

## **Garage Management system**

The Garage Management System is a valuable tool for automotive repair facilities, helping them deliver top-notch service, increase operational efficiency, and build lasting customer relationships. With its user-friendly interface and powerful features, GMS empowers garages to thrive in a competitive market while ensuring a seamless and satisfying experience for both customers and staff. The **Garage Management System (GMS)** is a comprehensive software solution designed to streamline and optimize the operations of automotive repair facilities, service centers, and garages. It provides an array of features tailored to meet the needs of mechanics, service advisors, and business owners, ensuring smoother workflows and higher customer satisfaction.

- **Appointment Scheduling:**
  - Simplifies the booking process for customers.
  - Enables staff to manage daily schedules efficiently, reducing downtime and improving resource allocation.
- **Vehicle Management:**
  - Maintains detailed records of vehicles, including service history, repairs, and maintenance schedules.
  - Tracks vehicle status during servicing for better communication with customers.
- **Customer Relationship Management (CRM):**
  - Stores customer details and preferences.
  - Sends service reminders, follow-ups, and promotional offers to build loyalty.
- **Inventory and Spare Parts Management:**
  - Tracks spare parts stock levels, automates reorder processes, and prevents stockouts.
  - Ensures that mechanics always have the necessary tools and parts on hand.
- **Billing and Invoicing:**
  - Generates professional invoices quickly and accurately.
  - Supports multiple payment methods, discounts, and tax calculations.

- **Work Order Management:**
- Creates detailed work orders with a list of tasks, estimated costs, and timelines.
- Helps staff prioritize jobs and ensures timely completion.
- **Reporting and Analytics:**
- Provides insights into key performance indicators like revenue, job completion rates, and customer feedback.
- Helps identify trends and areas for improvement.

## Salesforce

### Introduction:

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?".

### What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<https://youtu.be/r9EX3IGde5k>

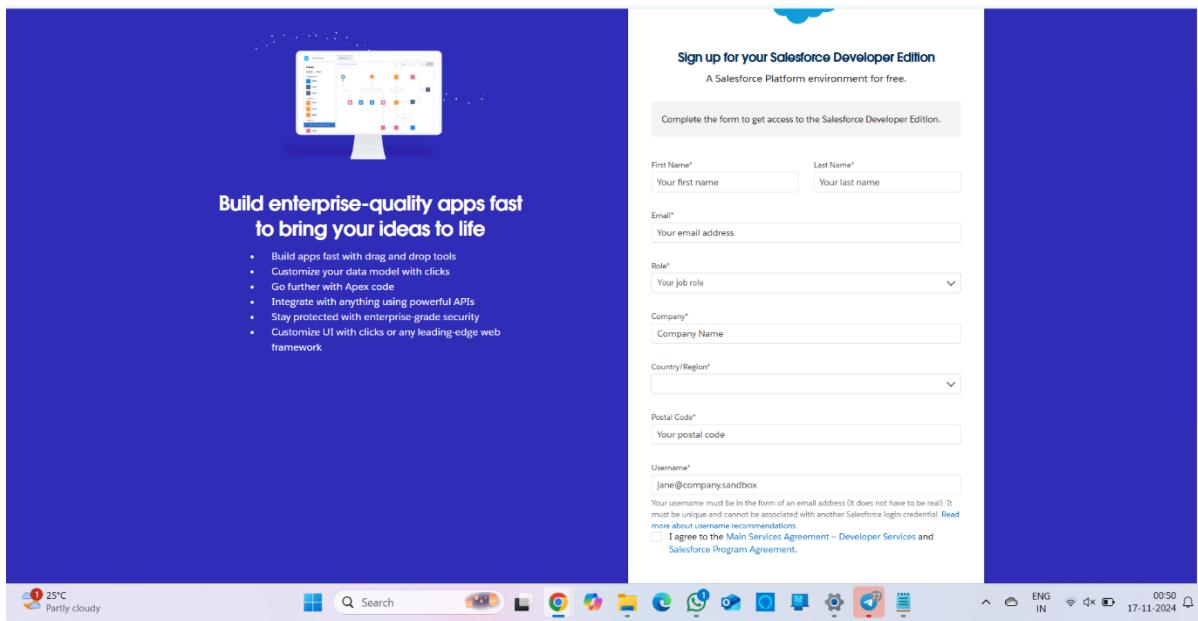
### Creating Developer Account:

## Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :
  1. First name & Last name
  2. Email
  3. Role : Developer
  4. Company : College Name
  5. County : India
  6. Postal Code : pin code
  7. Username : should be a combination of your name and company

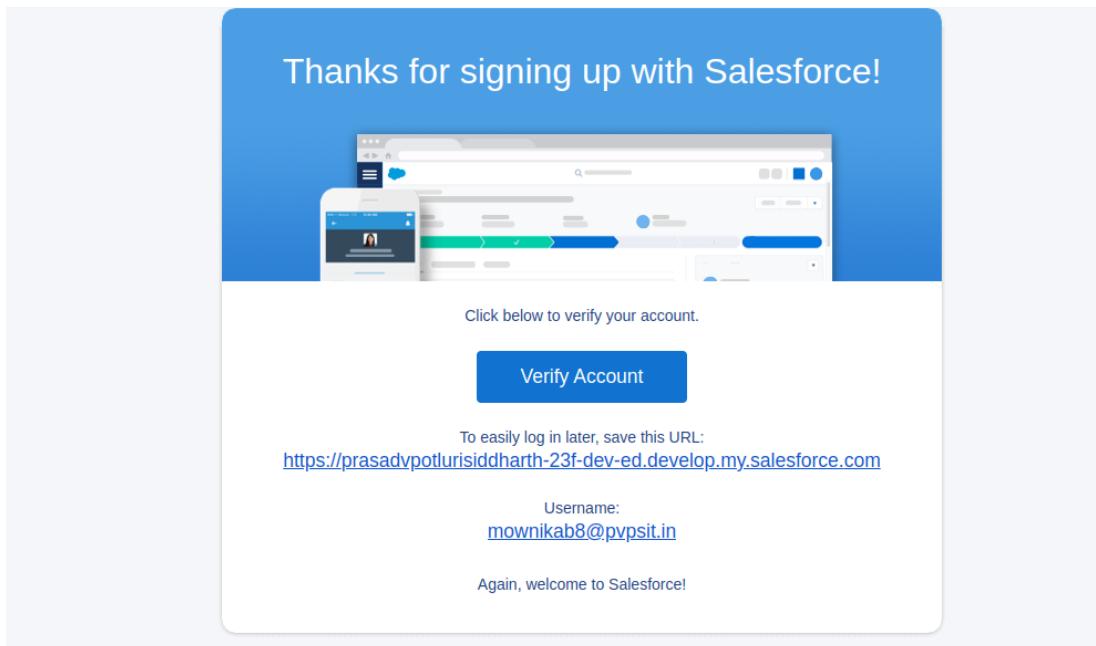
This need not be an actual email id, you can give anything in the format : username@organization.com

Click on sign me up after filling these.



## Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account.



## OBJECT

### What Is an Object?

Salesforce objects are database tables that permit you to store data that is specific to an organization.

What are the types of Salesforce objects

Salesforce objects are of two types:

1. **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. **Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

### Create Customer DetailsObject

To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
  1. Enter the label name >> Customer Details
  2. Plural label name >> Customer Details
  3. Enter Record Name Label and Format
    - Record Name >> Customer Name
    - Data Type >> Text
2. Click on Allow reports and Track Field History,
3. Allow search >> Save.

### **Create Appointment Object**

#### **To create an object:**

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
  1. Enter the label name >> Appointment
  2. Plural label name >> Appointments
  3. Enter Record Name Label and Format
    - Record Name >> Appointment Name
    - Data Type >> Auto Number
    - Display Format >> app-{000}
    - Starting number >> 1
2. Click on Allow reports and Track Field History,
3. Allow search >> Save.

**New Custom Object**

Custom Object Definition Edit

**Custom Object Information**

The singular and plural labels are used in tabs, page layouts, and reports.

Label:  Example: Account  
 Plural Label:  Example: Accounts  
 Starts with vowel sound:

The Object Name is used when referencing the object via the API.

Object Name:  Example: Account  
 Description:

Contact/SendOne Help Setting:  Open the standard Salesforce.com Help & Training window  
 Open a window using a Visualforce page  
 Content Name:

**Enter Record Name Label and Format:**

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name:  Example: Account Name  
 Data Type:  Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.  
 Display Format:  Example: A-00000  
 Starting Number:

**Optional Features**

Allow Reports  
 Allow Activities  
 Track Field History  
 Allow Chatter Groups  
 Enable Licensing

**Object Classification**

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more.

Allow Bulk API Access  
 Allow Bulk API Access  
 Allow Streaming API Access

**Deployment Status**

In Development  
 Deployed

**Search Status**

When this setting is enabled, your users can find records of this object type when they search. Learn more.

Allow Search

**Object Creation Options (Available only when custom object is first created)**

Add Notes and Attachments related list to default page layout  
 Launch New Custom Tab Wizard after saving this custom object

Save | Save & New | Cancel

## Create Service records Object

### To create an object:

- From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
- Enter the label name >> Service records
- Plural label name >> Service records
- Enter Record Name Label and Format
  - Record Name >>Service records Name
  - Data Type >> Auto Number
  - Display Format >> ser-{000}
  - Starting number >> 1
- Click on Allow reports and Track Field History,

### 3. Allow search >> Save.

The screenshot shows the 'New Custom Object' page in the Salesforce setup interface. The object name is 'Service records'. The 'Record Name' field is set to 'Service recordsName' and 'Example' is 'Account Name'. The 'Data Type' is 'Auto Number' and 'Display Format' is 'ser-{000}' with 'Example' 'A-{0000} What Is This?'. Under 'Optional Features', 'Allow Reports' and 'Track Field History' are checked. Under 'Object Classification', 'Allow Sharing' and 'Allow Bulk API Access' are checked. Under 'Deployment status', 'Deployed' is selected. Under 'Search Status', 'Allow Search' is checked. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons.

