

GARAGE MANAGEMENT SYSTEM

BY,

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Garage Management system

Project Description:

The Garage Management System is a valuable tool for automotive repair facilities, helping them deliver top-notch service, increase operational efficiency, and build lasting customer relationships. With its user-friendly interface and powerful features, GMS empowers garages to thrive in a competitive market while ensuring a seamless and satisfying experience for both customers and staff.

Project Flow:

In this project you can do hands on practice the configuration as well as customization with the Data modelling, App building, User Adoption & Apex Code

Milestone 1: Creation of developer account
Milestone 2: Object Creation
Milestone 3 : Tabs Creation
Milestone 4 : Create App
Milestone 5 : Fields & Relationships
Milestone 6 : Page Layout
Milestone 7 : Profile
Milestone 8 : Role and role hierarchy
Milestone 9 : Users
Milestone 10 : Permission set
Milestone 11 : User Adoption
Milestone 12 : Reports
Milestone 13 : Dashboards
Milestone 14 : Flows
Milestone 15 : Apex Classes and Triggers

What you'll learn

1. Real Time Salesforce Project
2. Object & Relationship in Salesforce
3. Formula fields and Validation rules.
4. Cross object formula fields.
5. Rollup summary fields.
6. Reports and dashboards
7. Conditional formatting.
8. Flows

9. Email alerts and email templates

Milestone 1-Salesforce :

Introduction:

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

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

What Is Salesforce?

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

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

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

<https://youtu.be/r9EX3lGde5k>

Activity 1: Creating Developer Account:

Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :

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

- 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
- Customize UI with clicks or any leading-edge web framework

Sign up for your Salesforce Developer Edition
A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name*
Your first name

Last Name*
Your last name

Email*
Your email address

Role*
Your job role

Company*
Company Name

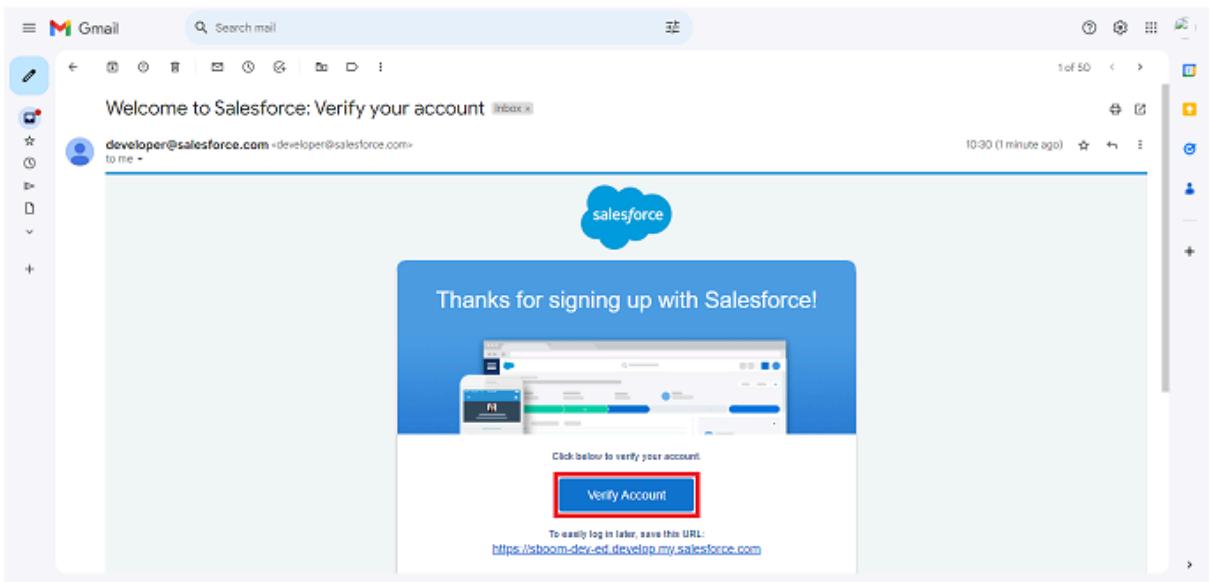
- 1) First name & Last name
- 2) Email
- 3) Role : Developer
- 4) Company : College Name
- 5) County : India
- 6) Postal Code : pin code
- 7) Username : should be a combination of your name and company

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

Click on sign me up after filling these.

Activity 2: Account Activation:

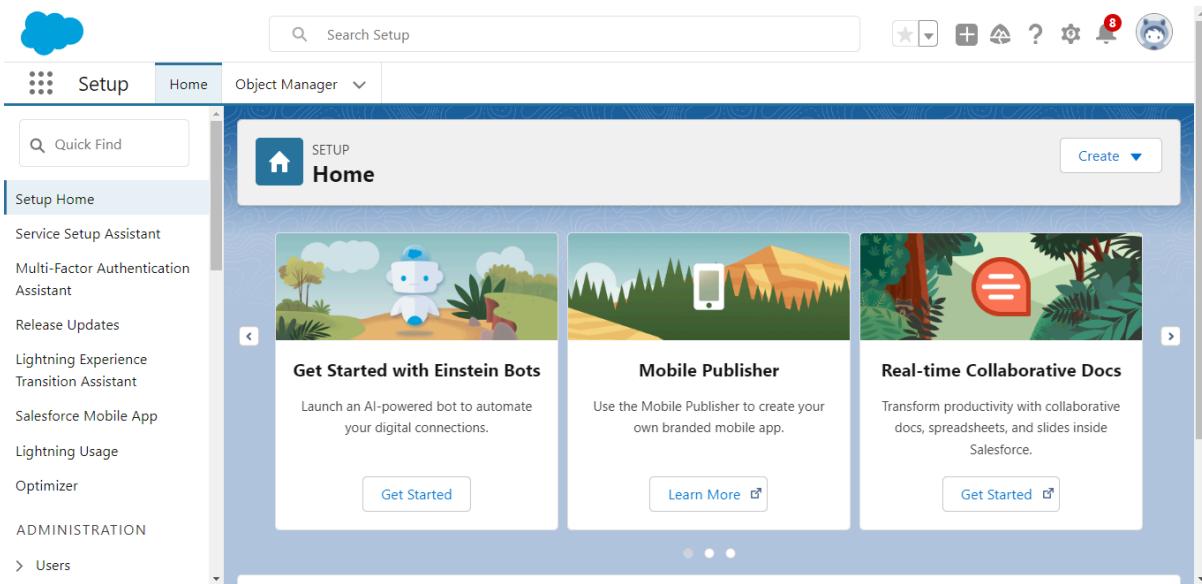
1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



2. Click on Verify Account
3. Give a password and answer a security question and click on change password.

The screenshot shows the "Change Your Password" page. The title is "Change Your Password". A message at the top says "Enter a new password for lead@sb.oom." and "Make sure to include at least:" followed by three requirements: "8 characters", "1 letter", and "1 number". Below these requirements is a red-bordered box containing the password fields and the "Change Password" button. The "New Password" field contains "....." and is labeled "Good". The "Confirm New Password" field contains "....." and is labeled "Match". Below these fields is a "Security Question" section with a dropdown menu showing "In what city were you born?". Underneath is an "Answer" field containing "asdfghjkl". The bottom right button is "Change Password", which is also highlighted with a red border.

4. Then you will redirect to your salesforce setup page.



Milestone 2- Object

What Is an Object?

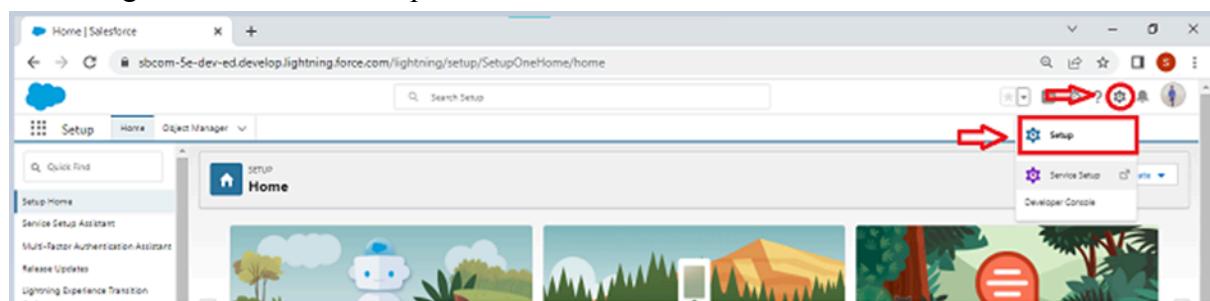
Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

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.

To Navigate to Setup page:

Click on gear icon → click setup.



To create an object:

- From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.



- On Custom object defining page:
- Enter the label name, plural label name, click on Allow reports, Allow search.

New Custom Object

Custom Object Definition Edit

Custom Object Information

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

Label	Example: Account
Plural Label	Example: Accounts

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

Object Name	Example: acc
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Description

Contact Sensitive Help Setting

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 Text

Optional Features

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

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

Buttons

Save Save & New Cancel

- Click on Save.

Activity 1: 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 and Format
 - Record Name → Customer Name
 - Data Type → Text
2. Click on Allow reports and Track Field History,
3. Allow search → **Save.**

Activity 2: Create Appointment Object:

To create an object:

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

Activity 3: Create Service records Object:

To create an object:

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

Activity 4: Create Billing details and feedback Object:

To create an object:

7. From the setup page → Click on Object Manager → Click on Create → Click on Custom Object.
 - 7) Enter the label name → Billing details and feedback

- 8) Plural label name → Billing details and feedback
- 9) Enter Record Name Label and Format
 - Record Name → Billing details and feedback Name
 - Data Type → Auto Number
 - Display Format → bill-{000}
 - Starting number → 1
8. Click on Allow reports and Track Field History,
9. Allow search → **Save.**

Milestone 3- Tabs

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

Types of Tabs:

1. Custom Tabs

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

2. Web Tabs

Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window. Web tabs make it easier for your users to quickly access content and applications they frequently use without leaving the salesforce.com application.

3. Visualforce Tabs

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

4. Lightning Component Tabs

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

5. Lightning Page Tabs

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

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

Activity 1: Creating a Custom Tab

To create a Tab:(Customer Details)

1. Go to setup page → type Tabs in Quick Find bar → click on tabs → New (under custom object tab)

The screenshot shows the Salesforce Setup interface with the 'Custom Tabs' page open. The 'Custom Object Tabs' section lists various custom objects, each with a 'Tab Style' (e.g., Deck, Appbar, Chess piece, Jewel) and a brief description. A red box highlights the 'Customer Details' object, and a red arrow points to the 'Create New' button at the top right of the list.

2. Select Object(Customer Details) → Select the tab style → Next (Add to profiles page) keep it as default → Next (Add to Custom App) uncheck the include tab .
3. Make sure that the Append tab to users' existing personal customizations is checked.
4. Click save.

New Custom Object Tab

Step 1. Enter the Details

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

Select an existing custom object or [create a new custom object now](#).

Object	Customer Details
Tab Style	Deck

(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—
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Enter a short description.

Description	[Empty Text Area]
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[Next](#) [Cancel](#)

Tab Style Selector

Create your own style

Hide styles which are used on other tabs

	Airplane		Alarm clock		Apple		Balls
	Bank[1]		Bell		Big top		Boat[1]
	Books		Bottle		Box		Bridge
	Building		Building Block		Caduceus		Camera
	Can		Car		Castle		CD/DVD
	Cell phone		Chalkboard		Chess piece		Chip
	Circle		Compass		Computer		Credit card
	CRT TV		Cup		Desk[1]		Diamond
	Dice		Factory		Fan		Flag
	Form		Gears		Globe		Guitar
	Hammer		Hands		Handsaw		Headset
	Heart[1]		Helicopter		Hexagon		Highway Sign
	Hot Air Balloon		Insect		IP Phone		Jewel
	Keys		Laptop		Leaf		Lightning

Save **Cancel**

Step 3. Add to Custom Apps

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	<input type="checkbox"/> Include Tab
Platform (standard_Platform)	<input type="checkbox"/>
Sales (standard_Sales)	<input type="checkbox"/>
Service (standard_Service)	<input type="checkbox"/>
Marketing (standard_Marketing)	<input type="checkbox"/>
Sample Console (standard_ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>

Analytics Studio (standard_Insights)

Sales Console (standard_LightningSalesConsole)

Service Console (standard_LightningService)

Sales (standard_LightningSales)

Lightning Usage App (standard_LightningInstrumentation)

Digital Experiences (standard_SalesforceCMS)

Queue Management (standard_QueueManagement)

Bolt Solutions (standard_LightningBolt)

Data Manager (standard_DataManager)

Salesforce Scheduler Setup (standard_LightningScheduler)

Append tab to users' existing personal customizations

Previous **Save** **Cancel**

Activity 2: 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 .

Milestone 4- The Lightning App:

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

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

Activity 1: 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.

