Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

salesforce

Sign up for your Salesforce Developer Edition

A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name*

Your first name

Last Name*

Your last name

Email*

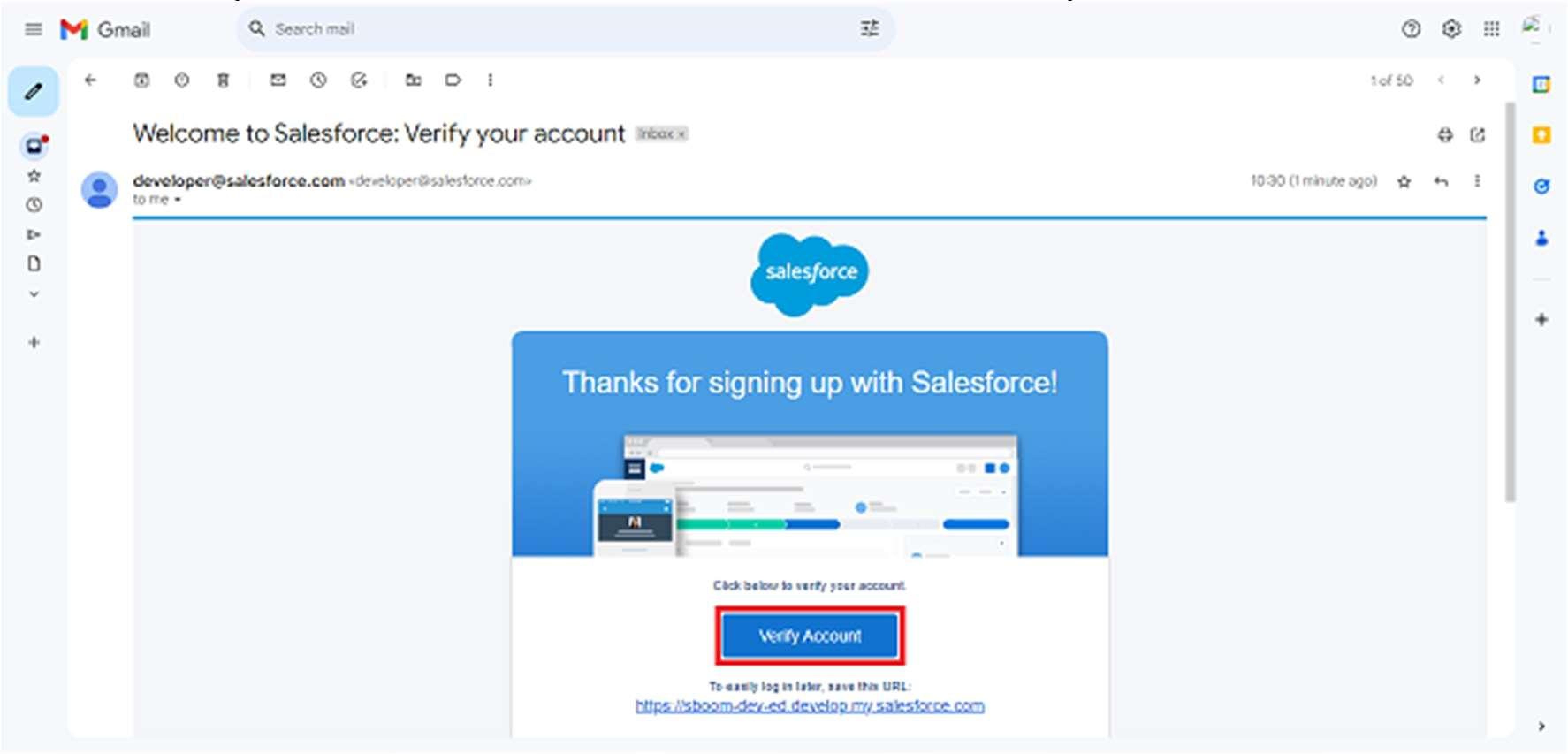
Your email address

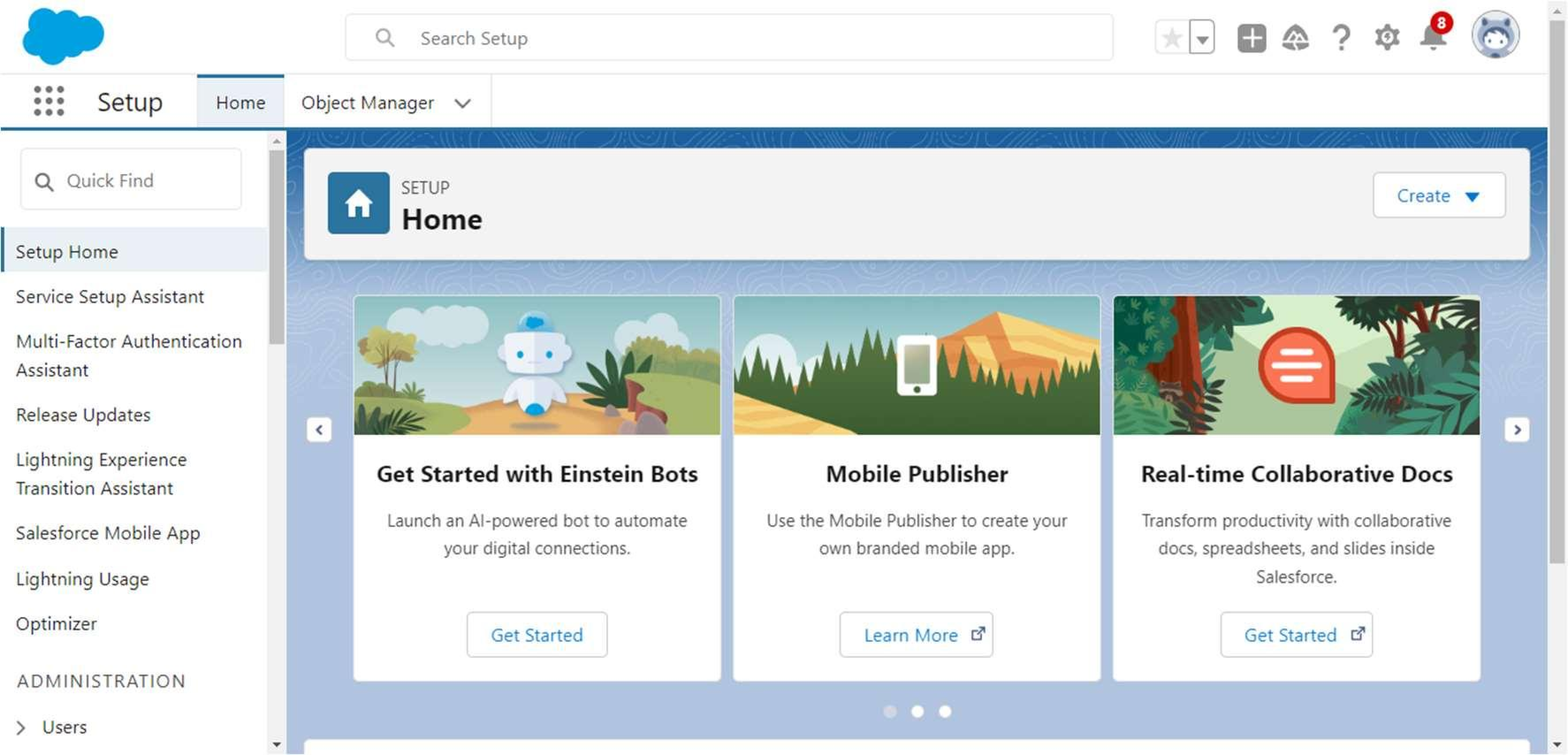
Role*

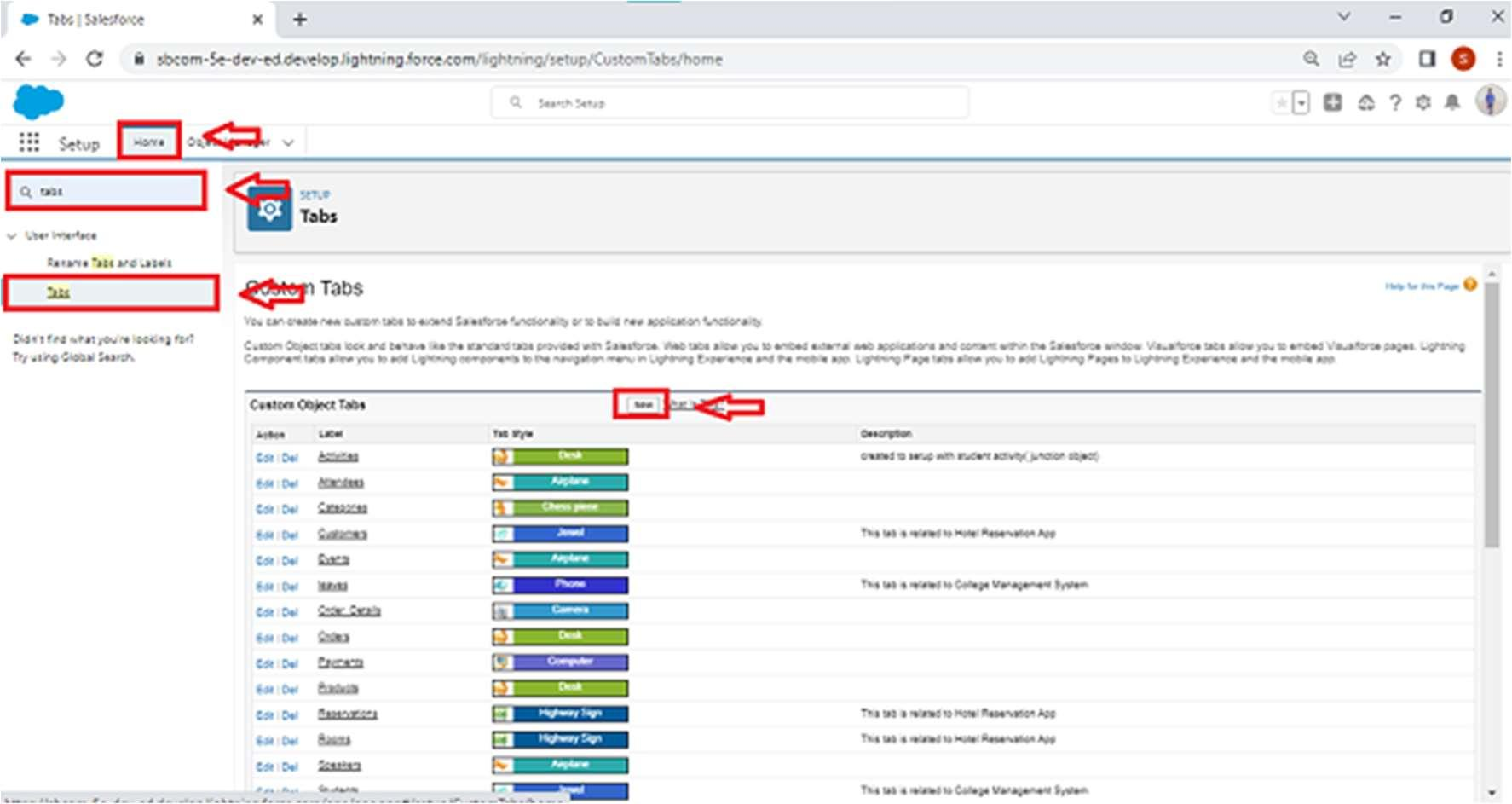
Your job role

Company*

Company Name


Gmail
Search mail
1 of 50
Welcome to Salesforce: Verify your account
Inbox ×
developer@salesforce.com <developer@salesforce.com>
to me
10:30 (1 minute ago)
salesforce
Thanks for signing up with Salesforce!
Click below to verify your account.
Verify Account
To easily log in later, save this URL:
https://sboom-dev-ed.develop.my.salesforce.com


Search Setup
8
Setup
Home
Object Manager
Quick Find
Setup Home
Service Setup Assistant
Multi-Factor Authentication Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
Optimizer
ADMINISTRATION
Users
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


Tabs | Salesforce
sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home
Search Setup
Setup
Home
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
SETUP
Tabs
Custom Tabs
You can create new custom tabs to extend Salesforce functionality or to build new application functionality.
Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.
Custom Object Tabs
New
Action
Label
Tab Style
Description
Edit | Del
Desk
Airplane
Chess piece
Jewel
Phone
Camera
Computer
Highway Sign
This tab is related to Hotel Reservation App
This tab is related to College Management System


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
(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


Tab Style Selector
Create your own style
Hide styles which are used on other tabs
Airplane
Alarm clock
Apple
Balls
Bank[1]
Bell
Big top
Boat[1]
Books
Bottle
Box
Bridge
Building
Building Block
Caduceus
Camera
Can
Car
Castle
CD/DVD
Cell phone
Chalkboard
Chess piece
Chip
Circle
Compass
Computer
Credit card
CRT TV
Cup
Desk[1]
Diamond
Dice
Factory
Fan
Flag
Form
Gears
Globe
Guitar
Hammer
Hands
Handsaw
Headset
Heart[1]
Helicopter
Hexagon
Highway Sign
Hot Air Balloon
Insect
IP Phone
Jewel
Keys
Laptop
Leaf
Lightning
Save
Cancel

Step 3. Add to Custom Apps

Step 3 of 3

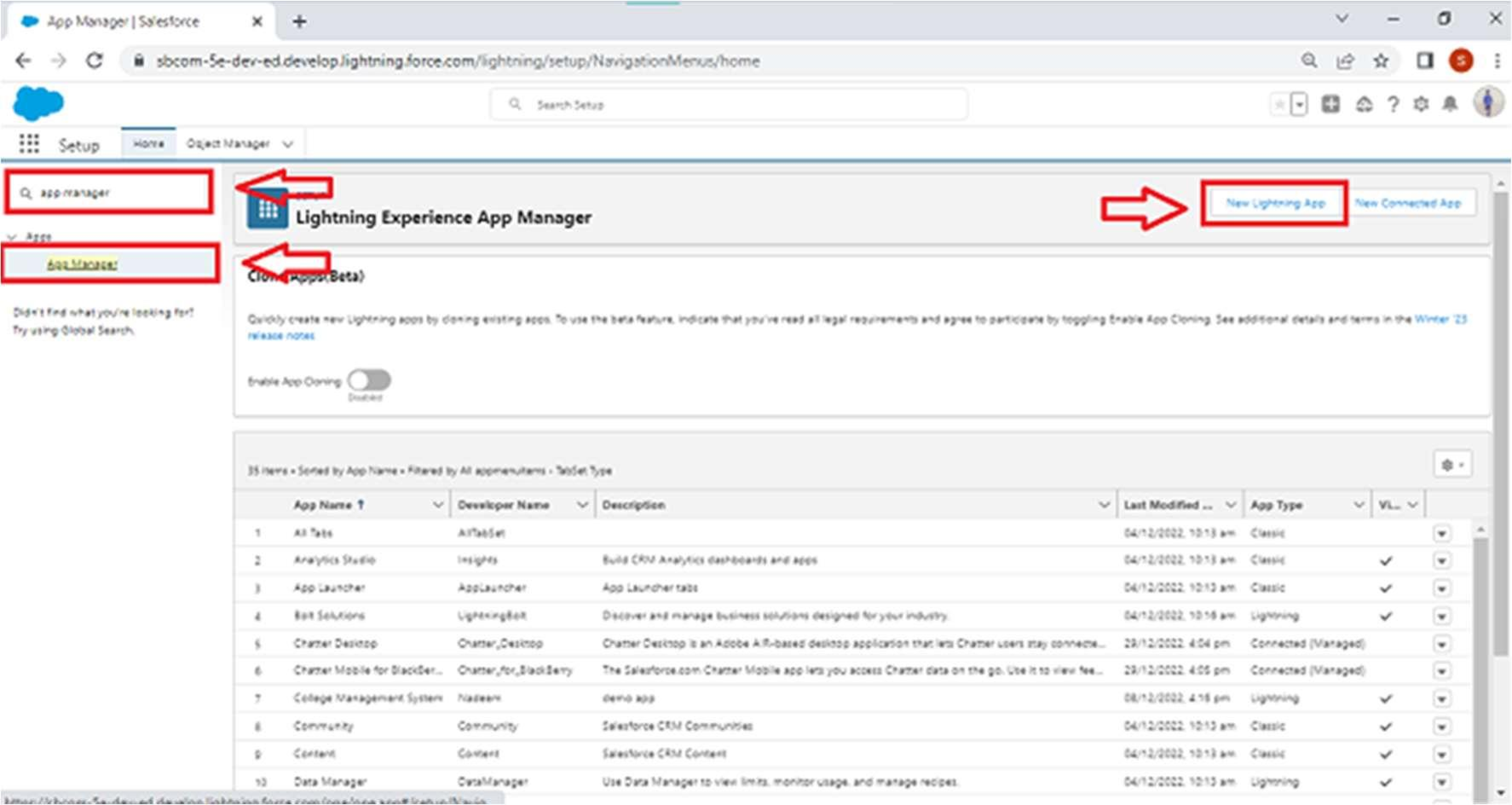
Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

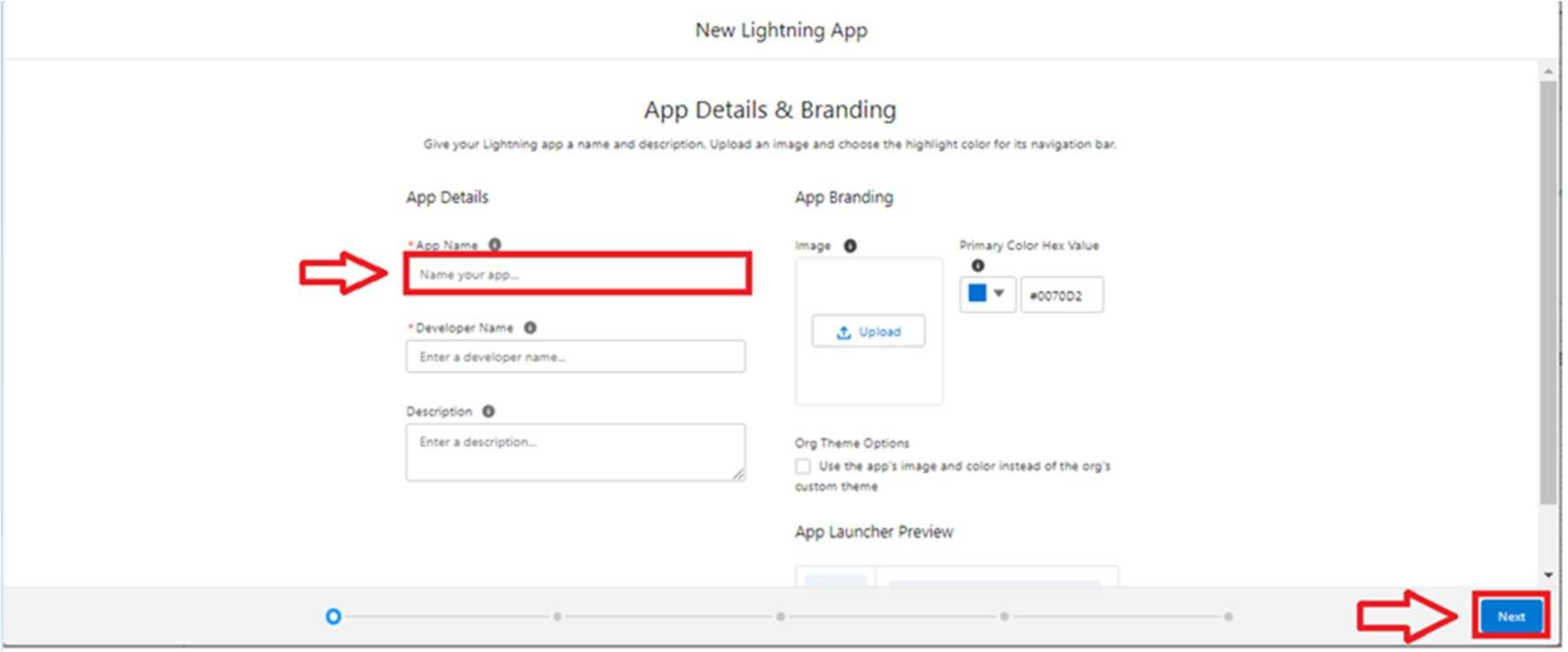
Custom App	☐ Include Tab
Platform (standard__Platform)	☐
Sales (standard__Sales)	☐
Service (standard__Service)	☐
Marketing (standard__Marketing)	☐
Sample Console (standard__ServiceConsole)	☐
High Volume Customer Portal User	☐
Authenticated Website User	☐
App Launcher (standard__AppLauncher)	☐

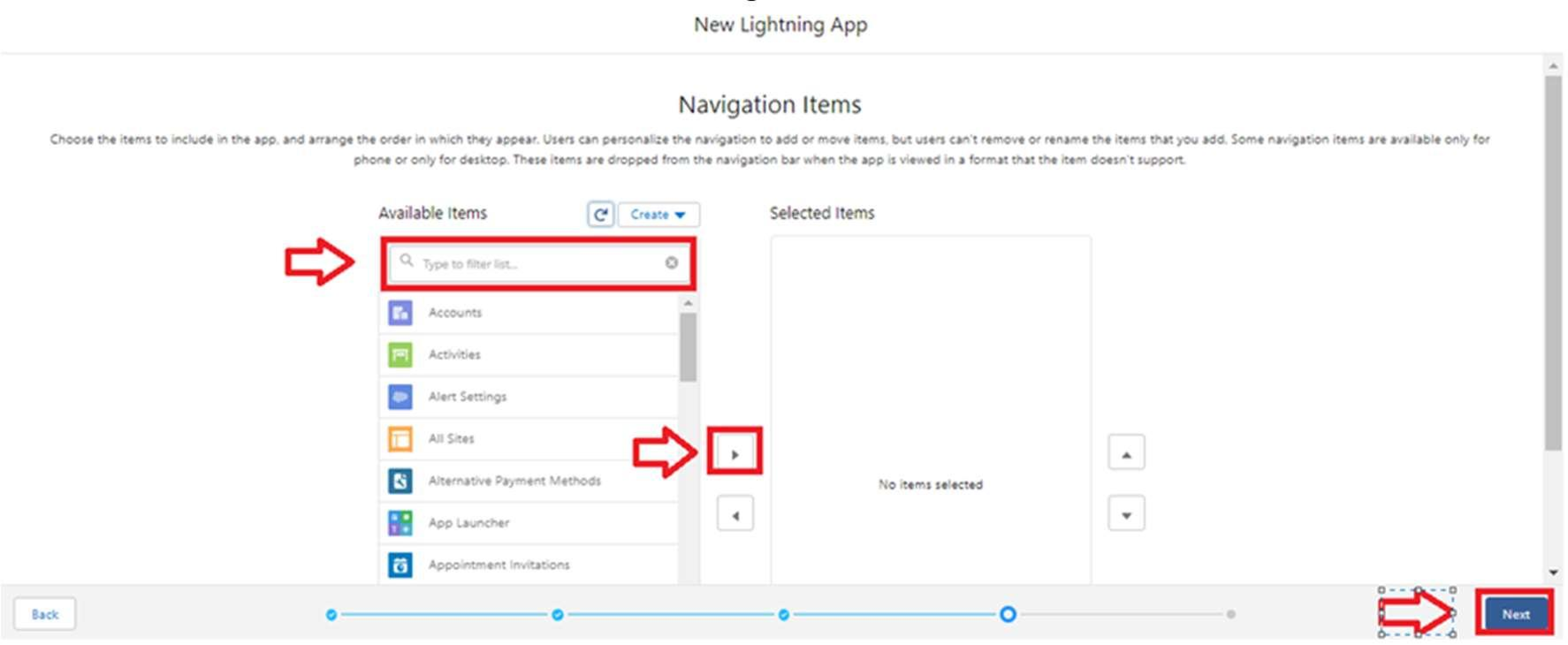
Analytics Studio (standard__Insights)	☐
Sales Console (standard__LightningSalesConsole)	☐
Service Console (standard__LightningService)	☐
Sales (standard__LightningSales)	☐
Lightning Usage App (standard__LightningInstrumentation)	☐
Digital Experiences (standard__SalesforceCMS)	☐
Queue Management (standard__QueueManagement)	☐
Bolt Solutions (standard__LightningBolt)	☐
Data Manager (standard__DataManager)	☐
Salesforce Scheduler Setup (standard__LightningScheduler)	☐

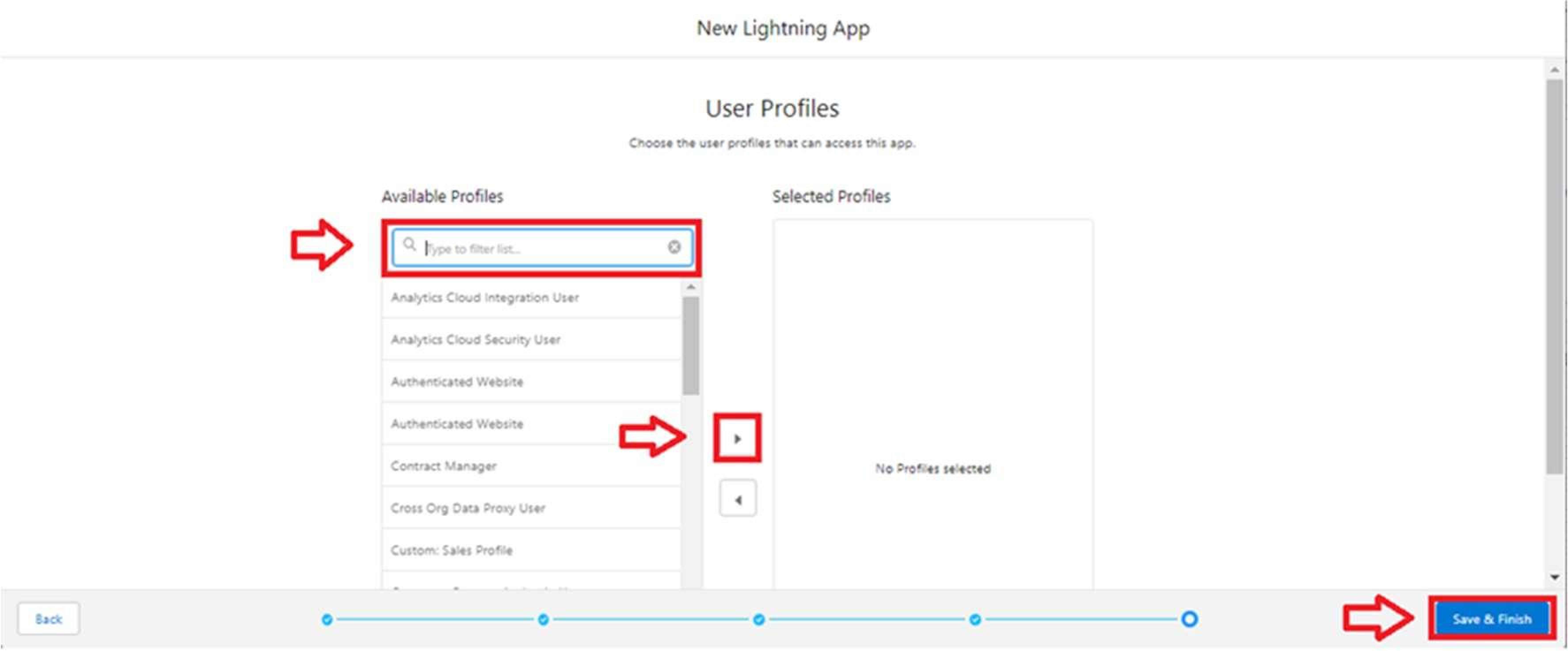
☑ Append tab to users' existing personal customizations

