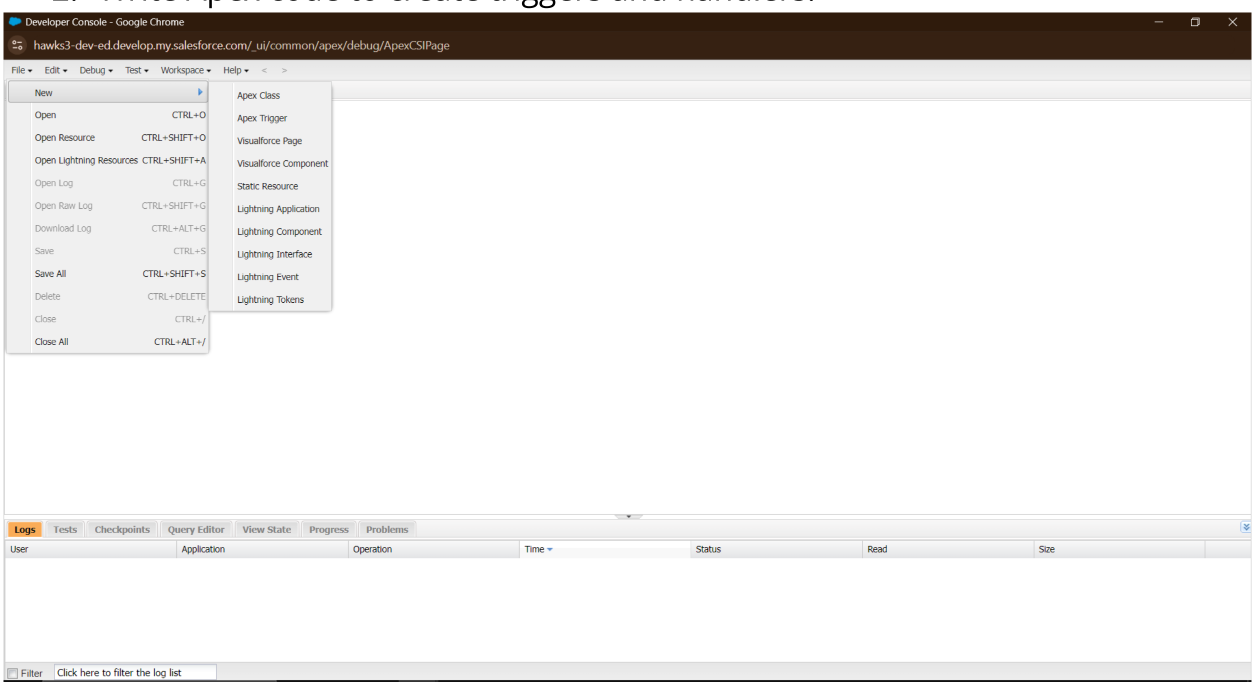
Task: Write Apex triggers for custom logic.

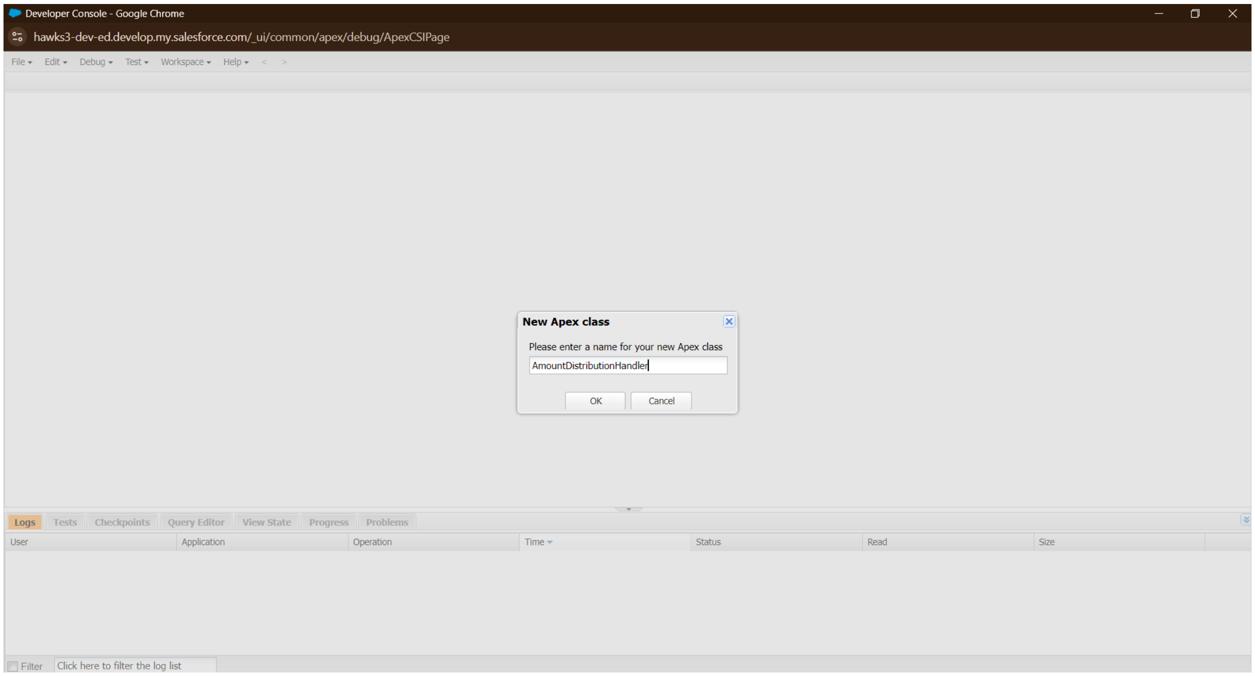
Process:

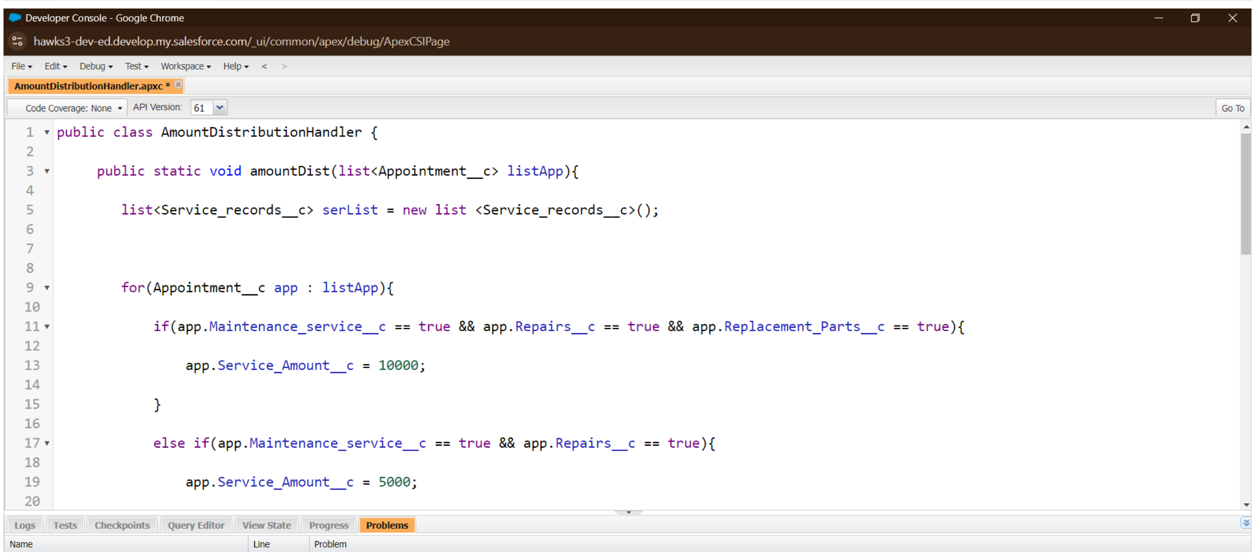
1. Open **Developer Console** in Salesforce by clicking on gear icon.

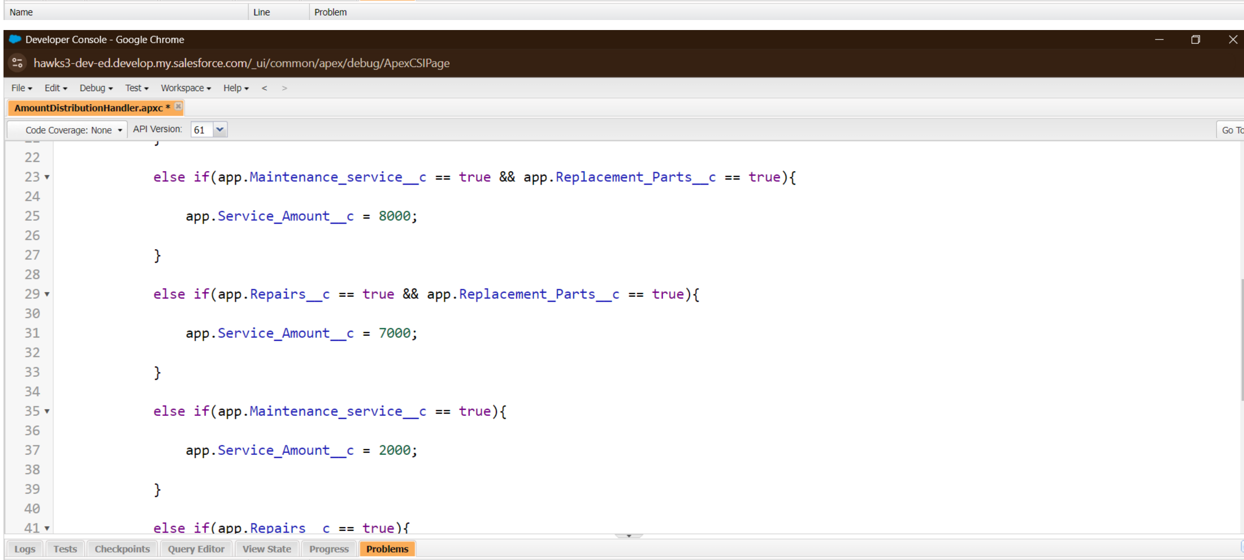


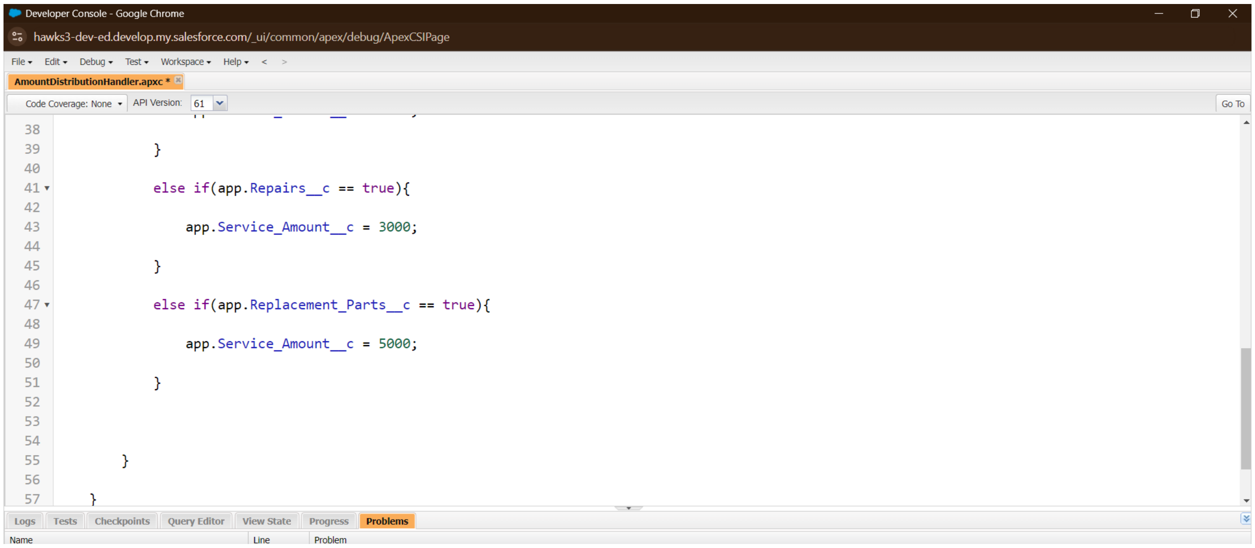
2. Write Apex code to create triggers and handlers.



