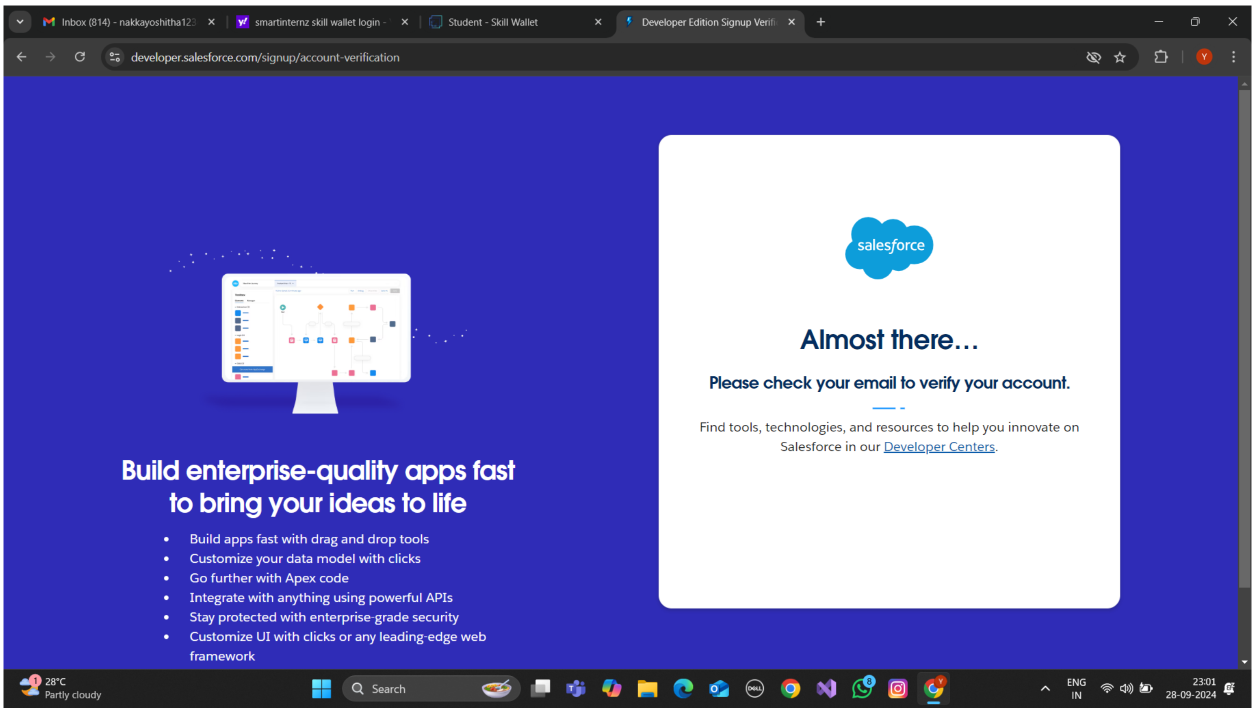
Salesforce login:

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

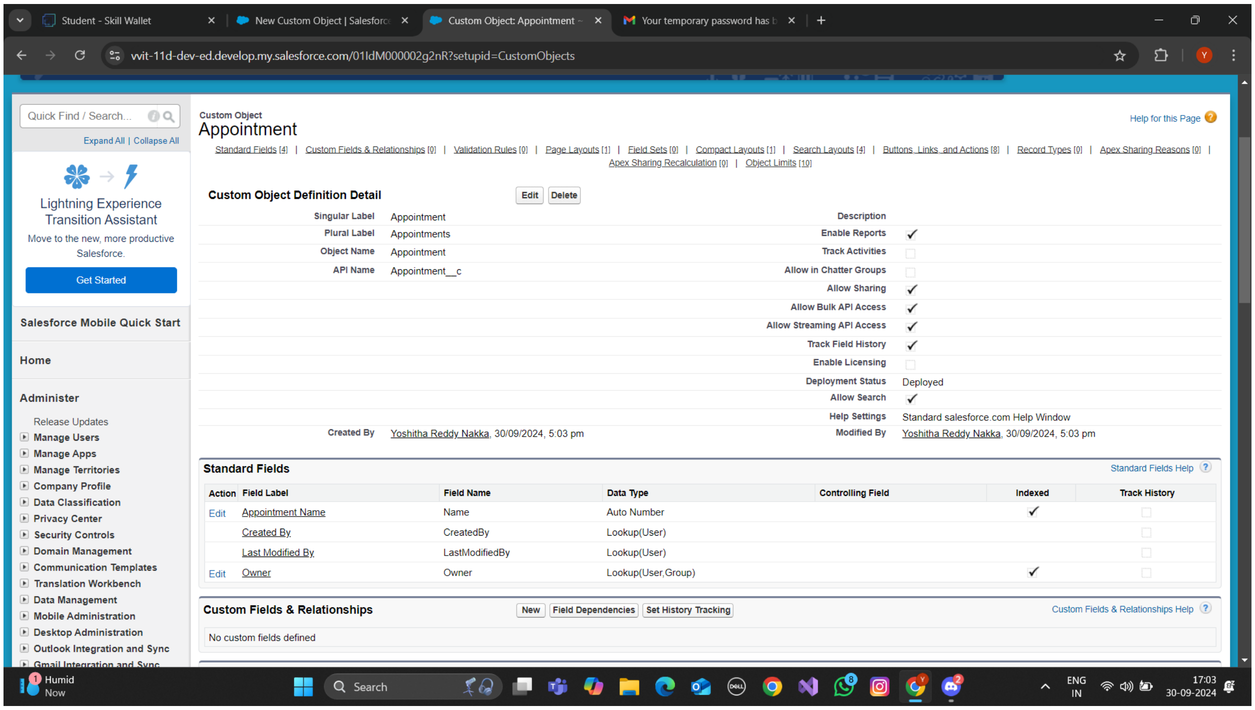
Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

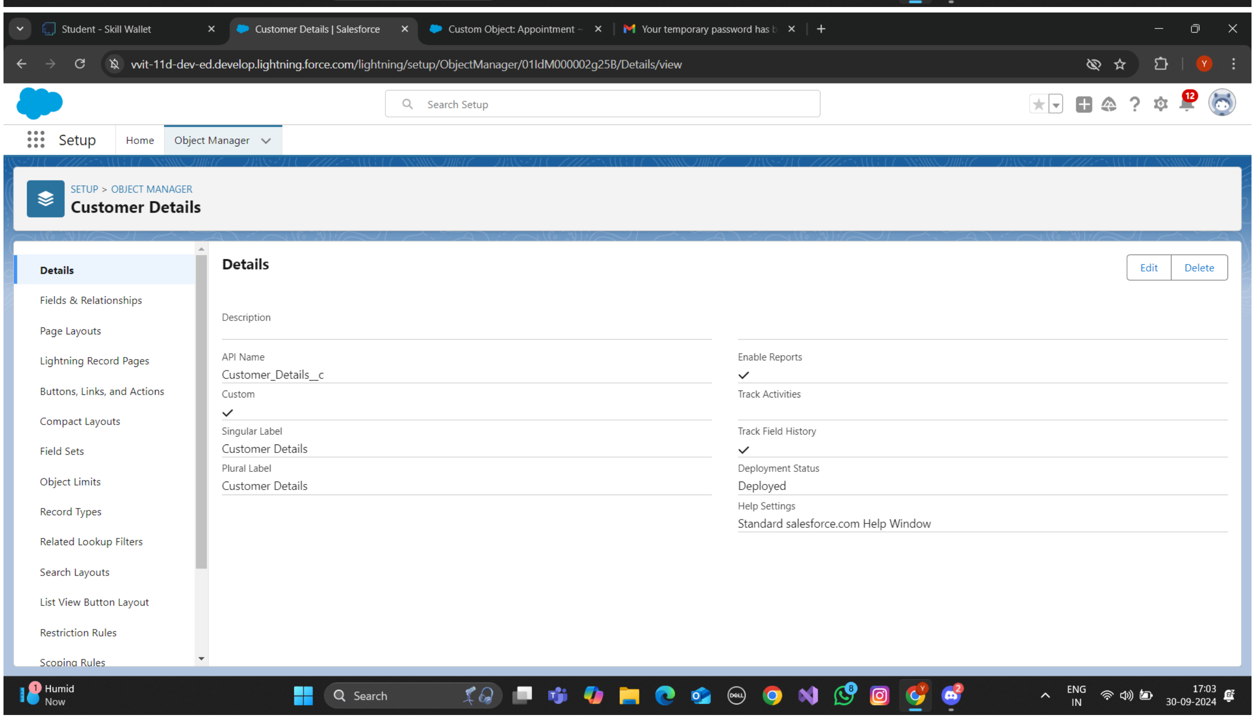
Creating and activation:

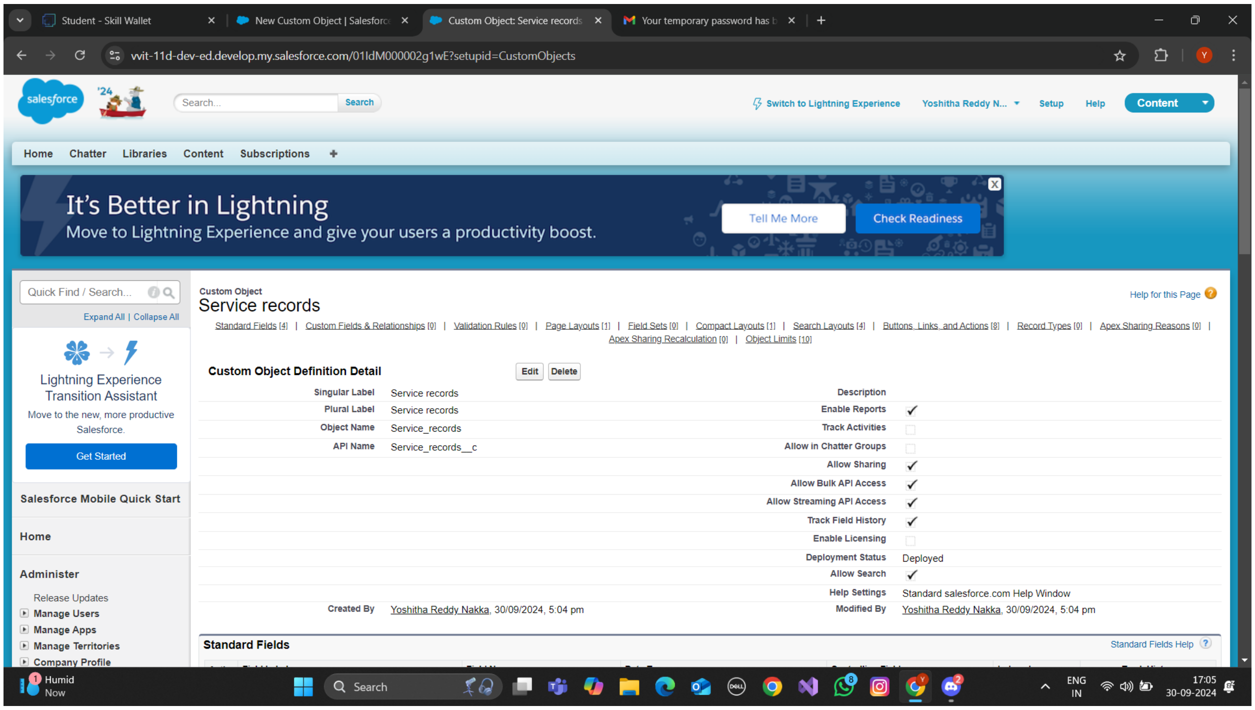


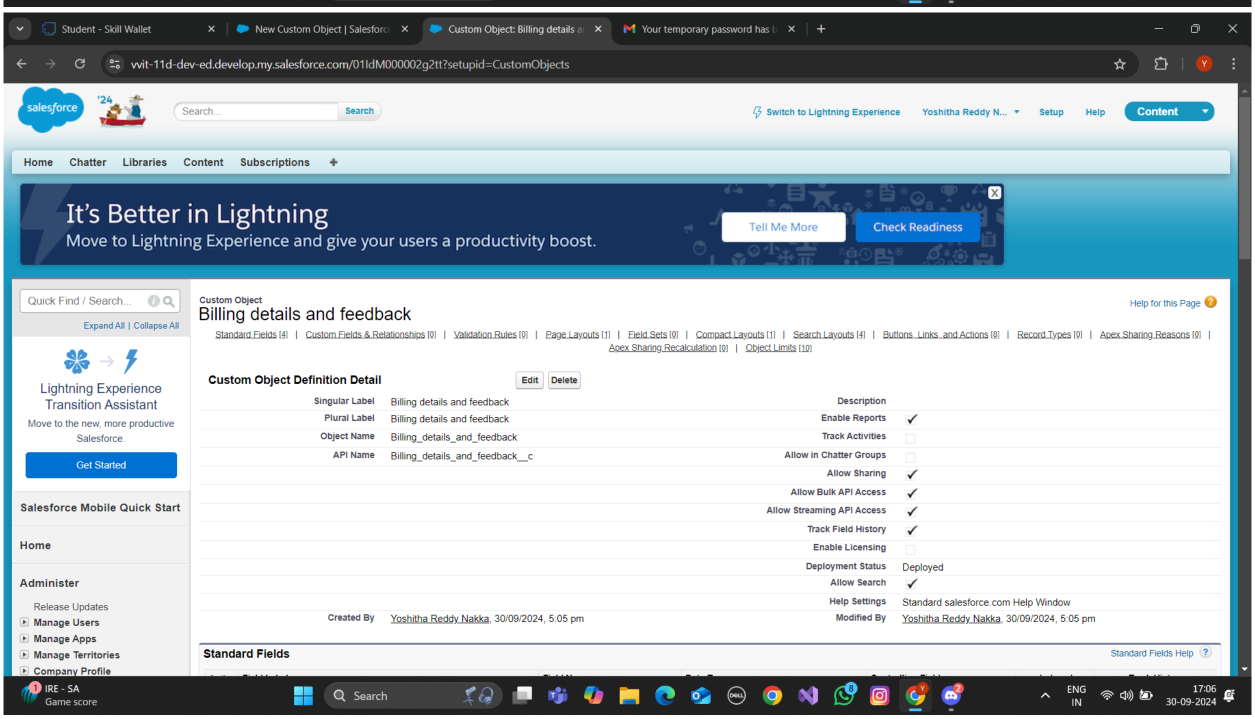
Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

creating customer object,appointment object,service records object,billing and feedback object

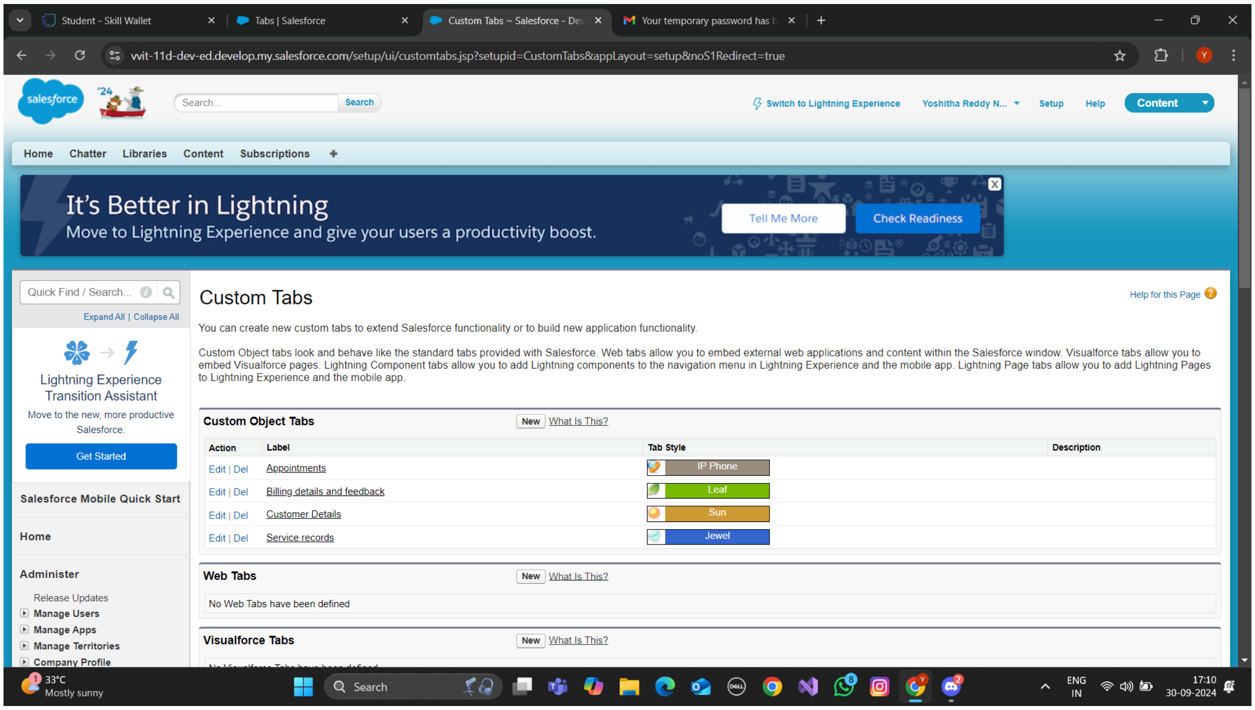

Student - Skill Wallet
New Custom Object | Salesforce
Custom Object: Appointment ~
Your temporary password has b
vvit-11d-dev-ed.develop.my.salesforce.com/01IdM000002g2nR?setupid=CustomObjects
Quick Find / Search...
Expand All | Collapse All
Lightning Experience Transition Assistant
Move to the new, more productive Salesforce.
Get Started
Salesforce Mobile Quick Start
Home
Administer
Release Updates
Manage Users
Manage Apps
Manage Territories
Company Profile
Data Classification
Privacy Center
Security Controls
Domain Management
Communication Templates
Translation Workbench
Data Management
Mobile Administration
Desktop Administration
Outlook Integration and Sync
Custom Object
Appointment
Help for this Page
Standard Fields [4] | Custom Fields & Relationships [0] | Validation Rules [0] | Page Layouts [1] | Field Sets [0] | Compact Layouts [1] | Search Layouts [4] | Buttons, Links, and Actions [8] | Record Types [0] | Apex Sharing Reasons [0] | Apex Sharing Recalculation [0] | Object Limits [10]
Custom Object Definition Detail
Edit
Delete
Singular Label Appointment
Plural Label Appointments
Object Name Appointment
API Name Appointment__c
Description
Enable Reports
Track Activities
Allow in Chatter Groups
Allow Sharing
Allow Bulk API Access
Allow Streaming API Access
Track Field History
Enable Licensing
Deployment Status Deployed
Allow Search
Help Settings Standard salesforce.com Help Window
Created By Yoshitha Reddy Nakka, 30/09/2024, 5:03 pm
Modified By Yoshitha Reddy Nakka, 30/09/2024, 5:03 pm
Standard Fields
Standard Fields Help
Action Field Label Field Name Data Type Controlling Field Indexed Track History
Edit Appointment Name Name Auto Number
Created By CreatedBy Lookup(User)
Last Modified By LastModifiedBy Lookup(User)
Edit Owner Owner Lookup(User,Group)
Custom Fields & Relationships
New
Field Dependencies
Set History Tracking
Custom Fields & Relationships Help
No custom fields defined
Humid
Now
Search
ENG
IN
17:03
30-09-2024


Student - Skill Wallet
Customer Details | Salesforce
Custom Object: Appointment ~
Your temporary password has b
vvit-11d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdM000002g25B/Details/view
Search Setup
Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Customer Details
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Details
Edit
Delete
Description
API Name
Customer_Details__c
Custom
Singular Label
Customer Details
Plural Label
Customer Details
Enable Reports
Track Activities
Track Field History
Deployment Status
Deployed
Help Settings
Standard salesforce.com Help Window
Humid
Now
Search
ENG
IN
17:03
30-09-2024





