**PROJECT TITLE**

College Name: Ppg college **of** arts and **science**

**College** Code:**bruap**

**TEAM ID:** 1594567B1C0AD53BEC545C6BA3E09C94

**TEAM MEMBERS: 4**

**Team LeaderName: Priyadharshini R**

**Email:** 2322k0326.cas@ppg.edu.in

**Team Member1:**

**Dharani D**

**Email: 2322k0297.cas@ppg.edu.in**

**Team Member**: **Kalaiyarasan D**

**Email: 2322k0790.cas@ppg.edu.in**

**Team Member: Nizath Irfan**

Email: **2322k0322.cas@ppg.edu.in**

salesforce

**Sign** up **for your Salesforce** Developer **Edition**

A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to

help you make the most of your trial.

**Build enterprise**-**quality** apps **fast to bring your ideas to life**

Build apps fast with drag and drop tools

Customize your data model with clicks

Go further with Apex code

Integrate with anything using powerful APIs

Stay protected with enterprise-grade security Customize UI with clicks or any leading-edge web framework

First Name\*

Your first name

Emall\*

Your email address

Role**\***

Your job role

Company\*

Company Name

Last Name\*

Your last name

>

EM Gmail

0

\* ᄆ

Search ma

0 &

D

Welcome to Salesforce: Verify your account or

developer@salesforce.com-devel

lesforce.com

to me **-**

salesforce

**Thanks** for **signing** up with Salesforce!

venly Account

**150**

10:30 **(**1 minute ago)

D

+ "

**F**

Tabs | Salesforce

← → C@com-Se-dev-ed develop **lightning** force.com/ightning/setup/CustomTabs/home

Setup

Ratan Tate are 3161

Try using Gear

Tabs

Q Search S

I

Robtom **Tabs**

You can create a **tace** to endorse trattore appication nctoraty

Custom Object ca 10 ore e le you to enced area icons **and** come to view you enced vafore cages gring

Costore **Object** Tabe

6 Ow GatzCS)

Cse Owl Exca

13

6:50 Ow 30

Co Ow

E

931

Deak

Coe Ou Cec

Computer

Overton

The College Vargem

The Moon

The

**X**

App **Manager** | Salesforce

x

← → C @sbcom-Se-der-ed develop **lightning** force.com/ightning/setup/NavigationMenu/home

Setup

Q M

Trying Search

Q Search Sea

**Lightning Experience App Manager**

Clow AppetBeta**)**

App Name 1

~ Developer Name ✓ Descripsien

AppLauncher

Crater Desco

Charter Cen

**Charters**

AR

Charter Mobile for Bacder. One for 1st

The Seletore.com Crater Mobile

acciaion **that**

Chattery

? A

New Lighting App

New Connectwo Are

Last Modified.. → App Type

VL.

**04/02/2022** 1213 Classic

**24/12/20221018** Ling

Corrected (Varage)

**you access** Crater **cat** on the 23/12/2002 405 on Connected (Varaged)

Cortant

Communs

Comert

Sestre CTM Commun

04/02/2022 12:13 Classic

Stone C458 Content

12

Data Manager

CeraManager

Use Data Manager **to** view monnor usage and manage recces

**04/12/2002** 12:13 am Lining

**X**

LABEL

Customer

SETUP

**Object Manager**

2 Items. Sorted by Label

API NAME

Customer

**TYPE**

Standard Object

Customer Details

Customer Details\_c

Custom Object

Q cus

Schema Builder

Create

DESCRIPTION

LAST MODIFIED

DEPLOYED

05/10/2023

Setup

Home

Object Manager

SETUP

**Object Manager**

7 Items, Sorted by Label

LABEL

Appointment

A

API NAME

**TYPE**

DESCRIPTION

Appointment\_c

Custom Object

Appointment Category

Appointment Invitation

AppointmentCategory

Standard Object

Appointmentinvitation

Standard Object

Appointment Invitee

Appointmentinvitee

Standard Object

Q app

Schema Builder

Create

LAST MODIFIED

DEPLOYED

24/08/2023

SETUP OBJECT MANAGER

**Appointment**

**Next**

Cancel

Details

**Fields** & **Relationships**

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Specify the type of information that the custom field will contain.