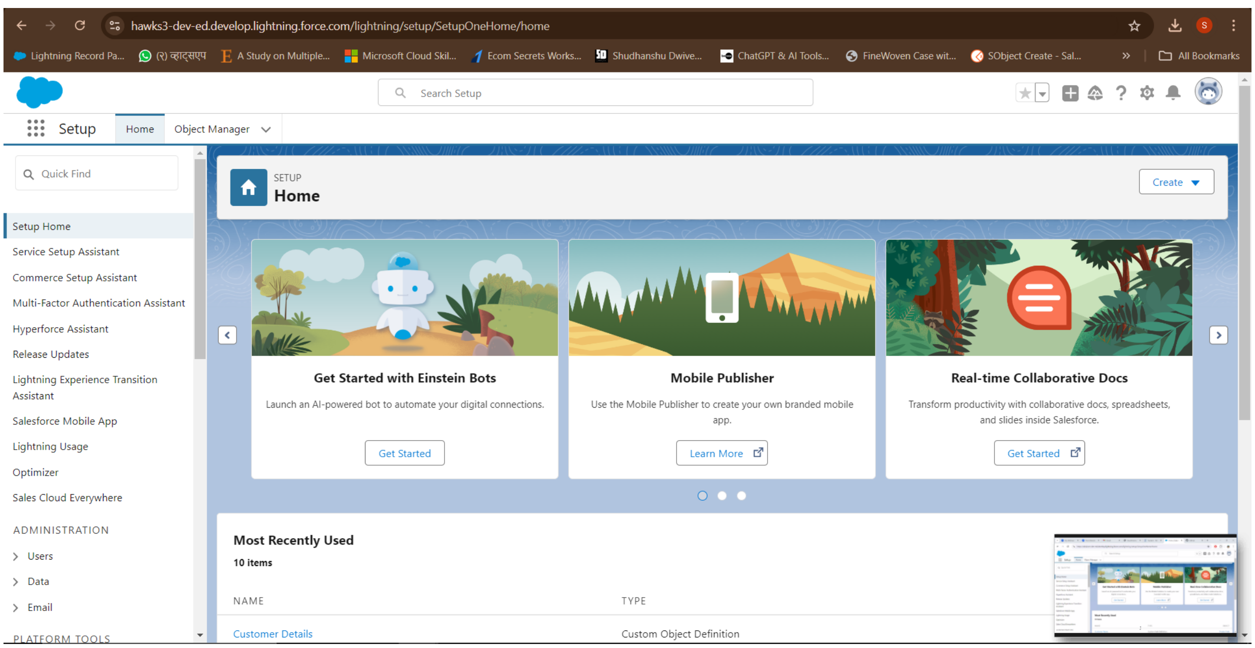

Developer Console - Google Chrome
hawks3-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
File Edit Debug Test Workspace Help
New Apex class
Please enter a name for your new Apex class
AmountDistributionHandler
OK
Cancel
Logs Tests Checkpoints Query Editor View State Progress Problems
User Application Operation Time Status Read Size
Filter Click here to filter the log list

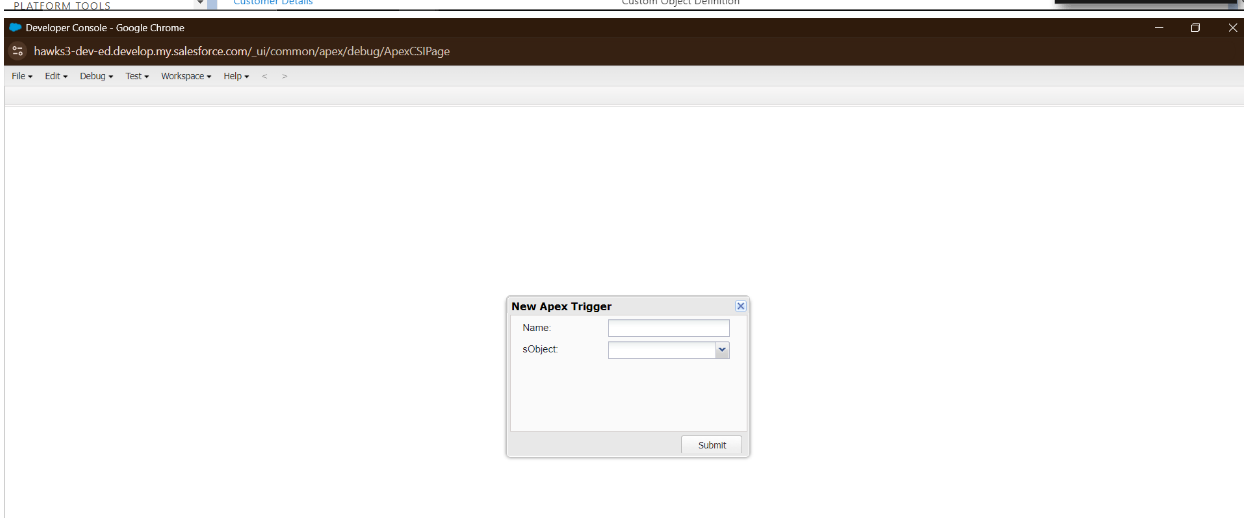

Developer Console - Google Chrome
hawks3-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
File Edit Debug Test Workspace Help
AmountDistributionHandler.apxc *
Code Coverage: None API Version: 61 Go To
public class AmountDistributionHandler {
public static void amountDist(list<Appointment__c> listApp){
list<Service_records__c> serList = new list <Service_records__c>();
for(Appointment__c app : listApp){
if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){
app.Service_Amount__c = 10000;
}
else if(app.Maintenance_service__c == true && app.Repairs__c == true){
app.Service_Amount__c = 5000;
Logs Tests Checkpoints Query Editor View State Progress Problems
Name Line Problem

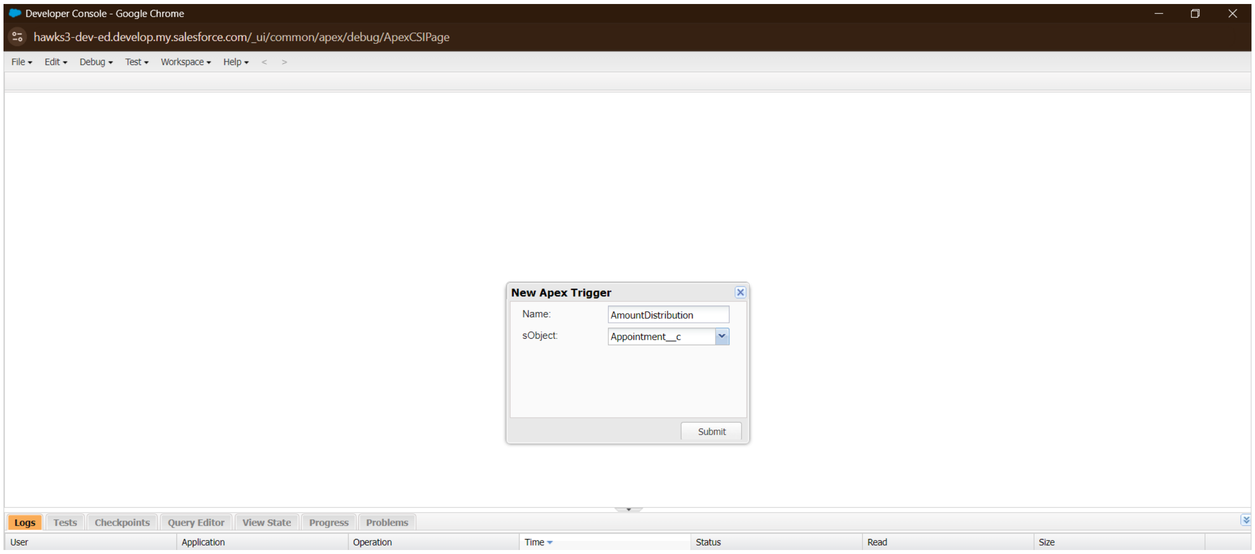

Developer Console - Google Chrome
hawks3-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage
File Edit Debug Test Workspace Help
AmountDistributionHandler.apxc *
Code Coverage: None API Version: 61 Go To
else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
app.Service_Amount__c = 8000;
}
else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
app.Service_Amount__c = 7000;
}
else if(app.Maintenance_service__c == true){
app.Service_Amount__c = 2000;
}
else if(app.Repairs__c == true){
Logs Tests Checkpoints Query Editor View State Progress Problems
Name Line Problem

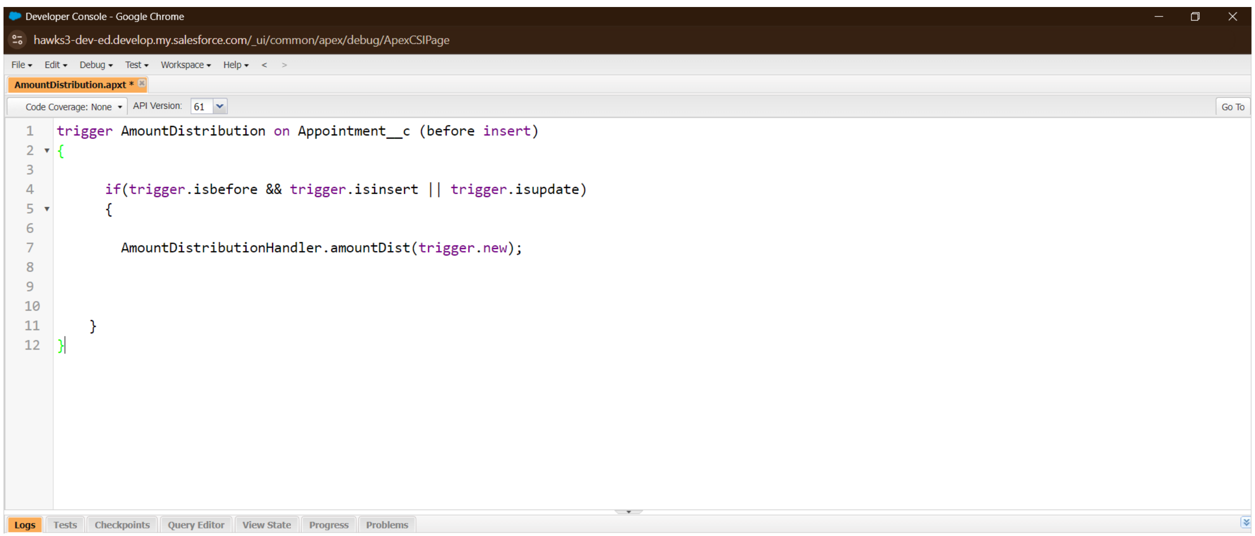


Again return to home page and again click on gear icon and click on developer console.









