

## 1. Object Configuration

**1.1 Billing details and Feedback** :- Salesforce Billing manages the billing lifecycle, from order to cash, including invoice generation, payment processing, and revenue recognition.

Setup → Object Manager → Billing details and Feedback → Fields & Relationships

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** SETUP > OBJECT MANAGER
- Page Title:** Billing details and feedback
- Left Sidebar:** Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules.
- Table:** Fields & Relationships (8 items, Sorted by Field Label)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Billing details and feedback Name	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Payment Paid	Payment_Paid__c	Picklist		
Payment Status	Payment_Status__c	Picklist		
Rating for service	Rating_for_service__c	Text(1)		
Service records	Service_records__c	Lookup(Service records)		✓

**1.2 Service records** :- Objects that store information about customer service interactions and related data.

Setup → Object Manager → Service records → Fields & Relationships

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** SETUP > OBJECT MANAGER
- Page Title:** Service records
- Left Sidebar:** Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules.
- Table:** Fields & Relationships (8 items, Sorted by Field Label)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment	Appointment__c	Lookup(Appointment)		✓
Appointment1	Appointment1__c	Master-Detail(Appointment)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Quality Check Status	Quality_Check_Status__c	Checkbox		
service date	service_date__c	Formula (Date)		
Service records Name	Name	Auto Number		✓
Service Status	Service_Status__c	Picklist		

**1.3 Appointment:-** Salesforce Scheduler, now known as Salesforce Appointments, is a tool that enables businesses to streamline and manage appointment scheduling within the Salesforce platform.

Setup → Object Manager → Appointment → Fields & Relationships

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Search Setup, Home, Object Manager
- Breadcrumbs:** SETUP > OBJECT MANAGER > Appointment
- Left Sidebar (Fields & Relationships):**
  - Page Layouts
  - Lightning Record Pages
  - Buttons, Links, and Actions
  - Compact Layouts
  - Field Sets
  - Object Limits
  - Record Types
  - Related Lookup Filters
  - Search Layouts
  - List View Button Layout
  - Restriction Rules
  - Scoping Rules
- Table:** Fields & Relationships (12 items, sorted by Field Label)
 

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment Date	Appointment_Date__c	Date		
Appointment Name	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Customer Details	Customer_Details__c	Lookup(Customer Details)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Maintenance Service	Maintenance_Service__c	Checkbox		
Owner	OwnerId	Lookup(User,Group)		✓
Repairs	Repairs__c	Checkbox		
Replacement Parts	Replacements_parts__c	Checkbox		
Service Amount	Service_Amount__c	Currency(19,2)		

**1.4 Customer Details:-** Crucial for building strong customer relationships and driving business success.

Setup → Object Manager → Customer Details → Fields & Relationships

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Search Setup, Home, Object Manager
- Breadcrumbs:** SETUP > OBJECT MANAGER > Customer Details
- Left Sidebar (Fields & Relationships):**
  - Page Layouts
  - Lightning Record Pages
  - Buttons, Links, and Actions
  - Compact Layouts
  - Field Sets
  - Object Limits
  - Record Types
  - Related Lookup Filters
  - Search Layouts
  - List View Button Layout
  - Restriction Rules
  - Scoping Rules
- Table:** Fields & Relationships (6 items, sorted by Field Label)
 

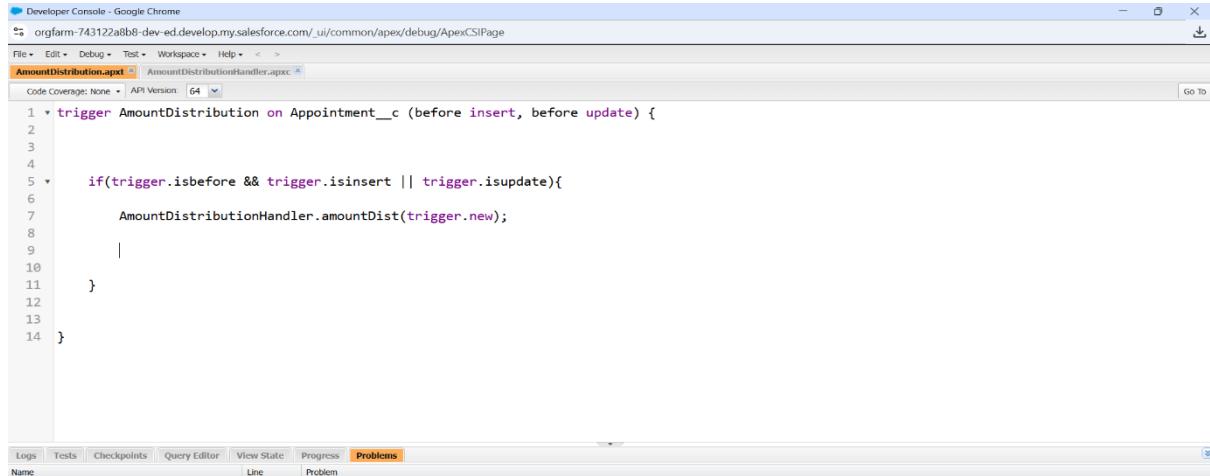
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer Name	Name	Text(80)		✓
Gmail	Gmail__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
phone no	phone_no__c	Phone		