Previous | Save | Cancel

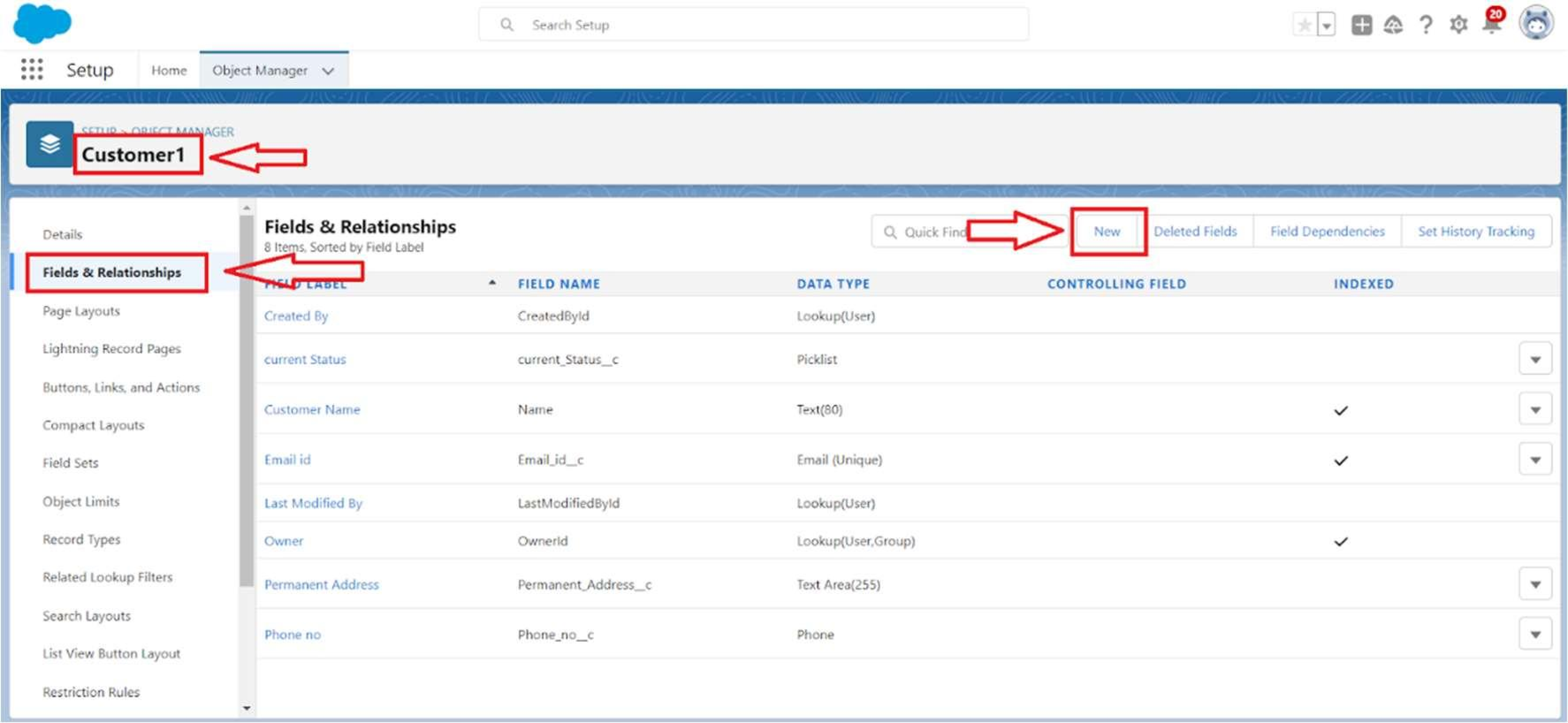

App Manager | Salesforce
sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home
Search Setup
Setup
Home
Object Manager
app manager
Apps
App Manager
Didn't find what you're looking for? Try using Global Search.
Lightning Experience App Manager
New Lightning App
New Connected App
Clone Apps(Beta)
Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the Winter '23 release notes.
Enable App Cloning
Disabled
35 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type
App Name
Developer Name
Description
Last Modified ...
App Type
1 All Tabs AllTabSet 04/12/2022, 10:13 am Classic
2 Analytics Studio Insights Build CRM Analytics dashboards and apps 04/12/2022, 10:13 am Classic
3 App Launcher AppLauncher App Launcher tabs 04/12/2022, 10:13 am Classic
4 Bolt Solutions LightningBolt Discover and manage business solutions designed for your industry. 04/12/2022, 10:16 am Lightning
5 Chatter Desktop Chatter_Desktop 29/12/2022, 4:04 pm Connected (Managed)
6 Chatter Mobile for BlackBer... Chatter_for_BlackBerry 29/12/2022, 4:05 pm Connected (Managed)
7 College Management System Nadeem demo app 08/12/2022, 4:16 pm Lightning
8 Community Community Salesforce CRM Communities 04/12/2022, 10:13 am Classic
9 Content Content Salesforce CRM Content 04/12/2022, 10:13 am Classic
10 Data Manager DataManager Use Data Manager to view limits, monitor usage, and manage recipes. 04/12/2022, 10:13 am Lightning

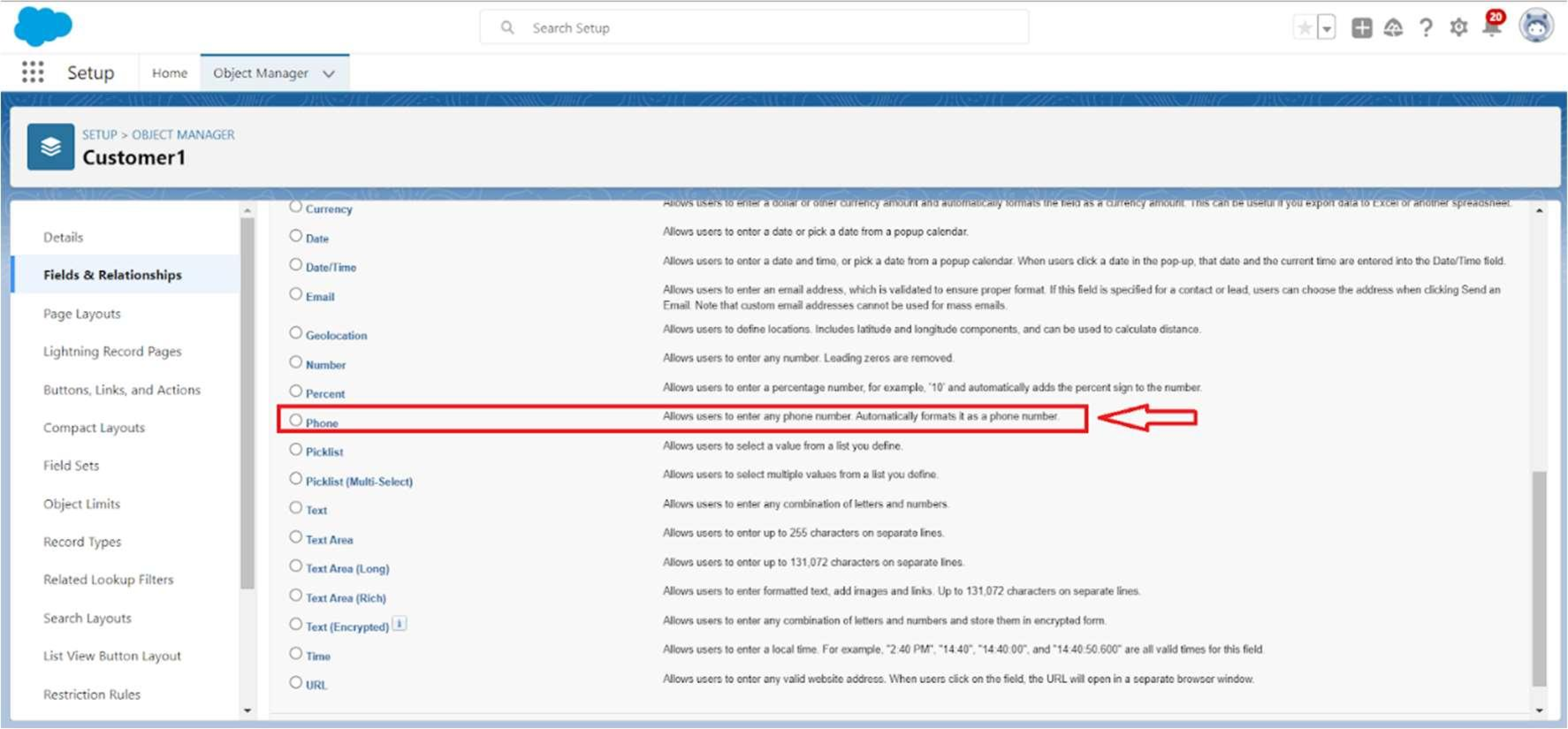

New Lightning App
App Details & Branding
Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.
App Details
* App Name
Name your app...
* Developer Name
Enter a developer name...
Description
Enter a description...
App Branding
Image
Upload
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

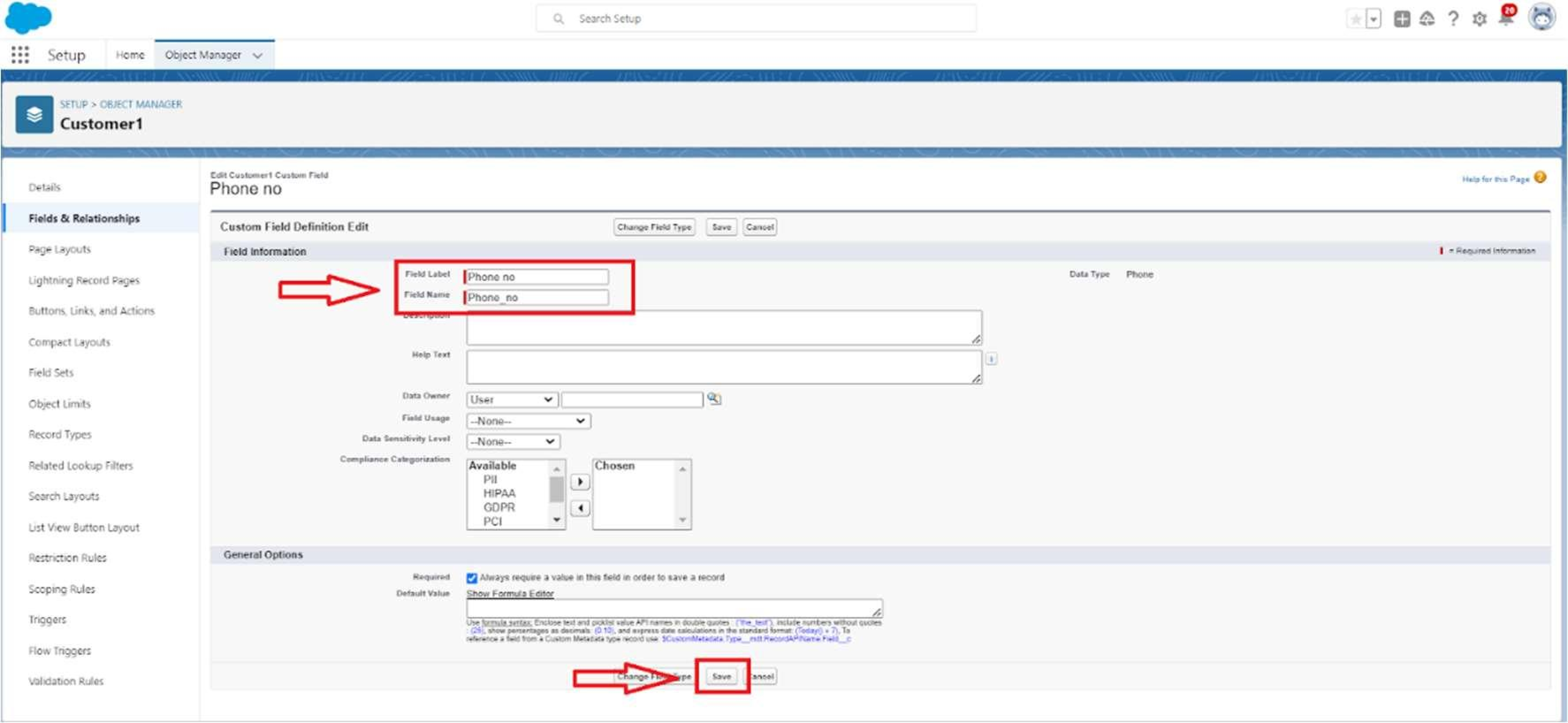

New Lightning App
Navigation Items
Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.
Available Items
Create
Type to filter list...
Accounts
Activities
Alert Settings
All Sites
Alternative Payment Methods
App Launcher
Appointment Invitations
Selected Items
No items selected
Back
Next

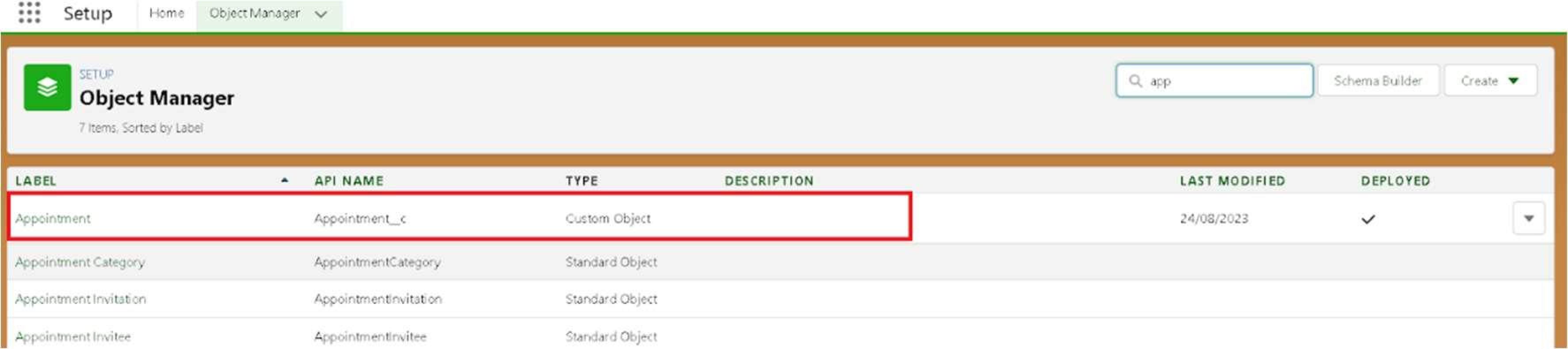

New Lightning App
User Profiles
Choose the user profiles that can access this app.
Available Profiles
Type to filter list...
Analytics Cloud Integration User
Analytics Cloud Security User
Authenticated Website
Authenticated Website
Contract Manager
Cross Org Data Proxy User
Custom: Sales Profile
Selected Profiles
No Profiles selected
Back
Save & Finish

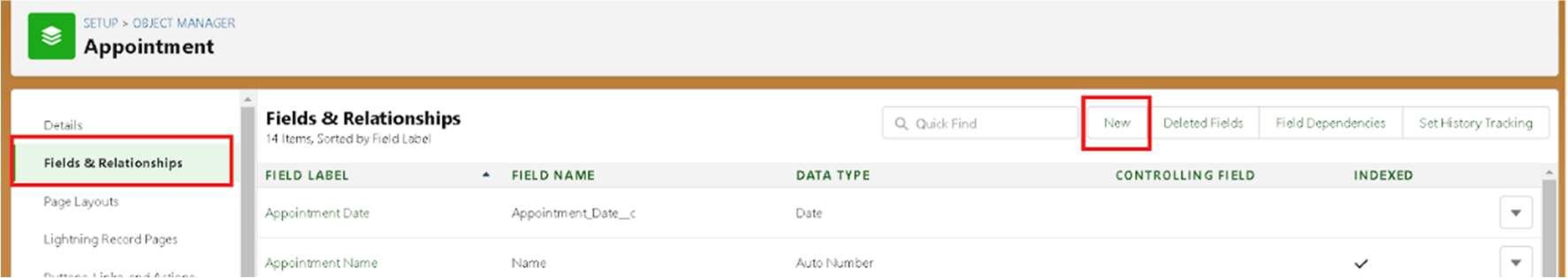

SETUP
Object Manager
2 Items, Sorted by Label
cus
Schema Builder
Create
LABEL
API NAME
TYPE
DESCRIPTION
LAST MODIFIED
DEPLOYED
Customer
Customer
Standard Object
Customer Details
Customer_Details__c
Custom Object
05/10/2023


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Customer1
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
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
Created By
CreatedById
Lookup(User)
current Status
current_Status__c
Picklist
Customer Name
Name
Text(80)
Email id
Email_id__c
Email (Unique)
Last Modified By
LastModifiedById
Lookup(User)
Owner
OwnerId
Lookup(User,Group)
Permanent Address
Permanent_Address__c
Text Area(255)
Phone no
Phone_no__c
Phone


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Customer1
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
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.
Text (Encrypted)
Allows users to enter any combination of letters and numbers and store them in encrypted form.
Time
Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.
URL
Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.


Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Customer1
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
Scoping Rules
Triggers
Flow Triggers
Validation Rules
Edit Customer1 Custom Field
Phone no
Help for this Page
Custom Field Definition Edit
Change Field Type
Save
Cancel
Field Information
= Required Information
Field Label
Phone no
Field Name
Phone_no
Data Type
Phone
Help Text
Data Owner
User
Field Usage
--None--
Data Sensitivity Level
--None--
Compliance Categorization
Available
PII
HIPAA
GDPR
PCI
Chosen
General Options
Required
Always require a value in this field in order to save a record
Default Value
Show Formula Editor
Save


Setup
Home
Object Manager
SETUP
Object Manager
7 Items, Sorted by Label
app
Schema Builder
Create
LABEL
API NAME
TYPE
DESCRIPTION
LAST MODIFIED
DEPLOYED
Appointment
Appointment__c
Custom Object
24/08/2023
Appointment Category
AppointmentCategory
Standard Object
Appointment Invitation
AppointmentInvitation
Standard Object
Appointment Invitee
AppointmentInvitee
Standard Object


SETUP > OBJECT MANAGER
Appointment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Fields & Relationships
14 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

Next Cancel

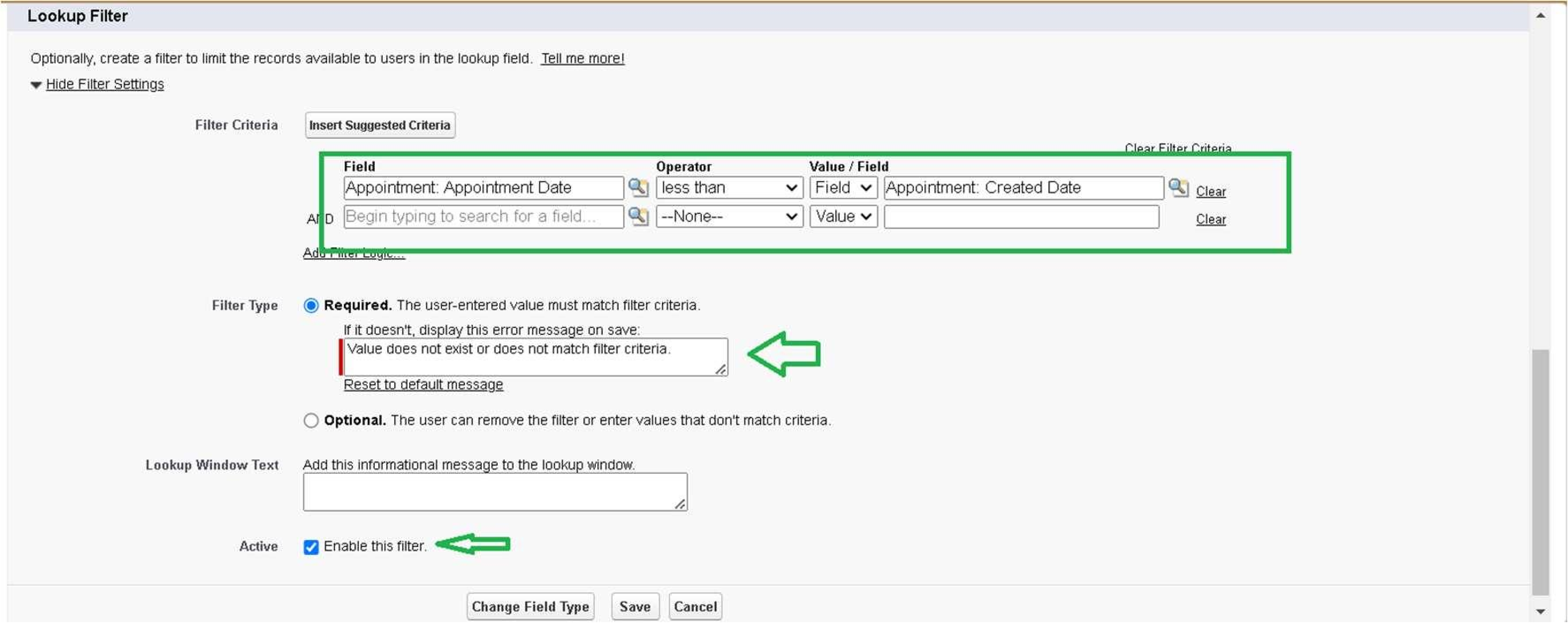
Specify the type of information that the custom field will contain.

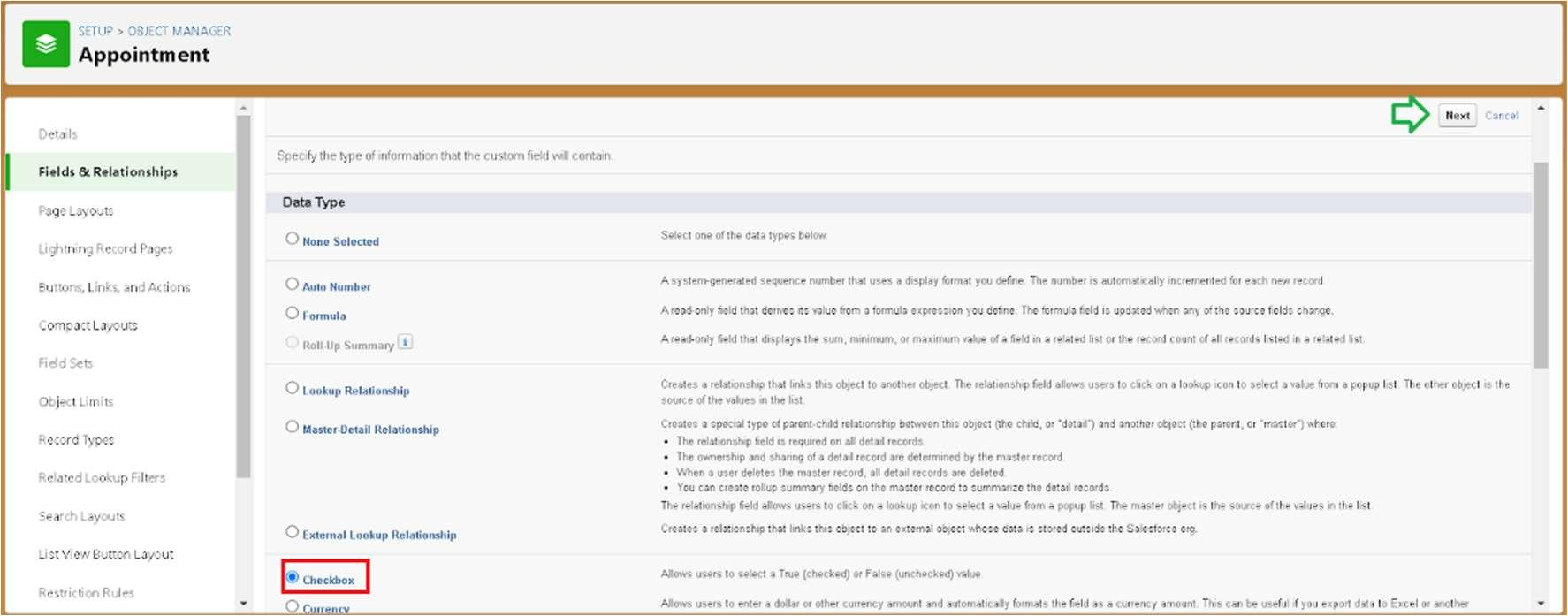
Data Type

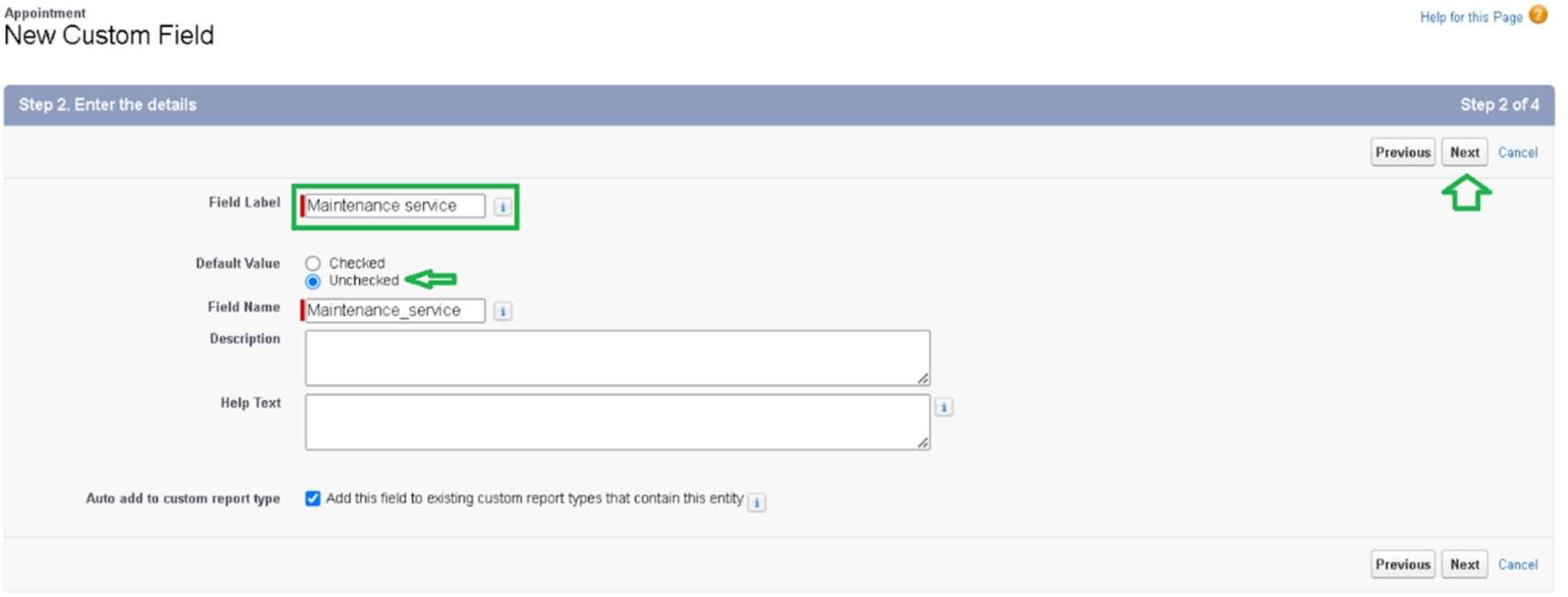
○ None Selected	Select one of the data types below.
○ Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
○ Formula	A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
○ Roll-Up Summary i	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.

Lookup Options

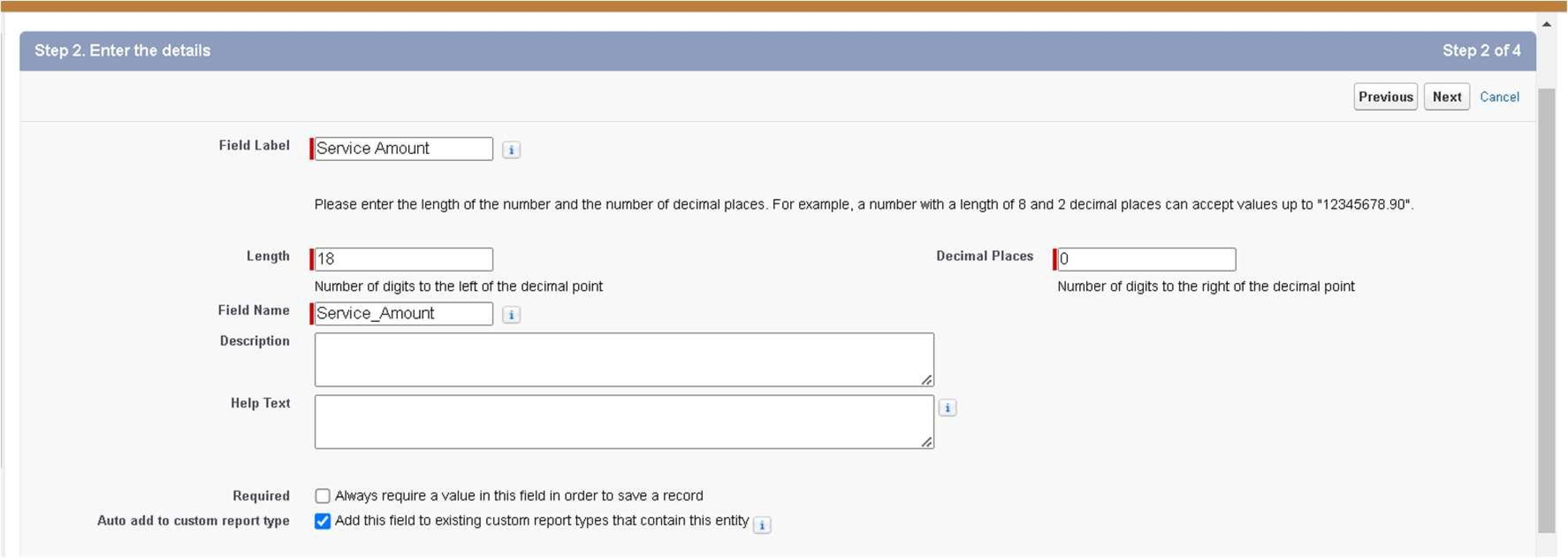
Related To	Appointment	**Child Relationship Name**	Service_records
Related List Label	Service records		
Required	☑ Always require a value in this field in order to save a record		
What to do if the lookup record is deleted?	○ Clear the value of this field. You can't choose this option if you make this field required. ◉ Don't allow deletion of the lookup record that's part of a lookup relationship.		


