

Garage Management System

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A Garage Management System (GMS) is a powerful tool that can overturn your automotive repair business. By streamlining operations, increasing efficiency, and enhancing customer satisfaction, a GMS empowers your garage to thrive in today's competitive market.

Key Benefits of a GMS:-

- **Simplified Appointment Scheduling:** Effortlessly manage bookings and optimizes your team's workload.
- **Efficient Vehicle Management:** Tracks vehicle history, maintenance schedules, and real-time status updates.
- **Enhanced Customer Relationships:** Build loyalty through personalized service and timely communication.
- **Optimized Inventory Control:** Streamline parts management and reduce costs.
- **Streamlined Work Order Management:** Create detailed work orders, track progress, and improve job efficiency.
- **Comprehensive Reporting and Analytics:** Gain valuable insights to make informed business decisions.

A GMS is designed to meet the needs of mechanics, service advisors, and business owners alike. With a user-friendly interface and a range of customizable features, a GMS can help your garage operate more smoothly, improve customer satisfaction, and finally boost your bottom line.

It offers a range of features including efficient appointment scheduling, detailed vehicle management, robust customer relationship management, optimized inventory control, streamlined work order management, and insightful reporting and analytics. By automating tasks, reducing errors, and providing valuable insights, a GMS empowers garages to improve productivity, enhance customer satisfaction, and finally drive business growth.

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 have answered yes to any of these questions, then you are 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 will take you through these features and answer the question, "What is Salesforce?".

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, cooperate and engage with employees and partners, and store your data securely in the cloud. So what does it indicate? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

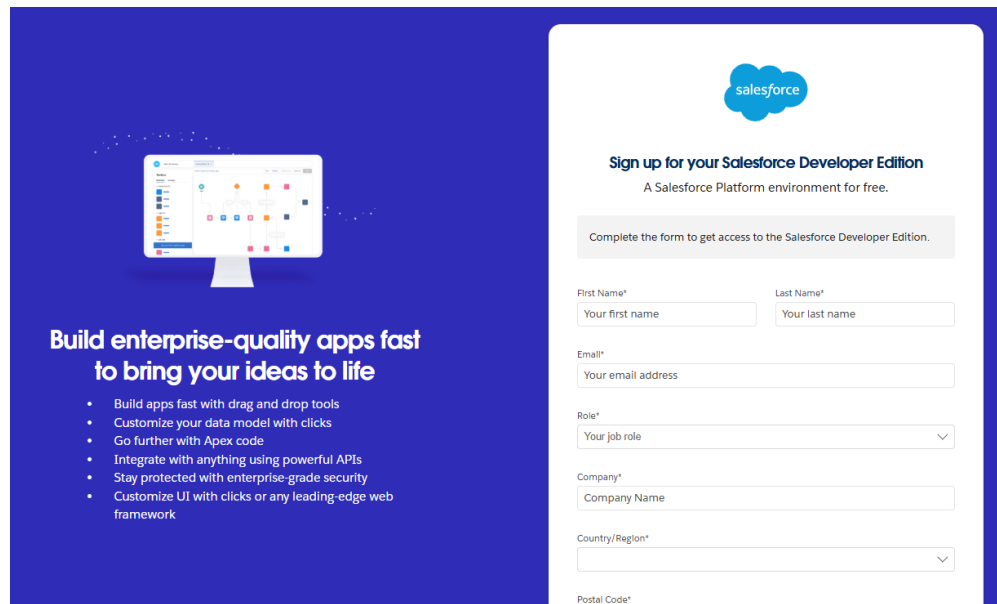
<https://youtu.be/r9EX3lGde5k>

Creating Developer Account:

Creating a developer organization in salesforce:

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details:
 - First name & Last name.
 - Email.
 - Role: Developer.
 - Company: College Name.
 - County: India.
 - Postal Code: pin code.
 - Username : should be a combination of your name and company This need not be an actual email id, you can give anything in the below format:
[username@organization.com](#).

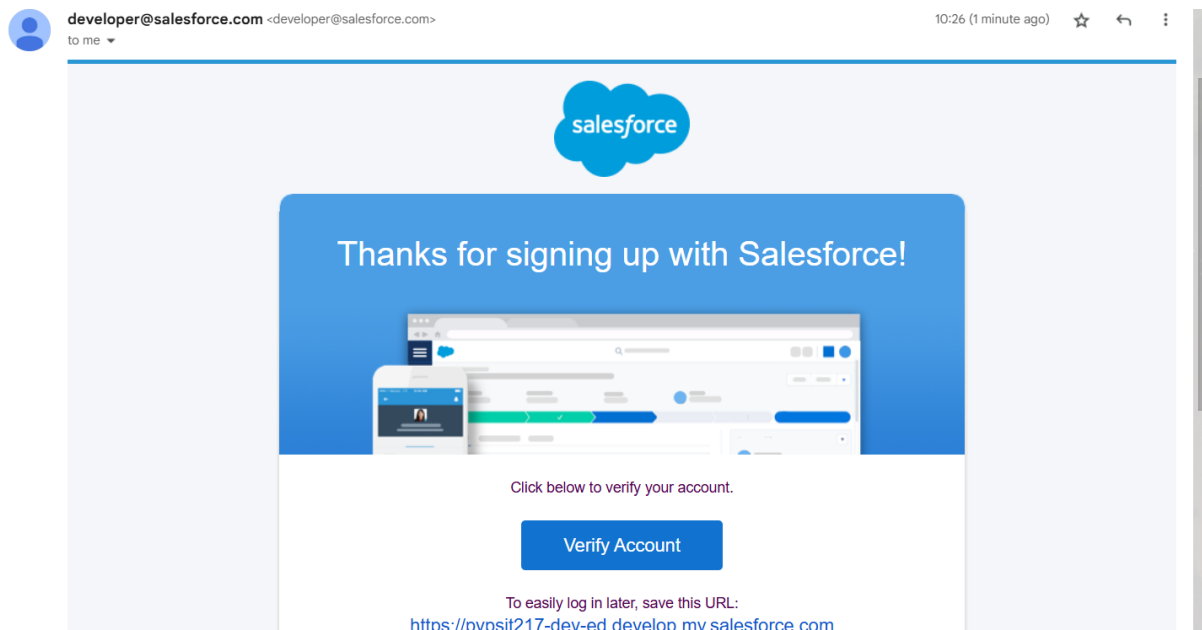
3. Click on sign me up after filling these.



