

Garage Management system

A Garage Management System is a software solution designed to streamline the operations of automotive service centers and garages. It helps in managing various aspects of the business, including vehicle service records, customer information, inventory, and billing. The system allows for scheduling appointments, tracking repairs, managing spare parts, and generating invoices. It often includes features like real-time status updates, maintenance reminders, and reporting tools for business insights. Additionally, it can integrate with other systems for payments and customer communication. Overall, it enhances efficiency, reduces manual errors, and improves customer satisfaction in garage management operations.

Salesforce

Salesforce is a comprehensive customer success platform designed to help businesses manage sales, service, marketing, analytics, and customer connections all in one place. It allows you to efficiently handle customer relationships, collaborate with employees, and securely store data in the cloud. Before Salesforce, businesses often managed contacts, emails, tasks, and deals in disorganized ways, using separate spreadsheets, calendars, and email threads. Salesforce centralizes all this information, making it easily accessible and organized. This integration improves customer engagement, streamlines operations, and helps businesses grow by providing real-time insights and automation tools for better decision-making.

Object

In Salesforce, objects are database tables that allow you to store data specific to your organization. There are two types of objects: **Standard Objects** and **Custom Objects**. Standard objects are pre-built by Salesforce, such as Users, Contracts, Reports, and Dashboards. Custom objects are created by users to store data that is unique to their organization, forming the core of custom applications and enabling efficient data sharing. To create a custom object, navigate to the **Setup** page by clicking the gear icon, then select **Object Manager**, click **Create**, and choose **Custom Object**. This process allows you to tailor Salesforce to your specific business needs.

Create Customer Details Object

To create a custom object in Salesforce, navigate to the **Setup** page and click on **Object Manager**. From there, select **Create** and choose **Custom Object**. Enter the **Label Name** as "Customer Details" and the **Plural Label Name** as "Customer Details". For the **Record Name**, enter "Customer Name" and set the **Data Type** to **Text**. Enable the options to **Allow Reports** and **Track Field History**. Also, check the **Allow Search** option to make the object searchable. Finally, click **Save** to create the custom object. This process helps tailor Salesforce to manage specific business data.