3. Save and deploy your code.

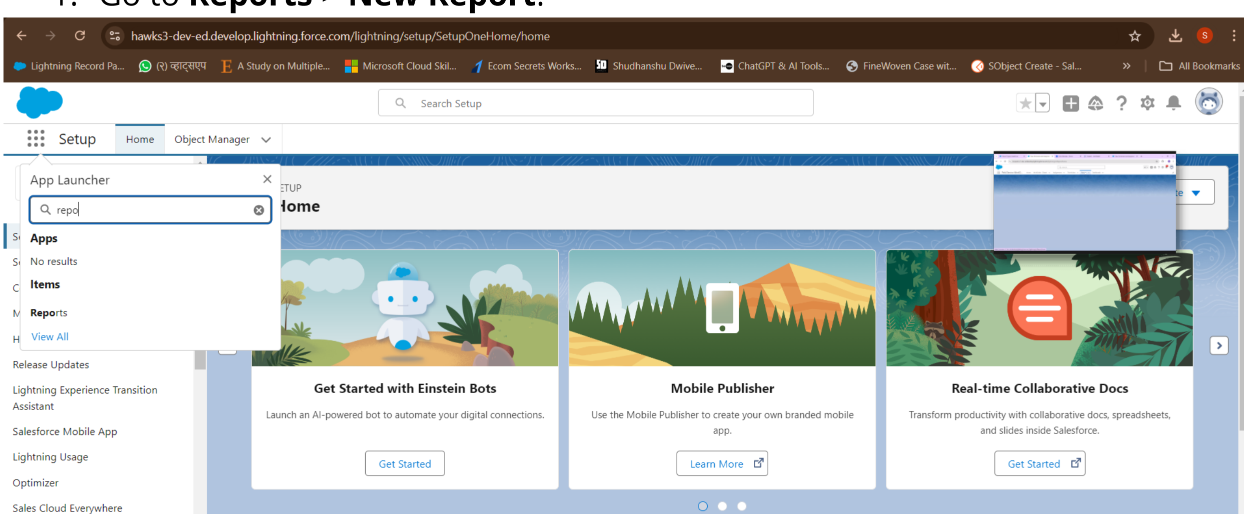
3.11 Reports and Dashboards

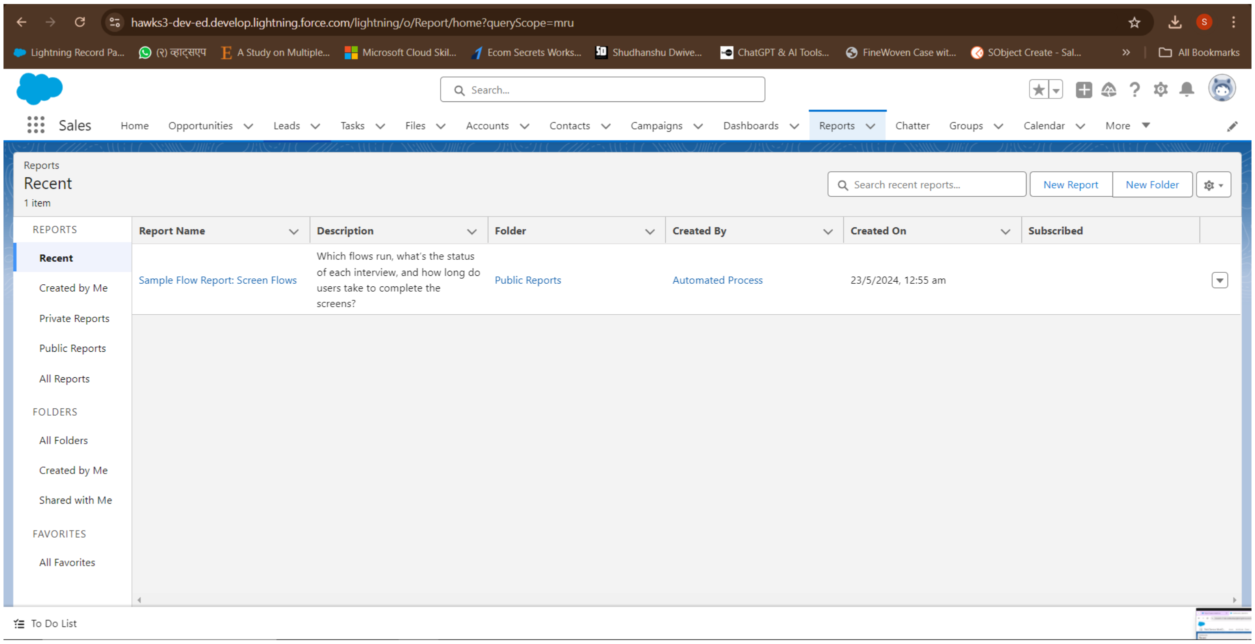
3.11.1 Creating Reports

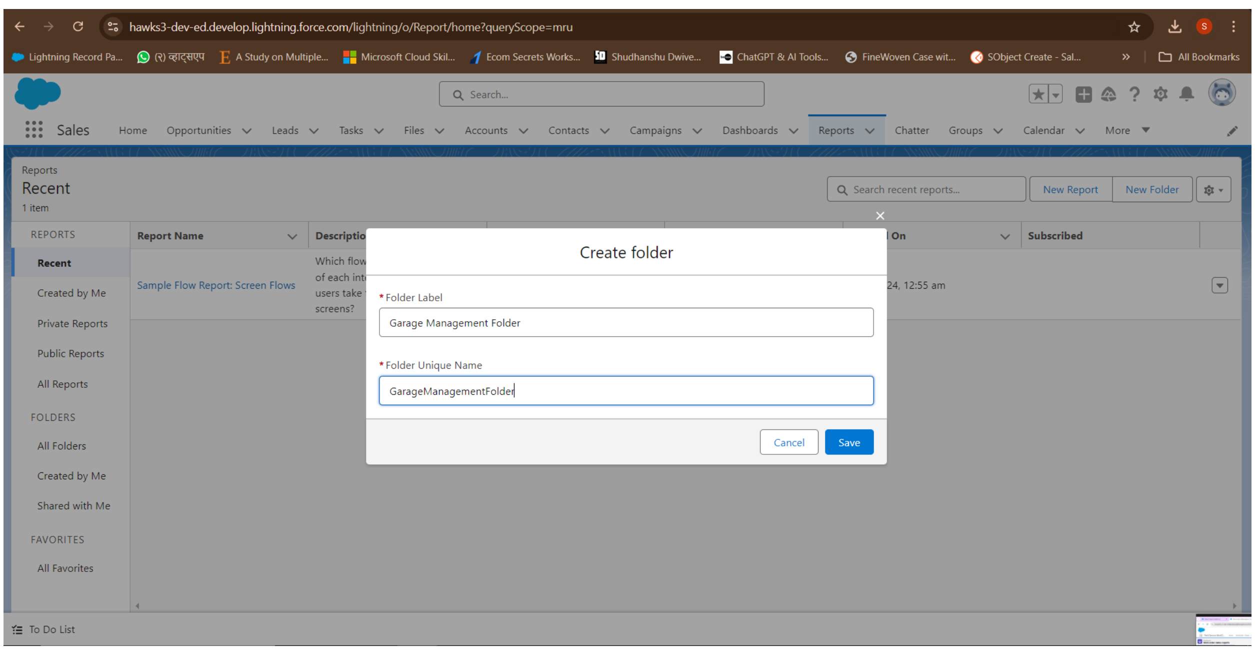
Task: Generate reports for various metrics.

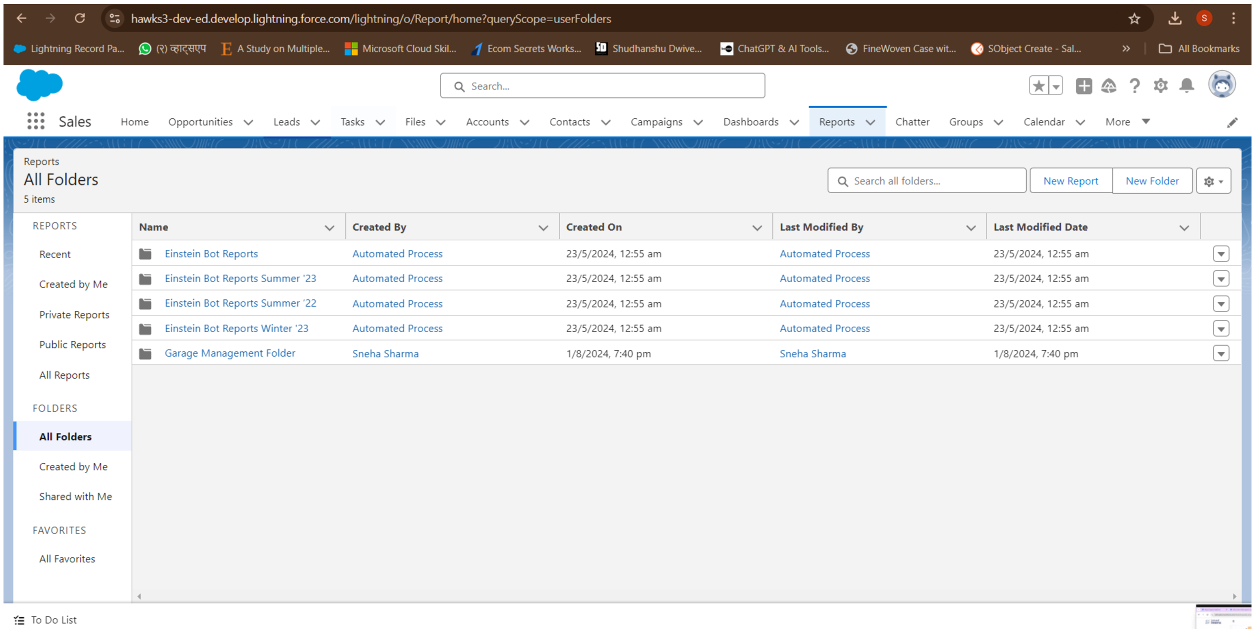
Process:

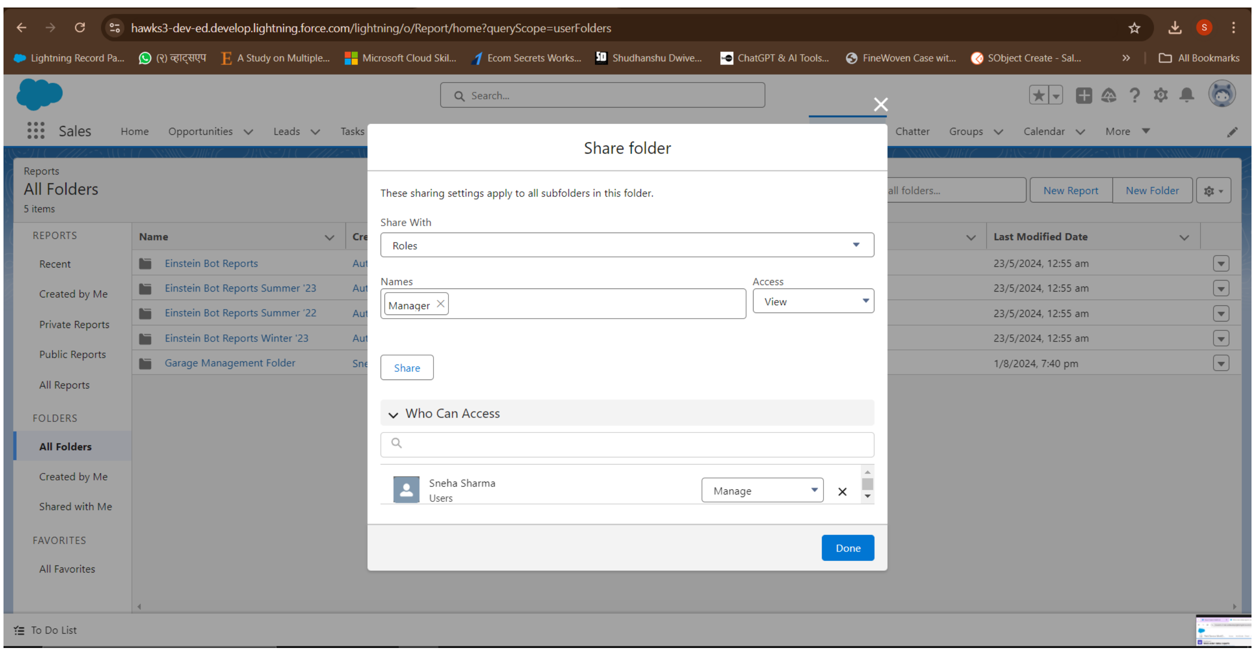
1. Go to **Reports** > **New Report**.

