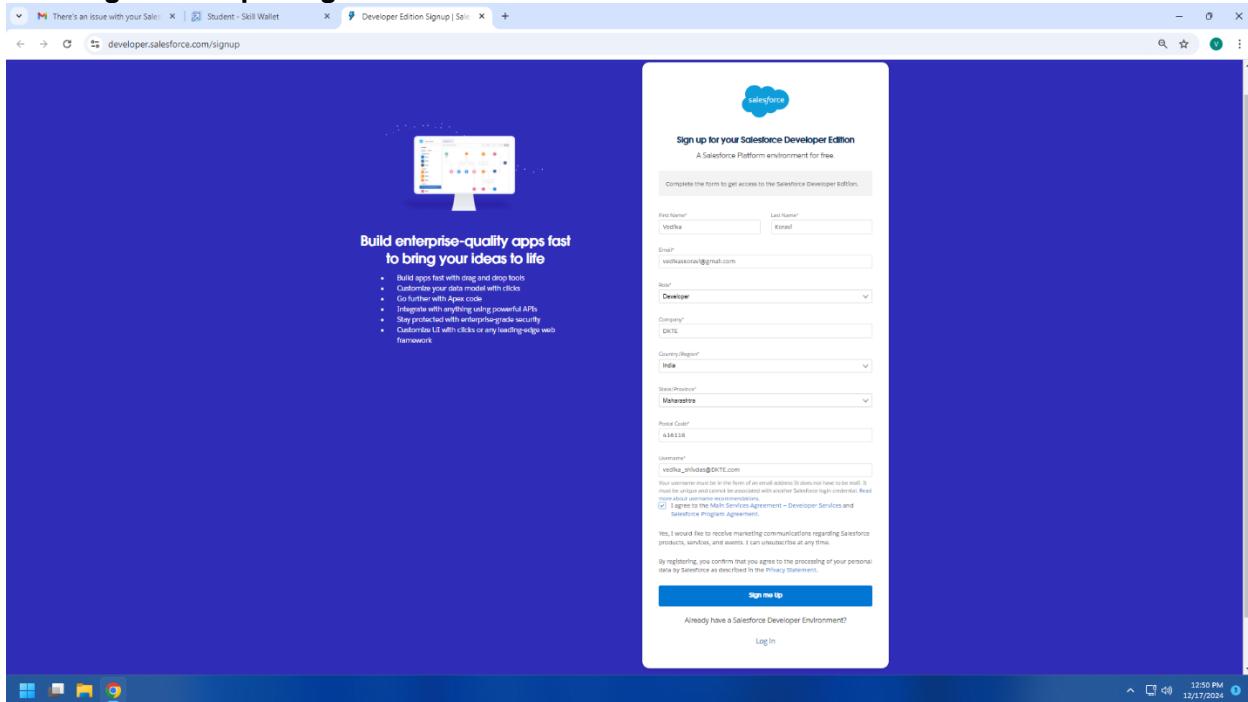


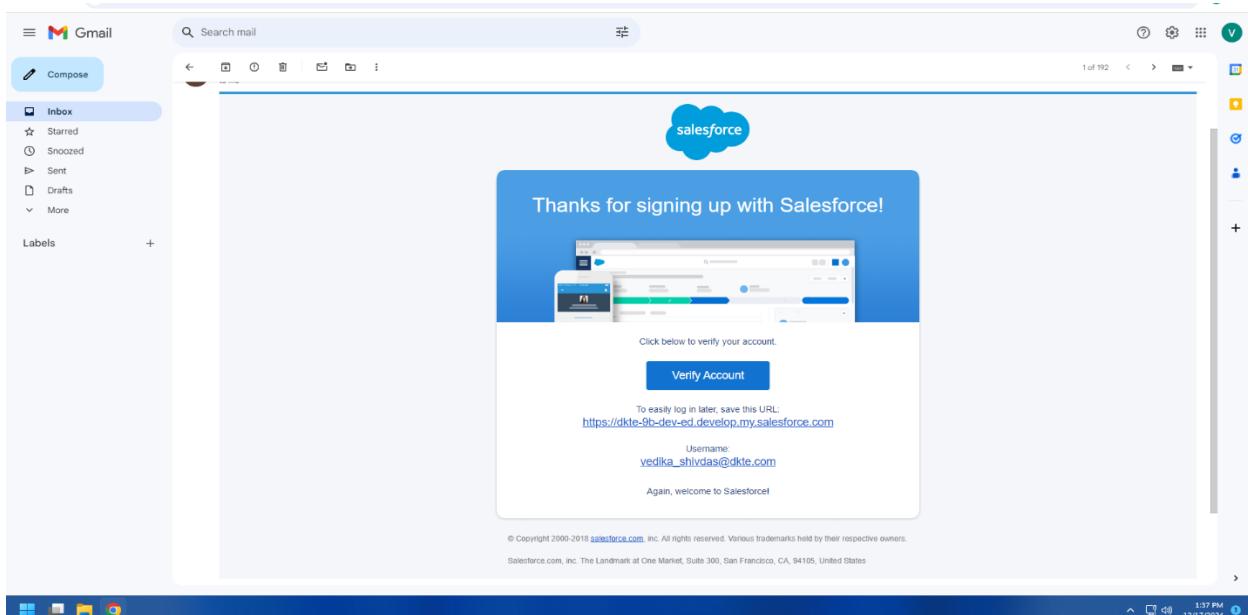
# Salesforce

## Creating Developer Account:

### Creating a developer org in salesforce.



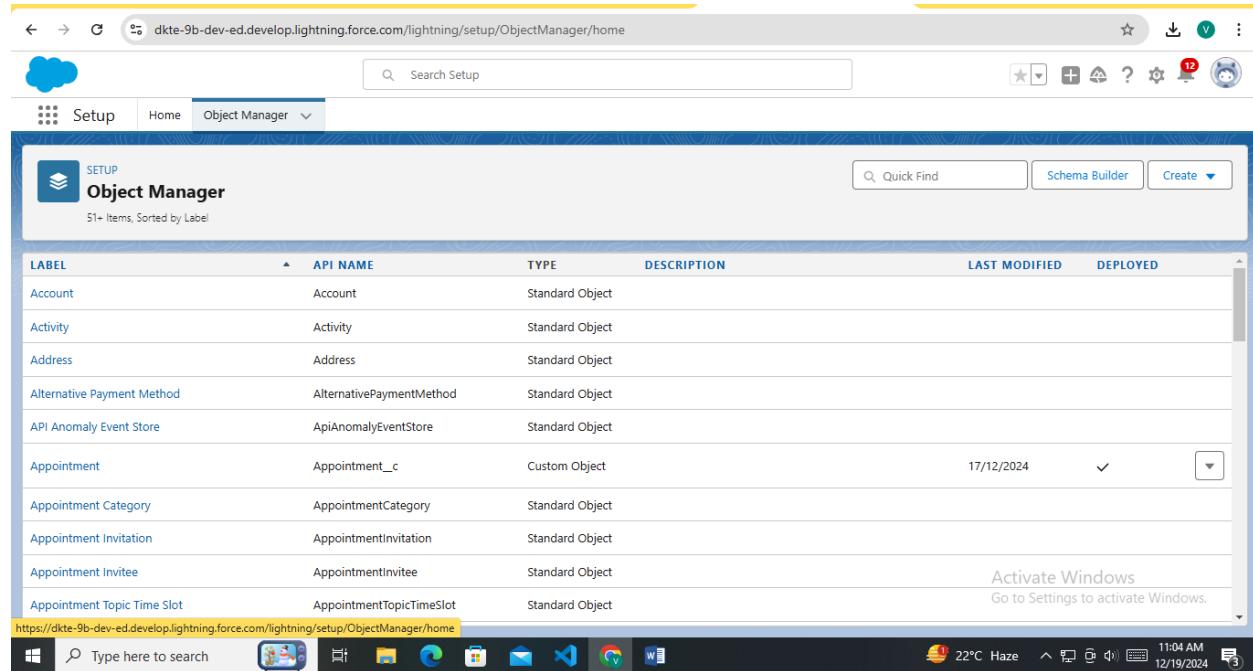
## Account Activation



Then you will redirect to your salesforce setup page.

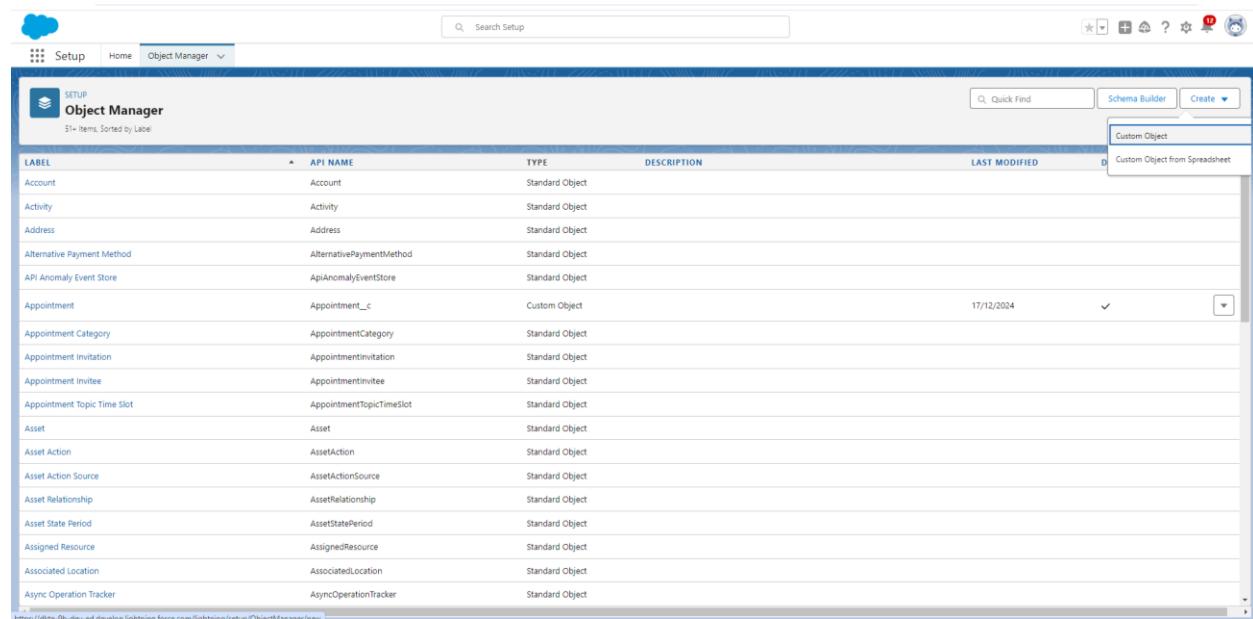
The screenshot shows the Salesforce Setup interface with the 'Roles' page open. The URL in the browser is <https://dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/Roles/page?address=%2F0OENS0000E27G%3Fsetupid%3DRoles>. The page title is 'Roles | Salesforce'. The left sidebar shows various setup categories like Service Setup Assistant, Commerce Setup Assistant, and Administration. The main content area displays the 'Role Detail' for the 'sales person' role, which reports to 'Manager'. It lists 'Modified By' as Vedula Koravi, 'Opportunity Access', and 'Case Access'. Below this, the 'Users in sales person Role' section shows two users: 'sakshi kamble' (alias skamb, username sakshi\_12@dkte.com) and 'bhumi mane' (alias bmane, username mikkid@dkte.com). A tooltip for 'Activate Windows' is visible on the right side of the screen.

# Object



The screenshot shows the Salesforce Object Manager page at <https://dkte-9b-dev-ed.lightning.force.com/lightning/setup/ObjectManager/home>. The page displays a table of 51 standard objects, sorted by Label. The columns are labeled: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The DEPLOYED column for the Appointment object shows a checkmark and a dropdown arrow. The last row of the table, for Appointment Topic Time Slot, has a note: "Activate Windows" and "Go to Settings to activate Windows." The browser status bar at the bottom shows the URL again.

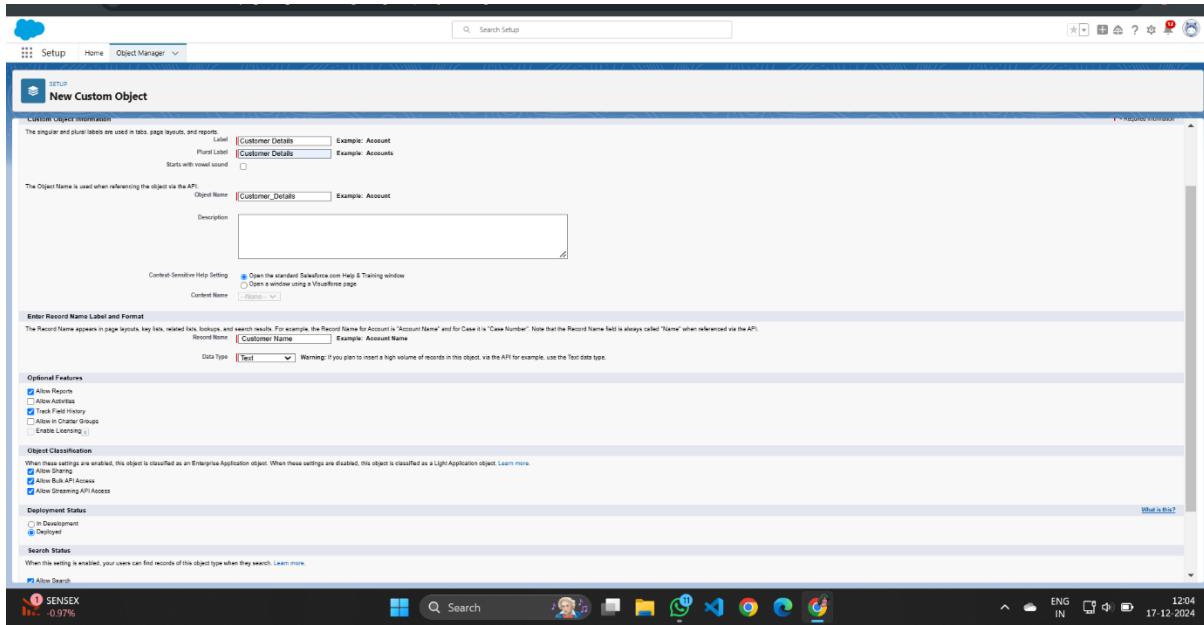
LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Address	Address	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment	Appointment_c	Custom Object		17/12/2024	✓
Appointment Category	AppointmentCategory	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
					Activate Windows Go to Settings to activate Windows.



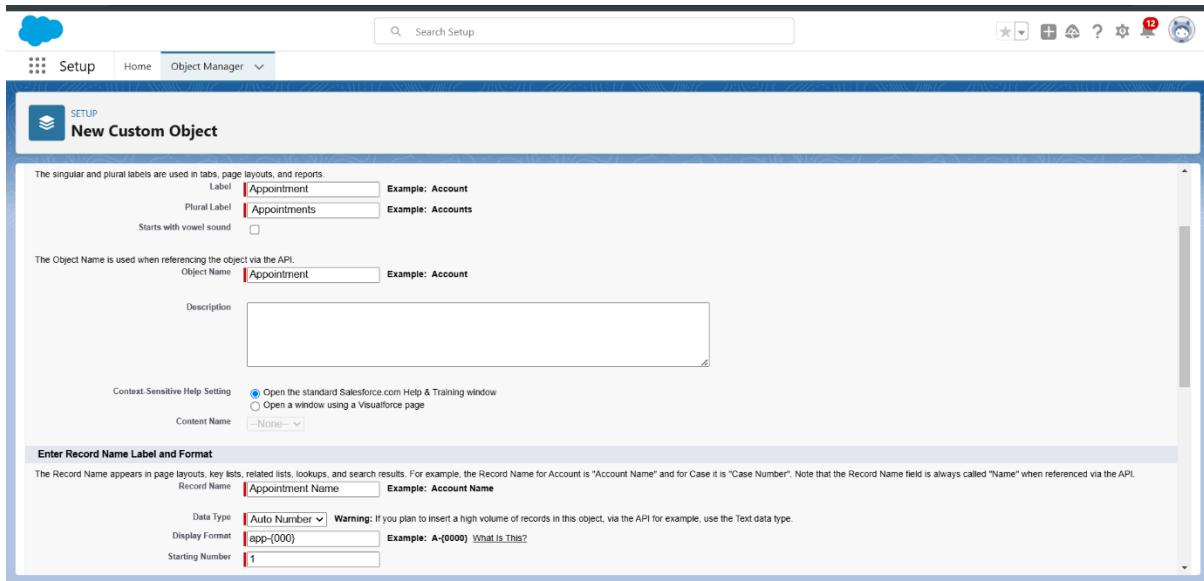
The screenshot shows the same Salesforce Object Manager page as the first one, but with a context menu open over the Appointment object in the table. The menu items shown are "Custom Object" and "Custom Object from Spreadsheet". The rest of the page content and interface are identical to the first screenshot.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Address	Address	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object			
Appointment	Appointment_c	Custom Object		17/12/2024	✓
Appointment Category	AppointmentCategory	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Asset	Asset	Standard Object			
Asset Action	AssetAction	Standard Object			
Asset Action Source	AssetActionSource	Standard Object			
Asset Relationship	AssetRelationship	Standard Object			
Asset State Period	AssetStatePeriod	Standard Object			
Assigned Resource	AssignedResource	Standard Object			
Associated Location	AssociatedLocation	Standard Object			
Async Operation Tracker	AsyncOperationTracker	Standard Object			

## Create Customer Details Object



## Create Appointment Object



# Create Service records Object

The screenshot shows the 'New Custom Object' page in the Salesforce Setup interface. The object name is 'Service records'. The 'Record Name' field is set to 'Service records Name'. The 'Data Type' is 'Auto Number' and the 'Display Format' is 'SER-{000}'. The 'Starting Number' is '1'. Under 'Optional Features', 'Allow Reports' and 'Track Field History' are checked. The 'Object Classification' section indicates it's an Enterprise Application object. Deployment status is 'Deployed'. Search status is enabled. Object creation options include 'Add Notes and Attachments related list to default page layout' and 'Launch New Custom Tab Wizard after saving this custom object'. Buttons at the bottom include 'Save', 'Save & New', and 'Cancel'.

This screenshot shows the continuation of the 'New Custom Object' page. It includes sections for 'Enter Record Name Label and Format' (Record Name: 'Service records Name', Data Type: 'Auto Number', Display Format: 'SER-{000}', Starting Number: '1'), 'Optional Features' (checked: Allow Reports, Track Field History), 'Object Classification' (Enterprise Application), 'Deployment Status' (Deployed), 'Search Status' (Allow Search checked), and 'Object Creation Options' (checkboxes for notes/attachments and custom tab wizard). The bottom of the page has 'Save', 'Save & New', and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface under the Object Manager. A sidebar on the left lists various configuration categories like Fields & Relationships, Page Layouts, and Triggers. The main pane displays the 'Service records' object details. The 'Details' tab is selected, showing fields such as API Name (Service\_records\_\_c), Singular Label (Service records), and Plural Label (Service records). On the right, there are sections for Reports, Activities, Field History, Deployment Status, and Help Settings. Buttons for Edit and Delete are at the top right.

## Create Billing details and feedback Object

The screenshot shows the Salesforce Setup interface under the Object Manager. The main pane displays a list of objects, with the 'Custom Object' filter selected. The table includes columns for Label, API Name, Type, Description, and Last Modified. Standard objects like Account, Activity, and Address are listed, along with several custom objects. A 'Create' button is visible at the top right.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED
Account	Account	Standard Object		
Activity	Activity	Standard Object		
Address	Address	Standard Object		
Alternative Payment Method	AlternativePaymentMethod	Standard Object		
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object		
Appointment	Appointment_c	Custom Object		17/12/2024
Appointment Category	AppointmentCategory	Standard Object		
Appointment Invitation	AppointmentInvitation	Standard Object		
Appointment Invitee	AppointmentInvitee	Standard Object		
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object		
Asset	Asset	Standard Object		
Asset Action	AssetAction	Standard Object		
Asset Action Source	AssetActionSource	Standard Object		
Asset Relationship	AssetRelationship	Standard Object		
Asset State Period	AssetStatePeriod	Standard Object		
Assigned Resource	AssignedResource	Standard Object		
Associated Location	AssociatedLocation	Standard Object		
Async Operation Tracker	AsyncOperationTracker	Standard Object		

**SETUP** New Custom Object

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label	Billing details and feedback	Example: Account
Plural Label	Billing details and feedback	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	

The Object Name is used when referencing the object via the API.

