WORKFORCE ADMINISTRATION SOLUTION

By

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SKILL WALLET ID - **SWUID20240013668**

Project Abstract

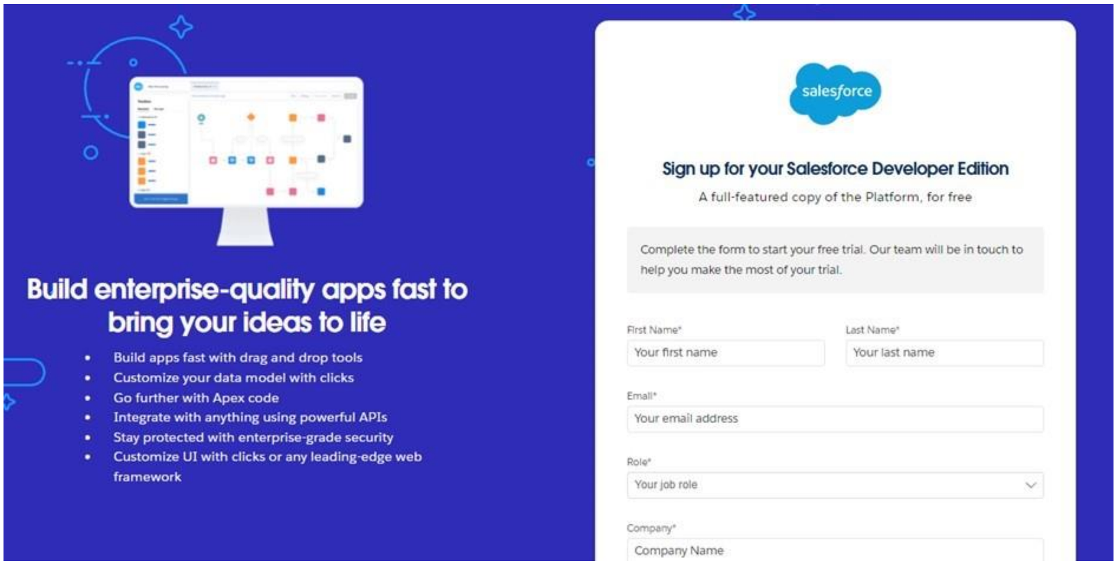
Garage Management system is a software application or platform designed to streamline and automate various aspects of employee's working on projects and Asset Assignment processes within an organization. It serves as a centralized system for managing employee data, number of projects an employee is working on, tracking employee performance, and keeping record for the assets which they are assigned to.

INDEX Page

INTRODUCTION

The Garage Management System (GMS) is a comprehensive solution that empowers automotive repair facilities to streamline operations, enhance efficiency, and deliver exceptional customer service. By centralizing appointment scheduling, inventory management, job tracking, and customer relationship management, GMS enables garages to improve customer satisfaction, increase profitability, and stay competitive in the industry. With its user-friendly interface and powerful features, GMS provides automotive repair facilities with the tools they need to succeed in today's fast-paced market.

Task 1: Salesforce



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

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- 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

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First Name* Your first name

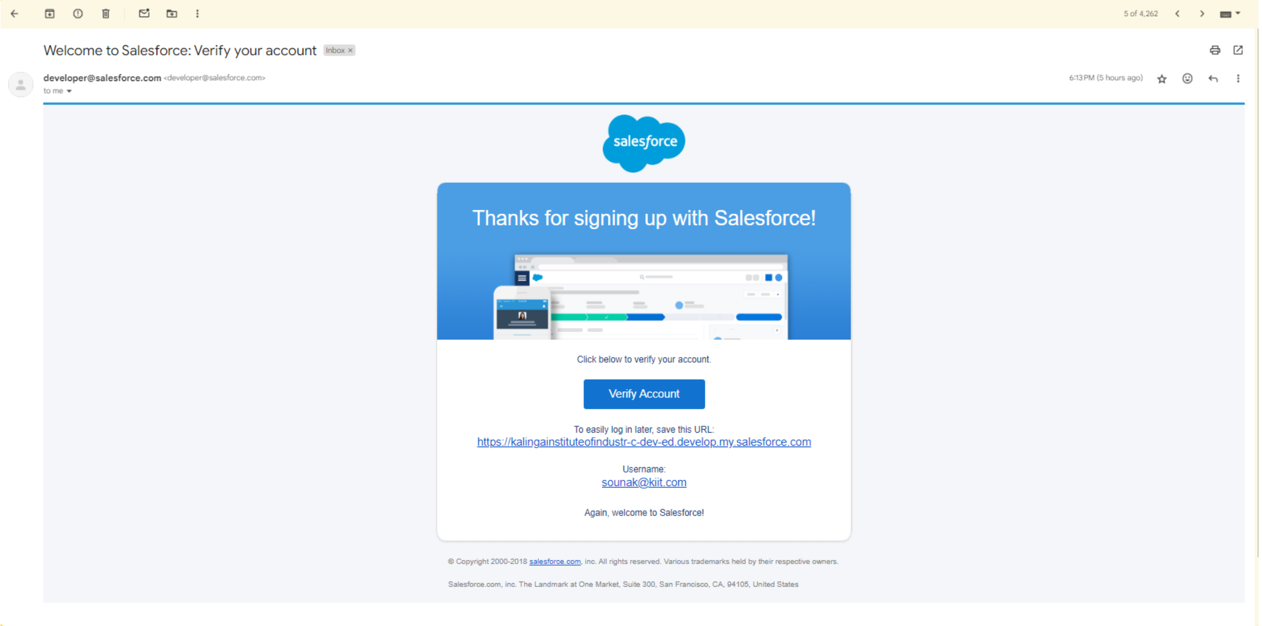
Last Name* Your last name

Email* Your email address

Role* Your job role

Company* Company Name

Activity 1: Creating Developer Account



Welcome to Salesforce: Verify your account

developer@salesforce.com <developer@salesforce.com>

Thanks for signing up with Salesforce!

Click below to verify your account.

To easily log in later, save this URL:
https://kalingainstituteofindustr-c-dev-ed.develop.my.salesforce.com

Username:
sounak@kiit.com

Again, welcome to Salesforce!

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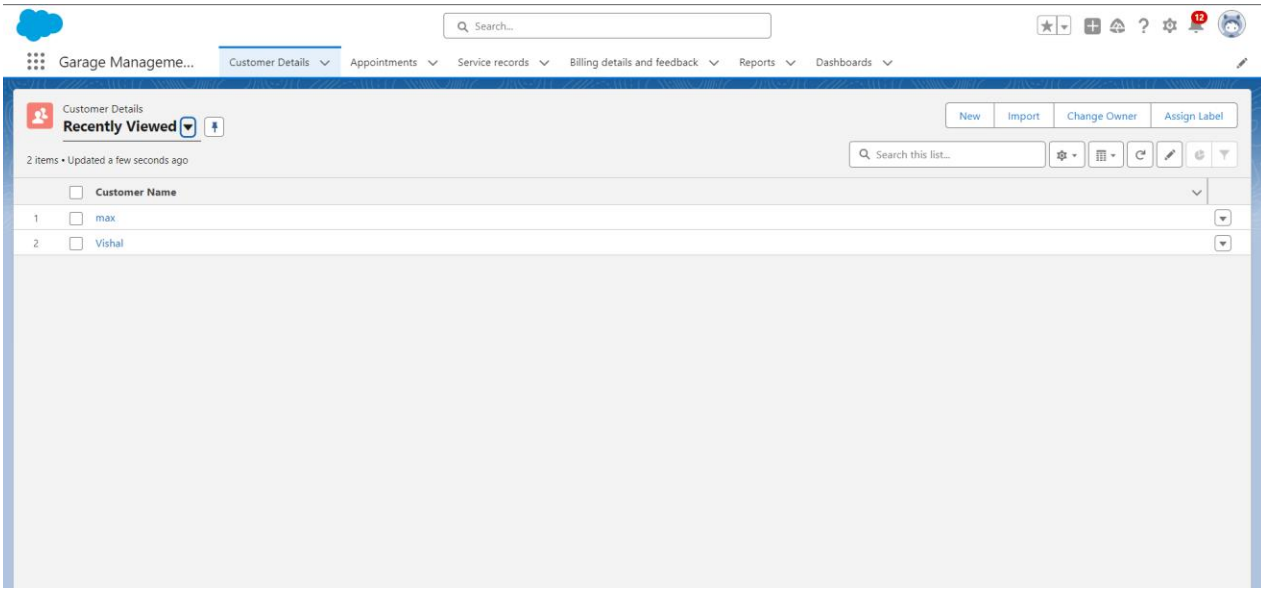
Salesforce.com, inc. The Landmark at One Market, Suite 300, San Francisco, CA, 94105, United States

