

Garage Management system

By

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Project Abstract

The Garage Management System (GMS) is a software tool designed for automotive repair facilities. It aims to enhance the operations of garages by providing features that improve service delivery, increase operational efficiency, and foster strong customer relationships. The system is user-friendly, meaning it's easy to use and navigate, and it comes with powerful features that help garages manage their day-to-day tasks effectively. By using GMS, garages can remain competitive in the market and provide a smooth and satisfying experience for both their customers and staff.

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Task 1: OBJECT

Step 1: Create Customer DetailsObject

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A sidebar on the left lists various object configuration options like Fields & Relationships, Page Layouts, and Lightning Record Pages. The main 'Details' section shows the following configuration for the 'Customer Details' object:

- Description: [empty]
- API Name: Customer__c
- Custom: ✓
- Singular Label: Customer Details
- Plural Label: Customer Details
- Enable Reports: ✓
- Track Activities: ✓
- Track Field History: ✓
- Deployment Status: Deployed
- Help Settings: Standard salesforce.com Help Window

At the bottom right of the details section are 'Edit' and 'Delete' buttons.

Step 2: Create Appointment Object

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. A sidebar on the left lists various object configuration options like Fields & Relationships, Page Layouts, and Lightning Record Pages. The main 'Details' section shows the following configuration for the 'Appointment' object:

- Description: [empty]
- API Name: Appointment__c
- Custom: ✓
- Singular Label: Appointment
- Plural Label: Appointments
- Enable Reports: ✓
- Track Activities: ✓
- Track Field History: ✓
- Deployment Status: Deployed
- Help Settings: Standard salesforce.com Help Window

At the bottom right of the details section are 'Edit' and 'Delete' buttons.

Step 3: Create Service records Object

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various configuration options under 'Details'. The main 'Details' section shows the following configuration for the 'Service records' object:

- Description: [empty]
- API Name: Service_records_c
- Custom: ✓
- Singular Label: Service records
- Plural Label: Service records
- Enable Reports: ✓
- Track Activities: ✓
- Track Field History: ✓
- Deployment Status: Deployed
- Help Settings: Standard salesforce.com Help Window

At the top right, there are 'Edit' and 'Delete' buttons.

Step 4: Create Billing details and feedback Object

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various configuration options under 'Details'. The main 'Details' section shows the following configuration for the 'Billing details and feedback' object:

- Description: [empty]
- API Name: Billing_details_and_feedback_c
- Custom: ✓
- Singular Label: Billing details and feedback
- Plural Label: Billing details and feedback
- Enable Reports: ✓
- Track Activities: ✓
- Track Field History: ✓
- Deployment Status: Deployed
- Help Settings: Standard salesforce.com Help Window

At the top right, there are 'Edit' and 'Delete' buttons.

Task 2: TABS

Step 1: Creating a Custom Tabs

The screenshot shows the Salesforce Setup interface with the URL <https://instituteoftechnologyandm-b-dev-ed-develop.lightning.force.com/lightning/setup/CustomTabs/home>. The page title is "Custom Tabs". It includes a search bar and a toolbar with various icons. On the left, there's a sidebar with "User Interface" and "Tabs" selected. The main content area displays three sections: "Custom Object Tabs", "Web Tabs", and "Visualforce Tabs". The "Custom Object Tabs" section lists several tabs with their labels and styles:

Action	Label	Tab Style	Description
Edit Del	Appointments	Apple	
Edit Del	Billing details and feedback	Chess piece	
Edit Del	Customer Details	Dice	
Edit Del	Service records	Globe	

Task 3: The Lightning App

Step 1: Create a Lightning App

The screenshot shows the Lightning App Builder interface with the URL <https://instituteoftechnologyandm-b-dev-ed-develop.lightning.force.com/visualforce/editor/appBuilder.app?id=02uNS000000QjYAC&retURL=https%3A%2F%2Finstituteoftechnologyandm-b-dev-ed.devel...>. The page title is "Lightning App Builder". The left sidebar shows "App Settings" and "App Details & Branding" is selected. The main content area is titled "App Details & Branding" and contains fields for "App Name" (Garage Management Application), "Developer Name" (Garage_Management_Application), and "Description" (Enter a description...). It also includes "App Branding" settings for "Image" (Upload button) and "Primary Color Hex Value" (#0070D2). A "Org Theme Options" checkbox is present. Below this is the "App Launcher Preview" which shows a blue square with "GM" and the text "Garage Management Appl...".

The screenshot shows the Lightning App Builder interface with the URL <https://instituteoftechnologyandm-b-dev-ed-develop.lightning.force.com/visualEditor/appBuilder.app?id=02uNS000000QgjYAC&retUrl=https%3A%2F%2Finstituteoftechnologyandm-b-dev-ed.devel...>. The page title is "Garage Management Application". The left sidebar has sections: "App Settings" (App Details & Branding, App Options, Utility Items (Desktop Only)), "Navigation Items" (selected), and "User Profiles". The main content area is titled "Navigation Items" with a sub-instruction: "Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support." It shows two lists: "Available Items" (Accounts, All Sites, Alternative Payment Methods, Analytics, App Launcher, Appointment Categories, Appointment Invitations, Approval Requests, Asset Action Sources, Asset Actions) and "Selected Items" (Customer Details, Appointments, Service records, Billing details and feedback). Navigation arrows allow items to be moved between lists.