Object Name	Billing_details_and_feedback	Example: Account
-------------	------------------------------	------------------

Description

Context Sensitive Help Setting

<input checked="" type="radio"/> Open the standard Salesforce.com Help & Training window
<input type="radio"/> Open a window using a Visualforce page

Content Name

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name	Billing details and feedback	Example: Account Name
-------------	------------------------------	-----------------------

Data Type

Auto Number	Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.
-------------	--

Display Format

bill-(000)	Example: A-(0000) What is This?
------------	---------------------------------

Starting Number

1
---

Optional Features

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#)

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

Deployment Status

- In Development
- Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

- Allow Search

Object Creation Options (Available only when custom object is first created)

- Add Notes and Attachments related list to default page layout
- Launch New Custom Tab Wizard after saving this custom object

**Save** **Save & New** **Cancel**

The screenshot shows the Salesforce Setup interface with the following details:

**Header:** Search Setup, various icons for navigation and help.

**Breadcrumbs:** SETUP > OBJECT MANAGER

**Section:** Billing details and feedback

**Left Sidebar (Details):**

- Fields & Relationships
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lockup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Object Access
- Triggers
- Flow Triggers
- Validation Rules
- Conditional Field Formatting

**Right Panel (Details):**

**Description:** Description field is empty.

**API Name:** Billing\_detailz\_and\_feedback\_\_c

**Custom:** ✓

**Singular Label:** Billing details and feedback

**Plural Label:** Billing details and feedback

**Enable Reports:** ✓

**Track Activities:** ✓

**Track Field History:** ✓

**Deployment Status:** Deployed

**Help Settings:** Standard salesforce.com Help Window

**Buttons:** Edit, Delete

# Tabs

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar includes 'User Interface' sections for 'Rename Tabs and Labels' and 'Tabs'. The main content area is titled 'Custom Tabs' and describes how to create new custom tabs to extend Salesforce functionality or build new application functionality. It lists five categories: 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', 'Lightning Component Tabs', and 'Lightning Page Tabs', each with a 'New' button and a 'What Is This?' link.

The screenshot shows the 'New Custom Object Tab' wizard, Step 1 of 3. The title is 'Step 1. Enter the Details'. It prompts the user to choose a custom object for the new tab. A dropdown menu shows 'Object' set to 'Customer Details' and 'Tab Style' set to 'Regular'. Below this, there is an optional field for a 'Splash Page Custom Link' with a dropdown set to 'None'. A text input field for 'Description' is present, and at the bottom right are 'Next' and 'Cancel' buttons.

Screenshot of the Salesforce Setup interface showing the creation of a new custom object tab.

The page title is "New Custom Object Tab" under the "Tabs" section of the "Setup" menu.

**Step 2. Add to Profiles**

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
Authenticated Website	Default On
Authenticated Website	Default On
B2B Reordering Portal Buyer Profile	Default On
Contract Manager	Default On
Cross Org Data Proxy User	Default On
Custom Marketing Profile	Default On
Custom Sales Profile	Default On
Custom Support Profile	Default On
Customer Community Login User	Default On
Customer Community Plus Login User	Default On
Customer Community Plus User	Default On
Customer Community User	Default On
Customer Portal Manager Custom	Default On
Customer Portal Manager Standard	Default On
External Apps Login User	Default On
External Identity User	Default On

**Step 3. Add to Custom Apps**

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.

Include Tab

Custom App	Include Tab
Platform (standard__Platform)	<input type="checkbox"/>
Sales (standard__Sales)	<input type="checkbox"/>
Service (standard__Service)	<input type="checkbox"/>
Marketing CRM Classic (standard__Marketing)	<input type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>
Community (standard__Community)	<input type="checkbox"/>
Site.com (standard__Sites)	<input type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input type="checkbox"/>
Content (standard__Content)	<input type="checkbox"/>
Analytics Studio (standard__Insights)	<input type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input type="checkbox"/>
Service Console (standard__LightningService)	<input type="checkbox"/>
Sales (standard__LightningSales)	<input type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input type="checkbox"/>
Queue Management (standard__QueueManagement)	<input type="checkbox"/>
Data Manager (standard__DataManager)	<input type="checkbox"/>
Subscription Management (standard__RevenueCloudConsole)	<input type="checkbox"/>
Business Rules Engine (standard__FormulasAndEvents)	<input type="checkbox"/>

The screenshot shows the Salesforce Setup interface with the 'Tabs' page open. The top navigation bar includes tabs for 'Gmail', 'Student - Skill Wallet', 'Tabs | Salesforce', and 'Home | Salesforce'. The main content area has a search bar labeled 'Search Setup' and a sidebar with sections for 'User Interface' (including 'Rename Tabs and Labels' and 'Tabs') and 'Q\_ tabs'. The main pane displays a list of standard tabs with checkboxes on the right. A checked checkbox at the bottom left says 'Append tab to users' existing personal customizations'. At the bottom right are 'Previous', 'Save', and 'Cancel' buttons. The status bar at the bottom right shows '2:01 PM 12/17/2024'.

**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**

Action	Label	Tab Style	Description
Edit	Customer Details	Airplane	

**Web Tabs**

No Web Tabs have been defined.

**Visualforce Tabs**

No Visualforce Tabs have been defined.

**Lightning Component Tabs**

No Lightning component tabs have been defined.

**Lightning Page Tabs**

No Lightning Page Tabs have been defined.

Screenshot of the Salesforce Setup interface showing the 'New Custom Object Tab' configuration page.

**Step 1. Enter the Details**

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

**New Custom Object Tab**

**Object:** Appointment

**Tab Style:** Alert clock

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

**Description:** [Empty text area]

**Next | Cancel**

Screenshot of the Salesforce Setup interface showing the 'New Custom Object Tab' configuration page, Step 2.

**Step 2. Add to Profiles**

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
Authenticated Website	Default On
Authenticated Website	Default On
B2B Recurring Portal Buyer Profile	Default On
Contract Manager	Default On
Cross Org Data Proxy User	Default On
Custom Marketing Profile	Default On
Custom: Sales Profile	Default On
Custom: Support Profile	Default On
Customer Community Login User	Default On
Customer Community Plus Login User	Default On
Customer Community Plus User	Default On
Customer Community User	Default On
Customer Portal Manager Custom	Default On
Customer Portal Manager Standard	Default On
External Apps Login User	Default On
External Identity User	Default On

Screenshot of the Salesforce Setup interface showing the "Tabs" configuration page.

The page title is "Step 3. Add to Custom Apps".

The sub-header says: "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."

A checkbox labeled "Include Tab" is checked.

The list of available custom apps includes:

- 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)
- Sales Console (standard\_\_LightningSalesConsole)
- Service Console (standard\_\_LightningService)
- Sales (standard\_\_LightningSales)
- Lightning Usage App (standard\_\_LightningInstrumentation)
- Digital Experiences (standard\_\_SalesforceCMS)
- Queue Management (standard\_\_QueueManagement)
- Data Manager (standard\_\_DataManager)
- Subscription Management (standard\_\_RevenueCloudConsole)
- Business Rules Engine (standard\_\_ExpressionEngineConsole)

At the bottom of the list, there is a checked checkbox: "Append tab to users' existing personal customizations".

Buttons at the bottom right include: Previous, Save, and Cancel.

System status bar at the bottom right shows: 2:02 PM 12/17/2024

The screenshot shows the Salesforce Setup interface with the 'Custom Tabs' page open. The top navigation bar includes tabs for 'Gmail', 'Student - Skill Wallet', 'Tabs | Salesforce', and 'Home | Salesforce'. The main content area has a header 'Custom Tabs' with a 'Help for this Page' link. Below the header, there's a note about creating new custom tabs to extend Salesforce functionality. A table lists 'Custom Object Tabs' with two entries: 'Accounts' (Action: Edit, Label: Accounts) and 'Customer Details' (Action: Edit, Label: Customer Details). Below this are sections for 'Web Tabs' (No Web Tabs have been defined), 'Visualforce Tabs' (No Visualforce Tabs have been defined), 'Lightning Component Tabs' (No Lightning component tabs have been defined), and 'Lightning Page Tabs' (No Lightning Page Tabs have been defined).

The screenshot shows the 'New Custom Object Tab' wizard, Step 1 of 3. The top navigation bar is identical to the previous screenshot. The main content area has a header 'New Custom Object Tab' with a 'Help for this Page' link. It starts with a step 1 title 'Enter the Details' and a note: 'Choose the custom object for this new custom tab. Fill in other details.' A form section titled 'New Custom Object Tab' contains fields for 'Object' (set to 'Billing details and feedback'), 'Tab Style' (set to 'List'), and an optional 'Splash Page Custom Link' dropdown set to 'None'. Below the form is a 'Description' field with a placeholder 'Enter a short description.' At the bottom right are 'Next' and 'Cancel' buttons.

Screenshot of the Salesforce Setup interface showing the creation of a new custom object tab.

The page title is "New Custom Object Tab" under the "Tabs" section of the "User Interface" category.

**Step 2. Add to Profiles**

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
Authenticated Website	Default On
Authenticated Website	Default On
B2B Reordering Portal Buyer Profile	Default On
Contract Manager	Default On
Cross Org Data Proxy User	Default On
Custom Marketing Profile	Default On
Custom Sales Profile	Default On
Custom Support Profile	Default On
Customer Community Login User	Default On
Customer Community Plus Login User	Default On
Customer Community Plus User	Default On
Customer Community User	Default On
Customer Portal Manager Custom	Default On
Customer Portal Manager Standard	Default On
External Apps Login User	Default On
External Identity User	Default On

**Step 3. Add to Custom Apps**

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.

Include Tab

Custom App	Include Tab
Platform (standard__Platform)	<input type="checkbox"/>
Sales (standard__Sales)	<input type="checkbox"/>
Service (standard__Service)	<input type="checkbox"/>
Marketing CRM Classic (standard__Marketing)	<input type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>
Community (standard__Community)	<input type="checkbox"/>
Site.com (standard__Sites)	<input type="checkbox"/>
Salesforce Chatter (standard__Chatter)	<input type="checkbox"/>
Content (standard__Content)	<input type="checkbox"/>
Analytics Studio (standard__Insights)	<input type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input type="checkbox"/>
Service Console (standard__LightningService)	<input type="checkbox"/>
Sales (standard__LightningSales)	<input type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input type="checkbox"/>
Queue Management (standard__QueueManagement)	<input type="checkbox"/>
Data Manager (standard__DataManager)	<input type="checkbox"/>
Subscription Management (standard__RevenueCloudConsole)	<input type="checkbox"/>
Business Rules Engine (standard__FormulasAndEvents)	<input type="checkbox"/>

Screenshot of the Salesforce Setup interface showing the 'Tabs' page under 'User Interface'.

The 'Custom Tabs' section lists various standard tabs:

- 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)
- Sales Console (standard\_\_LightningSalesConsole)
- Service Console (standard\_\_LightningService)
- Sales (standard\_\_LightningSales)
- Lightning Usage App (standard\_\_LightningInstrumentation)
- Digital Experiences (standard\_\_SalesforceCMS)
- Queue Management (standard\_\_QueueManagement)
- Data Manager (standard\_\_DataManager)
- Subscription Management (standard\_\_RevenueCloudConsole)
- Business Rules Engine (standard\_\_ExpressionConsole)
- Salesforce Scheduler Setup (standard\_\_LightningScheduler)
- Bolt Solutions (standard\_\_LightningBolt)
- Automation (standard\_\_FlowApp)

A checkbox at the bottom left is checked:  Append tab to users' existing personal customizations.

At the bottom right of the page header: Previous, Save, Cancel.

System status bar at the bottom right: 2:03 PM, 12/17/2024.

**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**

Action	Label	Tab Style	Description
Edit	Alerts	Alarm clock	
Edit	Billing details and feedback	Bell	
Edit	Customer Details	Airplane	

**Web Tabs**

New | What Is This? No Web Tabs have been defined.

**Visualforce Tabs**

New | What Is This? No Visualforce Tabs have been defined.

**Lightning Component Tabs**

New | What Is This? No Lightning component tabs have been defined.

**Lightning Page Tabs**

New | What Is This? No Lightning Page Tabs have been defined.

Screenshot of the Salesforce Setup interface showing the 'New Custom Object Tab' configuration page. The tab is titled 'Service records'. The 'Tab Style' is set to 'Galleria'. The 'Splash Page Custom Link' dropdown is set to 'None'. A description box is empty.

Screenshot of the Salesforce Setup interface showing the 'Step 2. Add to Profiles' configuration page. The 'Profile' list includes various user profiles like Analytics Cloud Integration User, Analytics Cloud Secure User, etc. The 'Tab Visibility' column shows 'Default On' for most profiles except for 'B2B Recurring Portal Buyer Profile' which has 'Default Off'. The status bar at the bottom indicates the time is 2:03 PM on 12/17/2024.

Screenshot of the Salesforce Setup interface showing the 'Tabs' configuration screen.

The page title is "Setup | Tabs".

The main heading is "Step 3. Add to Custom Apps".

Sub-headings include "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." and "Custom App".

The list of standard tabs includes:

- 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)
- Sales Console (standard\_\_LightningSalesConsole)
- Service Console (standard\_\_LightningService)
- Sales (standard\_\_LightningSales)
- Lightning Usage App (standard\_\_LightningInstrumentation)
- Digital Experiences (standard\_\_SalesforceCMS)
- Queue Management (standard\_\_QueueManagement)
- Data Manager (standard\_\_DataManager)
- Subscription Management (standard\_\_RevenueCloudConsole)
- Business Rules Engine (standard\_\_ExpressionEditConsole)

A checkbox labeled "Include Tab" is present at the top right of the list.

At the bottom of the list, there is a checked checkbox labeled "Append tab to users' existing personal customizations".

Buttons at the bottom right include "Previous", "Save", and "Cancel".

The status bar at the bottom right shows the time as 2:03 PM and the date as 12/17/2024.

Gmail Student - Skill Wallet Tabs | Salesforce Home | Salesforce

Setup Home Object Manager

Search Setup

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.

Help for this Page

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

Custom Object Tabs

Action	Label	Tab Style	Description
Edit   Del	Announcements	Alarm clock	
Edit   Del	Billing details and feedback	Bell	
Edit   Del	Customer Details	Airplane	
Edit   Del	Service records	Guitar	

Web Tabs

No Web Tabs have been defined

Visualforce Tabs

No Visualforce Tabs have been defined

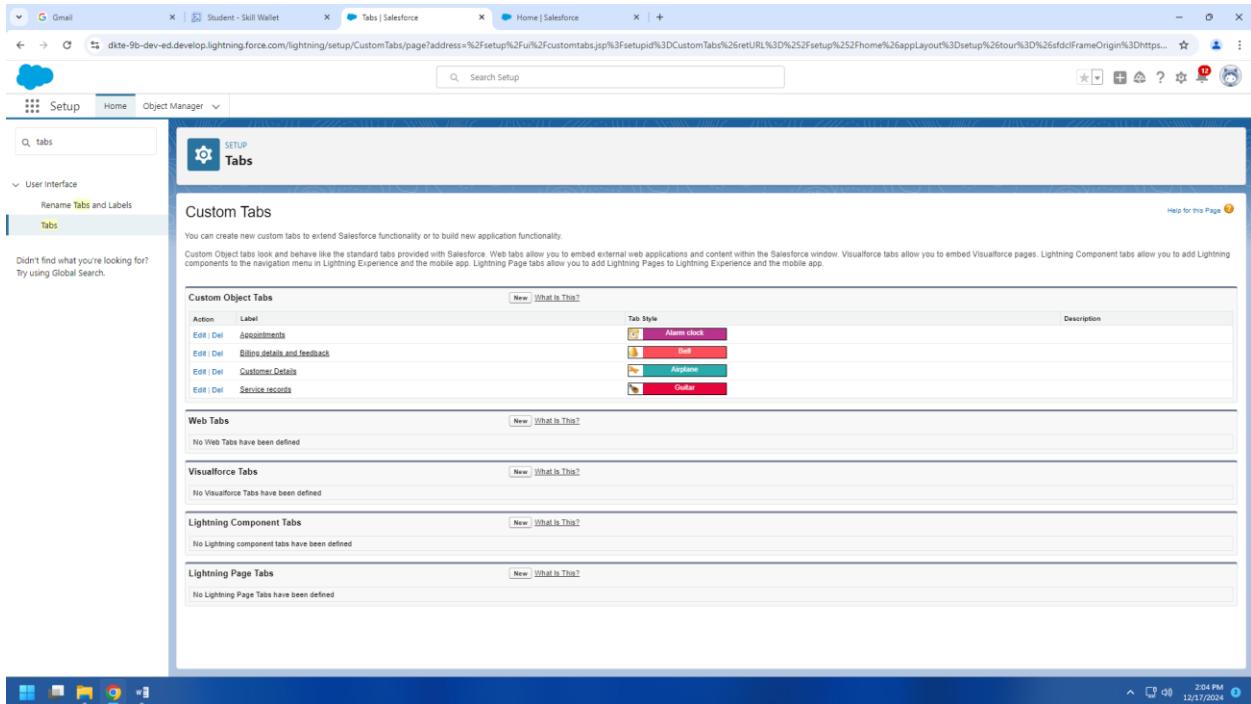
Lightning Component Tabs

No Lightning component tabs have been defined

Lightning Page Tabs

No Lightning Page Tabs have been defined

2:04 PM 12/17/2024



# The Lightning App

## Create a Lightning App

The screenshot shows two views of the Salesforce App Manager.

**Top View:** The "Lightning Experience App Manager" page displays a list of 23 available apps. The columns include App Name, Developer Name, Description, Last Modified Date, App Type, and Visibility. Most apps are listed as "Lightning" type, while some like All Tabs, Insights, and App Launcher are "Classic".

App Name	Developer Name	Description	Last Modified Date	App Type	Visible...
All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	17/12/2024, 12:47 pm	Classic	✓
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	17/12/2024, 12:47 pm	Classic	✓
App Launcher	AppLauncher	App Launcher tabs	17/12/2024, 12:47 pm	Classic	✓
Automation	FlowsApp	Automate business processes and repetitive tasks.	17/12/2024, 12:53 pm	Lightning	✓
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	17/12/2024, 12:59 pm	Lightning	✓
Business Rules Engine	ExpressionSetConsole	Create and maintain business rules that perform complex lookups and calculations.	17/12/2024, 12:47 pm	Lightning	✓
Community	Community	Salesforce CRM Communities	17/12/2024, 12:47 pm	Classic	✓
Content	Content	Salesforce CRM Content	17/12/2024, 12:47 pm	Classic	✓
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	17/12/2024, 12:47 pm	Lightning	✓
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	17/12/2024, 12:47 pm	Lightning	✓
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	17/12/2024, 12:47 pm	Lightning	✓
Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	17/12/2024, 12:47 pm	Classic	✓
Platform	Platform	The fundamental Lightning Platform	17/12/2024, 12:47 pm	Classic	✓
Queue Management	QueueManagement	Create and manage queues for your business.	17/12/2024, 12:47 pm	Lightning	✓
Sales	Sales	The world's most popular sales force automation (SFA) solution	17/12/2024, 12:47 pm	Classic	✓
Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	17/12/2024, 12:47 pm	Lightning	✓
Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	17/12/2024, 12:47 pm	Lightning	✓
Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	17/12/2024, 12:47 pm	Classic	✓
Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	17/12/2024, 12:49 pm	Lightning	✓
Service	Service	Manage customer service with accounts, contacts, cases, and more	17/12/2024, 12:47 pm	Classic	✓
Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across customer service channels on one screen	17/12/2024, 12:47 pm	Lightning	✓

**Bottom View:** The "New Lightning App" creation interface. It shows fields for App Details (Name: Garage Management Application, Developer Name: Garage\_Management\_Application), App Branding (Image upload, Primary Color Hex: #0070D2), and App Launcher Preview (GM logo). A sidebar lists recently used apps.

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: Garage Management Application

\* Developer Name: Garage\_Management\_Application

Description: Enter a description...

App Branding

Image:  Upload

Primary Color Hex: #0070D2

Org Theme Options:  Use the app's image and color instead of the org's custom theme

App Launcher Preview

Next

Screenshot of the Salesforce Setup interface showing the creation of a new Lightning App.