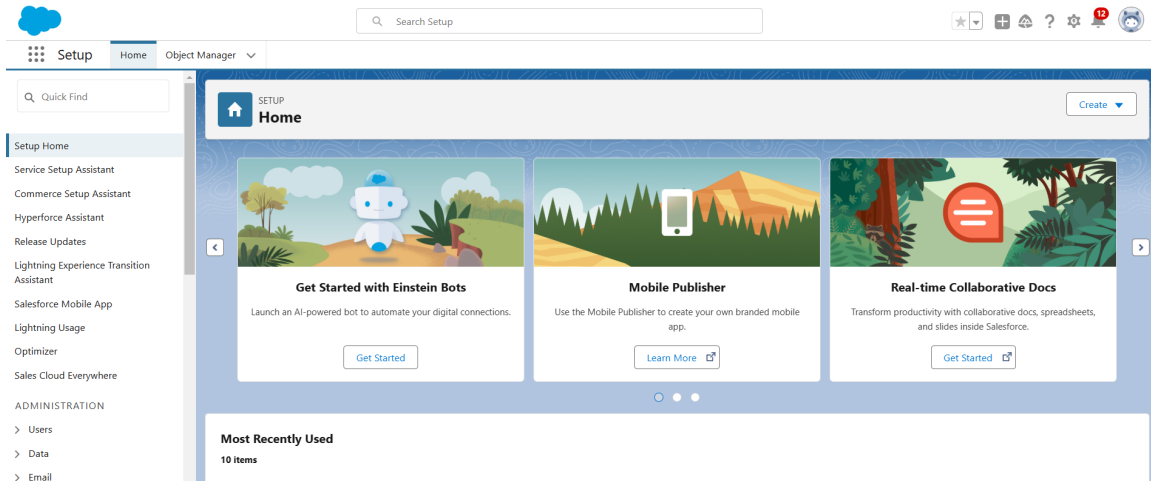
The image shows a sign-up form for the Salesforce Developer Edition. On the left, a blue banner features a monitor icon displaying a Salesforce interface and the text: "Build enterprise-quality apps fast to bring your ideas to life". Below this, a bulleted list highlights features: "Build apps fast with drag and drop tools", "Customize your data model with clicks", "Go further with Apex code", "Integrate with anything using powerful APIs", "Stay protected with enterprise-grade security", and "Customize UI with clicks or any leading-edge web framework". On the right, the form is titled "Sign up for your Salesforce Developer Edition" and "A Salesforce Platform environment for free." It includes a prompt to "Complete the form to get access to the Salesforce Developer Edition." and fields for "First Name*", "Last Name*", "Email*", "Role*" (a dropdown menu), "Company*" (with a "Company Name" sub-field), "Country/Region*" (a dropdown menu), and "Postal Code*".

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.



2. Click on Verify Account.
3. Give a password and answer a security question and click on change password.
4. Then you will redirect to your salesforce setup page.



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 Details 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 >> Customer Details
 2. Plural label name >> Customer Details
 3. Enter Record Name Label >> Customer Name
 4. Data Type >> Text
2. Click on Allow reports and Track Field History,
3. Allow search >> Save.

The screenshot shows the 'New Custom Object' setup page in Salesforce. The page is titled 'New Custom Object' and includes a search bar at the top. The main content area contains several sections for configuring the object:

- 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:
- Context-Sensitive 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.

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:
 - a. Record Name >> Appointment Name
 - b. Data Type >> Auto Number
 - c. Display Format >> app-{000}
 - d. Starting number >> 1.
2. Click on Allow reports and Track Field History,
3. Allow search >> Save.

STOP

New Custom Object

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Get the basics](#) [View all the details on this page](#)

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

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

Label

Appointment

Example: Account

Plural Label

Appointments

Example: Accounts

Starts with reserved word

☐

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

Object Name

Appointment

Example: Account

Description

Context-Sensitive Help Setting

☒ Open the standard Salesforce.com Help & Training window

☐ Open a window using a Visualforce page

Context Name

None

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

Appointment Name

Example: Account Name

Date 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

app-{000}

Example: A-0000 [What is This?](#)

Starting Number

1

Optional Features

☒ Allow Reports

☐ Allow Activities

☒ Track Field History

☐ Allow in Chatter Groups

☐ Enable Learning L

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

Create Service records 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 >> Service records
 2. Plural label name >> Service records
 3. Enter Record Name Label, and Format
 - a. Record Name >>Service records Name
 - b. Data Type >> Auto Number
 - c. Display Format >> ser-{000}
 - d. Starting number >> 1
 4. Click on Allow reports and Track Field History.
 5. Allow search >> Save.

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Get more info](#) [Get advice from Salesforce experts](#)

Custom Object Definition Edit Save Save & New Cancel

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-Generate Help Setting ☒ Open the standard Salesforce.com Help & Training window
☐ Open a window using a Visualforce page
Contact 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 What Is This?
Starting 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

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

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Get the manual](#) [Get the manual](#)

Custom Object Definition Edit Save Save & New Cancel

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

Content-Derivative 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 What is This?
Starting 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 access content and applications they frequently use without leaving the salesforce.com application.

3. Visual force Tabs

Visual force Tabs are custom tabs that display a Visual force page. Visual force 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 do not work like other custom tabs. Once created, they do not 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 do not show up in the Available Tabs list when you customize the tabs for your apps.

Creating a Custom Tab

To create a Tab:(Customer Details)

1. Go to the setup page >> type Tabs in the Quick Find bar >> click on tabs >> New (under the 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. Ensure that the Append tab to users' existing personal customizations is checked.
4. Click save.

Setup Home Object Manager

Search Setup

Q tabs

User Interface

Rename Tabs and Labels

Tabs

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

SETUP Tabs

New Custom Object Tab [Help for this Page](#)

Step 1: Enter the Details Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

New Custom Object Tab Required Information

Select an existing custom object or create a new custom object now.

Object **Service records**

Tab Style **Square**

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link **--None--**

Enter a short description.

Description

[Next](#) [Cancel](#)

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.

Setup Home Object Manager

Search Setup

Q tabs

User Interface

Rename Tabs and Labels

Tabs

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

SETUP Tabs

Custom Tabs [Help for this Page](#)

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

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

Custom Object Tabs [New](#) [What Is This?](#)

Action	Label	Tab Style	Description
Edit Del	Appointments	People	
Edit Del	Billing details and feedback	Presenter	
Edit Del	Customer Details	Call phone	
Edit Del	Service records	Form	

Web Tabs [New](#) [What Is This?](#)

No Web Tabs have been defined

Visualforce Tabs [New](#) [What Is This?](#)

No Visualforce Tabs have been defined

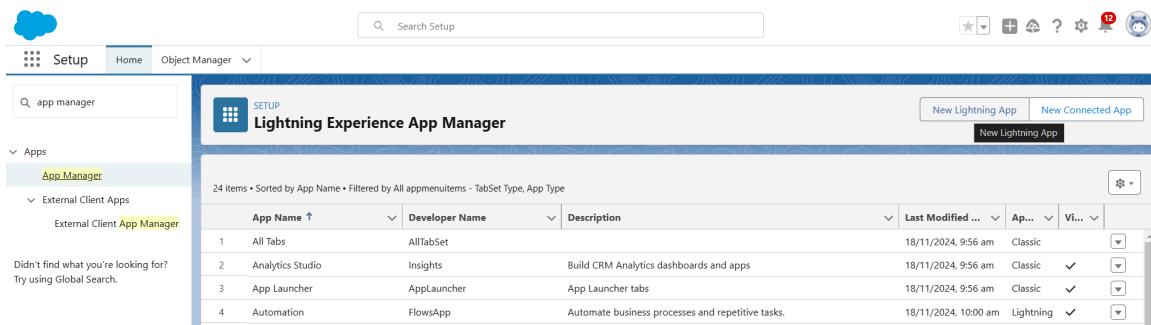
The Lightning App

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 color 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.



New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details


* App Name ¹

* Developer Name ¹


Description ¹

App Branding

Image ¹

 Upload

Primary Color Hex Value ¹

 #0070D2

Org Theme Options
☐ Use the app's image and color instead of the org's custom theme

Progress bar with 5 steps, step 1 is active.

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 them using the arrow button >> Next.

The screenshot shows the 'New Lightning App' configuration interface, specifically the 'Navigation Items' step. The title bar reads 'New Lightning App'. Below it, the section is titled 'Navigation Items'. A subtitle states: '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.'

