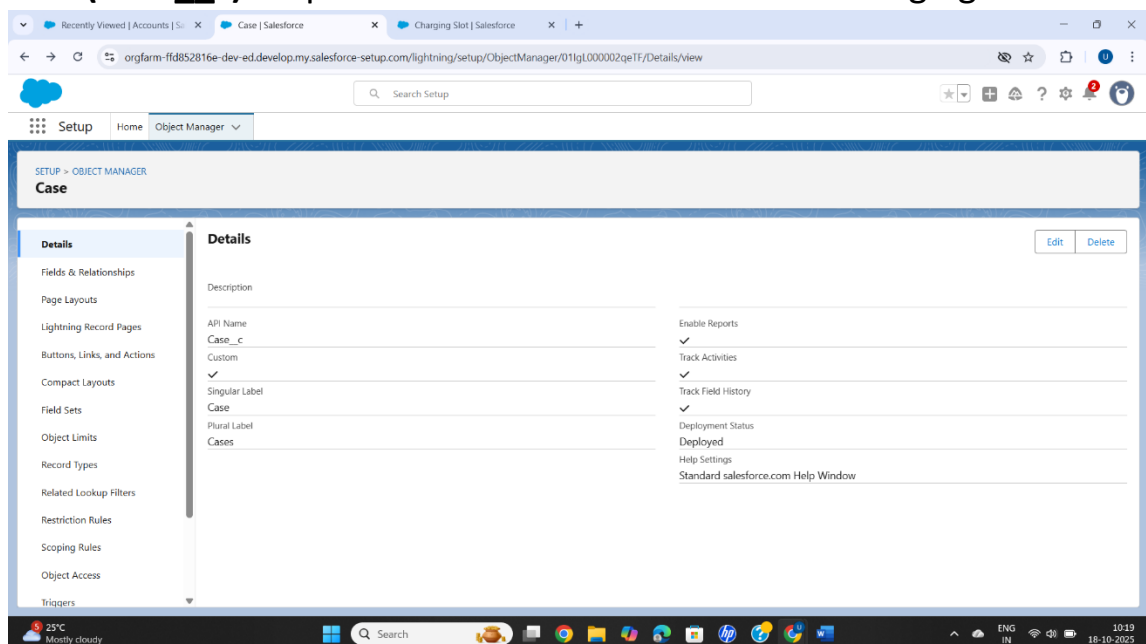


Phase 3: Data Model & Security Details

Custom Objects Created

The following custom objects form the core data model for the EV Charging CRM:

- **Charging Station (Charging_Station__c):** Represents a physical charging station location.
- **Charging Slot (Charging_Slot__c):** Represents an individual charging point/bay within a Station. (Master-Detail relationship to Station).
- **Booking (Booking__c):** Records a customer's reservation of a specific Slot for a specific time. (Lookup relationships to Account, Contact, Slot, Vehicle).
- **Payment (Payment__c):** Records financial transactions related to Bookings. (Lookup relationship to Booking, Account/Contact).
- **Vehicle (Vehicle__c):** Represents a customer's electric vehicle. (Lookup relationship to Account/Contact).
- **Case (Case__c):** Represents customer's issues after charging.



Recently Viewed | Accounts | Salesforce | Booking | Salesforce | Charging Slot | Salesforce

orgfarm-ff852816e-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01lgL000002qOD8/Details/view

Setup Home Object Manager

Booking

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Triggers

Details

Description

API Name
Booking__c

Custom

Singular Label
Booking

Plural Label
Bookings

Enable Reports

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete

25°C Mostly cloudy

Search

Recently Viewed | Accounts | Salesforce | Charging Slot | Salesforce | Charging Slot | Salesforce

orgfarm-ff852816e-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01lgL000002qNqb/Details/view

Setup Home Object Manager

Charging Slot

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Details

Description

API Name
Charging_Slot__c

Custom

Singular Label
Charging Slot

Plural Label
Charging Slots

Enable Reports

Track Activities

Track Field History

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Edit Delete

Recently Viewed | Accounts | Setup | Charging Station | Salesforce | Charging Slot | Salesforce

orgfarm-ftd852816e-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01gl000002qNnO/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Charging Station