The "App Options" screen displays the following configuration:

- Navigation and Form Factor**:
  - Navigation Style: Standard navigation (selected)
  - Supported Form Factors: Desktop and phone (selected)
- Setup and Personalization**:
  - Setup Experience: Setup (full set of Setup options) (selected)
  - App Personalization Settings:
    - Disable end user personalization of nav items in this app (unchecked)
    - Disable temporary tabs for items outside of this app (unchecked)
    - Use Omni-Channel sidebar (unchecked)

The "Utility Items (Desktop Only)" section shows the following configuration:

- Add Utility Item: Default
- Description: 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.
- Image: A screenshot of a desktop application window with a utility bar at the bottom containing various icons.
- Text: To enable the utility bar for this app, add a utility item.

The "New Lightning App" summary table lists the following apps:

ID	Name	Type	Description	Created Date	Experience	Status
18	Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	17/12/2024, 12:47 pm	Classic	✓
19	Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling	17/12/2024, 12:49 pm	Lightning	✓
20	Service	Service	Manage customer service with accounts, contacts, cases, and more	17/12/2024, 12:47 pm	Classic	✓
21	Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records across customer service channels on one screen	17/12/2024, 12:47 pm	Lightning	✓

Gmail Student - Skill Wallet App Manager | Salesforce Home | Salesforce

Search Setup

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 Selected Items

Customer Details  
Appointments  
Service records  
Billing details and feedback  
Dashboards

Back Next

18 Salesforce Chatter Chatter The Salesforce Chatter social network, including profiles and feeds 17/12/2024, 12:47 pm Classic ✓  
19 Salesforce Scheduler Setup LightningScheduler Set up personalized appointment scheduling. 17/12/2024, 12:49 pm Lightning ✓  
20 Service Service Manage customer service with accounts, contacts, cases, and more 17/12/2024, 12:47 pm Classic ✓  
21 Service Console LightningService (Lightning Experience) Lets support agents work with multiple records across customer service channels on one screen 17/12/2024, 12:47 pm Lightning ✓

Setup Home Object Manager

Search Setup

New Lightning App

User Profiles

Choose the user profiles that can access this app.

Available Profiles Selected Profiles

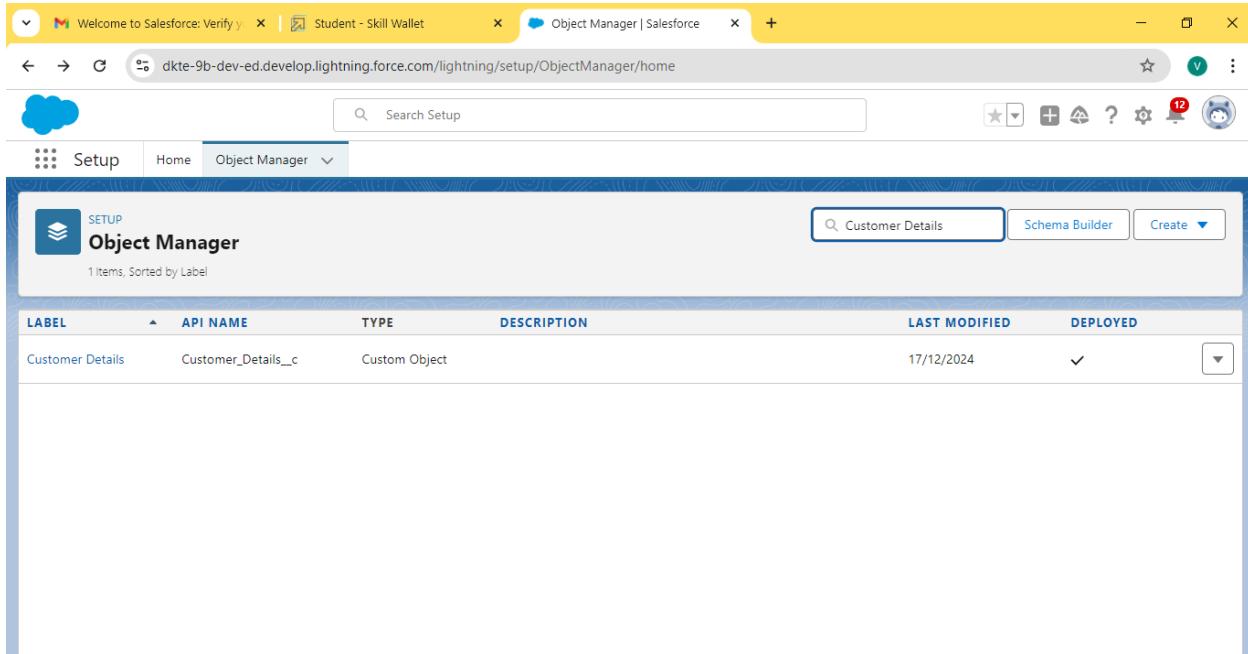
System administrator

Save & Finish

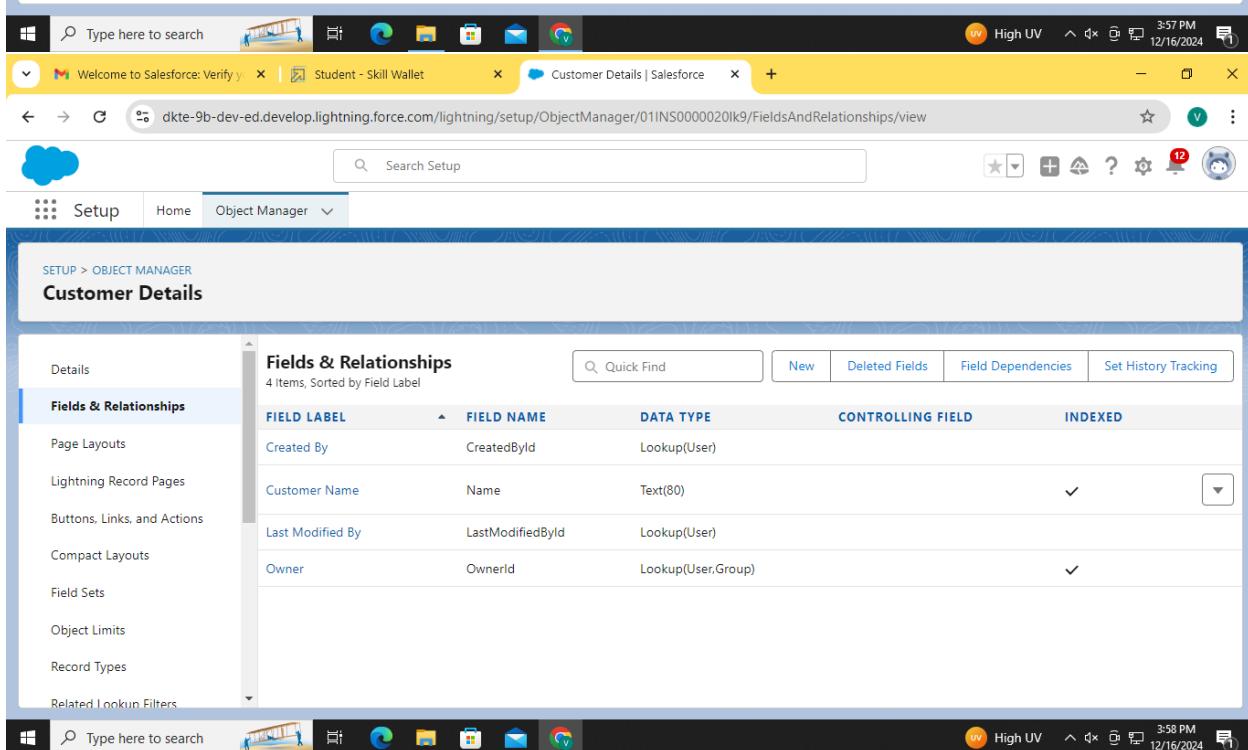
18 Salesforce Chatter Chatter The Salesforce Chatter social network, including profiles and feeds 17/12/2024, 12:47 pm Classic ✓  
19 Salesforce Scheduler Setup LightningScheduler Set up personalized appointment scheduling. 17/12/2024, 12:49 pm Lightning ✓  
20 Service Service Manage customer service with accounts, contacts, cases, and more 17/12/2024, 12:47 pm Classic ✓  
21 Service Console LightningService (Lightning Experience) Lets support agents work with multiple records across customer service channels on one screen 17/12/2024, 12:47 pm Lightning ✓

# Fields

## Creation of fields for the Customer Details object



The screenshot shows the Salesforce Object Manager interface. At the top, there are two tabs: "Welcome to Salesforce: Verify" and "Object Manager | Salesforce". The "Object Manager" tab is active. Below the tabs, there is a search bar with the placeholder "Search Setup" and a "Customer Details" button. The main area is titled "Object Manager" and shows a table with one item: "Customer Details" (Label), "Customer\_Details\_\_c" (API Name), "Custom Object" (Type), and "17/12/2024" (Last Modified). There is also a "Create" button.

The screenshot shows the "Fields & Relationships" page for the "Customer Details" object. The left sidebar has a "Details" section and a "Fields & Relationships" section, which is currently selected. The main table lists four fields: "Created By" (Field Label), "CreatedBy" (Field Name), "Lookup(User)" (Data Type), and "Last Modified By" (Controlling Field); "Customer Name" (Field Label), "Name" (Field Name), "Text(80)" (Data Type), and "Owner" (Controlling Field); "Last Modified By" (Field Label), "LastModifiedBy" (Field Name), "Lookup(User)" (Data Type), and "Owner" (Controlling Field); and "Owner" (Field Label), "OwnerId" (Field Name), "Lookup(User,Group)" (Data Type), and "Owner" (Controlling Field). There are "New", "Deleted Fields", "Field Dependencies", and "Set History Tracking" buttons at the top of the table.

**Customer Details**

**Fields & Relationships**

**Date**

- Date
- Date/Time

**Email**

- Email

**Geolocation**

- Geolocation

**Number**

- Number

**Percent**

- Percent

**Phone**

- Phone

**Picklist**

- Picklist

**Picklist (Multi-Select)**

- Picklist (Multi-Select)

**Text**

- Text

**Text Area**

- Text Area

**Text Area (Long)**

- Text Area (Long)

**Text Area (Rich)**

**Customer Details**

**New Custom Field**

**Step 2. Enter the details** Step 2 of 4

Field Label:

Field Name:

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:

Use formula editor: Enclose text and picklist values/API names in double quotes: ("Text", "Text"), include numbers without quotes: (20), show percentages as decimals (.10), and express date calculations in the standard format: (Today() + 7). To reference a field from a Custom Metadata type record use: \${CustomMetadata\_Type\_\_mdt.RecordAPIName.Field\_\_c}

Salesforce: Verify | Student - Skill Wallet | Customer Details | Salesforce

dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020lk9/FieldsAndRelationships/new

Setup Home Object Manager

SETUP > OBJECT MANAGER

## Customer Details

New Custom Field

Step 3. Establish field-level security

Step 3 of 4

Field Label: Phone number  
Data Type: Phone  
Field Name: Phone\_number  
Description:

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

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

Help for this Page

Previous Next Cancel

The screenshot shows the Salesforce Setup interface for creating a new custom field. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area is titled "Customer Details New Custom Field" under "Step 4. Add to page layouts". The field details are as follows:

Field Label	Phone number
Data Type	Phone
Field Name	Phone_number
Description	

Below these details, instructions say to select page layouts for the field. Two checkboxes are checked: "Add Field" and "Page Layout Name", with "Customer Details Layout" selected. A note at the bottom says to click "Save & New" to create more fields or "Save" to finish.

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled 'Customer Details' and shows a list of field types. The 'Email' type is selected, highlighted with a blue border. A detailed description of the Email field is provided, stating it allows users to enter an email address, which is validated to ensure proper format. It also notes that if specified for a contact or lead, users can choose the address when clicking 'Send an Email'. Other field types listed include Lookup Relationship, Master-Detail Relationship, External Lookup Relationship, Checkbox, Currency, Date, DateTime, Geolocation, Number, Percent, Phone, Picklist, and Picklist (Multi-Select). The status bar at the bottom indicates it's 4:03 PM on 12/16/2024.

The screenshot shows the process of creating a new custom field. The left sidebar is identical to the previous screenshot. The main content area is titled 'Customer Details New Custom Field Step 2 of 4'. The 'Field Label' is set to 'Gmail' and the 'Field Name' is also 'Gmail'. The 'Description' and 'Help Text' fields are empty. Under 'Required', there are three checkboxes: 'Always require a value in this field in order to save a record' (unchecked), 'Unique' (unchecked), and 'External ID' (unchecked). There is also a checkbox 'Set this field as the unique record identifier from an external system' (unchecked). Under 'Auto add to custom report type', there is a checked checkbox 'Add this field to existing custom report types that contain this entity'. The 'Default Value' field contains the formula 'Show Formula Editor'. A note at the bottom explains the formula syntax. The status bar at the bottom indicates it's 4:04 PM on 12/16/2024.

Salesforce Setup - Object Manager

**Customer Details**

**New Custom Field**

**Step 3. Establish field-level security**

Field Label: Gmail  
Data Type: Email  
Field Name: Gmail  
Description:

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

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

Help for this Page Step 3 of 4 Previous Next Cancel

Windows Taskbar: Type here to search, 27°C Sunny, 4:04 PM, 12/16/2024

Salesforce Setup - Object Manager

**Customer Details**

**New Custom Field**

**Step 4. Add to page layouts**

Field Label: Gmail  
Data Type: Email  
Field Name: Gmail  
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.

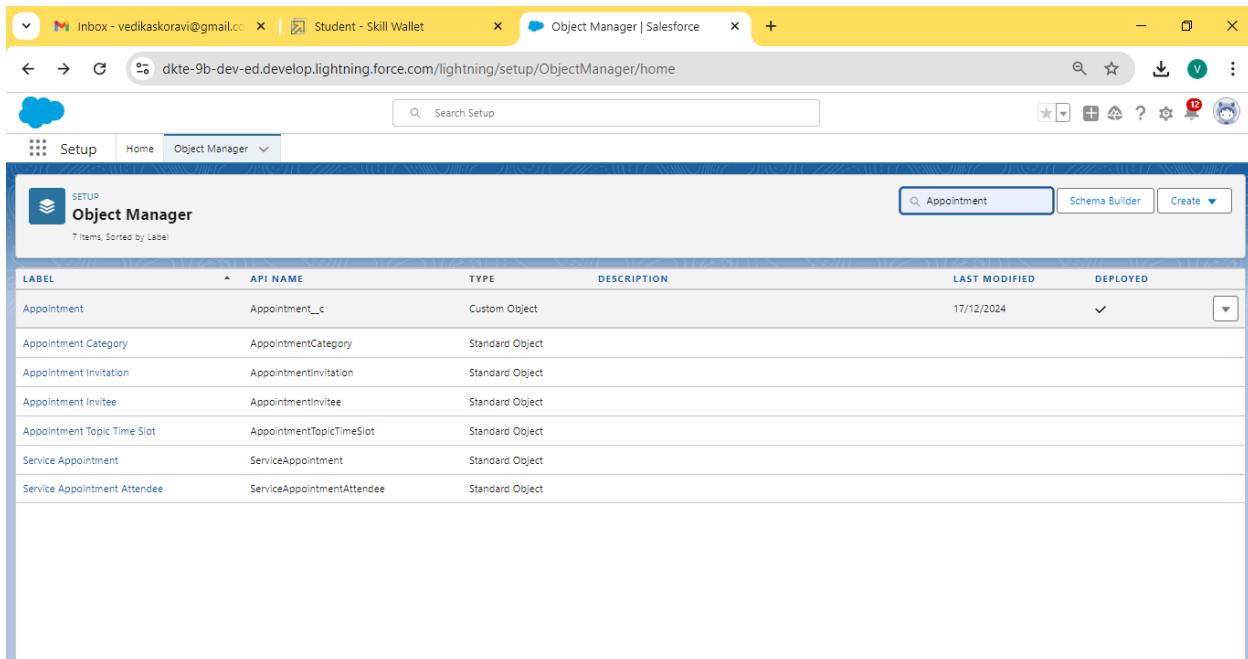
Add Field  Page Layout Name  
 Customer Details Layout

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

Help for this Page Step 4 of 4 Previous Save & New Save Cancel

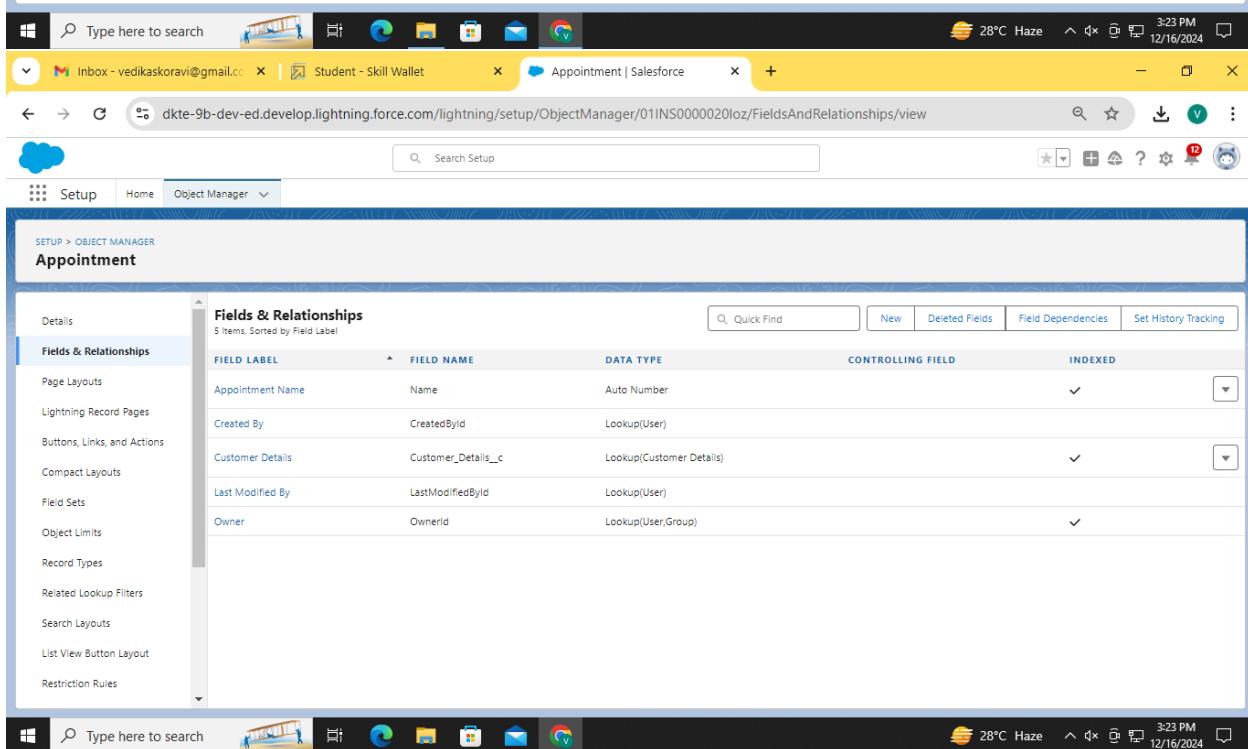
Windows Taskbar: Type here to search, 27°C Sunny, 4:04 PM, 12/16/2024

## Creation of Lookup Fields



The screenshot shows the Salesforce Object Manager page. The table lists the following objects:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Appointment	Appointment_c	Custom Object		17/12/2024	✓
Appointment Category	AppointmentCategory	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Service Appointment	ServiceAppointment	Standard Object			
Service Appointment Attendee	ServiceAppointmentAttendee	Standard Object			

The screenshot shows the Salesforce Object Manager page for the Appointment object. The left sidebar shows navigation options like Details, Fields & Relationships, Page Layouts, etc. The main area displays the "Fields & Relationships" section with the following fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment Name	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Customer Details	Customer_Details_c	Lookup(Customer Details)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

The screenshot shows the Salesforce Setup interface for the 'Appointment' object. The left sidebar lists various configuration options under 'SETUP > OBJECT MANAGER'. The 'Fields & Relationships' section is currently selected. A large panel on the right displays a list of field types with their descriptions:

- Lookup Relationship**: Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
- Master-Detail Relationship**: Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
  - The relationship field is required on all detail records.
  - The ownership and sharing of a detail record are determined by the master record.
  - When a user deletes the master record, all detail records are deleted.
  - You can create rollup summary fields on the master record to summarize the detail records.
- External Lookup Relationship**: Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
- Checkbox**: Allows users to select a True (checked) or False (unchecked) value.
- Currency**: Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
- Date**: Allows users to enter a date or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
- 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.