Activity 2: Account Activation

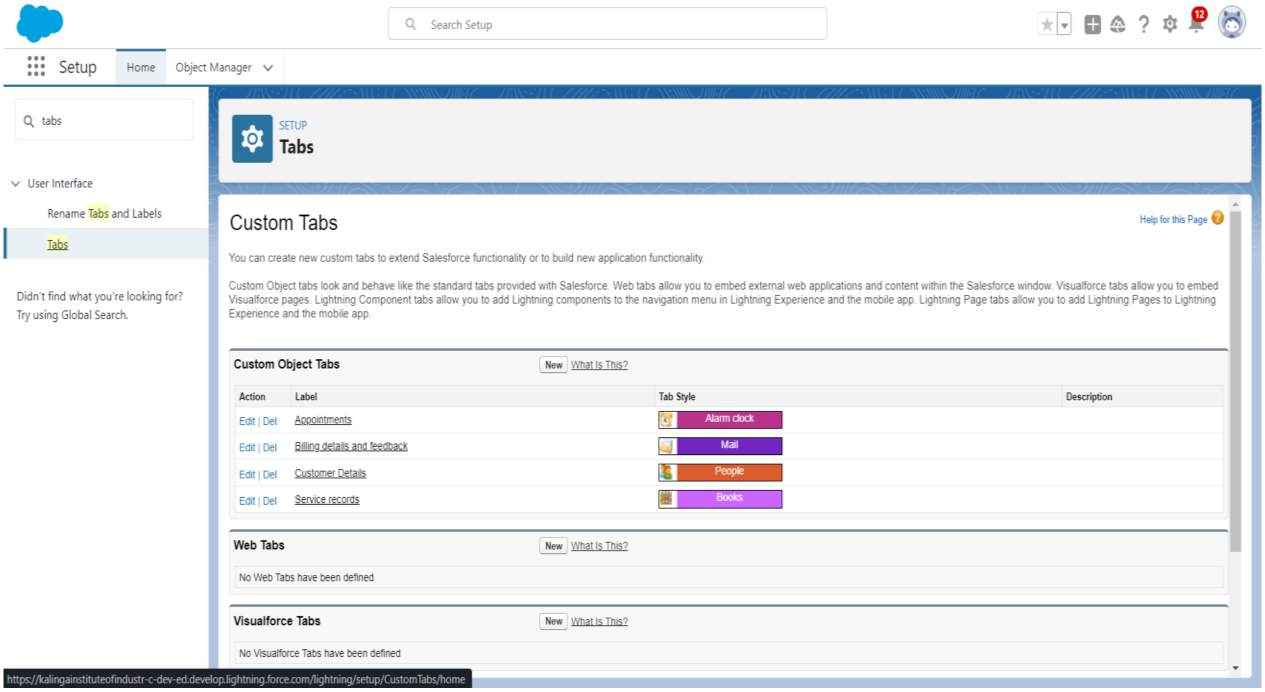
Task 2: Object



		Customer Name
1	☐	max
2	☐	Vishal

Activity - Create 4 objects with label names as Customer Details, Appointments, Service Records, Billing Details and Feedback.

Task 3: Tabs



Custom Tabs

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. Web tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Custom Object Tabs New What Is This?

Action	Label	Tab Style	Description
Edit | Del	Appointments	Alarm clock	
Edit | Del	Billing details and feedback	Mail	
Edit | Del	Customer Details	People	
Edit | Del	Service records	Books	

Web Tabs New What Is This?

No Web Tabs have been defined

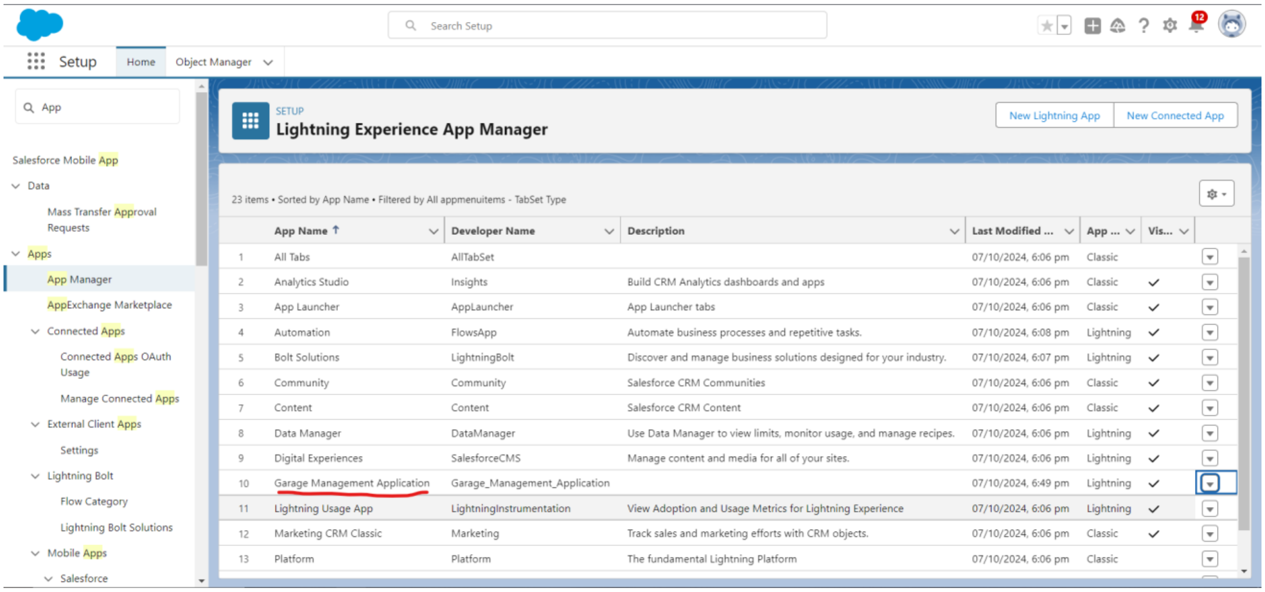
Visualforce Tabs New What Is This?

No Visualforce Tabs have been defined

https://kalingainstituteofindustr-c-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/home

Activity: Creating 4 Custom Tabs - Customer Details, Appointments, Service Records, Billing Details and Feedback.

Task 4: The Lightning App



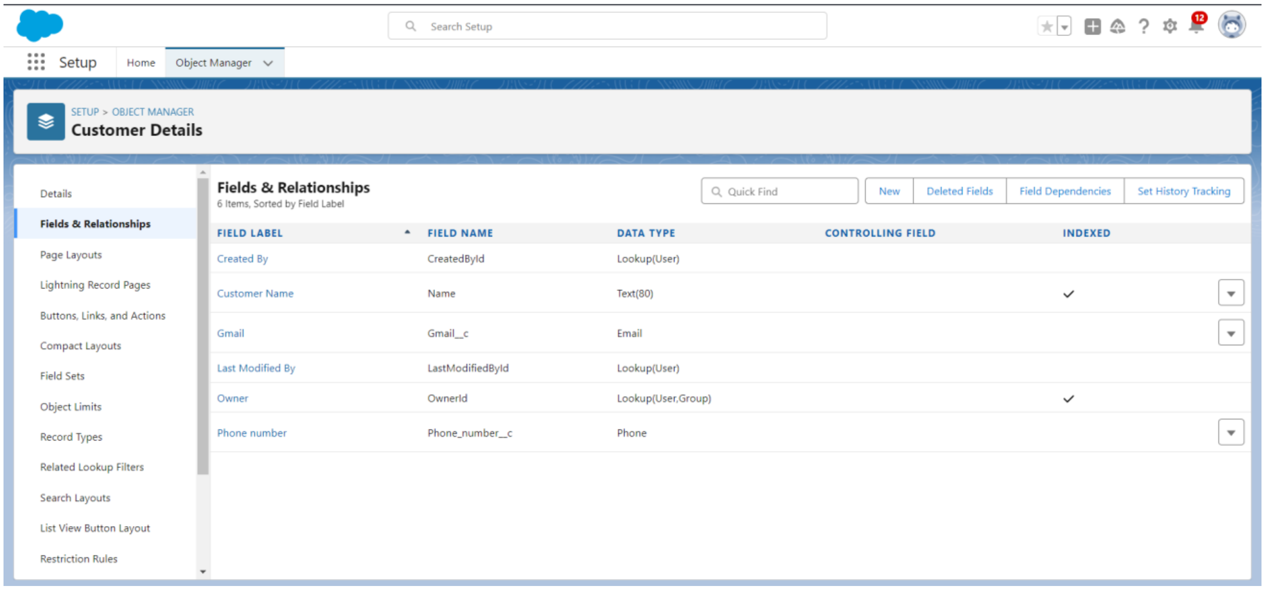
Lightning Experience App Manager

23 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type

	App Name ↑	Developer Name	Description	Last Modified ...	App ...	Vis...
1	All Tabs	AllTabSet		07/10/2024, 6:06 pm	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	07/10/2024, 6:06 pm	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	07/10/2024, 6:06 pm	Classic	✓
4	Automation	FlowsApp	Automate business processes and repetitive tasks.	07/10/2024, 6:08 pm	Lightning	✓
5	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	07/10/2024, 6:07 pm	Lightning	✓
6	Community	Community	Salesforce CRM Communities	07/10/2024, 6:06 pm	Classic	✓
7	Content	Content	Salesforce CRM Content	07/10/2024, 6:06 pm	Classic	✓
8	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	07/10/2024, 6:06 pm	Lightning	✓
9	Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	07/10/2024, 6:06 pm	Lightning	✓
10	Garage Management Application	Garage_Management_Application		07/10/2024, 6:49 pm	Lightning	✓
11	Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	07/10/2024, 6:06 pm	Lightning	✓
12	Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	07/10/2024, 6:06 pm	Classic	✓
13	Platform	Platform	The fundamental Lightning Platform	07/10/2024, 6:06 pm	Classic	