The interface is divided into two main panels: 'Available Items' on the left and 'Selected Items' on the right. The 'Available Items' panel has a search bar containing 'das' and a 'Create' button. The 'Selected Items' panel lists the following items: Customer Details, Appointments, Service records, Billing details and feedback, Reports, and Dashboards. Arrows between the panels allow for moving items. At the bottom, there is a 'Back' button, a progress bar with four steps (the second step is active), and a 'Next' button.

5. To Add User Profiles: Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.

The screenshot shows the 'New Lightning App' configuration interface, specifically the 'User Profiles' step. The title bar reads 'New Lightning App'. Below it, the section is titled 'User Profiles'. A subtitle states: 'Choose the user profiles that can access this app.'

The interface is divided into two main panels: 'Available Profiles' on the left and 'Selected Profiles' on the right. The 'Available Profiles' panel has a search bar containing 'syst' and lists 'Salesforce API Only System Integrations'. The 'Selected Profiles' panel lists 'System Administrator'. Arrows between the panels allow for moving items. At the bottom, there is a 'Back' button, a progress bar with four steps (the third step is active), and a 'Save & Finish' button.

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:
 - i. Field Label: Phone number
 - ii. Field Name : gets auto generated
 - iii. 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 an "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.

SETUP > OBJECT MANAGER

Customer Details

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

Step 2. Enter the details

Field Label:

Field Name:

Description:

Help Text:

Required: ☐ Always require a value in this field in order to save a record

Unique: ☐ Do not allow duplicate values

External ID: ☐ Set this field as the unique record identifier from an external system

Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity

Default Value:

Use formula syntax: Enclose text and picklist value API names in double quotes ("New text"), include numbers without quotes (25), show percentages as decimals (0.10), and express date calculations in the standard format: (Today) + 7. To reference a field from a Custom Metadata type record use: \$CustomMetadata.Type__c.PicklistField__c

Previous Next Cancel

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: Ensure you complete Activity four Before continuing.

SETUP > OBJECT MANAGER

Appointment

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

Quick Find

New Deleted Fields Field Dependencies

Items, Sorted by Field Label

Custom Field

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Appointment Name	Name	Auto Number	
Created By	CreatedById	Lookup(User)	
Last Modified By	LastModifiedById	Lookup(User)	
Owner	OwnerId	Lookup(User,Group)	

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.

SETUP > OBJECT MANAGER

Service records

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

Lookup Filter

Optionally, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

▼ Hide Filter Settings

Filter Criteria [Insert Suggested Criteria](#)

Field	Operator	Value / Field
Appointment: Appointment Date	less than	Field Appointment: Created Date
AND [Begin typing to search for a field...]	--None--	Value

[Add Filter Logic...](#)

Filter Type

☒ **Required.** The user-entered value must match filter criteria.
If it doesn't, display this error message on save:
Value does not exist or does not match filter criteria.
[Reset to default message](#)

☐ **Optional.** The user can remove the filter or enter values that don't match criteria.

Lookup Window Text

Add this informational message to the lookup window.

Active ☒ Enable this filter.

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 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 " 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 the 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 filled
6. Default value : unchecked
7. Click on next >> next >> save.

The screenshot displays the Salesforce Setup interface for the 'Appointment' object. The left sidebar shows a navigation menu with 'Fields & Relationships' selected. The main content area is titled 'Step 2. Enter the details' and 'Step 2 of 4'. It contains the following fields and options:

- Field Label:** Maintenance service
- Default Value:** Unchecked (selected)
- Field Name:** Maintenance_service
- Description:** (empty text box)
- Help Text:** (empty text box)
- Auto add to custom report type:** ☒ Add this field to existing custom report types that contain this entity

Creation of Another Checkbox Field on Appointment Object :

1. Repeat the steps from one to 3.
2. Give the Field Label : Repairs
3. Field Name : is auto populate.
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 Name : is auto filled
9. Default value : unchecked

10. Click on next >> next >> save.

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 Name : is auto filled.
6. Default value : unchecked.
7. Click on next >> next >> save.

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 Name : is auto filled
6. Make it as a Required field by click on the Required option.
7. Click on next >> next >> save.

The screenshot shows the Salesforce Setup interface for creating a new custom field for the Appointment object. The breadcrumb trail is: SETUP > OBJECT MANAGER > Appointment > Fields & Relationships > New Custom Field. The left sidebar shows the navigation menu with 'Fields & Relationships' selected. The main content area is titled 'Appointment New Custom Field' and shows 'Step 4 of 4: Add to page layouts'. A table lists the field details: Field Label (Appointment Date), Data Type (Date), Field Name (Appointment_Date), and Description. Below the table, there is a section for selecting page layouts to include the field. A table shows 'Appointment Layout' selected with a checkmark. At the bottom, there are buttons for 'Previous', 'Save & New', 'Save', and 'Cancel'.

Field Label	Appointment Date
Data Type	Date
Field Name	Appointment_Date
Description	

Select the page layouts that should include this field. The field will be added as the last field in the first 2-column section of these page layouts. The field will not appear on any pages if you do not select a layout.

To change the location of this field on the page, you will need to customize the page layout.

Add Field	Page Layout Name
<input checked="" type="checkbox"/>	Appointment Layout

When finished, click Save & New to create more custom fields, or click Save if you are done.

Creation of Currency Fields

Creation of Currency 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 "Currency" as data type and click Next.
4. Give the Field Label : Service Amount
5. Field Name : is auto filled
6. Click on next
7. Give read only for all the profiles in field level security for profile.
8. Click on next > > save.

The screenshot shows the 'New Custom Field' wizard for the 'Appointment' object, specifically 'Step 4. Add to page layouts'. The field details are: Field Label 'Service Amount', Data Type 'Currency', Field Name 'Service_Amount', and Description is empty. Below this, there is a section to select page layouts. The 'Add Field' checkbox is checked, and 'Appointment Layout' is selected in the 'Page Layout Name' dropdown. Navigation buttons at the bottom include 'Previous', 'Save & New', 'Save', and 'Cancel'.

Creation of Currency Field on Billing details and feedback Object :

1. Follow the same steps as mentioned above in Billing details and feedback Object.
2. Change the label name as mentioned.
3. Give the Field Label : Payment Paid
4. Field Name : is auto filled

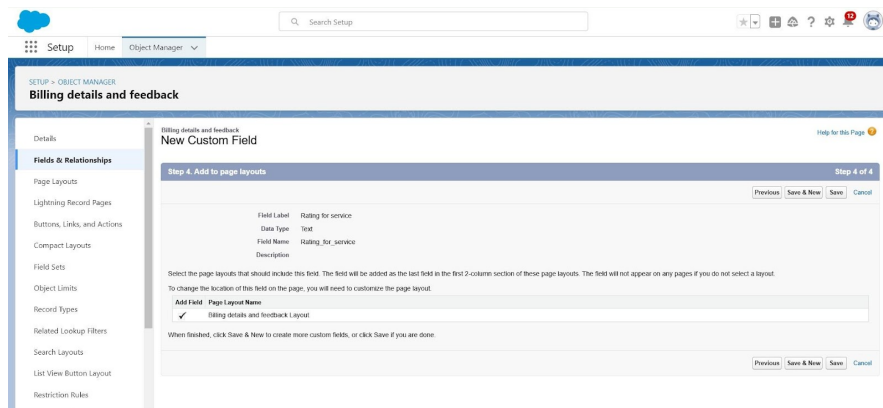
The screenshot shows the 'New Custom Field' wizard for the 'Billing details and feedback' object, specifically 'Step 4. Add to page layouts'. The field details are: Field Label 'Payment Paid', Data Type 'Currency', Field Name 'Payment_Paid', and Description is empty. Below this, there is a section to select page layouts. The 'Add Field' checkbox is checked, and 'Billing details and feedback Layout' is selected in the 'Page Layout Name' dropdown. Navigation buttons at the bottom include 'Previous', 'Save & New', 'Save', and 'Cancel'.

