

# WORKFORCE ADMINISTRATION SOLUTION

By

Sounak Dutta

Email - [2105582@kiit.ac.in](mailto:2105582@kiit.ac.in)

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.

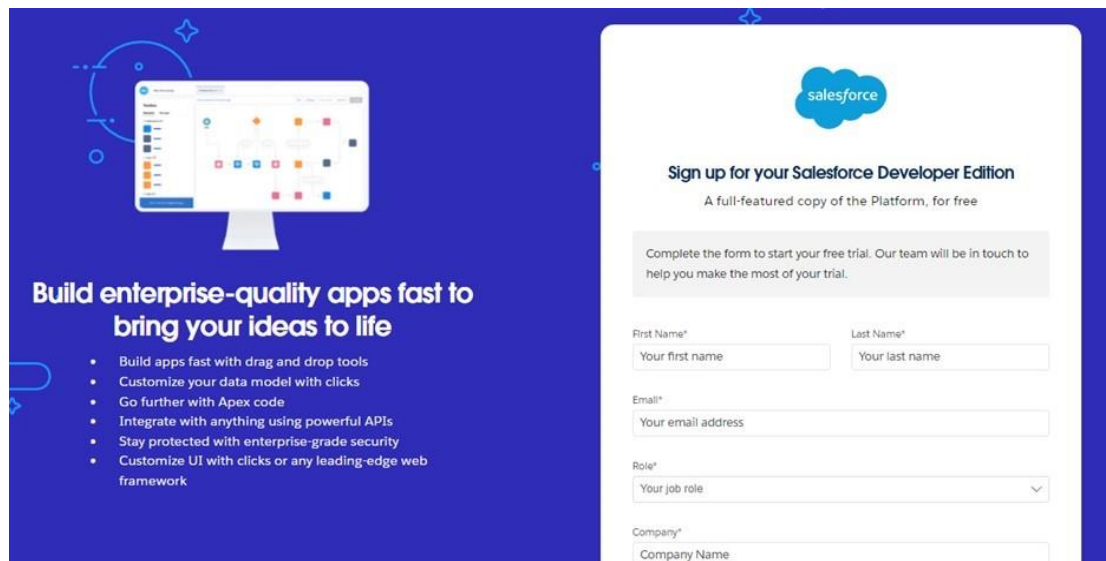
## INDEX Page

Topics		Page no
Salesforce	-----	01
Object	-----	02
Tabs	-----	03
The Lightning App	-----	04
Fields & Relationships	-----	05
Validation Rule	-----	07
Duplicate Rule	-----	09
Profile	-----	10
Role and Role Hierarchy	-----	11
User	-----	12
Public Group	-----	13
Sharing Settings	-----	14
Flows	-----	15
Apex Trigger	-----	16
Reports	-----	18
Dashboard	-----	19