**Data Type**

O **None** Selected

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Auto Number

Formula

Roll-Up Summary

Lookup Relationship

O Master-Detail Relationship

External Lookup Relationship

Checkbox

Currency

Select one of the data types below.

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

• The relationship field is required on all detail records.

The ownership and sharing of a detail record are determined by the master record.

• When a user deletes the master record, all detail records are deleted.

• You can create rollup summary fields on the master record to summanze the detail records.

The relationship field allows users to click on a lookup icon to select a value from a **popup** list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another

**Step** 2. **Enter the details**

Field Label

Service Amount

**Step 2 of 4**

Previous

**Next** Cancel

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length

18

Field Name

Number of digits to the left of the decimal point Service\_Amount

Description

Help Text

Required

Auto add to custom report type

Always require a value in this field in order to save a record

Add this field to existing custom report types that contain this entity

to

Decimal Places

0

Number of digits to the right of the decimal point

**Step 2. Enter** the **details**

Field Label

Vehicle number plate

Length

Field Name

Description

Help **Text**

Please enter the maximum length for a text field below.

10

Vehicle\_number\_plate

Required

Unique

External **ID**

Auto add **to** custom report type

Always require a value in this field in order to save a record

Do not allow duplicate values

Treat "ABC" and "abc" as duplicate values (case insensitive) Treat "ABC" and "abc" as different values (case sensitive)

Set this field as the unique record identifier from an external system

Add this field to existing custom report types that contain this entity

་་

**Previous**

**Step** 2 **of 4**

**Next** Cancel

**Step 2. Enter** the **details**

Field Label

Vehicle number plate

Length

Field Name

Description

Help **Text**

Please enter the maximum length for a text field below.

10

Vehicle\_number\_plate

Required

Unique

External **ID**

Auto add **to** custom report type

Always require a value in this field in order to save a record

Do not allow duplicate values

Treat "ABC" and "abc" as duplicate values (case insensitive) Treat "ABC" and "abc" as different values (case sensitive)

Set this field as the unique record identifier from an external system

Add this field to existing custom report types that contain this entity

་་

**Previous**

**Step** 2 **of 4**

**Next** Cancel

**Step 2.** Choose **output type**

Field Label

service date

Auto add to custom report type

Add this field to existing custom report types that contain this entity

**Formula Return Type**

None Selected

Select one of the data types below.

Field Name service\_date

**Checkbox**

Currency

Date

Date**/Time**

Calculate a boolean value

Example: TODAY() > CloseDate

Calculate a dollar or other currency amount and automatically format the field as a currency amount. Example: Gross Margin = Amount - Cost\_c

Calculate a date, for example, by adding or subtracting days to other dates.

Example: Reminder Date CloseDate - 7

=

Calculate a date/time, for example, by adding a number of hours or days to another date/time. Example: Next = NOW()+1

**Step** 2 **of 5**

Previous

**Next** Cancel

SETUP OBJECT MANAGER

**Appointment**

Buttons, Links, and Actions

Compact Layouts

Field Sets

**Validation Rules**

1 Items, Sorted by Rule Name

RULE NAME

Vehicle

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Scoping Rules

Triggers

Flow Triggers

Validation **Rules**

4

ERROR LOCATION

ERROR **MESSAGE**

**ACTIVE**

MODIFIED BY

Vehicle number plate

Please enter vaild number

project 2, 25/09/2023, 11:56 am

New

**Validation Rule Edit**

**Rule Name**

rating\_should\_be\_less\_than\_5

**Active**

**Description**

✔

**Error Condition Formula**

**Save Save** & **New Cancel**

16

**Quick Tips**

• Operators & Functions

\*= Required **Information**

Setup Home

Q matching

Data

Object Manager

SETUP

d

**Matching Rules**

✓ Duplicate Management

Matching Rules

Didn't find what you're looking for? Try using Global Search.