[Edit](#) [Delete](#)

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Details

Description

API Name
Charging_Station__c

Custom

✓

Singular Label
Charging Station

Plural Label
Charging Stations

Enable Reports

✓

Track Activities

✓

Track Field History

✓

Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

25°C Mostly cloudy

Recently Viewed | Accounts | Setup | Payment | Salesforce | Charging Slot | Salesforce

orgfarm-ftd852816e-dev-ed.develop.my.salesforce-setup.com/lightning/setup/ObjectManager/01gl000002qOQ5/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Payment

[Edit](#) [Delete](#)

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Restriction Rules

Scoping Rules

Object Access

Details

Description

API Name
Payment__c

Custom

✓

Singular Label
Payment

Plural Label
Payments

Enable Reports

✓

Track Activities

✓

Track Field History

✓

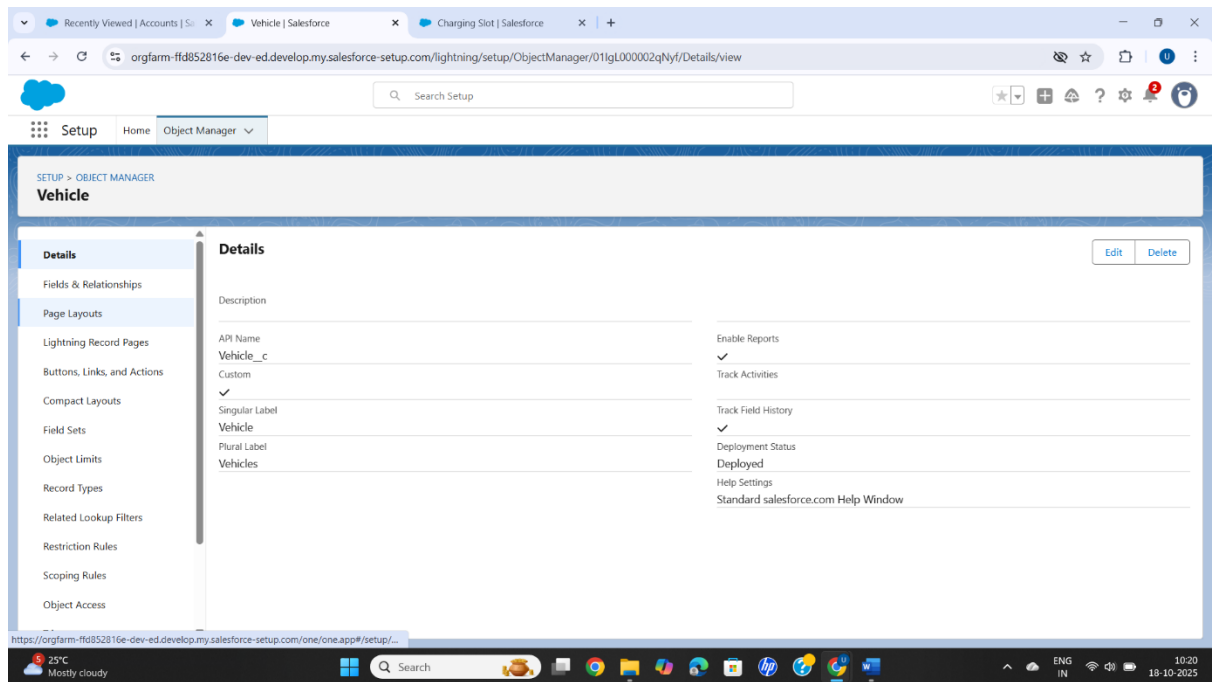
Deployment Status

Deployed

Help Settings

Standard salesforce.com Help Window

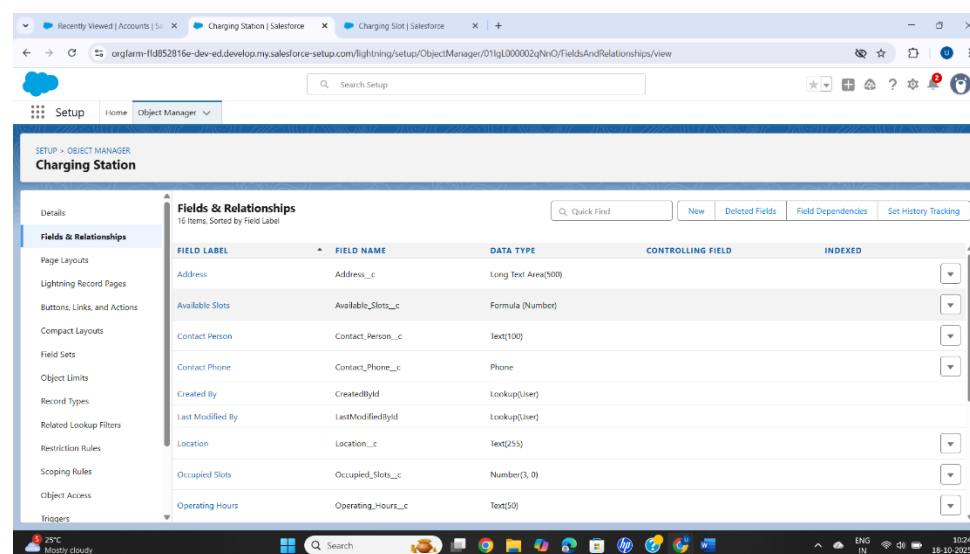
https://orgfarm-ftd852816e-dev-ed.develop.my.salesforce-setup.com/one/one.app#/setup/ObjectManager/01gl000002qOQ5/LightningPages/view



Key Fields & Relationships:

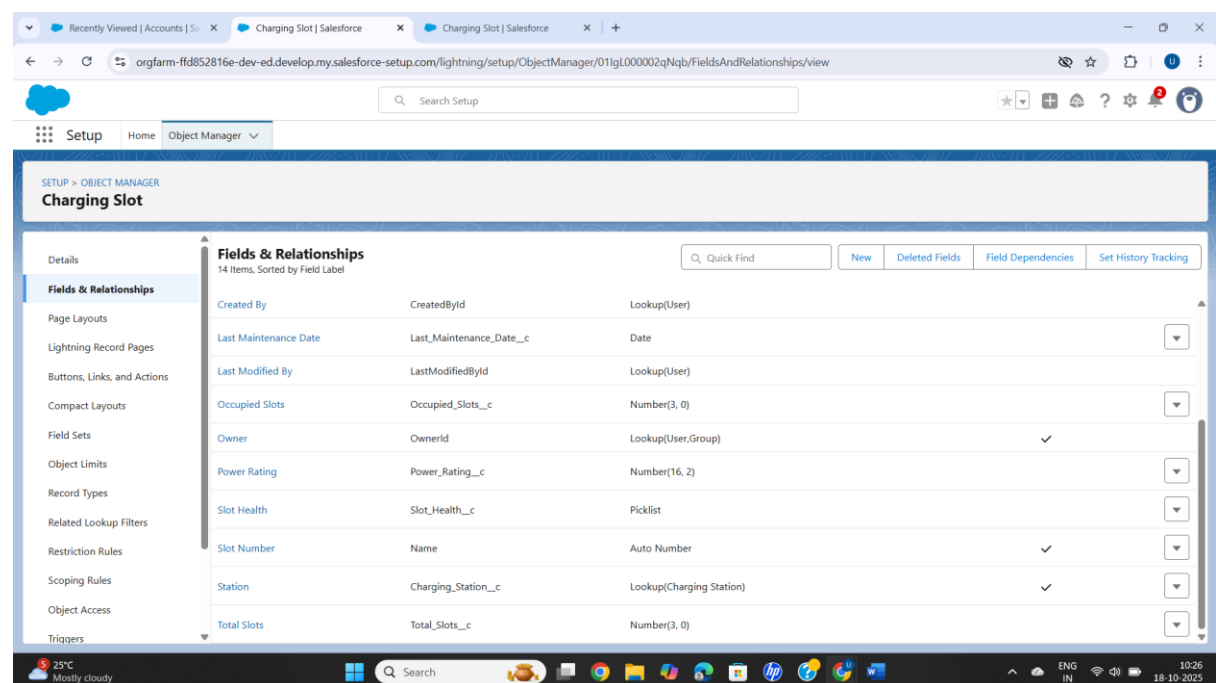
1. Charging Station (Charging_Station__c)