The screenshot shows the 'NEW CUSTOM FIELD' wizard, Step 2: Enter the details. The 'Field Label' is set to 'Appointment Date' and the 'Field Name' is 'Appointment\_Date'. The 'Required' checkbox is checked. Other settings include 'Auto add to custom report type' and 'Add this field to existing custom report types that contain this entity'. The 'Default Value' section contains a formula editor with the following code:

```
Use formula syntax. Enclose text and picklist values in double quotes: ("This", "text"), include numbers without quotes (25), show percentages as decimals (.10), and express date calculations in the standard format: (Today) + 7. To reference a field from a Custom Metadata type record use: ${CustomMetadataType__mdt.RecordAPIName.FieldName}.
```

Screenshot of the Salesforce Object Manager setup page for the Appointment object.

The page title is "Appointment | Salesforce".

The URL is "dkte-9b-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01INS000002l0z/FieldsAndRelationships/new".

The left sidebar shows the "Fields & Relationships" section selected.

The main content area is titled "New Custom Field" and "Step 3 of 4: Establish field-level security".

Table showing field-level security settings:

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	✓	□
Contract Manager	✓	□
Cross Org Data Proxy User	✓	□
Custom: Marketing Profile	✓	□
Customer Relationship Profile	✓	□

Screenshot of the Salesforce Object Manager setup page for the Appointment object.

The page title is "Appointment | Salesforce".

The URL is "dkte-9b-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01INS000002l0z/FieldsAndRelationships/new".

The left sidebar shows the "Fields & Relationships" section selected.

The main content area is titled "Fields & Relationships" and shows a list of fields:

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

Screenshot of the Salesforce Object Manager interface showing the creation of a new custom field for the Appointment object.

The page title is "Appointment | Salesforce". The URL is "dkte-9b-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01INS0000020loz/FieldsAndRelationships/new".

The left sidebar shows the "Fields & Relationships" section selected. The main content area is titled "Appointment New Custom Field" and is on "Step 4 of 4".

Field details:

- Field Label: Appointment Date
- Data Type: Date
- Field Name: Appointment\_Date

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.

Add Field: Page Layout Name  
 Appointment Layout

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

Buttons at the bottom: Previous, Save & New, Save, Cancel.

Screenshot of the Salesforce Object Manager interface showing the creation of a new relationship for the Appointment object.

The page title is "Appointment | Salesforce". The URL is "dkte-9b-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01INS0000020loz/FieldsAndRelationships/new".

The left sidebar shows the "Fields & Relationships" section selected. The main content area is titled "Appointment New Relationship" and is on "Step 2".

Step 2: Choose the related object

Select the other object to which this object is related. Related To: Appointment

Buttons at the bottom: Previous, Next, Cancel.

Cloud icon

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 Relationship Step 3. Enter the label and name for the lookup field

Field Label: Appointment  
Field Name: Appointment  
Description:   
Help Text:   
Child Relationship Name: Appointments  
Auto add to custom report type:  Add this field to existing custom report types that contain this entity

Step 3 of 6 Previous Next Cancel

Inbox - vedikaskoravi@gmail.com Student - Skill Wallet Appointment | Salesforce

Cloud icon

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

Lookup Filter

Optional: create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

Filter Criteria: Insert suggested criteria

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

Clear Filter Criteria

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 match the 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

Type here to search

Windows Start button

28°C Haze 3:42 PM 12/16/2024

Screenshot of the Salesforce Object Manager interface showing the "Appointment" object setup. The "Fields & Relationships" tab is selected. A modal window titled "Appointment New Relationship" is open, specifically Step 4 of 6: "Establish field-level security for reference field".

**Field Label:** Appointment  
**Data Type:** Lookup  
**Field Name:** Appointment  
**Description:**

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

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

Screenshot of the Salesforce Object Manager interface showing the "Appointment" object setup. The "Fields & Relationships" tab is selected. A modal window titled "Appointment New Relationship" is open, specifically Step 5 of 6: "Add reference field to Page Layouts".

**Field Label:** Appointment  
**Data Type:** Lookup  
**Field Name:** Appointment  
**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
<input checked="" type="checkbox"/>	Appointment Layout

Screenshot of the Salesforce Object Manager interface showing the creation of a new relationship for the 'Appointment' object.

The left sidebar shows the 'Fields & Relationships' section selected. The main area displays 'Step 6. Add custom related lists' of the 'New Relationship' wizard.

**Appointment** New Relationship

Field Label: Appointment  
Data Type: Lookup  
Field Name: Appointment  
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  
 Appointment Layout

Append related list to users' existing personal customizations

Help for this Page Step 6 of 6

Previous Save & New Save Cancel

Screenshot of the Salesforce Object Manager interface showing the list of fields and relationships for the 'Appointment' object.

The left sidebar shows the 'Fields & Relationships' section selected. The main area displays a table of fields.

Fields & Relationships

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

The screenshot shows the Salesforce Object Manager page. At the top, there are tabs for Setup, Home, and Object Manager. The main area displays a table with one item:

Label	API Name	Type	Description	Last Modified	Deployed
Billing details and feedback	Billing_details_and_feedback__c	Custom Object		17/12/2024	✓

The screenshot shows the Salesforce Object Details page for the 'Billing details and feedback' object. The left sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules. The main panel displays the following details:

Details	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Description	
API Name	Billing_details_and_feedback__c
Custom	✓
Singular Label	Billing details and feedback
Plural Label	Billing details and feedback
Enable Reports	✓
Track Activities	
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Screenshot of the Salesforce Object Manager interface showing the creation of a new custom field named "Billing details and feedback".

The left sidebar shows the navigation path: SETUP > OBJECT MANAGER.

The main panel displays "Step 1. Choose the field type".

**Data Type:**

- None Selected (disabled)
- Auto Number (disabled)
- Formula (disabled)
- Roll-Up Summary (disabled)
- Lookup Relationship (selected)
- Master-Detail Relationship (disabled)

Help text for "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.

- 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.

Help for this Page

Screenshot of the Salesforce Object Manager interface showing the creation of a new relationship named "Billing details and feedback".

The left sidebar shows the navigation path: SETUP > OBJECT MANAGER.

The main panel displays "Step 2. Choose the related object".

**Related To:** Service records

Help for this Page

**Billing details and feedback**

**Step 3. Enter the label and name for the lookup field**

Field Label: Service records  
Field Name: Service\_records  
Description:  
Help Text:  
Child Relationship Name: Billing\_details\_and\_feedback  
Required:  Always require a value in this field in order to save a record  
 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

**Step 3 of 6**

**Step 4. Establish field-level security for reference field**

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	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Screenshot of the Salesforce Object Manager - Billing details and feedback setup page.

The page title is "Billing details and feedback".

The left sidebar shows the "Fields & Relationships" section selected, with sub-options: Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules.

The main content area is titled "Step 5. Add reference field to Page Layouts" (Step 5 of 6).

Field details:  
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

Buttons at the bottom: Previous, Next, Cancel.

Screenshot of the Salesforce Object Manager - Billing details and feedback setup page.

The page title is "Billing details and feedback".

The left sidebar shows the "Fields & Relationships" section selected, with sub-options: Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules.

The main content area is titled "Step 6. Add custom related lists" (Step 6 of 6).

Field details:  
Field Label: Service records  
Data Type: Lookup  
Field Name: Service\_records  
Description:

Specify the title that the related list will have in all of the layouts associated with the parent.  
Related List Label: Billing details and feedback

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  
 Service records Layout  
 Append related list to users' existing personal customizations

Buttons at the bottom: Previous, Save & New, Save, Cancel.

The screenshot shows the Salesforce Object Manager Fields & Relationships page for the 'Billing details and feedback' object. The left sidebar is titled 'Fields & Relationships' and lists various setup options. The main content area displays a table of fields:

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

This screenshot is identical to the one above, showing the same Fields & Relationships page for the 'Billing details and feedback' object. The left sidebar and the table of fields are exactly the same.

# Creation of Checkbox Fields

The screenshot shows the Salesforce Setup interface. The left sidebar is titled 'Fields & Relationships' under 'Object Manager'. The main content area is titled 'Service record Custom Field Quality Check Status'. The 'Custom Field Definition Detail' section shows the following details:

Field Label	Quality Check Status	Object Name	Service record
Field Name	Quality_Check_Status	Data Type	Checkbox
API Name	Quality_Check_Status__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Vedika Koravi 17/12/2024, 4:04 pm	Modified By	Vedika Koravi 17/12/2024, 4:04 pm
General Options	Default Value: Unchecked	Activate Windows Go to Settings to activate Windows.	

The screenshot shows the Salesforce Setup interface. The left sidebar is titled 'Fields & Relationships' under 'Object Manager'. The main content area is titled 'Appointment Custom Field Repairs'. The 'Custom Field Definition Detail' section shows the following details:

Field Label	Repairs	Object Name	Appointment
Field Name	Repairs	Data Type	Checkbox
API Name	Repairs__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Vedika Koravi 17/12/2024, 4:01 pm	Modified By	Vedika Koravi 17/12/2024, 4:01 pm
General Options	Default Value: Unchecked	Activate Windows Validation Rules Help Go to Settings to activate Windows.	
Field Dependencies	New	Field Dependencies Help	
No dependencies defined.			
Validation Rules	New	Validation Rules Help	
No validation rules defined.			

Screenshot of the Salesforce Setup interface showing the creation of a custom field named "Maintenance service" for the "Appointment" object.

**Custom Field Definition Detail:**

Field Information	Value	Object Name	Data Type
Field Label	Maintenance service	Appointment	Checkbox
Field Name	Maintenance_Service		
API Name	Maintenance_Service_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Vedika Korayi, 17/12/2024, 3:59 pm	Modified By	Vedika Korayi, 17/12/2024, 3:59 pm

**General Options:** Default Value: Unchecked

**Field Dependencies:** No dependencies defined.

**Validation Rules:** No validation rules defined.

**Help for this Page:** Go to Settings to activate Windows.

Screenshot of the Salesforce Setup interface showing the creation of a custom field named "Replacement Parts" for the "Appointment" object.

**Custom Field Definition Detail:**

Field Information	Value	Object Name	Data Type
Field Label	Replacement Parts	Appointment	Checkbox
Field Name	Replacement_Parts		
API Name	Replacement_Parts_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	Vedika Korayi, 17/12/2024, 4:02 pm	Modified By	Vedika Korayi, 17/12/2024, 4:02 pm

**General Options:** Default Value: Unchecked

**Field Dependencies:** No dependencies defined.

**Validation Rules:** No validation rules defined.

**Help for this Page:** Go to Settings to activate Windows.

# Creation of date Fields

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. Under the 'Appointment' object, the 'Fields & Relationships' tab is active. On the left, a sidebar lists various setup categories like Details, Page Layouts, Lightning Record Pages, etc. The main pane displays a list of field types with their descriptions:

- External Lookup Relationship**: 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.
- 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** (selected): Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
- Date/Time**: Allows users to enter a date 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.

The screenshot shows the 'New Custom Field' creation wizard, Step 2 of 4. The 'Fields & Relationships' tab is selected in the sidebar. The main form is titled 'Step 2. Enter the details'.

**Field Label:** Appointment Date

**Field Name:** Appointment\_Date

**Description:** (empty)

**Help Text:** (empty)

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

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

**Default Value:** Show Formula Editor

Use formula syntax: Enclose text and picklist value API names in double quotes ('the\_label'), include numbers without quotes (:25), show percentages as decimal (.01), and express date/calculations in the standard format (Today) + 7. To reference a field from a Custom Metadata type record use :CcustomMetadataType\_\_recordName\_\_Field\_\_c

# Creation of Currency Fields

The screenshot shows the Salesforce Setup Object Manager interface. A custom field named "Service Amount" is being created for the "Appointment" object. The field is defined as a currency type with a length of 18 and no decimal places. It has a validation rule link and a help text of "Help Text". The field is owned by "Vedika Koravu".

**Custom Field Definition Detail**

Field Information	Value
Field Label	Service Amount
Field Name	Service_Amount
API Name	Service_Amount_c
Description	Help Text
Data Owner	Vedika Koravu
Field Usage	Standard
Data Sensitivity Level	Normal
Compliance Categorization	None
Created By	Vedika Koravu, 17/12/2024, 4:08 pm
Modified By	Vedika Koravu, 17/12/2024, 4:08 pm

**Currency Options**

Setting	Value
Length	18
Decimal Places	0

**Validation Rules**

No validation rules defined.

The screenshot shows the Salesforce Setup Object Manager interface. A custom field named "Payment Paid" is being created for the "Billing details and feedback" object. The field is defined as a lookup type related to the "Service record" object. It has a validation rule link and a help text of "Help Text". The field is owned by "Vedika Koravu".

**Custom Field Definition Detail**

Field Information	Value
Field Label	Payment Paid
Field Name	Payment_Paid
API Name	Payment_Paid_c
Description	Help Text
Data Owner	Vedika Koravu
Field Usage	Standard
Data Sensitivity Level	Normal
Compliance Categorization	None
Created By	Vedika Koravu, 18/12/2024, 1:38 pm
Modified By	Vedika Koravu, 18/12/2024, 1:41 pm

**Lookup Options**

Setting	Value
Related To	Service record
Related List Label	Billing details and feedback (Payment Paid)
Required	<input checked="" type="checkbox"/>

What to do if the lookup record is deleted? Clear the value of this field.

**Validation Rules**

No validation rules defined.

## Creation of Text Fields

The screenshot displays two screenshots of the Salesforce Object Manager interface.

**Screenshot 1: Object Manager Home**

This screenshot shows the Object Manager home page with a list of objects. The columns are labeled: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The objects listed are:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Appointment	Appointment_c	Custom Object		17/12/2024	✓
Appointment Category	AppointmentCategory	Standard Object			
Appointment invitation	AppointmentInvitation	Standard Object			
Appointment invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Service Appointment	ServiceAppointment	Standard Object			
Service Appointment Attendee	ServiceAppointmentAttendee	Standard Object			

**Screenshot 2: Appointment Object Details**

This screenshot shows the details for the Appointment object. The left sidebar lists various configuration options: 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, Object Access, Triggers, and Flow Triggers. The main pane displays the following details for the Appointment object:

Details	Value
Description	
API Name	Appointment_c
Custom	✓
Singular Label	Appointment
Plural Label	Appointments
Enable Reports	✓
Track Activities	
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

Screenshot of the Salesforce Object Manager showing the 'Fields & Relationships' section for the 'Appointment' object.

**Fields & Relationships**

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment	Appointment__c	Lookup(Appointment)		✓
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		
Service Amount	Service_Amount__c	Currency(18, 0)		

Screenshot of the Salesforce Object Manager showing the 'Fields & Relationships' section for the 'Appointment' object, specifically focusing on the 'Text' field type.

**Fields & Relationships**

**External Lookup Relationship**

- The membership 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 pop-up list. The master object is the source of the values in the list.

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

**Text Field Type Description**

- Allows users to select a True (checked) or False (unchecked) value.
- Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
- Allows users to enter a date or time or pick a date from a pop-up calendar.
- Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
- Allows users to define locations, includes latitude and longitude components, and can be used to calculate distance.
- Allows users to enter any number. Leading zeros are removed.
- Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
- Allows users to enter any phone number. Automatically formats it as a phone number.
- Allows users to select a value from a list you define.
- Allows users to select multiple values from a list you define.
- Allows users to enter any combination of letters and numbers.
- Allows users to enter up to 255 characters on separate lines.
- Allows users to enter up to 131,072 characters on separate lines.
- Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
- Allows users to enter any combination of letters and numbers and store them in encrypted form.
- Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:00:000" are all valid times for this field.
- Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

Inbox - vedikaskoravi@gmail.com | Student - Skill Wallet | Appointment | Salesforce

dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS000002l0z/FieldsAndRelationships/new

Setup Home Object Manager

Search Setup

Help for this Page

**Appointment**

**New Custom Field**

**Step 2. Enter the details**

Field Label: Vehicle number plate

Length: 10

Field Name: Vehicle\_number\_plate

Description:

Help Text:

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

Unique:  Do not allow duplicate values

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

Default Value: Show Formula Editor

Step 2 of 4 Previous Next Cancel

Inbox - vedikaskoravi@gmail.com | Student - Skill Wallet | Appointment | Salesforce

dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS000002l0z/FieldsAndRelationships/new

Setup Home Object Manager

Search Setup

Help for this Page

**Appointment**

**New Custom Field**

**Step 3. Establish field-level security**

Field Label: Vehicle number plate

Data Type: Text

Field Name: Vehicle\_number\_plate

Description:

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

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
B2B Reordering Portal Buyer Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Login User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Plus Login User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Plus User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Step 3 of 4 Previous Next Cancel

Screenshot of the Salesforce Object Manager - Appointment page showing the creation of a new custom field.

**Appointment New Custom Field**

**Step 4. Add to page layouts**

Field Label: Vehicle number plate  
 Data Type: Text  
 Field Name: Vehicle\_number\_plate  
 Description:

Add Field Page Layout Name:  Appointment Layout

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

Help for this Page

Previous Save & New Save Cancel Step 4 of 4

Screenshot of the Salesforce Object Manager - Appointment page showing the list of fields.

**Fields & Relationships**

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment	Appointment_c	Lookup(Appointment)		✓
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		✓
Service Amount	Service_Amount__c	Currency(18, 0)		✓
Vehicle number plate	Vehicle_number_plate__c	Text(10) (Unique Case Insensitive)		✓

Quick Find New Deleted Fields Field Dependencies Set History Tracking

The screenshot shows the Salesforce Object Manager home page. At the top, there are tabs for Setup, Home, and Object Manager. The main area displays a table with one row:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Billing details and feedback	Billing_details_and_feedback__c	Custom Object		17/12/2024	✓

The screenshot shows the Details view for the 'Billing details and feedback' object. On the left is a sidebar with various configuration options: 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, Object Access, Triggers, and Flow Triggers. The main pane displays the 'Details' tab with the following fields:

Description	Enable Reports
API Name Billing_details_and_feedback__c	✓
Custom	Track Activities
Singular Label Billing details and feedback	Track Field History
Plural Label Billing details and feedback	Deployment Status
	Help Settings
	Standard salesforce.com Help Window

Screenshot of the Salesforce Object Manager - Billing details and feedback page.

**Fields & Relationships**

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Billing details and feedback	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Payment Paid	Payment_Paid__c	Currency(18, 0)		
Service records	Service_records__c	Lookup(Service records)		✓

Screenshot of the Salesforce Object Manager - Billing details and feedback page, showing the Fields & Relationships section.

**Fields & Relationships**

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

Each field type has a detailed description below it.

**Inbox - vedikaskoravi@gmail.com** | **Student - Skill Wallet** | **Billing details and feedback | S**

dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020m1t/FieldsAndRelationships/new

Setup Home Object Manager

Search Setup

**Billing details and feedback**

**New Custom Field**

**Step 2. Enter the details**

Help for this Page

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

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

**Default Value:** Show Formula Editor

Use formula editor. Browse text and picklist value API names in double quotes ("The text"), include numbers without quotes ("123") and use the ampersand (&) character to combine formulas. To reference a field from a Custom Metadata type record use: \$CustomMetadataType\_\_RecordName.Field\_\_c

Previous Next Cancel

**Inbox - vedikaskoravi@gmail.com** | **Student - Skill Wallet** | **Billing details and feedback | S**

dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020m1t/FieldsAndRelationships/new

Setup Home Object Manager

Search Setup

**Billing details and feedback**

**New Custom Field**

**Step 3. Establish field-level security**

Help for this Page

Previous Next Cancel

**Field Label:** Rating for service

**Data Type:** Text

**Field Name:** Rating\_for\_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 Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input type="checkbox"/>
B2B Ordering Portal Buyer Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Login User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Plus Login User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community Plus User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Customer Community User	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Previous Next Cancel

Inbox - vedikaskoravi@gmail.com | Student - Skill Wallet | Billing details and feedback | S

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 Scoping Rules Object Access Triggers Flow Triggers

Billing details and feedback New Custom Field Step 4. Add to page layouts Step 4 of 4

Add Field Page Layout Name  Billing details and feedback Layout

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.