Task 4: FIELDS

Step 1: Creation of fields for the Customer Details object

The screenshot shows the Salesforce Object Manager interface with the URL <https://instituteoftechnologyandm-b-dev-ed-develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000007Mf/fieldsAndRelationships/view>. The top navigation bar includes "Setup", "Home", and "Object Manager". The left sidebar lists: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled "Customer Details" under "SETUP > OBJECT MANAGER". It shows the "Fields & Relationships" section with 6 items, sorted by Field Label. The table columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data is as follows:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedBy	Lookup(User)		
Customer Name	Name	Text(80)		
Gmail	Gmail__c	Email		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		
Phone number	Phone_number__c	Phone		

Step 2: Creation of Lookup Fields

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Home, Object Manager, and a search bar. The main title is "Appointment". On the left, a sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The "Fields & Relationships" option is selected. The main content area displays the "Customer Details" custom field definition for the Appointment object. The "Field Information" section shows the field label "Customer Details", field name "Customer_Details", API name "Customer_Details__c", and data type "Lookup" (Object Name: Appointment). The "Lookup Options" section indicates the field is related to "Customer Details" and "Appointments", with "Required" checked. A note at the bottom states "What to do if the lookup record is deleted? Clear the value of this field.".

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Home, Object Manager, and a search bar. The main title is "Service records". On the left, a sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The "Fields & Relationships" option is selected. The main content area displays the "Appointment" custom field definition for the Service records object. The "Field Information" section shows the field label "Appointment", field name "Appointment", API name "Appointment__c", and data type "Lookup" (Object Name: Service_records). The "Lookup Options" section indicates the field is related to "Appointment" and "Service records", with "Required" checked. A note at the bottom states "What to do if the lookup record is deleted? Don't allow deletion of the lookup record that's part of a lookup relationship.".

The screenshot shows the Salesforce Setup interface under the Object Manager. A custom field named "Billing details and feedback" is being created for the "Service records" object. The field is defined as a lookup type with the API name "Service_records__c". It has a description and is categorized under "Billing details and feedback". The field was created by Muskan Lodhi on 30/07/2024 at 5:24 pm.

Step 3: Creation of Checkbox Fields

The screenshot shows the Salesforce Setup interface under the Object Manager. A custom field named "Maintenance service" is being created for the "Appointment" object. The field is defined as a checkbox type with the API name "Maintenance_service__c". It has a description and is categorized under "Maintenance service". The field was created by Muskan Lodhi on 30/07/2024 at 5:26 pm. The default value is set to "Unchecked".

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes the Salesforce logo, a search bar labeled 'Search Setup', and various system icons. The main title is 'SETUP > OBJECT MANAGER'. Below it, the specific object being edited is 'Appointment'. A sidebar on the left lists various setup categories like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The current tab is 'Fields & Relationships'. The main content area is titled 'Appointment Custom Field Replacement Parts'. It shows the 'Custom Field Definition Detail' for the field 'Replacement Parts'. The field information includes: Field Label: 'Replacement Parts', Field Name: 'Replacement_Parts', API Name: 'Replacement__Parts__c', Description: ' ', Help Text: ' ', Data Owner: ' ', Field Usage: ' ', Data Sensitivity Level: ' ', Compliance Categorization: ' ', Created By: 'Muskan Lodhi' on 09/08/2024, 10:33 pm, and Modified By: 'Muskan Lodhi' on 09/08/2024, 10:33 pm. The 'Object Name' is 'Appointment' and 'Data Type' is 'Checkbox'. There are tabs for 'Validation Rules', 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. Below the field information, there are sections for 'General Options' (Default Value: 'Unchecked') and 'Field Dependencies' (which is currently empty). A 'Help for this Page' link is also present.

This screenshot shows the Salesforce Object Manager interface, similar to the previous one but for a different object. The top navigation bar, sidebar, and main title 'SETUP > OBJECT MANAGER' are identical. The object being edited is 'Service records'. The sidebar shows the same setup categories. The current tab is 'Fields & Relationships'. The main content area is titled 'Service records Custom Field Quality Check Status'. It shows the 'Custom Field Definition Detail' for the field 'Quality Check Status'. The field information includes: Field Label: 'Quality Check Status', Field Name: 'Quality_Check_Status', API Name: 'Quality_Check_Status__c', Description: ' ', Help Text: ' ', Data Owner: ' ', Field Usage: ' ', Data Sensitivity Level: ' ', Compliance Categorization: ' ', Created By: 'Muskan Lodhi' on 30/07/2024, 5:27 pm, and Modified By: 'Muskan Lodhi' on 30/07/2024, 5:27 pm. The 'Object Name' is 'Service records' and 'Data Type' is 'Checkbox'. There are tabs for 'Validation Rules', 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. Below the field information, there are sections for 'General Options' (Default Value: 'Unchecked') and 'Field Dependencies' (which is currently empty). A 'Help for this Page' link is also present.