- Name (Text, Standard Name Field)
- Location__c (Geolocation)
- Address__c (Address Compound Field or individual Text fields)
- Status__c (Picklist: Operational, Maintenance, Offline)
- Number_of_Slots__c (Number, potentially Roll-Up Summary from Slots)



2. Slot (Slot__c)

- Name (Text, Standard Name Field or Auto-Number)
- Station__c (**Master-Detail(Station)**) - *Crucial for "Controlled by Parent" sharing.*
- Availability__c (Picklist: Available, Unavailable, Reserved, Maintenance) - *Updated by trigger/flow.*
- Connector_Type__c (Picklist: Type 2, CCS, CHAdeMO, etc.)
- Hourly_Rate__c (Currency) - *Used in payment calculation.*



3. Booking (Booking__c)

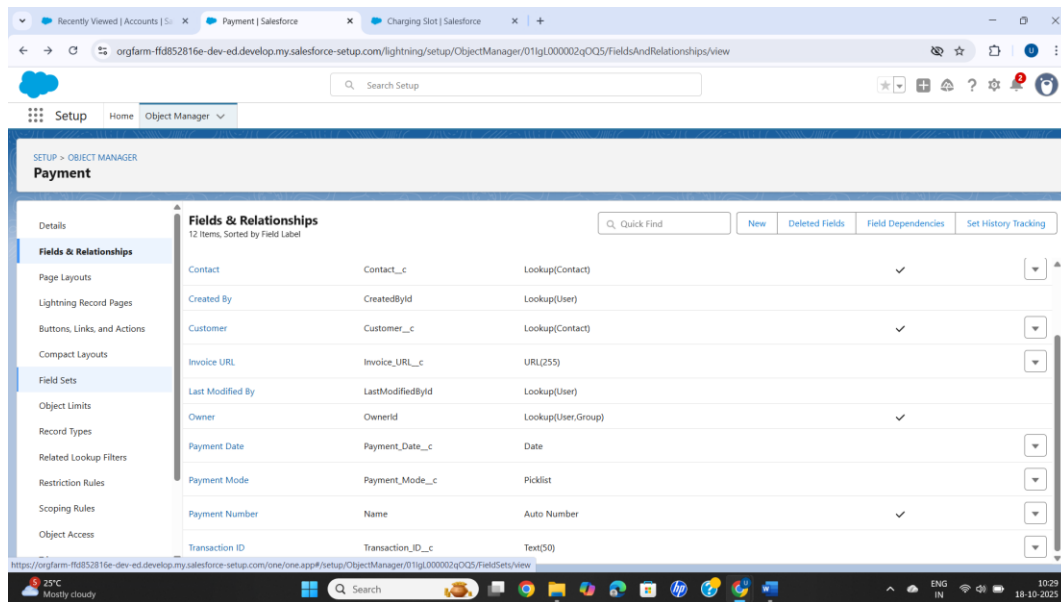
- Booking_Number__c (Auto-Number, Standard Name Field)
- Account__c (Lookup(Account))
- Contact__c (Lookup(Contact))
- Vehicle__c (Lookup(Vehicle))
- Station__c (Formula field pulling from Slot__r.Station__c)
- Slot__c (Lookup(Slot)) - *Links booking to the specific slot.*
- Start_Time__c (Date/Time)

- End_Time__c (Date/Time, Optional - depends on booking model)
- Status__c (Picklist: Pending, Confirmed, In Progress, Completed, Cancelled) - *Triggers automations.*
- Total_Price__c (Currency) - *Calculated or set upon completion.*
- Payment_Status__c (Picklist: Unpaid, Paid, Failed) - *Updated by payment integration/process.*
- Reminder_Sent__c (Checkbox) - *Used by reminder flow.*

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Booking Number	Name	Auto Number		✓
Booking Status	Booking_Status__c	Picklist		
Charging Slot	Charging_Slot__c	Lookup(Charging Slot)		✓
Charging Station	Charging_Station__c	Lookup(Charging Station)		✓
Contact	Contact__c	Lookup(Contact)		✓
Cost	Cost__c	Currency(16, 2)		
Created By	CreatedById	Lookup(User)		
Customer	Customer__c	Lookup(Contact)		✓
Duration	Duration__c	Formula (Number)		