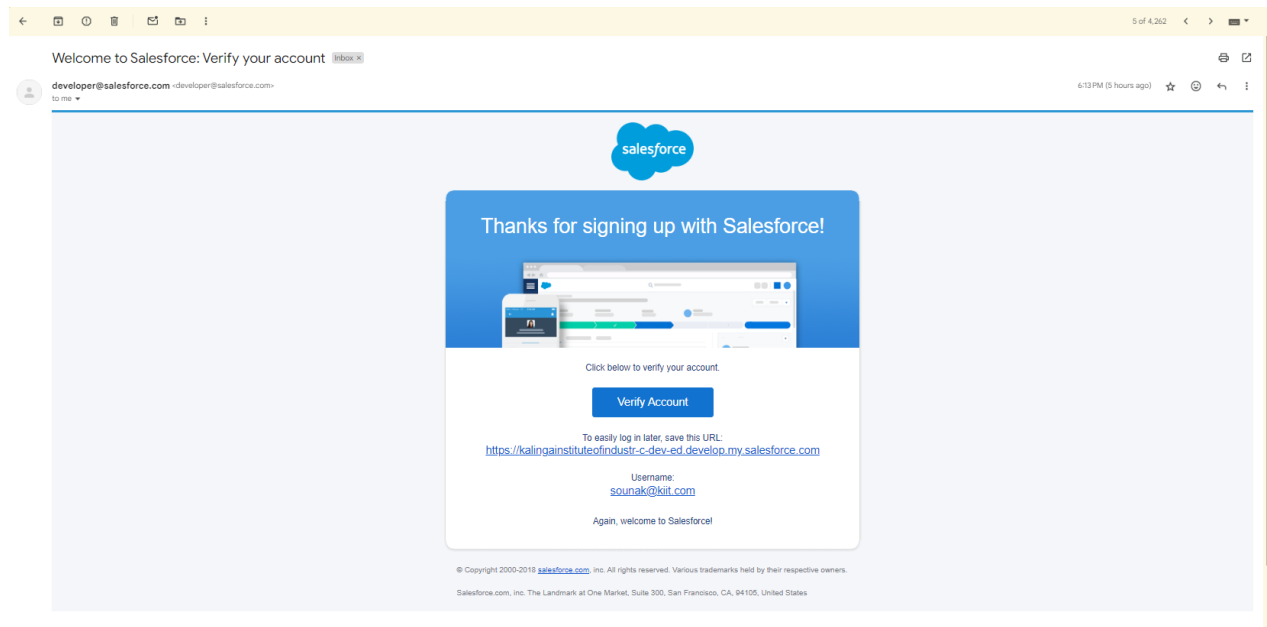
## INTRODUCTION

**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

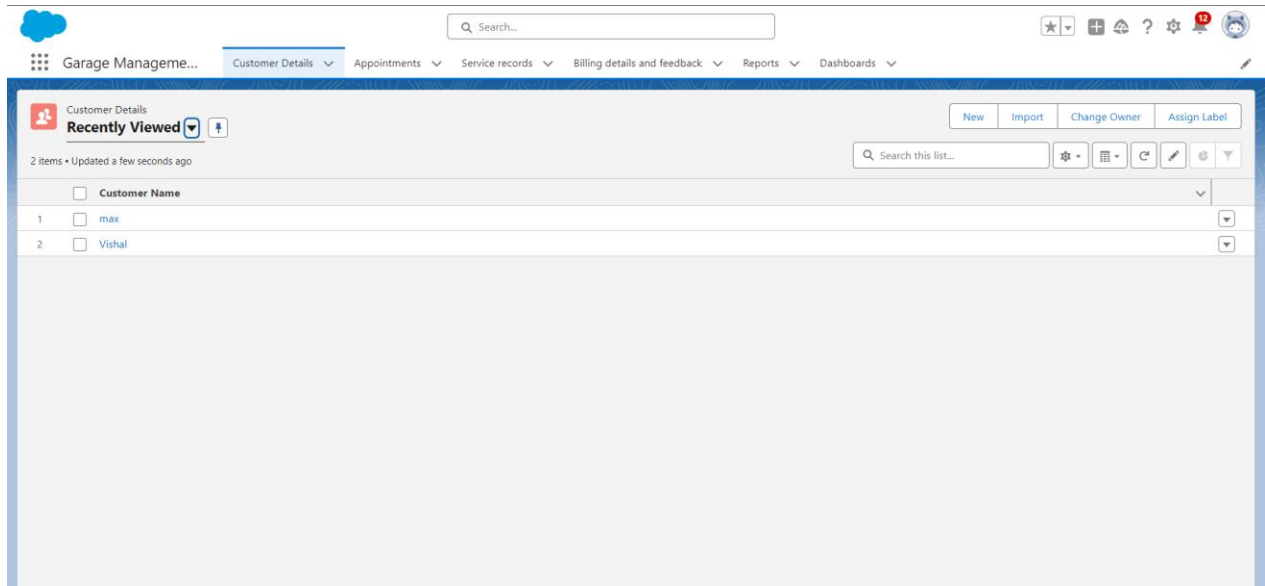


## Activity 1: Creating Developer Account



## Activity 2: Account Activation

## Task 2: Object



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

# Task 3: Tabs

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'tabs' entered and a list of navigation items under 'User Interface', with 'Tabs' selected. The main content area is titled 'Custom Tabs' and includes a 'Help for this Page' link. Below the title is an explanatory paragraph. The 'Custom Object Tabs' section contains a table with columns for Action, Label, Tab Style, and Description. It lists four tabs: 'Appointments' (Alarm clock icon), 'Billing details and feedback' (Mail icon), 'Customer Details' (People icon), and 'Service records' (Books icon). The 'Web Tabs' and 'Visualforce Tabs' sections both show 'No [type] Tabs have been defined'.

Setup Home Object Manager

Search Setup

tabs

User Interface

Rename Tabs and Labels

Tabs

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

## 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

Action	Label	Tab Style	Description
<a href="#">Edit</a>   <a href="#">Del</a>	Appointments	Alarm clock	
<a href="#">Edit</a>   <a href="#">Del</a>	Billing details and feedback	Mail	
<a href="#">Edit</a>   <a href="#">Del</a>	Customer Details	People	
<a href="#">Edit</a>   <a href="#">Del</a>	Service records	Books	