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

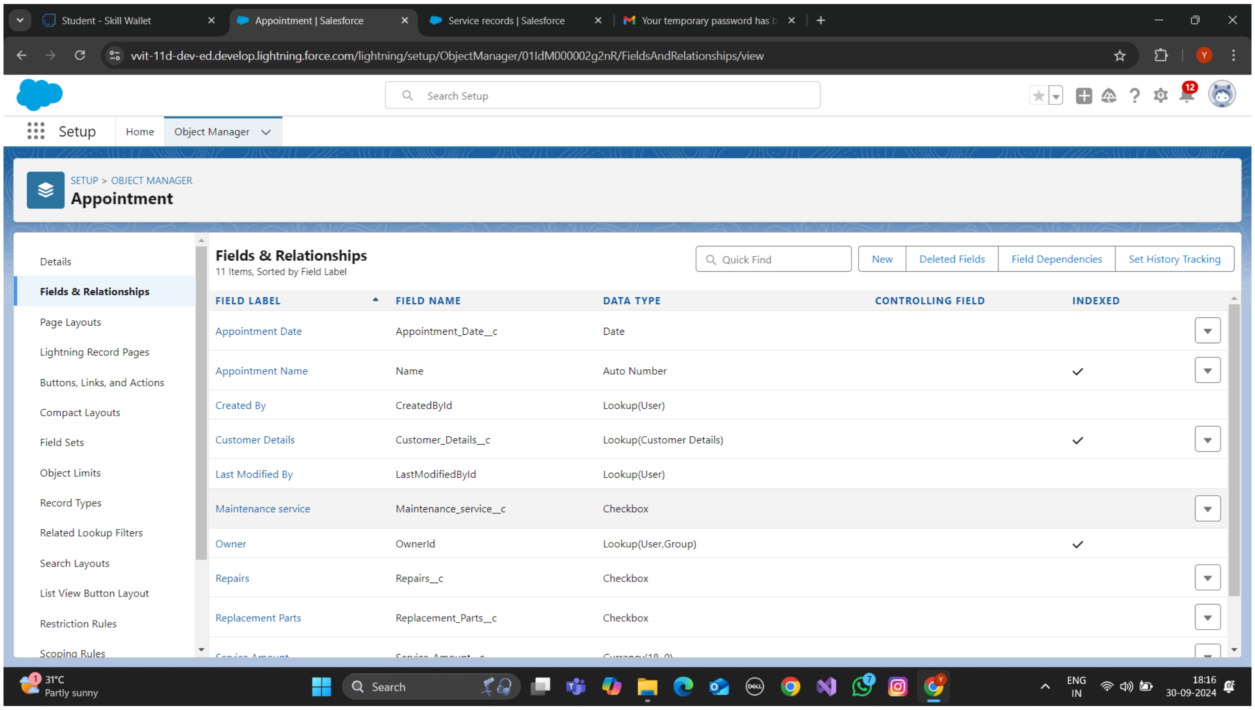


The Lightning App

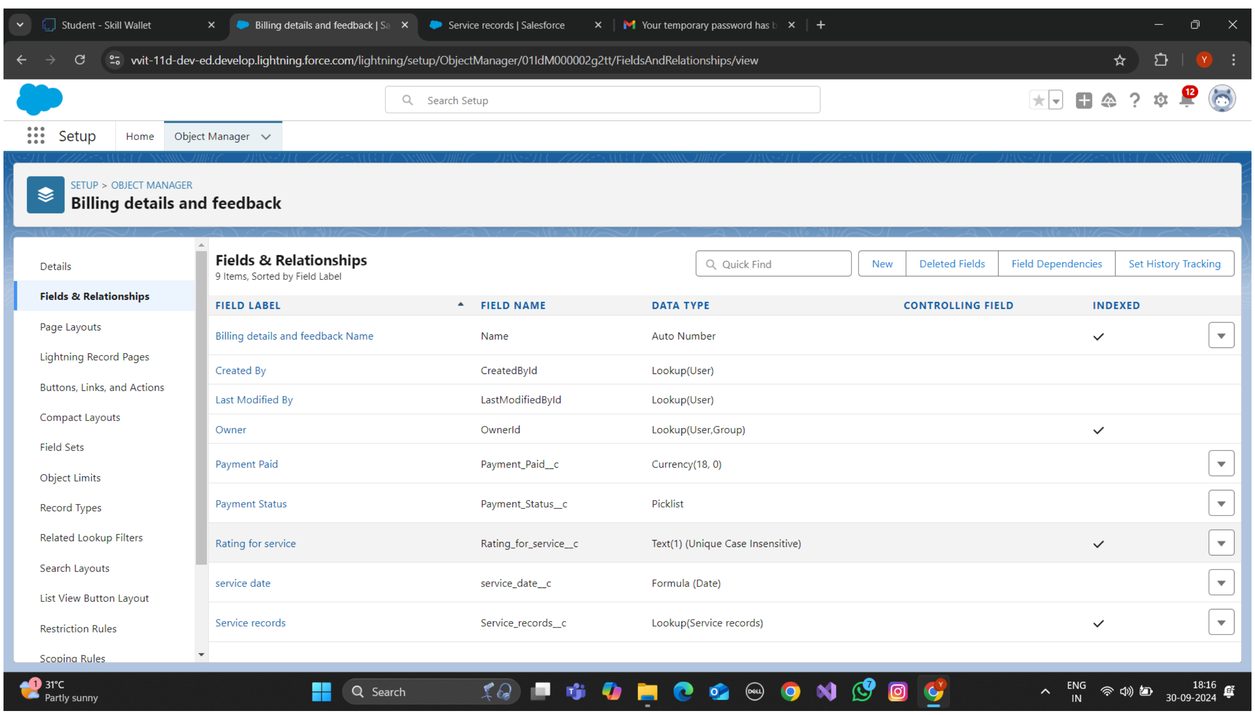
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.
Lightning apps let you brand your apps with a custom colour and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

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

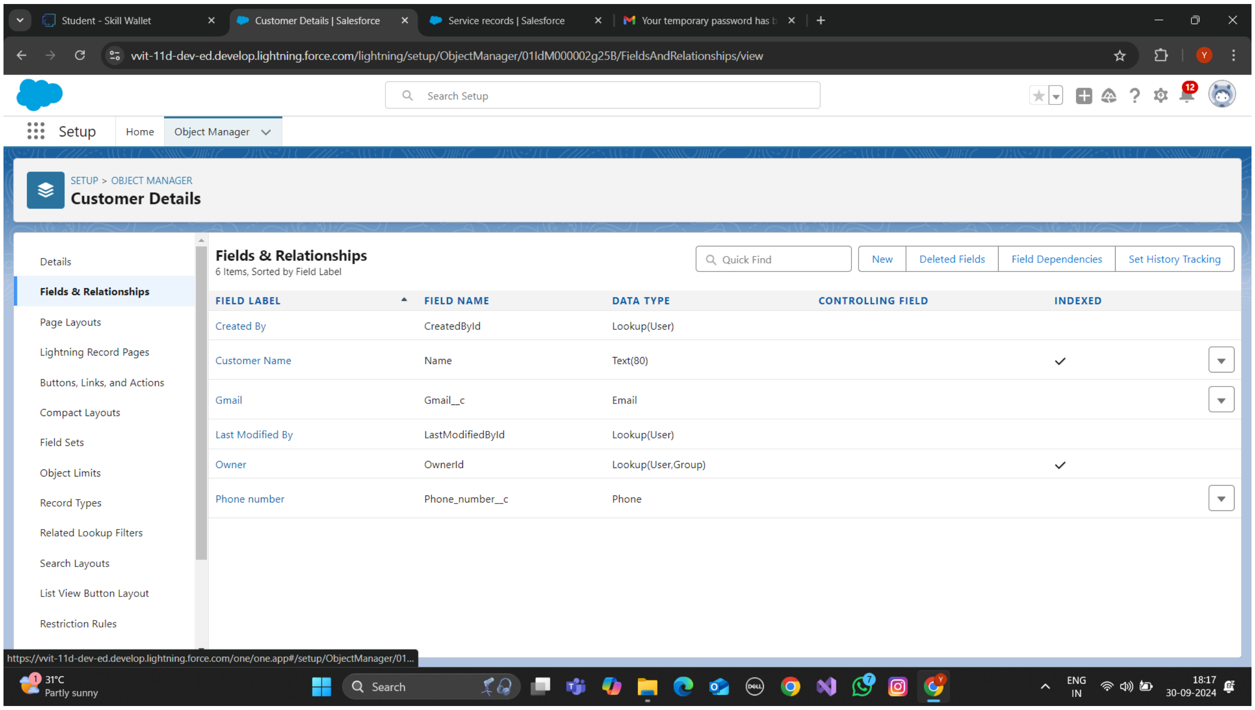
1. Standard Fields
2. Custom Fields

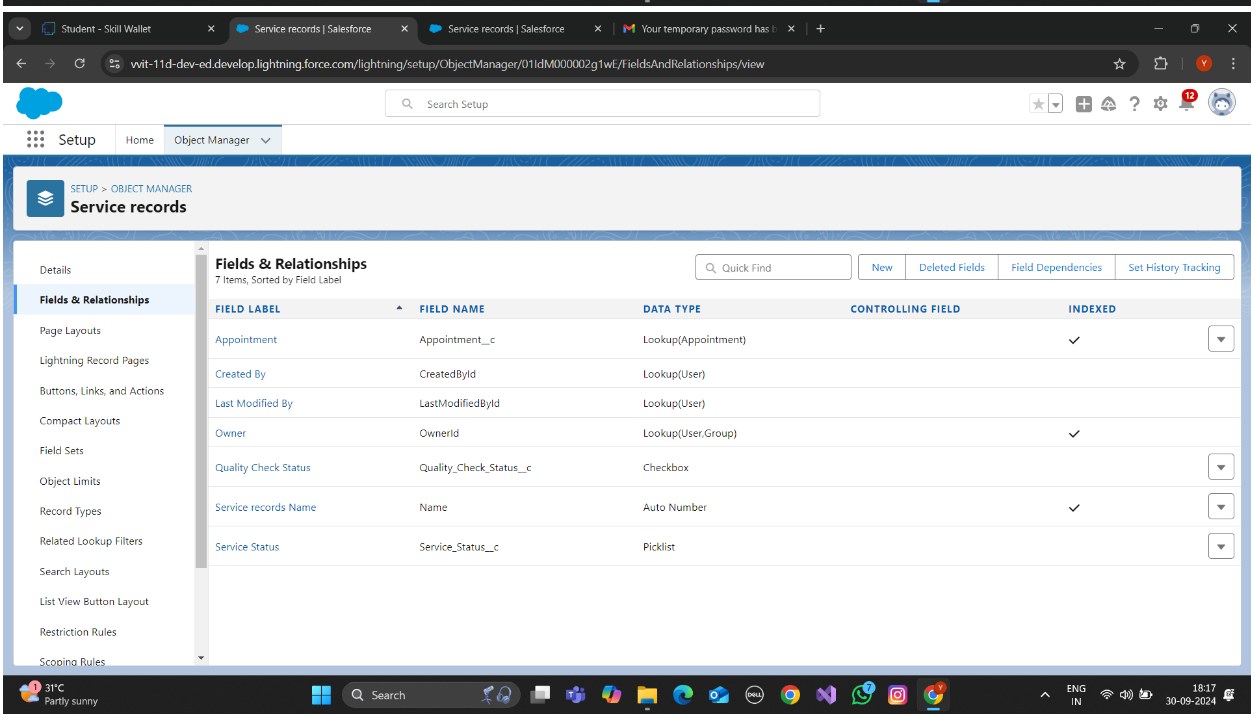


FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment Date	Appointment_Date__c	Date		
Appointment Name	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Customer Details	Customer_Details__c	Lookup(Customer Details)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Maintenance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