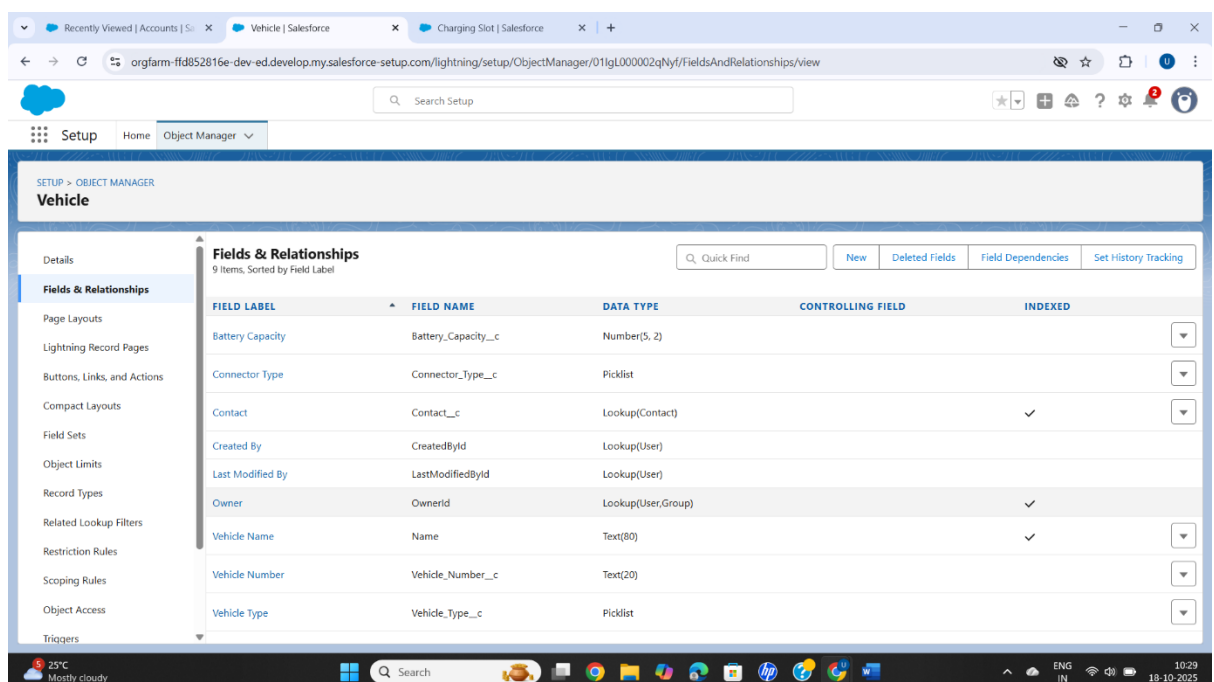
4. Payment (Payment__c)