Lookup Filter
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
less than
Field
Appointment: Created Date
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.
Change Field Type
Save
Cancel


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
Next
Cancel
Specify the type of information that the custom field will contain.
Data Type
None Selected
Select one of the data types below.
Auto Number
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
Formula
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
Roll-Up Summary
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
Lookup Relationship
Creates a 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


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
Previous
Next
Cancel


Appointment
New Custom Field
Help for this Page
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


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

Appointment

New Custom Field

Help for this Page

Step 3. Establish field-level security

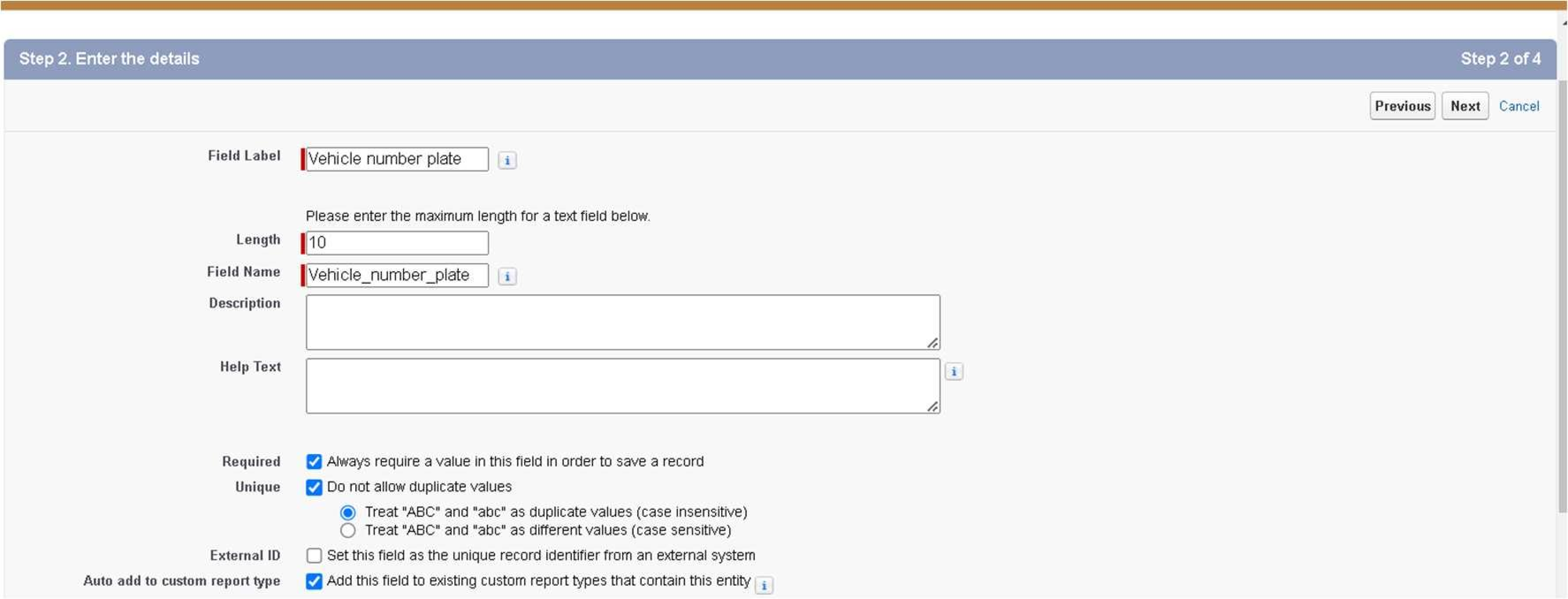
Step 3 of 4

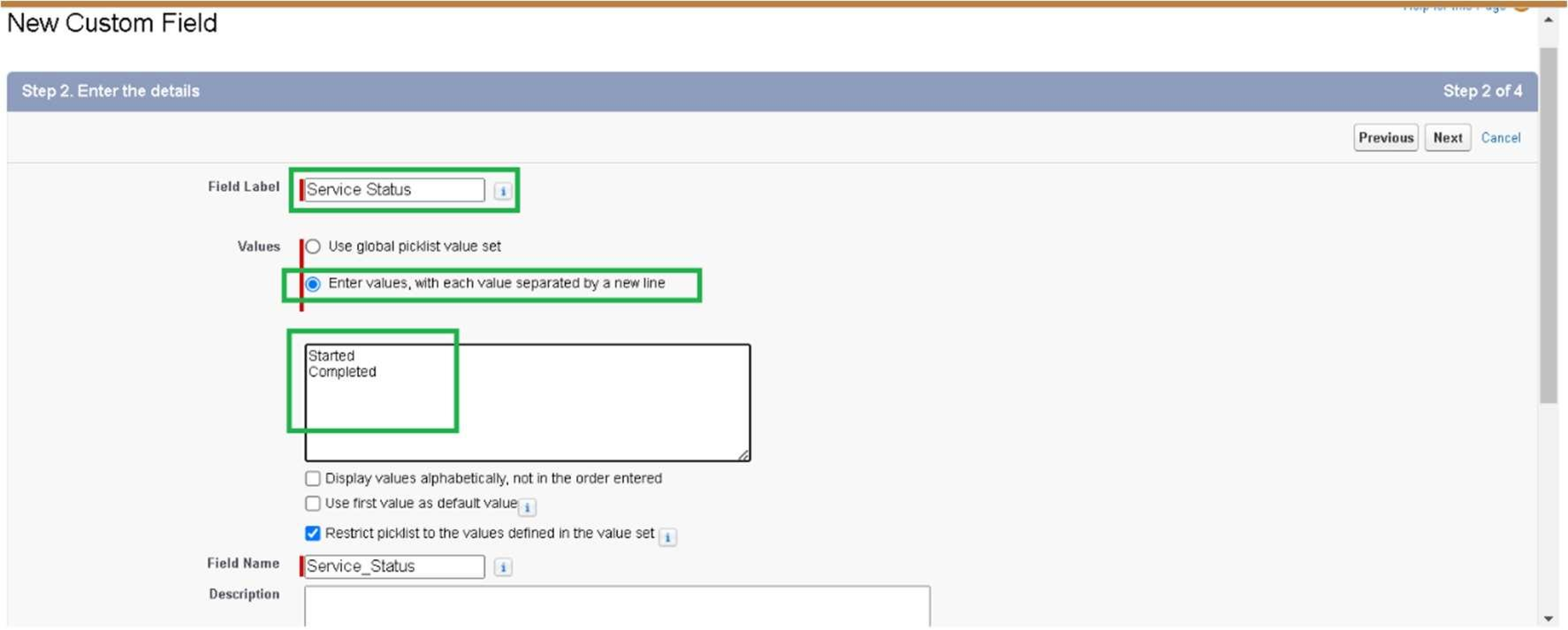
Previous Next Cancel

Field Label	Service Amounts
Data Type	Currency
Field Name	Service_Amounts
Description	

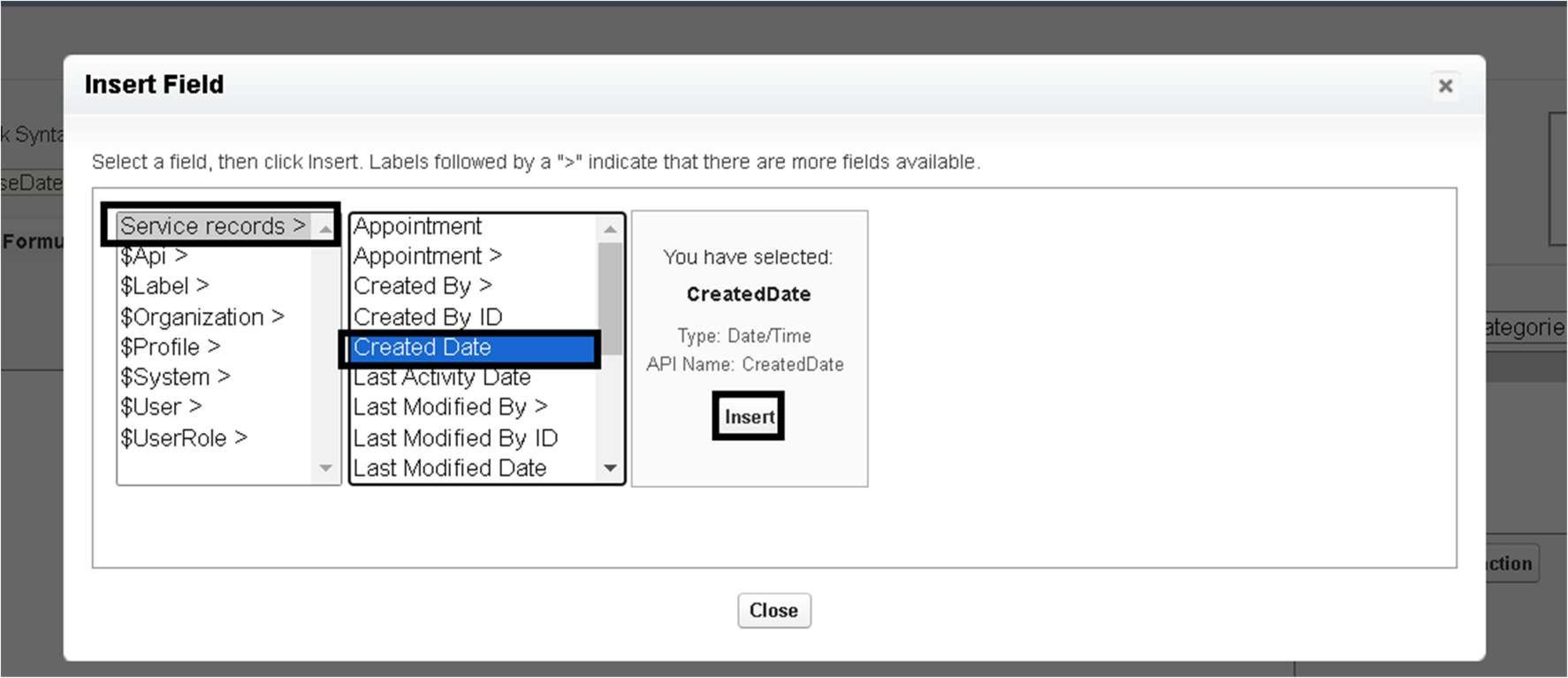
Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

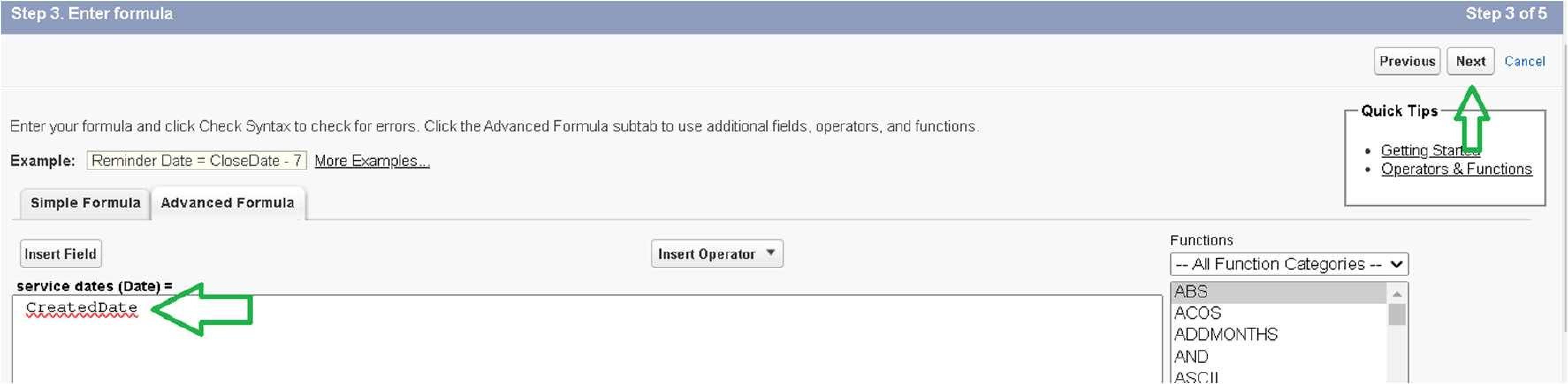
Field-Level Security for Profile	☑ Visible	☑ Read-Only
Analytics Cloud Integration User	☑	☑
Analytics Cloud Security User	☑	☑
Authenticated Website	☑	☑
Authenticated Website	☑	☑
Contract Manager	☑	☑
Cross Org Data Proxy User	☑	☑

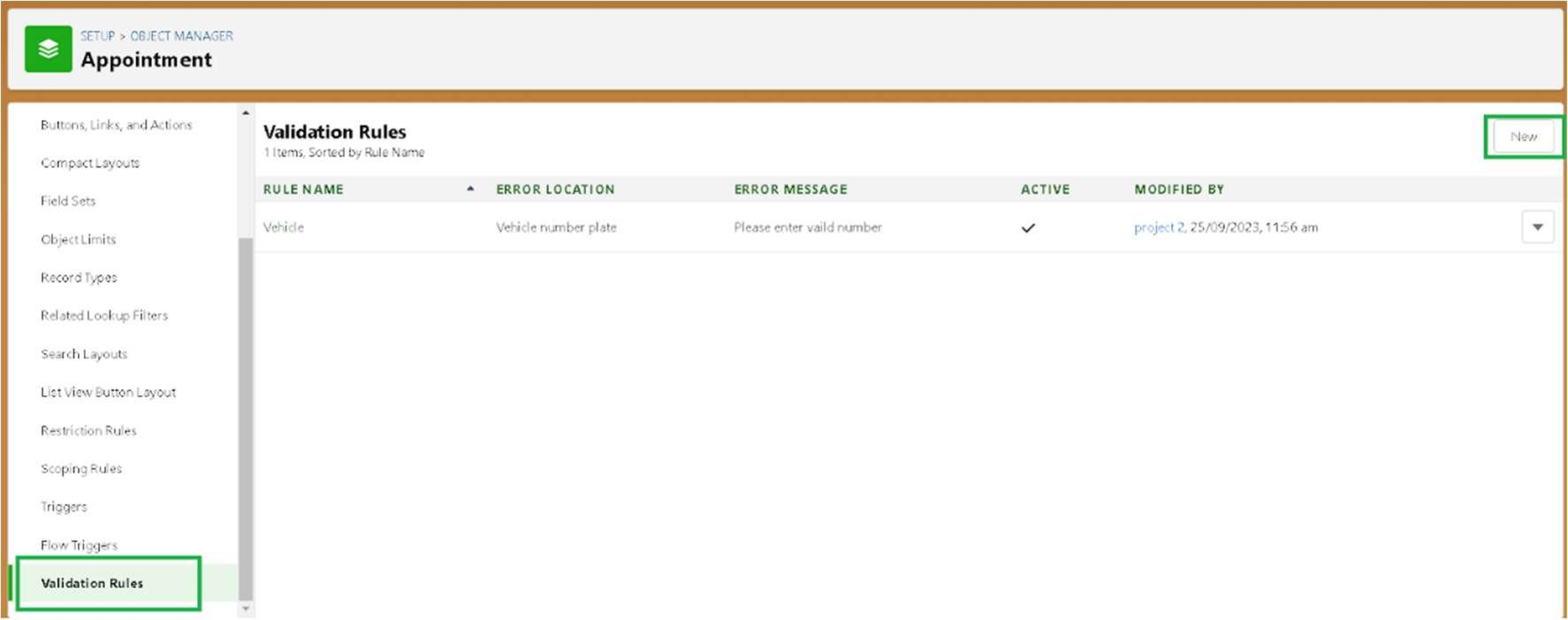

Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
Vehicle number plate
Please enter the maximum length for a text field below.
Length
10
Field Name
Vehicle_number_plate
Description
Help Text
Required
Always require a value in this field in order to save a record
Unique
Do not allow 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
Auto add to custom report type
Add this field to existing custom report types that contain this entity

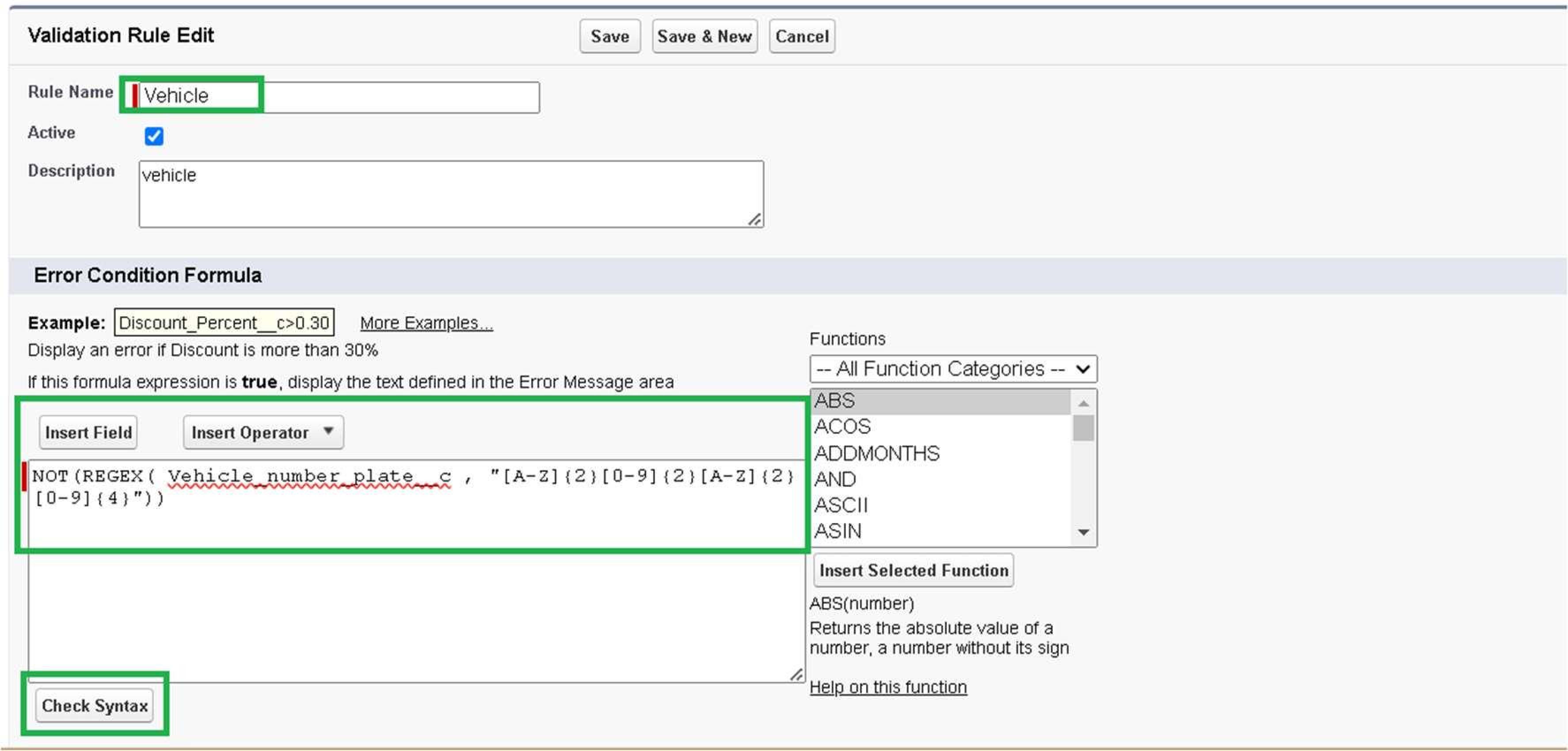

New Custom Field
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
Service Status
Values
Use global picklist value set
Enter values, with each value separated by a new line
Started
Completed
Display values alphabetically, not in the order entered
Use first value as default value
Restrict picklist to the values defined in the value set
Field Name
Service_Status
Description


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

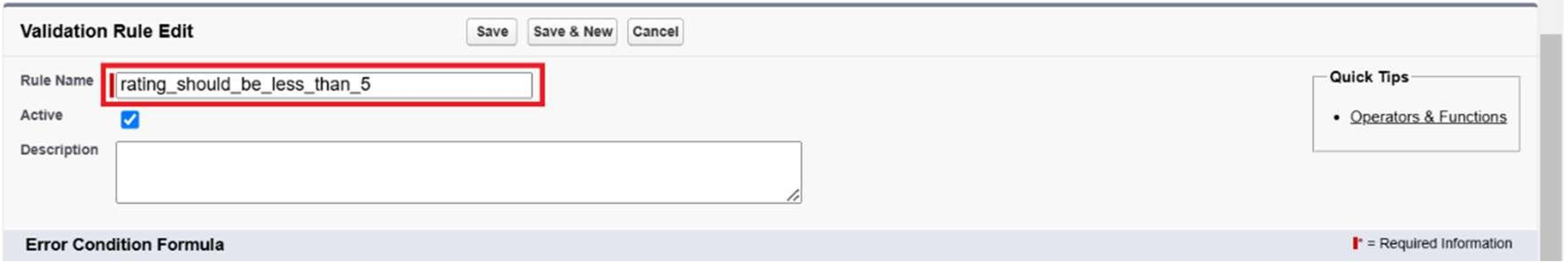

Insert Field
Select a field, then click Insert. Labels followed by a ">" indicate that there are more fields available.
Service records >
$Api >
$Label >
$Organization >
$Profile >
$System >
$User >
$UserRole >
Appointment
Appointment >
Created By >
Created By ID
Created Date
Last Activity Date
Last Modified By >
Last Modified By ID
Last Modified Date
You have selected:
CreatedDate
Type: Date/Time
API Name: CreatedDate
Insert
Close

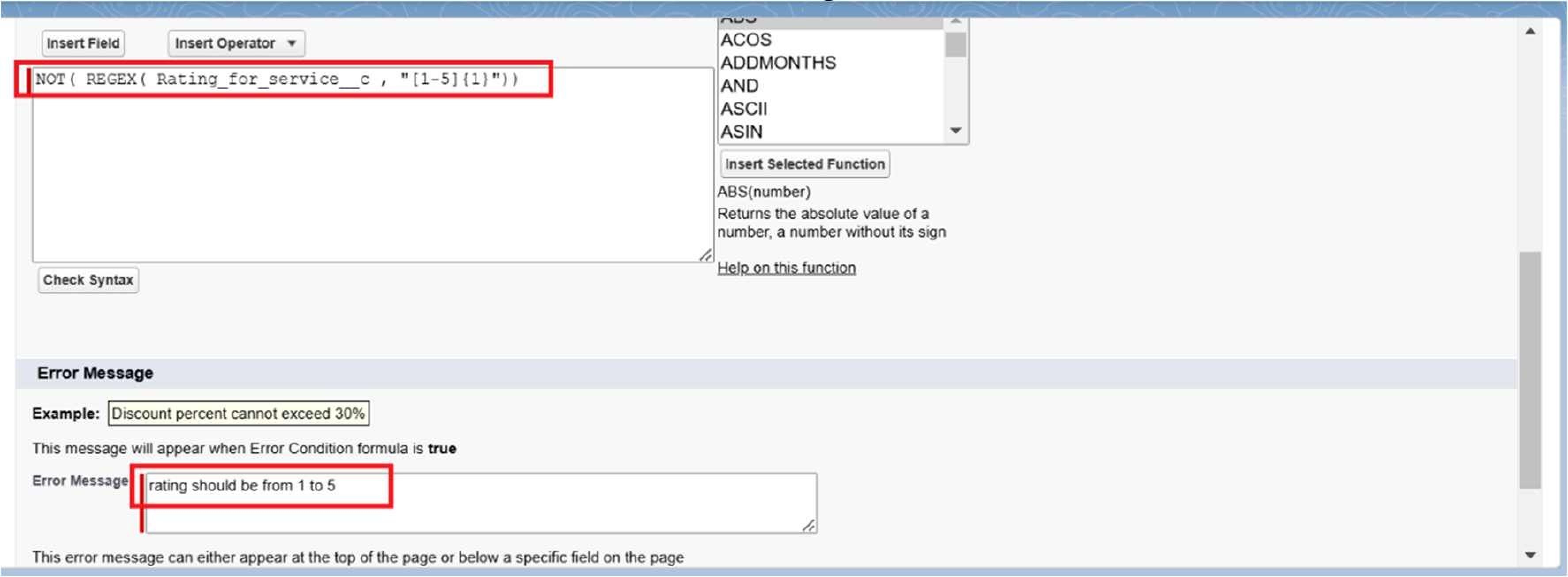

Step 3. Enter formula
Step 3 of 5
Previous
Next
Cancel
Quick Tips
Getting Started
Operators & Functions
Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.
Example:
Reminder Date = CloseDate - 7
More Examples...
Simple Formula
Advanced Formula
Insert Field
Insert Operator
Functions
-- All Function Categories --
service dates (Date) =
CreatedDate
ABS
ACOS
ADDMONTHS
AND
ASCII


SETUP > OBJECT MANAGER
Appointment
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules
Validation Rules
1 Items, Sorted by Rule Name
New
RULE NAME
ERROR LOCATION
ERROR MESSAGE
ACTIVE
MODIFIED BY
Vehicle
Vehicle number plate
Please enter vaild number
project 2, 25/09/2023, 11:56 am

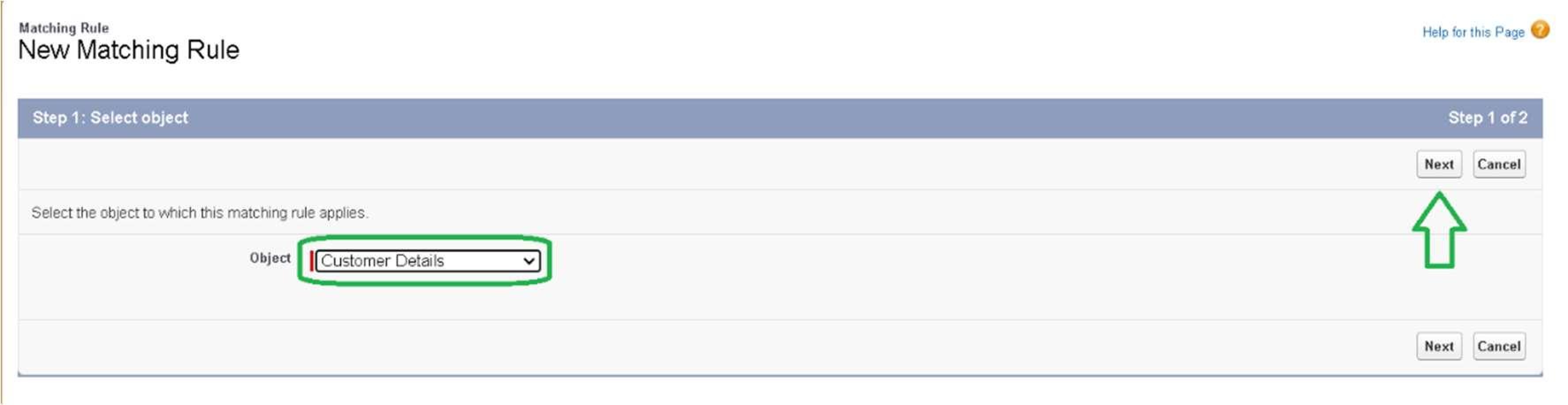

Validation Rule Edit
Save
Save & New
Cancel
Rule Name
Vehicle
Active
Description
vehicle
Error Condition Formula
Example:
Discount_Percent__c>0.30
More Examples...
Display an error if Discount is more than 30%
If this formula expression is true, display the text defined in the Error Message area
Insert Field
Insert Operator
NOT(REGEX(Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))
Check Syntax
Functions
-- All Function Categories --
ABS
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

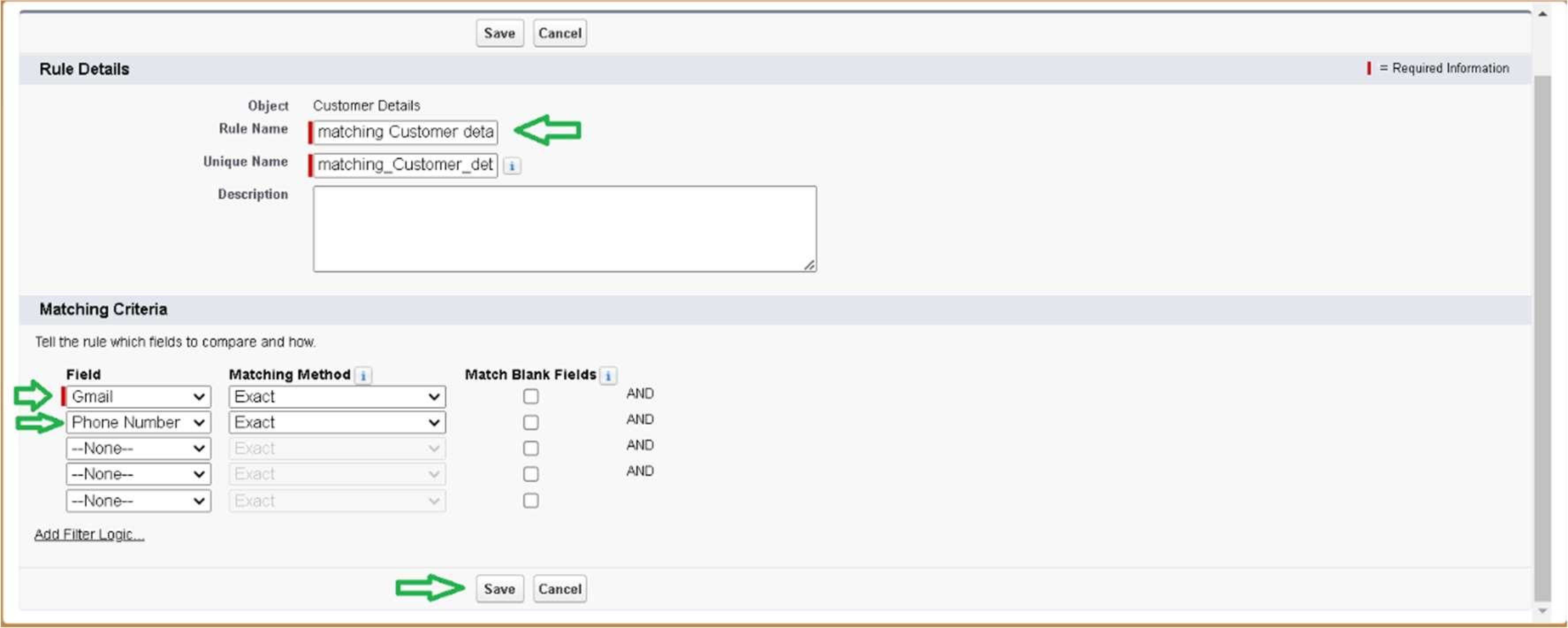

Error Message
Example: Discount percent cannot exceed 30%
This message will appear when Error Condition formula is true
Error Message
Please enter vaild number
This error message can either appear at the top of the page or below a specific field on the page
Error Location
Top of Page
Field
Vehicle number plate
Save
Save & New
Cancel


Validation Rule Edit
Save
Save & New
Cancel
Rule Name
rating_should_be_less_than_5
Active
Description
Quick Tips
Operators & Functions
Error Condition Formula
= Required Information


Insert Field
Insert Operator
NOT(REGEX(Rating_for_service__c , "[1-5]{1}"))
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
Error Message
Example: Discount percent cannot exceed 30%
This message will appear when Error Condition formula is true
Error Message
rating should be from 1 to 5
This error message can either appear at the top of the page or below a specific field on the page


Setup
Home
Object Manager
matching
Data
Duplicate Management
Matching Rules
Didn't find what you're looking for? Try using Global Search.
SETUP
Matching Rules
All Matching Rules
Help for this Page
What Are Matching Rules?
[Expand]
View: All Matching Rules
Create New View
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
New Rule
Action
Rule Name
Object
Status
Description
Last Modified Date
Last Modified By


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


Save Cancel

Rule Details

| = Required Information

Object	Customer Details
Rule Name	matching Customer deta
Unique Name	matching_Customer_det
Description	

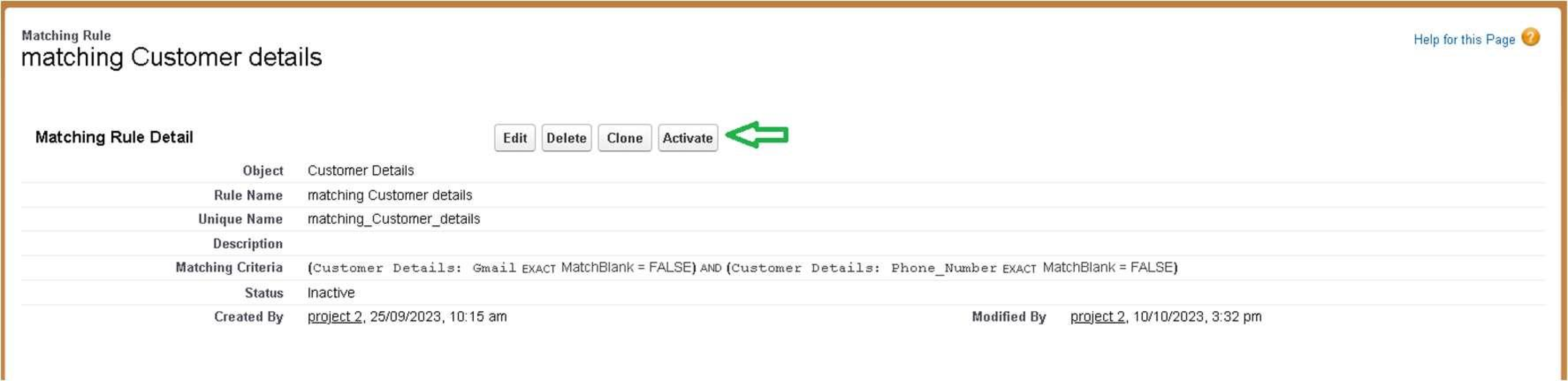
Matching Criteria

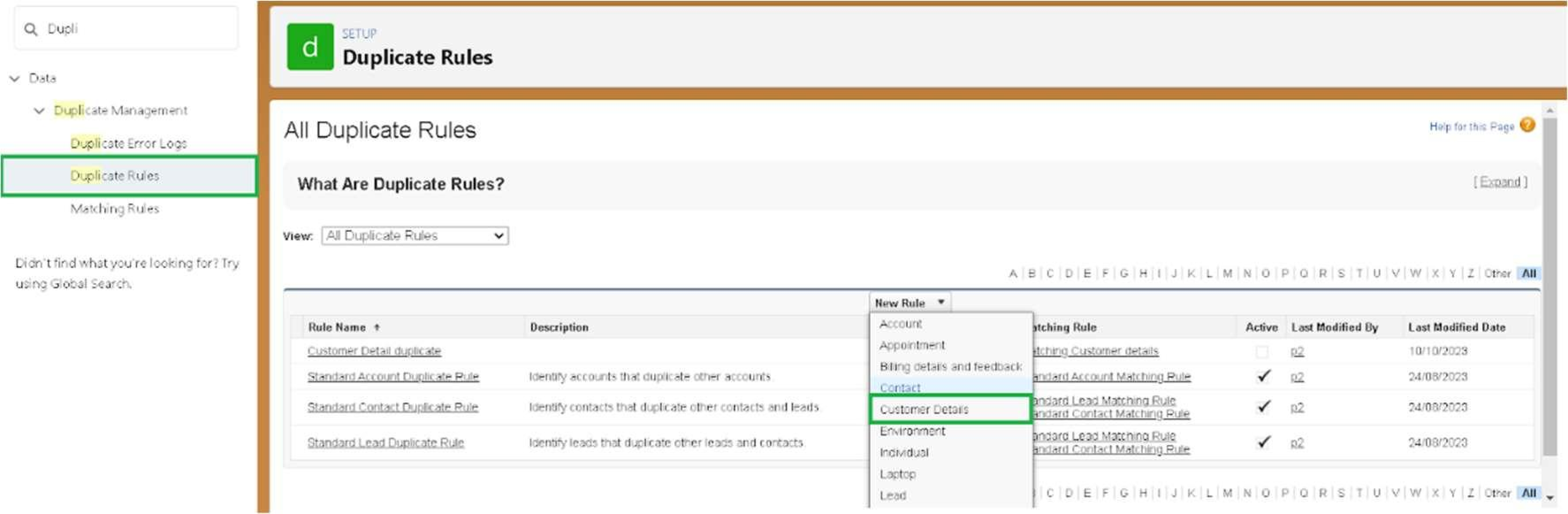
Tell the rule which fields to compare and how.

