

# **Salesforce App Project - System Design & Implementation**

Yein Jeong

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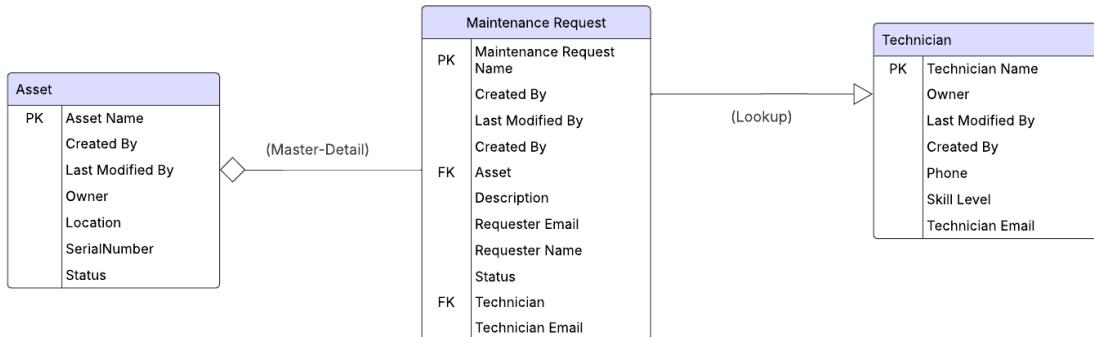
## Overview

This Project is deliverable of designing and implementing a SaaS application using Force.com. This application includes various functions, including object modelling, user interface configuration, security settings, workflow automation and so on. It was implemented based on the low-code development environment of Salesforce, focusing on practice. This portfolio organises the included main components by categories and shows the process of a comprehensive understanding of SaaS development using the Force.com platform.

## System Scenario

This application is the **Equipment Maintenance Tracker**, which is designed to help organisations or IT teams manage equipment (assets) and maintenance schedules efficiently. The **maintenance requester** makes a maintenance request for the relevant asset, and the automated alert manages the maintenance schedule not get delayed, and the maintenance status is also updated systematically. Therefore, it is possible that the maintenance request is managed regularly and contributes to improving failure prevention and operational efficiency.

## Data model



## Object and its field

### Object overview

#### Custom Objects

Help for this Page [?](#)

Custom objects are database tables that allow you to store data specific to your organization in Salesforce. You can use custom objects to extend Salesforce functionality or to build new application functionality.

Once you have created a custom object, you can create a custom tab, custom related lists, reports, and dashboards for users to interact with the custom object data. You can also access custom object data through the API.

New Custom Object   Schema Builder				
Action	Label	Master Object	Deployed	Description
Edit   Del	Asset		✓	This object represents equipment or facility assets.
Edit   Del	Maintenance Request	Asset	✓	This object manages maintenance requests for specific assets.
Edit   Del	Technician		✓	This object stores information about technicians responsible for handling maintenance tasks.

## Asset

#### Custom Object Asset

Help for this Page [?](#)

Standard Fields (5) | Custom Fields & Relationships (3) | Validation Rules (0) | Page Layouts (1) | Field Sets (0) | Compact Layouts (1) | Search Layouts (6) | Buttons, Links, and Actions (8) | Record Types (0) | Apex Sharing Reasons (0) | Apex Sharing Recalculation (0) | Object Limits (11)

#### Custom Object Definition Detail

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

Singular Label	Asset	Description	This object represents equipment or facility assets.
Plural Label	Assets	Enable Reports	✓
Object Name	Asset	Track Activities	✓
API Name	Asset_c	Allow in Chatter Groups	<input type="checkbox"/>
		Allow Sharing	✓
		Allow Bulk API Access	✓
		Allow Streaming API Access	✓
		Track Field History	✓
		Enable Licensing	<input type="checkbox"/>
		Deployment Status	Deployed
		Allow Search	✓
		Help Settings	Standard salesforce.com Help Window
Created By	Yein Jeong, 4/5/2025, 11:15 am	Modified By	Yein Jeong, 4/5/2025, 11:15 am

Standard Fields							<a href="#">Standard Fields Help</a>
Action	Field Label	Field Name	Data Type	Controlling Field	Indexed	Track History	
Edit	<a href="#">Asset Name</a>	Name	Text(80)		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
	<a href="#">Created By</a>	CreatedBy	Lookup(User)		<input type="checkbox"/>	<input type="checkbox"/>	
	<a href="#">Last Modified By</a>	LastModifiedBy	Lookup(User)		<input type="checkbox"/>	<input type="checkbox"/>	
Edit	<a href="#">Owner</a>	Owner	Lookup(User,Group)		<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Custom Fields & Relationships			<a href="#">New</a>	<a href="#">Field Dependencies</a>	<a href="#">Set History Tracking</a>	Custom Fields & Relationships Help <a href="#">?</a>		
Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By	Track History	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Location</a>	Location__c	Text(100)			Yein Jeong, 4/5/2025, 11:50 am	<input type="checkbox"/>	
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">SerialNumber</a>	SerialNumber__c	Auto Number (Unique Case Insensitive)	<input checked="" type="checkbox"/>		Yein Jeong, 4/5/2025, 12:54 pm	<input type="checkbox"/>	
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Replace</a>	<a href="#">Status</a>	Status__c	Picklist			Yein Jeong, 4/5/2025, 11:48 am	<input type="checkbox"/>	

## ❖ Asset object creation test

Asset Edit

## New Asset

Help for this Page ?

Asset Edit

Save Save & New Cancel

Information | = Required Information

Asset Name	<input type="text"/>	Owner	Yein Jeong
Status	<input checked="" type="radio"/> Active <input type="radio"/>		
Location	<input type="text"/>		

Save Save & New Cancel

## Maintenance Request

Custom Object Maintenance Request

[Help for this Page](#)

[Standard Fields \[3\]](#) | [Custom Fields & Relationships \[8\]](#) | [Validation Rules \[4\]](#) | [Page Layouts \[1\]](#) | [Field Sets \[0\]](#) | [Compact Layouts \[1\]](#) | [Search Layouts \[6\]](#) | [Buttons, Links, and Actions \[8\]](#) | [Record Types \[0\]](#) | [Object Limits \[10\]](#)

Custom Object Definition Detail		<a href="#">Edit</a>	<a href="#">Delete</a>
Singular Label	Maintenance Request	Description	This object manages maintenance requests for specific assets.
Plural Label	Maintenance Requests	Enable Reports	<input checked="" type="checkbox"/>
Object Name	Maintenance_Request	Track Activities	<input checked="" type="checkbox"/>
API Name	Maintenance_Request__c	Allow in Chatter Groups	<input type="checkbox"/>
		Allow Sharing	<input checked="" type="checkbox"/>
		Allow Bulk API Access	<input checked="" type="checkbox"/>
		Allow Streaming API Access	<input checked="" type="checkbox"/>
		Track Field History	<input checked="" type="checkbox"/>
		Enable Licensing	<input type="checkbox"/>
		Deployment Status	Deployed
		Allow Search	<input checked="" type="checkbox"/>
		Help Settings	Standard salesforce.com Help Window
Created By	Yein Jeong	Modified By	Yein Jeong
	4/5/2025, 11:17 am		4/5/2025, 4:01 pm

Related Lookup Filters				
No related lookup filters defined.				
Validation Rules				
Action	Rule Name	Error Location	Error Message	Active Modified By
Edit   Del	<a href="#">Request_Cannot_Be_during_Inactive</a>	Asset	Cannot create maintenance request for an inactive asset.	<input checked="" type="checkbox"/> Yein Jeong, 4/5/2025, 12:44 pm
Edit   Del	<a href="#">RequestDate_CannotBeFuture</a>	Request Date	Request date cannot be in the future.	<input checked="" type="checkbox"/> Yein Jeong, 4/5/2025, 12:49 pm
Edit   Del	<a href="#">Technician_Email_Match</a>	Technician Email	If either the Technician or Technician Email is filled in, both fields must be completed.	<input checked="" type="checkbox"/> Yein Jeong, 11/5/2025, 4:26 pm
Edit   Del	<a href="#">Technician_Required_For_Status</a>	Technician	Technician must be assigned when the status is In Progress or Completed.	<input checked="" type="checkbox"/> Yein Jeong, 11/5/2025, 4:25 pm