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

Previous Save & New Save Cancel

Inbox - vedikaskoravi@gmail.com | Student - Skill Wallet | Billing details and feedback | S

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 Scoping Rules Object Access Triggers Flow Triggers

Fields & Relationships 7 items. Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Billing details and feedback	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User Group)	✓	
Payment Paid	Payment_Paid__c	Currency(18, 0)		
Rating for service	Rating_for_service__c	Text(1)		
Service records	Service_records__c	Lookup(Service records)		✓

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Type here to search Watchlist ideas 4:09 PM 12/16/2024

# Creation of Picklist Fields

The screenshot shows the Salesforce Object Manager interface. At the top, there are tabs for 'Object Manager' and 'Service records'. Below the tabs, there is a search bar labeled 'Search Setup'. The main area displays a table with columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. One row is visible for the object 'Service records'.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Service records	Service_records__c	Custom Object		17/12/2024	✓

The screenshot shows the 'Fields & Relationships' section of the 'Service records' object. On the left, there is a sidebar with various setup options like Details, Fields & Relationships, Page Layouts, etc. The main table lists fields such as 'Created By', 'Last Modified By', 'Owner', 'Quality Check Status', and 'Service records Name'. The 'Quality Check Status' field is highlighted.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Quality Check Status	Quality_Check_Status__c	Checkbox		
Service records Name	Name	Auto Number		✓

The screenshot shows the Salesforce Setup interface under the Object Manager for the 'Service records' object. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled 'Fields & Relationships' and displays a list of field types:

- Formula
- Roll-Up Summary
- Lookup Relationship
- Master-Detail Relationship
- External Lookup Relationship
- Checkbox
- Currency
- Date
- Date/Time
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist** (selected)
- Picklist (Multi-select)
- Text
- Text Area
- Text Area (HTML)

Each field type has a brief description and usage notes.

The screenshot shows the creation of a new picklist field named 'Service\_Status'. The 'Fields & Relationships' tab is selected in the sidebar. The field configuration includes:

- Field Label:** Service Status
- Values:** Enter values, with each value separated by a new line. The input field contains:
  - Started
  - Completed
- Field Name:** Service\_Status
- Description:** (empty)
- Help Text:** (empty)
- 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

The status bar at the bottom indicates it's 4:14 PM on 12/16/2024.

Inbox - vedikaskoravi@gmail.com | Student - Skill Wallet | Service records | Salesforce

dkte-9b-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01INS0000020kL4/FieldsAndRelationships/new

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

Service records New Custom Field Step 3 of 4

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	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Marketing Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Sales Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom: Support Profile	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Help for this Page

4:14 PM 28°C Sunny 12/16/2024

Inbox - vedikaskoravi@gmail.com | Student - Skill Wallet | Service records | Salesforce

dkte-9b-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01INS0000020kL4/FieldsAndRelationships/new

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

Service records New Custom Field Step 4 of 4

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.

Previous Save & New Save Cancel

Help for this Page

4:14 PM 28°C Sunny 12/16/2024

Screenshot of the Salesforce Object Manager interface for the "Service records" object.

The left sidebar shows the following navigation items:

- Details
- Fields & Relationships** (selected)
- 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 main content area displays the "Fields & Relationships" section with the following table:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Quality Check Status	Quality_Check_Status__c	Checkbox		
Service records Name	Name	Auto Number		✓
Service Status	Service_Status__c	Picklist		

Screenshot of the Salesforce Object Manager interface for the "Object Manager" object.

The left sidebar shows the following navigation items:

- Setup
- Home
- Object Manager

The main content area displays the "Object Manager" section with the following table:

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Billing details and feedback	Billing_details_and_feedback__c	Custom Object		17/12/2024	✓

The screenshot shows the Salesforce Object Manager Fields & Relationships page. The left sidebar is titled 'Fields & Relationships' and lists various layout types. The main area is titled 'Fields & Relationships' and displays a table of fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Billing details and feedback	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
Payment Paid	Payment_Paid__c	Currency(18, 0)		
Rating for service	Rating_for_service__c	Text(1)		
Service records	Service_records__c	Lookup(Service records)		✓

The screenshot shows the Salesforce Object Manager Fields & Relationships new page. The left sidebar is titled 'Fields & Relationships'. The right pane displays a list of field types with their descriptions:

- External Lookup Relationship: The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list. 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 calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
- DateTime: Allows users to enter a date and time, or pick a date from a pop-up 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 151,072 characters on separate lines.
- Text Area (Rich): Allows users to enter formatted text, add images and links. Up to 151,072 characters on separate lines.
- Text (Encrypted): Allows users to enter any combination of letters and numbers and store them in encrypted form.

Screenshot of the Salesforce Object Manager - Billing details and feedback setup page.

**Step 2. Enter the details**

Field Label: Payment Status

Values:

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

Pending  
Completed

Field Name: Payment\_Status

Description:

Screenshot of the Salesforce Object Manager - Billing details and feedback setup page.

**Step 3. Establish field-level security**

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

**Billing details and feedback**

**Step 4. Add to page layouts**

**Field Label:** Payment Status  
**Data Type:** Picklist  
**Field Name:** Payment\_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  
 Billing details and feedback Layout

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

**Step 4 of 4**

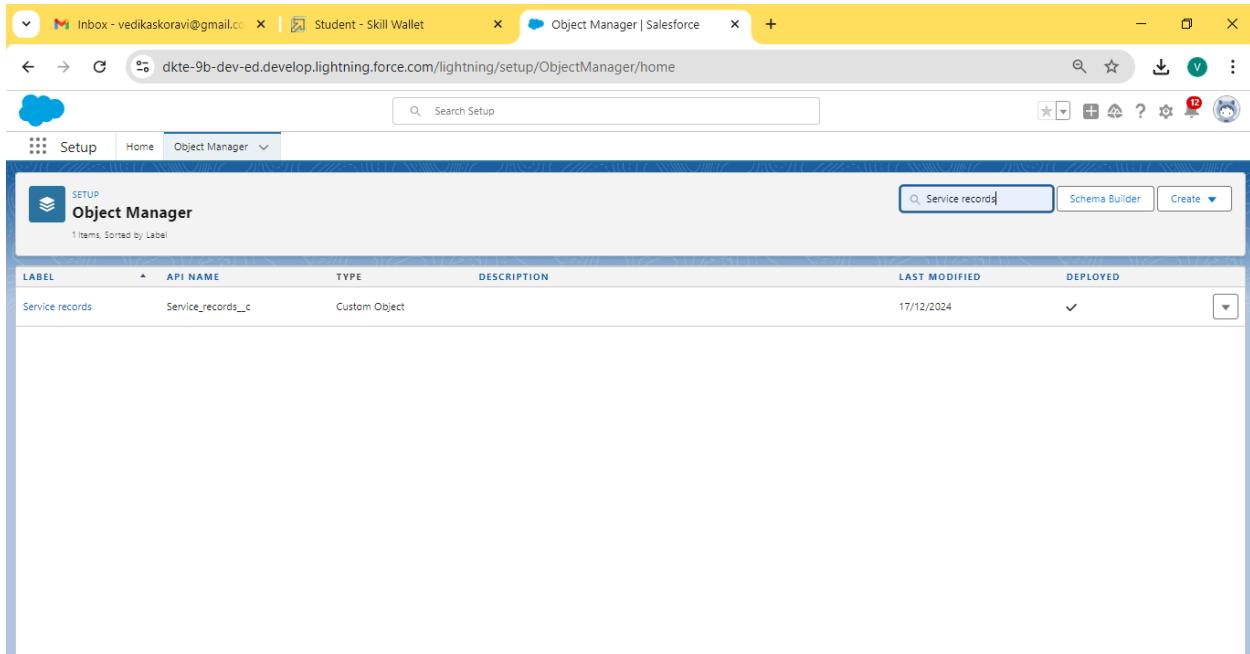
Previous Save & New Save Cancel

**Billing details and feedback**

**Fields & Relationships**

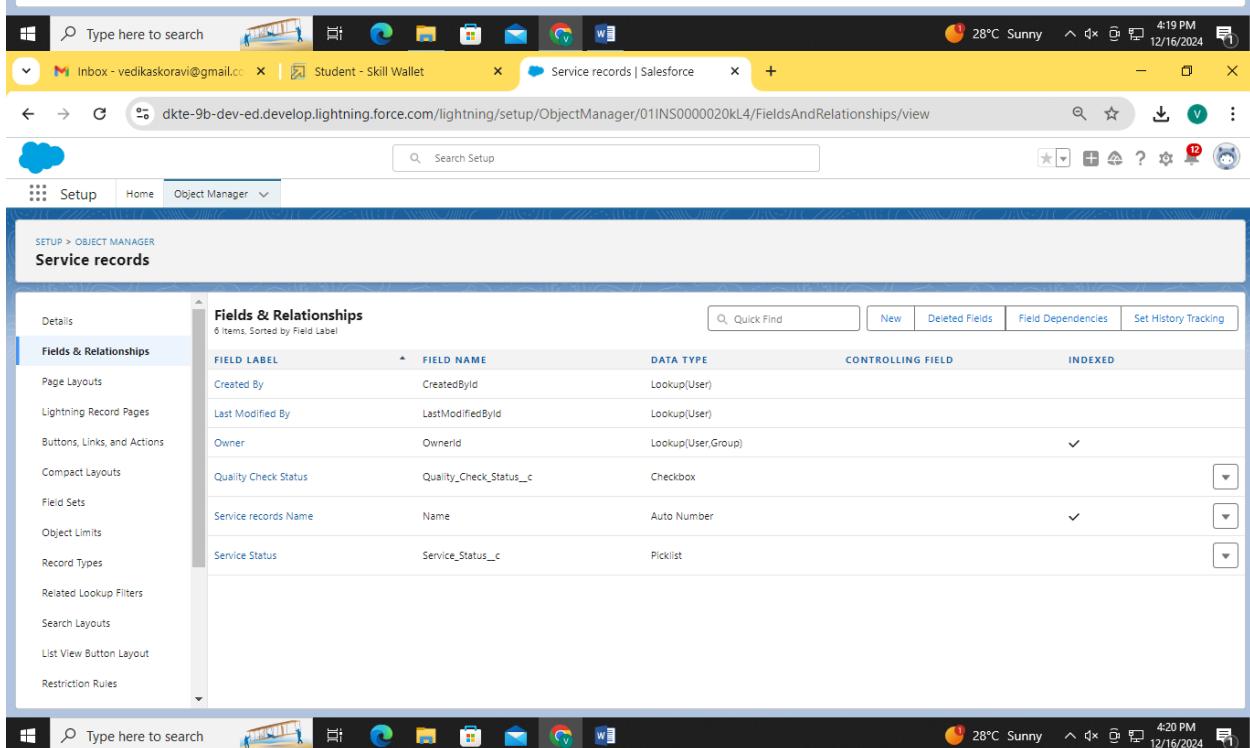
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Billing details and feedback	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		✓
Last Modified By	LastModifiedById	Lookup(User)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Payment Paid	Payment_Paid__c	Currency(18, 0)		✓
Payment Status	Payment_Status__c	Picklist		✓
Rating for service	Rating_for_service__c	Text(1)		✓
Service records	Service_records__c	Lookup(Service records)		✓

# Creating Formula Field in Service records Object



The screenshot shows the Salesforce Object Manager interface. A new object named "Service records" has been created, which is a Custom Object. The object details are as follows:

Label	API Name	Type	Description	Last Modified	Deployed
Service records	Service_records__c	Custom Object		17/12/2024	✓

The screenshot shows the "Fields & Relationships" section for the "Service records" object. It lists six fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		✓
Last Modified By	LastModifiedById	Lookup(User)		✓
Owner	OwnerId	Lookup(User,Group)		✓
Quality Check Status	Quality_Check_Status__c	Checkbox		✓
Service records Name	Name	Auto Number		✓
Service Status	Service_Status__c	Picklist		✓

Screenshot of the Salesforce Setup Object Manager for Service records. The left sidebar shows navigation options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The main panel is titled 'Service records New Custom Field' and is on 'Step 1. Choose the field type'. It asks to specify the type of information the custom field will contain. Under 'Data Type', 'Formula' is selected. Other options include None Selected, Auto Number, Roll-Up Summary, Lookup Relationship, and Master-Detail Relationship. A detailed description of each type is provided.

Screenshot of the Salesforce Setup Object Manager for Service records. The left sidebar shows navigation options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The main panel is titled 'Service records New Custom Field' and is on 'Step 2 of 5. Choose output type'. It asks to choose a formula return type. 'Date' is selected. Other options include None Selected, Checkbox, Currency, DateTime, Number, and Percent. A detailed description of each type is provided. The 'Field Label' is set to 'service date' and the 'Field Name' is set to 'service\_date'. A checkbox 'Add this field to existing custom report types that contain this entity' is checked.

The screenshot shows the Salesforce Object Manager interface for creating a new field. The left sidebar is titled 'Fields & Relationships' under 'Service records'. The main area has an 'Insert Field' button at the top left. A formula editor window is open, showing the formula `service date (Date) = CreatedDate`. To the right of the editor is a 'Functions' dropdown menu with various mathematical and string functions listed. At the bottom of the editor is a 'Check Syntax' button with a note: 'No syntax errors in merge fields or functions. (Compiled size: 20 characters)'. The status bar at the bottom indicates it's step 1 of 5.

This screenshot continues from the previous one, showing the next step in the field creation process. The title bar now says 'New Custom Field'. The main area is titled 'Step 4. Establish field-level security' and shows the configuration for the 'service\_date' field. It lists profiles and their access levels: Analytics Cloud Integration User, Analytics Cloud Security User, Contract Manager, Cross Org Data Proxy User, Custom: Marketing Profile, Custom: Sales Profile, and Custom: Support Profile. All profiles have 'Visible' checked and 'Read-Only' checked. The status bar at the bottom indicates it's step 4 of 5.

Screenshot of the Salesforce Setup interface showing the creation of a new custom field named "Service date".

**Service records New Custom Field**

**Step 5. Add to page layouts** (Step 5 of 5)

Field Label	service date
Data Type	Formula
Field Name	service_date
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.

Help for this Page

Previous Save & New Save Cancel

Screenshot of the Salesforce Setup interface showing the "Fields & Relationships" section for the "Service records" object.

**Fields & Relationships**

7 items. Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Quality Check Status	Quality_Check_Status__c	Checkbox		
service date	service_date__c	Formula (Date)		
Service records Name	Name	Auto Number		✓
Service Status	Service_Status__c	Picklist		

Quick Find New Deleted Fields Field Dependencies Set History Tracking

# Validation rule

## To create a validation rule to an Appointment Object

The screenshot shows two consecutive screenshots of the Salesforce setup interface.

**Screenshot 1: Object Manager**

The top navigation bar shows tabs for 'Inbox - vedikaskoravi@gmail.com', 'Student - Skill Wallet', and 'Object Manager | Salesforce'. The main content area is titled 'Object Manager' under 'SETUP'. It displays a list of objects with columns for Label, API Name, Type, Description, Last Modified, and Deployed. The 'Appointment' object is selected, showing its details: API Name 'Appointment\_\_c', Type 'Custom Object', Last Modified '17/12/2024', and Deployed status indicated by a checkmark icon.

Label	API Name	Type	Description	Last Modified	Deployed
Account	Account	Standard Object			
Activity	Activity	Standard Object			
Address	Address	Standard Object			
Alternative Payment Method	AlternativePaymentMethod	Standard Object			
API Anomaly Event Store	ApAnomalyEventStore	Standard Object			
Appointment	Appointment__c	Custom Object		17/12/2024	✓
Appointment Category	AppointmentCategory	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Asset	Asset	Standard Object			
Asset Action	AssetAction	Standard Object			

**Screenshot 2: Validation Rules for Appointment**

The top navigation bar shows tabs for 'Inbox - vedikaskoravi@gmail.com', 'Student - Skill Wallet', and 'Appointment | Salesforce'. The main content area is titled 'Appointment' under 'SETUP > OBJECT MANAGER'. On the left, a sidebar lists various configuration options: 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, and Restriction Rules. The right panel is titled 'Validation Rules' and shows a table with columns for Rule Name, Error Location, Error Message, Active, and Modified By. A message at the bottom states 'No items to display.'

Screenshot of the Salesforce Setup interface showing the Validation Rule configuration for the Appointment object.

**Validation Rule Edit**

**Rule Name:** Vehicle

**Description:** (empty)

**Error Condition Formula:**

```
NOT(REGEX( Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))
```

**Functions:**

- All Function Categories -
- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

**Quick Tips:**

- Operators & Functions

**Help for this Page**

F = Required Information

Screenshot of the Salesforce Setup interface showing the Validation Rule configuration for the Appointment object, with the Error Message section added.

**Error Message**

**Example:** Discount\_percent\_c>30

This message will appear when Error Condition formula is true

**Error Message:** Please enter valid number

**Functions:**

- All Function Categories -
- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

**Help on this function**

**Check Syntax:** No errors found

**Save** **Save & New** **Cancel**

The screenshot shows the Salesforce Object Manager interface. A validation rule named "Vehicle" has been created for the "Vehicle" object. The rule checks if the "Vehicle\_number\_plate\_\_c" field does not contain a valid vehicle number plate format (NOT(REGEX(Vehicle\_number\_plate\_\_c, "[A-Z]{2}(0-9){2}[A-Z]{2}(0-9){4}"))). The error message is "Please enter valid number". The rule is active and was created by Vedika Koravi on 17/12/2024, 4:44 pm.

Validation Rule Detail
Rule Name: Vehicle
Error Condition Formula: NOT(REGEX(Vehicle_number_plate__c, "[A-Z]{2}(0-9){2}[A-Z]{2}(0-9){4}")))
Error Message: Please enter valid number
Description:
Created By: Vedika Koravi, 17/12/2024, 4:44 pm
Active: ✓
Error Location: Vehicle number plate
Modified By: Vedika Koravi, 17/12/2024, 4:44 pm

## To create a validation rule to an Billing details and feedback Object

The screenshot shows the Salesforce Object Manager interface displaying a list of objects. The "Billing details and feedback" object is listed as a custom object. Other standard objects listed include Asset State Period, Assigned Resource, Associated Location, Async Operation Tracker, Authorization Form, Authorization Form Consent, Authorization Form Data Use, Authorization Form Text, Business Brand, Buyer Group, Calculation Procedure, Calculation Procedure Step, and Calculation Procedure Variable.

Object	Type	Created Date
Billing_details_and_feedback__c	Custom Object	17/12/2024
Asset State Period	Standard Object	
Assigned Resource	Standard Object	
Associated Location	Standard Object	
Async Operation Tracker	Standard Object	
Authorization Form	Standard Object	
Authorization Form Consent	Standard Object	
Authorization Form Data Use	Standard Object	
Authorization Form Text	Standard Object	
Business Brand	Standard Object	
Buyer Group	Standard Object	
Calculation Procedure	Standard Object	
Calculation Procedure Step	Standard Object	
Calculation Procedure Variable	Standard Object	

Screenshot of the Salesforce Setup interface showing the Object Manager section for the "Billing details and feedback" object.

The left sidebar lists various setup categories:

- 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
- Chart Areas

The main content area shows the "Validation Rules" list:

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

A "New" button is located in the top right corner of the Validation Rules list.

The browser address bar shows the URL: `dkte-9b-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01INS0000020m1t/ValidationRules/new`.

The bottom of the screen shows the Windows taskbar with the Start button, a search bar, and several pinned icons (File Explorer, Edge, File Cabinet, Mail, Google Sheets, Google Slides). The system tray shows the date (12/16/2024), time (4:36 PM), temperature (28°C), and weather (Sunny).

**Billing details and feedback**

**Validation Rule Detail**

Rule Name	rating_should_be_less_than_5	Active	✓
Error Condition Formula	NOT( REGEX( Rating_for_service__c , "[1-5][1]" ))	Error Location	Rating for service
Error Message	rating should be from 1 to 5	Description	
Created By	Vedika Koravi 17/12/2024, 4:47 pm	Modified By	Vedika Koravi 17/12/2024, 4:47 pm

## Duplicate rule

To create a matching rule to an Customer details Object

The screenshot shows the Salesforce Matching Rules page. The URL is <https://dkte-9b-dev-ed.lightning.force.com/lightning/setup/MatchingRules/home>. The page title is "Matching Rules". It displays a table of "All Matching Rules" with columns: Action, Rule Name, Object, Status, Description, Last Modified Date, and Last Modified By. The table contains three rows, all of which are "Deactivate" actions for standard matching rules: "Standard Account Matching Rule" (Account, Active), "Standard Contact Matching Rule" (Contact, Active), and "Standard Lead Matching Rule" (Lead, Active). All three were modified on 17/12/2024 by VKora.