## 2. Apex Trigger and Class

### 2.1 Apex Trigger :- Amount distribution

Crucial for automating complex logic that goes beyond what standard declarative tools can handle.

Developer Console → File → Open Trigger → Show Code

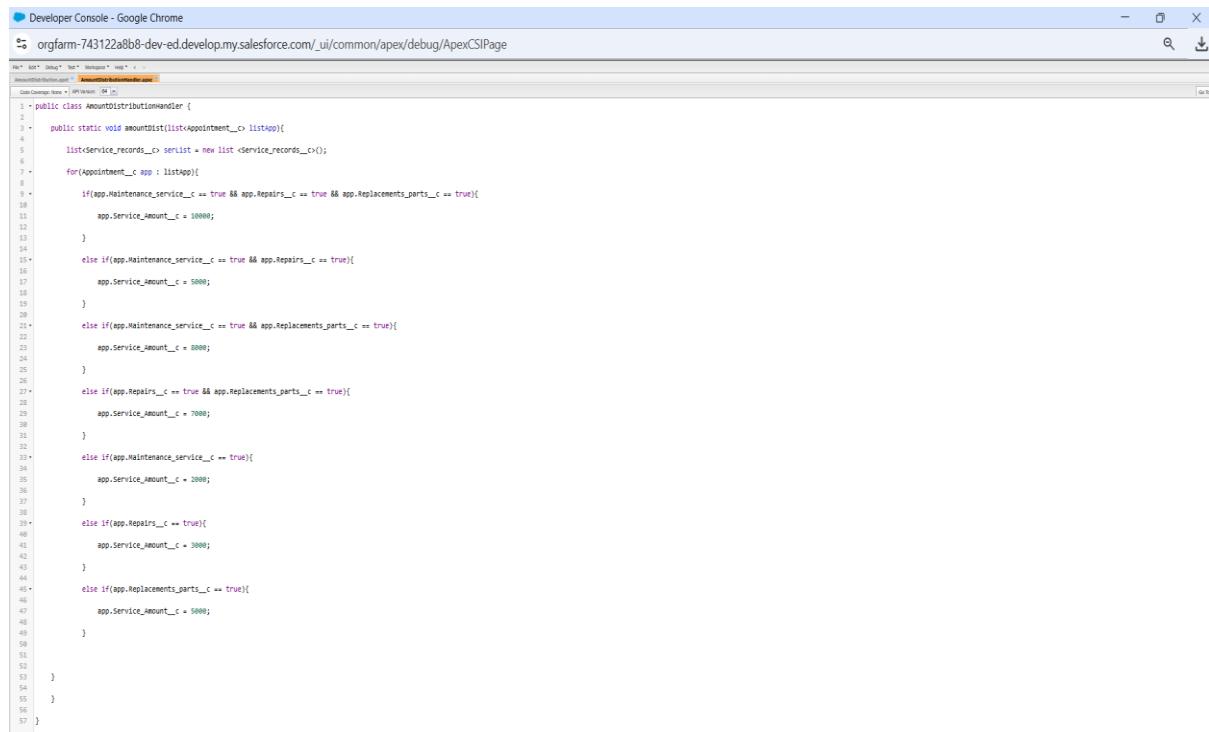


```
trigger AmountDistribution on Appointment__c (before insert, before update) {
    if(trigger.isbefore && trigger.isinsert || trigger.isupdate){
        AmountDistributionHandler.amountDist(trigger.new);
    }
}
```

### 2.2 Apex Class :- Amount distribution handler

Fundamental building blocks that define the structure and behavior of your application's logic.