Creation of Text Fields

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 "Text" as data type and click Next.
4. Give the Field Label : Vehicle number plate
5. Field Name : is auto filled
6. Length : 10
7. Make field as Required and Unique.
8. 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 filled
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 apart by a new line" and enter values as shown below.
5. The values are: Started, Completed.
6. Click Next.
7. Next >> Next >> Save.

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label

Values

☐ Use global picklist value set

☒ Enter values, with each value separated by a new line

☐ Display values alphabetically, not in the order entered

☐ Use first value as default value [i](#)

☒ Restrict picklist to the values defined in the value set [i](#)

Field Name

Description

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 apart by a new line" and enter values as shown below.
5. The values are: Pending, Completed.
6. Click Next >> Next >> Save.

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label

Values

☐ Use global picklist value set

☒ Enter values, with each value separated by a new line

Pending
Completed

☐ Display values alphabetically, not in the order entered

☐ Use first value as default value

☒ Restrict picklist to the values defined in the value set

Field Name

Description

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.

Step 2. Choose output type Step 2 of 5

Previous Next Cancel

Field Label

Field Name

Auto add to custom report type ☒ Add this field to existing custom report types that contain this entity

Formula Return Type

☐ None Selected Select one of the data types below.

☐ Checkbox Calculate a boolean value
Example: `TODAY() > CloseDate`

☐ Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `Gross Margin = Amount - Cost_c`

☒ Date Calculate a date, for example, by adding or subtracting days to other dates.
Example: `Reminder Date = CloseDate - 7`

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 standard 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 the object manager >> From the drop-down menu, 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 :
`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.

The screenshot shows the 'Validation Rule Edit' window. At the top, there are buttons for 'Save', 'Save & New', and 'Cancel'. The 'Rule Name' field contains 'Vehicle'. The 'Active' checkbox is checked. The 'Description' field is empty. On the right, a 'Quick Tips' box lists 'Operators & Functions'. Below this, the 'Error Condition Formula' section shows an example: 'Discount_Percent__c>0.30' with a link to 'More Examples...'. It explains that if the formula is true, an error message is displayed. Below the explanation are 'Insert Field' and 'Insert Operator' buttons. The formula field contains the code: `NOT(REGEX(Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))`. On the right side, a 'Functions' list is visible, showing 'ABS', 'ACOS', 'ADDMO', 'AND', 'ASCII', 'ASIN', and 'ABS(numt)'. There is also an 'Insert Sel' button.

To create a validation rule to an Service records Object

1. Go to the setup page >> click on the object manager >> From the 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 :-

NOT(ISPICKVAL(Service_Status_c , "Completed"))

5. 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.

The screenshot shows the 'Validation Rule Edit' window. At the top, there are buttons for 'Save', 'Save & New', and 'Cancel'. The 'Rule Name' field contains 'service_status_note'. The 'Active' checkbox is checked. The 'Description' field is empty. Below this is the 'Error Condition Formula' section. It includes an example: 'Discount_Percent_c > 0.30' with a link 'More Examples...'. Below the example, it says 'Display an error if Discount is more than 30%' and 'If this formula expression is true, display the text defined in the Error Message area'. There are buttons for 'Insert Field' and 'Insert Operator'. The formula field contains 'NOT(ISPICKVAL(Service_Status_c , "Completed"))'. To the right, there is a 'Functions' list with a dropdown menu set to '-- All Function Categories --'. The list includes ABS, ACOS, ADDMONTHS, AND, ASCII, and ASIN. Below the list is a button 'Insert Selected Function' and a description for ABS: 'ABS(number) Returns the absolute value of a number, a number without its sign'.

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

1. Go to the setup page >> click on the object manager >> From the drop-down menu, 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}"))
5. 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.


The screenshot shows the 'Validation Rule Edit' window. At the top, there are buttons for 'Save', 'Save & New', and 'Cancel'. The 'Rule Name' field contains 'rating_should_be_less_than_5'. The 'Active' checkbox is checked. The 'Description' field is empty. Below this is the 'Error Condition Formula' section. It includes an example: 'Discount_Percent_c > 0.30' with a link 'More Examples...'. Below the example, it says 'Display an error if Discount is more than 30%' and 'If this formula expression is true, display the text defined in the Error Message area'. There are buttons for 'Insert Field' and 'Insert Operator'. The formula field contains 'NOT(REGEX(Rating_for_service_c , "[1-5]{1}"))'. To the right, there is a 'Quick Tips' section with a link to 'Operators'. A red exclamation mark icon is next to the text 'Required Information'.

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 the 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 filled
6. Define the matching standard as
7.

Field	Matching Method
1. Gmail	Exact
2. Phone Number	Exact
8. Click save.
9. After Saving, Click on Activate.

 **SETUP**
Matching Rules

Matching Rule [Help for this Page ?](#)

Matching customer details

Matching Rule Detail Edit Delete Clone Activate

Object	Customer Details	Activate
Rule Name	Matching customer details	
Unique Name	Matching_customer_details	
Description		
Matching Criteria	(Customer Details: Gmail EXACT MatchBlank = FALSE) AND (Customer Details: Phone_number EXACT MatchBlank = FALSE)	
Status	Inactive	
Created By	Mohammed Fasi Shaik, 19/11/2024, 10:42 pm	Modified By Mohammed Fasi Shaik, 19/11/2024, 10:42 pm

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 rule >> click on New Rule >> select customer details object.
3. Give the Rule name as : Customer Detail duplicate
4. Scroll a little in the Matching rule section
5. Select the matching rule : Matching customer details
6. Also, Click on save.
7. After saving the Duplicate Rule, Click on Activate.

Data

▼ Duplicate Management

Duplicate Rules

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

Customer Details Duplicate Rule

Customer Detail duplicate

Help for this Page ?

Duplicate Rule Detail

EditDeleteCloneActivate

Rule Name	Customer Detail duplicate	Order	1 of 1 [Reorder]	Activate
Description				
Object	Customer Details			
Record-Level Security	Enforce sharing rules			
Action On Create	Allow	Operations On Create	<input checked="" type="checkbox"/> Alert <input checked="" type="checkbox"/> Report	
Action On Edit	Allow	Operations On Edit	<input type="checkbox"/> Alert <input type="checkbox"/> Report	
Alert Text	Use one of these records?			
Active	<input type="checkbox"/>			
Matching Rule	<input checked="" type="checkbox"/> Matching customer details <input checked="" type="checkbox"/> Mapped	Matching Criteria	(Customer Details: Gmail EXACT MatchBlank = FALSE) AND (Customer Details: Phone_number EXACT MatchBlank = FALSE)	
Conditions				

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, Visual force 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 Platform 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 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 displays the 'Session Settings' and 'Password Policies' sections of a Salesforce profile configuration page. The 'Session Settings' section includes 'Session Times Out After' set to '8 hours of inactivity' and 'Session Security Level Required at Login' set to '--None--'. The 'Password Policies' section includes 'User passwords expire in' set to 'Never expires', 'Enforce password history' set to '3 passwords remembered', 'Minimum password length' set to '8', 'Password complexity requirement' set to 'Must include alpha and numeric characters', 'Password question requirement' set to 'Cannot contain password', 'Maximum invalid login attempts' set to '10', and 'Lockout' set to '15 minutes'.

