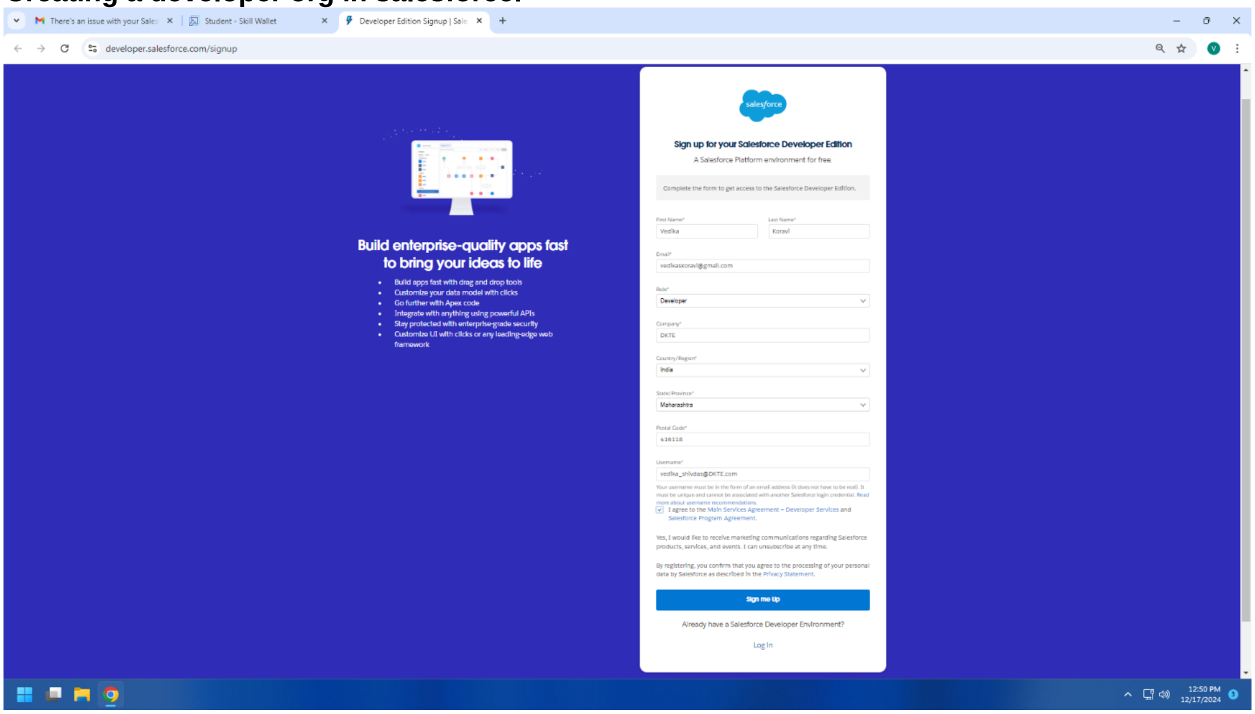
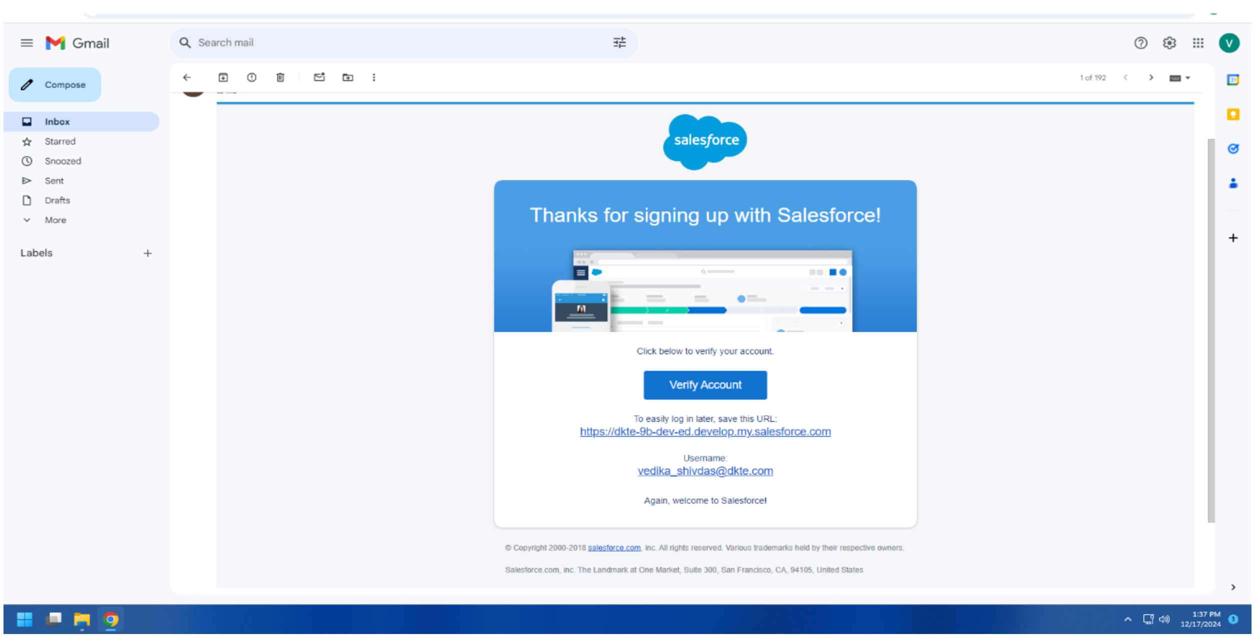
Salesforce

Creating Developer Account:

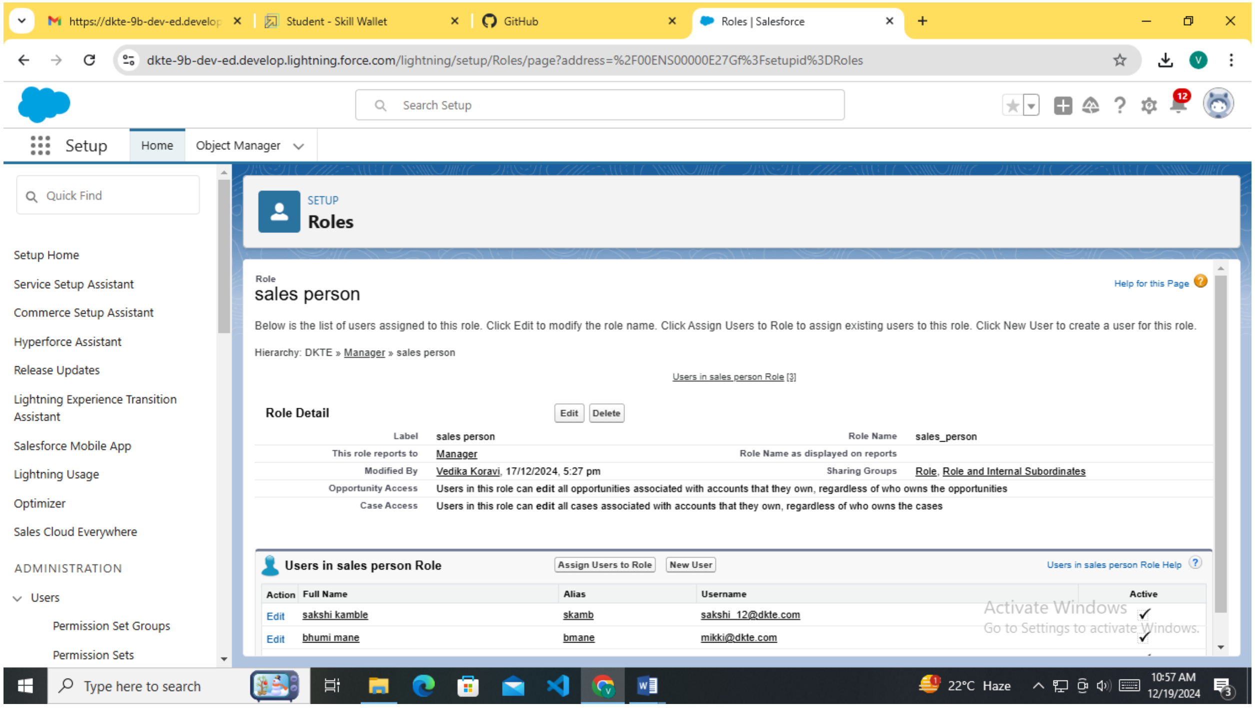
Creating a developer org in salesforce.



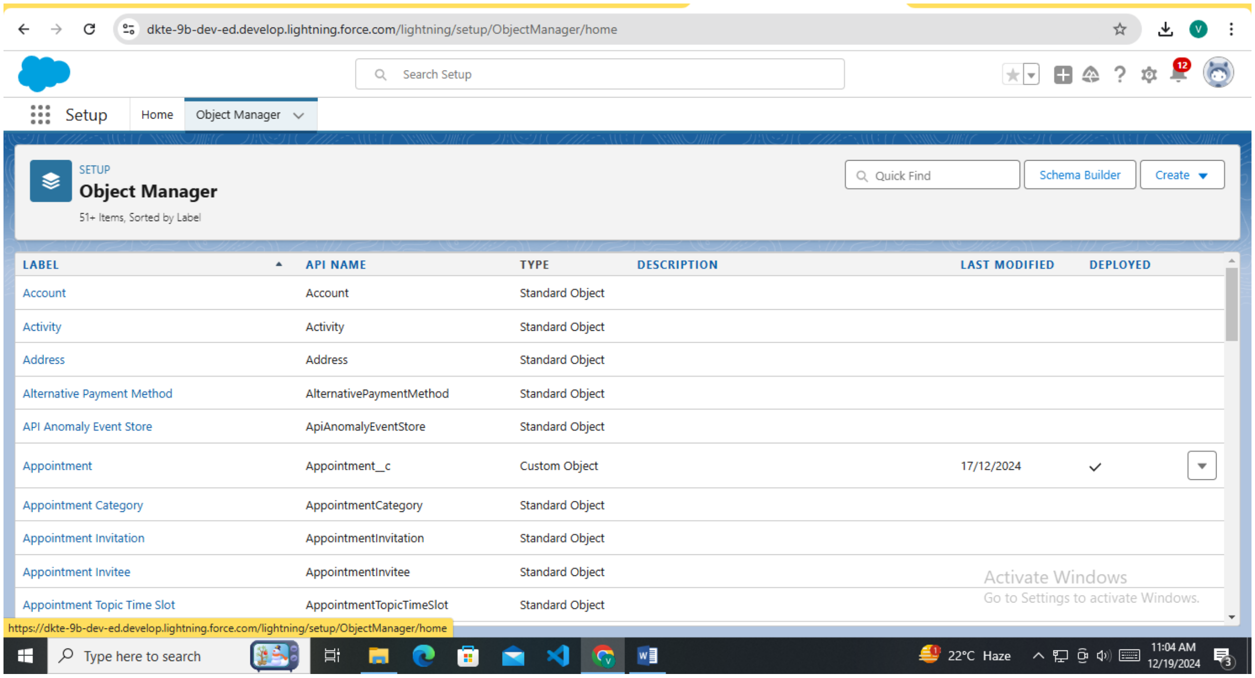
Account Activation



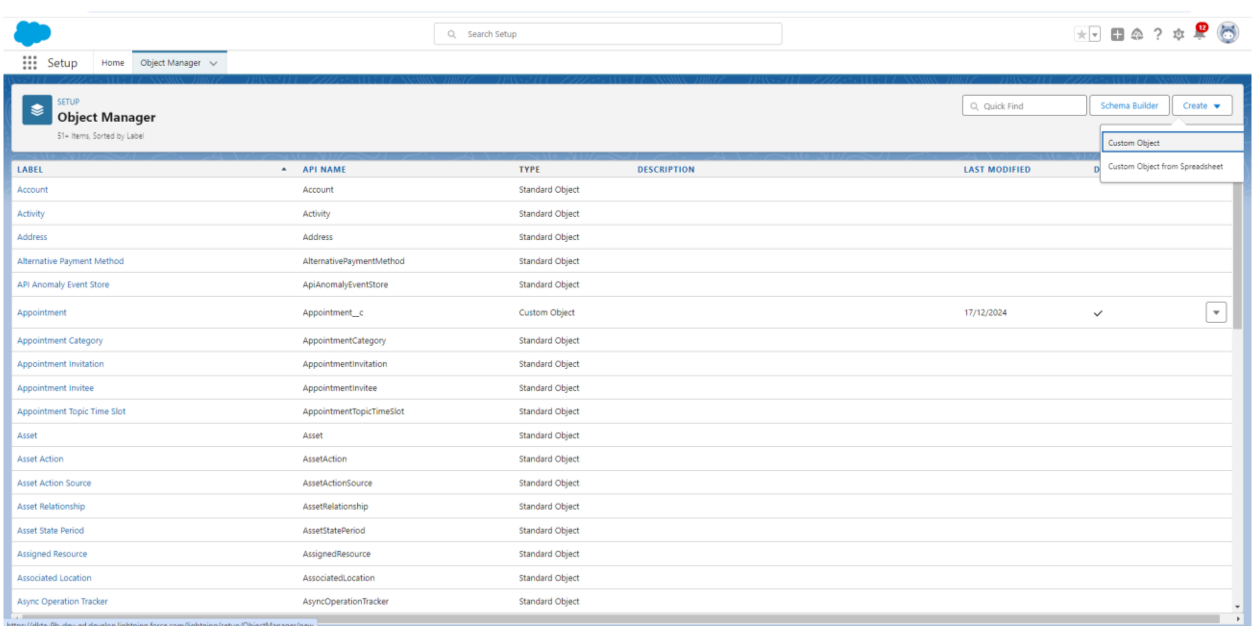
Then you will redirect to your salesforce setup page.



Object

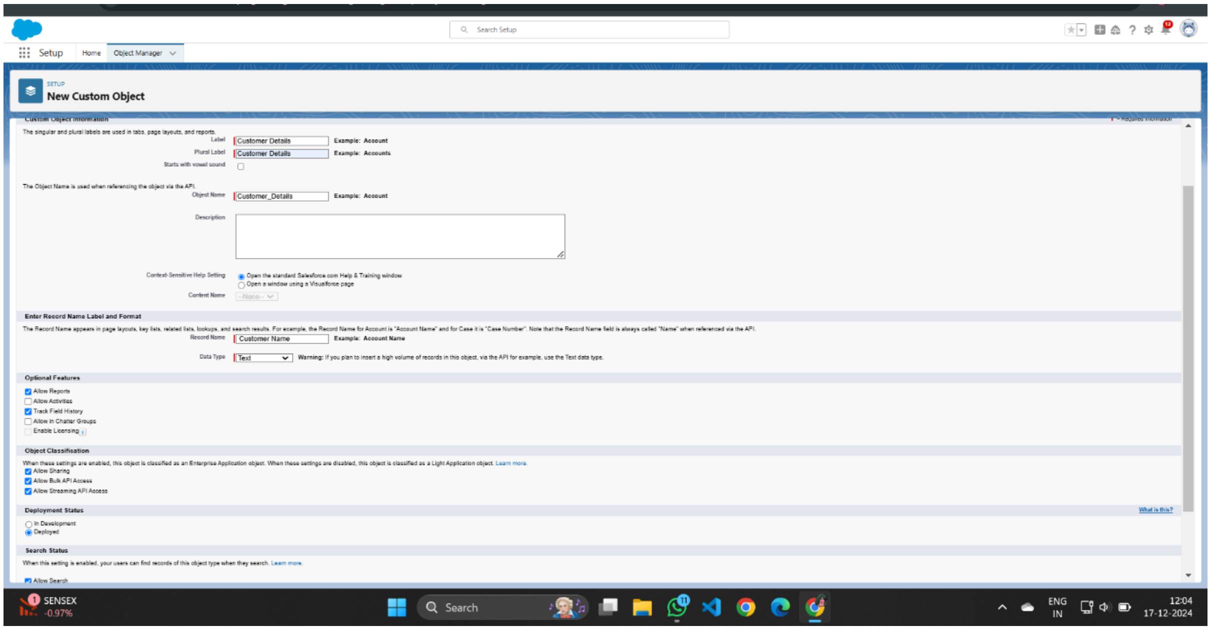


dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home
Search Setup
Setup
Home
Object Manager
SETUP
Object Manager
51+ Items, Sorted by Label
Quick Find
Schema Builder
Create
LABEL
API NAME
TYPE
DESCRIPTION
LAST MODIFIED
DEPLOYED
Account
Account
Standard Object
Activity
Activity
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.
https://dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home
Type here to search
22°C Haze
11:04 AM
12/19/2024

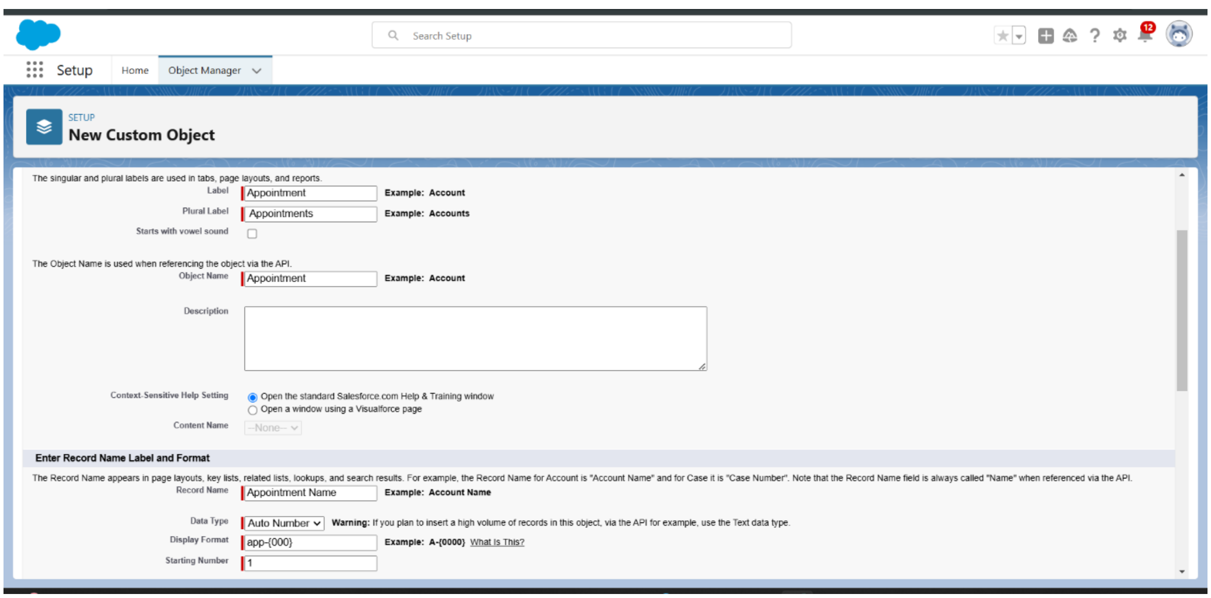


Search Setup
Setup
Home
Object Manager
SETUP
Object Manager
51+ Items, Sorted by Label
Quick Find
Schema Builder
Create
Custom Object
Custom Object from Spreadsheet
LABEL
API NAME
TYPE
DESCRIPTION
LAST MODIFIED
Account
Account
Standard Object
Activity
Activity
Standard Object
Address
Address
Standard 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

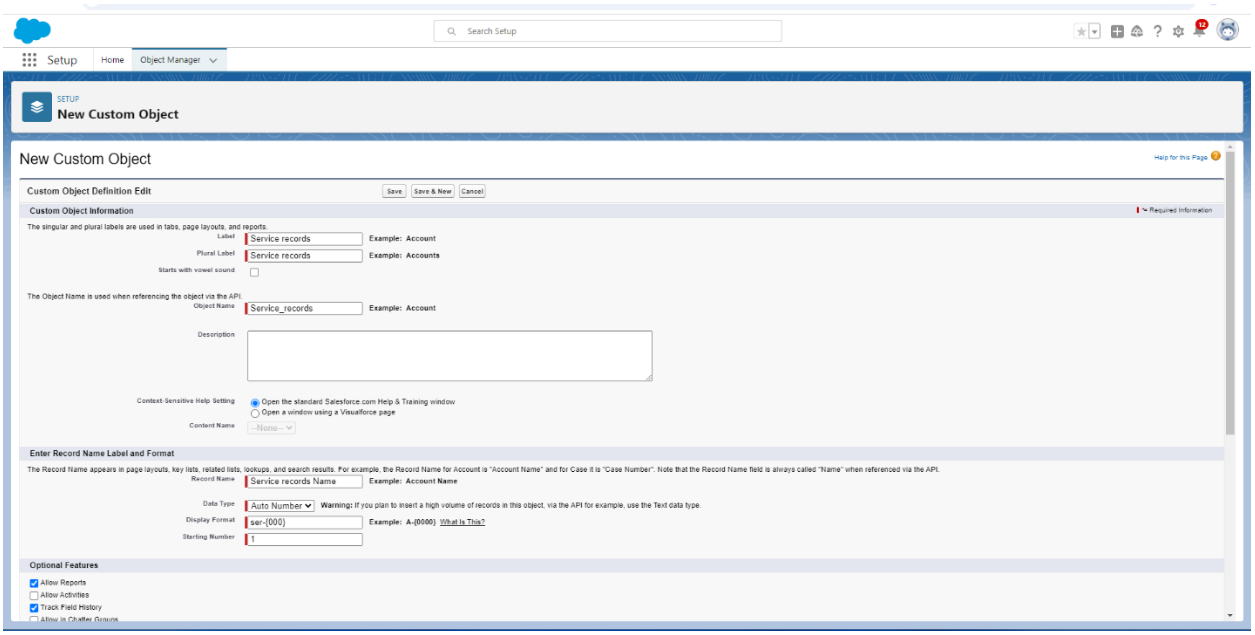
Create Customer DetailsObject

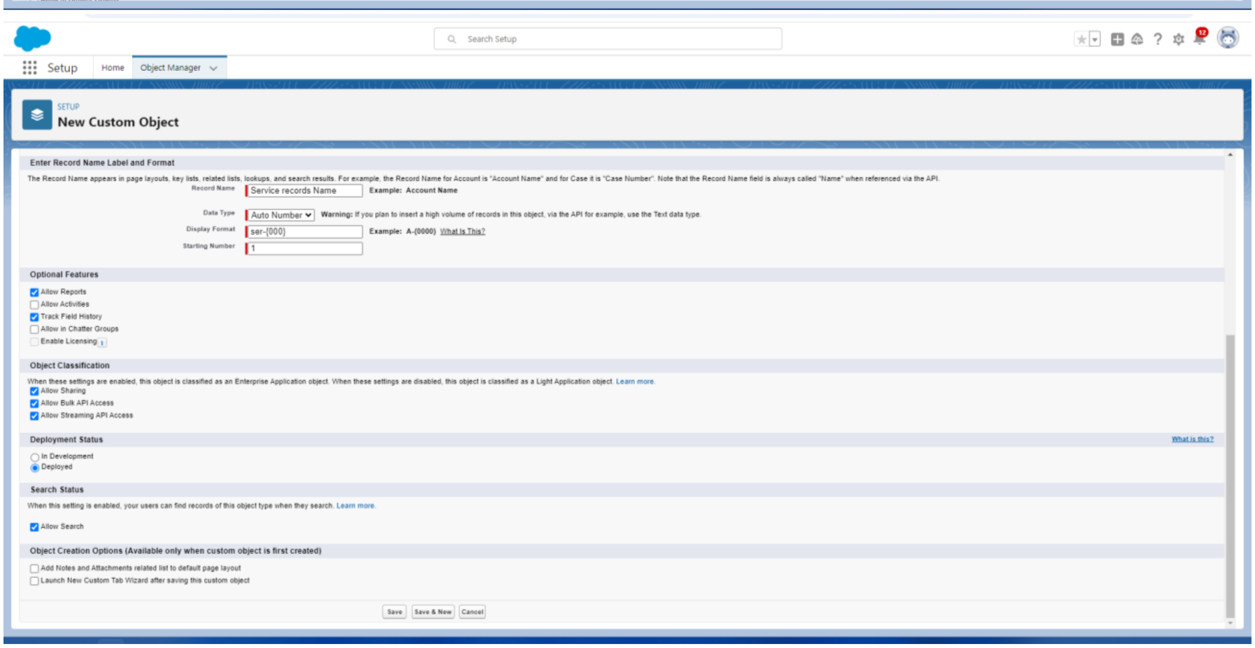


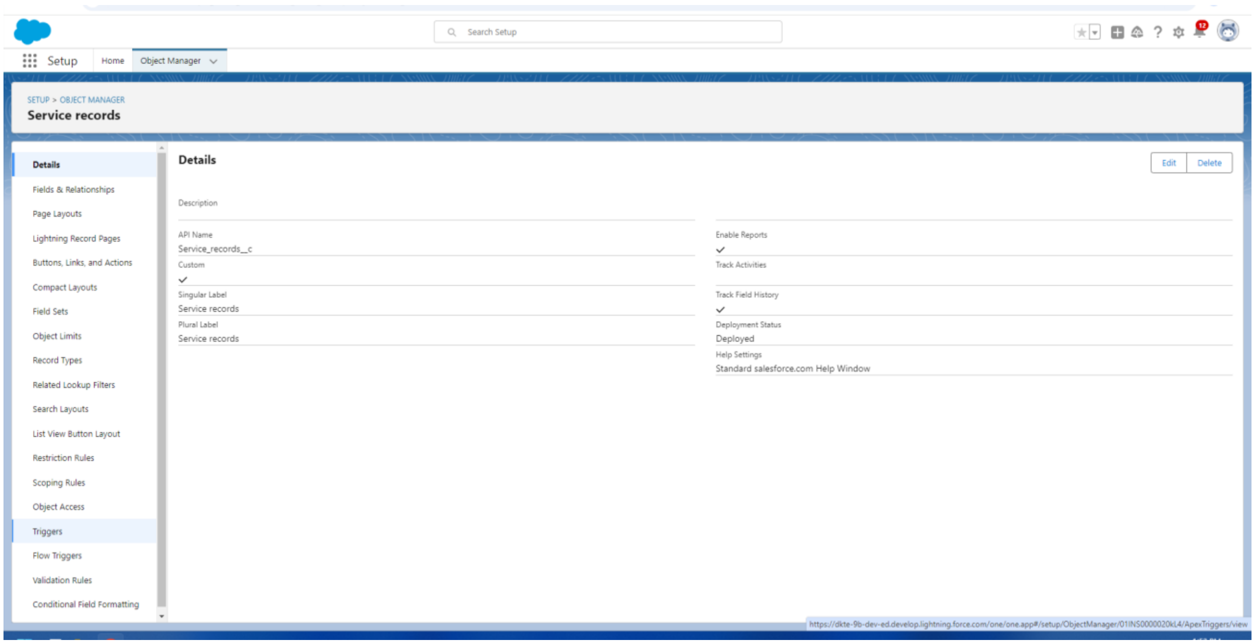
Create Appointment Object



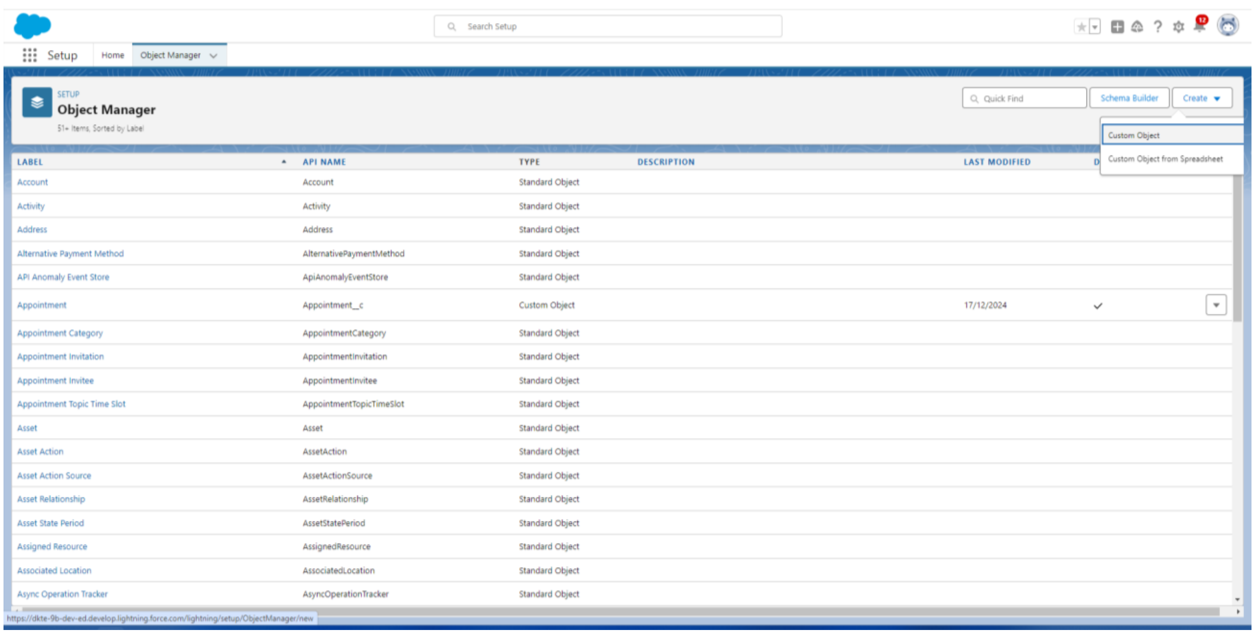
Create Service records Object

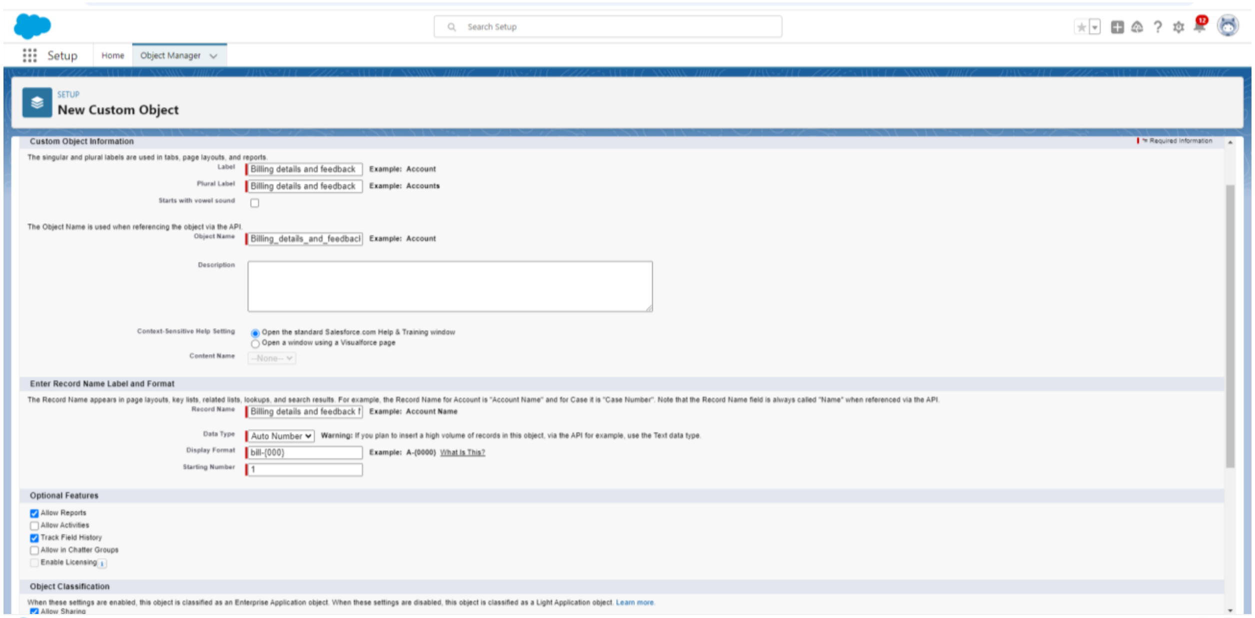


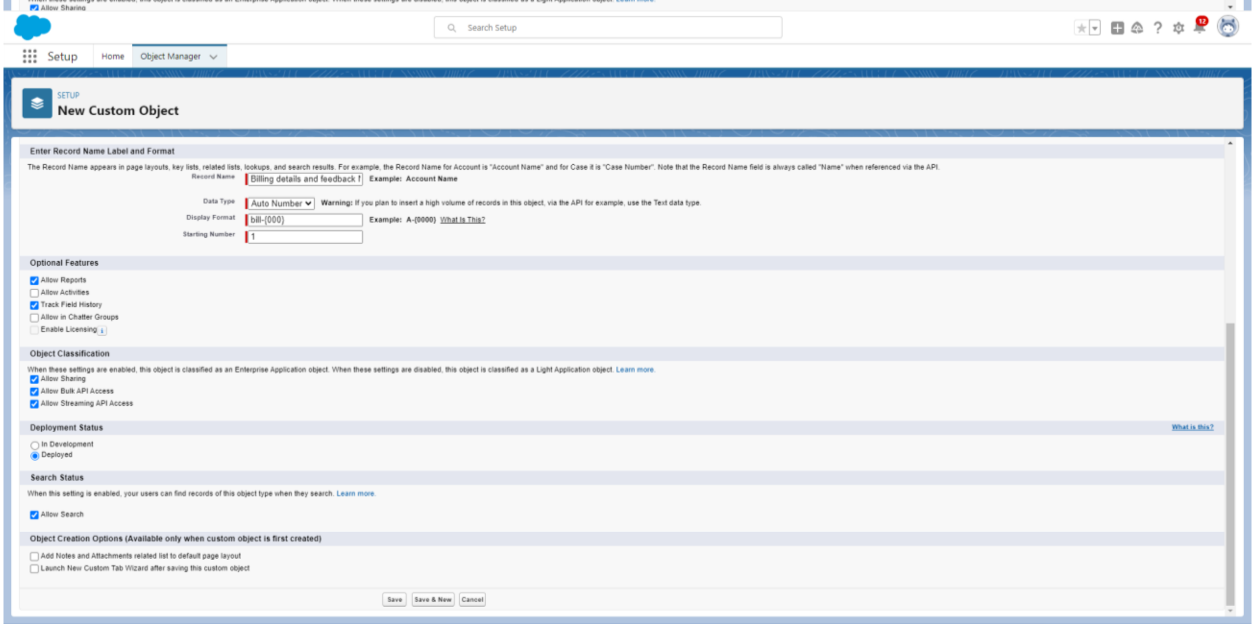


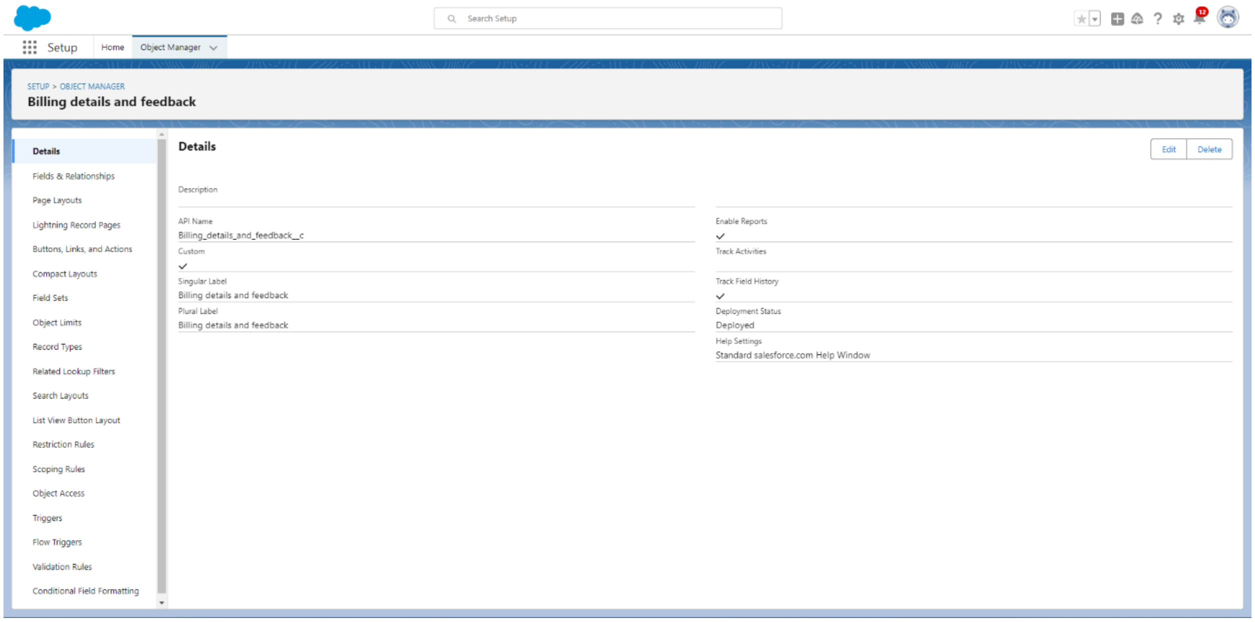


Create Billing details and feedback Object

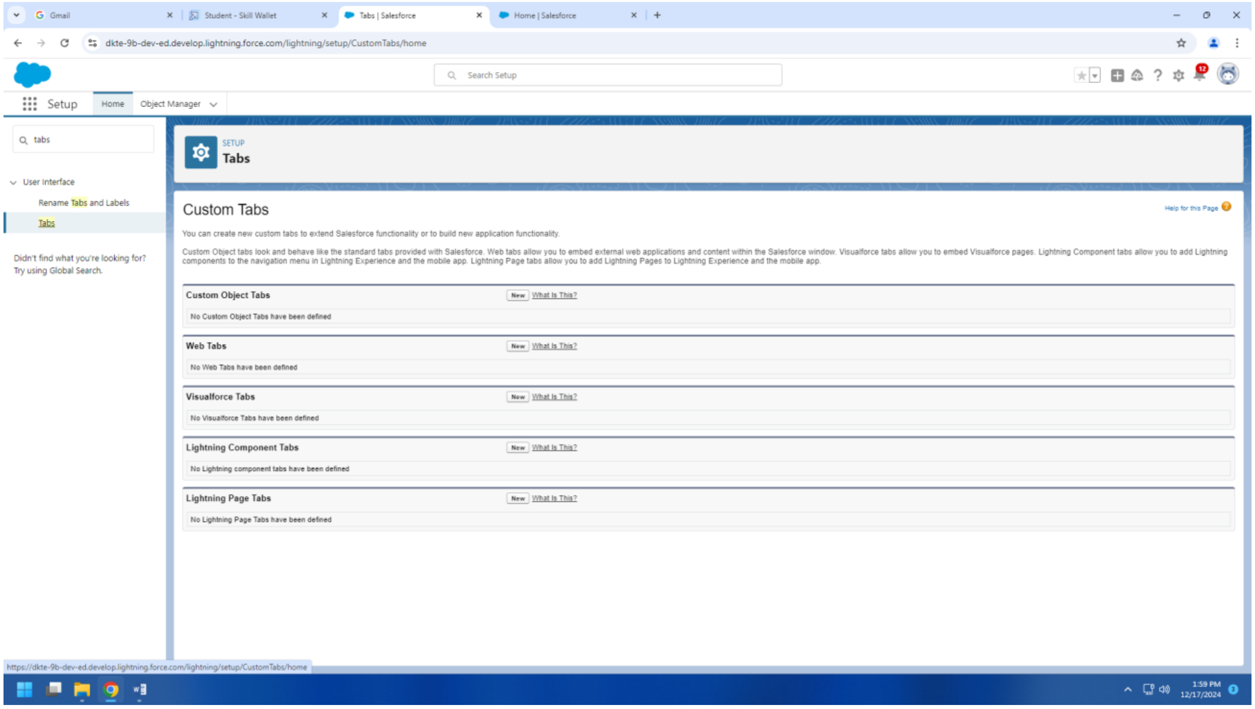


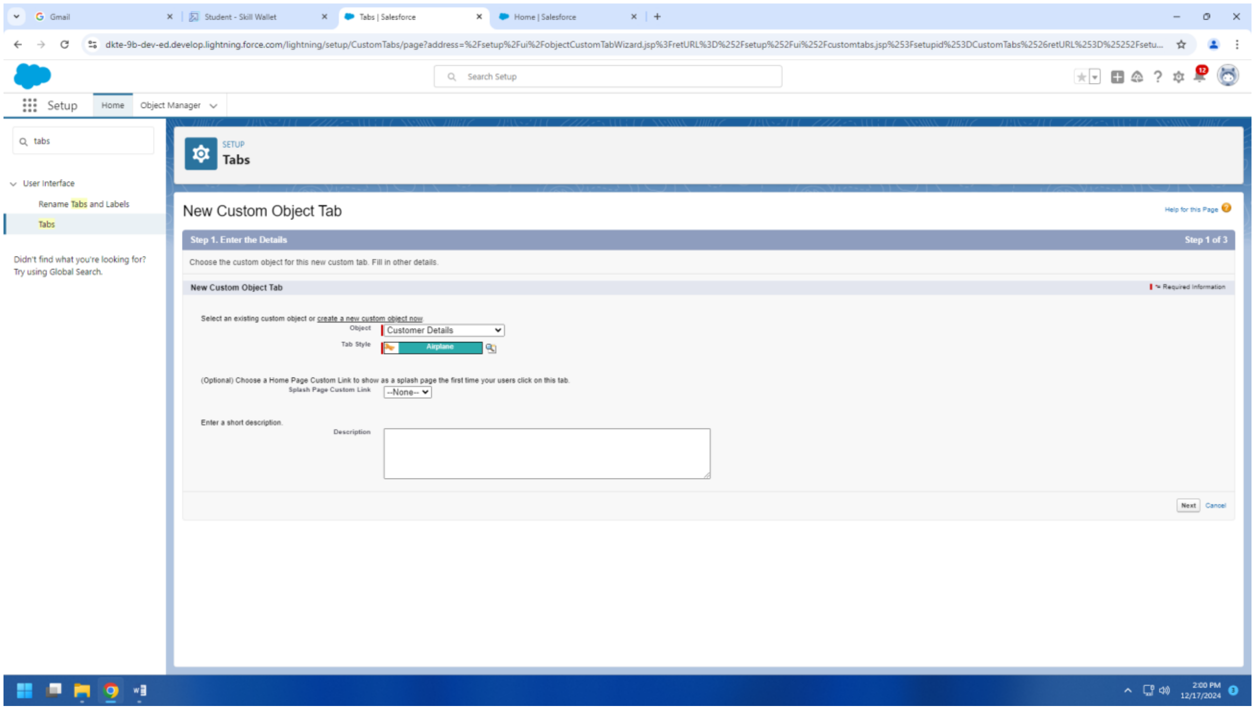

Search Setup
Setup
Home
Object Manager
SETUP
New Custom Object
Custom Object Information
= Required Information
The singular and plural labels are used in tabs, page layouts, and reports.
Label
Billing details and feedback
Example: Account
Plural Label
Billing details and feedback
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Billing_details_and_feedbacl
Example: Account
Description
Context-Sensitive Help Setting
Open the standard Salesforce.com Help & Training window
Open a window using a Visualforce page
Content Name
--None--
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 I
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

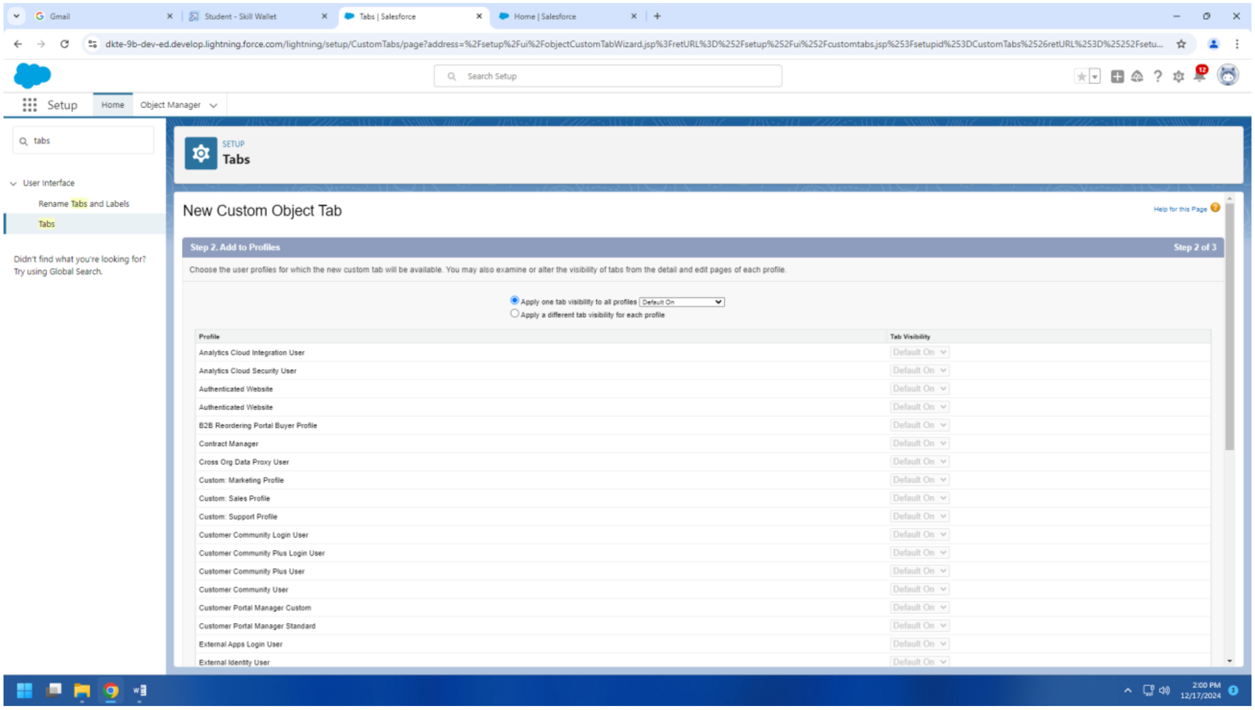

Search Setup
Setup
Home
Object Manager
SETUP
New Custom Object
Enter Record Name Label and Format
The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.
Record Name
Billing details and feedback I
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
What is this?
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

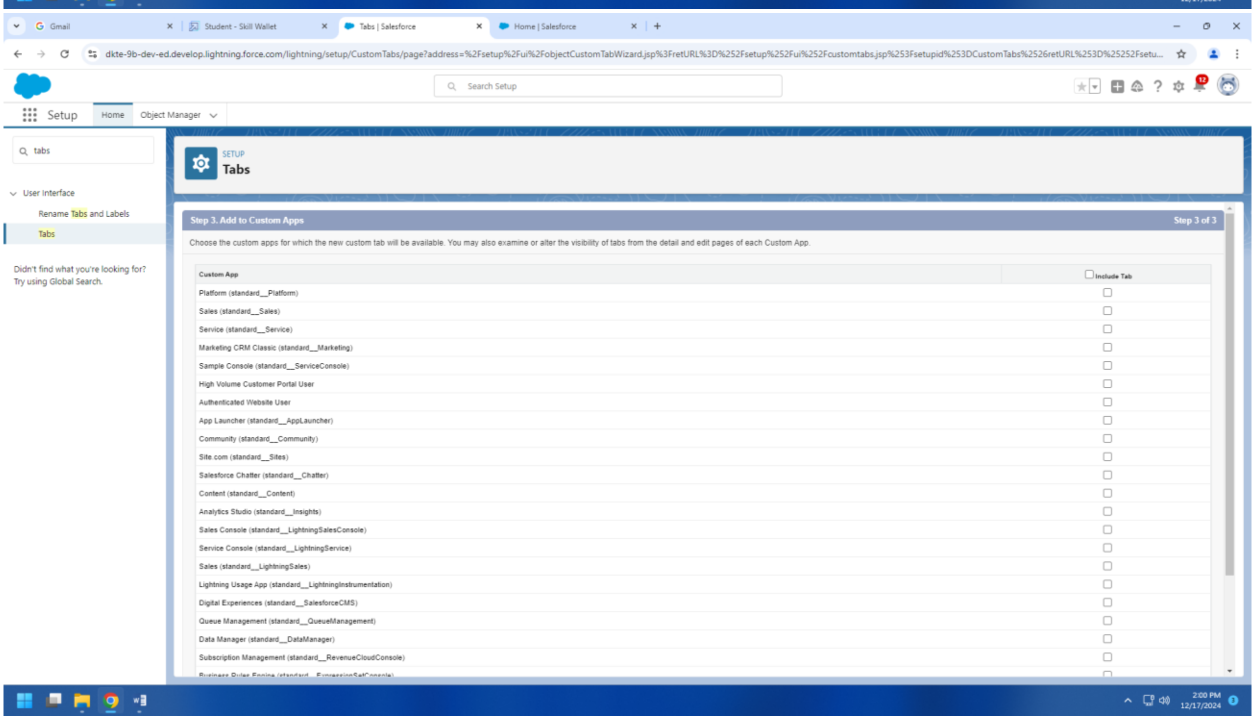

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing details and feedback
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Validation Rules
Conditional Field Formatting
Details
Edit
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

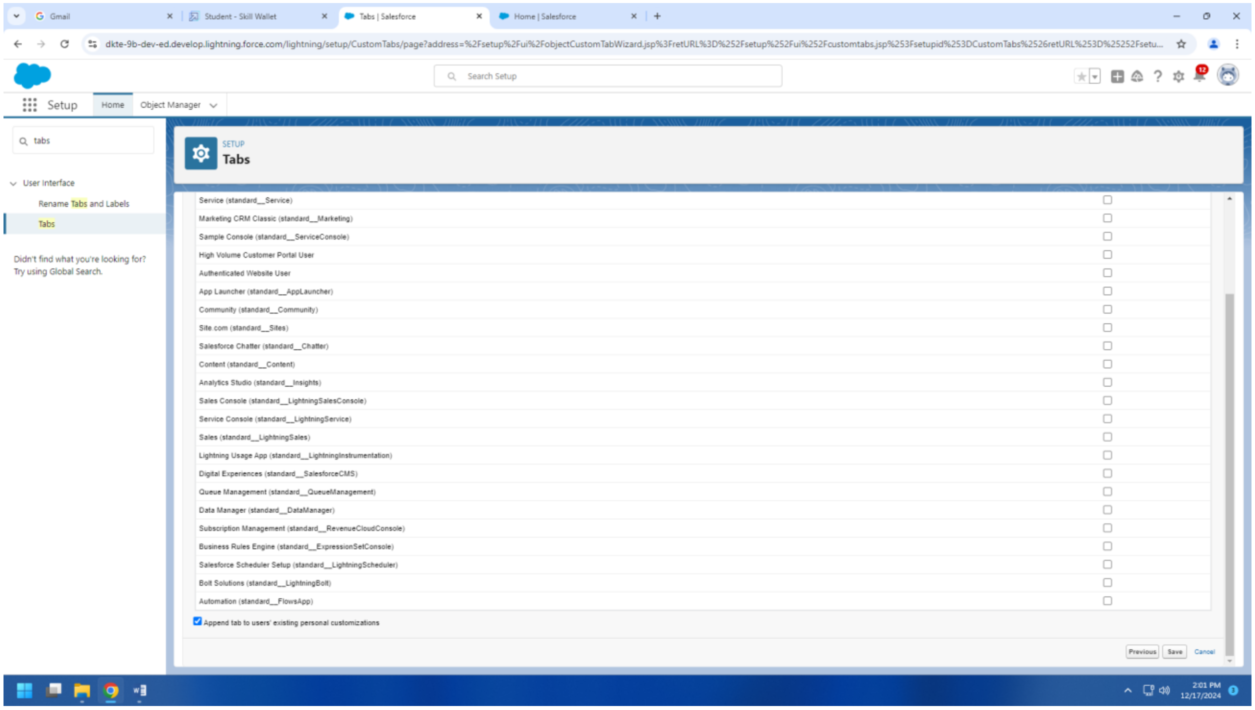
Tabs

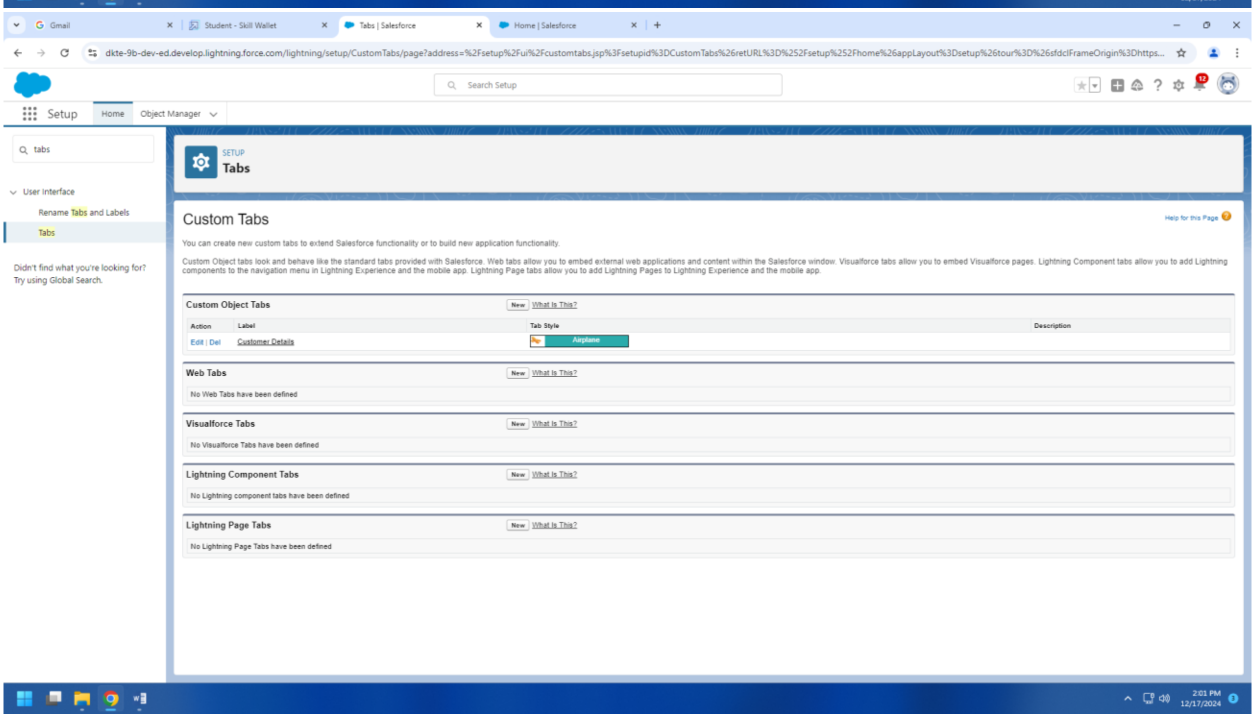


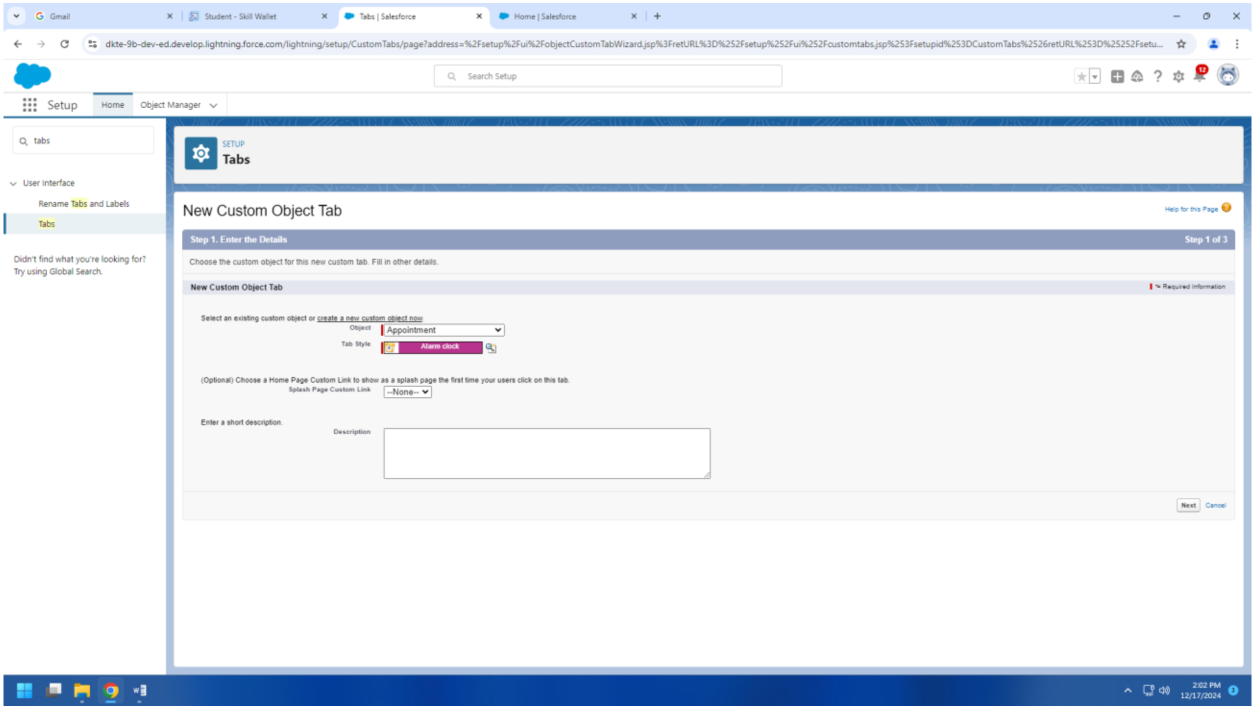
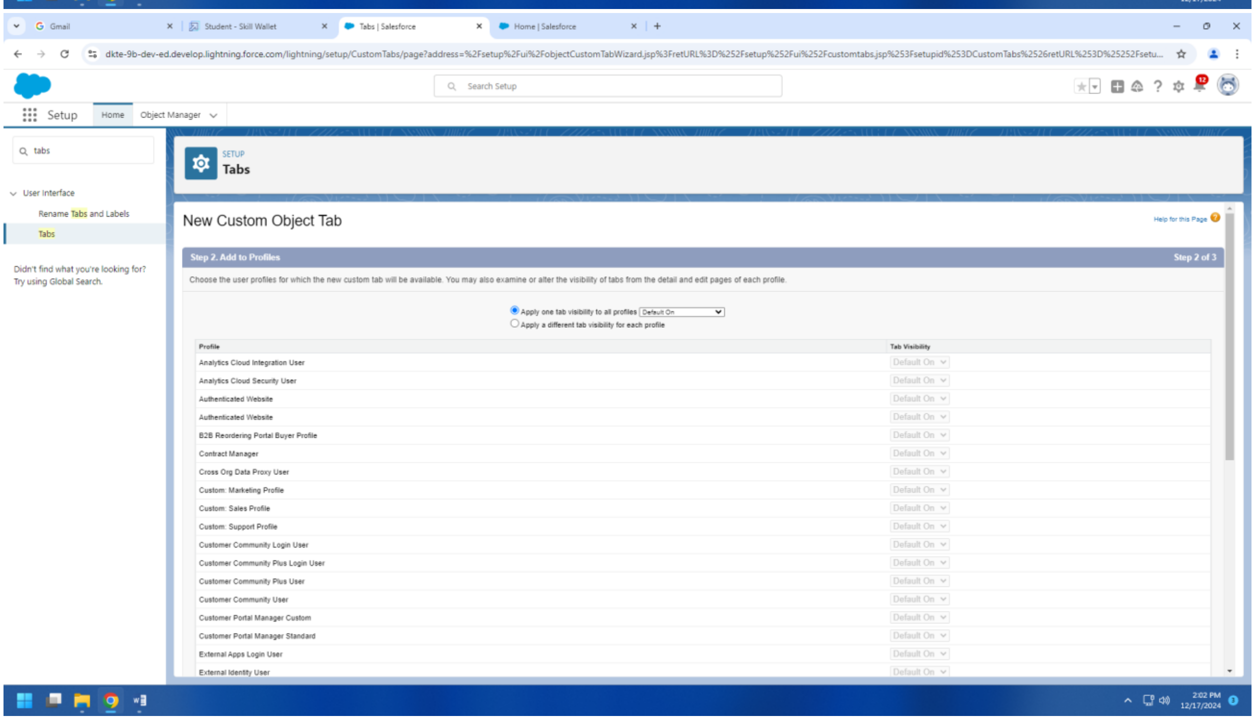


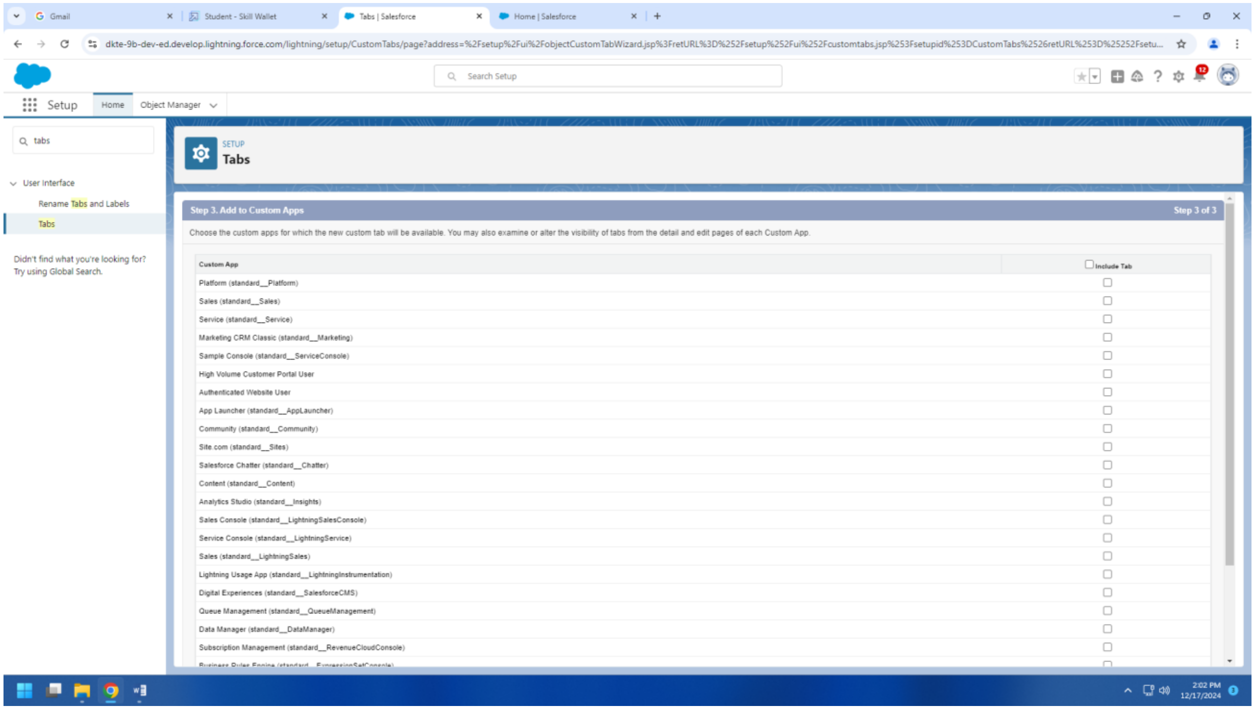

Gmail
Student - Skill Wallet
Tabs | Salesforce
Home | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL%3D%252Fsetup%252Fui%252Fcustomtabs.jsp%253Fsetupid%253DCustomTabs%2526retURL%253D%25252Fsetu...
Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for? Try using Global Search.
SETUP
Tabs
New Custom Object Tab
Help for this Page
Step 2. Add to Profiles
Step 2 of 3
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
Analytics Cloud Security User
Authenticated Website
Authenticated Website
B2B Reordering Portal Buyer Profile
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Customer Community Login User
Customer Community Plus Login User
Customer Community Plus User
Customer Community User
Customer Portal Manager Custom
Customer Portal Manager Standard
External Apps Login User
External Identity User
Default On
2:00 PM
12/17/2024

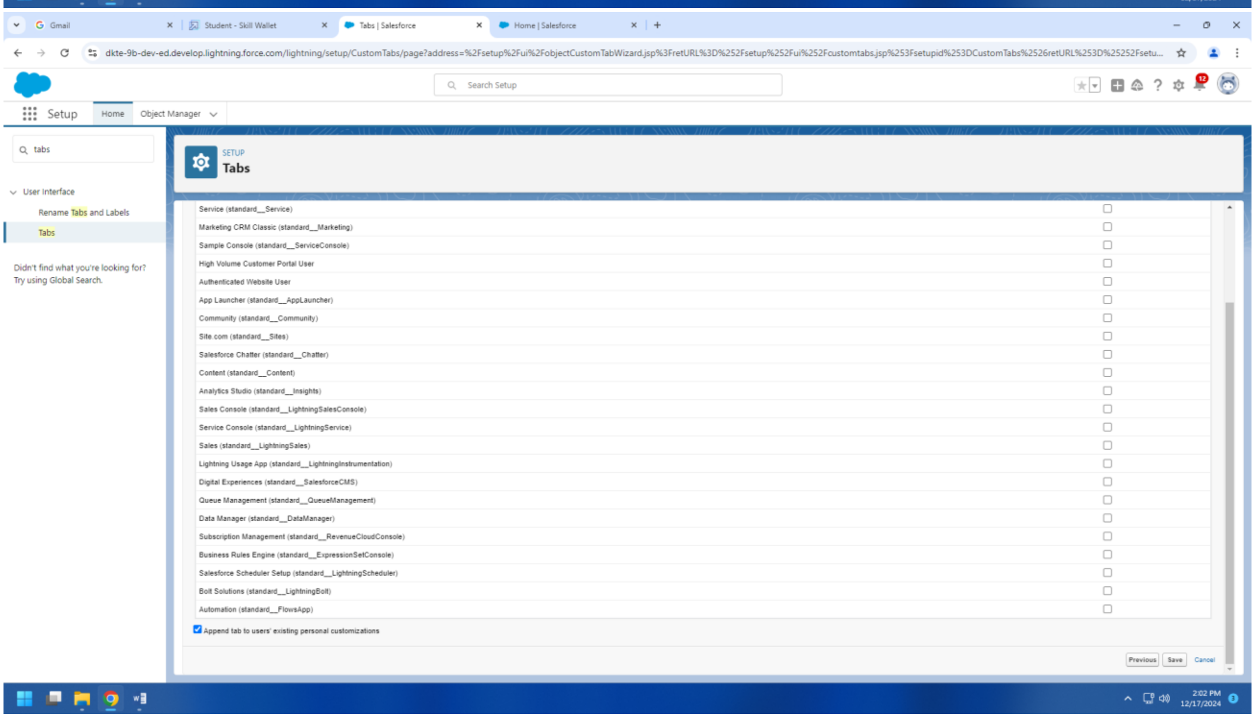

Gmail
Student - Skill Wallet
Tabs | Salesforce
Home | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL%3D%252Fsetup%252Fui%252Fcustomtabs.jsp%253Fsetupid%253DCustomTabs%2526retURL%253D%25252Fsetu...
Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for? Try using Global Search.
SETUP
Tabs
Step 3. Add to Custom Apps
Step 3 of 3
Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.
Custom App
Include Tab
Platform (standard__Platform)
Sales (standard__Sales)
Service (standard__Service)
Marketing CRM Classic (standard__Marketing)
Sample Console (standard__ServiceConsole)
High Volume Customer Portal User
Authenticated Website User
App Launcher (standard__AppLauncher)
Community (standard__Community)
Site.com (standard__Sites)
Salesforce Chatter (standard__Chatter)
Content (standard__Content)
Analytics Studio (standard__Insights)
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)
2:00 PM
12/17/2024

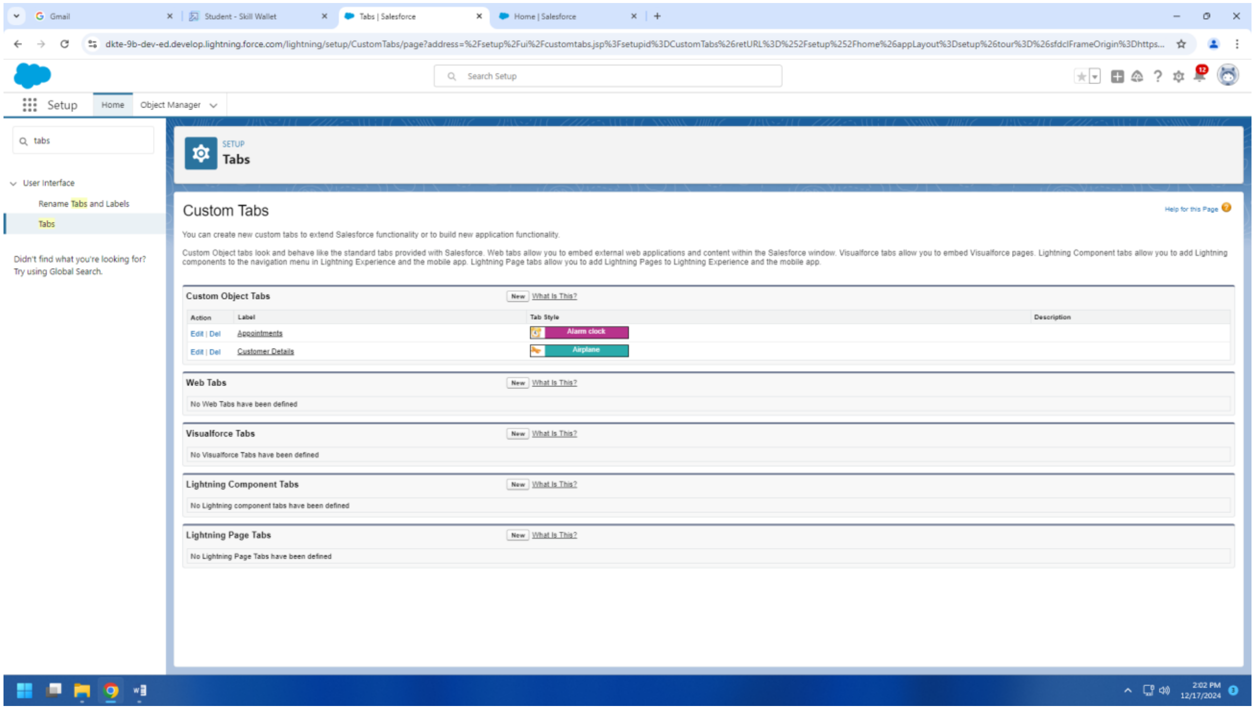

Gmail
Student - Skill Wallet
Tabs | Salesforce
Home | Salesforce
Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for? Try using Global Search.
SETUP
Tabs
Service (standard__Service)
Marketing CRM Classic (standard__Marketing)
Sample 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__ExpressionSetConsole)
Salesforce Scheduler Setup (standard__LightningScheduler)
Bolt Solutions (standard__LightningBolt)
Automation (standard__FlowsApp)
Append tab to users' existing personal customizations
Previous
Save
Cancel
2:01 PM
12/17/2024

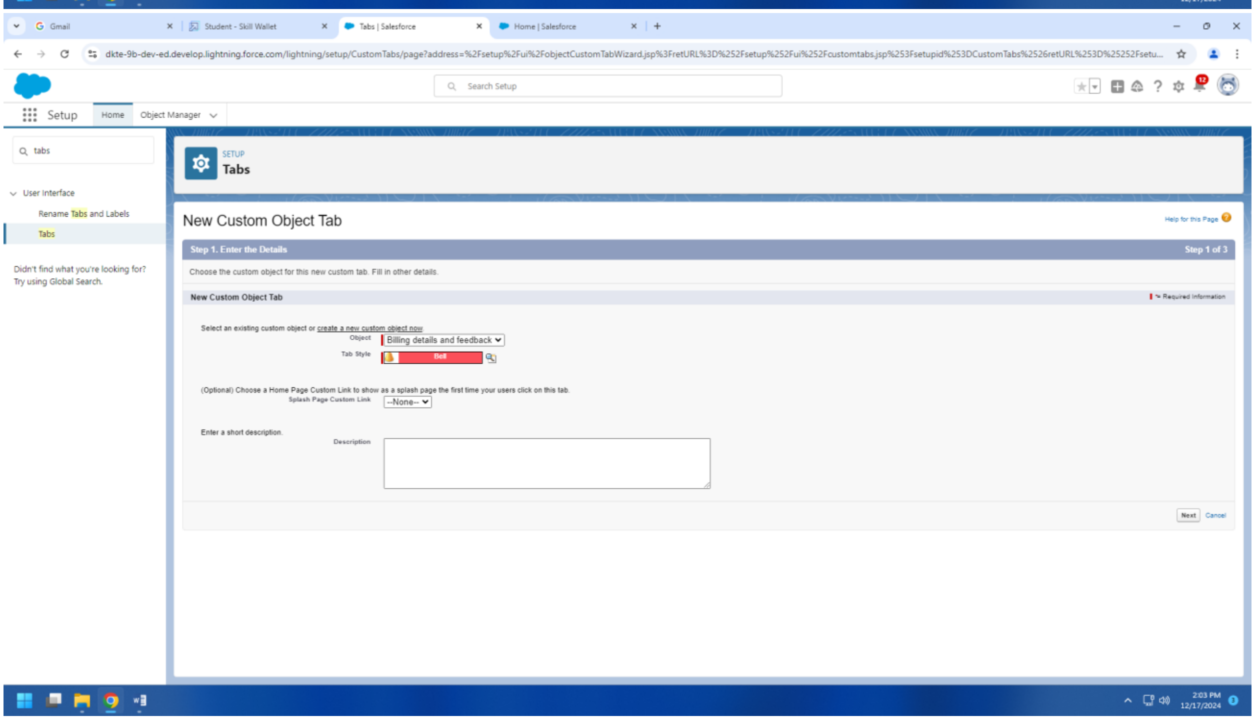

Gmail
Student - Skill Wallet
Tabs | Salesforce
Home | Salesforce
Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for? Try using Global Search.
SETUP
Tabs
Custom Tabs
Help for this Page
You can create new custom tabs to extend Salesforce functionality or to build new application functionality.
Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.
Custom Object Tabs
New
What Is This?
Action
Label
Tab Style
Description
Edit | Del
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
2:01 PM
12/17/2024