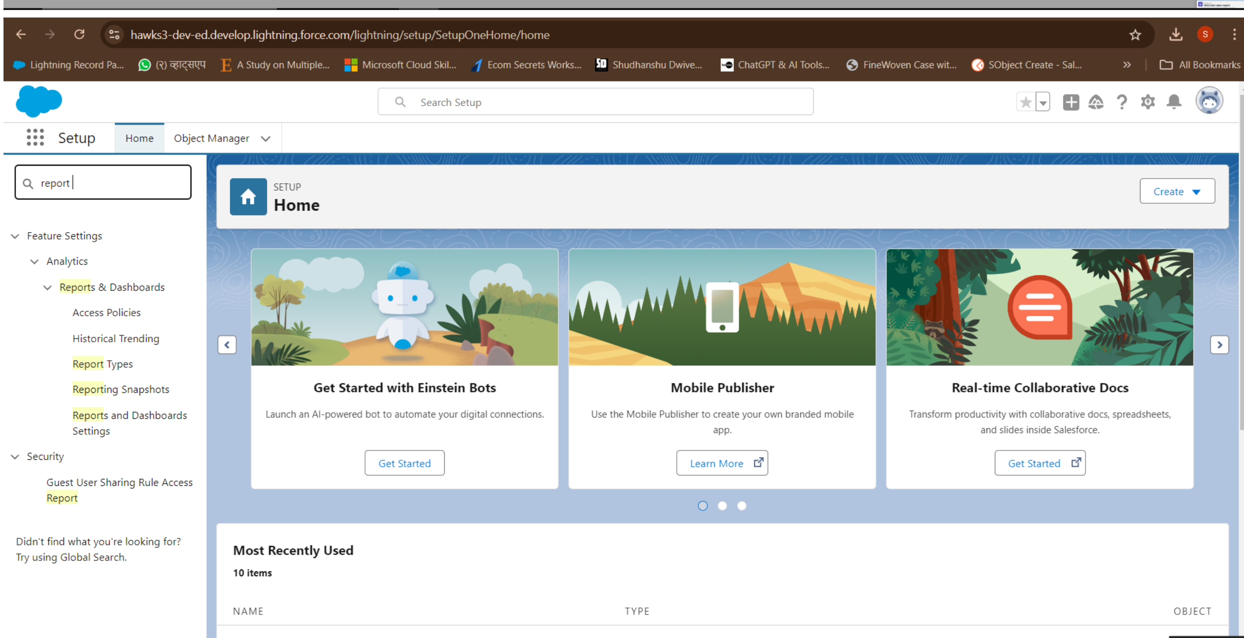



hawks3-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru
Sales
Home
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Campaigns
Dashboards
Reports
Chatter
Groups
Calendar
More
Reports
Recent
1 item
Search recent reports...
New Report
New Folder
REPORTS
Recent
Created by Me
Private Reports
Public Reports
All Reports
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites
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
To Do List

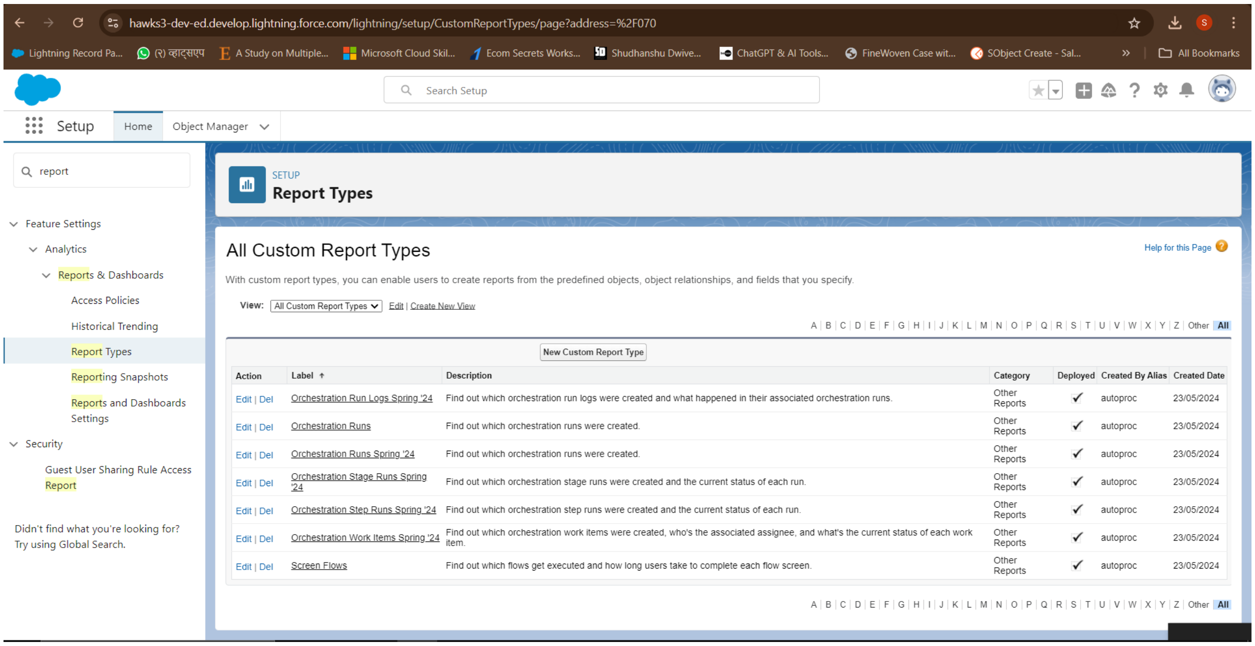

hawks3-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mru
Create folder
* Folder Label
Garage Management Folder
* Folder Unique Name
GarageManagementFolder
Cancel
Save

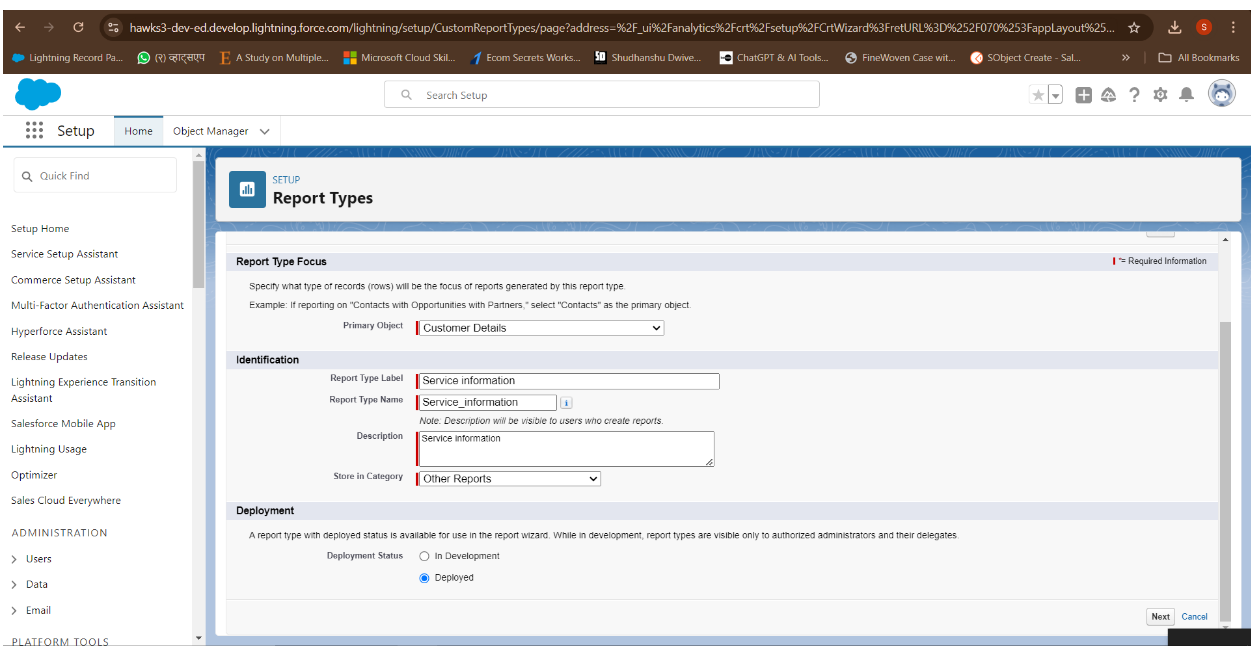

hawks3-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=userFolders
Sales
Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar More
Reports
All Folders
5 items
Search all folders...
New Report
New Folder
REPORTS
Recent
Created by Me
Private Reports
Public Reports
All Reports
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites
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
To Do List

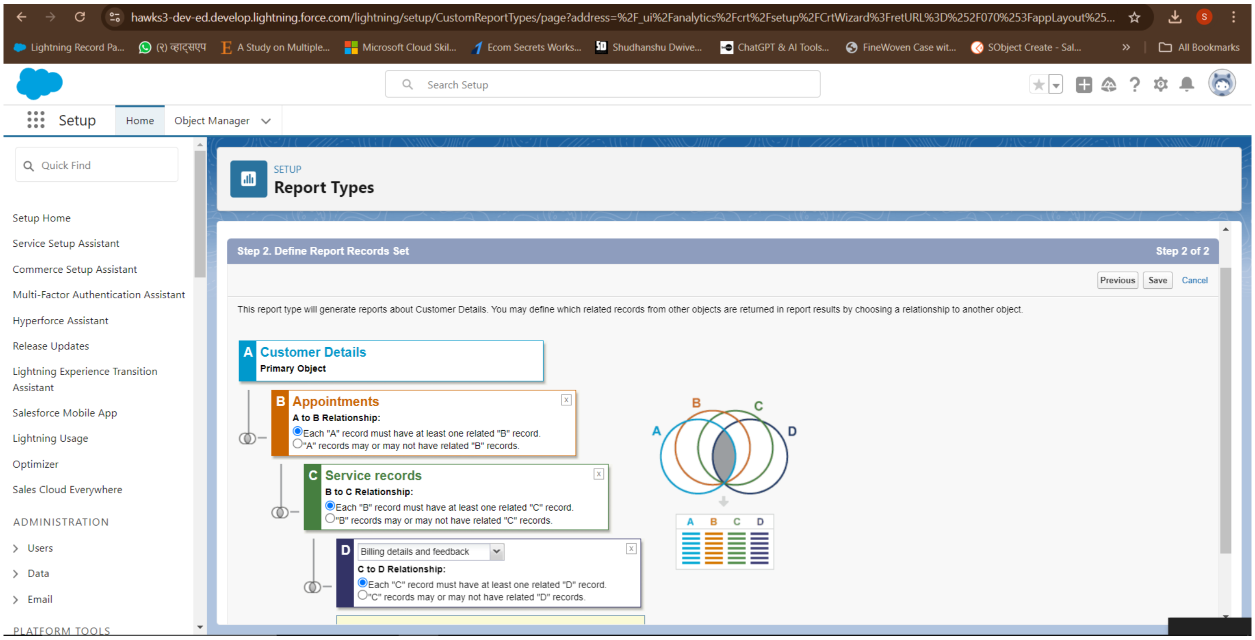

hawks3-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=userFolders
Share folder
These sharing settings apply to all subfolders in this folder.
Share With
Roles
Names
Manager
Access
View
Share
Who Can Access
Sneha Sharma
Users
Manage
Done

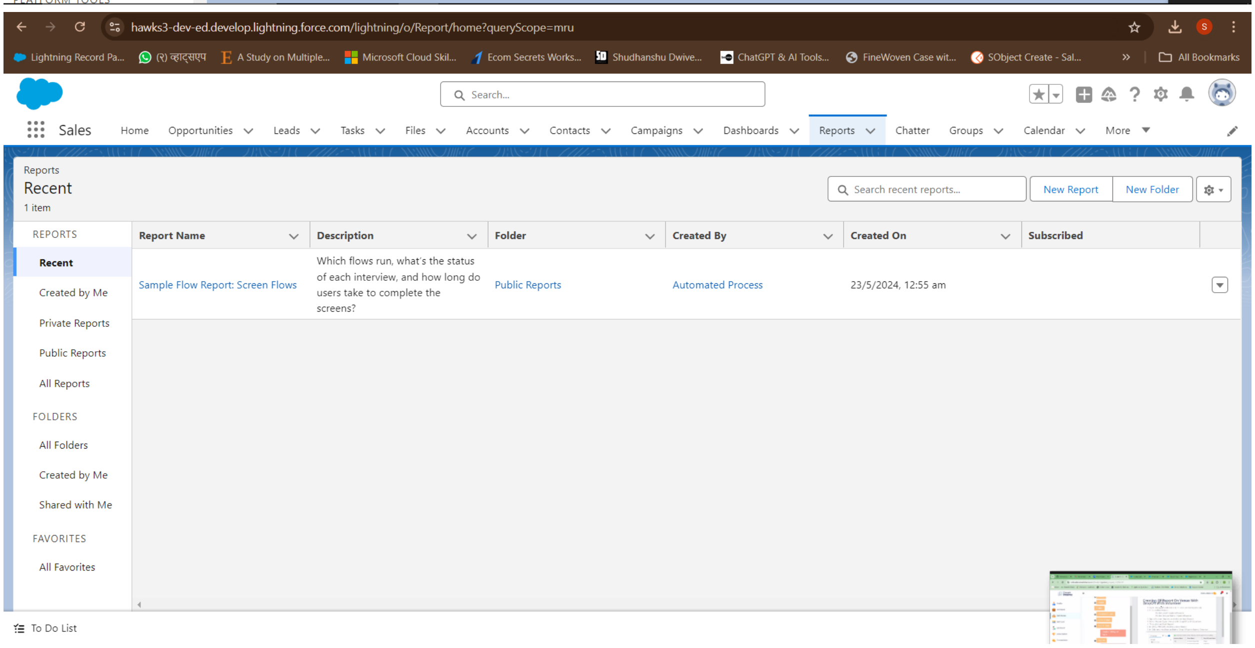

hawks3-dev-ed.develop.lightning.force.com/lightning/setup/SetupOneHome/home
Search Setup
Setup
Home
Object Manager
report
Feature Settings
Analytics
Reports & Dashboards
Access Policies
Historical Trending
Report Types
Reporting Snapshots
Reports and Dashboards Settings
Security
Guest User Sharing Rule Access Report
Didn't find what you're looking for? Try using Global Search.
SETUP
Home
Create
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