Activity : Create a Lightning App – Garage Management Application

Task 5: Fields & Relationships



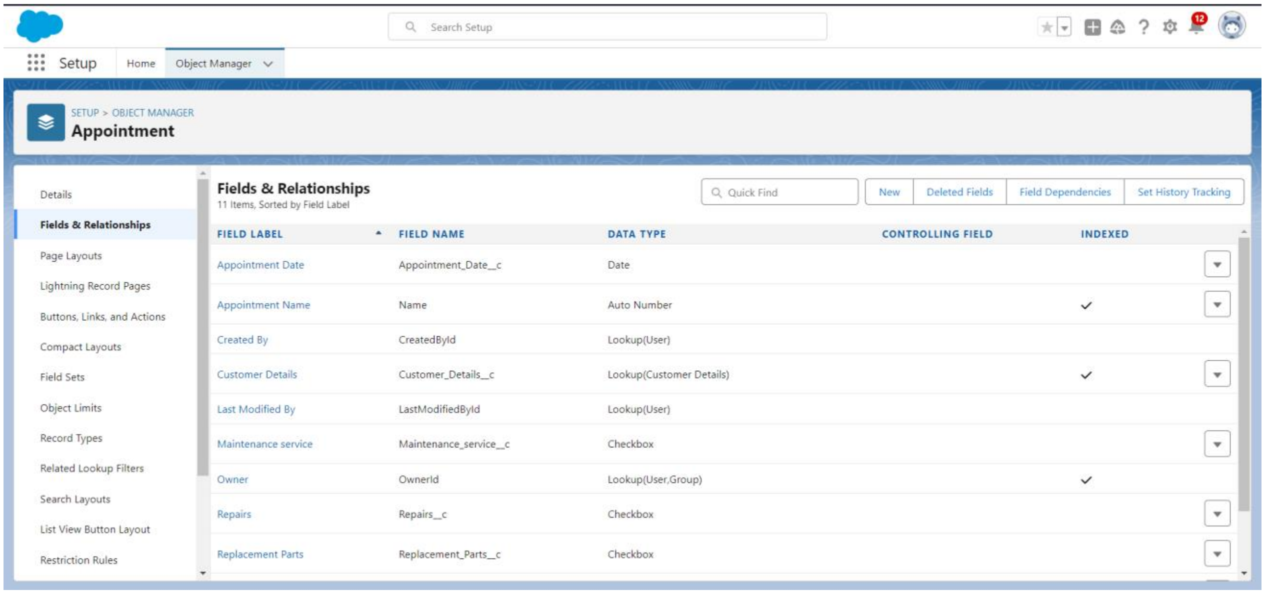
Customer Details

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 number	Phone_number__c	Phone		

Activity: Creating fields in Customer Details object



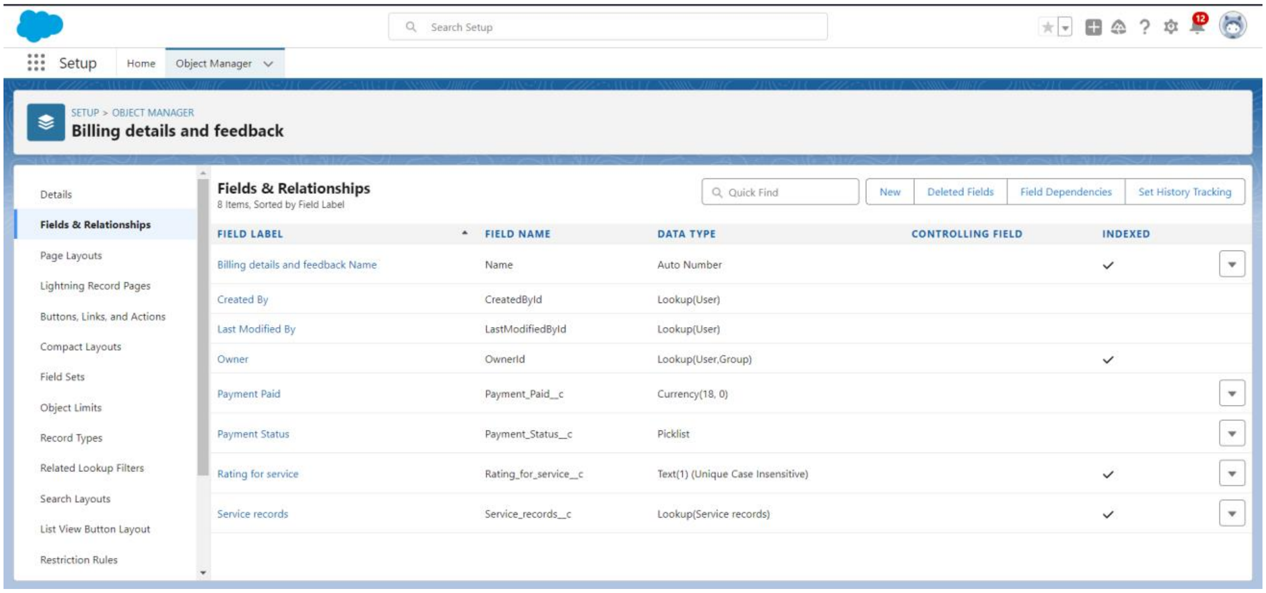
Appointment

Fields & Relationships

11 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	Replacement_Parts__c	Checkbox		

Activity: creating fields in Appointment object

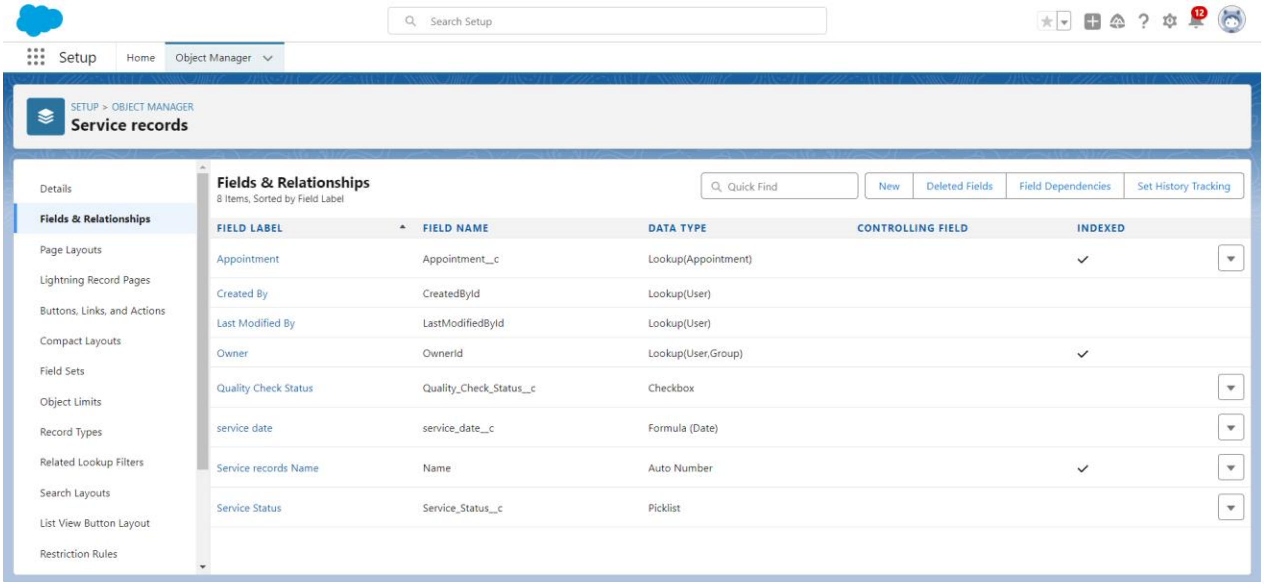


Billing details and feedback

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	Currency(18, 0)		
Payment Status	Payment_Status__c	Picklist		
Rating for service	Rating_for_service__c	Text(1) (Unique Case Insensitive)		✓
Service records	Service_records__c	Lookup(Service records)		✓

Activity: creating fields in Billing Details and Feedback object



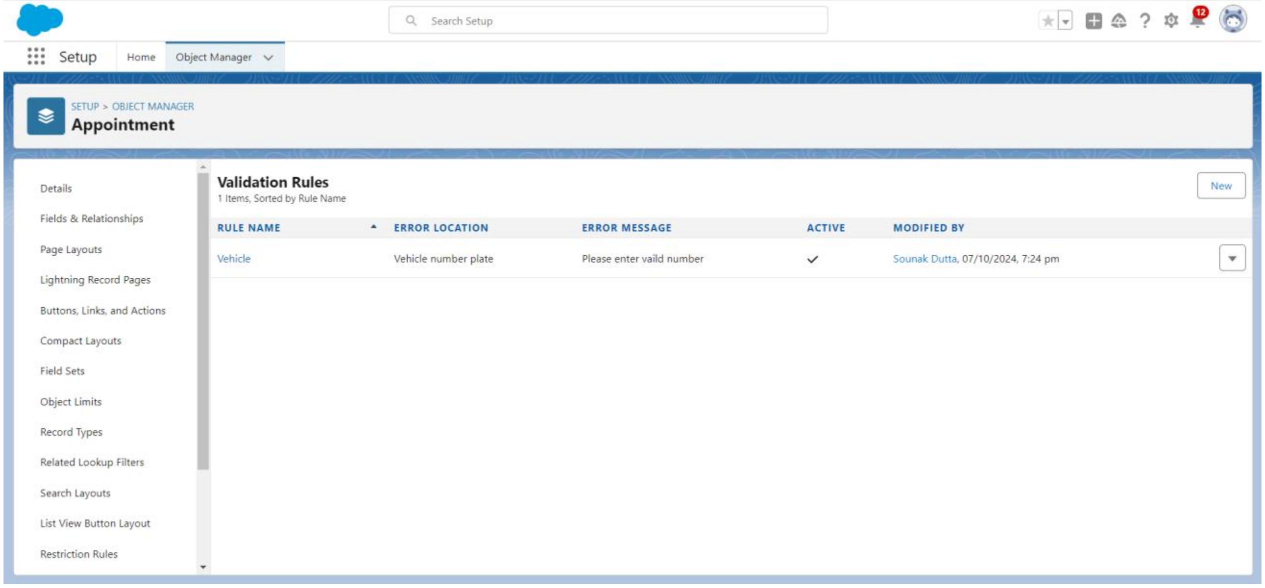
Service records

Fields & Relationships
8 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment	Appointment__c	Lookup(Appointment)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
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		

Activity: creating fields in Service Records object.