Step 4: Creation of date Fields

The screenshot shows the Salesforce Object Manager interface. The left sidebar is titled 'FIELDS & RELATIONSHIPS'. The main content area is titled 'Appointment Custom Field' and 'Appointment Date'. The 'Field Information' section shows the field label 'Appointment Date', field name 'Appointment_Date', API name 'Appointment_Date__c', object name 'Appointment', and data type 'Date'. The 'General Options' section has 'Required' checked. The 'Validation Rules' section indicates 'No validation rules defined'. The page includes standard Salesforce navigation and search bars at the top.

Step 5: Creation of Currency Fields

The screenshot shows the Salesforce Object Manager interface. The left sidebar is titled 'FIELDS & RELATIONSHIPS'. The main content area is titled 'Appointment Custom Field' and 'Service Amount'. The 'Field Information' section shows the field label 'Service Amount', field name 'Service_Amount', API name 'Service_Amount__c', object name 'Appointment', and data type 'Currency'. The 'General Options' section has 'Required' unchecked. The 'Currency Options' section shows length set to 18 and decimal places set to 0. The page includes standard Salesforce navigation and search bars at the top.

Step 6: Creation of Text Fields

instituteoftechnologyandm-b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000007g1/FieldsAndRelationships/00NNS000000ISie/view

Billing details and feedback

Payment Paid

Custom Field Definition Detail

Field Label	Field Name	Object Name	Data Type
Payment Paid	Payment_Paid	Billing_details_and_feedback	Currency

Field Information

Created By	Modified By
Muskan Lodhi	Muskan Lodhi

General Options

Required
<input type="checkbox"/>

Currency Options

Length	Decimal Places
18	0

Help for this Page

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
- Scoping Rules

instituteoftechnologyandm-b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS000000gyr8/FieldsAndRelationships/00NNS000000IXS9/view

Appointment

Vehicle number plate

Custom Field Definition Detail

Field Label	Field Name	Object Name	Data Type
Vehicle number plate	Vehicle_number_plate	Appointment	Text

Field Information

Created By	Modified By
Muskan Lodhi	Muskan Lodhi

General Options

Required	Unique	Case Sensitive	External ID	Default Value
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Help for this Page

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
- Scoping Rules

The screenshot shows the Salesforce Setup interface under the Object Manager. A custom field named "Rating for service" has been created. The field details are as follows:

- Field Label:** Rating for service
- Field Name:** Rating_for_service
- API Name:** Rating_for_service_c
- Description:** (empty)
- Help Text:** (empty)
- Data Owner:** (empty)
- Field Usage:** (empty)
- Data Sensitivity Level:** (empty)
- Compliance Categorization:** (empty)
- Created By:** Muskan Lohit, 30/07/2024, 5:36 pm
- Modified By:** Muskan Lohit, 31/07/2024, 5:00 pm

The "General Options" section includes:

- Required: checked
- Unique: unchecked
- Case Sensitive: unchecked
- External ID: unchecked
- Default Value: (empty)

Step 7: Creation of Picklist Fields

The screenshot shows the Salesforce Setup interface under the Object Manager. A custom field named "Service Status" has been created. The field details are as follows:

- Field Label:** Service Status
- Field Name:** Service_Status
- API Name:** Service_Status_c
- Description:** (empty)
- Help Text:** (empty)
- Data Owner:** (empty)
- Field Usage:** (empty)
- Data Sensitivity Level:** (empty)
- Compliance Categorization:** (empty)
- Created By:** Muskan Lohit, 30/07/2024, 5:40 pm
- Modified By:** Muskan Lohit, 30/07/2024, 5:40 pm

The "General Options" section includes:

- Required: unchecked
- Default Value: (empty)

The "Picklist Options" section includes:

- Restrict picklist to the values defined in the value set: checked

The screenshot shows the Salesforce Setup interface under the Object Manager. A custom field named 'Payment Status' is being created for the 'Billing details and feedback' object. The field is of type Picklist and has a single value: 'Paid'. The 'Field Label' is 'Payment Status' and the 'API Name' is 'Payment_Status__c'. The 'Object Name' is 'Billing details and feedback' and the 'Data Type' is 'Picklist'. The field was created by Muskan Lodhi on 30/07/2024 at 5:41 pm.

Step 8: Creating Formula Field in Service records Object

The screenshot shows the Salesforce Setup interface under the Object Manager. A formula field named 'service date' is being created for the 'Service records' object. The field is of type Formula and uses the formula 'CreatedDate'. The 'Field Label' is 'service date' and the 'API Name' is 'service_date__c'. The 'Object Name' is 'Service records' and the 'Data Type' is 'Formula'. The field was created by Muskan Lodhi on 30/07/2024 at 5:44 pm.