### Web Tabs

No Web Tabs have been defined

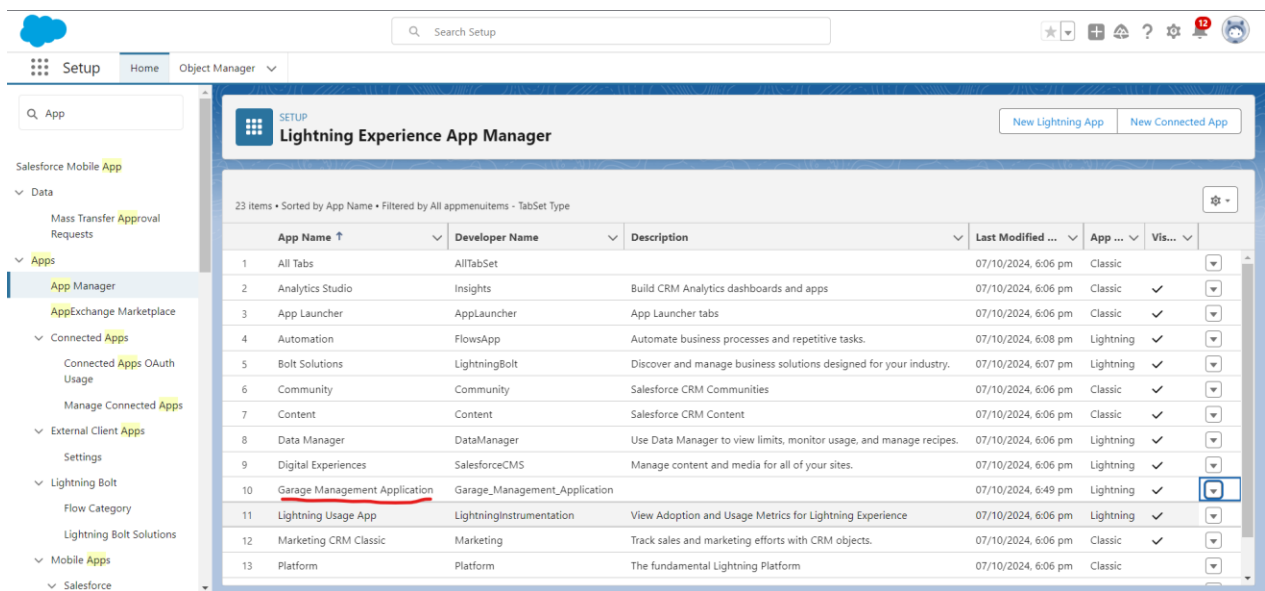
### Visualforce Tabs

No Visualforce Tabs have been defined

<https://kalingainstituteofindustry-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



The screenshot shows the Salesforce Lightning Experience App Manager interface. The left sidebar contains a navigation menu with the following items: Setup, Home, Object Manager, App, Salesforce Mobile App, Data, Mass Transfer Approval Requests, Apps, App Manager (selected), AppExchange Marketplace, Connected Apps, Connected Apps OAuth Usage, Manage Connected Apps, External Client Apps, Settings, Lightning Bolt, Flow Category, Lightning Bolt Solutions, Mobile Apps, and Salesforce.

The main content area displays a table of 13 items, sorted by App Name and filtered by All appmenuitems - TabSet Type. The table has the following columns: App Name, Developer Name, Description, Last Modified, App, and Vis. The 'Garage Management Application' is highlighted in row 10, and its dropdown menu is open, showing options like 'New Lightning App' and 'New Connected App'.

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

The screenshot shows the Salesforce Setup interface for the 'Customer Details' object. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area displays a table of fields for the 'Customer Details' object, sorted by Field Label. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. There are 6 items listed.

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

The screenshot shows the Salesforce Setup interface for the 'Appointment' object. The left sidebar lists various setup options, with 'Fields & Relationships' selected. The main content area displays a table of fields for the 'Appointment' object, sorted by Field Label. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. There are 11 items listed.

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



Setup > Object Manager > 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

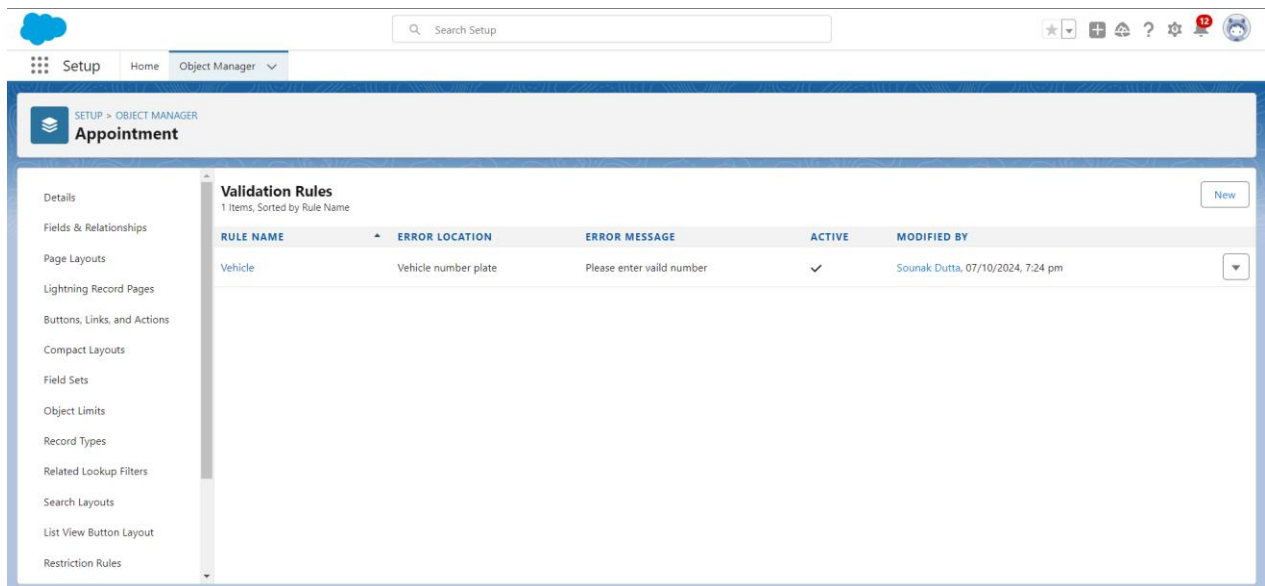
Setup > Object Manager > Service records

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.