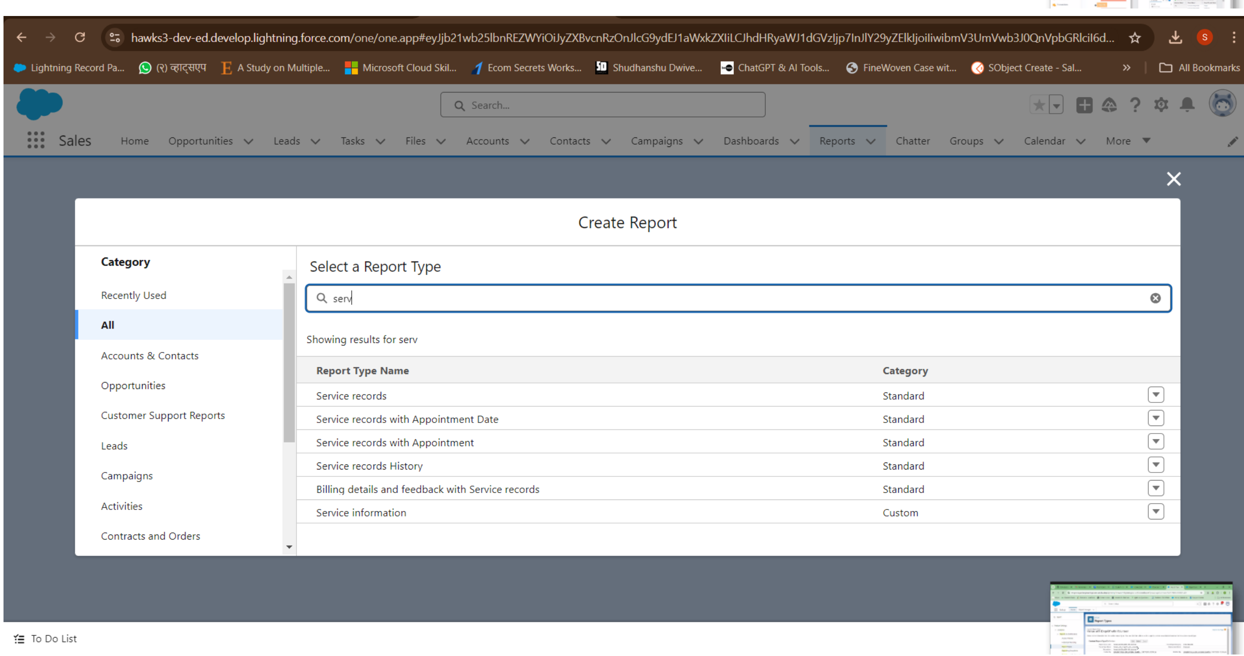
7

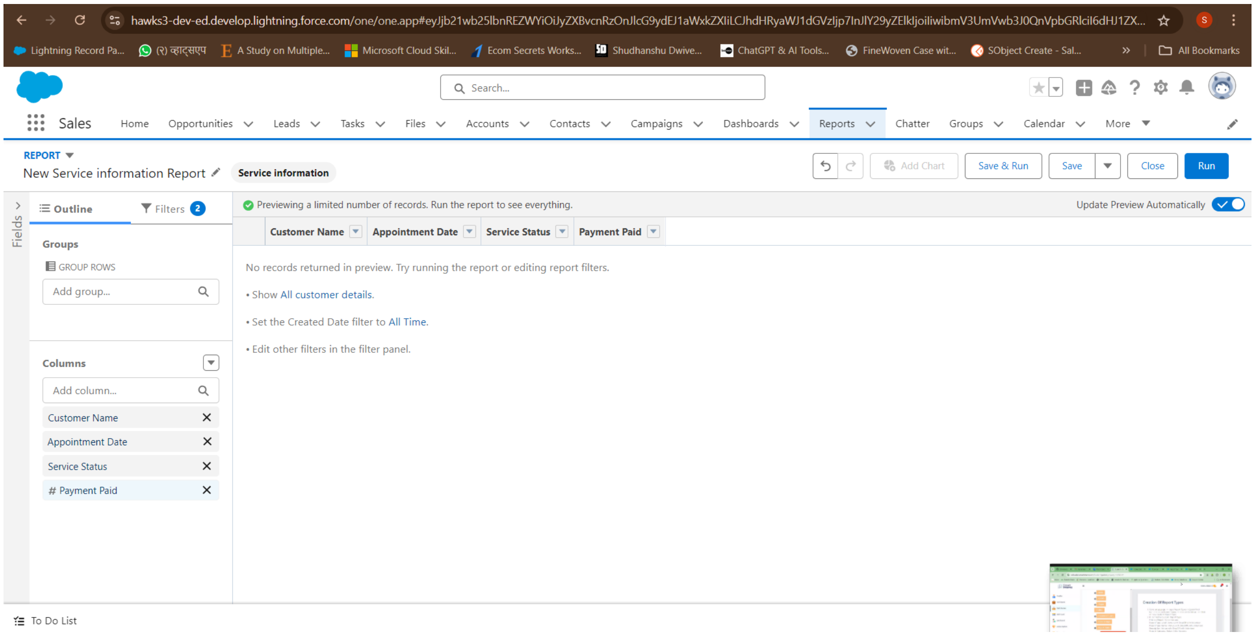

hawks3-dev-ed.develop.lightning.force.com/lightning/setup/CustomReportTypes/page?address=%2F070
Setup
Home
Object Manager
Search Setup
report
Feature Settings
Analytics
Reports & Dashboards
Access Policies
Historical Trending
Report Types
Reporting Snapshots
Reports and Dashboards Settings
Security
Guest User Sharing Rule Access Report
Didn't find what you're looking for? Try using Global Search.
SETUP
Report Types
All Custom Report Types
Help for this Page
With custom report types, you can enable users to create reports from the predefined objects, object relationships, and fields that you specify.
View: All Custom Report Types Edit | Create New View
New Custom Report Type
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
autoproc
23/05/2024
Orchestration Runs
Find out which orchestration runs were created.
Orchestration Runs Spring '24
Orchestration Stage Runs Spring '24
Find out which orchestration stage runs were created and the current status of each run.
Orchestration Step Runs Spring '24
Find out which orchestration step runs were created and the current status of each run.
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.
Screen Flows
Find out which flows get executed and how long users take to complete each flow screen.

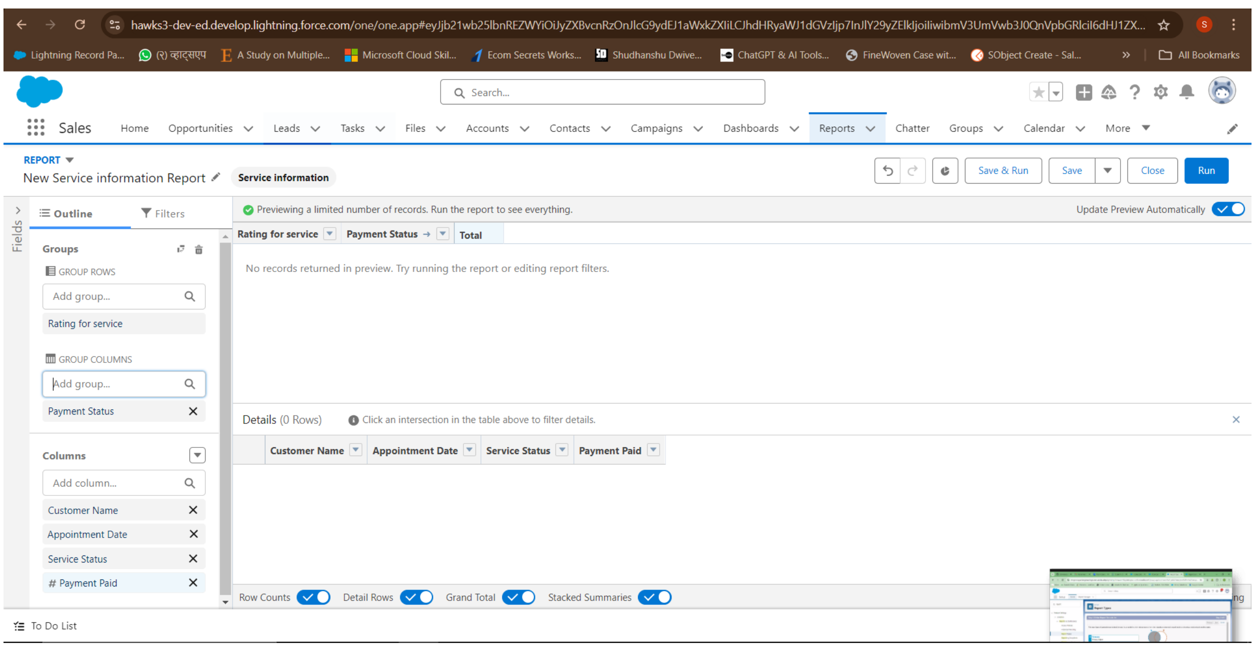

hawks3-dev-ed.develop.lightning.force.com/lightning/setup/CustomReportTypes/page?address=%2F_ui%2Fanalytics%2Frct%2Fsetup%2FCrtWizard%3FretURL%3D%252F070%253FappLayout%25...
Setup
Home
Object Manager
Search Setup
Quick Find
Setup Home
Service Setup Assistant
Commerce Setup Assistant
Multi-Factor Authentication Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
Sales Cloud Everywhere
ADMINISTRATION
Users
Data
Email
PLATFORM TOOLS
SETUP
Report Types
Report Type Focus
= Required Information
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
Note: Description will be visible to users who create reports.
Description
Service information
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

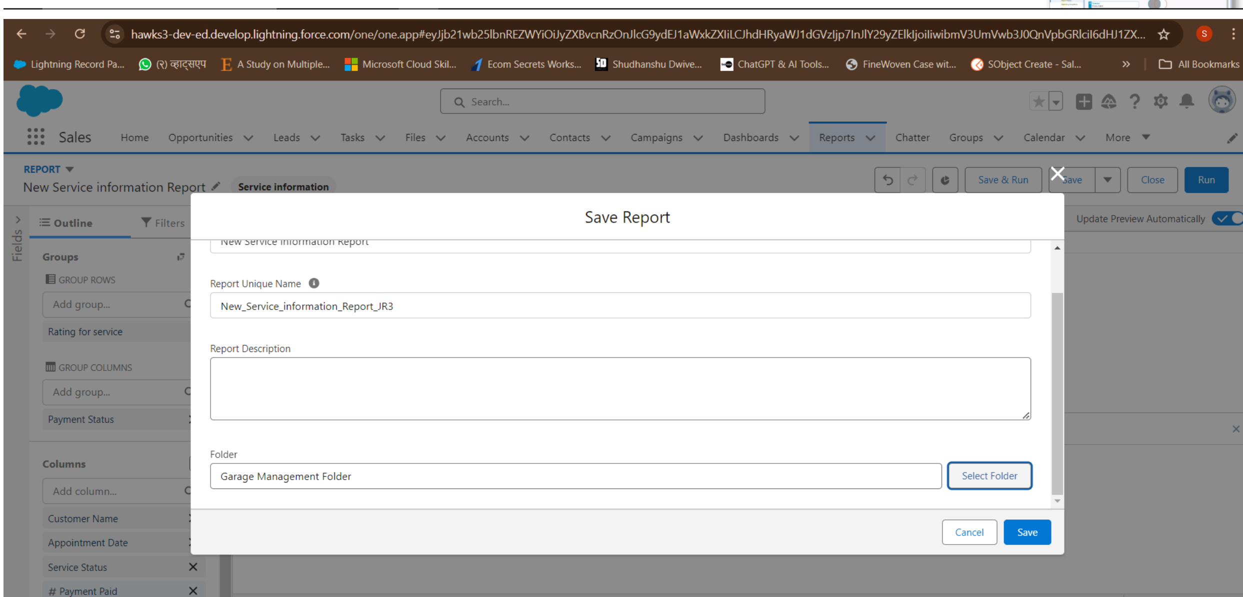

SETUP
Report Types
Step 2. Define Report Records Set
Step 2 of 2
Previous
Save
Cancel
This report type will generate reports about Customer Details. You may define which related records from other objects are returned in report results by choosing a relationship to another object.
A Customer Details
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.