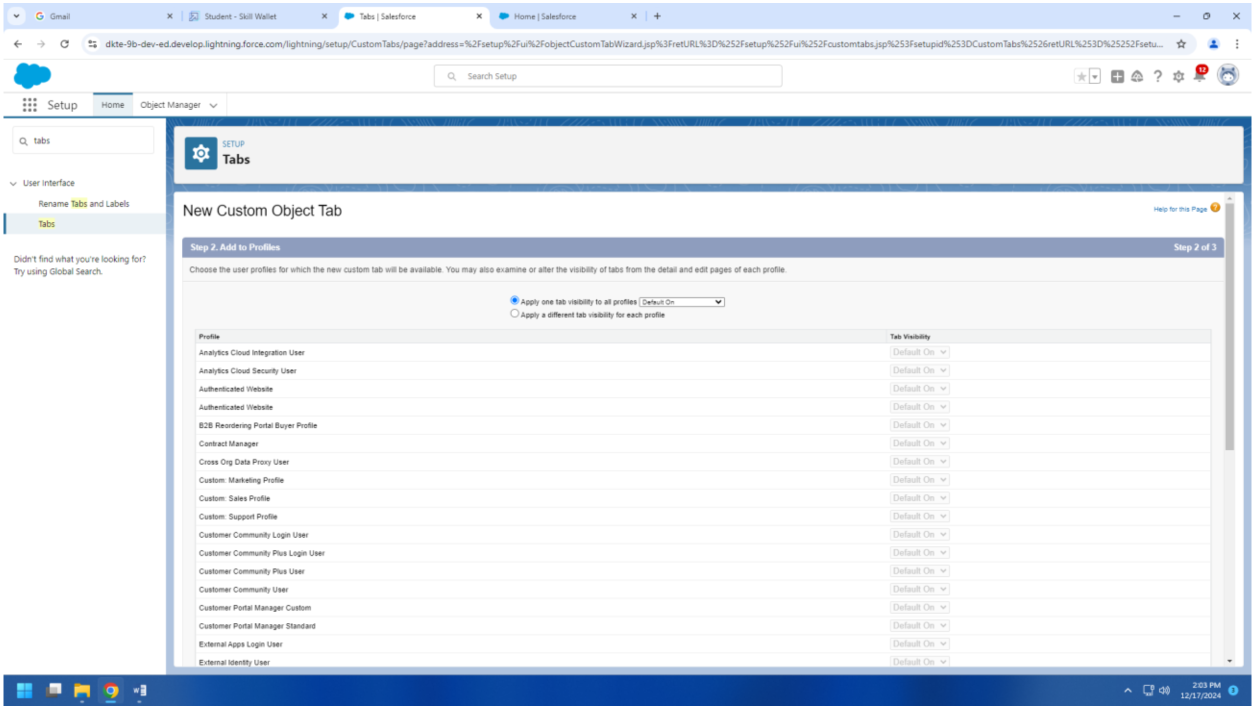

Gmail
Student - Skill Wallet
Tabs | Salesforce
Home | Salesforce
Setup
Home
Object Manager
Search Setup
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for? Try using Global Search.
SETUP
Tabs
New Custom Object Tab
Help for this Page
Step 1. Enter the Details
Step 1 of 3
Choose the custom object for this new custom tab. Fill in other details.
New Custom Object Tab
= Required Information
Select an existing custom object or create a new custom object now.
Object
Appointment
Tab Style
Alarm clock
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link
--None--
Enter a short description.
Description
Next
Cancel
2:02 PM
12/17/2024

Gmail
Student - Skill Wallet
Tabs | Salesforce
Home | Salesforce
Setup
Home
Object Manager
Search Setup
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for? Try using Global Search.
SETUP
Tabs
New Custom Object Tab
Help for this Page
Step 2. Add to Profiles
Step 2 of 3
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
Analytics Cloud Security User
Authenticated Website
Authenticated Website
B2B Reordering Portal Buyer Profile
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Customer Community Login User
Customer Community Plus Login User
Customer Community Plus User
Customer Community User
Customer Portal Manager Custom
Customer Portal Manager Standard
External Apps Login User
External Identity User
2:02 PM
12/17/2024

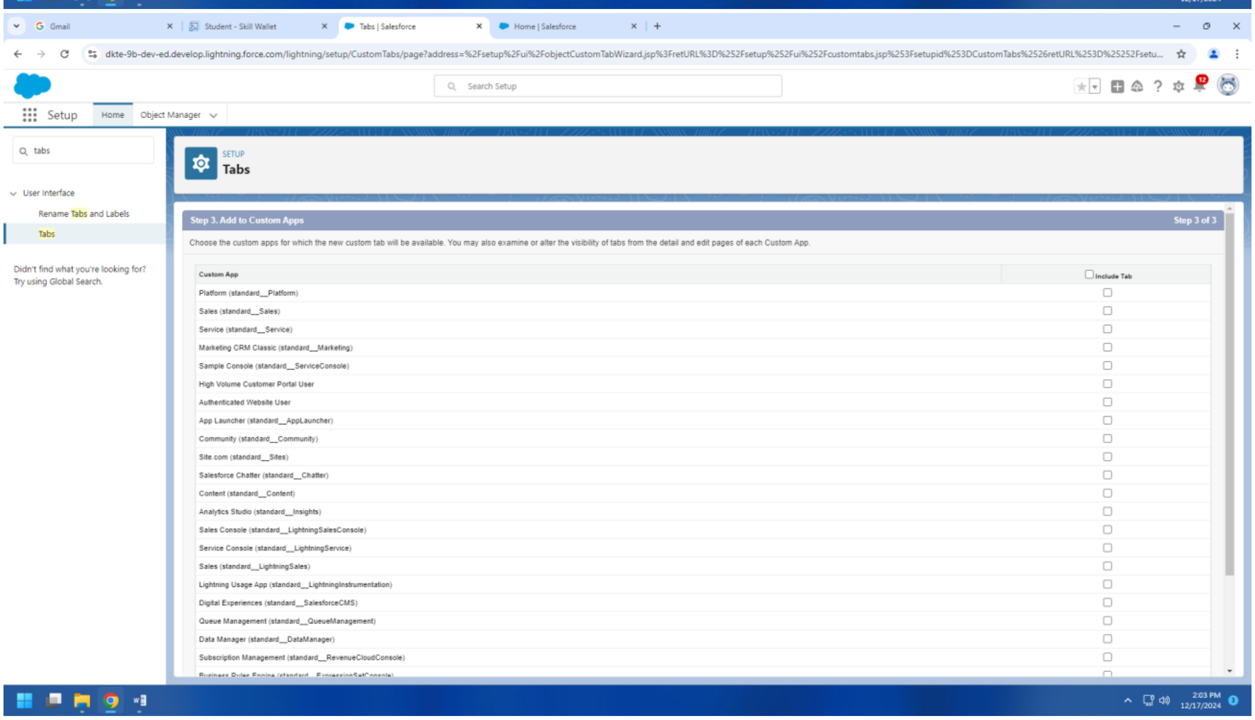

Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
SETUP
Tabs
Step 3. Add to Custom Apps
Step 3 of 3
Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.
Custom App
Include Tab
Platform (standard__Platform)
Sales (standard__Sales)
Service (standard__Service)
Marketing CRM Classic (standard__Marketing)
Sample Console (standard__ServiceConsole)
High Volume Customer Portal User
Authenticated Website User
App Launcher (standard__AppLauncher)
Community (standard__Community)
Site.com (standard__Sites)
Salesforce Chatter (standard__Chatter)
Content (standard__Content)
Analytics Studio (standard__Insights)
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)
2:02 PM
12/17/2024

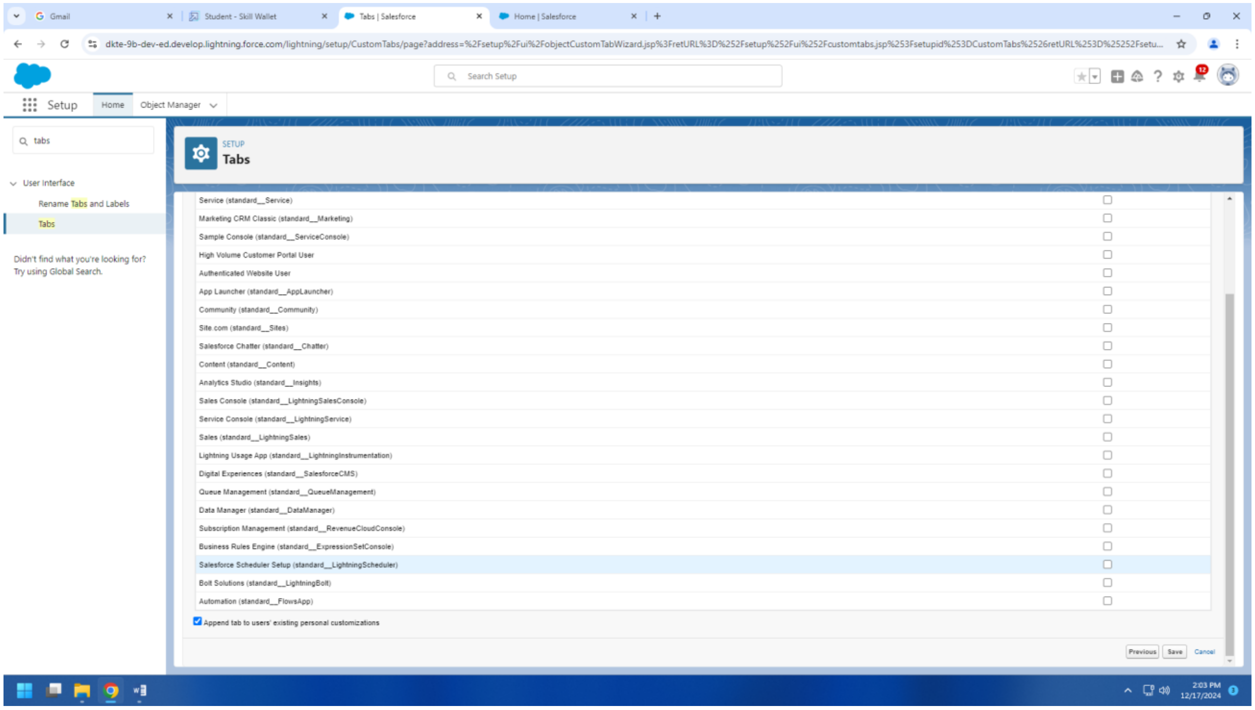

Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
SETUP
Tabs
Service (standard__Service)
Marketing CRM Classic (standard__Marketing)
Sample Console (standard__ServiceConsole)
High Volume Customer Portal User
Authenticated 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__ExpressionSetConsole)
Salesforce Scheduler Setup (standard__LightningScheduler)
Bolt Solutions (standard__LightningBolt)
Automation (standard__FlowsApp)
Append tab to users' existing personal customizations
Previous
Save
Cancel
2:02 PM
12/17/2024

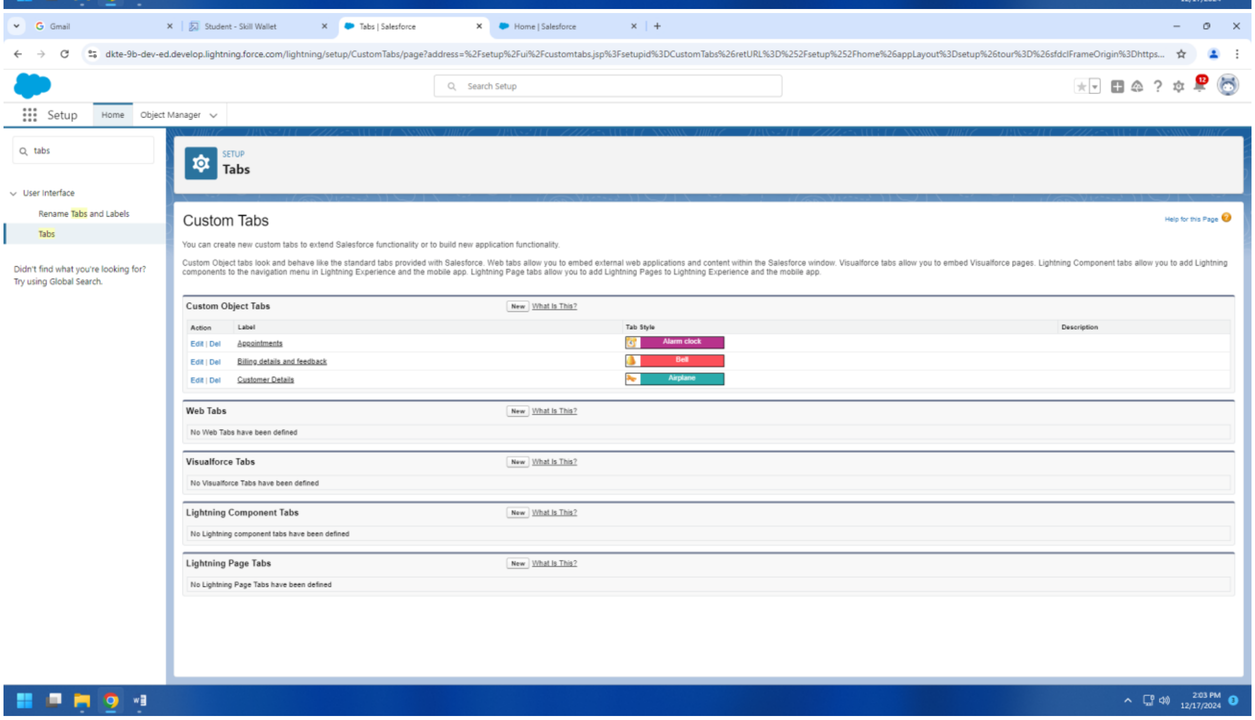

Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for? Try using Global Search.
SETUP
Tabs
Custom Tabs
You can create new custom tabs to extend Salesforce functionality or to build new application functionality.
Custom Object tabs look and behave 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 | Del | Appointments | Alarm clock
Edit | Del | 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
2:02 PM
12/17/2024

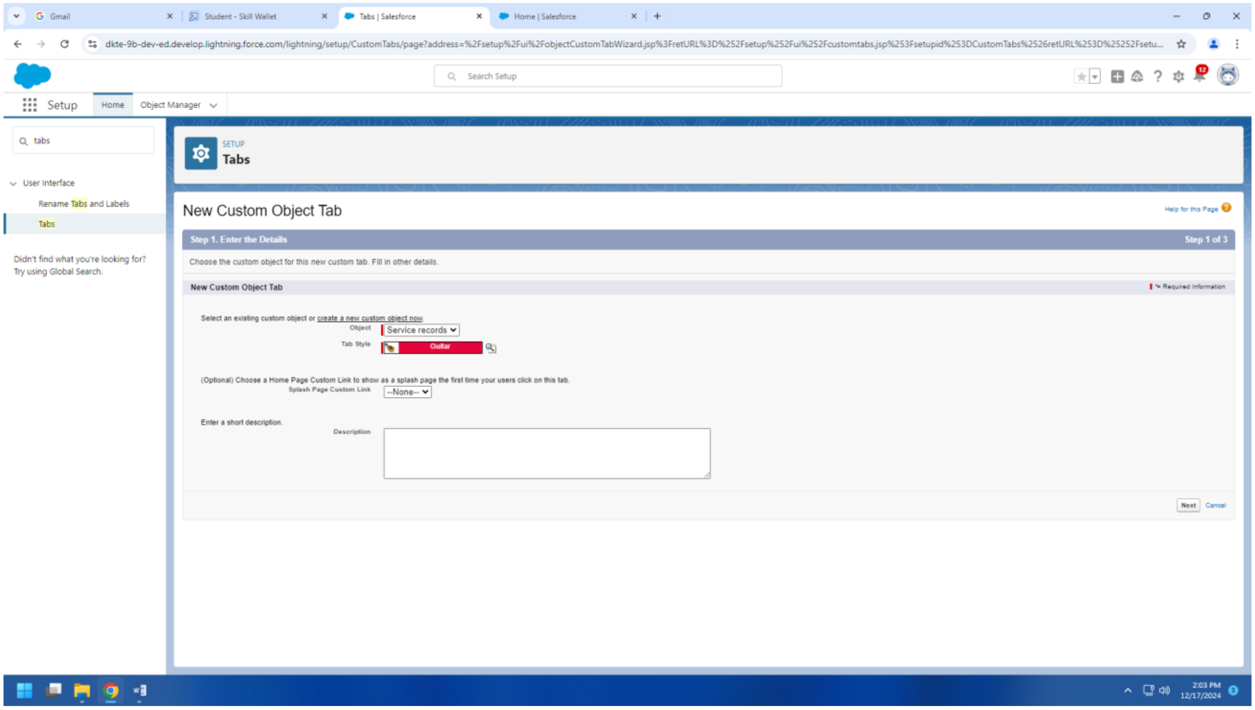

Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
SETUP
Tabs
New Custom Object Tab
Step 1. Enter the Details
Step 1 of 3
Choose the custom object for this new custom tab. Fill in other details.
New Custom Object Tab
Select an existing custom object or create a new custom object now
Object
Billing details and feedback
Tab Style
Bell
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link
--None--
Enter a short description.
Description
Next
Cancel
2:03 PM
12/17/2024

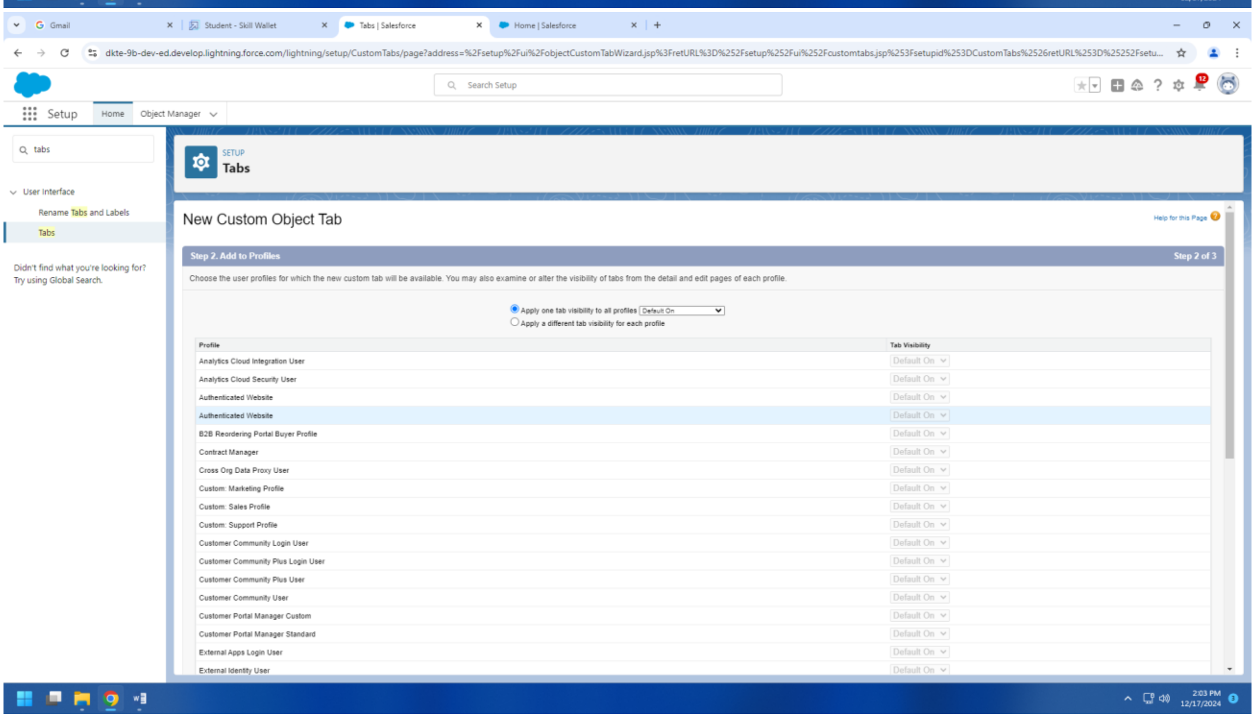

Gmail
Student - Skill Wallet
Tabs | Salesforce
Home | Salesforce
Setup
Home
Object Manager
Search Setup
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for? Try using Global Search.
SETUP
Tabs
New Custom Object Tab
Help for this Page
Step 2. Add to Profiles
Step 2 of 3
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
Analytics Cloud Security User
Authenticated Website
Authenticated Website
B2B Reordering Portal Buyer Profile
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Customer Community Login User
Customer Community Plus Login User
Customer Community Plus User
Customer Community User
Customer Portal Manager Custom
Customer Portal Manager Standard
External Apps Login User
External Identity User
2:03 PM
12/17/2024

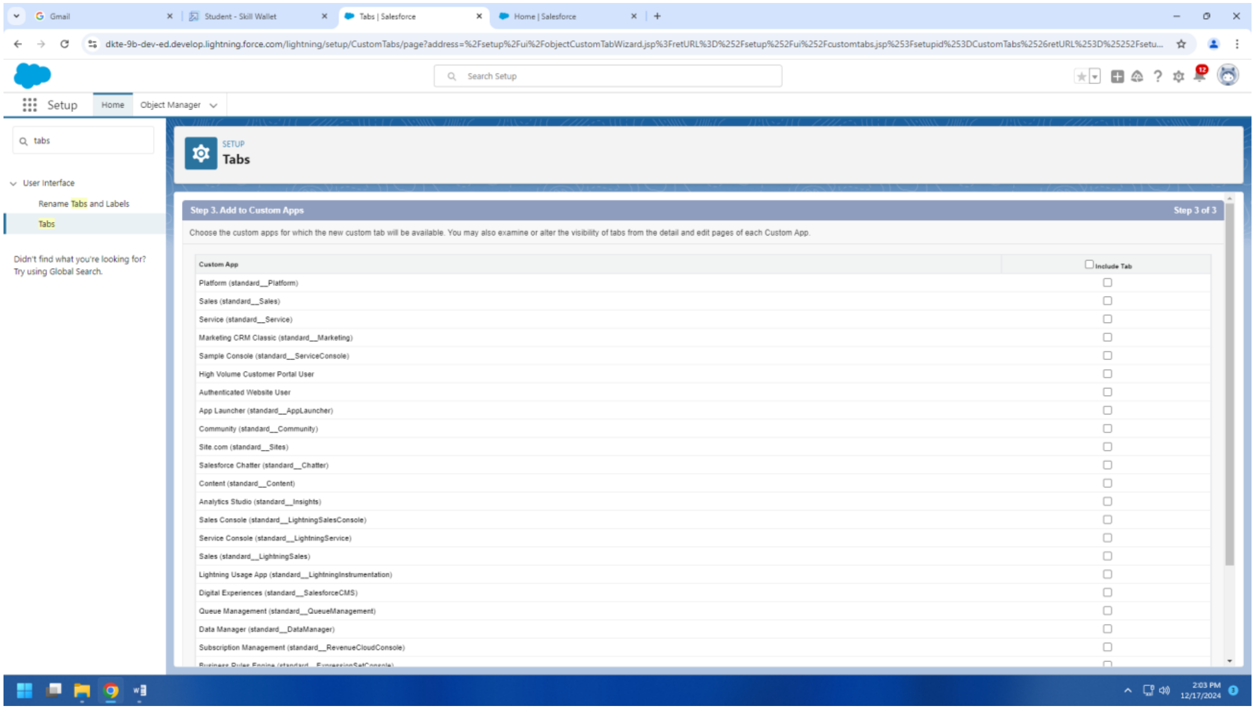

Gmail
Student - Skill Wallet
Tabs | Salesforce
Home | Salesforce
Setup
Home
Object Manager
Search Setup
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for? Try using Global Search.
SETUP
Tabs
Step 3. Add to Custom Apps
Step 3 of 3
Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.
Custom App
Include Tab
Platform (standard__Platform)
Sales (standard__Sales)
Service (standard__Service)
Marketing CRM Classic (standard__Marketing)
Sample Console (standard__ServiceConsole)
High Volume Customer Portal User
Authenticated Website User
App Launcher (standard__AppLauncher)
Community (standard__Community)
Site.com (standard__Sites)
Salesforce Chatter (standard__Chatter)
Content (standard__Content)
Analytics Studio (standard__Insights)
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)
2:03 PM
12/17/2024

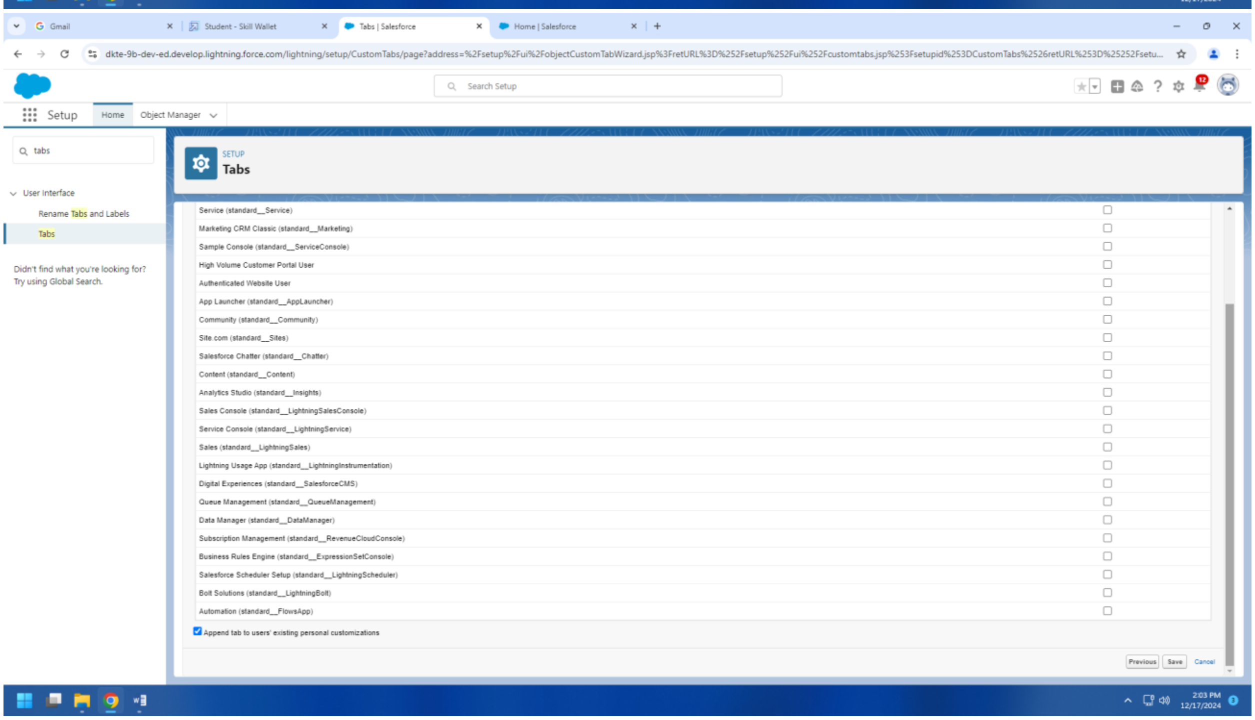

Gmail
Student - Skill Wallet
Tabs | Salesforce
Home | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2FobjectCustomTabWizard.jsp%3FretURL%3D%252Fsetup%252Fui%252Fcustomtabs.jsp%253Fsetupid%253DCustomTabs%2526retURL%253D%25252Fsetu...
Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
SETUP
Tabs
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__ExpressionSetConsole)
Salesforce Scheduler Setup (standard__LightningScheduler)
Bolt Solutions (standard__LightningBolt)
Automation (standard__FlowsApp)
Append tab to users' existing personal customizations
Previous
Save
Cancel
2:03 PM
12/17/2024


Gmail
Student - Skill Wallet
Tabs | Salesforce
Home | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fui%2Fcustomtabs.jsp%3Fsetupid%3DCustomTabs%26retURL%3D%252Fsetup%252Fhome%26appLayout%3Dsetup%26tour%3D%26sfdcIFrameOrigin%3Dhttps...
Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
SETUP
Tabs
Custom Tabs
Help for this Page
You can create new custom tabs to extend Salesforce functionality or to build new application functionality.
Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.
Custom Object Tabs
New
What Is This?
Action
Label
Tab Style
Description
Edit | Del
Appointments
Alarm clock
Edit | Del
Billing details and feedback
Bell
Edit | Del
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
2:03 PM
12/17/2024


Gmail
Student - Skill Wallet
Tabs | Salesforce
Home | Salesforce
Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for? Try using Global Search.
SETUP
Tabs
New Custom Object Tab
Help for this Page
Step 1. Enter the Details
Step 1 of 3
Choose the custom object for this new custom tab. Fill in other details.
New Custom Object Tab
= Required Information
Select an existing custom object or create a new custom object now
Object
Service records
Tab Style
Guitar
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link
--None--
Enter a short description.
Description
Next
Cancel
2:03 PM
12/17/2024


Gmail
Student - Skill Wallet
Tabs | Salesforce
Home | Salesforce
Search Setup
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for? Try using Global Search.
SETUP
Tabs
New Custom Object Tab
Help for this Page
Step 2. Add to Profiles
Step 2 of 3
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
Analytics Cloud Security User
Authenticated Website
Authenticated Website
B2B Reordering Portal Buyer Profile
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Customer Community Login User
Customer Community Plus Login User
Customer Community Plus User
Customer Community User
Customer Portal Manager Custom
Customer Portal Manager Standard
External Apps Login User
External Identity User
2:03 PM
12/17/2024


Tabs | Salesforce
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for? Try using Global Search.
SETUP
Tabs
Step 3. Add to Custom Apps
Step 3 of 3
Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.
Custom App
Include Tab
Platform (standard__Platform)
Sales (standard__Sales)
Service (standard__Service)
Marketing CRM Classic (standard__Marketing)
Sample Console (standard__ServiceConsole)
High Volume Customer Portal User
Authenticated Website User
App Launcher (standard__AppLauncher)
Community (standard__Community)
Site.com (standard__Sites)
Salesforce Chatter (standard__Chatter)
Content (standard__Content)
Analytics Studio (standard__Insights)
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)
2:03 PM
12/17/2024


Tabs | Salesforce
Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for? Try using Global Search.
SETUP
Tabs
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)
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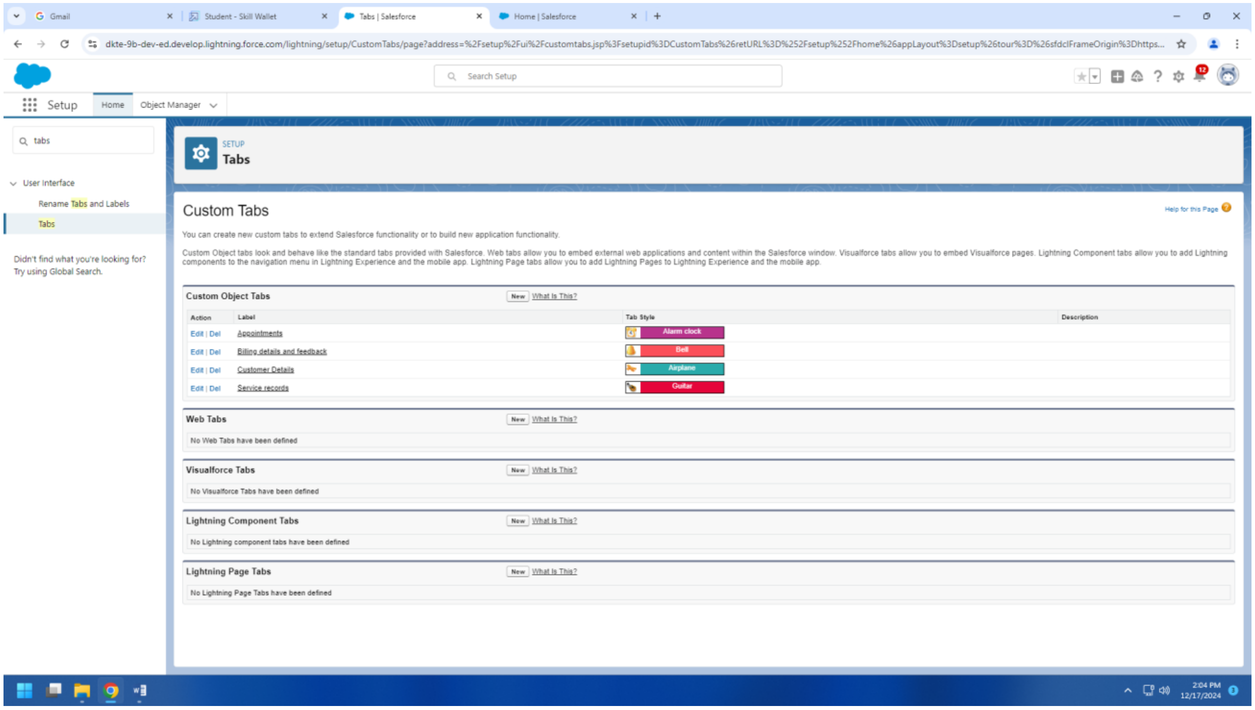
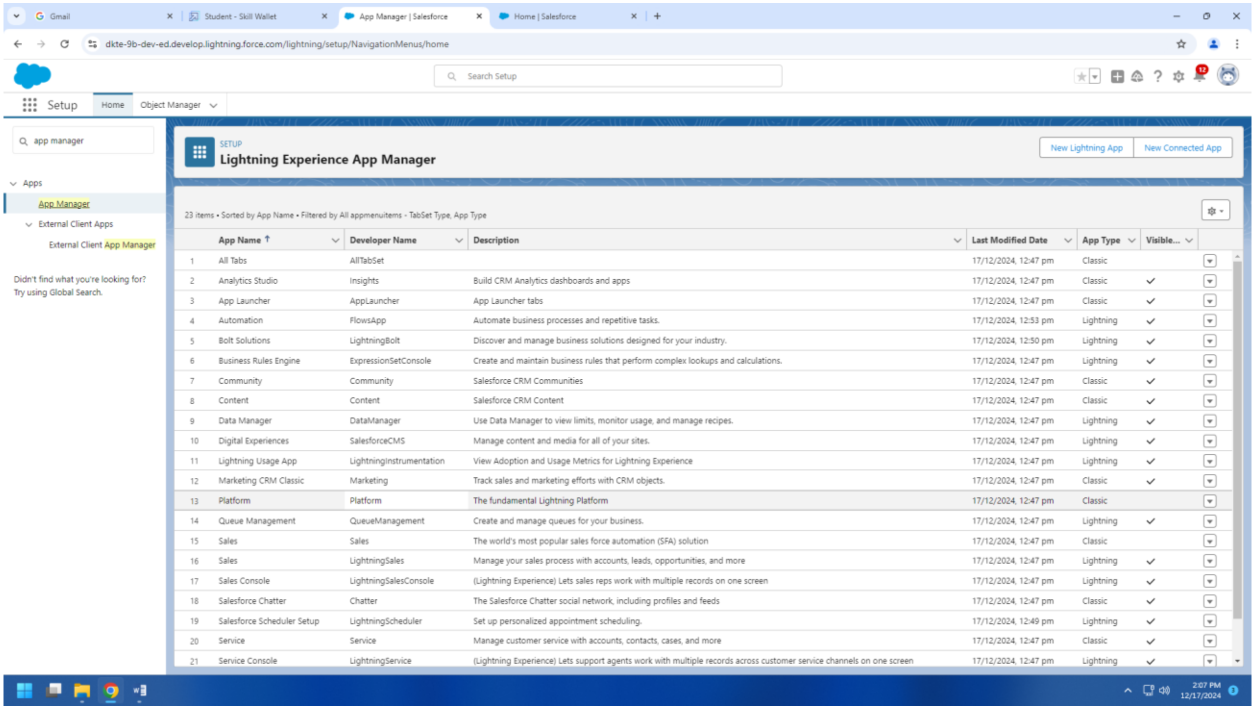
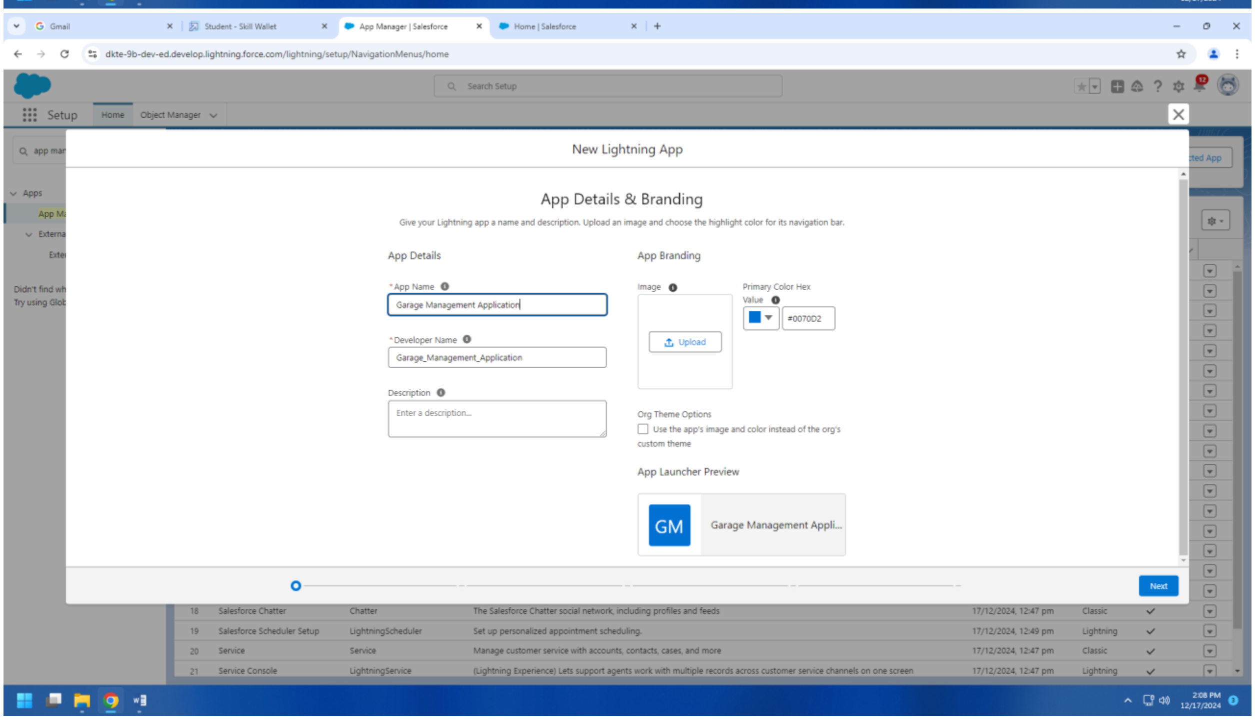
Queue Management (standard__QueueManagement)
Data Manager (standard__DataManager)
Subscription Management (standard__RevenueCloudConsole)
Business Rules Engine (standard__ExpressionSetConsole)
Salesforce Scheduler Setup (standard__LightningScheduler)
Bolt Solutions (standard__LightningBolt)
Automation (standard__FlowsApp)
Append tab to users' existing personal customizations
Previous
Save
Cancel
2:03 PM
12/17/2024

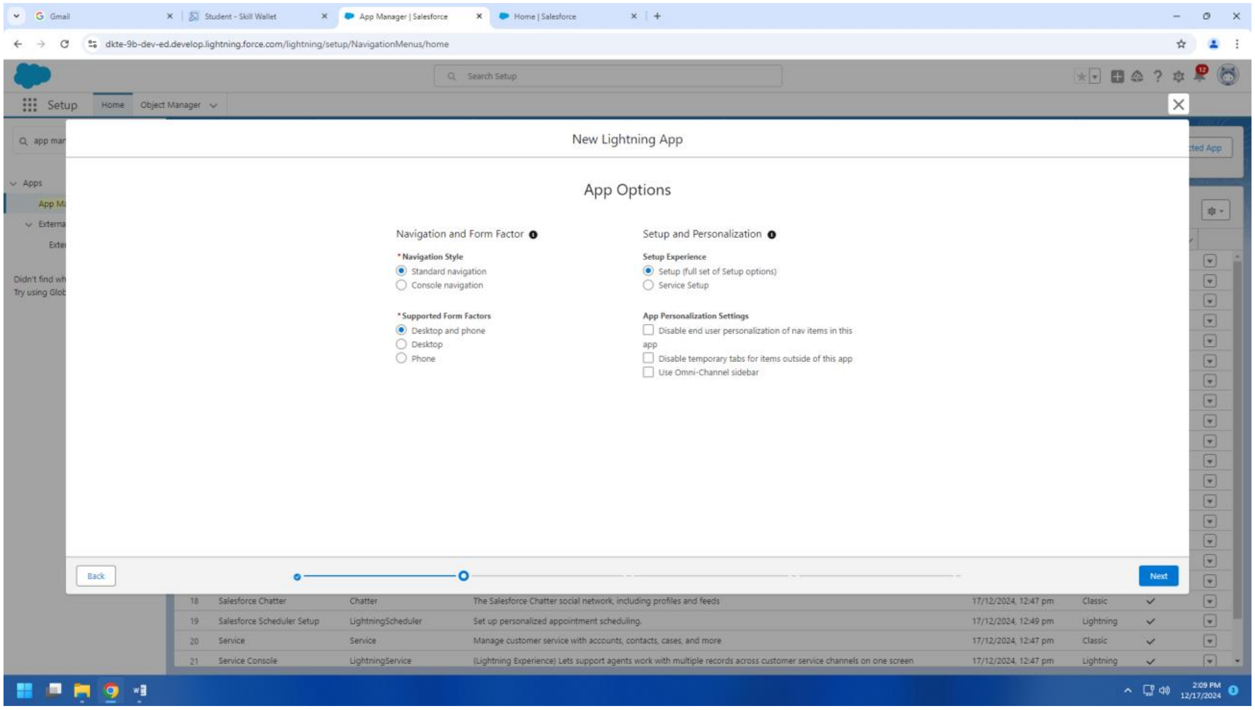

SETUP
Tabs
Custom Tabs
Help for this Page
You can create new custom tabs to extend Salesforce functionality or to build new application functionality.
Custom Object Tabs
Action
Label
Tab Style
Description
Edit | Del
Appointments
Alarm clock
Edit | Del
Billing details and feedback
Bell
Edit | Del
Customer 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

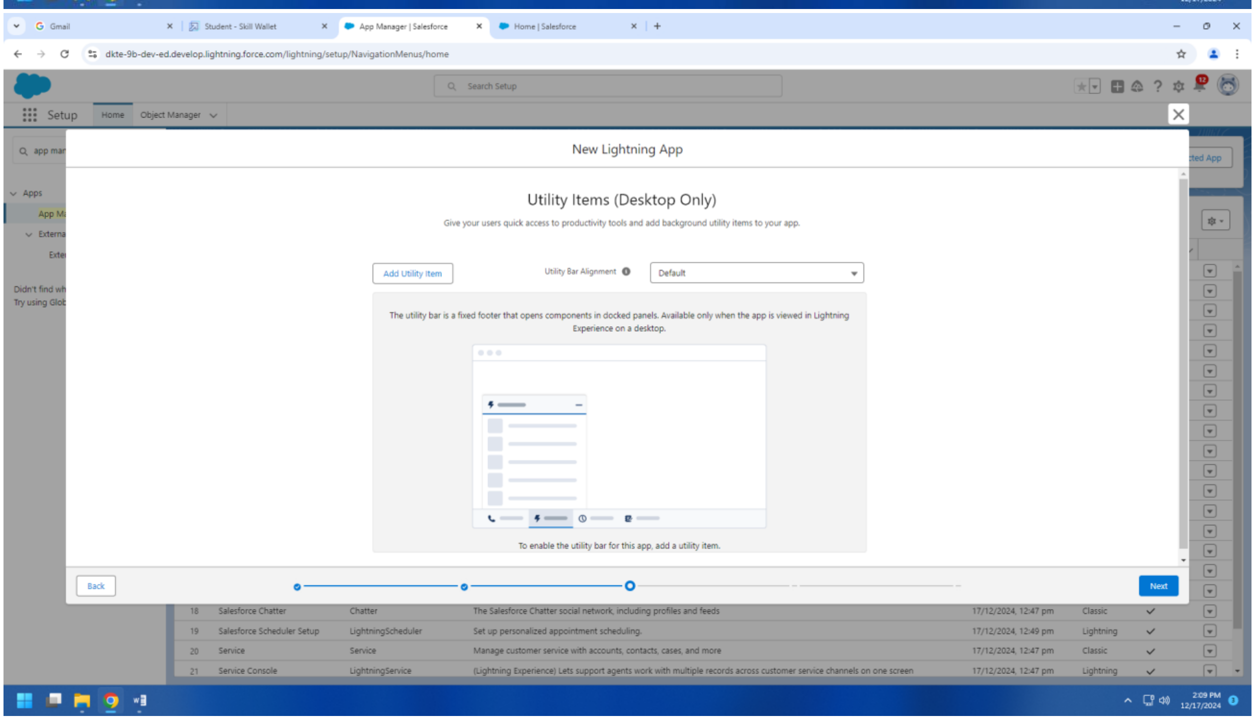
The Lightning App

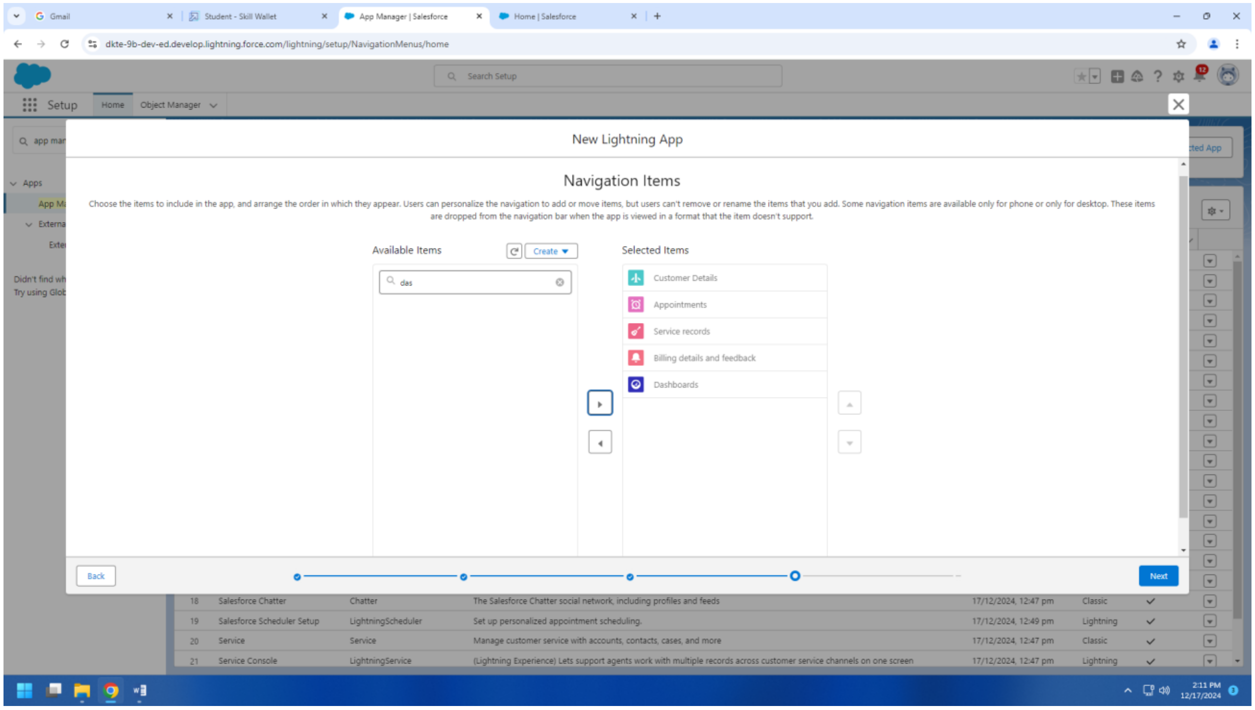
Create a Lightning App

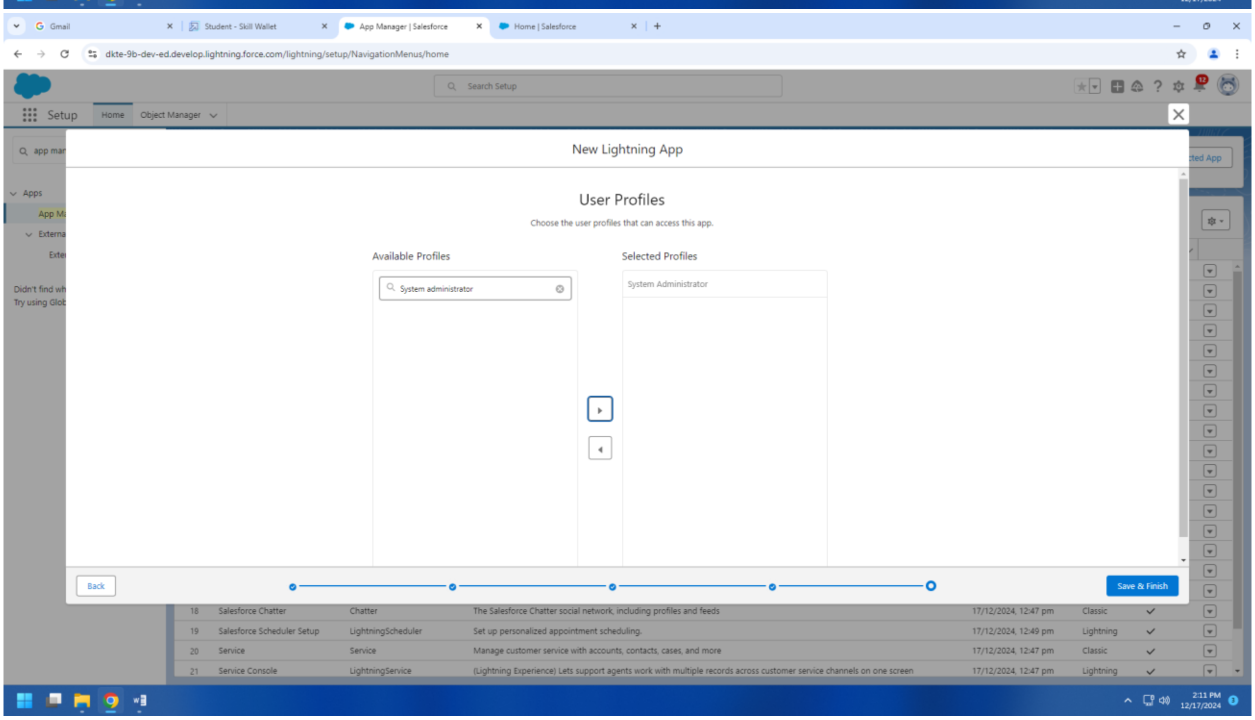





New Lightning App
App Options
Navigation and Form Factor
* Navigation Style
Standard navigation
Console navigation
* Supported Form Factors
Desktop and phone
Desktop
Phone
Setup and Personalization
Setup Experience
Setup (full set of Setup options)
Service Setup
App Personalization Settings
Disable end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

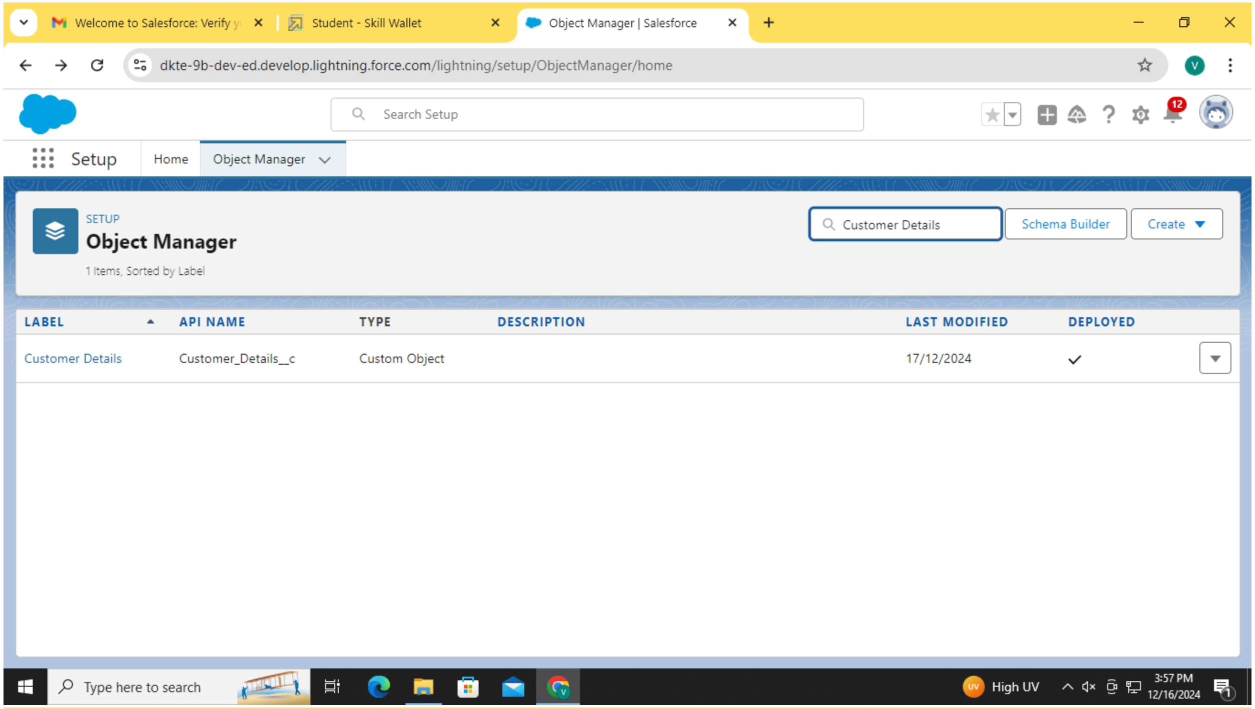

New Lightning App
Utility Items (Desktop Only)
Give your users quick access to productivity tools and add background utility items to your app.
Add Utility Item
Utility Bar Alignment
Default
The utility bar is a fixed footer that opens components in docked panels. Available only when the app is viewed in Lightning Experience on a desktop.
To enable the utility bar for this app, add a utility item.
Back
Next

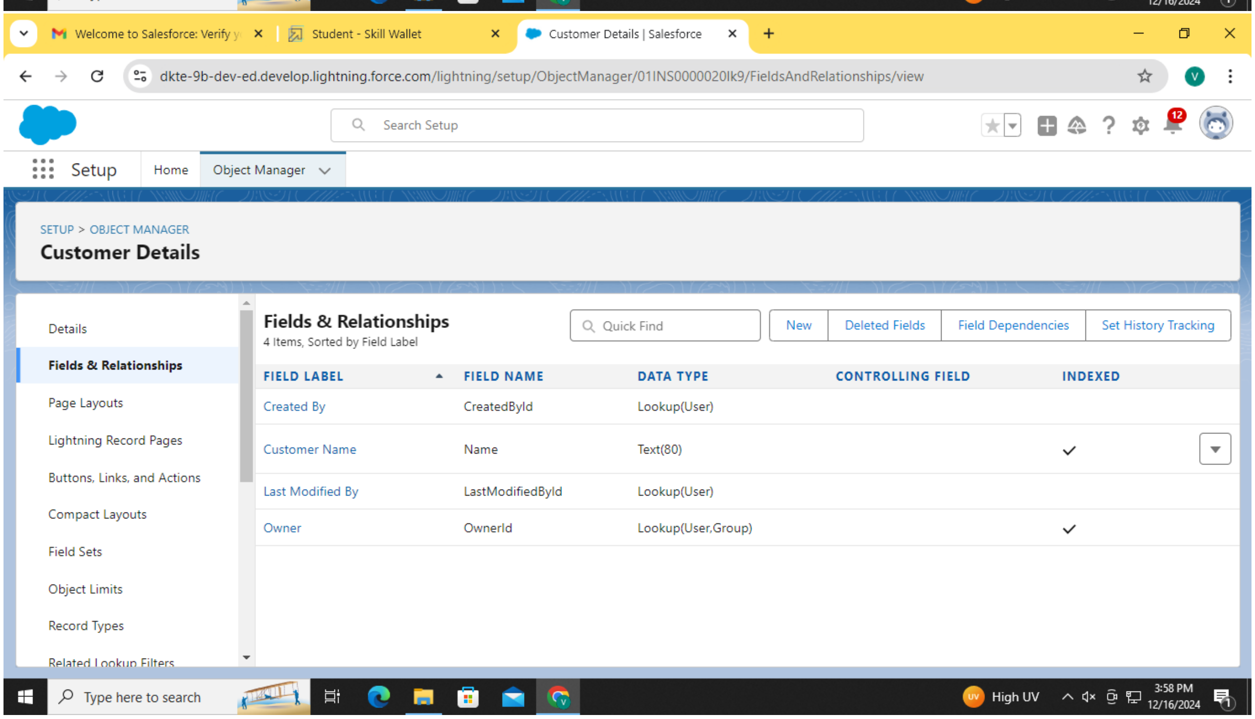

New Lightning App
Navigation Items
Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.
Available Items
Create
Selected Items
Customer Details
Appointments
Service records
Billing details and feedback
Dashboards
Back
Next

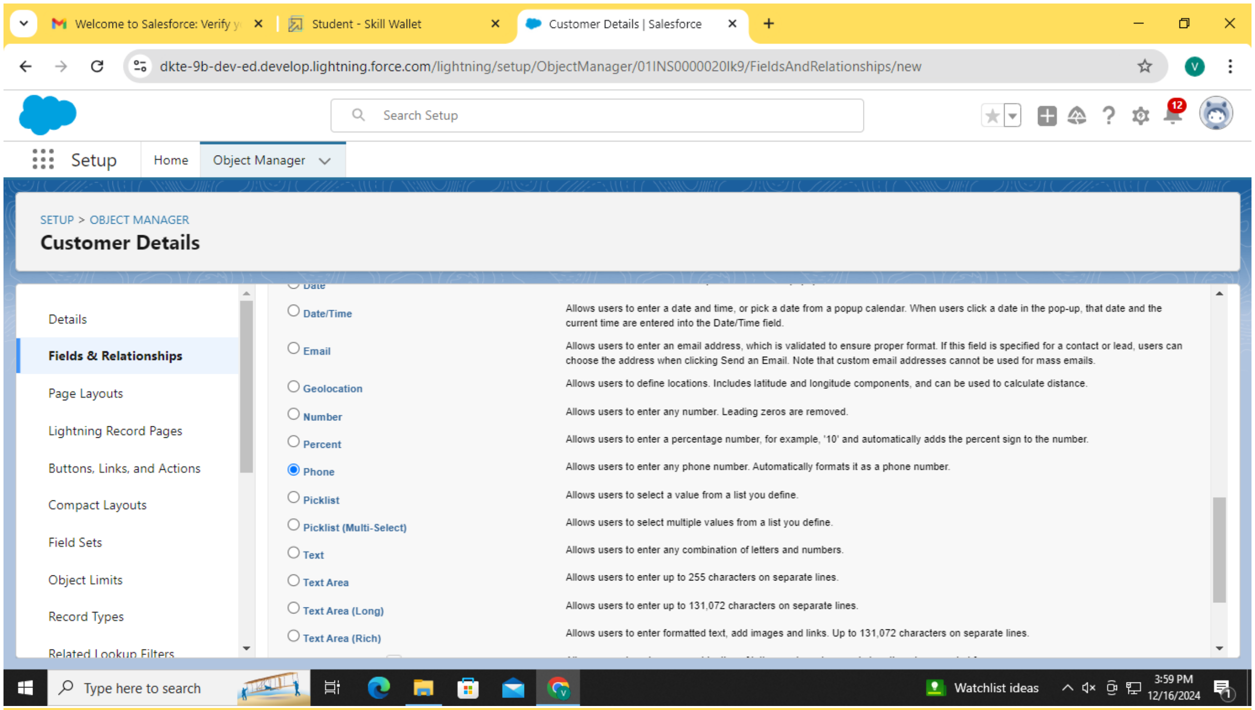

New Lightning App
User Profiles
Choose the user profiles that can access this app.
Available Profiles
System administrator
Selected Profiles
System Administrator
Back
Save & Finish

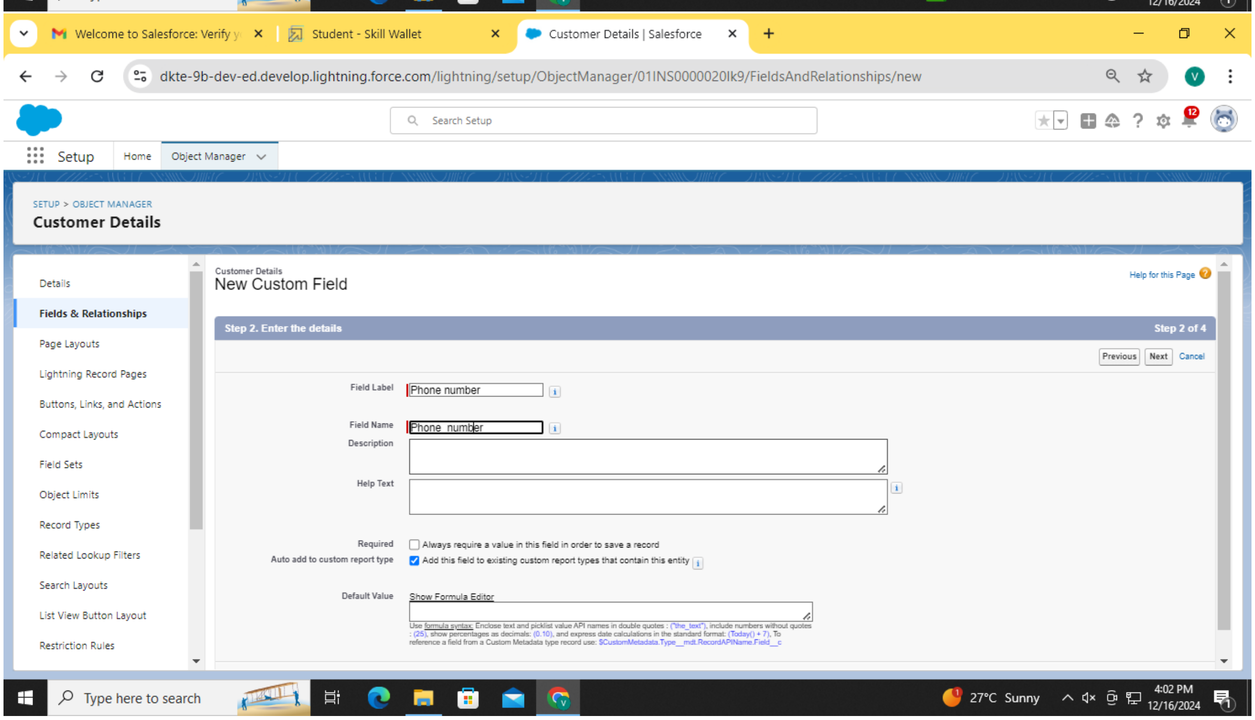
Fields

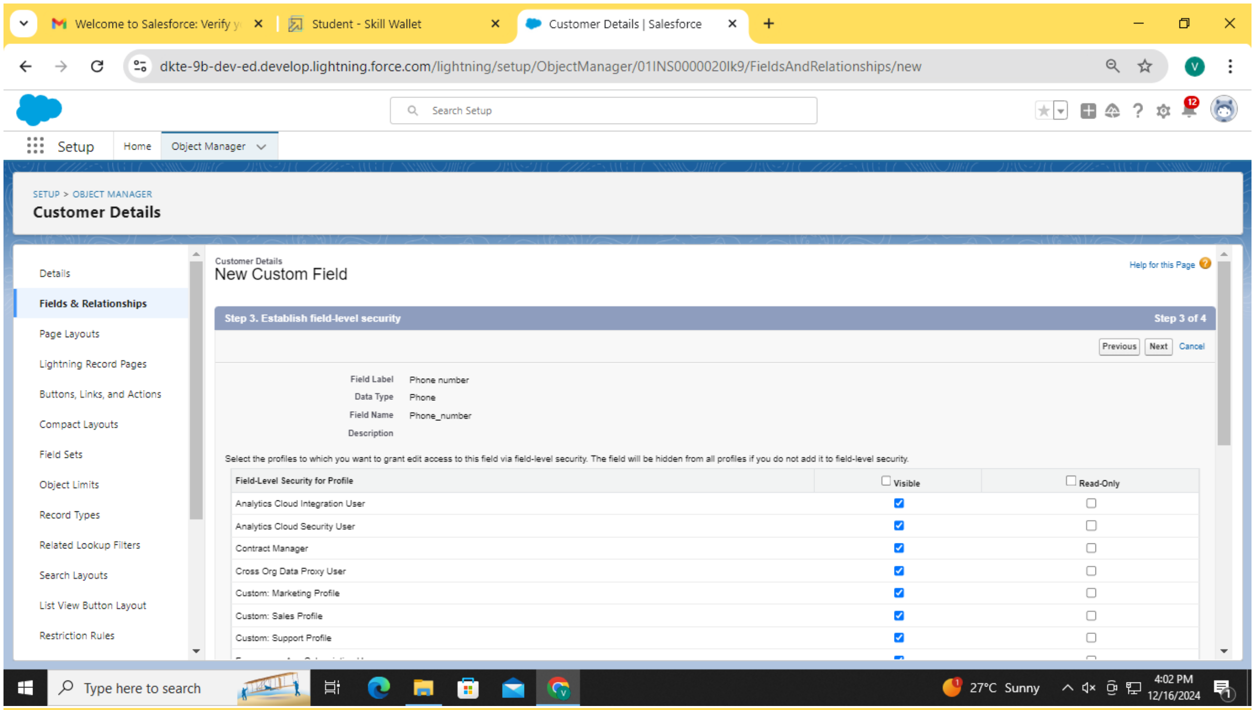
Creation of fields for the Customer Details object

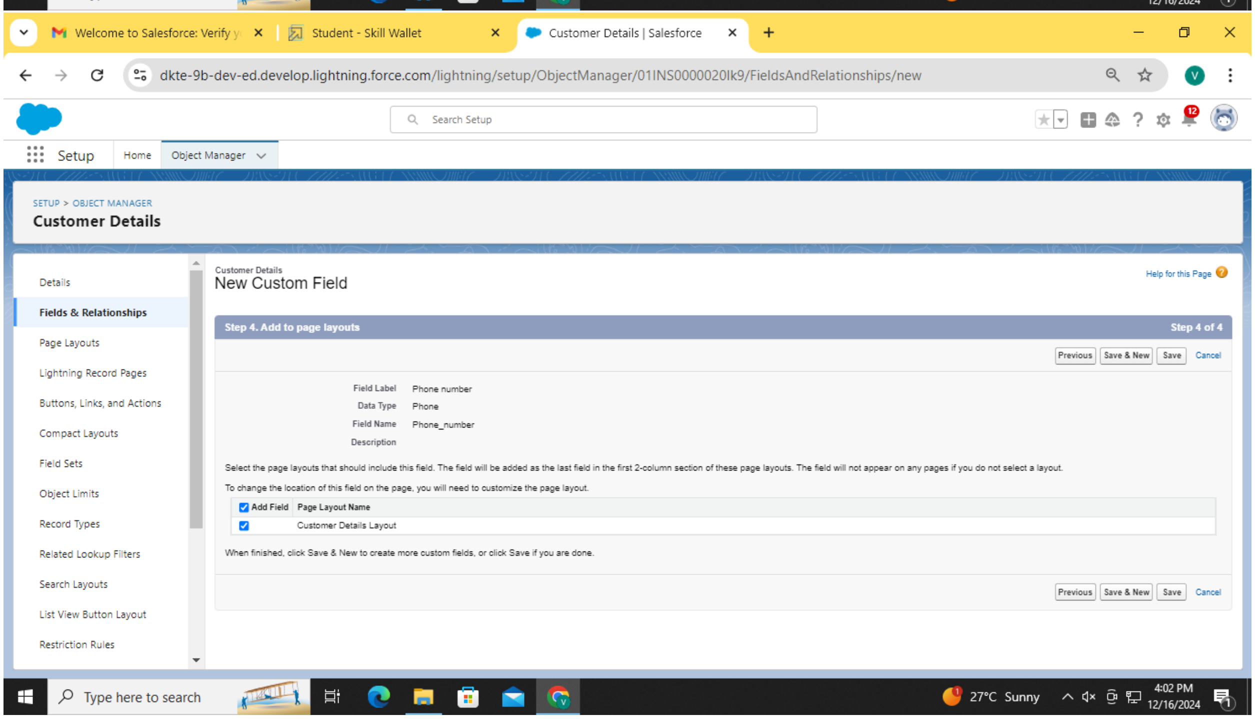


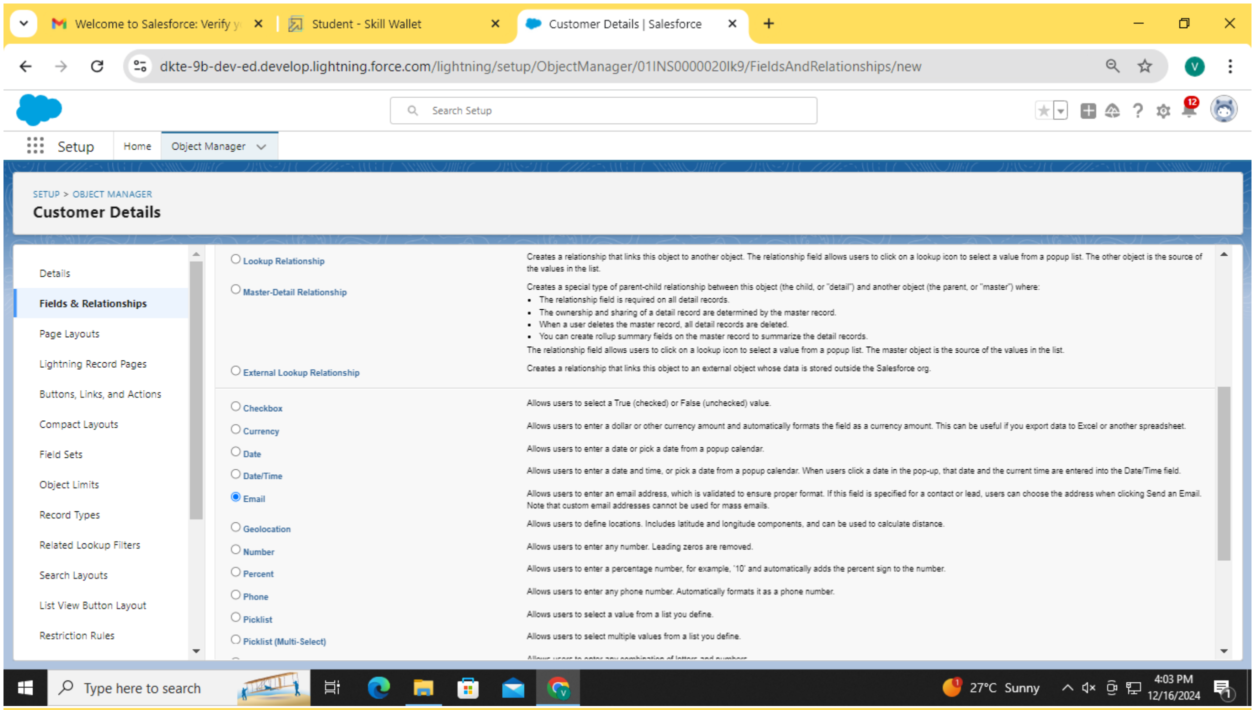


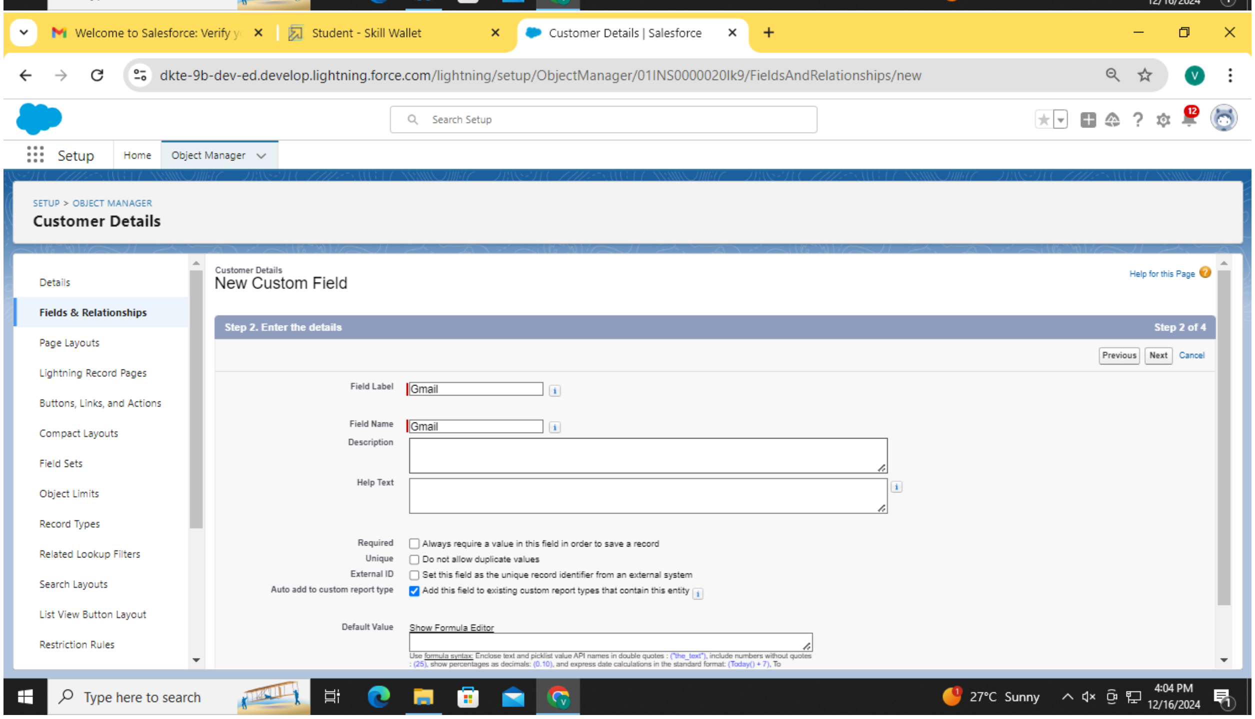

Welcome to Salesforce: Verify y
Student - Skill Wallet
Customer Details | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020Ik9/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Customer Details
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Date/Time
Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Email
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation
Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Number
Allows users to enter any number. Leading zeros are removed.
Percent
Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone
Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist
Allows users to select a value from a list you define.
Picklist (Multi-Select)
Allows users to select multiple values from a list you define.
Text
Allows users to enter any combination of letters and numbers.
Text Area
Allows users to enter up to 255 characters on separate lines.
Text Area (Long)
Allows users to enter up to 131,072 characters on separate lines.
Text Area (Rich)
Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
Type here to search
Watchlist ideas
3:59 PM
12/16/2024