## Create Billing details and feedback Object

### To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
1. Enter the label name >> Billing details and feedback
2. Plural label name >> Billing details and feedback
3. Enter Record Name Label and Format
  - Record Name >> Billing details and feedback Name
  - Data Type >> Auto Number
  - Display Format >> bill-{000}
  - Starting number >> 1

2. Click on Allow reports and Track Field History,

3. Allow search >> Save.

New Custom Object

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Label: Billing details and feedback Example: Account  
Plural Label: Billing details and feedback Example: Accounts  
Starts with vowel sound:

The Object Name is used when referencing the object via the API.

Object Name: Billing\_details\_and\_feedback Example: Account  
Description:

Context-Sensitive Help Settings:  Open the standard Salesforce.com Help & Training window  Open a window using a Visualforce page  
Content Name:

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name: Billing details and feedback Example: Account Name  
Data Type: Auto Number Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.  
Display Format: bill-(000) Example: A-00000 What Is This?  
Sterling Number:

Optional Features

Allow Reports  
 Allow Activities  
 Track Field History  
 Allow in Chatter Groups  
 Enable Licensing

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. Learn more.

Allow Sharing  
 Allow Bulk API Access  
 Allow Streaming API Access

Deployment Status

In Development  
 Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. Learn more.

Allow Search

Object Creation Options (Available only when custom object is first created)

Add Notes and Attachments related list to default page layout  
 Launch New Custom Tab Wizard after saving this custom object

Save Save & New Cancel

## Tabs

**What is Tab :** A tab is like a user interface that is used to build records for objects and to view the records in the objects.

### Types of Tabs:

#### 1. Custom Tabs

Custom object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

#### 2. Web Tabs

Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window. Web tabs make it easier for your users to quickly access content and applications they

frequently use without leaving the salesforce.com application.

### **3. Visualforce Tabs**

Visualforce Tabs are custom tabs that display a Visualforce page. Visualforce tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.

### **4. Lightning Component Tabs**

Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.

### **5. Lightning Page Tabs**

Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu.

Lightning Page tabs don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs. Lightning Page tabs also don't show up in the Available Tabs list when you customise the tabs for your apps.

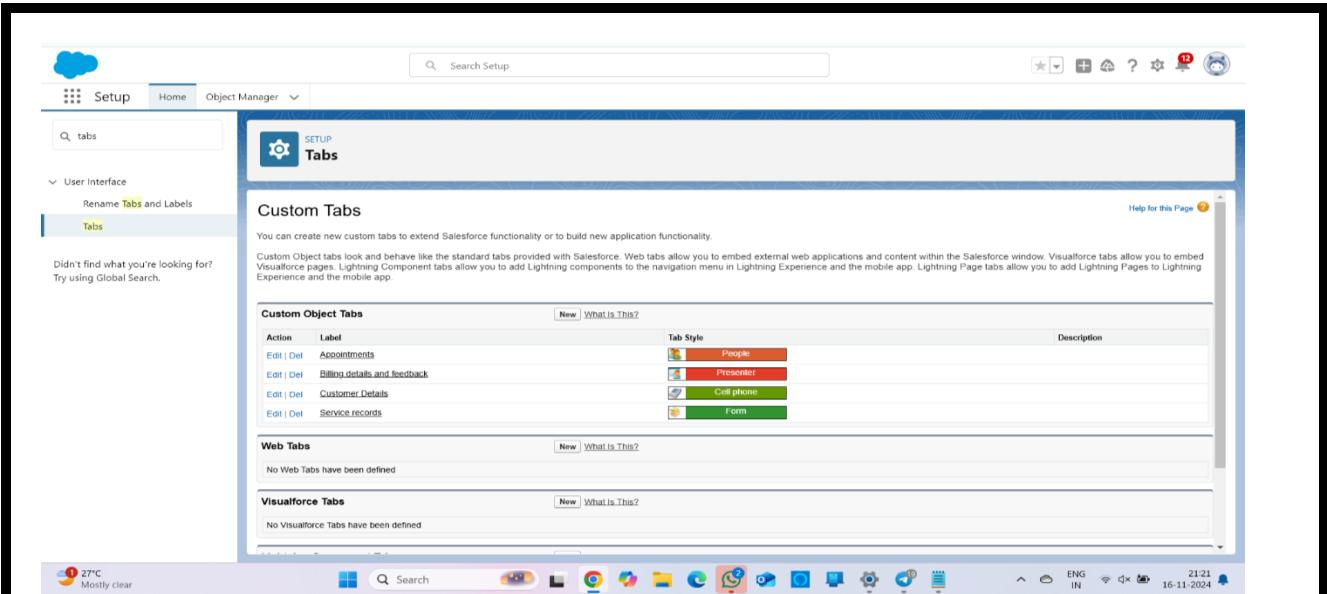
## **Creating a Custom Tab**

### **To create a Tab:(Customer Details)**

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. Select Object(Customer Details) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .
3. Make sure that the Append tab to users' existing personal customizations is checked.
4. Click save.

## **Creating Remaining Tabs**

1. Now create the Tabs for the remaining Objects, they are " Appointments, Service records,Billing details and feedback".
2. Follow the same steps as mentioned in Activity -1 .



## The Lightning App

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

Lightning apps let you brand your apps with a custom colour and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

## Create a Lightning App

### To create a lightning app page:

1. Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App.
2. Fill the app name in app details as Garage Management Application >> Next >> (App option page) keep it as default >> Next >> (Utility Items) keep it as default >> Next.
3. To Add Navigation Items:
4. Select the items (Customer Details, Appointments, Service records, Billing details and feedback, Reports and Dashboards) from the search bar and move it using the arrow button >> Next.
5. To Add User Profiles: Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.

The screenshot shows the Salesforce Setup interface with the "Lightning Experience App Manager" selected. The sidebar on the left has a tree view with "Salesforce Mobile Apps" expanded, showing "Data", "Apps" (selected), "External Client Apps", and "Lightning Bolt". Under "Apps", "App Manager" is selected. The main content area displays a table titled "Lightning Experience App Manager" with 14 rows. The columns are "App Name", "Developer Name", "Description", "Last Modified", "Ap...", and "Vi...". Row 11, which contains the "Garage Management Application" information, is highlighted with a red border.

App Name ↑	Developer Name	Description	Last Modified ...	Ap...	Vi...
1 All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	16/11/2024, 7:28 pm	Classic	
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	16/11/2024, 7:28 pm	Classic	
3 App Launcher	AppLauncher	App Launcher tabs	16/11/2024, 7:28 pm	Classic	
4 Automation	FlowsApp	Automate business processes and repetitive tasks.	16/11/2024, 7:33 pm	Lightning	
5 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	16/11/2024, 7:32 pm	Lightning	
6 Business Rules Engine	ExpressionSetConsole	Create and maintain business rules that perform complex lookups and cal...	16/11/2024, 7:28 pm	Lightning	
7 Community	Community	Salesforce CRM Communities	16/11/2024, 7:28 pm	Classic	
8 Content	Content	Salesforce CRM Content	16/11/2024, 7:28 pm	Classic	
9 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	16/11/2024, 7:28 pm	Lightning	
10 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	16/11/2024, 7:28 pm	Lightning	
11 Garage Management Application	Garage_Management_Application		16/11/2024, 9:27 pm	Lightning	
12 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	16/11/2024, 7:28 pm	Lightning	
13 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	16/11/2024, 7:28 pm	Classic	
14 Platform	Platform	The fundamental Lightning Platform	16/11/2024, 7:28 pm	Classic	

## Fields

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

### Types of Fields

1. Standard Fields
2. Custom Fields

### Creation of fields for the Customer Details object

#### 1. To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Customer Details) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data Type as a “Phone”
4. Click on next.
5. Fill the Above as following:
  - Field Label: Phone number
  - Field Name : gets auto generated

- Click on Next >> Next >> Save and new.

Note: Follow the above steps for the remaining field for the same object.

## 2. To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Customer Details) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Email” and Click on Next
4. Fill the Above as following:
5. Field Label : Gmail
6. Field Name : gets auto generated
7. Click on Next >> Next >> Save and new.

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		✓

## Creation of Lookup Fields

### Creation of Lookup Field on Appointment Object :

1. Go to setup >> click on Object Manager >> type object name( Appointment ) in the search bar

>> click on the object.

2. Now click on “Fields & Relationships” >> New
3. Select “Look-up relationship” as data type and click Next.
4. Select the related object “ Customer Details” and click next.
5. Next >> Next >> Save.

Note: Make sure you complete Activity 4 Before continuing.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and various system icons. The main title is 'SETUP > OBJECT MANAGER' followed by 'Appointment'. On the left, a sidebar lists various setup categories like Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, etc. The main content area is titled 'Fields & Relationships' with a sub-header '9 Items, Sorted by Field Label'. It displays a table with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table rows are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
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)		✓
Phone number	Phone_number__c	Phone		
Repairs	Repairs__c	Checkbox		
Replacement Parts	Replacement_Parts__c	Checkbox		

The bottom of the screen shows the standard Salesforce navigation bar with icons for Home, Search, and various applications, along with system status indicators like weather (26°C Mostly clear), language (ENG IN), date (16-11-2024), and time (21:46).

### Creation of Lookup Field on Service records Object :

1. Go to setup >> click on Object Manager >> type object name( Service records ) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select “Look-up relationship” as data type and click Next.
4. Select the related object “ Appointment ” and click next.
5. Make it a required field so click on Required.
6. Scroll down for Lookup Filter and click on Show filter settings.
7. Now add the filter criteria.
8. Field : Appointment: Appointment Date >> Operator : less than >> select field >>

Appointment: Created Date

9. Filter type should be Required.
10. Error Message : Value does not match the criteria.
11. Enable the filter by click on Active.
12. Next >> Next >> Save.

#### **Creation of Lookup Field on Billing details and feedback Object :**

1. Go to setup >> click on Object Manager >> type object name( Billing details and feedback ) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select “Look-up relationship” as data type and click Next.
4. Select the related object “ Service records” and click next.
5. Next >> Next >> Save & new.

#### **Creation of Checkbox Fields**

##### **Creation of Checkbox Field on Appointment Object :**

1. Go to setup >> click on Object Manager >> type object name( Appointment ) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select “Check box” as data type and click Next.
4. Give the Field Label : Maintenance service
5. Field Name : is auto populated
6. Default value : unchecked
7. Click on next >> next >> save.