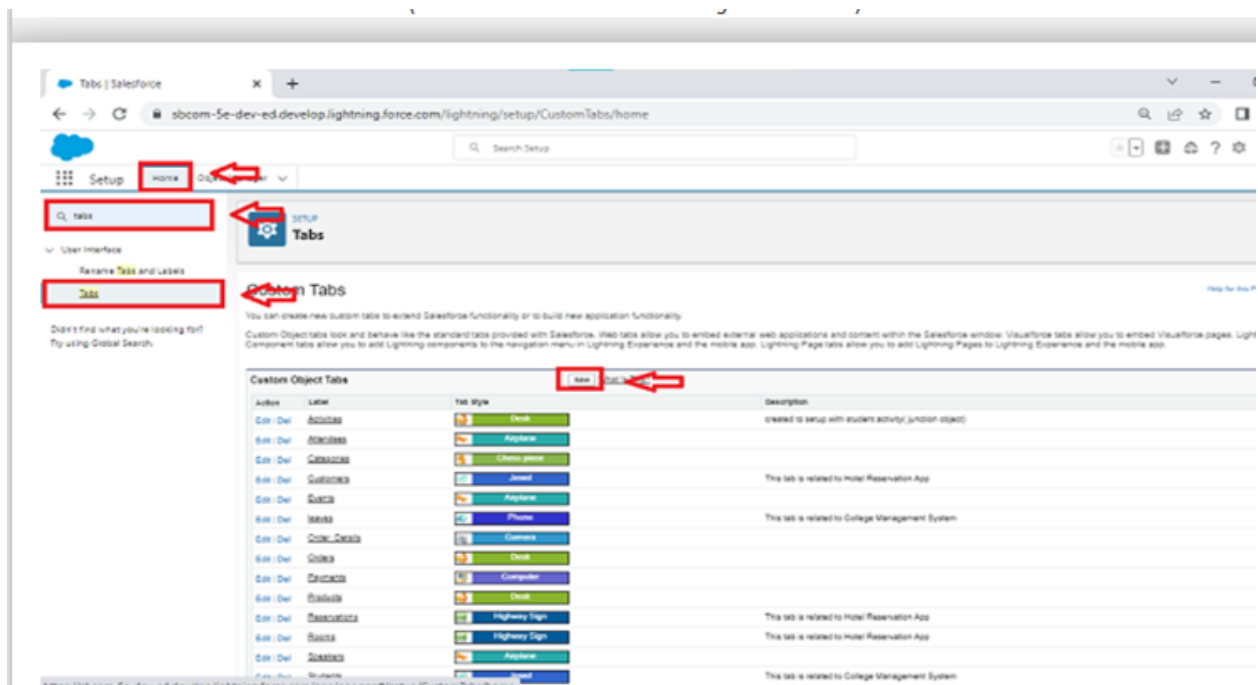
Tabs

In Salesforce, a **tab** is a user interface component used to create and view records for objects. There are several types of tabs:

1. **Custom Tabs**: These display custom objects you build, behaving like standard Salesforce tabs such as Accounts and Contacts.
2. **Web Tabs**: These display web content or applications within Salesforce, allowing quick access to external resources without leaving the platform.
3. **Visualforce Tabs**: These show Visualforce pages and function like standard tabs, enabling customized views and functionality.
4. **Lightning Component Tabs**: These add Lightning components to the navigation in Lightning Experience and the Salesforce mobile app.
5. **Lightning Page Tabs**: These let you add Lightning Pages to the mobile app navigation, though they don't appear in the All Tabs page or available tabs list for app customization.

Creating a Custom Tab

To create a tab for the **Customer Details** object in Salesforce, go to the **Setup** page and type "Tabs" in the Quick Find bar. Click on **Tabs**, then select **New** under **Custom Object Tabs**. Choose the **Customer Details** object, select a tab style, and click **Next**. On the **Add to Profiles** page, keep the default settings and click **Next** again. On the **Add to Custom App** page, uncheck the **Include Tab** option. Ensure that the **Append tab to users' existing personal customizations** is checked. Finally, click **Save** to complete the process.



Fields

In Salesforce, **Fields** represent the data stored in the columns of a relational database and hold important information for specific objects. There are two main types: **Standard Fields** and **Custom Fields**.

Standard Fields are predefined by Salesforce and perform essential functions. Some examples include **Created By**, **Owner**, and **Last Modified**, which are present in all Salesforce applications. Standard Fields that are not required can be deleted, but essential ones cannot be removed. These fields are automatically created during object setup, making data management tasks like searching, editing, and deleting records more efficient.

Creation of fields for the Customer Details object

To create fields for the **Customer Details** object in Salesforce, go to **Setup**, click on **Object Manager**, and search for **Customer Details**. Select the object, then click on **Fields & Relationships**, and choose **New**. Select **Phone** as the data type and click **Next**. For the **Field Label**, enter "Phone Number" (the field name auto-generates), then click **Next**, **Next**, and **Save and New**.

To create another field, repeat the steps, but this time select **Email** as the data type. Enter **Gmail** as the **Field Label** (the field name auto-generates), then follow the same process to save the new field.

The screenshot shows the Salesforce Setup interface. At the top, there's a search bar and navigation tabs for Setup, Home, and Object Manager. Below this, the 'Customer1' object is selected in the Object Manager. The 'Fields & Relationships' section is active, showing a table of fields. A red arrow points to the 'Customer1' object, another red arrow points to the 'Fields & Relationships' tab, and a third red arrow points to the 'New' button in the top right corner of the 'Fields & Relationships' section.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Current Status	current_Status__c	PickList		
Customer Name	Name	Text(50)		✓
Email Id	Email_Id__c	Email (Unique)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Permanent Address	Permanent_Address__c	Text Area(255)		

Validation rule

Validation rules in Salesforce are used to ensure that data entered into a record meets specified criteria before it can be saved. When a user tries to save a record, the validation rule checks the data, and if it doesn't meet the defined conditions, an error message is triggered. The user is then prevented from saving the record until the data is corrected. This helps maintain data integrity and ensures that records adhere to business requirements. Validation rules can be created for both standard and custom objects, allowing for tailored data quality control within Salesforce applications.