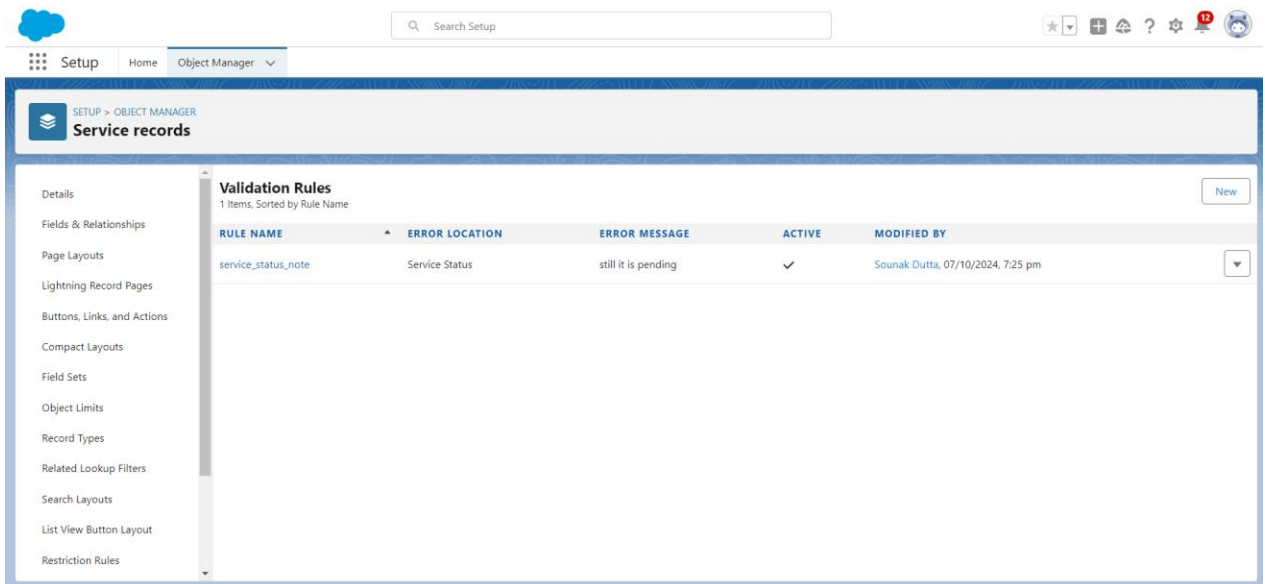
# Task 6: Validation Rule



The screenshot shows the Salesforce Setup interface for the Appointment object. The left sidebar lists various setup options, with 'Validation Rules' selected. The main content area displays a table of validation rules for the Appointment object. The table has five columns: RULE NAME, ERROR LOCATION, ERROR MESSAGE, ACTIVE, and MODIFIED BY. There is one rule listed: 'Vehicle' with an error location of 'Vehicle number plate' and an error message of 'Please enter valid number'. The rule is active and was modified by Sounak Dutta on 07/10/2024 at 7:24 pm.

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


## Activity: Creating Validation Rule for Appointment Object










The screenshot shows the Salesforce Setup interface for the Service records object. The left sidebar lists various setup options, with 'Validation Rules' selected. The main content area displays a table of validation rules for the Service records object. The table has five columns: RULE NAME, ERROR LOCATION, ERROR MESSAGE, ACTIVE, and MODIFIED BY. There is one rule listed: 'service\_status\_note' with an error location of 'Service Status' and an error message of 'still it is pending'. The rule is active and was modified by Sounak Dutta on 07/10/2024 at 7:25 pm.

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



Search Setup



Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Billing details and feedback

Details

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

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

New

Activity: Creating Validation Rule for Service Record Object

# Task 7: Duplicate Rule

The screenshot shows the Salesforce user interface. At the top, the browser address bar displays the URL: `kalingainstituteofindustr-c-dev-ed.develop.lightning.force.com/lightning/set...`. The Salesforce header includes the logo, a search bar labeled "Search Setup", and navigation tabs for "Setup", "Home", and "Object Manager".

In the left-hand navigation pane, the "Matching" section is expanded, showing "Data" and "Duplicate Management". Under "Duplicate Management", "Matching Rules" is selected and highlighted.

The main content area displays the "Matching Rules" setup page. The title "Matching Rules" is at the top. Below it, the "Matching Rule" section shows "Matching customer details". A "Matching Rule Detail" section includes buttons for "Edit", "Delete", "Clone", and "Activate". Below this, the "Matching Rule Activation" section features a green checkmark icon and a message: "We're activating your matching rule. We'll send an email to sounak.avash@gmail.com when the activation process is complete." An "OK" button is located at the bottom of this activation message.

At the bottom left of the image, there is a small black box containing the text: `javascript:void(0)`.