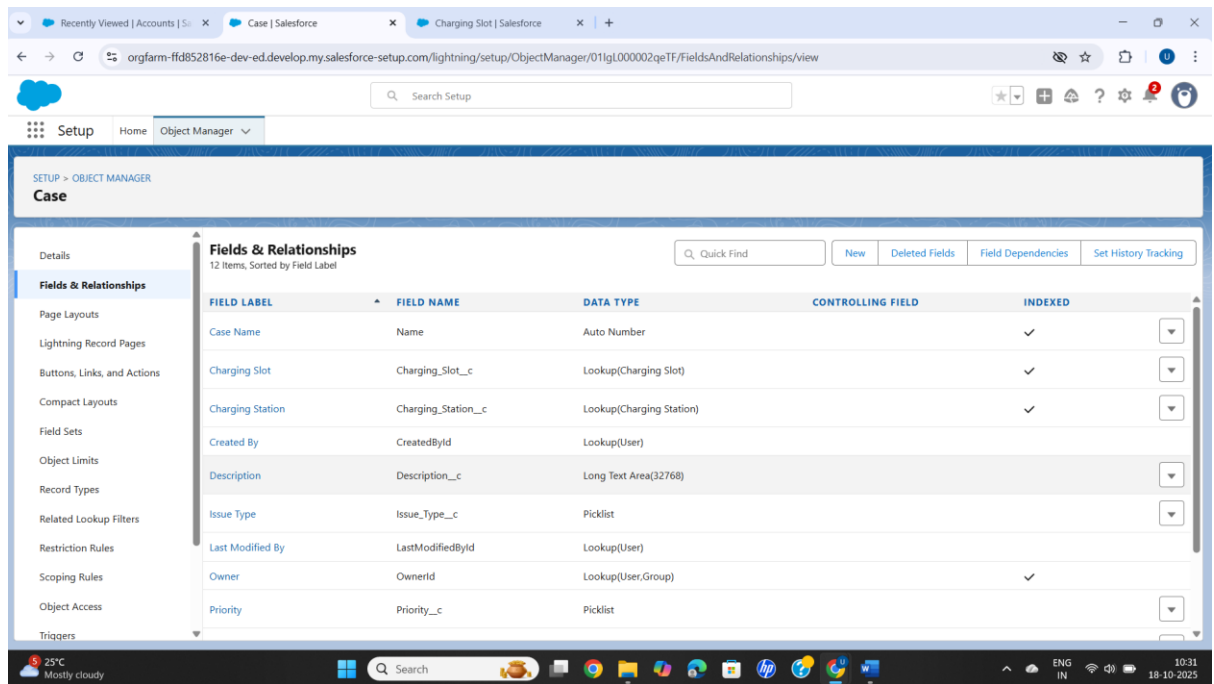
- Payment_ID__c (Auto-Number or Text, Standard Name Field)
- Booking__c (Lookup(Booking))
- Account__c / Contact__c (Lookup(Account/Contact))
- Amount__c (Currency)
- Payment_Date__c (Date/Time)
- Status__c (Picklist: Pending, Succeeded, Failed)
- Transaction_ID__c (Text, External ID - for linking to payment gateway)



5. Vehicle (Vehicle__c)

- Vehicle_Identifier__c (Text, Standard Name Field - e.g., License Plate)
- Account__c / Contact__c (Lookup(Account/Contact))
- Make__c (Text or Picklist)
- Model__c (Text or Picklist)
- VIN__c (Text)





Sharing Rules

- **Object:** Booking (Booking__c)
- **Organization-Wide Default (OWD):** Private
- **Rule Name:** Share Bookings within Station
- **Purpose:** To allow all Station Staff members working at the *same* station to see *all* bookings for that station, even if they don't own the booking record.
- **Criteria:** Records owned by members of Role: Station Staff (Or based on a field like Booking__c.Station__c matching the user's assigned station if using criteria-based rules).
- **Share with:** Role: Station Staff (Or a Public Group containing all staff for a specific station).
- **Access Level:** Read Only (or Read/Write if staff need to modify each other's bookings).

Recently Viewed | Accounts | Sharing Settings | Salesforce | Charging Slot | Salesforce

orgfarm-ffd852816e-dev-ed.develop.my.salesforce-setup.com/lightning/setup/SecuritySharing/home

Search Setup

SetupHomeObject Manager

shar

Security

Guest UserSharing Rule Access Report

Sharing Settings

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

SETUP

Sharing Settings

No sharing rules specified.

Booking Sharing Rules

NewRecalculate

Booking Sharing Rules Help

No sharing rules specified.

Case Sharing Rules

NewRecalculate

Case Sharing Rules Help

No sharing rules specified.

Charging Slot Sharing Rules

NewRecalculate

Charging Slot Sharing Rules Help

Action	Criteria	Shared With	Access Level
Edit Del	(Charging Slot: Total Slots EQUALS 100) AND (Charging Slot: Slot Number CONTAINS pending)	Role: Station Staff	Read Only

Charging Station Sharing Rules

NewRecalculate

Charging Station Sharing Rules Help

No sharing rules specified.

Payment Sharing Rules

NewRecalculate

Payment Sharing Rules Help

No sharing rules specified.

Vehicle Sharing Rules

NewRecalculate

Vehicle Sharing Rules Help

No sharing rules specified.

26°CPartly sunny

Search

ENG IN10:4218-10-2025