Task 5: Validation rule

Step1: To create a validation rule to an Appointment Object

The screenshot shows the Salesforce Object Manager interface for creating a validation rule for the 'Appointment' object. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, etc. The main panel displays the 'Appointment Validation Rule' detail page. The validation rule is named 'Vehicle' and is active. The error condition formula is set to NOT(REGEX(Vehicle_number_plate__c , "[A-Z]{2}(0-9){2}[A-Z]{2}(0-9){4}")) and the error message is 'Please enter valid number'. The error location is 'Vehicle number plate'. The rule was created by Muskan Lodhi on 30/07/2024, 5:46 pm.

Step 2: To create a validation rule to an Service records Object

The screenshot shows the Salesforce Object Manager interface for creating a validation rule for the 'Service records' object. The left sidebar lists various configuration options. The main panel displays the 'Service records Validation Rule' detail page. The validation rule is named 'service_status_note' and is active. The error condition formula is NOT(ISPICKVAL(Service_Status__c , "Completed")) and the error message is 'still it is pending'. The error location is 'Service Status'. The rule was created by Muskan Lodhi on 30/07/2024, 5:47 pm.

Step 3: To create a validation rule to an Billing details and feedback Object

The screenshot shows the Salesforce Object Manager interface. On the left, a sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, and Lightning Record Pages. The main content area is titled "Billing details and feedback Validation Rule". It displays a single validation rule named "rating_should_be_less_than_5". The rule's formula is "NOT(REGEX(Rating_for_service__c , '[1-5](1)'))". The error message is "rating should be from 1 to 5". The rule is active and was created by Muskan Lodhi on 30/07/2024 at 5:48 pm. The "Edit" and "Clone" buttons are visible at the top right of the rule's card.

Task 6: Duplicate rule

Step 1: To create a matching rule to an Customer details Object

The screenshot shows the Matching Rules page in the Salesforce Setup. The sidebar on the left has a search bar and links for Data, Duplicate Management, and Matching Rules. The main content area is titled "Matching customer details". It shows a matching rule named "Matching customer details" for the "Customer Details" object. The rule's formula is "(Customer_Details__c: Email EXACT MatchBlank = FALSE) AND (Customer_Details__c: Phone_number EXACT MatchBlank = FALSE)". The rule is active and was created by Muskan Lodhi on 30/07/2024 at 5:49 pm. The "Delete", "Clone", and "Deactivate" buttons are visible at the top right of the rule's card.

Step 2: To create a Duplicate rule to an Customer details Object

The screenshot shows the 'Duplicate Rules' setup page for a 'Customer Detail duplicate' rule. The rule is named 'Customer Detail duplicate' and is set to 'Customer Details'. It uses 'Enforce sharing rules' for Record Level Security and allows 'Allow' for both Action On Create and Action On Edit. The Active checkbox is checked. The Matching Rule is set to 'Matching customer details' with 'Mapped' selected. The Matching Criteria section contains the condition '(Customer Details: Email EXACT MatchBlank = FALSE) AND (Customer Details: Phone_number EXACT MatchBlank = FALSE)'. The rule was created by 'Muskan Lohi' on 30/07/2024, 5:51 pm and modified by the same user on 30/07/2024, 5:51 pm.

Task 7: PROFILES

Step 1: Manager Profile

The screenshot shows the 'Profiles' setup page for the 'Manager' profile. The profile description states that users with this profile have specific permissions and page layouts. It includes sections for 'Enabled Custom Setting Definitions Access' (no custom settings enabled), 'Page Layouts' (Standard Object Layouts for Global, Email Application, Home Page Layout, Account, and Alternative Payment Method), and 'Location Group Assignment' (Macro, Object Milestone, Operating Hours, and Opportunity). The profile was created by 'Muskan Lohi' on 30/07/2024, 10:30 pm and modified by the same user on 09/08/2024, 10:33 pm.