The screenshot shows the Salesforce App Manager interface. At the top, there is a search bar with 'Search Setup' and a 'New Lightning App' button. Below the search bar, there are three main sections: 'App Manager' (with a red box around it), 'Lightning Experience App Manager' (with a red box around it), and 'Clone Apps(Beta)' (with a red box around it). A red arrow points from the 'New Lightning App' button to the bottom section where the app list is displayed. The bottom section shows a table of existing apps, with the first few rows listed below:

App Name	Developer Name	Description	Last Modified	Type
All Tabs	AlTabSet	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic
App Launcher	AppLauncher	App Launcher tabs	04/12/2022, 10:13 am	Classic
Bolt Solutions	Lightningbolt	Discover and manage business solutions designed for your industry.	04/12/2022, 10:18 am	Lightning
Chatter Desktop	Chatter/Desktop	Chatter Desktop is an Adobe AIR-based desktop application that lets Chatter users stay connected...	28/12/2022, 4:04 pm	Connected (Managed)
Chatter Mobile for BlackBerry	ChatterForBlackBerry	The Salesforce.com Chatter Mobile app lets you access Chatter data on the go. Use it to view feed...	28/12/2022, 4:05 pm	Connected (Managed)
College Management System	Nadeem	demo app	08/12/2022, 4:18 pm	Lightning
Community	Community	Salesforce CRM Communities	04/12/2022, 10:13 am	Classic
Content	Content	Salesforce CRM Content	04/12/2022, 10:13 am	Classic
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	04/12/2022, 10:13 am	Lightning

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 Branding
App Name <input type="text" value="Name your app..."/>	Image <input type="button" value="Upload"/> Primary Color Hex Value <input type="color" value="#0070D2"/> #0070D2
Developer Name <input type="text" value="Enter a developer name..."/>	Org Theme Options <input type="checkbox"/> Use the app's image and color instead of the org's custom theme
Description <input type="text" value="Enter a description..."/>	App Launcher Preview

Next

3. To Add Navigation Items:

New Lightning App

Navigation Items

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.

Available Items	Selected Items
<input type="text" value="Type to filter list..."/> Accounts Activities Alert Settings All Sites Alternative Payment Methods App Launcher Appointment Invitations	No items selected

Back Next

Select the items (Customer Details, Appointments, Service records, Billing details and feedback, Reports and Dashboards) from the search bar and move it using the arrow button → Next.

4. To Add User Profiles:

New Lightning App

User Profiles

Choose the user profiles that can access this app.

Available Profiles	Selected Profiles
<input type="text" value="Type to filter list..."/> Analytics Cloud Integration User Analytics Cloud Security User Authenticated Website Authenticated Website Contract Manager Cross Org Data Proxy User Custom: Sales Profile	No Profiles selected

Back Save & Finish

Search profiles (System administrator) in the search bar → click on the arrow button → save & finish.

Milestone 5 : 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

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

- Created By
- Owner
- Last Modified
- Field Made During object Creation

Custom Fields:

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organiser or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

Activity 1: 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.

The screenshot shows the Salesforce Object Manager interface. At the top, there's a search bar with 'cus' and buttons for 'Schema Builder' and 'Create'. Below the header, a table lists two objects: 'Customer' (Standard Object) and 'Customer_Details__c' (Custom Object). The 'Customer_Details__c' row is highlighted with a red border.

Label	API Name	Type	Description	Last Modified	Deployed
Customer	Customer	Standard Object			
Customer Details	Customer_Details__c	Custom Object		05/10/2023	✓

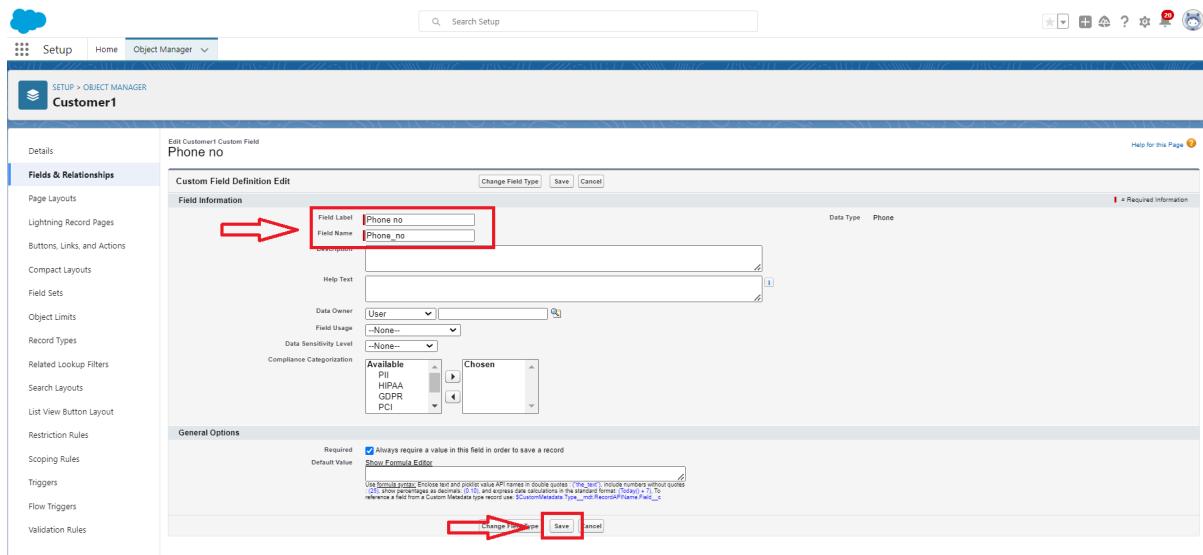
2. Now click on “Fields & Relationships” → New

The screenshot shows the 'Fields & Relationships' page for the 'Customer' object. The left sidebar has 'Fields & Relationships' selected. The main area shows a table of existing fields like 'Created By' and 'Email id'. A red box highlights the 'New' button at the top right of the table, and a red arrow points to it.

3. Select Data Type as a “Phone”

The screenshot shows the 'Fields & Relationships' page for the 'Customer' object. The left sidebar has 'Fields & Relationships' selected. The main area shows a list of field types: Currency, Date, Date/Time, Email, Geolocation, Number, Percent, and Phone. A red box highlights the 'Phone' option, and a red arrow points to its description: 'Allows users to enter any phone number. Automatically formats it as a phone number.'

4. Click on next.



5. Fill the Above as following:

- Field Label: Phone number
- Field Name : gets auto generated
- Click on Next → Next → Save and new.

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

2. To create another fields in an object:

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

Activity 2 : 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.

Object Manager					
LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Appointment	Appointment__c	Custom Object		24/08/2023	✓
Appointment Category	AppointmentCategory	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			

2. Now click on “Fields & Relationships” → New

3. Select “Look-up relationship” as data type and click Next.

Specify the type of information that the custom field will contain.

Data Type

- None Selected
- Auto Number
- Formula
- Roll-Up Summary
- Look-up Relationship
- Master-Detail Relationship

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.

4. Select the related object “Customer Details” and click next.

5. Next → Next → Save.

Note: Make sure you complete Activity 4 Before continuing.

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.

Lookup Options

Related To	Appointment	Child Relationship Name	Service_records
Related List Label	Service records		
Required	<input checked="" type="checkbox"/>	Always require a value in this field in order to save a record	
What to do if the lookup record is deleted?	<input type="radio"/> Clear the value of this field. You can't choose this option if you make this field required. <input checked="" type="radio"/> Don't allow deletion of the lookup record that's part of a lookup relationship.		

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.

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

Hide Filter Settings

Filter Criteria

Field	Operator	Value / Field
Appointment: Appointment Date	less than	Field: Appointment: Created Date

Clear Filter Criteria

And

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.

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

Lookup Window Text

Active Enable this filter.

10. Error Message : Value does not match the criteria.

11. Enable the filter by click on Active.

12. Next → Next → Save.

Creation of Lookup Field on Billing details and feedback Object :

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

Activity 3 : Creation of Checkbox Fields:

Creation of Checkbox Field on Appointment Object :

1. Go to setup → click on Object Manager → type object name(**Appointment**) in search bar → click on the object.
2. Now click on “Fields & Relationships” → New.
3. Select “Check box” as data type and click Next.

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

Data Type
 None Selected
 Auto Number
 Formula
 Roll-Up Summary
 Lookup Relationship
 Master-Detail Relationship
 External Lookup Relationship
 Checkbox
 Currency

Specify the type of information that the custom field will contain.

Select one of the data types below.

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another application.

4. Give the Field Label : Maintenance service
5. Field Name : is auto populated
6. Default value : unchecked

Appointment
New Custom Field
Help for this Page ?

Step 2. Enter the details Step 2 of 4
Previous Next Cancel

Field Label Maintenance service

Default Value Checked Unchecked

Field Name Maintenance_service

Description

Help Text

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

Previous Next Cancel

7. Click on next → next → save.

Creation of Another Checkbox Fields on Appointment Object :

8. Repeat the steps form 1 to 3.
9. Give the Field Label : **Repairs**
10. Field Nme : is auto populated
11. Default value : unchecked
12. Click on next → next → save.

13. Follow the same and create another checkbox with given names
14. Give the Field Label : **Replacement Parts**
15. Field Nme : is auto populated
16. Default value : unchecked
17. 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 Nme : is auto populated
6. Default value : unchecked
7. Click on next → next → save

Activity 4 : Creation of date Fields:

Creation of Date Field on Appointment Object :

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

Appointment
New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label

Field Name

Description

Help Text

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

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

Default Value Show Formula Editor

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

Activity 5 : 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 Nme : is auto populated

Step 2. Enter the details

Field Label: Service Amount

Length: 18

Decimal Places: 0

Field Name: Service_Amount

Description:

Help Text:

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

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

6. Click on next
7. Give read only for all the profiles in field level security for profile.

Appointment
New Custom Field

Step 3. Establish field-level security

Field Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

8. Click on next → save.

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 Nme : is auto populated

Activity 6 : 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 populated
6. Length : 10
7. Make the field as Required and Unique.

Step 2. Enter the details Step 2 of 4

Field Label: Vehicle number plate

Length: 10

Please enter the maximum length for a text field below.

Field Name: Vehicle_number_plate

Description:

Help Text:

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

Unique: Do not allow duplicate values

 Treat "ABC" and "abc" as duplicate values (case insensitive)

 Treat "ABC" and "abc" as different values (case sensitive)

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

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 populated
6. Length : 1
7. Make field as Required .
8. Click on next → next → save

Activity 7 : Creation of Picklist Fields:

Creation of Picklist Fields in Service records object :

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

New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label: Service Status

Values: Use global picklist value set
 Enter values, with each value separated by a new line

Started
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: Service_Status

Description:

6. Click Next.
7. Next → Next → Save.

Creation of Picklist Fields in Billing details and feedback object :

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

Activity 8 : 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.

Step 2. Choose output type Step 2 of 5

Field Label: service date

Field Name: service_date

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

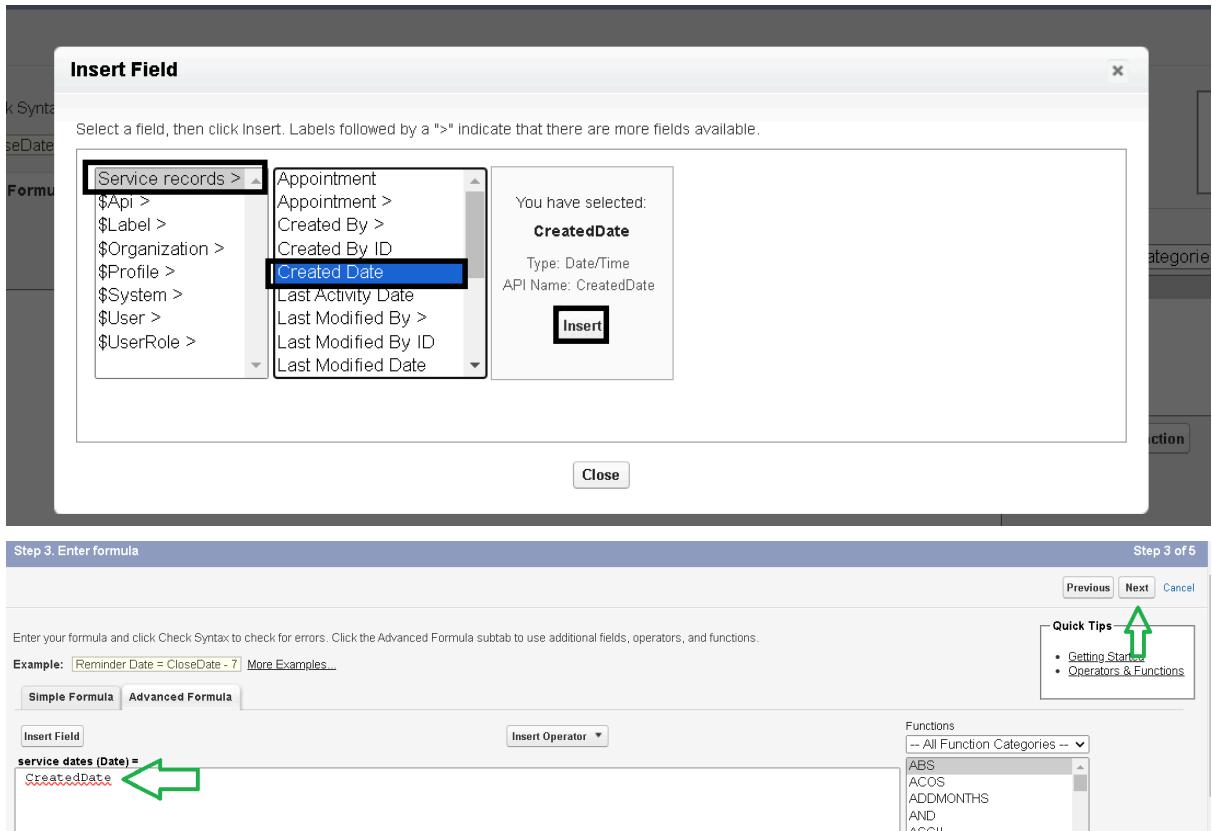
Checkbox Calculate a boolean value
Example: TODAY() > CloseDate

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

Date/Time Calculate a datetime, for example, by adding a number of hours or days to another datetime.
Example: Next = NOW() + 1

5. Insert field formula should be : CreatedDate



6. click “Check Syntax” .
7. Click next → next → Save.