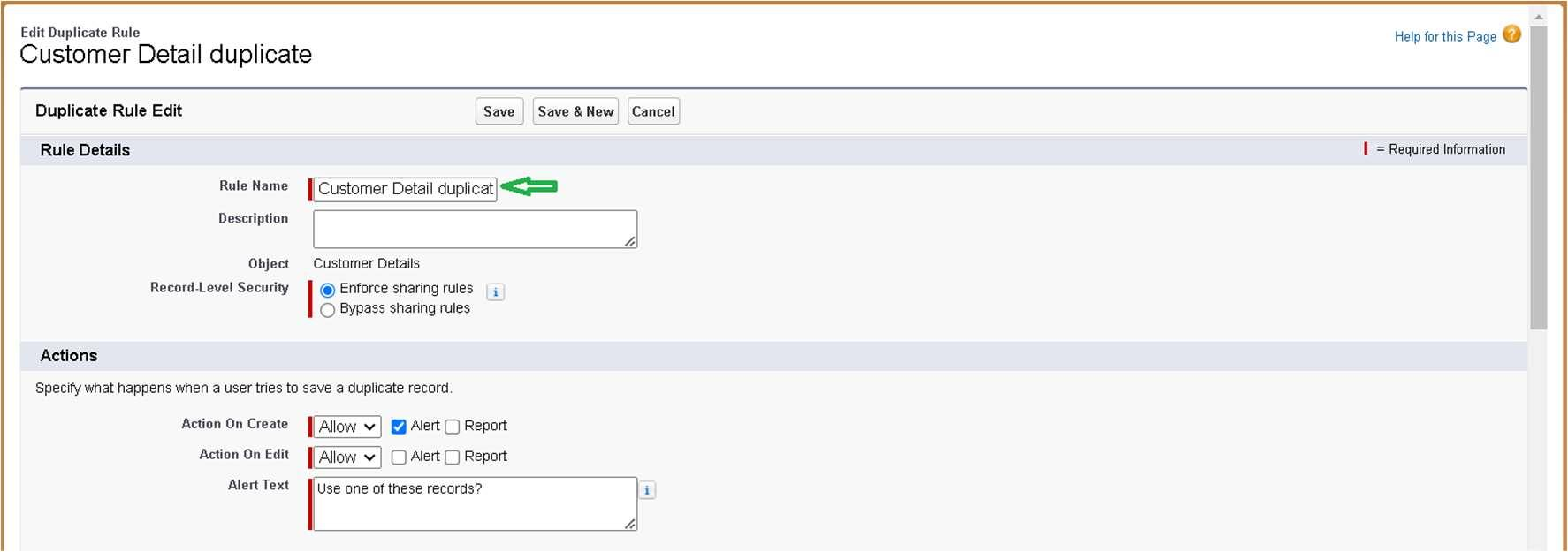
Field	Matching Method	Match Blank Fields	
Gmail	Exact	☐	AND
Phone Number	Exact	☐	AND
--None--	Exact	☐	AND
--None--	Exact	☐	AND
--None--	Exact	☐	

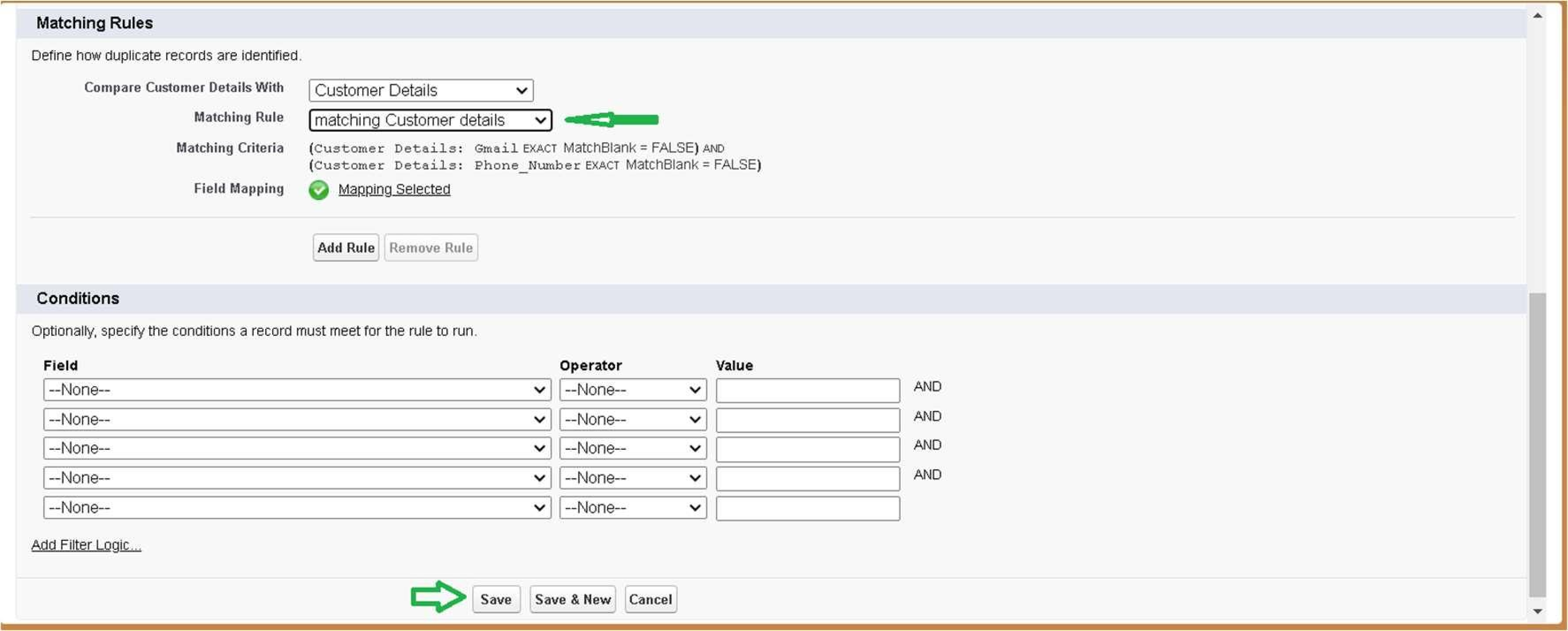
Add Filter Logic...

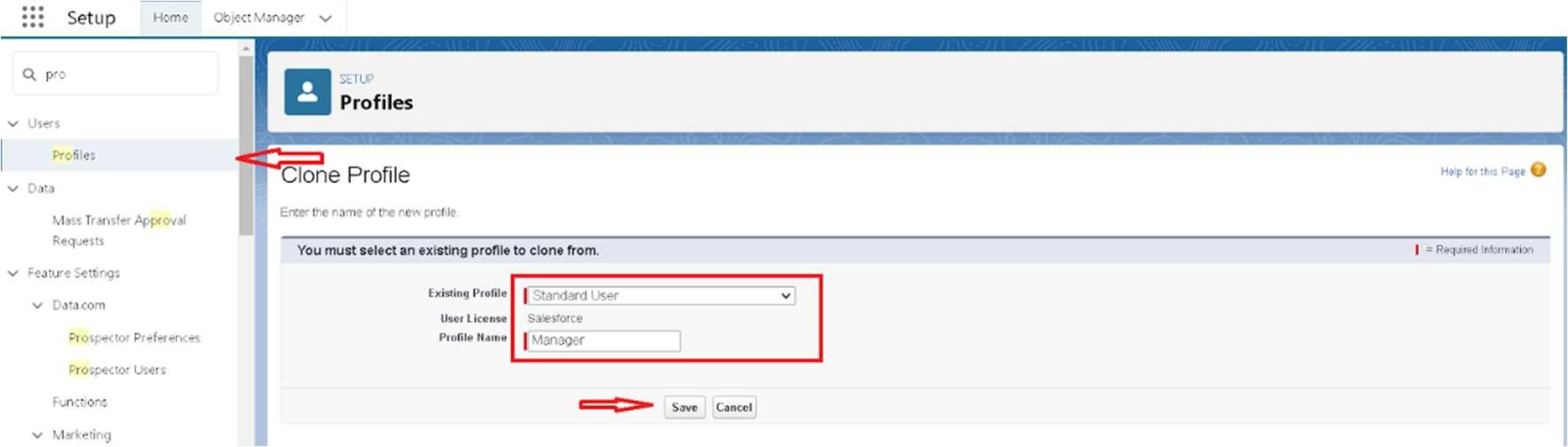
Save Cancel


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
project 2, 25/09/2023, 10:15 am
Modified By
project 2, 10/10/2023, 3:32 pm


Dupli
Data
Duplicate Management
Duplicate Error Logs
Duplicate Rules
Matching Rules
Didn't find what you're looking for? Try using Global Search.
SETUP
Duplicate Rules
All Duplicate Rules
Help for this Page
What Are Duplicate Rules?
[Expand]
View: All Duplicate Rules
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
New Rule
Account
Appointment
Billing details and feedback
Contact
Customer Details
Environment
Individual
Laptop
Lead
Rule Name
Description
Active
Last Modified By
Last Modified Date
Customer Detail duplicate
10/10/2023
Standard Account Duplicate Rule
Identify accounts that duplicate other accounts
24/08/2023
Standard Contact Duplicate Rule
Identify contacts that duplicate other contacts and leads
24/08/2023
Standard Lead Duplicate Rule
Identify leads that duplicate other leads and contacts
24/08/2023


Edit Duplicate Rule
Customer Detail duplicate
Help for this Page
Duplicate Rule Edit
Save
Save & New
Cancel
Rule Details
= Required Information
Rule Name
Customer Detail duplicat
Description
Object
Customer Details
Record-Level Security
Enforce sharing rules
Bypass sharing rules
Actions
Specify what happens when a user tries to save a duplicate record.
Action On Create
Allow
Alert
Report
Action On Edit
Allow
Alert
Report
Alert Text
Use one of these records?


Matching Rules
Define how duplicate records are identified.
Compare Customer Details With
Customer Details
Matching Rule
matching Customer details
Matching Criteria
(Customer Details: Gmail EXACT MatchBlank = FALSE) AND
(Customer Details: Phone_Number EXACT MatchBlank = FALSE)
Field Mapping
Mapping Selected
Add Rule
Remove Rule
Conditions
Optionally, specify the conditions a record must meet for the rule to run.
Field
Operator
Value
--None--
--None--
AND
--None--
--None--
AND
--None--
--None--
AND
--None--
--None--
AND
--None--
--None--
Add Filter Logic...
Save
Save & New
Cancel


Setup
Home
Object Manager
pro
Users
Profiles
Data
Mass Transfer Approval Requests
Feature Settings
Data.com
Prospector Preferences
Prospector Users
Functions
Marketing
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

Profile

Manager

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.

Login IP Ranges [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled External Credential Principal Access [0] | Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]

Profile Detail

Edit | Clone | Delete | View Users

Name	Manager		
User License	Salesforce	Custom Profile	✓
Description			
Created By	sunny 1, 13/06/2023, 2:40 pm	Modified By	sunny 1, 13/06/2023, 2:40 pm

Page Layouts

Data Manager (standard__DataManager)	☑	○
Digital Experiences (standard__SalesforceCMS)	☑	○
Garage Management Application (Garage_Management_Application)	☑	◉
Laptop Hub (Laptop_Hub)	☐	○
(standard__ServiceConsole)	☐	○
Service (standard__Service)	☑	○
Service Console (standard__LightningService)	☑	○
Site.com (standard__Sites)	☑	○
Subscription Management (standard__RevenueCloudConsole)	☑	○

Custom Object Permissions

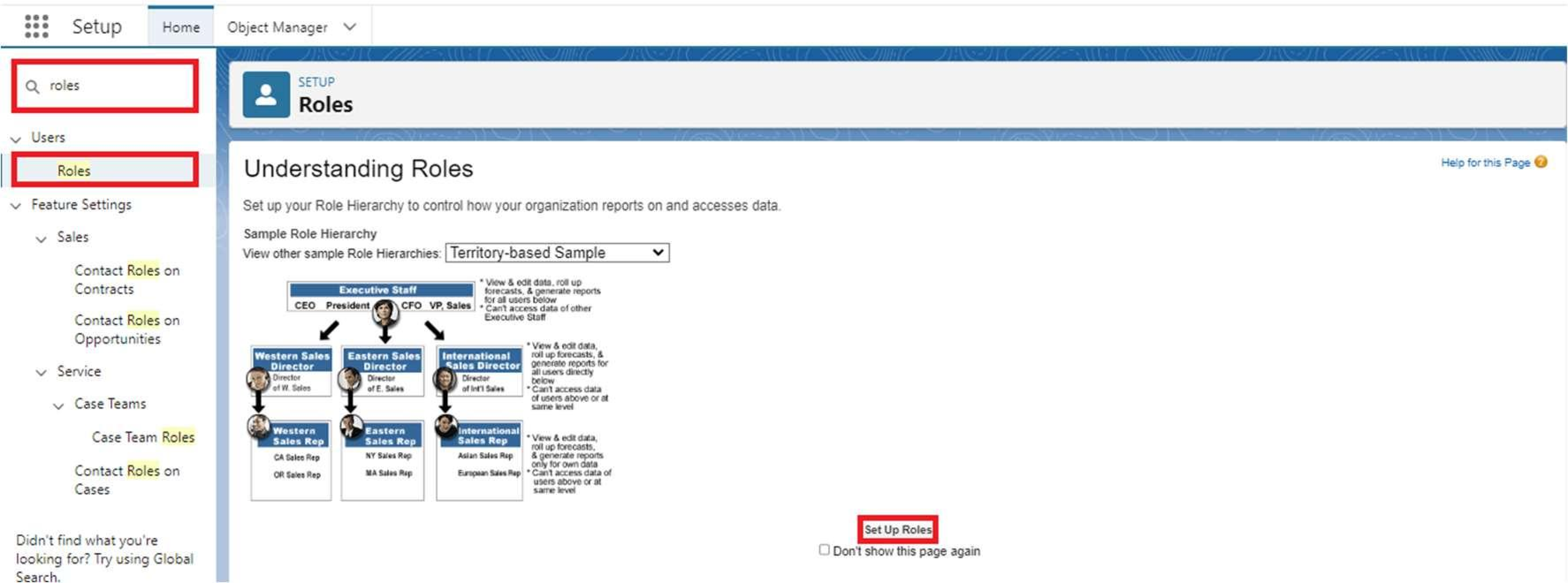
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Appointments	☑	☐	☑	☑	☑	☑
Billing details and feedback	☑	☐	☑	☑	☑	☑
Customer Details	☑	☐	☑	☑	☑	☑
Environments	☐	☐	☐	☐	☐	☐

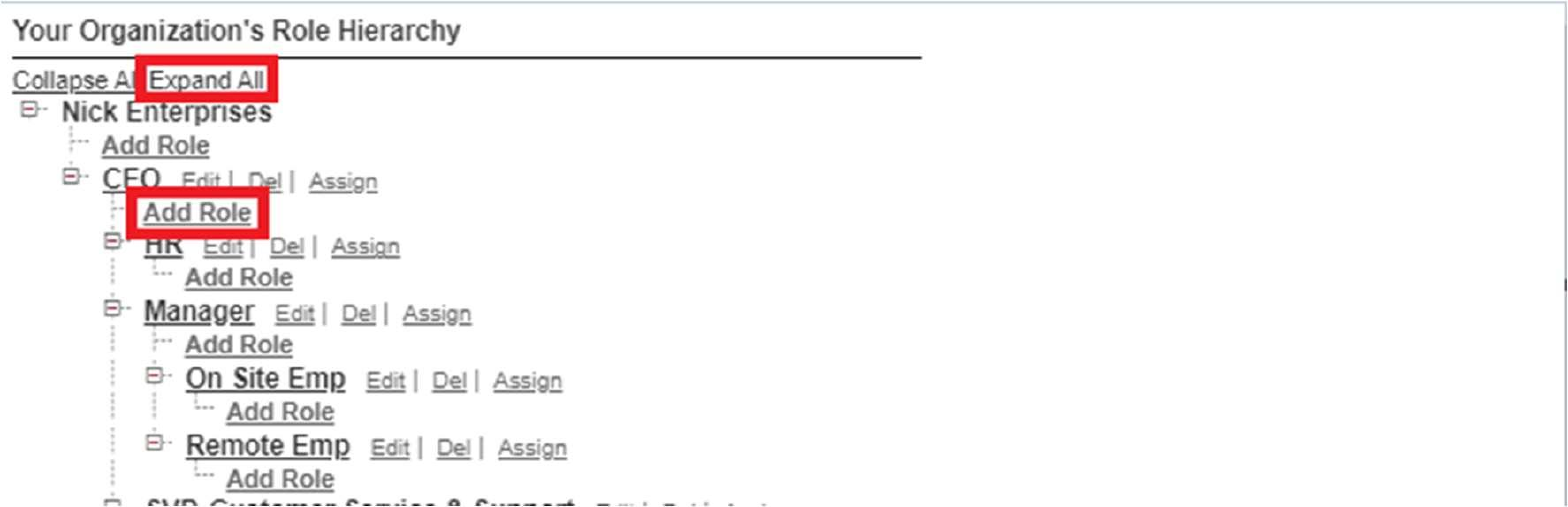
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Laptops	☐	☐	☐	☐	☐	☐
Service records	☑	☐	☑	☑	☑	☑
SessionData	☐	☐	☐	☐	☐	☐

Custom Object Permissions

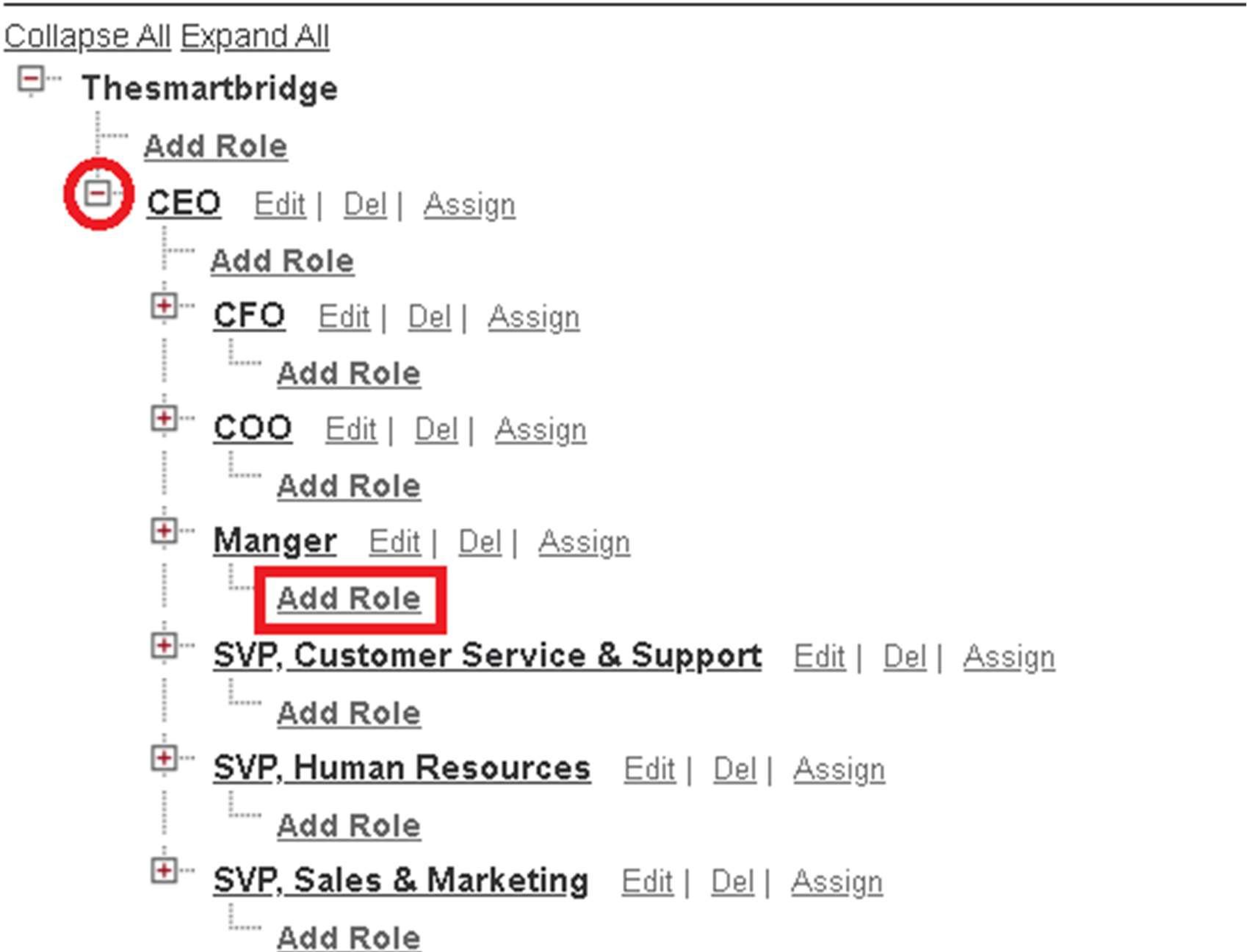
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Appointments	☑	☐	☐	☐	☐	☐
Billing details and feedback	☑	☐	☐	☐	☐	☐
Customer Details	☑	☐	☐	☐	☐	☐
Environments	☐	☐	☐	☐	☐	☐

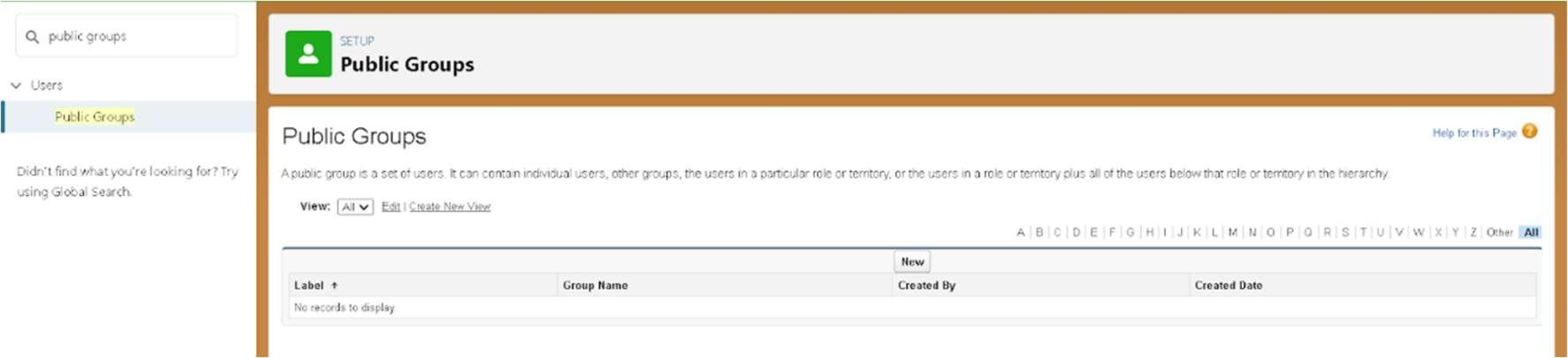
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Laptops	☐	☐	☐	☐	☐	☐
Service records	☑	☑	☐	☐	☐	☐
SessionData	☐	☐	☐	☐	☐	☐

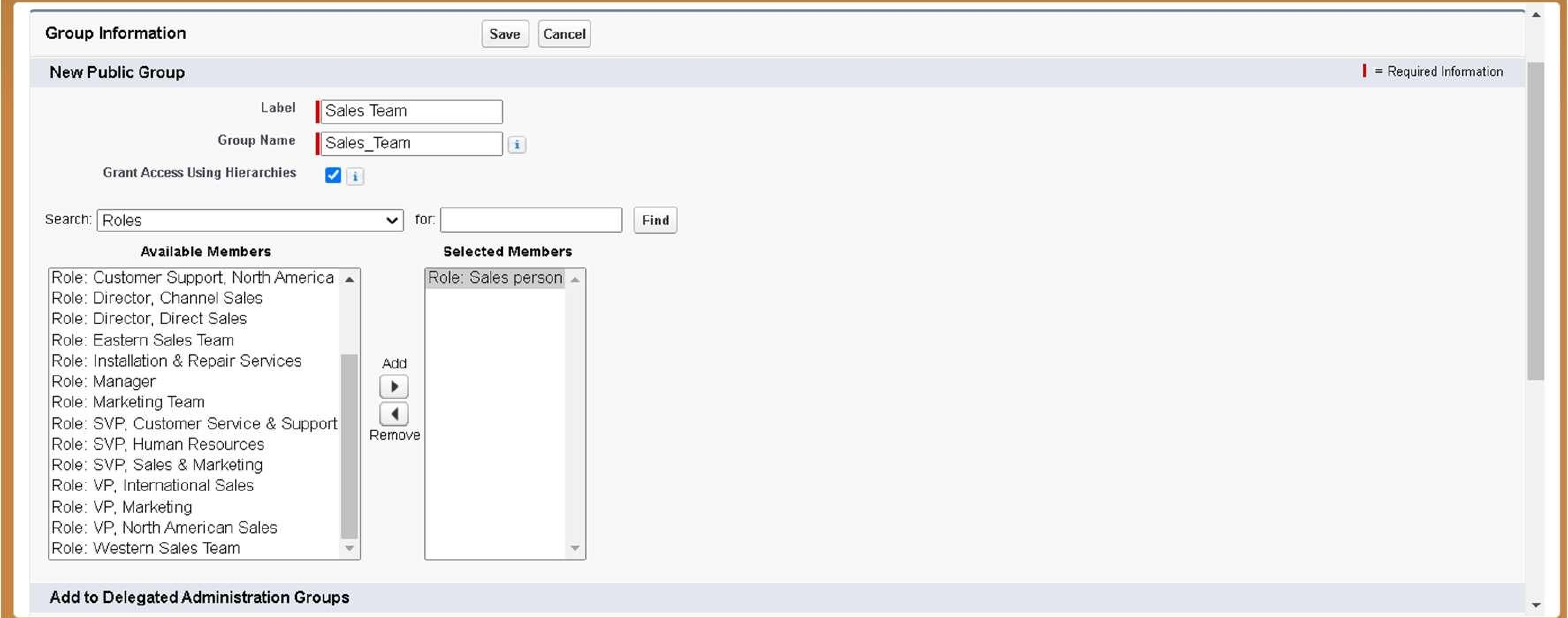

Setup
Home
Object Manager
roles
Users
Roles
Feature Settings
Sales
Contact Roles on Contracts
Contact Roles on Opportunities
Service
Case Teams
Case Team Roles
Contact Roles on Cases
Didn't find what you're looking for? Try using Global Search.
SETUP
Roles
Understanding Roles
Help for this Page
Set up 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
* View & edit data, roll up forecasts, & generate reports for all users below
* Can't access data of other Executive Staff
Western Sales Director
Director of W. Sales
Eastern Sales Director
Director of E. Sales
International Sales Director
Director of Int'l Sales
* View & edit data, roll up forecasts, & generate reports for all users directly below
* Can't access data of users above or at same level
Western Sales Rep
CA Sales Rep
OR Sales Rep
Eastern Sales Rep
NY Sales Rep
MA Sales Rep
International Sales Rep
Asian Sales Rep
European Sales Rep
* View & edit data, roll up forecasts, & generate reports only for own data
* Can't access data of users above or at same level
Set Up Roles
Don't show this page again