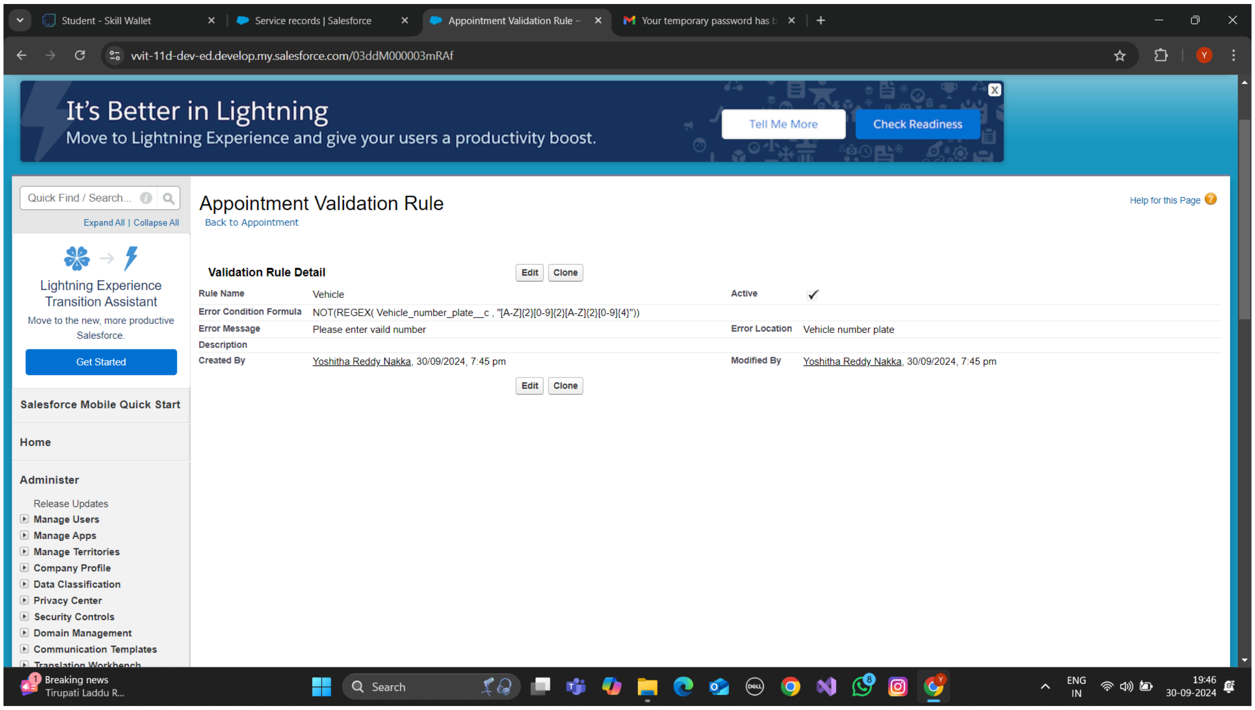


FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Billing details and feedback Name	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Payment Paid	Payment_Paid__c	Currency(18, 0)		
Payment Status	Payment_Status__c	Picklist		
Rating for service	Rating_for_service__c	Text(1) (Unique Case Insensitive)		✓
service date	service_date__c	Formula (Date)		
Service records	Service_records__c	Lookup(Service records)		✓

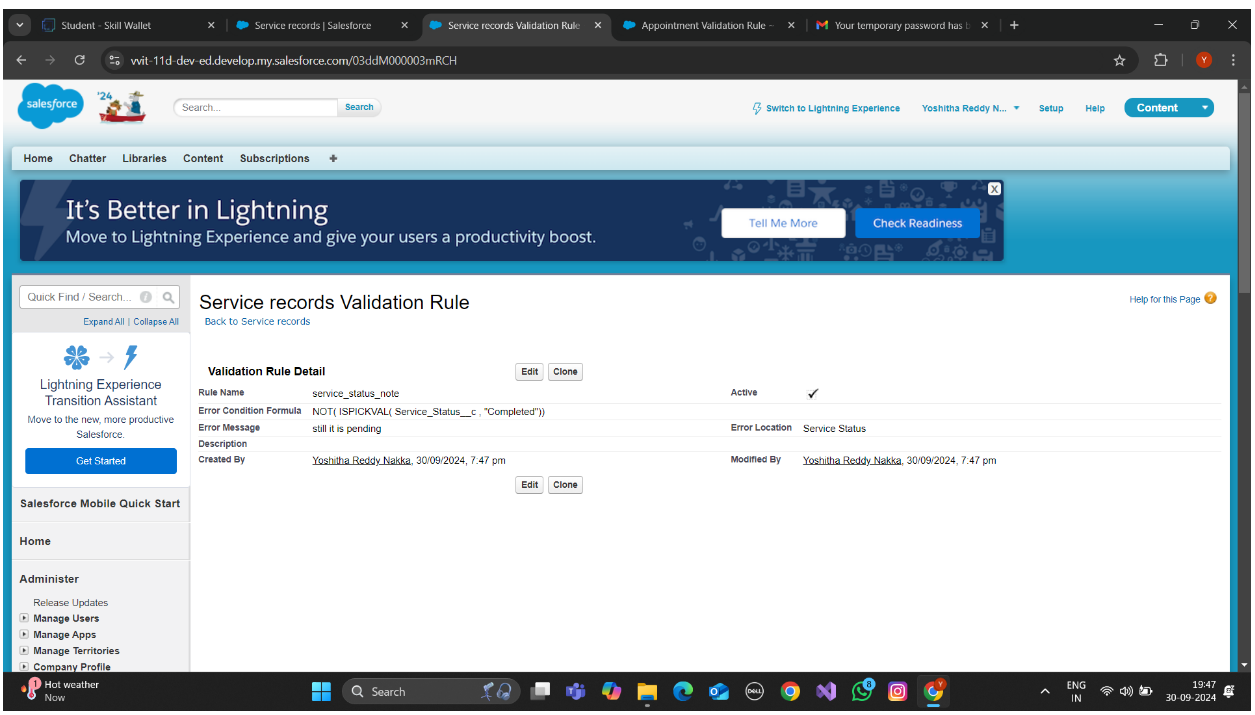




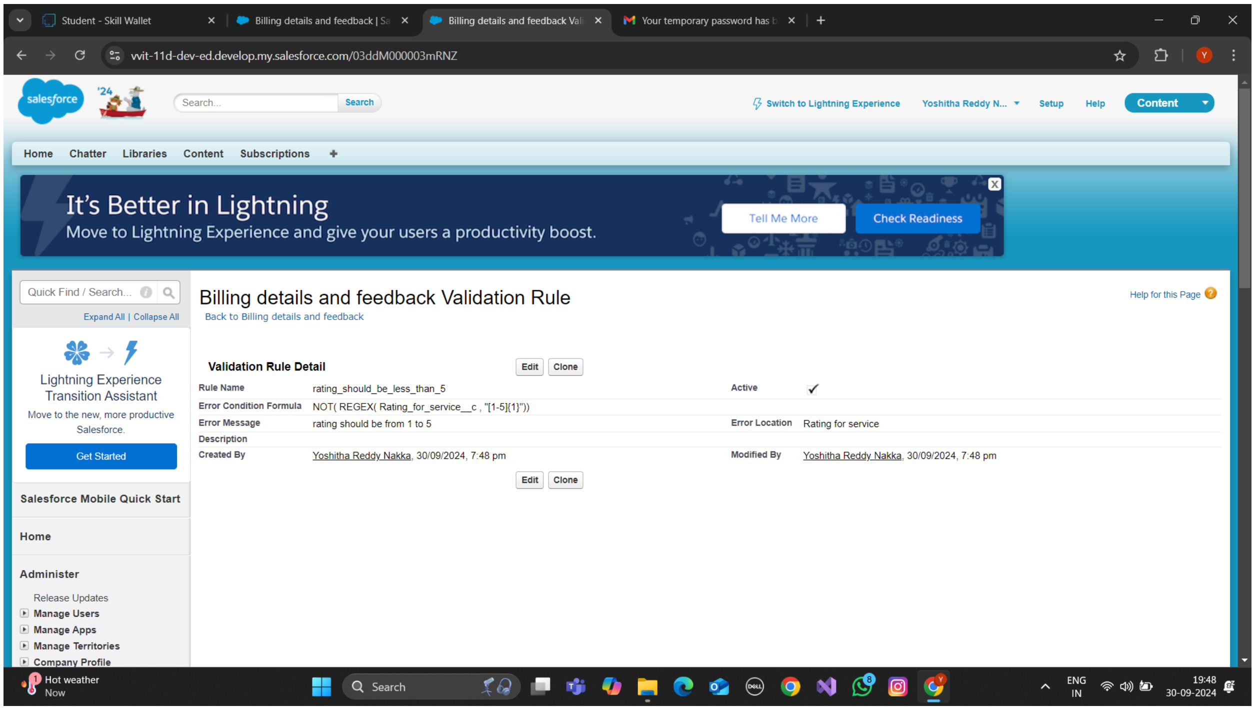
Validation rules are applied when a user tries to save a record and are used to check if the data meets specified criteria. If the criteria are not met, the validation rule triggers an error message and prevents the user from saving the record until the issues are resolved.