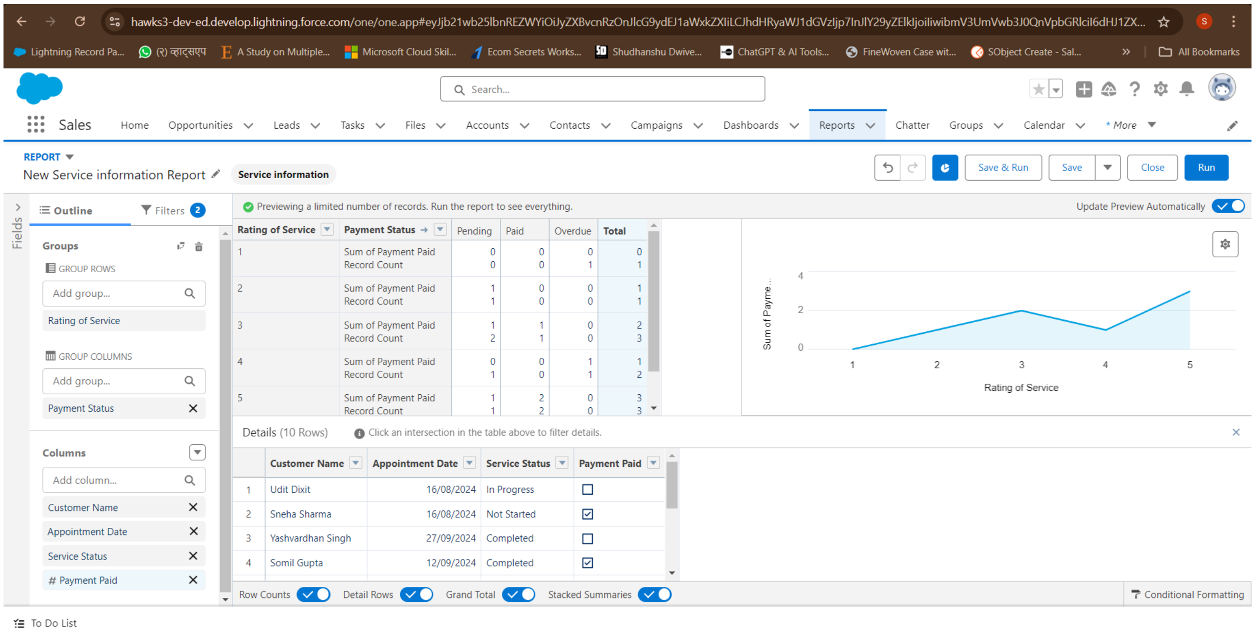

Reports
Recent
1 item
New Report
New Folder
Report Name
Description
Folder
Created By
Created On
Subscribed
Sample Flow Report: Screen Flows
Which flows run, what's the status of each interview, and how long do users take to complete the screens?
Public Reports
Automated Process
23/5/2024, 12:55 am

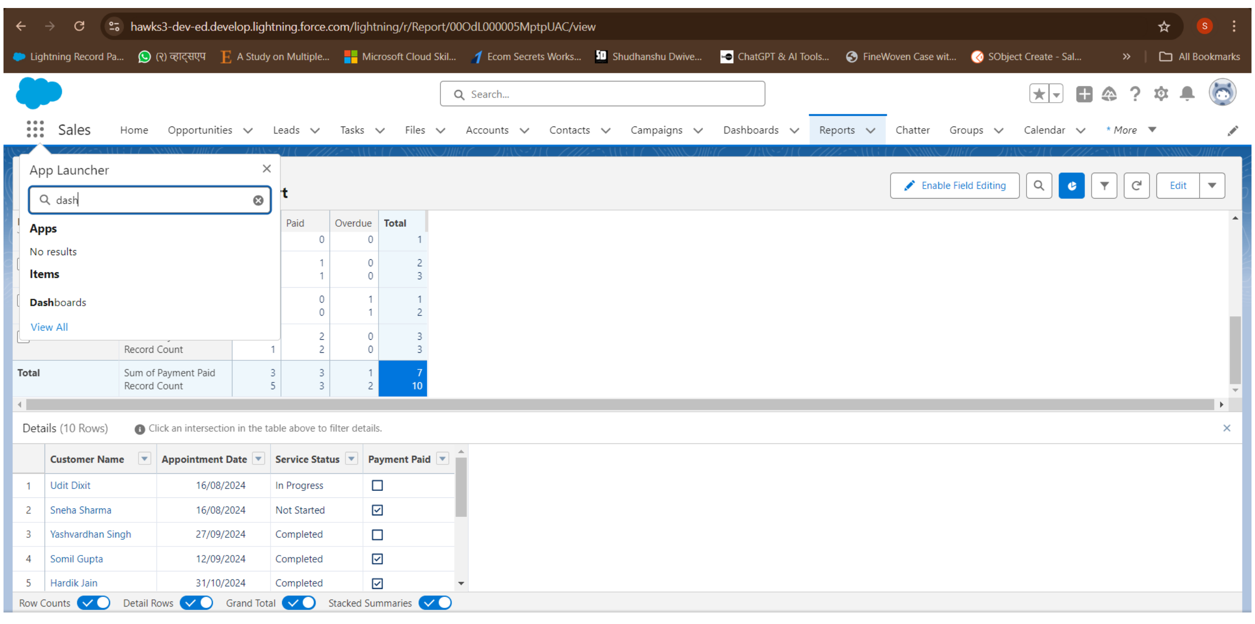

Create Report
Category
Recently Used
All
Accounts & Contacts
Opportunities
Customer Support Reports
Leads
Campaigns
Activities
Contracts and Orders
Select a Report Type
Showing results for serv
Report Type Name
Category
Service records
Standard
Service records with Appointment Date
Standard
Service records with Appointment
Standard
Service records History
Standard
Billing details and feedback with Service records
Standard
Service information
Custom


REPORT
New Service information Report
Service information
Add Chart
Save & Run
Save
Close
Run
Outline
Filters 2
Previewing a limited number of records. Run the report to see everything.
Update Preview Automatically
Customer Name
Appointment Date
Service Status
Payment Paid
Groups
GROUP ROWS
Add group...
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.
Columns
Add column...
Customer Name
Appointment Date
Service Status
Payment Paid
To Do List


REPORT
New Service information Report
Service information
Save & Run
Save
Close
Run
Outline
Filters
Previewing a limited number of records. Run the report to see everything.
Update Preview Automatically
Groups
GROUP ROWS
Add group...
Rating for service
GROUP COLUMNS
Add group...
Payment Status
Rating for service
Payment Status
Total
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
Columns
Add column...
Customer Name
Appointment Date
Service Status
Payment Paid
Row Counts
Detail Rows
Grand Total
Stacked Summaries
To Do List


Save Report
Report Unique Name
New_Service_information_Report_JR3
Report Description
Folder
Garage Management Folder
Select Folder
Cancel
Save





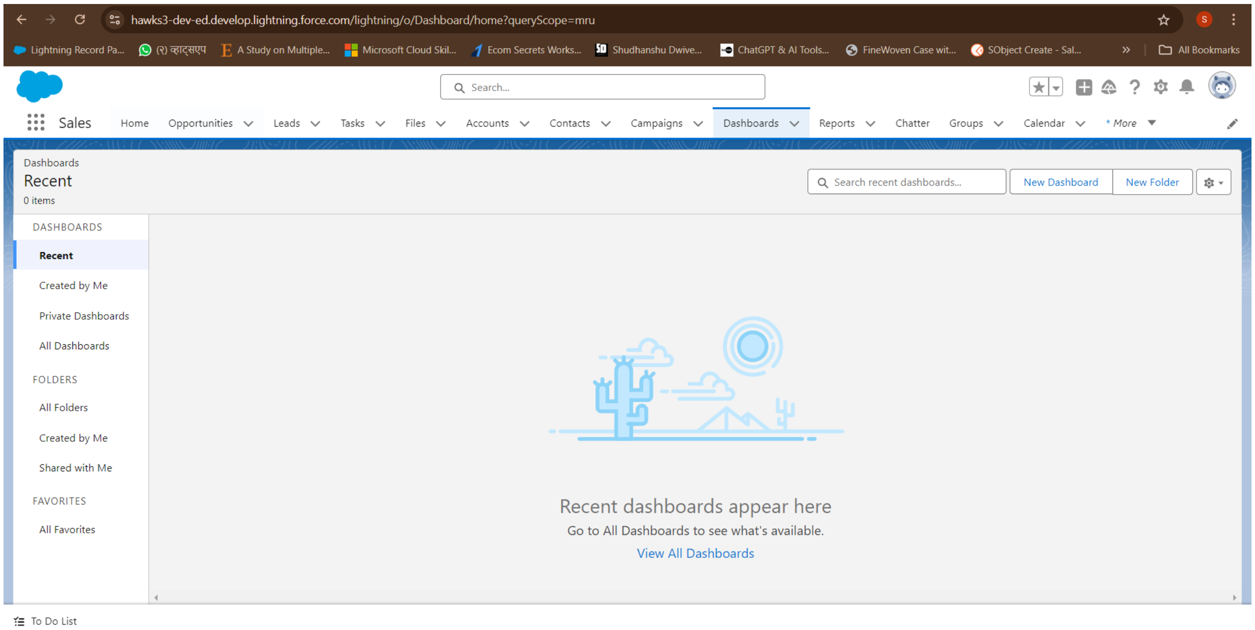
2. Choose the report type and configure filters, grouping, and columns.
3. Click **Save**.