Triggers				
No triggers defined				

Page Layouts				
Action	Page Layout Name	Created By	Modified By	Page Layouts Help
Edit   Del	Maintenance Request Layout	Yein Jeong, 4/5/2025, 11:17 am	Yein Jeong	4/5/2025, 4:51 pm

## ❖ Maintenance Request object creation test

Maintenance Request Edit

New Maintenance Request

Help for this Page

Maintenance Request Edit

Information

Maintenance Request Name:

Asset:

Description:

Request Date:  [ 26/5/2025 ]

Status:  New

Technician:

Technician Email:

Requester Name:

Requester Email:

Required Information:

Save Save & New Cancel

## Technician

Custom Object Definition Detail		Description	
Singular Label	Technician	Description	This object stores information about technicians responsible for handling maintenance tasks.
Plural Label	Technicians	Enable Reports	<input checked="" type="checkbox"/>
Object Name	Technician	Track Activities	<input checked="" type="checkbox"/>
API Name	Technician__c	Allow in Chatter Groups	<input type="checkbox"/>
		Allow Sharing	<input checked="" type="checkbox"/>
		Allow Bulk API Access	<input checked="" type="checkbox"/>
		Allow Streaming API Access	<input checked="" type="checkbox"/>
		Track Field History	<input checked="" type="checkbox"/>
		Enable Licensing	<input type="checkbox"/>
		Deployment Status	Deployed
		Allow Search	<input checked="" type="checkbox"/>
		Help Settings	Standard salesforce.com Help Window
Created By	Yein Jeong, 4/5/2025, 11:18 am	Modified By	Yein Jeong, 4/5/2025, 11:18 am

Standard Fields							Standard Fields Help <a href="#">?</a>
Action	Field Label	Field Name	Data Type	Controlling Field	Indexed	Track History	
Edit   Del	<u>Created By</u>	CreatedBy	Lookup(User)			<input type="checkbox"/>	
Edit   Del	<u>Last Modified By</u>	LastModifiedBy	Lookup(User)			<input type="checkbox"/>	
Edit	<u>Owner</u>	Owner	Lookup(User,Group)		<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Edit	<u>Technician Name</u>	Name	Text(80)		<input checked="" type="checkbox"/>	<input type="checkbox"/>	

Custom Fields & Relationships							Custom Fields & Relationships Help <a href="#">?</a>
Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By	Track History
Edit   Del	<u>Phone</u>	Phone_c	Phone			Yein Jeong, 4/5/2025, 11:37 am	<input type="checkbox"/>
Edit   Del   Replace	<u>Skill Level</u>	Skill_Level_c	Picklist			Yein Jeong, 4/5/2025, 11:38 am	<input type="checkbox"/>
Edit   Del	<u>Technician Email</u>	Technician_Email_c	Email (Unique)	<input checked="" type="checkbox"/>		Yein Jeong, 4/5/2025, 11:36 am	<input type="checkbox"/>

## ❖ Technician object creation test

Technician Edit [Help for this Page !\[\]\(caa21e8da556fb9950196b297f1bfb4b\_img.jpg\)](#)

New Technician

Technician Edit [Save](#) [Save & New](#) [Cancel](#)

Information		Required Information
Technician Name	<input type="text"/>	Owner Yein Jeong
Technician Email	<input type="text"/>	
Phone	<input type="text"/>	
Skill Level	--None-- <input type="button" value="▼"/>	

[Save](#) [Save & New](#) [Cancel](#)

## Validation Rules

\*All these validation rules are created under the Maintenance Request object

### Validation Rule Overview

Validation Rules					New	Validation Rules Help <a href="#">?</a>
Action	Rule Name	Error Location	Error Message	Active	Modified By	
Edit   Del	<u>Request_Cannot_Be_during_Inactive</u>	Asset	Cannot create maintenance request for an inactive asset.	<input checked="" type="checkbox"/>	Yein Jeong, 4/5/2025, 12:44 pm	
Edit   Del	<u>RequestDate_CannotBeFuture</u>	Request Date	Request date cannot be in the future.	<input checked="" type="checkbox"/>	Yein Jeong, 4/5/2025, 12:49 pm	
Edit   Del	<u>Technician_Email_Match</u>	Technician Email	If either the Technician or Technician Email is filled in, both fields must be completed.	<input checked="" type="checkbox"/>	Yein Jeong, 11/5/2025, 4:26 pm	
Edit   Del	<u>Technician_Required_For_Status</u>	Technician	Technician must be assigned when the status is In Progress or Completed.	<input checked="" type="checkbox"/>	Yein Jeong, 11/5/2025, 4:25 pm	

### Validation Rule 1: Request\_Cannot\_Be\_during\_Inactive

# Maintenance Request Validation Rule

Help for this Page 

[Back to Maintenance Request](#)

## Validation Rule Detail

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Rule Name	Request_Cannot_Be_during_Inactive	<input checked="" type="checkbox"/>
Error Condition Formula	IS PICKVAL(Asset__r.Status__c, "Inactive")	
Error Message	Cannot create maintenance request	Error Location Asset
Description	Disallow creation of a maintenance request if the linked asset's status is set to "Inactive".	
Created By	Yein Jeong, 4/5/2025, 12:44 pm	Modified By Yein Jeong, 4/5/2025, 12:44 pm

[Edit](#) [Clone](#)

## ❖ Trigger Test Result (Validation Rule 1)

Maintenance Request Edit  New Maintenance Request

Maintenance Request Edit [Save](#) [Save & New](#) [Cancel](#)

Error: Invalid Data.  
Review all error messages below to correct your data.

Information	<small>! = Required Information</small>
Maintenance Request Name	<input type="text" value="Test1"/>
Asset	<input type="text" value="Printer - HR Department"/>  <small>Error: Cannot create maintenance request for an inactive asset.</small>
Description	<input type="text" value="This is test."/>
Request Date	<input type="text" value="26/5/2025"/> [ 26/5/2025 ]
Status	<input type="text" value="In Progress"/> 
Technician	<input type="text" value="Alex Kim"/> 
Technician Email	<input type="text" value="bella060131@gmail.com"/>
Requester Name	<input type="text" value="Yein Jeong"/>
Requester Email	<input type="text" value="bella060131@gmail.com"/>

[Save](#) [Save & New](#) [Cancel](#)

## Validation Rule 2: RequestDate\_CannotBeFuture

# Maintenance Request Validation Rule

Help for this Page 

[Back to Maintenance Request](#)

### Validation Rule Detail

[Edit](#) [Clone](#)

Rule Name	RequestDate_CannotBeFuture Active	<input checked="" type="checkbox"/>
Error Condition Formula	Request_Date__c > TODAY()	
Error Message	Request date cannot be in the Error Location Request Date future.	
Description	Ensures that each asset has a unique serial number to prevent duplication.	
Created By	Yein Jeong, 4/5/2025, 12:49 pm	Modified By Yein Jeong, 4/5/2025, 12:49 pm

[Edit](#) [Clone](#)

### Trigger Test Result (Validation Rule 2)

Maintenance Request Edit [Help for this Page](#) 

## New Maintenance Request

Maintenance Request Edit [Save](#) [Save & New](#) [Cancel](#)

Error: Invalid Data.  
Review all error messages below to correct your data.