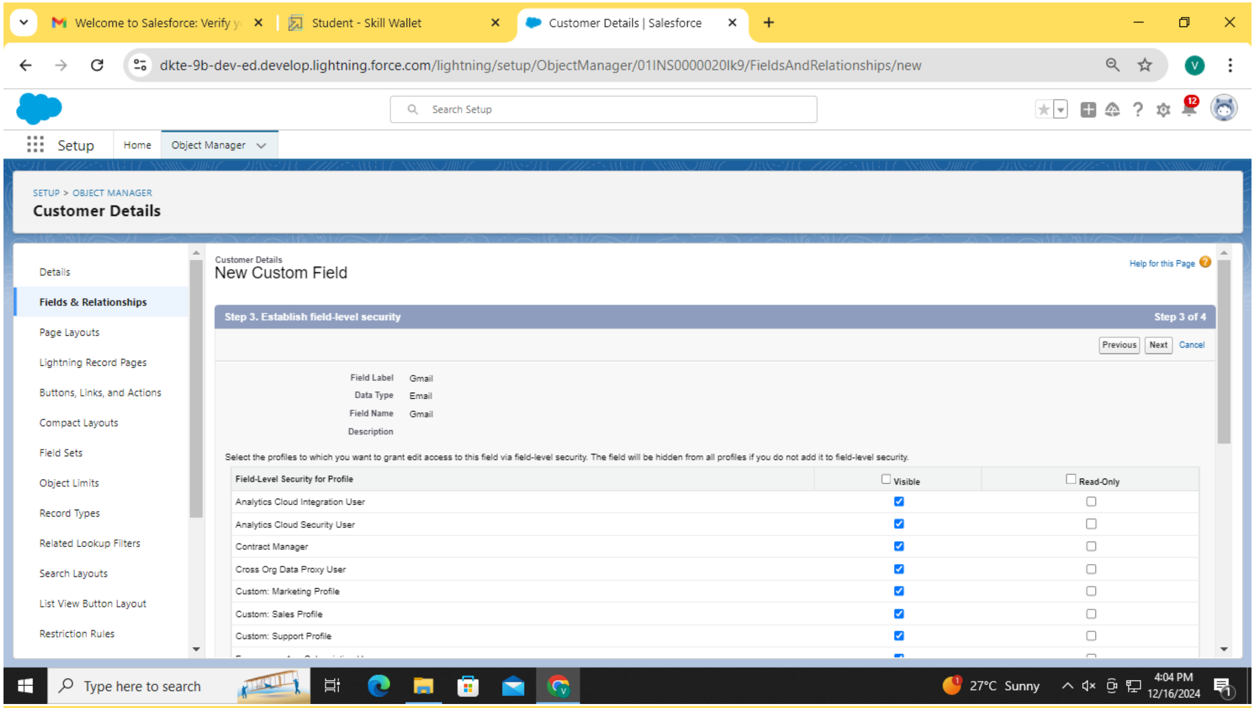

Welcome to Salesforce: Verify y
Student - Skill Wallet
Customer Details | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020Ik9/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Customer Details
Details
Fields & Relationships
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
Customer Details
New Custom Field
Help for this Page
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
Phone number
Field Name
Phone_number
Description
Help Text
Required
Always require a value in this field in order to save a record
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Default Value
Show Formula Editor
Type here to search
27°C Sunny
4:02 PM
12/16/2024

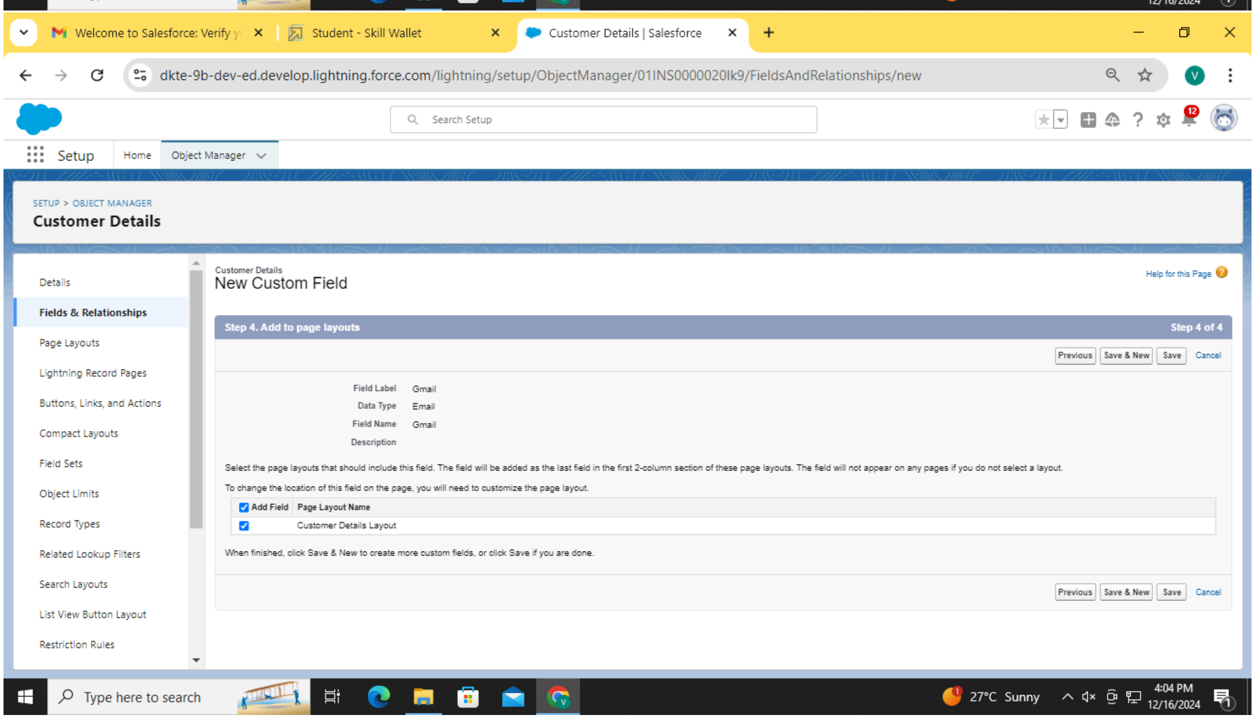

Welcome to Salesforce: Verify y
Student - Skill Wallet
Customer Details | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020Ik9/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Customer Details
Details
Fields & Relationships
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
Customer Details
New Custom Field
Help for this Page
Step 3. Establish field-level security
Step 3 of 4
Previous
Next
Cancel
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
Analytics Cloud Security User
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Type here to search
27°C Sunny
4:02 PM
12/16/2024


Welcome to Salesforce: Verify y
Student - Skill Wallet
Customer Details | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020Ik9/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Customer Details
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
Customer Details
New Custom Field
Help for this Page
Step 4. Add to page layouts
Step 4 of 4
Previous
Save & New
Save
Cancel
Field Label Phone number
Data Type Phone
Field Name Phone_number
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.
Type here to search
27°C Sunny
4:02 PM
12/16/2024

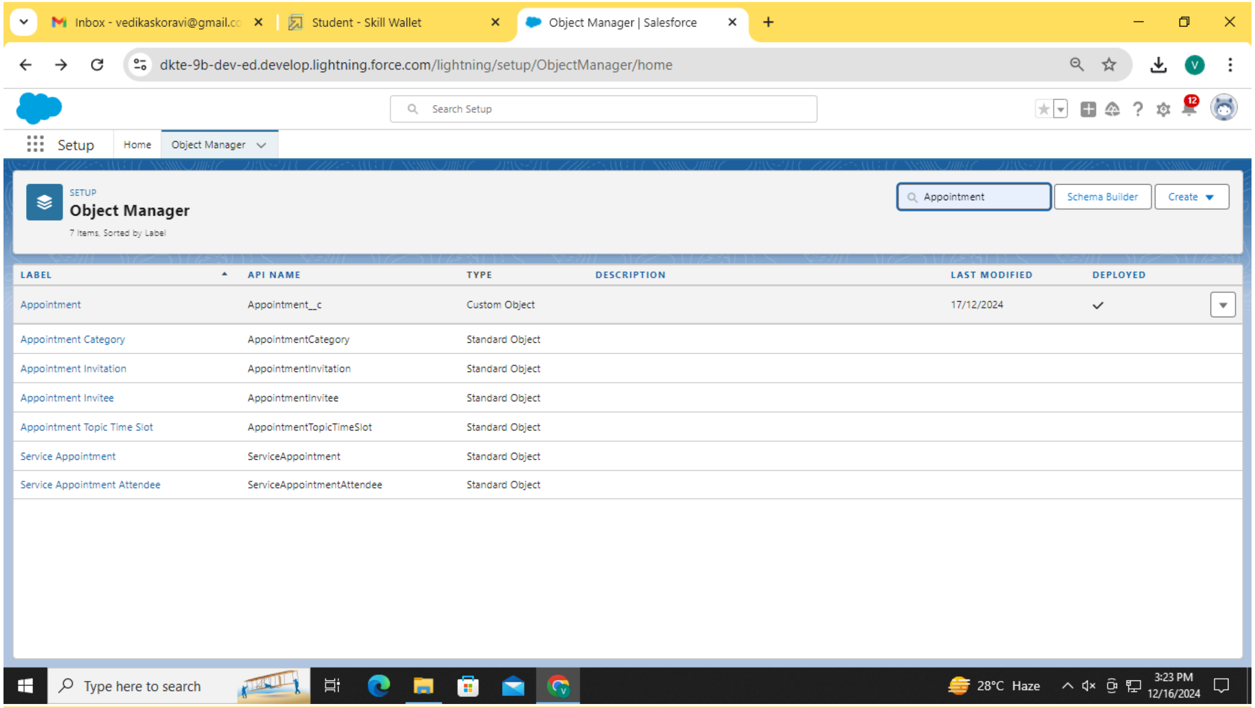

Welcome to Salesforce: Verify y
Student - Skill Wallet
Customer Details | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020Ik9/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Customer Details
Details
Fields & Relationships
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 Relationship
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
Master-Detail Relationship
Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
The relationship field is required on all detail records.
The ownership and sharing of a detail record are determined by the master record.
When a user deletes the master record, all detail records are deleted.
You can create rollup summary fields on the master record to summarize the detail records.
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
Checkbox
Allows users to select a True (checked) or False (unchecked) value.
Currency
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
Date
Allows users to enter a date or pick a date from a popup calendar.
Date/Time
Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Email
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation
Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Number
Allows users to enter any number. Leading zeros are removed.
Percent
Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
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.
Type here to search
27°C Sunny
4:03 PM
12/16/2024

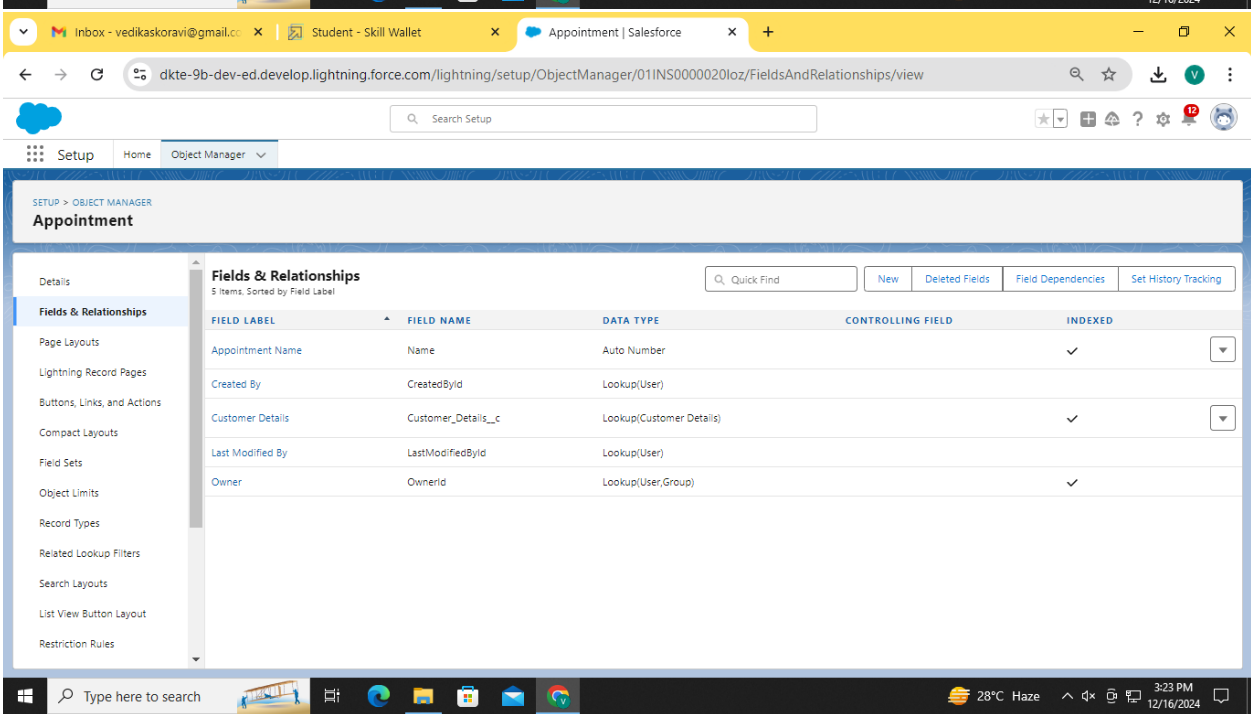

Welcome to Salesforce: Verify y
Student - Skill Wallet
Customer Details | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020Ik9/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Customer Details
Details
Fields & Relationships
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
Customer Details
New Custom Field
Help for this Page
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
Gmail
Field Name
Gmail
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
Type here to search
27°C Sunny
4:04 PM
12/16/2024

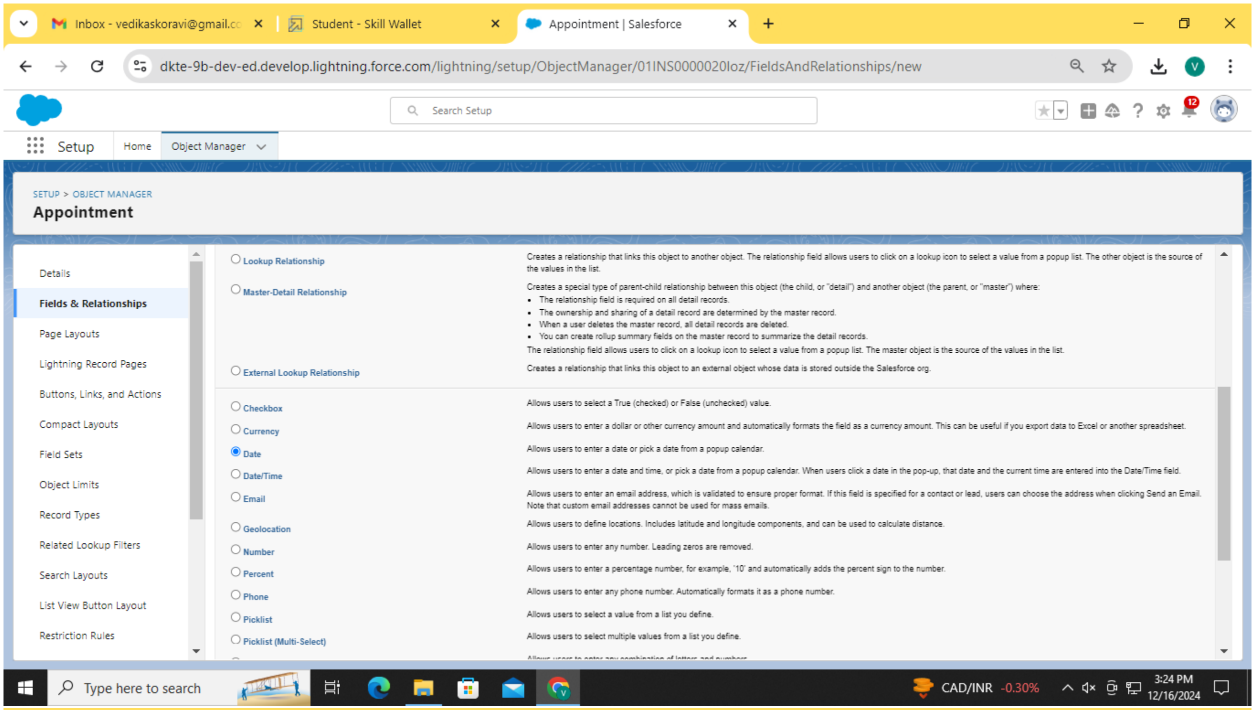

Welcome to Salesforce: Verify y
Student - Skill Wallet
Customer Details | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020Ik9/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Customer Details
Details
Fields & Relationships
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
Customer Details
New Custom Field
Help for this Page
Step 3. Establish field-level security
Step 3 of 4
Previous
Next
Cancel
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
Analytics Cloud Security User
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Type here to search
27°C Sunny
4:04 PM
12/16/2024

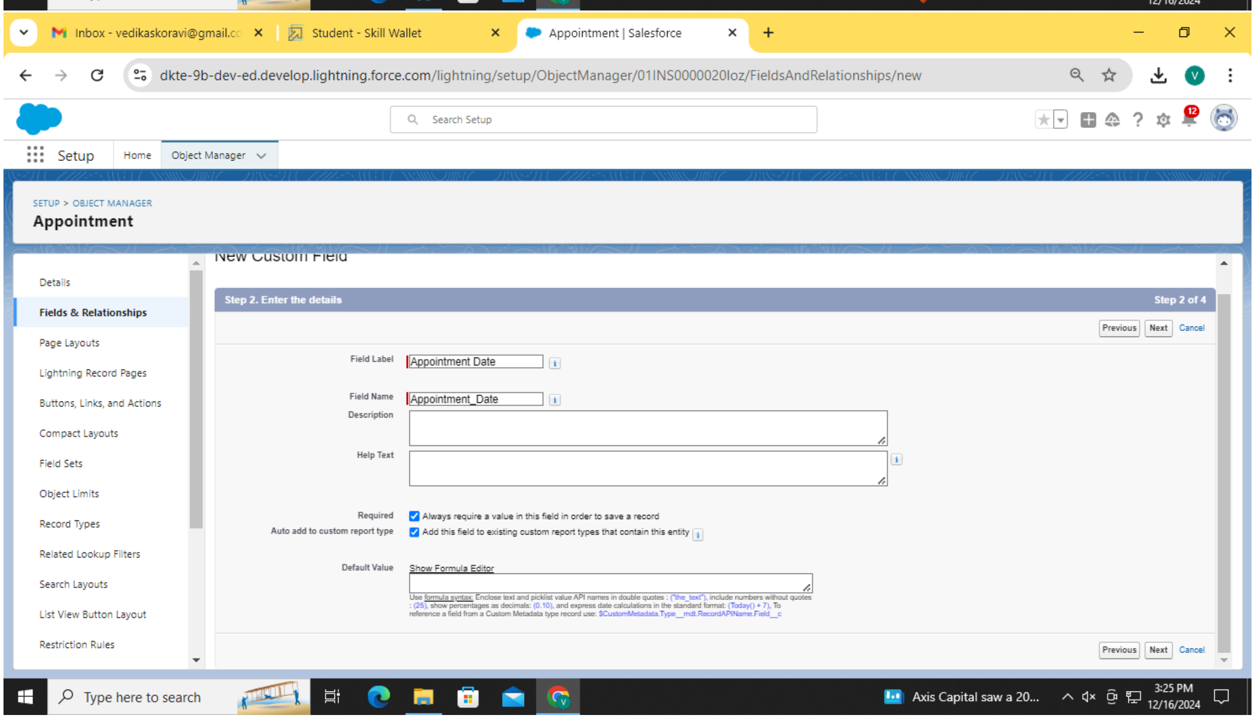

Welcome to Salesforce: Verify y
Student - Skill Wallet
Customer Details | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020Ik9/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Customer Details
Details
Fields & Relationships
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
Customer Details
New Custom Field
Help for this Page
Step 4. Add to page layouts
Step 4 of 4
Previous
Save & New
Save
Cancel
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.
Type here to search
27°C Sunny
4:04 PM
12/16/2024

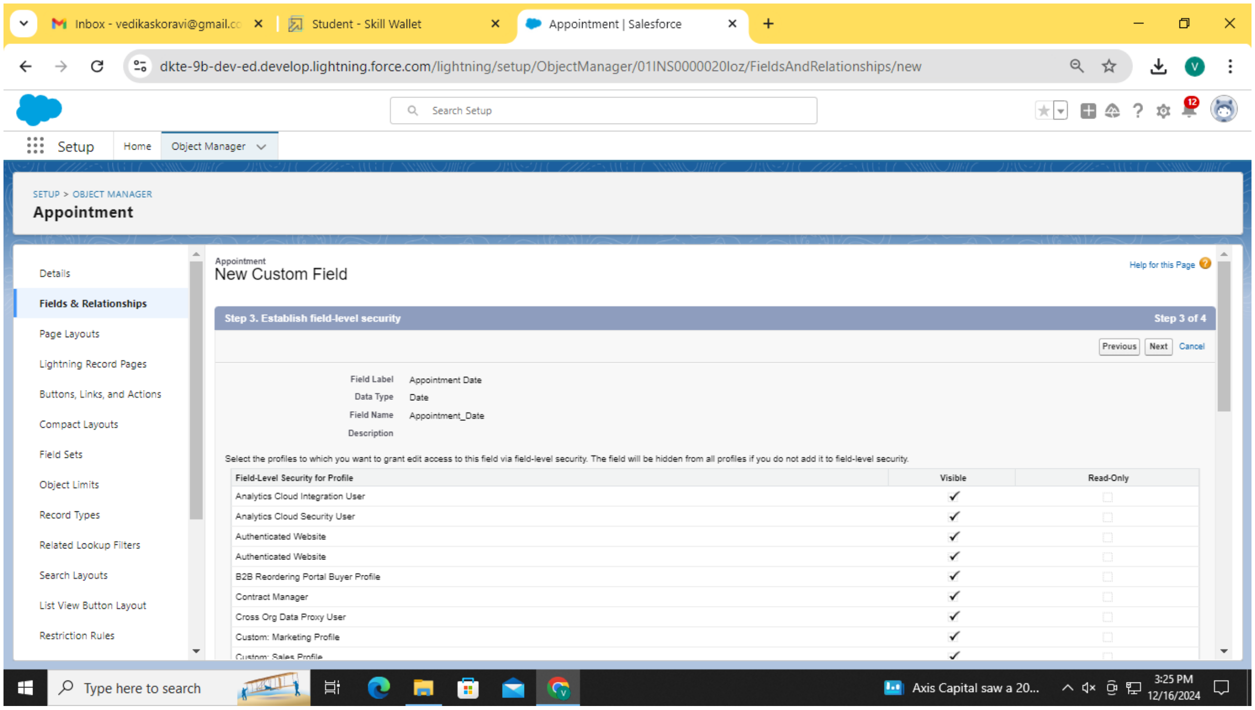
Creation of Lookup Fields

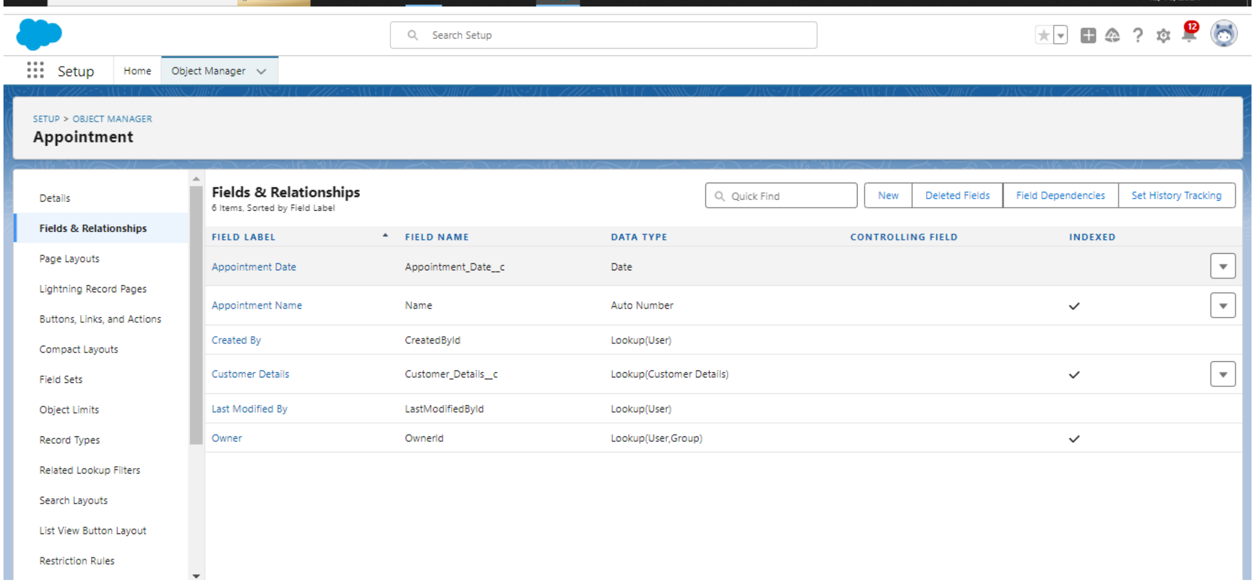


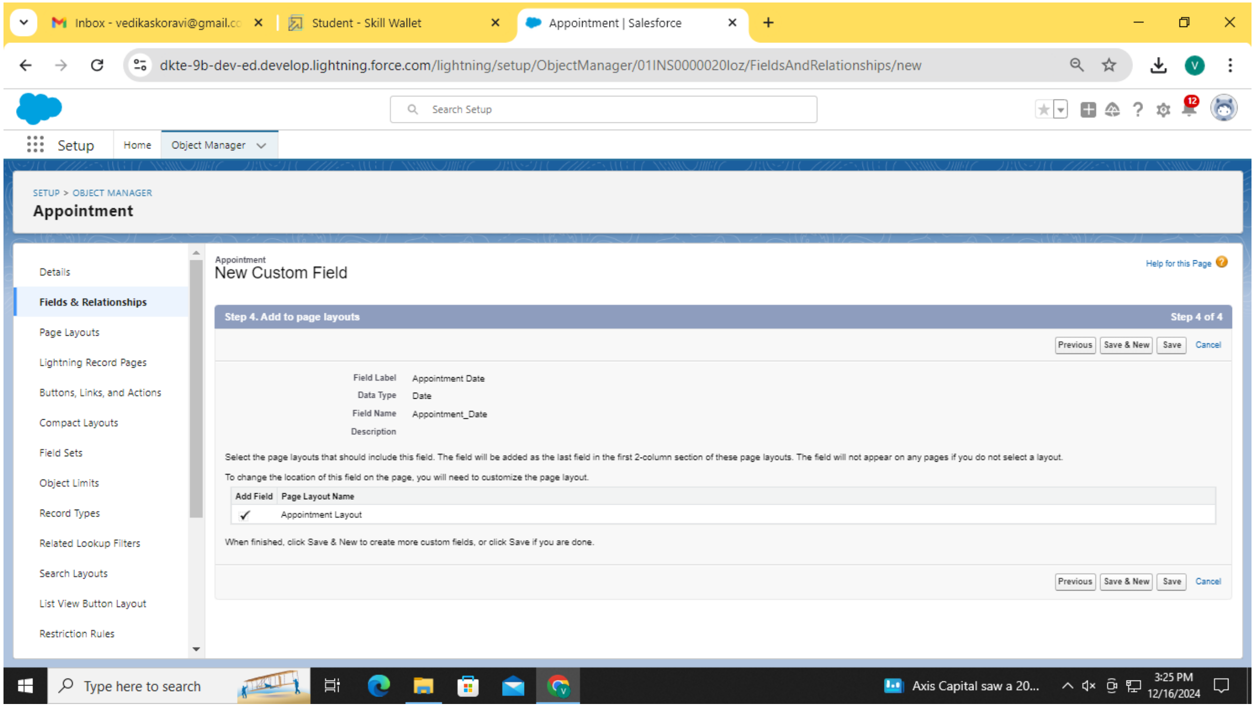


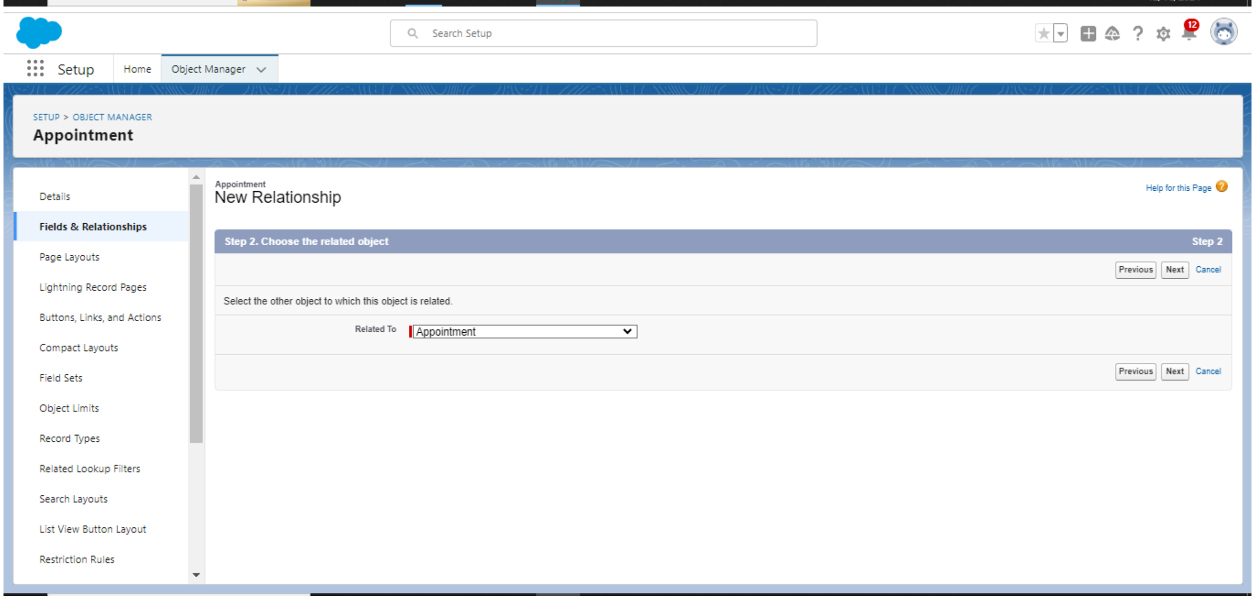

Inbox - vedikaskoravi@gmail.com
Student - Skill Wallet
Appointment | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020loz/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Lookup Relationship
Master-Detail Relationship
External Lookup Relationship
Checkbox
Currency
Date
Date/Time
Email
Geolocation
Number
Percent
Phone
Picklist
Picklist (Multi-Select)
Allows users to select a True (checked) or False (unchecked) value.
Allows users to enter a date or pick a date from a popup calendar.
Allows users to enter any number. Leading zeros are removed.
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.
Type here to search
CAD/INR -0.30%
3:24 PM
12/16/2024

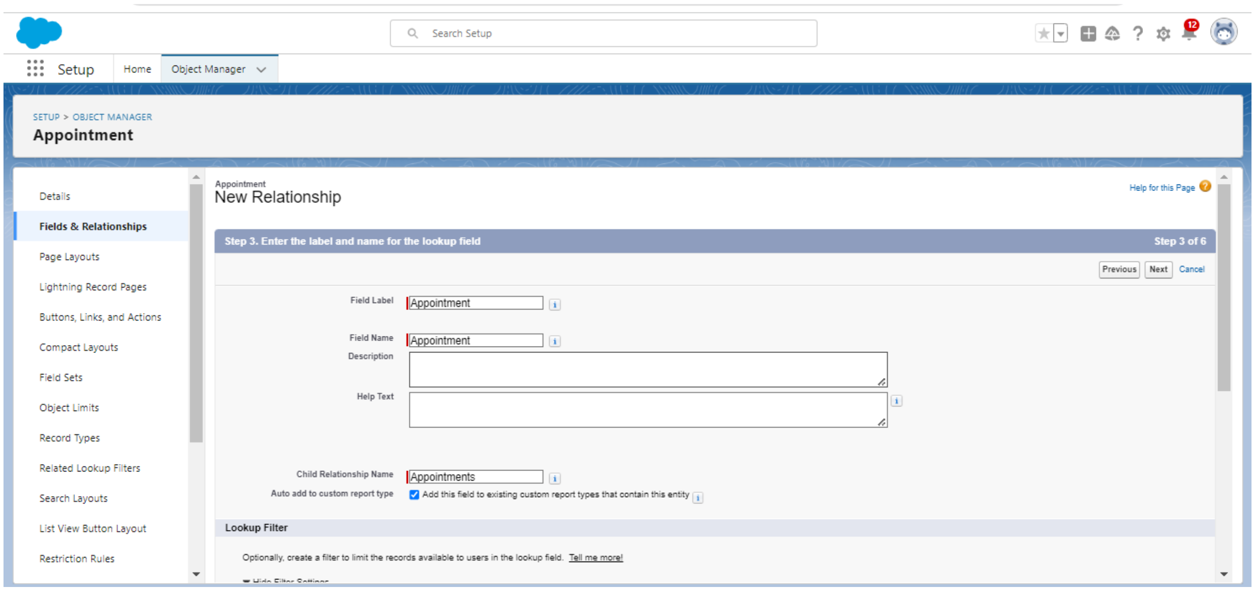

Inbox - vedikaskoravi@gmail.com
Student - Skill Wallet
Appointment | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020loz/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
New Custom Field
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
Appointment Date
Field Name
Appointment_Date
Description
Help Text
Required
Always require a value in this field in order to save a record
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Default Value
Show Formula Editor
Type here to search
Axis Capital saw a 20...
3:25 PM
12/16/2024

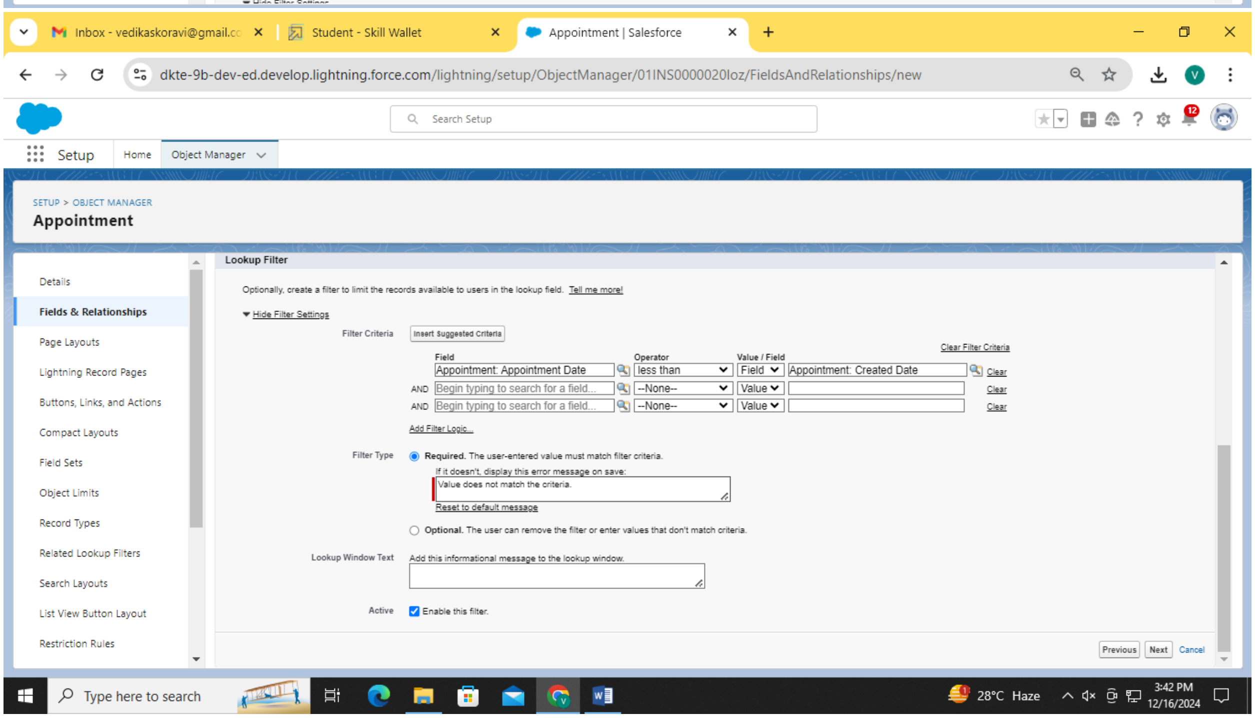

Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Appointment | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020loz/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Appointment
New Custom Field
Help for this Page
Step 3. Establish field-level security
Step 3 of 4
Previous
Next
Cancel
Field Label Appointment Date
Data Type Date
Field Name Appointment_Date
Description
Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.
Field-Level Security for Profile
Visible
Read-Only
Analytics Cloud Integration User
Analytics Cloud Security User
Authenticated Website
Authenticated Website
B2B Reordering Portal Buyer Profile
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Type here to search
Axis Capital saw a 20...
3:25 PM
12/16/2024

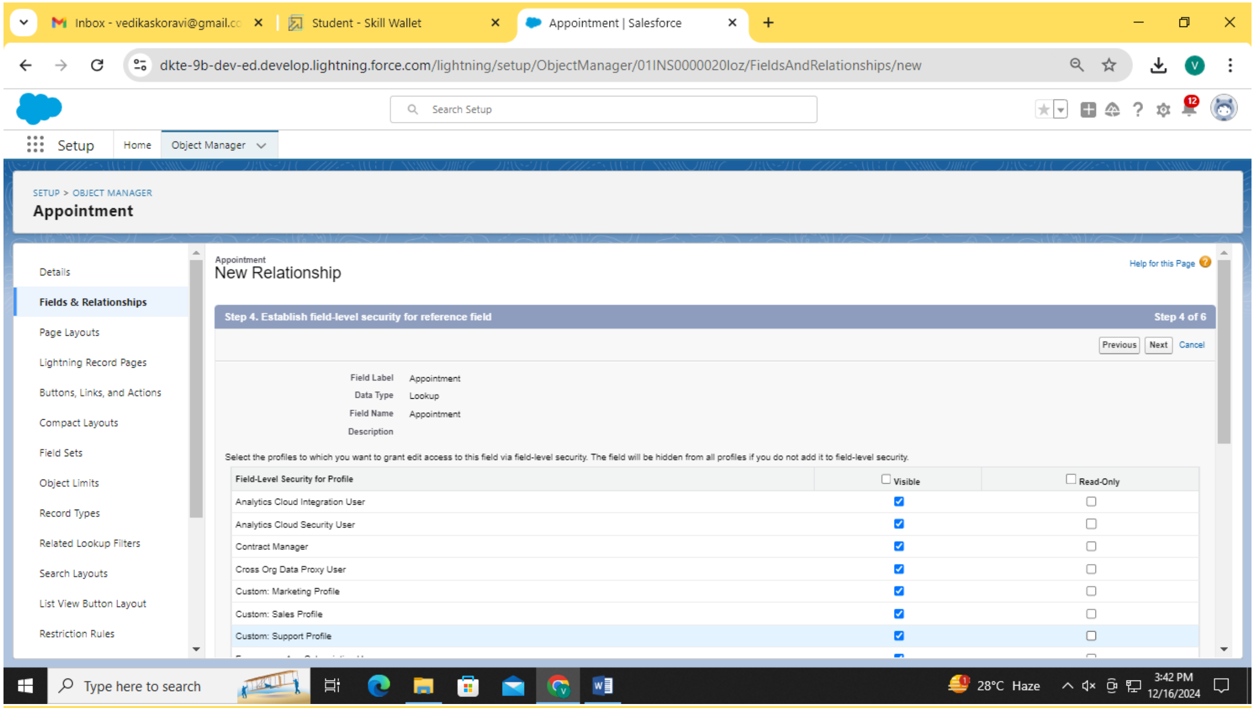
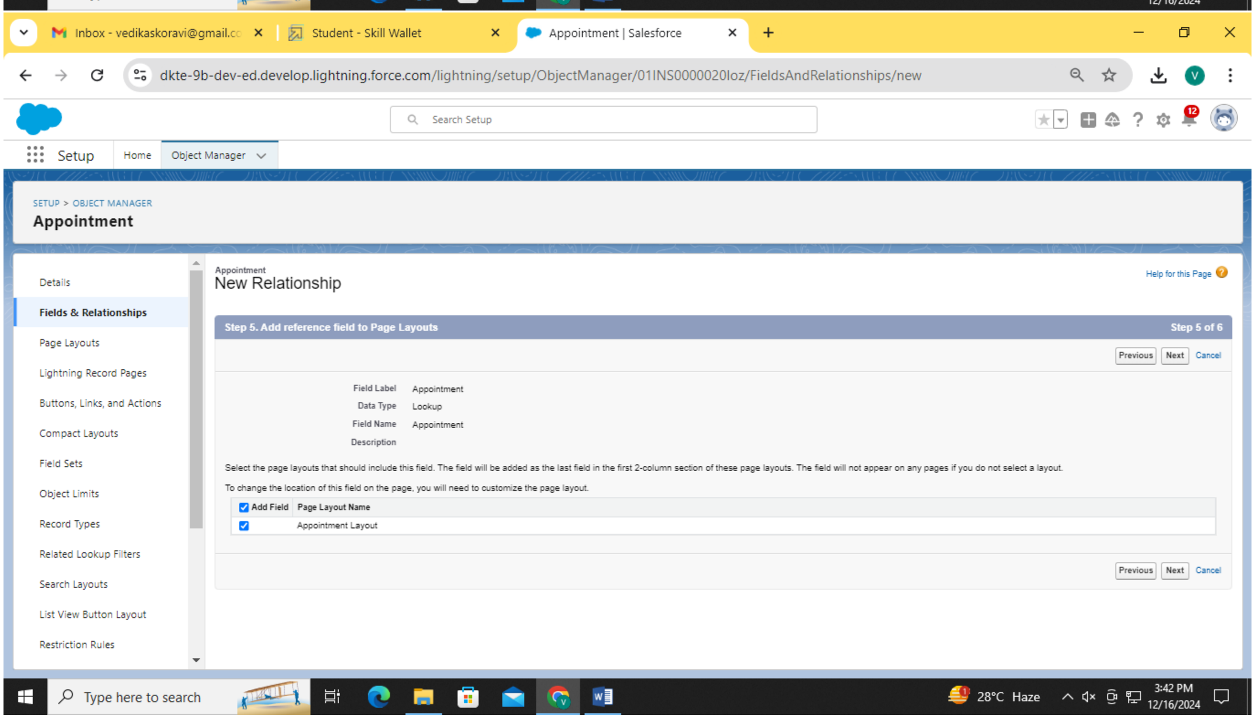

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Fields & Relationships
6 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Appointment Date
Appointment_Date__c
Date
Appointment Name
Name
Auto Number
Created By
CreatedById
Lookup(User)
Customer Details
Customer_Details__c
Lookup(Customer Details)
Last Modified By
LastModifiedById
Lookup(User)
Owner
OwnerId
Lookup(User,Group)

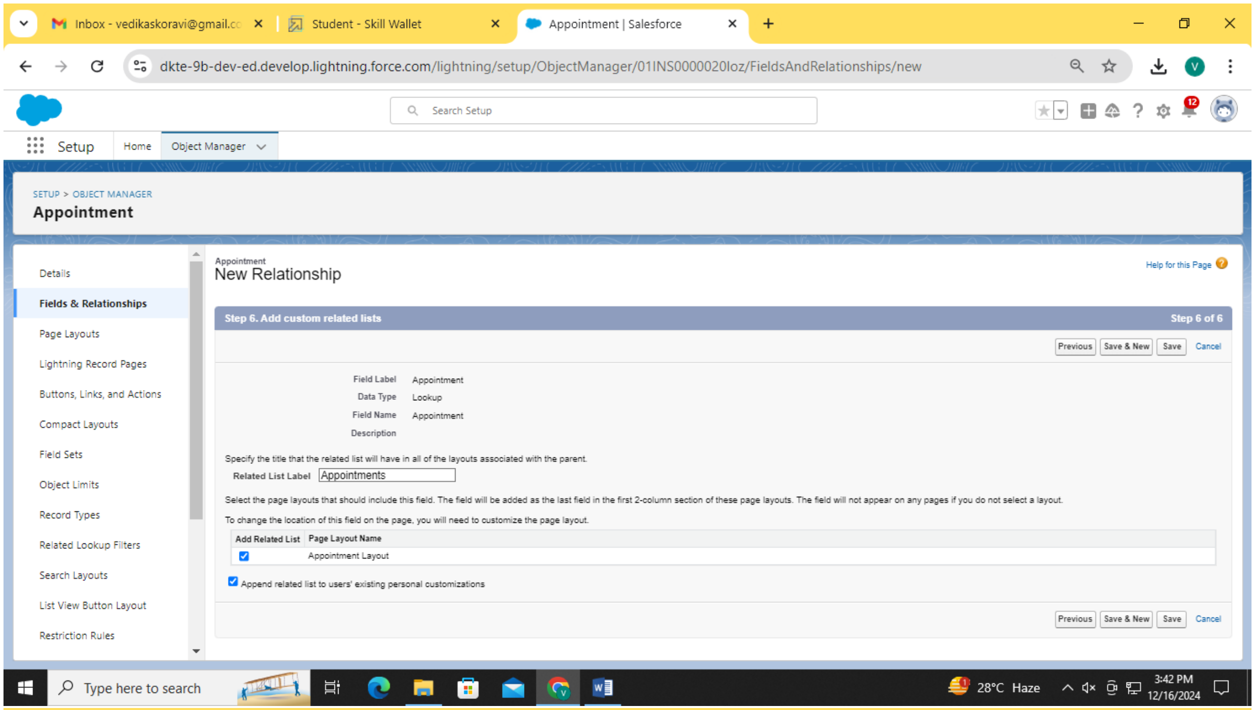

Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Appointment | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020loz/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Appointment
New Custom Field
Help for this Page
Step 4. Add to page layouts
Step 4 of 4
Previous
Save & New
Save
Cancel
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.
To change the location of this field on the page, you will need to customize the page layout.
Add Field
Page Layout Name
Appointment Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.
Type here to search
Axis Capital saw a 20...
3:25 PM
12/16/2024

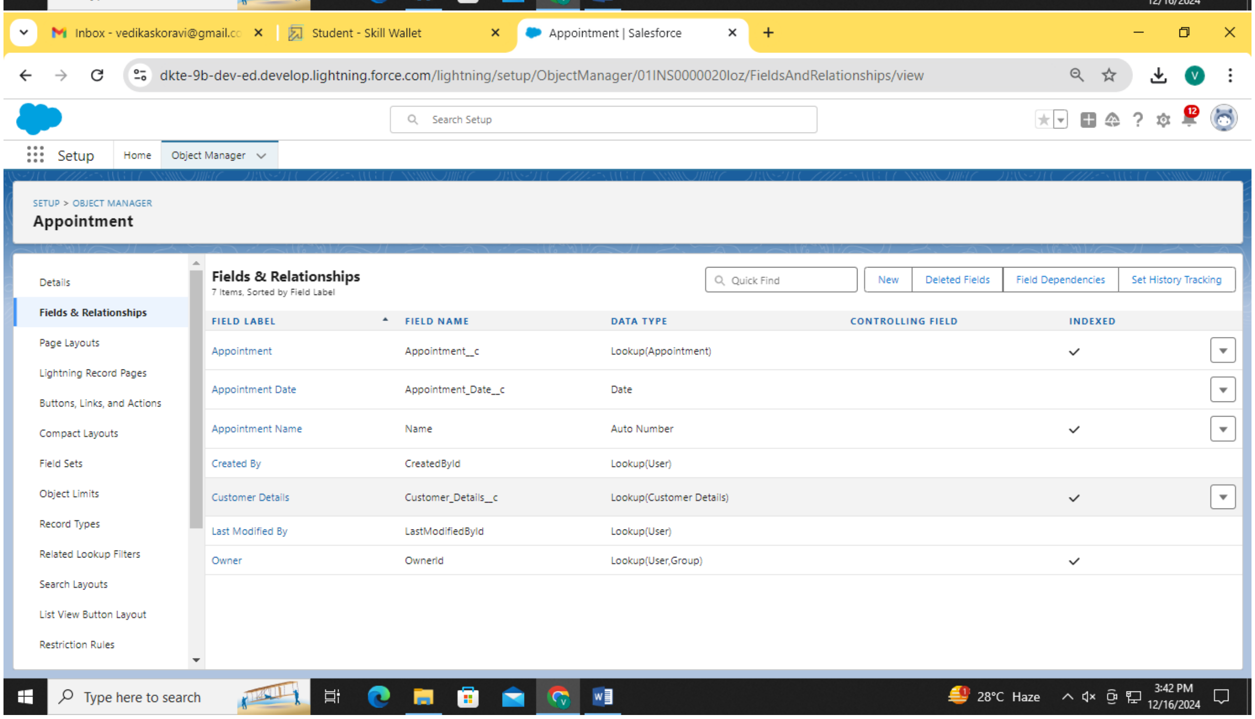

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Appointment
New Relationship
Help for this Page
Step 2. Choose the related object
Step 2
Previous
Next
Cancel
Select the other object to which this object is related.
Related To
Appointment

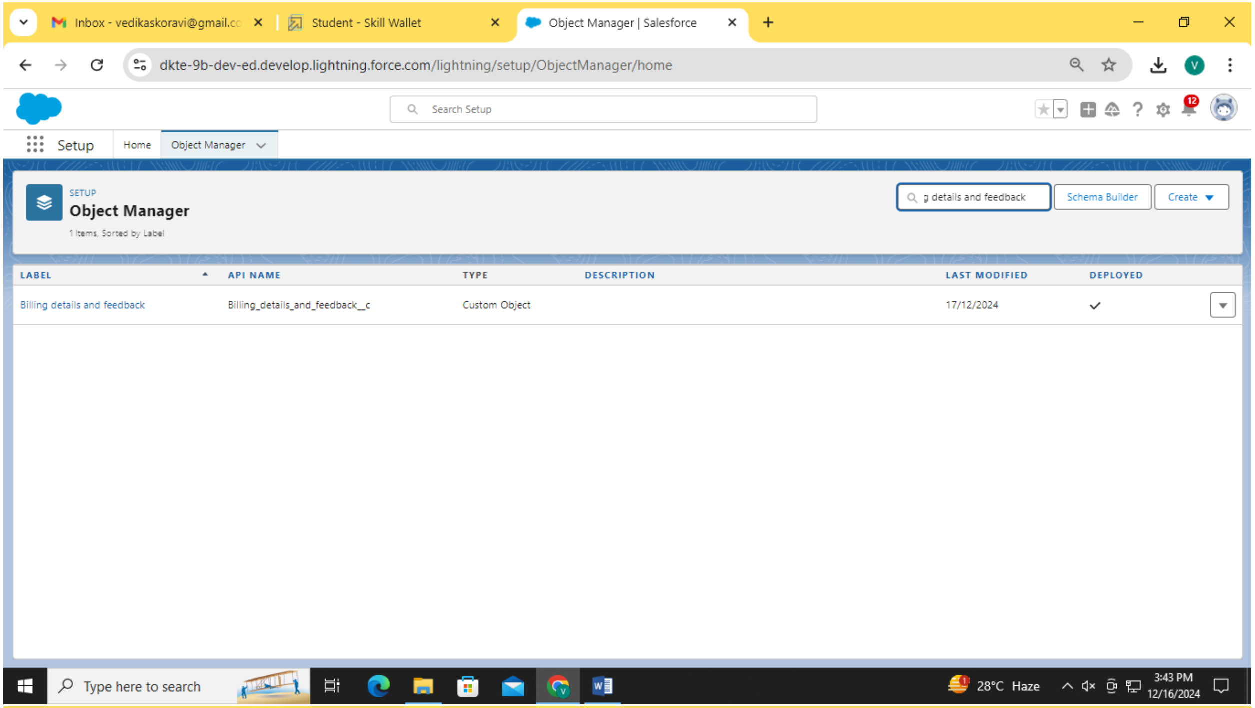

Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Appointment
New Relationship
Help for this Page
Step 3. Enter the label and name for the lookup field
Step 3 of 6
Previous
Next
Cancel
Field Label
Appointment
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
Lookup Filter
Optionally, create a filter to limit the records available to users in the lookup field. Tell me more!

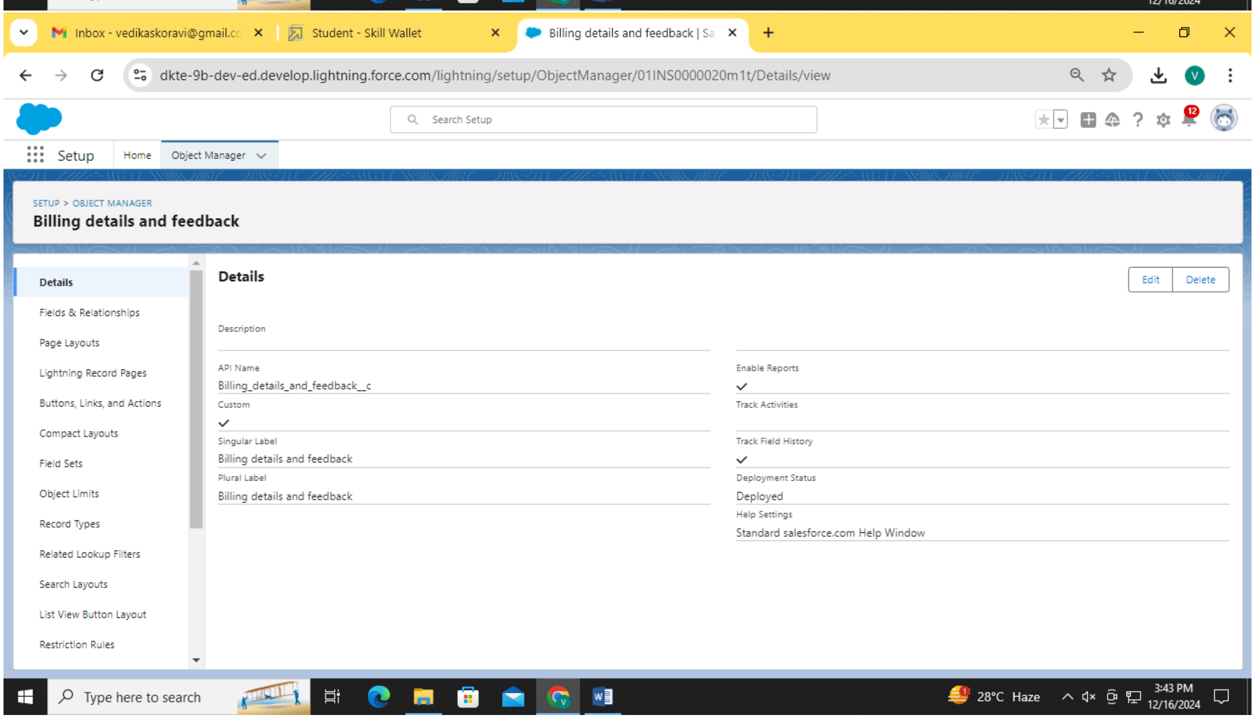

Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Appointment | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020loz/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Lookup Filter
Optionally, create a filter to limit the records available to users in the lookup field. Tell me more!
Hide Filter Settings
Filter Criteria
Insert Suggested Criteria
Clear Filter Criteria
Field
Operator
Value / Field
Appointment: Appointment Date
less than
Field
Appointment: Created Date
Clear
AND
Begin typing to search for a field...
--None--
Value
Clear
AND
Begin typing to search for a field...
--None--
Value
Clear
Add Filter Logic...
Filter Type
Required. The user-entered value must match filter criteria.
If it doesn't, display this error message on save:
Value does not 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
28°C Haze
3:42 PM
12/16/2024

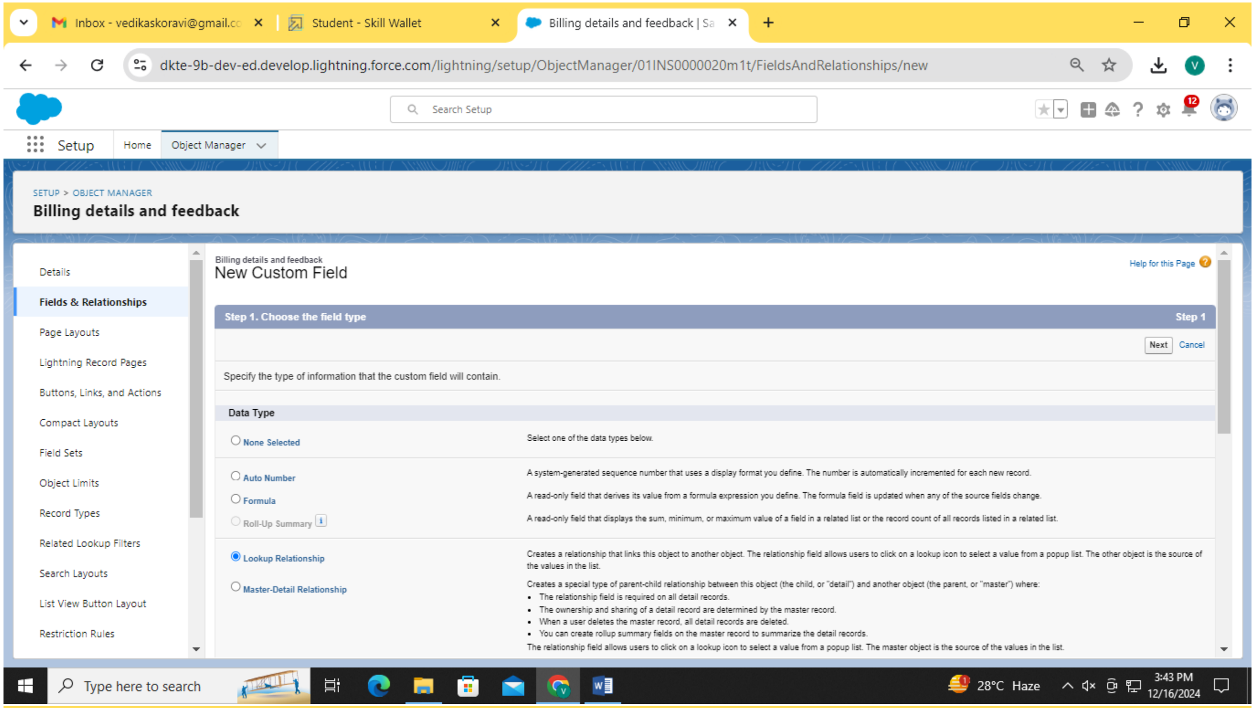

dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020loz/FieldsAndRelationships/new
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Appointment
New Relationship
Help for this Page
Step 4. Establish field-level security for reference field
Step 4 of 6
Previous
Next
Cancel
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
Analytics Cloud Security User
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Type here to search
28°C Haze
3:42 PM
12/16/2024

dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020loz/FieldsAndRelationships/new
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Appointment
New Relationship
Help for this Page
Step 5. Add reference field to Page Layouts
Step 5 of 6
Previous
Next
Cancel
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
Appointment Layout
Type here to search
28°C Haze
3:42 PM
12/16/2024


Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Appointment | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020loz/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Appointment
New Relationship
Help for this Page
Step 6. Add custom related lists
Step 6 of 6
Previous
Save & New
Save
Cancel
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
Type here to search
28°C Haze
3:42 PM
12/16/2024

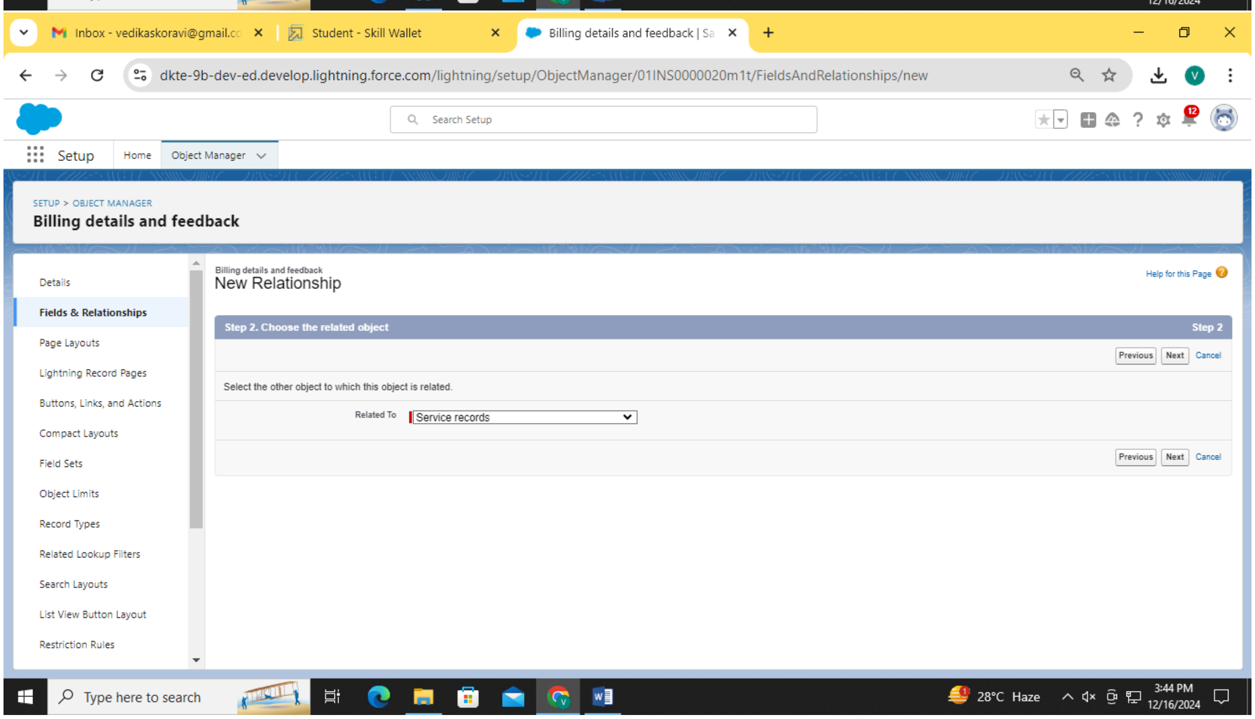

Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Appointment | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020loz/FieldsAndRelationships/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Fields & Relationships
7 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Appointment
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)
Owner
OwnerId
Lookup(User,Group)
Type here to search
28°C Haze
3:42 PM
12/16/2024


Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Object Manager | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home
Search Setup
Setup
Home
Object Manager
SETUP
Object Manager
1 Items, Sorted by Label
g details and feedback
Schema Builder
Create
LABEL
API NAME
TYPE
DESCRIPTION
LAST MODIFIED
DEPLOYED
Billing details and feedback
Billing_details_and_feedback__c
Custom Object
17/12/2024
Type here to search
28°C Haze
3:43 PM
12/16/2024

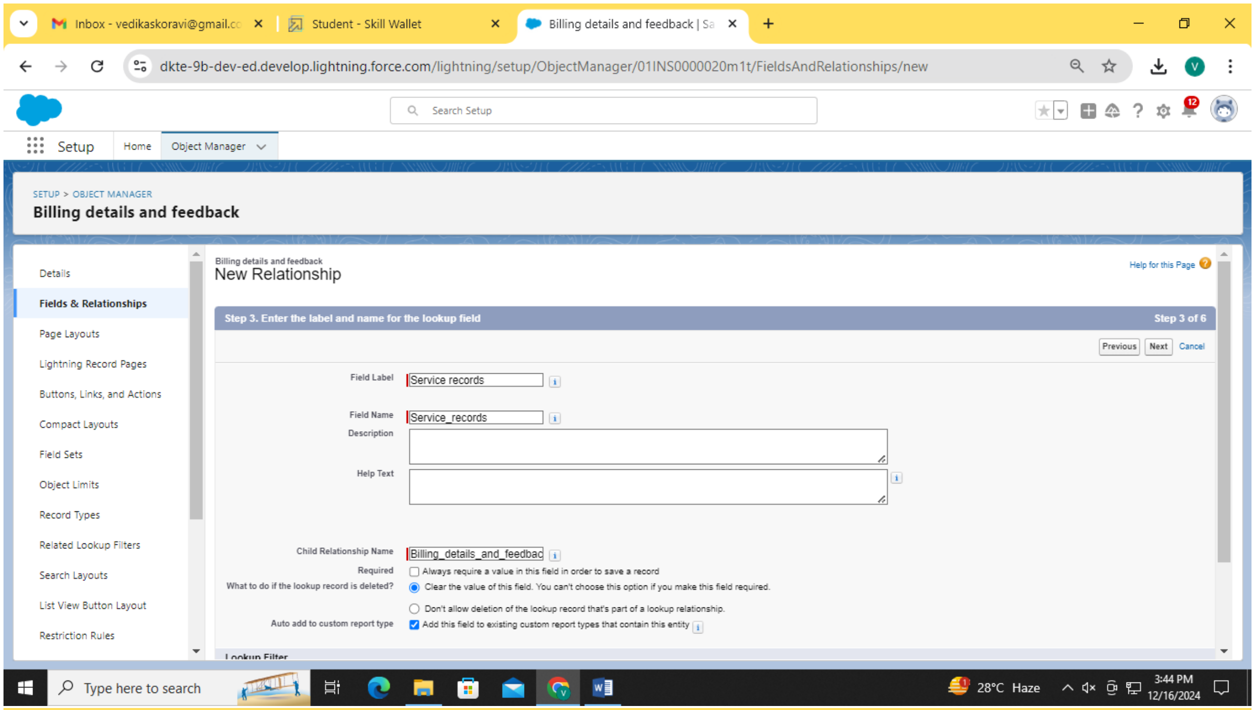

Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Billing details and feedback | Sa
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020m1t/Details/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing details and feedback
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Details
Edit
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
Type here to search
28°C Haze
3:43 PM
12/16/2024

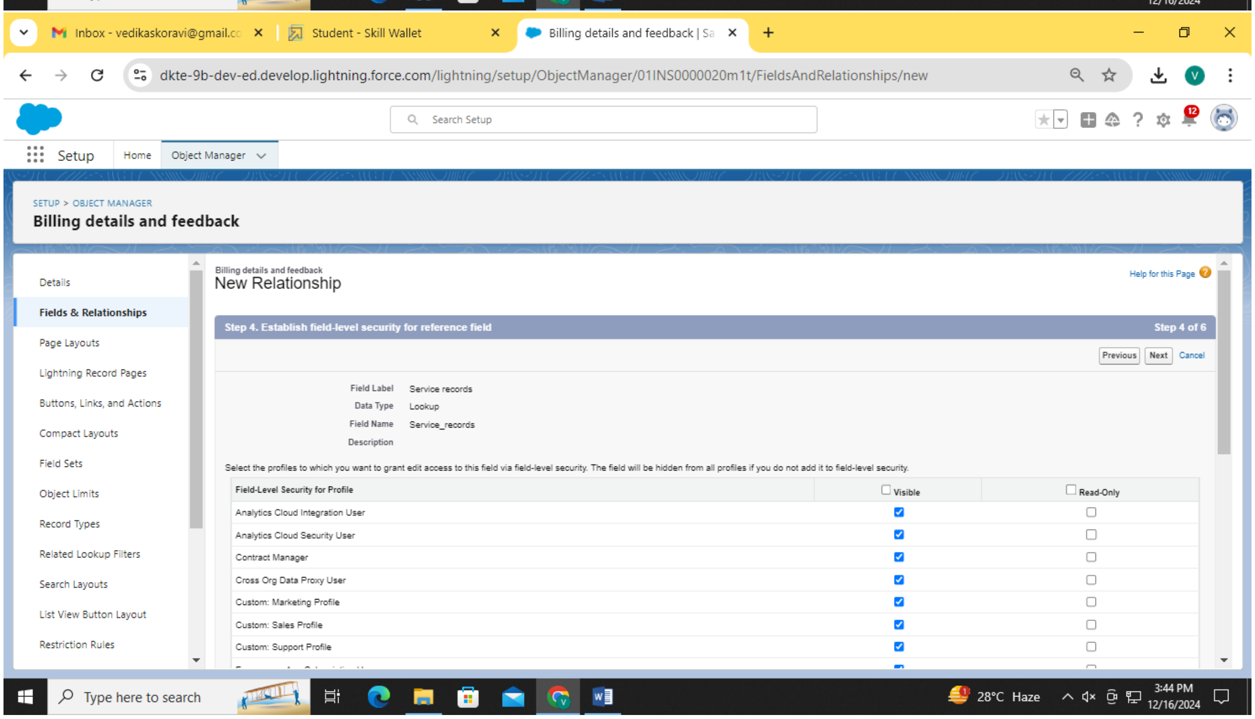


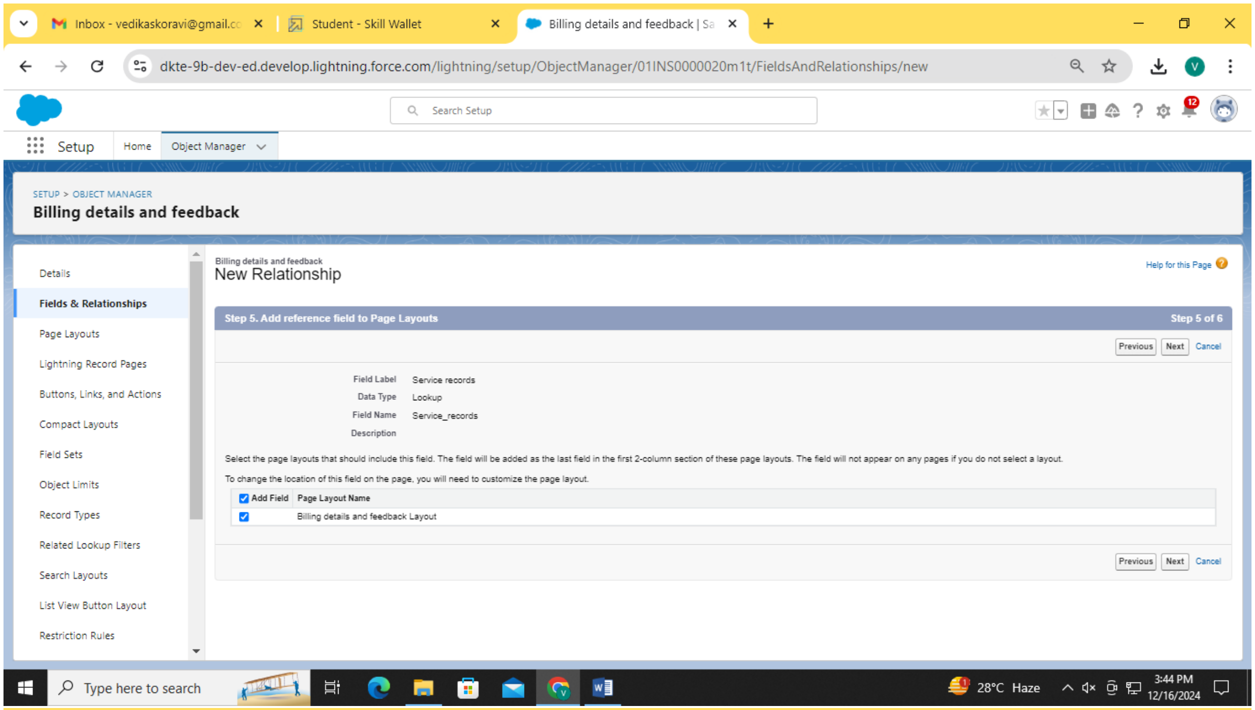
Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Billing details and feedback | Sa
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020m1t/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing details and feedback
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Billing details and feedback
New Custom Field
Help for this Page
Step 1. Choose the field type
Step 1
Next
Cancel
Specify the type of information that the custom field will contain.
Data Type
None Selected
Select one of the data types below.
Auto Number
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
Formula
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
Roll-Up Summary
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
Lookup Relationship
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
Master-Detail Relationship
Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
The relationship field is required on all detail records.
The ownership and sharing of a detail record are determined by the master record.
When a user deletes the master record, all detail records are deleted.
You can create rollup summary fields on the master record to summarize the detail records.
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
Type here to search
28°C Haze
3:43 PM
12/16/2024



Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Billing details and feedback | Sa
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020m1t/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing details and feedback
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Billing details and feedback
New Relationship
Help for this Page
Step 2. Choose the related object
Step 2
Previous
Next
Cancel
Select the other object to which this object is related.
Related To
Service records
Type here to search
28°C Haze
3:44 PM
12/16/2024


Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Billing details and feedback | Sa
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020m1t/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing details and feedback
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Billing details and feedback
New Relationship
Help for this Page
Step 3. Enter the label and name for the lookup field
Step 3 of 6
Previous
Next
Cancel
Field Label
Service records
Field Name
Service_records
Description
Help Text
Child Relationship Name
Billing_details_and_feedbac
Required
Always require a value in this field in order to save a record
What to do if the lookup record is deleted?
Clear the value of this field. You can't choose this option if you make this field required.
Don't allow deletion of the lookup record that's part of a lookup relationship.
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Lookup Filter
Type here to search
28°C Haze
3:44 PM
12/16/2024


Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Billing details and feedback | Sa
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020m1t/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing details and feedback
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Billing details and feedback
New Relationship
Help for this Page
Step 4. Establish field-level security for reference field
Step 4 of 6
Previous
Next
Cancel
Field Label
Service records
Data Type
Lookup
Field Name
Service_records
Description
Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.
Field-Level Security for Profile
Visible
Read-Only
Analytics Cloud Integration User
Analytics Cloud Security User
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Type here to search
28°C Haze
3:44 PM
12/16/2024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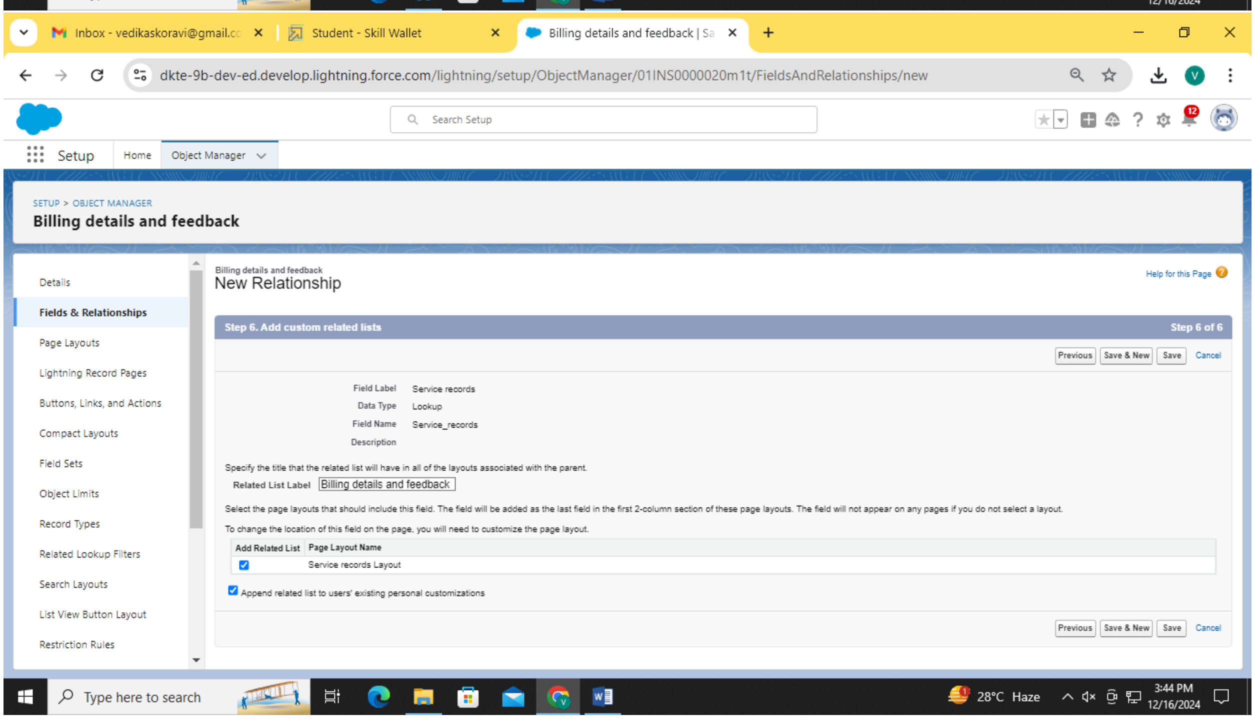
SETUP > OBJECT MANAGER
Billing details and feedback
Billing details and feedback
New Relationship
Step 5. Add reference field to Page Layouts
Step 5 of 6
Field Label Service records
Data Type Lookup
Field Name Service_records
Description
Select the page layouts that should include this field. The field 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
Previous
Next
Cancel