Task 6: Validation Rule



SETUP > OBJECT MANAGER

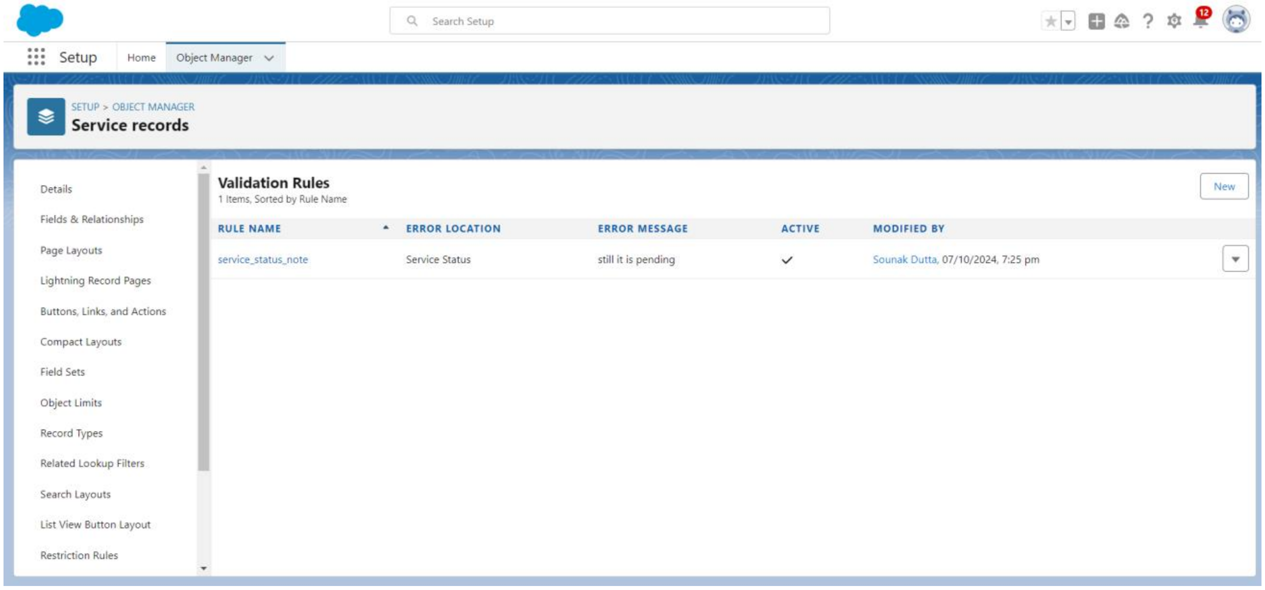
Appointment

Validation Rules

1 Items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Vehicle	Vehicle number plate	Please enter vaild number	✓	Sounak Dutta, 07/10/2024, 7:24 pm

Activity: Creating Validation Rule for Appointment Object



SETUP > OBJECT MANAGER

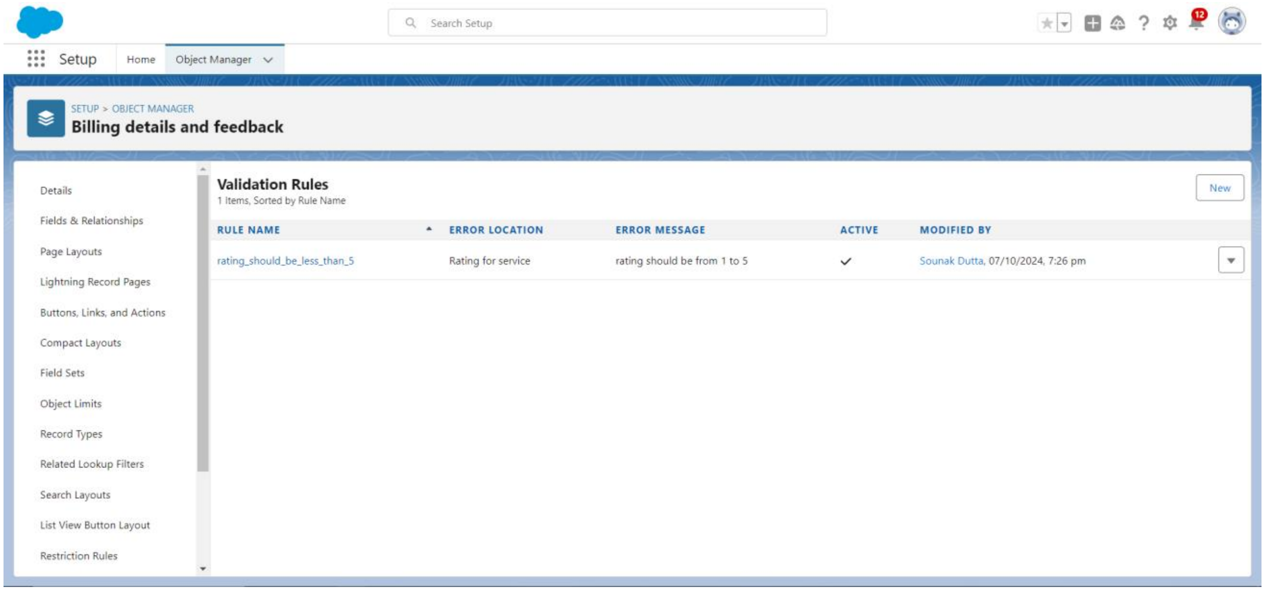
Service records

Validation Rules

1 Items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
service_status_note	Service Status	still it is pending	✓	Sounak Dutta, 07/10/2024, 7:25 pm