Session Settings	
Session Times Out After	8 hours of inactivity
Session Security Level Required at Login	--None--

Password Policies	
User passwords expire in	Never expires
Enforce password history	3 passwords remembered
Minimum password length	8
Password complexity requirement	Must include alpha and numeric characters
Password question requirement	Cannot contain password
Maximum invalid login attempts	10
Lockout	15 minutes

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 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. Also, click save.

Users

Profiles

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

SETUP

Profiles

Clone Profile [Help for this Page](#)

Enter the name of the new profile.

You must select an existing profile to clone from. *= Required Information

Existing Profile	Standard Platform User
User License	Salesforce Platform
Profile Name	<input type="text" value="sales person"/>

Save

Cancel

Save

Role & Role Hierarchy

A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

Creating Manager Role

1. Go to quick find >> Search for Roles >> click on set up roles.
2. Click on Expand All and click on add role under whom this role works.
3. Give Label as "Manager" and Role name gets auto filled. Then click on Save.

role

Users

Roles

Feature Settings

Sales

Contact Roles on Contracts

Contact Roles on Opportunities

Service

Case Teams

Case Team Roles

Contact Roles on Cases

Didn't find what you're looking for?

Try using Global Search.

SETUP

Roles

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

Your Organization's Role Hierarchy

Show in tree view

Collapse All Expand All

PVPSIT

Add Role

CEO Edit Del Assign

Add Role

CFO Edit Del Assign

Add Role

COO Edit Del Assign

Add Role

Manager Edit Del Assign

Add Role

SVP, Customer Service & Support Edit Del Assign

Add Role

Customer Support, International Edit Del Assign

Add Role

Customer Support, North America Edit Del Assign

Creating another roles

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

Quick Find: role

Users

Roles

Feature Settings

Sales

Service

Case Teams

Contact Roles on Contracts

Contact Roles on Opportunities

Case Team Roles

Contact Roles on Cases

SETUP Roles

Role Edit

Help for this Page

New Role

Role Edit

Label: sales person

Role Name: sales_person

This role reports to: Manager

Role Name as displayed on reports:

Save Save & New Cancel

Save

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
 - a. First Name : Niklaus
 - b. Last Name : Mikaelson
 - c. Alias : Give an Alias Name
 - d. Email id : Give your Personal Email id
 - e. Username : Username should be in this form: text@text.text
 - f. Nick Name : Give a Nickname
 - g. Role : Manager
 - h. User license : Salesforce
 - i. Profiles : Manager
3. Save.

SETUP Users

General Information ⓘ Required Information

First Name	Niklaus	Role	Manager ⓘ
Last Name	Mikaelson	User License	Salesforce ⓘ
Alias	nmika	Profile	Manager ⓘ
Email	21501a05g0@pvpsit.ac.in	Active	<input checked="" type="checkbox"/>
Username	mik@nikky ⓘ	Marketing User	<input type="checkbox"/>
Nickname	nik ⓘ	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>
		Site.com Publisher User	<input type="checkbox"/>
		WDC User	<input type="checkbox"/>
		Data.com User Type	--None-- ⓘ
		Data.com Monthly Addition Limit	Default Limit (300) ⓘ
		Accessibility Mode (Classic Only)	<input type="checkbox"/> ⓘ

creating another users

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

Note : create at least three users with these permissions.

User 1 : New User

User Edit

Save

Save & New

Cancel

General Information

First Name

Courtney

Last Name

Brown

Alias

brow

Email

21501a05g0@pvpsit.ac.in

Username

court@brownie.com

Nickname

courty

Title

Company

Department

Division

Role

sales person

User License

Salesforce Platform

Profile

sales person

Active

☒

Marketing User

☐

Offline User

☐

Knowledge User

☐

Flow User

☐

Service Cloud User

☐

Site.com Contributor User

☐

Site.com Publisher User

☐

WDC User

☐

Data.com User Type

--None--

User 2 : New User

User Edit

Save

Save & New

Cancel

General Information

First Name

Kali

Last Name

Porter

Alias

kport

Email

21501a05g0@pvpsit.ac.in

Username

kali@porters.com

Nickname

kal

Title

Company

Department

Division

Role

sales person

User License

Salesforce Platform

Profile

sales person

Active

☒

Marketing User

☐

Offline User

☐

Knowledge User

☐

Flow User

☐

Service Cloud User

☐

Site.com Contributor User

☐

Site.com Publisher User

☐

WDC User

☐

User 3: New User

User Edit

Save

Save & New

Cancel

General Information

First Name

Lia

Last Name

Felix

Alias

lfeli

Email

21501a05g0@pvpsit.ac.in

Username

lia@flex.com

Nickname

joao

Title

Company

Department

Division

Role

sales person

User License

Salesforce Platform

Profile

sales person

Active

☒

Marketing User

☐

Offline User

☐

Knowledge User

☐

Flow User

☐

Service Cloud User

☐

Site.com Contributor User

☐

Site.com Publisher User

☐

WDC User

☐

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 suitable 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 auto filled.
4. Search for Roles.
5. In Available Members, select Sales person and click on add; it will be moved to the selected member.
6. Click on save.

Group Membership

New Group

The screenshot shows the 'New Public Group' configuration page. At the top, there's a 'Group Information' header with 'Save' and 'Cancel' buttons. Below this, the 'New Public Group' section contains several fields: 'Label' with the value 'sales team', 'Group Name' with the value 'sales_team', 'Grant Access Using Hierarchies' checked, and an empty 'Description' field. A search bar is present with 'Roles' selected in the dropdown and a 'Find' button. Below the search bar, there are two columns: 'Available Members' and 'Selected Members'. The 'Available Members' column lists various roles, including 'Role: Customer Support, North America', 'Role: Director, Channel Sales', 'Role: Director, Direct Sales', 'Role: Eastern Sales Team', 'Role: Installation & Repair Services', 'Role: Manager', 'Role: Marketing Team', 'Role: SVP, Customer Service & Support', 'Role: SVP, Human Resources', 'Role: SVP, Sales & Marketing', 'Role: VP, International Sales', 'Role: VP, Marketing', and 'Role: VP, North American Sales'. The 'Selected Members' column currently contains 'Role: sales person'. Between these columns are 'Add' and 'Remove' buttons.

Group Information	
New Public Group	
Label	sales team
Group Name	sales_team
Grant Access Using Hierarchies	<input checked="" type="checkbox"/>
Description	
Search: Roles	for: Find
Available Members	Selected Members
Role: Customer Support, North America	Role: sales person
Role: Director, Channel Sales	
Role: Director, Direct Sales	
Role: Eastern Sales Team	
Role: Installation & Repair Services	
Role: Manager	
Role: Marketing Team	
Role: SVP, Customer Service & Support	
Role: SVP, Human Resources	
Role: SVP, Sales & Marketing	
Role: VP, International Sales	
Role: VP, Marketing	
Role: VP, North American Sales	

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 surety and privacy. Salesforce provides a mixture 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 combining 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 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 filled.
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.

🔍 sharing

▼ Security

Guest User **Sharing** Rule Access Report

Sharing Settings

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



SETUP

Sharing Settings

Sharing Settings

[Help for this Page](#) ?

This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to [Background Jobs](#) to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.

Manage sharing settings for: All Objects

[Disable External Sharing Model](#)

Default Sharing Settings

Organization-Wide Defaults

[Edit](#)

[Organization-Wide Defaults Help](#) ?