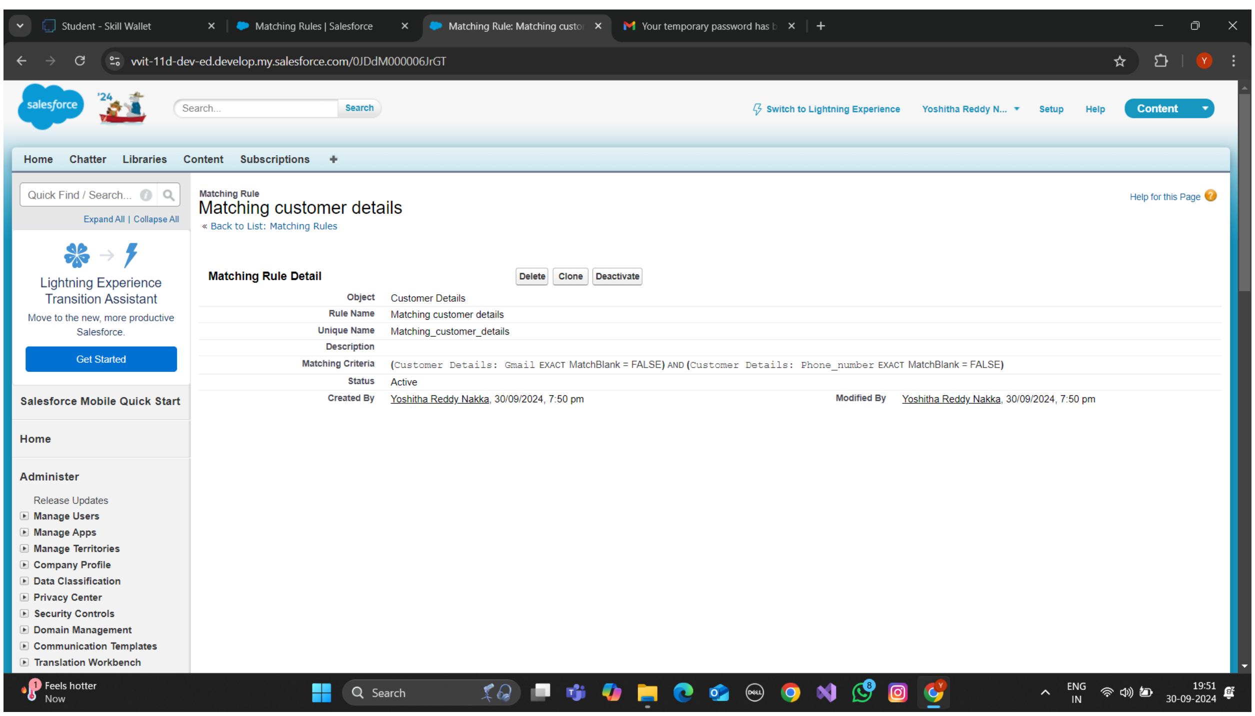
Student - Skill Wallet
Service records | Salesforce
Appointment Validation Rule ~
Your temporary password has b
vvit-11d-dev-ed.develop.my.salesforce.com/03ddM000003mRAf
It's Better in Lightning
Move to Lightning Experience and give your users a productivity boost.
Tell Me More
Check Readiness
Quick Find / Search...
Expand All | Collapse All
Lightning Experience Transition Assistant
Move to the new, more productive Salesforce.
Get Started
Salesforce Mobile Quick Start
Home
Administer
Release Updates
Manage Users
Manage Apps
Manage Territories
Company Profile
Data Classification
Privacy Center
Security Controls
Domain Management
Communication Templates
Appointment Validation Rule
Back to Appointment
Help for this Page
Validation Rule Detail
Edit
Clone
Rule Name
Vehicle
Active
Error Condition Formula
NOT(REGEX(Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))
Error Message
Please enter vaild number
Error Location
Vehicle number plate
Description
Created By
Yoshitha Reddy Nakka, 30/09/2024, 7:45 pm
Modified By
Yoshitha Reddy Nakka, 30/09/2024, 7:45 pm
Breaking news
Tirupati Laddu R...
Search
ENG
IN
19:46
30-09-2024

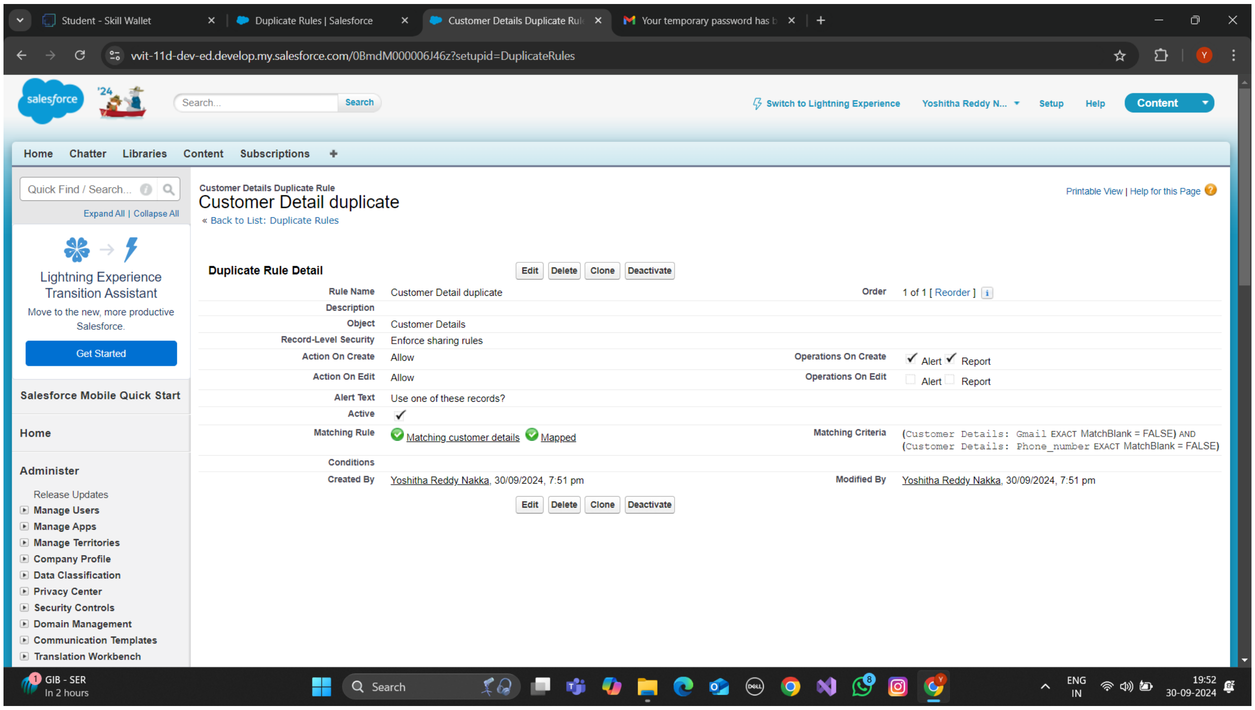


Student - Skill Wallet
Service records | Salesforce
Service records Validation Rule
Appointment Validation Rule ~
Your temporary password has b
vvit-11d-dev-ed.develop.my.salesforce.com/03ddM000003mRCH
Search...
Search
Switch to Lightning Experience
Yoshitha Reddy N...
Setup
Help
Content
Home
Chatter
Libraries
Content
Subscriptions
It's Better in Lightning
Move to Lightning Experience and give your users a productivity boost.
Tell Me More
Check Readiness
Quick Find / Search...
Expand All | Collapse All
Lightning Experience Transition Assistant
Move to the new, more productive Salesforce.
Get Started
Salesforce Mobile Quick Start
Home
Administer
Release Updates
Manage Users
Manage Apps
Manage Territories
Company Profile
Service records Validation Rule
Back to Service records
Help for this Page
Validation Rule Detail
Edit
Clone
Rule Name
service_status_note
Active
Error Condition Formula
NOT(ISPICKVAL(Service_Status__c , "Completed"))
Error Message
still it is pending
Error Location
Service Status
Description
Created By
Yoshitha Reddy Nakka, 30/09/2024, 7:47 pm
Modified By
Yoshitha Reddy Nakka, 30/09/2024, 7:47 pm
Hot weather
Now
Search
ENG
IN
19:47
30-09-2024