All Matching Rules

**What** Are Matching **Rules?**

View: All Matching Rules

Create New View

Action

Rule Name +

Help for this Page

[Expand]

New Rule

ABCDEFGHIJKLMNOPORSTU | V | W | X | Y | Z | Other | All

Object

Status

Description

**Last** Modified Date

Last Modified By

Q Dupli

SETUP

d

**Duplicate Rules**

✓ Data

Duplicate Management

Duplicate Error Logs

Duplicate Rules

Matching Rules

Didn't find what you're looking for? Try

using Global Search.

All Duplicate Rules

**What** Are Duplicate Rules**?**

View: All Duplicate Rules

Help for this Page

[Expand]

ABCDEFGHIJ K L M N O P Q R S T U V W X Y Z Other All

Active

Last Modified By

Last **Modified** Date

atching Rule

etching Customer details

Billing details and feedback

Contact

andard Account Matching Rule

✓

R R

p2

andard Lead Matching Rule

✓

R

andard Contact Matching Rule

andard Lead Matching Rule andard Contact Matching Rule

✓

R2

Rule Name +

Customer Detail duplicate

Standard Account Duplicate Rule

Standard Contact Duplicate Rule

Standard Lead Duplicate Rule

Description

Identify accounts that duplicate other accounts

Identify contacts that duplicate other contacts and leads.

Identify leads that duplicate other leads and contacts.

**New** Rule

Account

Appointment

Customer Details

Environment

Individual

Laptop

Lead

10/10/2023

24/08/2023

24/08/2023

24/08/2023

CDEFGHIJKLMNOPQRSTU V W X Y Z Other All

a pro

Setup

Home

Object Manager v

✓ Users

Profiles

SETUP

**Profiles**

✓ Data

Mass Transfer Approval Requests

Feature Settings

✓ Data.com

Clone Profile

Enter the name of the new profile.

**You must select an** existing **profile to clone from.**

Existing Profile

User License

Profile Name

Standard User

Salesforce

Manager

Prospector Preferences

Prospector Users

Functions

Marketing

**Save** Cancel

Help for this Page

=

Required Information

**Custom Object Permissions**

Basic Access

Read

Data Administration

Create

**Edit**

Delete

View All

Modify All

Appointments

Billing details and feedback

Customer Details

Environments

O

Laptops

**Service** records

SessionData

Basic Access

Read

Data Administration

Create

**Edit**

Delete

View All

Modify All

Q roles

Setup

**Users**

Roles

✓ Feature Settings

✓ Sales

Home

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Object Manager v

:

SETUP

**Roles**

Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role **Hierarchy**

View other sample Role Hierarchies: Territory-based Sample

Executive Staff

CEO **President**

View & edit date, roll up forecasts, & **generate** reports **for** all users below CFO VP, Sales **Cant** access data of **other**

Executive Staff

Western Sales Eastern Sales

Director

**Director**

of W. Sales

Director

Director

**of** E. Sales

International

Sales Director

Director

View & edit data. roll up forecasts, & **generate reports** for all users directly below

Can't access data

of users above or at same level

✓ Case Teams

Case Team Roles

Western **Sales Rep**

CA Sales Rep

NY Sales Rep

Contact Roles on Cases

OR **Sales Rep**

MA Sales Rep

Didn't find what you're

looking for? Try using Global

Search.

Eastern Sales **Rep**

International Sales **Rep**

Asian Sales Rep

European **Sales** Rep

Vew & edit data,

roll up forecasts.