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public Read/Write/Transfer	Private	✓
Account and Contract	Public Read/Write	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓

Step 1: Rule Name

Label

Rule Name

Description

Step 2: Select your rule type

Rule Type

☒ Based on record owner ☐ Based on criteria

Step 3: Select which records to be shared

Service records: owned by members of

Step 4: Select the users to share with

Share with

Step 5: Select the level of access for the users

Access Level

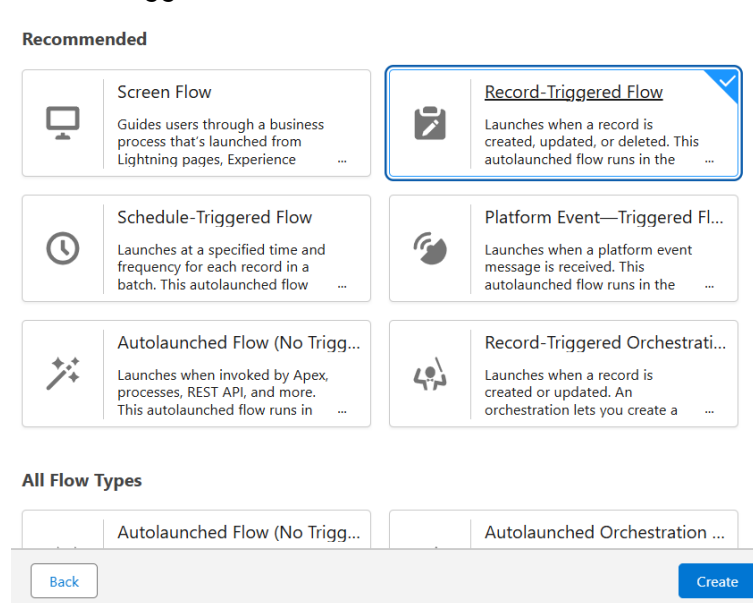
[Save](#)

[Cancel](#)

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 the "+" Symbol, and In the Drop-down List, select the "Update records Element". Give the Label Name : Amount Update
7. Api name : is auto filled.
8. Set a filter condition : All Conditions are met(AND)
9. Field : Payment_Status_c
10. Operator : Equals
11. Value : Completed
12. Also, 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 to Rich Text? View to Plain Text.
20. In body field paste the syntax that given below.

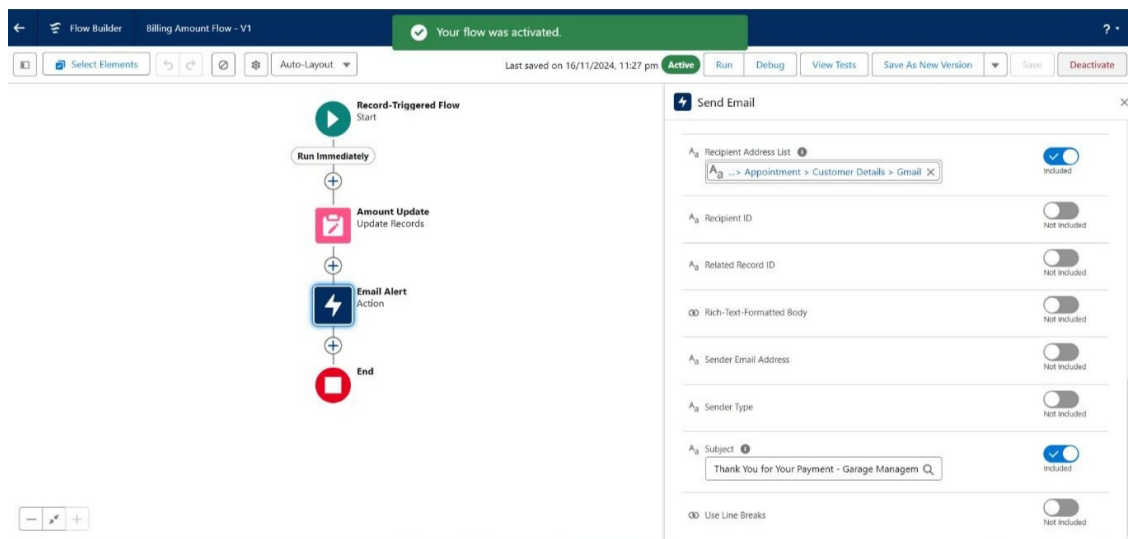
Dear {!\$Record.Service_records_r.Appointment_r.Customer_Details_r.Name},

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 satisfying, 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 filled.
28. Enable the body to 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_Details_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. The Flow Api name will be auto-filled.
35. Also, 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 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, the before trigger validates the record first and then saves it. Some standard 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 dispersion 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 a New apex class.
4. Name the class as "AmountDistributionHandler".

```
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            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 the developer console, and you will be navigated to a new console window.
3. Click on the File menu in the toolbar, 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)

```

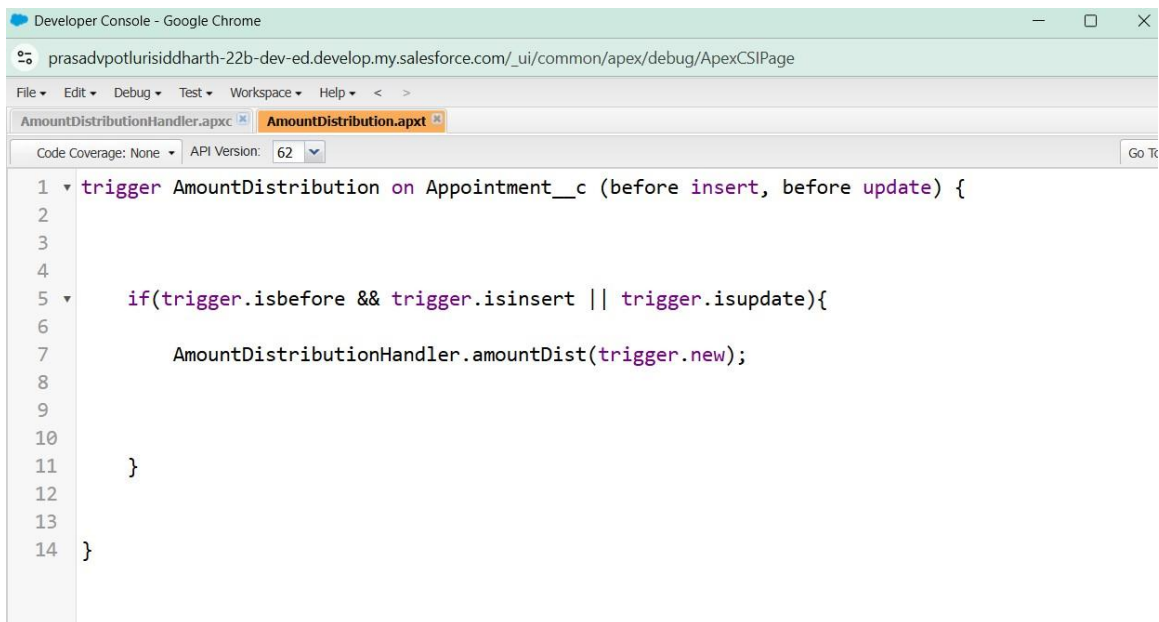
{
}

```

In this project , trigger is called whenever the especial records sum exceed the threshold i.e minimum business requisite 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 interface. The browser tab is titled "Developer Console - Google Chrome". The address bar shows the URL "prasadvpotlurisiddharth-22b-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage". The console has a menu bar with "File", "Edit", "Debug", "Test", "Workspace", and "Help". Below the menu bar, there are two tabs: "AmountDistributionHandler.apxc" and "AmountDistribution.apxt", with the latter being the active tab. The console displays the following Apex code for the "AmountDistribution.apxt" trigger:

```
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

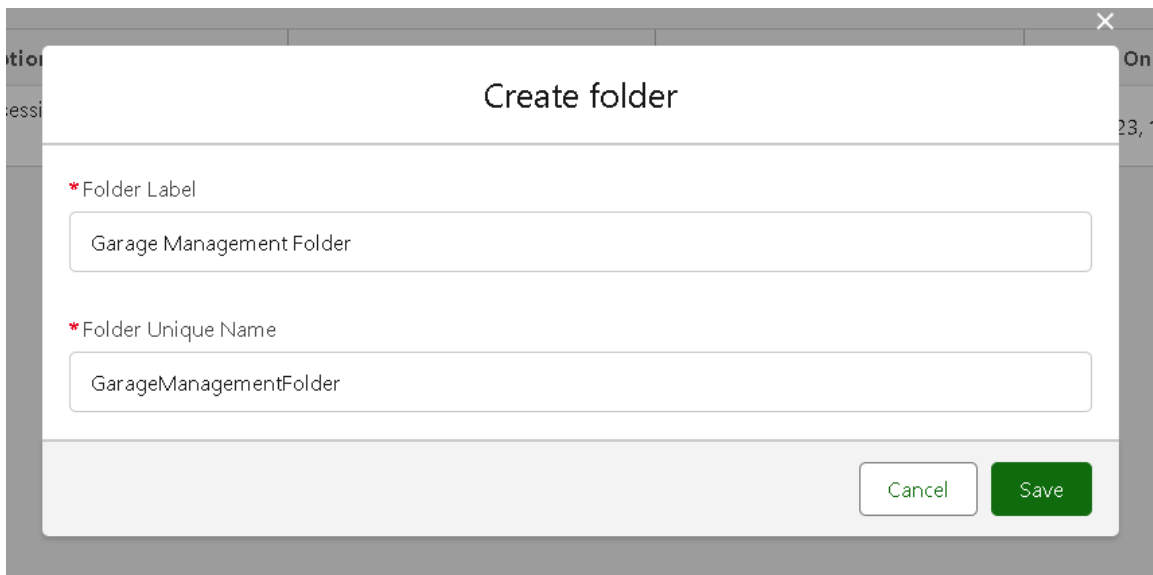
Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combining, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

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 a new folder.
3. Give the Folder label as “Garage Management Folder”, Folder unique name will be auto filled.
4. Click save.



tion On

23, 1

Create folder

* Folder Label

Garage Management Folder

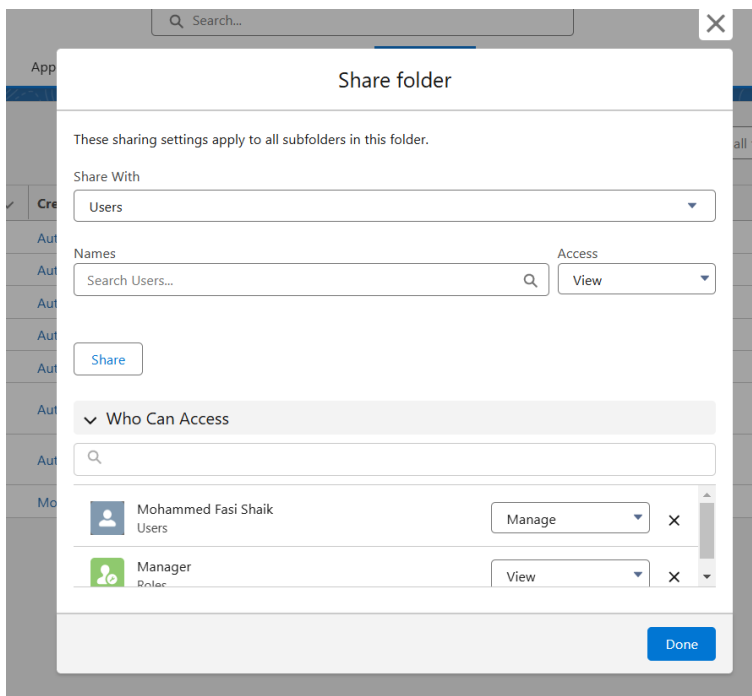
* Folder Unique Name

GarageManagementFolder

Cancel 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 menu arrow for the 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 Report Type in quick find box and click on it >> click on Continue.
2. Click on a 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 auto filled.

6. Keep the Description as the same.
7. Select Store in Category as " other Reports "
8. Select the deployment status as " Deployed ", click on Next.

Report Types

Step 1. Define the Custom Report Type

Report Type Focus

Specify what type of records (rows) will be the focus of reports generated by this report type.
Example: If reporting on "Contacts with Opportunities with Partners," select "Contacts" as the primary object.

Primary Object: Customer Details

Identification

Report Type Label: Service information

Report Type Name: Service_information

Description:

Note: Description will be visible to users who create reports.

Store in Category: Other Reports

Deployment

A report type with deployed status is available for use in the report wizard. While in development, report types are visible only to authorized administrators and their delegates.

Deployment Status: ☐ In Development ☒ Deployed

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. Also, select the related object as "service records".
13. Repeat the process and select the related object as " Billing details and feedback".
14. Also, click on save.

Report Types

This report type will generate reports about Customer Details. You may define which related records from other objects are returned in report results by choosing a relationship to another object.

A Customer Details
Primary Object

B Appointments
A to B Relationship:
Each "A" record must have at least one related "B" record.
Each "A" record may or may not have related "B" records.

C Service records
B to C Relationship:
Each "B" record must have at least one related "C" record.
Each "B" record may or may not have related "C" records.

D Billing details and feedback
Select Object:
Billing details and feedback
Duplicate Record Items
at one related "D" record.
related "D" records.

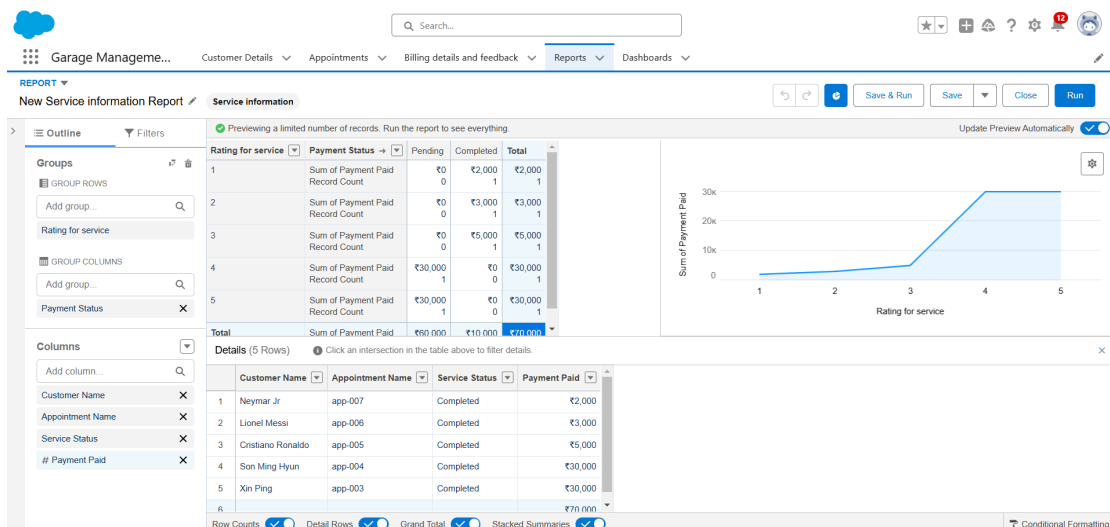
Object Limit Reached
You can associate up to four objects to a custom report type.