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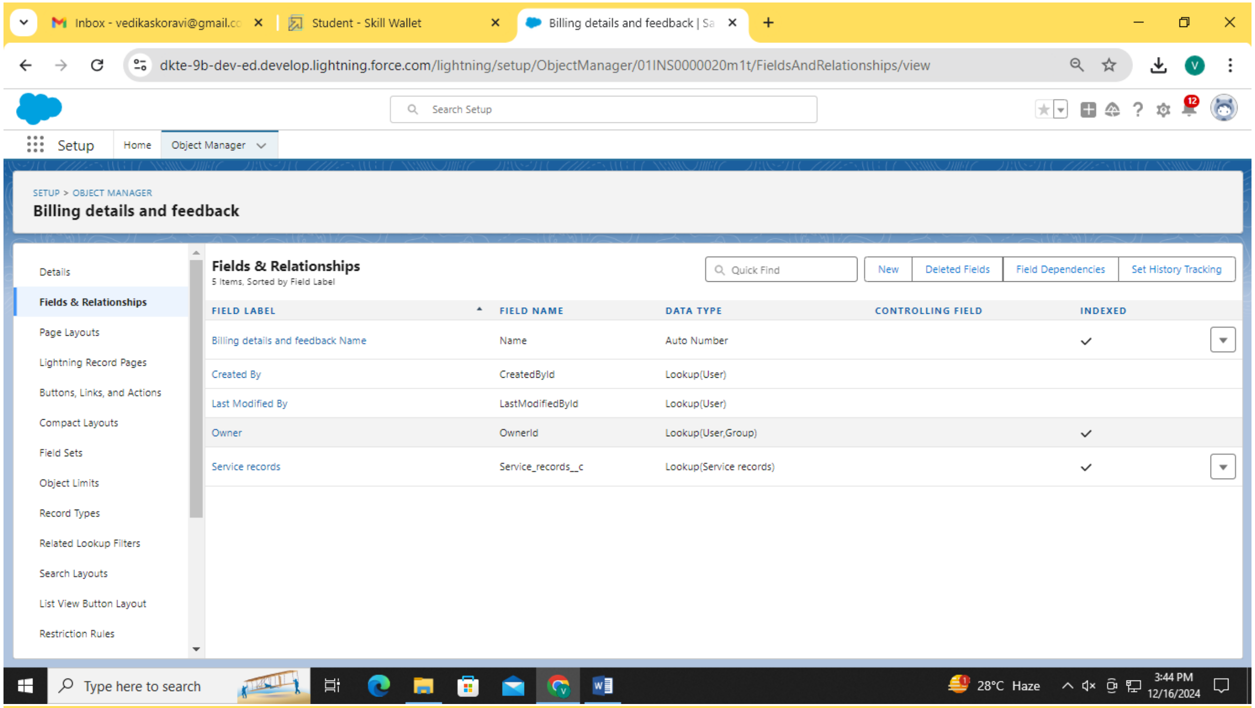
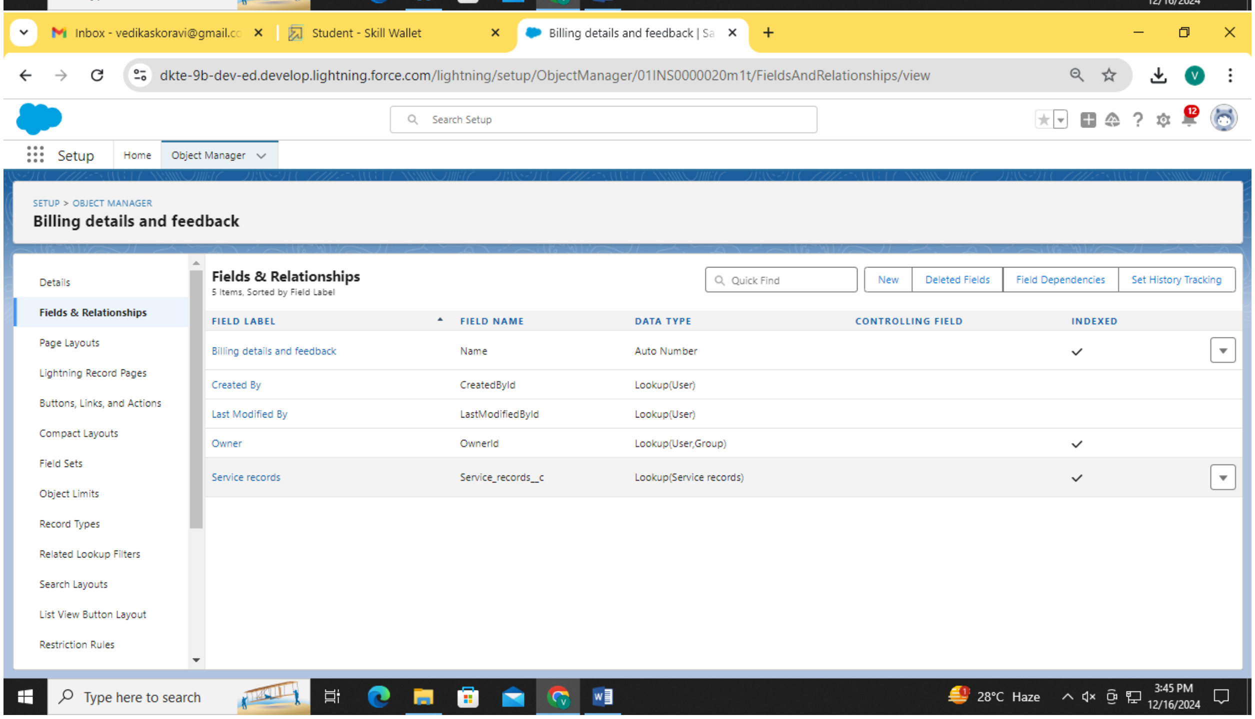
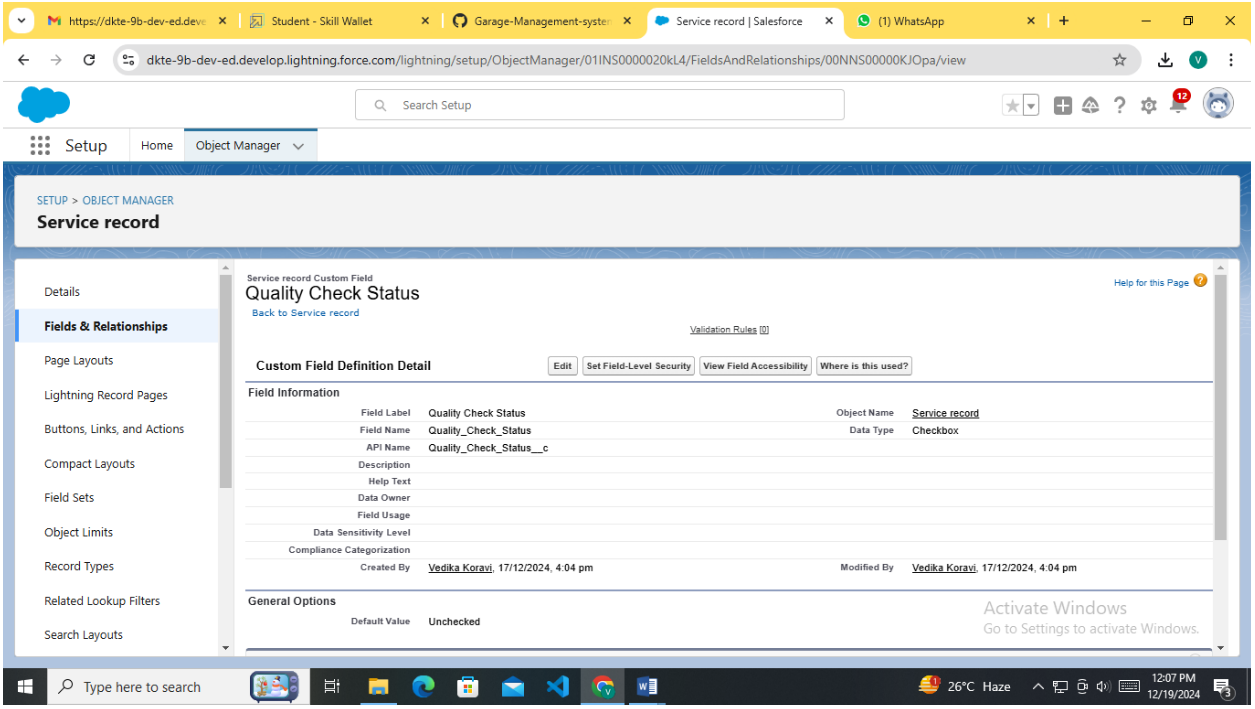
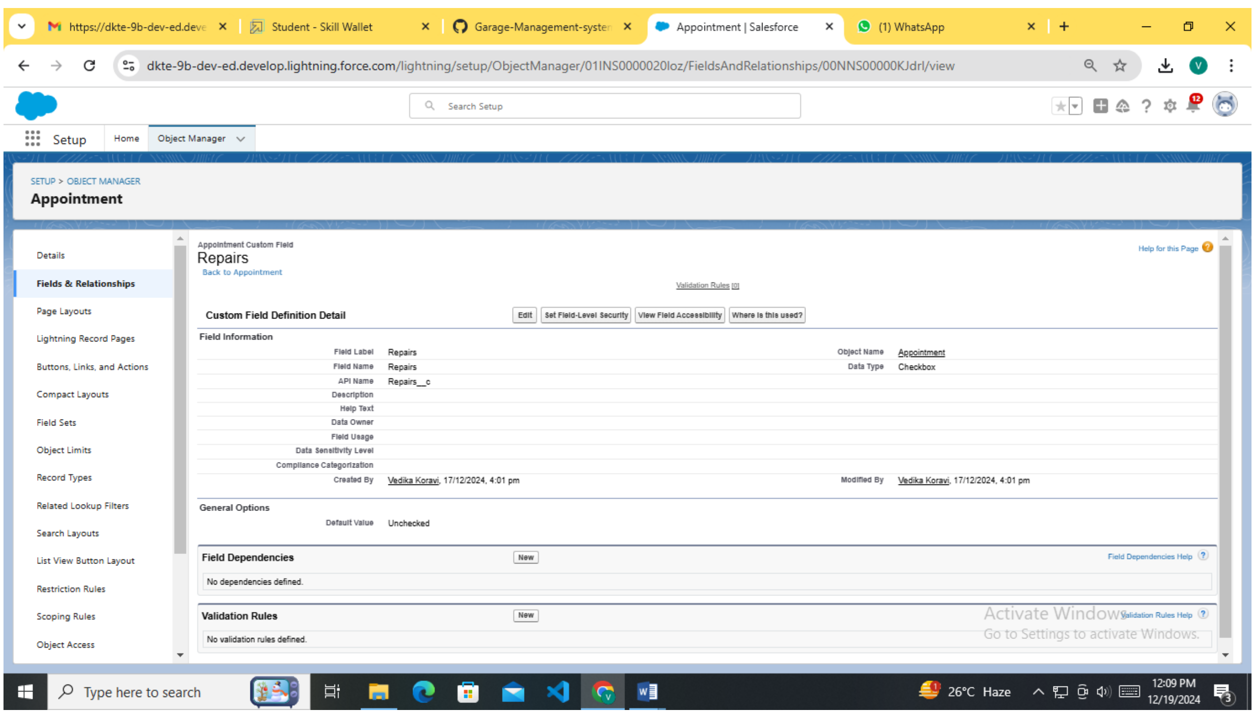
SETUP > OBJECT MANAGER
Billing details and feedback
Billing details and feedback
New Relationship
Step 6. Add custom related lists
Step 6 of 6
Field Label Service records
Data Type Lookup
Field Name Service_records
Description
Specify the title that the related list will have in all of the layouts associated 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
Previous
Save & New
Save
Cancel

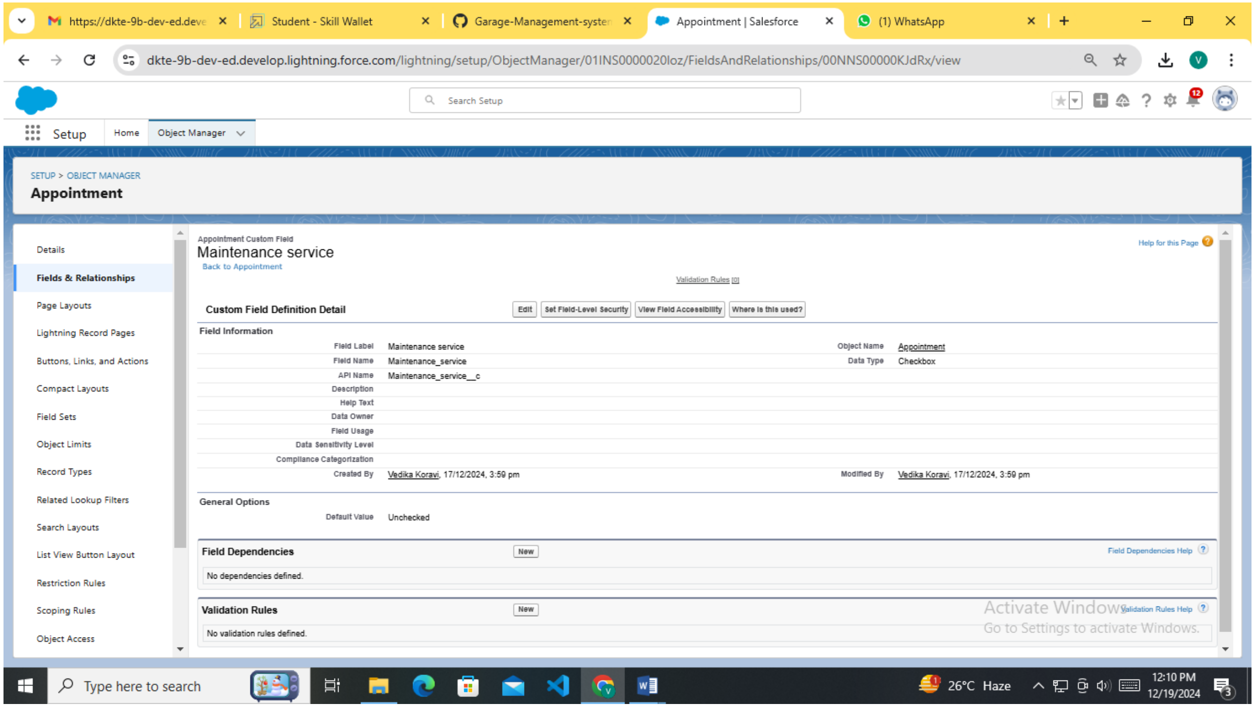

Inbox - vedikaskoravi@gmail.c
Student - Skill Wallet
Billing details and feedback | Sa
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020m1t/FieldsAndRelationships/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing details and feedback
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Fields & Relationships
5 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Billing details and 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)
Type here to search
28°C Haze
3:44 PM
12/16/2024


Inbox - vedikaskoravi@gmail.c
Student - Skill Wallet
Billing details and feedback | Sa
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020m1t/FieldsAndRelationships/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing details and feedback
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Fields & Relationships
5 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Billing details and feedback
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)
Type here to search
28°C Haze
3:45 PM
12/16/2024

Creation of Checkbox Fields



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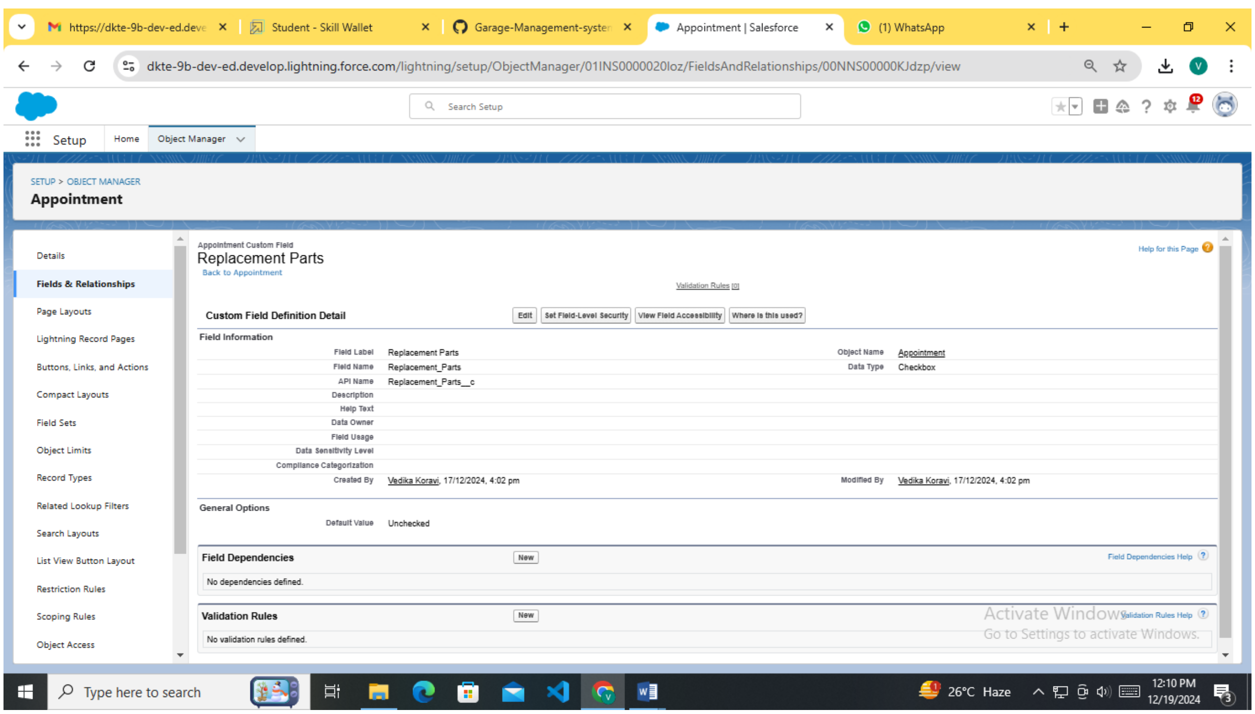
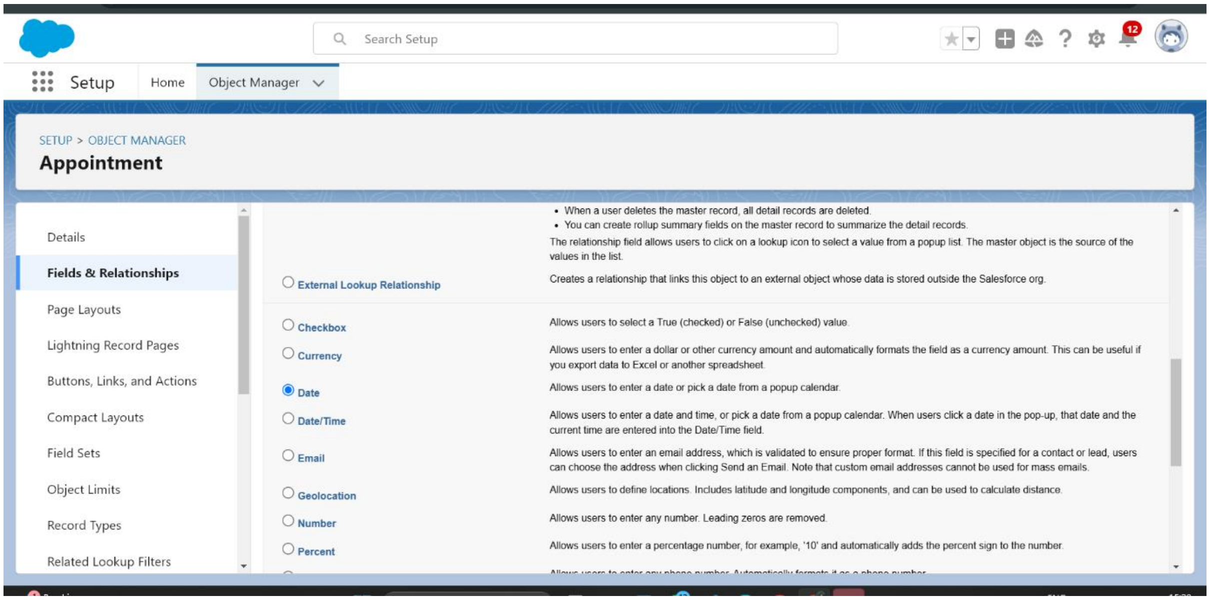
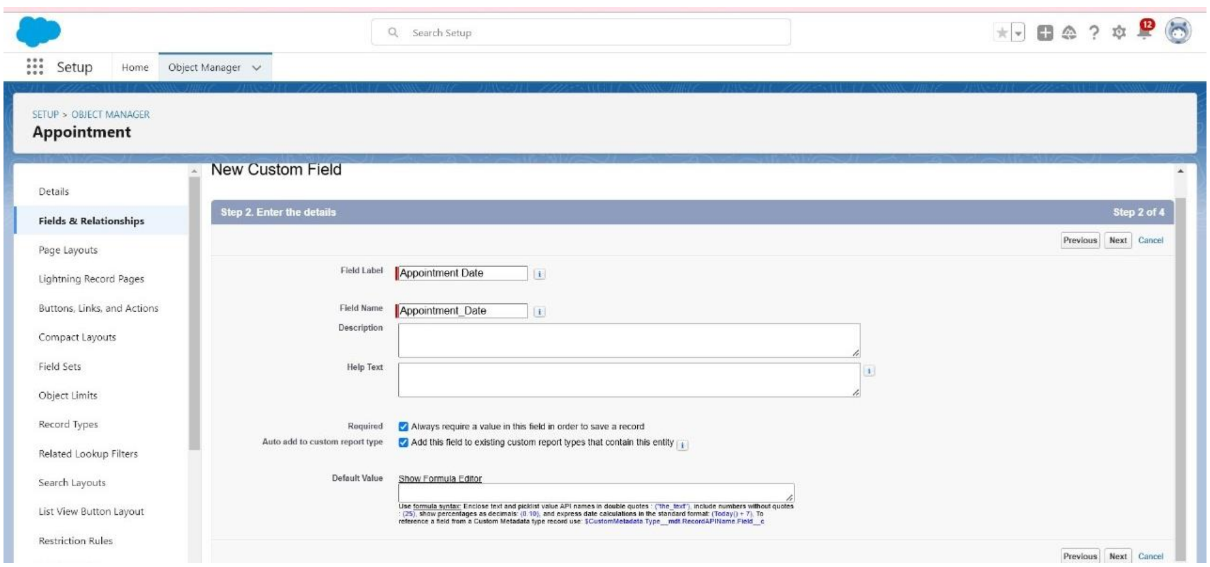
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Appointment Custom Field
Maintenance service
Back to Appointment
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label Maintenance service
Field Name Maintenance_service
API Name Maintenance_service__c
Object Name Appointment
Data Type Checkbox
Created By Vedika Koravi, 17/12/2024, 3:59 pm
Modified By Vedika Koravi, 17/12/2024, 3:59 pm
General Options
Default Value Unchecked
Field Dependencies
No dependencies defined.
Validation Rules
No validation rules defined.
Type here to search
26°C Haze
12:10 PM
12/19/2024

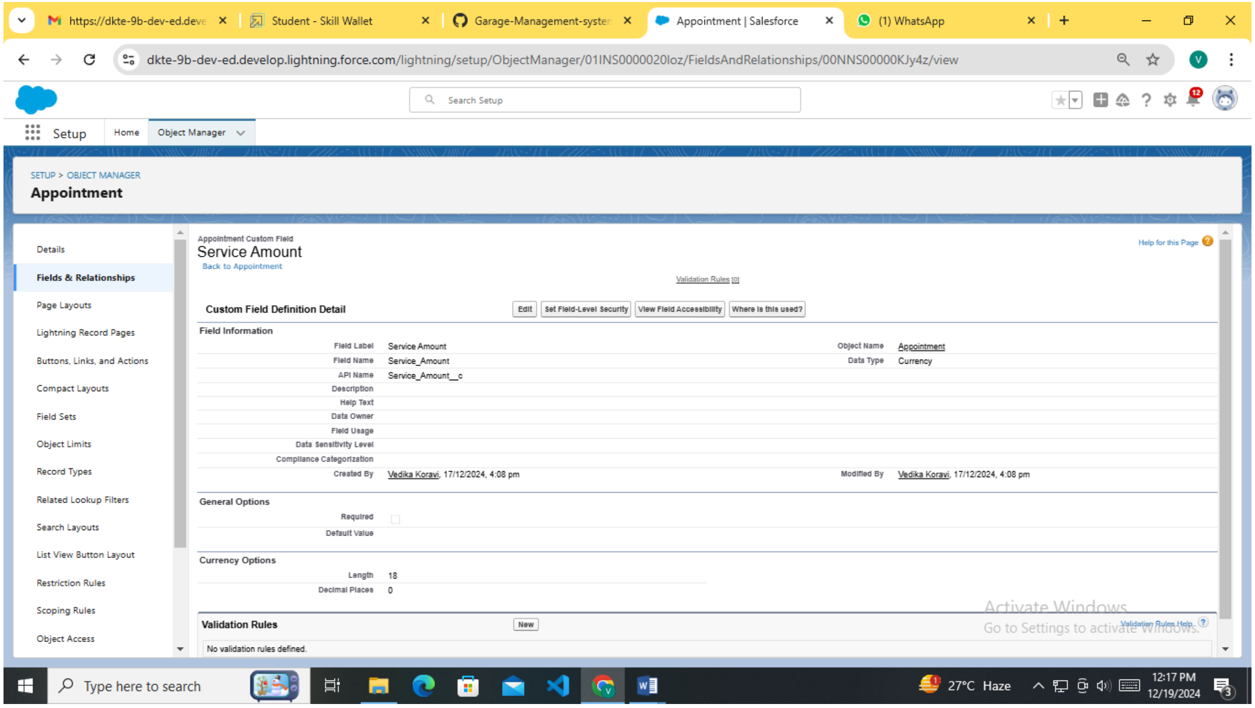

dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020loz/FieldsAndRelationships/00NNS00000KJdzp/view
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Appointment Custom Field
Replacement Parts
Back to Appointment
Custom Field Definition Detail
Edit
Set Field-Level Security
View Field Accessibility
Where is this used?
Field Information
Field Label Replacement Parts
Field Name Replacement_Parts
API Name Replacement_Parts__c
Object Name Appointment
Data Type Checkbox
Created By Vedika Koravi, 17/12/2024, 4:02 pm
Modified By Vedika Koravi, 17/12/2024, 4:02 pm
General Options
Default Value Unchecked
Field Dependencies
No dependencies defined.
Validation Rules
No validation rules defined.
Type here to search
26°C Haze
12:10 PM
12/19/2024

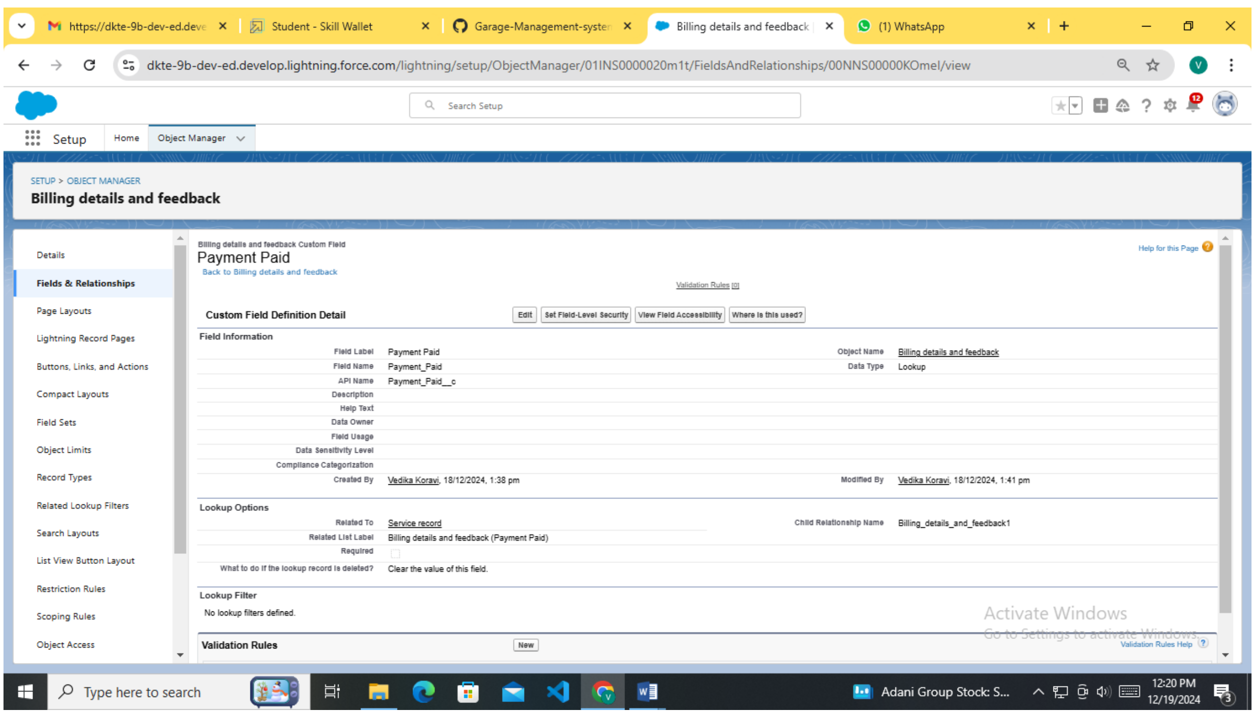
Creation of date Fields



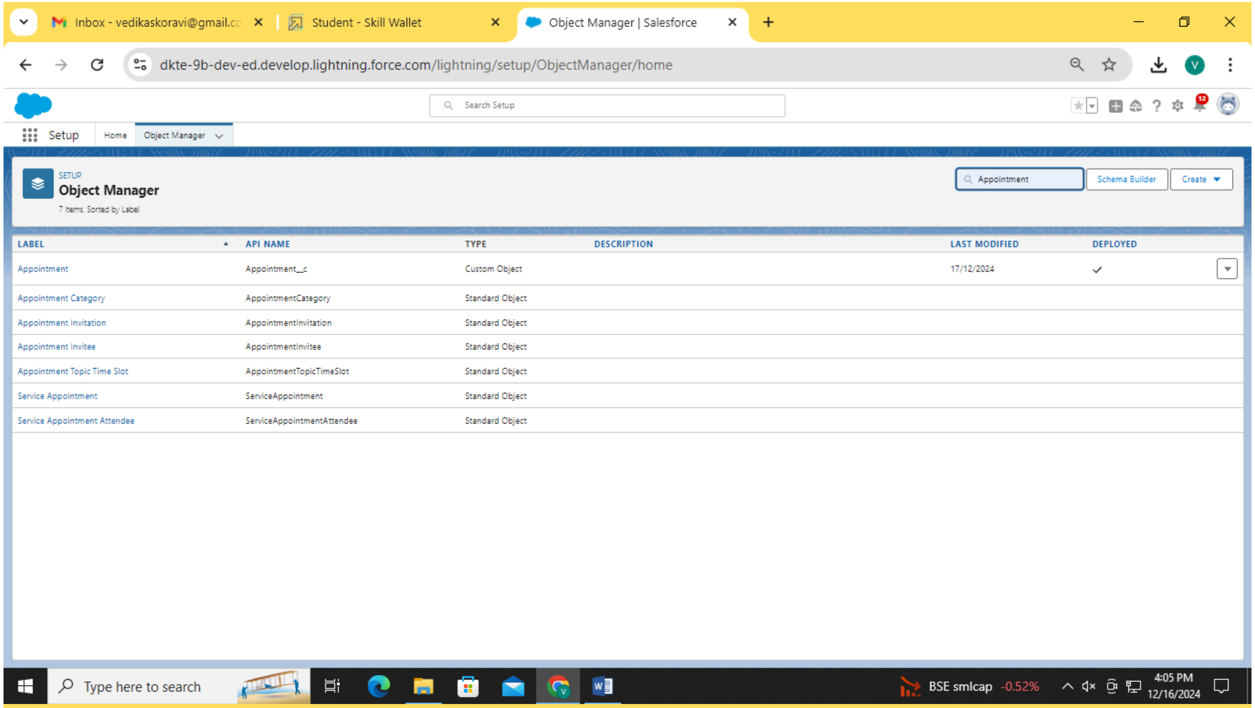


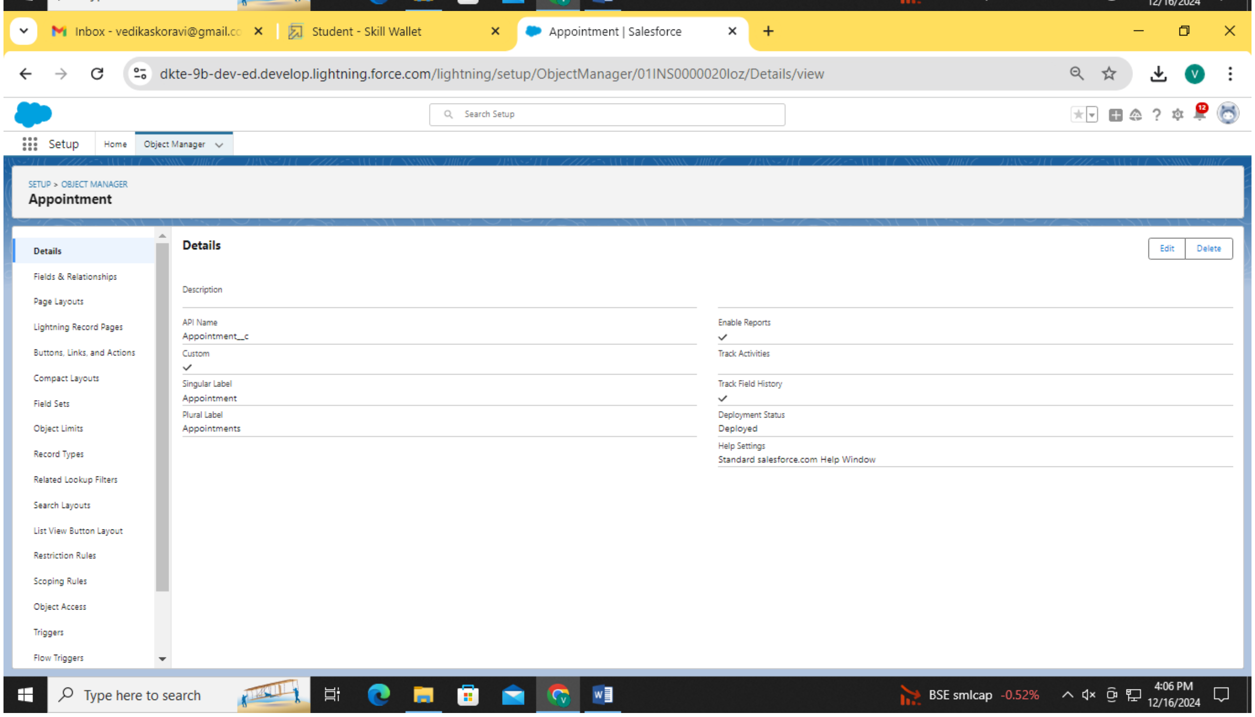
Creation of Currency Fields

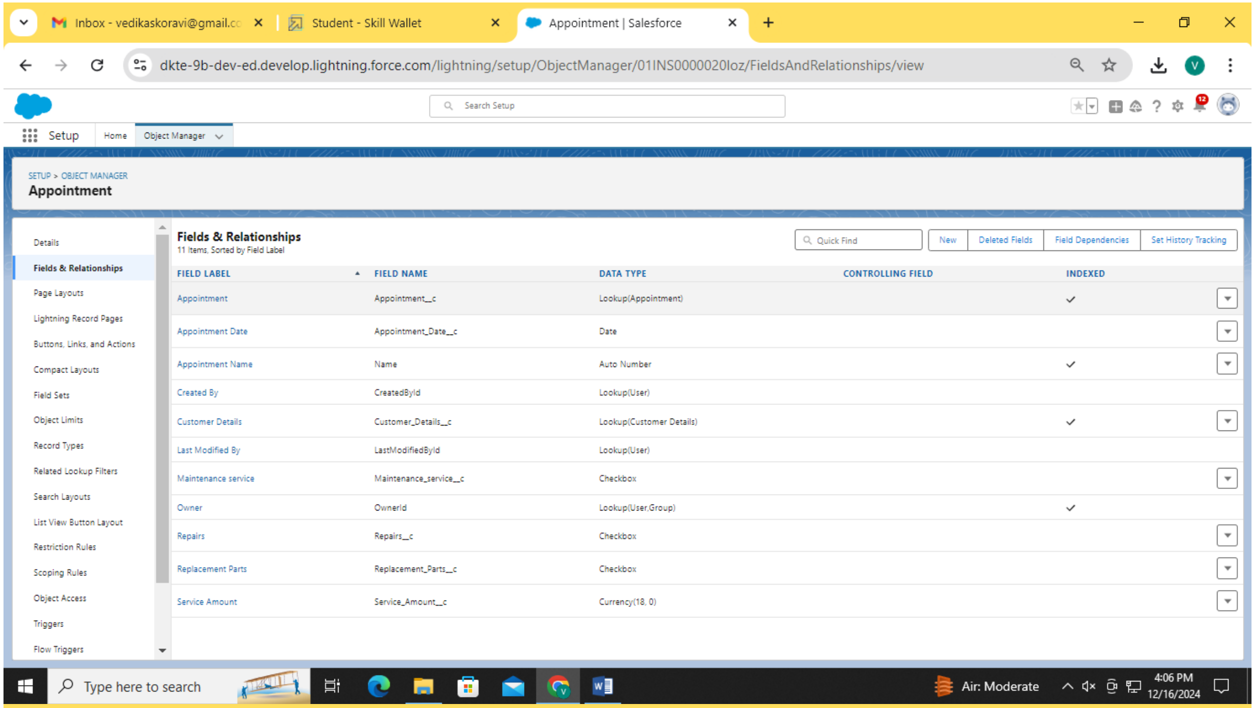




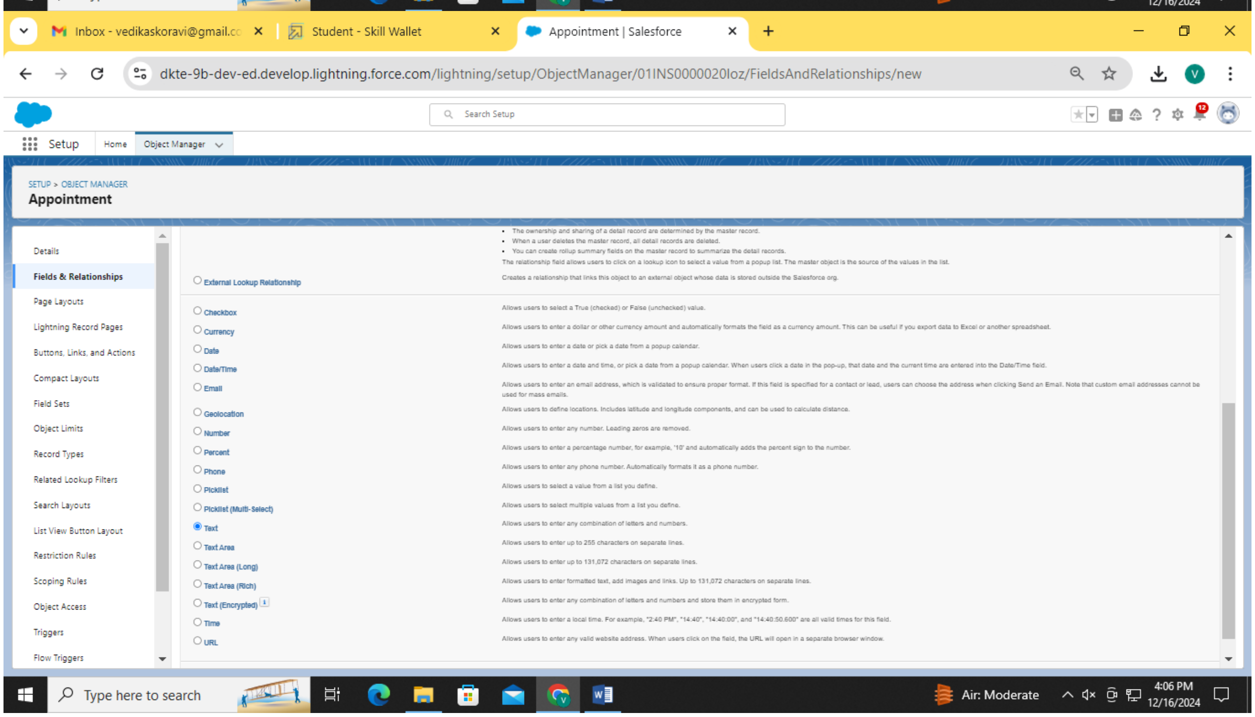
Creation of Text Fields







Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Appointment | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020loz/FieldsAndRelationships/view
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
Scoping Rules
Object Access
Triggers
Flow Triggers
Fields & Relationships
11 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Appointment
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)
Type here to search
Air: Moderate
4:06 PM
12/16/2024



Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Appointment | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020loz/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
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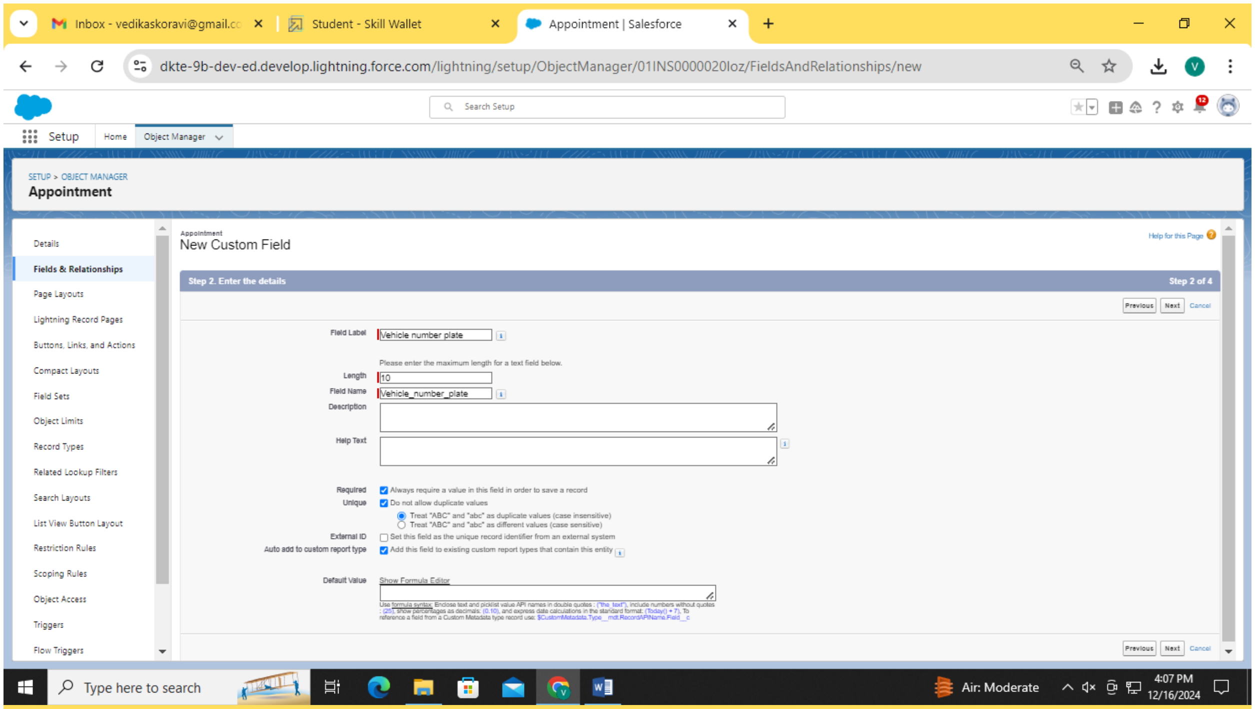
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
The ownership and sharing of a detail record are determined by the master record.
When a user deletes the master record, all detail records are deleted.
You can create rollup summary fields on the master record to summarize the detail records.
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
Checkbox
Allows users to select a True (checked) or False (unchecked) value.
Currency
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
Date
Allows users to enter a date or pick a date from a popup calendar.
Date/Time
Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Email
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation
Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Number
Allows users to enter any number. Leading zeros are removed.
Percent
Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone
Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist
Allows users to select a value from a list you define.
Picklist (Multi-Select)
Allows users to select multiple values from a list you define.
Text
Allows users to enter any combination of letters and numbers.
Text Area
Allows users to enter up to 255 characters on separate lines.
Text Area (Long)
Allows users to enter up to 131,072 characters on separate lines.
Text Area (Rich)
Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
Text (Encrypted)
Allows users to enter any combination of letters and numbers and store them in encrypted form.
Time
Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.600" are all valid times for this field.
URL
Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.
Type here to search
Air: Moderate
4:06 PM
12/16/2024


Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Appointment | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020loz/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
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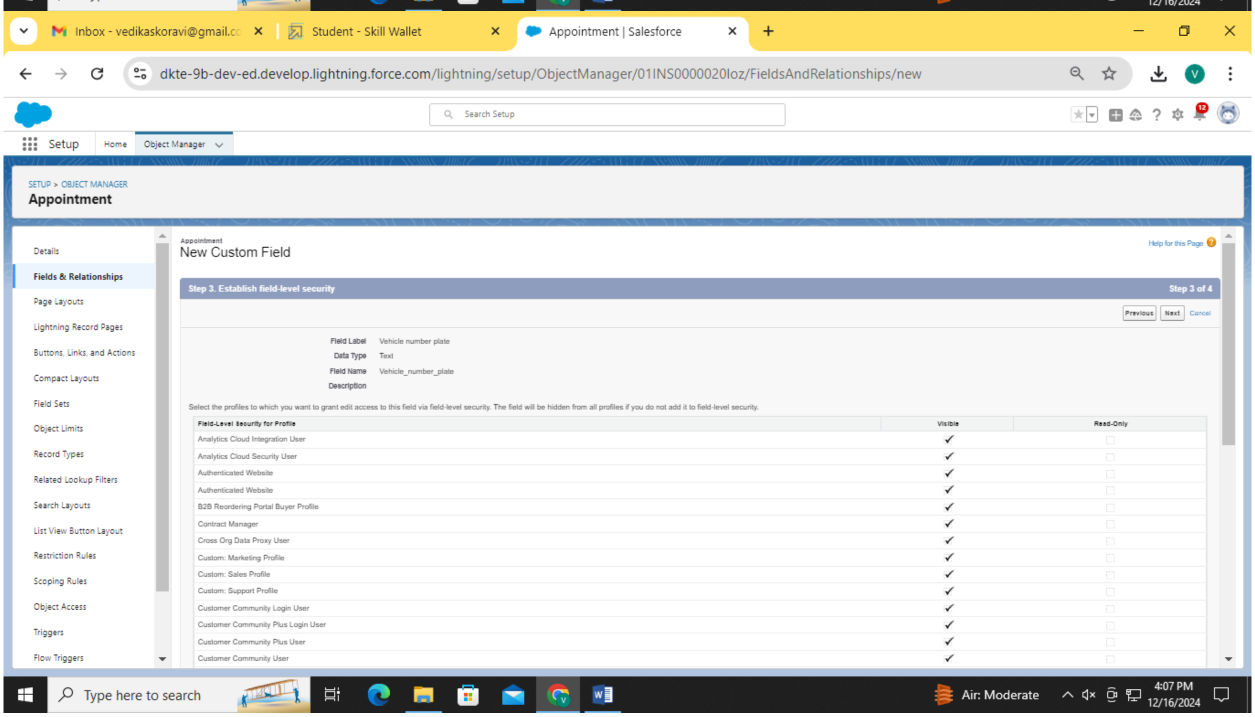
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Appointment
New Custom Field
Help for this Page
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
Vehicle number plate
Please enter the maximum length for a text field below.
Length
10
Field Name
Vehicle_number_plate
Description
Help Text
Required
Always require a value in this field in order to save a record
Unique
Do not allow duplicate values
Treat "ABC" and "abc" as duplicate values (case insensitive)
Treat "ABC" and "abc" as different values (case sensitive)
External ID
Set this field as the unique record identifier from an external system
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Default Value
Show Formula Editor
Type here to search
Air: Moderate
4:07 PM
12/16/2024


Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Appointment | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020loz/FieldsAndRelationships/new
Search Setup
Setup
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Object Manager
SETUP > OBJECT MANAGER
Appointment
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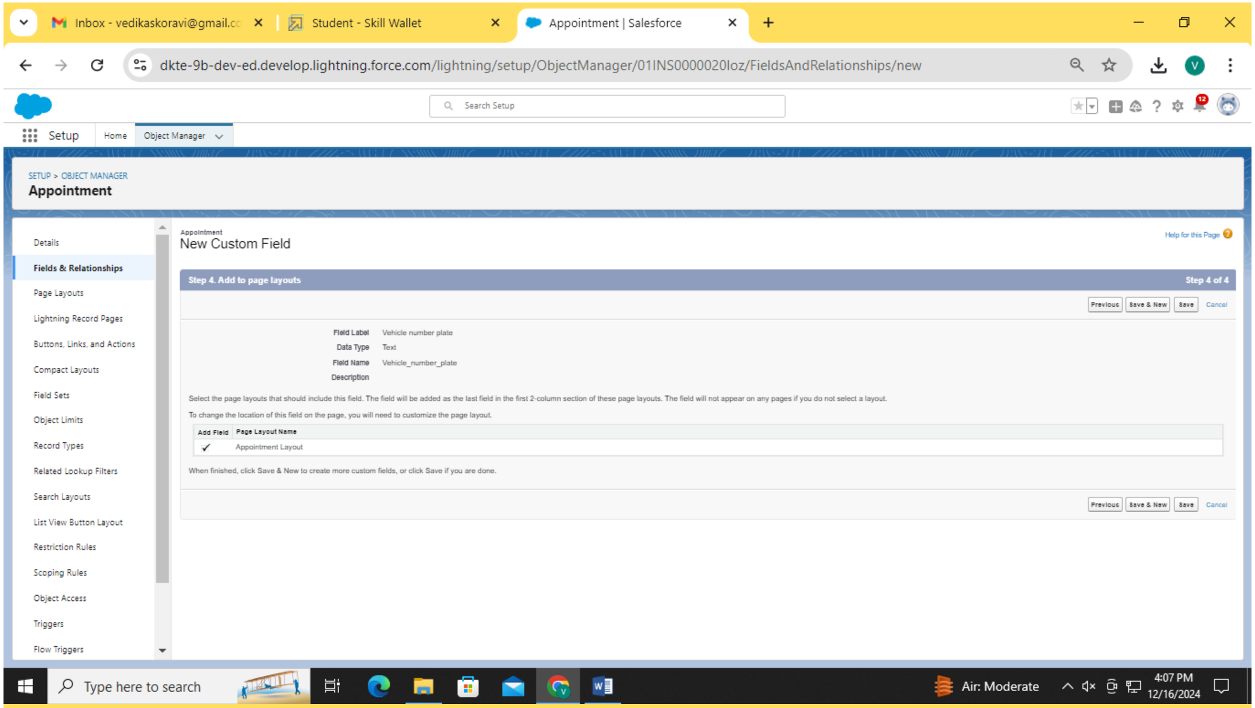
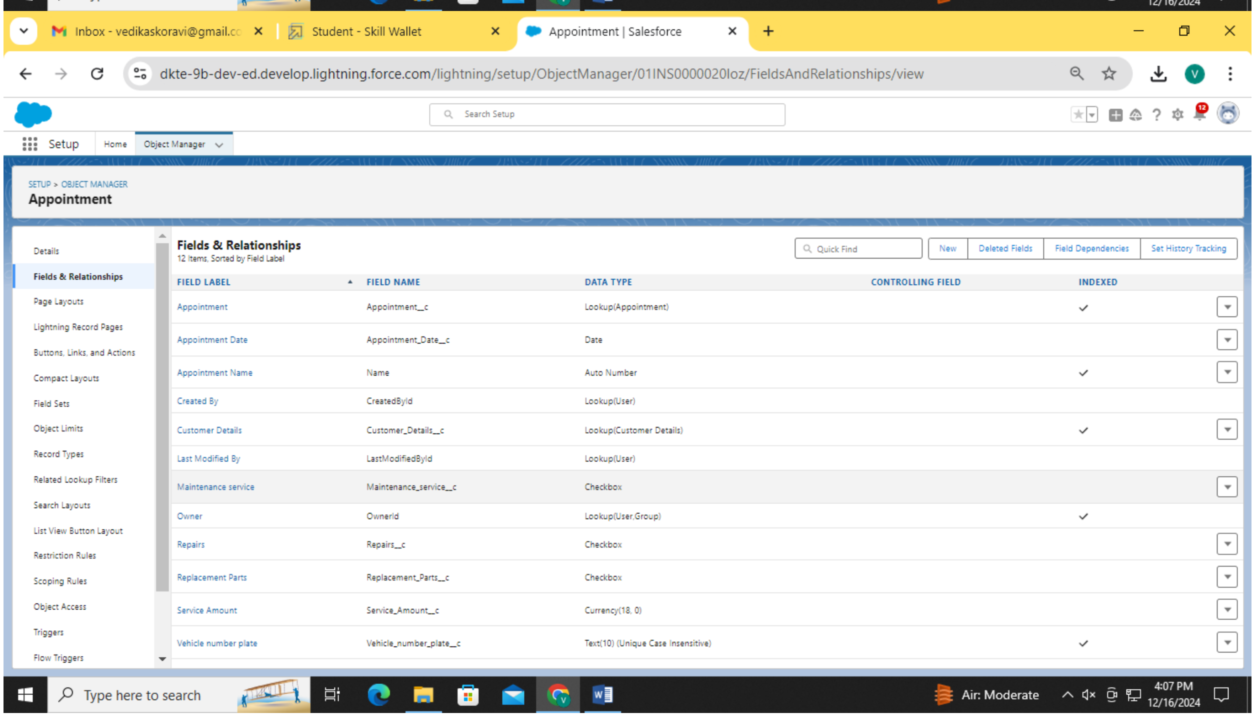
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Appointment
New Custom Field
Help for this Page
Step 3. Establish field-level security
Step 3 of 4
Previous
Next
Cancel
Field Label
Vehicle number plate
Data Type
Text
Field 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
Analytics Cloud Security User
Authenticated Website
Authenticated Website
B2B Reordering Portal Buyer Profile
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Customer Community Login User
Customer Community Plus Login User
Customer Community Plus User
Customer Community User
Type here to search
Air: Moderate
4:07 PM
12/16/2024


Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Appointment | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020loz/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Appointment
New Custom Field
Help for this Page
Step 4. Add to page layouts
Step 4 of 4
Previous
Save & New
Save
Cancel
Field Label Vehicle number plate
Data Type Text
Field Name Vehicle_number_plate
Description
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
Add Field
Page Layout Name
Appointment Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.
Type here to search
Air: Moderate
4:07 PM
12/16/2024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Student - Skill Wallet
Appointment | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020loz/FieldsAndRelationships/view
Search Setup
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Buttons, Links, and Actions
Compact Layouts
Field Sets
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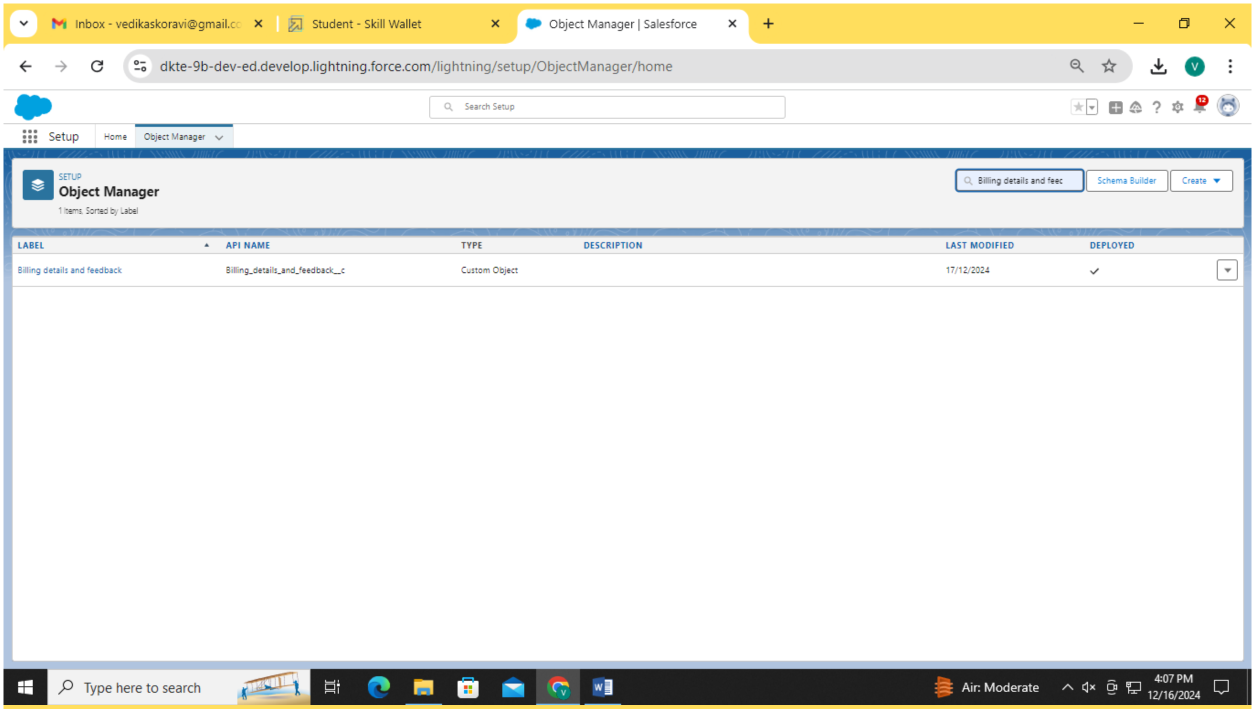
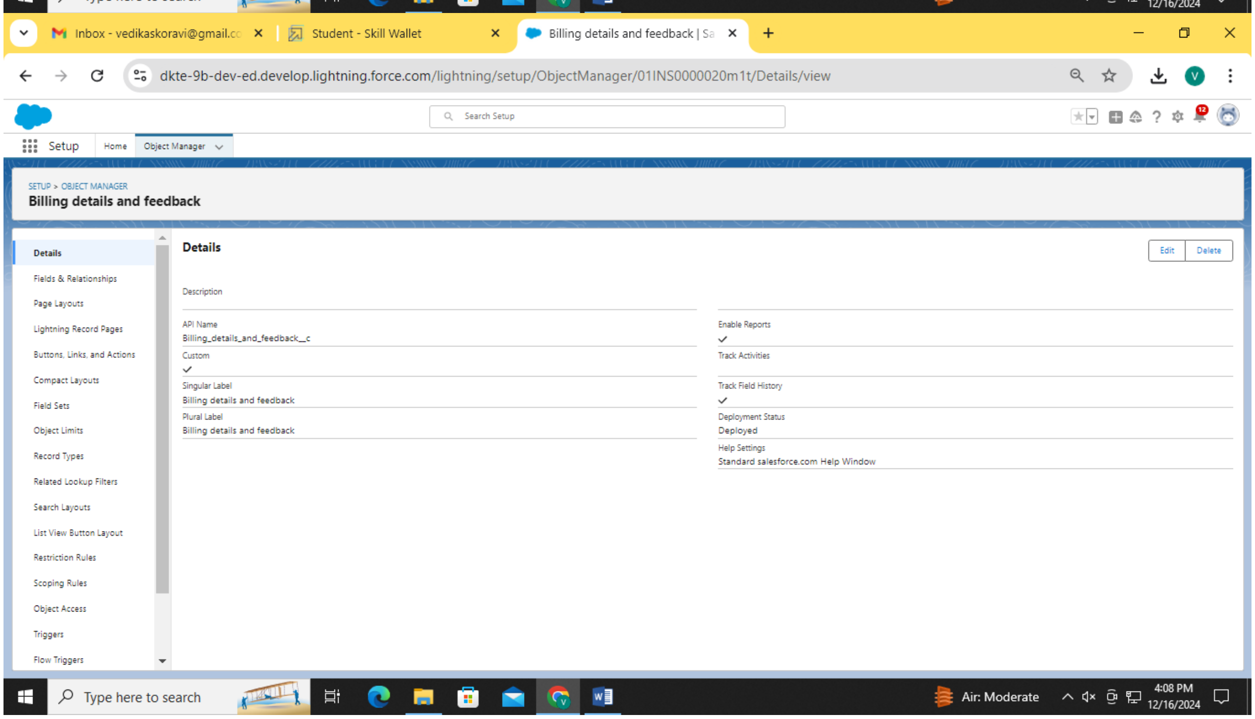
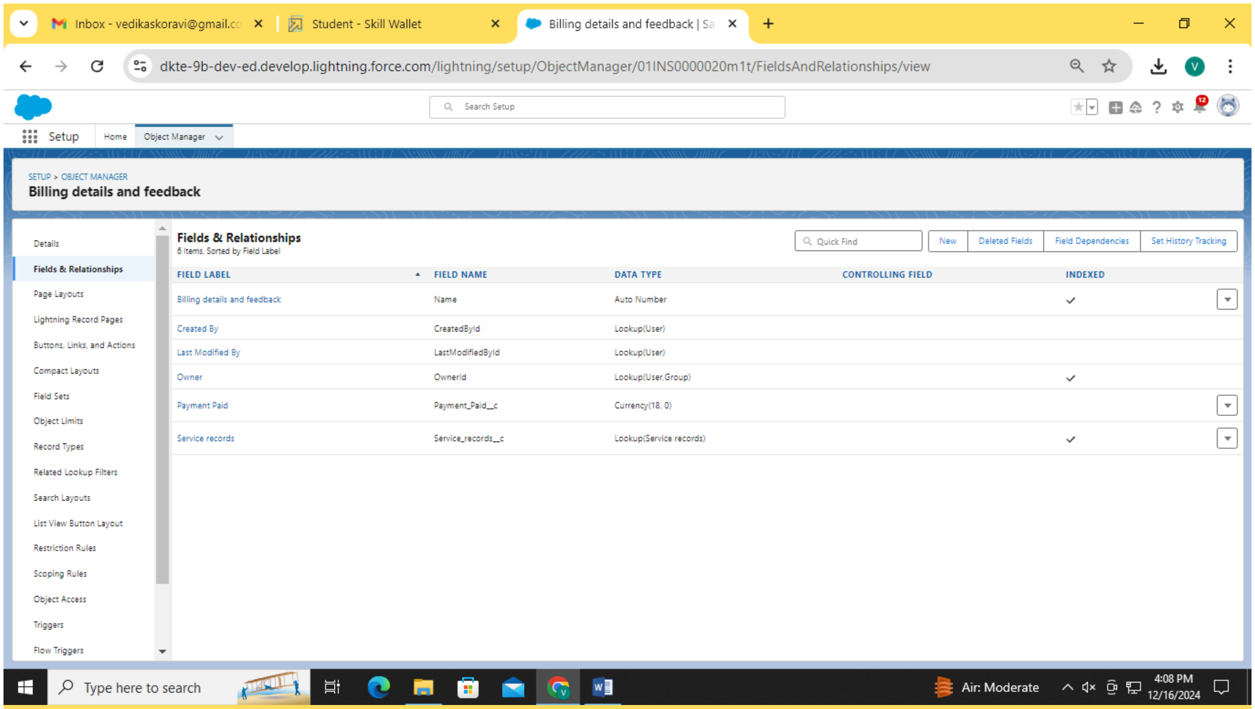
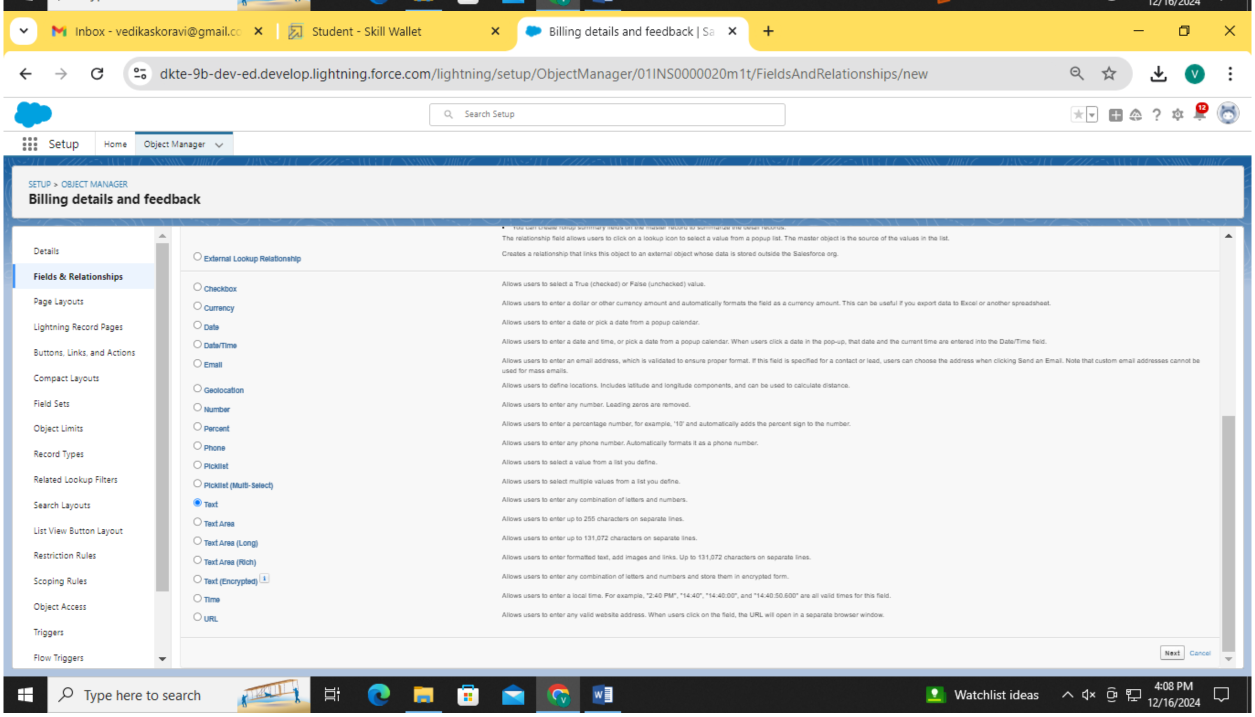
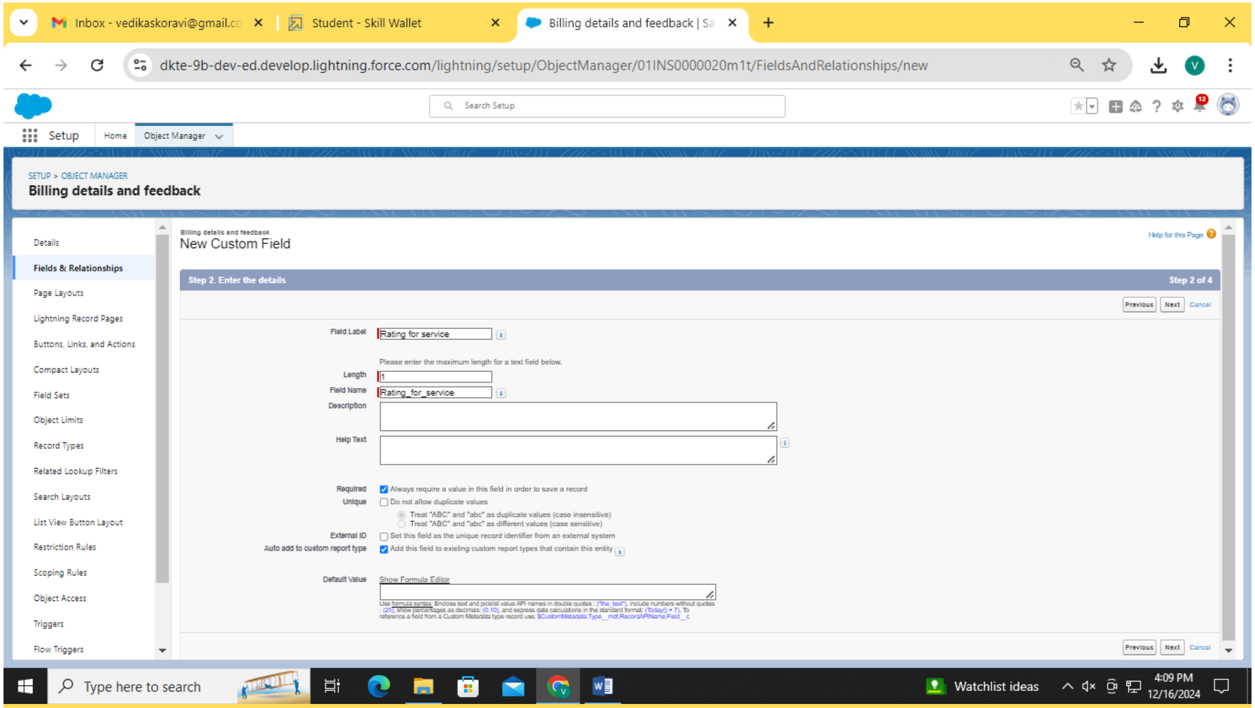
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Fields & Relationships
12 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Appointment
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)
Type here to search
Air: Moderate
4:07 PM
12/16/2024


Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Object Manager | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home
Search Setup
Setup
Home
Object Manager
SETUP
Object Manager
1 Items, Sorted by Label
Billing details and feec
Schema Builder
Create
LABEL
API NAME
TYPE
DESCRIPTION
LAST MODIFIED
DEPLOYED
Billing details and feedback
Billing_details_and_feedback__c
Custom Object
17/12/2024
Type here to search
Air: Moderate
4:07 PM
12/16/2024


Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Billing details and feedback | Sa
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020m1t/Details/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing details and feedback
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Details
Edit
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
Type here to search
Air: Moderate
4:08 PM
12/16/2024


Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Billing details and feedback | Sa
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020m1t/FieldsAndRelationships/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing details and feedback
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Fields & Relationships
6 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Billing details and 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)
Type here to search
Air: Moderate
4:08 PM
12/16/2024


Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Billing details and feedback | Sa
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020m1t/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing details and feedback
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
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
Next
Cancel
Type here to search
Watchlist ideas
4:08 PM
12/16/2024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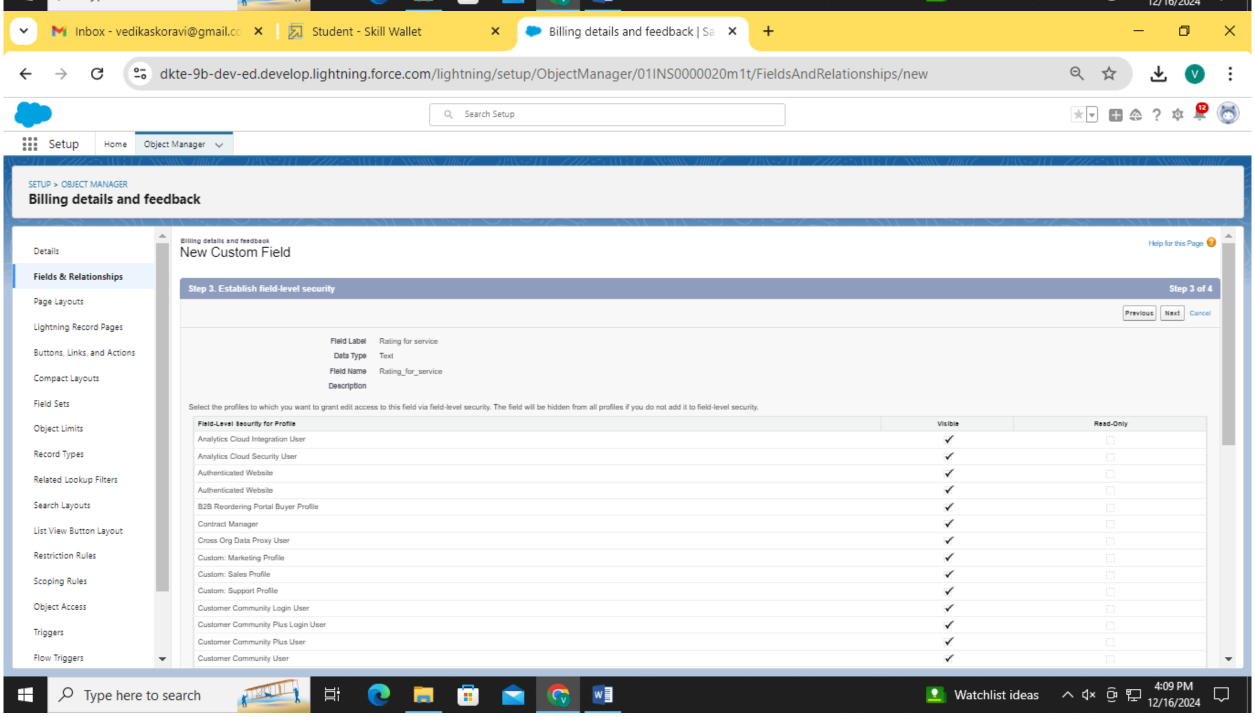
SETUP > OBJECT MANAGER
Billing details and feedback
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
New Custom Field
Step 2. Enter the details
Step 2 of 4
Field Label
Rating for service
Please enter the maximum length for a text field below.
Length
1
Field Name
Rating_for_service
Description
Help Text
Required
Always require a value in this field in order to save a record
Unique
Do not allow duplicate values
External ID
Set this field as the unique record identifier from an external system
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Default Value
Show Formula Editor
Type here to search
Watchlist ideas
4:09 PM
12/16/2024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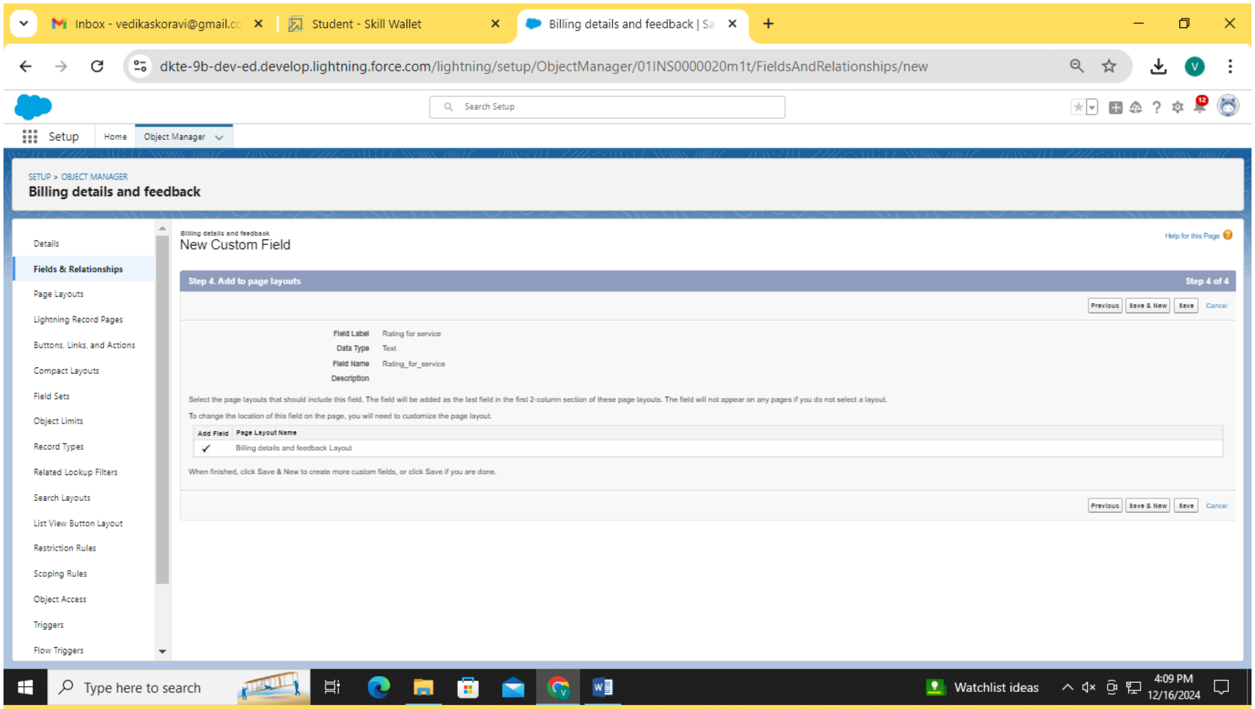
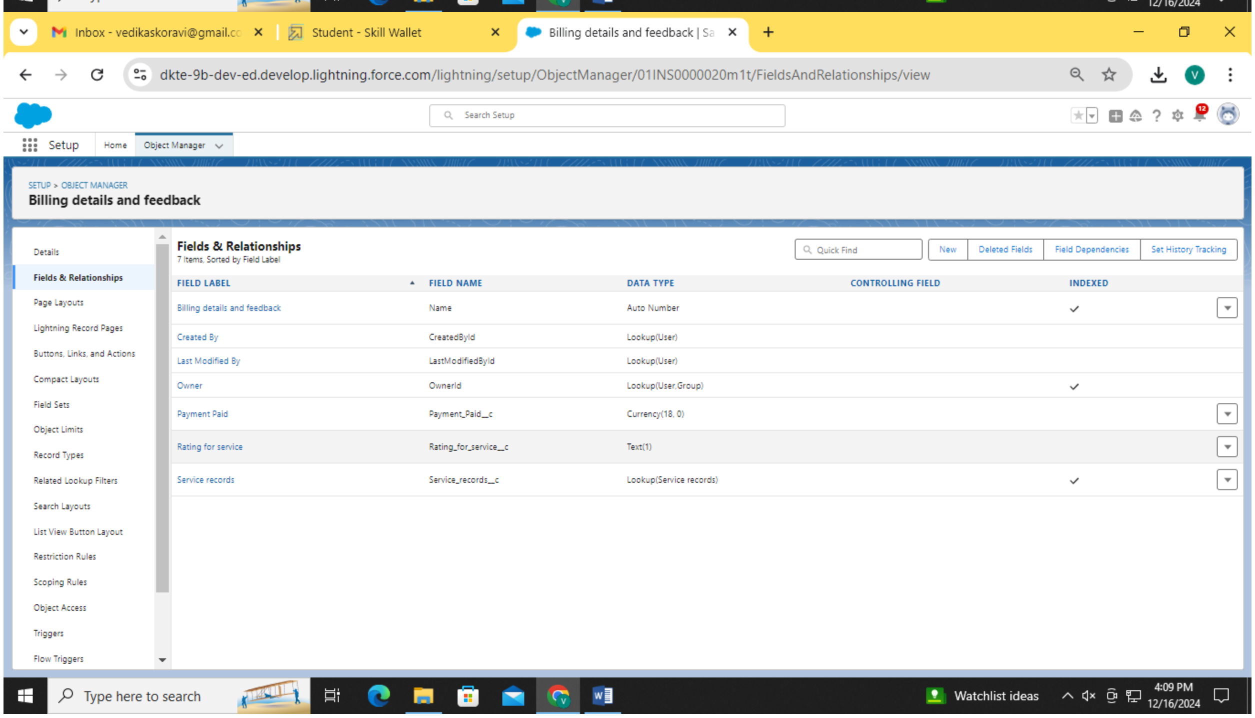
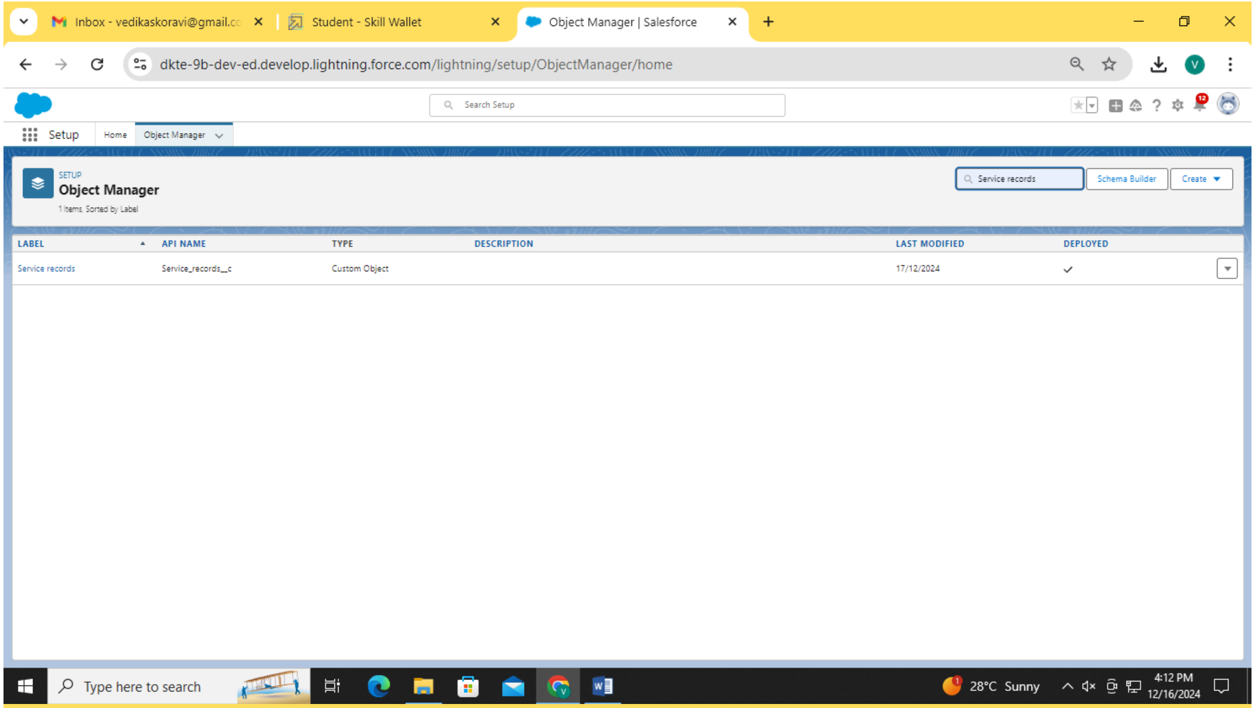
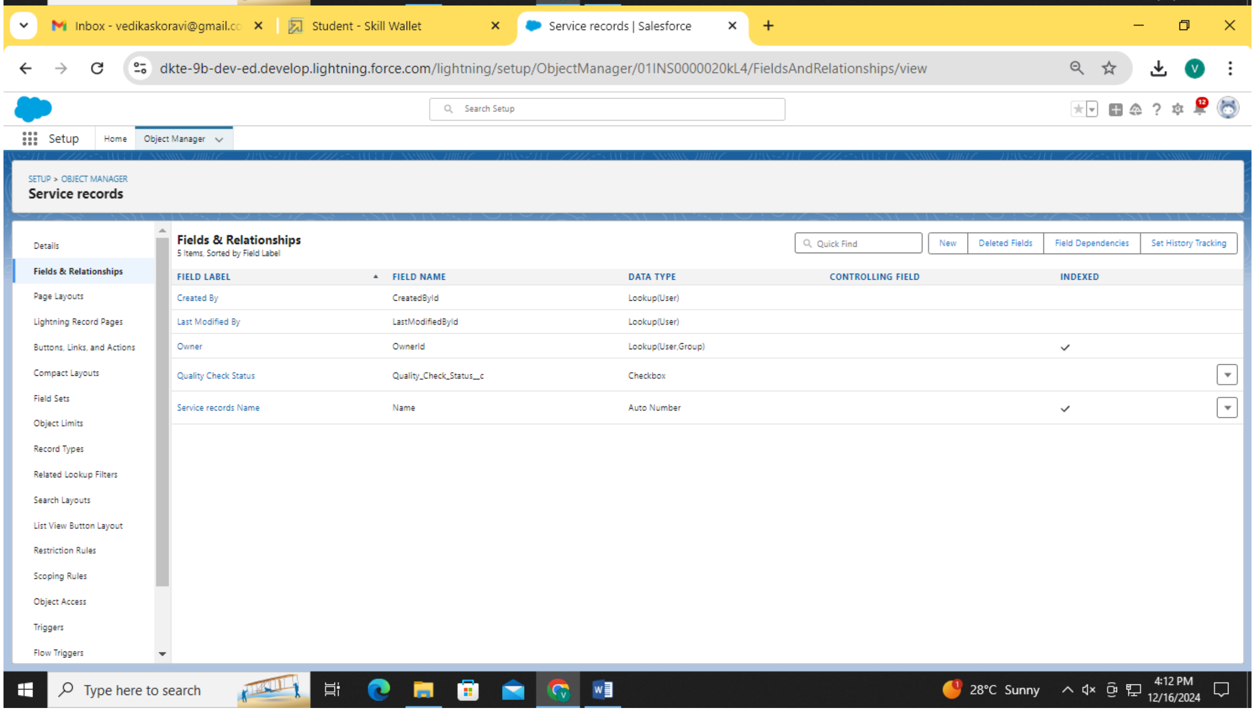
SETUP > OBJECT MANAGER
Billing details and feedback
New Custom Field
Step 3. Establish field-level security
Step 3 of 4
Field Label
Rating for service
Data Type
Text
Field Name
Rating_for_service
Description
Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.
Field-Level Security 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
Custom: Sales Profile
Custom: Support Profile
Customer Community Login User
Customer Community Plus Login User
Customer Community Plus User
Customer Community User
Type here to search
Watchlist ideas
4:09 PM
12/16/2024

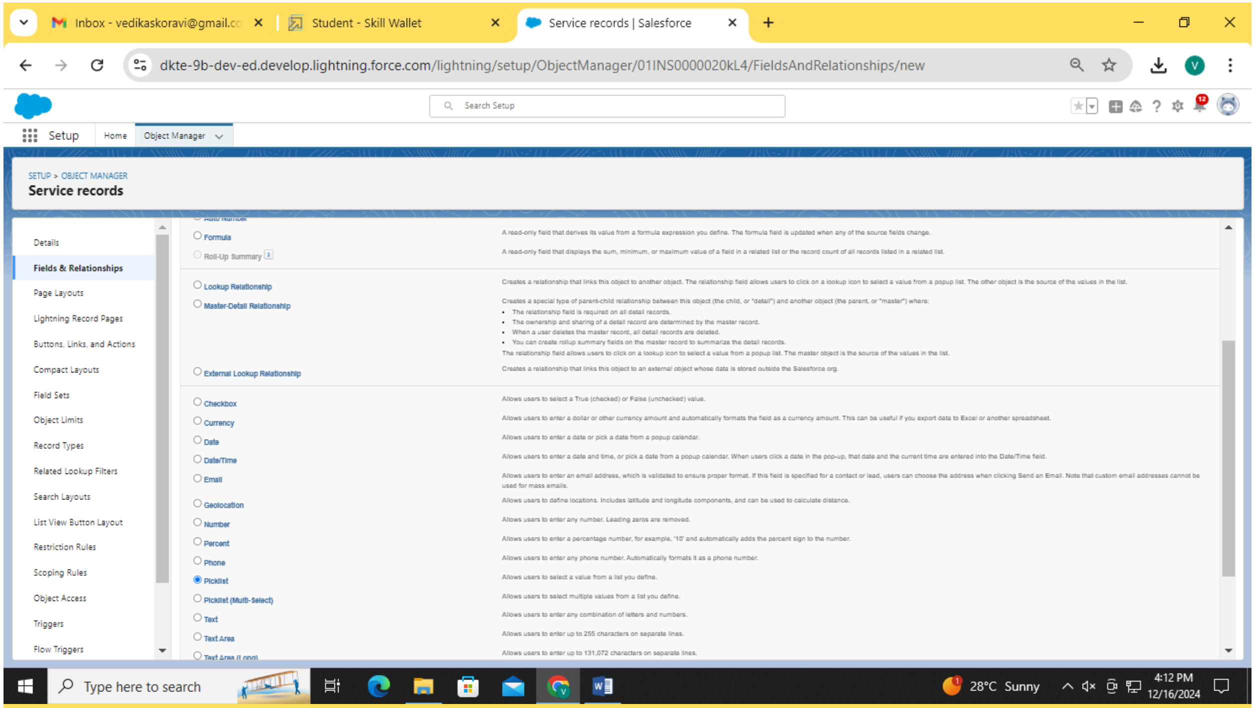

Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Billing details and feedback | Sa
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020m1t/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing details and feedback
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Billing details and feedback
New Custom Field
Help for this Page
Step 4. Add to page layouts
Step 4 of 4
Previous
Save & New
Save
Cancel
Field Label Rating for service
Data Type Text
Field Name Rating_for_service
Description
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
Add Field
Page Layout Name
Billing details and feedback Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.
Type here to search
Watchlist ideas
4:09 PM
12/16/2024

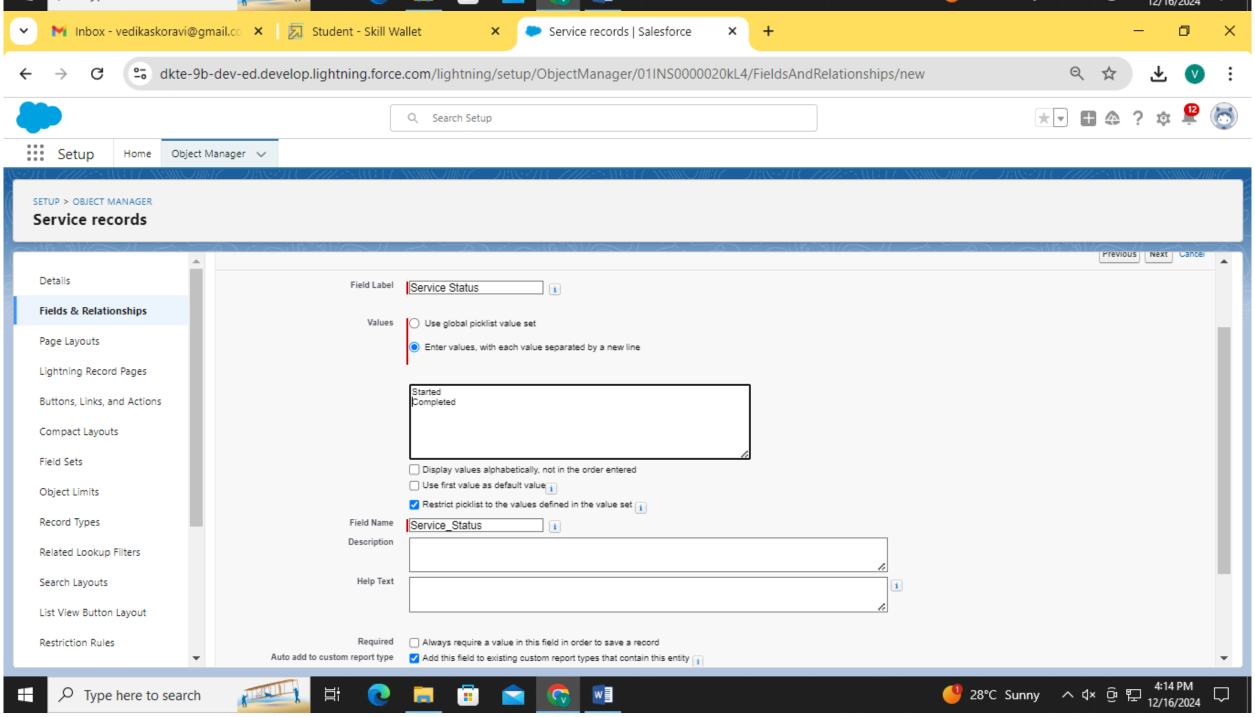

Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Billing details and feedback | Sa
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020m1t/FieldsAndRelationships/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing details and feedback
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Fields & Relationships
7 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
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)
Type here to search
Watchlist ideas
4:09 PM
12/16/2024

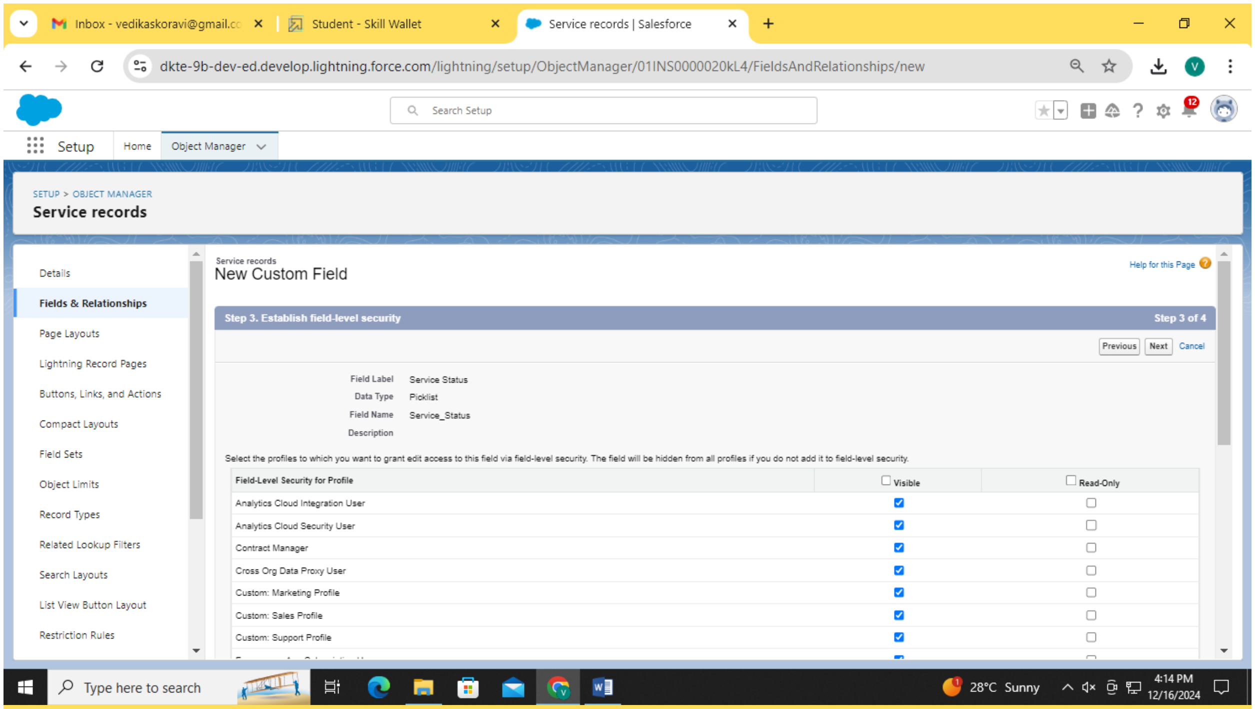
Creation of Picklist Fields

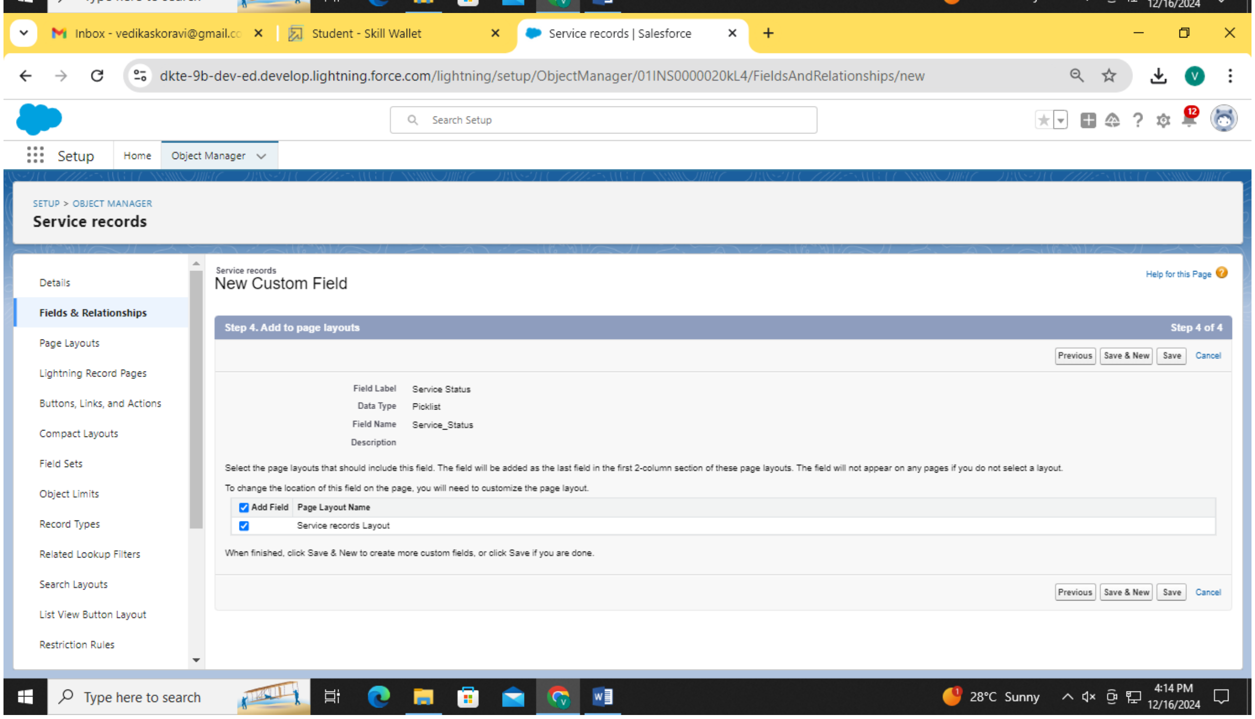


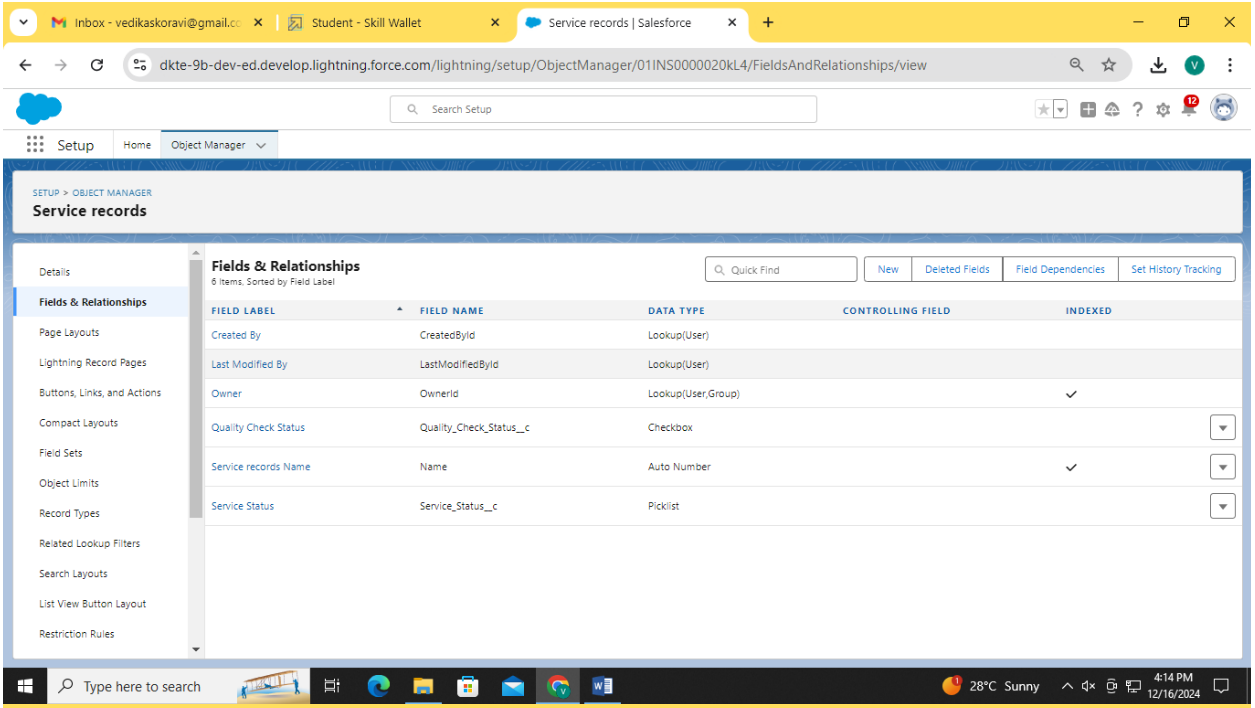


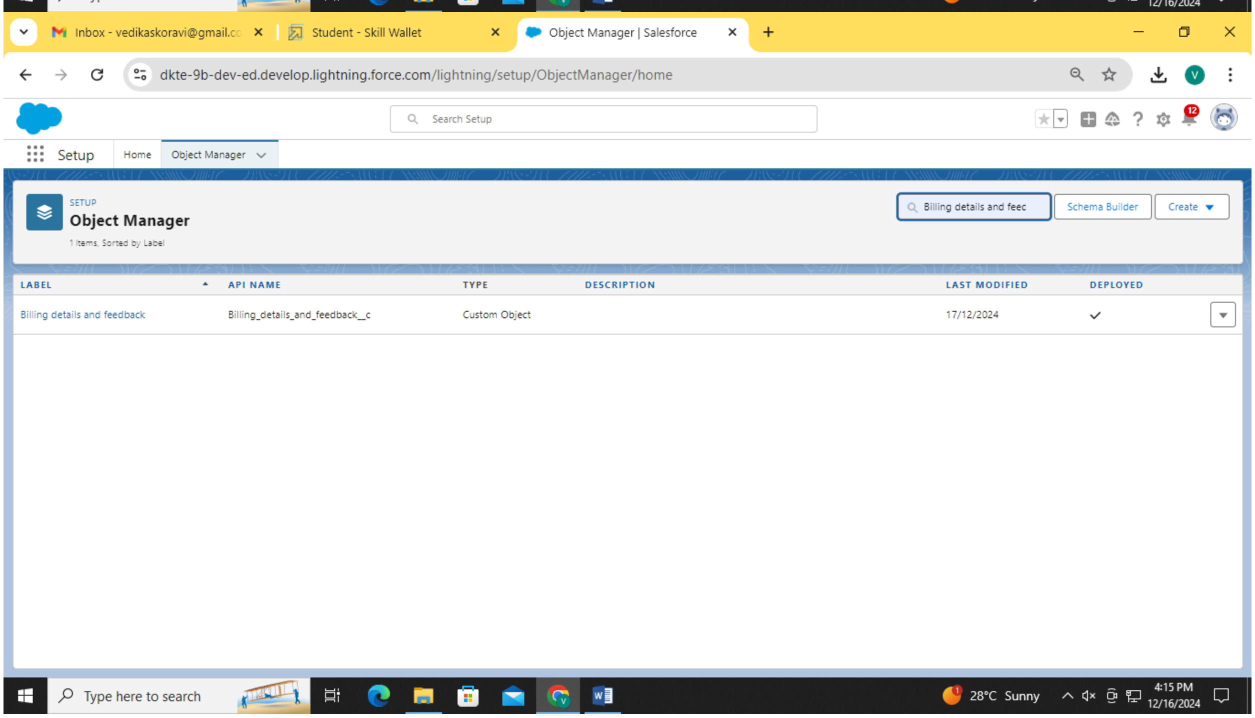

Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Service records | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020kL4/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Service records
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Object Access
Triggers
Flow Triggers
Formula
Roll-Up Summary
Lookup Relationship
Master-Detail Relationship
External Lookup Relationship
Checkbox
Currency
Date
Date/Time
Email
Geolocation
Number
Percent
Phone
Picklist
Picklist (Multi-Select)
Text
Text Area
Type here to search
28°C Sunny
4:12 PM
12/16/2024

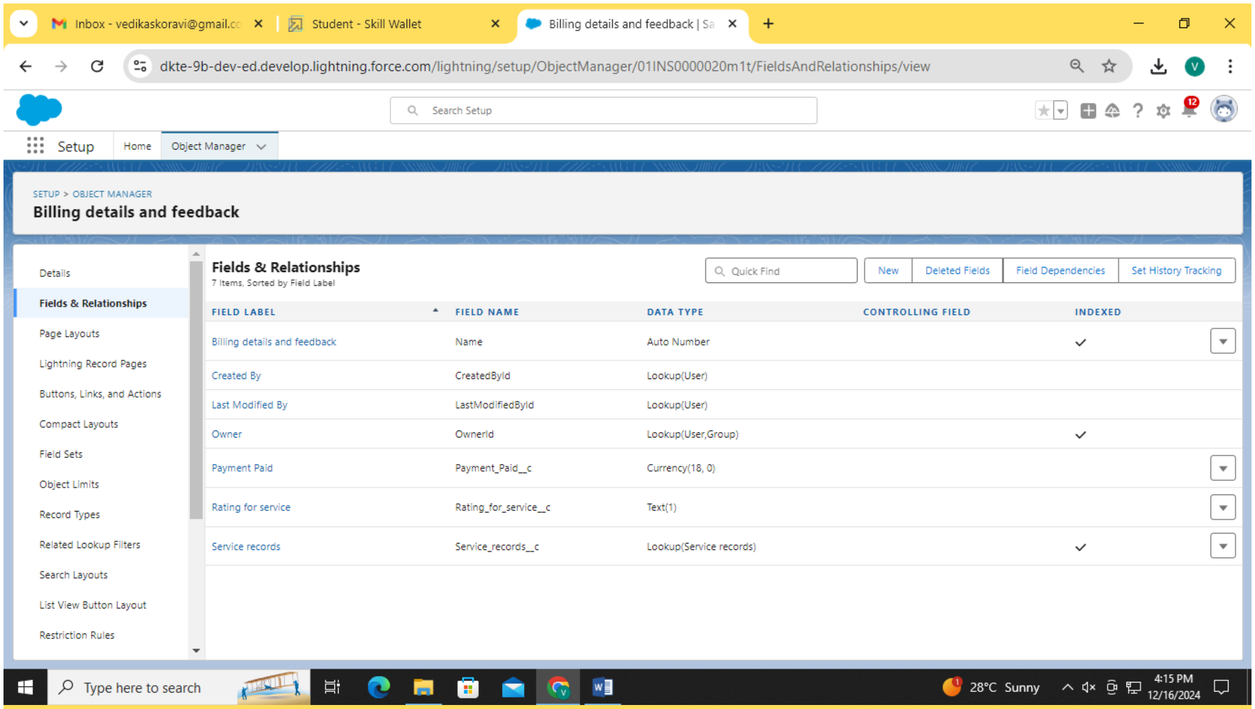

Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Service records | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020kL4/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Service records
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Previous
Next
Cancel
Field Label
Service Status
Values
Use global picklist value set
Enter values, with each value separated by a new line
Started
Completed
Display values alphabetically, not in the order entered
Use first value as default value
Restrict picklist to the values defined in the value set
Field Name
Service_Status
Description
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
Type here to search
28°C Sunny
4:14 PM
12/16/2024


Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Service records | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020kL4/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Service records
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Service records
New Custom Field
Help for this Page
Step 3. Establish field-level security
Step 3 of 4
Previous
Next
Cancel
Field Label Service Status
Data Type Picklist
Field Name Service_Status
Description
Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.
Field-Level Security for Profile
Visible
Read-Only
Analytics Cloud Integration User
Analytics Cloud Security User
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Type here to search
28°C Sunny
4:14 PM
12/16/2024

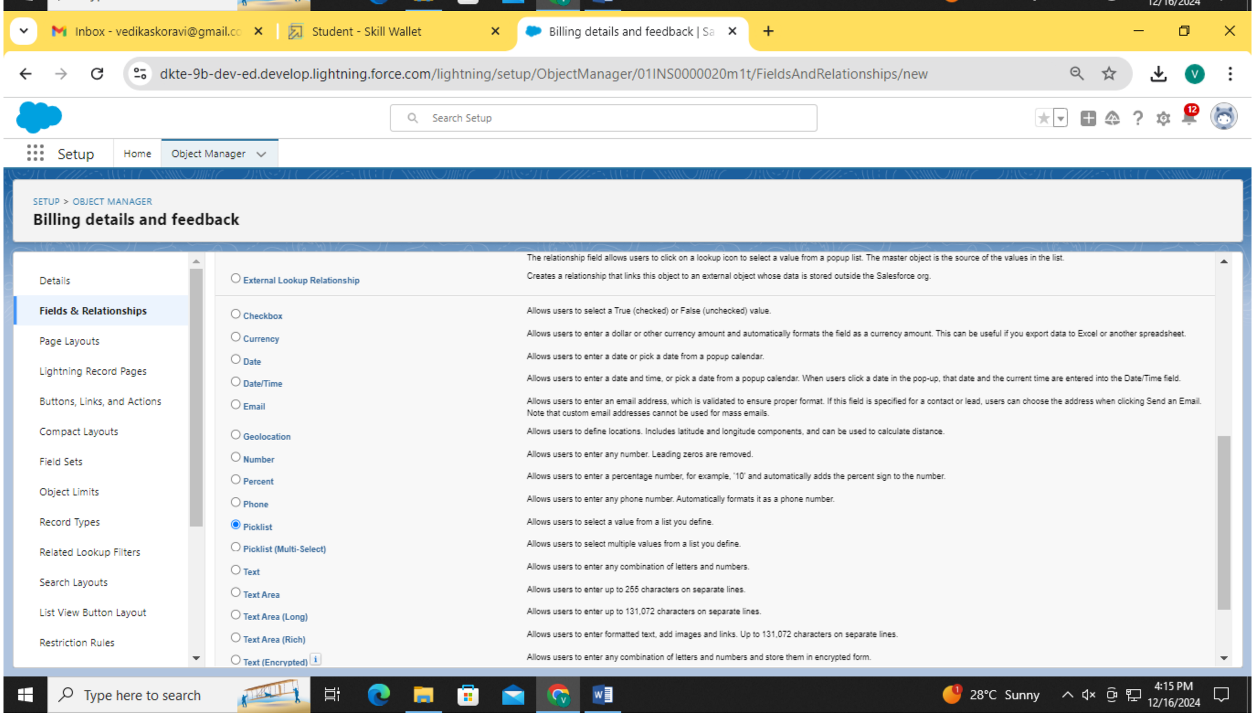

Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Service records | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020kL4/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Service records
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Service records
New Custom Field
Help for this Page
Step 4. Add to page layouts
Step 4 of 4
Previous
Save & New
Save
Cancel
Field Label Service Status
Data Type Picklist
Field Name Service_Status
Description
Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.
To change the location of this field on the page, you will need to customize the page layout.
Add Field
Page Layout Name
Service records Layout
When finished, click Save & New to create more custom fields, or click Save if you are done.
Previous
Save & New
Save
Cancel
Type here to search
28°C Sunny
4:14 PM
12/16/2024


Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Service records | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020kL4/FieldsAndRelationships/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Service records
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Fields & Relationships
6 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Created By
CreatedById
Lookup(User)
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
Type here to search
28°C Sunny
4:14 PM
12/16/2024

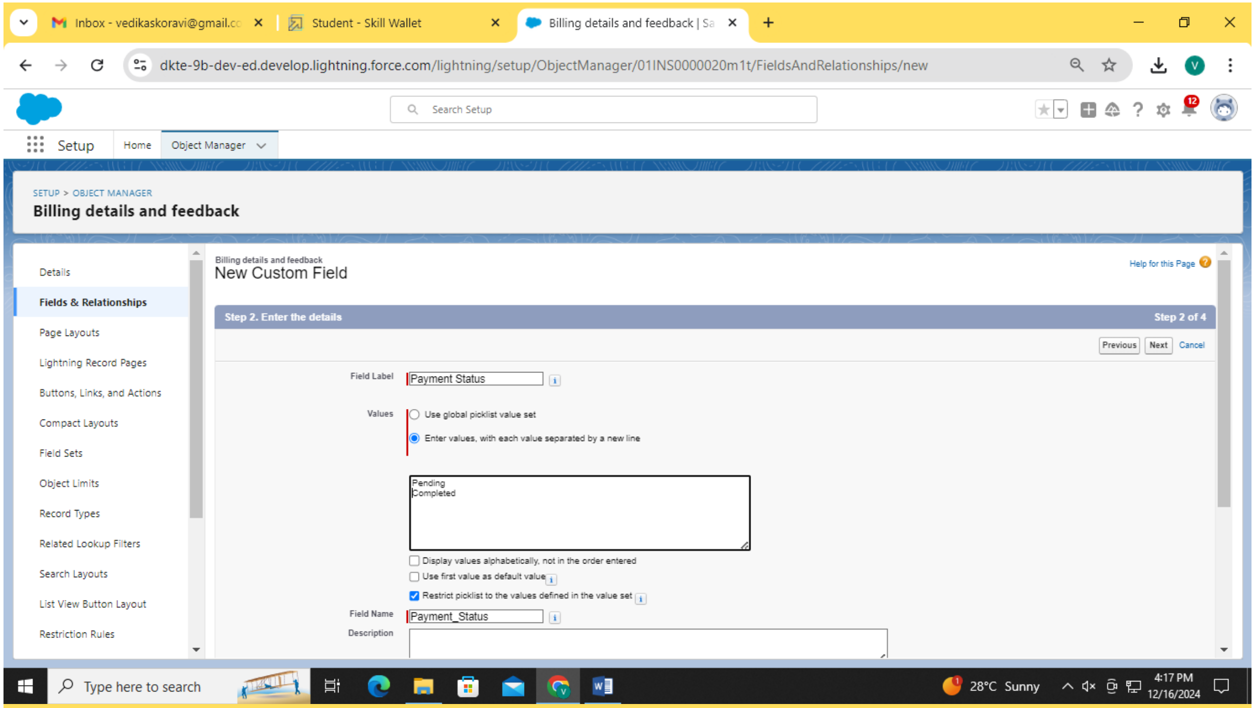

Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Object Manager | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/home
Search Setup
Setup
Home
Object Manager
SETUP
Object Manager
1 Items, Sorted by Label
Billing details and feec
Schema Builder
Create
LABEL
API NAME
TYPE
DESCRIPTION
LAST MODIFIED
DEPLOYED
Billing details and feedback
Billing_details_and_feedback__c
Custom Object
17/12/2024
Type here to search
28°C Sunny
4:15 PM
12/16/2024



Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Billing details and feedback | Sa
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020m1t/FieldsAndRelationships/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing details and feedback
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Fields & Relationships
7 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
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)
Type here to search
28°C Sunny
4:15 PM
12/16/2024



Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Billing details and feedback | Sa
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020m1t/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing details and feedback
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
External Lookup Relationship
Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
Checkbox
Allows users to select a True (checked) or False (unchecked) value.
Currency
Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
Date
Allows users to enter a date or pick a date from a popup calendar.
Date/Time
Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Email
Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation
Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Number
Allows users to enter any number. Leading zeros are removed.
Percent
Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone
Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist
Allows users to select a value from a list you define.
Picklist (Multi-Select)
Allows users to select multiple values from a list you define.
Text
Allows users to enter any combination of letters and numbers.
Text Area
Allows users to enter up to 255 characters on separate lines.
Text Area (Long)
Allows users to enter up to 131,072 characters on separate lines.
Text Area (Rich)
Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
Text (Encrypted)
Allows users to enter any combination of letters and numbers and store them in encrypted form.
Type here to search
28°C Sunny
4:15 PM
12/16/2024


Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Billing details and feedback | Sa
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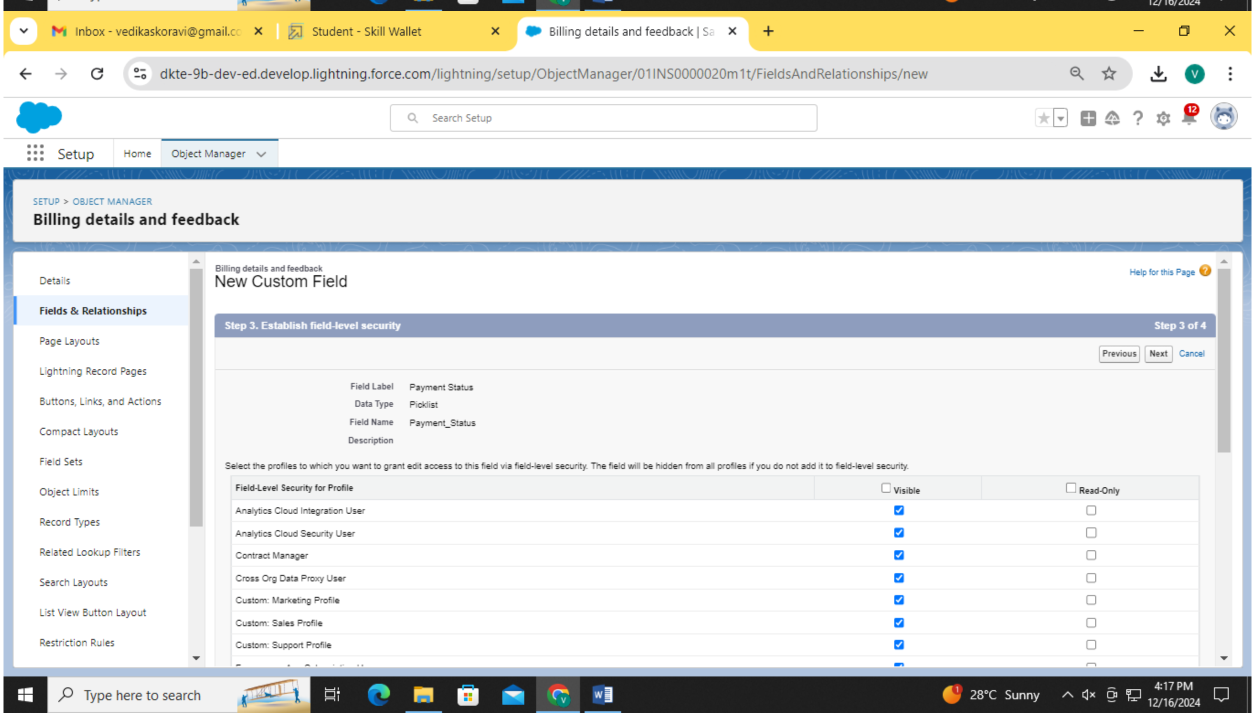
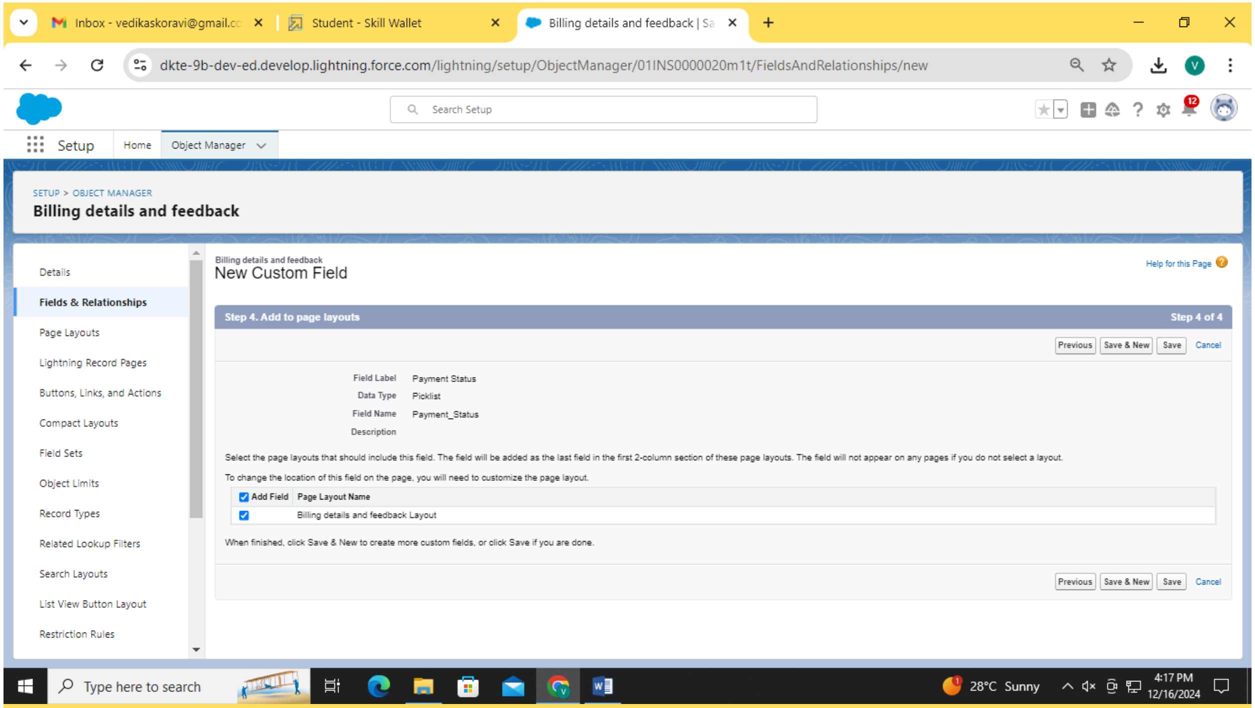
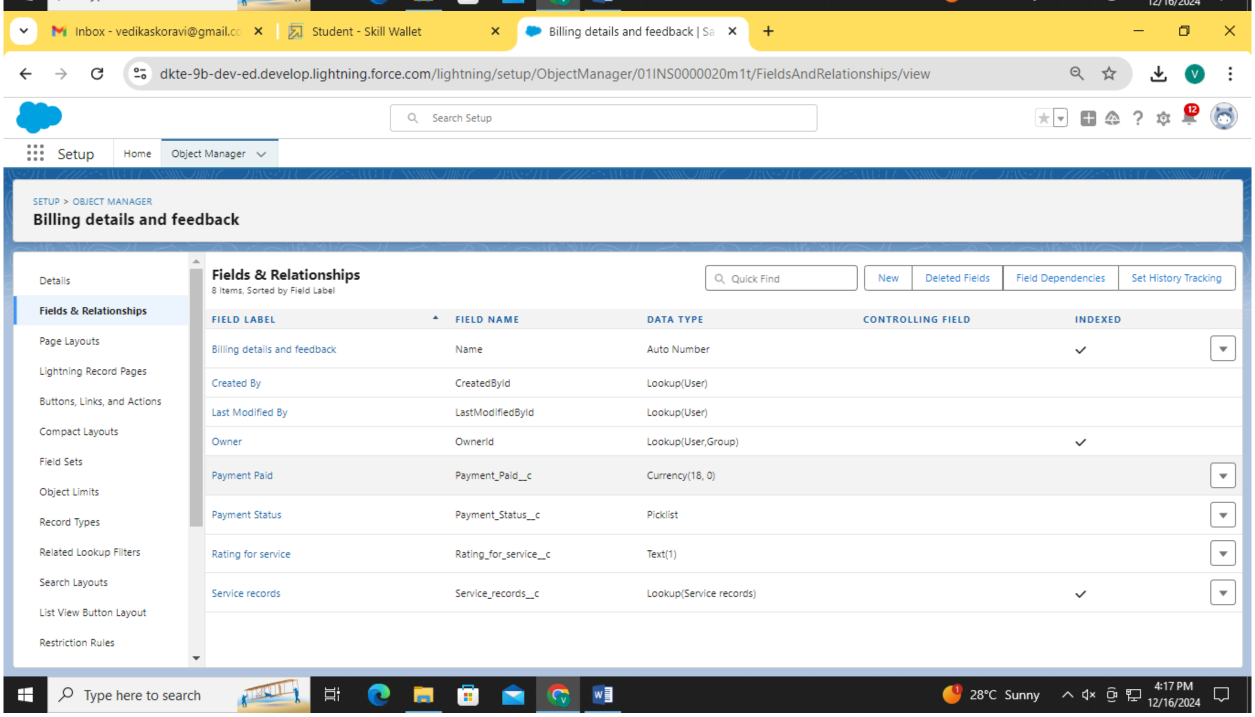
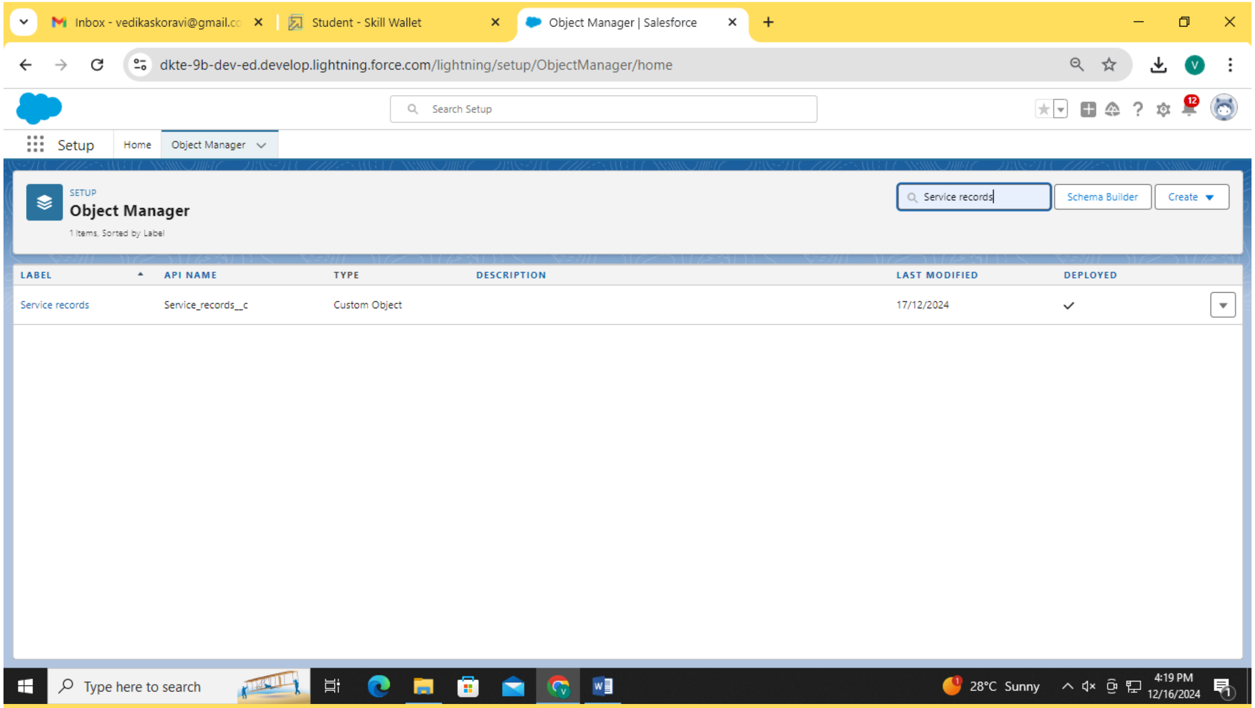
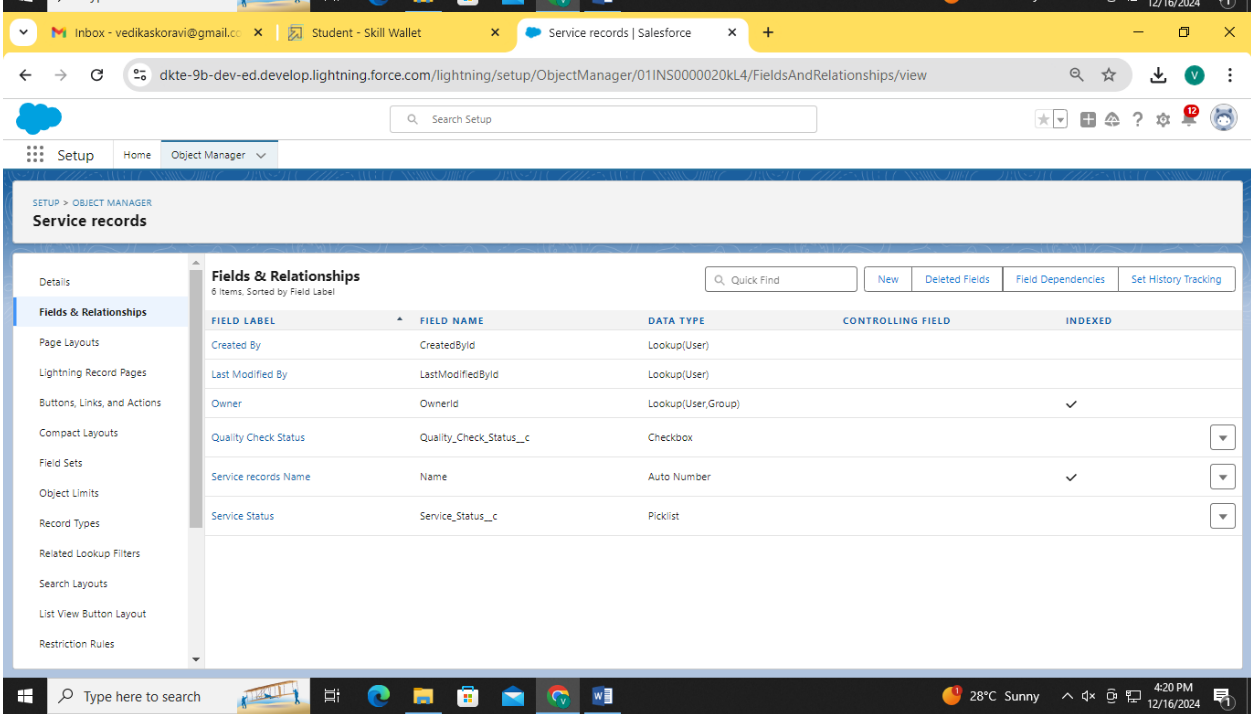
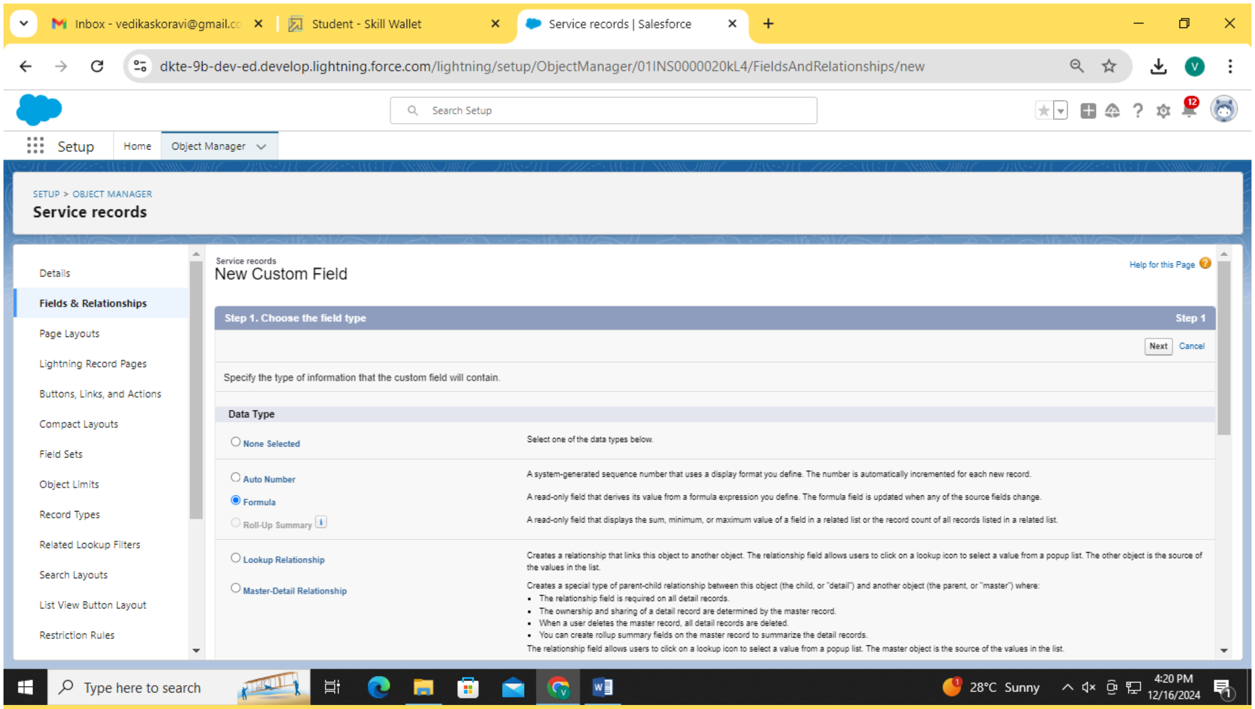
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing details and feedback
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Billing details and feedback
New Custom Field
Help for this Page
Step 2. Enter the details
Step 2 of 4
Previous
Next
Cancel
Field Label
Payment Status
Values
Use global picklist value set
Enter values, with each value separated by a new line
Pending
Completed
Display values alphabetically, not in the order entered
Use first value as default value
Restrict picklist to the values defined in the value set
Field Name
Payment_Status
Description
Type here to search
28°C Sunny
4:17 PM
12/16/2024

Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Billing details and feedback | Sa
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020m1t/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing details and feedback
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Billing details and feedback
New Custom Field
Help for this Page
Step 3. Establish field-level security
Step 3 of 4
Previous
Next
Cancel
Field Label Payment Status
Data Type Picklist
Field Name Payment_Status
Description
Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.
Field-Level Security for Profile
Visible
Read-Only
Analytics Cloud Integration User
Analytics Cloud Security User
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Type here to search
28°C Sunny
4:17 PM
12/16/2024

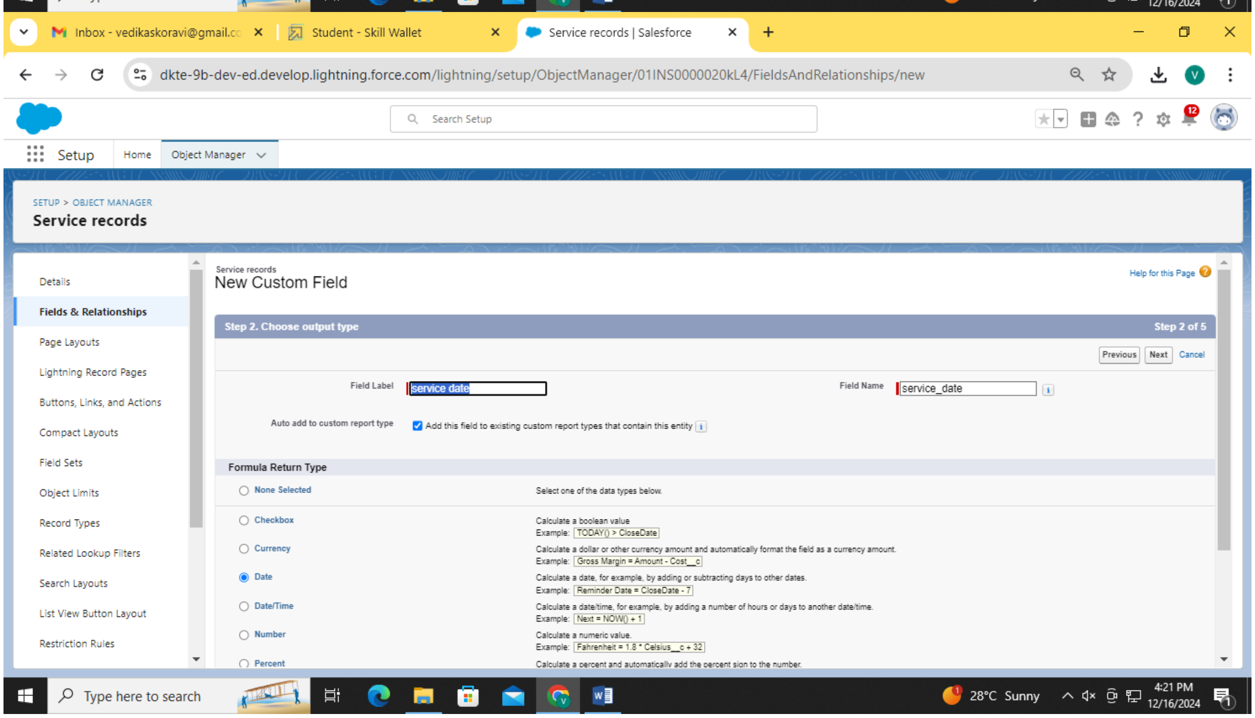

Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Billing details and feedback | Sa
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020m1t/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing details and feedback
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Billing details and feedback
New Custom Field
Help for this Page
Step 4. Add to page layouts
Step 4 of 4
Previous
Save & New
Save
Cancel
Field Label Payment 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.
Type here to search
28°C Sunny
4:17 PM
12/16/2024

Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Billing details and feedback | Sa
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020m1t/FieldsAndRelationships/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing details and feedback
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Fields & Relationships
8 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
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)
Type here to search
28°C Sunny
4:17 PM
12/16/2024

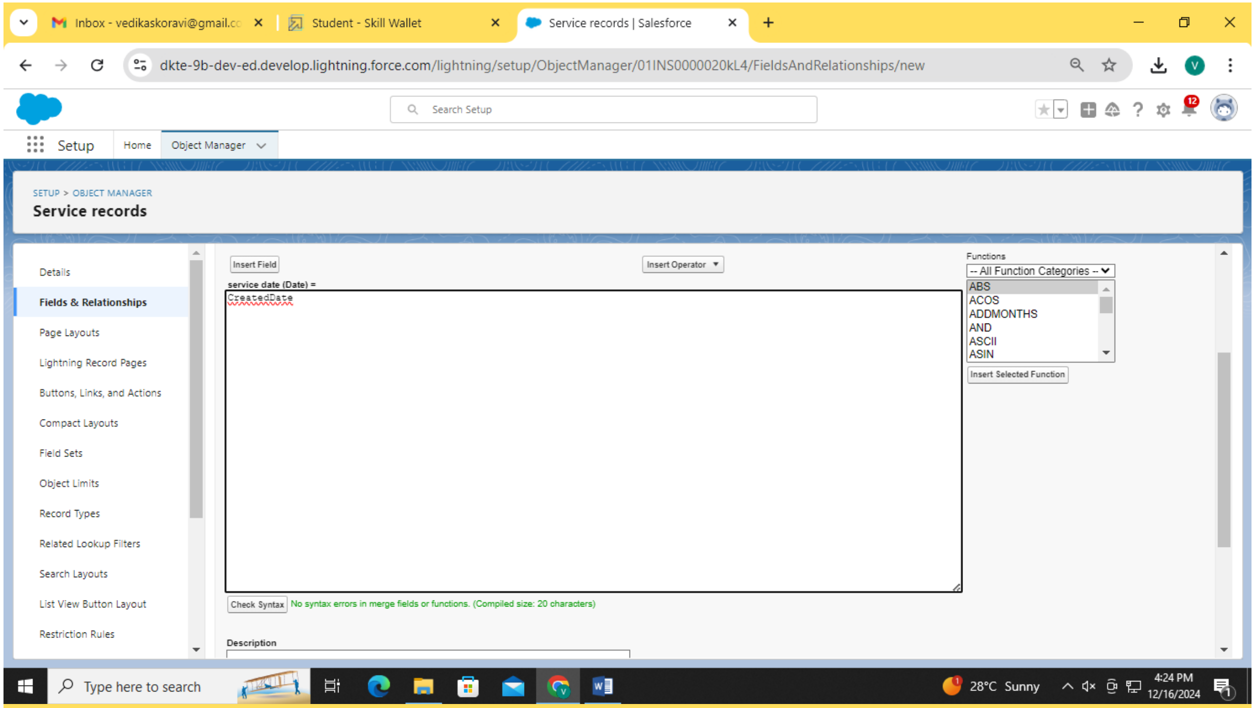
Creating Formula Field in Service records Object






Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Service records | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020kL4/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Service records
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Service records
New Custom Field
Help for this Page
Step 1. Choose the field type
Step 1
Next
Cancel
Specify the type of information that the custom field will contain.
Data Type
None Selected
Select one of the data types below.
Auto Number
A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
Formula
A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
Roll-Up Summary
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
Lookup Relationship
Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
Master-Detail Relationship
Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
The relationship field is required on all detail records.
The ownership and sharing of a detail record are determined by the master record.
When a user deletes the master record, all detail records are deleted.
You can create rollup summary fields on the master record to summarize the detail records.
The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
Type here to search
28°C Sunny
4:20 PM
12/16/2024


Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Service records | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020kL4/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Service records
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Service records
New Custom Field
Help for this Page
Step 2. Choose output type
Step 2 of 5
Previous
Next
Cancel
Field Label
service date
Field Name
service_date
Auto add to custom report type
Add this field to existing custom report types that contain this entity
Formula Return Type
None Selected
Select one of the data types below.
Checkbox
Calculate a boolean value
Example: TODAY() > CloseDate
Currency
Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: Gross Margin = Amount - Cost__c
Date
Calculate a date, for example, by adding or subtracting days to other dates.
Example: Reminder Date = CloseDate - 7
Date/Time
Calculate a date/time, for example, by adding a number of hours or days to another date/time.
Example: Next = NOW() + 1
Number
Calculate a numeric value.
Example: Fahrenheit = 1.8 * Celsius__c + 32
Percent
Calculate a percent and automatically add the percent sign to the number.
Type here to search
28°C Sunny
4:21 PM
12/16/2024


Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Service records | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020kL4/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Service records
Details
Fields & Relationships
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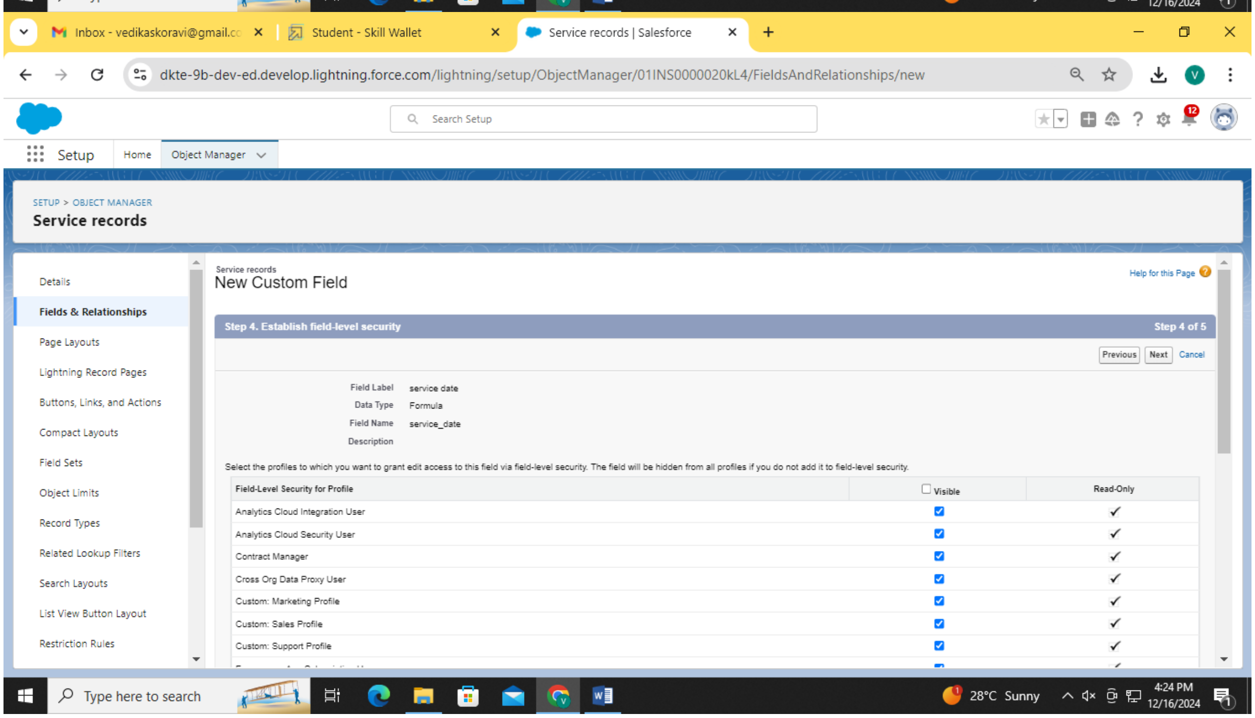
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Insert Field
Insert Operator
Functions
-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function
service date (Date) =
CreatedDate
Check Syntax
No syntax errors in merge fields or functions. (Compiled size: 20 characters)
Description
Type here to search
28°C Sunny
4:24 PM
12/16/2024


Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Service records | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020kL4/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Service records
Details
Fields & Relationships
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Compact Layouts
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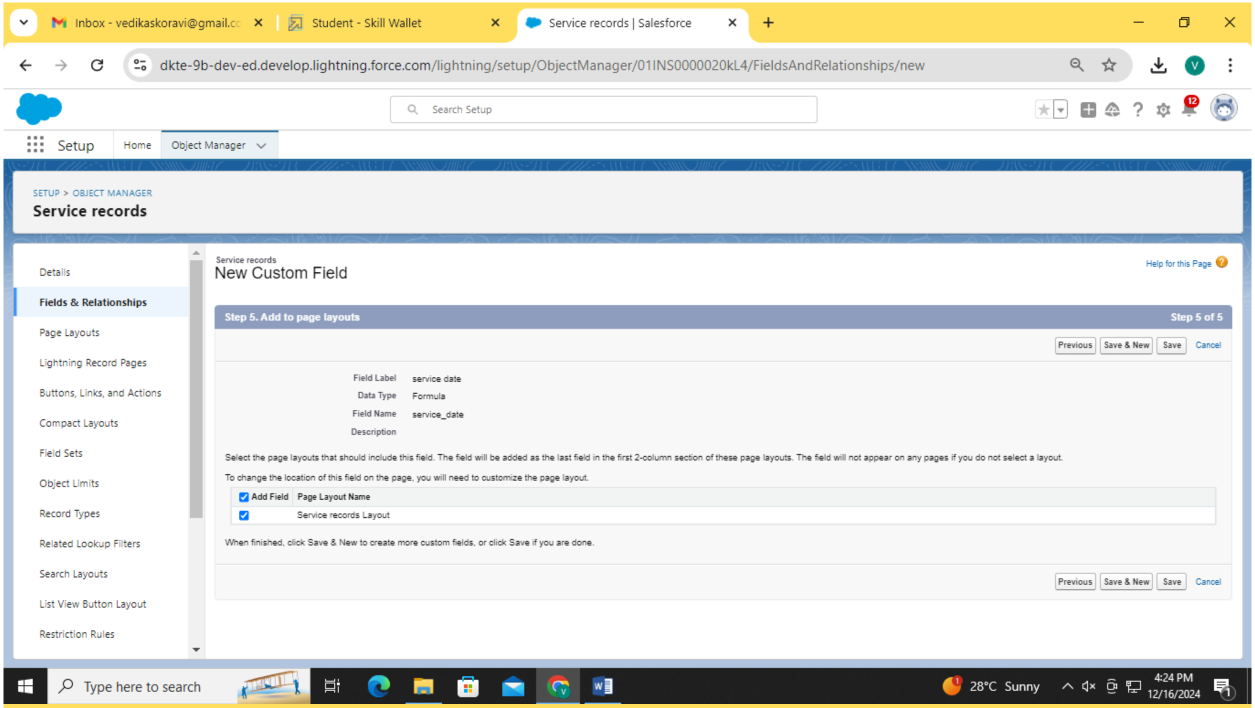
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Service records
New Custom Field
Help for this Page
Step 4. Establish field-level security
Step 4 of 5
Previous
Next
Cancel
Field Label service date
Data Type Formula
Field Name service_date
Description
Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.
Field-Level Security for Profile
Visible
Read-Only
Analytics Cloud Integration User
Analytics Cloud Security User
Contract Manager
Cross Org Data Proxy User
Custom: Marketing Profile
Custom: Sales Profile
Custom: Support Profile
Type here to search
28°C Sunny
4:24 PM
12/16/2024


Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Service records | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020kL4/FieldsAndRelationships/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Service records
Details
Fields & Relationships
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Lightning Record Pages
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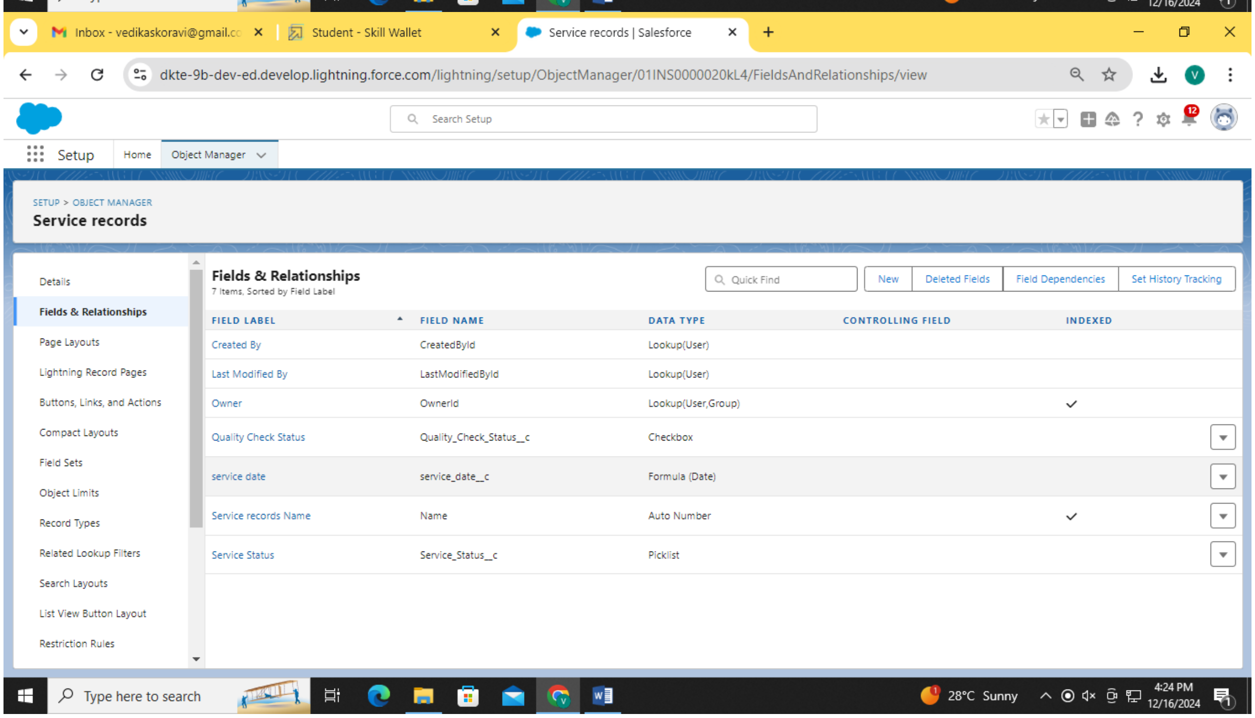
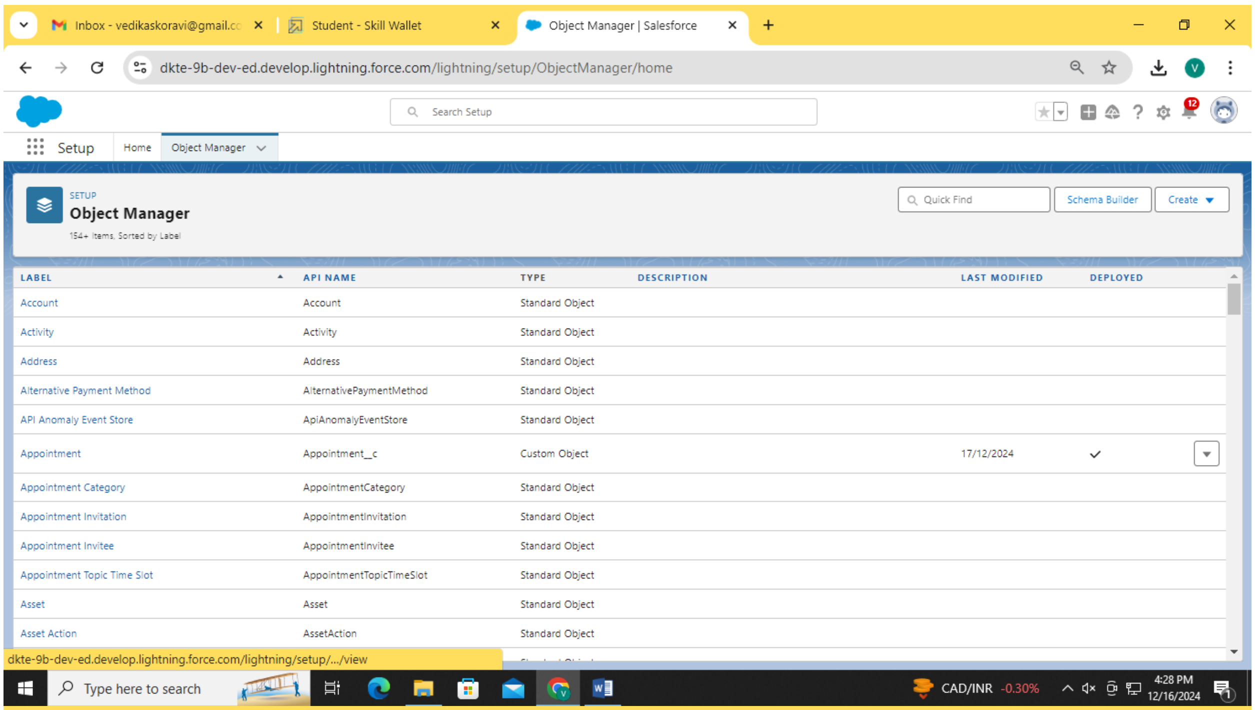
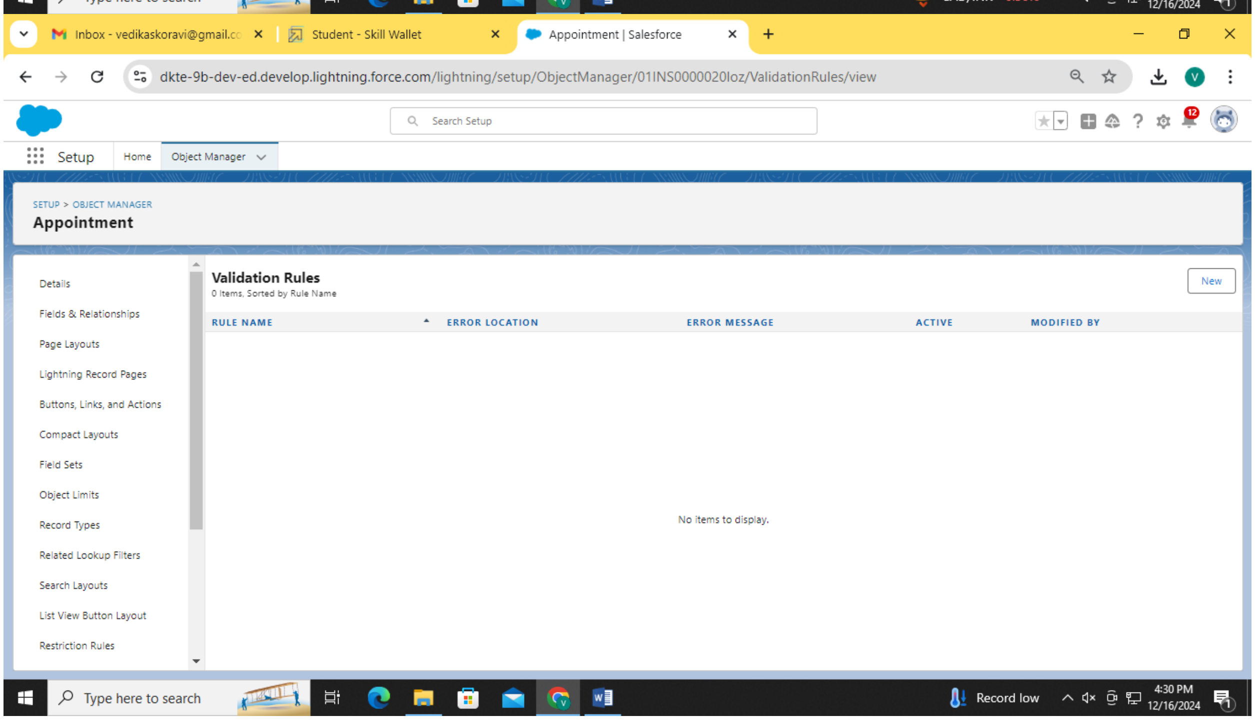
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Service records
New Custom Field
Help for this Page
Step 5. Add to page layouts
Step 5 of 5
Previous
Save & New
Save
Cancel
Field Label service date
Data Type Formula
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.
Type here to search
28°C Sunny
4:24 PM
12/16/2024

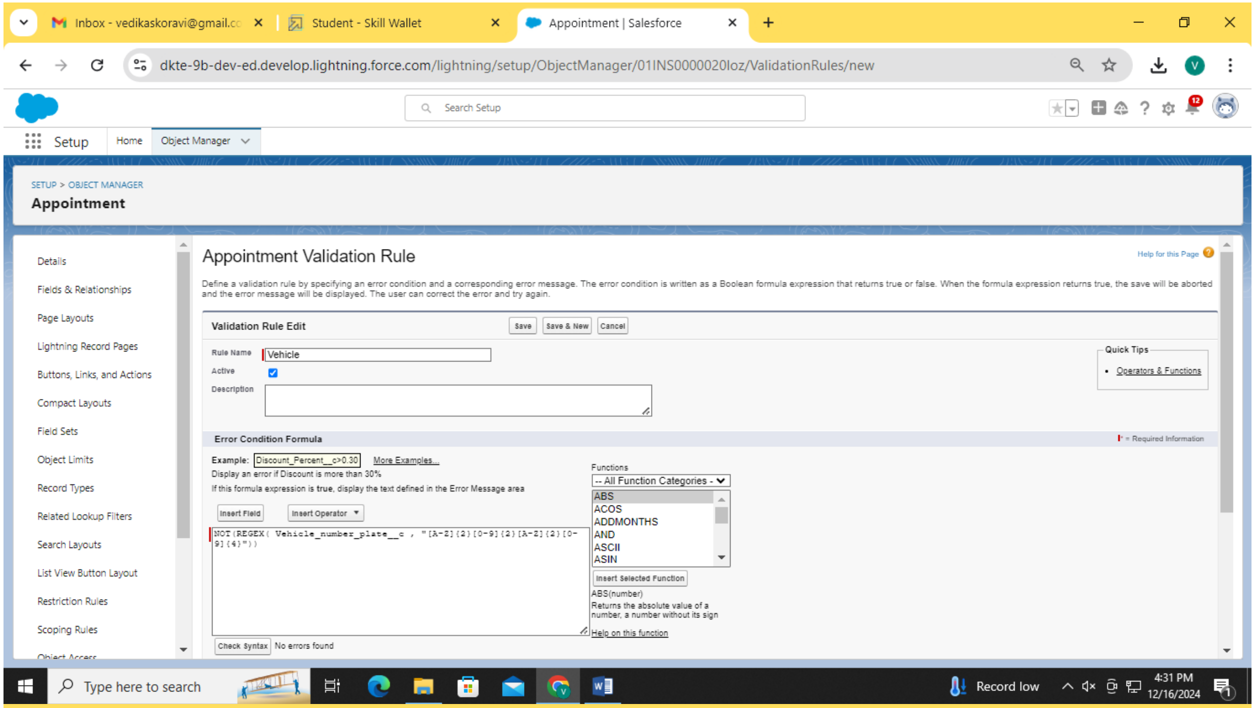

Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Service records | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020kL4/FieldsAndRelationships/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Service records
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Fields & Relationships
7 Items, Sorted by Field Label
Quick Find
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
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
Type here to search
28°C Sunny
4:24 PM
12/16/2024

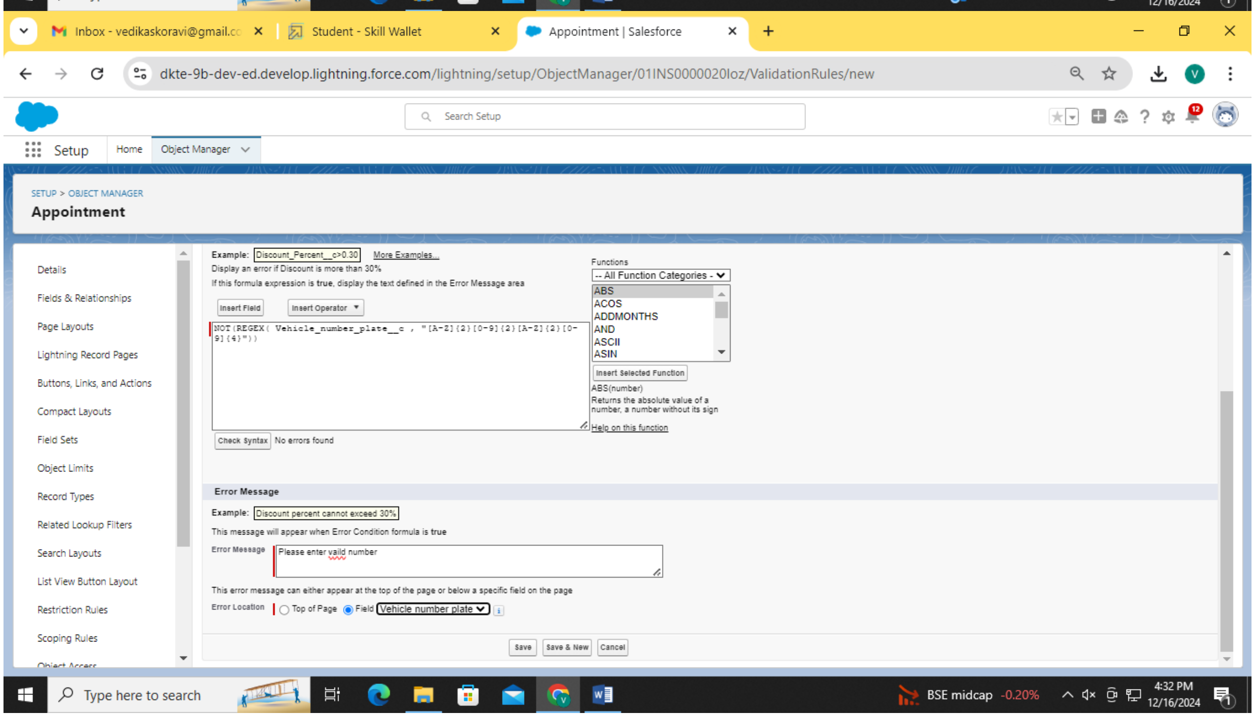
Validation rule

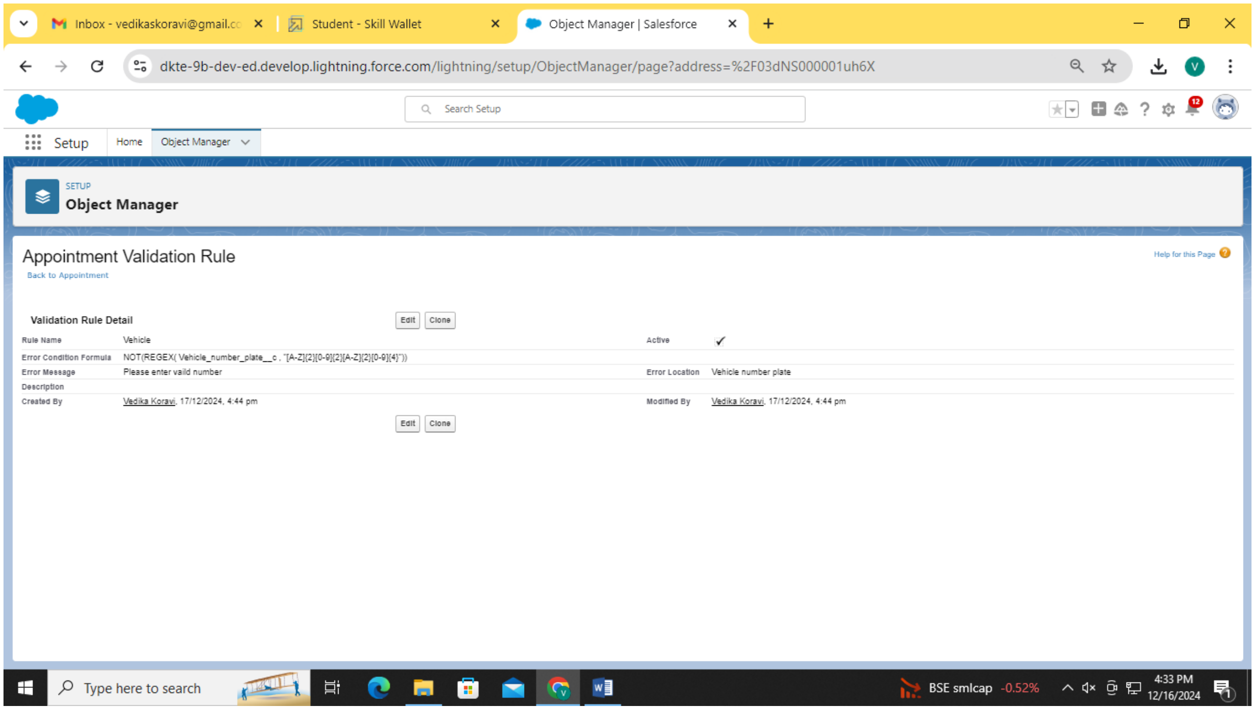
To create a validation rule to an Appointment Object



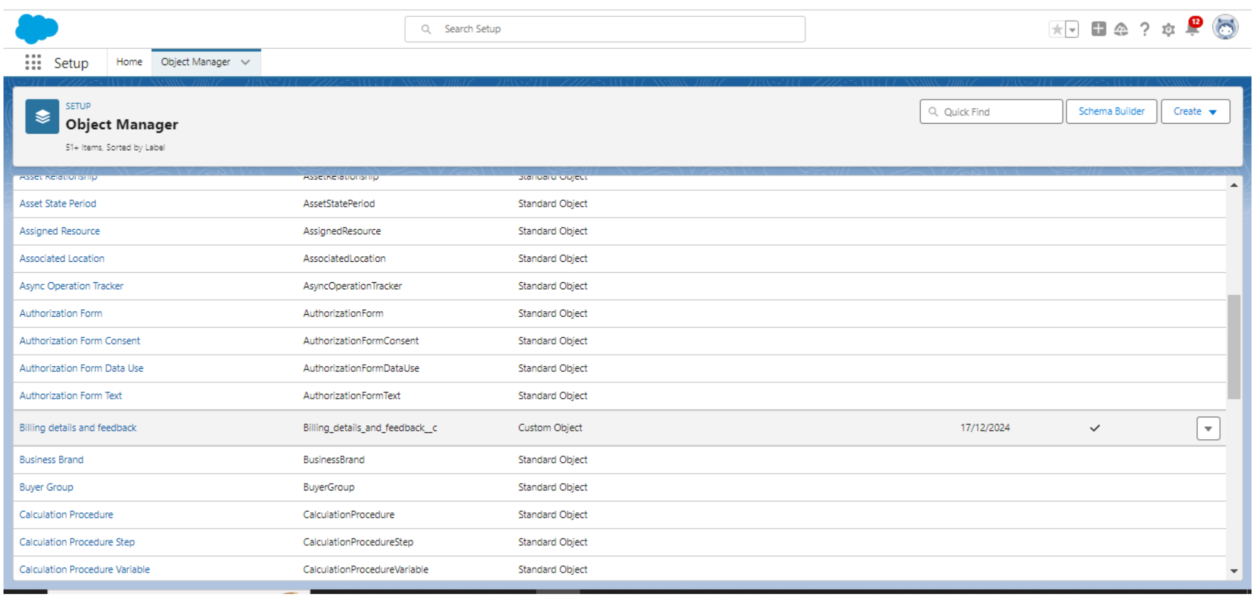


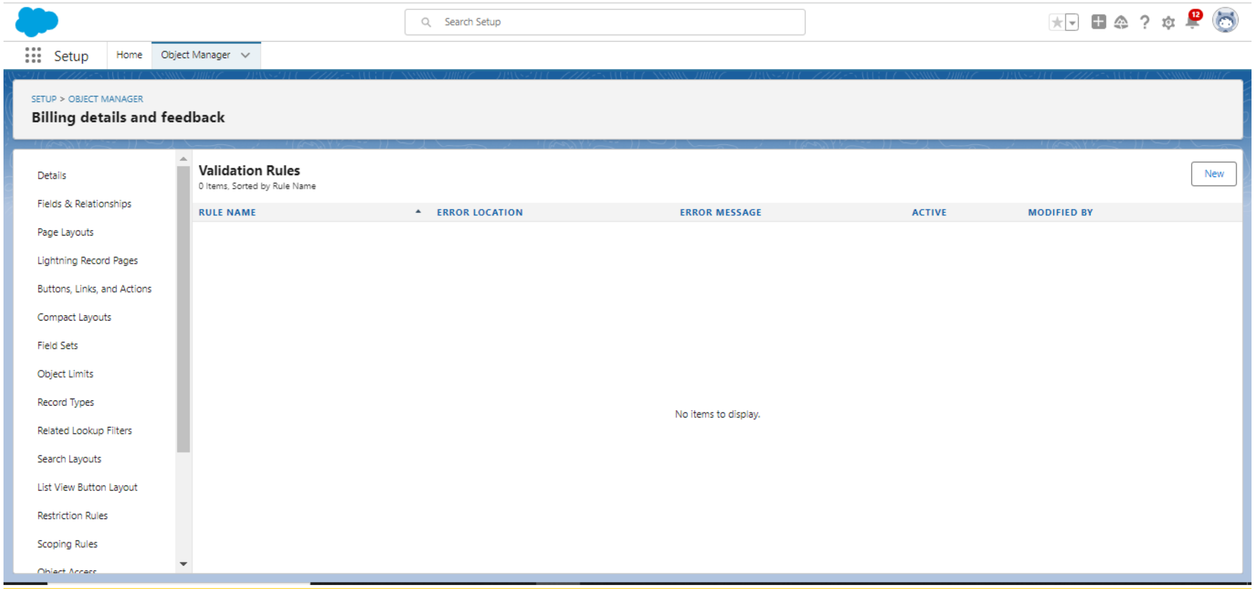

Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Appointment | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020loz/ValidationRules/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Appointment Validation Rule
Help for this Page
Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.
Validation Rule Edit
Save
Save & New
Cancel
Rule Name
Vehicle
Active
Description
Quick Tips
Operators & Functions
Error Condition Formula
= Required Information
Example: Discount_Percent__c>0.30
More Examples...
Display an error if Discount is more than 30%
If this formula expression is true, display the text defined in the Error Message area
Insert Field
Insert Operator
NOT(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
Insert Selected Function
ABS(number)
Returns the absolute value of a number, a number without its sign
Help on this function
Check Syntax
No errors found
Type here to search
Record low
4:31 PM
12/16/2024

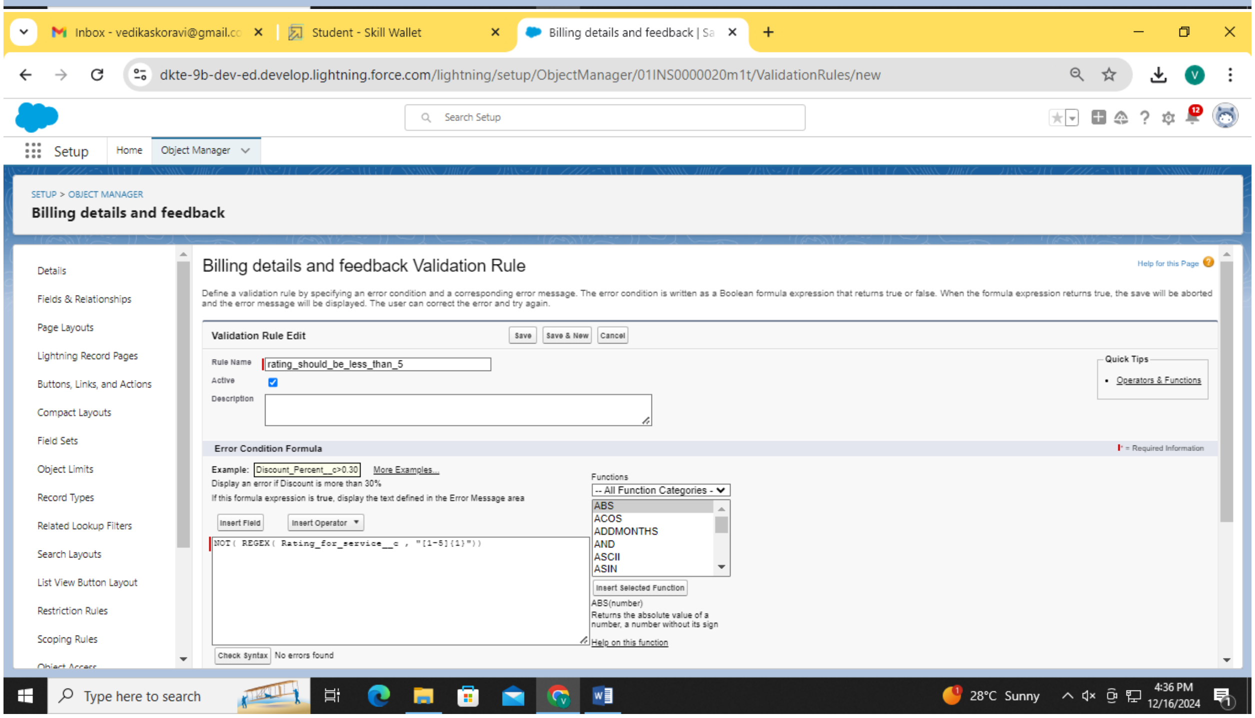

Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Appointment | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020loz/ValidationRules/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Example: Discount_Percent__c>0.30
More Examples...
Display an error if Discount is more than 30%
If this formula expression is true, display the text defined in the Error Message area
Insert Field
Insert Operator
NOT(REGEX(Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))
Functions
-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function
ABS(number)
Returns the absolute value of a number, a number without its sign
Help on this function
Check Syntax
No errors found
Error Message
Example: Discount percent cannot exceed 30%
This message will appear when Error Condition formula is true
Error Message
Please enter vaild number
This error message can either appear at the top of the page or below a specific field on the page
Error Location
Top of Page
Field
Vehicle number plate
Save
Save & New
Cancel
Type here to search
BSE midcap -0.20%
4:32 PM
12/16/2024

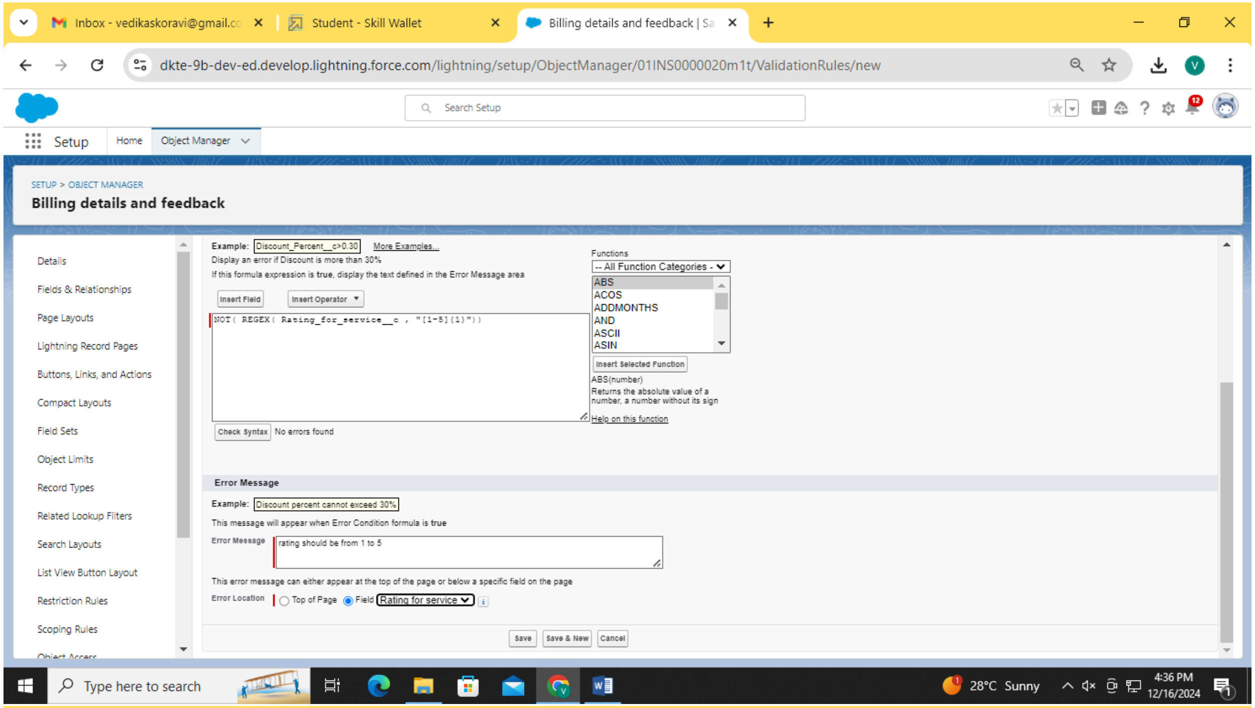


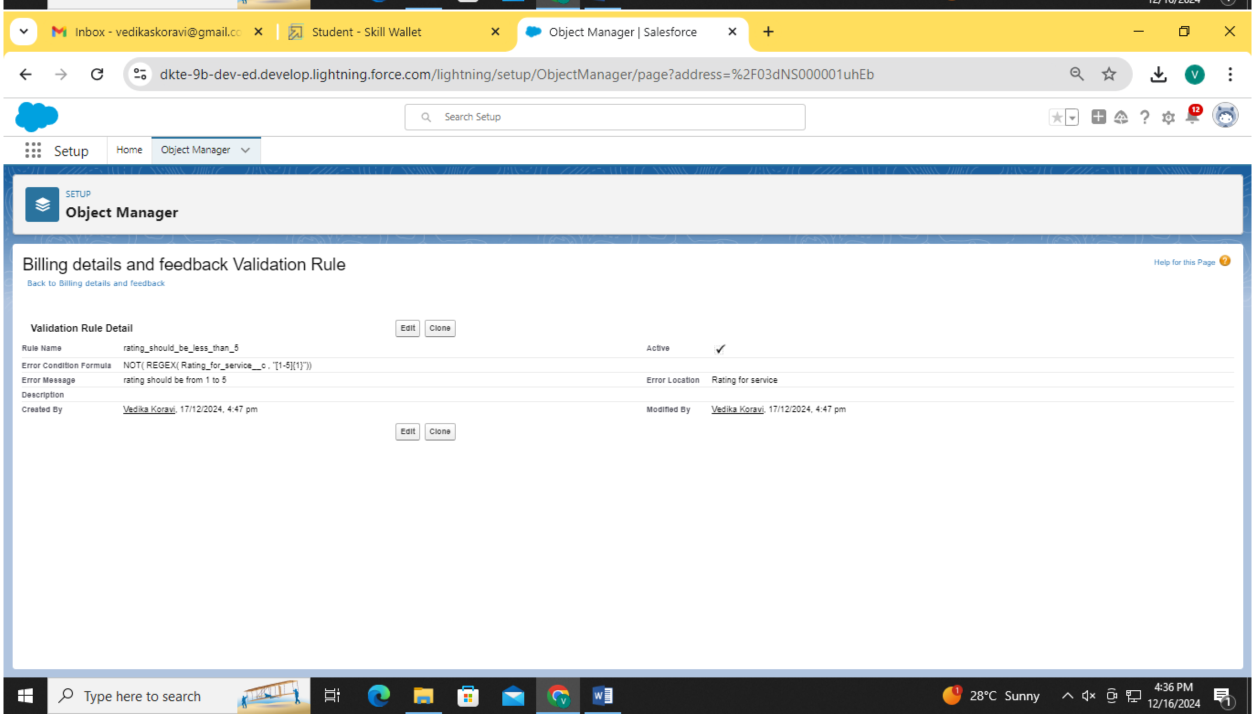
To create a validation rule to an Billing details and feedback Object




Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing details and feedback
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Validation Rules
0 Items, Sorted by Rule Name
New
RULE NAME
ERROR LOCATION
ERROR MESSAGE
ACTIVE
MODIFIED BY
No items to display.

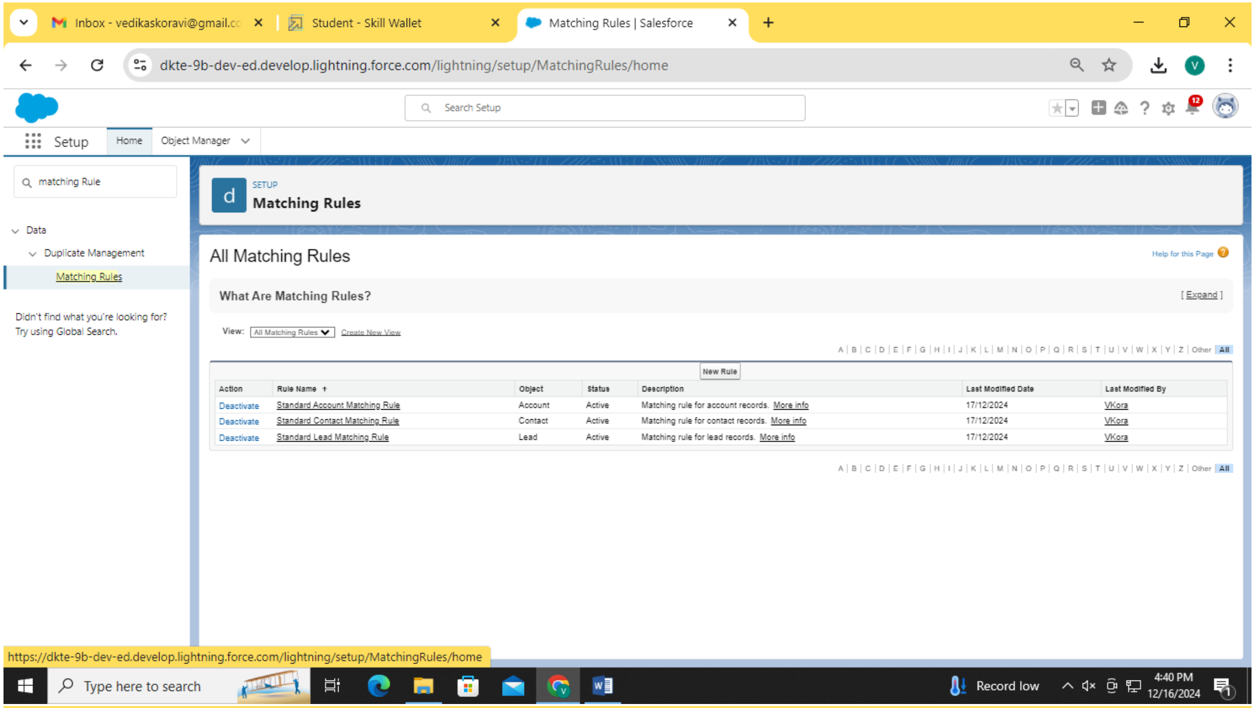

Inbox - vedikaskoravi@gmail.cc
Student - Skill Wallet
Billing details and feedback | Sa
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000020m1t/ValidationRules/new
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Billing details and feedback
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Billing details and feedback Validation Rule
Help for this Page
Define a validation rule by specifying an error condition and a corresponding error message. The error condition is written as a Boolean formula expression that returns true or false. When the formula expression returns true, the save will be aborted and the error message will be displayed. The user can correct the error and try again.
Validation Rule Edit
Save
Save & New
Cancel
Rule Name
rating_should_be_less_than_5
Active
Description
Quick Tips
Operators & Functions
Error Condition Formula
= Required Information
Example: Discount_Percent__c>0.30
More Examples...
Display an error if Discount is more than 30%
If this formula expression is true, display the text defined in the Error Message area
Insert Field
Insert Operator
NOT(REGEX(Rating_for_service__c , "[1-5]{1}"))
Functions
-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function
ABS(number)
Returns the absolute value of a number, a number without its sign
Help on this function
Check Syntax
No errors found
Type here to search
28°C Sunny
4:36 PM
12/16/2024

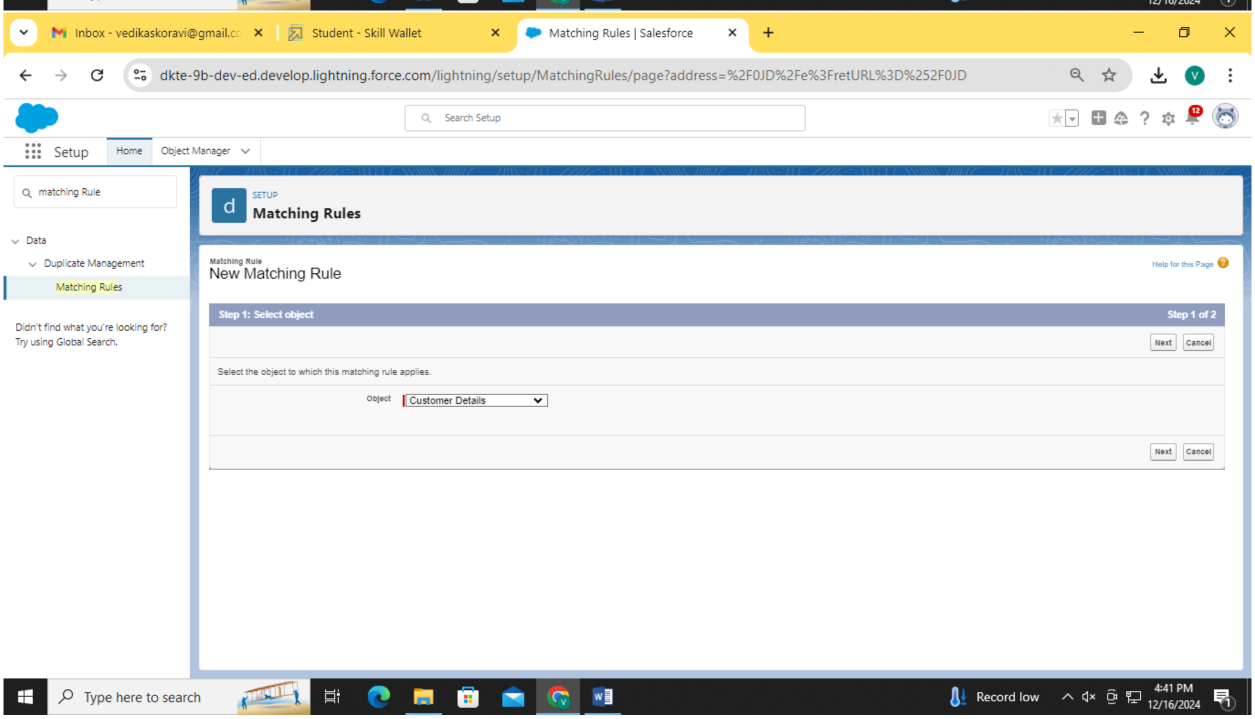


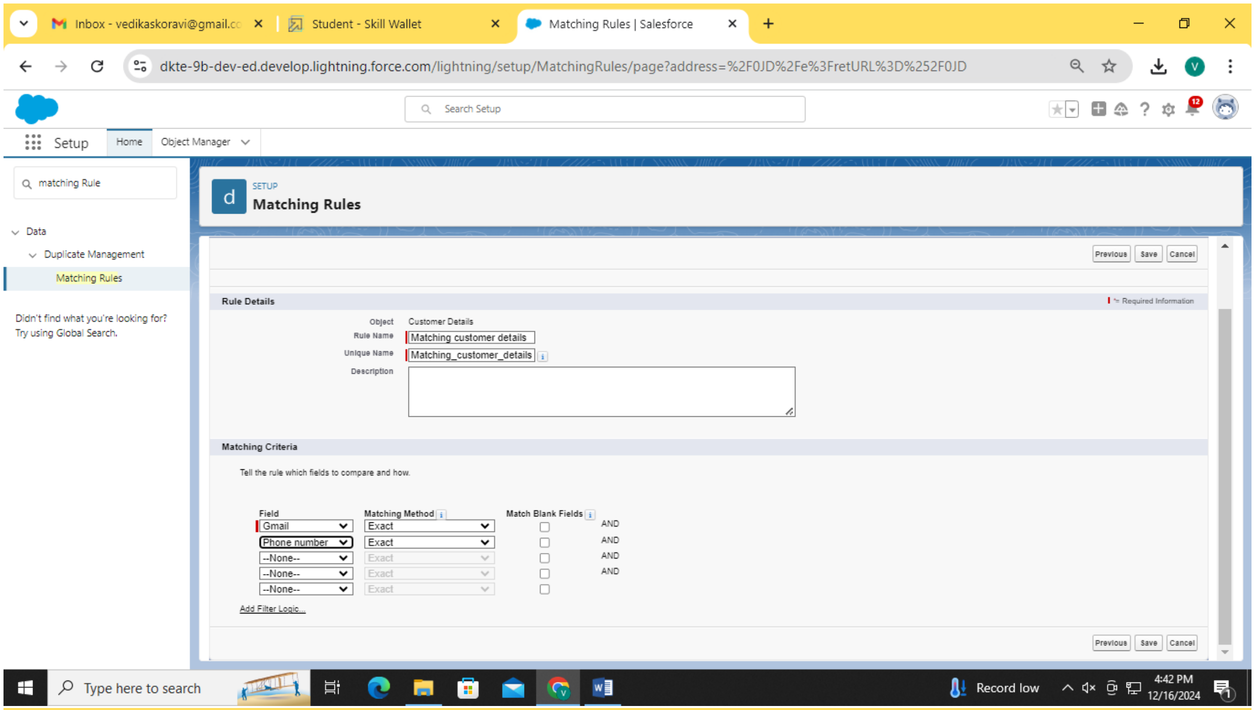


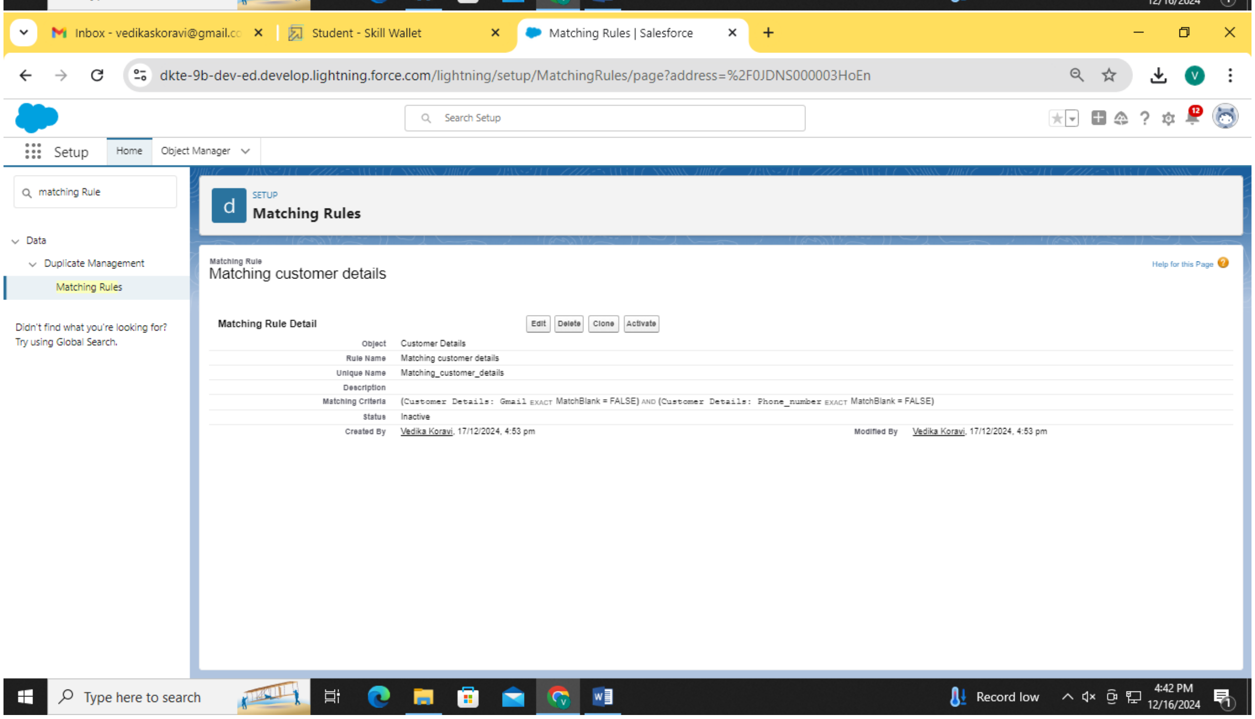
Duplicate rule

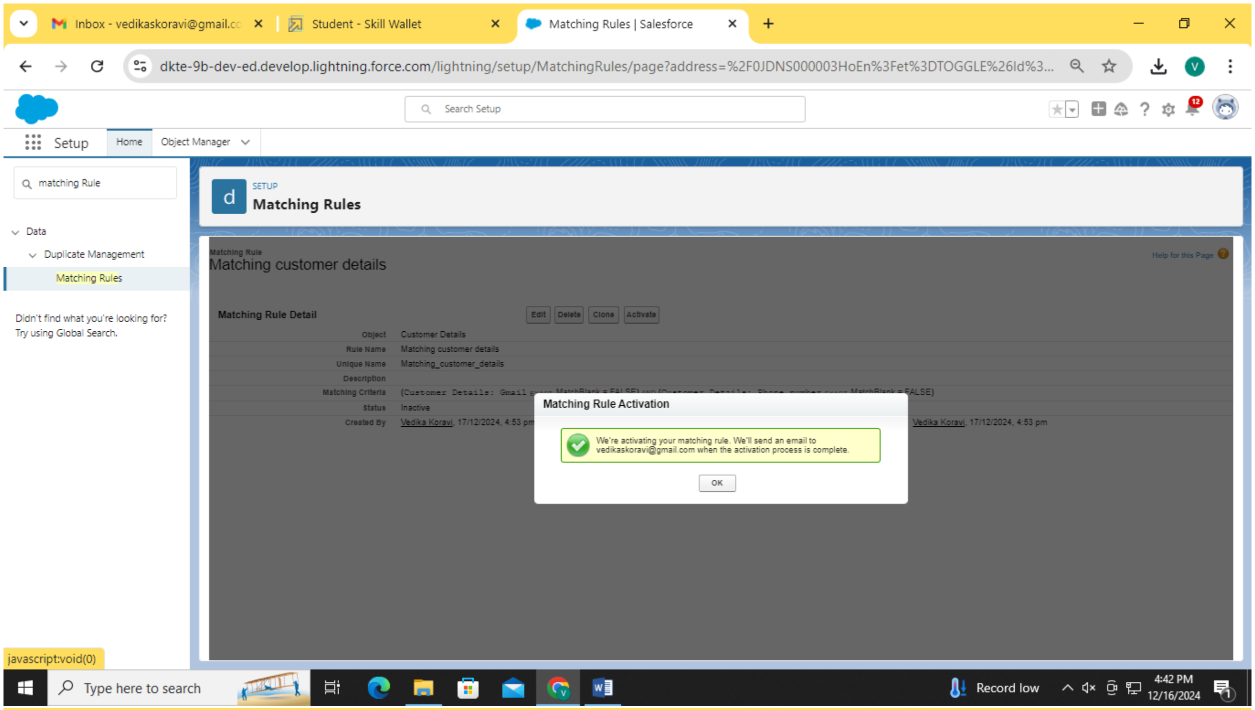
To create a matching rule to an Customer details Object

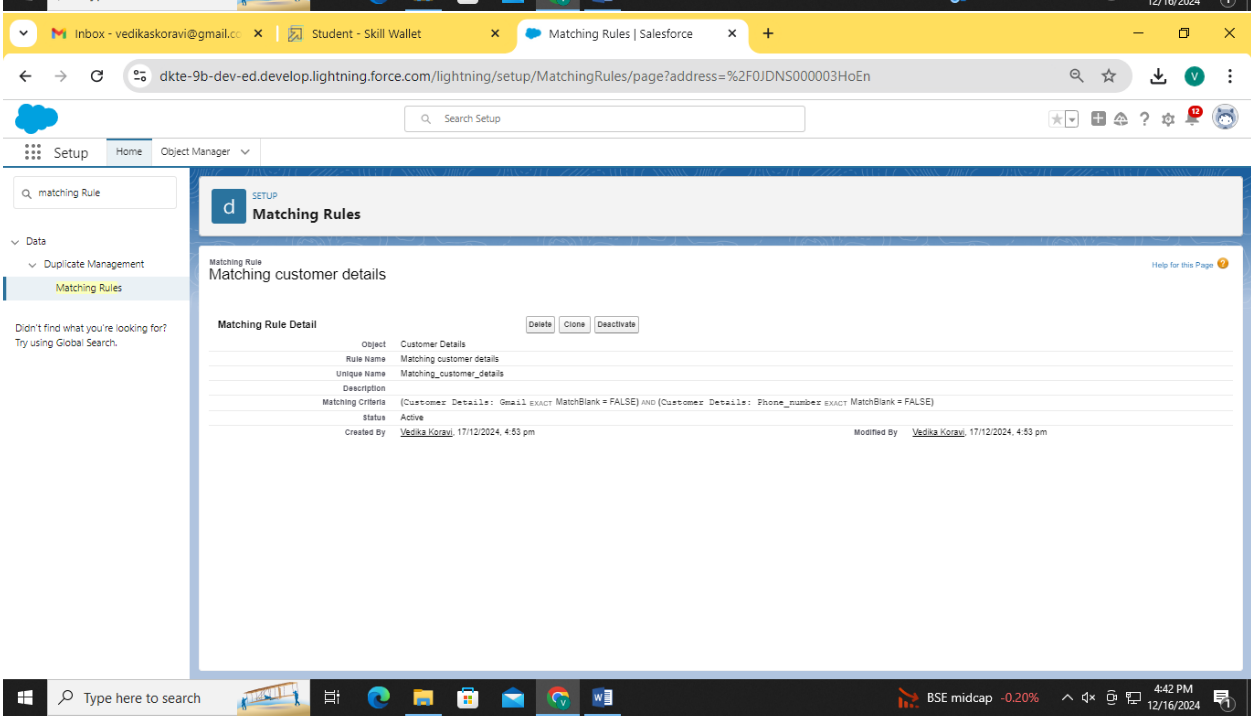

Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Matching Rules | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/MatchingRules/home
Search Setup
Setup
Home
Object Manager
matching Rule
Data
Duplicate Management
Matching Rules
Didn't find what you're looking for? Try using Global Search.
SETUP
Matching Rules
All Matching Rules
Help for this Page
What Are Matching Rules?
[Expand]
View: All Matching Rules
Create New View
New Rule
Action | Rule Name | Object | Status | Description | Last Modified Date | Last Modified By
Deactivate | Standard Account Matching Rule | Account | Active | Matching rule for account records. More info | 17/12/2024 | VKora
Deactivate | Standard Contact Matching Rule | Contact | Active | Matching rule for contact records. More info | 17/12/2024 | VKora
Deactivate | Standard Lead Matching Rule | Lead | Active | Matching rule for lead records. More info | 17/12/2024 | VKora
https://dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/MatchingRules/home
Type here to search
Record low
4:40 PM
12/16/2024


Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Matching Rules | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/MatchingRules/page?address=%2F0JD%2Fe%3FretURL%3D%252F0JD
Search Setup
Setup
Home
Object Manager
matching Rule
Data
Duplicate Management
Matching Rules
Didn't find what you're looking for? Try using Global Search.
SETUP
Matching Rules
Matching Rule
New Matching Rule
Help for this Page
Step 1: Select object
Step 1 of 2
Next
Cancel
Select the object to which this matching rule applies.
Object
Customer Details
Type here to search
Record low
4:41 PM
12/16/2024

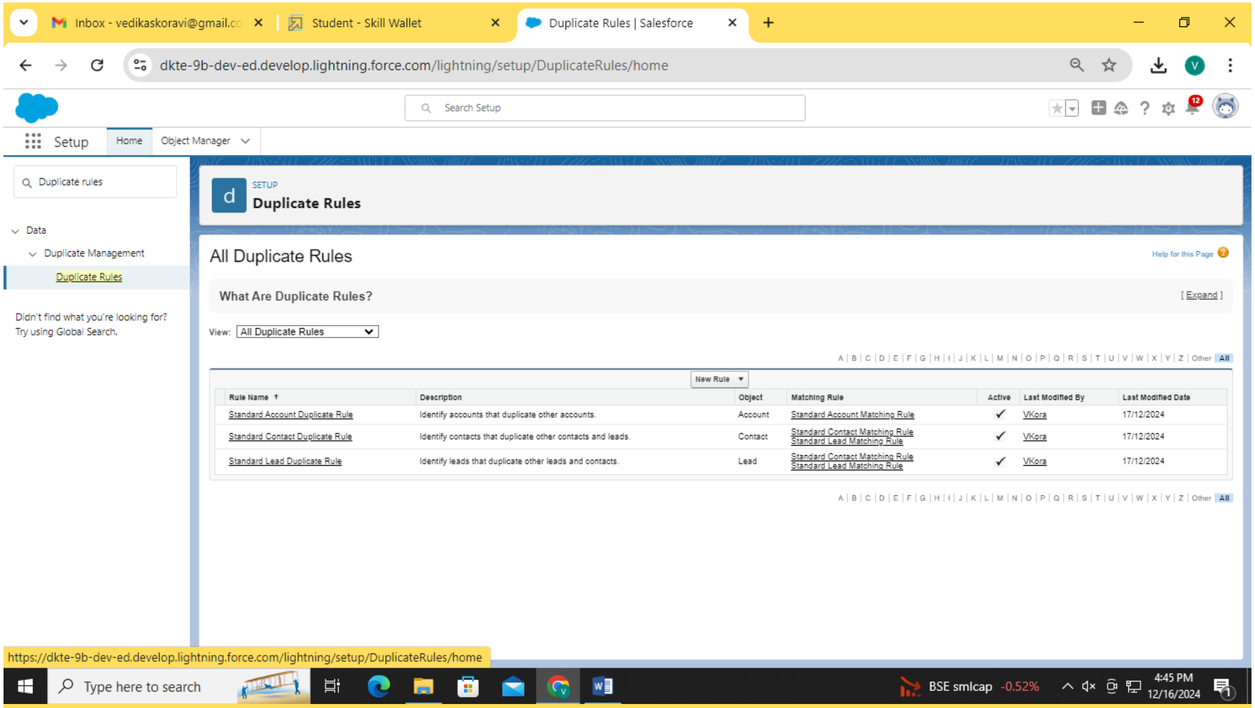

Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Matching Rules | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/MatchingRules/page?address=%2F0JD%2Fe%3FretURL%3D%252F0JD
Search Setup
Setup
Home
Object Manager
matching Rule
Data
Duplicate Management
Matching Rules
Didn't find what you're looking for? Try using Global Search.
SETUP
Matching Rules
Previous
Save
Cancel
Rule Details
= Required Information
Object
Customer Details
Rule Name
Matching customer details
Unique Name
Matching_customer_details
Description
Matching Criteria
Tell the rule which fields to compare and how.
Field
Matching Method
Match Blank Fields
Gmail
Exact
AND
Phone number
Exact
AND
--None--
Exact
AND
--None--
Exact
AND
--None--
Exact
Add Filter Logic...
Previous
Save
Cancel
Type here to search
Record low
4:42 PM
12/16/2024

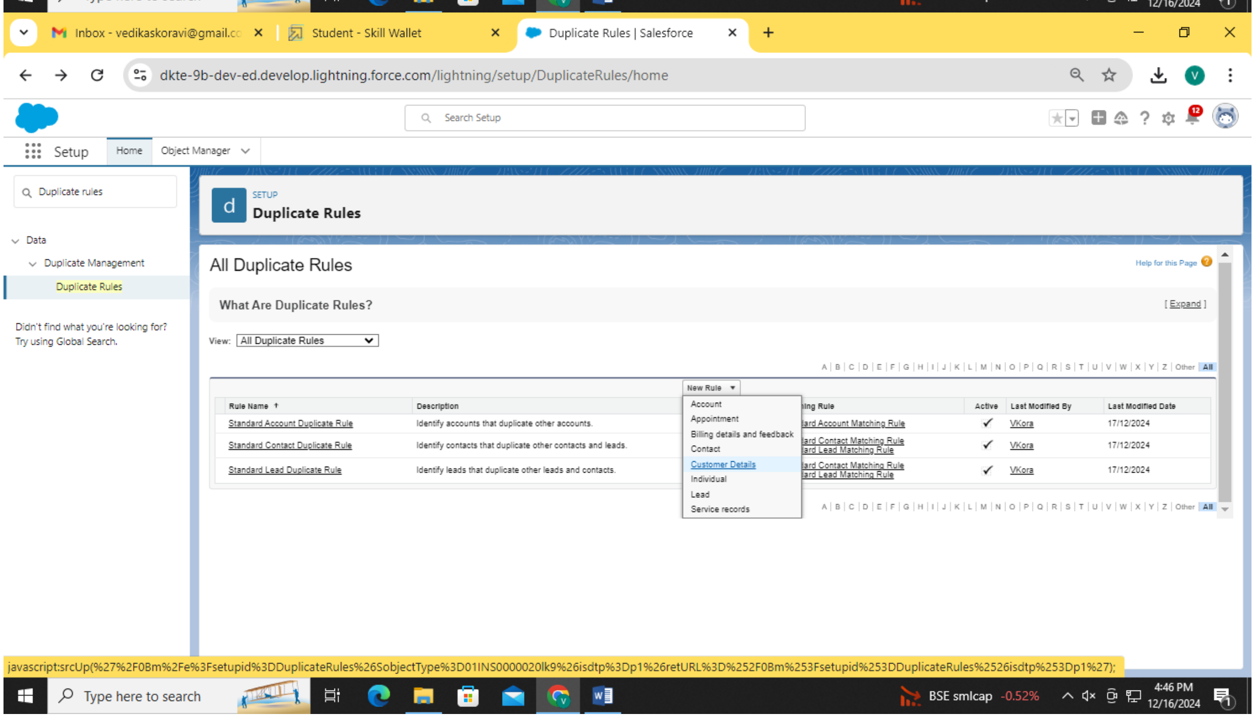

Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Matching Rules | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/MatchingRules/page?address=%2F0JDNS000003HoEn
Search Setup
Setup
Home
Object Manager
matching Rule
Data
Duplicate Management
Matching Rules
Didn't find what you're looking for? Try using Global Search.
SETUP
Matching Rules
Matching Rule
Matching customer details
Help for this Page
Matching Rule Detail
Edit
Delete
Clone
Activate
Object
Customer Details
Rule Name
Matching customer details
Unique Name
Matching_customer_details
Description
Matching Criteria
(Customer Details: Gmail EXACT MatchBlank = FALSE) AND (Customer Details: Phone_number EXACT MatchBlank = FALSE)
Status
Inactive
Created By
Vedika Koravi, 17/12/2024, 4:53 pm
Modified By
Vedika Koravi, 17/12/2024, 4:53 pm
Type here to search
Record low
4:42 PM
12/16/2024

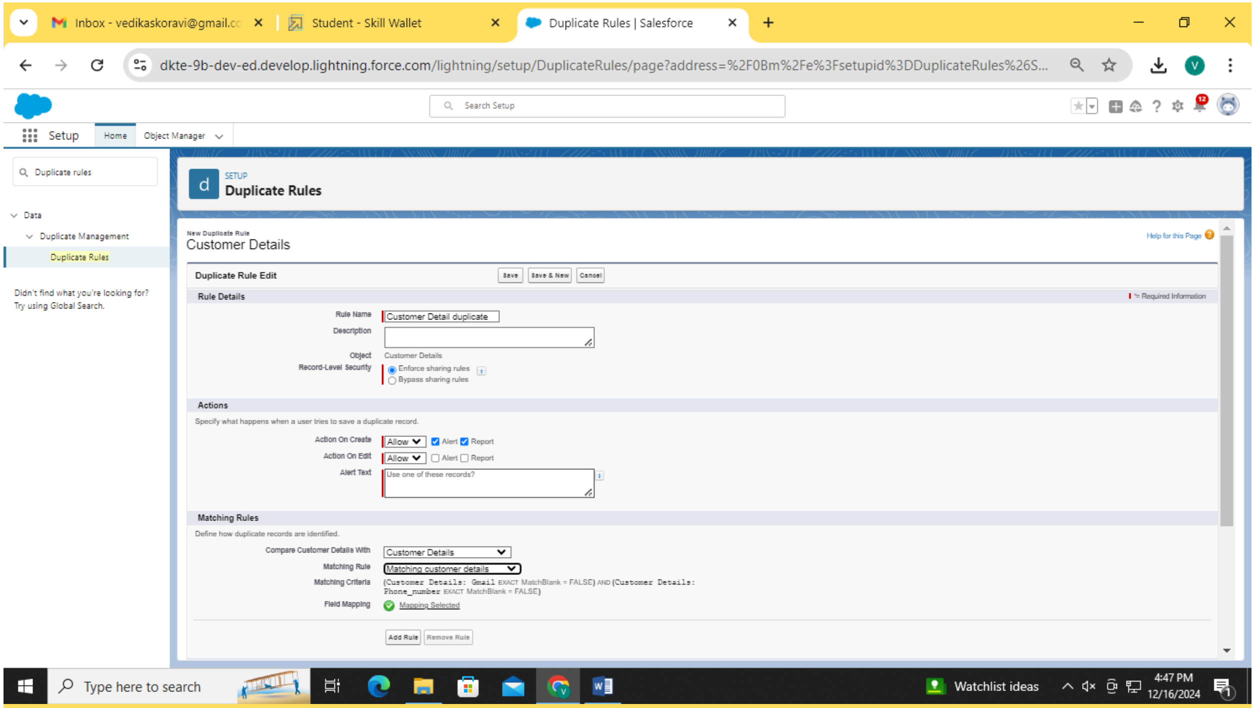

Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Matching Rules | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/MatchingRules/page?address=%2F0JDNS000003HoEn%3Fet%3DTOGGLE%26Id%3...
Search Setup
Setup
Home
Object Manager
matching Rule
Data
Duplicate Management
Matching Rules
Didn't find what you're looking for? Try using Global Search.
SETUP
Matching Rules
Matching Rule
Matching customer details
Help for this Page
Matching Rule Detail
Edit
Delete
Clone
Activate
Object
Customer Details
Rule Name
Matching customer details
Unique Name
Matching_customer_details
Description
Matching Criteria
Status
Inactive
Created 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.
OK
javascript:void(0)
Type here to search
Record low
4:42 PM
12/16/2024

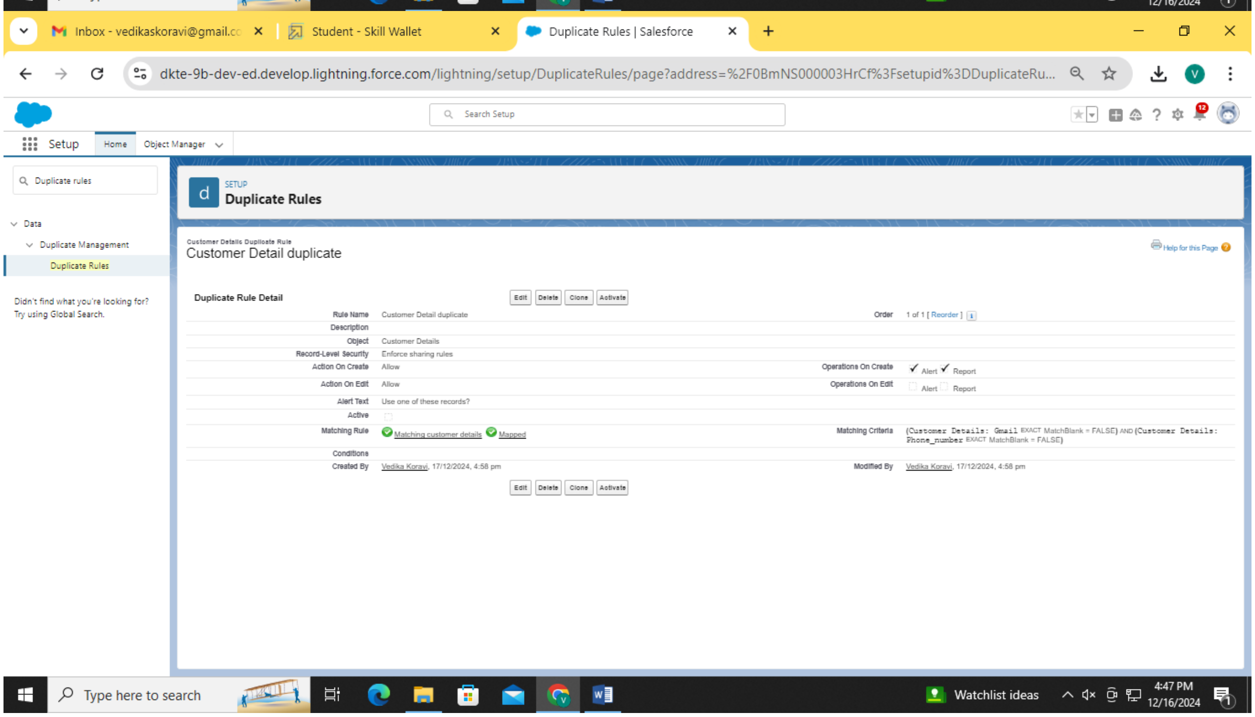

Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Matching Rules | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/MatchingRules/page?address=%2F0JDNS000003HoEn
Search Setup
Setup
Home
Object Manager
matching Rule
Data
Duplicate Management
Matching Rules
Didn't find what you're looking for? Try using Global Search.
SETUP
Matching Rules
Matching Rule
Matching customer details
Help for this Page
Matching Rule Detail
Delete
Clone
Deactivate
Object
Customer Details
Rule Name
Matching customer details
Unique Name
Matching_customer_details
Description
Matching Criteria
(Customer Details: Gmail EXACT MatchBlank = FALSE) AND (Customer Details: Phone_number EXACT MatchBlank = FALSE)
Status
Active
Created By
Vedika Koravi, 17/12/2024, 4:53 pm
Modified By
Vedika Koravi, 17/12/2024, 4:53 pm
Type here to search
BSE midcap -0.20%
4:42 PM
12/16/2024

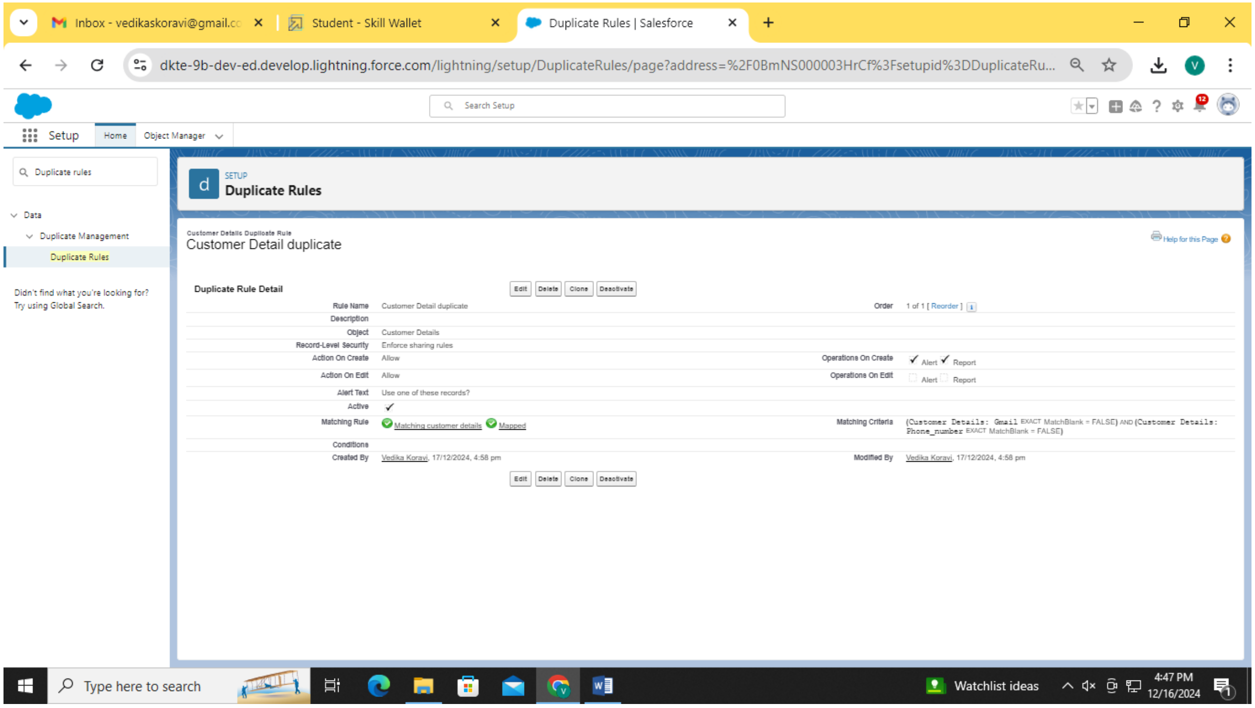
To create a Duplicate rule to an Customer details Object





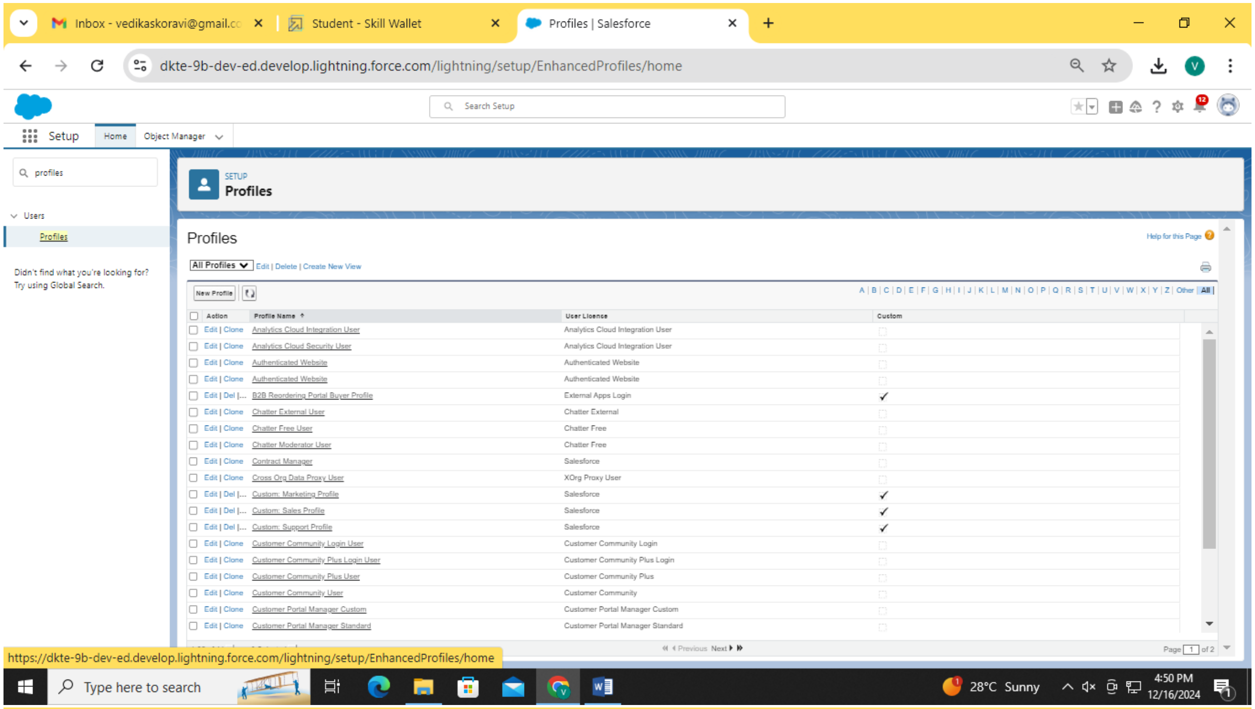

Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Duplicate Rules | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/DuplicateRules/page?address=%2F0Bm%2Fe%3Fsetupid%3DDuplicateRules%26S...
Search Setup
Setup
Home
Object Manager
Duplicate rules
Data
Duplicate Management
Duplicate Rules
Didn't find what you're looking for? Try using Global Search.
SETUP
Duplicate Rules
New Duplicate Rule
Customer Details
Help for this Page
Duplicate Rule Edit
Save
Save & New
Cancel
Rule Details
= Required Information
Rule Name
Customer Detail duplicate
Description
Object
Customer Details
Record-Level Security
Enforce sharing rules
Bypass sharing rules
Actions
Specify what happens when a user tries to save a duplicate record.
Action On Create
Allow
Alert
Report
Action On Edit
Allow
Alert
Report
Alert Text
Use one of these records?
Matching Rules
Define how duplicate records are identified.
Compare Customer Details With
Customer Details
Matching Rule
Matching customer details
Matching Criteria
(Customer Details: Gmail EXACT MatchBlank = FALSE) AND (Customer Details: Phone_number EXACT MatchBlank = FALSE)
Field Mapping
Mapping Selected
Add Rule
Remove Rule
Type here to search
Watchlist ideas
4:47 PM
12/16/2024

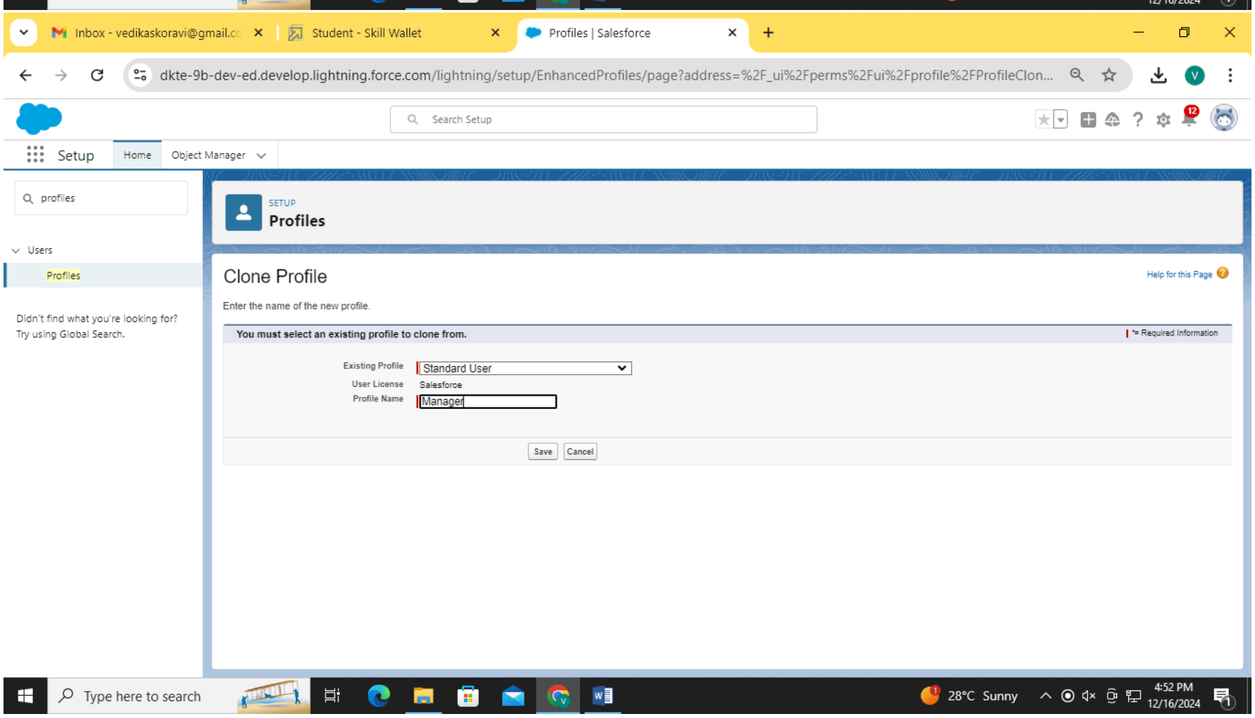

Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Duplicate Rules | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/DuplicateRules/page?address=%2F0BmNS000003HrCf%3Fsetupid%3DDuplicateRu...
Search Setup
Setup
Home
Object Manager
Duplicate rules
Data
Duplicate Management
Duplicate Rules
Didn't find what you're looking for? Try using Global Search.
SETUP
Duplicate Rules
Customer Details Duplicate Rule
Customer Detail duplicate
Help for this Page
Duplicate Rule Detail
Edit
Delete
Clone
Activate
Rule Name
Customer Detail duplicate
Order
1 of 1 [Reorder]
Description
Object
Customer Details
Record-Level Security
Enforce sharing rules
Action On Create
Allow
Operations On Create
Alert
Report
Action On Edit
Allow
Operations On Edit
Alert
Report
Alert Text
Use one of these records?
Active
Matching Rule
Matching customer details
Mapped
Matching Criteria
(Customer Details: Gmail EXACT MatchBlank = FALSE) AND (Customer Details: Phone_number EXACT MatchBlank = FALSE)
Conditions
Created By
Vedika Koravi, 17/12/2024, 4:58 pm
Modified By
Vedika Koravi, 17/12/2024, 4:58 pm
Edit
Delete
Clone
Activate
Type here to search
Watchlist ideas
4:47 PM
12/16/2024