Duplicate rule

The image shows two screenshots of the Salesforce Duplicate Rule configuration interface. The top screenshot is the 'Rule Details' page for a rule named 'matching Customer details'. It shows the 'Object' as 'Customer Details', the 'Rule Name' as 'matching Customer details', and the 'Unique Name' as 'matching_Customer_det'. The 'Matching Criteria' section shows a table with columns for 'Field', 'Matching Method', and 'Match Blank Fields'. The 'Field' column has dropdowns for 'Email', 'Phone Number', and three 'None' options. The 'Matching Method' column has dropdowns for 'Exact' for each field. The 'Match Blank Fields' column has checkboxes for each field. The 'Save' button is highlighted with a green arrow. The bottom screenshot is the 'Matching Rule Detail' page for the same rule. It shows the rule is 'Inactive' and has a status of 'Inactive'. The 'Created By' is 'project.2' and the 'Modified By' is 'project.2'. The 'Activate' button is highlighted with a green arrow.

Rule Details

Object: Customer Details

Rule Name: matching Customer details

Unique Name: matching_Customer_det

Description:

Matching Criteria

Tell the rule which fields to compare and how.

Field	Matching Method	Match Blank Fields
Email	Exact	<input type="checkbox"/>
Phone Number	Exact	<input type="checkbox"/>
None	Exact	<input type="checkbox"/>
None	Exact	<input type="checkbox"/>
None	Exact	<input type="checkbox"/>

Matching Rule Detail

matching Customer details

Object: Customer Details

Rule Name: matching Customer details

Unique Name: matching_Customer_details

Description:

Matching Criteria: (Customer Details: Email: Exact: MatchRule = FALSE) AND (Customer Details: Phone Number: Exact: MatchRule = FALSE)

Status: Inactive

Created By: project.2, 25/05/2023, 10:10 am

Modified By: project.2, 10/10/2023, 3:32 pm

Phone Number to **Exact** in the matching method. Once done, click **Save**. After saving, click on **Activate** to enable the matching rule for identifying duplicate customer details.

Profiles

A **profile** in Salesforce is a collection of settings and permissions that determine what users can do within the platform. Profiles control various aspects such as object permissions, field permissions, user permissions, tab settings, app settings, Apex class access, Visualforce page access, page layouts, record types, login hours, and IP ranges. They can be tailored to align with users' job functions, such as System Administrator, Developer, or Sales Representative.

There are two types of profiles:

1. **Standard Profiles:** These are pre-defined profiles provided by Salesforce, including Contract Manager, Read Only, Marketing User, Solutions Manager, Standard User, and System Administrator. Standard profiles cannot be deleted.
2. **Custom Profiles:** These are created by users to meet specific organizational needs and can be deleted if no users are assigned to them. Custom profiles allow for greater flexibility in managing user permissions.

sales person Profile

To create a Sales Person profile in Salesforce:

1. Go to **Setup** > type "Profiles" > click **Profiles** > clone the **Salesforce Platform User** profile.
2. Name the profile "Sales Person" and click **Save**.
3. Click **Edit** and set **Garage Management** as the default custom app.
4. In **Custom Object Permissions**, give access to **Appointments, Billing Details, Feedback, Service Records, and Customer Details**.
5. Save the changes to finalize the Sales Person profile setup.

Role & Role Hierarchy

In Salesforce, a **role** defines a user's visibility and access to records at a granular level. Roles determine what data users can view and interact with within the Salesforce organization. By assigning roles, administrators can control access to records based on the user's position or hierarchy within the organization.