Activity: Making a Duplicate Rule and Activating it

# Task 8: Profiles

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'profiles' and a 'Profiles' link under the 'Users' section. The main content area is titled 'Profiles' and shows a list of profiles. The 'Manager' profile is highlighted with a red circle. The table has columns for Action, Profile Name, User License, and Custom.

Action	Profile Name	User License	Custom
<a href="#">Edit</a>   <a href="#">Delete</a>	Manager	Salesforce	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Marketing User	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Minimum Access - API Only Integrations	Salesforce Integration	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Minimum Access - Salesforce	Salesforce	<input type="checkbox"/>

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'profiles' and a 'Profiles' link under the 'Users' section. The main content area is titled 'Profiles' and shows a list of profiles. The 'sales person' profile is highlighted with a red circle. The table has columns for Action, Profile Name, User License, and Custom.

Action	Profile Name	User License	Custom
<a href="#">Edit</a>   <a href="#">Delete</a>	sales person	Salesforce Platform	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Delete</a>	Salesforce API Only System Integrations	Salesforce Integration	<input checked="" type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Silver Partner User	Silver Partner	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Solution Manager	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	Standard User	Salesforce	<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Clone</a>	System Administrator	Salesforce	<input type="checkbox"/>

Creating profiles: Manager and Sales Person

# Task 9: Roles and Roles Hierarchy

The screenshot displays the Salesforce Setup interface for the 'Roles' section. The left sidebar shows a navigation menu with 'Users' and 'Roles' (selected). The main content area is titled 'Creating the Role Hierarchy' and includes a search bar and a 'Show in tree view' dropdown. The role hierarchy is visualized as a tree structure for 'Kalinga Institute of Industrial Technology'. The hierarchy starts with 'CEO' at the top, followed by 'COO', 'Manager', 'Sales person', and 'SVP' roles. Each role has an 'Add Role' button next to it. The 'Manager' role is highlighted with a red box, and the 'Sales person' role is also highlighted with a red box. The 'SVP' roles are listed at the bottom of the hierarchy.

**Roles Hierarchy:**

- CEO
  - COO
    - Manager
      - Sales person
        - SVP Customer Service & Support
        - SVP Human Resources
        - SVP Sales & Marketing

Activity: Assigning Roles: Sales Person reporting to Manager

# Task 10: User

The screenshot shows the Salesforce Setup page for User Management. The left sidebar contains the navigation menu, and the main content area displays the 'All Users' page. The 'Edit' link for 'Mikaelson, Mike' is highlighted with a red checkmark.

**Navigation Menu:**

- Setup
- Home
- Object Manager
- Users
- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users
- Feature Settings
- Data.com
- Prospector Users
- Service
- Embedded Service
- Messaging for In-App and Web User Verification
- User Interface

**All Users Page:**

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
<input type="checkbox"/>   Edit	Chatter Expert	Chatter	chatter00000000a36v2av.gvxdalvdjpk@chatter.salesforce.com		✓	Chatter Free User
<input type="checkbox"/>   Edit	Dutta, Sounak	SDutt	sounak@kilt.com		✓	System Administrator
<input checked="" type="checkbox"/>   Edit	Mikaelson, Johnson	jmika	sounak.avash@q.com	sales person	✓	sales person
<input checked="" type="checkbox"/>   Edit	Mikaelson, Mike	mmika	sounak.avash@gmail.com	sales person	✓	sales person
<input checked="" type="checkbox"/>   Edit	Mikaelson, Niklaus	nmika	sounak.avash@gmail.com	Manager	✓	Manager
<input checked="" type="checkbox"/>   Edit	Mikaelson, Sara	smika	sounak.avash@gmail.com	sales person	✓	sales person
<input type="checkbox"/>   Edit	User Integration	integ	integration@00000000a36v2av.com		✓	Analytics Cloud Integration User
<input type="checkbox"/>   Edit	User Security	sec	insightsecurity@00000000a36v2av.com		✓	Analytics Cloud Security User

Buttons: New User | Reset Password(s) | Add Multiple Users

Activity: Creating Users: (Highlighted above)

# Task 11: Public Group

The screenshot displays the Salesforce Setup interface for Public Groups. The left sidebar contains a navigation menu with the following items: Setup, Home, Object Manager, Users, Permission Set Groups, Permission Sets, Profiles, Public Groups (selected), Queues, Roles, User Management Settings, Users, Feature Settings, Data.com, Prospector Users, Service, Embedded Service, Messaging for In-App and Web User, and Verification. The main content area is titled 'Public Groups' and includes a description: '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.' Below the description, there are links for 'View: All', 'Edit', and 'Create New View'. A table lists the existing public groups:

Action	Label	Group Name	Created By	Created Date
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">sales_team</a>	<a href="#">sales_team</a>	<a href="#">Dutta_Sounak</a>	07/10/2024, 8:33 pm

Activity: creating a Public group as Sales Team



# Task 12: Sharing Settings

Setup

Home

Object Manager

Q Search Setup

Star

Share

Help

Settings

12

Avatar

Q Sharing Setting

Security

Sharing Settings

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

SETUP

Sharing Settings

Work Type Sharing Rules

New Recalculate

Work Type Sharing Rules Help

No sharing rules specified.