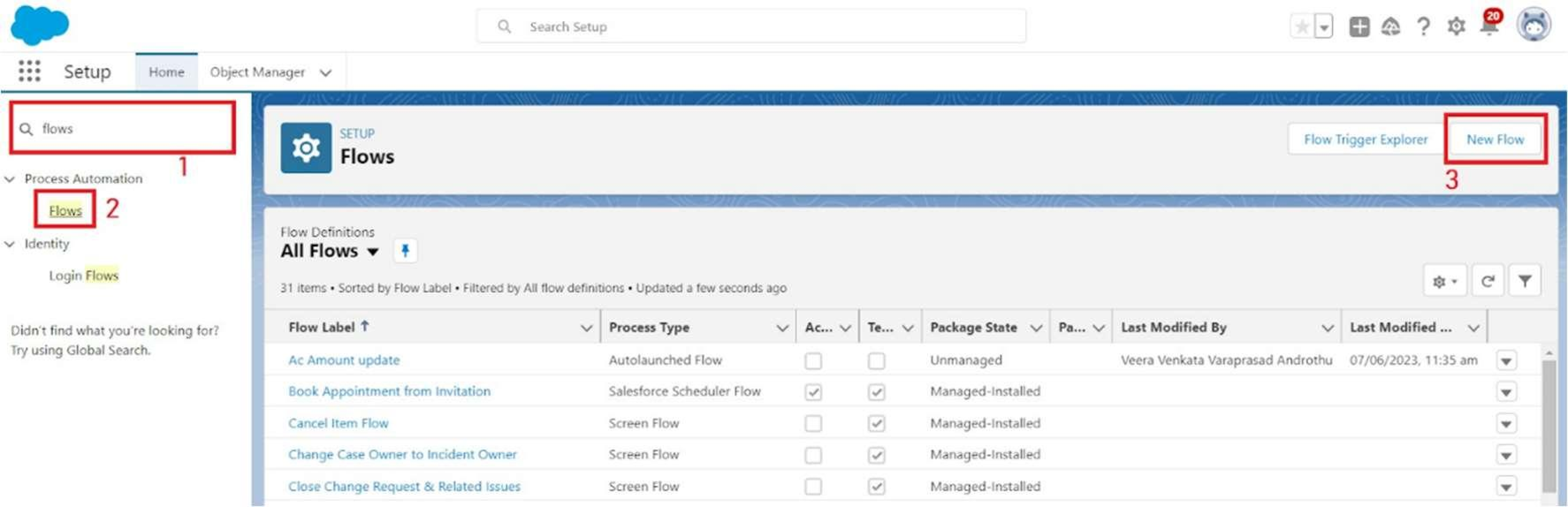

Your Organization's Role Hierarchy
Collapse All
Expand All
Nick Enterprises
Add Role
CEO Edit | Del | Assign
Add Role
HR Edit | Del | Assign
Add Role
Manager Edit | Del | Assign
Add Role
On Site Emp Edit | Del | Assign
Add Role
Remote Emp Edit | Del | Assign
Add Role

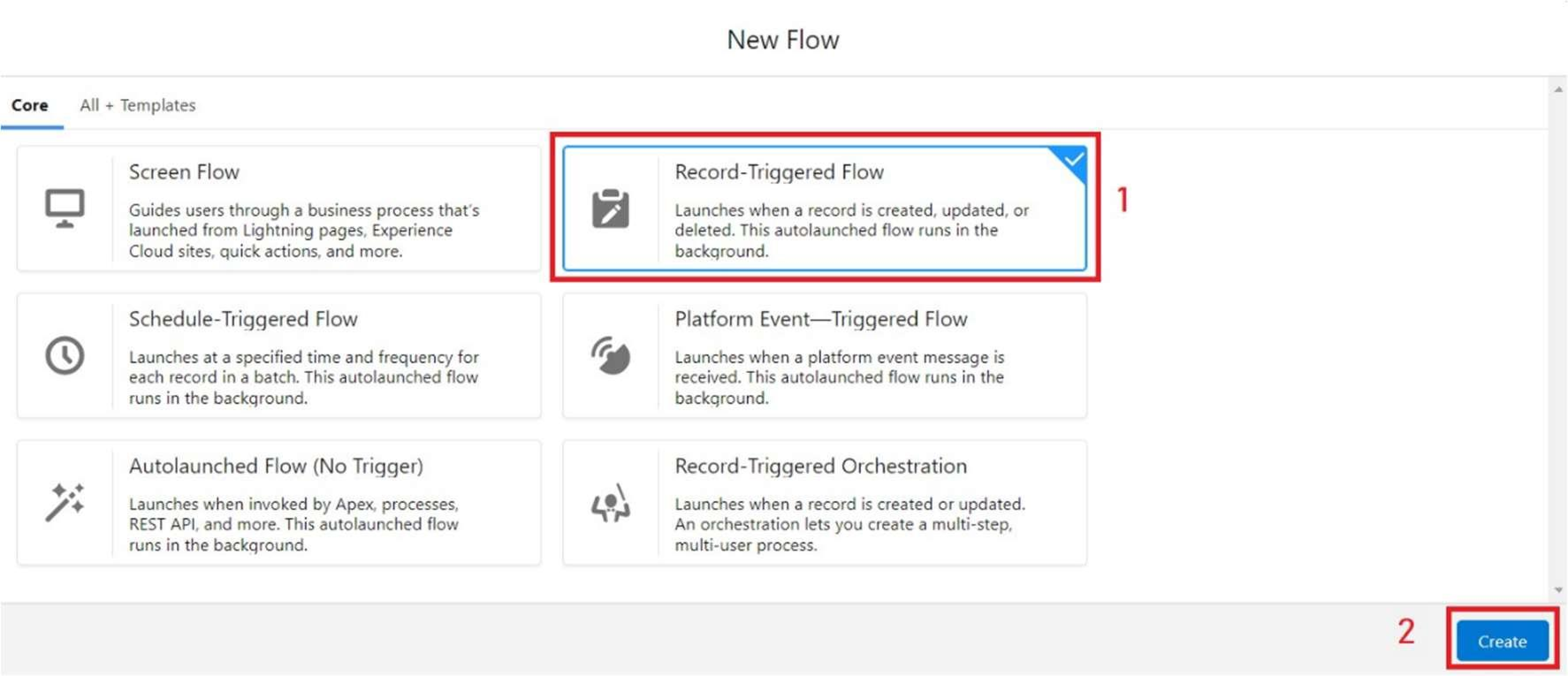

Role Edit
Label
Manger
Role Name
Manger
This role reports to
CEO
Role Name as displayed on reports
Save
Save & New
Cancel

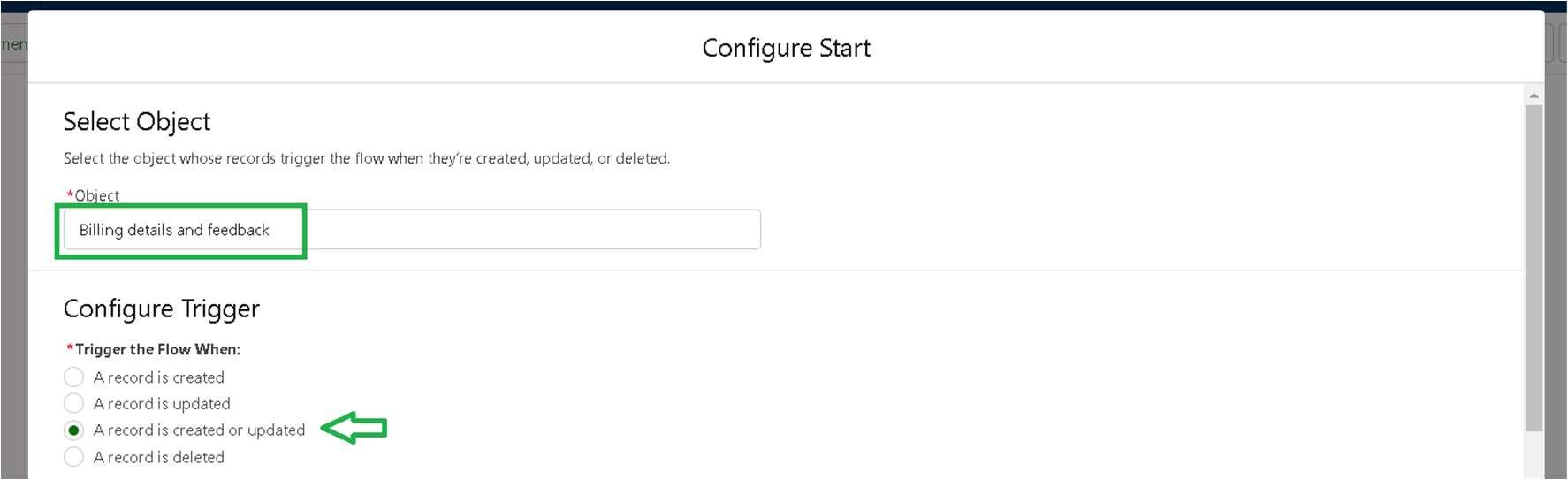

Collapse All Expand All
Thesmartbridge
Add Role
CEO Edit | Del | Assign
Add Role
CFO Edit | Del | Assign
Add Role
COO Edit | Del | Assign
Add Role
Manger Edit | Del | Assign
Add Role
SVP, Customer Service & Support Edit | Del | Assign
Add Role
SVP, Human Resources Edit | Del | Assign
Add Role
SVP, Sales & Marketing Edit | Del | Assign
Add Role


public groups
Users
Public Groups
Didn't find what you're looking for? Try using Global Search.
SETUP
Public Groups
Public Groups
Help for this Page
A public group is a set of users. It can contain individual users, other groups, the users in a particular role or territory, or the users in a role or territory plus all of the users below that role or territory in the hierarchy.
View: All
Edit | Create New View
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
New
Label
Group Name
Created By
Created Date
No records to display

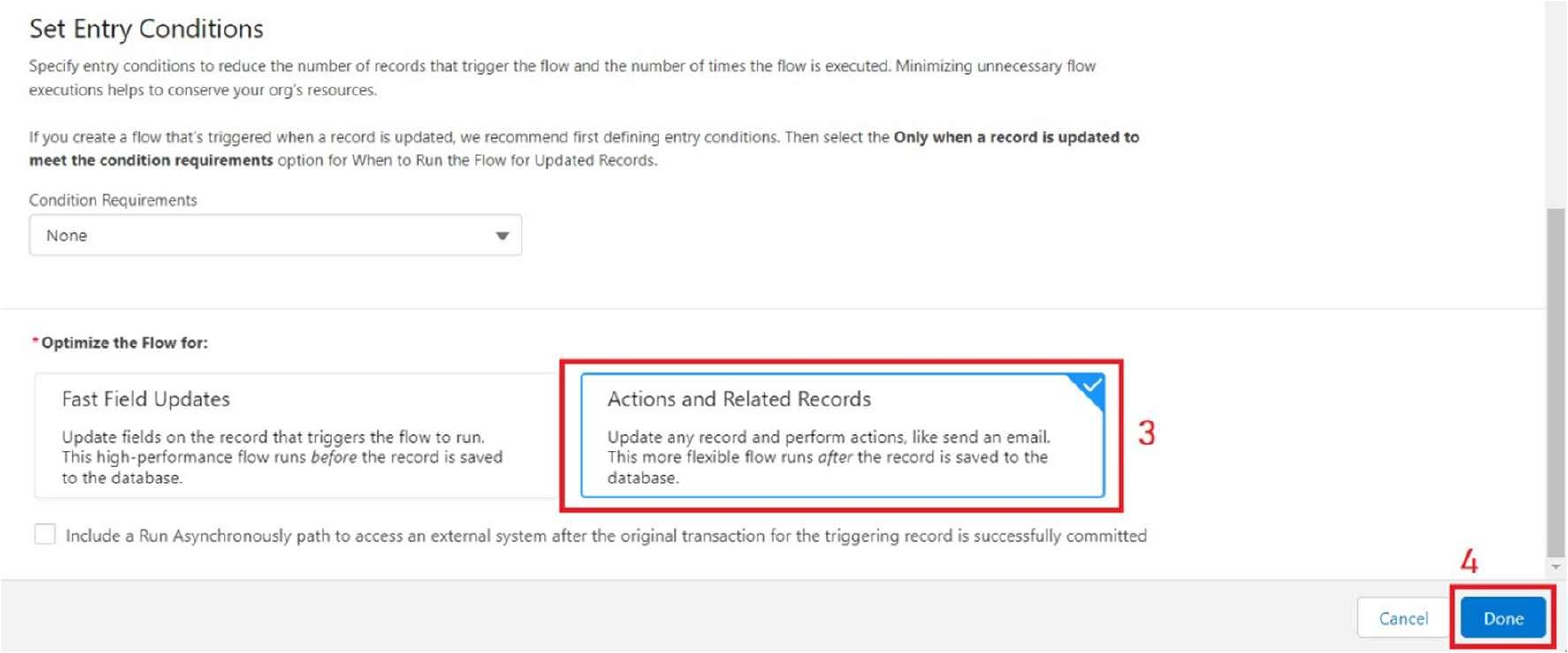

Group Information
Save
Cancel
New Public Group
= Required Information
Label
Sales Team
Group Name
Sales_Team
Grant Access Using Hierarchies
Search:
Roles
for:
Find
Available Members
Role: Customer Support, North America
Role: Director, Channel Sales
Role: Director, Direct Sales
Role: Eastern Sales Team
Role: Installation & Repair Services
Role: Manager
Role: Marketing Team
Role: SVP, Customer Service & Support
Role: SVP, Human Resources
Role: SVP, Sales & Marketing
Role: VP, International Sales
Role: VP, Marketing
Role: VP, North American Sales
Role: Western Sales Team
Add
Remove
Selected Members
Role: Sales person
Add to Delegated Administration Groups

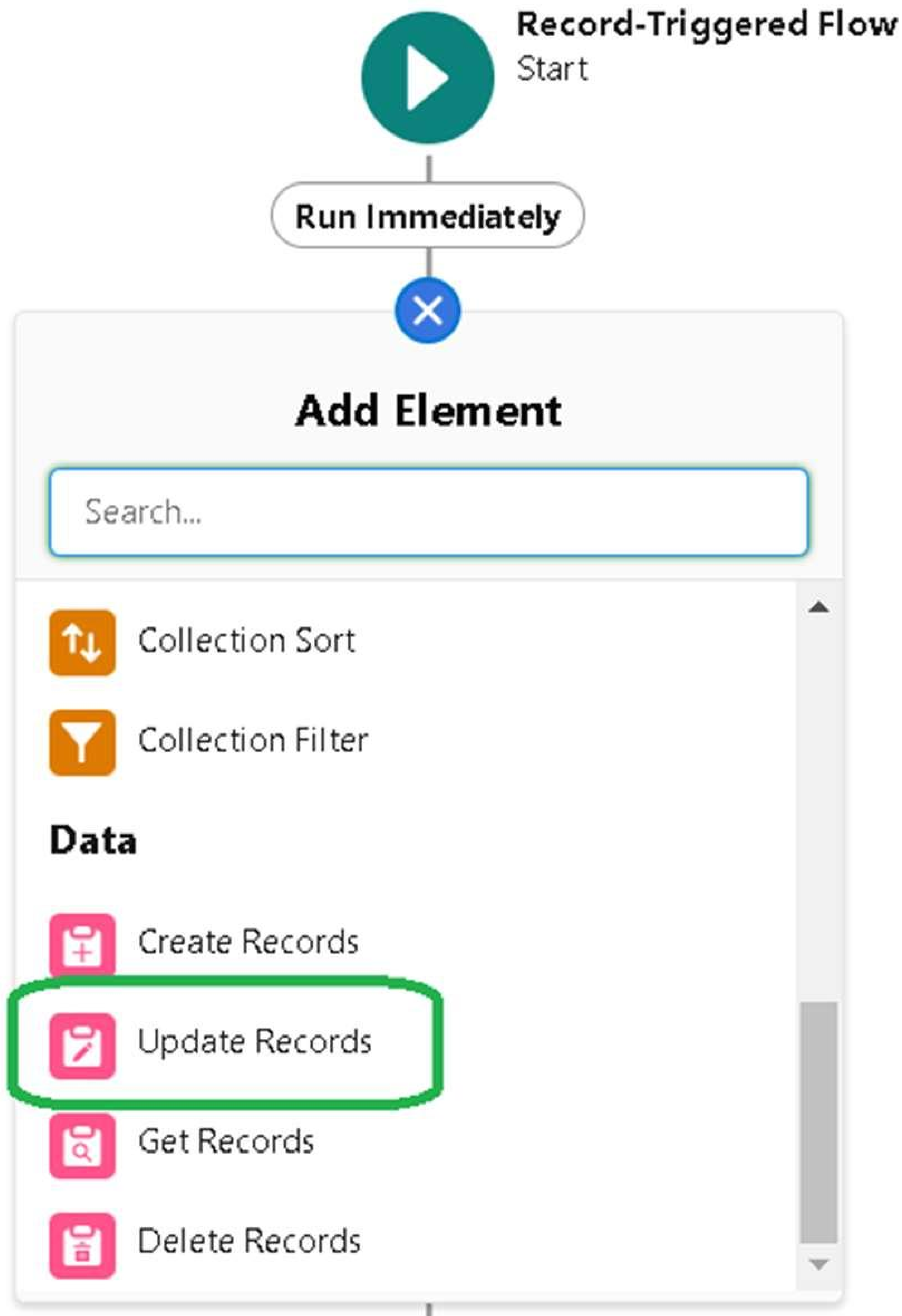

Search Setup
20
Setup
Home
Object Manager
flows
1
Process Automation
Flows
2
Identity
Login Flows
Didn't find what you're looking for?
Try using Global Search.
SETUP
Flows
Flow Trigger Explorer
New Flow
3
Flow Definitions
All Flows
31 items • Sorted by Flow Label • Filtered by All flow definitions • Updated a few seconds ago
Flow Label
Process Type
Ac...
Te...
Package State
Pa...
Last Modified By
Last Modified ...
Ac Amount update
Autolaunched Flow
Unmanaged
Veera Venkata Varaprasad Androthu
07/06/2023, 11:35 am
Book Appointment from Invitation
Salesforce Scheduler Flow
Managed-Installed
Cancel Item Flow
Screen Flow
Managed-Installed
Change Case Owner to Incident Owner
Screen Flow
Managed-Installed
Close Change Request & Related Issues
Screen Flow
Managed-Installed


New Flow
Core
All + Templates
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.
1
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.
2
Create

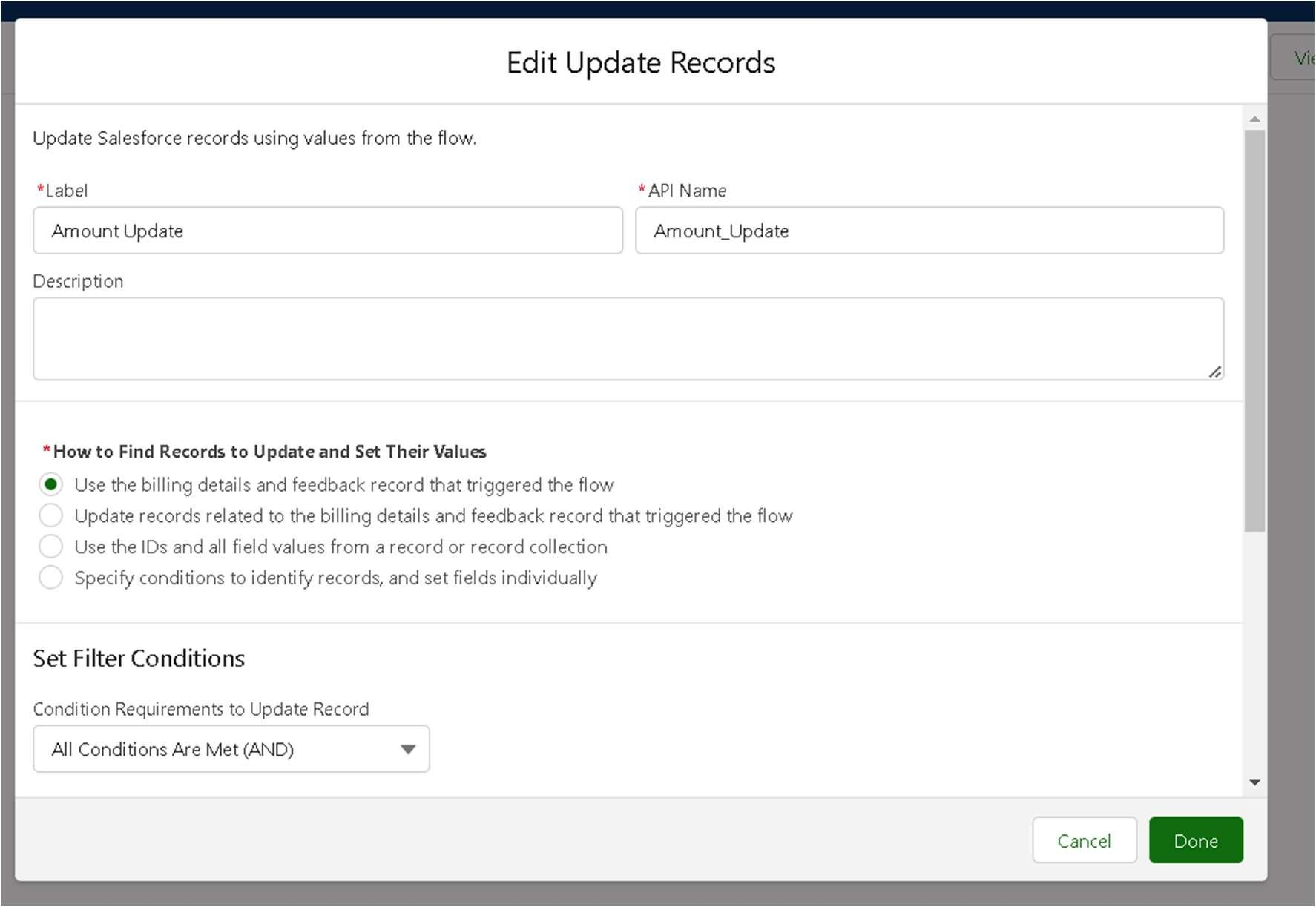


Configure Start
Select Object
Select the object whose records trigger the flow when they're created, updated, or deleted.
*Object
Billing details and feedback
Configure Trigger
*Trigger the Flow When:
A record is created
A record is updated
A record is created or updated
A record is deleted

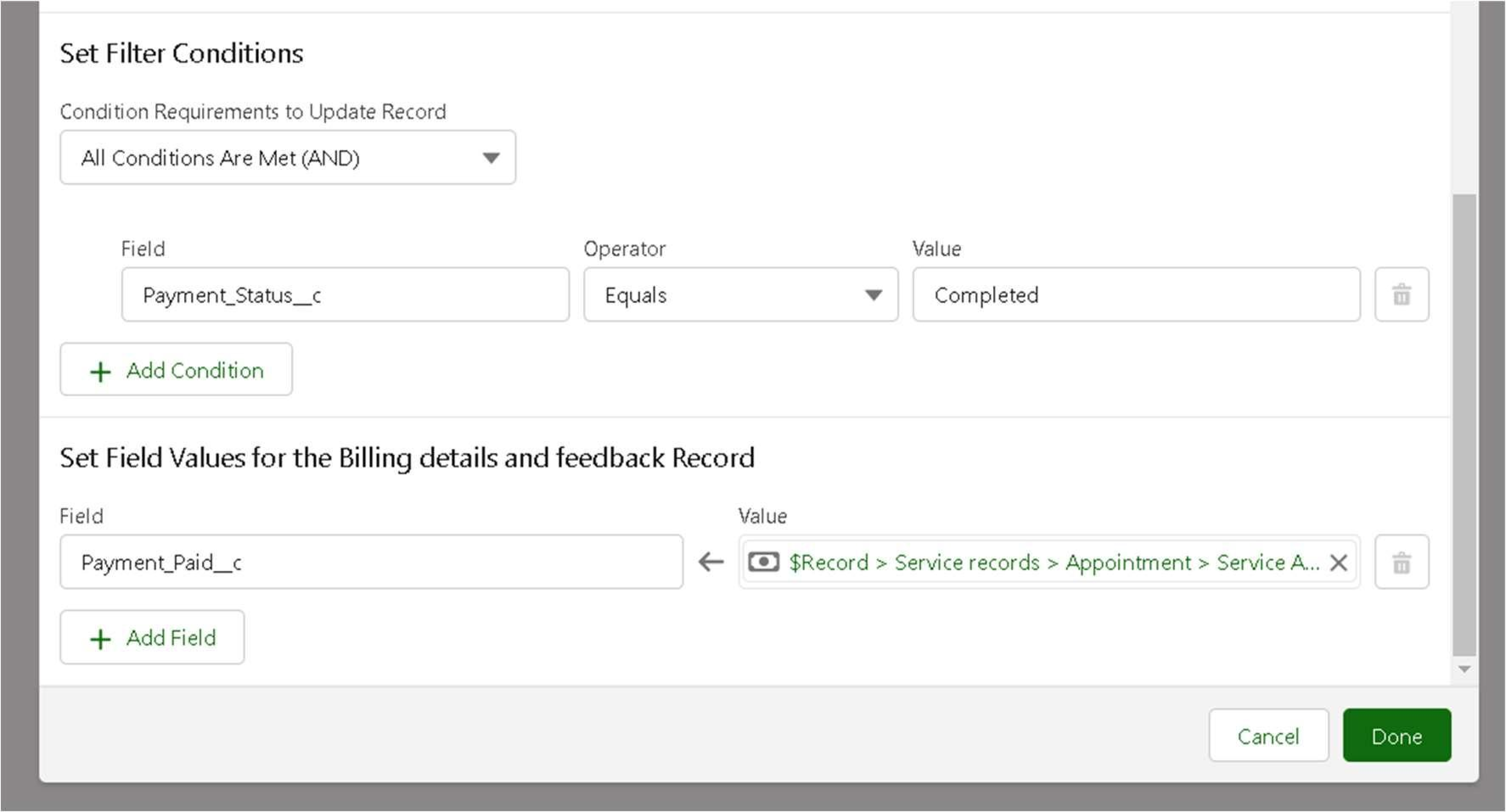

Set Entry Conditions
Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.
If you create a flow that's triggered when a record is updated, we recommend 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
* 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.
3
Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed
4
Cancel
Done