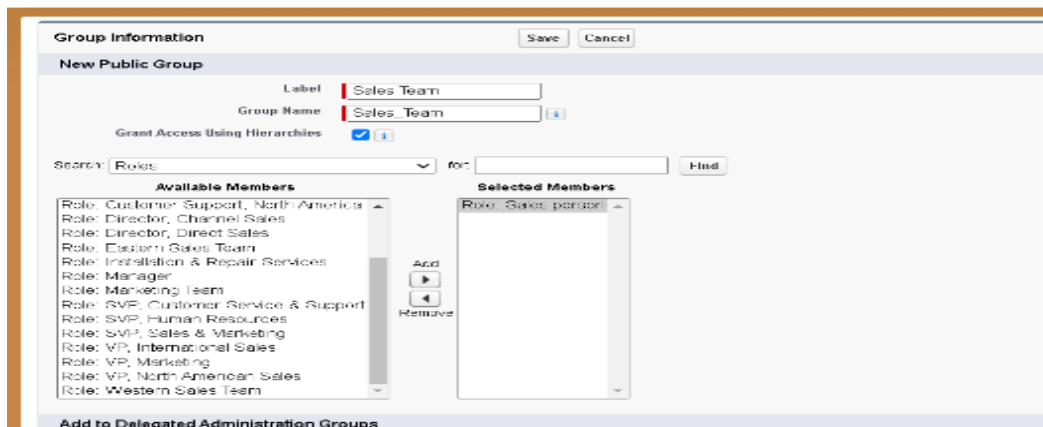
Roles work in conjunction with sharing rules and profiles to establish a comprehensive data access strategy. This ensures that sensitive information is only accessible to those who need it while promoting collaboration among users. Simply put, roles dictate what users can see and do with records in Salesforce, facilitating secure and organized data management.

The screenshot displays the Salesforce Setup interface for the 'Roles' section. On the left, a navigation sidebar includes a search bar with 'roles' entered, and a list of categories: Users, Roles (highlighted), Feature Settings, Sales, Service, and Case Teams. The main content area is titled 'Understanding Roles' and explains the purpose of role hierarchies. It features a 'Sample Role Hierarchy' diagram for a 'Territory-based Sample' organization. The hierarchy starts with 'Executive Staff' (CEO, President, CFO, VP, Sales) at the top. Below them are three regional sales directors: 'Western Sales Director', 'Eastern Sales Director', and 'International Sales Director'. Each director has a corresponding 'Sales Rep' role. The diagram includes permissions for each role, such as 'View & edit data, roll up forecasts, & generate reports for all users below' for the Executive Staff. At the bottom right, there is a 'Set Up Roles' button and a checkbox for 'Don't show this page again'.

Public groups

Public groups in Salesforce are a powerful tool for administrators and developers to enhance user management, data access, and security settings. By creating public groups, admins can group users together based on specific criteria, such as department or role, making it easier to manage permissions and share records. Public groups simplify the process of granting access to multiple users at once, ensuring they have the necessary resources for collaboration.

These groups can be used in sharing rules, reports, and dashboards to streamline data visibility and access control. Additionally, public groups help maintain a secure Salesforce environment by allowing for organized management of user permissions. Overall, effective use of public groups ensures users can access the right resources while upholding security and data integrity within the organization.



Flows

In Salesforce, a **flow** is a robust automation tool designed to streamline business processes and enhance user interaction. Flows enable users to collect, update, and manipulate data through a series of guided screens or steps, making it easier to manage complex workflows. Built with a user-friendly visual interface, flows can be created without requiring any coding knowledge, making them accessible to users of varying technical expertise.

Flows can automate repetitive tasks, ensuring consistency and efficiency in processes like data entry and approvals. They can be triggered by user actions, scheduled, or invoked from other processes. Additionally, flows allow for conditional logic, enabling tailored user experiences based on specific criteria. Overall, flows empower organizations to improve productivity and enhance user engagement within Salesforce.

Create a Flow

1.