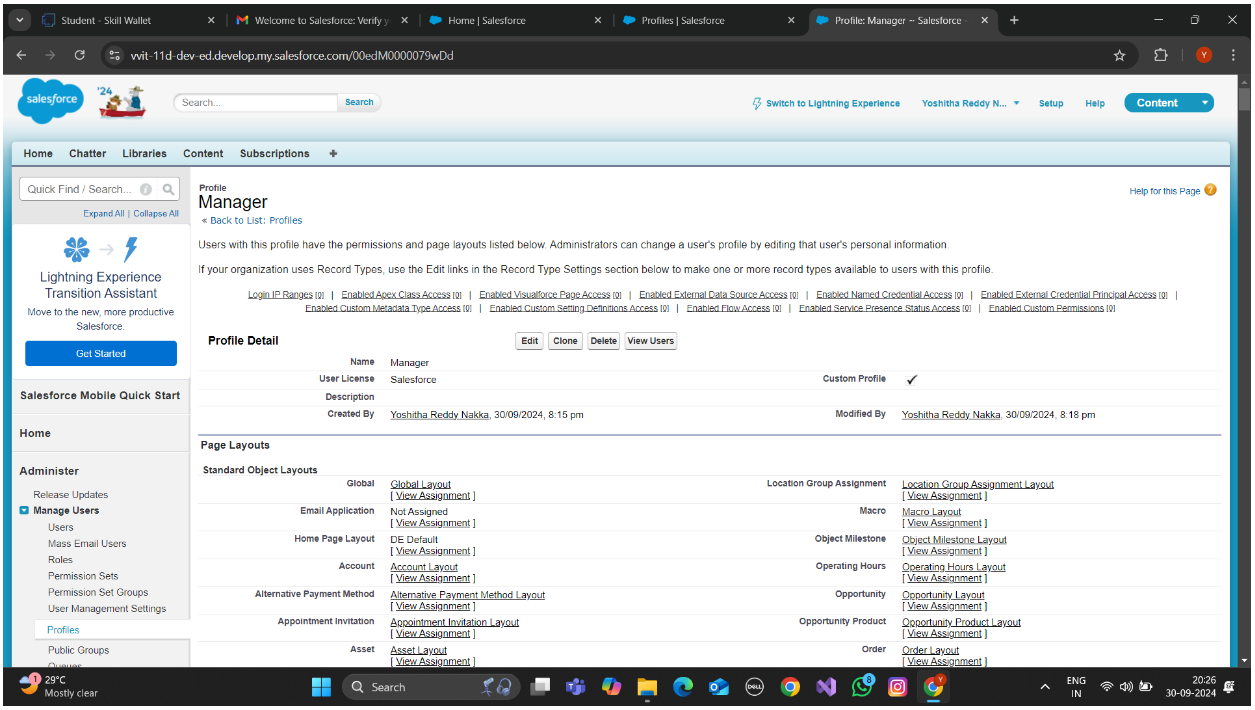
Duplicate rule

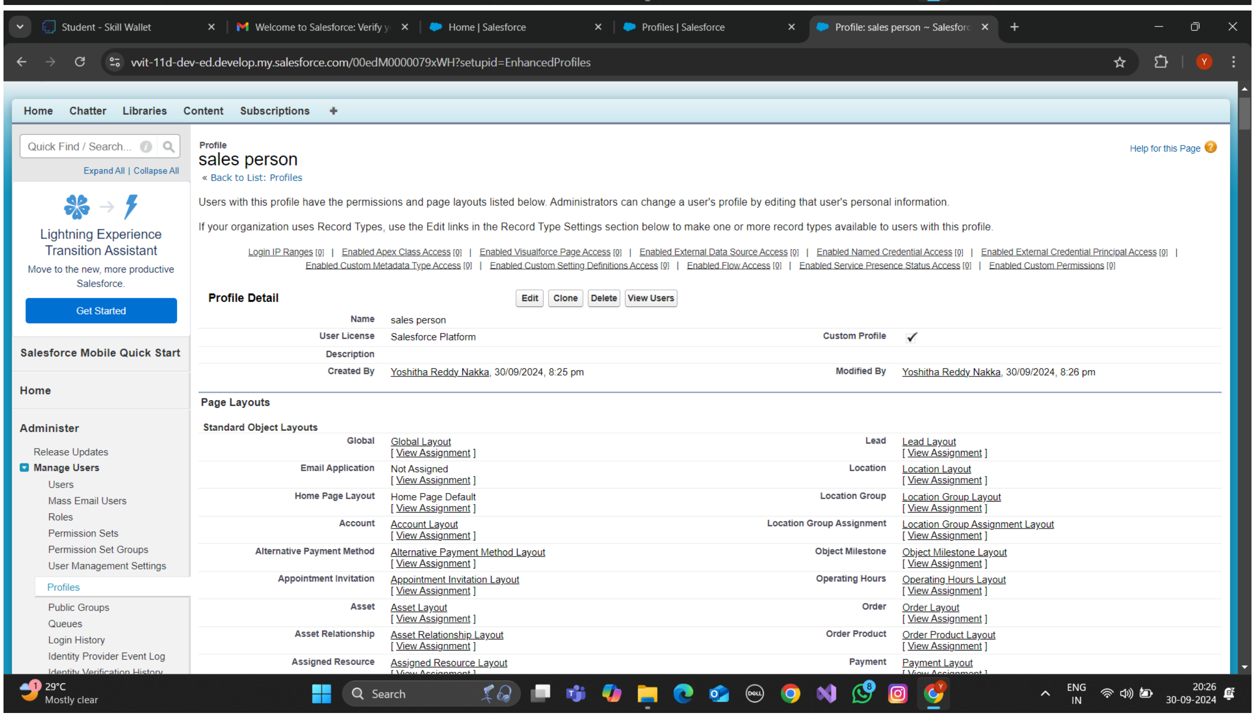




Profiles

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.



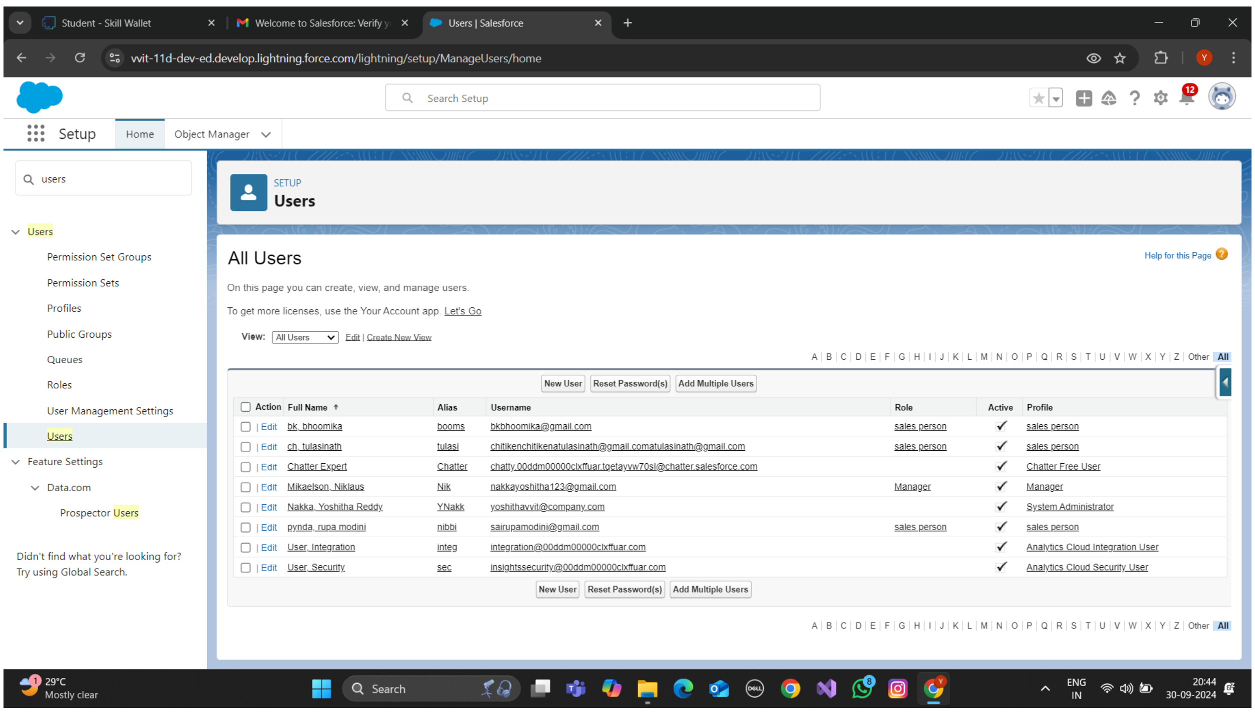


Role & Role Hierarchy

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.

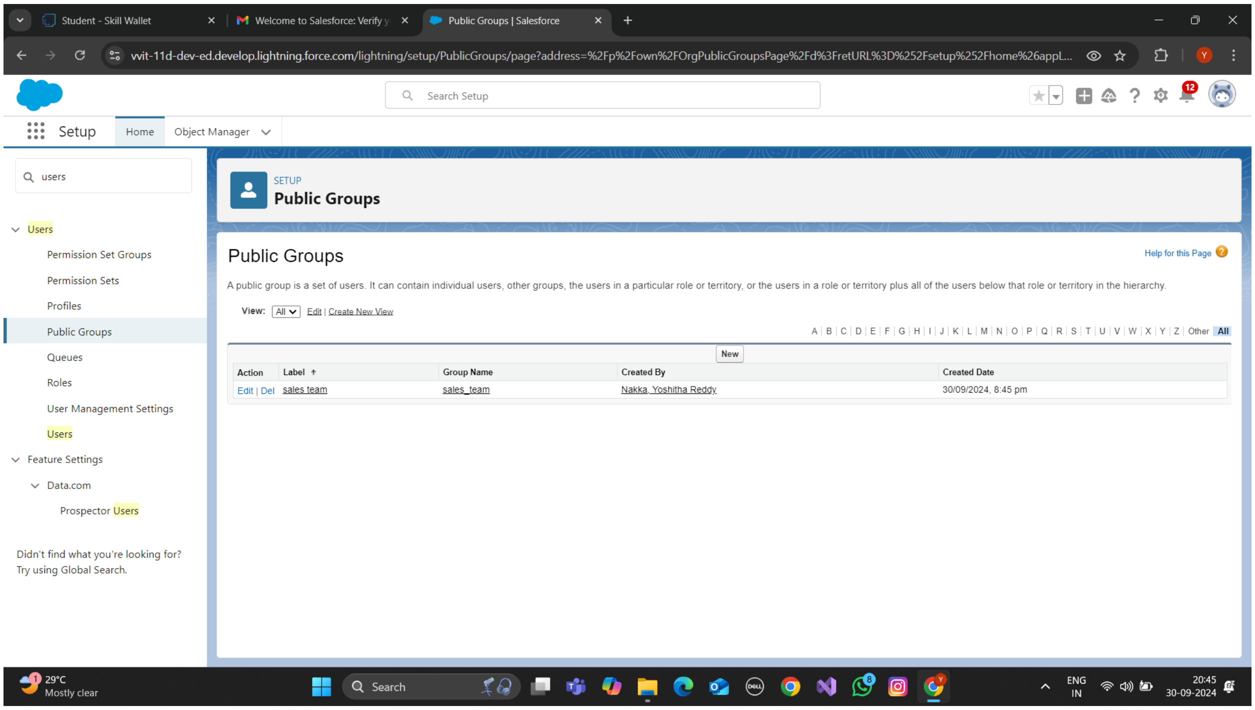
Users

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.



