

WhatsNext Vision Motors Salesforce CRM Implementation

Phase 6

Data Management – Fields & Relationships

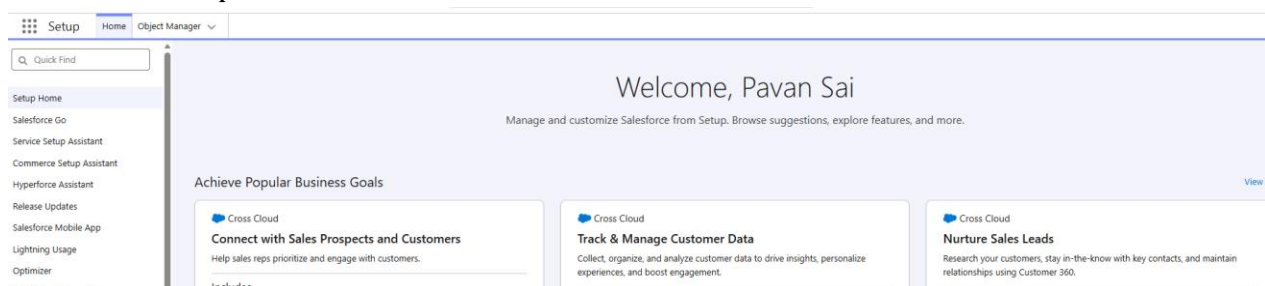
1. Phase Overview

Phase 6 focuses on creating fields and relationships for custom objects. These fields help capture detailed information and establish connections between objects.

2. Creating Fields in Vehicle Object

Steps to create a field:

1. Go to Setup



2. Click on Object Manager

3. Search and select Vehicle object

4. Click on Fields & Relationships

5. Click New

SETUP > OBJECT MANAGER				
Vehicle				
Details	Fields & Relationships 9 Items, Sorted by Field Label			
Fields & Relationships				
Page Layouts				
Lightning Record Pages				
Buttons, Links, and Actions				
Compact Layouts				
Field Sets				
Object Limits				
	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)	✓
	Price	Price_c	Currency(18, 0)	
	Status	Status_c	Picklist	

Creating Vehicle Model Field:

- Select Data Type as Picklist
- Click Next
- Field Label: Vehicle Model
- Enter Picklist values (Sedan, SUV, EV, etc.)

- Click Next → Next → Save & New

Creating Stock Quantity Field:

- Select Data Type as Number
- Click Next
- Field Label: Stock Quantity
- Click Next → Next → Save & New

Creating Lookup Relationship to Dealer:

- Select Data Type as Lookup Relationship
- Click Next
- Select Dealer Object
- Click Next and Save

3. Key Fields for Each Object

Vehicle__c

- Vehicle_Name__c (Text)
- Vehicle_Model__c (Picklist)

The screenshot shows the 'Custom Field Definition Edit' window for the 'Vehicle_Model__c' field. The 'Field Information' tab is active. The 'Field Label' is 'Vehicle Model' and the 'Field Name' is 'Vehicle_Model'. The 'Data Type' is set to 'Picklist'. The 'Data Owner' is 'User'. The 'Field Usage' is '--None--'. The 'Data Sensitivity Level' is '--None--'. The 'Compliance Categorization' section shows a list of categories: PII, HIPAA, GDPR, and PCI. The 'Available' list contains PII, HIPAA, GDPR, and PCI. The 'Chosen' list is empty. There are buttons for 'Change Field Type', 'Promote to Global Value Set', 'Save', and 'Cancel' at the top right.

- Stock_Quantity__c (Number)
- Price__c (Currency)
- Dealer__c (Lookup to Dealer)
- Status__c (Picklist)

Vehicle_Dealer__c

- Dealer_Name__c (Text)
- Dealer_Location__c (Text)
- Dealer_Code__c (Auto Number)
- Phone__c (Phone)
- Email__c (Email)

Vehicle_Order__c

- Customer__c (Lookup to Customer)
- Vehicle__c (Lookup to Vehicle)
- Order_Date__c (Date)
- Status__c (Picklist)

Vehicle_Customer__c

- Customer_Name__c (Text)
- Email__c (Email)
- Phone__c (Phone)
- Address__c (Text)
- Preferred_Vehicle_Type__c (Picklist)

Vehicle_Test_Drive__c

- Customer__c (Lookup to Customer)
- Vehicle__c (Lookup to Vehicle)
- Test_Drive_Date__c (Date)

Field Information

Field Label	Test Drive Date	Data Type	Date
Field Name	Test_Drive_Date		
Description			
Help Text			
Data Owner	User		
Field Usage	--None--		
Data Sensitivity Level	--None--		
Compliance Categorization	<div> <div>Available</div> <div> PII HIPAA GDPR PCI </div> <div>Chosen</div> </div>		

- Status__c (Picklist)

Vehicle_Service_Request__c

- Customer__c (Lookup to Customer)
- Vehicle__c (Lookup to Vehicle)
- Service_Date__c (Date)
- Issue_Description__c (Text)
- Status__c (Picklist)