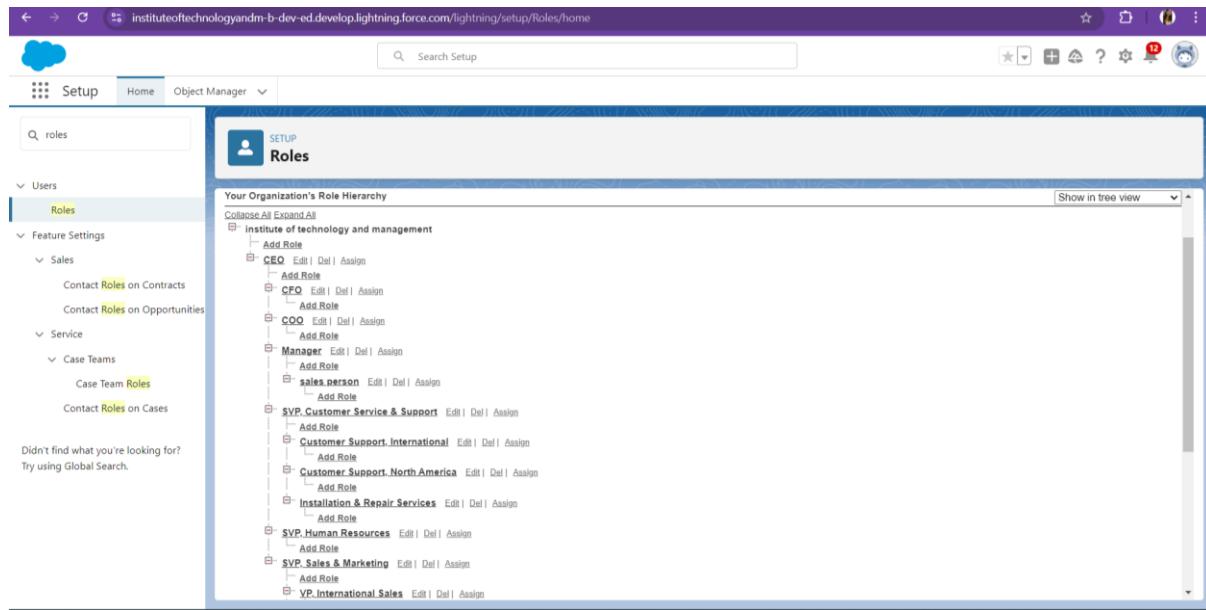
The screenshot shows the Salesforce Setup interface for managing Profiles. The left sidebar shows 'Users' and 'Profiles'. The main content area is titled 'Profiles' and displays 'Session Settings' and 'Password Policies'. Under 'Session Settings', 'Session Times Out After' is set to '8 hours of inactivity'. Under 'Password Policies', various security rules are listed, such as 'User passwords expire in' (Never expires), 'Enforce password history' (3 passwords remembered), and 'Minimum password length' (8). Other settings include 'Password complexity requirement' (Must include alpha and numeric characters), 'Password question requirement' (Cannot contain password), 'Maximum invalid login attempts' (10), and 'Lockout effective period' (15 minutes). There are also options for 'Obscure secret answer for password resets' and 'Require a minimum 1 day password lifetime'. A note at the bottom says 'Don't immediately expire links in forgot password emails'. Below this are buttons for 'Edit', 'Clone', 'Delete', and 'View Users'. Further down are sections for 'Login Hours' and 'Login IP Ranges'.

Step 2: sales person Profile

The screenshot shows the Salesforce Setup interface for managing Profiles. The left sidebar shows 'Users' and 'Profiles'. The main content area is titled 'Profiles' and displays a specific profile named 'sales person'. The profile details are as follows: Name (sales person), User License (Salesforce Platform), Custom Profile (checked), Description, Created By (Muskan Lodhi, 31/07/2024, 12:48 pm), and Modified By (Muskan Lodhi, 09/08/2024, 10:50 pm). Below this is a section for 'Page Layouts' under 'Standard Object Layouts', showing assignments for Global, Lead, Location, Location Group, and Object Milestone layouts across various objects like Global, Email Application, Home Page Layout, Account, and Alternative Payment Method.

Task 8: Role & Role Hierarchy

Step 1: Creating Manager And Other Roles



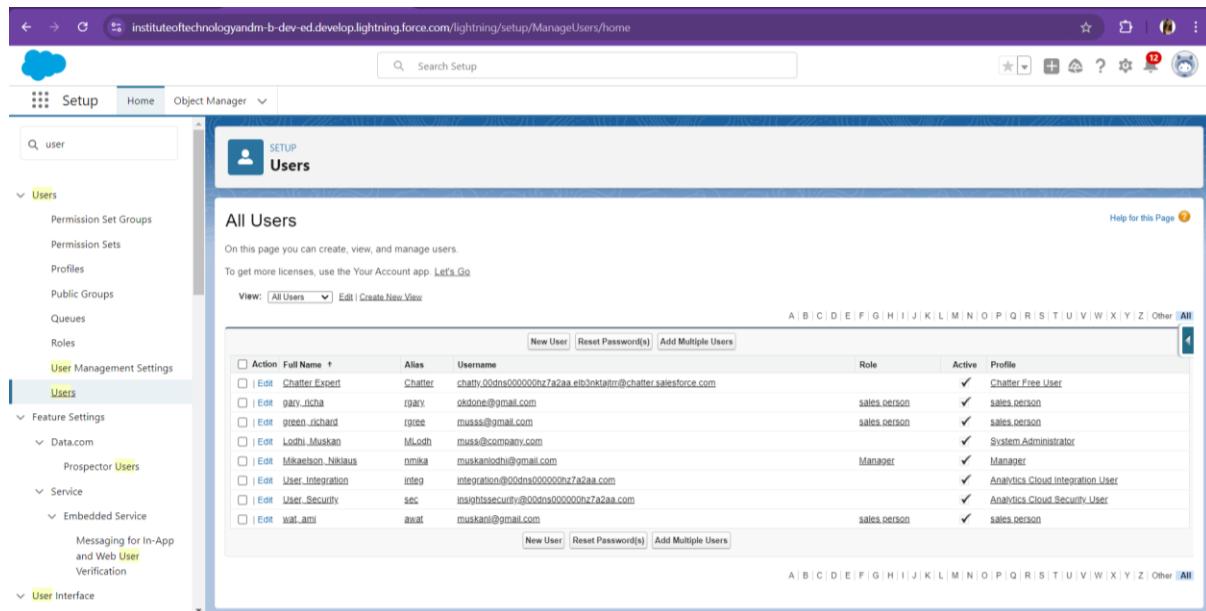
The screenshot shows the Salesforce Setup Roles page. On the left, there's a sidebar with a search bar and sections for Users (Roles is selected), Feature Settings, Sales, Service, and Case Teams. The main area displays a hierarchical tree of roles under 'Your Organization's Role Hierarchy'. The hierarchy includes the following roles:

- Institute of technology and management
 - CEO
 - CFO
 - COO
 - Manager
 - sales_person
 - SVP, Customer Service & Support
 - Customer Support, International
 - Customer Support, North America
 - Installation & Repair Services
 - SVP, Human Resources
 - SVP, Sales & Marketing
 - VP, International Sales

Each role has 'Edit | Del | Assign' options next to it.

Task 9: Users

Step 1: Create Users



The screenshot shows the Salesforce Setup Users page. On the left, there's a sidebar with a search bar and sections for Users (Users is selected), Feature Settings, Data.com, Service, and Embedded Service. The main area displays a table titled 'All Users' with the following data:

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty@00dns000000007a2aa.elb0inktaimr@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	gary_nicha	rgary	okdone@gmail.com		<input checked="" type="checkbox"/>	sales_person
<input type="checkbox"/>	green.richard	rgree	mussa@gmail.com		<input checked="" type="checkbox"/>	sales_person
<input type="checkbox"/>	Lodhi Muskan	M.Lodh	muss@company.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Mikaelson Niklaus	nmika	muskaniodhi@gmail.com	Manager	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	User Integration	integ	integration@00dns000000007a2aa.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00dns000000007a2aa.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User
<input type="checkbox"/>	wat_ami	awat	muskani@gmail.com		<input checked="" type="checkbox"/>	sales_person

At the bottom, there are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

Task 10: Public groups

Step 1: Creating New Public Group

The screenshot shows the Salesforce Setup interface. On the left, the navigation sidebar is open, showing categories like Users, Feature Settings, and User Interface. Under the 'Users' category, 'Public Groups' is selected. The main content area displays a 'SETUP Public Groups' page for a group named 'sales team'. The group details include a Label ('sales team'), Group Name ('sales_team'), and 'Grant Access Using Hierarchies' checked. The group was created by 'Muskan Lodhi' on 31/07/2024, 12:53 pm, and modified by the same user at the same time. A table below lists a single member: 'Name' (sales_person) and 'Type' (Role). The URL in the browser bar is <https://instituteoftechnologyandm-b-dev-ed.develop.lightning.force.com/lightning/setup/PublicGroups/page?address=%2Fsetup%2Fown%2Fgroupdetail.jsp%3Fid%3D00GN50000N7sON>.