Work Type Group Sharing Rules

New Recalculate

Work Type Group Sharing Rules Help

No sharing rules specified.

Appointment Sharing Rules

New Recalculate

Appointment Sharing Rules Help

No sharing rules specified.

Billing details and feedback Sharing Rules

New Recalculate

Billing details and feedback Sharing Rules Help

No sharing rules specified.

Customer Details Sharing Rules

New Recalculate

Customer Details Sharing Rules Help

No sharing rules specified.

Service records Sharing Rules

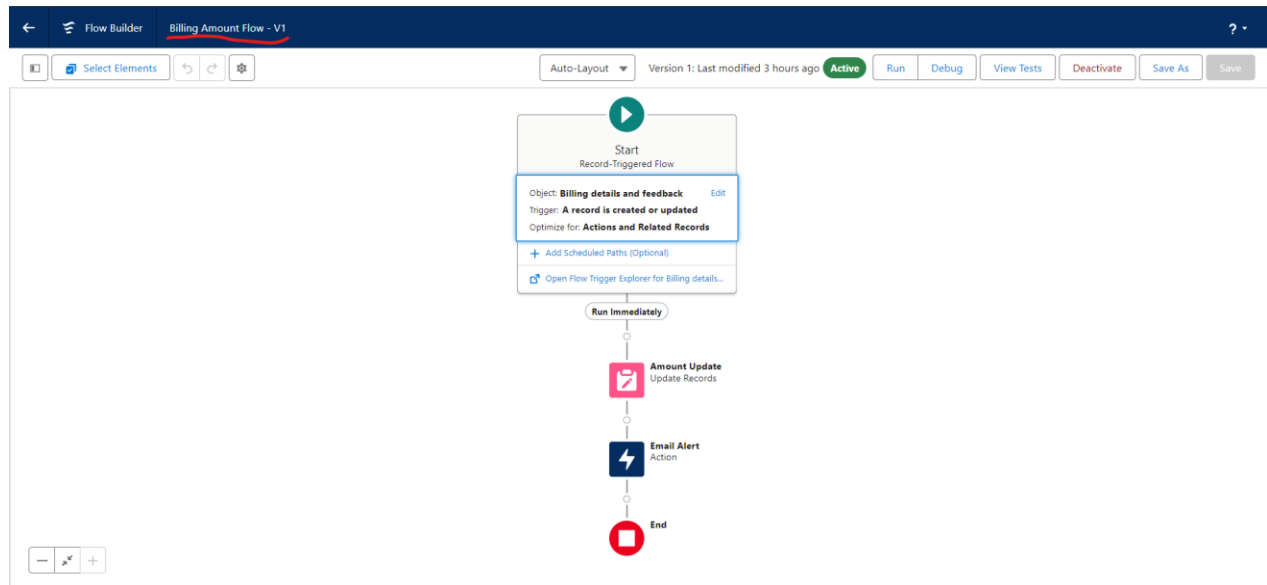
New Recalculate

Service records Sharing Rules Help

Action	Criteria	Shared With	Access Level
<a href="#">Edit</a>   <a href="#">Del</a>	Owner in Role_sales_person	Role_Manager	Read/Write