##### **Creation of Another Checkbox Field on Appointment Object :**

1. Repeat the steps form 1 to 3.

2. Give the Field Label : Repairs
3. Field Nme : is auto populated
4. Default value : unchecked
5. Click on next >> next >> save.
6. Follow the same and create another checkbox with given names
7. Give the Field Label : Replacement Parts
8. Field Nme : is auto populated
9. Default value : unchecked
10. Click on next >> next >> save.

**Object Manager - Appointment**

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment Name	Name	Auto Number		✓
Created By	CreatedBy	Lookup(User)		
Customer Details	Customer_Details__c	Lookup(Customer Details)		✓
Last Modified By	LastModifiedBy	Lookup(User)		
Maintenance service	Maintenance_service__c	Checkbox		
Owner	OwnerId	Lookup(User,Group)		✓
Phone number	Phone_number__c	Phone		
Repairs	Repairs__c	Checkbox		
Replacement Parts	Replacement_Parts__c	Checkbox		

#### Creation of Checkbox Field on Service records Object :

1. Go to setup >> click on Object Manager >> type object name( Service records ) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select “Check box” as data type and click Next.
4. Give the Field Label : Quality Check Status
5. Field Nme : is auto populated

6. Default value : unchecked

7. Click on next >> next >> save

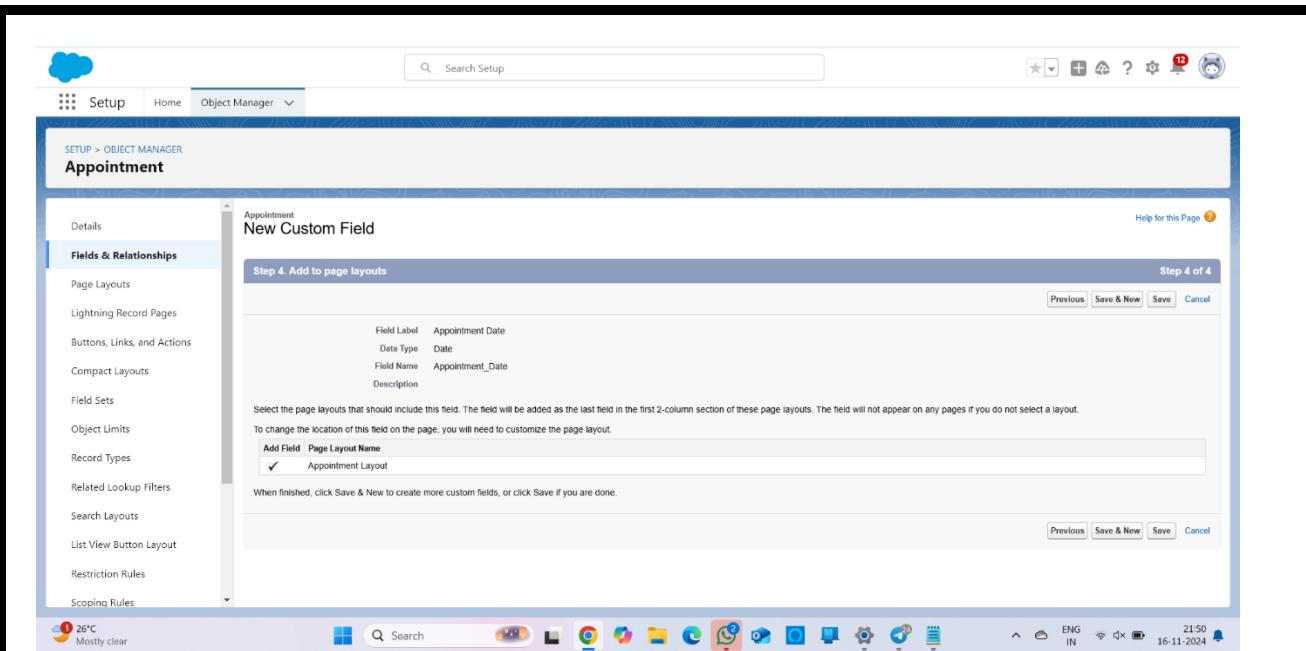
The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and various global icons. The main area displays the 'Service records' object details. On the left, a sidebar lists various setup categories like 'Page Layouts', 'Lightning Record Pages', etc. The central panel is titled 'Fields & Relationships' and shows a table of fields. The table columns are 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. The table contains the following data:

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)		✓
Phone number	Phone_number__c	Phone		
Quality Check Status	Quality_Check_Status__c	Checkbox		
Service recordsName	Name	Auto Number		✓

## Creation of date Fields

### Creation of Date Field on Appointment Object :

1. Go to setup >> click on Object Manager >> type object name( Appointment ) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select “Date” as data type and click Next.
4. Give the Field Label : Appointment Date
5. Field Nme : is auto populated
6. Make it as a Required field by click on the Required option.
7. Click on next >> next >> save.



## Creation of Currency Fields

### Creation of Currency Field on Appointment Object :

Go to setup >> click on Object Manager >> type object name( Appointment ) in the search bar >> click on the object.

Now click on “Fields & Relationships” >> New.

Select “Currency” as data type and click Next.

Give the Field Label : Service Amount

Field Nme : is auto populated

Click on next

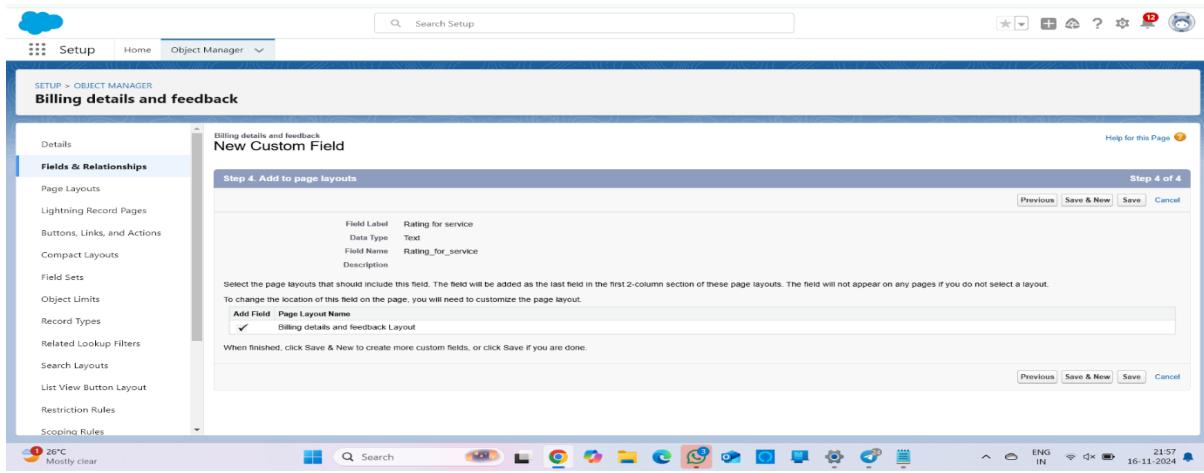
Give read only for all the profiles in field level security for profile.

1. Click on next >> save.
2. Make field as Required and Unique.
3. Click on next >> next >> save.

### Creation of Text Fields in Billing details and feedback object :

1. Go to setup >> click on Object Manager >> type object name( Billing details and feedback ) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select “text” as data type and click Next.
4. Give the Field Label : Rating for service

5. Field Name : is auto populated
6. Length : 1
7. Make field as Required and Unique.
8. Click on next >> next >> save



## Creation of Picklist Fields

### Creation of Picklist Fields in Service records object :

1. Go to setup >> click on Object Manager >> type object name(Service records) in search bar >> click on the object.
2. Click on fields & relationship >> click on New.
3. Select Data type as "Picklist" and click Next.
4. Enter Field Label as "Service Status", under values select "Enter values, with each value separated by a new line" and enter values as shown below.
5. The values are: Started, Completed.
6. Click Next.
7. Next >> Next >> Save.

### Creation of Picklist Fields in Billing details and feedback object :

1. Go to setup >> click on Object Manager >> type object name(Billing details and feedback) in search bar >> click on the object.

2. Click on fields & relationship >> click on New.
3. Select Data type as “Picklist” and click Next.
4. Enter Field Label as “Payment Status”, under values select “Enter values, with each value separated by a new line” and enter values as shown below.
5. The values are: Pending, Completed.
6. Click Next.
7. Next >> Next >> Save.

### **Creating Formula Field in Service records Object**

1. Go to setup >> click on Object Manager >> type object name(Service records) in search bar >> click on the object.
2. Click on fields & relationship >> click on New.
3. Select Data type as “Formula” and click Next.
4. Give Field Label and Field Name as “service date” and select formula return type as “Date” and click next.
5. Insert field formula should be : CreatedDate
6. click “Check Syntax” .
7. Click next >> next >> Save.