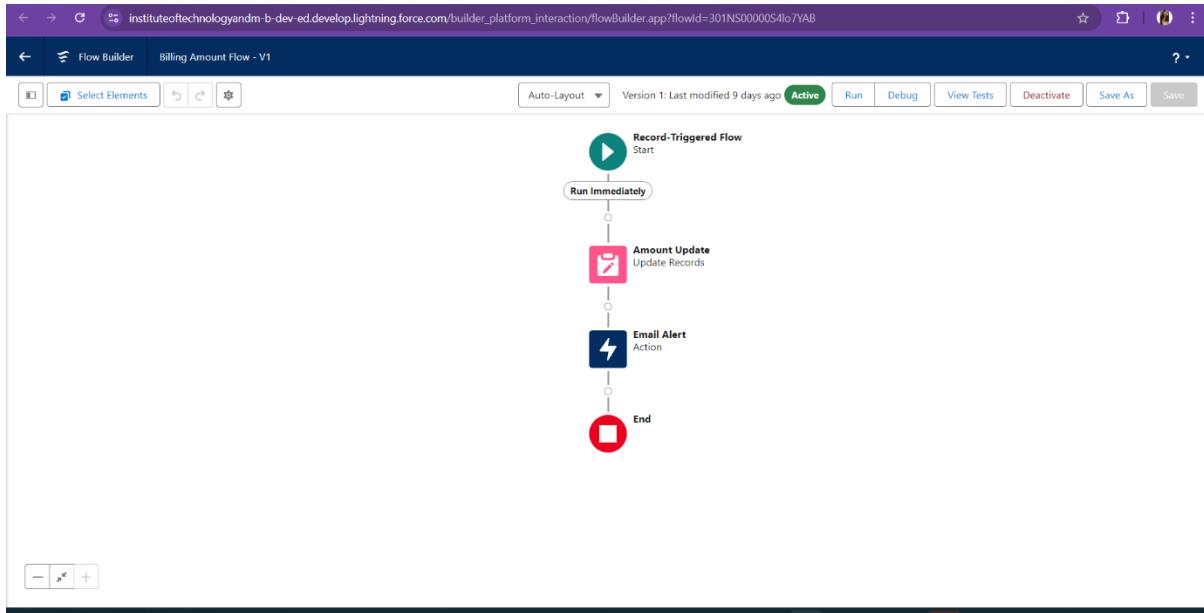
Task 11: Sharing Setting

Step 1: Creating Sharing settings

The screenshot shows the Salesforce Setup interface. The navigation sidebar is open, showing categories like Security and Sharing. Under the 'Sharing' category, 'Sharing Settings' is selected. The main content area displays a 'SETUP Sharing Settings' page for a 'Service records Sharing Rule'. The rule is titled 'Sharing setting' and has a Rule Name of 'Sharing_setting'. It is described as 'Sharing rules to make automatic exceptions to your organization-wide sharing settings for defined sets of users.' A note states that 'Roles and subordinates' includes all users in a role, and the roles below that role. A note also says you can use sharing rules only to grant wider access to data, not to restrict access. The rule is owned by members of 'Role: sales person'. It is shared with 'Role: Manager' and has an 'Access Level' of 'Read/Write'. The rule was created by 'Muskan Lodhi' on 31/07/2024, 1:02 pm, and modified by the same user at the same time. The URL in the browser bar is <https://instituteoftechnologyandm-b-dev-ed.develop.lightning.force.com/lightning/setup/SecuritySharing/page?address=%2Fsetup%2Fown%2FshareRule.jsp%3Fid%3D02eNS0000000K8d%26entity%3Da02%26retURL%3D%252f%252fown%252fOrgSharingDetail%253fretURL%253D%25252fsetup%25252fhome%2526appLayout%253D%2526tour%253D%2526fdcFrameOn...>.

Task 12: Flows

Step 1: Create a Flow



Task 13: Apex Trigger

Step 1: Apex handler

```
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;
            }
        }
    }
}
```

Task 14: Reports

Step 1: create a report folder

The screenshot shows the Salesforce Lightning interface for creating a report folder. The URL in the address bar is <https://instituteoftechnologyandm-b-dev-ed.lightning.force.com/lightning/r/folder/00INS00000QXCYA/view?queryScope=userFolders>. The page title is "All Folders > Garage Management Folder". A search bar at the top right contains "Search...". Below it are buttons for "New Report" and "New Folder". On the left, a sidebar menu under "REPORTS" shows "All Folders" selected. The main content area displays a table with one item:

REPORTS	Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Service information Report		Garage Management Folder	Muskan Lodhi	31/7/2024, 5:18 pm	

Step 2: Sharing a report folder

The screenshot shows the Salesforce Lightning interface for sharing a report folder. The URL in the address bar is <https://instituteoftechnologyandm-b-dev-ed.lightning.force.com/lightning/c/Report/home?queryScope=userFolders>. A modal window titled "Share folder" is open. It says "These sharing settings apply to all subfolders in this folder." Under "Share With", "Users" is selected. In the "Names" section, there is a search bar "Search Users..." and a "View" button. Below it is a "Share" button. Under "Who Can Access", there is a "Manage" button next to a user entry for "Muskan Lodhi" and a "View" button next to a role entry for "Manager". At the bottom right of the modal is a "Done" button.

Step 3: Create Report Type

Step 4: Create Report

Rating for service	Payment Status	Customer Name	Appointment Name	Service Status	Payment Paid
3 (2)	Pending (2)	kaushal Vrathe	app-002	Completed	₹555
		Harsh	app-009	Completed	₹657
					₹1,212
Subtotal					₹1,212
4 (5)	Pending (1)	Lareb rayeen	app-006	Completed	₹789
					₹789
Subtotal					₹789
Completed (4)		veer roy	app-001	Completed	₹568

Task 15: Dashboards

Step 1: Create Dashboard Folder

All Folders > Service Rating

Name	Description	Folder	Created By	Created On	Subscribed
Customer review		Service Rating	Muskan Lodhi	31/7/2024, 5:25 pm	✓