Action	Rule Name	Object	Status	Description	Last Modified Date	Last Modified By
Deactivate	Standard Account Matching Rule	Account	Active	Matching rule for account records. <a href="#">More info</a>	17/12/2024	VKora
Deactivate	Standard Contact Matching Rule	Contact	Active	Matching rule for contact records. <a href="#">More info</a>	17/12/2024	VKora
Deactivate	Standard Lead Matching Rule	Lead	Active	Matching rule for lead records. <a href="#">More info</a>	17/12/2024	VKora

The screenshot shows the "New Matching Rule" wizard, Step 1: Select object. The URL is [https://dkte-9b-dev-ed.lightning.force.com/lightning/setup/MatchingRules/page?address=%2F0JD%2fe%3FretURL%3D%252F0JD](https://dkte-9b-dev-ed.lightning.force.com/lightning/setup/MatchingRules/page?address=%2F0JD%2Fe%3FretURL%3D%252F0JD). The page title is "Matching Rules". The sub-page title is "New Matching Rule". The step title is "Step 1: Select object". It asks "Select the object to which this matching rule applies." A dropdown menu is open, showing "Customer Details" selected. There are "Next" and "Cancel" buttons at the bottom right.

The screenshot shows the Salesforce Setup interface for creating a new Matching Rule. The page title is "Matching Rules | Salesforce". The left sidebar shows "Data" and "Matching Rules" selected. The main area has a "Rule Details" section with "Customer Details" as the object, "Matching customer details" as the rule name, and "Matching\_customer\_details" as the unique name. A "Description" field is empty. Below this is a "Matching Criteria" section with a table for comparing fields. The table has two rows: one for "Gmail" and one for "Phone number". Both rows have "Exact" selected as the matching method and "AND" selected for the match blank fields. The "Matching Criteria" table also includes an "Add Filter Logic" button.

The screenshot shows the Salesforce Matching Rules detail page for the rule "Matching customer details". The page title is "Matching Rules | Salesforce". The left sidebar shows "Data" and "Matching Rules" selected. The main area displays the "Matching Rule Detail" for "Matching customer details". The "Object" is "Customer Details", "Rule Name" is "Matching customer details", and "Unique Name" is "Matching\_customer\_details". The "Matching Criteria" section shows the logical expression: "(Customer\_Details: Gmail EXACT MatchBlank = FALSE) AND (Customer\_Details: Phone\_number EXACT MatchBlank = FALSE)". The status is "Inactive", and it was created by "Vedika Koravi" on 17/12/2024, 4:53 pm. It was last modified by "Vedika Koravi" on the same date and time. The bottom status bar indicates "Record low" and the date "12/16/2024".

**Matching Rule Detail**

Object: Customer Details  
Rule Name: Matching customer details  
Unique Name: Matching\_customer\_details  
Description: (Customer Details: Gmail EXACT MatchBlank = FALSE) AND (Customer Details: Phone\_number EXACT MatchBlank = FALSE)  
Matching Criteria: (Customer Details: Gmail EXACT MatchBlank = FALSE) AND (Customer Details: Phone\_number EXACT MatchBlank = FALSE)  
Status: Inactive  
Created By: Vedika Koravi, 17/12/2024, 4:53 pm  
Modified By: Vedika Koravi, 17/12/2024, 4:53 pm

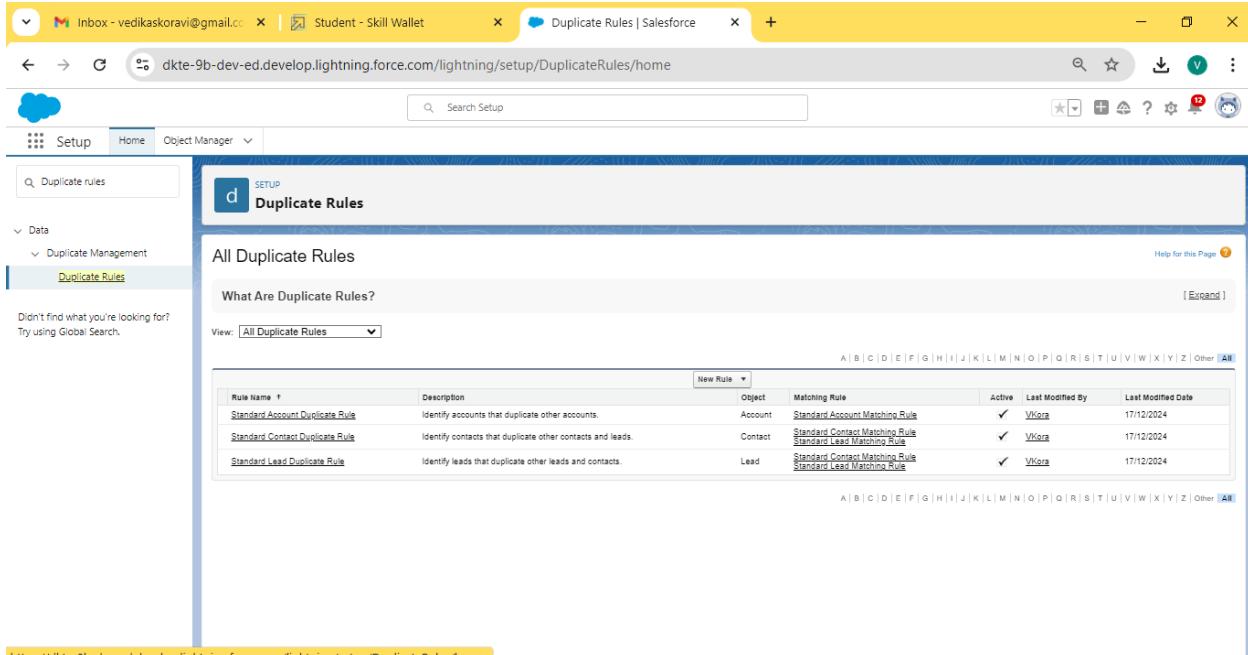
**Matching Rule Activation**

We're activating your matching rule. We'll send an email to vedikaskoravi@gmail.com when the activation process is complete.

**Matching Rule Detail**

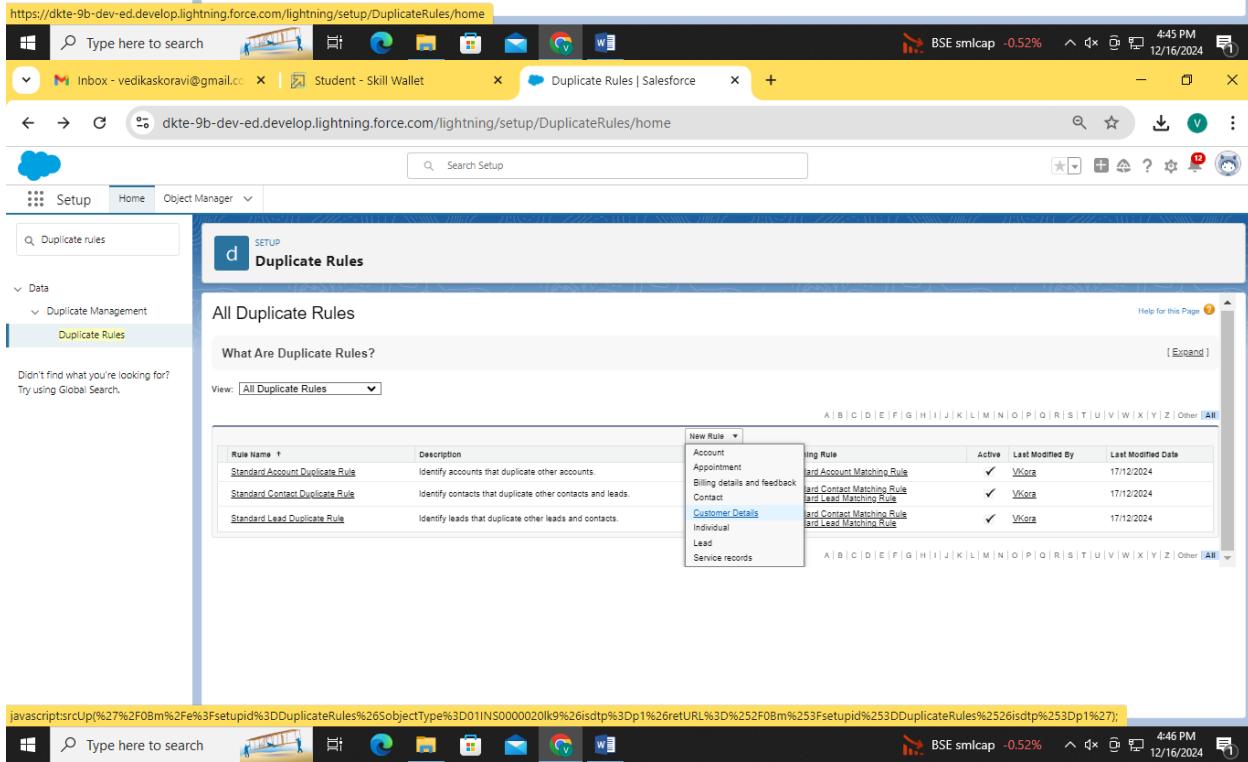
Object: Customer Details  
Rule Name: Matching customer details  
Unique Name: Matching\_customer\_details  
Description: (Customer Details: Gmail EXACT MatchBlank = FALSE) AND (Customer Details: Phone\_number EXACT MatchBlank = FALSE)  
Matching Criteria: (Customer Details: Gmail EXACT MatchBlank = FALSE) AND (Customer Details: Phone\_number EXACT MatchBlank = FALSE)  
Status: Active  
Created By: Vedika Koravi, 17/12/2024, 4:53 pm  
Modified By: Vedika Koravi, 17/12/2024, 4:53 pm

# To create a Duplicate rule to an Customer details Object



The screenshot shows the 'Duplicate Rules' page in the Salesforce Setup. The left sidebar has 'Data' expanded, with 'Duplicate Management' and 'Duplicate Rules' selected. A search bar at the top right contains 'Search Setup'. The main area title is 'All Duplicate Rules'. It includes a 'What Are Duplicate Rules?' section and a 'View' dropdown set to 'All Duplicate Rules'. Below is a table listing three standard rules:

Rule Name	Description	Object	Matching Rule	Active	Last Modified By	Last Modified Date
Standard Account Duplicate Rule	Identify accounts that duplicate other accounts.	Account	Standard Account Matching Rule	✓	Vikora	17/12/2024
Standard Contact Duplicate Rule	Identify contacts that duplicate other contacts and leads.	Contact	Standard Contact Matching Rule	✓	Vikora	17/12/2024
Standard Lead Duplicate Rule	Identify leads that duplicate other leads and contacts.	Lead	Standard Lead Matching Rule	✓	Vikora	17/12/2024



The screenshot shows the 'Duplicate Rules' page in the Salesforce Setup. The left sidebar has 'Data' expanded, with 'Duplicate Management' and 'Duplicate Rules' selected. A search bar at the top right contains 'Search Setup'. The main area title is 'All Duplicate Rules'. It includes a 'What Are Duplicate Rules?' section and a 'View' dropdown set to 'All Duplicate Rules'. Below is a table listing three standard rules. A new row is being added, indicated by a cursor in the 'Object' column:

Rule Name	Description	Object	Matching Rule	New Rule	Active	Last Modified By	Last Modified Date
Standard Account Duplicate Rule	Identify accounts that duplicate other accounts.	Account	Standard Account Matching Rule	✓	Vikora	17/12/2024	
Standard Contact Duplicate Rule	Identify contacts that duplicate other contacts and leads.	Contact	Standard Contact Matching Rule	✓	Vikora	17/12/2024	
Standard Lead Duplicate Rule	Identify leads that duplicate other leads and contacts.	Lead	Standard Lead Matching Rule	✓	Vikora	17/12/2024	
New Rule							
		Customer Details	and Account Matching Rule	✓	Vikora	17/12/2024	
			and Contact Matching Rule	✓	Vikora	17/12/2024	
			and Lead Matching Rule	✓	Vikora	17/12/2024	

Screenshot of the Salesforce Duplicate Rules setup page.

The page title is "Duplicate Rules | Salesforce".

The URL is "dkte-9b-dev-ed.lightning.force.com/lightning/setup/DuplicateRules/page?address=%2F0Bm%2Fe%3Fsetupid%3DDuplicateRules%26S...".

The page header includes "Inbox - vedikaskoravi@gmail.com", "Student - Skill Wallet", and a search bar.

The main content area shows the "Customer Detail duplicate" rule configuration:

- Duplicate Rule Edit**:
  - Rule Name: Customer Detail duplicate
  - Description: (Customer Details: Gmail EXACT MatchBlank = FALSE) AND (Customer Details: Phone\_number EXACT MatchBlank = FALSE)
  - Object: Customer Details
  - Record-Level Security:
    - Enforce sharing rules (selected)
    - Bypass sharing rules
- Actions**:
  - Action On Create: Allow (selected), Alert (selected), Report
  - Action On Edit: Allow (selected), Alert (unchecked), Report
  - Alert Text: Use one of these records?
- Matching Rules**:
  - Compare Customer Details With: Customer Details
  - Matching Rule: Matching customer details (selected)
  - Matching Criteria: (Customer Details: Gmail EXACT MatchBlank = FALSE) AND (Customer Details: Phone\_number EXACT MatchBlank = FALSE)
  - Field Mapping: Mapped (selected)

The bottom section displays the "Customer Detail duplicate" rule details:

Duplicate Rule Detail		Operations On Create	Operations On Edit
Rule Name	Customer Detail duplicate	✓ Alert ✓ Report	Alert Report
Description			
Object	Customer Details		
Record-Level Security	Enforce sharing rules		
Action On Create	Allow		
Action On Edit	Allow		
Alert Text	Use one of these records?		
Matching Rule	Matching customer details (Mapped)		
Conditions			
Created By	Vedika Koravi, 17/12/2024, 4:58 pm		
Modified By	Vedika Koravi, 17/12/2024, 4:58 pm		

Inbox - vedikaskoravi@gmail.com | Student - Skill Wallet | Duplicate Rules | Salesforce

dkte-9b-dev-ed.lightning.force.com/lightning/setup/DuplicateRules/page?address=%2F0BmNS000003HrCf%3Fsetupid%3DDuplicateRu...

Setup Home Object Manager Search Setup

Duplicate rules

**Duplicate Rules**

Customer Details Duplicate Rule Customer Detail duplicate

Customer Detail duplicate

Duplicate Rule Detail

	Rule Name	Description	Action On Create	Action On Edit	Operations On Create	Operations On Edit
Rule Name	Customer Detail duplicate	Description	Object	Customer Details	Record-Level Security	Enforce sharing rules
Action On Create	Allow	Action On Edit	Allow	Action Text	Use one of these records?	Alert
Conditions	Matching Rule	Active	Matching Rule	Matching customer details	Matching Criteria	Matching Criteria
Created By	Vedika Koravi	17/12/2024, 4:58 pm	Modified By	Vedika Koravi	17/12/2024, 4:58 pm	Modified By

Help for this Page

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

1 of 1 | Reorder

4:47 PM 12/16/2024

# Profiles

## Manager Profile

The screenshot shows two views of the Salesforce Profiles page. The top view displays a list of existing profiles, including Standard User, Manager, and various system profiles like Analytics Cloud Integration User and Authenticated Website. The bottom view shows a 'Clone Profile' dialog where a new profile named 'Manager' is being created, cloning the 'Standard User' profile.

**Profiles Page (Top Screenshot):**

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/>	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/>	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/>	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/>	External App Login	External App Login	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/>	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/>	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/>	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Cross Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/>	Custom Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Custom Sales Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Custom Support Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Customer Community Login User	Customer Community Login	<input type="checkbox"/>
<input type="checkbox"/>	Customer Community Plus Login User	Customer Community Plus Login	<input type="checkbox"/>
<input type="checkbox"/>	Customer Community User	Customer Community Plus	<input type="checkbox"/>
<input type="checkbox"/>	Customer Community User	Customer Community	<input type="checkbox"/>
<input type="checkbox"/>	Customer Portal Manager Custom	Customer Portal Manager Custom	<input type="checkbox"/>
<input type="checkbox"/>	Customer Portal Manager Standard	Customer Portal Manager Standard	<input type="checkbox"/>

**Clone Profile Dialog (Bottom Screenshot):**

You must select an existing profile to clone from.

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

Save Cancel

The screenshot shows the Salesforce Setup interface with the following details:

- Profile Edit Manager**: The current screen is the "Profile Edit Manager" for the "Manager" profile.
- Name**: Manager
- User License**: Salesforce
- Description**: (Empty)
- Custom Profile**: Checked
- Custom App Settings**: A grid of application settings with "Visible" and "Default" checkboxes.

	Visible	Default		Visible	Default	
All Tabs (standard__AllTab Set)	<input checked="" type="checkbox"/>	<input type="radio"/>		Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>		Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>		Sales (standard__Sales)	<input type="checkbox"/>	<input checked="" type="radio"/>
Automation (standard__FlowsApp)	<input checked="" type="checkbox"/>	<input type="radio"/>		Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>		Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>
Business Rules Engine (standard__ExpressionSetConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>		Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>	<input type="radio"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="radio"/>		Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="radio"/>

This screenshot is identical to the one above, showing the "Profile Edit Manager" screen for the "Manager" profile with the same configuration and application settings.

Inbox - vedikaskoravi@gmail.com | Student - Skill Wallet | Profiles | Salesforce

Search Setup

Setup Home Object Manager

Profiles

Inventory Reservations

Invoices Work types

Work Type Groups

Custom Object Permissions

	Read	Create	Edit	Delete	View All	Data Administration	Modify All
Appointments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>				
Billing details and feedback	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>				

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
Obfuscate secret answer for password resets:	<input type="checkbox"/>

Inbox - vedikaskoravi@gmail.com | Student - Skill Wallet | Profiles | Salesforce

Search Setup

Setup Home Object Manager

Profiles

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.

Logon 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

Name	Manager	Custom Profile
User License	Salesforce	<input checked="" type="checkbox"/>
Description		
Created By	Vedika Koravi, 17/12/2024, 5:03 pm	Modified By: Vedika Koravi, 17/12/2024, 5:04 pm

Page Layouts

Standard Object Layouts	Global	Invoice
Email Application	Global Layout [View Assignment]	Invoice Layout [View Assignment]
Home Page Layout	Not Assigned [View Assignment]	Invoice Line Layout [View Assignment]
Account	DE Default [View Assignment]	Lead Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Legal Entity Layout [View Assignment]
Opportunity Insights	Opportunity Insights Layout [View Assignment]	Location Layout [View Assignment]

## sales person Profile

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. A search bar at the top right contains the text 'Search Setup'. The left sidebar has 'Users' expanded, with 'Profiles' selected. The main content area is titled 'Clone Profile' and displays a form to clone an existing profile. The 'Existing Profile' dropdown is set to 'Standard Platform User'. The 'User License' is listed as 'Salesforce Platform' and the 'Profile Name' is 'sales person'. Below the form are 'Save' and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The left sidebar has 'Users' expanded, with 'Profiles' selected. The main content area is titled 'sales person' and displays the profile details. The 'Name' is 'sales person', 'User License' is 'Salesforce Platform', and 'Created By' is 'Vedika Koravi, 17/12/2024, 5:17 pm'. The 'Modified By' field also shows 'Vedika Koravi, 17/12/2024, 5:17 pm'. Below this, the 'Page Layouts' section shows standard object layouts for various objects like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, Fulfillment Order Item Tax, Fulfillment Order Product, Idea, Individual, and Invoice. Each layout is associated with a specific view assignment.

The screenshot shows two consecutive screenshots of the Salesforce Setup interface, likely from a Windows desktop environment.

**Profile Edit (Top Screenshot):**

- Name:** sales person
- User License:** Salesforce Platform
- Description:** (Empty)
- Custom Profile:**
- Custom App Settings:** Shows visibility and default settings for various apps. *Garage Management Application (Garage\_Management\_Application)* is set as the default for its category.
- Service Provider Access:** Shows tab settings where  Overwrite users' personal tab customizations is unchecked.

**Custom Object Permissions (Bottom Screenshot):**

- Custom Object Permissions:** Shows permissions for Appointments, Billing details and feedback, Customer Details, and Service records.
- Session Settings:** Session Times Out After: 2 hours of inactivity; Session Security Level Required at Login: None.
- Password Policies:** Includes fields for User passwords expire in (90 days), 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, and Require a minimum 1 day password lifetime.