Activity: Creating Validation Rule for Service Record Object



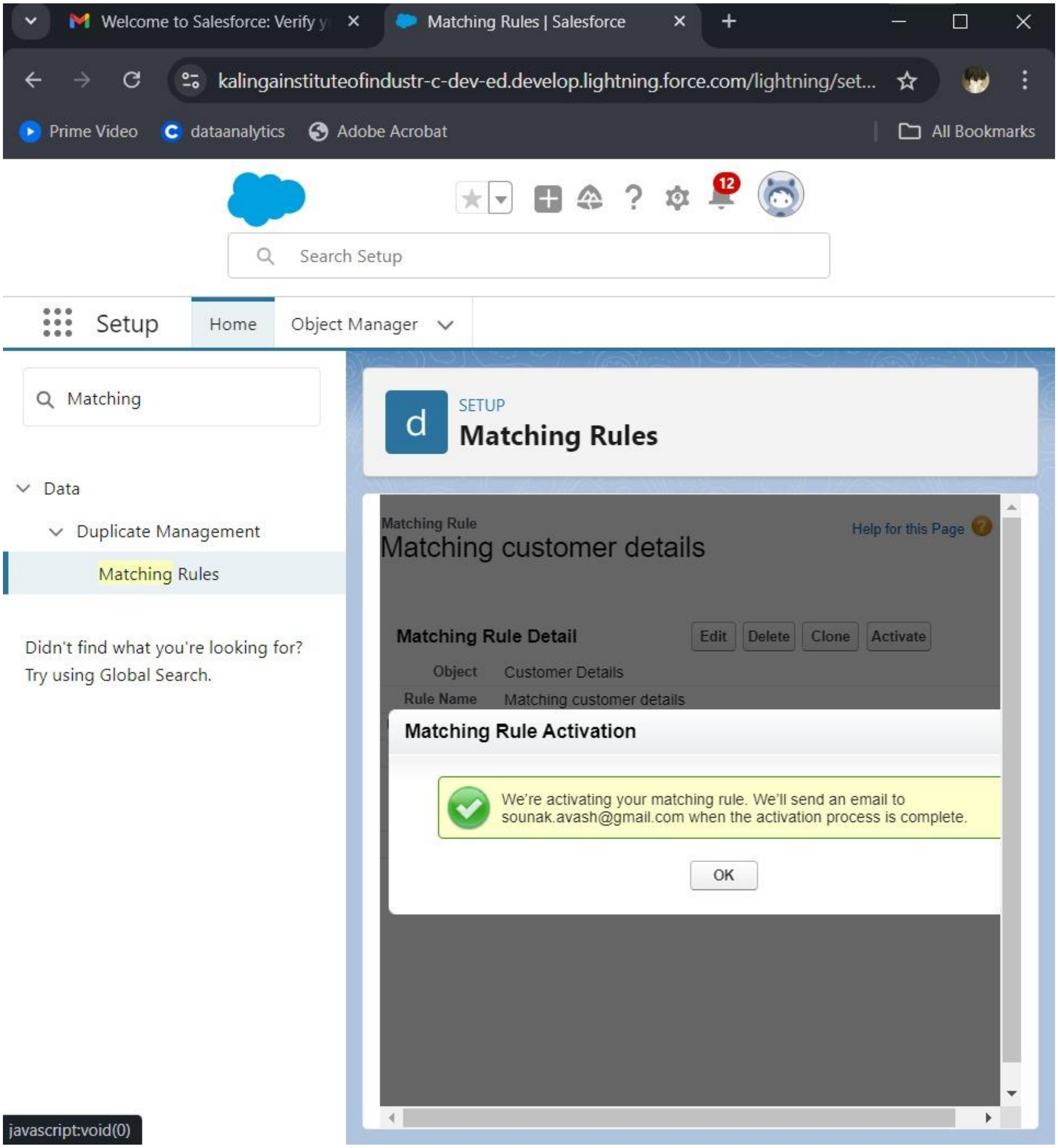
Validation Rules

1 Items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
rating_should_be_less_than_5	Rating for service	rating should be from 1 to 5	✓	Sounak Dutta, 07/10/2024, 7:26 pm

Activity: Creating Validation Rule for Service Record Object

Task 7: Duplicate Rule



Matching Rule

Matching customer details

Matching Rule Detail

Object Customer Details

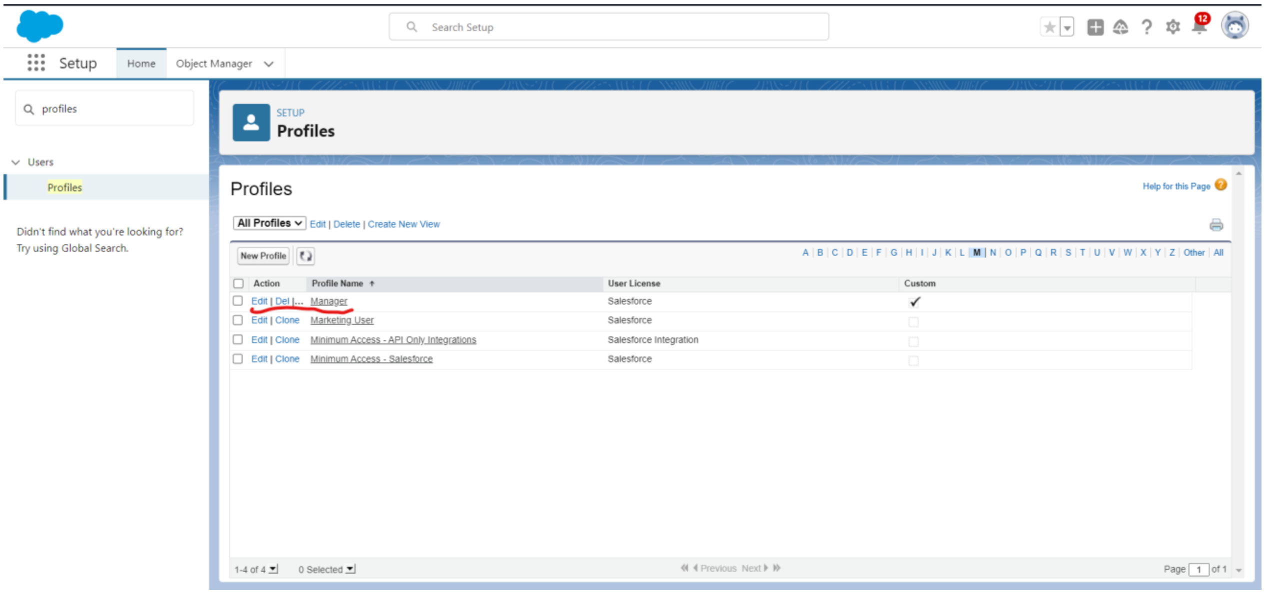
Rule Name Matching customer details

Matching Rule Activation

We're activating your matching rule. We'll send an email to sounak.avash@gmail.com when the activation process is complete.

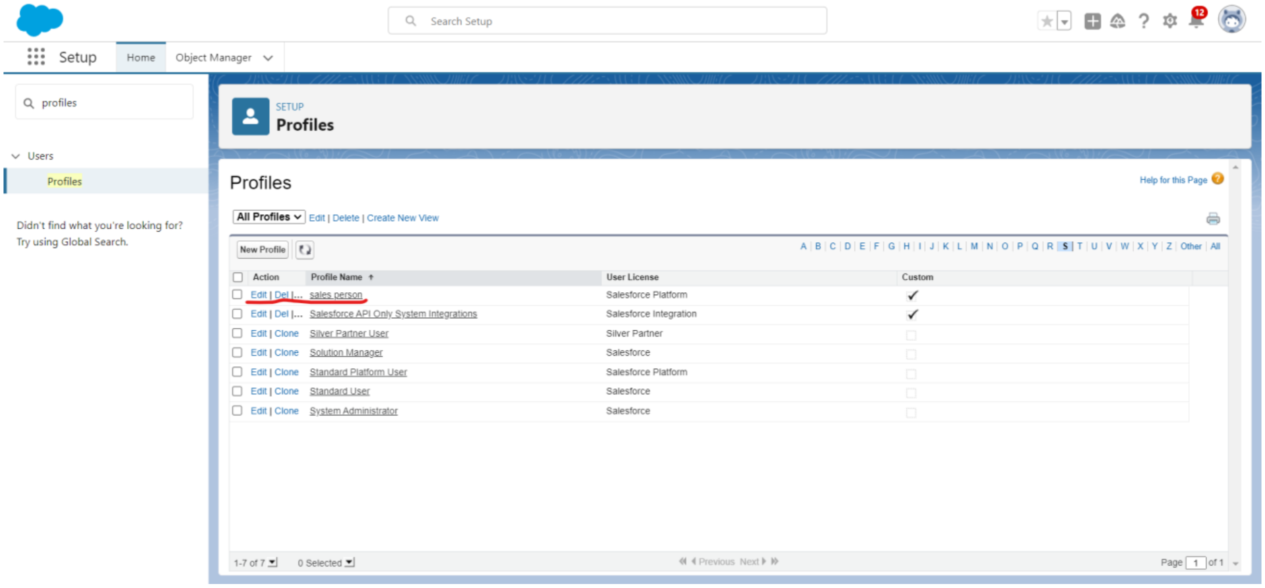
Activity: Making a Duplicate Rule and Activating it

Task 8: Profiles



Profiles

☐	Action	Profile Name	User License	Custom
☐	Edit | Del |...	Manager	Salesforce	✓
☐	Edit | Clone	Marketing User	Salesforce	☐
☐	Edit | Clone	Minimum Access - API Only Integrations	Salesforce Integration	☐
☐	Edit | Clone	Minimum Access - Salesforce	Salesforce	☐

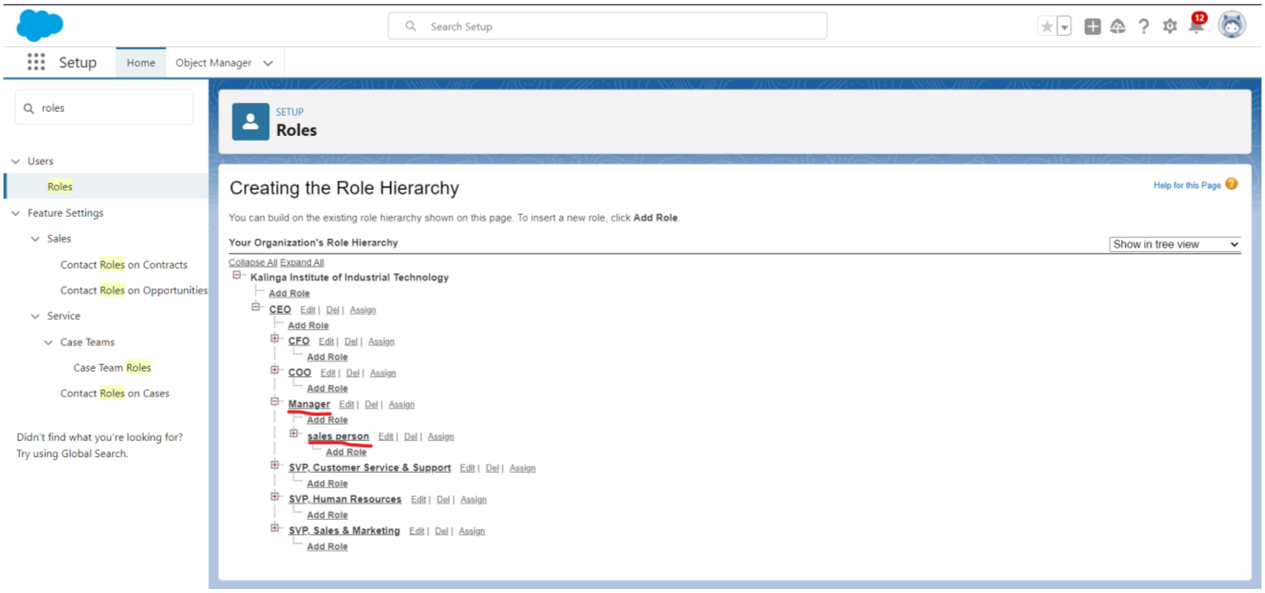


Profiles

☐	Action	Profile Name	User License	Custom
☐	Edit | Del |...	sales person	Salesforce Platform	✓
☐	Edit | Del |...	Salesforce API Only System Integrations	Salesforce Integration	✓
☐	Edit | Clone	Silver Partner User	Silver Partner	☐
☐	Edit | Clone	Solution Manager	Salesforce	☐
☐	Edit | Clone	Standard Platform User	Salesforce Platform	☐
☐	Edit | Clone	Standard User	Salesforce	☐
☐	Edit | Clone	System Administrator	Salesforce	☐