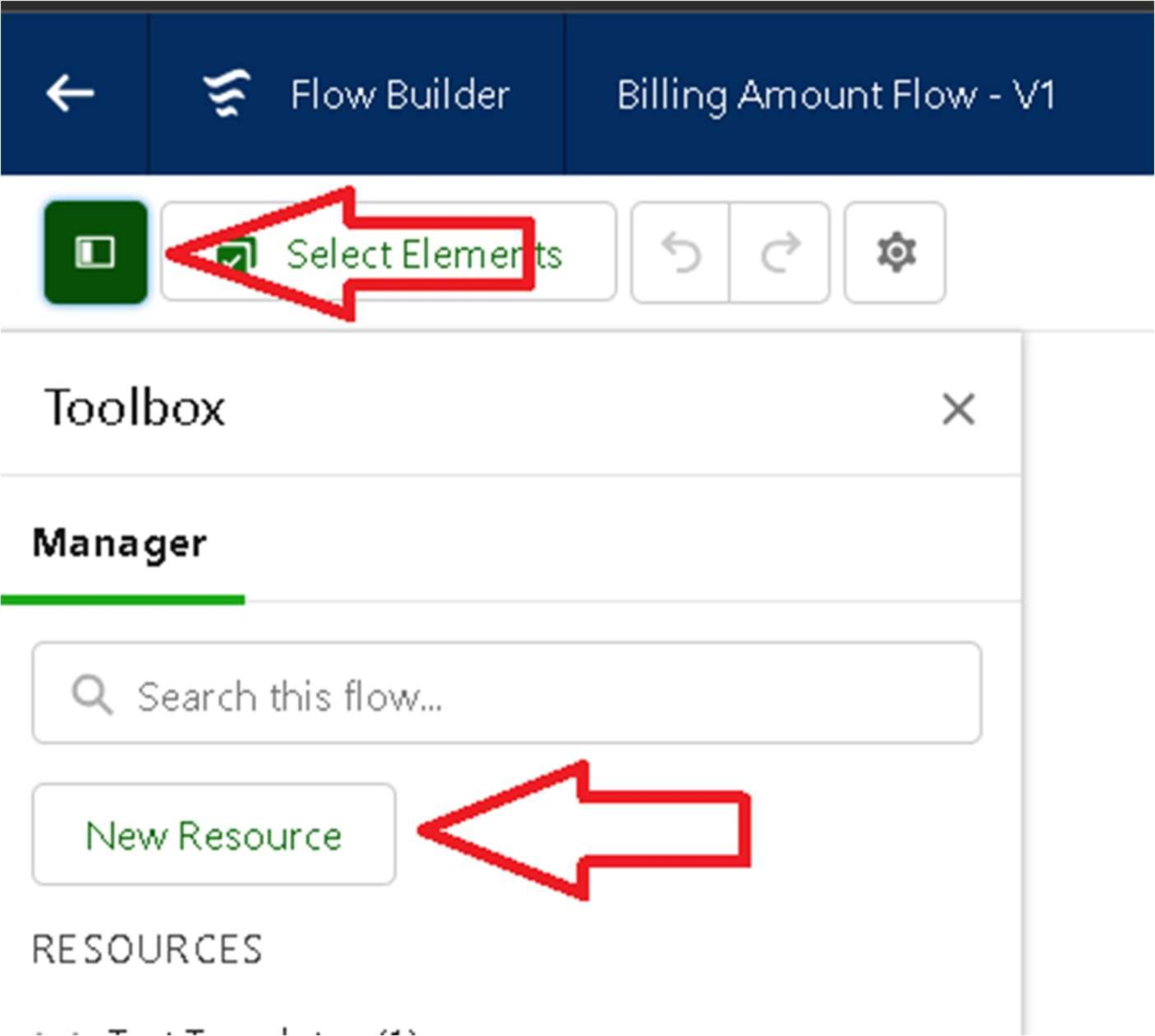


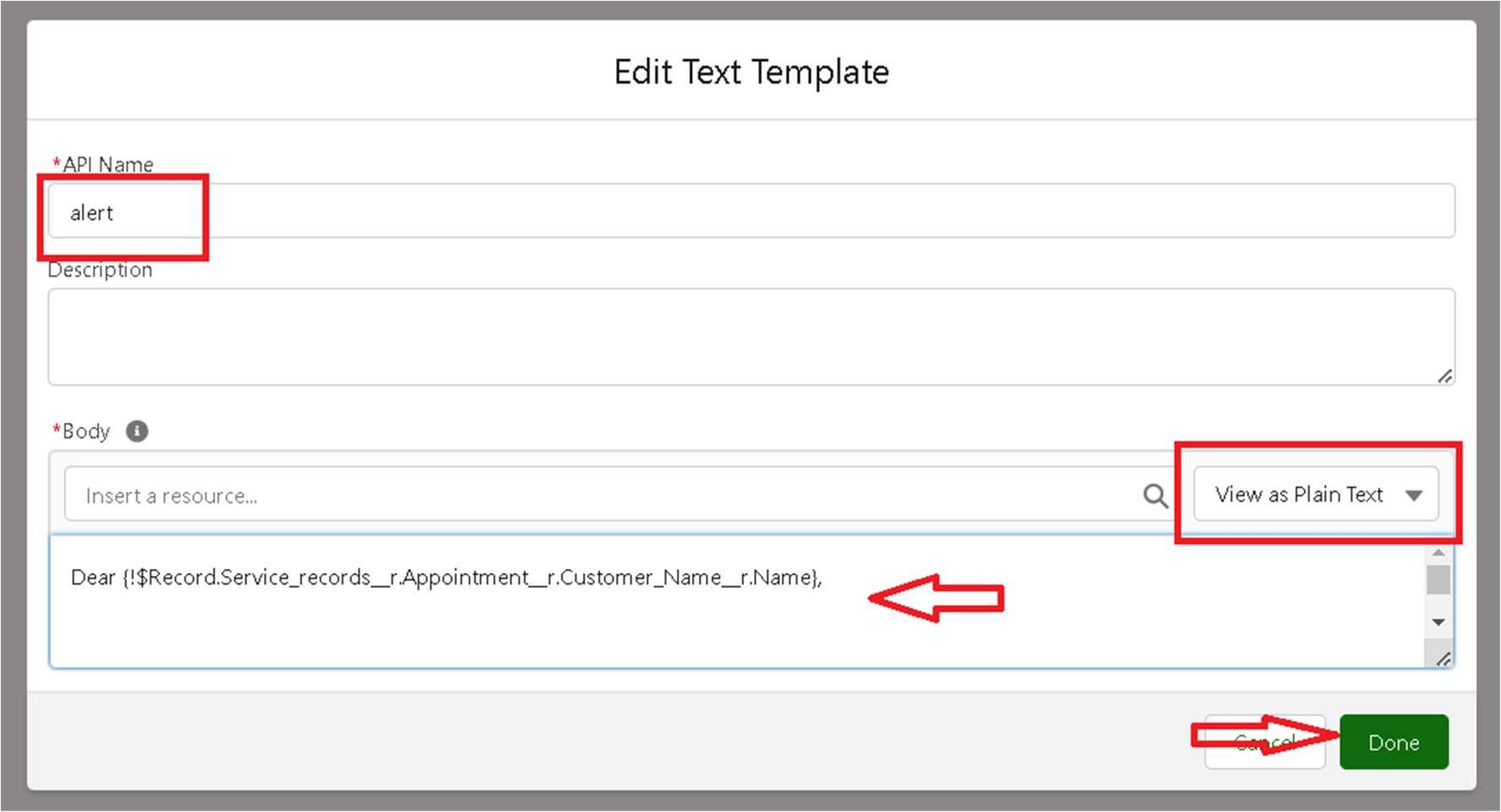
Record-Triggered Flow
Start
Run Immediately
Add Element
Search...
Collection Sort
Collection Filter
Data
Create Records
Update Records
Get Records
Delete Records

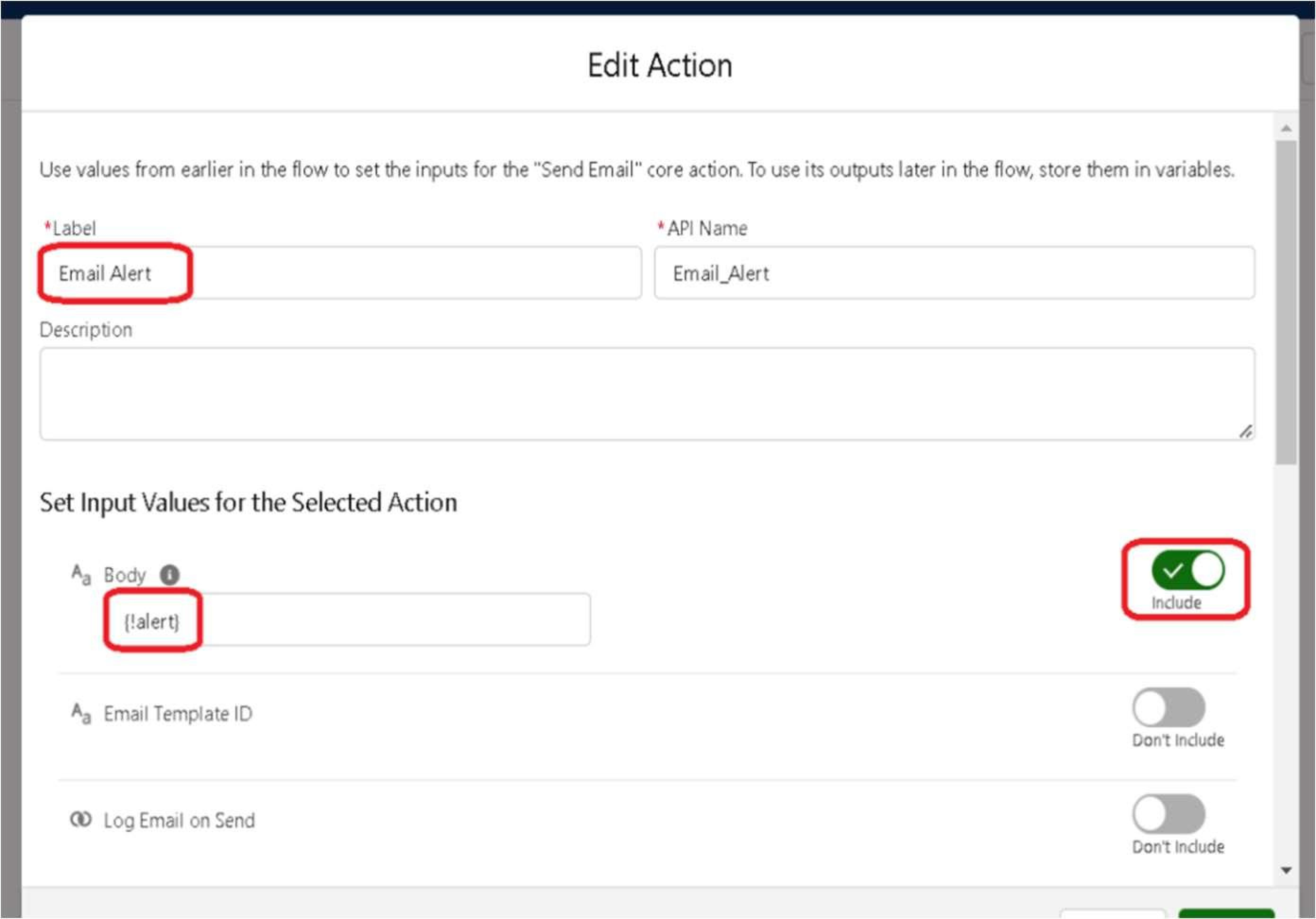


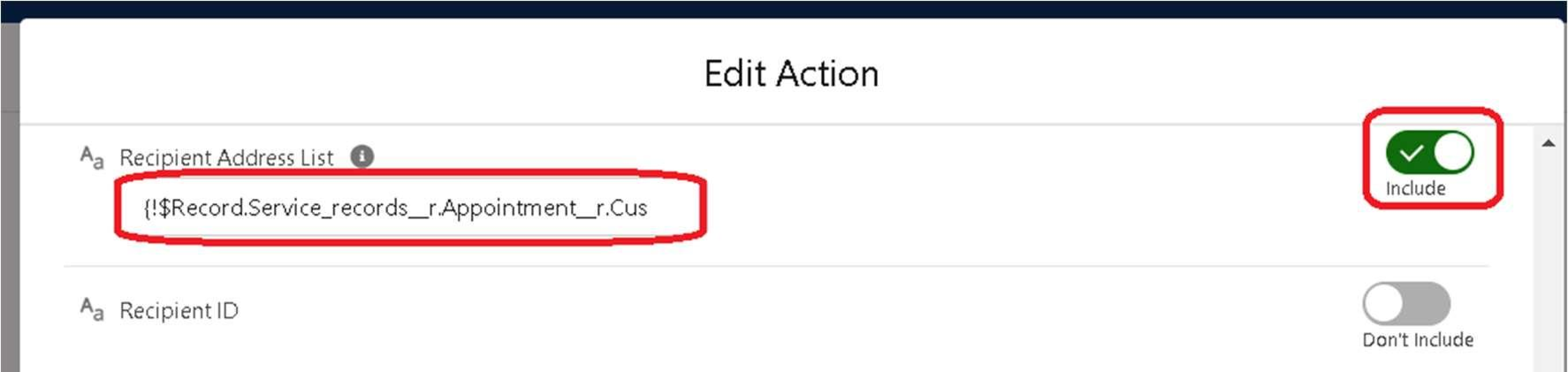
Edit Update Records
Update Salesforce records using values from the flow.
*Label
Amount Update
*API Name
Amount_Update
Description
*How to Find Records to Update and Set Their Values
Use the billing details and feedback record that triggered the flow
Update records related to the billing details and 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)
Cancel
Done


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 > Service A...
Add Field
Cancel
Done


Flow Builder
Billing Amount Flow - V1
Select Elements
Toolbox
Manager
Search this flow...
New Resource
RESOURCES


Edit Text Template
*API Name
alert
Description
*Body
Insert a resource...
View as Plain Text
Dear {!$Record.Service_records__r.Appointment__r.Customer_Name__r.Name},
Cancel
Done


Edit Action
Use values from earlier in the flow to set the inputs for the "Send Email" core action. To use its outputs later in the flow, store them in variables.
*Label
Email Alert
*API Name
Email_Alert
Description
Set Input Values for the Selected Action
Body
{!alert}
Include
Email Template ID
Don't Include
Log Email on Send
Don't Include


Edit Action
Recipient Address List
{!$Record.Service_records__r.Appointment__r.Cus
Include
Recipient ID
Don't Include

Related Record ID

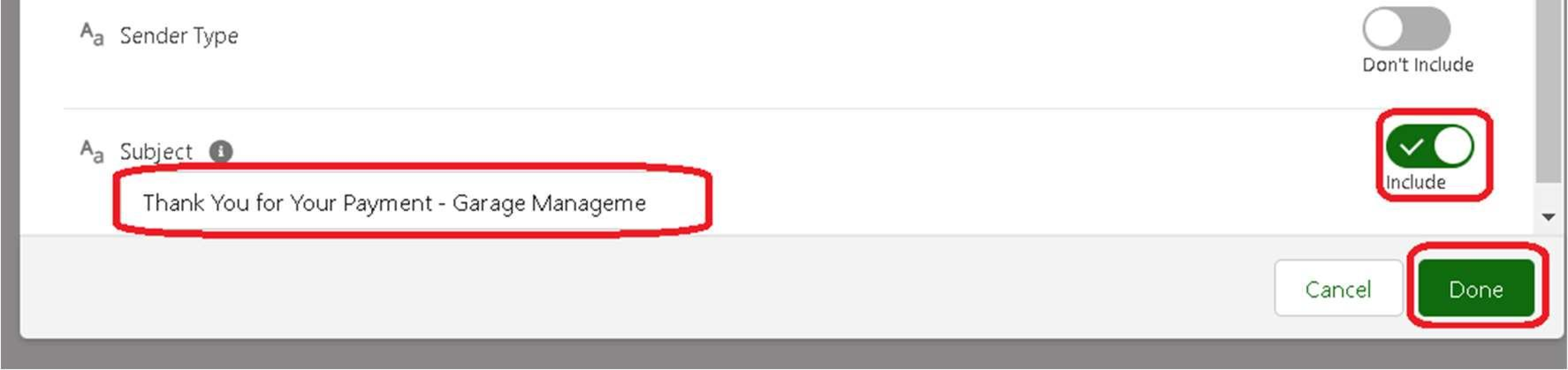
Don't Include

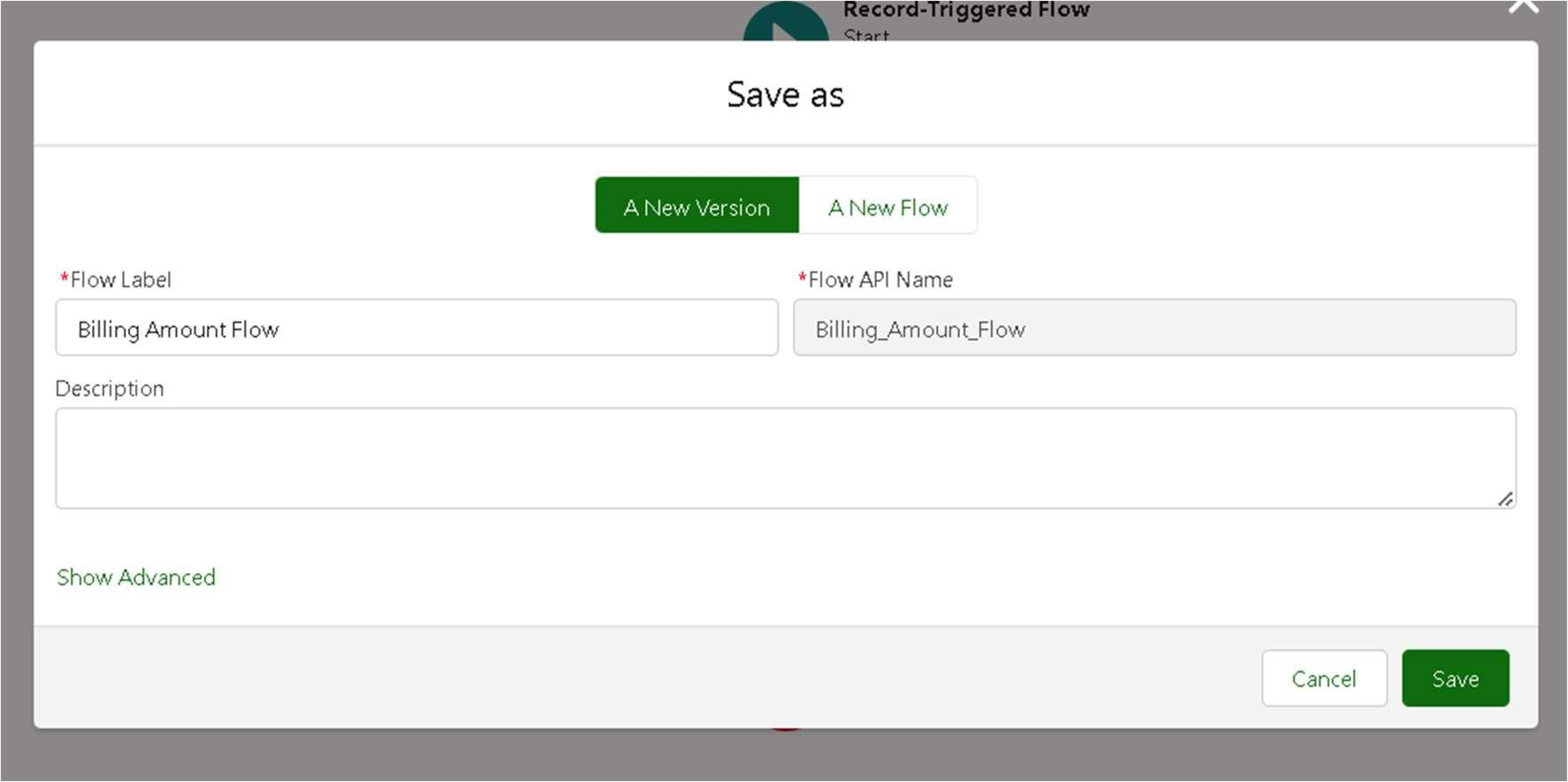
Rich-Text-Formatted Body

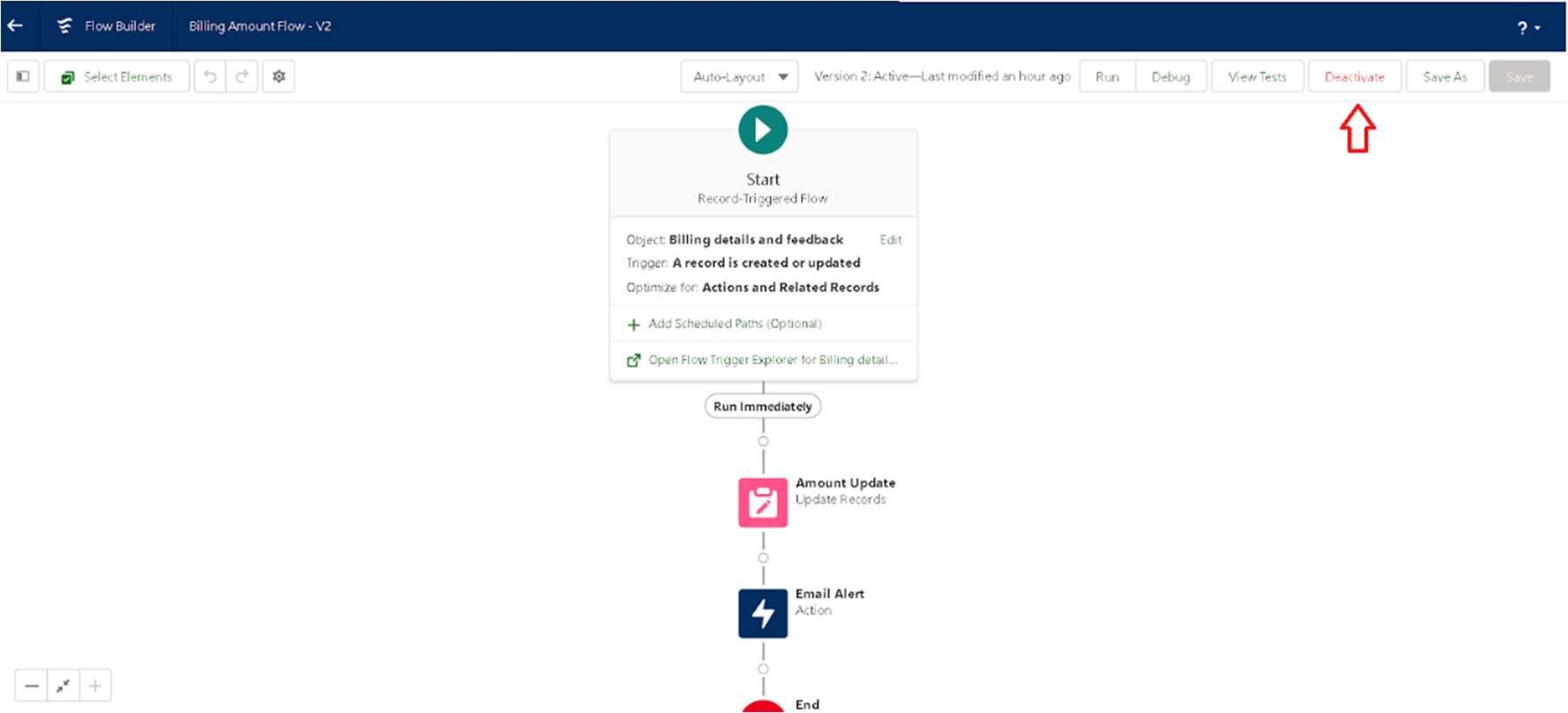
Don't Include

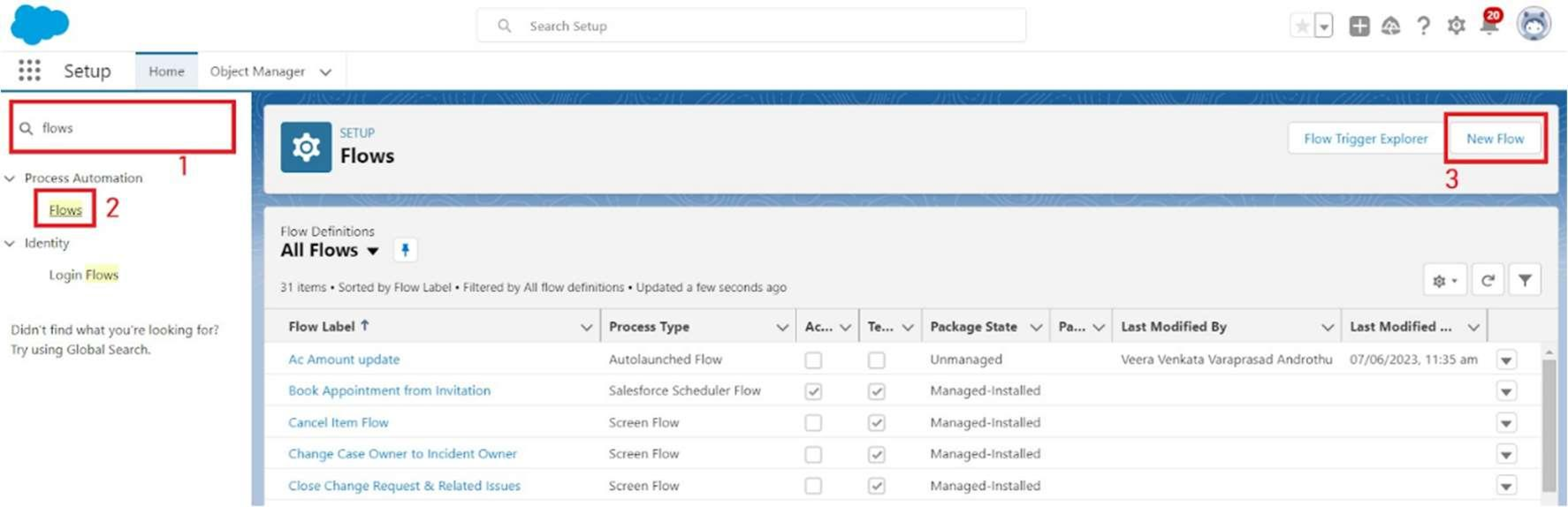
Sender Email Address

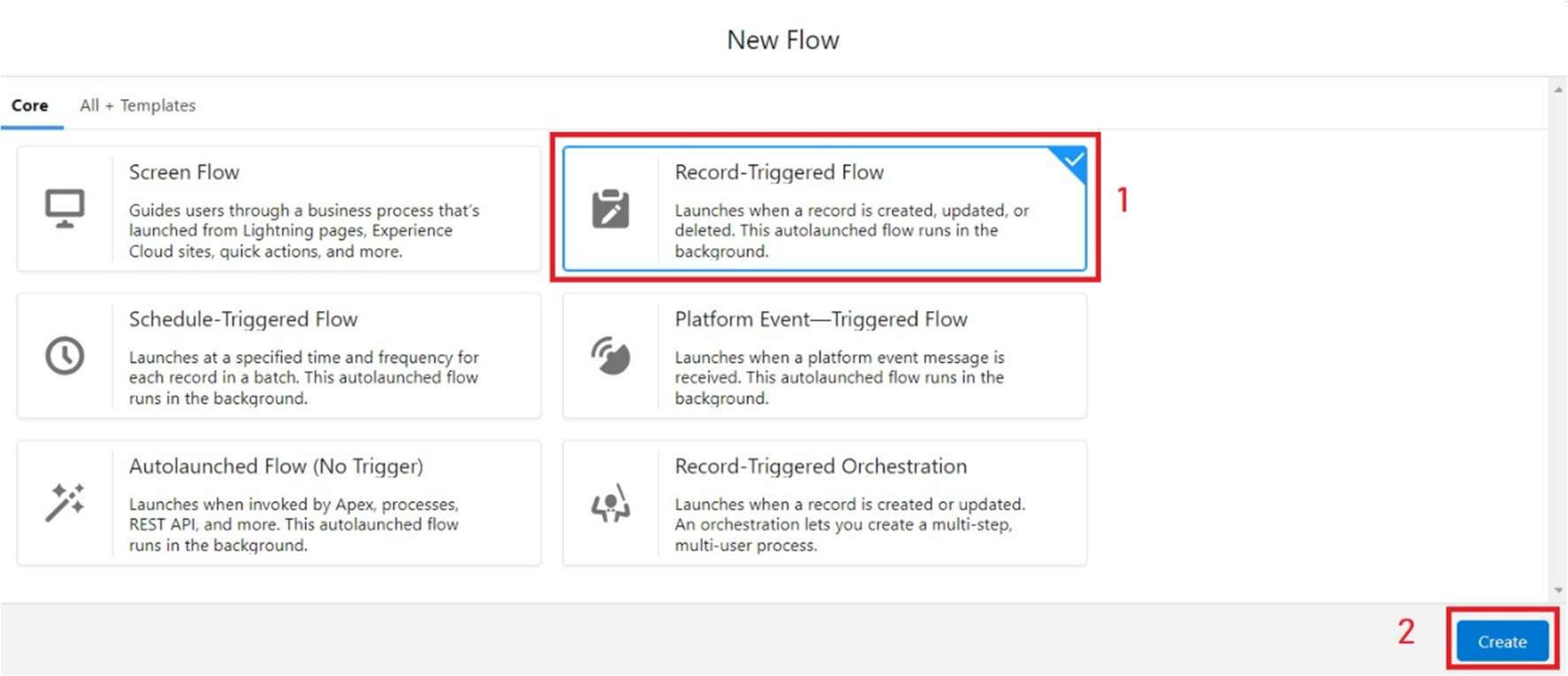
Don't Include


Sender Type
Don't Include
Subject
Thank You for Your Payment - Garage Manageme
Include
Cancel
Done


Record-Triggered Flow
Start
Save as
A New Version
A New Flow
*Flow Label
Billing Amount Flow
*Flow API Name
Billing_Amount_Flow
Description
Show Advanced
Cancel
Save


Flow Builder
Billing Amount Flow - V2
Select Elements
Auto-Layout
Version 2: Active—Last modified an hour ago
Run
Debug
View Tests
Deactivate
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 detail...
Run Immediately
Amount Update
Update Records
Email Alert
Action
End


Search Setup
Setup
Home
Object Manager
flows
1
Process Automation
Flows
2
Identity
Login Flows
Didn't find what you're looking for?
Try using Global Search.
SETUP
Flows
Flow Trigger Explorer
New Flow
3
Flow Definitions
All Flows
31 items • Sorted by Flow Label • Filtered by All flow definitions • Updated a few seconds ago
Flow Label
Process Type
Ac...
Te...
Package State
Pa...
Last Modified By
Last Modified ...
Ac Amount update
Autolaunched Flow
Unmanaged
Veera Venkata Varaprasad Androthu
07/06/2023, 11:35 am
Book Appointment from Invitation
Salesforce Scheduler Flow
Managed-Installed
Cancel Item Flow
Screen Flow
Managed-Installed
Change Case Owner to Incident Owner
Screen Flow
Managed-Installed
Close Change Request & Related Issues
Screen Flow
Managed-Installed


New Flow
Core
All + Templates
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.
1
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.
2
Create

Set Filter Conditions

Condition Requirements to Update Record

All Conditions Are Met (AND)