Information | Required Information

Maintenance Request Name	Test1
Asset	Projector 
Description	This is test.
Request Date	27/5/2025 [ 26/5/2025 ]
	Error: Request date cannot be in the future.
Status	In Progress 
Technician	Alex Kim 
Technician Email	bella060131@gmail.com
Requester Name	Yein Jeong
Requester Email	bella060131@gmail.com

[Save](#) [Save & New](#) [Cancel](#)

## Validation Rule 3: Technician\_Email\_Match

# Maintenance Request Validation Rule

[Help for this Page](#) 

[Back to Maintenance Request](#)

### Validation Rule Detail

[Edit](#) [Clone](#)

Rule Name	Technician_Email_Match	Active	<input checked="" type="checkbox"/>
Error Condition Formula	OR( AND( NOT(ISBLANK(Technician__c)), ISBLANK(Technician_Email__c) ), AND( NOT(ISBLANK(Technician_Email__c)), ISBLANK(Technician__c) ) )		
Error Message	If either the Technician or Technician Email is filled in, both fields must be completed.	Error Location	Technician Email
Description	Technician and Email Must Be Together		
Created By	<u>Yein Jeong</u> , 11/5/2025, 4:26 pm	Modified By	<u>Yein Jeong</u> , 11/5/2025, 4:26 pm

[Edit](#) [Clone](#)

### ❖ Trigger Test Result (Validation Rule 3)

Maintenance Request Edit	Maintenance Request Edit																																												
<p>New Maintenance Request</p> <p><a href="#">Maintenance Request Edit</a> <a href="#">Save</a> <a href="#">Save &amp; New</a> <a href="#">Cancel</a></p> <p>Error: Invalid Data. Review all error messages below to correct your data.</p> <table border="1"> <tr> <td><b>Information</b></td> <td>Required Information</td> </tr> <tr> <td>Maintenance Request Name: <input type="text" value="Test1"/></td> <td></td> </tr> <tr> <td>Asset: <input type="text" value="Projector"/> </td> <td></td> </tr> <tr> <td>Description: <input type="text" value="This is test."/></td> <td></td> </tr> <tr> <td>Request Date: <input type="text" value="26/5/2025"/> [ 26/5/2025 ]</td> <td></td> </tr> <tr> <td>Status: <input type="text" value="In Progress"/> </td> <td></td> </tr> <tr> <td>Technician: <input type="text" value="Alex Kim"/> </td> <td></td> </tr> <tr> <td>Technician Email: <input type="text" value="Error: If either the Technician or Technician Email is filled in, both fields must be completed."/> </td> <td>Error: If either the Technician or Technician Email is filled in, both fields must be completed.</td> </tr> <tr> <td>Requester Name: <input type="text" value="Yein Jeong"/></td> <td></td> </tr> <tr> <td>Requester Email: <input type="text" value="bella060131@gmail.com"/></td> <td></td> </tr> <tr> <td colspan="2"><a href="#">Save</a> <a href="#">Save &amp; New</a> <a href="#">Cancel</a></td> </tr> </table>	<b>Information</b>	Required Information	Maintenance Request Name: <input type="text" value="Test1"/>		Asset: <input type="text" value="Projector"/> 		Description: <input type="text" value="This is test."/>		Request Date: <input type="text" value="26/5/2025"/> [ 26/5/2025 ]		Status: <input type="text" value="In Progress"/> 		Technician: <input type="text" value="Alex Kim"/> 		Technician Email: <input type="text" value="Error: If either the Technician or Technician Email is filled in, both fields must be completed."/> 	Error: If either the Technician or Technician Email is filled in, both fields must be completed.	Requester Name: <input type="text" value="Yein Jeong"/>		Requester Email: <input type="text" value="bella060131@gmail.com"/>		<a href="#">Save</a> <a href="#">Save &amp; New</a> <a href="#">Cancel</a>		<p>New Maintenance Request</p> <p><a href="#">Maintenance Request Edit</a> <a href="#">Save</a> <a href="#">Save &amp; New</a> <a href="#">Cancel</a></p> <p>Error: Invalid Data. Review all error messages below to correct your data.</p> <table border="1"> <tr> <td><b>Information</b></td> <td>Required Information</td> </tr> <tr> <td>Maintenance Request Name: <input type="text" value="Test1"/></td> <td></td> </tr> <tr> <td>Asset: <input type="text" value="Projector"/> </td> <td></td> </tr> <tr> <td>Description: <input type="text" value="This is test."/></td> <td></td> </tr> <tr> <td>Request Date: <input type="text" value="26/5/2025"/> [ 26/5/2025 ]</td> <td></td> </tr> <tr> <td>Status: <input type="text" value="New"/> </td> <td></td> </tr> <tr> <td>Technician: <input type="text" value=""/> </td> <td></td> </tr> <tr> <td>Technician Email: <input type="text" value="Error: If either the Technician or Technician Email is filled in, both fields must be completed."/> </td> <td>Error: If either the Technician or Technician Email is filled in, both fields must be completed.</td> </tr> <tr> <td>Requester Name: <input type="text" value="Yein Jeong"/></td> <td></td> </tr> <tr> <td>Requester Email: <input type="text" value="bella060131@gmail.com"/></td> <td></td> </tr> <tr> <td colspan="2"><a href="#">Save</a> <a href="#">Save &amp; New</a> <a href="#">Cancel</a></td> </tr> </table>	<b>Information</b>	Required Information	Maintenance Request Name: <input type="text" value="Test1"/>		Asset: <input type="text" value="Projector"/> 		Description: <input type="text" value="This is test."/>		Request Date: <input type="text" value="26/5/2025"/> [ 26/5/2025 ]		Status: <input type="text" value="New"/> 		Technician: <input type="text" value=""/> 		Technician Email: <input type="text" value="Error: If either the Technician or Technician Email is filled in, both fields must be completed."/> 	Error: If either the Technician or Technician Email is filled in, both fields must be completed.	Requester Name: <input type="text" value="Yein Jeong"/>		Requester Email: <input type="text" value="bella060131@gmail.com"/>		<a href="#">Save</a> <a href="#">Save &amp; New</a> <a href="#">Cancel</a>	
<b>Information</b>	Required Information																																												
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Technician: <input type="text" value=""/> 																																													
Technician Email: <input type="text" value="Error: If either the Technician or Technician Email is filled in, both fields must be completed."/> 	Error: If either the Technician or Technician Email is filled in, both fields must be completed.																																												
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<a href="#">Save</a> <a href="#">Save &amp; New</a> <a href="#">Cancel</a>																																													

## Validation Rule 4: Technician\_Required\_For\_Status

# Maintenance Request Validation Rule

Help for this Page 

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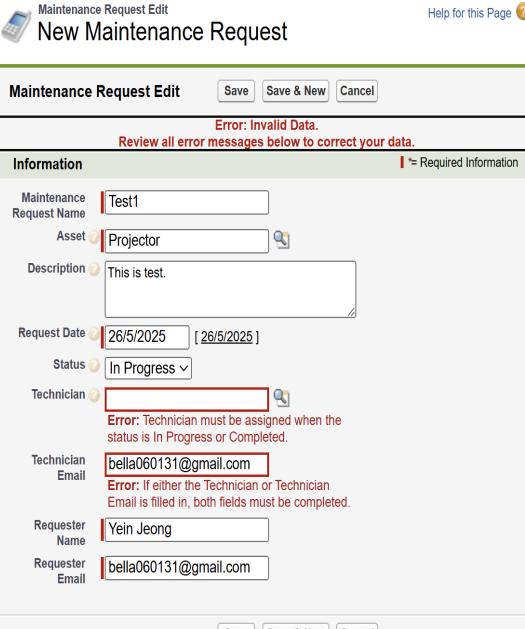
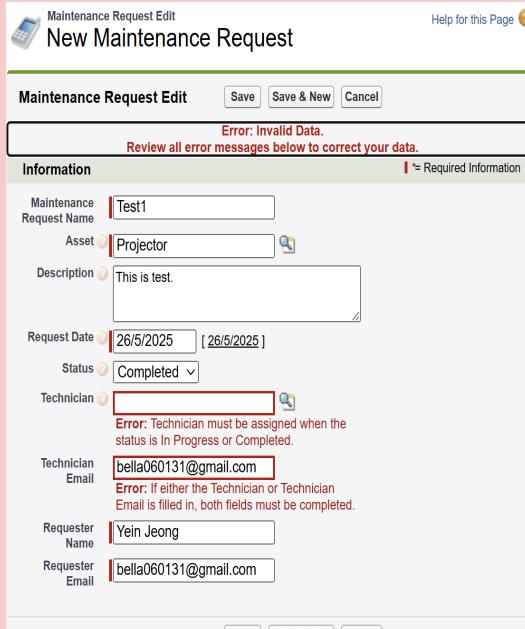
### Validation Rule Detail