Creating profiles: Manager and Sales Person

Task 9: Roles and Roles Hierarchy



Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

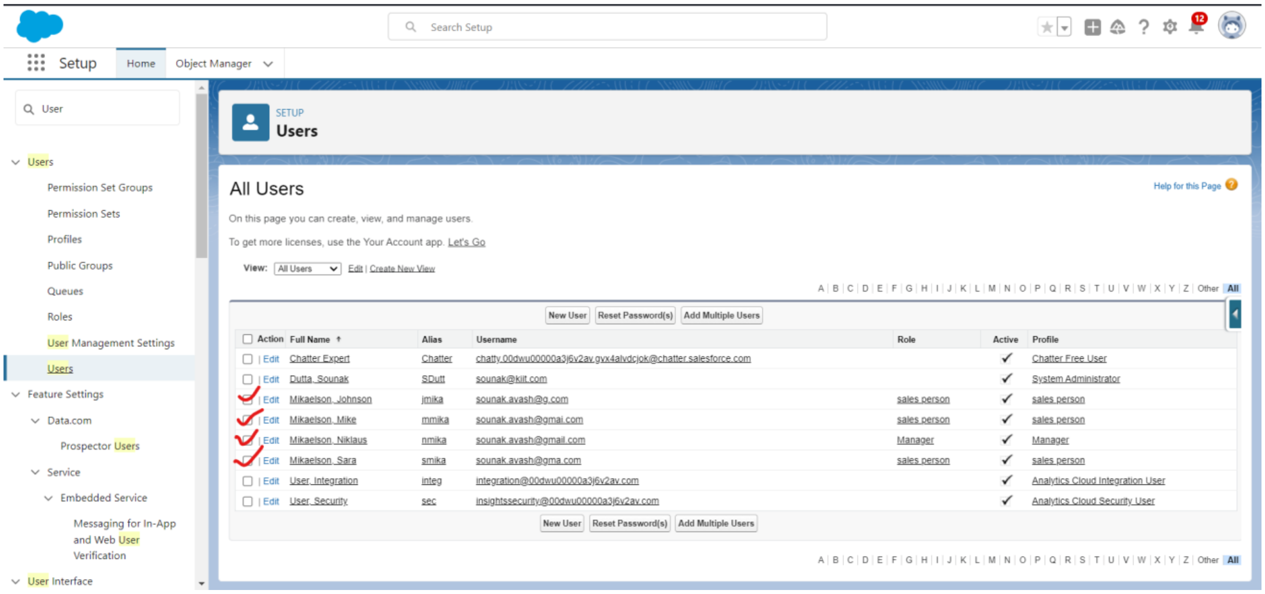
Your Organization's Role Hierarchy

Collapse All Expand All

- Kalinga Institute of Industrial Technology
  - Add Role
  - CEO Edit | Del | Assign
    - Add Role
    - CFO Edit | Del | Assign
      - Add Role
    - COO Edit | Del | Assign
      - Add Role
    - Manager Edit | Del | Assign
      - Add Role
      - sales person Edit | Del | Assign
        - Add Role
    - SVP, Customer Service & Support Edit | Del | Assign
      - Add Role
    - SVP, Human Resources Edit | Del | Assign
      - Add Role
    - SVP, Sales & Marketing Edit | Del | Assign
      - Add Role

Activity: Assigning Roles: Sales Person reporting to Manager

Task 10: User



All Users

On this page you can create, view, and manage users.

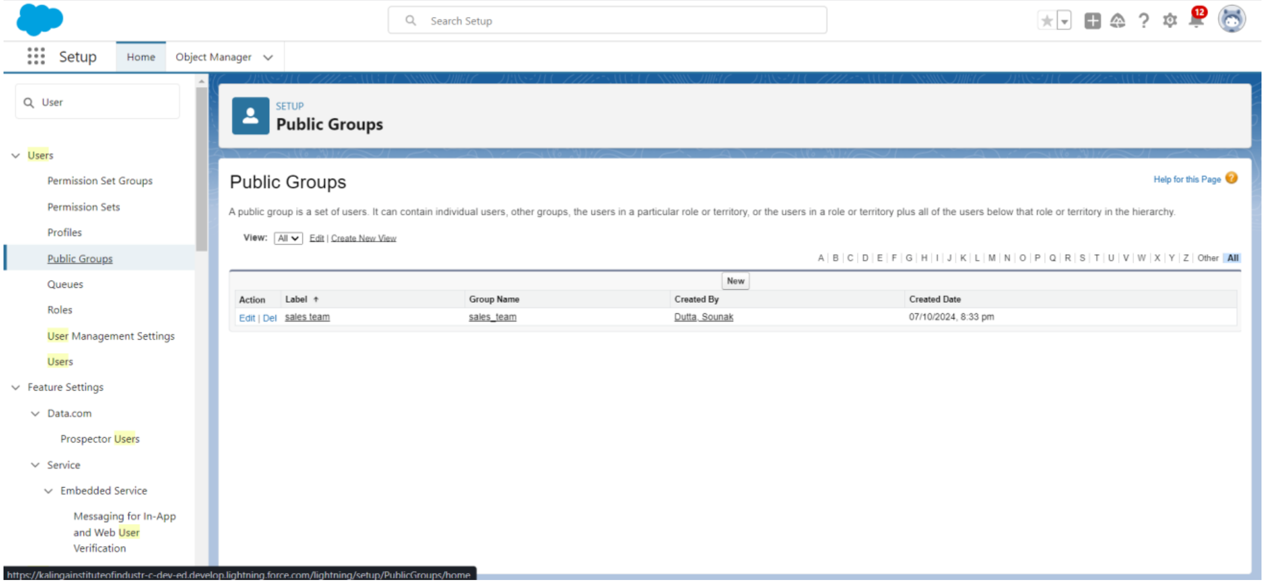
To get more licenses, use the Your Account app. Let's Go

View: All Users | Edit | Create New View

☐ Action	Full Name ↑	Alias	Username	Role	Active	Profile
☐ | Edit	Chatter Expert	Chatter	chatty.00dwu00000a3j6v2av.gyx4alvdcjok@chatter.salesforce.com		✓	Chatter Free User
☐ | Edit	Dutta, Sounak	SDutt	sounak@kiit.com		✓	System Administrator
☑ | Edit	Mikaelson, Johnson	jmika	sounak.avash@g.com	sales person	✓	sales person
☑ | Edit	Mikaelson, Mike	mmika	sounak.avash@gmai.com	sales person	✓	sales person
☑ | Edit	Mikaelson, Niklaus	nmika	sounak.avash@gmail.com	Manager	✓	Manager
☑ | Edit	Mikaelson, Sara	smika	sounak.avash@gma.com	sales person	✓	sales person
☐ | Edit	User, Integration	integ	integration@00dwu00000a3j6v2av.com		✓	Analytics Cloud Integration User
☐ | Edit	User, Security	sec	insightssecurity@00dwu00000a3j6v2av.com		✓	Analytics Cloud Security User

Activity: Creating Users: (Highlighted above)