Milestone 6: Validation rule

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

Activity 1: To create a validation rule to an Appointment Object

1. Go to the setup page → click on object manager → From drop down click edit for **Appointment** object.
2. Click on the validation rule → click New.

SETUP > OBJECT MANAGER
Appointment

Validation Rules
1 Items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Vehicle	Vehicle number plate	Please enter valid number	✓	project 2, 25/09/2023, 11:56 am

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}"))

Validation Rule Edit

Save Save & New Cancel

Rule Name Vehicle

Active

Description vehicle

Error Condition Formula

Example: Discount_Percent_c>0.30 More Examples...
Display an error if Discount is more than 30%
If this formula expression is true, display the text defined in the Error Message area

```
NOT (REGEX( Vehicle_number_plate_c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))
```

Functions

- All Function Categories --
- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

Insert Selected Function
ABS(number)
Returns the absolute value of a number, a number without its sign
Help on this function

Check Syntax

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.

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is true

Error Message Please enter valid number

This error message can either appear at the top of the page or below a specific field on the page

Error Location Top of Page Field Vehicle number plate

Save Save & New Cancel

Activity 2: To create a validation rule to an Billing details and feedback Object

1. Go to the setup page → click on object manager → From drop down click edit for **Billing details and feedback** object.
2. Click on the validation rule → click New.
3. Enter the Rule name as “ rating_should_be_less_than_5”.
4. Insert the Error Condition Formula as :-
NOT(REGEX(Rating_for_service__c , "[1-5]{1}"))

The screenshot shows the 'Validation Rule Edit' interface. At the top, there are buttons for Save, Save & New, and Cancel. Below that, the 'Rule Name' field contains 'rating_should_be_less_than_5' with a red box around it. The 'Active' checkbox is checked. The 'Description' field is empty. On the right, a 'Quick Tips' panel has a link to 'Operators & Functions'. At the bottom, the 'Error Condition Formula' field contains the formula 'NOT(REGEX(Rating_for_service__c , "[1-5]{1}"))' with a red box around it. A note at the bottom right says 'R = Required Information'.

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' interface. The 'Error Condition Formula' field contains 'NOT(REGEX(Rating_for_service__c , "[1-5]{1}"))' with a red box around it. A dropdown menu is open over the formula, showing various functions like ACOS, ADDMONTHS, AND, ASCII, ASIN, etc., with 'Insert Selected Function' highlighted. Below the formula, a 'Check Syntax' button is visible. In the 'Error Message' section, the 'Example' field contains 'Discount percent cannot exceed 30%' and the note 'This message will appear when Error Condition formula is true'. The 'Error Message' field contains 'rating should be from 1 to 5' with a red box around it. A note at the bottom says 'This error message can either appear at the top of the page or below a specific field on the page'.

Milestone 7: Duplicate rule

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

1. Go to quick find box in setup and search for **matching Rule**.
2. Click on matching rule → click on New Rule.

Setup Home Object Manager ▾

Q matching ↵

▼ Data

▼ Duplicate Management

Matching Rules ↵

All Matching Rules Help for this Page ⓘ

What Are Matching Rules? [Expand]

View: All Matching Rules Create New View

Action	Rule Name	Object	Status	Description	New Rule																					
A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	Other

3. Select the object as Customer details and click Next.

Matching Rule

New Matching Rule

Help for this Page

Step 1: Select object Step 1 of 2

Select the object to which this matching rule applies.

Object: Customer Details

Next Cancel

Up arrow icon

4. Give the Rule name : Matching customer details
 5. Unique name : is auto populated
 6. Define the matching criteria as
 7.

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

Save Cancel

Rule Details

Object: Customer Details
 Rule Name: matching Customer data 
 Unique Name: matching_Customer_det 
 Description:

Matching Criteria

Tell the rule which fields to compare and how.

Field	Matching Method	Match Blank Fields	AND
Gmail	Exact	<input type="checkbox"/>	AND
Phone Number	Exact	<input type="checkbox"/>	AND
--None--	Exact	<input type="checkbox"/>	AND
--None--	Exact	<input type="checkbox"/>	AND
--None--	Exact	<input type="checkbox"/>	

Add Filter Logic... 

Save Cancel

Matching Rule		matching Customer details			Help for this Page 
Matching Rule Detail		   			
Object	Customer Details				
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	project2, 25/09/2023, 10:15 am			Modified By	project2, 10/10/2023, 3:32 pm

Activity 2: 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.

The screenshot shows the 'Duplicate Rules' page in the Salesforce Setup. The left sidebar has a search bar and navigation links for Data, Duplicate Management, Duplicate Error Logs, Duplicate Rules (which is highlighted with a green box), and Matching Rules. The main area is titled 'All Duplicate Rules' with a sub-section 'What Are Duplicate Rules?'. It shows a table of existing rules, with the 'Customer Details' object highlighted in a green box in the 'Matching Rule' column. The table includes columns for Rule Name, Description, Matching Rule, Active status, Last Modified By, and Last Modified Date.

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

The screenshot shows the 'Edit Duplicate Rule' page for 'Customer Detail duplicate'. The top header says 'Edit Duplicate Rule' and 'Customer Detail duplicate'. The page has tabs for 'Rule Details' and 'Actions'. In 'Rule Details', the 'Rule Name' is 'Customer Detail duplicate' (with a green arrow pointing to it). The 'Object' is 'Customer Details'. Under 'Record-Level Security', 'Enforce sharing rules' is selected. In the 'Actions' section, there are fields for 'Action On Create' (Allow, Alert checked, Report unchecked) and 'Action On Edit' (Allow, Alert unchecked, Report unchecked). An 'Alert Text' field contains 'Use one of these records?' with a green arrow pointing to it. The 'Matching Rules' section is expanded, showing 'Customer Details' selected in the 'Compare Customer Details With' dropdown and 'matching Customer details' selected in the 'Matching Rule' dropdown. The 'Matching Criteria' shows '(Customer_Details: Gmail EXACT MatchBlank = FALSE) AND (Customer_Details: Phone_Number EXACT MatchBlank = FALSE)'. The 'Field Mapping' section has 'Mapping Selected' checked. At the bottom, there are buttons for 'Save', 'Save & New', and 'Cancel'.

Milestone 8 : Profiles

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

Types of profiles in salesforce

1. Standard profiles:

By default salesforce provides below standard profiles.

- Contract Manager
- Read Only
- Marketing User
- Solutions Manager
- Standard User
- System Administrator.

We cannot deleted standard ones

Each of these standard ones includes a default set of permissions for all of the standard objects available on the platform.

2. Custom Profiles:

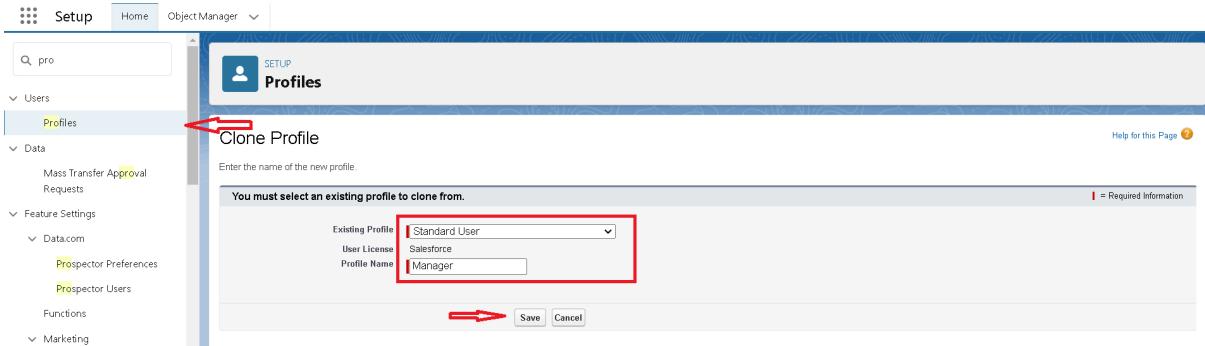
Custom ones defined by us.

They can be deleted if there are no users assigned with that particular one.

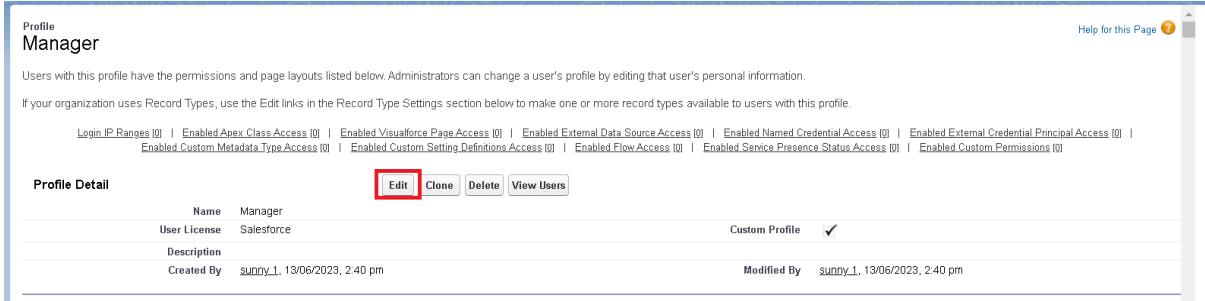
Activity 1: Manager Profile

To create a new profile:

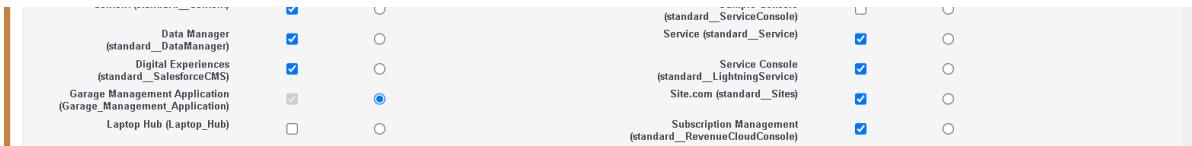
1. Go to setup → type profiles in quick find box → click on profiles → clone the desired profile (Standard User) → enter profile name (Manager) → Save.



2. While still on the profile page, then click Edit.



3. Select the Custom App settings as default for the Garage management.



4. Scroll down to Custom Object Permissions and Give access permissions for Appointments,Billing details and feedback , service records and customer details objects as mentioned in the below diagram.

Custom Object Permissions						
	Basic Access			Data Administration		
	Read	Create	Edit	Delete	View All	Modify All
Appointments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Billing details and feedback	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Customer Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Environments	<input type="checkbox"/>					
Laptops	<input type="checkbox"/>					
Service records	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
SessionData	<input type="checkbox"/>					

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.

Activity 2: sales person Profile

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

Custom Object Permissions												
	Basic Access						Data Administration					
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Appointments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Laptops		<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>							
Billing details and feedback	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Service records		<input checked="" type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>							
Customer Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	SessionData		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>							
Environments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>						

5. And click save.

Milestone 9 : 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.

Activity 1: Creating Manager Role

Creating Manager Role:

1. Go to quick find → Search for Roles → click on set up roles.

The screenshot shows the Salesforce Setup interface. On the left, the navigation sidebar has 'Roles' selected under 'Users'. The main content area is titled 'Understanding Roles' and shows a hierarchical tree of roles. At the top of the hierarchy is 'CEO President'. Below it are 'Western Sales Director' and 'Eastern Sales Director'. Under 'Western Sales Director' are 'Western Sales Rep' and 'CA Sales Rep'. Under 'Eastern Sales Director' are 'NY Sales Rep' and 'WA Sales Rep'. Under 'International Sales Director' are 'Asian Sales Rep' and 'European Sales Rep'. Each role has a description of its permissions. At the bottom right of the 'Understanding Roles' page is a red box around the 'Set Up Roles' button.

2. Click on Expand All and click on add role under whom this role works.

The screenshot shows the 'Your Organization's Role Hierarchy' page. It displays a tree structure of roles under 'Nick Enterprises'. The 'CFO' role is expanded, showing its children: 'HR', 'Manager', 'On Site Emp', and 'Remote Emp'. Each of these child roles has an 'Add Role' button next to it, which is highlighted with a red box. The 'Manager' role is also expanded, showing its child 'On Site Emp'.