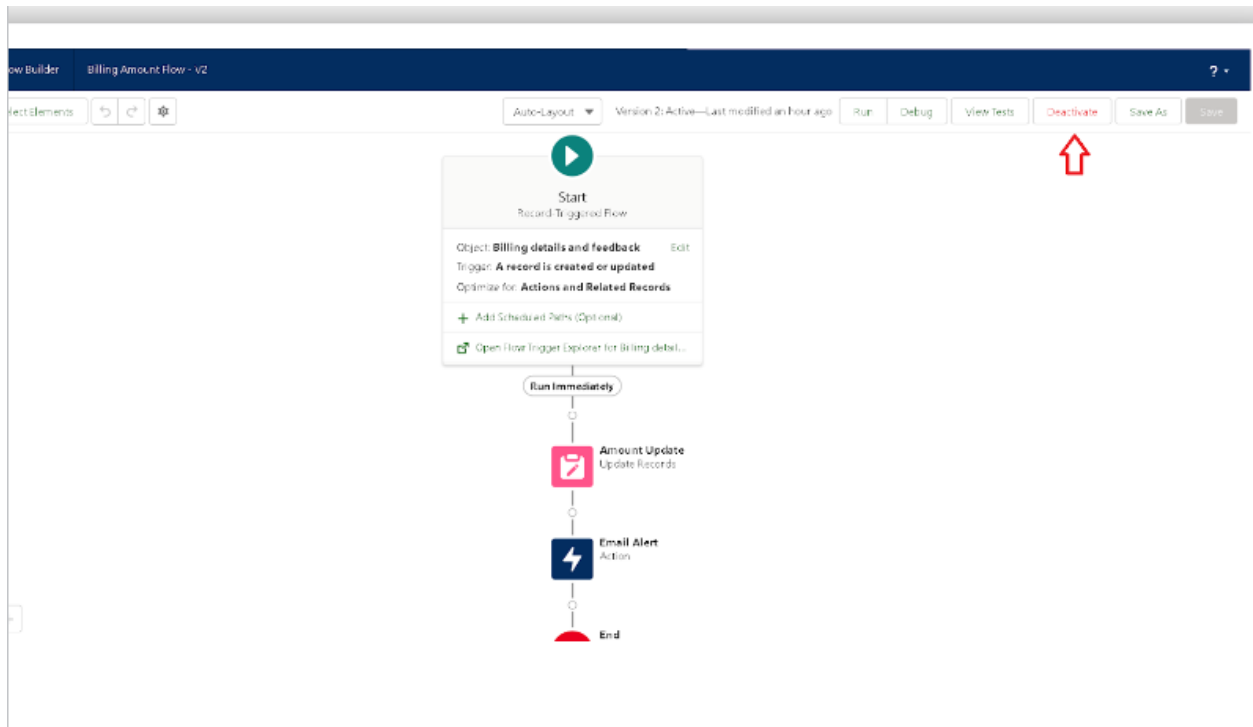
To create a **Record-Triggered Flow** in Salesforce, navigate to **Setup**, type **Flow** in the Quick Find box, and select **New Flow**. Choose **Record-Triggered Flow** and click **Create**. Select the object **Billing Details and Feedback** and set the trigger to fire when a record is created or updated. Optimize the flow for **Actions and Related Records**, then click **Done**.

Add an **Update Records** element by clicking the **+** symbol, label it **Amount Update**, and set the filter condition to update the field **Payment_Status__c** when it equals **Completed**. Set the field value for **Payment_Paid__c** to reference the service amount.

Next, create a **New Resource** as a **Variable** with the API name **alert**. Change the view to **Plain**

Text and paste the specified email body syntax.

Add an **Action** element for sending an email, label it **Email Alert**, set the body to the **alert** template, and include the recipient's email from the record. Add a subject line and save the flow, providing a label and allowing the API name to autopopulate. Finally, activate the flow to complete the setup.



Dashboards

Dashboards in Salesforce provide a visual representation of data, helping users quickly understand changing business conditions. They aggregate data from reports, enabling real-time analysis and informed decision-making. With dashboards, users can identify trends, track quantities, and measure the impact of their activities effectively.