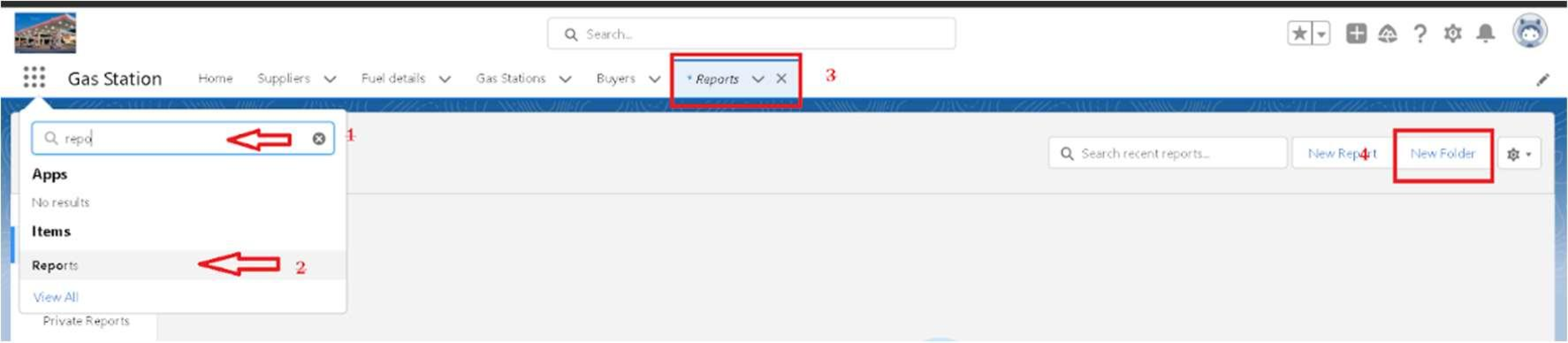
Field	Operator	Value
Quality_Check_Status__c	Equals	True

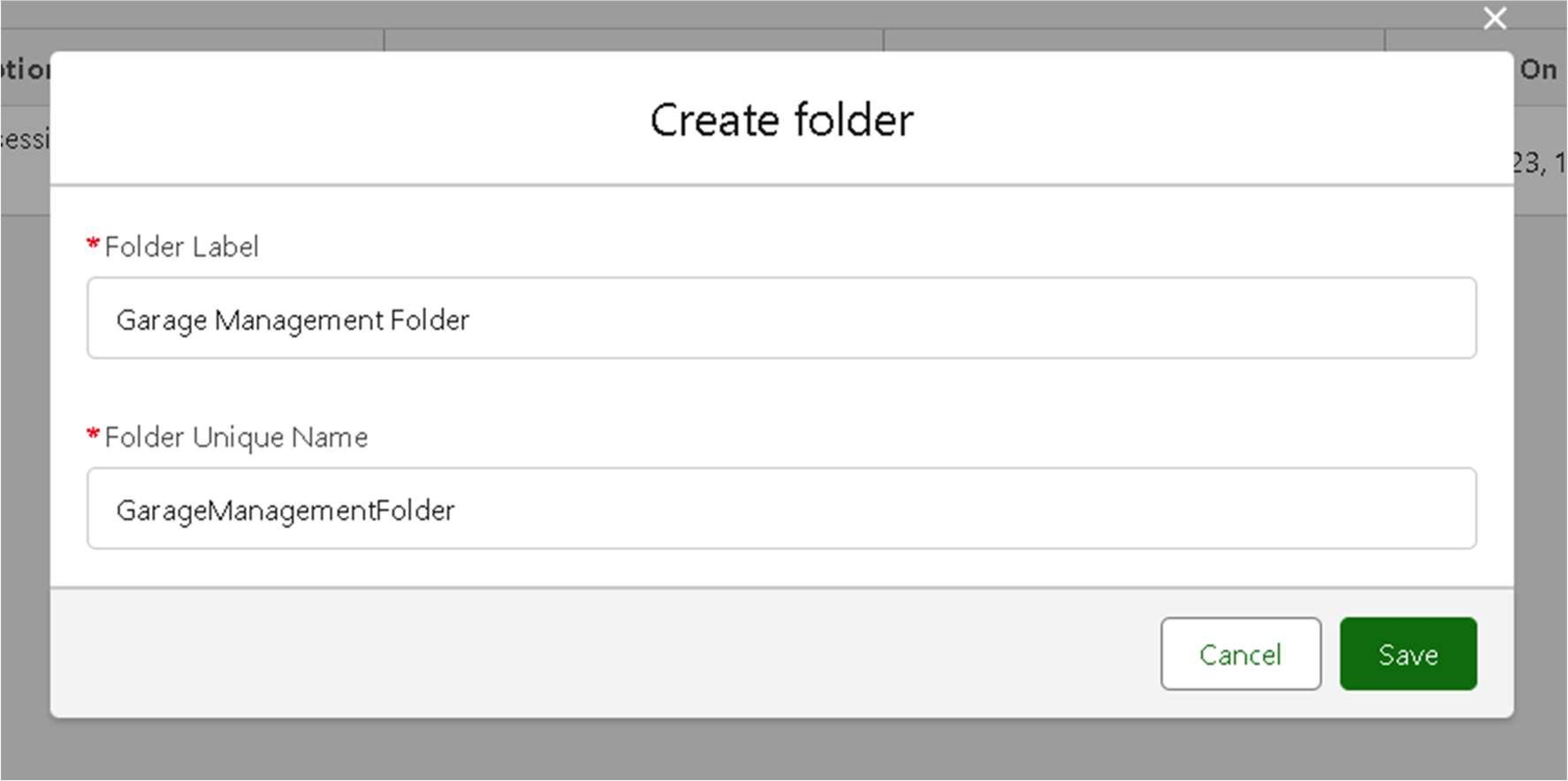
+ Add Condition

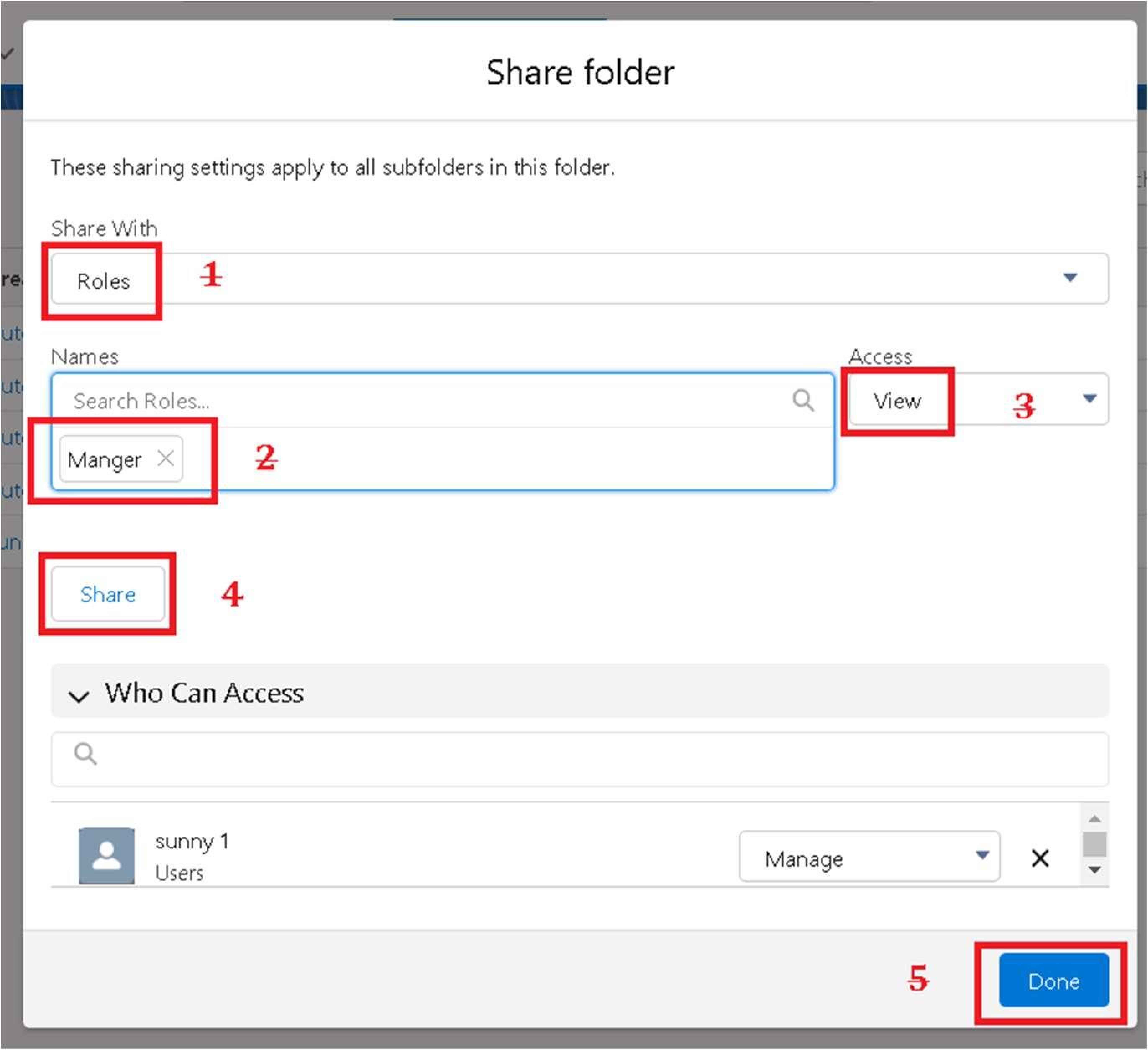
Set Field Values for the Service record Record

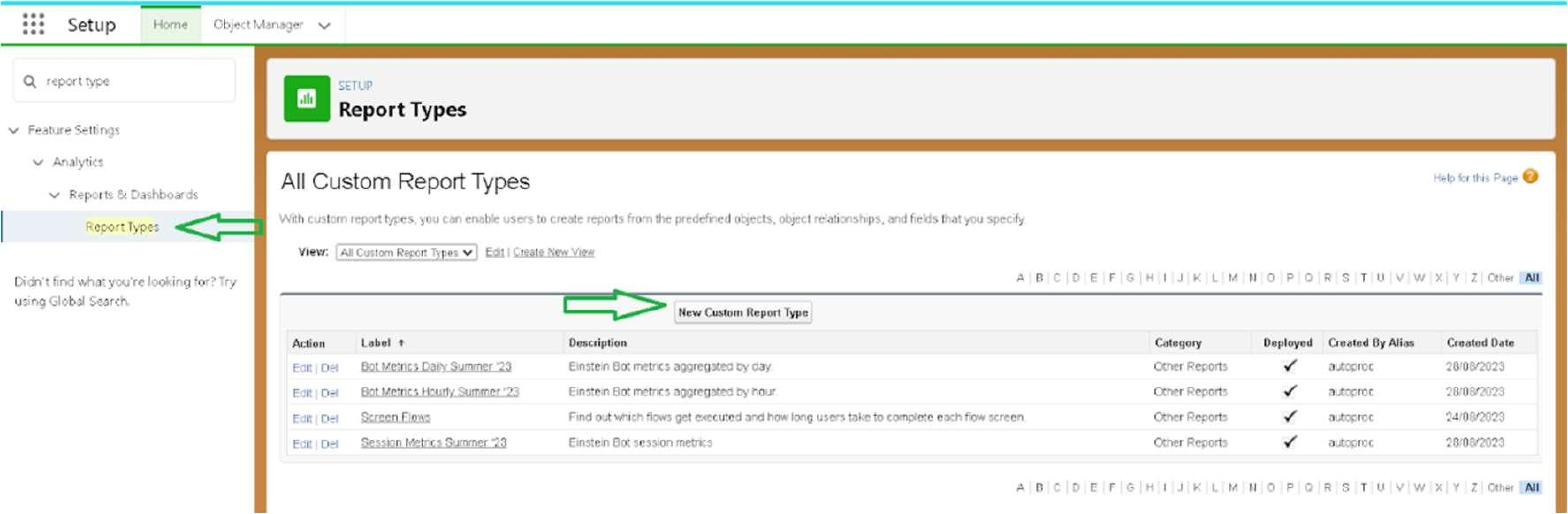
Field		Value
Service_Status__c	←	Completed

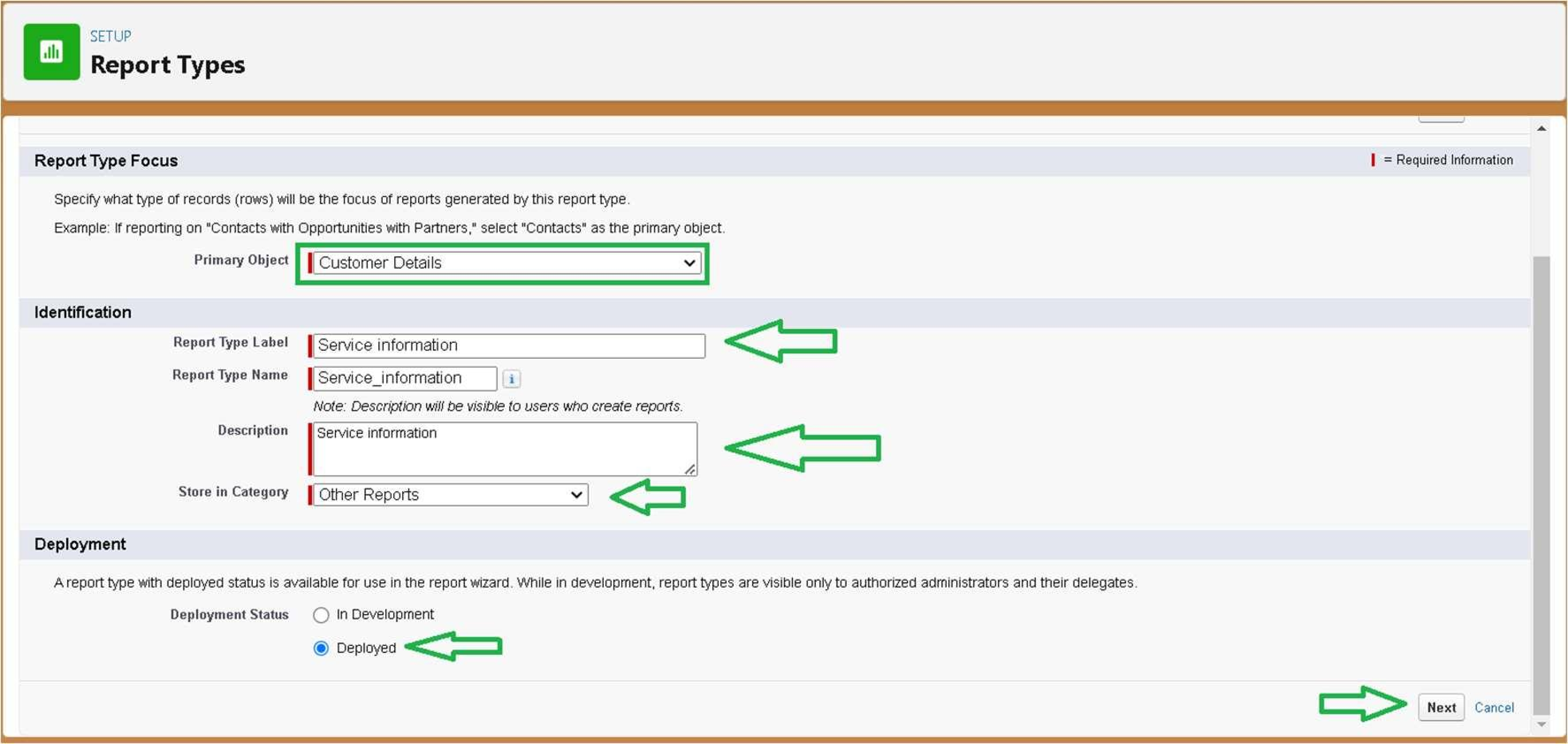
+ Add Field


Search...
Gas Station
Home
Suppliers
Fuel details
Gas Stations
Buyers
* Reports
3
repo
1
Apps
No results
Items
Reports
2
View All
Private Reports
Search recent reports...
New Report
4
New Folder

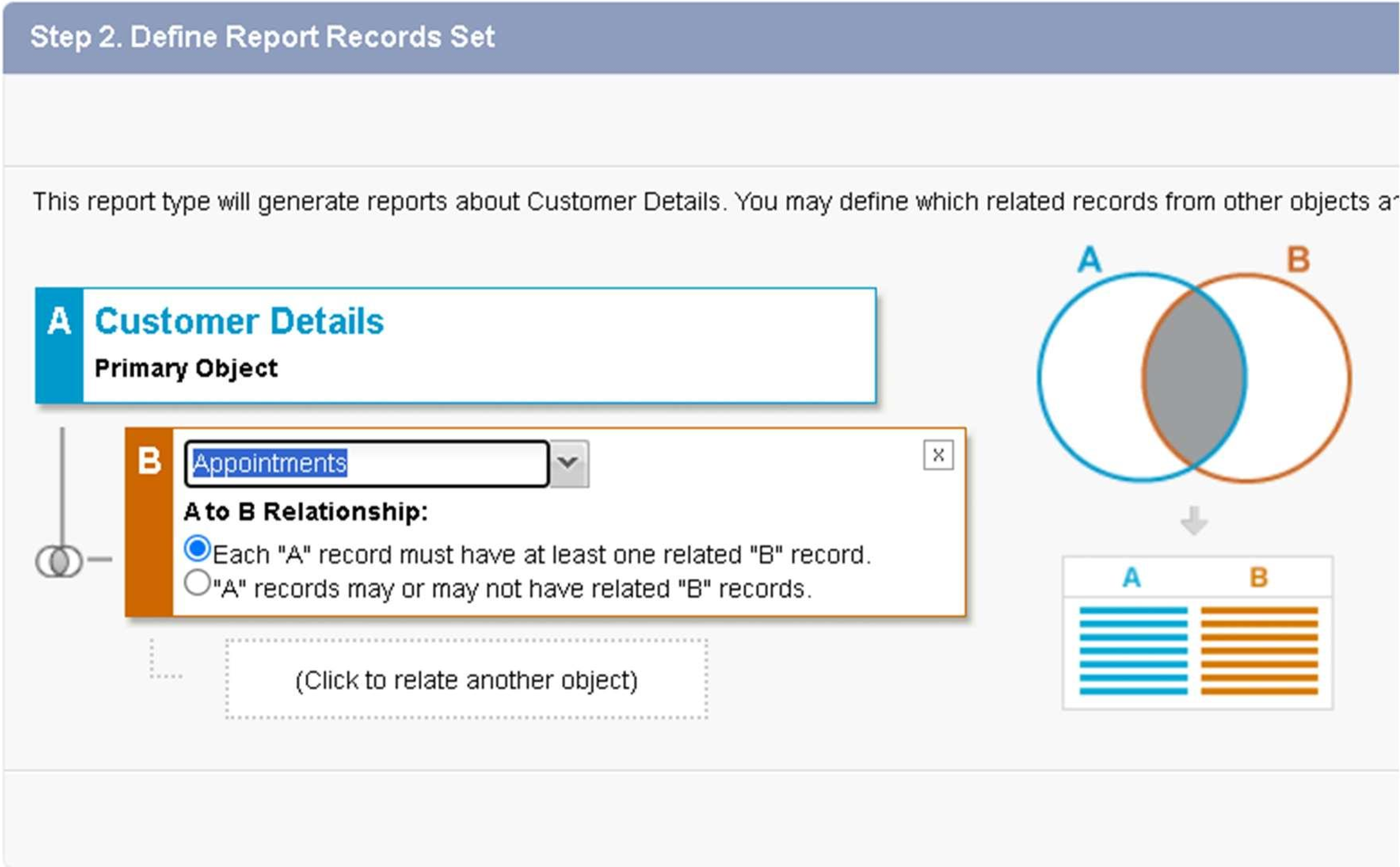

Create folder
* Folder Label
Garage Management Folder
* Folder Unique Name
GarageManagementFolder
Cancel
Save

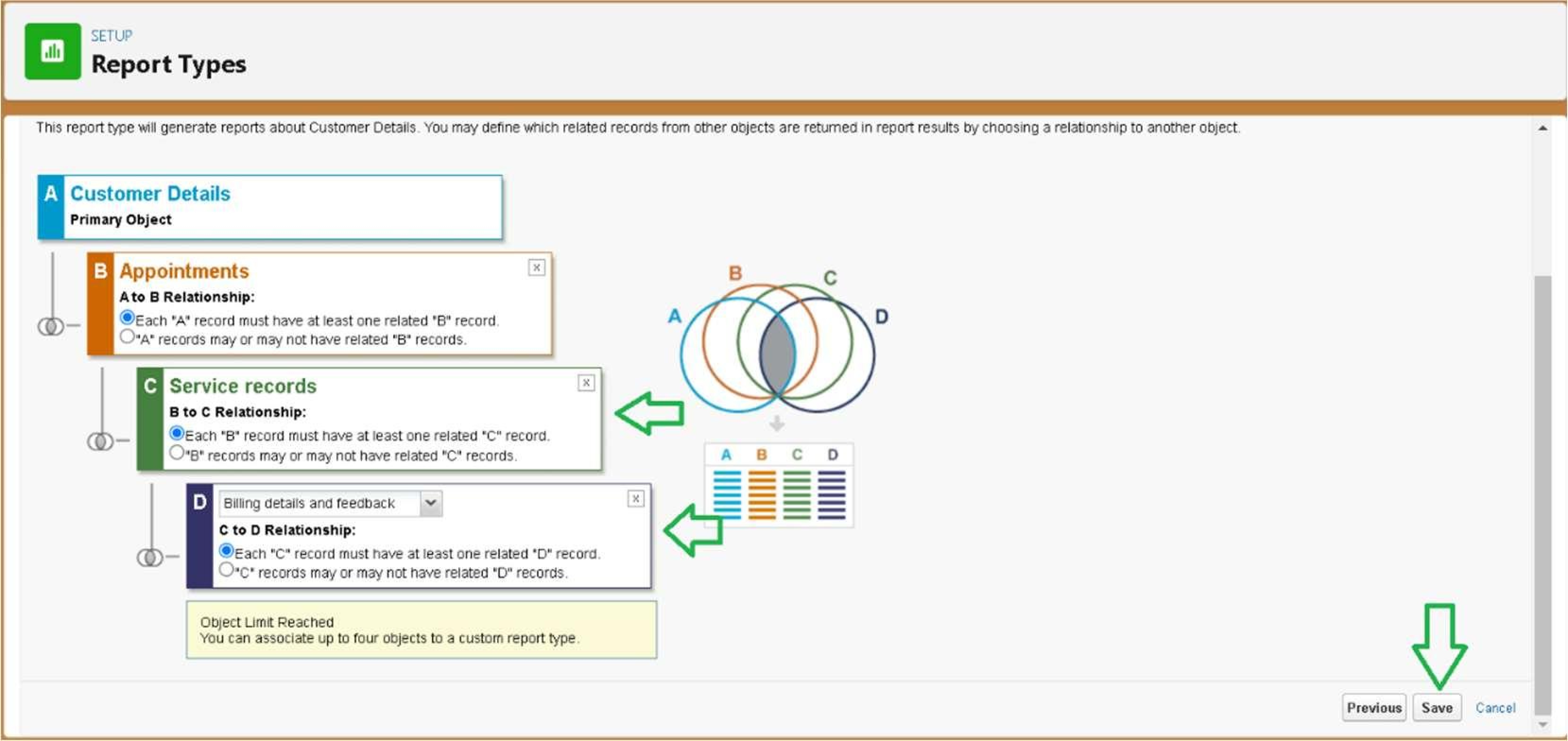

Share folder
These sharing settings apply to all subfolders in this folder.
Share With
Roles
1
Names
Search Roles...
Manger
2
Access
View
3
Share
4
Who Can Access
sunny 1
Users
Manage
5
Done

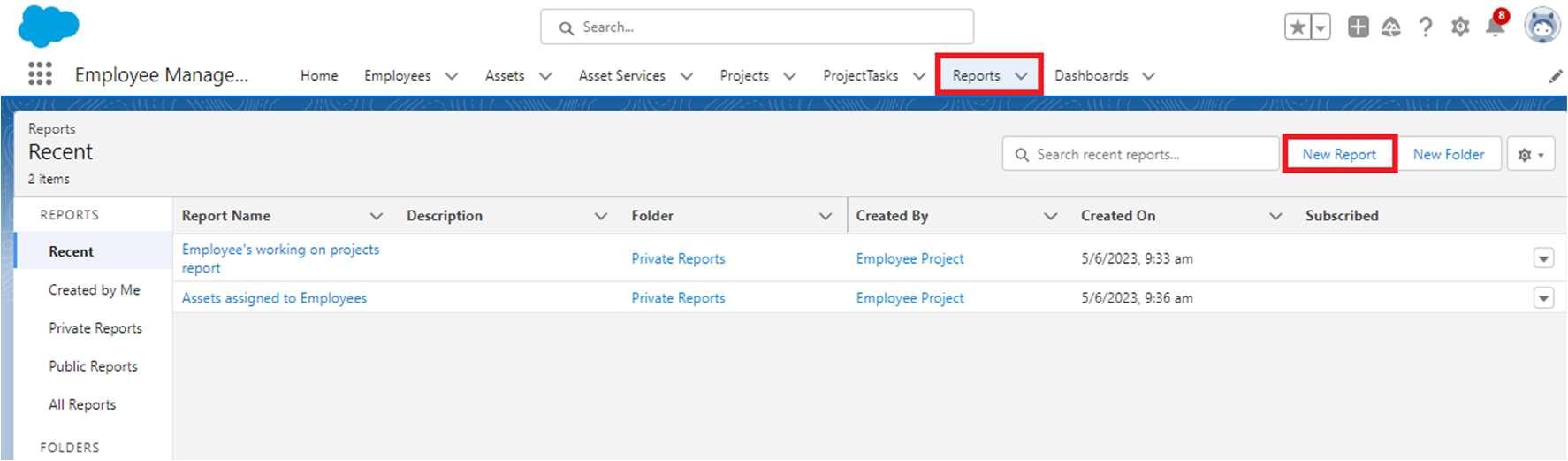

Setup
Home
Object Manager
report type
Feature Settings
Analytics
Reports & Dashboards
Report Types
Didn't find what you're looking for? Try using Global Search.
SETUP
Report Types
All Custom Report Types
Help for this Page
With custom report types, you can enable users to create reports from the predefined objects, object relationships, and fields that you specify.
View: All Custom Report Types Edit | Create New View
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
New Custom Report Type
Action | Label ↑ | Description | Category | Deployed | Created By Alias | Created Date
Edit | Del | Bot Metrics Daily Summer '23 | Einstein Bot metrics aggregated by day. | Other Reports | ✓ | autoproc | 28/08/2023
Edit | Del | Bot Metrics Hourly Summer '23 | Einstein Bot metrics aggregated by hour. | Other Reports | ✓ | autoproc | 28/08/2023
Edit | Del | Screen Flows | Find out which flows get executed and how long users take to complete each flow screen. | Other Reports | ✓ | autoproc | 24/08/2023
Edit | Del | Session Metrics Summer '23 | Einstein Bot session metrics | Other Reports | ✓ | autoproc | 28/08/2023
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

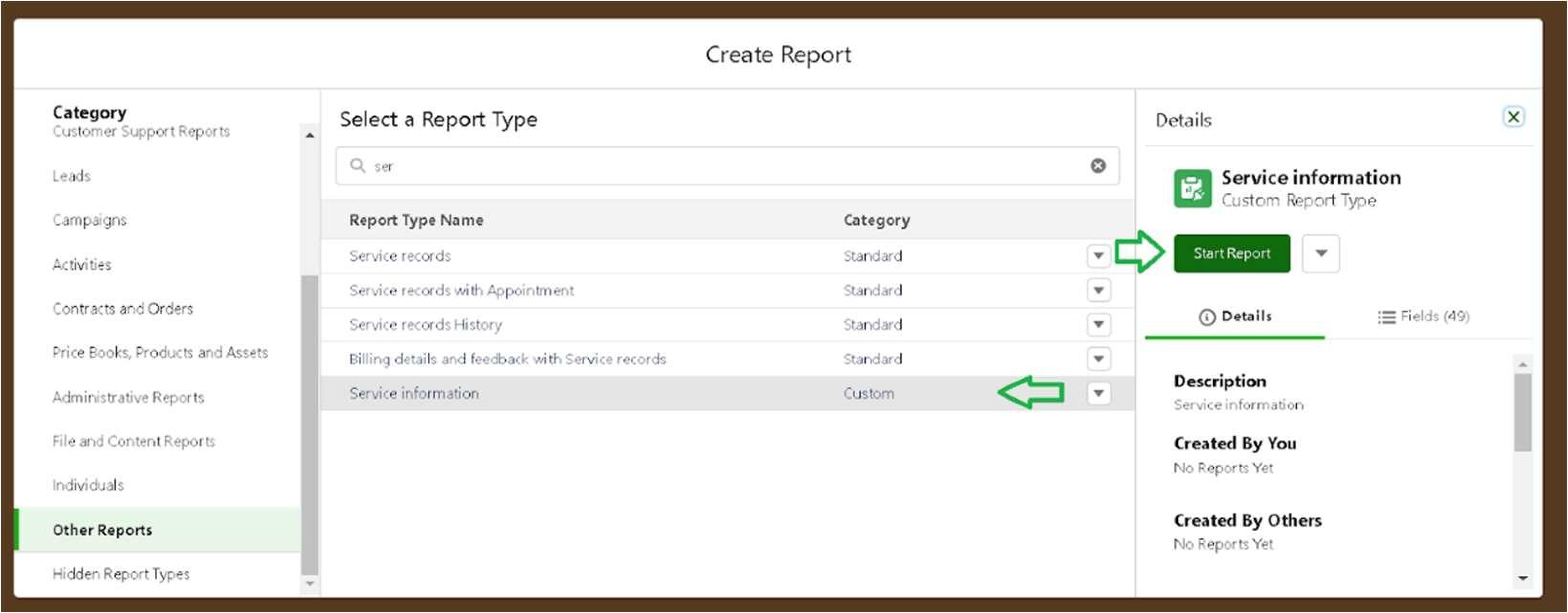

SETUP
Report Types
Report Type Focus
= Required Information
Specify what type of records (rows) will be the focus of reports generated by this report type.
Example: If reporting on "Contacts with Opportunities with Partners," select "Contacts" as the primary object.
Primary Object
Customer Details
Identification
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