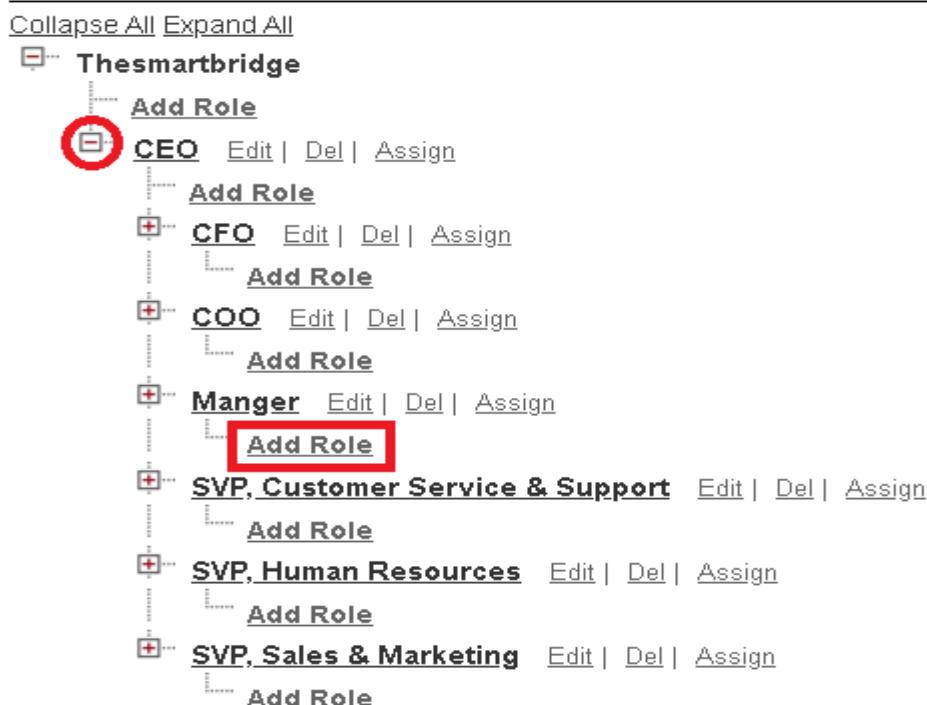
3. Give Label as “Manager” and Role name gets auto populated. Then click on Save.

The screenshot shows the 'Role Edit' interface. At the top, there's a 'Label' input field containing 'Manger' with a red arrow pointing to it. Below it is a 'Role Name' input field also containing 'Manger'. Underneath these are two dropdown menus: 'This role reports to' set to 'CEO' and 'Role Name as displayed on reports' which is empty. At the bottom of the form are four buttons: a red 'Back' button, 'Save', 'Save & New', and 'Cancel'.

Activity 2: Creating another roles

Creating another two roles under manager

1. Go to quick find → Search for Roles → click on set up roles.
2. Click plus on CEO role, and click add role under manager.



3. Give Label as “sales person” and Role name gets auto populated. Then click on Save.

Milestone 10 : 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.

Activity 1: Create User

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

New User

User Edit

General Information

First Name: Niklaus
Last Name: Mikaelson
Alias: nmika
Email:
Username: Mikaelson@Niklaus
Nickname: nik

Role: Manager
User License: Salesforce
Profile: Manager
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--

3. Save.

Activity 2: creating another users

1. Repeat the steps and create another user using
 - a. Role : sales person
 - b. User licence : Salesforce Platform
 - c. Profile : sales person

Note : create atleast 3 users with these permissions.

Milestone 11 : Public groups

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

Activity 1: Creating New Public Group

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

The screenshot shows the Salesforce Setup interface under 'Public Groups'. A search bar at the top contains 'public groups'. Below it, a sidebar has 'Users' selected. The main area is titled 'Public Groups' with a sub-header: 'A public group is a set of users. It can contain individual users, other groups, the users in a particular role or territory, or the users in a role or territory plus all of the users below that role or territory in the hierarchy.' There are buttons for 'View: All' (selected), 'Edit', and 'Create New View'. A navigation bar at the bottom includes links for A through Z and 'Other'. A message at the bottom says ' Didn't find what you're looking for? Try using Global Search.'

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

The screenshot shows the 'New Public Group' dialog box. At the top, there are 'Save' and 'Cancel' buttons. The 'Label' field is filled with 'Sales Team'. The 'Group Name' field is filled with 'Sales_Team'. The 'Grant Access Using Hierarchies' checkbox is checked. Below these, there are two lists: 'Available Members' (containing various roles like Customer Support, Director, Manager, etc.) and 'Selected Members' (containing 'Role: Sales person'). An 'Add' button is between the two lists. At the bottom, there is a link 'Add to Delegated Administration Groups'.

Milestone 12: Sharing Setting

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

Organization-Wide Default (OWD) Settings:

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

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

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

Role Hierarchy:

Salesforce uses a role hierarchy to determine record access.

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

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

Profiles and Permission Sets:

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

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

Sharing Rules:

Sharing rules are used to extend access to records for users who meet specific criteria.

They can be used to grant read-only or read-write access to records owned by other users.

Manual Sharing:

Administrators and record owners can manually share specific records with other users or groups.

Activity 1: 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.

Sharing Settings

Work Plan Template	Private	Private	<input checked="" type="checkbox"/>
Work Step Template	Private	Private	<input checked="" type="checkbox"/>
Work Type	Private	Private	<input checked="" type="checkbox"/>
Work Type Group	Public Read/Write	Private	<input checked="" type="checkbox"/>
Appointment	Public Read/Write	Private	<input checked="" type="checkbox"/>
Billing details and feedback	Public Read/Write	Private	<input checked="" type="checkbox"/>
Customer Details	Public Read/Write	Private	<input checked="" type="checkbox"/>
Environment	Public Read/Write	Private	<input checked="" type="checkbox"/>
Laptop	Public Read/Write	Private	<input checked="" type="checkbox"/>
Service records	Private	Private	<input checked="" type="checkbox"/>
SessionData	Public Read/Write	Private	<input checked="" type="checkbox"/>

User Visibility Settings

Portal User Visibility	<input type="checkbox"/>
Site User Visibility	<input type="checkbox"/>

Other Settings

Standard Report Visibility	<input checked="" type="checkbox"/>
Manual User Record Sharing	<input type="checkbox"/>
Manager Groups	<input type="checkbox"/>
Minimize the number of roles created, which improves performance by cutting down processing loads	
Grant site users access to related cases	<input checked="" type="checkbox"/>
Secure record access	<input checked="" type="checkbox"/>
Require permission to view record names in lookup fields	<input type="checkbox"/>

Buttons: Save (highlighted with a red box), Cancel

3. Click on save and refresh.
4. Scroll down a bit, Click new on Service records sharing Rules.
- 5.

Service records Sharing Rules

(Red arrow points to the "New" button)

New Recalculate Service records Sharing Rules Help ?

No sharing rules specified.

6. Give the Label name as “ Sharing setting”
7. Rule name is auto populated.
8. In step 3 : Select which records to be shared, members of “ Roles ” >> “ Sales person”
9. In step 4: share with, select “ Roles ” >> “ Manager ”
10. In step 5 : Change the access level to “ Read / write ”.
11. Click on save.

Sharing Settings

You can use sharing rules only to grant wider access to data, not to restrict access. ! = Required Information

Step 1: Rule Name

Label	sharing settings	(Red arrow points to the "sharing settings" input field)
Rule Name	sharing_settings	<input type="checkbox"/>
Description	<input type="text"/>	

Step 2: Select your rule type

Rule Type	<input checked="" type="radio"/> Based on record owner	<input type="radio"/> Based on criteria
-----------	--	---

Step 3: Select which records to be shared

Service records: owned by members of	Roles	Sales person	(Red arrow points to the "Sales person" dropdown)
--------------------------------------	-------	--------------	---

Step 4: Select the users to share with

Share with	Roles	Manager	(Red arrow points to the "Manager" dropdown)
------------	-------	---------	--

Step 5: Select the level of access for the users

Access Level	Read/Write	(Red arrow points to the "Read/Write" dropdown)
--------------	------------	---

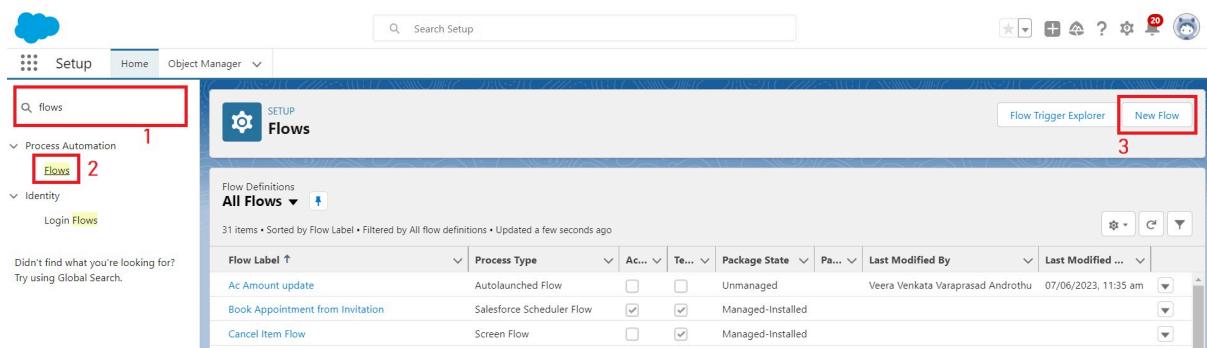
Buttons: Save (highlighted with a red box), Cancel

Milestone 13: Flows

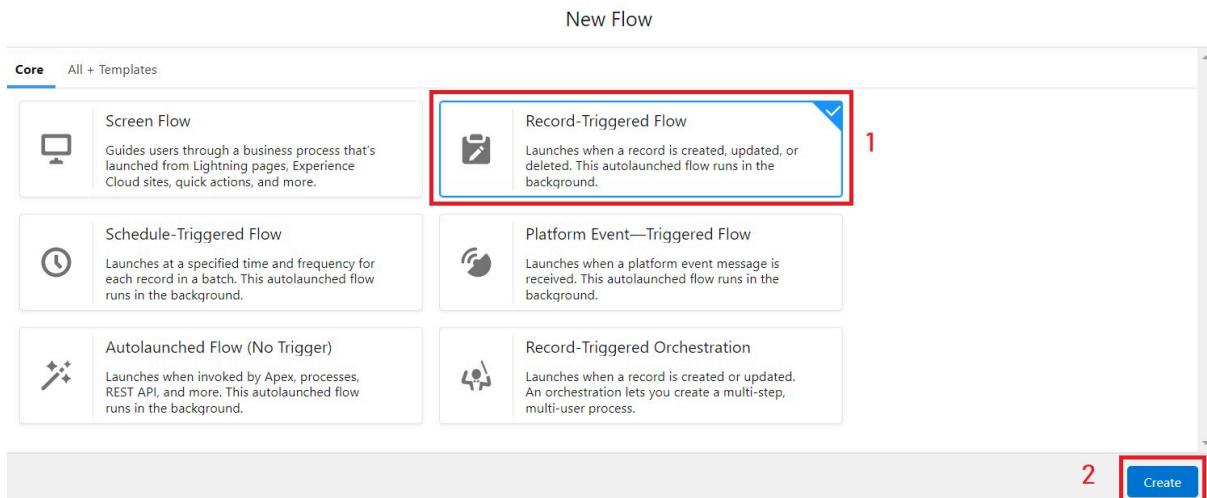
In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

Activity 1: 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.

Configure Start

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

***Object**

Billing details and feedback

Configure Trigger

***Trigger the Flow When:**

- A record is created
- A record is updated
- A record is created or updated
- A record is deleted



Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

None

*Optimize the Flow for:

Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

Actions and Related Records

Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.



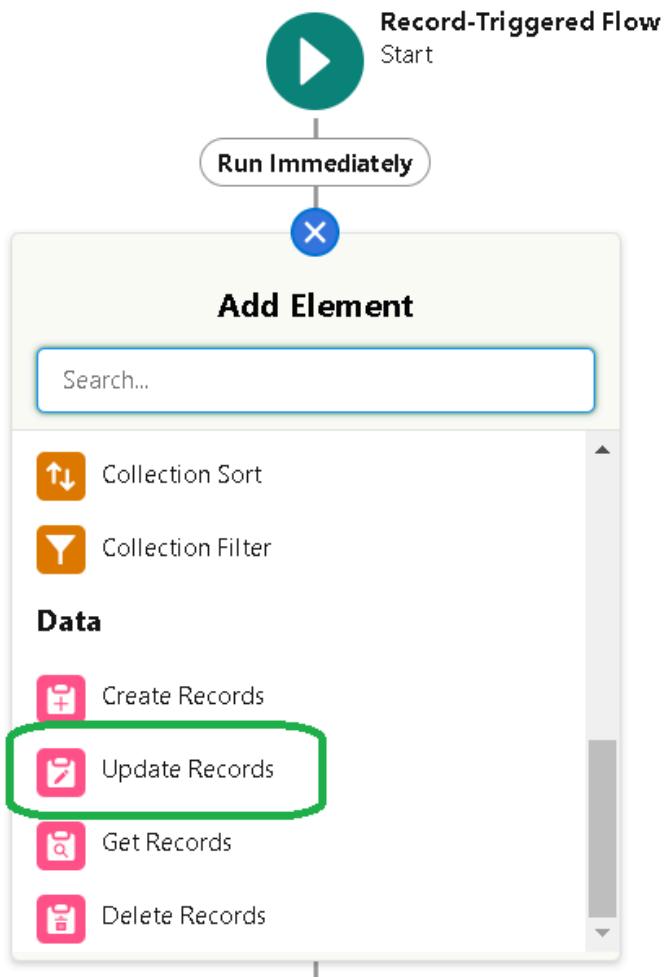
4

Cancel

Done



6. Under the Record-triggered Flow Click on “+” Symbol and In the Drop down List select the “Update records Element”.



7. Give the Label Name : Amount Update
8. Api name : is auto populated

Edit Update Records

Update Salesforce records using values from the flow.