The screenshot shows the Salesforce Object Manager interface. The left sidebar has a 'Fields & Relationships' section selected. The main area displays a table titled 'Fields & Relationships' with the following data:

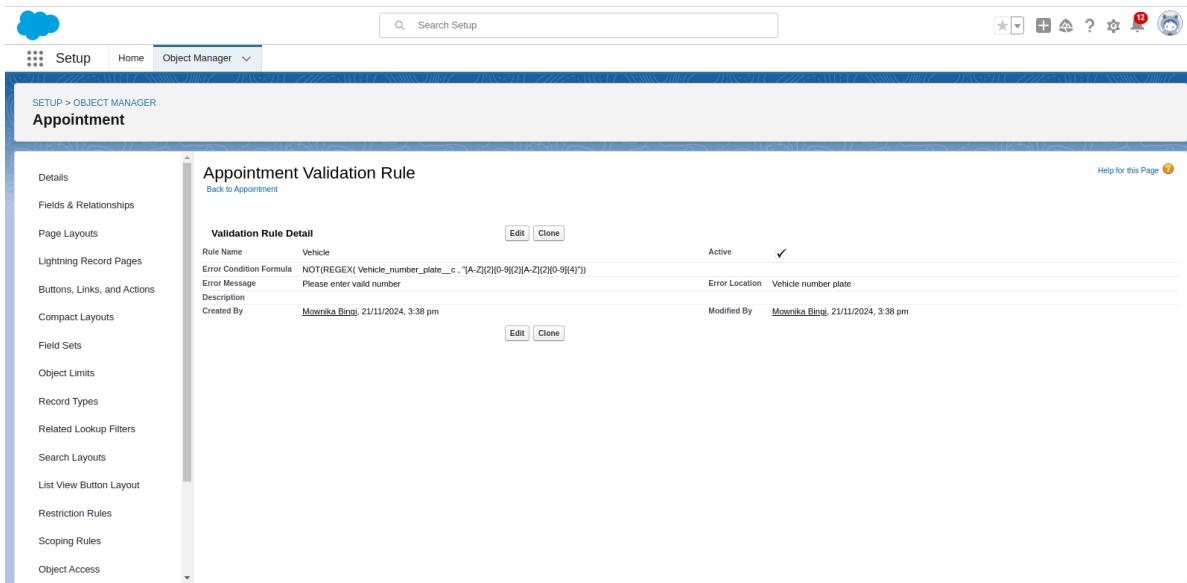
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment	Appointment_c	Lookup(Appointment)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone number	Phone_number_c	Phone		
Quality Check Status	Quality_Check_Status_c	Checkbox		
service date	service_date_c	Formula (Date)		
Service recordsName	Name	Auto Number		✓

## Validation rule

Validation rules are applied when a user tries to save a record and are used to check if the data meets specified criteria. If the criteria are not met, the validation rule triggers an error message and prevents the user from saving the record until the issues are resolved.

### To create a validation rule to an Appointment Object

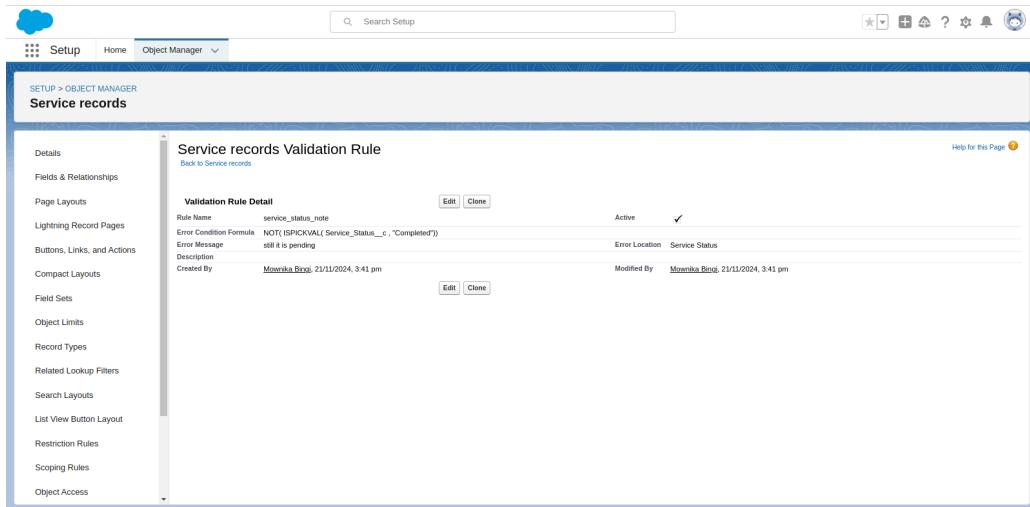
1. Go to the setup page >> click on object manager >> From drop down click edit for Appointment object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as " Vehicle ".
4. Insert the Error Condition Formula as : -  
1. NOT(REGEX( Vehicle\_number\_plate\_\_c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))
5. Enter the Error Message as "Please enter valid number ", select the Error location as Field and select the field as "Vehicle number plate", and click Save.



### To create a validation rule to an Service records Object

1. Go to the setup page >> click on object manager >> From drop down click edit for Service records object.
2. Click on the validation rule >> click New.

3. Enter the Rule name as “ service\_status\_note ”.
4. Insert the Error Condition Formula as : -
1. NOT( ISPICKVAL( Service\_Status\_\_c , "Completed") )
  
  
  
6. Enter the Error Message as “still it is pending”, select the Error location as Field and select the field as “Service status”, and click Save.



### To create a validation rule to an Billing details and feedback Object

1. Go to the setup page >> click on object manager >> From drop down click edit for Billing details and feedback object.
  2. Click on the validation rule >> click New.
  3. Enter the Rule name as “ rating\_should\_be\_less\_than\_5 ”.
  4. Insert the Error Condition Formula as : -
- NOT( REGEX( Rating\_for\_service\_\_c , "[1-5]{1}" ) )

Enter the Error Message as “rating should be from 1 to 5”, select the Error location as Field and select the field as “Rating for Service”, and click Save.

### Duplicate rule

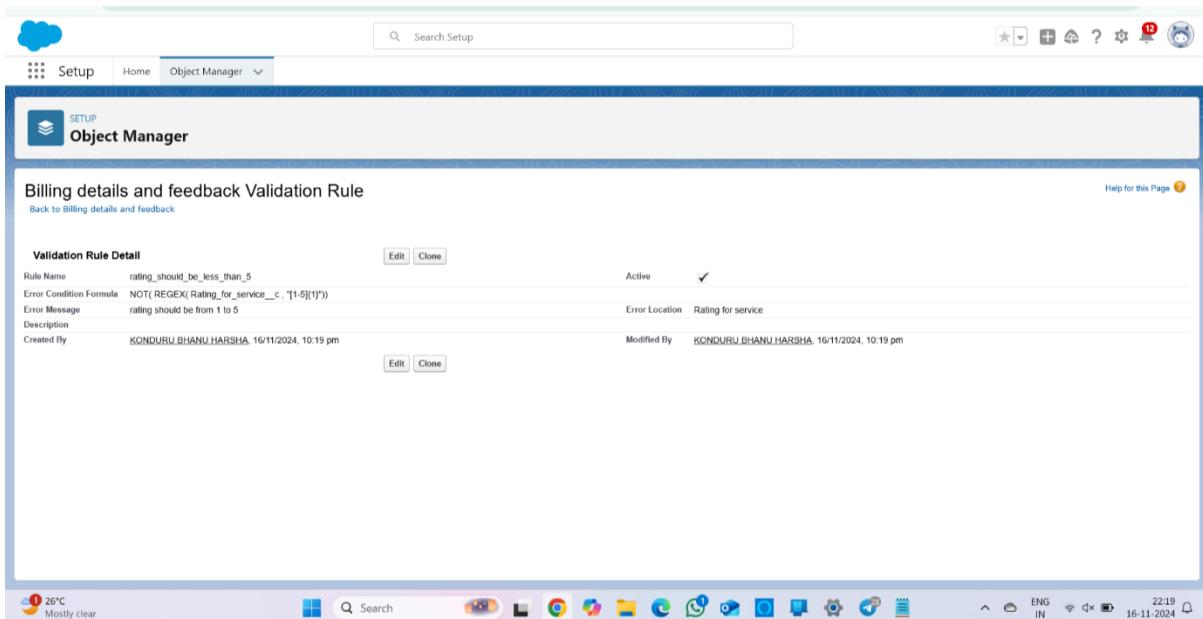
### To create a matching rule to an Customer details Object

1. Go to quick find box in setup and search for matching Rule.
2. Click on matching rule >> click on New Rule.
3. Select the object as Customer details and click Next.
4. Give the Rule name : Matching customer details
5. Unique name : is auto populated
6. Define the matching criteria as

7. Field Matching Method

1. Gmail Exact

2. Phone Number



Exact

8. Click save.
9. After Saving Click on Activate.

### To create a Duplicate rule to an Customer details Object

1. Go to quick find box in setup and search for Duplicate rules.
2. Click on Duplicate r permissions.

3. Rule >> click on New Rule >> select customer details object.

3. Give the Rule name as : Customer Detail duplicate

4. Scroll a little in Matching rule section

5. Select the matching rule : Matching customer details

6. And Click on save.

7. After saving the Duplicate Rule, Click on Activate.

The screenshot shows the Salesforce Setup interface. In the top left, there's a blue cloud icon followed by 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'Search Setup'. To the right of the search bar are several small icons: a star, a plus sign, a question mark, a gear, a bell, and a refresh symbol.

In the main content area, a sidebar on the left has a search bar with 'duplic' typed in. Below it, under 'Data', are 'Duplicate Management', 'Duplicate Error Logs', 'Duplicate Rules' (which is selected and highlighted in blue), and 'Matching Rules'. A note below says, 'Didn't find what you're looking for? Try using Global Search.'

The main panel title is 'SETUP Duplicate Rules'. Below it, a sub-section title is 'Customer Details Duplicate Rule Customer Detail duplicate'. There are four buttons at the top of this section: 'Edit', 'Delete', 'Clone', and 'Deactivate'. To the right, it says 'Order 1 of 1 [Reorder]'.  

Rule Name	Description	Action	Operations On Create	Operations On Edit
Customer Detail duplicate	Customer Details Enforce sharing rules Allow	Allow	<input checked="" type="checkbox"/> Alert <input checked="" type="checkbox"/> Report	<input type="checkbox"/> Alert <input type="checkbox"/> Report
	Alert Text: Use one of these records?			
	Active: ✓			
Matching Rule	Matching customer details Mapped			
Conditions			Matching Criteria: (Customer Details: Email exct MatchBlank = FALSE) AND (Customer Details: Phone_number exct MatchBlank = FALSE)	
Created By	Mounika Singh, 21/11/2024, 3:47 pm		Modified By: Mounika Singh, 21/11/2024, 3:47 pm	

At the bottom of the main panel, there are four buttons: 'Edit', 'Delete', 'Clone', and 'Deactivate'.

## Profiles

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

### Manager Profile

#### To create a new profile:

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (Manager) >> Save.
2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the Garage management.
4. Scroll down to Custom Object Permissions and Give access permissions for Appointments,Billing details and feedback , service records and customer details objects as mentioned in the below diagram.

5. Changing the session times out after should be “ 8 hours of inactivity”.
6. Change the password policies as mentioned :
7. User passwords expire in should be “ never expires ”.
8. Minimum password length should be “ 8 ”, and click save.