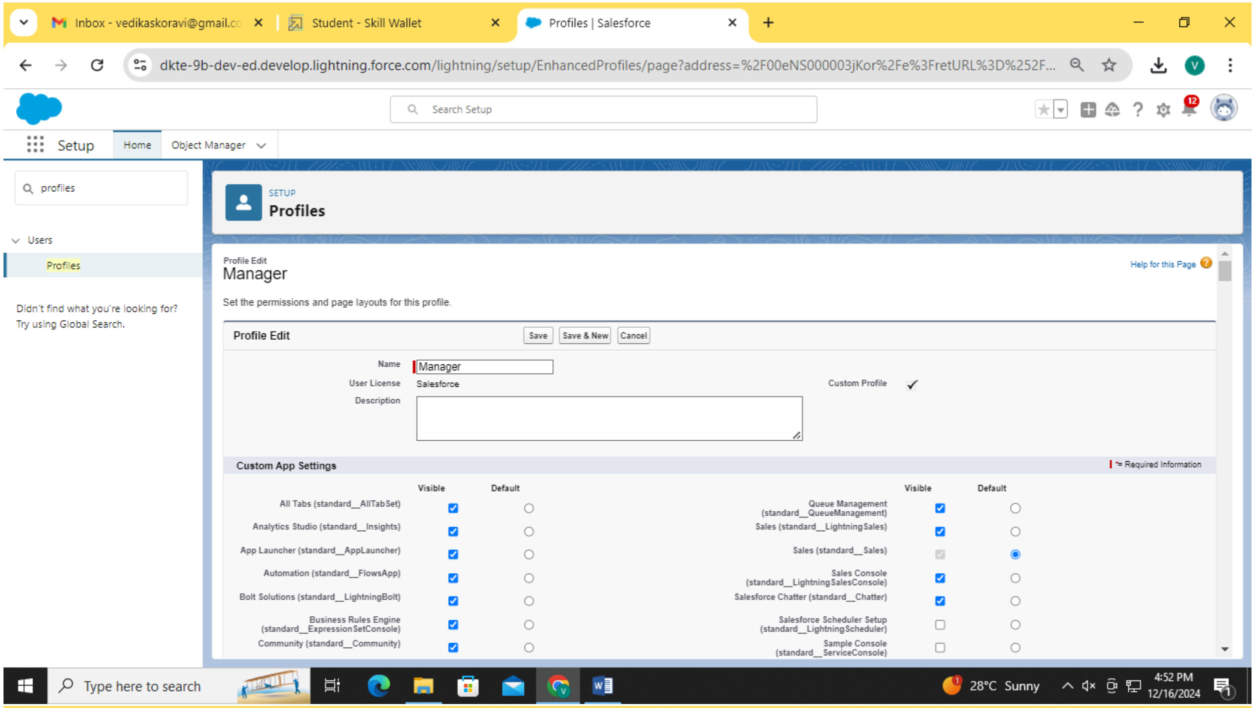

Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Duplicate Rules | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/DuplicateRules/page?address=%2F0BmNS000003HrCf%3Fsetupid%3DDuplicateRu...
Search Setup
Setup
Home
Object Manager
Duplicate rules
Data
Duplicate Management
Duplicate Rules
Didn't find what you're looking for? Try using Global Search.
SETUP
Duplicate Rules
Customer Details Duplicate Rule
Customer Detail duplicate
Help for this Page
Duplicate Rule Detail
Edit
Delete
Clone
Deactivate
Rule Name
Customer Detail duplicate
Order
1 of 1 [Reorder]
Description
Object
Customer Details
Record-Level Security
Enforce sharing rules
Action On Create
Allow
Operations On Create
Alert
Report
Action On Edit
Allow
Operations On Edit
Alert
Report
Alert Text
Use one of these records?
Active
Matching Rule
Matching customer details
Mapped
Matching Criteria
(Customer Details: Gmail EXACT MatchBlank = FALSE) AND (Customer Details: Phone_number EXACT MatchBlank = FALSE)
Conditions
Created By
Vedika Koravi, 17/12/2024, 4:58 pm
Modified By
Vedika Koravi, 17/12/2024, 4:58 pm
Type here to search
Watchlist ideas
4:47 PM
12/16/2024

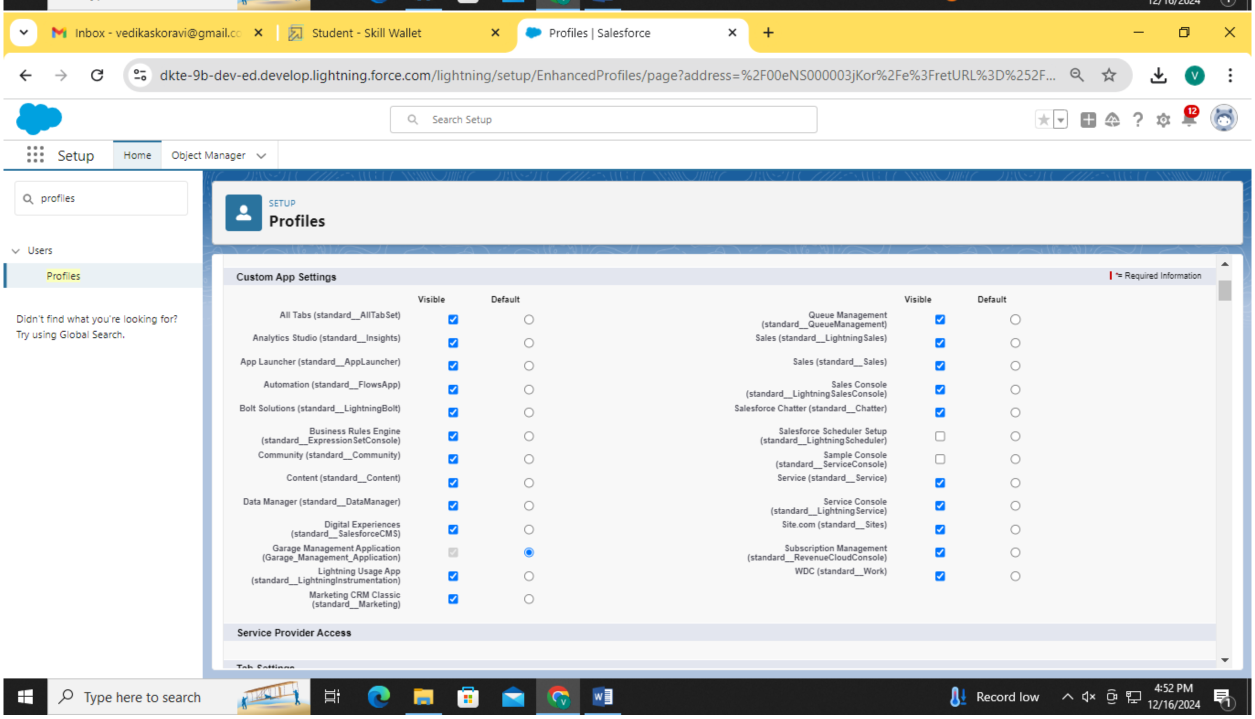
Profiles

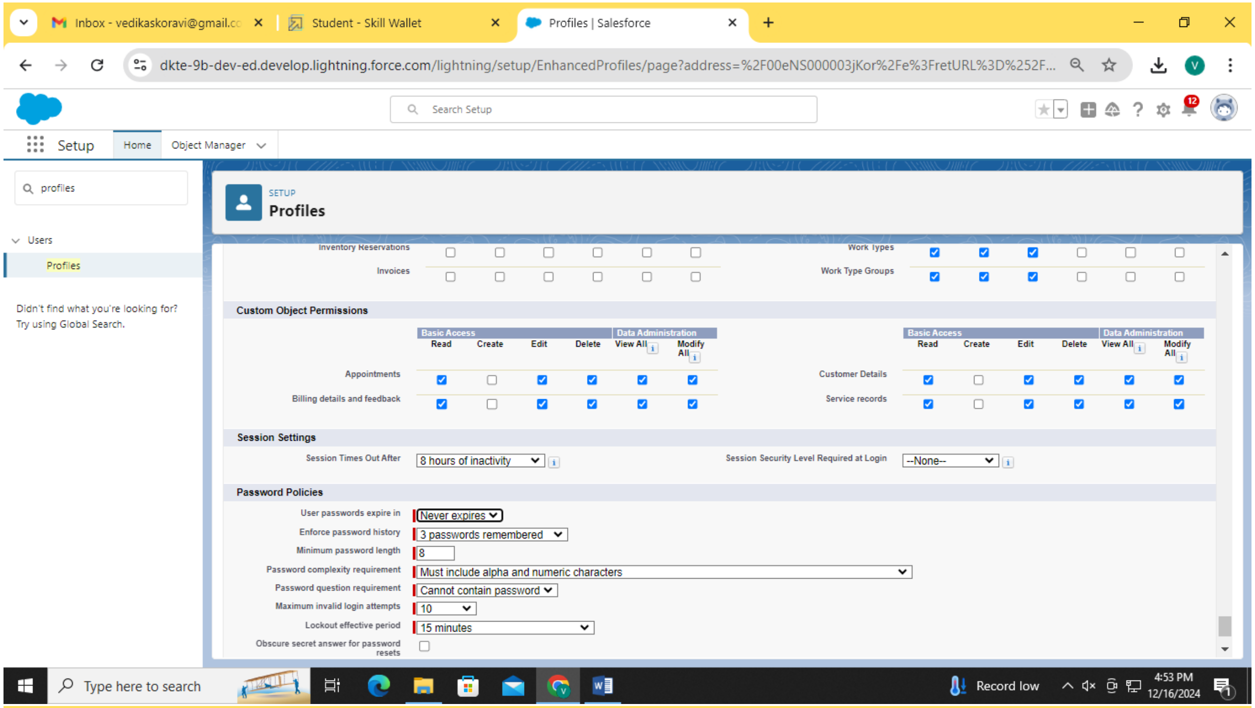
Manager Profile

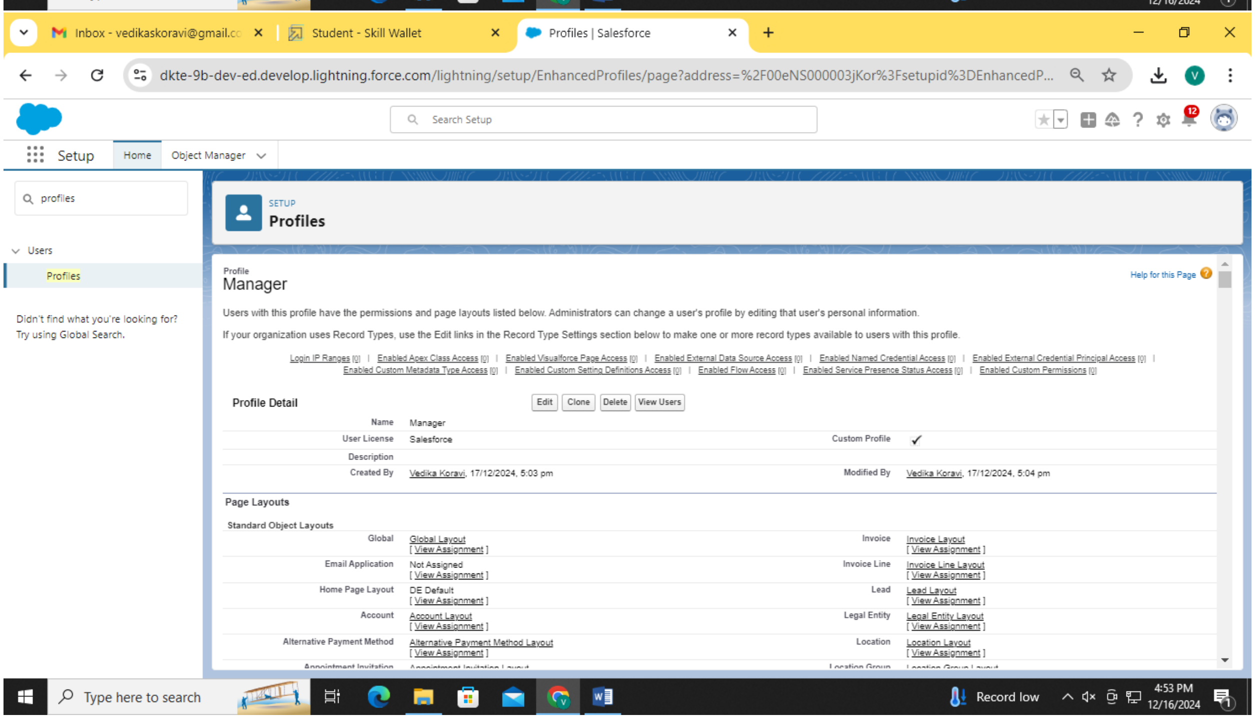




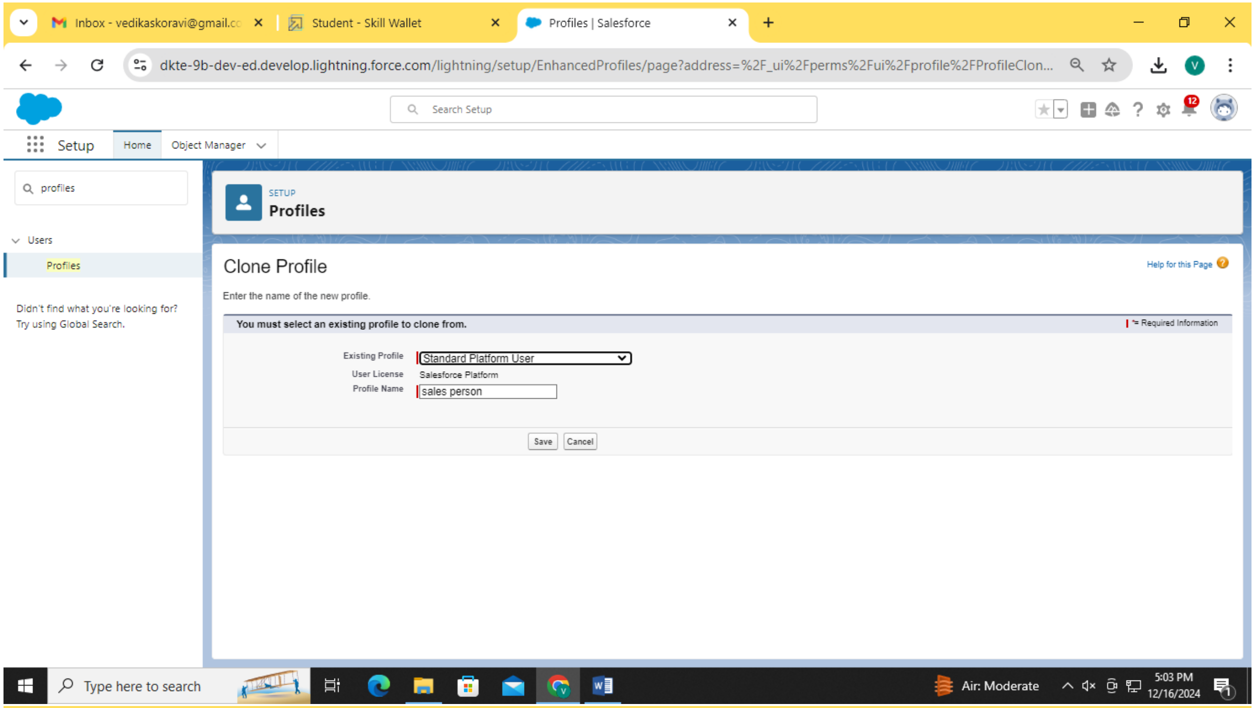

Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Profiles | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00eNS000003jKor%2Fe%3FretURL%3D%252F...
Search Setup
Setup
Home
Object Manager
profiles
Users
Profiles
Didn't find what you're looking for? Try using Global Search.
SETUP
Profiles
Profile Edit
Manager
Help for this Page
Set the permissions and page layouts for this profile.
Profile Edit
Save
Save & New
Cancel
Name
Manager
User License
Salesforce
Custom Profile
Description
Custom App Settings
= Required Information
Visible
Default
All Tabs (standard__AllTabSet)
Analytics Studio (standard__Insights)
App Launcher (standard__AppLauncher)
Automation (standard__FlowsApp)
Bolt Solutions (standard__LightningBolt)
Business Rules Engine (standard__ExpressionSetConsole)
Community (standard__Community)
Queue Management (standard__QueueManagement)
Sales (standard__LightningSales)
Sales (standard__Sales)
Sales Console (standard__LightningSalesConsole)
Salesforce Chatter (standard__Chatter)
Salesforce Scheduler Setup (standard__LightningScheduler)
Sample Console (standard__ServiceConsole)
Type here to search
28°C Sunny
4:52 PM
12/16/2024

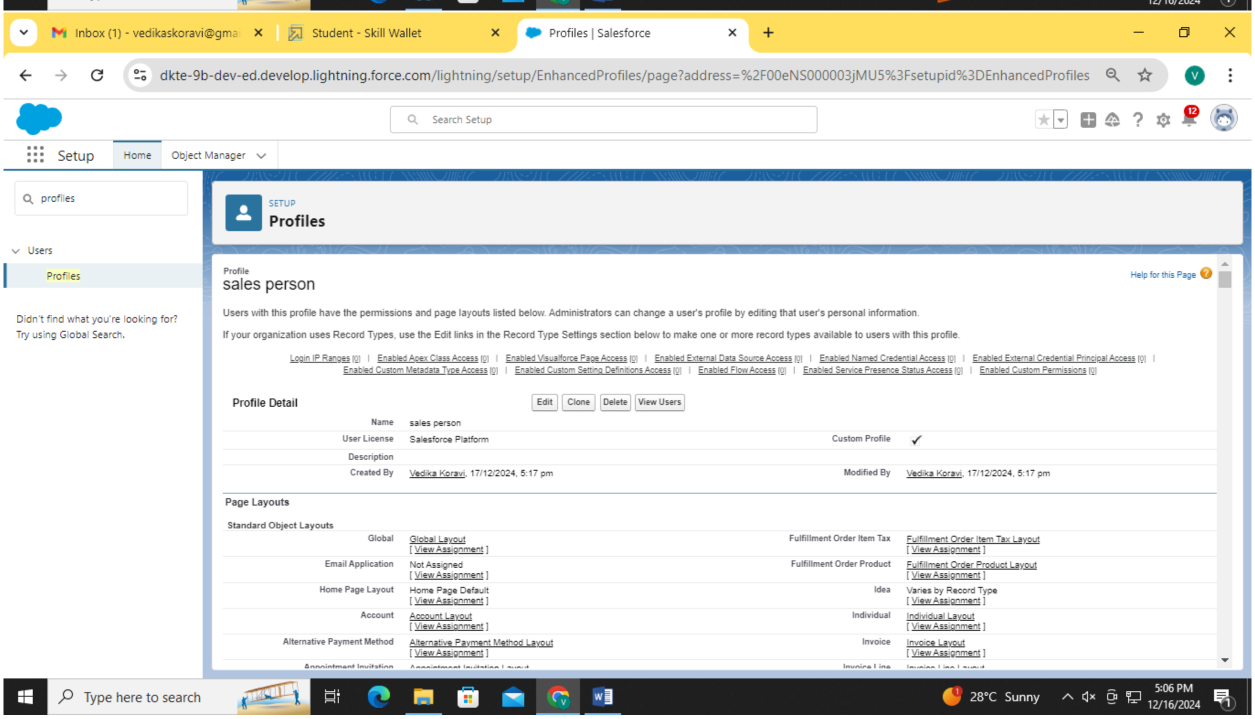

Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Profiles | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00eNS000003jKor%2Fe%3FretURL%3D%252F...
Search Setup
Setup
Home
Object Manager
profiles
Users
Profiles
Didn't find what you're looking for? Try using Global Search.
SETUP
Profiles
Custom App Settings
= Required Information
Visible
Default
All Tabs (standard__AllTabSet)
Analytics Studio (standard__Insights)
App Launcher (standard__AppLauncher)
Automation (standard__FlowsApp)
Bolt Solutions (standard__LightningBolt)
Business Rules Engine (standard__ExpressionSetConsole)
Community (standard__Community)
Content (standard__Content)
Data Manager (standard__DataManager)
Digital Experiences (standard__SalesforceCMS)
Garage Management Application (Garage_Management_Application)
Lightning Usage App (standard__LightningInstrumentation)
Marketing CRM Classic (standard__Marketing)
Queue Management (standard__QueueManagement)
Sales (standard__LightningSales)
Sales (standard__Sales)
Sales Console (standard__LightningSalesConsole)
Salesforce Chatter (standard__Chatter)
Salesforce Scheduler Setup (standard__LightningScheduler)
Sample Console (standard__ServiceConsole)
Service (standard__Service)
Service Console (standard__LightningService)
Site.com (standard__Sites)
Subscription Management (standard__RevenueCloudConsole)
WDC (standard__Work)
Service Provider Access
Type here to search
Record low
4:52 PM
12/16/2024

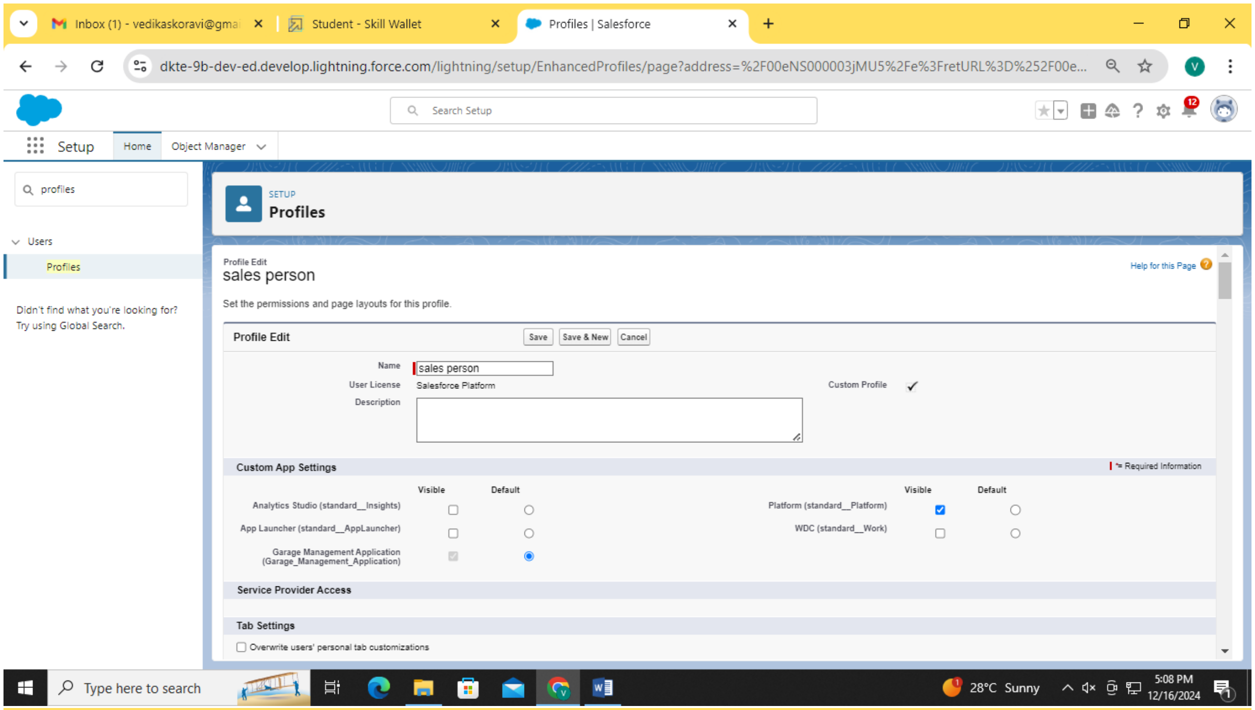

Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Profiles | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00eNS000003jKor%2Fe%3FretURL%3D%252F...
Search Setup
Setup
Home
Object Manager
profiles
Users
Profiles
Didn't find what you're looking for? Try using Global Search.
SETUP
Profiles
Inventory Reservations
Invoices
Work Types
Work Type Groups
Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Appointments
Billing details and feedback
Customer Details
Service records
Session Settings
Session Times Out After
8 hours of inactivity
Session Security Level Required at Login
--None--
Password Policies
User passwords expire in
Never expires
Enforce password history
3 passwords remembered
Minimum password length
8
Password complexity requirement
Must include alpha and numeric characters
Password question requirement
Cannot contain password
Maximum invalid login attempts
10
Lockout effective period
15 minutes
Obscure secret answer for password resets
Type here to search
Record low
4:53 PM
12/16/2024


Inbox - vedikaskoravi@gmail.co
Student - Skill Wallet
Profiles | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00eNS000003jKor%3Fsetupid%3DEnhancedP...
Search Setup
Setup
Home
Object Manager
profiles
Users
Profiles
Didn't find what you're looking for? Try using Global Search.
SETUP
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.
Login IP Ranges | Enabled Apex Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled External Credential Principal Access | Enabled Custom Metadata Type Access | Enabled Custom Setting Definitions Access | Enabled Flow Access | Enabled Service Presence Status Access | Enabled Custom Permissions
Profile Detail
Edit
Clone
Delete
View Users
Name
Manager
User License
Salesforce
Custom Profile
✓
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
Global Layout
[View Assignment]
Invoice
Invoice Layout
[View Assignment]
Email Application
Not Assigned
[View Assignment]
Invoice Line
Invoice Line Layout
[View Assignment]
Home Page Layout
DE Default
[View Assignment]
Lead
Lead Layout
[View Assignment]
Account
Account Layout
[View Assignment]
Legal Entity
Legal Entity Layout
[View Assignment]
Alternative Payment Method
Alternative Payment Method Layout
[View Assignment]
Location
Location Layout
[View Assignment]
Type here to search
Record low
4:53 PM
12/16/2024

sales person Profile







Inbox (1) - vedikaskoravi@gma
Student - Skill Wallet
Profiles | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00eNS000003jMU5%2Fe%3FretURL%3D%252F00e...
Search Setup
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Object Manager
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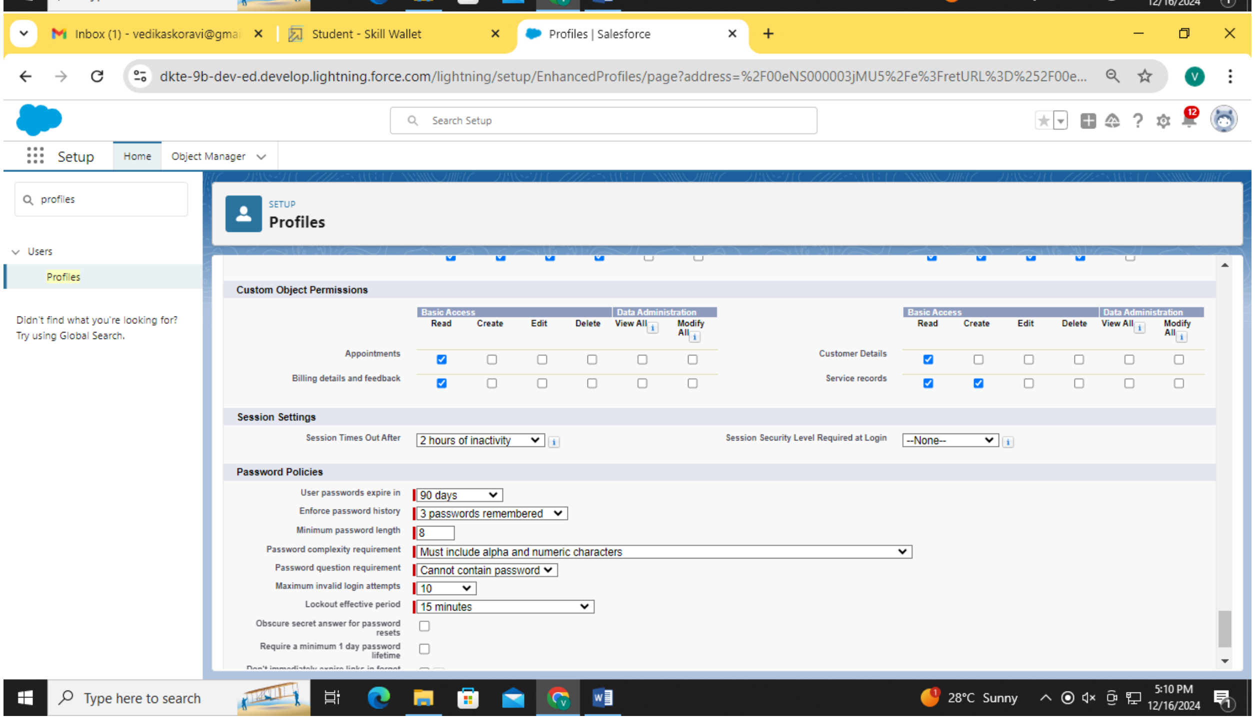
Didn't find what you're looking for? Try using Global Search.
SETUP
Profiles
Profile Edit
sales person
Help for this Page
Set the permissions and page layouts for this profile.
Profile Edit
Save
Save & New
Cancel
Name
sales person
User License
Salesforce Platform
Custom Profile
Description
Custom App Settings
= Required Information
Visible
Default
Analytics Studio (standard__Insights)
App Launcher (standard__AppLauncher)
Garage Management Application (Garage_Management_Application)
Platform (standard__Platform)
WDC (standard__Work)
Service Provider Access
Tab Settings
Overwrite users' personal tab customizations
Type here to search
28°C Sunny
5:08 PM
12/16/2024



Inbox (1) - vedikaskoravi@gma
Student - Skill Wallet
Profiles | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00eNS000003jMU5%2Fe%3FretURL%3D%252F00e...
Search Setup
Setup
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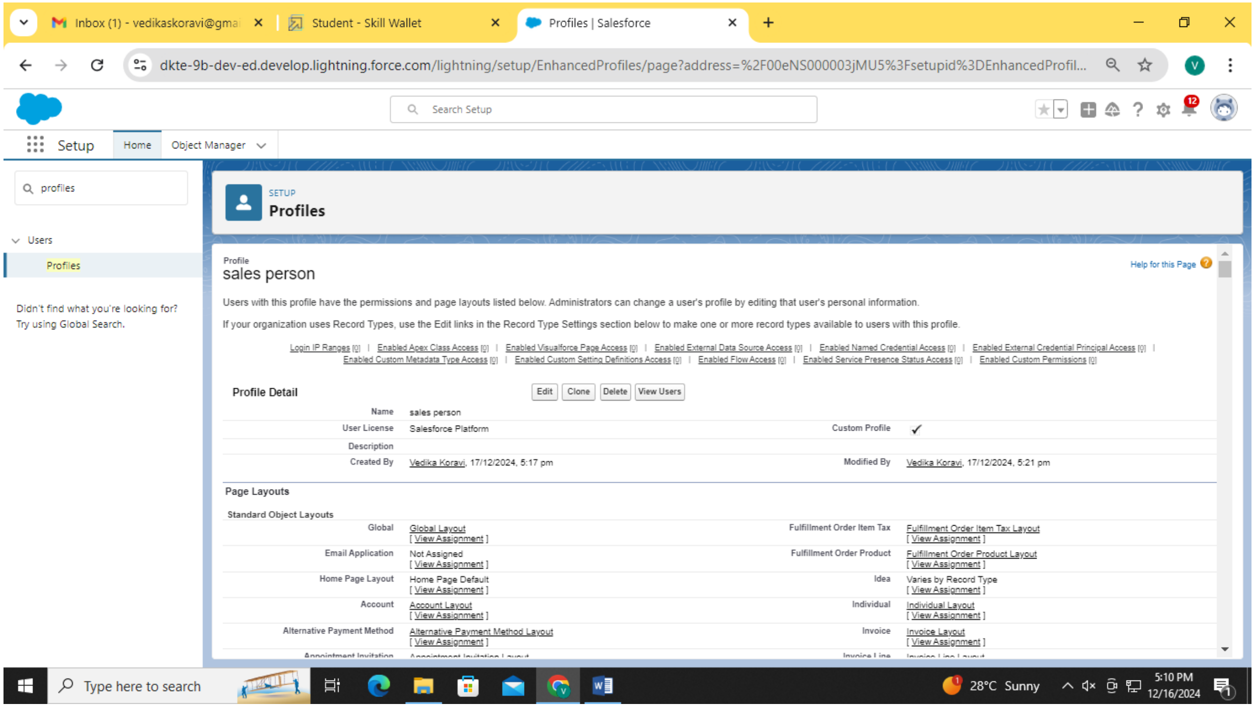
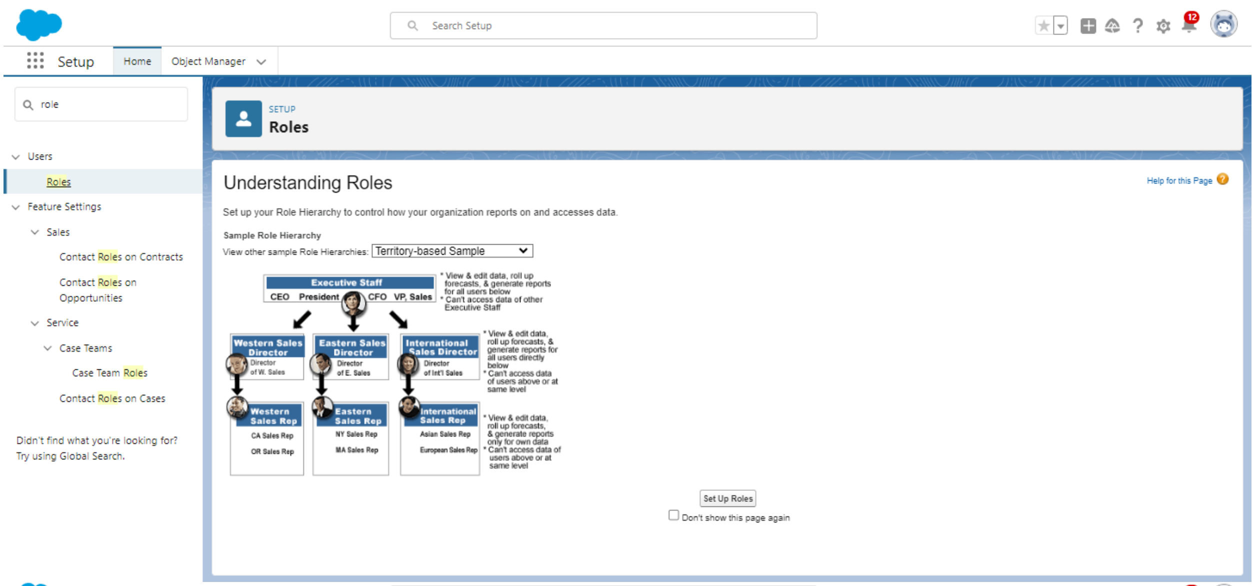
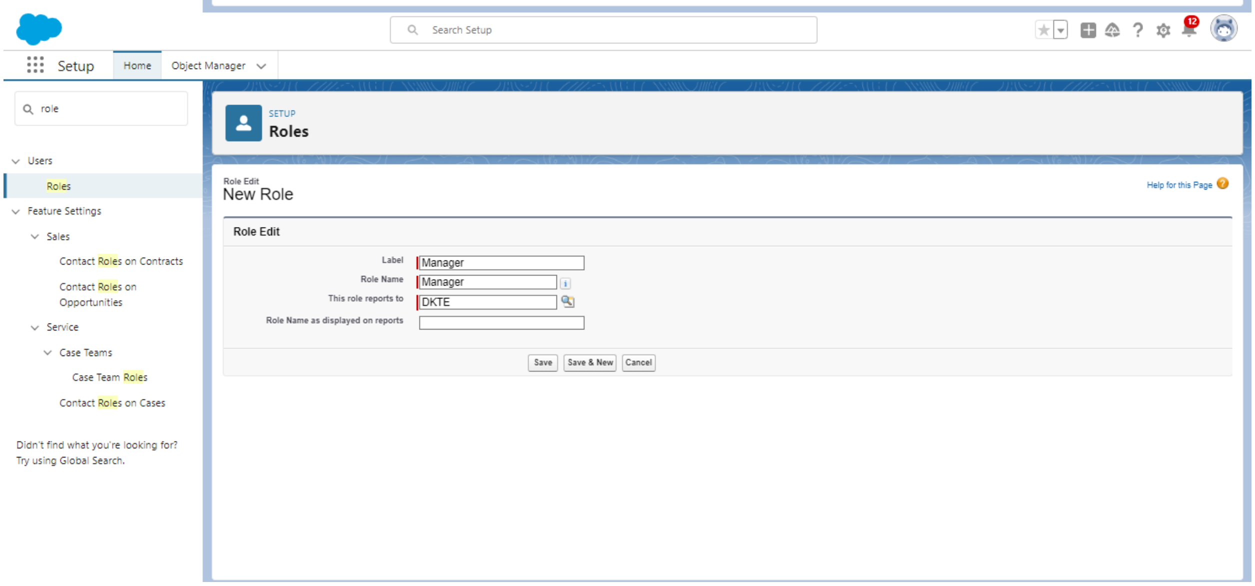
Profiles
Didn't find what you're looking for? Try using Global Search.
SETUP
Profiles
Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Appointments
Billing details and feedback
Customer Details
Service records
Session Settings
Session Times Out After
2 hours of inactivity
Session Security Level Required at Login
--None--
Password Policies
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
Require a minimum 1 day password lifetime
Type here to search
28°C Sunny
5:10 PM
12/16/2024

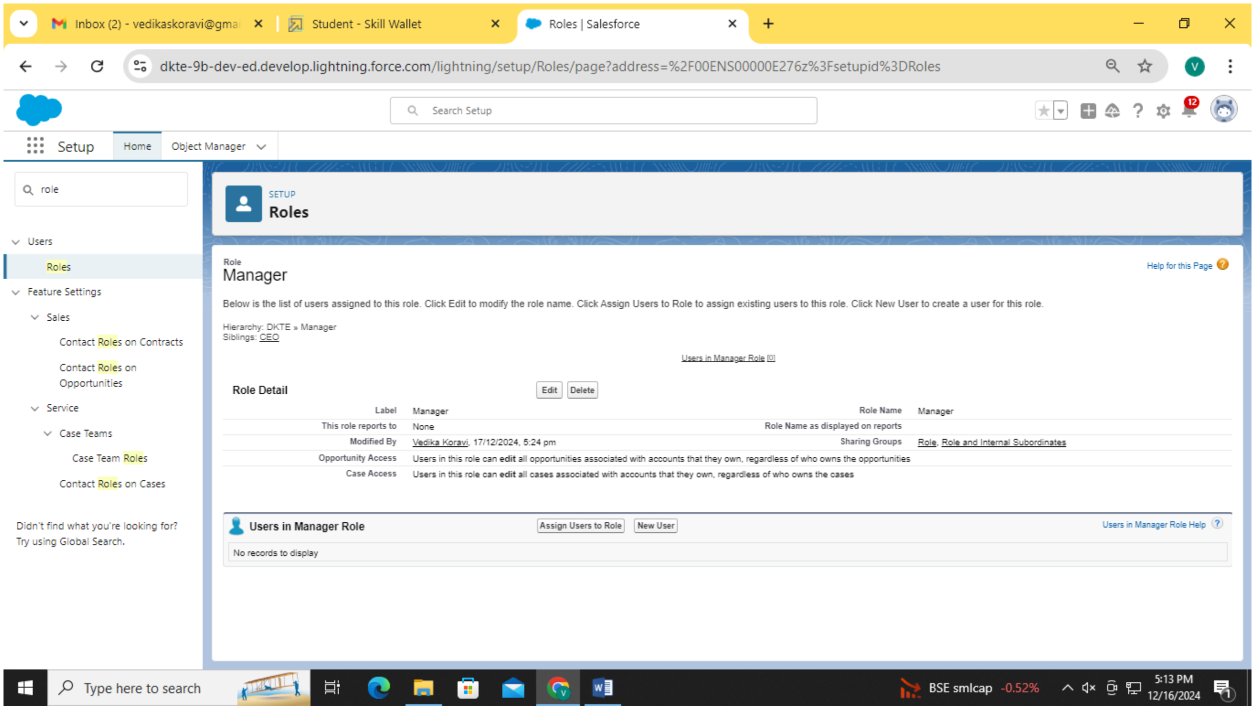

Inbox (1) - vedikaskoravi@gma
Student - Skill Wallet
Profiles | Salesforce
dkte-9b-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00eNS000003jMU5%3Fsetupid%3DEnhancedProfil...
Search Setup
Setup
Home
Object Manager
profiles
Users
Profiles
Didn't find what you're looking for?
Try using Global Search.
SETUP
Profiles
Profile
sales person
Help for this Page
Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.
If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.
Login IP Ranges [0] | Enabled Apex Class Access [0] | Enabled Visualforce Page Access [0] | Enabled External Data Source Access [0] | Enabled Named Credential Access [0] | Enabled External Credential Principal Access [0] |
Enabled Custom Metadata Type Access [0] | Enabled Custom Setting Definitions Access [0] | Enabled Flow Access [0] | Enabled Service Presence Status Access [0] | Enabled Custom Permissions [0]
Profile Detail
Edit
Clone
Delete
View Users
Name sales person
User License Salesforce Platform
Custom Profile ✓
Description
Created By Vedika Koravi, 17/12/2024, 5:17 pm
Modified By Vedika Koravi, 17/12/2024, 5:21 pm
Page Layouts
Standard Object Layouts
Global Global Layout [View Assignment]
Fulfillment Order Item Tax Fulfillment Order Item Tax Layout [View Assignment]
Email Application Not Assigned [View Assignment]
Fulfillment Order Product Fulfillment Order Product Layout [View Assignment]
Home Page Layout Home Page Default [View Assignment]
Idea Varies by Record Type [View Assignment]
Account Account Layout [View Assignment]
Individual Individual Layout [View Assignment]
Alternative Payment Method Alternative Payment Method Layout [View Assignment]
Invoice Invoice Layout [View Assignment]
Type here to search
28°C Sunny
5:10 PM
12/16/2024

Role & Role Hierarchy

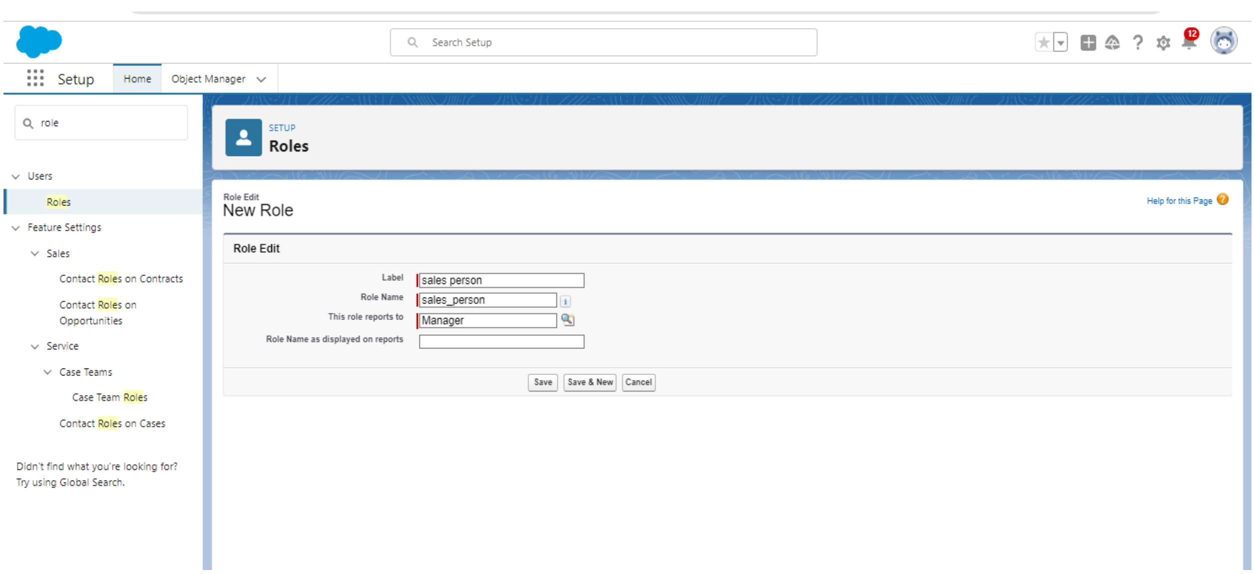
Creating Manager Role

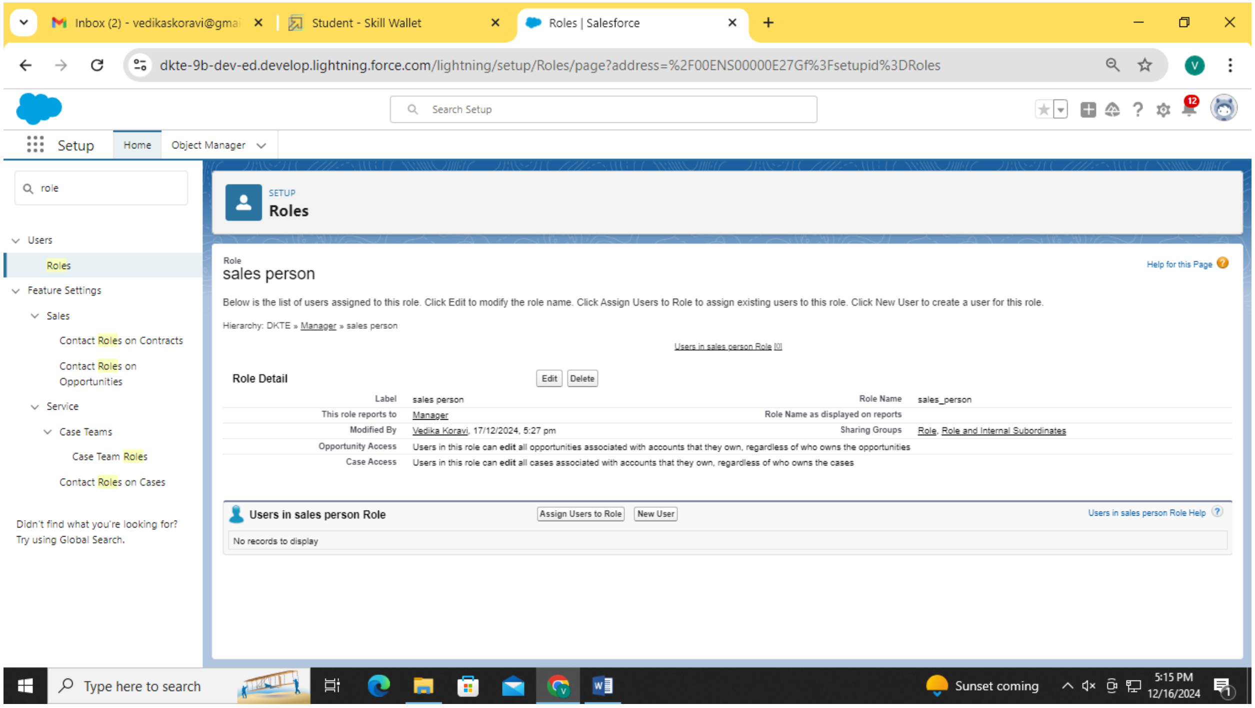






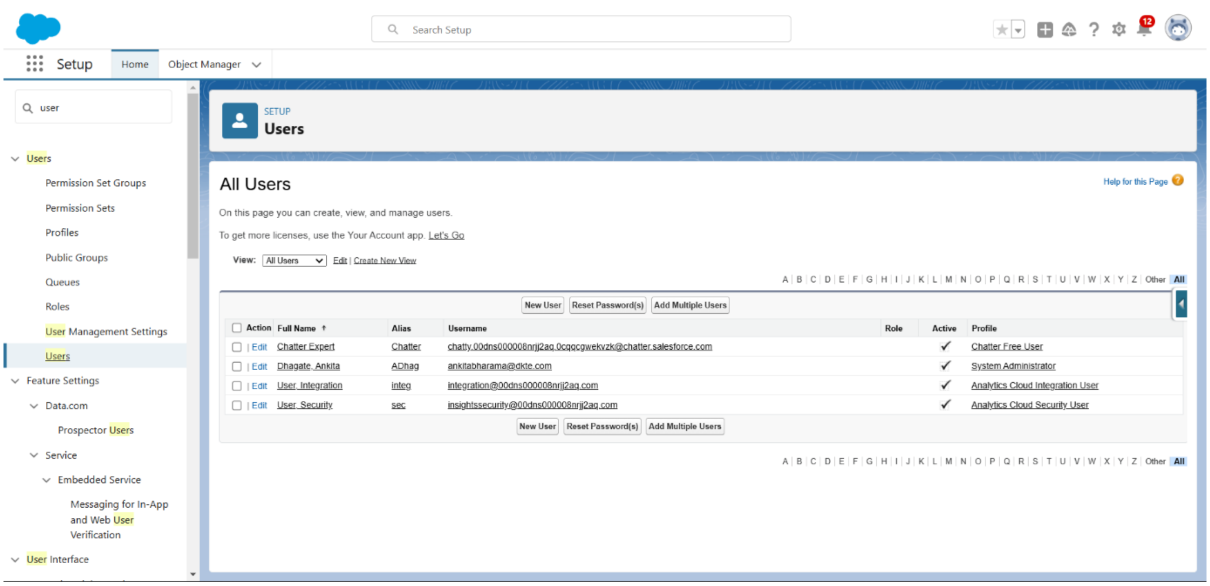
Creating another roles

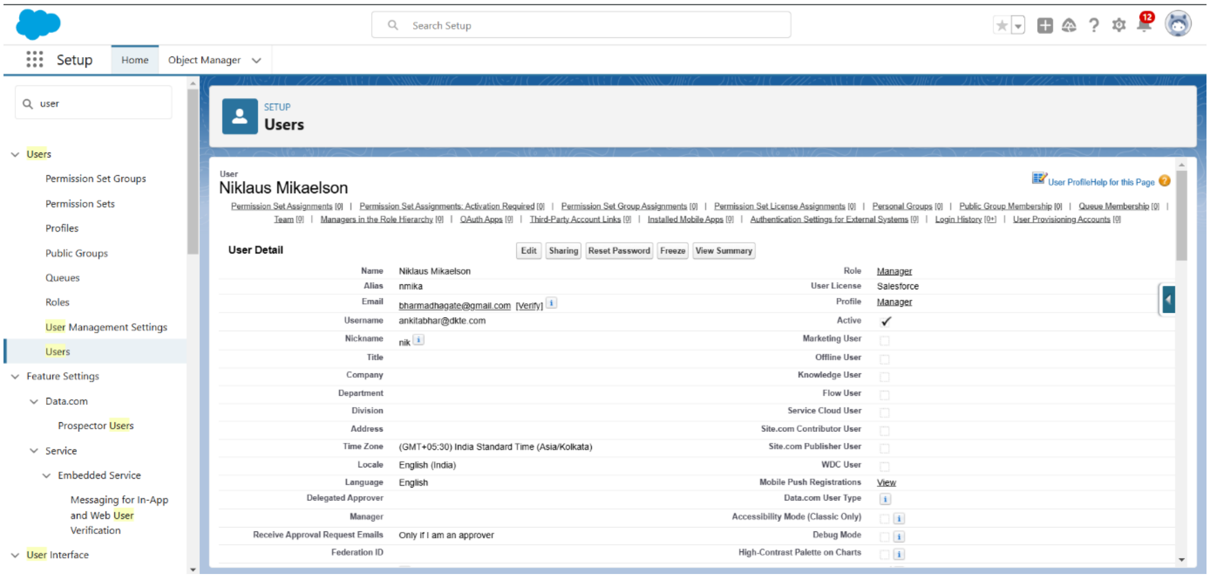




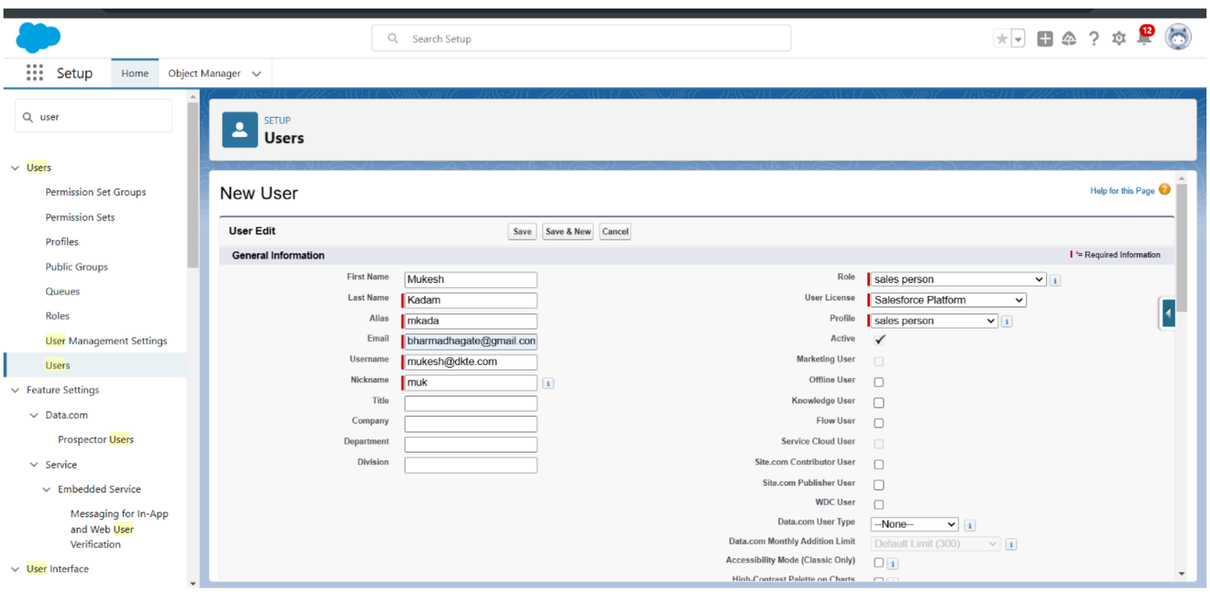
Users

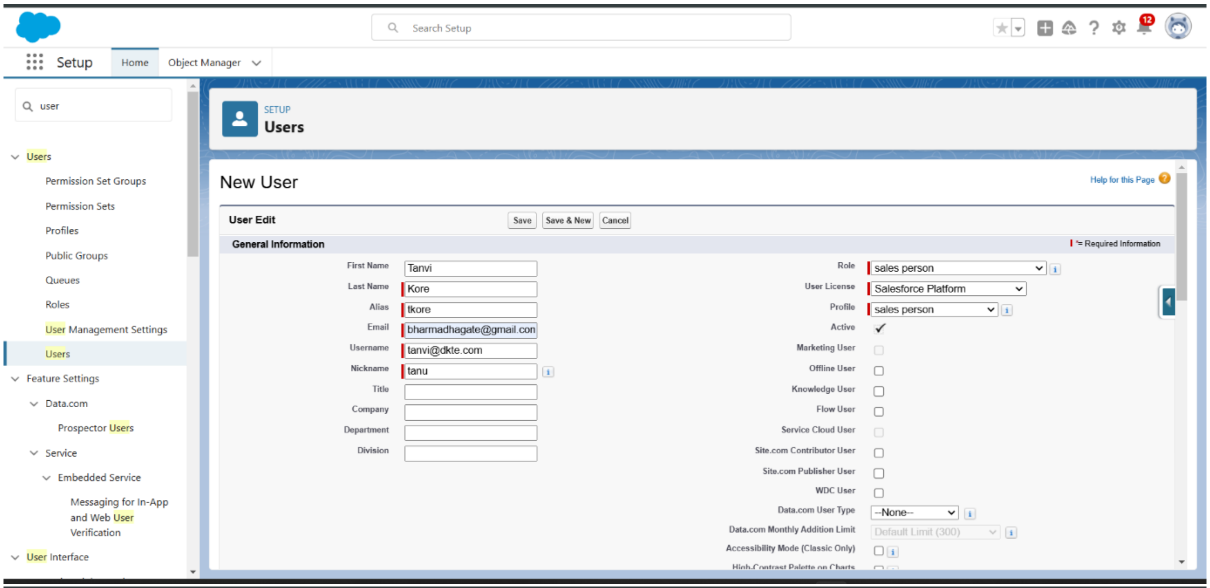
Create User

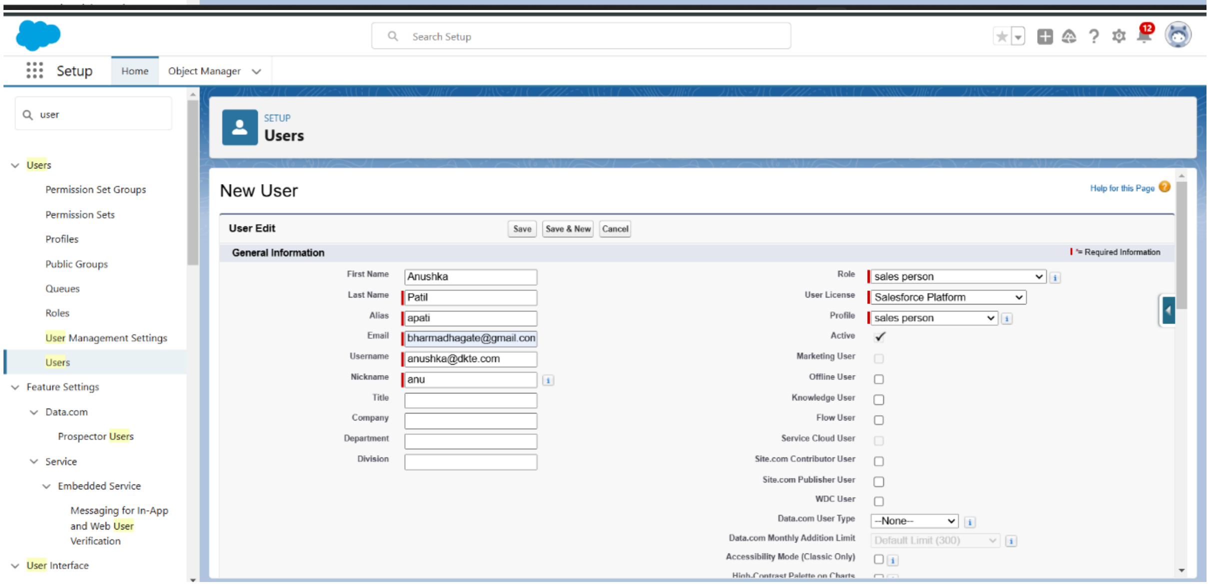




creating another users

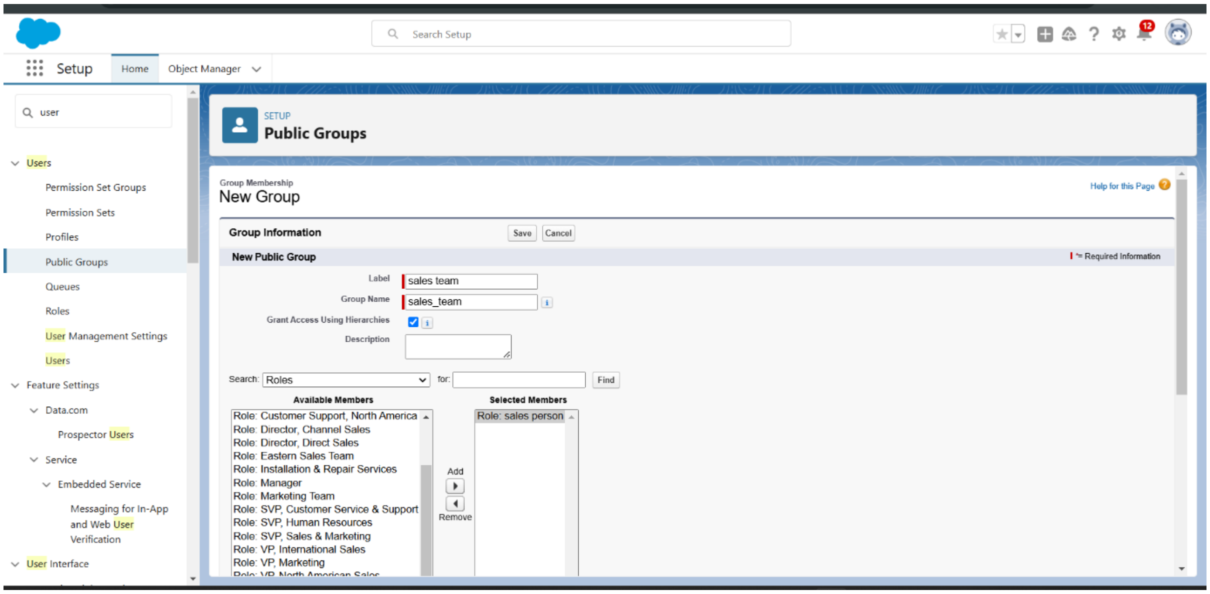



Search Setup
Setup
Home
Object Manager
user
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
SETUP
Users
New User
Help for this Page
User Edit
Save
Save & New
Cancel
General Information
= Required Information
First Name
Tanvi
Last Name
Kore
Alias
tkore
Email
bharmadhagate@gmail.con
Username
tanvi@dkte.com
Nickname
tanu
Title
Company
Department
Division
Role
sales person
User License
Salesforce Platform
Profile
sales person
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Data.com User Type
--None--
Data.com Monthly Addition Limit
Default Limit (300)
Accessibility Mode (Classic Only)


Search Setup
Setup
Home
Object Manager
user
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Service
Embedded Service
Messaging for In-App and Web User Verification
User Interface
SETUP
Users
New User
Help for this Page
User Edit
Save
Save & New
Cancel
General Information
= Required Information
First Name
Anushka
Last Name
Patil
Alias
apati
Email
bharmadhagate@gmail.con
Username
anushka@dkte.com
Nickname
anu
Title
Company
Department
Division
Role
sales person
User License
Salesforce Platform
Profile
sales person
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor User
Site.com Publisher User
WDC User
Data.com User Type
--None--
Data.com Monthly Addition Limit
Default Limit (300)
Accessibility Mode (Classic Only)

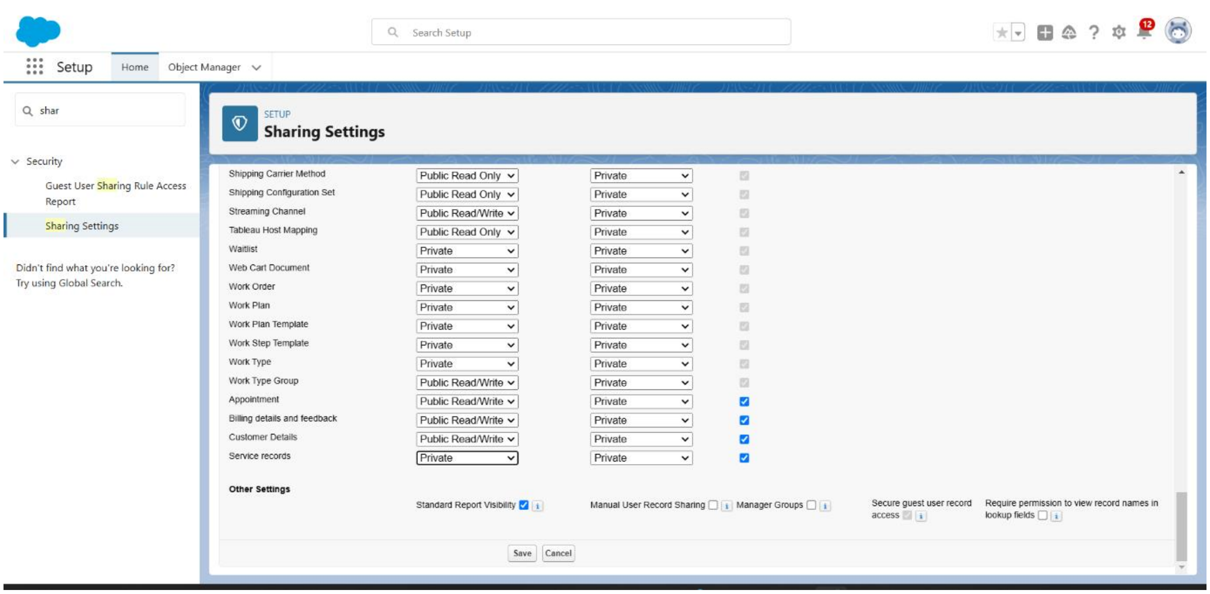
Public groups

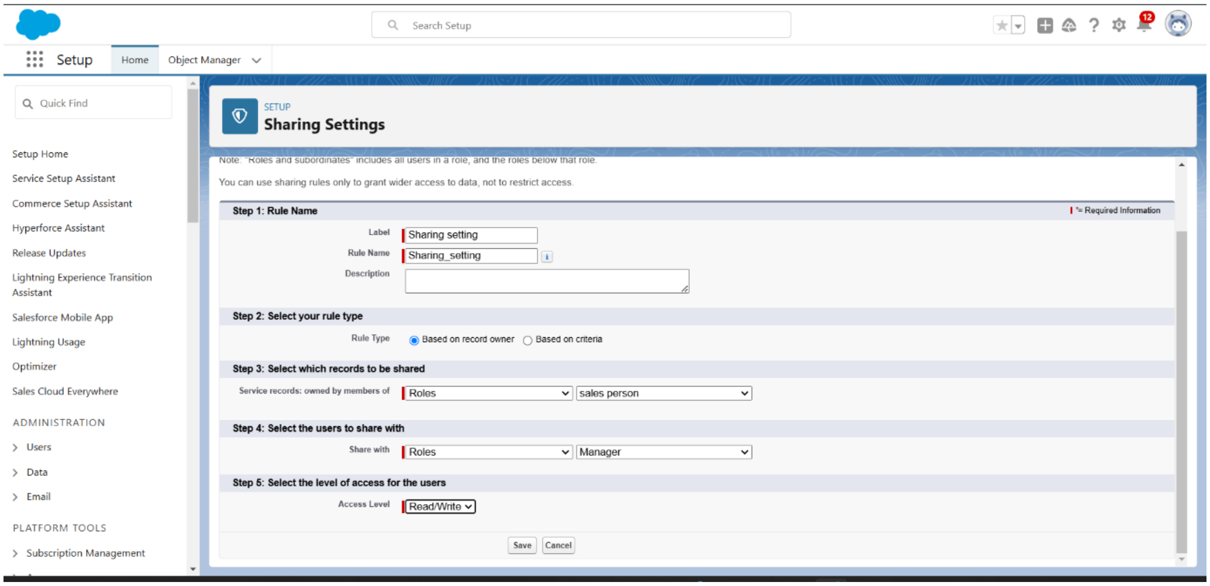
Creating New Public Group



Sharing Setting

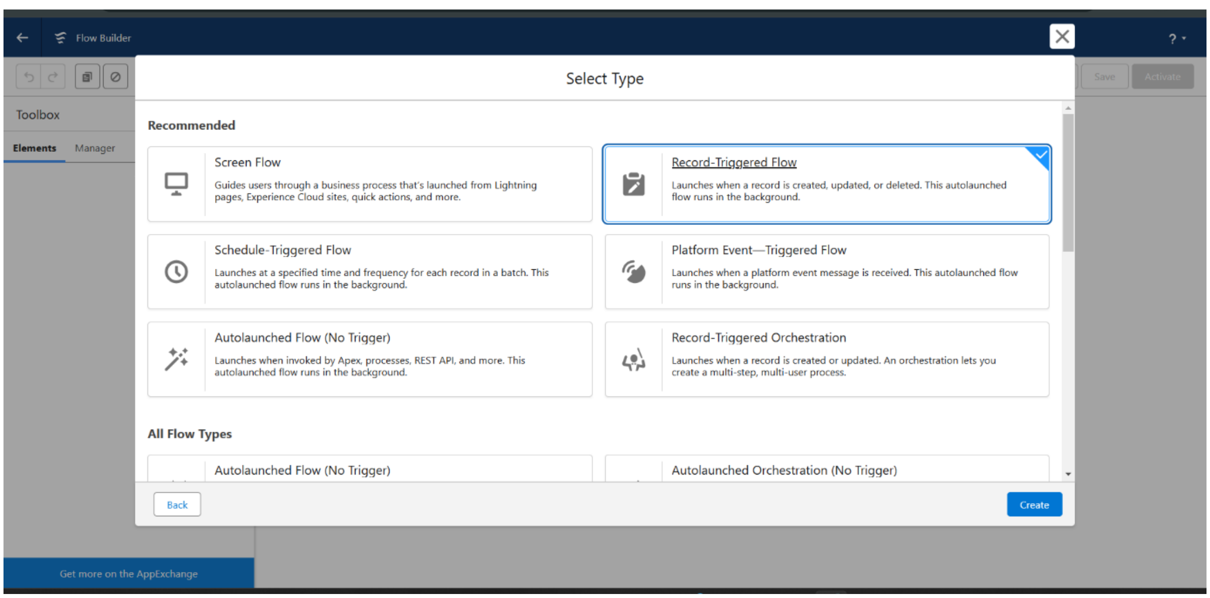
Creating Sharing settings

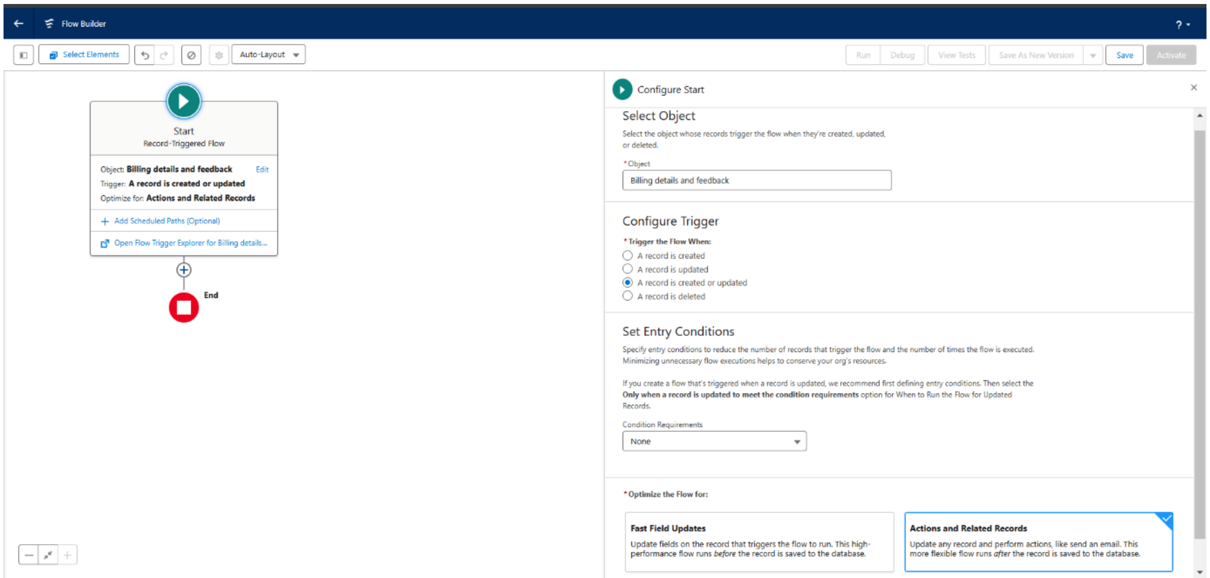


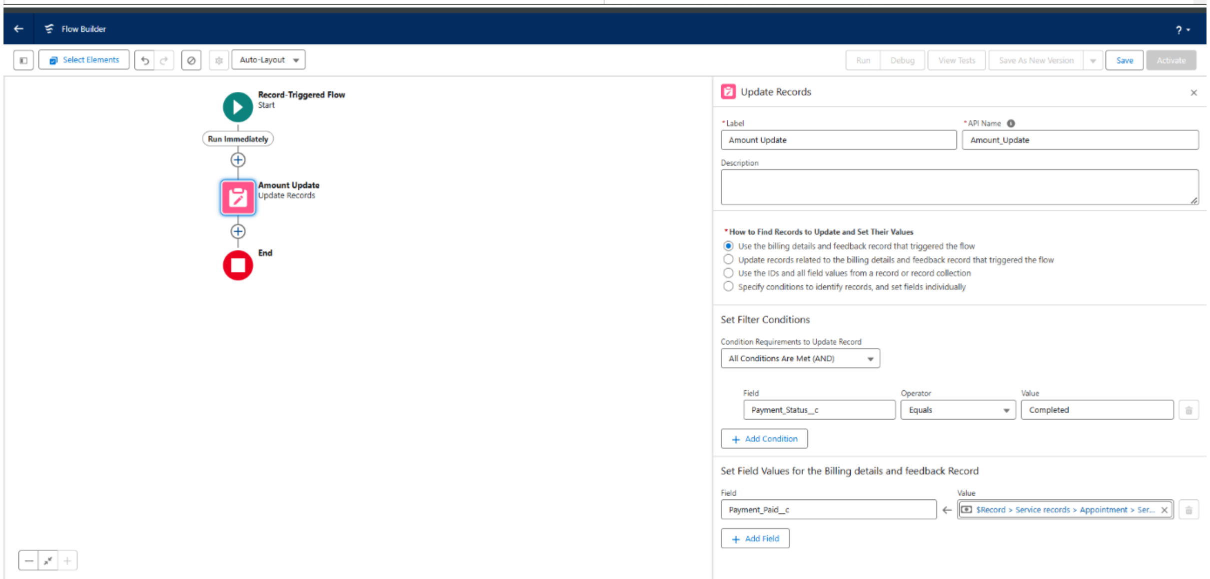


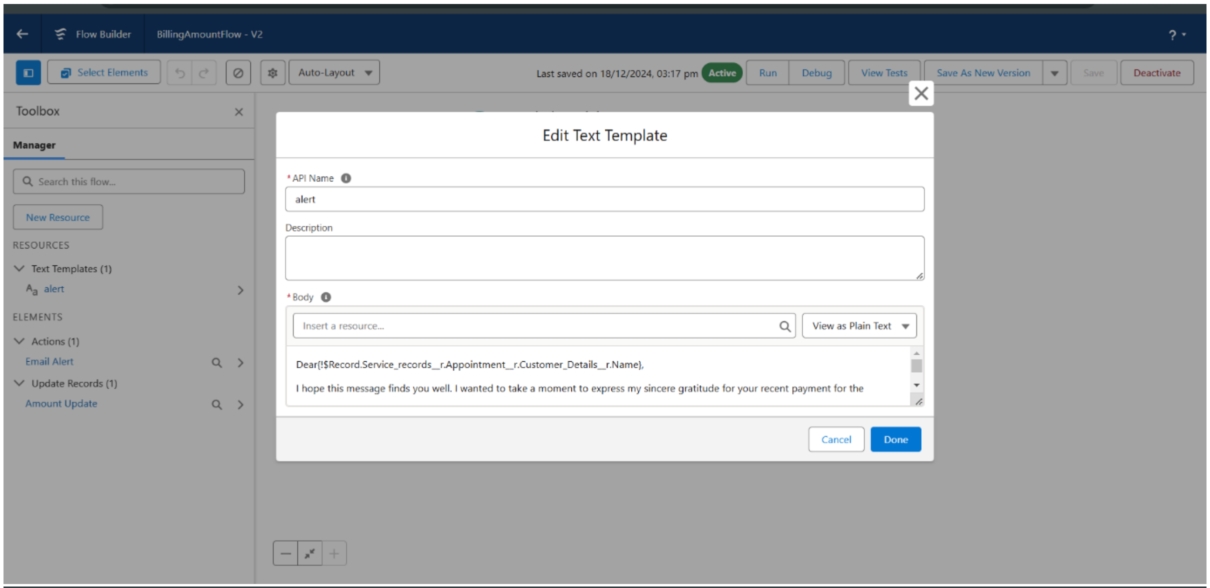
Flows

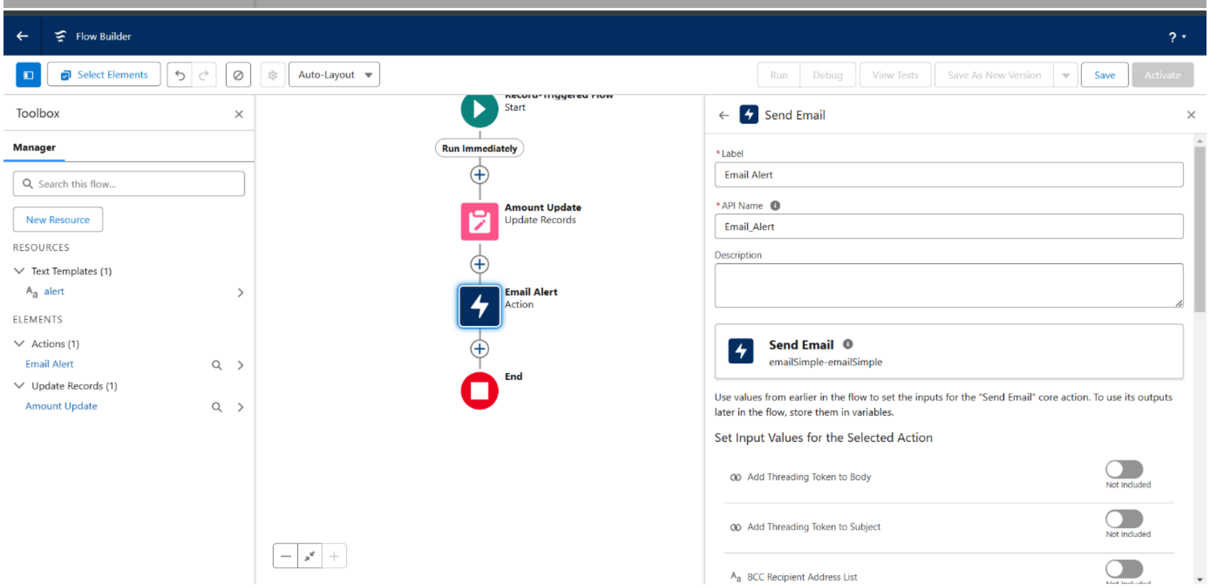
Create a Flow

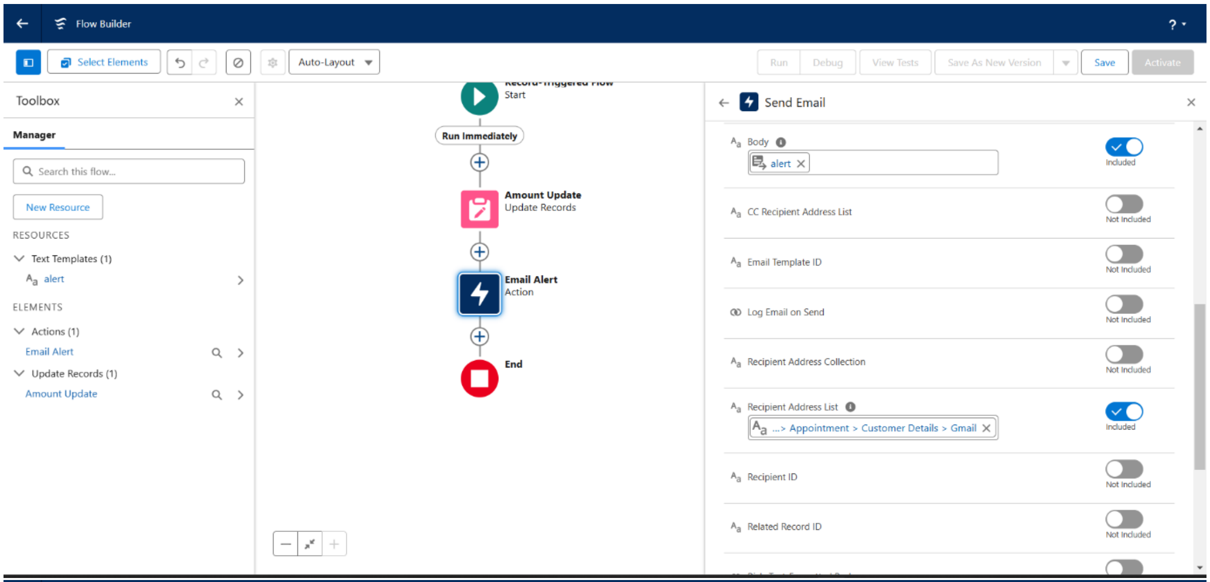


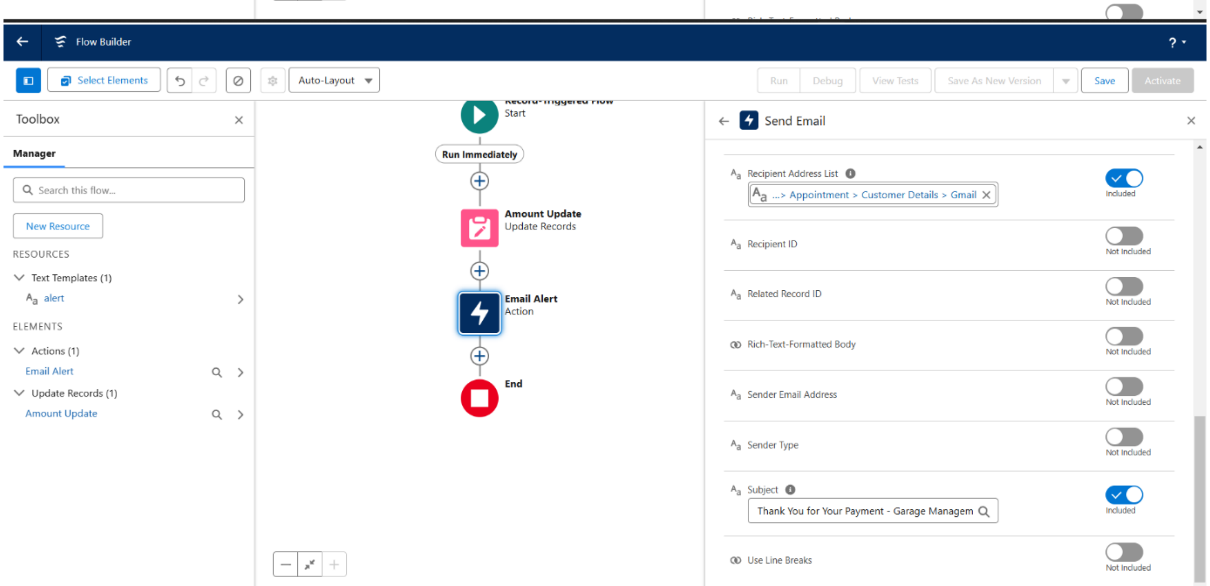

Flow Builder
Select Elements
Auto-Layout
Run
Debug
View Tests
Save As New Version
Save
Activate
Start
Record-Triggered Flow
Object: Billing details and feedback
Edit
Trigger: A record is created or updated
Optimize for: Actions and Related Records
Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Billing details...
End
Configure Start
Select Object
Select the object whose records trigger the flow when they're created, updated, or deleted.
*Object
Billing details and feedback
Configure Trigger
*Trigger the Flow When:
A record is created
A record is updated
A record is created or updated
A record is deleted
Set Entry Conditions
Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.
If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the Only when a record is updated to meet the condition requirements option for When to Run the Flow for Updated Records.
Condition Requirements
None
*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.