Developer Console → File → Open Class → Show Cod

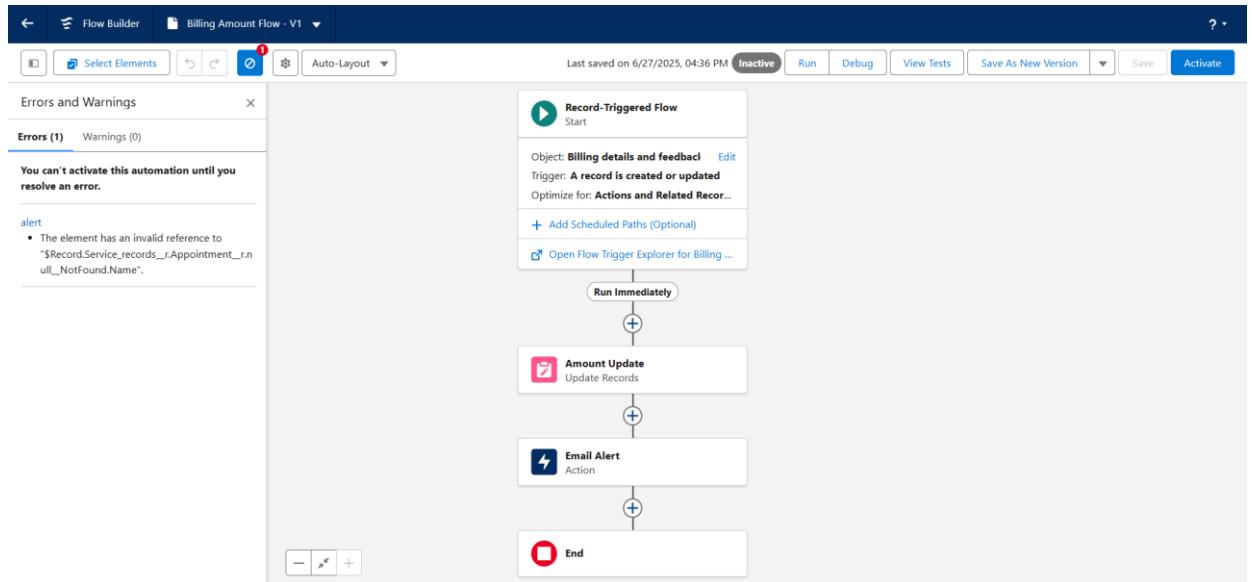


```
public class AmountDistributionHandler {
    public static void amountDist(List<Appointment__c> listApp){
        List<Service_Records__c> serList = new List<Service_Records__c>();
        for(Appointment__c app : listApp){
            if(app.Maintenance_Service__c == true && app.Repairs__c == true && app.Replacements_Parts__c == true){
                app.Service_Amount__c = 10000;
            }
            else if(app.Maintenance_Service__c == true && app.Repairs__c == true){
                app.Service_Amount__c = 5000;
            }
            else if(app.Maintenance_Service__c == true && app.Replacements_Parts__c == true){
                app.Service_Amount__c = 8000;
            }
            else if(app.Repairs__c == true && app.Replacements_Parts__c == true){
                app.Service_Amount__c = 7000;
            }
            else if(app.Maintenance_Service__c == true){
                app.Service_Amount__c = 2000;
            }
            else if(app.Repairs__c == true){
                app.Service_Amount__c = 3000;
            }
            else if(app.Replacements_Parts__c == true){
                app.Service_Amount__c = 5000;
            }
        }
    }
}
```