Task 11: Public Group



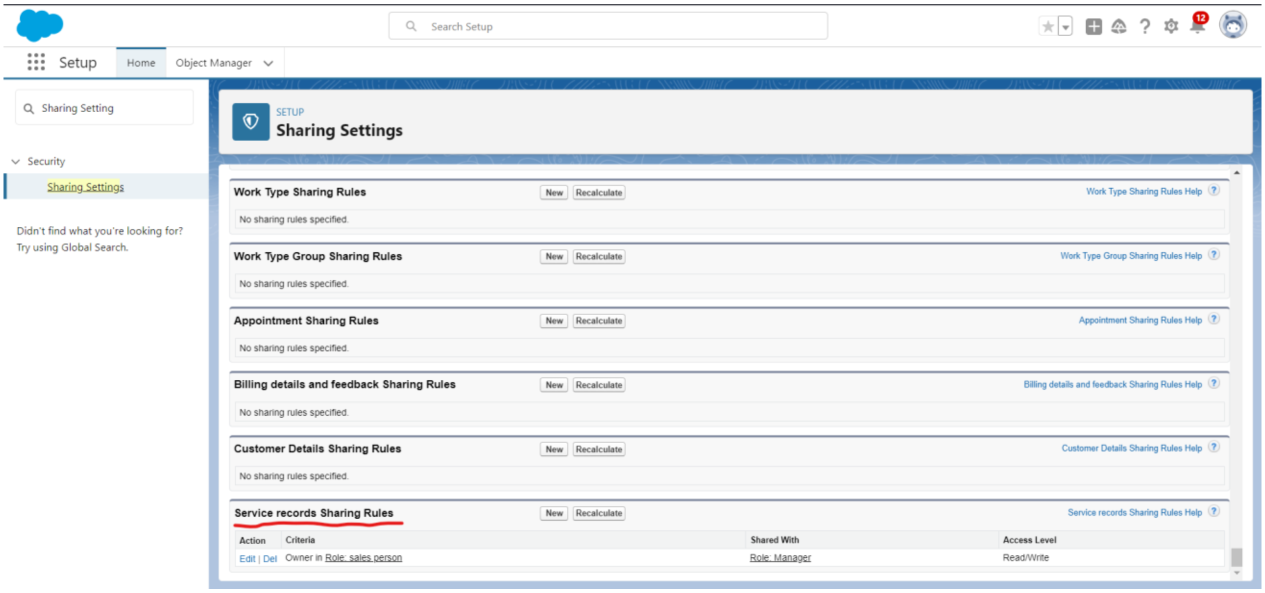
Public Groups

A public group is a set of users. It can contain individual users, other groups, the users in a particular role or territory, or the users in a role or territory plus all of the users below that role or territory in the hierarchy.

Action	Label ↑	Group Name	Created By	Created Date
Edit | Del	sales team	sales_team	Dutta, Sounak	07/10/2024, 8:33 pm

Activity: creating a Public group as Sales Team

Task 12: Sharing Settings



Work Type Sharing Rules

No sharing rules specified.

Work Type Group Sharing Rules

No sharing rules specified.

Appointment Sharing Rules

No sharing rules specified.

Billing details and feedback Sharing Rules

No sharing rules specified.

Customer Details Sharing Rules

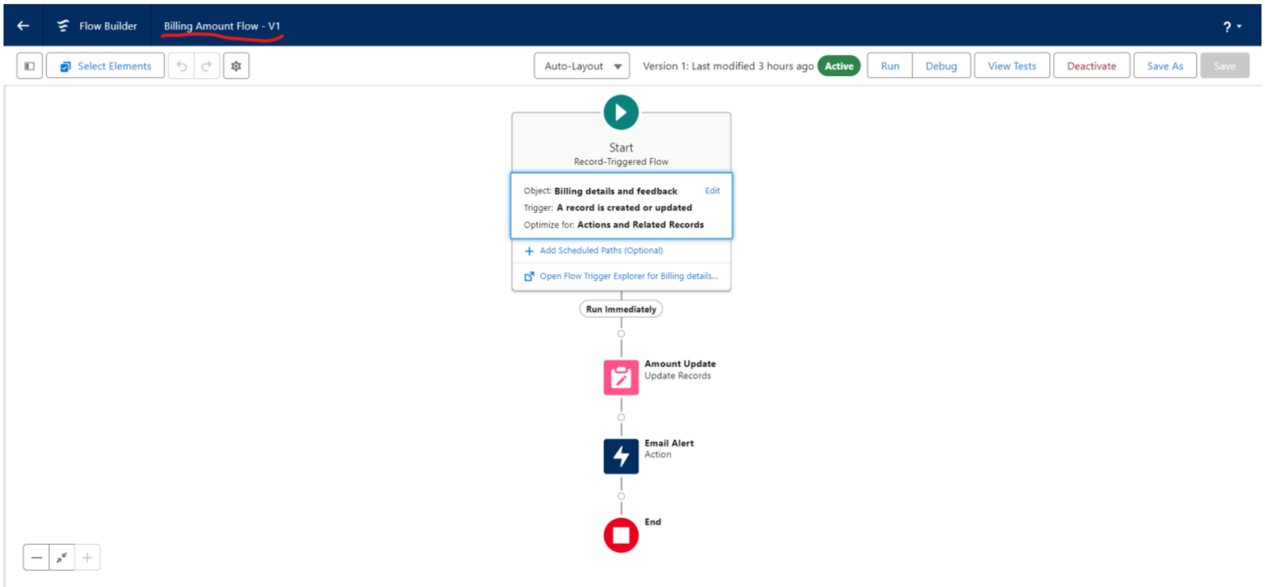
No sharing rules specified.

Service records Sharing Rules

Action	Criteria	Shared With	Access Level
Edit | Del	Owner in Role: sales person	Role: Manager	Read/Write

Activity: Creating a Sharing Setting and Making Service Record as private

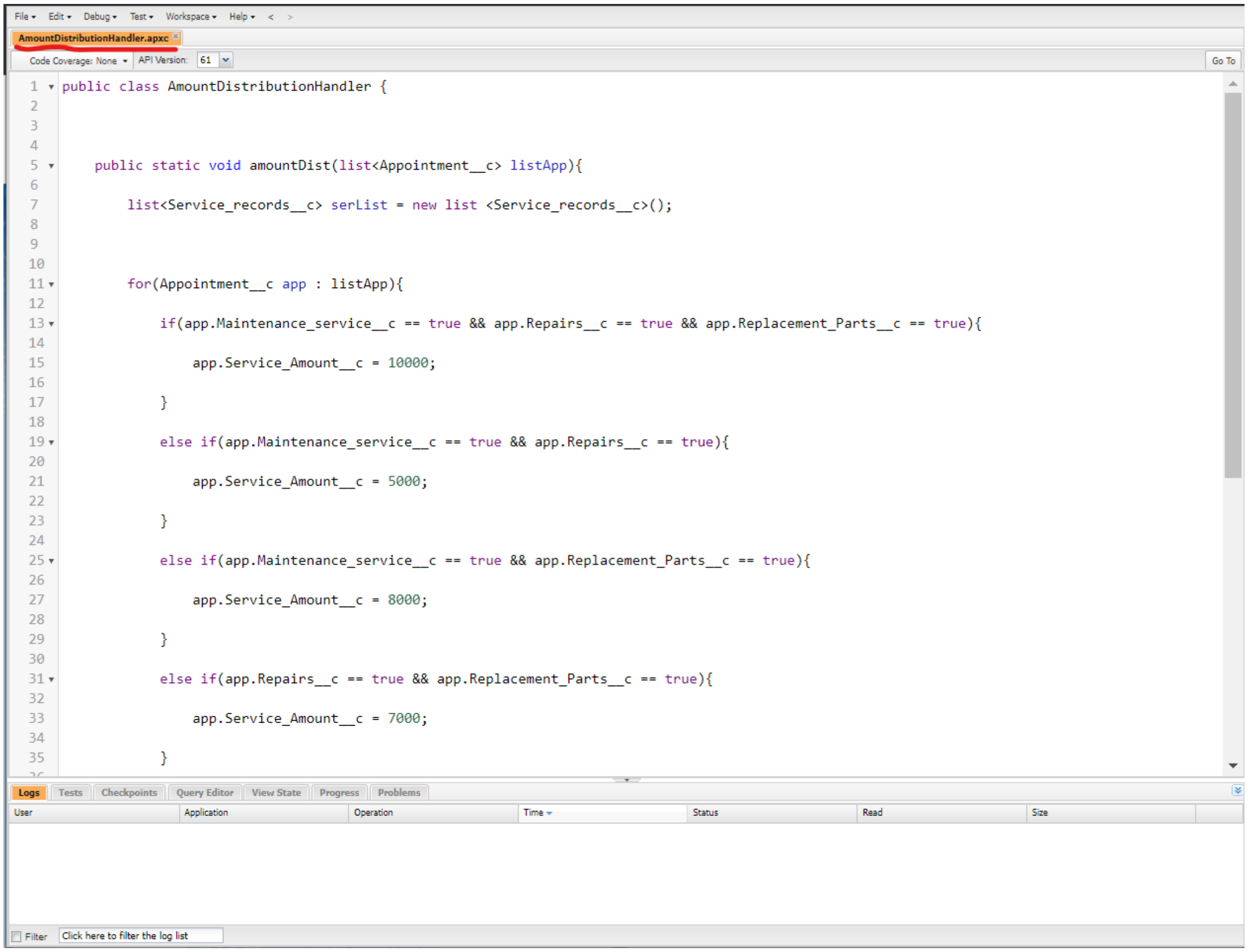
Task 13: Flows



Object: **Billing details and feedback**
Trigger: **A record is created or updated**
Optimize for: **Actions and Related Records**