DASHBOARDS

- Recent
- Created by Me
- Private Dashboards
- All Dashboards

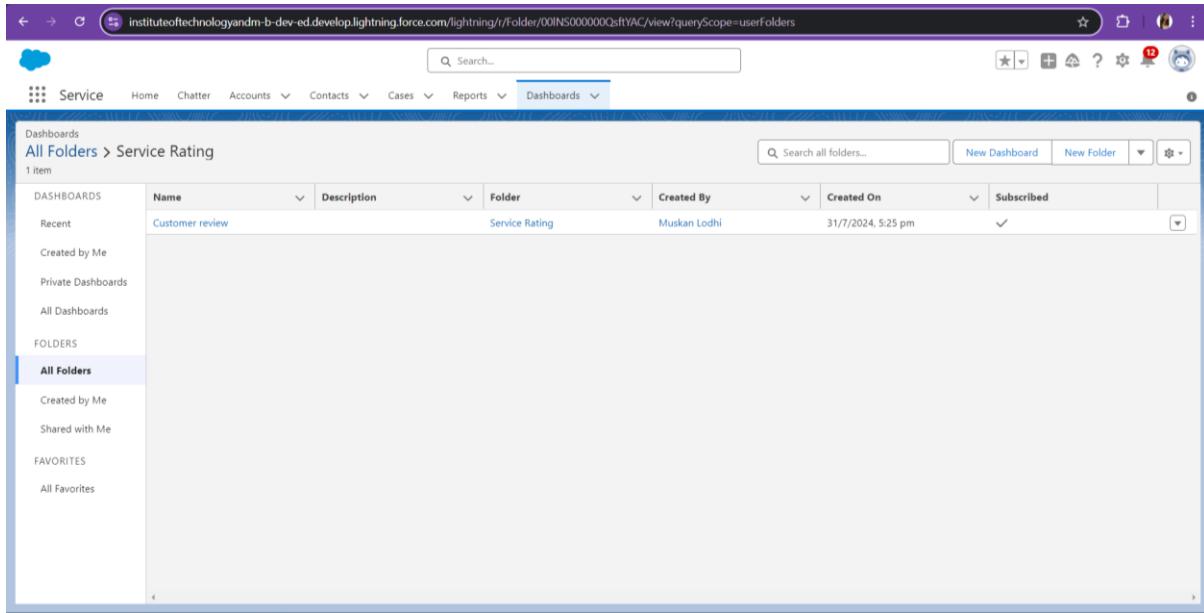
FOLDERS

- All Folders
- Created by Me
- Shared with Me

FAVORITES

- All Favorites

Search all folders... New Dashboard New Folder



Step 2: Create Dashboard

Customer review

As of 09-Aug-2024, 11:18 pm Viewing as Muskan Lodhi

New Service information Report

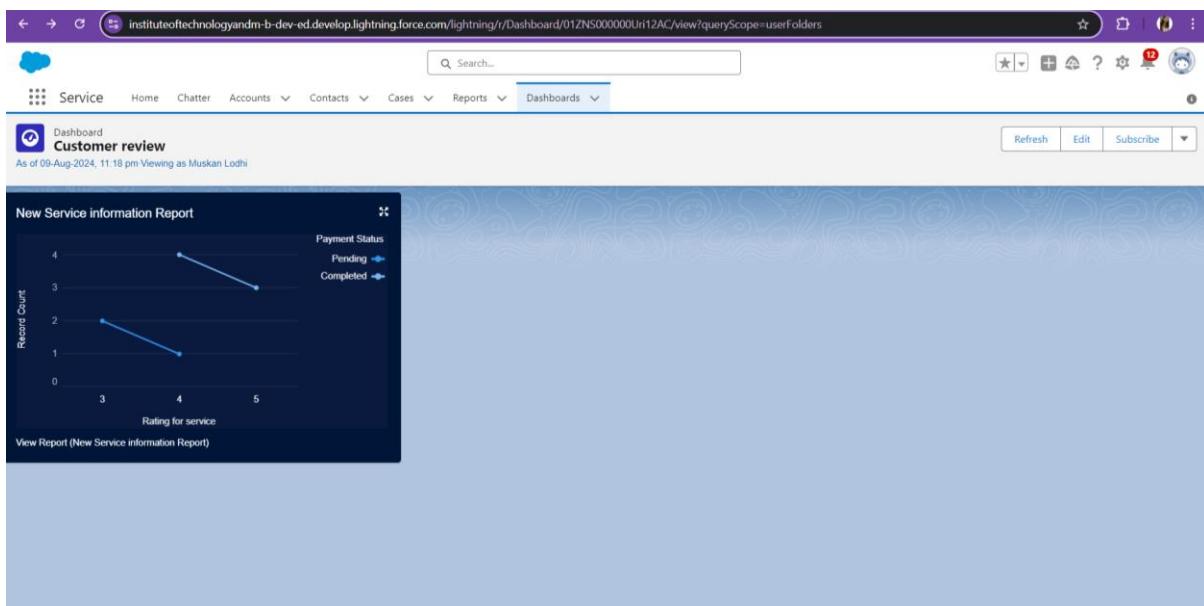
Record Count

Rating for service

Payment Status

- Pending
- Completed

View Report (New Service information Report)



Thank you