The screenshot shows the Salesforce Setup interface under the Profiles section. It lists a profile named 'Manager' with the following details:

- Name:** Manager
- User License:** Salesforce
- Description:** (empty)
- Created By:** Moenika Binoj, 21/11/2024, 3:49 pm
- Modified By:** Moenika Binoj, 21/11/2024, 3:56 pm

The 'Page Layouts' section shows assignments for various standard objects:

Standard Object	Layout Type	Assignment
Account	Global	Global Layout [View Assignment]
Opportunity	Global	Global Layout [View Assignment]
Lead	Global	Global Layout [View Assignment]
Invoice	Global	Global Layout [View Assignment]
Invoice Line	Global	Global Layout [View Assignment]
Location	Global	Global Layout [View Assignment]
Location Group	Global	Global Layout [View Assignment]
Location Group Assignment	Global	Global Layout [View Assignment]
Macro	Global	Macro Layout [View Assignment]

## Sales person Profile

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Salesforce Platform User) >> enter profile name (sales person) >> Save.
2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the GArage management.
4. Scroll down to Custom Object Permissions and Give access permissions for Appointments,Billing details and feedback , service records and customer details objects as mentioned in the below diagram.
5. And click save.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page selected. The profile 'sales person' is displayed, showing its details and assigned permissions. The 'Page Layouts' section lists various object layouts for different record types.

**Profile Detail**

Name	sales person	Custom Profile	✓
User License	Salesforce Platform		
Description			
Created By	Mounika Bingi, 21/11/2024, 3:58 pm	Modified By	Mounika Bingi, 21/11/2024, 3:59 pm

**Page Layouts**

Standard Object Layouts	Global	Object Layout	Assignment	Object Layout	Assignment
Email Application	Not Assigned	[View Assignment]	Fulfillment Order Item Tax	Fulfillment Order Item Tax Layout	[View Assignment]
Home Page Layout	Home Page Default	[View Assignment]	Fulfillment Order Product	Fulfillment Order Product Layout	[View Assignment]
Account	Account Layout	[View Assignment]	Idea	Varies by Record Type	[View Assignment]
Alternative Payment Method	Alternative Payment Method Layout	[View Assignment]	Individual	Individual Layout	[View Assignment]
Appointment Invitation	Appointment Invitation Layout	[View Assignment]	Invoice	Invoice Layout	[View Assignment]
Asset	Asset Layout	[View Assignment]	Invoice Line	Invoice Line Layout	[View Assignment]
Asset Relationship	Asset Relationship Layout		Lead	Lead Layout	[View Assignment]
			Location	Location Layout	

### 3. Give Label

"Manager" and Role name gets auto populated. Then click on Save.

as

## Creating another roles

1. Go to quick find >> Search for Roles >> click on set up roles.
2. Click plus on CEO role, and click add role under manager.
3. Give Label as "sales person" and Role name gets auto populated. Then click on Save.

**Role**  
**sales person**

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: PRASAD V POTLURI SIDDHARTHA INSTITUTE OF TECHNOLOGY > CEO > Manager = sales person

**Role Detail**

	Label	Role Name	Role Name as displayed on reports
This role reports to	Manager	sales_person	Role, Role and Internal Subordinates
Modified By	Mounika Bingsi, 21/11/2024, 4:29 pm		
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities		
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases		

**Users in sales person Role**

Action	Full Name	Alias	Username	Active
Edit	Sushmitha Nayagi	snpvba	sushmitha@123.txt	✓
Edit	Jyothi Pusuluri	jusu	jyothi@123.txt	✓
Edit	Bharavi Morda	bmodi	bharavi@123.txt	✓

## Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

## Create User

1. Go to setup >> type users in quick find box >> select users >> click New user.
2. Fill in the fields
  1. First Name : Niklaus
  2. Last Name : Mikaelson
  3. Alias : Give a Alias Name
  4. Email id : Give your Personal Email id
  5. Username : Username should be in this form: text@text.text
  6. Nick Name : Give a Nickname
  7. Role : Manager
  8. User licence : Salesforce
  9. Profiles : Manager

### 3. Save.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. On the left, there's a sidebar with navigation links for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and a prominent 'Users' link which is highlighted in blue. The main content area is titled 'User' and shows a record for 'Niklaus Mikaelson'. The 'User Detail' section contains fields for Name (Niklaus Mikaelson), Alias (nmika), Email (mownikabing@gmail.com), Username (mowni123@abc.text), Nickname (mownika), Title, Company, Department, Division, Address, Time Zone (GMT+05:30) India Standard Time (Asia/Kolkata), Locale (English (India)), Language (English), Delegated Approver, Manager, and several checkboxes for roles like Manager, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode (Classic Only), Debug Mode, High-Contrast Palette on Charts, Load Lightning Pages While Scrolling, Salesforce CRM Content User, and Receive Salesforce CRM Content Email. At the bottom, there are sections for App Registration: One-Time Password Authenticator and App Registration: Salesforce Authenticator, along with a note about Security Key FOB or WebAuthn.

### creating another users

1. Repeat the steps and create another user using
  1. Role : sales person
  2. User licence : Salesforce Platform
  3. Profile : sales person

**Note : create atleast 3 users with these**

### Public groups

Public groups are a valuable tool for Salesforce administrators and developers to streamline user management, data access, and security settings. By creating and using public groups effectively, you can maintain a secure and organized Salesforce environment while ensuring that users have appropriate access to the resources they need.

#### Creating New Public Group

1. Go to setup >> type users in quick find box >> select public groups >> click New.

2. Give the Label as “sales team”.
3. Group name is autopopulated.
4. Search for Roles.
5. In Available Members select Sales person and click on add it will be moved to selected member.
6. Click on save.

Action	Label	Group Name	Created By	Created Date
Edit   Delete	sales_team	sales_team	Biragi, Monika	21/11/2024, 4:37 pm

<https://orasadvooturisiddharth-23f-dev-ed.develop.lightning.force.com/lightning/setup/PublicGroups/home>

## Sharing Setting

Salesforce allows you to configure sharing settings to control how records are accessed and shared within your organization. These settings are crucial for maintaining data security and privacy. Salesforce provides a variety of tools and mechanisms to define and enforce sharing rules, such as:

### Organization-Wide Default (OWD) Settings:

These settings define the default level of access for all objects within your Salesforce org.

OWD settings include Private, Public Read-Only, Public Read/Write, and Controlled by Parent.

OWD settings can be configured for each standard and custom object.

### Role Hierarchy:

Salesforce uses a role hierarchy to determine record access.

Users at higher levels in the hierarchy have greater access to records owned by or shared with users

lower in the hierarchy.

The role hierarchy is often used in combination with OWD settings to grant different levels of access.

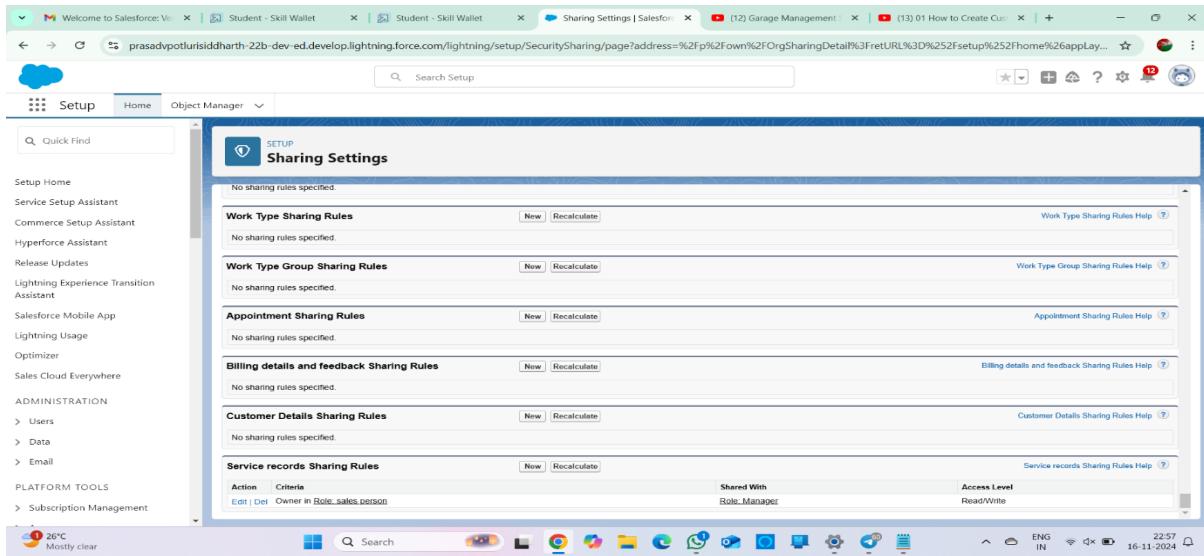
### **Profiles and Permission Sets:**

Profiles and permission sets allow administrators to specify object-level and field-level permissions for users.

Profiles are typically used to grant general object and field access, while permission sets can be used to extend those permissions to specific users.

### **Creating Sharing settings**

1. Go to setup >> type users in quick find box >> select Sharing Settings >> click Edit.
2. Change the OWD setting of the Service records Object to private as shown in fig.
3. Click on save and refresh.
4. Scroll down a bit, Click new on Service records sharing Rules.
5. Give the Label name as “ Sharing setting”
6. Rule name is auto populated.
7. In step 3 : Select which records to be shared, members of “ Roles ” >> “ Sales person”
8. In step 4: share with, select “ Roles ” >> “ Manager ”
9. In step 5 : Change the access level to “ Read / write ”.
10. Click on save.