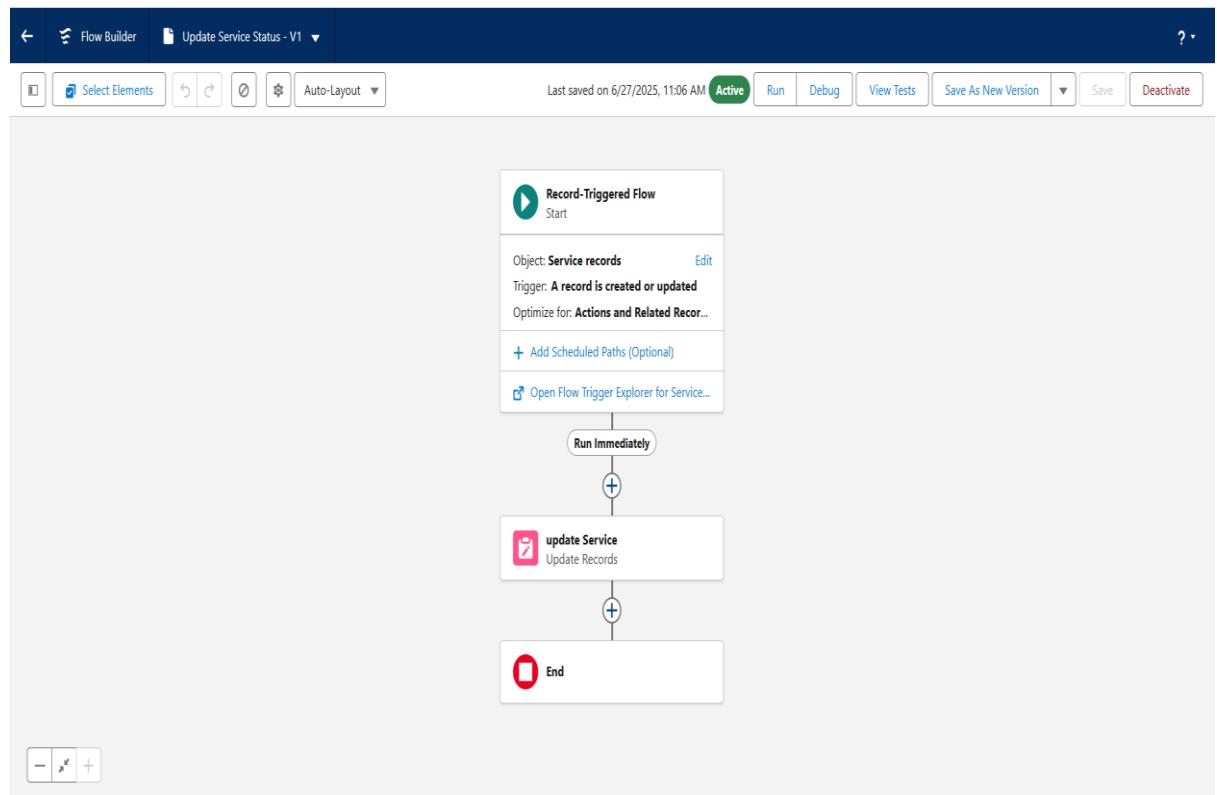
### 3. Flow :- Billing details and Feedback and Service record

Salesforce Billing manages the financial aspects of transactions, while feedback and service records are related to customer interactions and support.

#### 1. Setup → Flows → Billing Amount flows



#### 2. Setup → Flows → Update Service Status



## 4. Profiles and Permission Sets

**4.1 Profiles** :- Defines a user's permissions and access settings.

Setup → Profiles → Manager

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected under 'Manager'. The profile 'Manager' is displayed, showing details like Name (Manager), User License (Salesforce), and Description (Created By Mounika Iakshmi Aiyam, 6/26/2025, 3:51 AM). The 'Profile Detail' section includes buttons for Edit, Clone, Delete, and View Users. The 'Page Layouts' section lists various layouts for different object types, each with a 'Global' column and a 'Location Group Assignment' column. The left sidebar shows navigation links for Setup, Home, Object Manager, and various administrative modules like Release Updates, Salesforce Mobile App, Optimizer, and Data.

**4.2 Permission Set** :- A collection of settings and permissions that grant users access to specific features and functionality, extending beyond what's available in their profiles.

Permission set details

The screenshot shows the Salesforce Setup interface with the 'Permission Sets' tab selected under 'Manager'. The 'Permission Sets' page displays a list of existing permission sets, including 'Action', 'Permission Set Name', 'Description', and 'License' columns. One row is highlighted: 'Agentforce Service Agent Configuration' with a warning icon, which is described as 'Build and manage autonomous AI service agents'. The left sidebar shows navigation links for Setup, Home, Object Manager, and various administrative modules like Hyperforce Assistant, Email, Apps, Mobile Apps, Feature Settings, Analytics, Reports & Dashboards, Chatter, and Groups.

## 5. Page Layouts

control the structure and organization of fields, buttons, custom links, and related lists on record detail and edit pages.