The screenshot shows the Salesforce Setup interface for managing profiles. The top navigation bar includes tabs for Home, Object Manager, and Setup. A search bar at the top right says "Search Setup". The main content area is titled "Profiles" with a sub-section "sales person". It displays a summary of the profile's permissions and details. Below the summary, there are sections for "Page Layouts" and "Standard Object Layouts", each listing various global and specific layouts assigned to the profile.

Profile sales person

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

Profile Detail

Name	sales person	Action
User License	Salesforce Platform	Custom Profile <input checked="" type="checkbox"/>
Description	Vedika Koravu	Created By <a href="#">Vedika Koravu</a> , 17/12/2024, 5:17 pm
		Modified By <a href="#">Vedika Koravu</a> , 17/12/2024, 5:21 pm

Page Layouts

Standard Object Layouts	Global	Layout	Action	Global	Layout	Action
Email Application	Not Assigned	[View Assignment]		Fulfillment Order Item Tax	Fulfillment Order Item Tax Layout	[View Assignment]
Home Page Layout	Home Page Default	[View Assignment]		Fulfillment Order Product	Fulfillment Order Product Layout	[View Assignment]
Account	Alternative Layout	[View Assignment]		Idea	Ideas by Record Type	[View Assignment]
Alternative Payment Method	Alternative Payment Method Layout	[View Assignment]		Individual	Individual Layout	[View Assignment]
Opportunity Invitation	Opportunity Invitation Layout	[View Assignment]		Invoice	Invoices Layout	[View Assignment]
				Inviting Link	Inviting Link Layout	[View Assignment]

# Role & Role Hierarchy

## Creating Manager Role

The screenshot shows the Salesforce Setup interface with the 'Roles' page open. On the left, there's a sidebar with 'Users' expanded, showing 'Sales' and 'Service' sections. The main content area is titled 'Understanding Roles' and contains a 'Sample Role Hierarchy'. The hierarchy diagram shows:

- Executive Staff**: CEO, President, CFO, VR Sales. Description: \* 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 Wt. Sales. Description: \* View & edit data, roll up forecasts & generate reports for all users directly below \* Can't access data of users above or at same level.
- Eastern Sales Director**: Director of E. Sales. Description: \* View & edit data, roll up forecasts & generate reports for all users directly below \* Can't access data of users above or at same level.
- International Sales Director**: Director of Int'l Sales. Description: \* 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. Description: \* View & edit data, roll up forecasts & generate reports for own data only \* Can't access data of users above or at same level.
- Eastern Sales Rep**: NY Sales Rep, MA Sales Rep. Description: \* View & edit data, roll up forecasts & generate reports for own data only \* Can't access data of users above or at same level.
- International Sales Rep**: Asian Sales Rep, European Sales Rep. Description: \* View & edit data, roll up forecasts & generate reports for own data only \* Can't access data of users above or at same level.

At the bottom right of the main content area are 'Set Up Roles' and 'Don't show this page again' buttons.

The screenshot shows the 'Role Edit New Role' page. The sidebar on the left is identical to the previous one. The main content area is titled 'Role Edit New Role' and contains a 'Role Edit' form:

Label	Manager
Role Name	Manager
This role reports to	DKTE
Role Name as displayed on reports	Manager

At the bottom of the form are 'Save', 'Save & New', and 'Cancel' buttons.

The screenshot shows the Salesforce Setup interface for managing Roles. The left sidebar is collapsed, and the main area displays the 'Manager' role details. The 'Role Detail' section includes fields for Label (Manager), Role Name (Manager), This role reports to (None), Modified By (Vedika Koravu, 17/12/2024, 5:24 pm), Opportunity Access (Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities), Case Access (Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases), and Role Name as displayed on reports (Manager). Below this, the 'Users in Manager Role' section shows no records displayed. The top navigation bar includes tabs for Setup, Home, Object Manager, and a search bar.

## Creating another roles

The screenshot shows the Salesforce Setup interface for creating a new role. The left sidebar is collapsed, and the main area displays the 'New Role' creation form. The 'Role Edit' section includes fields for Label (sales person), Role Name (sales\_person), This role reports to (Manager), and Role Name as displayed on reports (Manager). The bottom of the form has Save, Save & New, and Cancel buttons. The top navigation bar includes tabs for Setup, Home, Object Manager, and a search bar.

**Role Detail**

Label	sales person	Role Name	sales_person
This role reports to	Manager	Role Name as displayed on reports	
Modified By	Vedula.Koravu	Sharing Groups	Role and Internal Subordinates
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases		

**Users in sales person Role**

Assign Users to Role		New User	Users in sales person Role Help	
No records to display				

# Users

## Create User

**All Users**

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00dnst000008nrgj2aq.0cqocgwevzk@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	Dhangate, Ankita	ADhang	ankitabharani@doe.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	User Integration	Integ	integration@00dns000008nrgj2aq.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00dns000008nrgj2aq.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

User Detail

Niklaus Mikaelson

Name: Niklaus Mikaelson  
Alias: nmika  
Email: bhamadhegate@gmail.com [Verify] [i](#)

Username: ankitabhar@dkte.com

Nickname: nk [i](#)  
Title: [i](#)  
Company: [i](#)  
Department: [i](#)  
Division: [i](#)  
Address: [i](#)

Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)  
Locale: English (India)  
Language: English

Delegated Approver: [i](#)  
Manager: [i](#)

Receive Approval Request Emails: Only if I am an approver

Federation ID: [i](#)

Role: Manager  
User License: Salesforce Platform  
Profile: Salesperson

Active:

Marketing User:   
Offline User:   
Knowledge User:   
Flow User:   
Service Cloud User:   
Site.com Contributor User:   
Site.com Publisher User:   
WDC User:   
Mobile Push Registrations: [View](#)  
Data.com User Type: [None](#) [i](#)  
Accessibility Mode (Classic Only):  [i](#)  
Debug Mode:  [i](#)  
High-Contrast Palette on Charts:

## creating another users

New User

User Edit

General Information

First Name: Mukesh  
Last Name: Kadam  
Alias: mikada  
Email: bhamadhegate@gmail.com  
Username: mukesh@dkte.com  
Nickname: muk  
Title: [i](#)  
Company: [i](#)  
Department: [i](#)  
Division: [i](#)

Role: sales person  
User License: Salesforce Platform  
Profile: Salesperson

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](#) [i](#)  
Data.com Monthly Addition Limit: Default Limit (300) [i](#)  
Accessibility Mode (Classic Only):  [i](#)  
High-Contrast Palette on Charts:

The image displays two identical screenshots of the Salesforce Setup interface, specifically the 'Users' section under 'User Management Settings'. Both screenshots show the 'New User' page for creating a new Salesforce user.

**User Edit - General Information**

Field	Value
First Name	Tanvi
Last Name	Kore
Alias	Ikore
Email	bharmadhagate@gmail.com
Username	tanvi@dkte.com
Nickname	tanu
Title	
Company	
Department	
Division	
Role	sales person
User License	Salesforce Platform
Profile	sales person
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Data.com User Type	-None-
Data.com Monthly Addition Limit	Default Limit (300)
Accessibility Mode (Classic Only)	<input type="checkbox"/>

**User Edit - General Information**

Field	Value
First Name	Anushka
Last Name	Patil
Alias	apati
Email	bharmadhagate@gmail.com
Username	anushka@dkte.com
Nickname	anu
Title	
Company	
Department	
Division	
Role	sales person
User License	Salesforce Platform
Profile	sales person
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Data.com User Type	-None-
Data.com Monthly Addition Limit	Default Limit (300)
Accessibility Mode (Classic Only)	<input type="checkbox"/>

# Public groups

## Creating New Public Group

The screenshot shows the Salesforce Setup interface with the 'Users' section selected. A search bar at the top left contains 'user'. The main area displays the 'Public Groups' page under the 'Group Membership' section. A 'New Group' button is visible. The 'Group Information' section includes fields for 'Label' (set to 'sales team') and 'Group Name' (set to 'sales\_team'). A checkbox for 'Grant Access Using Hierarchies' is checked. Below this, there's a 'Description' field and a search bar for 'Roles'. The 'Available Members' list contains various roles like 'Customer Support, North America' and 'Salesperson'. An 'Add' button is shown between the available and selected member lists. The 'Selected Members' list currently contains one item, 'Role: sales person'. A 'Find' button is located next to the search bar.

# Sharing Setting

## Creating Sharing settings

The screenshot shows the Salesforce Setup interface with the 'Security' section selected. A search bar at the top left contains 'shar'. The main area displays the 'Sharing Settings' page. Under 'Sharing Settings', there's a table for 'Guest User Sharing Rule Access Report'. The table has three columns: 'Object' (e.g., Shipping Carrier Method, Streaming Channel, Tableau Host Mapping, Waitlist, Web Cart Document, Work Order, Work Plan, Work Plan Template, Work Step Template, Work Type, Work Type Group, Appointment, Billing details and feedback, Customer Details, Service records), 'Sharing Rule' (dropdown menus set to 'Public Read Only' or 'Private'), and 'Access' (checkboxes). Some checkboxes are checked, indicating specific sharing rules. At the bottom of the page, there are sections for 'Other Settings' and checkboxes for 'Standard Report Visibility', 'Manual User Record Sharing', 'Manager Groups', 'Secure guest user record access', and 'Require permission to view record names in lookup fields'. A 'Save' and 'Cancel' button are at the bottom right.

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup interface. The left sidebar lists various setup categories like Setup Home, Service Setup Assistant, and Administration. The main content area is titled 'Sharing Settings' and contains six steps for creating a sharing rule:

- Step 1: Rule Name**: Fields for Label ('Sharing setting'), Rule Name ('Sharing\_setting'), and Description.
- Step 2: Select your rule type**: Radio button selected for 'Based on record owner'.
- Step 3: Select which records to be shared**: dropdowns for 'Service records: owned by members of' set to 'Roles' and 'sales person'.
- Step 4: Select the users to share with**: dropdowns for 'Share with' set to 'Roles' and 'Manager'.
- Step 5: Select the level of access for the users**: dropdown for 'Access Level' set to 'ReadWrite'.

At the bottom are 'Save' and 'Cancel' buttons.

## Flows

### Create a Flow

The screenshot shows the 'Flow Builder - Select Type' screen. The left sidebar has tabs for 'Toolbox' and 'Elements' (which is selected). The main area is titled 'Select Type' and shows two sections: 'Recommended' and 'All Flow Types'.

**Recommended** section:

- Screen Flow**: Guides users through a business process launched from Lightning pages, Experience Cloud sites, quick actions, and more.
- Record-Triggered Flow** (selected): 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.
- Autolaunched Flow (No Trigger)**: Launches when invoked by Apex processes, REST API, and more. This autolaunched flow runs in the background.

**All Flow Types** section:

- Autolaunched Flow (No Trigger)**
- Autolaunched Orchestration (No Trigger)**

At the bottom are 'Back' and 'Create' buttons, and a link to 'Get more on the AppExchange'.

**Flow Builder**

**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.

**Record Triggered Flow**

**Start**

**Run immediately**

**Amount Update**  
Update Records

**End**

**Update Records**

\*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)

Field: Payment_Status__c	Operator: Equals	Value: Completed
+ Add Condition		

Set Field Values for the Billing details and feedback Record  
Field: Payment\_Paid\_\_c   Value: \$Record > Service records > Appointment > Ser...

+ Add Field

**Edit Text Template**

\*API Name: alert

Description:

\*Body:

Insert a resource... View as Plain Text

Dear{\$Record.Service\_records\_\_r.Appointment\_\_r.Customer\_Details\_\_r.Name},  
I hope this message finds you well. I wanted to take a moment to express my sincere gratitude for your recent payment for the

Cancel Done

**Flow Builder**

```

graph TD
    Start((Start)) -- "Run Immediately" --> Update[Amount Update  
Update Records]
    Update --> Email[Email Alert Action]
    Email --> End((End))
  
```

Send Email

Label: Email Alert

\*API Name: Email\_Alert

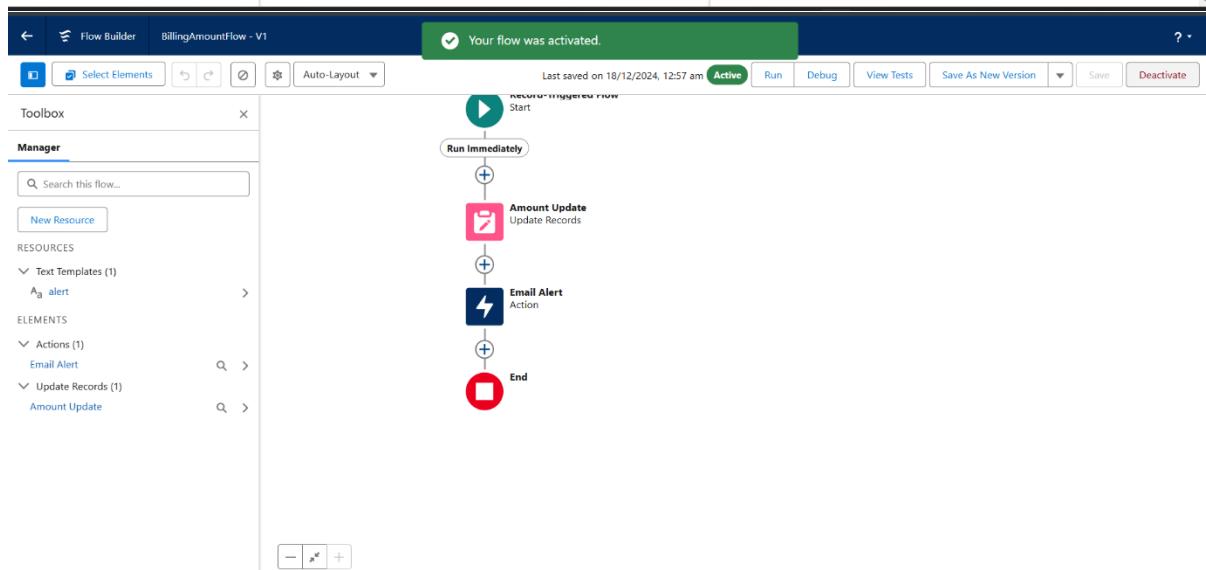
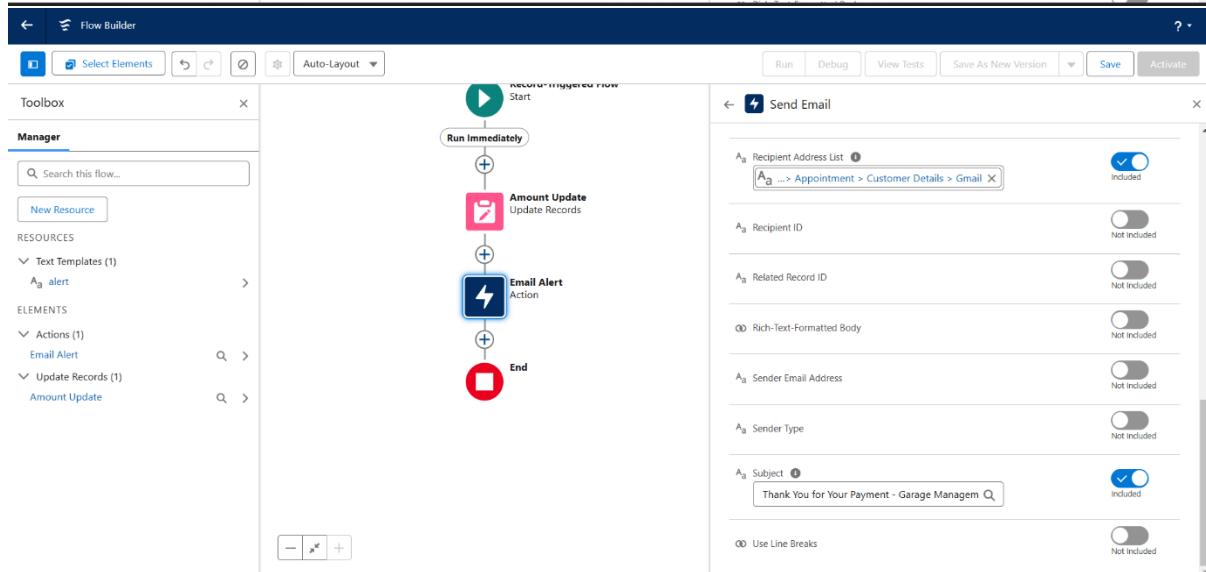
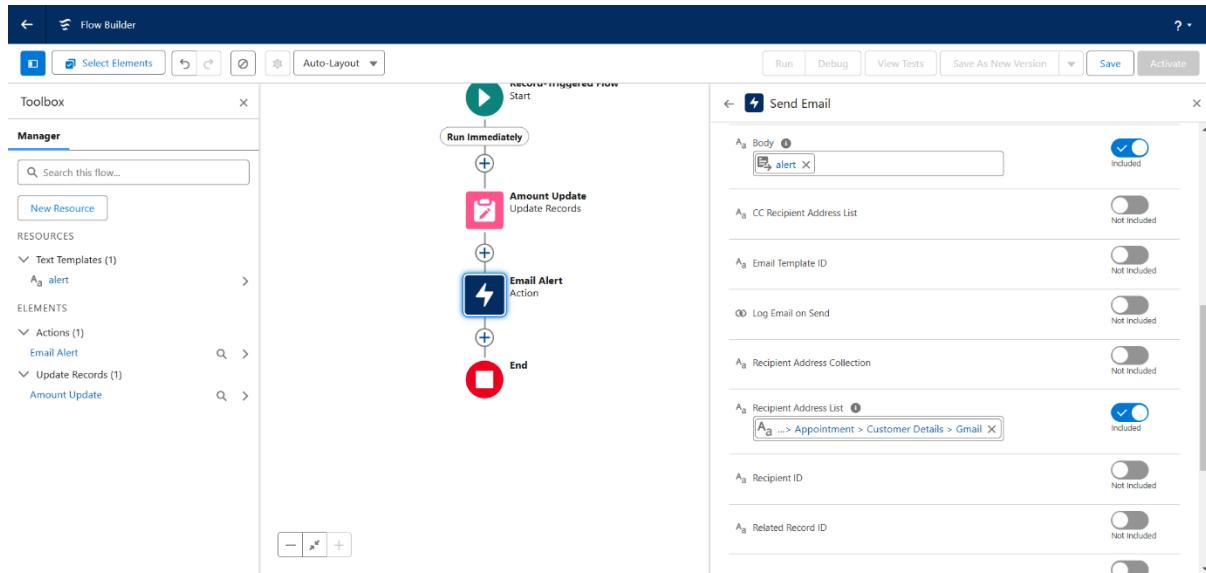
Description:

Send Email

emailSimple-emailSimple

Set Input Values for the Selected Action

- Add Threading Token to Body: Not Included
- Add Threading Token to Subject: Not Included
- BCC Recipient Address List: Not Included



# Create another Flow

**Flow Builder**

**Select Type**

**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**: **Selected**. 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**

- Autolaunched Flow (No Trigger)**
- Autolaunched Orchestration (No Trigger)**

**Create**

**Get more on the AppExchange**

**Flow Builder**

**Start Record-Triggered Flow**

**Object:** Service records    **Trigger:** A record is created or updated

**Configure Start**

or deleted.