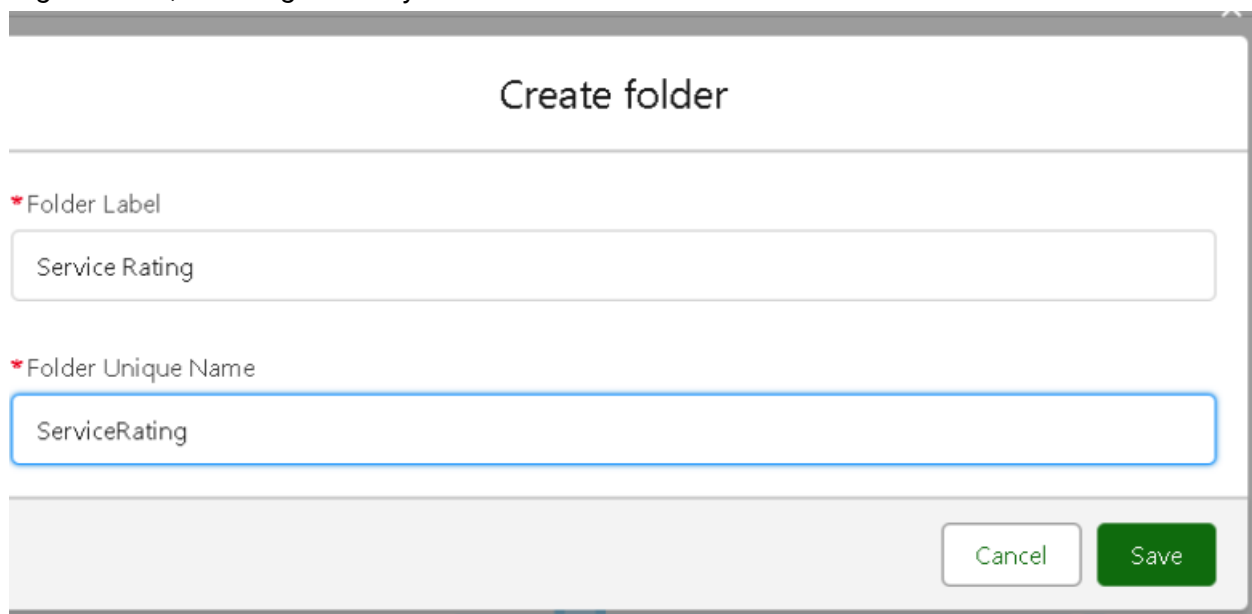
Before creating or sharing dashboards, it's essential to understand some basics, such as the types of components available (charts, graphs, tables), and how to customize them for clarity and relevance. Dashboards can be tailored to display key performance indicators (KPIs) that align with specific business goals. They also facilitate collaboration by allowing users to share insights with team members easily. Overall, dashboards are a crucial tool for monitoring performance and driving strategic actions in an organization.

Create Dashboard Folder

1.

To create a new dashboard folder in Salesforce, click on the **App Launcher** and search for **Dashboard**. Once in the dashboard tab, click on **New Folder** and enter the folder label as **Service Rating Dashboard**. The unique name will auto-populate; then click **Save** to create the folder.

Next, follow the same steps as before to create additional folders as needed. After creating the folder, navigate to the sharing settings for the **Service Rating Dashboard** folder. Set the appropriate sharing settings to control who can view or edit the dashboard within the organization, ensuring that only authorized users have access to



Create folder

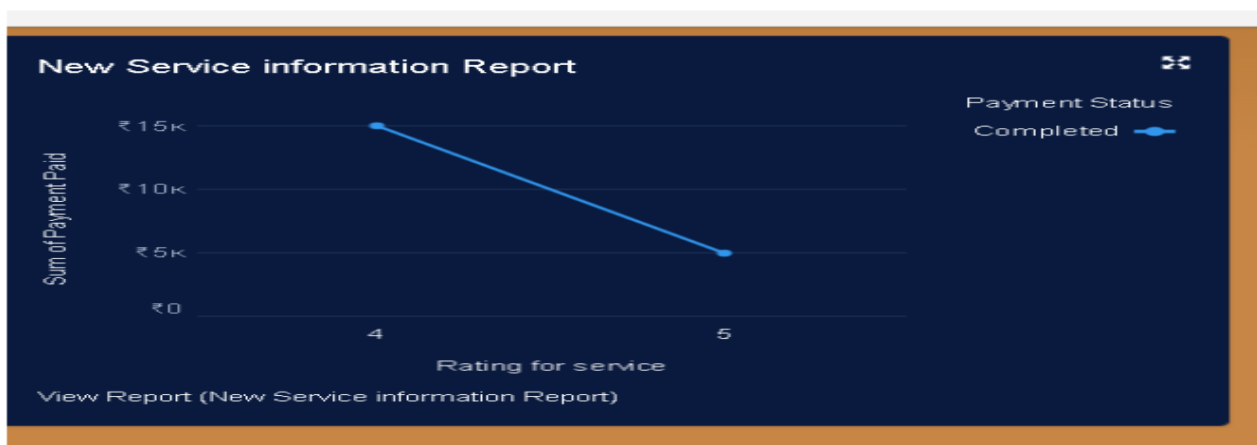
*Folder Label

Service Rating

*Folder Unique Name

ServiceRating

Cancel Save



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