Setup → Object Manager → Page Layouts

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Search Setup, various icons (star, plus, question mark, gear, etc.).
- Breadcrumb:** SETUP > OBJECT MANAGER.
- Title:** Billing details and feedback.
- Left sidebar:** Details, Fields & Relationships, **Page Layouts** (selected), Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules.
- Table:** Page Layouts (1 item, sorted by Page Layout Name).

PAGE LAYOUT NAME	CREATED BY	MODIFIED BY
Billing details and feedback Layout	Mounika Lakshmi Anyam, 6/26/2025, 2:21 AM	Mounika Lakshmi Anyam, 6/26/2025, 5:00 AM
- Buttons:** Quick Find, New, Page Layout Assignment.

## 6. Reports

Provide a way to organize and analyze data, offering valuable insights into various aspects of the business.

Go to App launcher → Garage Management Application → Reports → New Service information Report

The screenshot shows the Garage Management Application Reports screen with the following details:

- Header:** Search..., various icons (star, plus, question mark, gear, etc.).
- Breadcrumb:** Garage Management... > Reports > New Service information Report.
- Chart:** A horizontal bar chart titled "Record Count" showing values for categories 3, 4, and 5. The x-axis ranges from 0 to 1.0. Category 3 has a value of 3, category 4 has a value of 4, and category 5 has a value of 5.
- Table:** Details (3 Rows).

	Customer Name	Appointment Name	Service Status	Payment Paid
1	jay	app-001	Started	2
2	jay	app-001	Started	2
3	jay	app-001	Started	2
4				
- Bottom controls:** Row Counts, Detail Rows, Grand Total, Stacked Summaries.

## 7. Dashboards

Crucial for visualizing key business metrics and enabling data-driven decision-making.

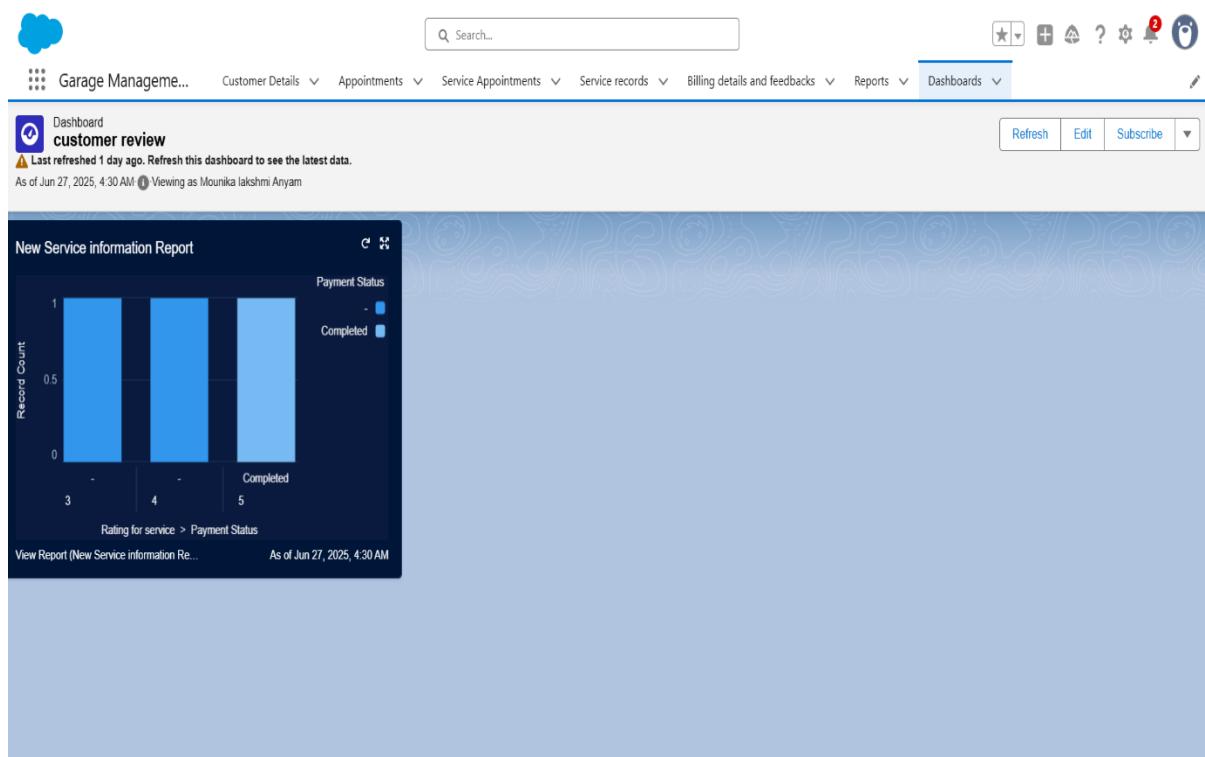
### 1. Dashboard Builder

The screenshot shows the 'Garage Management' software interface with the 'Dashboards' tab selected. On the left, a sidebar lists categories: 'Recent', 'DASHBOARDS' (Recent), 'Folders' (All Folders), and 'Favorites' (All Favorites). The main area displays a table of dashboards:

Dashboard Name	Description	Folder	Created By	Created On	Subscribed
customer review		Service Rating dashboard	Mounika lakshmi Anyam	6/27/2025, 3:05 AM	

At the top right, there are search, new dashboard, and new folder buttons, along with a gear icon for settings.

### 2. Graph and Tables in use



## 8. Sample Data Screens

Salesforce Screen Flows present interactive screens to users, enabling data input and enhancing user experience for tasks like data collection and automation.

### 1. Customer Details

The screenshot shows the Salesforce interface for 'Customer Details'. The top navigation bar includes links for 'Customer Details', 'Appointments', 'Service Appointments', 'Service records', 'Billing details and feedbacks', 'Reports', and 'Dashboards'. A search bar at the top right contains the placeholder 'Search...'. Below the navigation is a toolbar with icons for 'New', 'Import', 'Change Owner', and 'Assign Label'. A 'Recently Viewed' section displays a single item: 'jay' under 'Customer Name'. The list view shows two items: '1 jay' and '2 jay'.

### 2. Appointments

The screenshot shows the Salesforce interface for 'Appointments'. The top navigation bar includes links for 'Customer Details', 'Appointments', 'Service Appointments', 'Service records', 'Billing details and feedbacks', 'Reports', and 'Dashboards'. A search bar at the top right contains the placeholder 'Search...'. Below the navigation is a toolbar with icons for 'New', 'Import', 'Change Owner', and 'Assign Label'. A 'Recently Viewed' section displays two items: 'app-004' and 'app-001' under 'Appointment Name'. The list view shows three items: '1 app-004', '2 app-001', and '3 app-001'.

### 3. Service Appointments

The screenshot shows the 'Service Appointments' section of the Garage Management software. The top navigation bar includes links for Customer Details, Appointments, Service Appointments (which is the active tab), Service records, Billing details and feedbacks, Reports, and Dashboards. A search bar at the top right contains the placeholder 'Search...'. Below the navigation is a 'Recently Viewed' section with a 'Service Appointments' link and a 'New' button. The main content area displays a blue illustration of a building with a keyhole and birds flying over mountains. A message 'Nothing to see here' is centered, followed by the subtext 'There's nothing in your list yet. Try adding a new record.' A search bar at the bottom right allows users to 'Search this list...'.

### 4. Service records

The screenshot shows the 'Service records' section of the Garage Management software. The top navigation bar includes links for Customer Details, Appointments, Service Appointments, Service records (which is the active tab), Billing details and feedbacks, Reports, and Dashboards. A search bar at the top right contains the placeholder 'Search...'. Below the navigation is a 'Recently Viewed' section with a 'Service records' link and a 'New' button. The main content area displays a table with four items, each with a checkbox and a name: 1. ser-007, 2. ser-006, 3. ser-005, and 4. ser-004. A search bar at the bottom right allows users to 'Search this list...'.

## 5. Billing details and feedback

The screenshot shows a web-based application interface for 'Garage Management'. The top navigation bar includes links for Customer Details, Appointments, Service Appointments, Service records, Billing details and feedbacks (which is the active tab), Reports, and Dashboards. A search bar and various toolbar icons are also present. The main content area displays a list titled 'Billing details and feedbacks' under the 'Recently Viewed' section. The list contains five items, each with a checkbox and a name: bill-005, bill-004, bill-003, bill-001, and bill-002. The first item, bill-005, is highlighted with a blue selection box around its checkbox. The list is paginated with a 'v' icon at the bottom right.

	Billing details and feedback Name
1	<input checked="" type="checkbox"/> bill-005
2	<input type="checkbox"/> bill-004
3	<input type="checkbox"/> bill-003
4	<input type="checkbox"/> bill-001
5	<input type="checkbox"/> bill-002