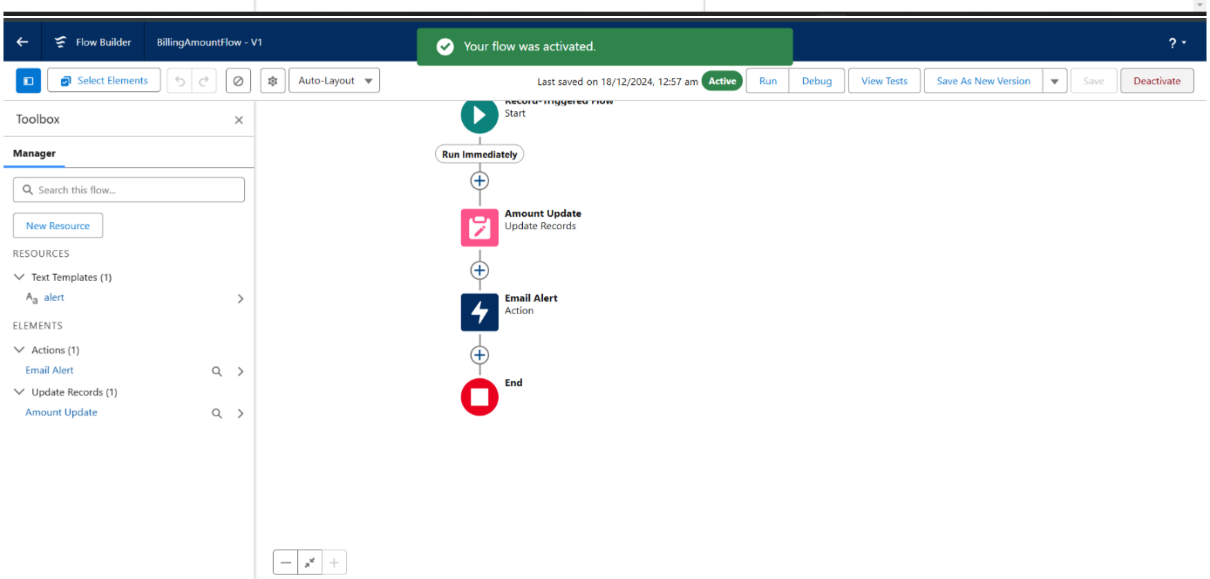

Flow Builder
Select Elements
Auto-Layout
Run
Debug
View Tests
Save As New Version
Save
Activate
Record-Triggered Flow
Start
Run Immediately
Amount Update
Update Records
End
Update Records
*Label
Amount Update
*API Name
Amount_Update
Description
*How to Find Records to Update and Set Their Values
Use 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


Flow Builder
BillingAmountFlow - V2
Select Elements
Auto-Layout
Last saved on 18/12/2024, 03:17 pm
Active
Run
Debug
View Tests
Save As New Version
Save
Deactivate
Toolbox
Manager
Search this flow...
New Resource
RESOURCES
Text Templates (1)
alert
ELEMENTS
Actions (1)
Email Alert
Update Records (1)
Amount Update
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

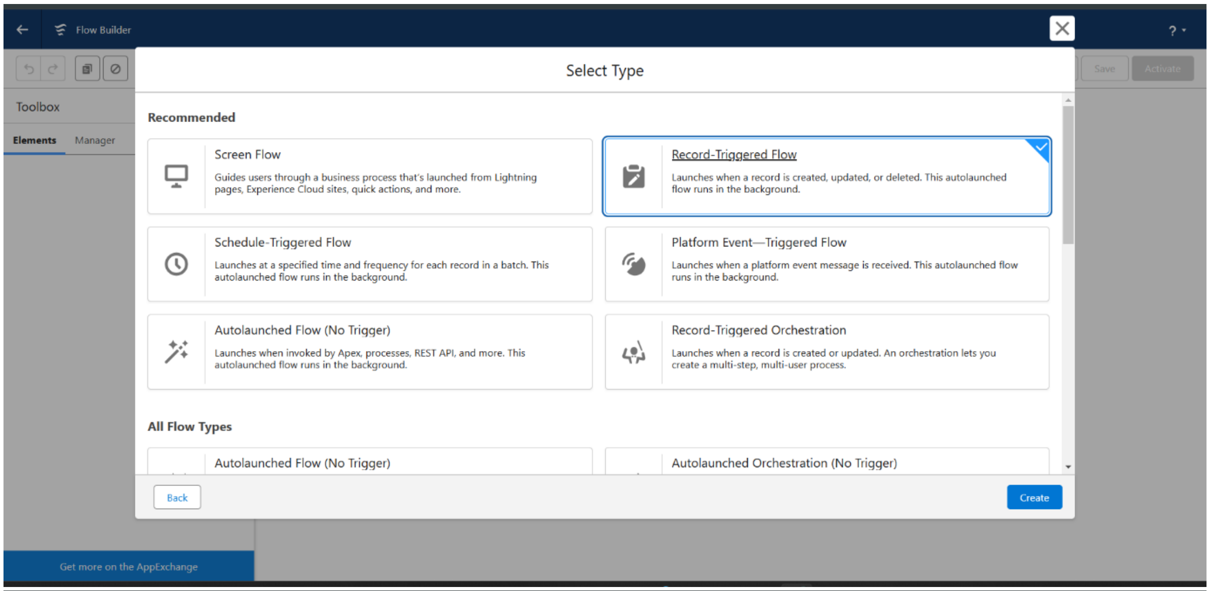

Flow Builder
Select Elements
Auto-Layout
Run
Debug
View Tests
Save As New Version
Save
Activate
Toolbox
Manager
Search this flow...
New Resource
RESOURCES
Text Templates (1)
alert
ELEMENTS
Actions (1)
Email Alert
Update Records (1)
Amount Update
Start
Run Immediately
Amount Update
Update Records
Email Alert
Action
End
Send Email
*Label
Email Alert
*API Name
Email_Alert
Description
Send Email
emailSimple-emailSimple
Use values from earlier in the flow to set the inputs for the "Send Email" core action. To use its outputs later in the flow, store them in variables.
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

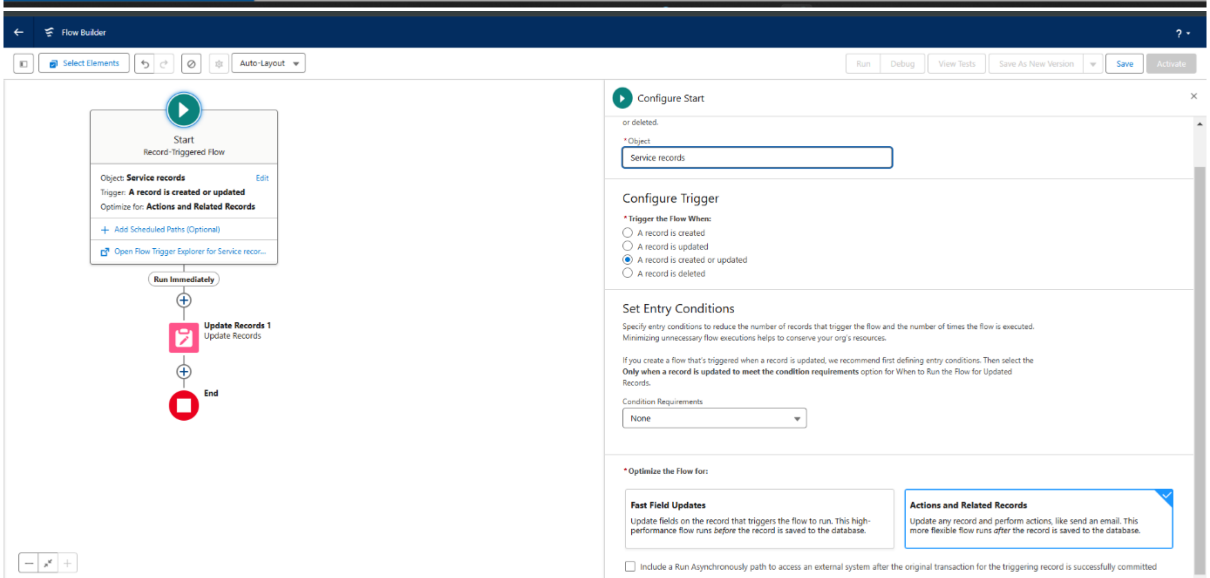

Flow Builder
Select Elements
Auto-Layout
Run
Debug
View Tests
Save As New Version
Save
Activate
Toolbox
Manager
Search this flow...
New Resource
RESOURCES
Text Templates (1)
alert
ELEMENTS
Actions (1)
Email Alert
Update Records (1)
Amount Update
Start
Run Immediately
Amount Update
Update Records
Email Alert
Action
End
Send Email
Body
alert
Included
CC Recipient Address List
Not Included
Email Template ID
Not Included
Log Email on Send
Not Included
Recipient Address Collection
Not Included
Recipient Address List
...> Appointment > Customer Details > Gmail
Included
Recipient ID
Not Included
Related Record ID
Not Included

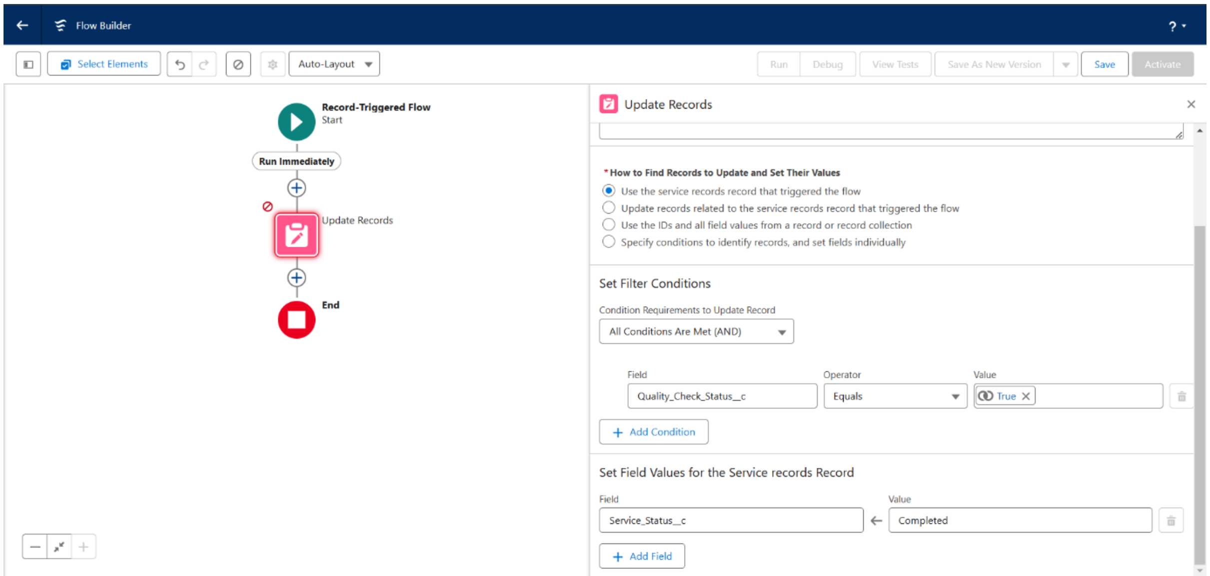

Flow Builder
Select Elements
Auto-Layout
Run
Debug
View Tests
Save As New Version
Save
Activate
Toolbox
Manager
Search this flow...
New Resource
RESOURCES
Text Templates (1)
alert
ELEMENTS
Actions (1)
Email Alert
Update Records (1)
Amount Update
Start
Run Immediately
Amount Update
Update Records
Email Alert
Action
End
Send Email
Recipient Address List
...> Appointment > Customer Details > Gmail
Included
Recipient ID
Not Included
Related Record ID
Not Included
Rich-Text-Formatted Body
Not Included
Sender Email Address
Not Included
Sender Type
Not Included
Subject
Thank You for Your Payment - Garage Managem
Included
Use Line Breaks
Not Included

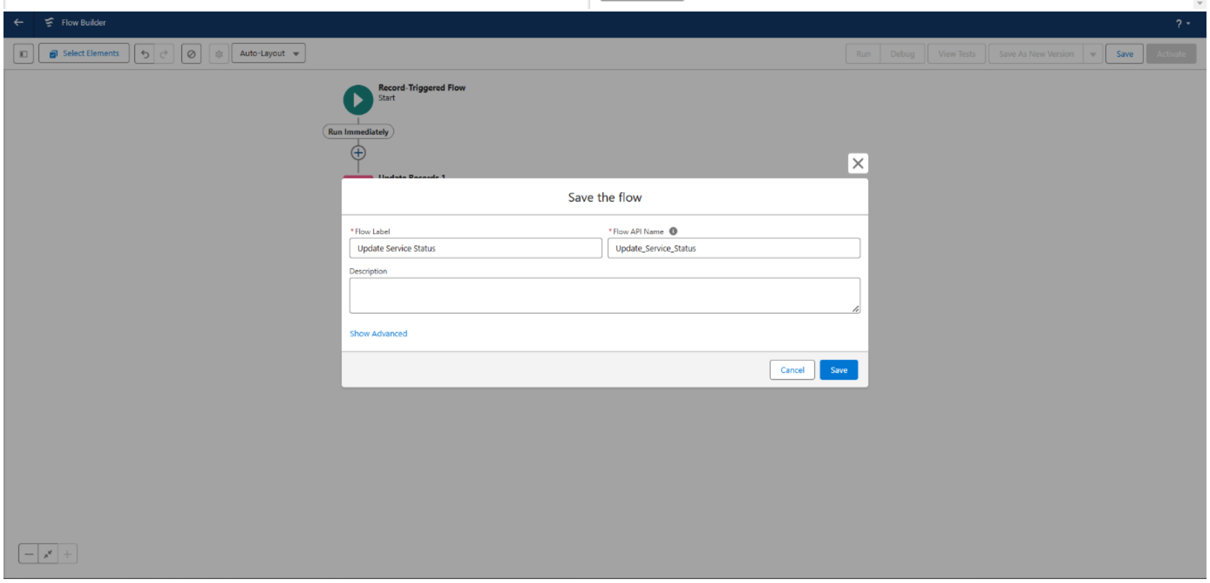

Flow Builder
BillingAmountFlow - V1
Your flow was activated.
Select Elements
Auto-Layout
Last saved on 18/12/2024, 12:57 am
Active
Run
Debug
View Tests
Save As New Version
Save
Deactivate
Toolbox
Manager
Search this flow...
New Resource
RESOURCES
Text Templates (1)
alert
ELEMENTS
Actions (1)
Email Alert
Update Records (1)
Amount Update
Start
Run Immediately
Amount Update
Update Records
Email Alert
Action
End

Create another Flow



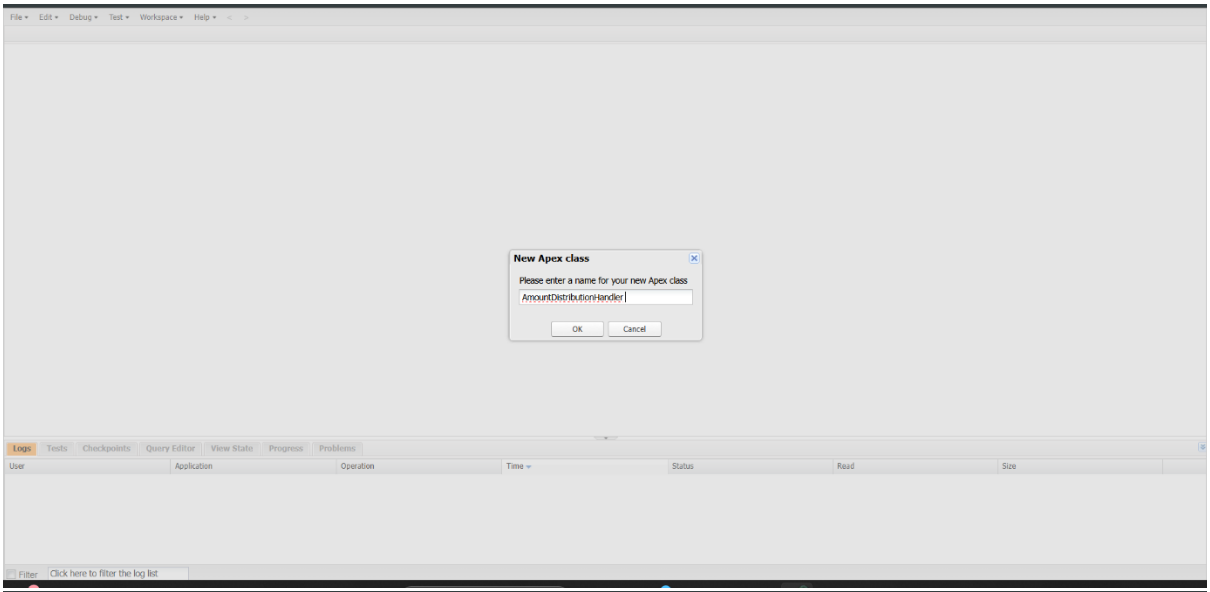


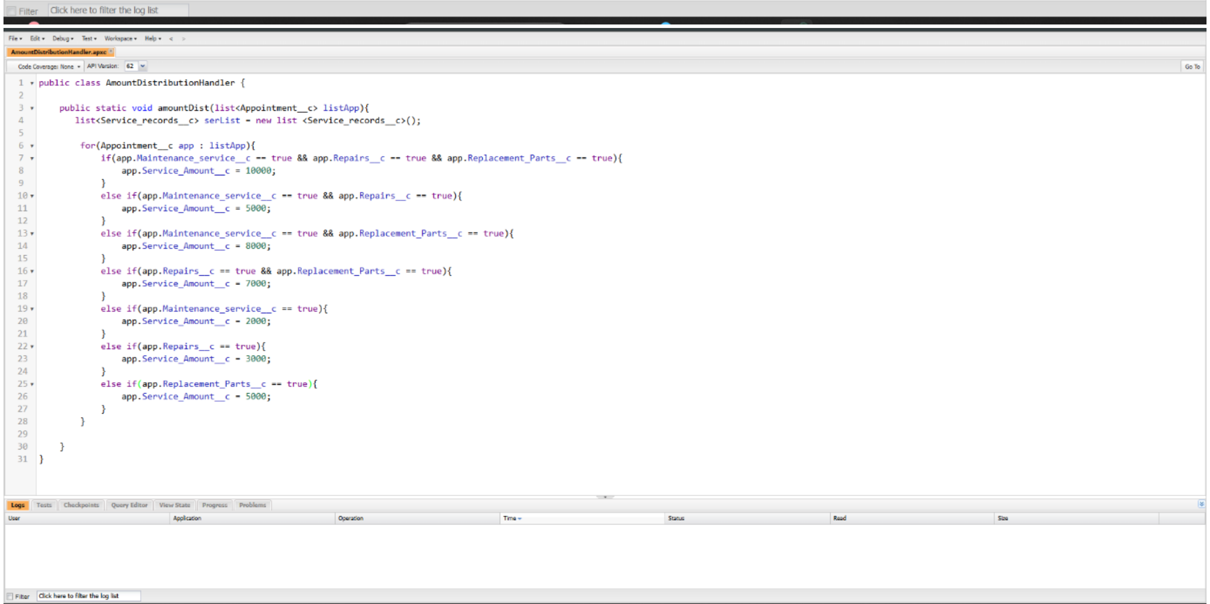

Flow Builder
Select Elements
Auto-Layout
Run
Debug
View Tests
Save As New Version
Save
Activate
Record-Triggered Flow
Start
Run Immediately
Update Records
End
Update Records
* How to Find Records to Update and Set Their Values
Use the service records record that triggered the flow
Update records related 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

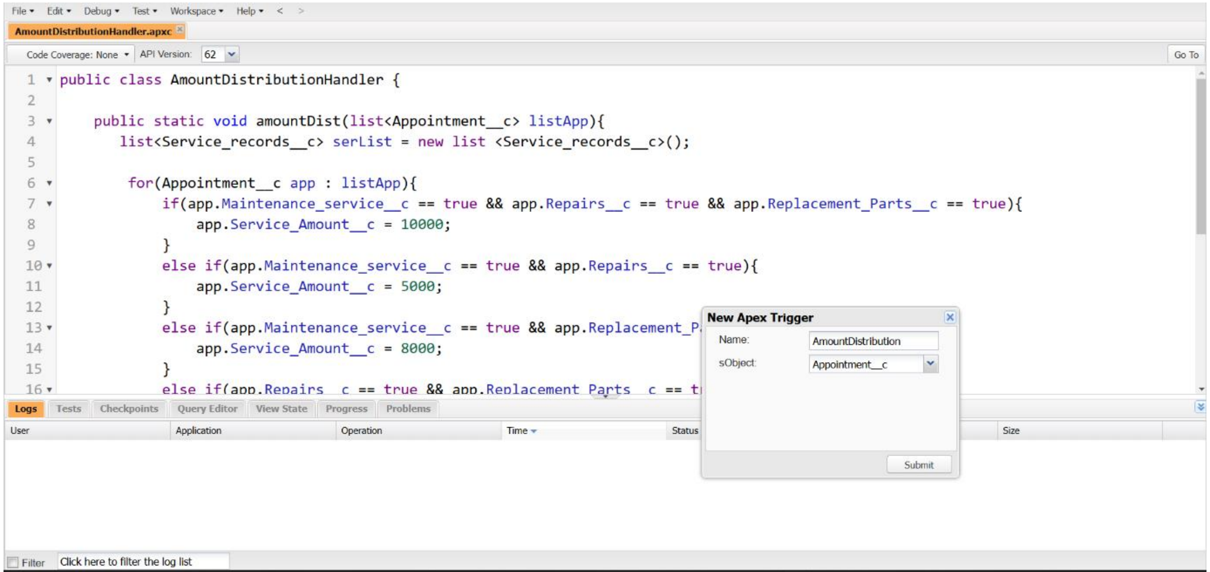

Flow Builder
Select Elements
Auto-Layout
Save
Record-Triggered Flow
Start
Run Immediately
Save the flow
* Flow Label
Update Service Status
* Flow API Name
Update_Service_Status
Description
Show Advanced
Cancel
Save

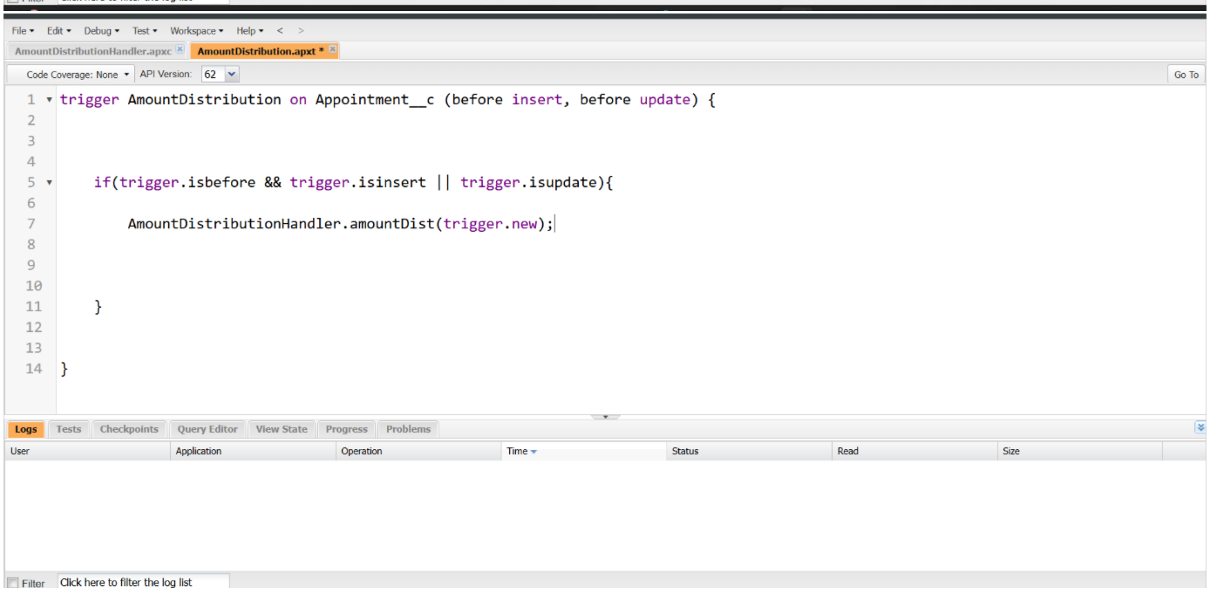
Apex Trigger

Apex handler



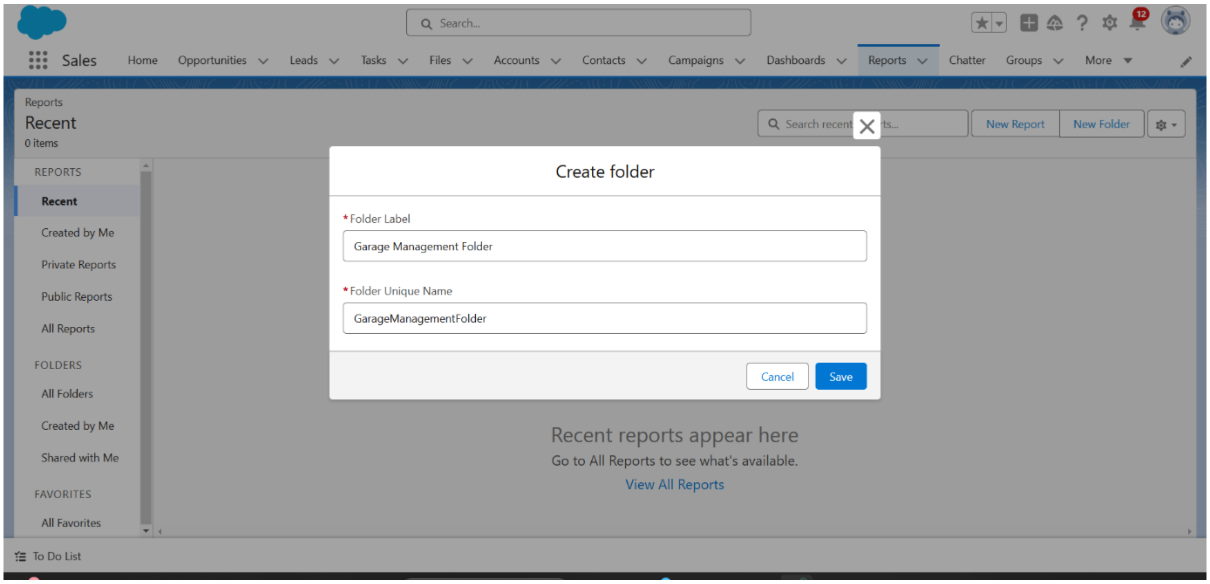



File Edit Debug Test Workspace Help
AmountDistributionHandler.apxc
Code Coverage: None
API Version: 62
Go To
public class AmountDistributionHandler {
public static void amountDist(list<Appointment__c> listApp){
list<Service_records__c> serList = new list <Service_records__c>();
for(Appointment__c app : listApp){
if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){
app.Service_Amount__c = 10000;
}
else if(app.Maintenance_service__c == true && app.Repairs__c == true){
app.Service_Amount__c = 5000;
}
else if(app.Maintenance_service__c == true && app.Replacement_P
app.Service_Amount__c = 8000;
}
else if(app.Repairs__c == true && app.Replacement_Parts__c == t
New Apex Trigger
Name: AmountDistribution
sObject: Appointment__c
Submit
Logs
Tests
Checkpoints
Query Editor
View State
Progress
Problems
User
Application
Operation
Time
Status
Size
Filter
Click here to filter the log list

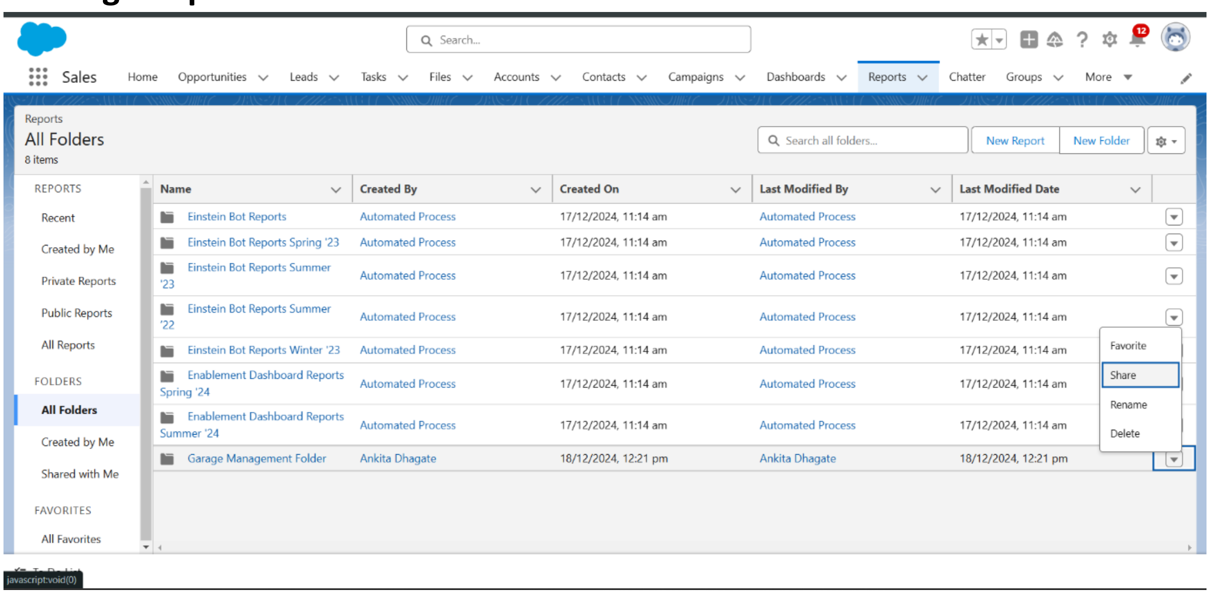

File Edit Debug Test Workspace Help
AmountDistributionHandler.apxc
AmountDistribution.apxt *
Code Coverage: None
API Version: 62
Go To
trigger AmountDistribution on Appointment__c (before insert, before update) {
if(trigger.isbefore && trigger.isinsert || trigger.isupdate){
AmountDistributionHandler.amountDist(trigger.new);
}
}
Logs
Tests
Checkpoints
Query Editor
View State
Progress
Problems
User
Application
Operation
Time
Status
Read
Size
Filter
Click here to filter the log list

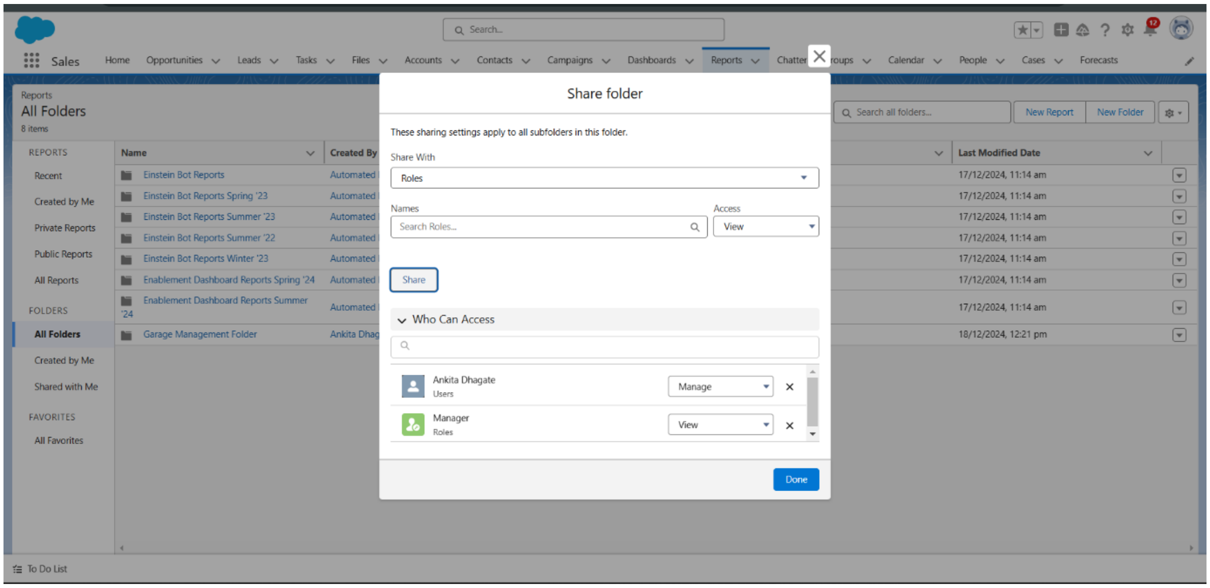
Reports

create a report folder

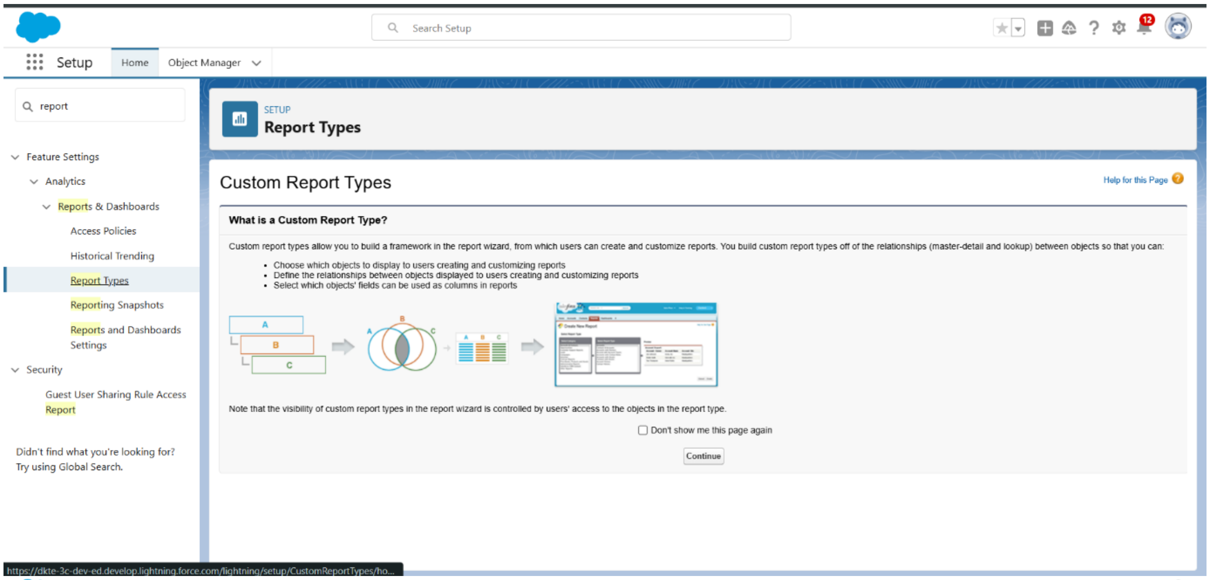
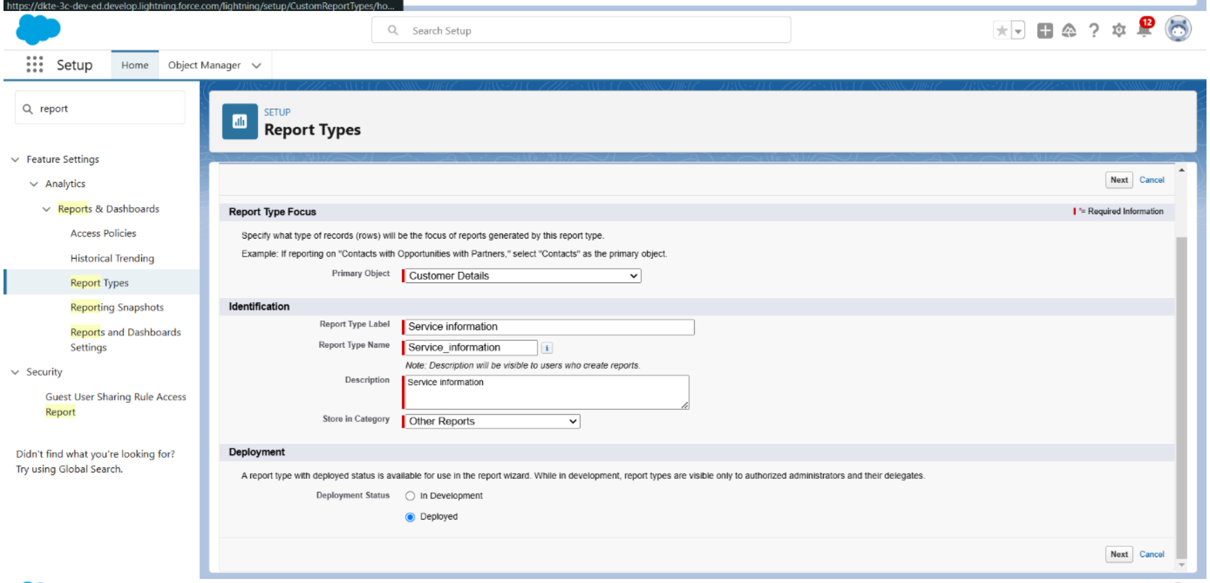
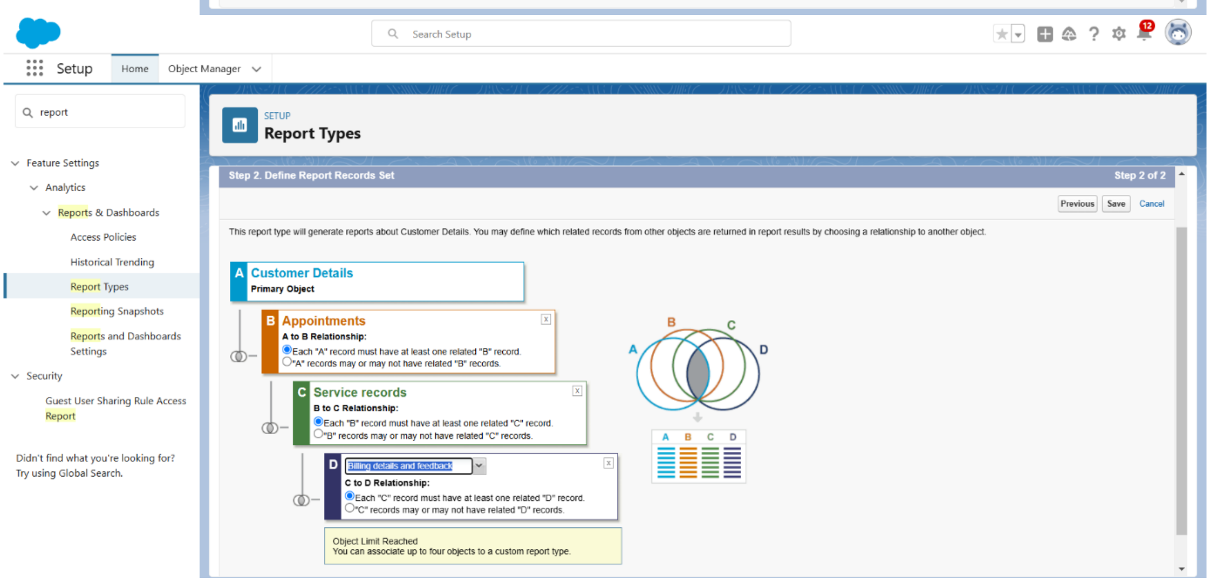


Sharing a report folder



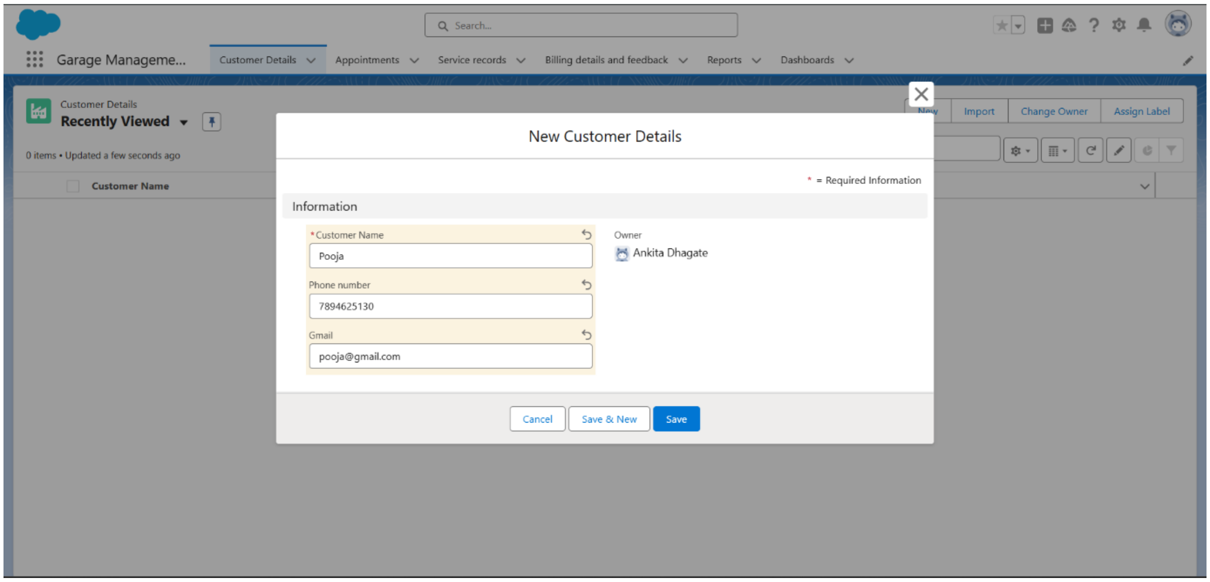


Create Report Type

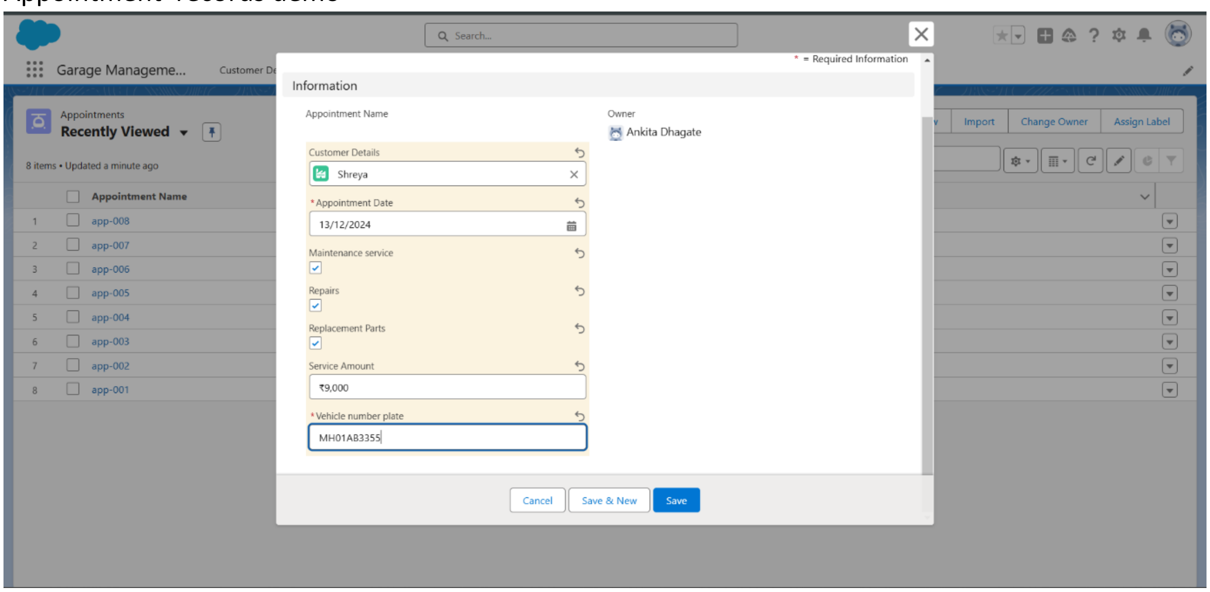

Search Setup
Setup
Home
Object Manager
report
Feature Settings
Analytics
Reports & Dashboards
Access Policies
Historical Trending
Report Types
Reporting Snapshots
Reports and Dashboards Settings
Security
Guest User Sharing Rule Access Report
Didn't find what you're looking for? Try using Global Search.
SETUP
Report Types
Custom Report Types
Help for this Page
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 objects' 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
https://dkte-3c-dev-ed.develop.lightning.force.com/lightning/setup/CustomReportTypes/ho...

Search Setup
Setup
Home
Object Manager
report
Feature Settings
Analytics
Reports & Dashboards
Access Policies
Historical Trending
Report Types
Reporting Snapshots
Reports and Dashboards Settings
Security
Guest User Sharing Rule Access Report
Didn't find what you're looking for? Try using Global Search.
SETUP
Report Types
Next
Cancel
Report Type Focus
= Required Information
Specify what type of records (rows) will be the focus of reports generated by this report type.
Example: If reporting on "Contacts with Opportunities with Partners," select "Contacts" as the primary object.
Primary Object
Customer Details
Identification
Report Type Label
Service information
Report Type Name
Service_information
Note: Description will be visible to users who create reports.
Description
Service information
Store in Category
Other Reports
Deployment
A report type with deployed status is available for use in the report wizard. While in development, report types are visible only to authorized administrators and their delegates.
Deployment Status
In Development
Deployed
Next
Cancel

Search Setup
Setup
Home
Object Manager
report
Feature Settings
Analytics
Reports & Dashboards
Access Policies
Historical Trending
Report Types
Reporting Snapshots
Reports and Dashboards Settings
Security
Guest User Sharing Rule Access Report
Didn't find what you're looking for? Try using Global Search.
SETUP
Report Types
Step 2. Define Report Records Set
Step 2 of 2
Previous
Save
Cancel
This report type will generate reports about Customer Details. You may define which related records from other objects are returned in report results by choosing a relationship to another object.
A Customer Details
Primary Object
B Appointments
A to B Relationship:
Each "A" record must have at least one related "B" record.
"A" records may or may not have related "B" records.
C Service records
B to C Relationship:
Each "B" record must have at least one related "C" record.
"B" records may or may not have related "C" records.
D Billing details and feedback
C to D Relationship:
Each "C" record must have at least one related "D" record.
"C" records may or may not have related "D" records.
Object Limit Reached
You can associate up to four objects to a custom report type.

Create Report

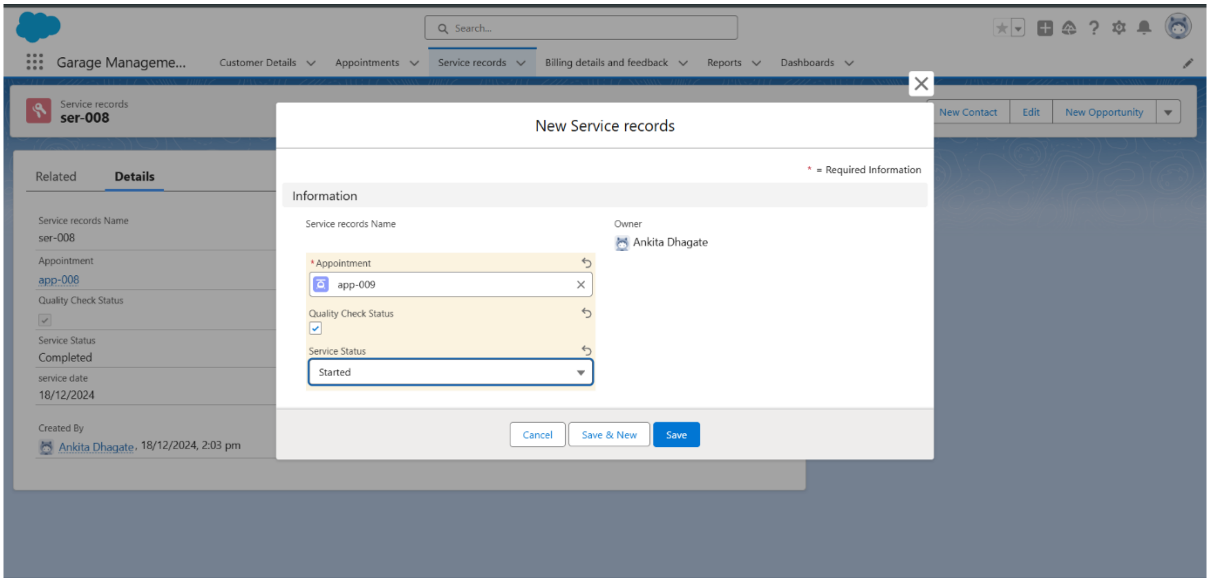
Customer Record demo



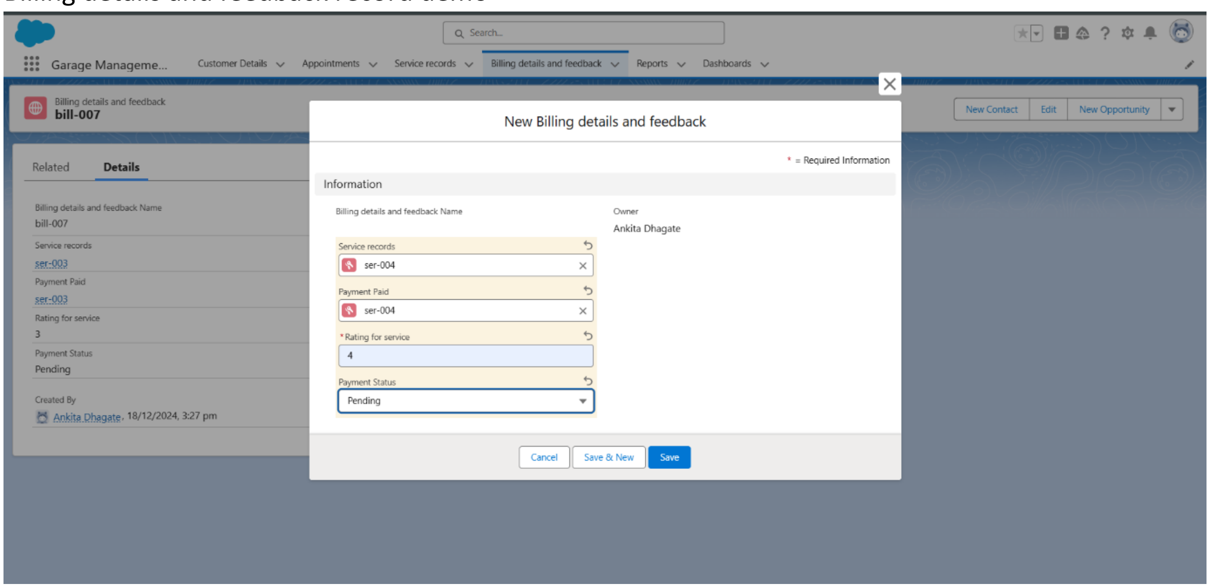
Appointment records demo



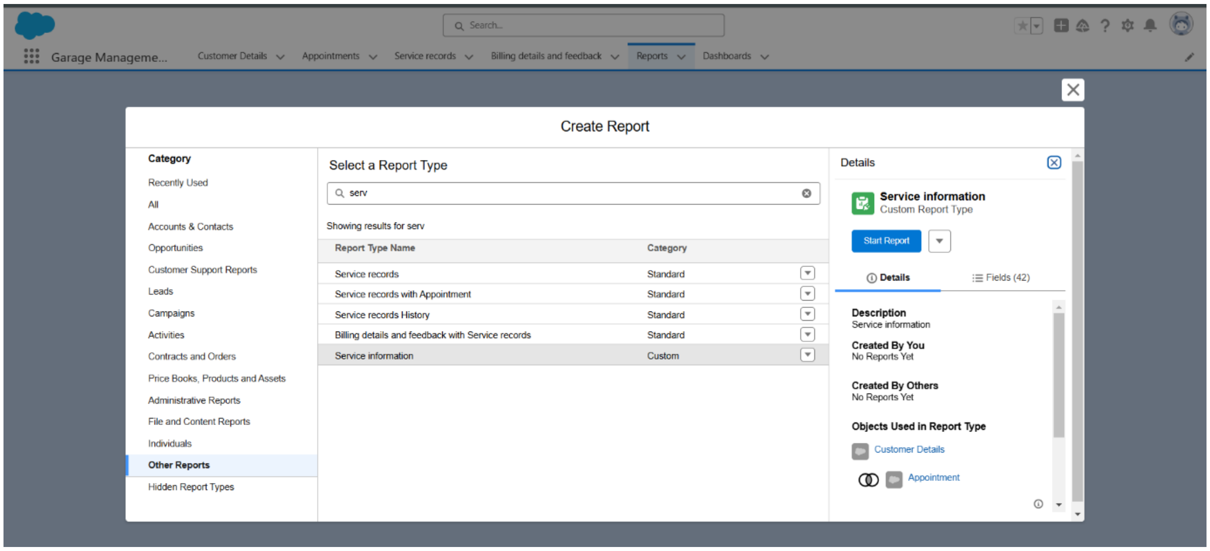
Service records demo

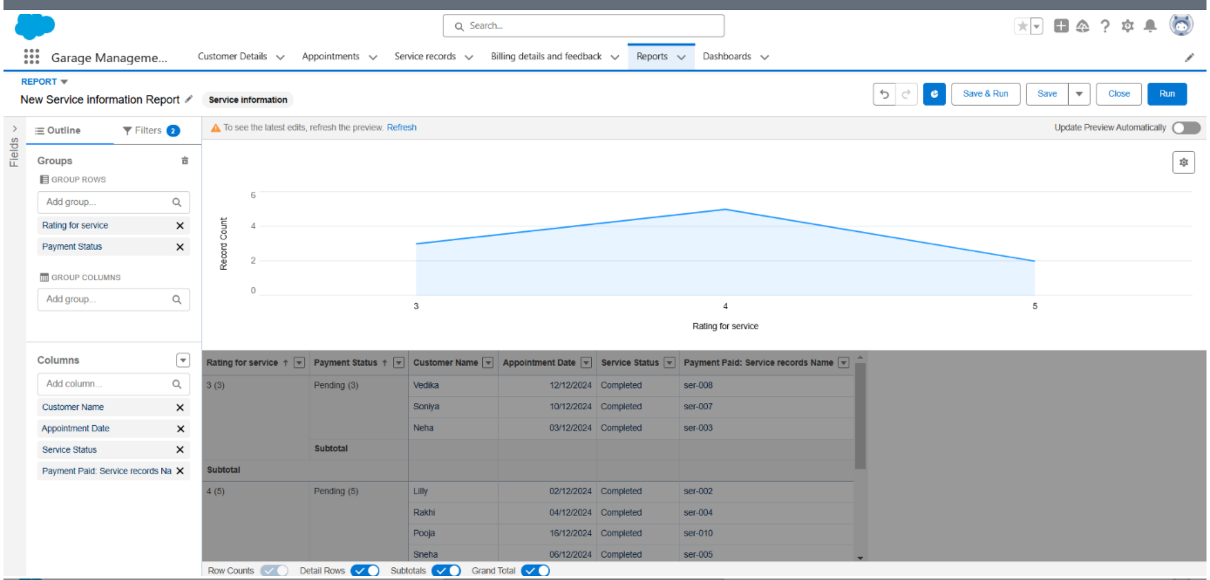


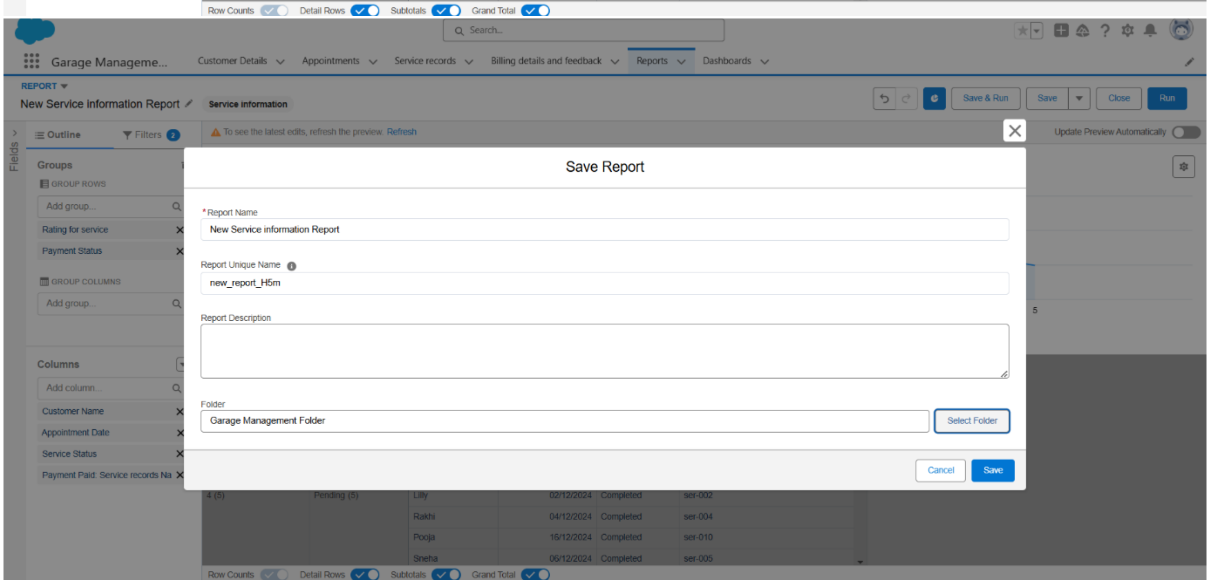
Billing details and feedback record demo



Create Report

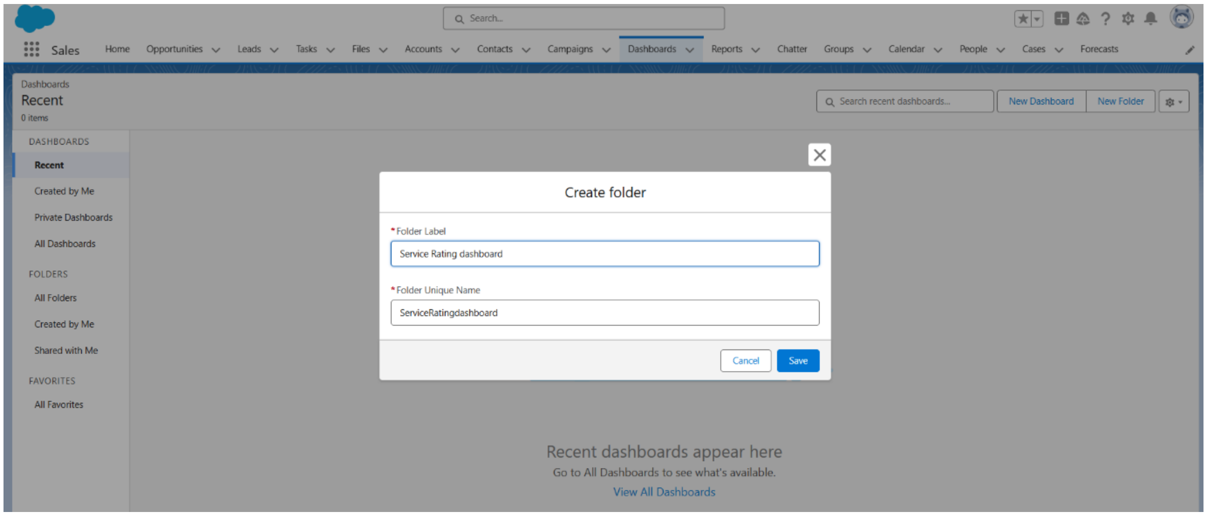


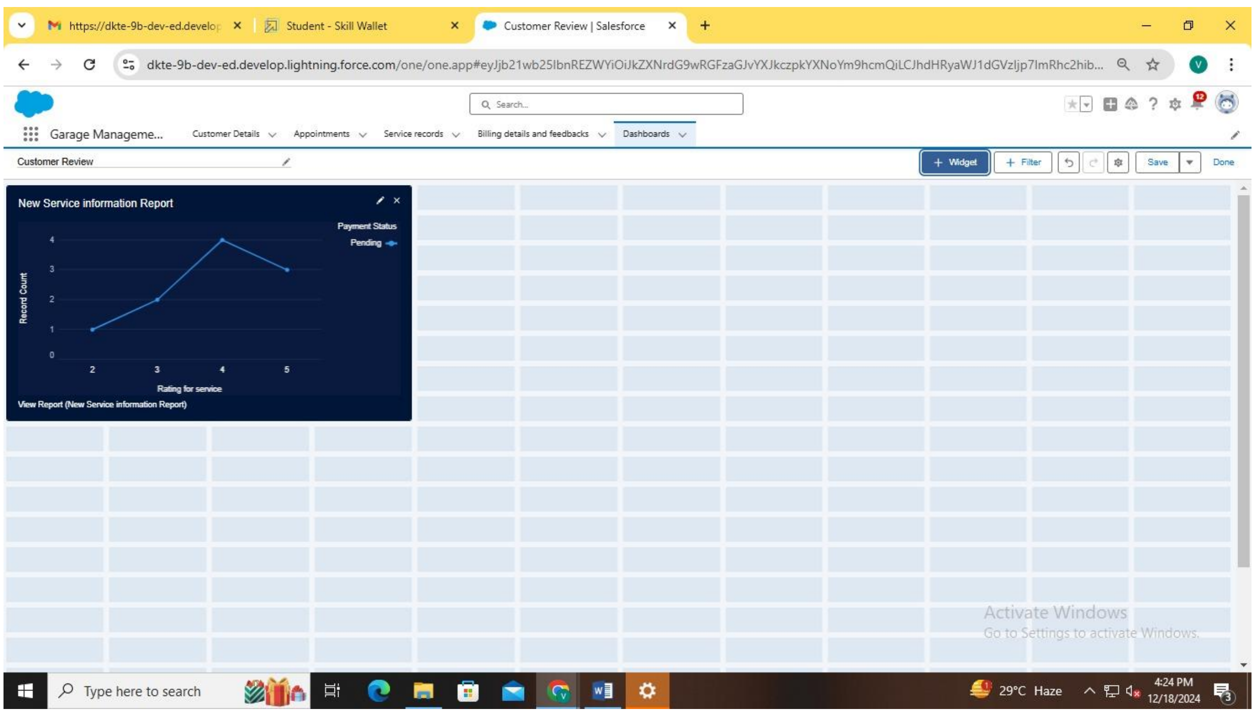




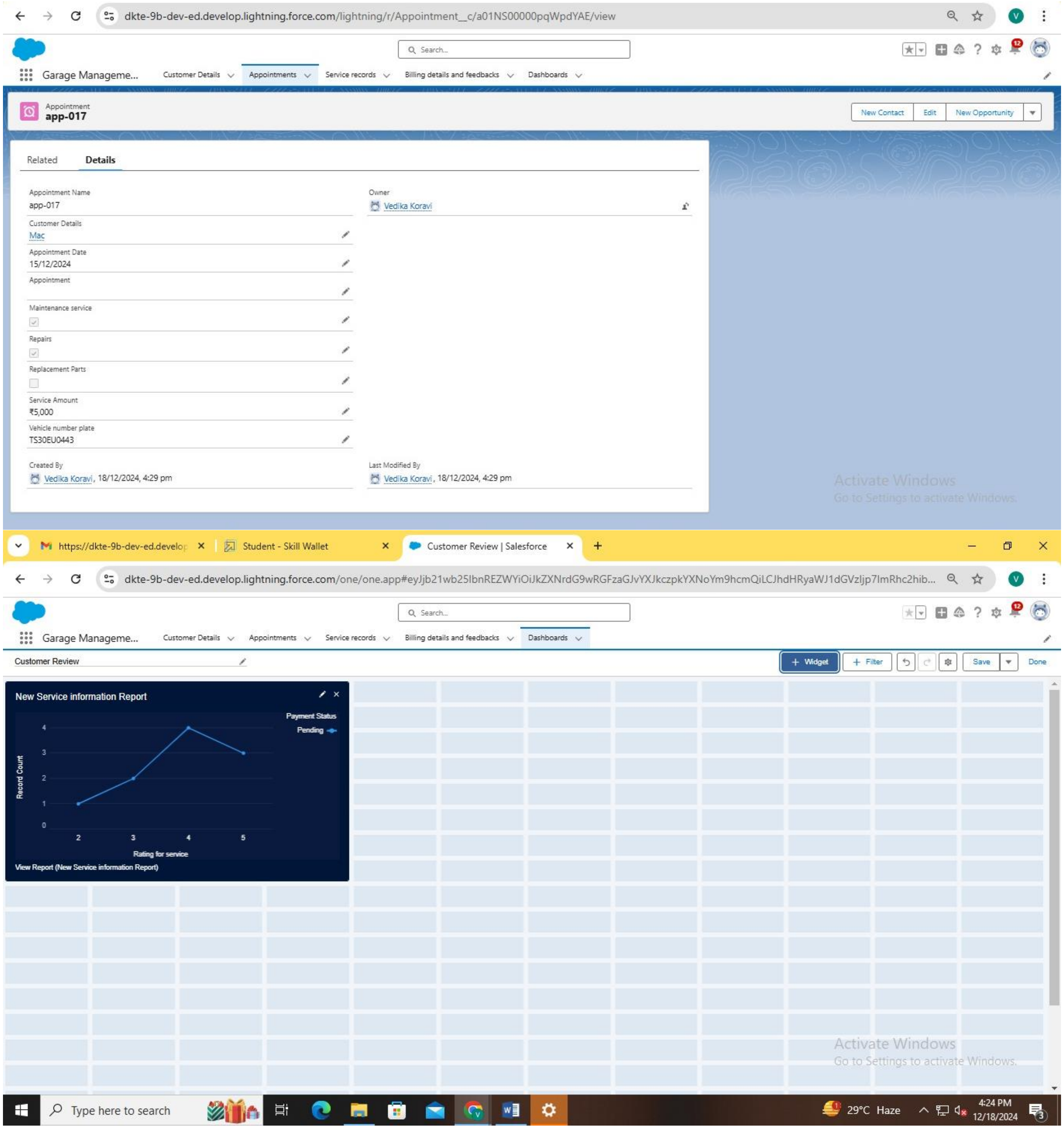
Dashboards

Create Dashboard Folder





Create Dashboard



User Adoption

creating records