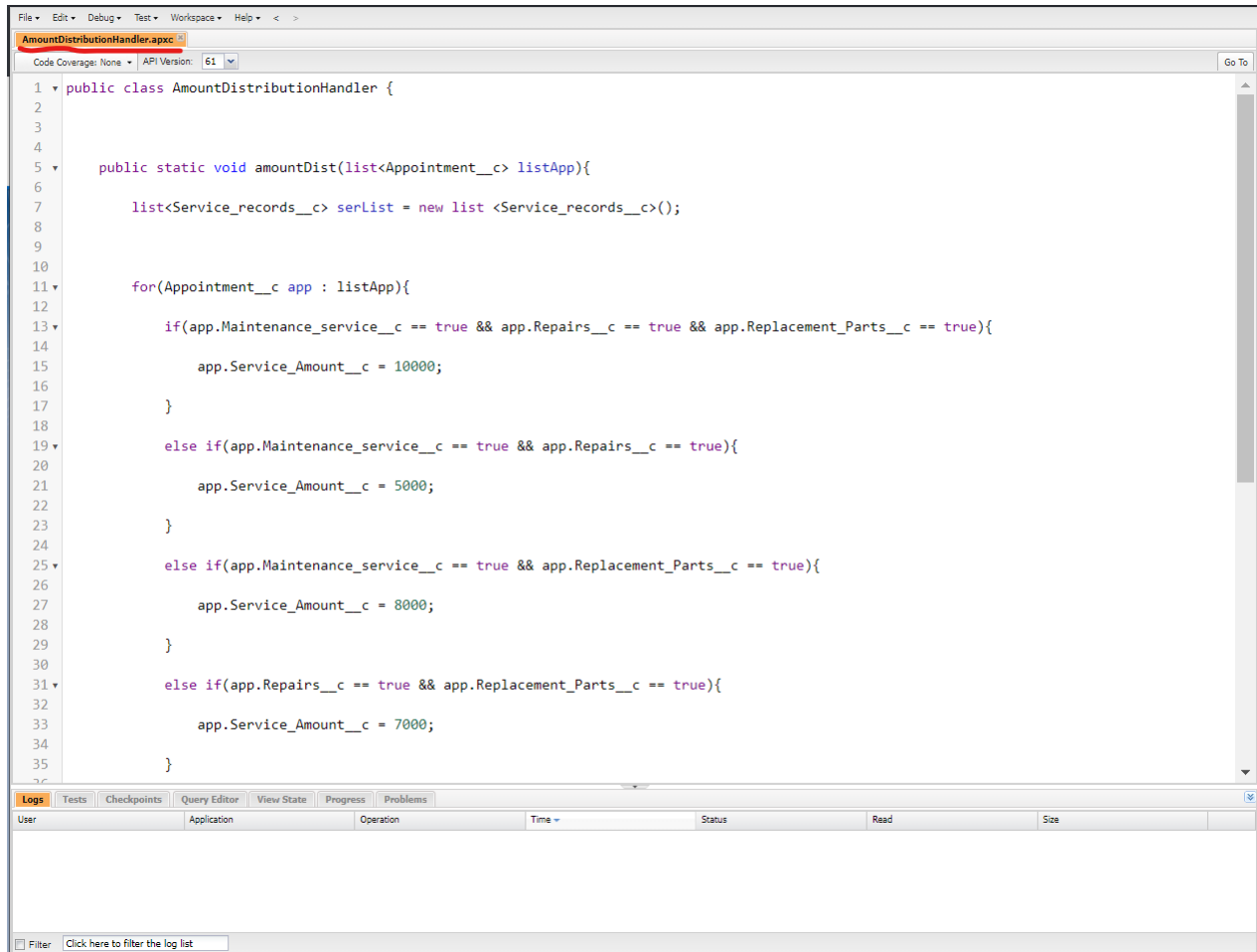
Activity: Creating a Sharing Setting and Making Service Record as private

# Task 13: Flows



Activity: Creating a Flow named as Billing Amount Flow

# Task 14: Apex Trigger

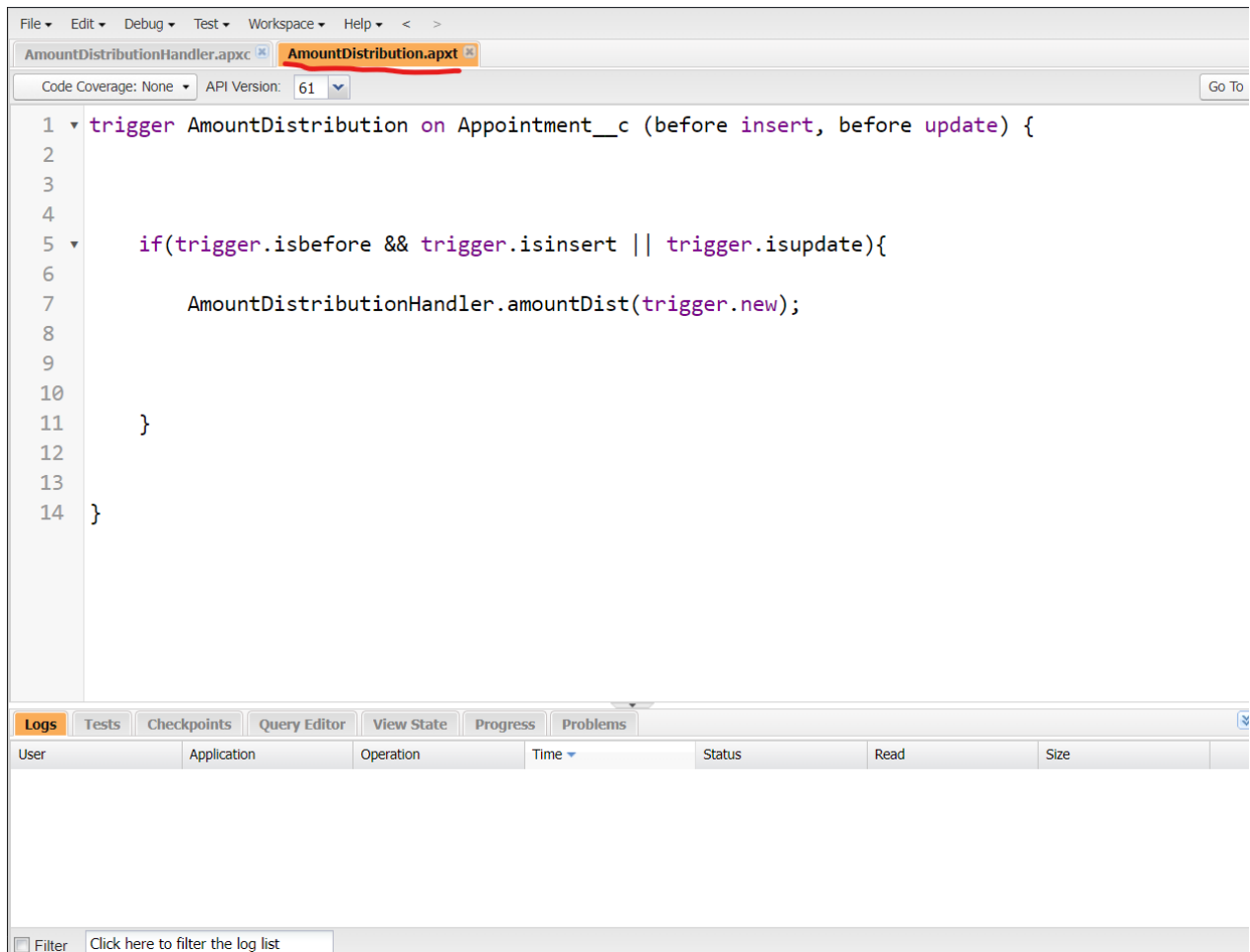


```
1 public class AmountDistributionHandler {
2
3
4
5     public static void amountDist(list<Appointment__c> listApp){
6
7         list<Service_records__c> serList = new list<Service_records__c>();
8
9
10
11        for(Appointment__c app : listApp){
12
13            if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){
14
15                app.Service_Amount__c = 10000;
16
17            }
18
19            else if(app.Maintenance_service__c == true && app.Repairs__c == true){
20
21                app.Service_Amount__c = 5000;
22
23            }
24
25            else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
26
27                app.Service_Amount__c = 8000;
28
29            }
30
31            else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
32
33                app.Service_Amount__c = 7000;
34
35            }
36        }
37    }
```