## Flows

### Create a Flow

1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.
2. Select the Record-triggered flow and Click on Create.
3. Select the Object as “Billing details and feedback” in the Drop down list.
4. Select the Trigger Flow when: “A record is Created or Updated”.
5. Select the Optimize the flow for: “Actions and Related Records” and Click on Done.
6. Under the Record-triggered Flow Click on “+” Symbol and In the Drop down List select the “Update records Element”. Give the Label Name : Amount Update
7. Api name : is auto populated
8. Set a filter condition : All Conditions are met(AND)
9. Field : Payment\_Status\_\_c
10. Operator : Equals
11. Value : Completed
12. And Set Field Values for the Billing details and feedback Record
13. Field : Payment\_Paid\_\_c
14. Value : {!\$Record.Service\_records\_\_r.Appointment\_\_r.Service\_Amount\_\_c}

15. Click On Done.Before creating another Element. Create a New Resource form Toolbox form top left.
16. Click on the New Resource, And select Variable.
17. Select the resource type as text template.
18. Enter the API name as “ alert”.
19. Change the view as Rich Text ? View to Plain Text.
20. In body field paste the syntax that given below.

Dear {!\$Record.Service\_records\_\_r.Appointment\_\_r.Customer\_Name\_\_r.Name},

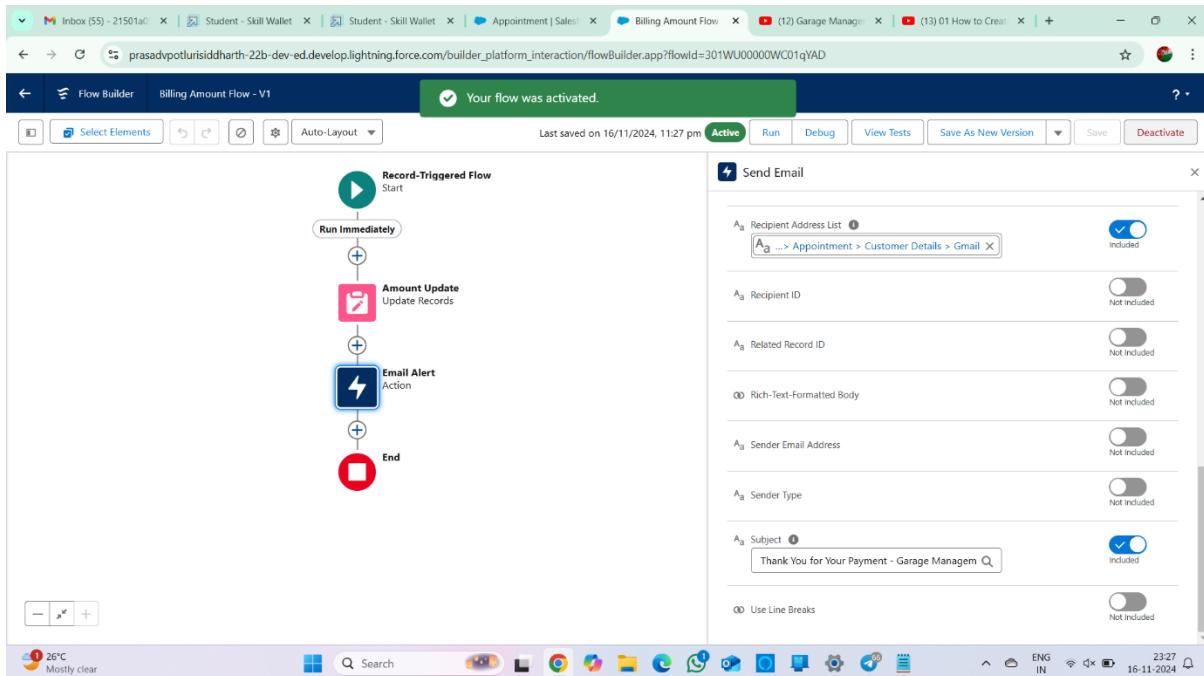
I hope this message finds you well. I wanted to take a moment to express my sincere gratitude for your recent payment for the services provided by our garage management team. Your prompt payment is greatly appreciated, and it helps us continue to provide top-notch services to you and all our valued customers.

Amount paid : {!\$Record.Payment\_Paid\_\_c}

Thank you for Coming .

23. Click done.
24. Now Click on Add Element , select Action.
25. Their action bar will be opened in that search for “ send email ” and click on it.
26. Give the label name as “ Email Alert”
27. API name will be auto populated.
28. Enable the body in set input values for the selected action.
29. Select the text template that created , Body : {!alert}
30. Include recipient address list select the email form the record.
31. RecipientAddressList:  
    {!\$Record.Service\_records\_\_r.Appointment\_\_r.Customer\_Name\_\_r.Gmail\_\_c}
32. Include subject as “ Thank You for Your Payment - Garage Management”.
33. Click done.
34. Click on save. Give the Flow label , Flow Api name will be autopopulated.

35. And click save, and click on activate.



## Apex Trigger

Apex can be invoked by using triggers. Apex triggers enable you to perform custom actions before or after changes to Salesforce records, such as insertions, updates, or deletions.

A trigger is Apex code that executes before or after the following types of operations:

- insert
- update
- delete
- merge
- upsert
- undelete

For example, you can have a trigger run before an object's records are inserted into the database, after records have been deleted, or even after a record is restored from the Recycle Bin.

You can define triggers for top-level standard objects that support triggers, such as a Contact or an

Account, some standard child objects, such as a CaseComment, and custom objects. To define a trigger, from the object management settings for the object whose triggers you want to access, go to Triggers.

There are primarily two types of Apex Triggers:

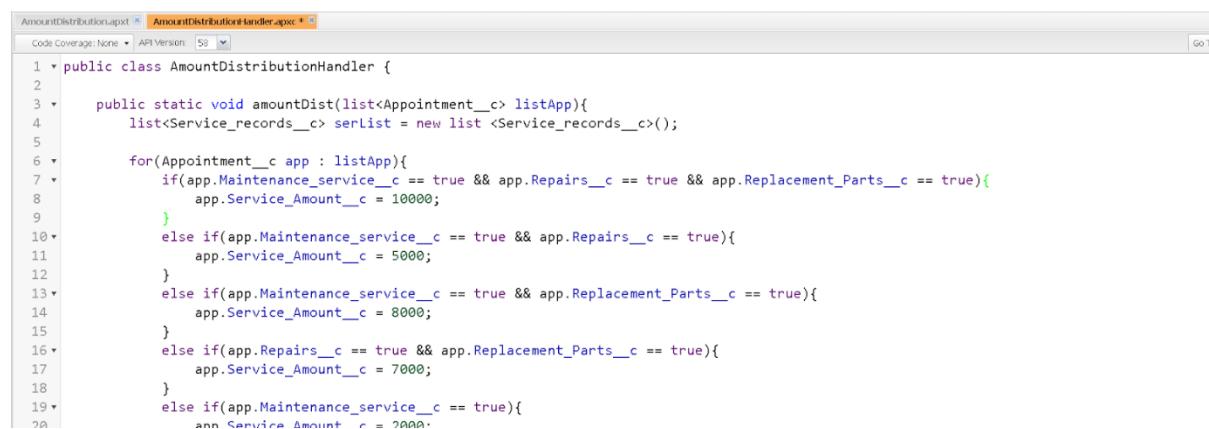
**Before Trigger:** This type of trigger in Salesforce is used either to update or validate the values of a record before they can be saved into the database. So, basically, the before trigger validates the record first and then saves it. Some criteria or code can be set to check data before it gets ready to be inserted into the database.

**After Trigger:** This type of trigger in Salesforce is used to access the field values set by the system and affect any change in the record. In other words, the after trigger makes changes to the value from the data inserted in some other record.

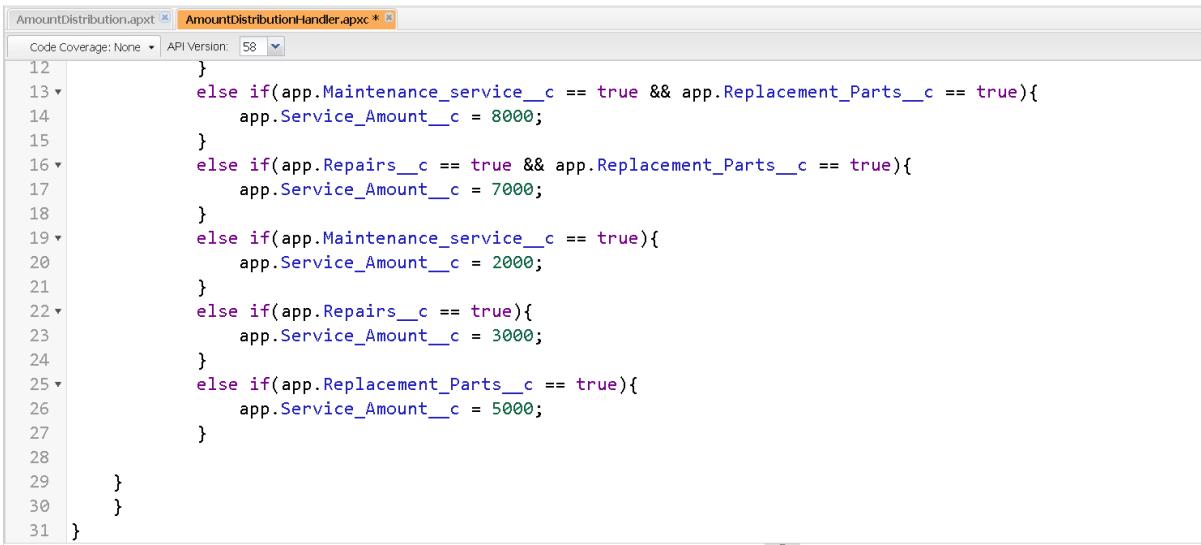
## Apex handler

UseCase : This use case works for Amount Distribution for each Service the customer selected for there Vehicle.