*Label	*API Name
Amount Update	Amount_Update
Description	
<input type="text"/>	

***How to Find Records to Update and Set Their Values**

- Use the billing details and feedback record that triggered the flow
- Update records related to the billing details and feedback record that triggered the flow
- Use the IDs and all field values from a record or record collection
- Specify conditions to identify records, and set fields individually

Set Filter Conditions

Condition Requirements to Update Record

All Conditions Are Met (AND)

Cancel Done

Set Filter Conditions

Condition Requirements to Update Record

All Conditions Are Met (AND)

Field	Operator	Value
Payment_Status__c	Equals	Completed

+ Add Condition

Set Field Values for the Billing details and feedback Record

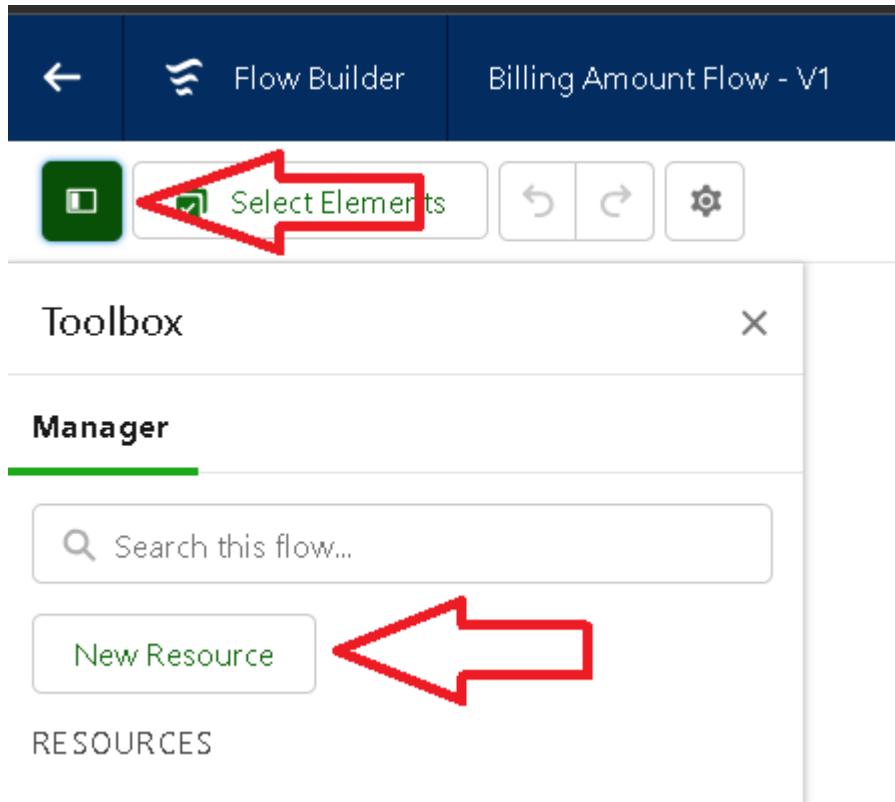
Field	Value
Payment_Paid__c	\$Record > Service records > Appointment > Service A...

+ Add Field

Cancel Done

9. Set a filter condition : All Conditions are met(AND)
10. Field : Payment_Status__c
11. Operator : Equals
12. Value : Completed
13. And Set Field Values for the Billing details and feedback Record
14. Field : Payment_Paid__c
15. Value : {\$Record.Service_records__r.Appointment__r.Service_Amount__c}
16. Click On Done.

17. Before creating another Element. Create a New Resource form Toolbox form top left.



18. Click on the New Resource, And select Variable.

19. Select the resource type as text template.

20. Enter the API name as “ alert”.

21. Change the view as Rich Text → View to Plain Text.

22. In body field paste the syntax that given below.

Dear

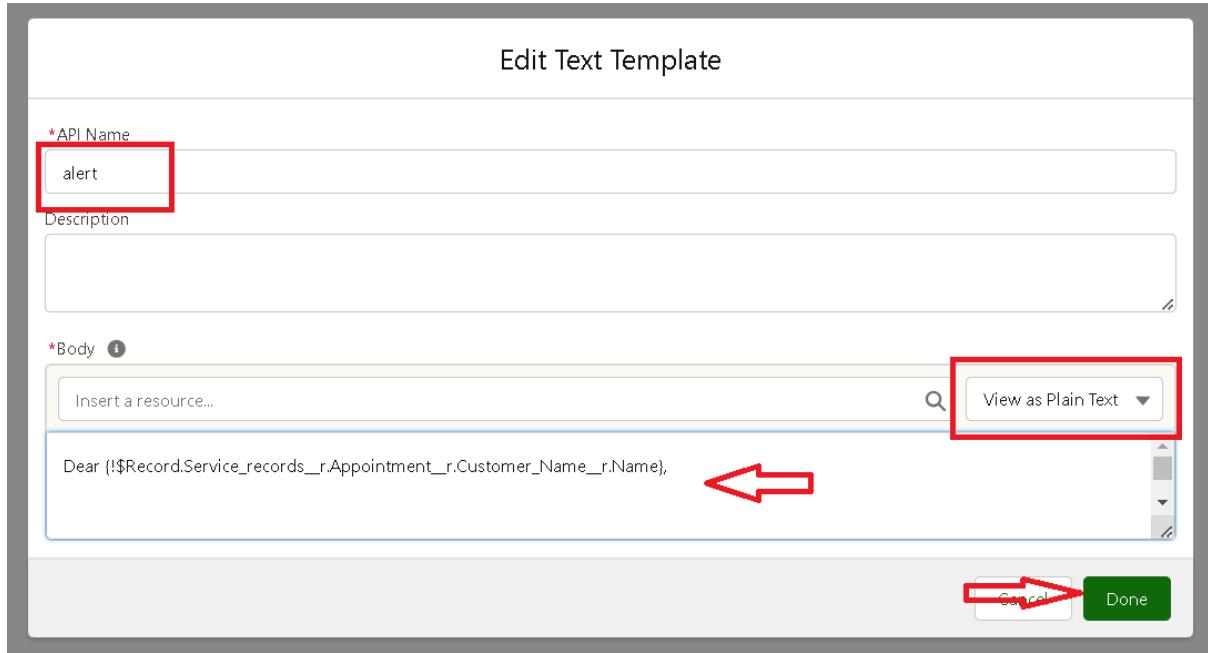
{!\$Record.Service_records__r.Appointment__r.Customer_Name__r.Name},

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

Amount paid : {!\$Record.Payment_Paid__c}

Thank you for Coming .

23. Click done.



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

Edit Action

Use values from earlier in the flow to set the inputs for the "Send Email" core action. To use its outputs later in the flow, store them in variables.

*Label	*API Name
Email Alert	Email_Alert
Description	
<pre>{!alert}</pre>	

Set Input Values for the Selected Action

A_a Body	<input checked="" type="checkbox"/> Include
{!alert}	
A_a Email Template ID	<input type="checkbox"/> Don't Include
A_a Log Email on Send	<input type="checkbox"/> Don't Include

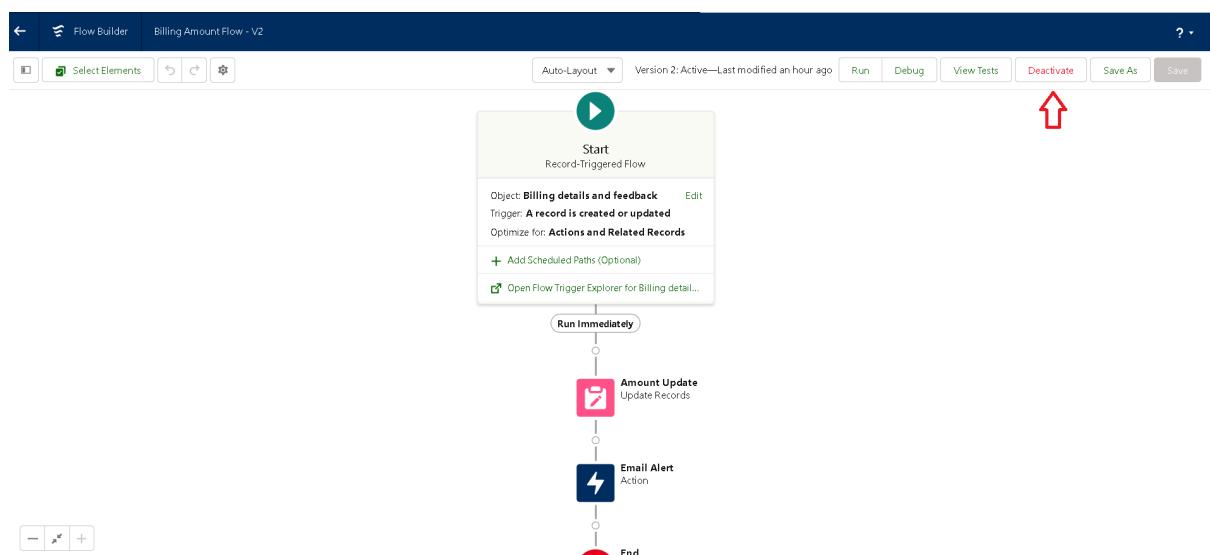
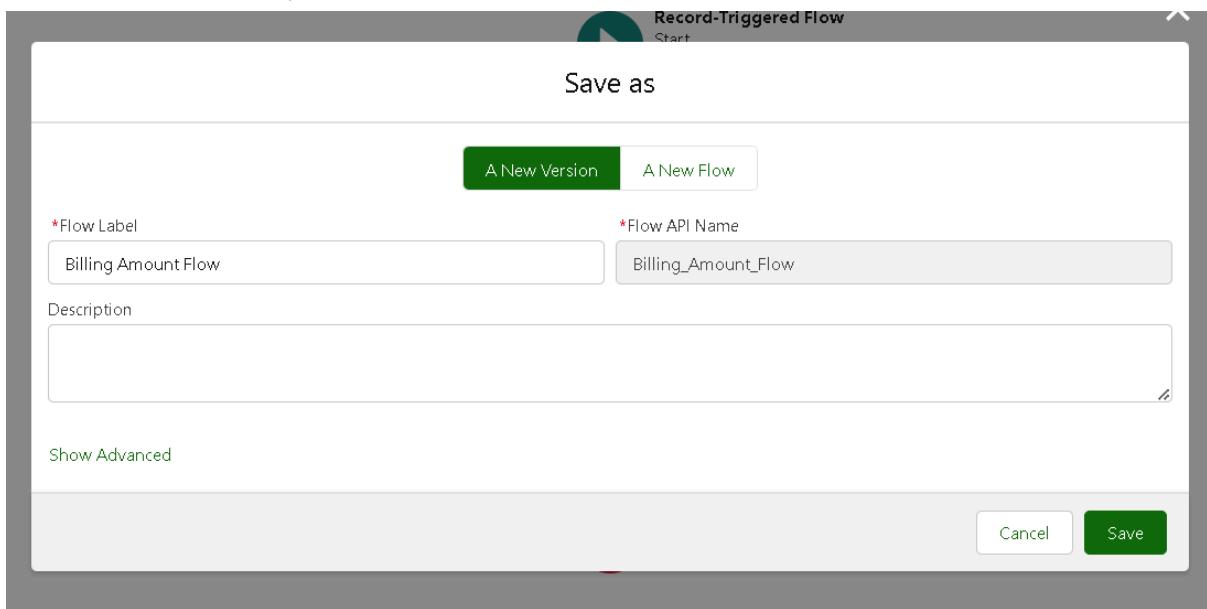
Edit Action

A_a Recipient Address List	<input checked="" type="checkbox"/> Include
{!\$Record.Service_records__r.Appointment__r.Cus}	
A_a Recipient ID	<input type="checkbox"/> Don't Include
A_a Related Record ID	<input type="checkbox"/> Don't Include
A_a Rich-Text-Formatted Body	<input type="checkbox"/> Don't Include
A_a Sender Email Address	<input type="checkbox"/> Don't Include
A_a Sender Type	<input type="checkbox"/> Don't Include
A_a Subject	<input checked="" type="checkbox"/> Include
Thank You for Your Payment - Garage Manageme	

Cancel Done

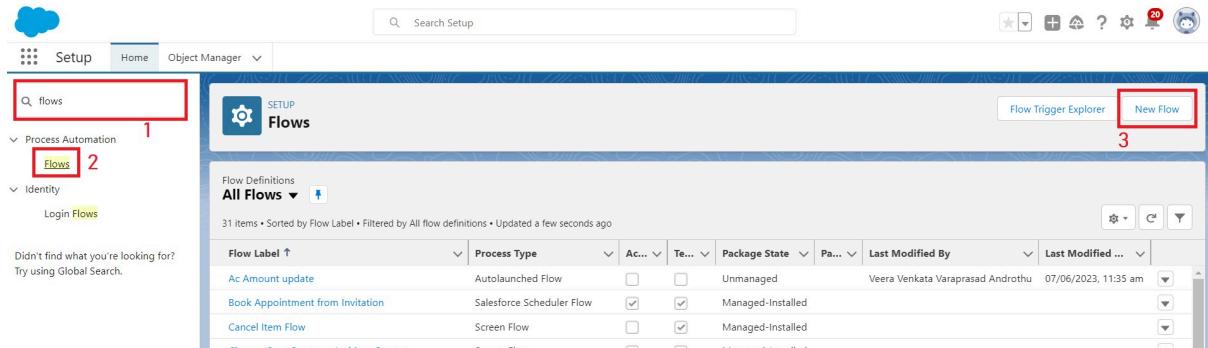
34. Click on save. Give the Flow label , Flow Api name will be autopopulated.