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.

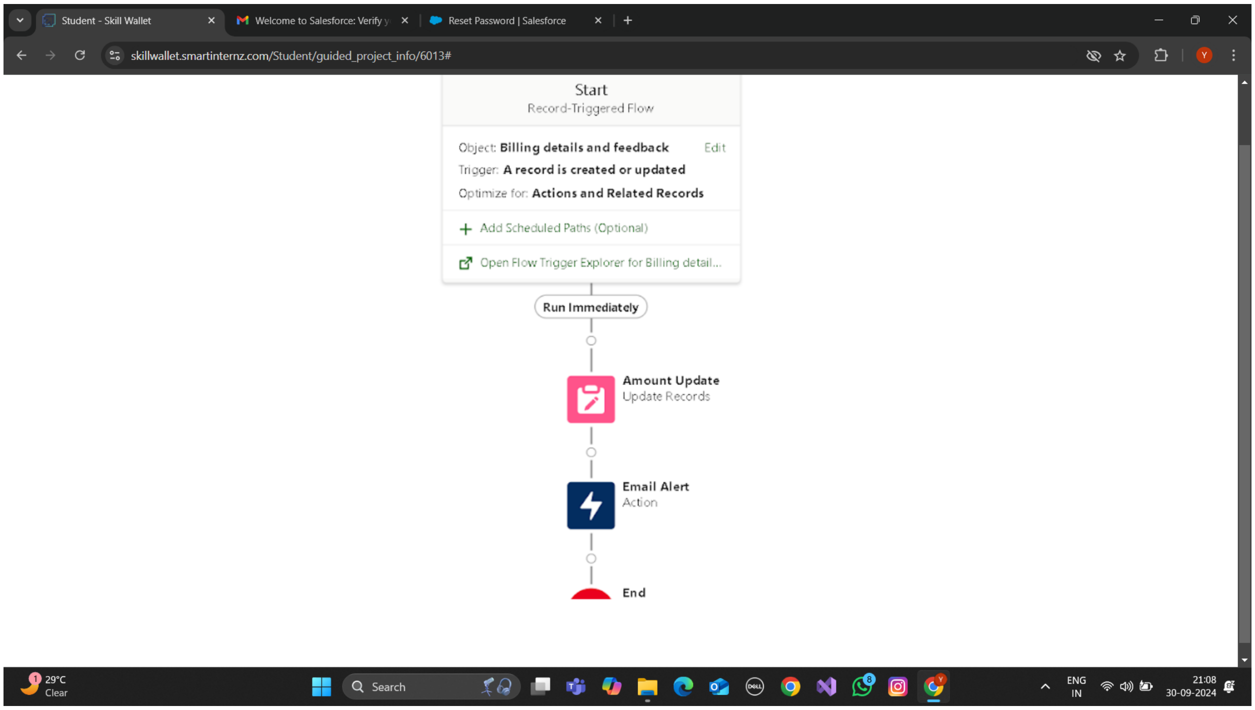


Sharing Setting

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.

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.

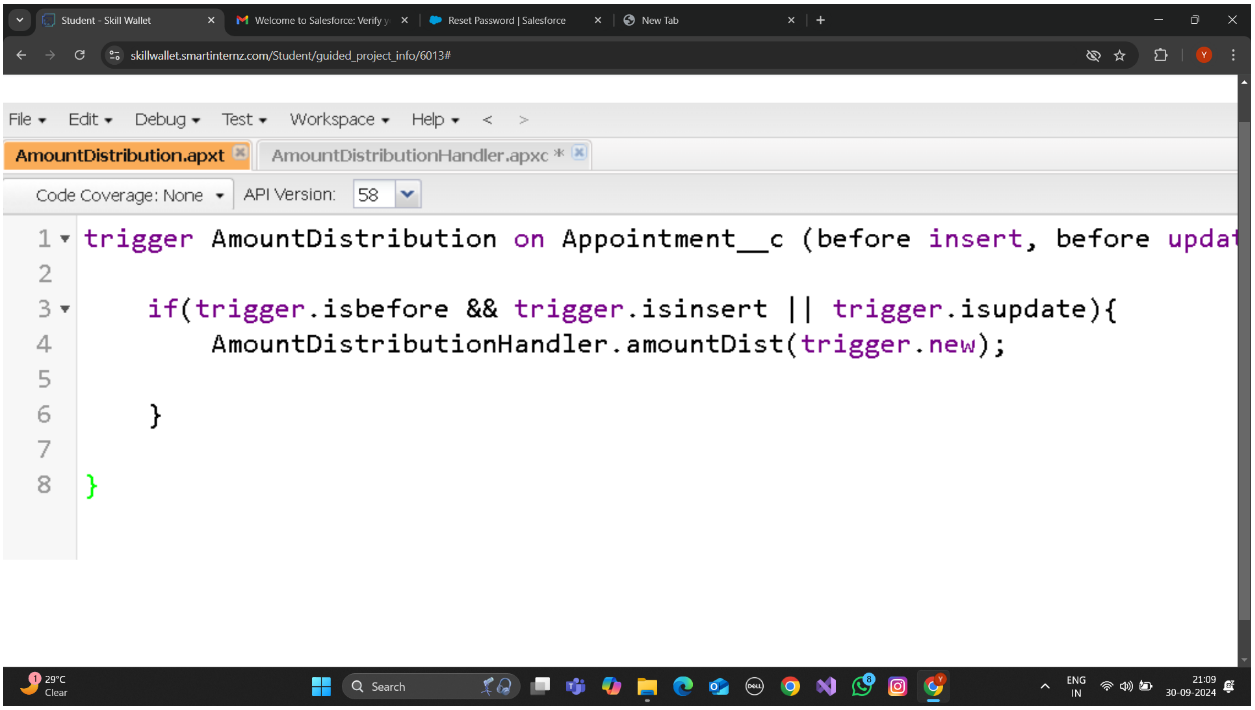


Apex Trigger

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



Reports

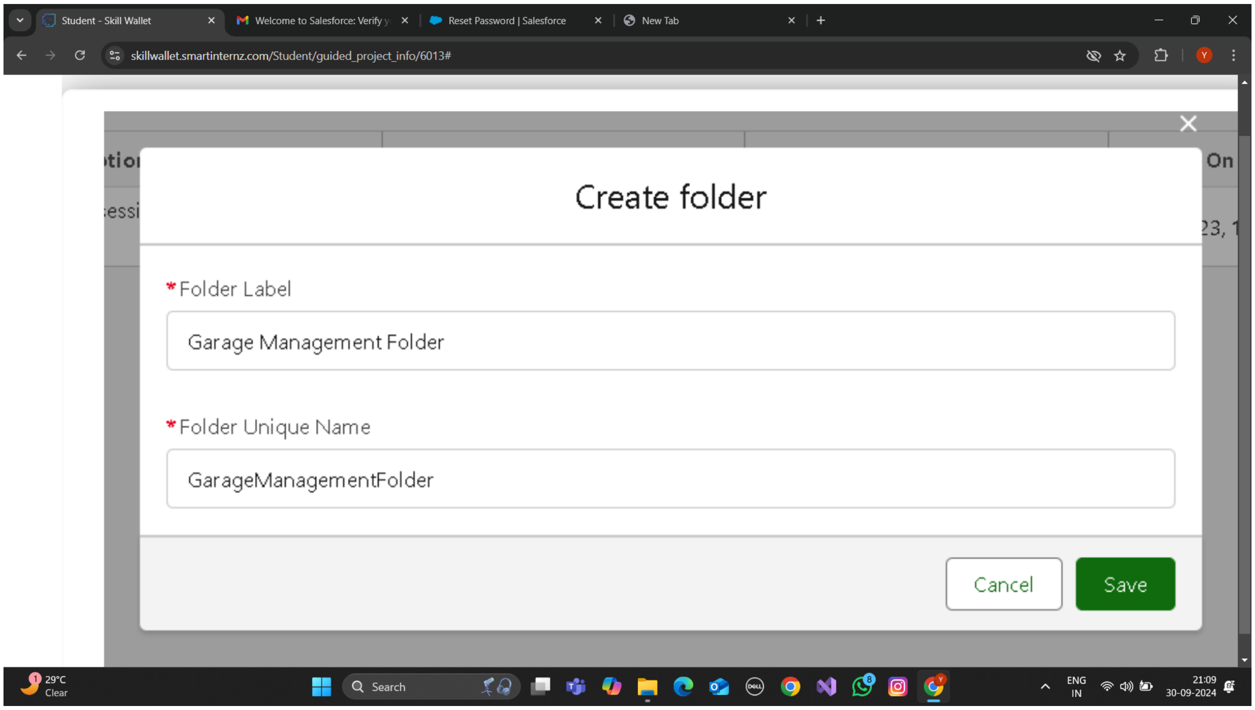
Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