1. Login to the respective trailhead account and navigate to the gear icon in the top right corner.
2. Click on the Developer console. Now you will see a new console window.
3. In the toolbar, you can see FILE. Click on it and navigate to new and create New apex class.
4. Name the class as "AmountDistributionHandler".



```
AmountDistribution.apxc | AmountDistributionHandler.apc # 1
Code Coverage:None API Version: 58 Go To
1 public class AmountDistributionHandler {
2
3     public static void amountDist(list<Appointment__c> listApp){
4         list<Service_records__c> serList = new list <Service_records__c>();
5
6         for(Appointment__c app : listApp){
7             if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){
8                 app.Service_Amount__c = 10000;
9             }
10            else if(app.Maintenance_service__c == true && app.Repairs__c == true){
11                app.Service_Amount__c = 5000;
12            }
13            else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
14                app.Service_Amount__c = 8000;
15            }
16            else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
17                app.Service_Amount__c = 7000;
18            }
19            else if(app.Maintenance_service__c == true){
20                app.Service_Amount__c = 2000;
21            }
22        }
23    }
}
```



```
AmountDistribution.apxtx | AmountDistributionHandler.apxc * ④
Code Coverage: None API Version: 58
12     }
13     else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
14         app.Service_Amount__c = 8000;
15     }
16     else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
17         app.Service_Amount__c = 7000;
18     }
19     else if(app.Maintenance_service__c == true){
20         app.Service_Amount__c = 2000;
21     }
22     else if(app.Repairs__c == true){
23         app.Service_Amount__c = 3000;
24     }
25     else if(app.Replacement_Parts__c == true){
26         app.Service_Amount__c = 5000;
27     }
28
29 }
30 }
31 }
```

**Code:**

```
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;  
}  
  
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.Replacement_Parts__c == true){  
  
    app.Service_Amount__c = 5000;  
}  
  
}  
  
}  
  
}
```

#### **Trigger Handler :**

How to create a new trigger :

1. While still in the trailhead account, navigate to the gear icon in the top right corner.
2. Click on developer console and you will be navigated to a new console window.
3. Click on File menu in the tool bar, and click on new? Trigger.
4. Enter the trigger name and the object to be triggered.
5. Name : AmountDistribution
6. sObject : Appointment\_\_c

#### **Syntax For creating trigger :**

The syntax for creating trigger is :

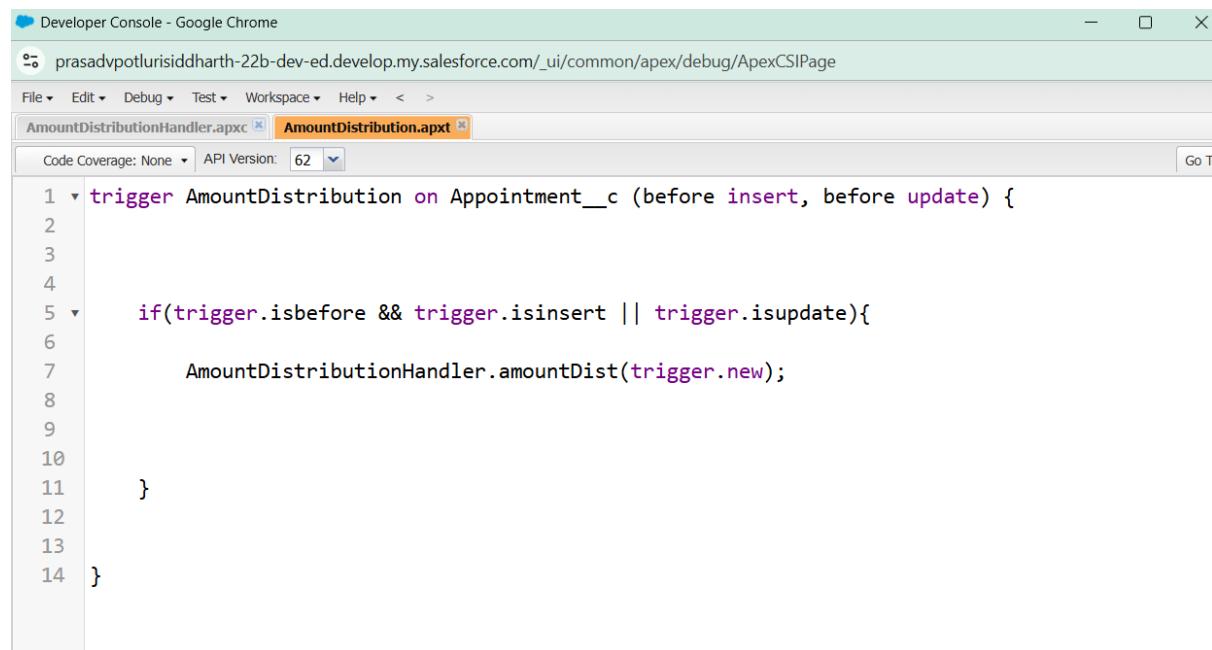
Trigger [trigger name] on [object name]( Before/After event)

```
{  
}  
}
```

In this project , trigger is called whenever the particular records sum exceed the threshold i.e minimum business requirement value. Then the code in the trigger will get executed.

#### Code:

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



The screenshot shows the Salesforce Developer Console in Google Chrome. The URL is `prasadvpotlurisiddharth-22b-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage`. The tabs at the top are `AmountDistributionHandler.apxc` and `AmountDistribution.apxt`, with `AmountDistribution.apxt` being the active tab. The code editor displays the trigger code:

```
1 trigger AmountDistribution on Appointment__c (before insert, before update) {  
2  
3  
4  
5     if(trigger.isbefore && trigger.isinsert || trigger.isupdate){  
6  
7         AmountDistributionHandler.amountDist(trigger.new);  
8  
9  
10    }  
11  
12  
13}  
14 }
```

#### Reports

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others.

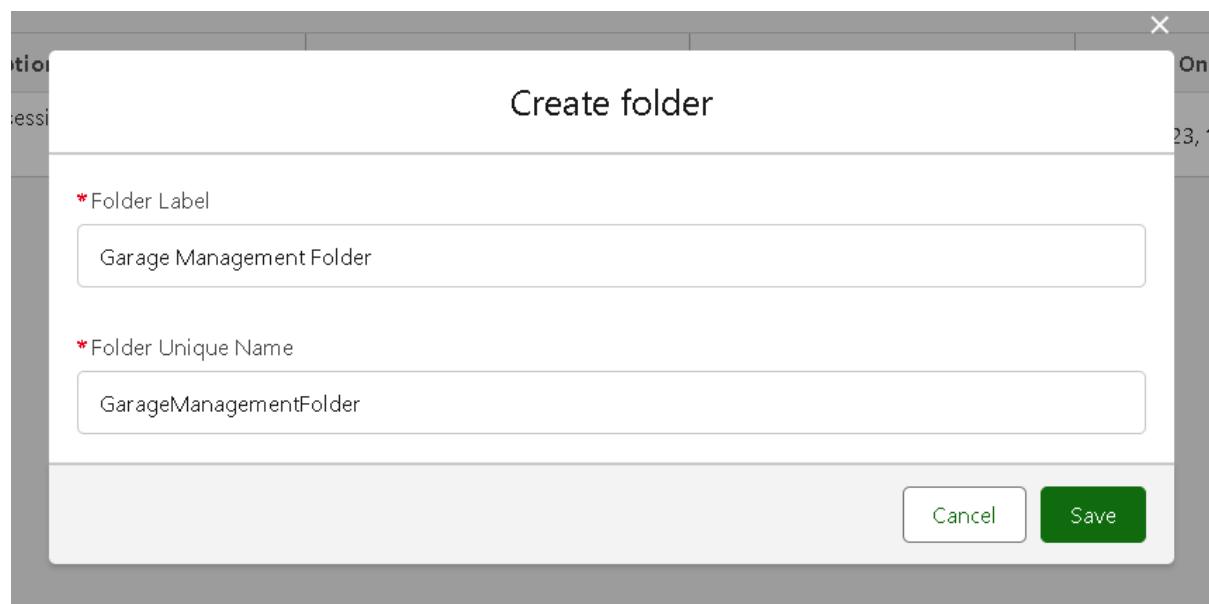
Before building, reading, and sharing reports, review these reporting basics.

## Types of Reports in Salesforce

1. Tabular
2. Summary
3. Matrix
4. Joined Reports

## Create a report folder

1. Click on the app launcher and search for reports.
2. Click on the report tab, click on new folder.
3. Give the Folder label as "Garage Management Folder", Folder unique name will be auto populated.
4. Click save.



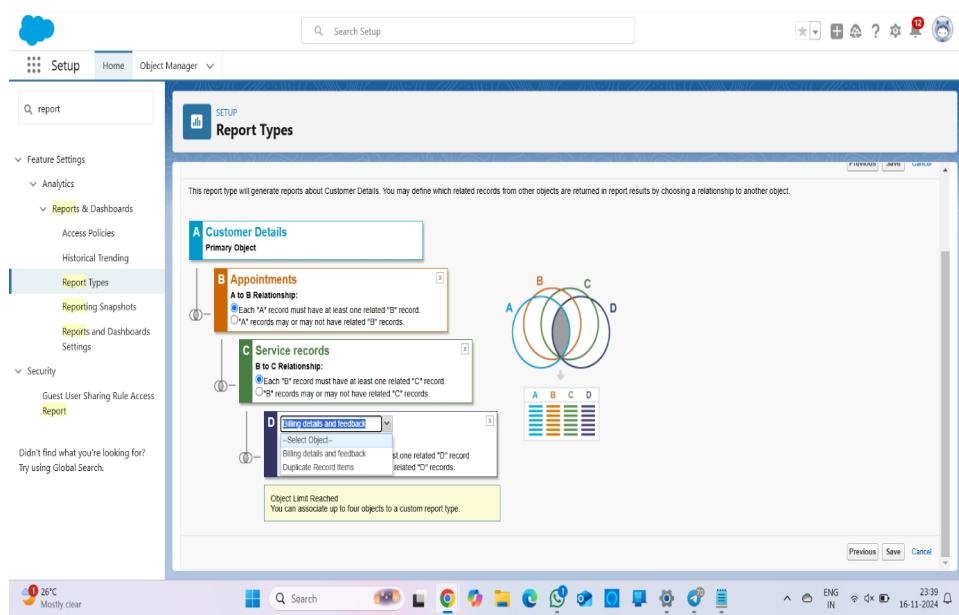
## Sharing a report folder

1. Go to the app >> click on the reports tab.

2. Click on the All folder , click on the Drop down arrow for Garage Management folder, and Click on share.
3. Select the share with as “roles”, in name field search for “manager”, give “view” as access for that role.
4. Then click share, and click on Done.