& **generate reports**

only for own data **Cant** access **data** of

users above or at

same level

Set **Up Roles**

Don't show this page again

Help for this Page

Collapse All Expand All

**Thesmartbridge**

Add Role

CEO Edit | Del Assign

Add Role

**CFO** Edit Del Assign

Add Role

-coo Edit | Dell Assign

L

Add **Role**

**Manger** Edit | Del| Assign

Add Role

→**SVP**, **Customer Service & Support** Edit | Del Assign

L

Add Role

- **SVP, Human Resources** Edit | Del Assign

Add Role

**-SVP, Sales & Marketing** Edit | Del Assign

L

Add Role

New User

**User Edit**

**General Information**

First Name

Niklaus

**Last** Name

Alias

Email

Mikaelson

nmika

Username

Mikaelson@Niklaus

Nickname

nik

Title

Company

Department

Division

**Save**

**Save** & New Cancel

i

Role

**User** License

Manger

Salesforce

Manager

**Profile**

Active

✓

Marketing User

Offline **User**

Knowledge User

Flow **User**

Service Cloud User

Site.com Contributor User

Site.com Publisher User

**WDC User**

O

Data.com User Type

--None--

Help for this Page 7

Required Information

New User

**User Edit**

**General Information**

First Name

Niklaus

**Last** Name

Alias

Email

Mikaelson

nmika

Username

Mikaelson@Niklaus

Nickname

nik

Title

Company

Department

Division

**Save**

**Save** & New Cancel

i

Role

**User** License

Manger

Salesforce

Manager

**Profile**

Active

✓

Marketing User

Offline **User**

Knowledge User

Flow **User**

Service Cloud User

Site.com Contributor User

Site.com Publisher User

**WDC User**

O

Data.com User Type

--None--

Help for this Page 7

Required Information

**Group Information**

**New Public Group**

Label

Sales Team

Sales\_Team

Group Name

Grant Access Using Hierarchies

Search: Roles

Available **Members**

Role: Customer Support, North America

Role: Director, Channel Sales

Role: Director, Direct Sales

Role: Eastern Sales Team

Role: Installation & Repair Services

Add

Role: Manager

Role: Marketing Team

Role: SVP, Customer Service & Support

Remove

Role: SVP, Human Resources

Role: SVP, Sales & Marketing

Role: VP, International Sales

Role: VP, Marketing

Role: VP, North American Sales

Role: Western Sales Team

**Add to Delegated** Administration **Groups**

**Save** Cancel

for:

**Find**

**Selected Members**

Role: Sales person

I

=

Required Information

SETUP

**Sharing Settings**

Tou **call** use strany rules uilly Lu yi dill wider aLLESS LU UALA, TIUL LU TESUILL ALLESS.

**Step 1**: **Rule Name**

Label

Rule Name

sharing settings

sharing\_settings

Description

**Step 2: Select** your rule type

Rule **Type**

Based on record owner Based on criteria

**Step 3: Select** which **records to be shared**

Service records: owned by members of

Roles

**Step 4: Select the users to share with**

**Share with**

Roles

**Step 5**: **Select the level of access for the users**

Access Level

Read/Write

**Save**

**Cancel**

Sales person

Manager

**|** = Required Information

**Step 2.** Define **Report Records Set**

This report type will generate reports about Customer Details. You may define which related records from other objects at

A **Customer** Details

**Primary Object**

®-

B Appointments

-----

A to B **Relationship:**

Each "A" record must have at least one related "B" record.

O"A" records may or may not have related "B" records.

(Click to relate another object)

-

X

A

A

**B**

B

**Step 2.** Define **Report Records Set**

This report type will generate reports about Customer Details. You may define which related records from other objects at

A **Customer** Details

**Primary Object**

®-

B Appointments

-----

A to B **Relationship:**

Each "A" record must have at least one related "B" record.

O"A" records may or may not have related "B" records.

(Click to relate another object)

-

X

A

A

**B**

B

\* Report Name

New Service information Report

Report Unique Name O

New\_Service\_information\_Report\_oVu

Report Description

Folder

Garage Management Folder

T

Save Report

Select Folder

Cancel

Save

\* Name

Customer review

Description

Folder

Service Rating

New Dashboard

Select Folder

Cancel

Create

\*Folder Label

Service Rating

\*Folder Unique Name

ServiceRating

Create folder

**X**

Cancel

Save

e

d

e

Information

\*Customer Name

Mac

Phone number

5678765567

Gmail

mac@gmail.com

New Customer Detail

5

Owner

5

5

Annapurna SmartBridge

Cancel

Save & New

Save

Required Information