35. And click save, and click on activate.

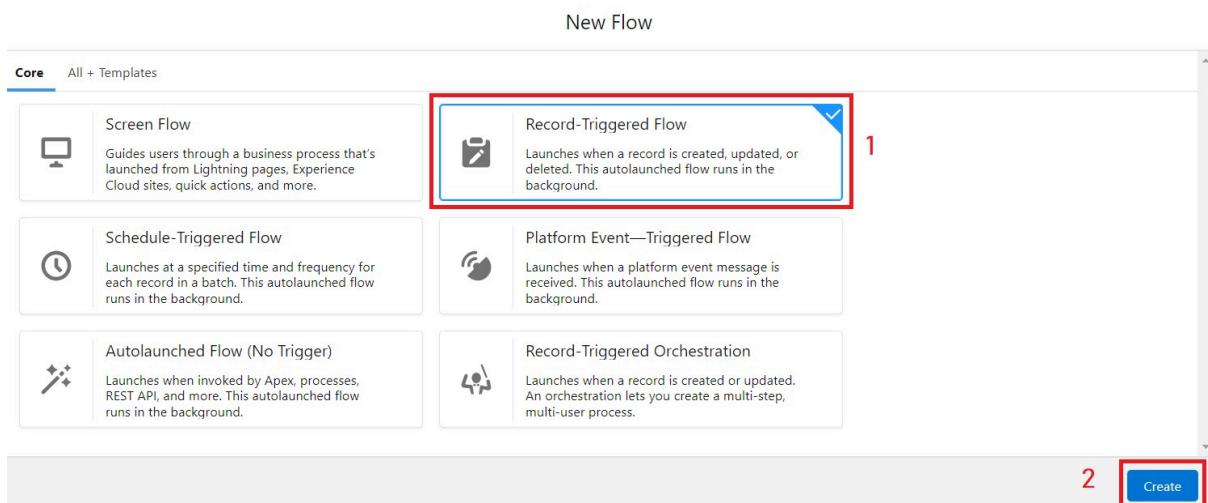


Activity 2: Create another Flow

36. Go to setup → type Flow in quick find box → Click on the Flow and Select the New Flow.



37. Select the Record-triggered flow and Click on Create.



38. Select the Object as “ Service records”in the Drop down list.

39. Select the Trigger Flow when: “A record is Created or Updated”.

40. Select the Optimise the flow for: “Actions and Related Records” and Click on Done.

41. Under the Record-triggered Flow Click on “+” Symbol and In the Drop down List select the “Update records Element”.

42. Set a filter condition : All Conditions are met(AND)

43. Field : Quality_Check_Status__c

44. Operator : Equals

45. Value : True

46. And Set Field Values for the Billing details and feedback Record

47. Field : Service_Status__c

48. Value : Completed

The screenshot shows the Salesforce Flow builder interface. At the top, it says "Condition Requirements to Update Record" with a dropdown menu set to "All Conditions Are Met (AND)". Below this, the "Set Filter Conditions" section contains a single condition: "Field Quality_Check_Status_c Operator Equals Value True". A "Delete" icon is next to the value field. A "Add Condition" button is available. In the "Set Field Values for the Service record Record" section, there is one field set: "Service_Status_c" with a value of "Completed". A "Delete" icon is next to the value field. An "Add Field" button is available.

49. Click On Done.

50. Click on save

51. Given the Flow label as **Update Service Status** , Flow Api name will be auto populated.

52. And click save, and click on activate.

Milestone 14:Apex Trigger

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

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

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

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

You can define triggers for top-level standard objects that support triggers, such as a Contact or an Account, some standard child objects, such as a CaseComment, and custom objects. To define a trigger, from the object management settings for the object whose triggers you want to access, go to Triggers.

There are primarily two types of Apex Triggers:

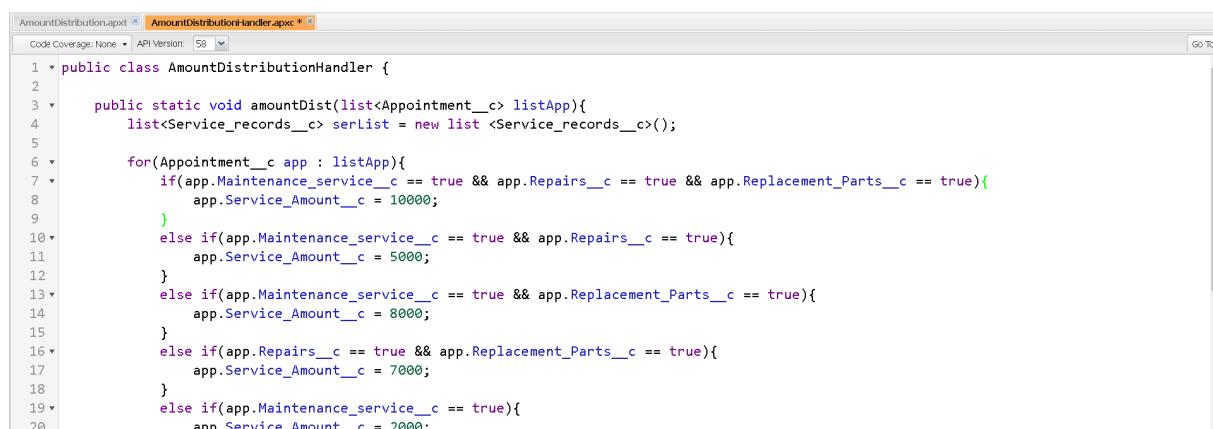
Before Trigger: This type of trigger in Salesforce is used either to update or validate the values of a record before they can be saved into the database. So, basically, the before trigger validates the record first and then saves it. Some criteria or code can be set to check data before it gets ready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

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

Activity- 1: Apex handler

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

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



The screenshot shows the Salesforce Developer Console interface. The title bar displays "AmountDistribution.apxt" and "AmountDistributionHandler.apxc". The code editor contains the following Apex class definition:

```
1 * public class AmountDistributionHandler {  
2  
3     public static void amountDist(list<Appointment__c> listApp){  
4         list<Service_records__c> serList = new list<Service_records__c>();  
5  
6         for(Appointment__c app : listApp){  
7             if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){  
8                 app.Service_Amount__c = 10000;  
9             }  
10            else if(app.Maintenance_service__c == true && app.Repairs__c == true){  
11                app.Service_Amount__c = 5000;  
12            }  
13            else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){  
14                app.Service_Amount__c = 8000;  
15            }  
16            else if(app.Repairs__c == true && app.Replacement_Parts__c == true){  
17                app.Service_Amount__c = 7000;  
18            }  
19            else if(app.Maintenance_service__c == true){  
20                app.Service_Amount__c = 2000;  
21        }  
22    }  
23}
```

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

Code:

```
public class AmountDistributionHandler {

    public static void amountDist(list<Appointment__c> listApp){
        list<Service_records__c> serList = new list <Service_records__c>();

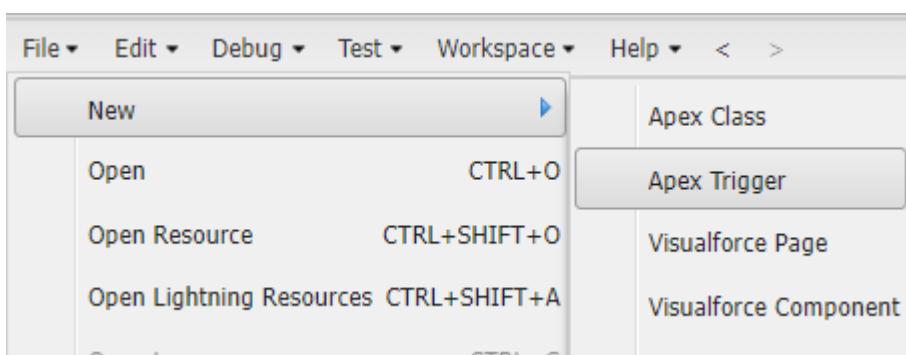
        for(Appointment__c app : listApp){
            if(app.Maintenance_service__c == true && app.Repairs__c == true &&
app.Replacement_Parts__c == true){
                app.Service_Amount__c = 10000;
            }
            else if(app.Maintenance_service__c == true && app.Repairs__c ==
true){
                app.Service_Amount__c = 5000;
            }
            else if(app.Maintenance_service__c == true &&
app.Replacement_Parts__c == true){
                app.Service_Amount__c = 8000;
            }
            else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
```

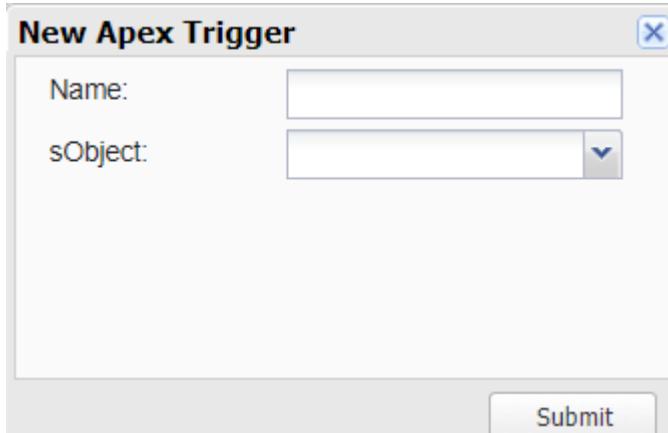
```
    app.Service_Amount__c = 7000;
}
else if(app.Maintenance_Service__c == true){
    app.Service_Amount__c = 2000;
}
else if(app.Repairs__c == true){
    app.Service_Amount__c = 3000;
}
else if(app.Replacement_Parts__c == true){
    app.Service_Amount__c = 5000;
}
}
```

Trigger Handler :

How to create a new trigger :

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





Syntax For creating trigger :

The syntax for creating trigger is :

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

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

1. Handler for the Appointment Object

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

Code:

```

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

    if(trigger.isbefore && trigger.isinsert || trigger.isupdate){
        AmountDistributionHandler.amountDist(trigger.new);

    }

}

```

Milestone-15: User Adoption

Activity 1 : creating record

To create a record in the follow objects follow these steps

1. Click on the app launcher located at the left side of the screen.
2. Search for “ Garage Management” and click on it.
3. Click on the “ Consumer details tab”.
4. Click on new and fill the details as shown below figs, and click save.

New Customer Detail

* = Required Information

Information

* Customer Name	Mac
Phone number	5678765567
Gmail	mac@gmail.com

Owner: Annapurna SmartBridge

Cancel Save & New Save

Now, Create the Appointment Record

1. Click on the “Appointment tab”.
2. Enter the customer details as created, while entering **Appointment Date** enter the date less than the created date.
3. Match the validation while entering the **vehicle number plate**.
4. Select the services you need.
5. Click on save to see the **Service Amount**.

The screenshot shows the Garage Management System interface. The top navigation bar includes links for Customer Details, Appointments, Service records, Billing details and feedback, Reports, and Dashboards. The current page is 'Appointments'. The main content area displays an appointment record titled 'Appointment app-016'. The form fields include:

- Appointment Name:** app-016
- Customer Details:** Mac
- Appointment Date:** 13/11/2024
- Maintenance service:**
- Repairs:**
- Replacement Parts:**
- Service Amount:** (empty input field)
- *Vehicle number plate:** TS30EU0443

At the bottom, it shows 'Created By: Annapurna SmartBridge, 18/11/2024, 3:28 pm' and 'Last Modified By: Annapurna SmartBridge, 18/11/2024, 3:28 pm'. There are 'Cancel' and 'Save' buttons.

Now, Create a service Record

1. Click on the “Service record tab”.
2. Enter the Appointment, and started is selected as default.
3. Click on save.

The screenshot shows a 'New Service record' dialog. At the top right, it says '* = Required Information'. The 'Information' tab is selected. The form fields include:

- Service Record Name:** app-016
- Owner:** Annapurna SmartBridge
- *Appointment:** app-016
- Quality Check Status:**
- Service Status:** Started

At the bottom, there are 'Cancel', 'Save & New', and 'Save' buttons.