### **Create Report Type**

1. Go to setup >> type users in quick find box >> select Report Type >> click on Continue.
2. Click on new custom report type.
3. Select the Primary object as “ Customer details” .
4. Give the Report type Label as “ Service information ”
5. Report type Name is autopopulated.
6. Keep the Description as same.
7. Select Store in Category as “ other Reports ”
8. Select the deployment status as “ Deployed ”, click on Next.
9. now , Click on Related object box.
10. Click on Select Object, choose Appointment Object as shown in fig
11. Again Click to relate another object.
12. And select the related object as “ service records”.
13. Repeat the process and select the related object as “ Billing details and feedback”.
14. And click on save.



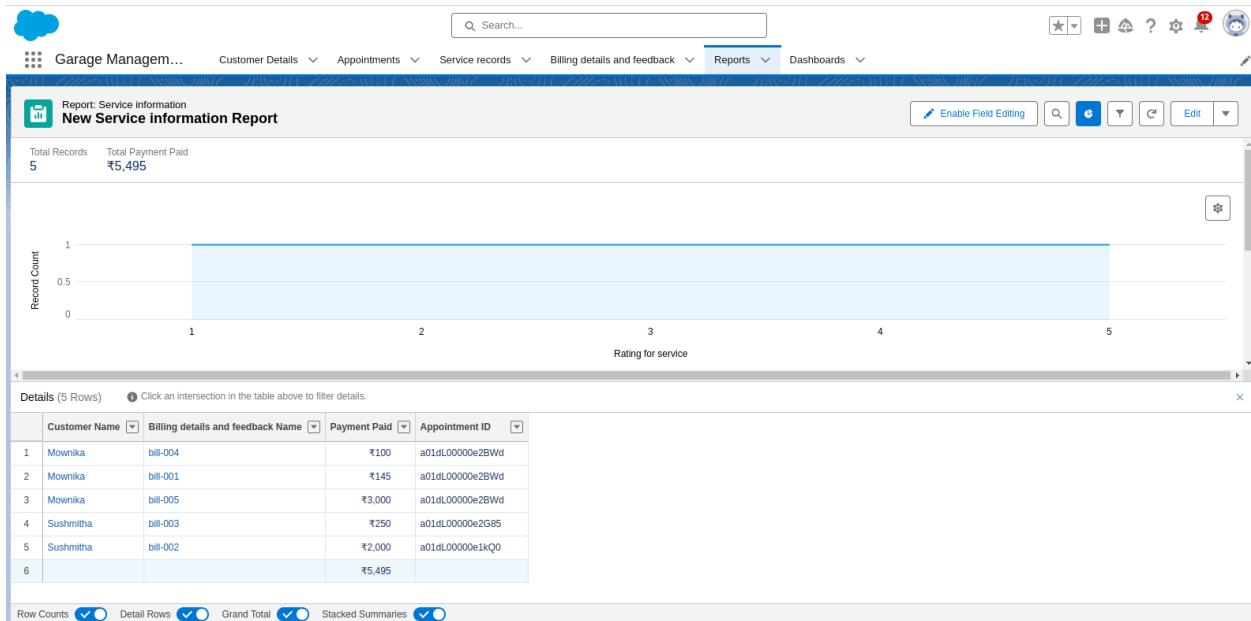
## Create Report

Note : Before creating report, create latest “10” records in every object.

Try to fill every field in each record for better experience.

1. Go to the app >> click on the reports tab
2. Click New Report.
3. Select the Category as other reports, search for Service Information, select that report, click on it. And click on start report.
4. Their outline pane is opened already, select the fields that mentioned below in column section.
  1. Customer name
  2. Appointment Date
  3. Service Status
  4. Payment paid
5. Remove the unnecessary fields.
6. Select the fields that mentioned below in GROUP ROWS section.
  1. Rating for Service

7. Select the fields that mentioned below in GROUP ROWS section.
1. Payment Status
8. Click on Add Chart , Select the Line Chart.
9. Click on save, Give the report Name : New Service information Report
10. Report unique Name is auto populated.
11. Select the folder the created and Click on save.



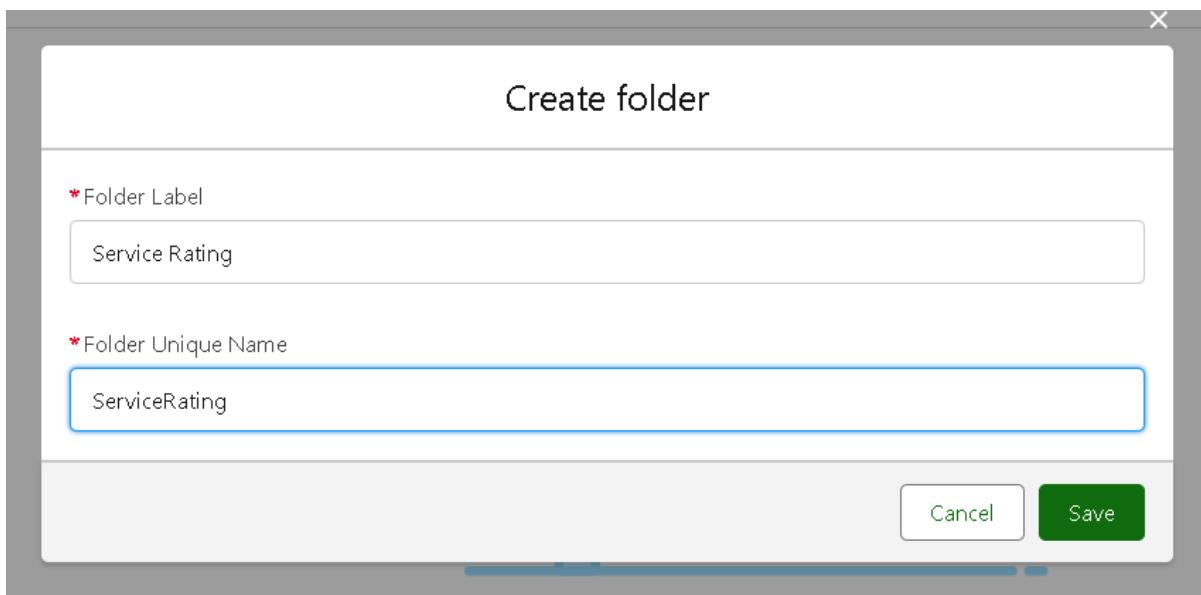
## Dashboards

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

## Create Dashboard Folder

1. Click on the app launcher and search for dashboard.
2. Click on dashboard tab.
3. Click new folder, give the folder label as " Service Rating dashboard".
4. Folder unique name will be auto populated.

5. Click save.
6. Follow the same steps, from milestone 15, and activity 2, and provide the sharing settings for the folder that just created.



### Create Dashboard

1. Go to the app >> click on the Dashboards tabs.
2. Give a Name and select the folder that created, and click on create.
3. Select add component.
4. Select a Report and click on select.
5. Select the Line Chart. Change the theme.
6. Click Add then click on Save and then click on Done.
7. Preview is shown below.

### Add Widget

100

Title  
New Service information Report

Subtitle

Footer

Legend Position  
Right

Widget Theme  
 Light (Dashboard default)  
  
 Dark  


Preview

New Service information Report

Sum of Payment Paid

Payment Status

Pending ●

Completed ●

₹3k

₹2k

₹1k

₹0

Rating for service

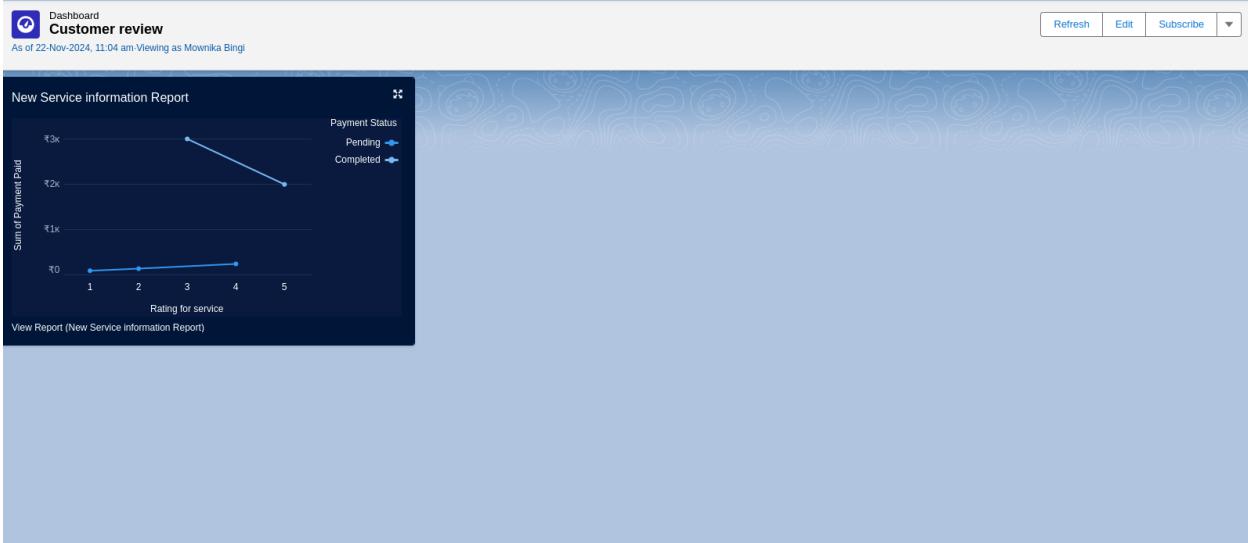
1 2 3 4 5

View Report (New Service information Report)

[Cancel](#) [Add](#)

**Subscription:**

1. After that Click on Subscribe on top right.
2. Set the Frequency as “ weekly ”.
3. Set a day as monday.
4. And Click on save.



## Edit Subscription

Schedule dashboard refreshes and subscribe to receive results.

**Settings**

Frequency

Daily   Weekly   Monthly 

Days

Sun   Mon    Tue   Wed   Thu   Fri   Sat

Time

3:00 pm 

**Recipients**

Receive new results by email when dashboard is refreshed. 

Send email to  
Me

[Edit Recipients](#)



[Cancel](#) [Save](#)