Previous Save Cancel

Create Report

Note : Before creating report, create latest "10" records in every object. Try to fill every field in each record.

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.
 - Customer name.
 - Appointment Date.
 - Service Status.
 - Payment paid.
5. Remove other 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.
 2. 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 filled.
11. Select the folder the created and Click on save.

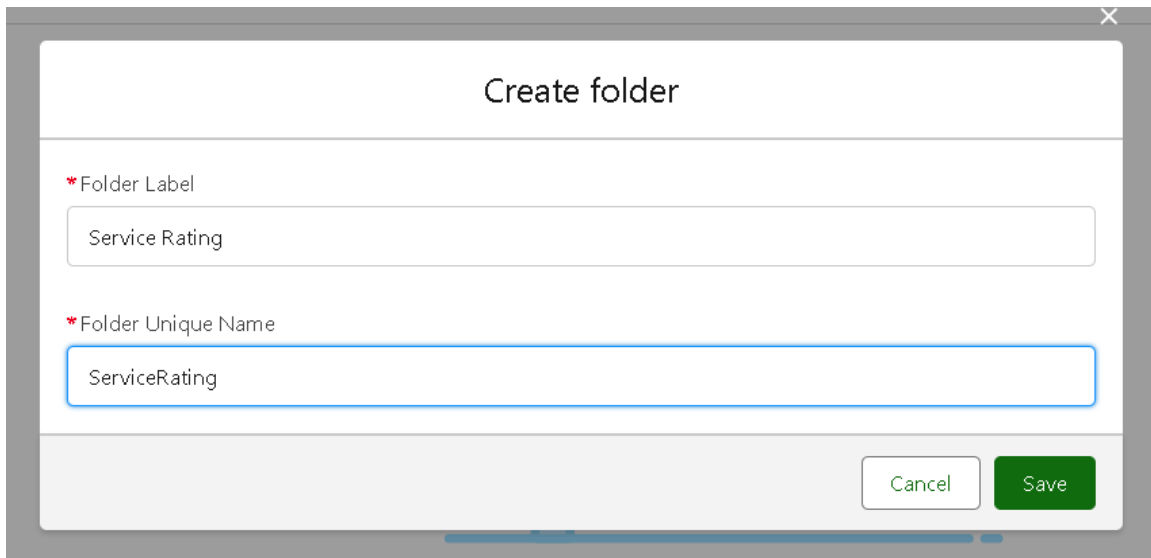


Dashboards

Dashboards help you understand changing business conditions so you can make decisions based on the real-time data you have gathered with reports. Use dashboards to help users discover trends, resolve quantities, and measure the impact of their action. 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 the dashboard tab.
3. Click a new folder, give the folder label as “ Service Rating dashboard”.
4. Folder unique name will be auto filled.
5. Click save.



Create folder

*Folder Label

Service Rating

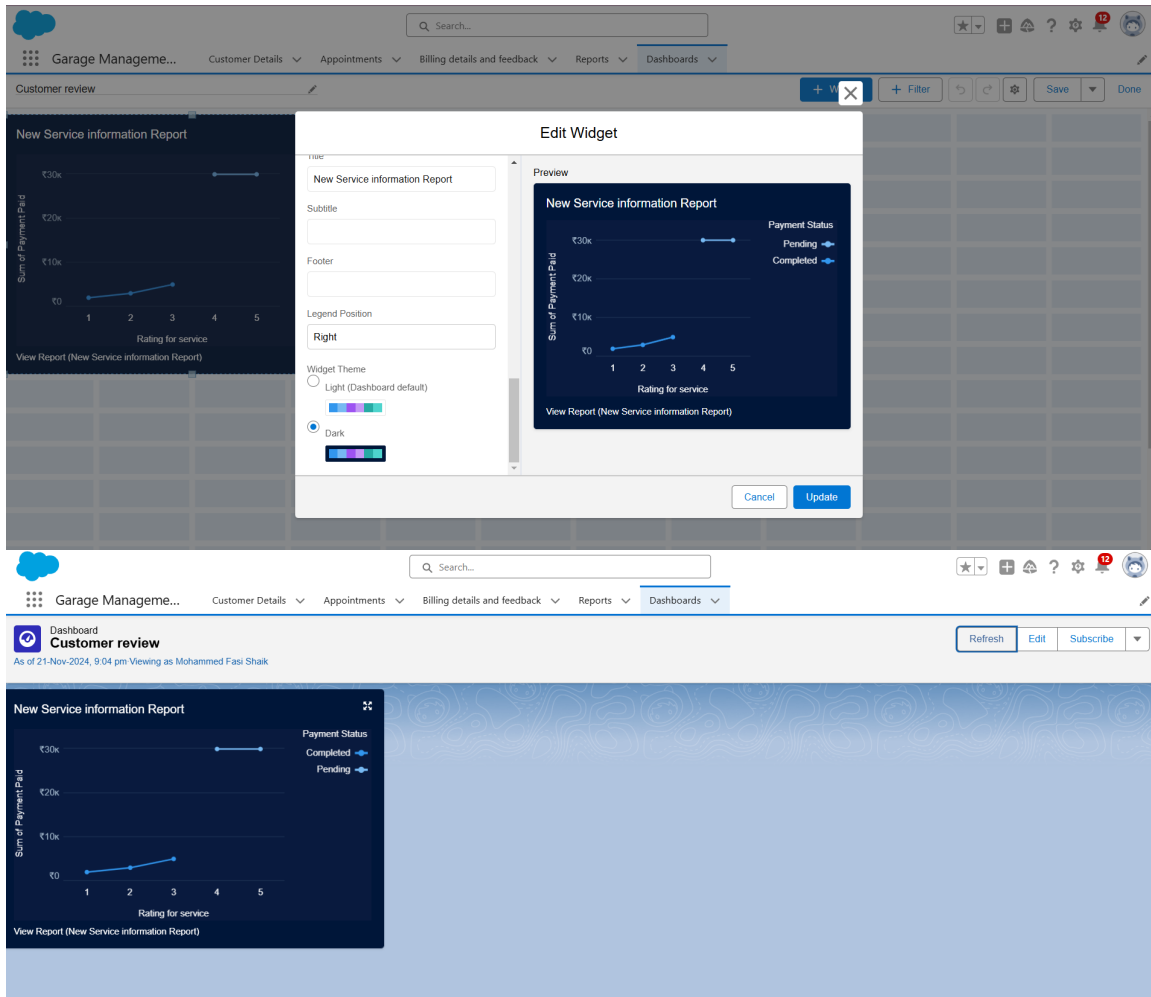
*Folder Unique Name

ServiceRating

Cancel Save

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.



Subscription:

1. After that, Click on Subscribe on the top right.
2. Set the Frequency as "weekly".
3. Set a day as Monday.
4. Also, 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

Recipients see the same report data as the person running the report.

☒ Receive new results by email when dashboard is refreshed.

Send email to: Me

Edit Recipients

Unsubscribe Cancel Save