

WhatsNext Vision Motors

Salesforce CRM Implementation

Phase 6

Data Management – Fields & Relationships

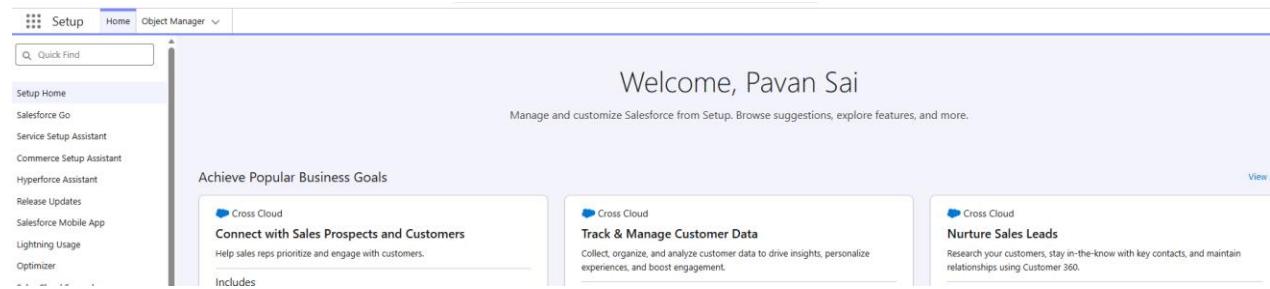
1. Phase Overview

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			
Fields & Relationships	9 Items, Sorted by Field Label			
Page Layouts	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Lightning Record Pages	Created By	CreatedById	Lookup(User)	
Buttons, Links, and Actions	Last Modified By	LastModifiedById	Lookup(User)	
Compact Layouts	Owner	OwnerId	Lookup(User,Group)	✓
Field Sets	Price	Price__c	Currency(18, 0)	
Object Limits	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)

Custom Field Definition Edit

Field Information

	Data Type	Picklist
Field Label	Vehicle Model	
Field Name	Vehicle_Model	
Description		
Help Text		
Data Owner	User	
Field Usage	--None--	
Data Sensitivity Level	--None--	
Compliance Categorization	Available: PII, HIPAA, GDPR, PCI Chosen:	

- 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

	Data Type	Date
Field Label	<input type="text" value="Test Drive Date"/>	
Field Name	<input type="text" value="Test_Drive_Date"/>	
Description	<input type="text"/>	
Help Text	<input type="text"/>	
Data Owner	User	<input type="button" value=""/>
Field Usage	--None--	
Data Sensitivity Level	--None--	
Compliance Categorization	Available: PII, HIPAA, GDPR, PCI Chosen:	

- 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)