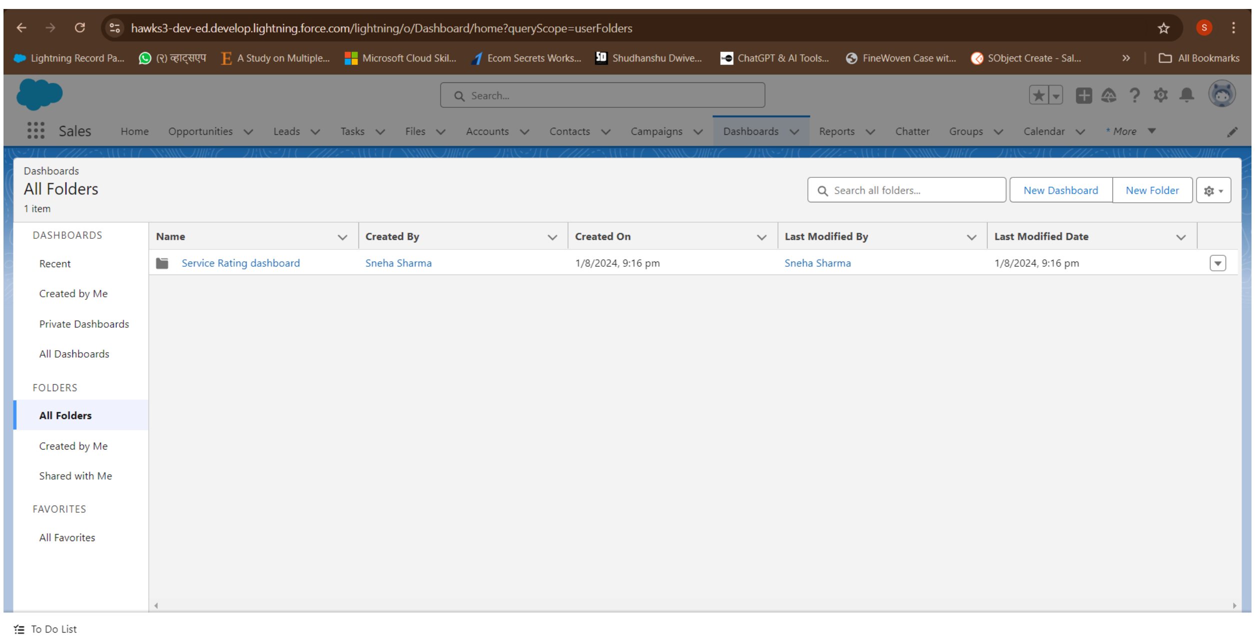
3.11.2 Creating Dashboards

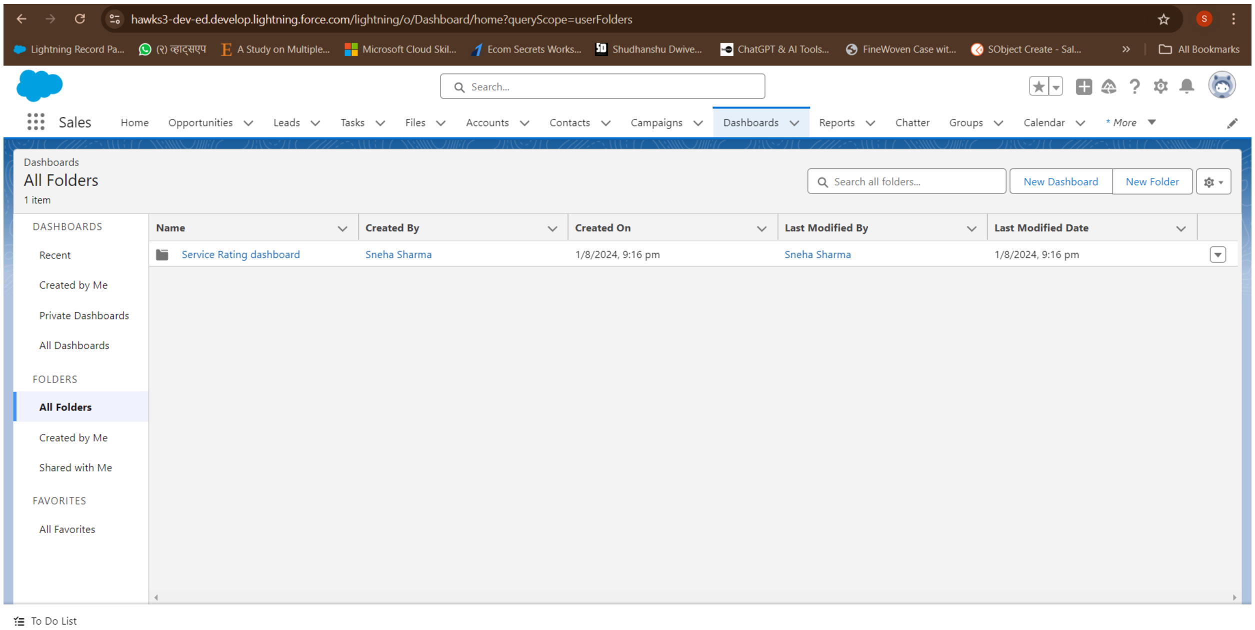
Task: Create dashboards to visualize key metrics.

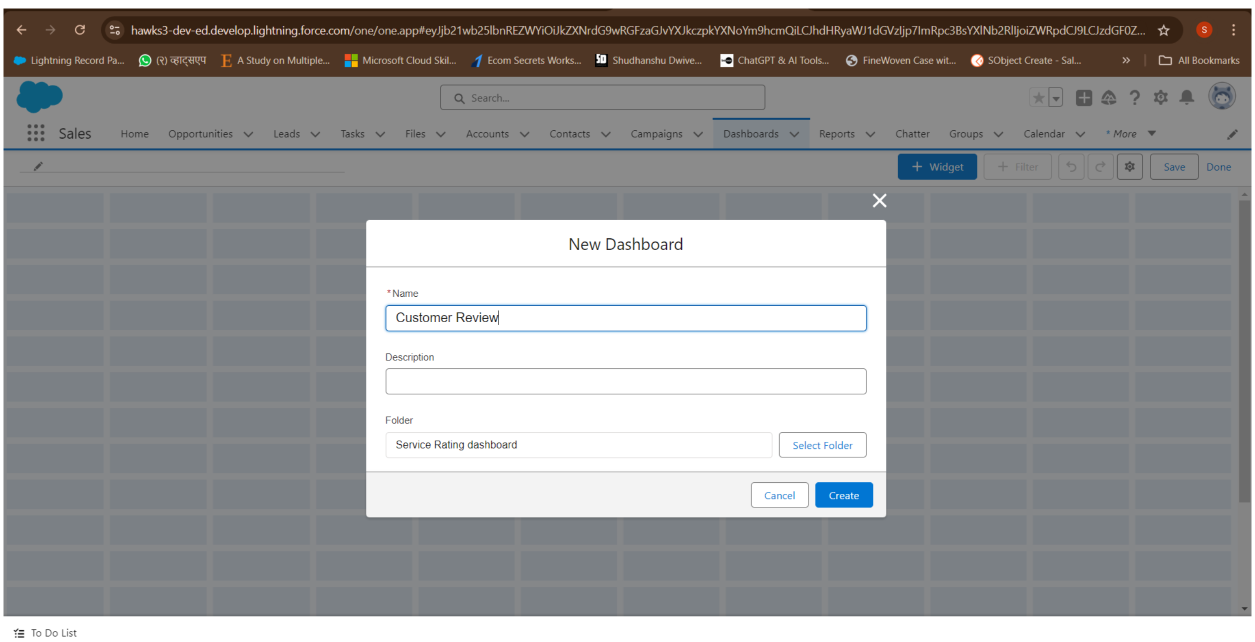
Process:

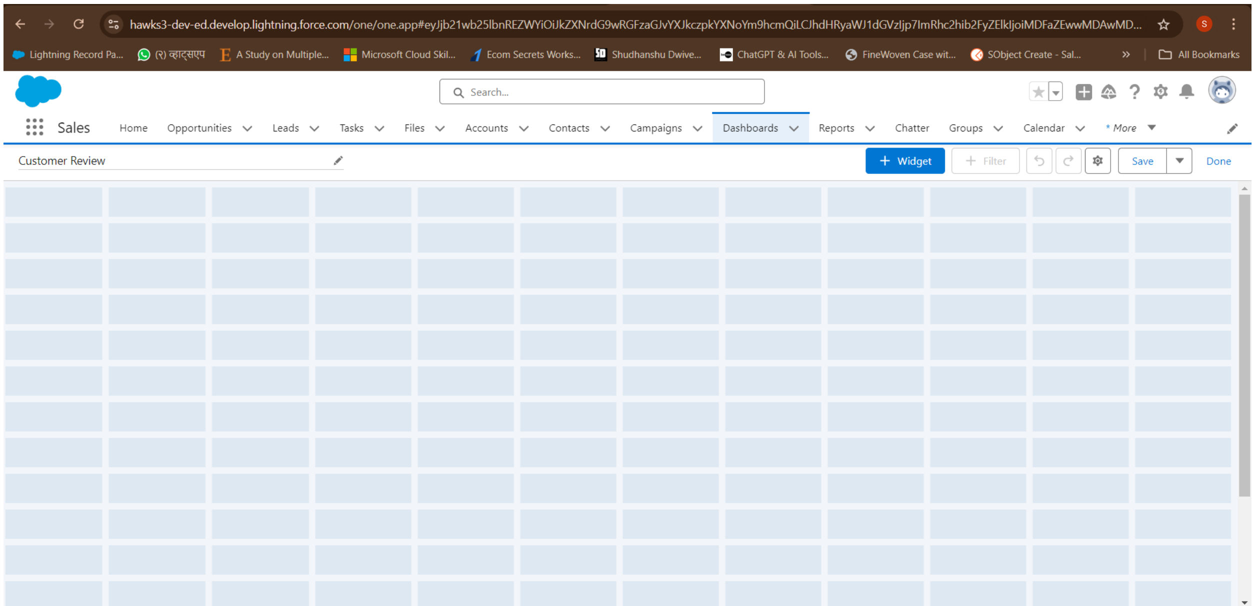
1. Go to **Dashboards** > **New Dashboard**.

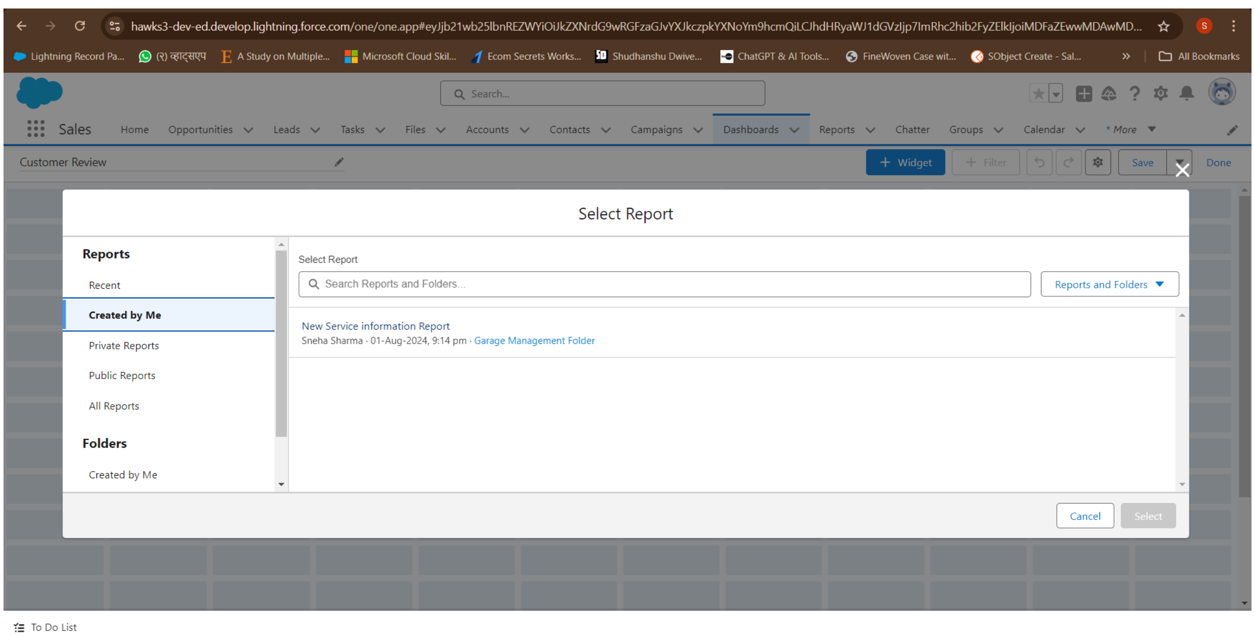

hawks3-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru
Sales
Home
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Campaigns
Dashboards
Reports
Chatter
Groups
Calendar
More
Dashboards
Recent
0 items
Search recent dashboards...
New Dashboard
New Folder
DASHBOARDS
Recent
Created by Me
Private Dashboards
All Dashboards
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites
Recent dashboards appear here
Go to All Dashboards to see what's available.
View All Dashboards
To Do List