User	Application	Operation	Time	Status	Read	Size
------	-------------	-----------	------	--------	------	------

Filter Click here to filter the log list

Activity: Creating a Apex Class named as AmountdistributionHandler



Activity: Creating a Apex Trigger named as Amountdistribution

# Task 15: Reports

The screenshot displays a web application interface for 'Garage Management'. The top navigation bar includes a search bar and several menu items: 'Garage Management...', 'Customer Details', 'Appointments', 'Service records', 'Billing details and feedback', 'Reports', and 'Dashboards'. The 'Reports' menu is currently selected.

The main content area is titled 'Report: Service information' and 'New Service Information Report'. It features a summary table with the following data:

Total Records	Total Payment Paid
0	₹0

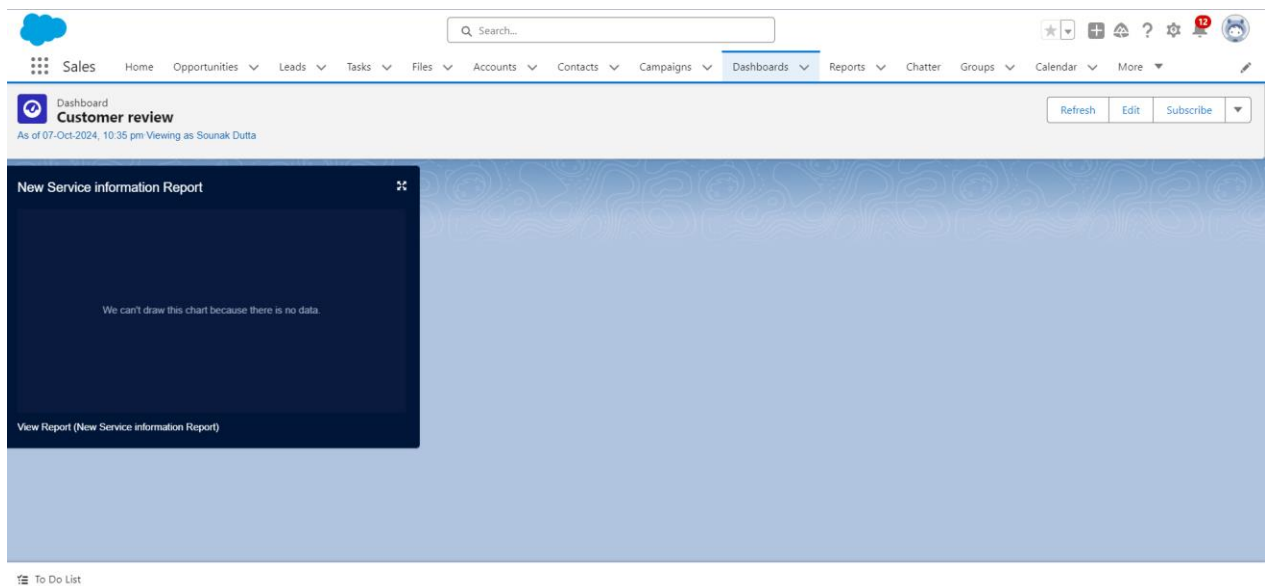
Below the table, there is a large illustration of a desert landscape with cacti and a sun. The text 'No Results' is centered below the illustration. Below this, a message states: 'No records returned. Try editing report filters.' followed by three bullet points:

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

At the bottom of the interface, there is a row of toggle switches for 'Row Counts', 'Detail Rows', 'Subtotals', and 'Grand Total', all of which are currently turned on.

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

## Task 16: Dashboards



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

**Thank You**