[Edit](#) [Clone](#)

Rule Name	Technician_Required_For_Status Active	<input checked="" type="checkbox"/>
Error Condition Formula	AND( OR( ISPICKVAL(Status__c, "In Progress"), ISPICKVAL(Status__c, "Completed")) , ISBLANK(Technician__c) )	
Error Message	Technician must be assigned when the status is In Progress or Completed.	Error Location Technician
Description	Technician must be assigned when the status is In Progress or Completed.	
Created By	<a href="#">Yein Jeong</a> , 4/5/2025, 12:42 pm	Modified By <a href="#">Yein Jeong</a> , 11/5/2025, 4:25 pm

[Edit](#) [Clone](#)

### ❖ Trigger Test Result (Validation Rule 4)

 <p>Maintenance Request Edit New Maintenance Request</p> <p>Help for this Page </p> <p><b>Maintenance Request Edit</b> <a href="#">Save</a> <a href="#">Save &amp; New</a> <a href="#">Cancel</a></p> <p>Error: Invalid Data. Review all error messages below to correct your data.</p> <table border="1"> <tr> <td><b>Information</b></td> <td></td> </tr> <tr> <td>Maintenance Request Name <input type="text" value="Test1"/></td> <td></td> </tr> <tr> <td>Asset <input type="text" value="Projector"/> </td> <td></td> </tr> <tr> <td>Description <input type="text" value="This is test."/></td> <td></td> </tr> <tr> <td>Request Date <input type="text" value="26/5/2025"/> <input type="text" value="26/5/2025"/></td> <td></td> </tr> <tr> <td>Status <input type="text" value="In Progress"/></td> <td></td> </tr> <tr> <td>Technician <input type="text"/></td> <td> Error: Technician must be assigned when the status is In Progress or Completed.</td> </tr> <tr> <td>Technician Email <input type="text" value="bella060131@gmail.com"/></td> <td> Error: If either the Technician or Technician Email is filled in, both fields must be completed.</td> </tr> <tr> <td>Requester Name <input type="text" value="Yein Jeong"/></td> <td></td> </tr> <tr> <td>Requester Email <input type="text" value="bella060131@gmail.com"/></td> <td></td> </tr> </table> <p><a href="#">Save</a> <a href="#">Save &amp; New</a> <a href="#">Cancel</a></p>	<b>Information</b>		Maintenance Request Name <input type="text" value="Test1"/>		Asset <input type="text" value="Projector"/> 		Description <input type="text" value="This is test."/>		Request Date <input type="text" value="26/5/2025"/> <input type="text" value="26/5/2025"/>		Status <input type="text" value="In Progress"/>		Technician <input type="text"/>	 Error: Technician must be assigned when the status is In Progress or Completed.	Technician Email <input type="text" value="bella060131@gmail.com"/>	 Error: If either the Technician or Technician Email is filled in, both fields must be completed.	Requester Name <input type="text" value="Yein Jeong"/>		Requester Email <input type="text" value="bella060131@gmail.com"/>		 <p>Maintenance Request Edit New Maintenance Request</p> <p>Help for this Page </p> <p><b>Maintenance Request Edit</b> <a href="#">Save</a> <a href="#">Save &amp; New</a> <a href="#">Cancel</a></p> <p>Error: Invalid Data. Review all error messages below to correct your data.</p> <table border="1"> <tr> <td><b>Information</b></td> <td></td> </tr> <tr> <td>Maintenance Request Name <input type="text" value="Test1"/></td> <td></td> </tr> <tr> <td>Asset <input type="text" value="Projector"/> </td> <td></td> </tr> <tr> <td>Description <input type="text" value="This is test."/></td> <td></td> </tr> <tr> <td>Request Date <input type="text" value="26/5/2025"/> <input type="text" value="26/5/2025"/></td> <td></td> </tr> <tr> <td>Status <input type="text" value="Completed"/></td> <td></td> </tr> <tr> <td>Technician <input type="text"/></td> <td> Error: Technician must be assigned when the status is In Progress or Completed.</td> </tr> <tr> <td>Technician Email <input type="text" value="bella060131@gmail.com"/></td> <td> Error: If either the Technician or Technician Email is filled in, both fields must be completed.</td> </tr> <tr> <td>Requester Name <input type="text" value="Yein Jeong"/></td> <td></td> </tr> <tr> <td>Requester Email <input type="text" value="bella060131@gmail.com"/></td> <td></td> </tr> </table> <p><a href="#">Save</a> <a href="#">Save &amp; New</a> <a href="#">Cancel</a></p>	<b>Information</b>		Maintenance Request Name <input type="text" value="Test1"/>		Asset <input type="text" value="Projector"/> 		Description <input type="text" value="This is test."/>		Request Date <input type="text" value="26/5/2025"/> <input type="text" value="26/5/2025"/>		Status <input type="text" value="Completed"/>		Technician <input type="text"/>	 Error: Technician must be assigned when the status is In Progress or Completed.	Technician Email <input type="text" value="bella060131@gmail.com"/>	 Error: If either the Technician or Technician Email is filled in, both fields must be completed.	Requester Name <input type="text" value="Yein Jeong"/>		Requester Email <input type="text" value="bella060131@gmail.com"/>	
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## Profiles (& Tab, Object-Level Security)

### Profiles Overview

Action	Profile Name	User License	Custom
<a href="#">Edit   Del...</a>	<a href="#">Maintenance Requester</a>	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit   Del...</a>	<a href="#">Maintenance Supervisor</a>	Salesforce	<input checked="" type="checkbox"/>
Action	Profile Name	User License	Custom
<a href="#">Edit   Del...</a>	<a href="#">Technician</a>	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit   Del...</a>	<a href="#">Technician Supervisor</a>	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit   Del...</a>	<a href="#">System Administrator</a>	Salesforce	<input checked="" type="checkbox"/>