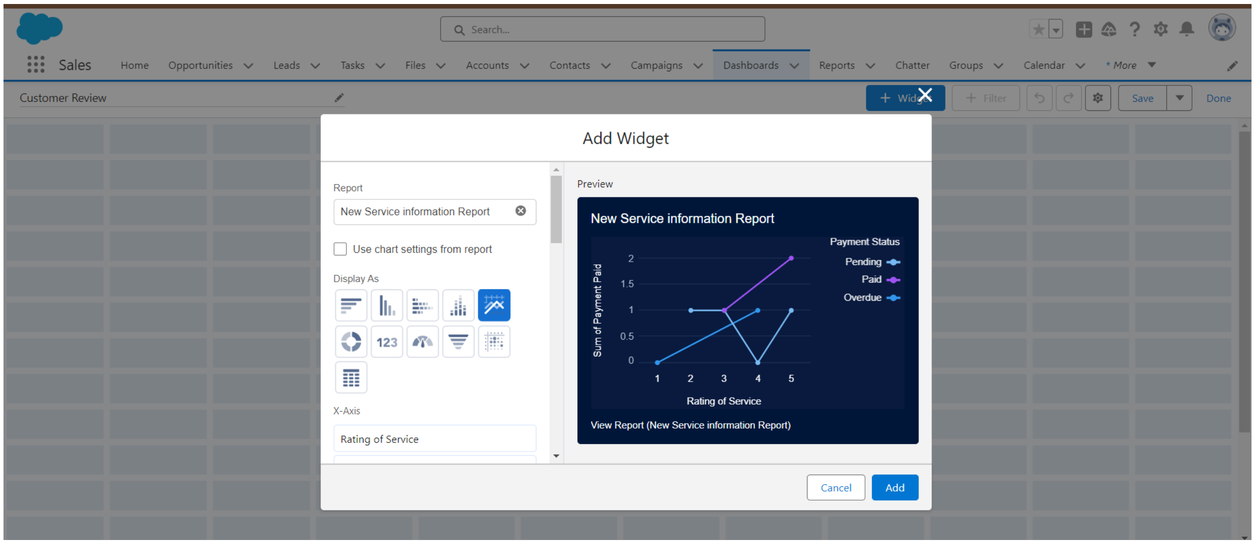

hawks3-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=userFolders
Sales
Dashboards
All Folders
1 item
Search all folders...
New Dashboard
New Folder
Name
Created By
Created On
Last Modified By
Last Modified Date
Service Rating dashboard
Sneha Sharma
1/8/2024, 9:16 pm
Sneha Sharma
1/8/2024, 9:16 pm
DASHBOARDS
Recent
Created by Me
Private Dashboards
All Dashboards
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites
To Do List

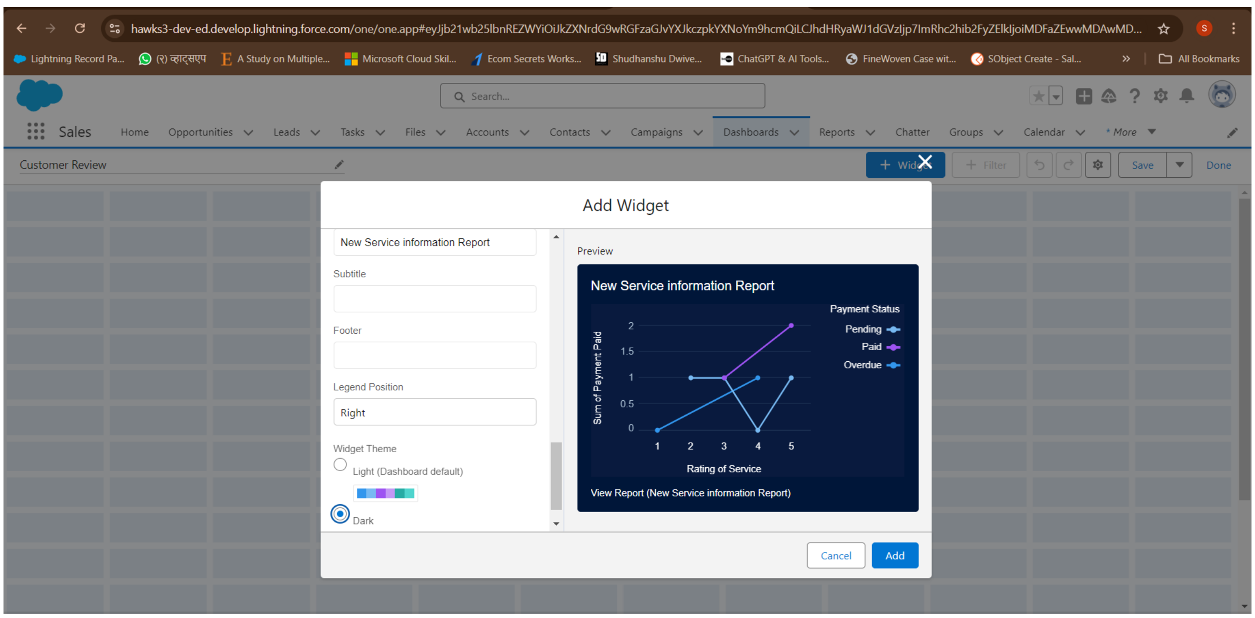

hawks3-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=userFolders
Sales
Home
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Campaigns
Dashboards
Reports
Chatter
Groups
Calendar
More
Dashboards
All Folders
1 item
Search all folders...
New Dashboard
New Folder
DASHBOARDS
Recent
Created by Me
Private Dashboards
All Dashboards
FOLDERS
All Folders
Created by Me
Shared with Me
FAVORITES
All Favorites
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
To Do List

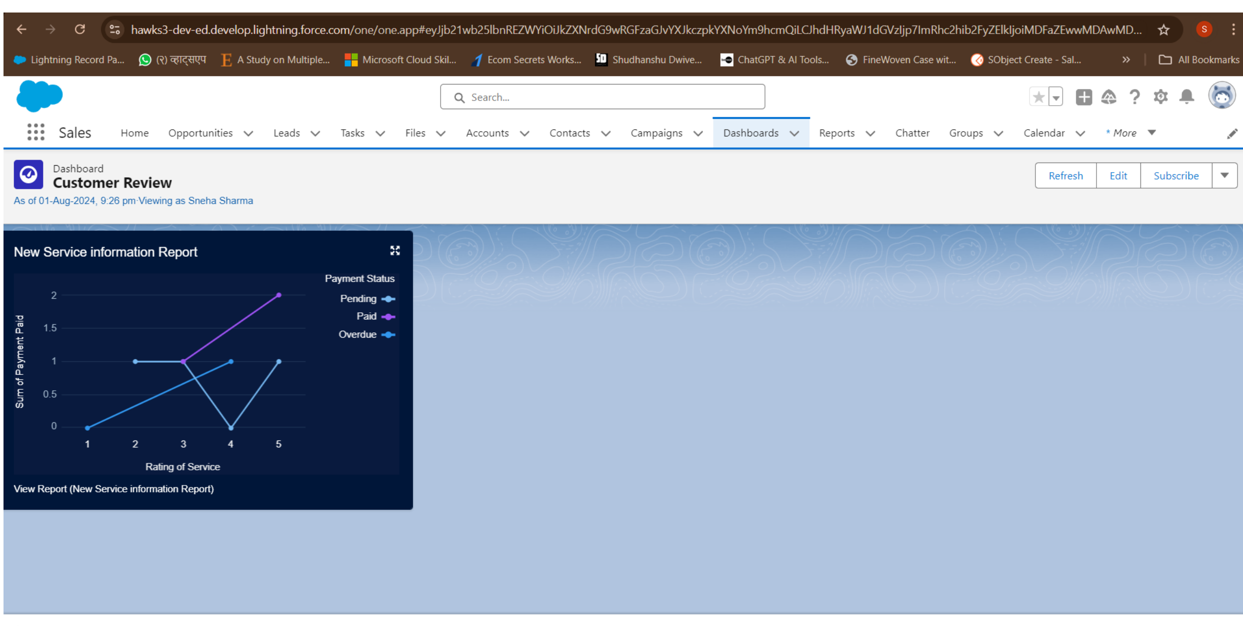

Sales
Widget
Filter
Save
Done
New Dashboard
* Name
Customer Review
Description
Folder
Service Rating dashboard
Select Folder
Cancel
Create
To Do List


Sales
Home
Opportunities
Leads
Tasks
Files
Accounts
Contacts
Campaigns
Dashboards
Reports
Chatter
Groups
Calendar
More
Customer Review
Widget
Filter
Save
Done

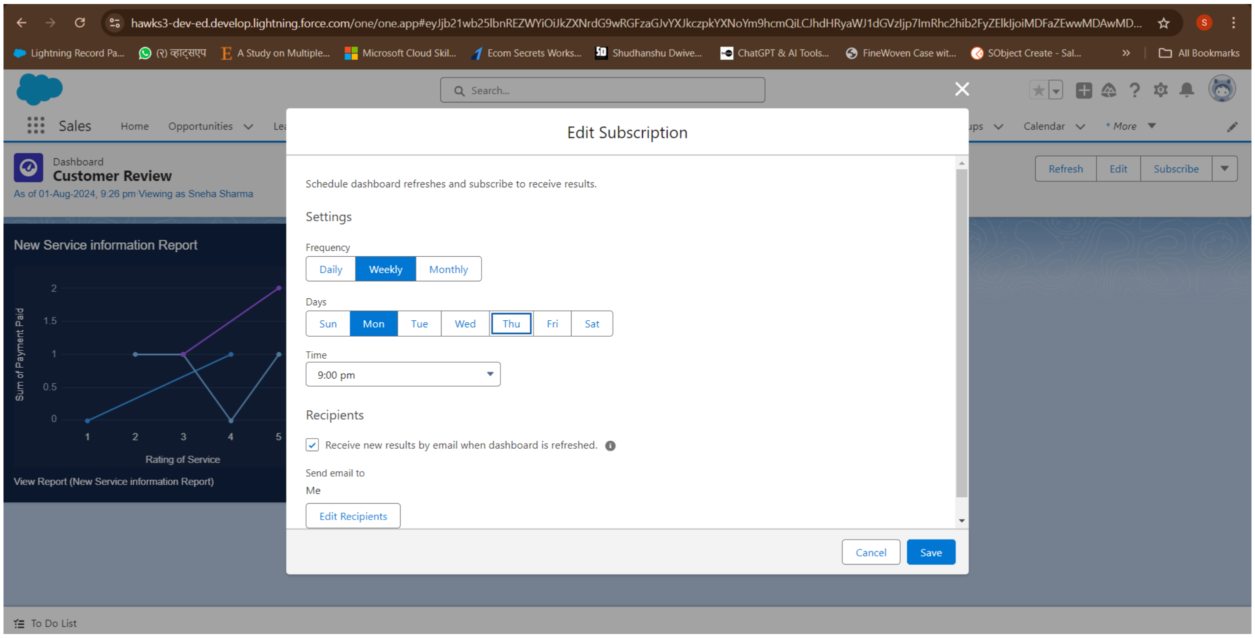

Customer Review
Select Report
Reports
Recent
Created by Me
Private Reports
Public Reports
All Reports
Folders
Created by Me
Select Report
Search Reports and Folders...
Reports and Folders
New Service information Report
Sneha Sharma · 01-Aug-2024, 9:14 pm · Garage Management Folder
Cancel
Select
To Do List


Add Widget
Report
New Service information Report
Use chart settings from report
Display As
X-Axis
Rating of Service
Preview
New Service information Report
Payment Status
Pending
Paid
Overdue
Sum of Payment Paid
Rating of Service
View Report (New Service information Report)
Cancel
Add


Add Widget
New Service information Report
Subtitle
Footer
Legend Position
Right
Widget Theme
Light (Dashboard default)
Dark
Preview
New Service information Report
Payment Status
Pending
Paid
Overdue
Sum of Payment Paid
Rating of Service
View Report (New Service information Report)
Cancel
Add


Dashboard
Customer Review
As of 01-Aug-2024, 9:26 pm Viewing as Sneha Sharma
Refresh
Edit
Subscribe
New Service information Report
Payment Status
Pending
Paid
Overdue
Sum of Payment Paid
Rating of Service
View Report (New Service information Report)
To Do List

5



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