4. Open the record and click on Quality check status as true.
5. Click on save.

Service Record Name
ser-010

Owner
 Annapurna SmartBridge

* Appointment
 app-016

Quality Check Status

Service Status
Started

service date
18/11/2024
This field is calculated upon save

Created By
 Annapurna SmartBridge, 18/11/2024, 4:32 pm

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

6. Now automatically Service status will be moved to completed.

Related [Details](#)

Service Record Name ser-010	Owner  Annapurna SmartBridge
Appointment app-016	
Quality Check Status <input checked="" type="checkbox"/>	
Service Status Completed	
service date 18/11/2024	
Created By  Annapurna SmartBridge, 18/11/2024, 4:32 pm	Last Modified By  Annapurna SmartBridge, 18/11/2024, 4:34 pm

Milestone 16 : Reports

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

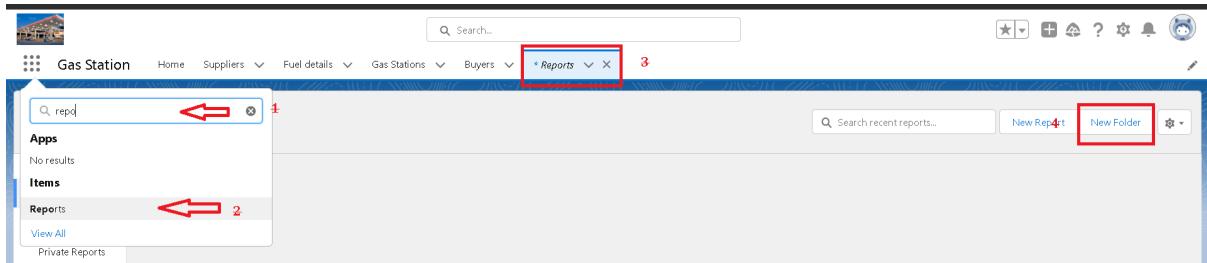
Types of Reports in Salesforce

1. Tabular
2. Summary
3. Matrix

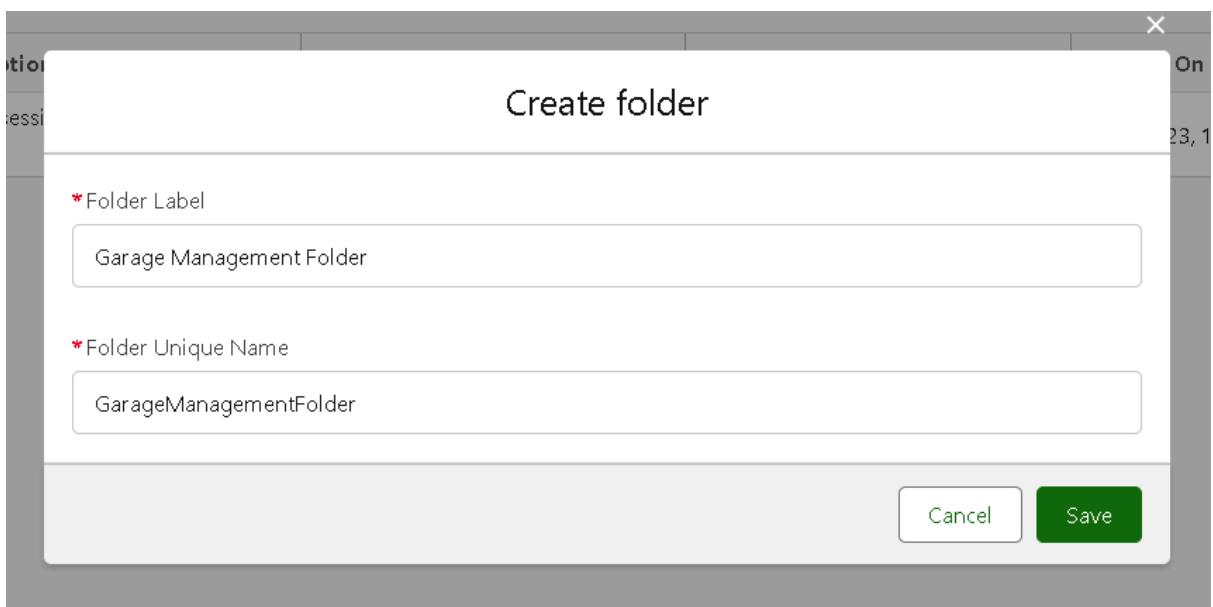
4. Joined Reports

Activity 1: create a report folder

1. Click on the app launcher and search for reports.
2. Click on the report tab, click on new folder.

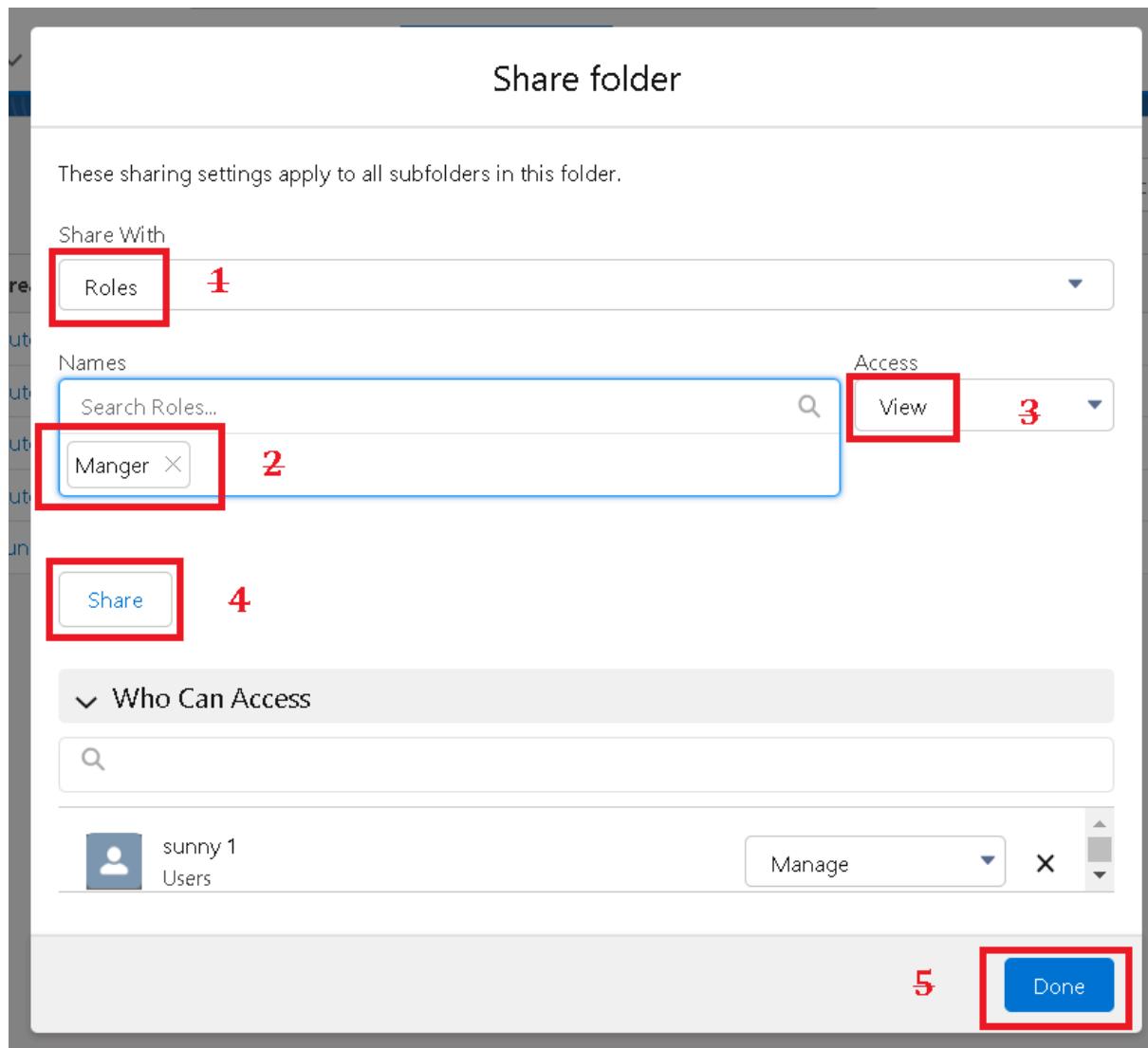


3. Give the Folder label as “Garage Management Folder”, Folder unique name will be auto populated.
4. Click save.



Activity 2: Sharing a report folder

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



Activity 3: Create Report Type

1. Go to setup → type users in quick find box → select Report Type → click on Continue.
2. Click on new custom report type.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar has sections for 'Feature Settings' and 'Analytics', with 'Report Types' highlighted by a green arrow. The main content area is titled 'Report Types' and shows 'All Custom Report Types'. It includes a search bar, a 'View' dropdown, and a 'Create New View' button. Below is a table with columns for 'Action', 'Label', 'Description', 'Category', 'Deployed', 'Created By Alias', and 'Created Date'. The table lists four report types: 'Bot Metrics Daily Summer '23', 'Bot Metrics Hourly Summer '23', 'Screen Flows', and 'Session Metrics Summer '23'. A green arrow points to the 'New Custom Report Type' button at the top right of the table. The bottom of the page has navigation links for letters A-Z and a 'All' link.

Action	Label	Description	Category	Deployed	Created By Alias	Created Date
Edit Del	Bot Metrics Daily Summer '23	Einstein Bot metrics aggregated by day.	Other Reports	✓	autoproc	28/08/2023
Edit Del	Bot Metrics Hourly Summer '23	Einstein Bot metrics aggregated by hour.	Other Reports	✓	autoproc	28/08/2023
Edit Del	Screen Flows	Find out which flows get executed and how long users take to complete each flow screen.	Other Reports	✓	autoproc	24/08/2023
Edit Del	Session Metrics Summer '23	Einstein Bot session metrics	Other Reports	✓	autoproc	28/08/2023

3. Select the Primary object as “ Customer details” .
4. Give the Report type Label as “ Service information ”
5. Report type Name is autopopulated.
6. Keep the Description as same.
7. Select Store in Category as “ other Reports ”
8. Select the deployment status as “ Deployed ”, click on Next.

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: Service information

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: Deployed

Next **Cancel**

9. now , Click on Related object box.
10. Click on Select Object, choose Appointment Object as shown in fig.

New Custom Report Type
Service information

Help for this Page ?

Step 2 of 2

Step 2. Define Report Records Set

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 Select Object...
--Select Object--
Activities
Appointments
Duplicate Record Items

Diagram: Two overlapping circles labeled A and B. Circle A is blue and circle B is orange. They overlap in the center. An arrow points from the text "One related 'B' record." to the center of the overlap. Another arrow points from the text "Multiple related 'A' records." to the bottom of circle B.

Previous Save Cancel

Step 2. Define Report Records Set

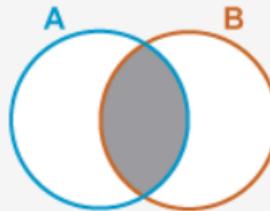
This report type will generate reports about Customer Details. You may define which related records from other objects are returned in report results by choosing a relationship to another object.

A Customer Details
 Primary Object

B Appointments

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

...
 (Click to relate another object)





11. Again Click to relate another object.
12. And select the related object as “ service records”.
13. Repeat the process and select the related object as “ Billing details and feedback”.
14. And click on save.

SETUP 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.
 "A" records may or may not have related "B" records.

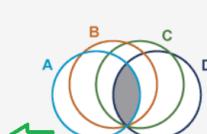
C Service records

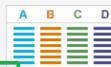
B to C Relationship:
 Each "B" record must have at least one related "C" record.
 "B" records may or may not have related "C" records.

D Billing details and feedback

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

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





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

Activity 4: Create Report

**Note : Before creating report, create latest “10” records in every object.
Try to fill every field in each record for better experience.**

1. Go to the app → click on the reports tab
2. Click New Report.

The screenshot shows the ServiceNow interface with the 'Employee Manage...' application selected. The top navigation bar includes 'Home', 'Employees', 'Assets', 'Asset Services', 'Projects', 'ProjectTasks', 'Reports' (which is highlighted with a red box), and 'Dashboards'. Below the navigation is a search bar and a 'New Report' button also highlighted with a red box. The main content area displays a table of recent reports, with columns for 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. There are links for 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', and 'All Reports' under the 'REPORTS' section. A 'FOLDERS' section is also present.

3. Select the Category as other reports, search for Service Information, select that report, click on it. And click on start report.

The screenshot shows the 'Create Report' dialog. On the left, a sidebar lists categories like Customer Support Reports, Leads, Campaigns, Activities, Contracts and Orders, Price Books, Products and Assets, Administrative Reports, File and Content Reports, Individuals, and 'Other Reports' (which is selected and highlighted with a green box). In the center, a search bar finds 'Service information'. The results table shows 'Service records' (Standard), 'Service records with Appointment' (Standard), 'Service records History' (Standard), 'Billing details and feedback with Service records' (Standard), and 'Service information' (Custom). A green arrow points from the 'Category' dropdown in the search results to the 'Custom' entry. On the right, the 'Details' pane for 'Service information' shows a 'Start Report' button and sections for 'Description' (Service information), 'Created By You' (No Reports Yet), and 'Created By Others' (No Reports Yet).