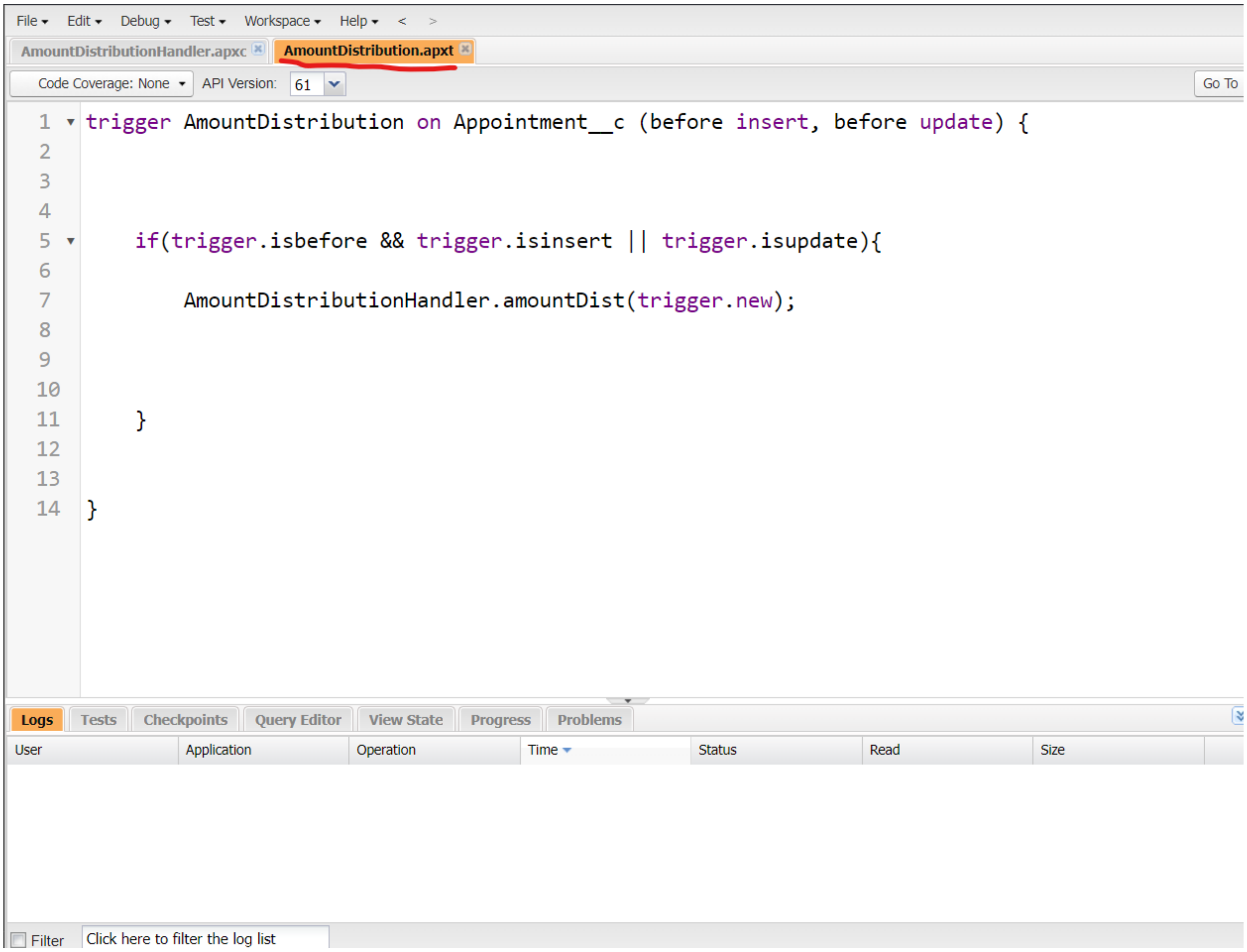
Activity: Creating a Flow named as Billing Amount Flow

Task 14: Apex Trigger



```
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.Replacement_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.Replacement_Parts__c == true){

                app.Service_Amount__c = 8000;

            }

            else if(app.Repairs__c == true && app.Replacement_Parts__c == true){

                app.Service_Amount__c = 7000;

            }
```

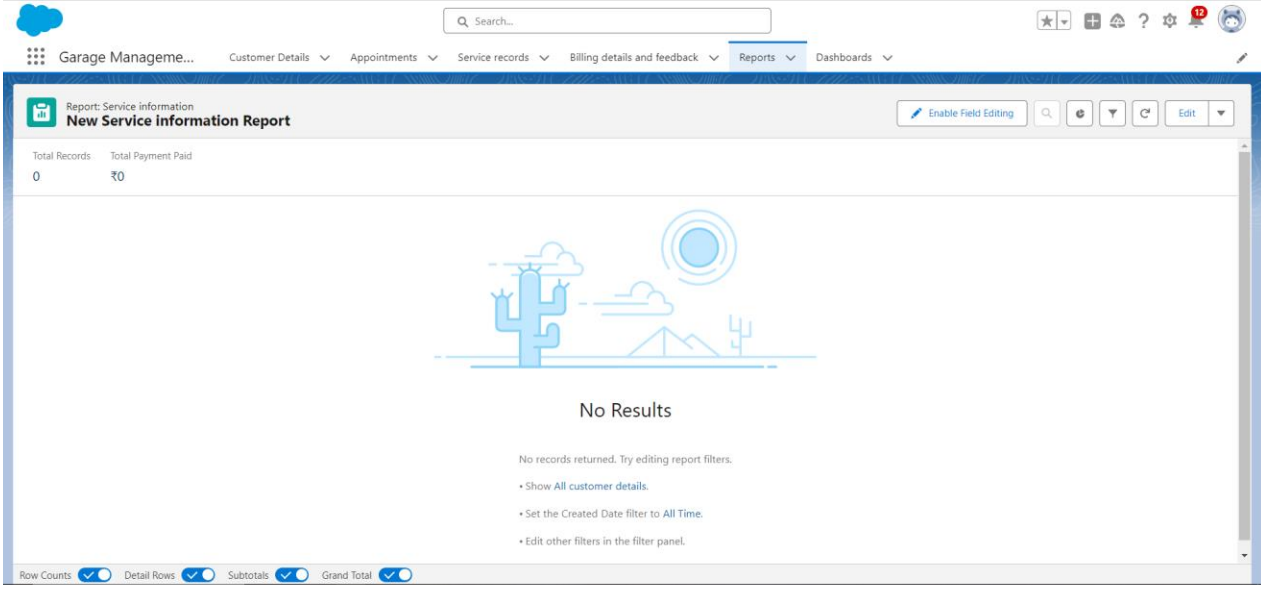
Activity: Creating a Apex Class named as AmountdistributionHandler



```
trigger AmountDistribution on Appointment__c (before insert, before update) {



    if(trigger.isbefore && trigger.isinsert || trigger.isupdate){

        AmountDistributionHandler.amountDist(trigger.new);



    }


}
```

Activity: Creating a Apex Trigger named as Amountdistribution

Task 15: Reports



Report: Service information

New Service information Report

Total Records	Total Payment Paid
0	₹0

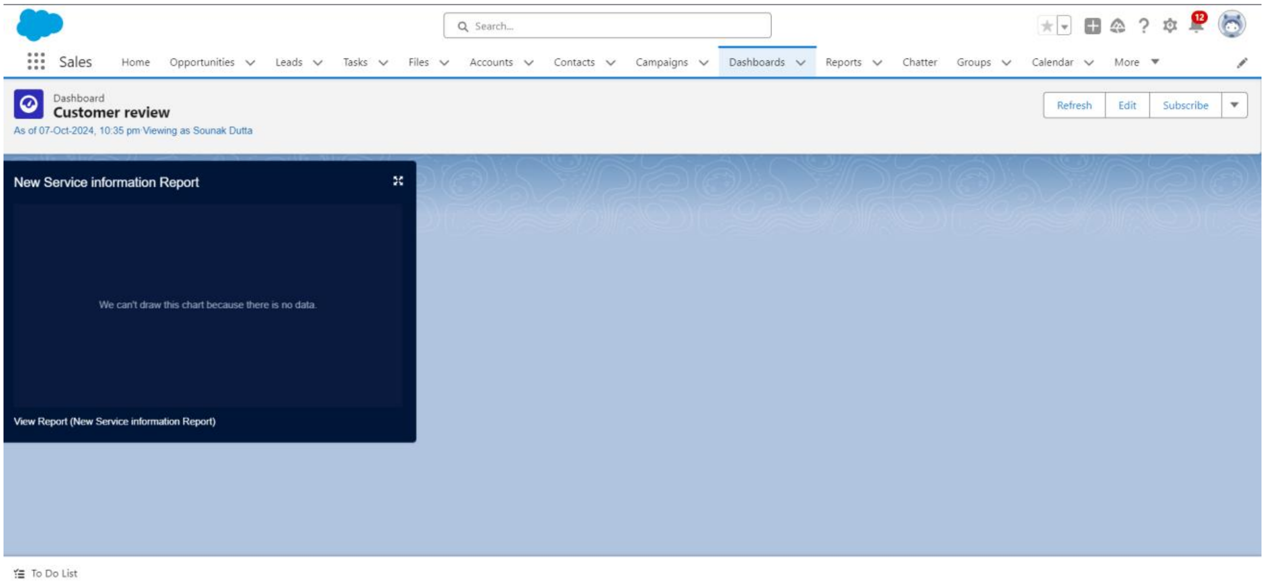
No Results

No records returned. Try editing report filters.

- Show All customer details.
- Set the Created Date filter to All Time.
- Edit other filters in the filter panel.

Activity: Create Report – for the Appointments (No result because data was not given)

Task 16: Dashboards



Dashboard
Customer review
As of 07-Oct-2024, 10:35 pm Viewing as Sounak Dutta

New Service information Report

We can't draw this chart because there is no data.

View Report (New Service information Report)

Activity 1: Create Dashboard (No data was given that's null dashboard)

Thank You