### Profile 1: Maintenance Requester

Profile Detail		<a href="#">Edit</a> <a href="#">Clone</a> <a href="#">Delete</a> <a href="#">View Users</a>	
Name	Maintenance Requester		
User License	Salesforce	Custom Profile	<input checked="" type="checkbox"/>
Description	This profile is assigned to general users who create maintenance requests. They have limited access to assets and technicians for reference purposes only.		
Created By	Yein Jeong, 11/5/2025, 1:54 am	Modified By	Yein Jeong, 11/5/2025, 3:11 am
Custom App Settings			
	Visible	Default	Visible
All Tabs (standard__AllTabSet)	<input type="checkbox"/>	<input type="checkbox"/>	My Service Journey (standard__MSJApp) <input type="checkbox"/>
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="checkbox"/>	Queue Management (standard__QueueManagement) <input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="checkbox"/>	Sales (standard__LightningSales) <input type="checkbox"/>
Approvals (standard__Approvals)	<input type="checkbox"/>	<input type="checkbox"/>	Sales (standard__Sales) <input type="checkbox"/>
Automation (standard__FlowsApp)	<input type="checkbox"/>	<input type="checkbox"/>	Sales Console (standard__LightningSalesConsole) <input type="checkbox"/>
Bolt Solutions (standard__LightningBolt)	<input type="checkbox"/>	<input type="checkbox"/>	Salesforce Chatter (standard__Chatter) <input type="checkbox"/>
Community (standard__Community)	<input type="checkbox"/>	<input type="checkbox"/>	Salesforce Scheduler Setup (standard__LightningScheduler) <input type="checkbox"/>
Content (standard__Content)	<input type="checkbox"/>	<input type="checkbox"/>	Sample Console (standard__ServiceConsole) <input type="checkbox"/>
Data Cloud (standard__Audience360)	<input type="checkbox"/>	<input type="checkbox"/>	Service (standard__Service) <input type="checkbox"/>
Data Manager (standard__DataManager)	<input type="checkbox"/>	<input type="checkbox"/>	Service Console (standard__LightningService) <input type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input type="checkbox"/>	<input type="checkbox"/>	Site.com (standard__Sites) <input type="checkbox"/>
Equipment Maintenance Tracker (Equipment_Maintenance_Tracker)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Subscription Management (standard__RevenueCloudConsole) <input type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input type="checkbox"/>	<input type="checkbox"/>	WDC (standard__Work) <input type="checkbox"/>
Marketing CRM Classic (standard__Marketing)	<input type="checkbox"/>	<input type="checkbox"/>	

### Object-Level Security

#### Custom Object Permissions

	Basic Access				Data Administration			Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Assets	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>					
Maintenance Requests	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>										

### Tab-Level Security

### Custom Tab Settings

Assets	Tab Hidden	Technicians	Default On
Maintenance Requests	Default On		

### ➤ Tab-Level Security Test Result

The screenshot shows the Salesforce Home page with the 'Maintenance Requests' tab selected. At the top, there are links for 'Edit | Login' and the user's email ('mjeon...'). To the right, a checkmark indicates 'Maintenance Requester'. The main area shows a user profile for 'M.S. Jeong' (Joined May 26, 2025), a 'Hide Feed' button, and a 'Post' section. Below the feed is a 'Share' button and a 'Recommendations' sidebar. The sidebar lists several users who joined in the last month, each with a 'Follow' button.

### Profile 2: Maintenance Supervisor

Profile Detail		<a href="#">Edit</a> <a href="#">Clone</a> <a href="#">Delete</a> <a href="#">View Users</a>	
Name	Maintenance Supervisor		
User License	Salesforce	Custom Profile <input checked="" type="checkbox"/>	
Description	This profile is assigned to supervisors who are responsible for reviewing maintenance requests and updating their status based on progress. They can mark requests as 'In Progress' or 'Completed' depending on the situation.		
Created By	<a href="#">Yein Jeong</a> , 11/5/2025, 2:12 am	Modified By	<a href="#">Yein Jeong</a> , 12/5/2025, 2:57 pm

### Custom App Settings

	Visible	Default	Visible	Default
All Tabs (standard__AllTabSet)	<input type="checkbox"/>	<input type="checkbox"/>	My Service Journey (standard__MSJApp)	<input type="checkbox"/>
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="checkbox"/>	Queue Management (standard__QueueManagement)	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="checkbox"/>	Sales (standard__LightningSales)	<input type="checkbox"/>
Approvals (standard__Approvals)	<input type="checkbox"/>	<input type="checkbox"/>	Sales (standard__Sales)	<input type="checkbox"/>
Automation (standard__FlowsApp)	<input type="checkbox"/>	<input type="checkbox"/>	Sales Console (standard__LightningSalesConsole)	<input type="checkbox"/>
Bolt Solutions (standard__LightningBolt)	<input type="checkbox"/>	<input type="checkbox"/>	Salesforce Chatter (standard__Chatter)	<input type="checkbox"/>
Community (standard__Community)	<input type="checkbox"/>	<input type="checkbox"/>	Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>
Content (standard__Content)	<input type="checkbox"/>	<input type="checkbox"/>	Sample Console (standard__ServiceConsole)	<input type="checkbox"/>
Data Cloud (standard__Audience360)	<input type="checkbox"/>	<input type="checkbox"/>	Service (standard__Service)	<input type="checkbox"/>
Data Manager (standard__DataManager)	<input type="checkbox"/>	<input type="checkbox"/>	Service Console (standard__LightningService)	<input type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input type="checkbox"/>	<input type="checkbox"/>	Site.com (standard__Sites)	<input type="checkbox"/>
Equipment Maintenance Tracker (Equipment_Maintenance_Tracker)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Subscription Management (standard__RevenueCloudConsole)	<input type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input type="checkbox"/>	<input type="checkbox"/>	WDC (standard__Work)	<input type="checkbox"/>
Marketing CRM Classic (standard__Marketing)	<input type="checkbox"/>	<input type="checkbox"/>		

### ❖ Object-Level Security

#### Custom Object Permissions

	Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Assets	✓	□	□	□	□	□	□
Maintenance Requests	✓	✓	✓	□	□	□	□

	Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Technicians	✓	□	□	□	□	□	□

## ❖ Tab-Level Security

#### Custom Tab Settings

Assets	Default On	Technicians	Default On
Maintenance Requests	Default On		

## ➤ Tab-Level Security Test Result

The screenshot shows the Salesforce interface for a user named M.S Jeong. The top navigation bar includes Home, Assets, Technicians, Maintenance Requests, and a plus sign. The Maintenance Requests tab is active. The main content area shows a feed for M.S Jeong, recent items (including a link to M.S Jeong), and a recycle bin. On the right, there is a sidebar with recommendations for other users like T Jeong, Yein Jeong, OrgFarm EPIC, and Security User, along with a 'Share' button.

## Profile 3: Technician

#### Profile Detail

		<a href="#">Edit</a>	<a href="#">Clone</a>	<a href="#">Delete</a>	<a href="#">View Users</a>
Name	Technician				
User License	Salesforce				Custom Profile <input checked="" type="checkbox"/>
Description	This profile is for technicians responsible for handling maintenance tasks. They can view assigned requests and related asset information.				
Created By	<a href="#">Yein Jeong</a> , 4/5/2025, 1:37 pm				Modified By <a href="#">Yein Jeong</a> , 11/5/2025, 3:12 am

#### Custom App Settings

	Visible	Default	Visible	Default
All Tabs (standard__AllTabSet)	□	□	My Service Journey (standard__MSJApp)	□
Analytics Studio (standard__Insights)	□	□	Queue Management (standard__QueueManagement)	□
App Launcher (standard__AppLauncher)	□	□	Sales (standard__LightningSales)	□
Approvals (standard__Approvals)	□	□	Sales (standard__Sales)	□
Automation (standard__FlowsApp)	□	□	Sales Console (standard__LightningSalesConsole)	□
Bolt Solutions (standard__LightningBolt)	□	□	Salesforce Chatter (standard__Chatter)	□
Community (standard__Community)	□	□	Salesforce Scheduler Setup (standard__LightningScheduler)	□
Content (standard__Content)	□	□	Sample Console (standard__ServiceConsole)	□
Data Cloud (standard__Audience360)	□	□	Service (standard__Service)	□
Data Manager (standard__DataManager)	□	□	Service Console (standard__LightningService)	□
Digital Experiences (standard__SalesforceCMS)	□	□	Site.com (standard__Sites)	□
Equipment Maintenance Tracker (Equipment_Maintenance_Tracker)	✓	✓	Subscription Management (standard__RevenueCloudConsole)	□
Lightning Usage App (standard__LightningInstrumentation)	□	□	WDC (standard__Work)	□
Marketing CRM Classic (standard__Marketing)	□	□		

## ❖ Object-Level Security

#### Custom Object Permissions

	Basic Access				Data Administration			Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Assets	<input checked="" type="checkbox"/>	<input type="checkbox"/>												
Maintenance Requests	<input checked="" type="checkbox"/>	<input type="checkbox"/>												

## ❖ Tab-Level Security

#### Custom Tab Settings

Assets	Default On	Technicians	Technicians	Tab Hidden
Maintenance Requests	Default On			

## ➤ Tab-Level Security Test Result

The screenshot shows the Salesforce Home tab interface. At the top, it displays the user's name (T Jeong) and email (yjeon\_bella060131@gmail.com). To the right, there are tabs for 'Technician' (selected) and 'Technician'. Below the tabs, the main content area shows the Home tab's interface with sections for 'Recent Items', 'Feed', and 'Recommendations'. The 'Feed' section shows a post from T Jeong with a timestamp of Monday May 26, 2025. The 'Recommendations' section lists several users who joined in the last month, each with a 'Follow' button.