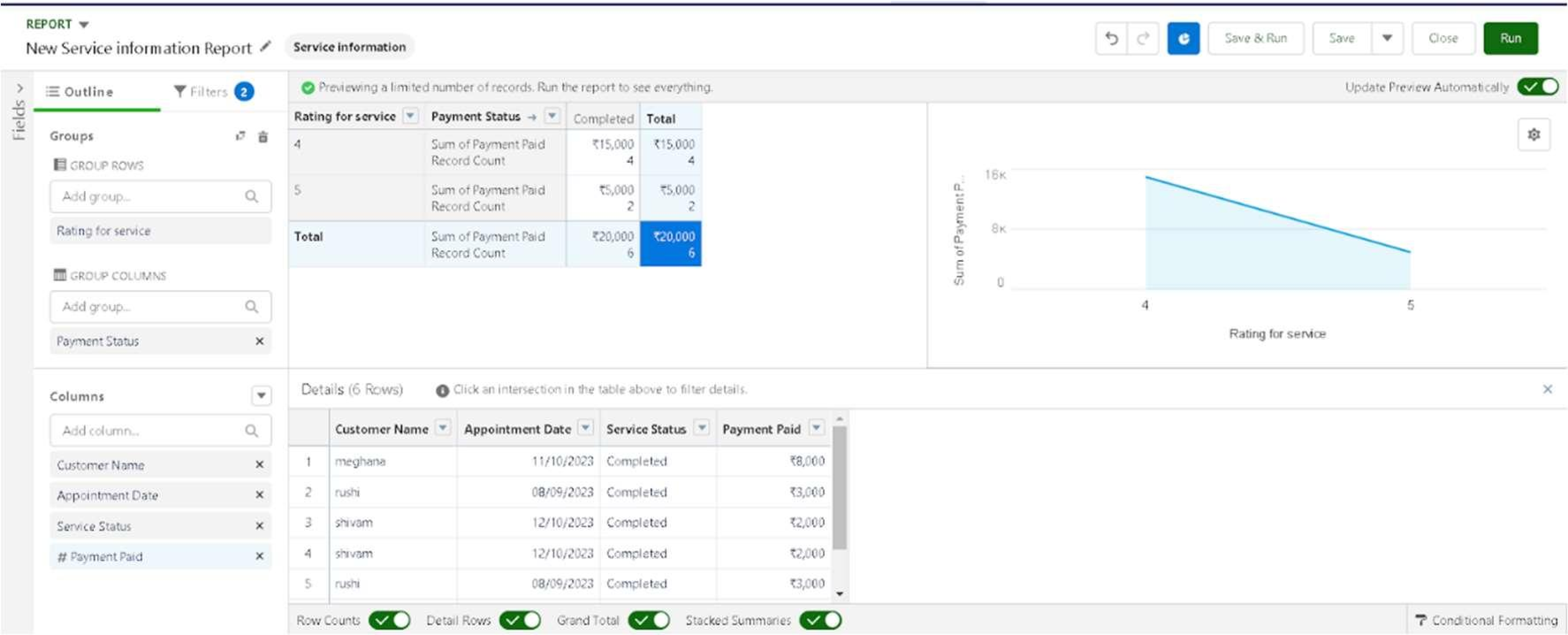

New Custom Report Type
Service information
Help for this Page
Step 2. Define Report Records Set
Step 2 of 2
Previous
Save
Cancel
This report type will generate reports about Customer Details. You may define which related records from other objects are returned in report results by choosing a relationship to another object.
A
Customer Details
Primary Object
B
--Select Object--
--Select Object--
Activities
Appointments
Duplicate Record Items
st one related "B" record.
related "B" records.
A
B
A
B
Previous
Save
Cancel

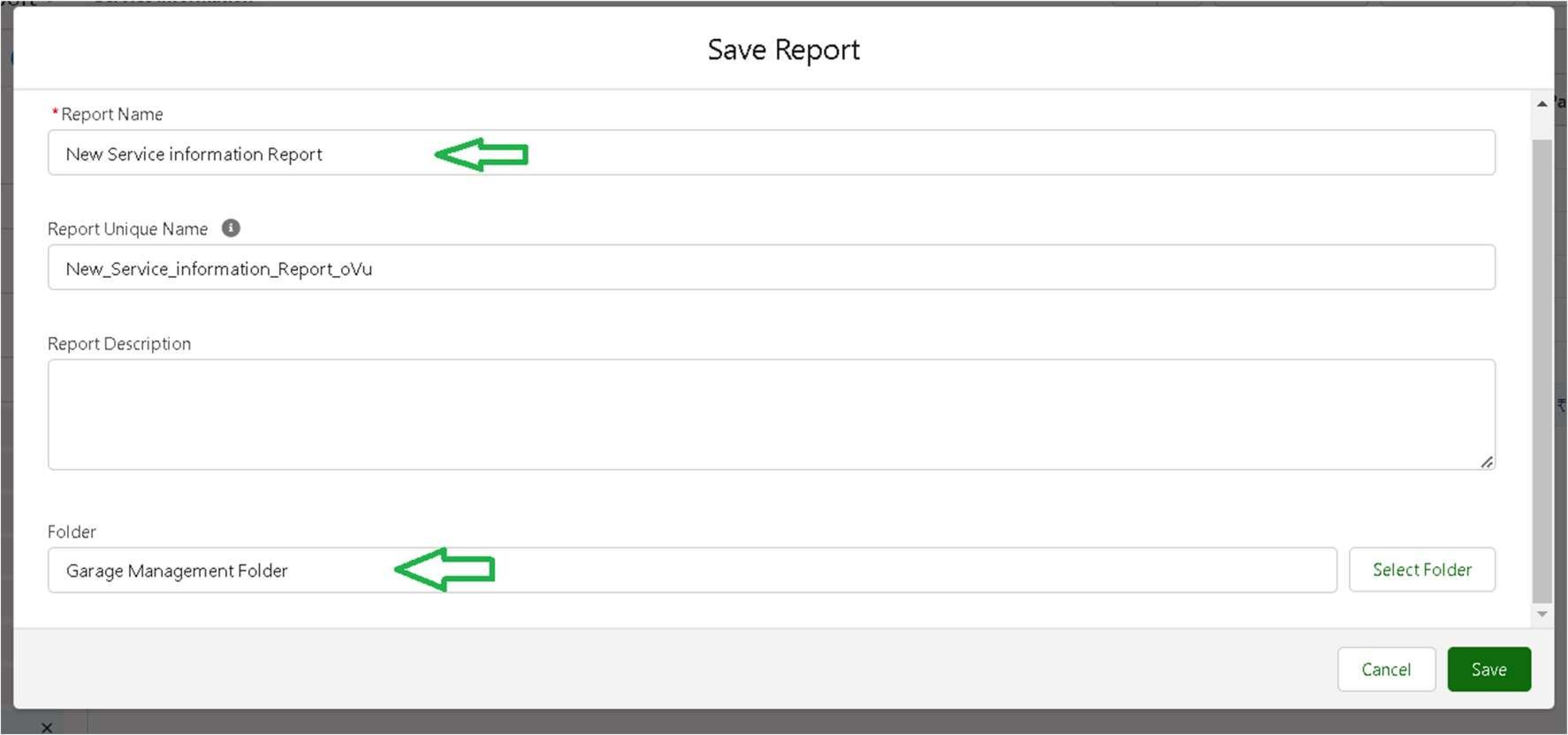

Step 2. Define Report Records Set
This report type will generate reports about Customer Details. You may define which related records from other objects a
A
Customer Details
Primary Object
B
Appointments
A to B Relationship:
Each "A" record must have at least one related "B" record.
"A" records may or may not have related "B" records.
(Click to relate another object)
A
B
A
B

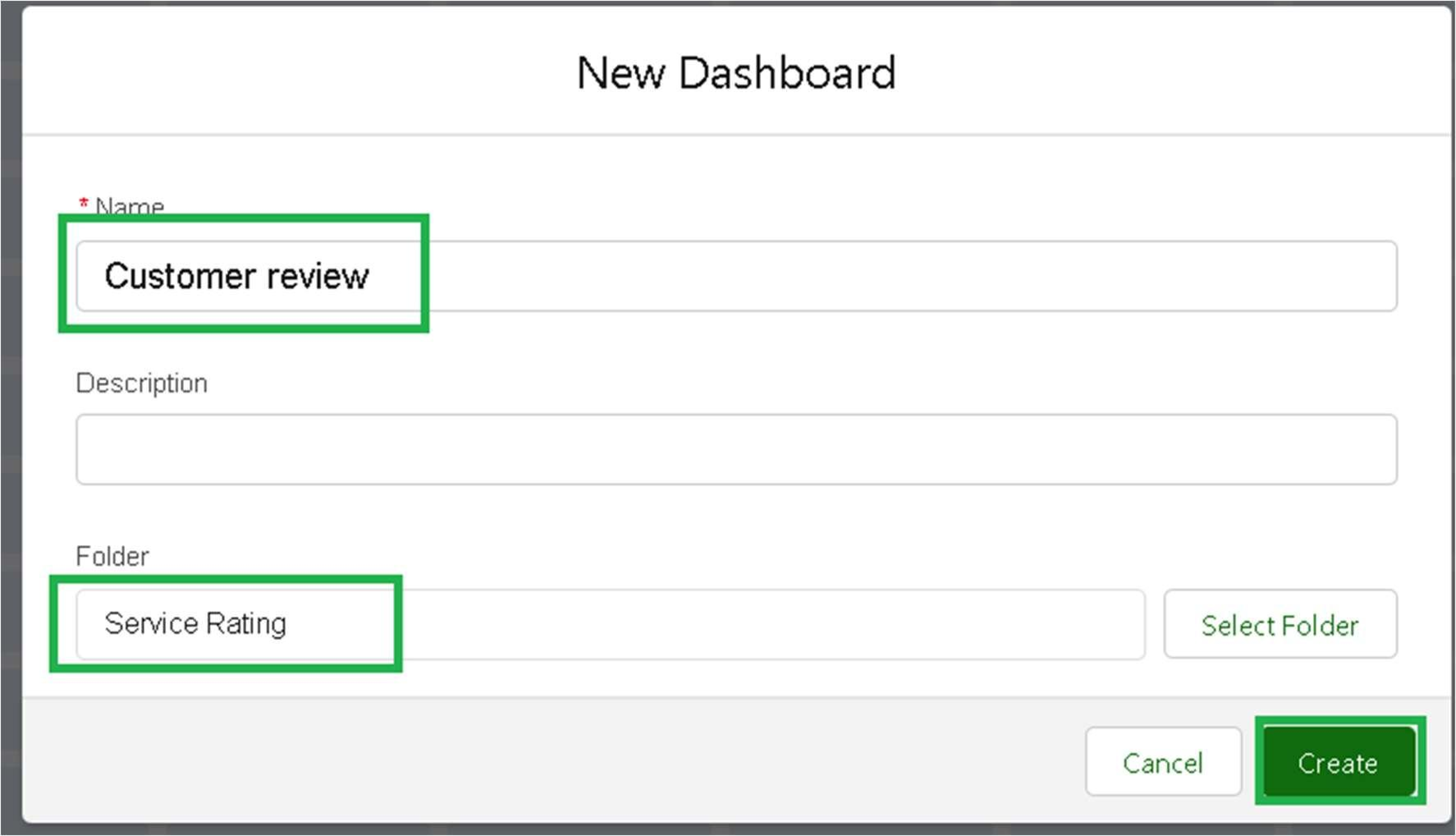

SETUP
Report Types
This report type will generate reports about Customer Details. You may define which related records from other objects are returned in report results by choosing a relationship to another object.
A Customer Details
Primary Object
B Appointments
A to B Relationship:
Each "A" record 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.
Object Limit Reached
You can associate up to four objects to a custom report type.
A B C D
A B C D
Previous
Save
Cancel

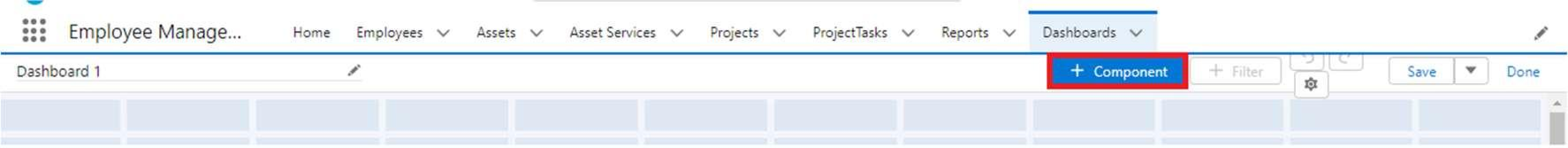

Search...
Employee Manage...
Home
Employees
Assets
Asset Services
Projects
ProjectTasks
Reports
Dashboards
Reports
Recent
2 items
Search recent reports...
New Report
New Folder
REPORTS
Recent
Created by Me
Private Reports
Public Reports
All Reports
FOLDERS
Report Name
Description
Folder
Created By
Created On
Subscribed
Employee's working on projects report
Private Reports
Employee Project
5/6/2023, 9:33 am
Assets assigned to Employees
Private Reports
Employee Project
5/6/2023, 9:36 am

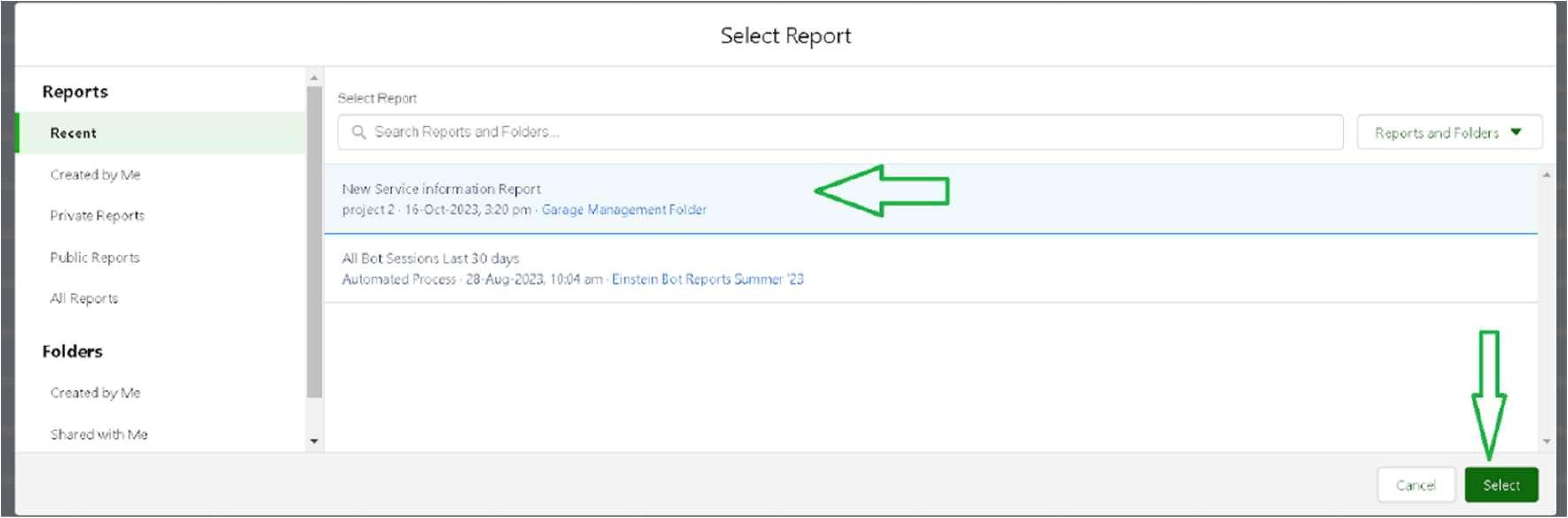

Create Report
Category
Customer Support Reports
Leads
Campaigns
Activities
Contracts and Orders
Price Books, Products and Assets
Administrative Reports
File and Content Reports
Individuals
Other Reports
Hidden Report Types
Select a Report Type
ser
Report Type Name
Category
Service records
Standard
Service records with Appointment
Standard
Service records History
Standard
Billing details and feedback with Service records
Standard
Service information
Custom
Details
Service information
Custom Report Type
Start Report
Details
Fields (49)
Description
Service information
Created By You
No Reports Yet
Created By Others
No Reports Yet

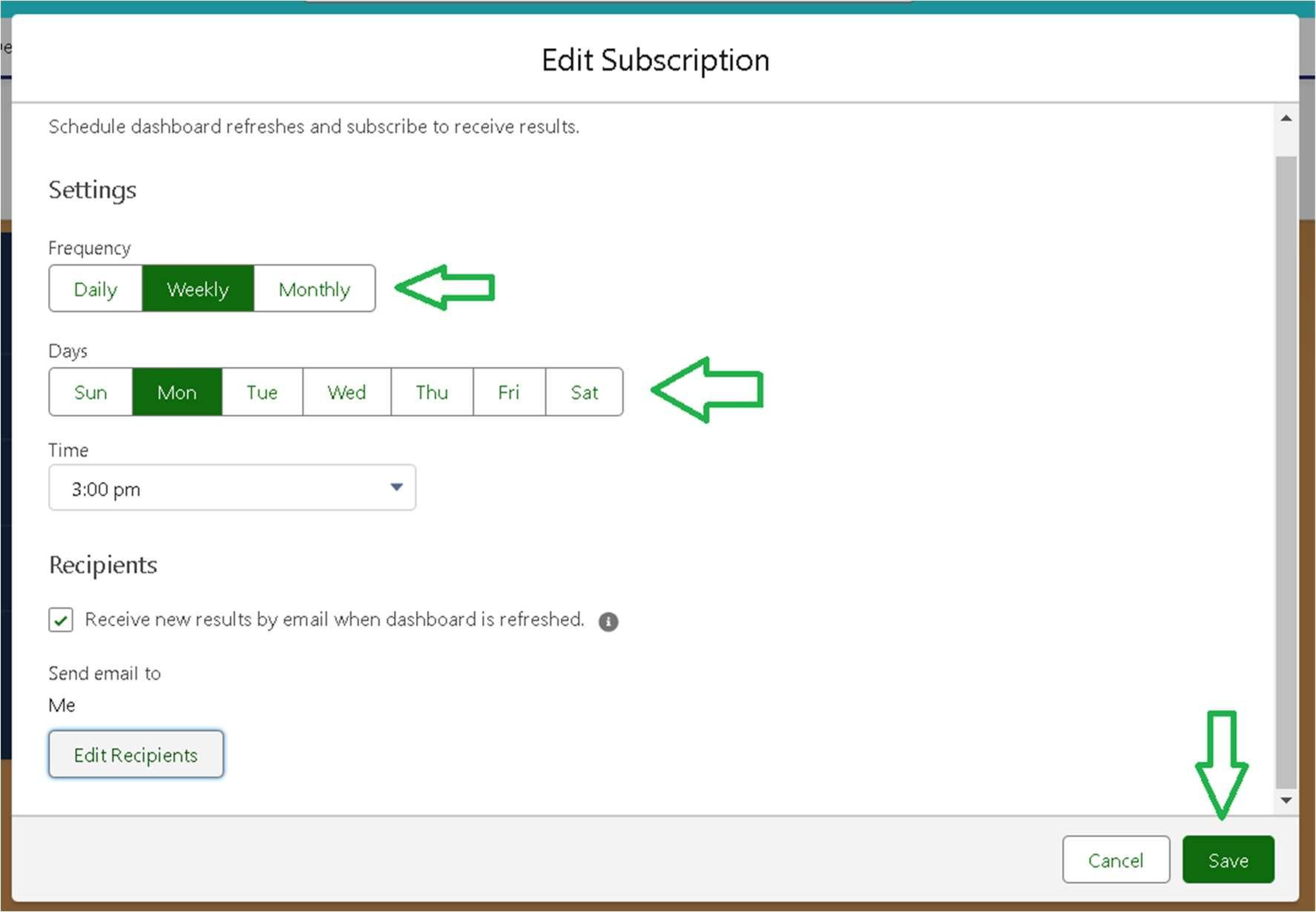

REPORT
New Service information Report
Service information
Save & Run
Save
Close
Run
Outline
Filters 2
Fields
Groups
GROUP ROWS
Add group...
Rating for service
GROUP COLUMNS
Add group...
Payment Status
Columns
Add column...
Customer Name
Appointment Date
Service Status
Payment Paid
Previewing a limited number of records. Run the report to see everything.
Update Preview Automatically
Rating for service
Payment Status
Completed
Total
4
Sum of Payment Paid
Record Count
₹15,000
4
₹15,000
4
5
Sum of Payment Paid
Record Count
₹5,000
2
₹5,000
2
Total
Sum of Payment Paid
Record Count
₹20,000
6
₹20,000
6
16K
8K
0
Sum of Payment P...
4
5
Rating for service
Details (6 Rows)
Click an intersection in the table above to filter details.
Customer Name
Appointment Date
Service Status
Payment Paid
1 meghana 11/10/2023 Completed ₹8,000
2 rushi 08/09/2023 Completed ₹3,000
3 shivam 12/10/2023 Completed ₹2,000
4 shivam 12/10/2023 Completed ₹2,000
5 rushi 08/09/2023 Completed ₹3,000
Row Counts
Detail Rows
Grand Total
Stacked Summaries
Conditional Formatting


Save Report
* Report Name
New Service information Report
Report Unique Name
New_Service_information_Report_oVu
Report Description
Folder
Garage Management Folder
Select Folder
Cancel
Save


New Dashboard
* Name
Customer review
Description
Folder
Service Rating
Select Folder
Cancel
Create


Employee Manage...
Home
Employees
Assets
Asset Services
Projects
ProjectTasks
Reports
Dashboards
Dashboard 1
+ Component
+ Filter
Save
Done


Select Report
Reports
Recent
Created by Me
Private Reports
Public Reports
All Reports
Folders
Created by Me
Shared with Me
Select Report
Search Reports and Folders...
Reports and Folders
New Service information Report
project 2 · 16-Oct-2023, 3:20 pm · Garage Management Folder
All Bot Sessions Last 30 days
Automated Process · 28-Aug-2023, 10:04 am · Einstein Bot Reports Summer '23
Cancel
Select


Edit Subscription
Schedule dashboard refreshes and subscribe to receive results.
Settings
Frequency
Daily
Weekly
Monthly
Days
Sun
Mon
Tue
Wed
Thu
Fri
Sat
Time
3:00 pm
Recipients
Receive new results by email when dashboard is refreshed.
Send email to
Me
Edit Recipients
Cancel
Save

AmountDistribution.apxt | AmountDistributionHandler.apxc *

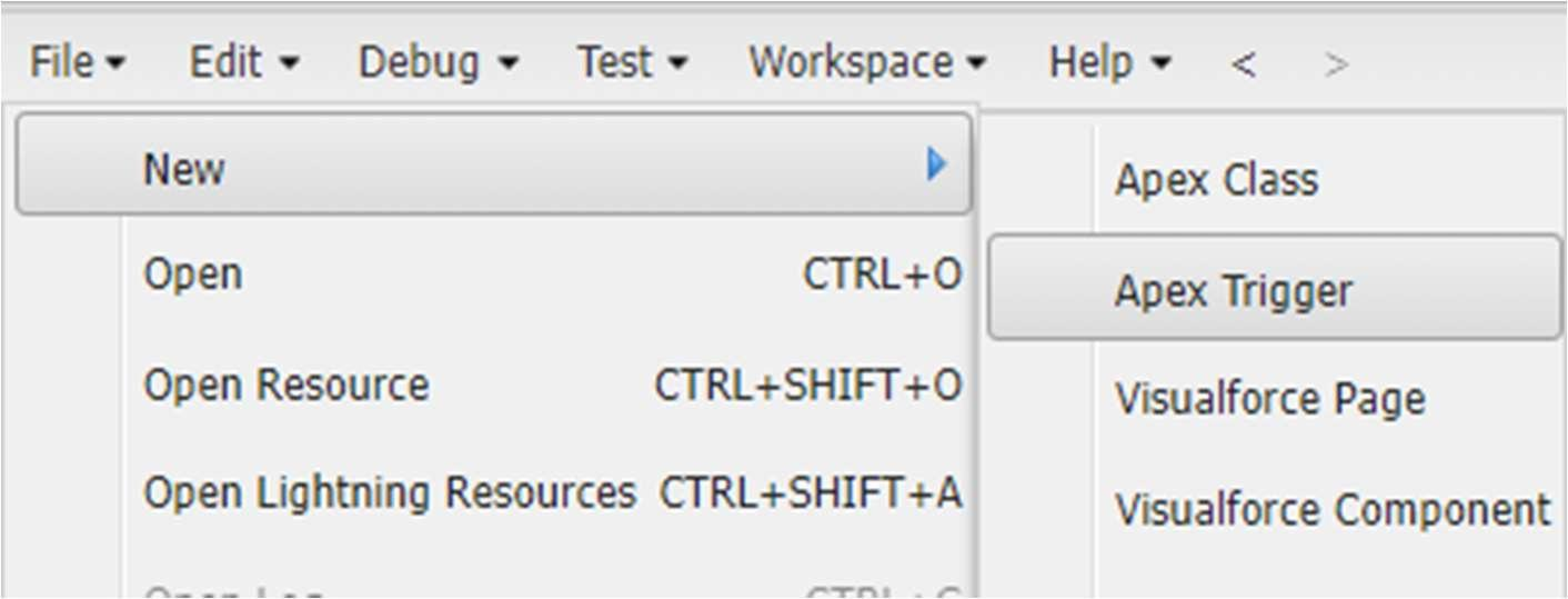
Code Coverage: None | API Version: 58 | Go To

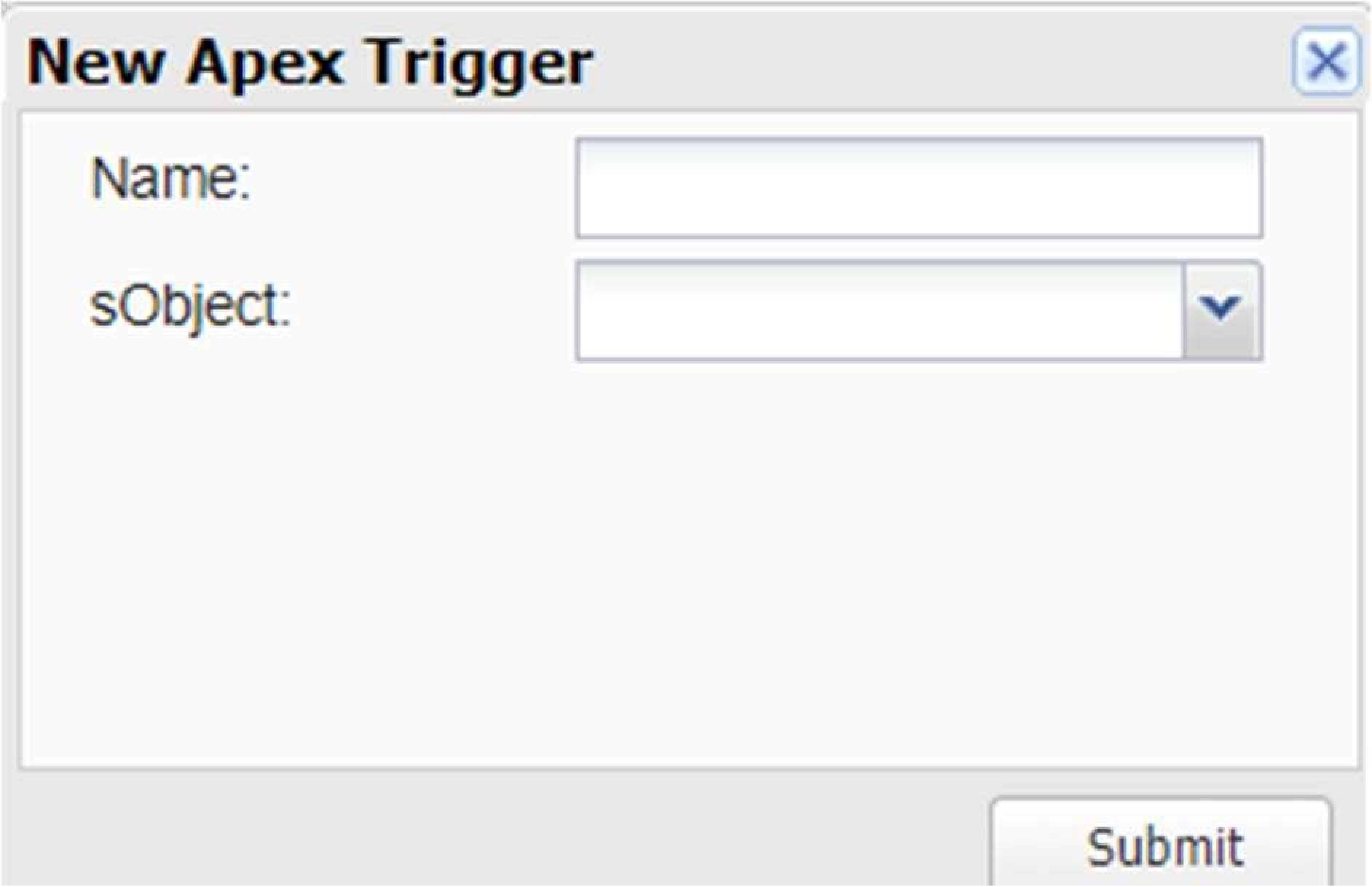
```
public class AmountDistributionHandler {

    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;
            }
            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;
```

AmountDistribution.apxt | AmountDistributionHandler.apxc *

Code Coverage: None | API Version: 58

```
            }
            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){
                app.Service_Amount__c = 3000;
            }
            else if(app.Replacement_Parts__c == true){
                app.Service_Amount__c = 5000;
            }

    }
    }
}
```


File
Edit
Debug
Test
Workspace
Help
New
Open CTRL+O
Open Resource CTRL+SHIFT+O
Open Lightning Resources CTRL+SHIFT+A
Apex Class
Apex Trigger
Visualforce Page
Visualforce Component


New Apex Trigger
Name:
sObject:
Submit

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

AmountDistribution.apxt | AmountDistributionHandler.apxc *

Code Coverage: None ▾ API Version: 58

```
trigger AmountDistribution on Appointment__c (before insert, before update) {

    if(trigger.isbefore && trigger.isinsert || trigger.isupdate){
        AmountDistributionHandler.amountDist(trigger.new);

    }

}
```