4. Their outline pane is opened already, select the fields that are mentioned below in the column section.
 - a. Customer name
 - b. Appointment Date
 - c. Service Status
 - d. Payment paid
5. Remove the unnecessary fields.
6. Select the fields that mentioned below in GROUP ROWS section.
 - a. Rating for Service
7. Select the fields that mentioned below in GROUP ROWS section.
 - a. Payment Status
8. Click on Add Chart , Select the Line Chart.
9. Click on save, Give the report Name : New Service information Report
10. Report unique Name is auto populated.
11. Select the folder the created and Click on save.

The screenshot shows two overlapping interface elements. The top element is a report preview titled "Service information". It includes a sidebar with "Fields" sections for "Groups" (Rating for service), "Rating for service", "GROUP COLUMNS" (Payment Status), and "Columns" (Customer Name, Appointment Date, Service Status, Payment Paid). The main area displays a table with 5 rows and a chart showing a downward trend from rating 4 to 5. The bottom element is a "Save Report" dialog box. It has fields for "Report Name" (New Service information Report), "Report Unique Name" (New_Service_information_Report_oVu), "Report Description" (empty), and "Folder" (Garage Management Folder). A green arrow points to the "Report Name" field. Another green arrow points to the "Folder" field. At the bottom right of the dialog are "Cancel" and "Save" buttons.

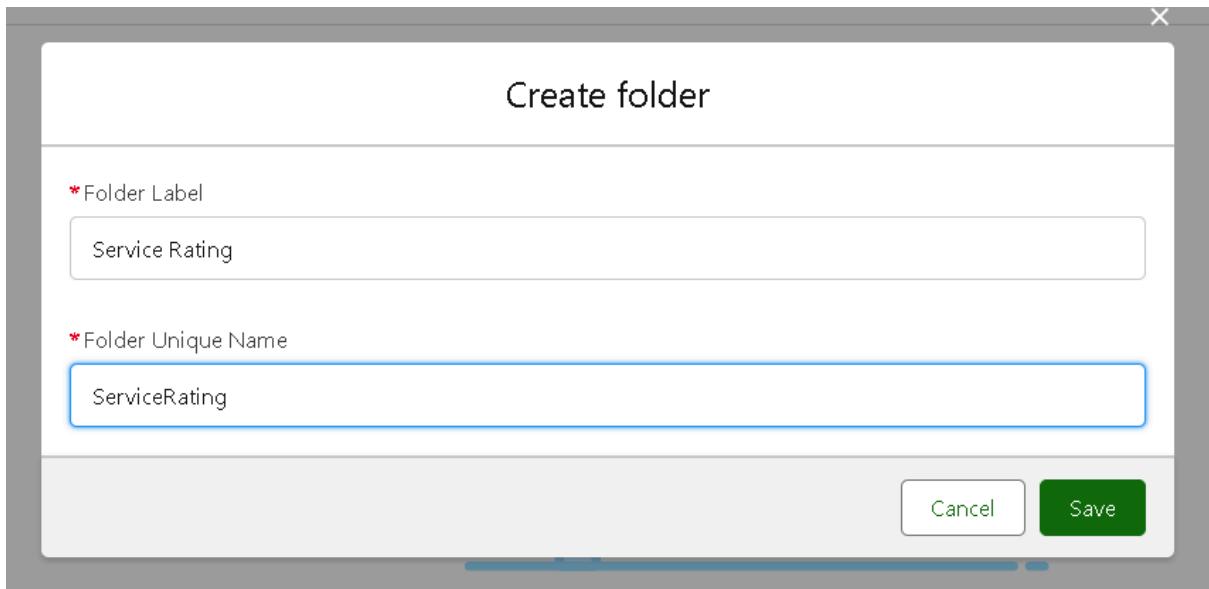
Milestone 17 : Dashboards

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

Activity 1: Create Dashboard Folder

1. Click on the app launcher and search for dashboard.

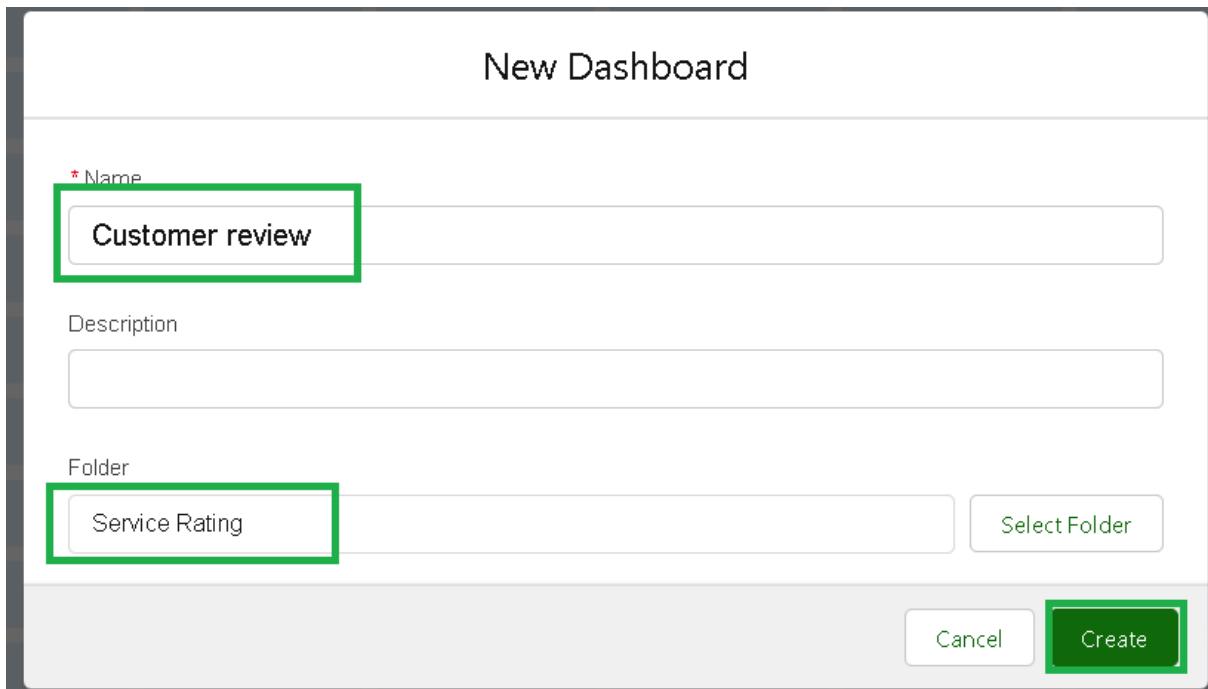
2. Click on dashboard tab.
3. Click new folder, give the folder label as “ Service Rating dashboard”.
4. Folder unique name will be auto populated.
5. Click save.



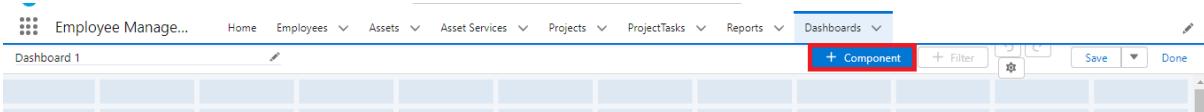
6. Follow the same steps, from milestone 15, and activity 2, and provide the sharing settings for the folder that just created.

Activity 2: Create Dashboard

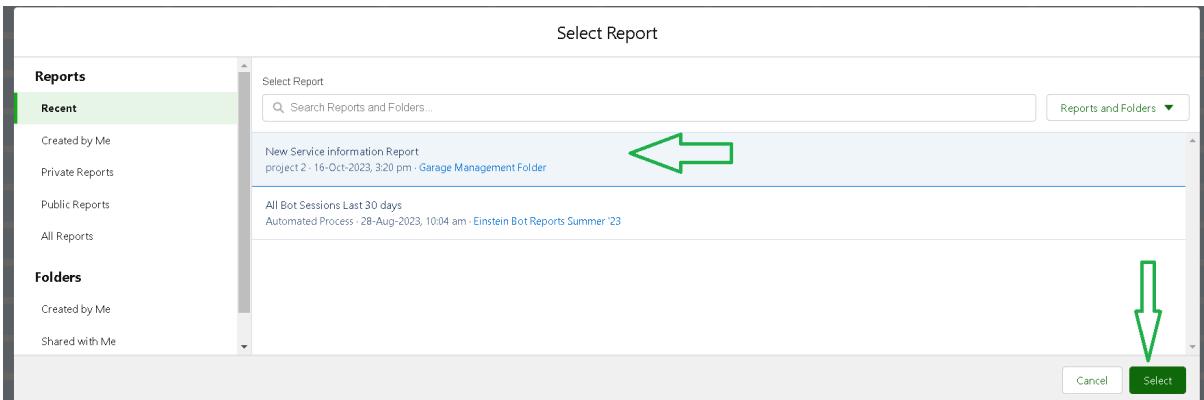
1. Go to the app → click on the Dashboards tabs.
2. Give a Name and select the folder that created, and click on create.



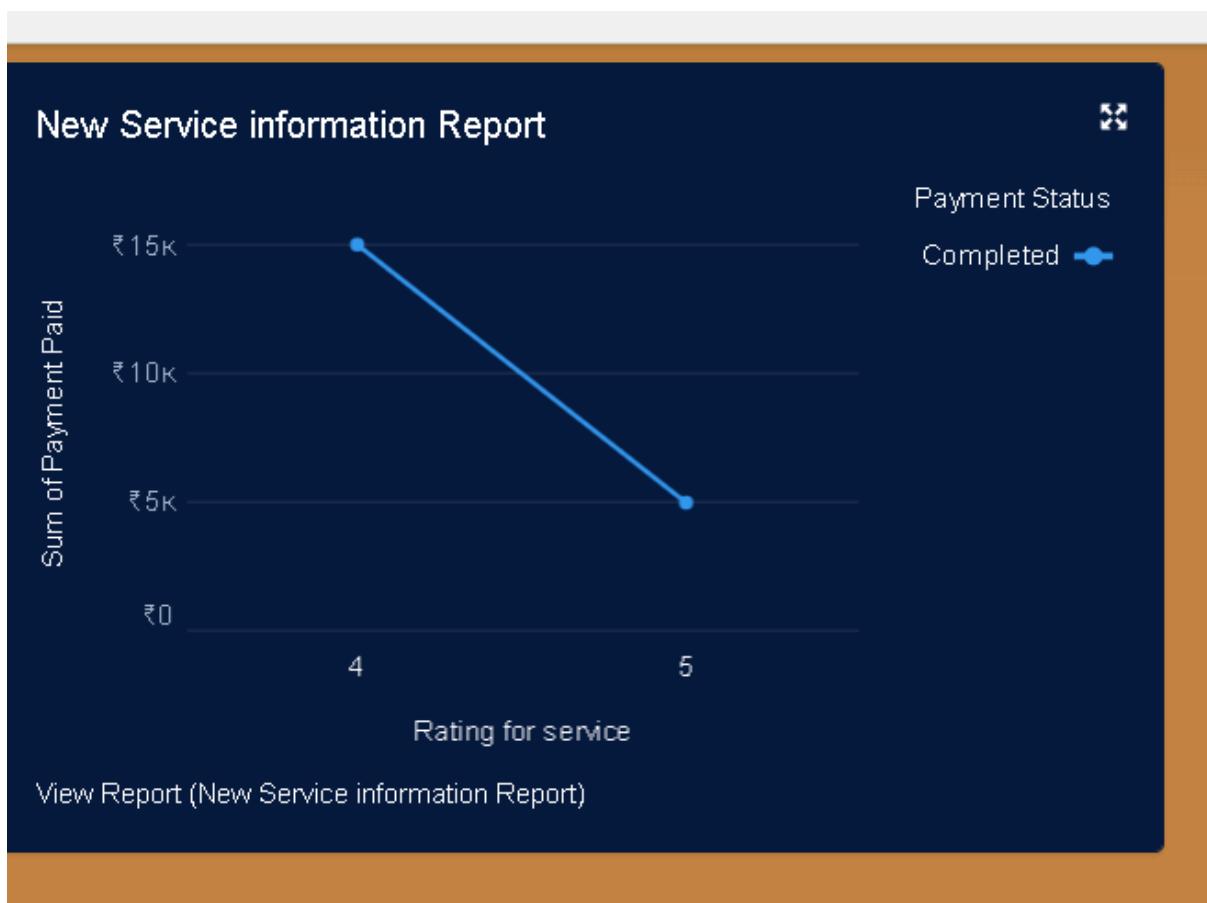
3. Select add component.



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.



8. After that Click on Subscribe on top right.
9. Set the Frequency as “ weekly ”.
10. Set a day as monday.
11. And Click on save.

Edit Subscription

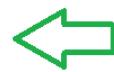
Schedule dashboard refreshes and subscribe to receive results.

Settings

Frequency



Days



Time

Recipients

Receive new results by email when dashboard is refreshed. ?

Send email to

Me