## Profile 4: Technician Supervisor

#### Profile Detail

Name		Technician Supervisor	Edit	Clone	Delete	View Users
User License	Salesforce				Custom Profile	<input checked="" type="checkbox"/>
Description						This profile is designed for users responsible for supervising technicians. They are granted read access to all key objects and can verify whether assigned maintenance tasks have been properly completed. They do not modify maintenance requests themselves.
Created By	Yein Jeong	11/5/2025, 2:26 am			Modified By	Yein Jeong, 11/5/2025, 3:12 am

#### Custom App Settings

	Visible	Default		Visible	Default
All Tabs (standard__AllTabSet)	<input type="checkbox"/>	<input type="checkbox"/>	My Service Journey (standard__MSJApp)	<input type="checkbox"/>	<input type="checkbox"/>
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="checkbox"/>	Queue Management (standard__QueueManagement)	<input type="checkbox"/>	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="checkbox"/>	Sales (standard__LightningSales)	<input type="checkbox"/>	<input type="checkbox"/>
Approvals (standard__Approvals)	<input type="checkbox"/>	<input type="checkbox"/>	Sales (standard__Sales)	<input type="checkbox"/>	<input type="checkbox"/>
Automation (standard__FlowsApp)	<input type="checkbox"/>	<input type="checkbox"/>	Sales Console (standard__LightningSalesConsole)	<input type="checkbox"/>	<input type="checkbox"/>
Bolt Solutions (standard__LightningBolt)	<input type="checkbox"/>	<input type="checkbox"/>	Salesforce Chatter (standard__Chatter)	<input type="checkbox"/>	<input type="checkbox"/>
Community (standard__Community)	<input type="checkbox"/>	<input type="checkbox"/>	Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>	<input type="checkbox"/>
Content (standard__Content)	<input type="checkbox"/>	<input type="checkbox"/>	Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="checkbox"/>
Data Cloud (standard__Audience360)	<input type="checkbox"/>	<input type="checkbox"/>	Service (standard__Service)	<input type="checkbox"/>	<input type="checkbox"/>
Data Manager (standard__DataManager)	<input type="checkbox"/>	<input type="checkbox"/>	Service Console (standard__LightningService)	<input type="checkbox"/>	<input type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input type="checkbox"/>	<input type="checkbox"/>	Site.com (standard__Sites)	<input type="checkbox"/>	<input type="checkbox"/>
Equipment Maintenance Tracker (Equipment_Maintenance_Tracker)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Subscription Management (standard__RevenueCloudConsole)	<input type="checkbox"/>	<input type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input type="checkbox"/>	<input type="checkbox"/>	WDC (standard__Work)	<input type="checkbox"/>	<input type="checkbox"/>
Marketing CRM Classic (standard__Marketing)	<input type="checkbox"/>	<input type="checkbox"/>			

## ❖ Object-Level Security

#### Custom Object Permissions

	Basic Access				Data Administration			Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Assets	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>										
Maintenance Requests	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						

## ❖ Tab-Level Security

#### Custom Tab Settings

Assets	Default On	Technicians	Default On
Maintenance Requests	Default On		

## ➤ Tab-Level Security Test Result

The screenshot shows the Salesforce Lightning Experience interface. At the top, there's a navigation bar with Home, Assets, Technicians, Maintenance Requests, and a plus sign. Below the navigation is a sidebar with sections for Create New, Recent Items (listing T.Jeong), Recycle Bin, Messages and Alerts (with a note: "There are no updates."), and Custom Links. The main content area shows a post from "T Jeong" dated Monday May 26, 2025, and a "Share" button. To the right, there's a "Recommendations" section with a card for "Spring '25 for Developers" and a list of users who joined in the last month: M.S Jeong, Yelin Jeong, OrgFarm EPIC, and Security User, each with a "Follow" button.

## Profile 5: System Administrator

#### Profile Detail

	<a href="#">Edit</a>	<a href="#">Clone</a>	<a href="#">Delete</a>	<a href="#">View Users</a>
Name	System Administrator			
User License	Salesforce			Custom Profile <input checked="" type="checkbox"/>
Description	This profile has full access to all data and settings in the system. It is intended for managing the platform and user configurations.			
Created By	<a href="#">Yein Jeong</a> , 4/5/2025, 1:13 pm			Modified By <a href="#">Yein Jeong</a> , 11/5/2025, 2:07 am

#### Custom App Settings

	Visible	Default		Visible	Default
All Tabs (standard__AllTabSet)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	My Service Journey (standard__MSJApp)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sales (standard__LightningSales)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Approvals (standard__Approvals)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Automation (standard__FlowsApp)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sales Console (standard__LightningSalesConsole)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Bolt Solutions (standard__LightningBolt)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>	<input type="checkbox"/>
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="checkbox"/>
Data Cloud (standard__Audience360)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Service Console (standard__LightningService)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Site.com (standard__Sites)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Equipment Maintenance Tracker (Equipment_Maintenance_Tracker)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Subscription Management (standard__RevenueCloudConsole)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	WDC (standard__Work)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Marketing CRM Classic (standard__Marketing)	<input checked="" type="checkbox"/>	<input type="checkbox"/>			

## ❖ Object-Level Security

#### Custom Object Permissions

	Basic Access				Data Administration			
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields	
Assets	✓	✓	✓	✓	✓	✓	✓	
Maintenance Requests	✓	✓	✓	✓	✓	✓	✓	

Technicians

	Basic Access				Data Administration			
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields	
Technicians	✓	✓	✓	✓	✓	✓	✓	

## ❖ Tab-Level Security

#### Custom Tab Settings

Assets	Default On	Technicians	Default On
Maintenance Requests	Default On		

## ➤ Tab-Level Security Test Result

## Organisation-wide Default

Manage sharing settings for: Asset

#### Default Sharing Settings

##### Organization-Wide Defaults

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Asset	Public Read Only	Private	✓

Organization-Wide Defaults Help

Manage sharing settings for: Maintenance Request

#### Default Sharing Settings

##### Organization-Wide Defaults

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Maintenance Request	Controlled by Parent	Controlled by Parent	

Organization-Wide Defaults Help

Manage sharing settings for: Technician

#### Default Sharing Settings

##### Organization-Wide Defaults

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Technician	Public Read Only	Private	✓

Organization-Wide Defaults Help

# Roles

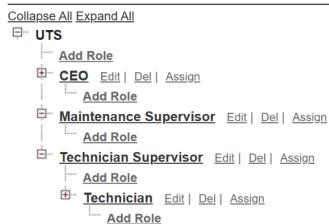
## Creating the Role Hierarchy

Help for this Page 

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

### Your Organization's Role Hierarchy

Show in tree view 



# Email Notification Workflows

## Email Workflows Overview

### All Workflow Rules

Help for this Page 

 Go with the flow! With Flow Builder, the future of low-code automation, you can do everything you do with workflow rules — and more! Salesforce plans to retire workflow rules and recommends building automation in Flow Builder. [Tell Me More](#) | [Migrate your workflow rules to flows](#)

Configure your organization's workflow by creating workflow rules. Each workflow rule consists of:

- Criteria that cause the workflow rule to run.
- Immediate actions that execute when a record matches the criteria. For example, Salesforce can automatically send an email that notifies the account team when a new high-value opportunity is created.
- Time-dependent actions that queue when a record matches the criteria, and execute according to time triggers. For example, Salesforce can automatically send an email reminder to the account team if a high-value opportunity is still open ten days before the close date.