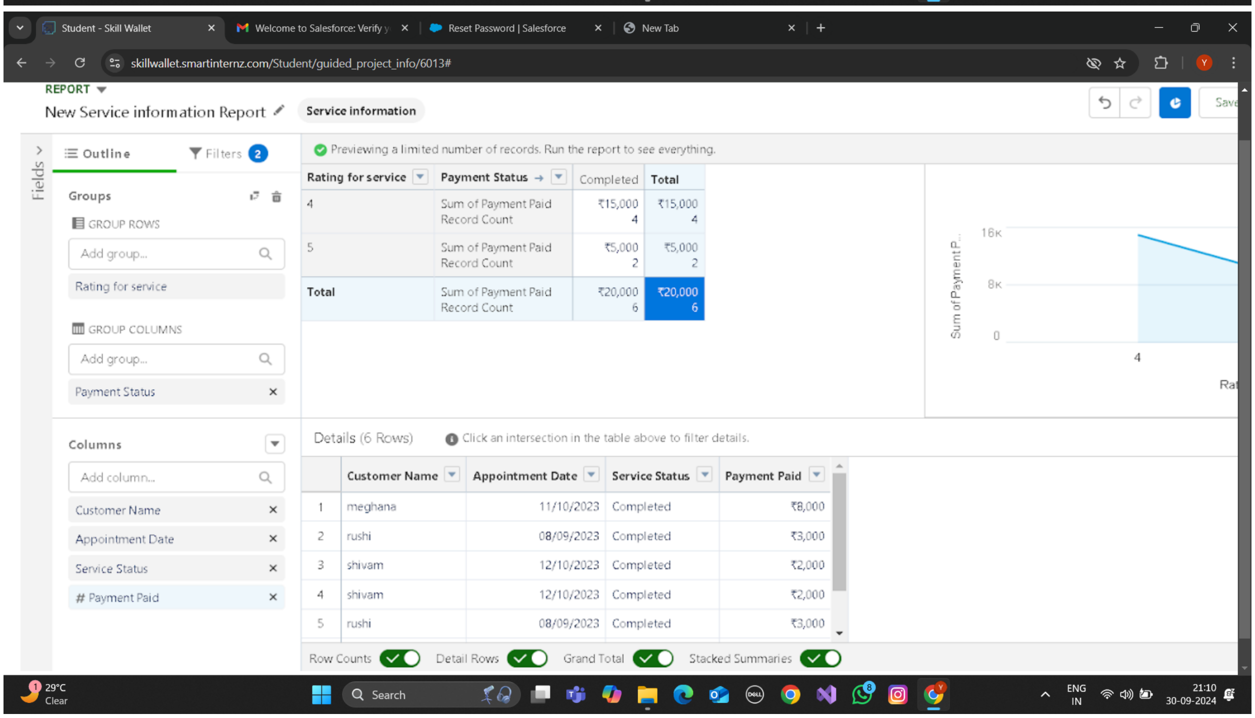
Types of Reports in Salesforce

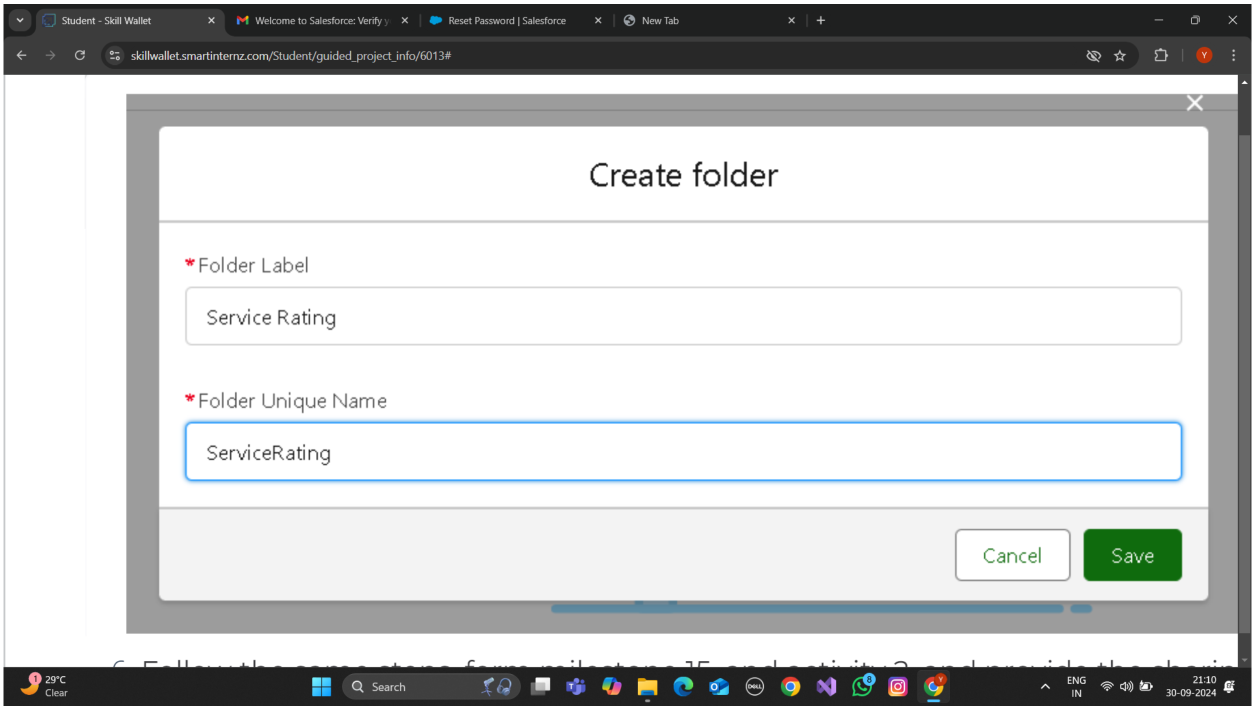
1. Tabular
2. Summary
3. Matrix
4. Joined Reports

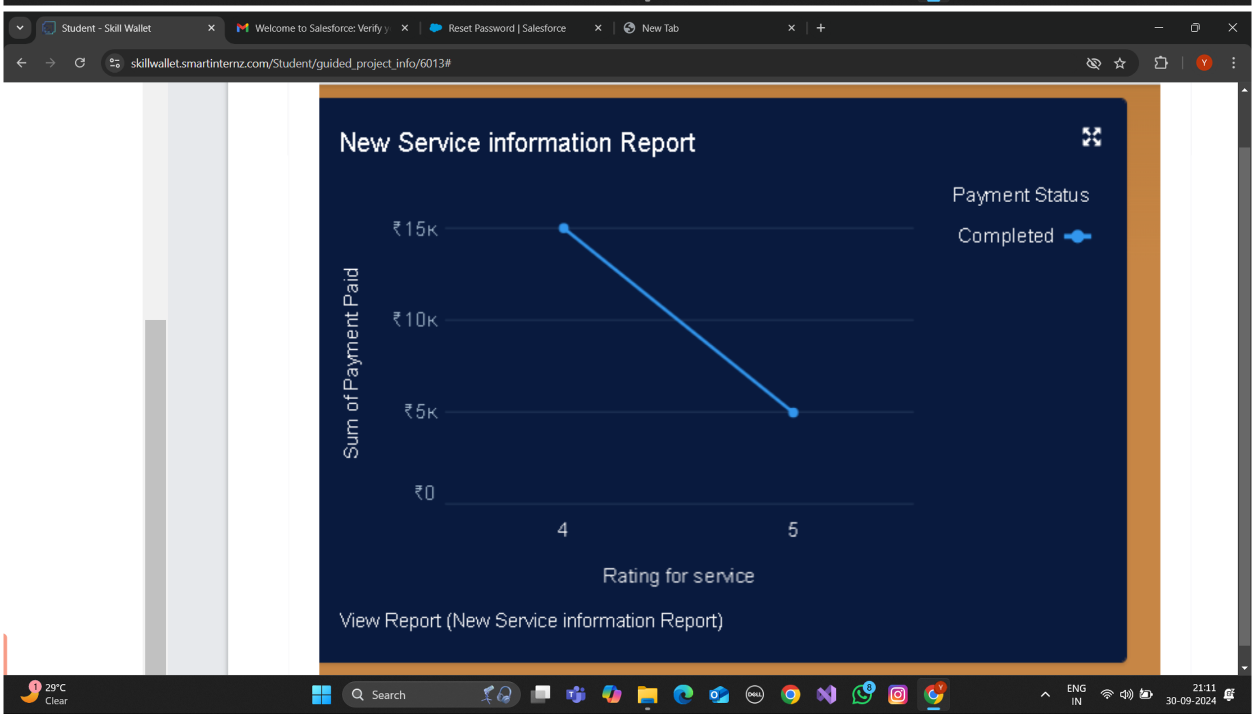
Dashboards

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.


Student - Skill Wallet
Welcome to Salesforce: Verify y
Reset Password | Salesforce
New Tab
skillwallet.smartinternz.com/Student/guided_project_info/6013#
Create folder
*Folder Label
Garage Management Folder
*Folder Unique Name
GarageManagementFolder
Cancel
Save
29°C
Clear
Search
ENG
IN
21:09
30-09-2024


Student - Skill Wallet
Welcome to Salesforce: Verify y
Reset Password | Salesforce
New Tab
skillwallet.smartinternz.com/Student/guided_project_info/6013#
REPORT
New Service information Report
Service information
Fields
Outline
Filters 2
Groups
GROUP ROWS
Add group...
Rating for service
GROUP COLUMNS
Add group...
Payment Status
Columns
Add column...
Customer Name
Appointment Date
Service Status
Payment Paid
Previewing a limited number of records. Run the report to see everything.
Rating for service
Payment Status
Completed
Total
4
Sum of Payment Paid
Record Count
₹15,000
4
₹15,000
4
5
Sum of Payment Paid
Record Count
₹5,000
2
₹5,000
2
Total
Sum of Payment Paid
Record Count
₹20,000
6
₹20,000
6
Sum of Payment P...
16K
8K
0
4
Details (6 Rows)
Click an intersection in the table above to filter details.
Customer Name
Appointment Date
Service Status
Payment Paid
1 meghana 11/10/2023 Completed ₹8,000
2 rushi 08/09/2023 Completed ₹3,000
3 shivam 12/10/2023 Completed ₹2,000
4 shivam 12/10/2023 Completed ₹2,000
5 rushi 08/09/2023 Completed ₹3,000
Row Counts
Detail Rows
Grand Total
Stacked Summaries
29°C
Clear
Search
ENG
IN
21:10
30-09-2024


Student - Skill Wallet
Welcome to Salesforce: Verify y
Reset Password | Salesforce
New Tab
skillwallet.smartinternz.com/Student/guided_project_info/6013#
Create folder
*Folder Label
Service Rating
*Folder Unique Name
ServiceRating
Cancel
Save
29°C
Clear
Search
ENG
IN
21:10
30-09-2024


Student - Skill Wallet
Welcome to Salesforce: Verify y
Reset Password | Salesforce
New Tab
skillwallet.smartinternz.com/Student/guided_project_info/6013#
New Service information Report
Payment Status
Completed
₹15K
₹10K
₹5K
₹0
Sum of Payment Paid
4
5
Rating for service
View Report (New Service information Report)
29°C
Clear
Search
ENG
IN
21:11
30-09-2024