\*Object: Service records

**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.

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

**Flow Builder**

Record-Triggered Flow

```

graph TD
    Start((Start)) --> Run[Run Immediately]
    Run --> Update[Update Records]
    Update --> End((End))
    
```

Update Records

How to Find Records to Update and Set Their Values

- Use the service records record that triggered the flow
- Update records related to the service records 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
Quality_Check_Status__c	Equals	True

+ Add Condition

Set Field Values for the Service records Record

Field	Value
Service_Status__c	Completed

+ Add Field

Flow Label: Update Service Status

Flow API Name: Update\_Service\_Status

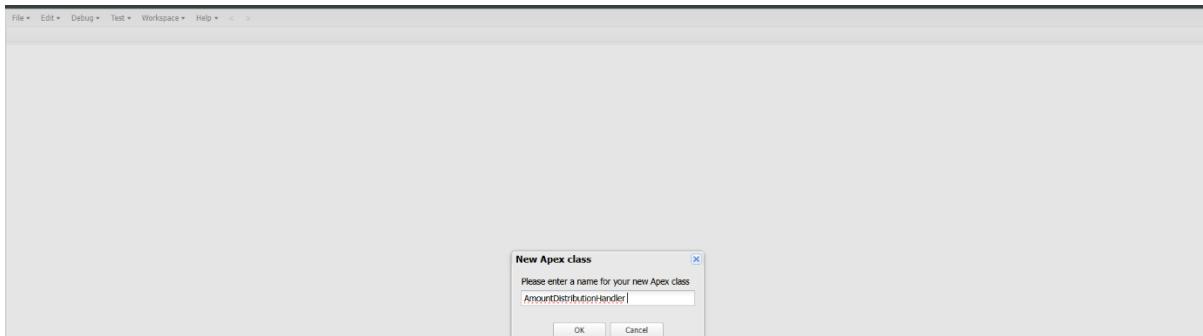
Description:

Show Advanced

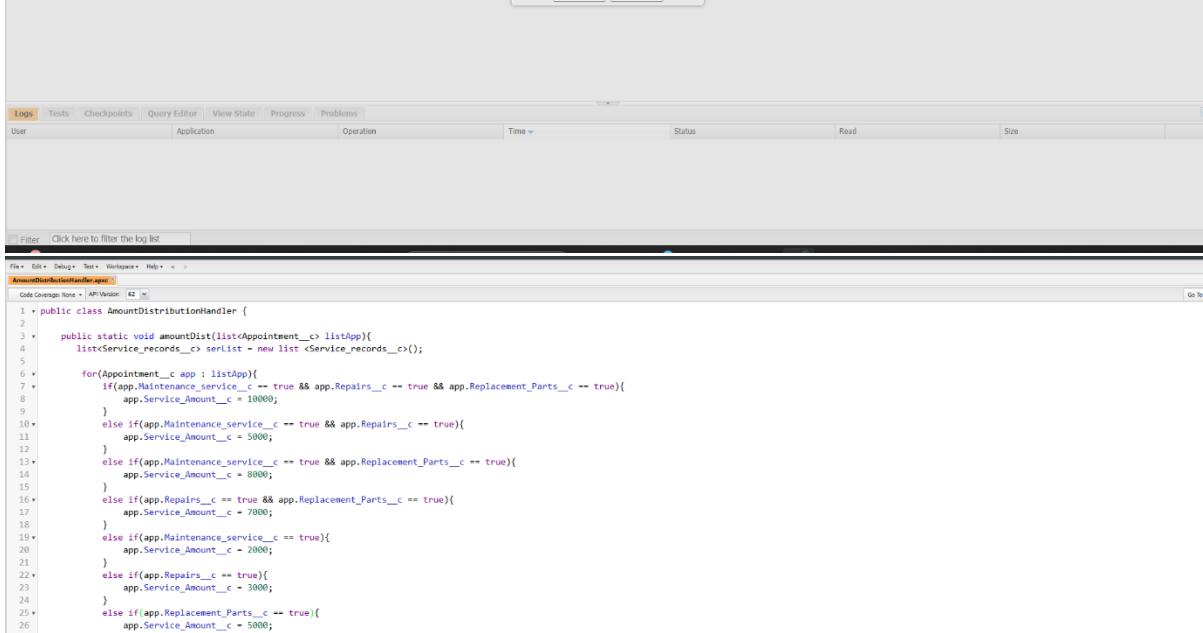
Cancel Save

# Apex Trigger

## Apex handler

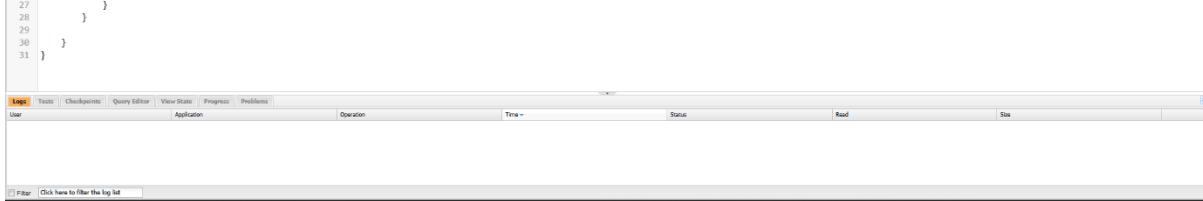


The screenshot shows the Salesforce IDE interface. A modal dialog titled "New Apex class" is open, prompting the user to enter a name for the new Apex class. The input field contains "AmountDistributionHandler". Below the input field are two buttons: "OK" and "Cancel".



The code editor displays the following Apex class:

```
1 public class AmountDistributionHandler {
2
3     public static void amountDist(list<Appointment__c> listApp){
4         list<Service_records__c> serlist = new list<Service_records__c>();
5
6         for(Appointment__c app : listApp){
7             if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){
8                 app.Service_Amount__c = 10000;
9             }
10            else if(app.Maintenance_service__c == true && app.Repairs__c == true){
11                app.Service_Amount__c = 5000;
12            }
13            else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
14                app.Service_Amount__c = 8000;
15            }
16            else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
17                app.Service_Amount__c = 7000;
18            }
19            else if(app.Maintenance_service__c == true){
20                app.Service_Amount__c = 2000;
21            }
22            else if(app.Repairs__c == true){
23                app.Service_Amount__c = 3000;
24            }
25            else if(app.Replacement_Parts__c == true){
26                app.Service_Amount__c = 5000;
27            }
28        }
29    }
30 }
```



The log list shows the following message:

```
Filter: Click here to filter the log list.
```

```
File Edit Debug Test Workspace Help
Logs Tests Checkpoints Query Editor View State Progress Problems
User Application Operation Time Status Read Size
AmountDistributionHandler.apc 42 Go To
Code Coverage None API Version 42
1 public class AmountDistributionHandler {
2
3     public static void amountDist(list<Appointment__c> listApp){
4         list<Service_records__c> serlist = new list<Service_records__c>();
5
6         for(Appointment__c app : listApp){
7             if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){
8                 app.Service_Amount__c = 10000;
9             }
10            else if(app.Maintenance_service__c == true && app.Repairs__c == true){
11                app.Service_Amount__c = 5000;
12            }
13            else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
14                app.Service_Amount__c = 8000;
15            }
16            else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
17                app.Service_Amount__c = 7000;
18            }
19            else if(app.Maintenance_service__c == true){
20                app.Service_Amount__c = 2000;
21            }
22            else if(app.Repairs__c == true){
23                app.Service_Amount__c = 3000;
24            }
25            else if(app.Replacement_Parts__c == true){
26                app.Service_Amount__c = 5000;
27            }
28        }
29    }
30 }
```

Log: Tests Checkpoints Query Editor View State Progress Problems
User Application Operation Time Status Read Size
AmountDistributionHandler.apc 42 Go To
Code Coverage None API Version 42

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

**AmountDistributionHandler.apxc**

Code Coverage: None API Version: 62 Go To

```

1 public class AmountDistributionHandler {
2
3     public static void amountDist(list<Appointment__c> listApp){
4         list<Service_records__c> serList = new list <Service_records__c>();
5
6         for(Appointment__c app : listApp){
7             if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){
8                 app.Service_Amount__c = 10000;
9             }
10            else if(app.Maintenance_service__c == true && app.Repairs__c == true){
11                app.Service_Amount__c = 5000;
12            }
13            else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
14                app.Service_Amount__c = 8000;
15            }
16            else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
17                app.Service_Amount__c = 15000;
18            }
19        }
20    }
21 }
```

Logs Tests Checkpoints Query Editor View State Progress Problems

User Application Operation Time Status

New Apex Trigger

Name: AmountDistribution  
sObject: Appointment\_\_c

Submit

Size

Filter Click here to filter the log list

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

**AmountDistributionHandler.apxc** **AmountDistribution.apxt**

Code Coverage: None API Version: 62 Go To

```

1 trigger AmountDistribution on Appointment__c (before insert, before update) {
2
3
4
5     if(trigger.isbefore && trigger.isinsert || trigger.isupdate){
6
7         AmountDistributionHandler.amountDist(trigger.new);
8
9     }
10
11 }
```

Logs Tests Checkpoints Query Editor View State Progress Problems

User Application Operation Time Status Read Size

Filter Click here to filter the log list

# Reports

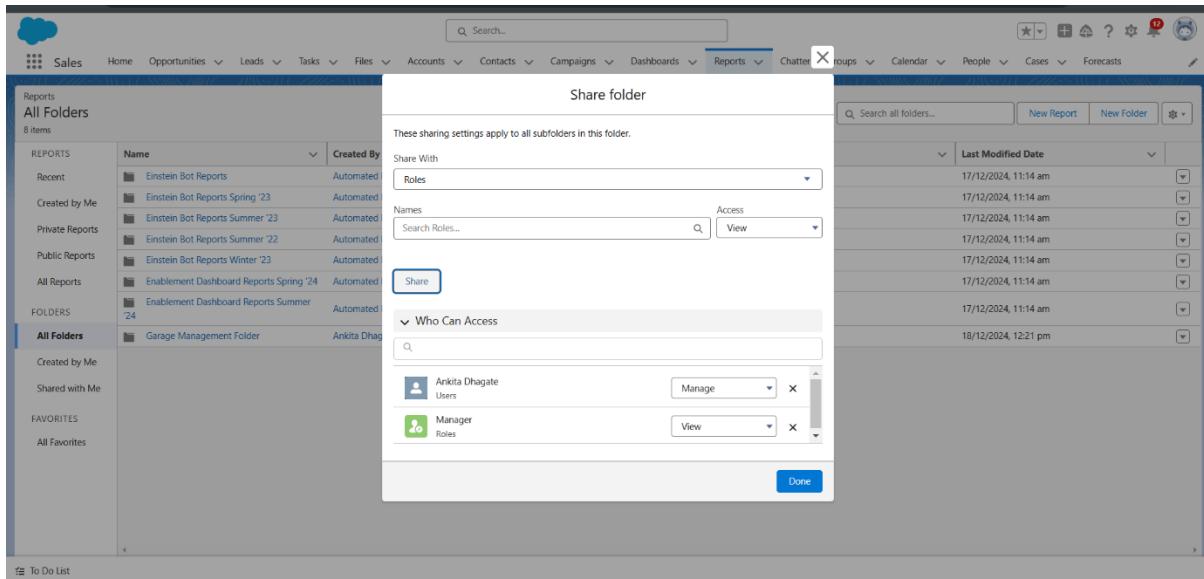
## create a report folder

The screenshot shows the Salesforce Reports interface. On the left, there's a sidebar with categories like 'Recent', 'Created by Me', 'Public Reports', etc. The main area has a search bar and buttons for 'New Report' and 'New Folder'. A modal window titled 'Create folder' is open, prompting for 'Folder Label' (set to 'Garage Management Folder') and 'Folder Unique Name' (set to 'GarageManagementFolder'). There are 'Cancel' and 'Save' buttons at the bottom of the modal.

## Sharing a report folder

The screenshot shows the 'All Folders' view in the Reports section. The sidebar includes 'All Folders' under 'FOLDERS'. In the main grid, a context menu is open over the 'Garage Management Folder', showing options: 'Favorite', 'Share' (which is highlighted), 'Rename', and 'Delete'. The grid lists various report and dashboard folders with their details like 'Name', 'Created By', 'Created On', 'Last Modified By', and 'Last Modified Date'.

Name	Created By	Created On	Last Modified By	Last Modified Date
Einstein Bot Reports	Automated Process	17/12/2024, 11:14 am	Automated Process	17/12/2024, 11:14 am
Einstein Bot Reports Spring '23	Automated Process	17/12/2024, 11:14 am	Automated Process	17/12/2024, 11:14 am
Einstein Bot Reports Summer '23	Automated Process	17/12/2024, 11:14 am	Automated Process	17/12/2024, 11:14 am
Einstein Bot Reports Summer '22	Automated Process	17/12/2024, 11:14 am	Automated Process	17/12/2024, 11:14 am
Einstein Bot Reports Winter '23	Automated Process	17/12/2024, 11:14 am	Automated Process	17/12/2024, 11:14 am
Enablement Dashboard Reports Spring '24	Automated Process	17/12/2024, 11:14 am	Automated Process	17/12/2024, 11:14 am
Enablement Dashboard Reports Summer '24	Automated Process	17/12/2024, 11:14 am	Automated Process	17/12/2024, 11:14 am
Garage Management Folder	Ankita Dhagate	18/12/2024, 12:21 pm	Ankita Dhagate	18/12/2024, 12:21 pm



## Create Report Type

**Report Types**

## Custom Report Types

**What is a Custom Report Type?**

Custom report types allow you to build a framework in the report wizard, from which users can create and customize reports. You build custom report types off of the relationships (master-detail and lookup) between objects so that you can:

- Choose which objects to display to users creating and customizing reports
- Define the relationships between objects displayed to users creating and customizing reports
- Select which object fields can be used as columns in reports

Note that the visibility of custom report types in the report wizard is controlled by users' access to the objects in the report type.

Don't show me this page again Continue

**Report Type Focus**

Specify what type of records (rows) will be the focus of reports generated by this report type.

Example: If reporting on "Contacts with Opportunities with Partners," select "Contacts" as the primary object.

Primary Object: **Customer Details**

**Identification**

Report Type Label: Service information  
Report Type Name: Service\_information

Description: 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:  Deployed

Next | 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 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.

Previous | Save | Cancel

## Create Report

### Customer Record demo

The screenshot shows a "New Customer Details" form. At the top right, there are buttons for "Import", "Change Owner", and "Assign Label". Below the title, a note says "\* = Required Information". The "Information" section contains fields for "Customer Name" (Pooja), "Phone number" (7894625130), and "Gmail" (pooja@gmail.com). To the right of the "Customer Name" field is an "Owner" section showing "Ankita Dhadate". At the bottom of the form are "Cancel", "Save & New", and "Save" buttons.

### Appointment records demo

The screenshot shows an "Information" form for an appointment. At the top right, there are buttons for "Import", "Change Owner", and "Assign Label". Below the title, a note says "\* = Required Information". The "Information" section contains fields for "Appointment Name" (Shreya), "Appointment Date" (13/12/2024), "Maintenance service" (checked), "Repairs" (checked), "Replacement Parts" (checked), "Service Amount" (₹9,000), and "Vehicle number plate" (MH01AB3355). To the right of the "Appointment Name" field is an "Owner" section showing "Ankita Dhadate". At the bottom of the form are "Cancel", "Save & New", and "Save" buttons.

## Service records demo

The screenshot shows the 'Service records' module in a CRM system. A modal window titled 'New Service records' is open, showing the 'Information' section. The 'Appointment' field is populated with 'app-009'. The 'Quality Check Status' field has a checked checkbox. The 'Service Status' field is set to 'Started'. The 'Owner' is listed as 'Ankita Dhagate'. At the bottom of the modal are 'Cancel', 'Save & New', and 'Save' buttons.

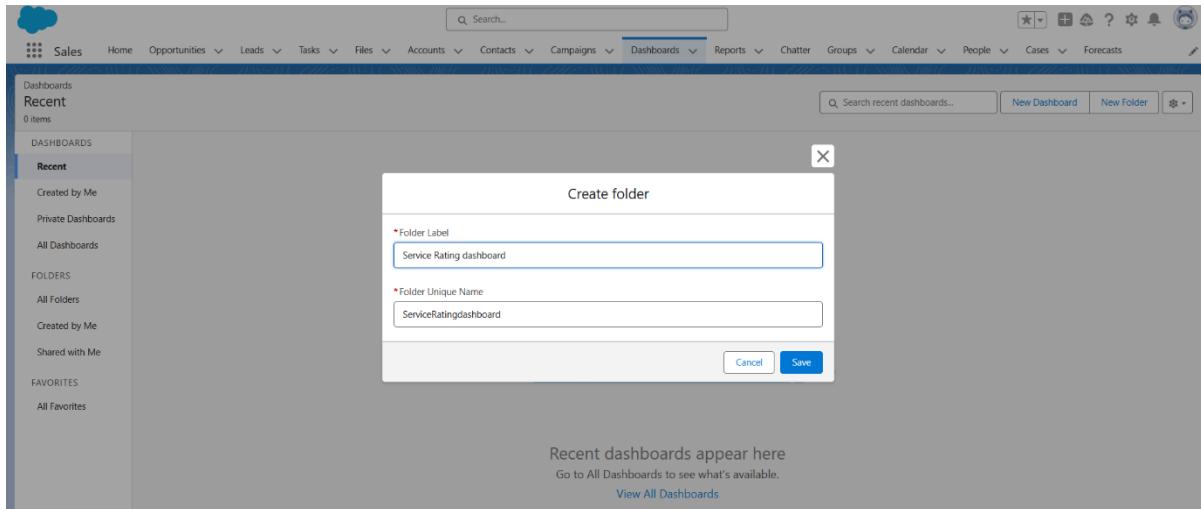
## Billing details and feedback record demo

The screenshot shows the 'Billing details and feedback' module in a CRM system. A modal window titled 'New Billing details and feedback' is open, showing the 'Information' section. The 'Service records' field is populated with 'ser-004'. The 'Payment Paid' field is populated with 'ser-004'. The 'Rating for service' field is set to '4'. The 'Payment Status' field is set to 'Pending'. The 'Owner' is listed as 'Ankita Dhagate'. At the bottom of the modal are 'Cancel', 'Save & New', and 'Save' buttons.

## Create Report

# Dashboards

## Create Dashboard Folder



The screenshot shows a Salesforce dashboard titled 'Customer Review'. The top navigation bar includes links for 'Customer Details', 'Appointments', 'Service records', 'Billing details and feedbacks', and 'Dashboards'. The main area features a chart titled 'New Service information Report' showing 'Record Count' versus 'Rating for service'. The chart has points at (2, 1), (3, 2), (4, 4), and (5, 3). A callout bubble indicates 'Payment Status: Pending'. Below the chart is a link 'View Report (New Service information Report)'. The bottom right corner of the dashboard has a message: 'Activate Windows' and 'Go to Settings to activate Windows.' The bottom of the screen shows the Windows taskbar with various icons and system status.

# Create Dashboard

Screenshot of a Salesforce Lightning interface showing an appointment record and a dashboard.

**Appointment Record:**

- Appointment Name: app-017
- Customer Details: Mac
- Appointment Date: 15/12/2024
- Appointment Type: Maintenance service (checkbox checked)
- Repairs (checkbox checked)
- Replacement Parts (checkbox unchecked)
- Service Amount: \$5,000
- Vehicle number plate: TS30EU0443
- Created By: Vedika Koravi, 18/12/2024, 4:29 pm
- Last Modified By: Vedika koravi, 18/12/2024, 4:29 pm

**Dashboard:**

The dashboard displays a chart titled "New Service information Report". The chart shows a line graph with "Rating for service" on the x-axis (values 2, 3, 4, 5) and "Record Count" on the y-axis (values 0, 1, 2, 3, 4). The data points are approximately (2, 1), (3, 2), (4, 4), and (5, 3). A callout bubble indicates "Payment Status Pending".

Activate Windows  
Go to Settings to activate Windows.

Windows Taskbar (bottom):  
Type here to search, File Explorer, Task View, Start button, Edge, Google Chrome, Mail, File Explorer, Settings, Task Manager, System tray (29°C Haze, 4:24 PM, 12/18/2024).

# User Adoption

## creating records

The screenshot shows a Salesforce Lightning interface for a record detail view. The URL in the browser is [dkte-9b-dev-ed.lightning.force.com/lightning/r/Appointment\\_\\_c/a01NS0000pqWpdYAE/view](https://dkte-9b-dev-ed.lightning.force.com/lightning/r/Appointment__c/a01NS0000pqWpdYAE/view). The page title is "Appointment app-017". The top navigation bar includes links for Garage Management, Customer Details, Appointments, Service records, Billing details and feedbacks, and Dashboards. The main content area displays the "Details" tab for the appointment record. The record contains the following fields:

Field	Value
Appointment Name	app-017
Customer Details	Mac
Appointment Date	15/12/2024
Appointment	Maintenance service, Repairs, Replacement Parts
Service Amount	\$5,000
Vehicle number plate	TS30EU0443
Created By	Vedika Koravi, 18/12/2024, 4:29 pm
Last Modified By	Vedika Koravi, 18/12/2024, 4:29 pm

On the right side of the page, there is a promotional message for Windows activation: "Activate Windows. Go to Settings to activate Windows." The status bar at the bottom right shows "100% 01:14".