### Quick Tips

- [Useful Sample Workflow Rule](#)
- [Video Tutorial \(English Only\)](#)
- [Troubleshooting Workflow](#)

View: [All Workflow Rules](#)  [Create New View](#)

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other [All](#)

Action	Rule Name 	Description	Object	Active
Edit   Del   Deactivate	<a href="#">Check Maintenance Completion</a>	This task is assigned to the Technician Supervisor to verify that the maintenance request has been completed appropriately by the assigned technician	Maintenance Request	
Edit   Del   Deactivate	<a href="#">Create Task for Maintenance Supervisor</a>	Assign a task to the Maintenance Supervisor to update the status of the maintenance request to either 'In Progress' or 'Completed'.	Maintenance Request	
Edit   Deactivate	<a href="#">New_Status_Delay_Alert</a>		Maintenance Request	
Edit   Del   Deactivate	<a href="#">Notify_Technician_On_Create</a>	Sends an email notification to the assigned technician only when a new maintenance request is created and the technician field is not blank.	Maintenance Request	
Edit   Del   Deactivate	<a href="#">Send_Email_When_Completed</a>		Maintenance Request	

## Email Workflow 1: Notify\_Technician\_On\_Create

Workflow Rule  
**Notify\_Technician\_On\_Create** Help for this Page 

« Back to List: Workflow Rules

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**Workflow Rule Detail**

Workflow Rule Detail		<a href="#">Edit</a>	<a href="#">Clone</a>	<a href="#">Deactivate</a>
Rule Name	Notify_Technician_On_Create	Object	Maintenance Request	
Active	<input checked="" type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created	
Description	Sends an email notification to the assigned technician only when a new maintenance request is created and the technician field is not blank.			
Rule Criteria	NOT(ISBLANK(Technician__c))			
Created By	Yein Jeong, 4/5/2025, 3:35 pm	Modified By	Yein Jeong, 12/5/2025, 3:27 pm	

**Workflow Actions** [Edit](#)

**Immediate Workflow Actions**

Type	Description
Email Alert	Email_Technician_New_Request

**Time-Dependent Workflow Actions** [See an example](#)

! You cannot add new time triggers to an active rule. [Deactivate This Rule](#)

### ❖ Workflow Action (Email)

Email Alert  
**Email\_Technician\_New\_Request** Printable View | Help for this Page 

« Back to List: Workflow Rules

[Rules Using This Email Alert \[1\]](#) | [Approval Processes Using This Email Alert \[0\]](#) | [Entitlement Processes Using This Email Alert \[0\]](#)

**Email Alert Detail**

Email Alert Detail		<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Clone</a>
Description	Email_Technician_New_Request	Email Template	New_Request_Alert	
Unique Name	Email_Technician_New_Request	Object	Maintenance Request	
From Email Address	Current User's email address			
Recipients	Email Field: Technician Email			
Additional Emails				
Created By	Yein Jeong, 4/5/2025, 4:54 pm	Modified By	Yein Jeong, 4/5/2025, 4:54 pm	

**Rules Using This Email Alert** [Rules Using This Email Alert Help \[?\]](#)

Action	Rule Name	Description	Object	Active
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Notify_Technician_On_Create	Sends an email notification to the assigned technician only when a new maintenance request is created and the technician field is not blank.	Maintenance Request	<input checked="" type="checkbox"/>

### ❖ Email Template

Text Email Template  
**New\_Request\_Alert**

[« Back to List: Workflow Rules](#)

Preview your email template below.

Email Template Detail	
Email Templates from Salesforce	Unfiled Public Classic Email Templates
Email Template Name	New_Request_Alert
Template Unique Name	New_Request_Alert
Encoding	Unicode (UTF-8)
Author	<a href="#">Yein Jeong [Change]</a>
Description	
Created By	<a href="#">Yein Jeong, 4/5/2025, 3:16 pm</a>
Modified By	<a href="#">Yein Jeong, 4/5/2025, 3:16 pm</a>
<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Clone</a>	

Email Template	<a href="#">Send Test and Verify Merge Fields</a>
<p><b>Subject</b>   New Maintenance Request Assigned</p> <p><b>Plain Text Preview</b></p> <p>A new maintenance request has been assigned to you. Request Description: {!Maintenance_Request__c.Description__c} Request Date: {!Maintenance_Request__c.Request_Date__c}</p>	

## Email Workflow 2: Send\_Email\_When\_Completed

Workflow Rule  
**Send\_Email\_When\_Completed**

[« Back to List: Workflow Rules](#)

[Help for this Page](#)

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Workflow Rule Detail	
Rule Name	<a href="#">Send_Email_When_Completed</a>
Active	<input checked="" type="checkbox"/>
Description	Maintenance Request: Status EQUALS Completed
Rule Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Created By	<a href="#">Yein Jeong, 4/5/2025, 4:58 pm</a>
Modified By	<a href="#">Yein Jeong, 9/5/2025, 3:03 am</a>
<a href="#">Edit</a> <a href="#">Clone</a> <a href="#">Deactivate</a>	

Workflow Actions	
<b>Immediate Workflow Actions</b>	
Type	Description
Email Alert	Completed_Notification_Email
<b>Time-Dependent Workflow Actions</b> <a href="#">See an example</a>	
You cannot add new time triggers to an active rule. <a href="#">Deactivate This Rule</a>	
<a href="#">Edit</a>	

### ❖ Workflow Action (Email)

Email Alert  
**Completed\_Notification\_Email**

« Back to List: Workflow Rules

Printable View | Help for this Page 

[Rules Using This Email Alert \[1\]](#) | [Approval Processes Using This Email Alert \[0\]](#) | [Entitlement Processes Using This Email Alert \[0\]](#)

**Email Alert Detail**

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

Email Template **Completed\_Notification**  
Object Maintenance Request

Description Completed\_Notification\_Email  
Unique Name Completed\_Notification\_Email  
From Email Address Current User's email address  
Recipients Email Field: Requester Email  
Additional Emails  
Created By [Yein Jeong](#), 4/5/2025, 4:59 pm

Modified By [Yein Jeong](#), 4/5/2025, 4:59 pm

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

**Rules Using This Email Alert**

[Rules Using This Email Alert Help](#) 

Action	Rule Name	Description	Object	Active
<a href="#">Edit</a> <a href="#">Del</a> <a href="#">Deactivate</a>	<a href="#">Send_Email_When_Completed</a>		Maintenance Request	<input checked="" type="checkbox"/>

## ❖ Email Template

Text Email Template

### Completed\_Notification

« Back to List: Workflow Rules

Preview your email template below.

**Email Template Detail**

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

Available For Use

Email Templates from Salesforce Unfiled Public Classic Email Templates  
Email Template Name Completed\_Notification  
Template Unique Name Completed\_Notification  
Encoding Unicode (UTF-8)  
Author [Yein Jeong](#) [Change]  
Description  
Created By [Yein Jeong](#), 4/5/2025, 4:57 pm  
Modified By [Yein Jeong](#), 4/5/2025, 4:57 pm

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

**Email Template**

[Send Test and Verify Merge Fields](#)

**Subject** | Your maintenance request has been completed

**Plain Text Preview** |

Hello,

Your maintenance request has been successfully completed.  
Please find the details below:

- Request Date: {!Maintenance\_Request\_\_c.Request\_Date\_\_c}
- Asset: {!Maintenance\_Request\_\_c.Asset\_\_r.Name}

Thank you for using our service.

Best regards,  
Maintenance Team

## Task auto-generated Workflows

### Task Workflow 1: Check Maintenance Completion

Workflow Rule  
Check Maintenance Completion Help for this Page 

« Back to List: Workflow Rules

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Workflow Rule Detail		<a href="#">Edit</a> <a href="#">Clone</a> <a href="#">Deactivate</a>	
Rule Name	Check Maintenance Completion	Object	Maintenance Request
Active	<input checked="" type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created
Description	This task is assigned to the Technician Supervisor to verify that the maintenance request has been completed appropriately by the assigned technician		
Rule Criteria	Maintenance Request: Status NOTEQUAL TO Completed		
Created By	Yein Jeong, 8/5/2025, 9:44 pm	Modified By	Yein Jeong, 8/5/2025, 9:47 pm

**Workflow Actions** [Edit](#)

**Immediate Workflow Actions**

Type	Description
Task	<a href="#">Check Maintenance Completion</a>

#### ❖ Workflow Action (Task)

Task  
Check Maintenance Completion Printable View | Help for this Page 

« Back to List: Workflow Rules

[Rules Using This Task](#) | [Approval Processes Using This Task](#) | [Entitlement Processes Using This Task](#)

Workflow Task Detail		<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Clone</a>	
Object	Maintenance Request	Status	Not Started
Assigned To	<a href="#">Role: Technician Supervisor</a>	Priority	Normal
Subject	Check Maintenance Completion		
Unique Name	Check_Maintenance_Completion		
Due Date	Rule Trigger Date + 10 days		
Comments	Confirm that the assigned technician has successfully completed the maintenance task and take further action if required.		
Created By	Yein Jeong, 8/5/2025, 9:46 pm	Modified By	Yein Jeong, 8/5/2025, 9:46 pm

**Rules Using This Task** [Rules Using This Task Help](#) 

Action	Rule Name	Description	Object	Active
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	<a href="#">Check Maintenance Completion</a>	This task is assigned to the Technician Supervisor to verify that the maintenance request has been completed appropriately by the assigned technician	Maintenance Request	<input checked="" type="checkbox"/>

### Task Workflow 2: Create Task for Maintenance Supervisor

Workflow Rule  
Create Task for Maintenance Supervisor Help for this Page 

« Back to List: Workflow Rules

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Workflow Rule Detail		<a href="#">Edit</a> <a href="#">Clone</a> <a href="#">Deactivate</a>	
Rule Name	Create Task for Maintenance Supervisor	Object	Maintenance Request
Active	<input checked="" type="checkbox"/>	Evaluation Criteria	Evaluate the rule when a record is created
Description	Assign a task to the Maintenance Supervisor to update the status of the maintenance request to either 'In Progress' or 'Completed'.		
Rule Criteria	TRUE		
Created By	Yein Jeong, 11/5/2025, 2:52 am	Modified By	Yein Jeong, 12/5/2025, 12:40 pm

**Workflow Actions** [Edit](#)

**Immediate Workflow Actions**

Type	Description
Task	<a href="#">Update Maintenance Request Status</a>

## ❖ Workflow Action (Task)

Task  
Update Maintenance Request Status

« Back to List: Workflow Rules

Rules Using This Task [1] | Approval Processes Using This Task [0] | Entitlement Processes Using This Task [0]

Workflow Task Detail		Edit	Delete	Clone
Object	Maintenance Request	Status	Not Started	
Assigned To	Role: Maintenance Supervisor	Priority	High	
Subject	Update Maintenance Request Status			
Unique Name	Update_Maintenance_Request_Status			
Due Date	Maintenance Request: Created Date + 10 days			
Comments	Please verify whether the assigned technician has completed the maintenance task. Then, update the status of the maintenance request to either 'In Progress' or 'Completed' accordingly.			
Created By	Yein Jeong, 11/5/2025, 2:53 am	Modified By	Yein Jeong, 12/5/2025, 1:09 pm	
		Edit	Delete	Clone

Rules Using This Task

Action	Rule Name	Description	Object	Active
Edit   Del   Deactivate	Create Task for Maintenance Supervisor	Assign a task to the Maintenance Supervisor to update the status of the maintenance request to either 'In Progress' or 'Completed'.	Maintenance Request	<input checked="" type="checkbox"/>

## Time-based Workflow

### Time-based Workflow: New\_Status\_Delay\_Alert

Workflow Rule  
New\_Status\_Delay\_Alert

« Back to List: Workflow Rules

Help for this Page ?

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Workflow Rule Detail		Edit	Clone	Deactivate
Rule Name	New_Status_Delay_Alert			
Active	✓			
Object	Maintenance Request			
Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria			
Description				
Rule Criteria	ISPICKVAL(Status__c, "New")			
Created By	Yein Jeong, 4/5/2025, 5:23 pm	Modified By	Yein Jeong, 8/5/2025, 9:26 pm	

Workflow Actions

Immediate Workflow Actions

No workflow actions have been added.

Time-Dependent Workflow Actions [See an example](#)

Type	Description
Email Alert	Send Delayed Email to Technician

## ❖ Time-Dependent Workflow Actions (Email)

## Email Alert Send Delayed Email to Technician

[Printable View](#) | [Help for this Page](#)

[« Back to List: Workflow Rules](#)

[Rules Using This Email Alert \[1\]](#) | [Approval Processes Using This Email Alert \[0\]](#) | [Entitlement Processes Using This Email Alert \[0\]](#)

### Email Alert Detail

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

Email Template **Delayed\_Alert**  
Object Maintenance Request

Description	Send Delayed Email to Technician
Unique Name	Send_Delayed_Email_to_Technician2
From Email Address	Current User's email address
Recipients	Email Field: Technician Email
Additional Emails	
Created By	Yein Jeong, 12/5/2025, 4:16 pm
Modified By	Yein Jeong, 12/5/2025, 4:16 pm

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

### Rules Using This Email Alert

[Rules Using This Email Alert Help](#)

Action	Rule Name	Description	Object	Active
<a href="#">Edit</a>   <a href="#">Deactivate</a>	New_Status_Delay_Alert		Maintenance Request	<input checked="" type="checkbox"/>

## ❖ Email Template

Text Email Template

**Delayed\_Alert**

[« Back to List: Workflow Rules](#)

Preview your email template below.

### Email Template Detail

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

Email Templates from Salesforce	Unified Public Classic Email Templates
Email Template Name	Delayed_Alert
Template Unique Name	Delayed_Alert
Encoding	Unicode (UTF-8)
Author	Yein Jeong [Change]
Description	
Created By	Yein Jeong, 4/5/2025, 5:22 pm
Modified By	Yein Jeong, 12/5/2025, 1:04 pm

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

### Email Template

[Send Test and Verify Merge Fields](#)

Subject : Maintenance Request Delayed

Plain Text Preview :

Hello,  
This is a reminder that a maintenance request is still marked as "New" after 3 days.  
Please proceed with the assigned maintenance task immediately to ensure timely asset management.  
Regards,  
Maintenance System

## Project Summary

This project is an **Equipment Maintenance Tracker** application based on Force.com platform. Focusing on Asset, Maintenance Request, and Technician objects, I configured various relationship settings (Master-Detail, Lookup), Validation Rule, Security settings, and Workflows. By designation and implementation, I confirm that workflow automation is actually being worked on based on five workflows and data integrity. This document is the result of organising the application structure and the implementation process.