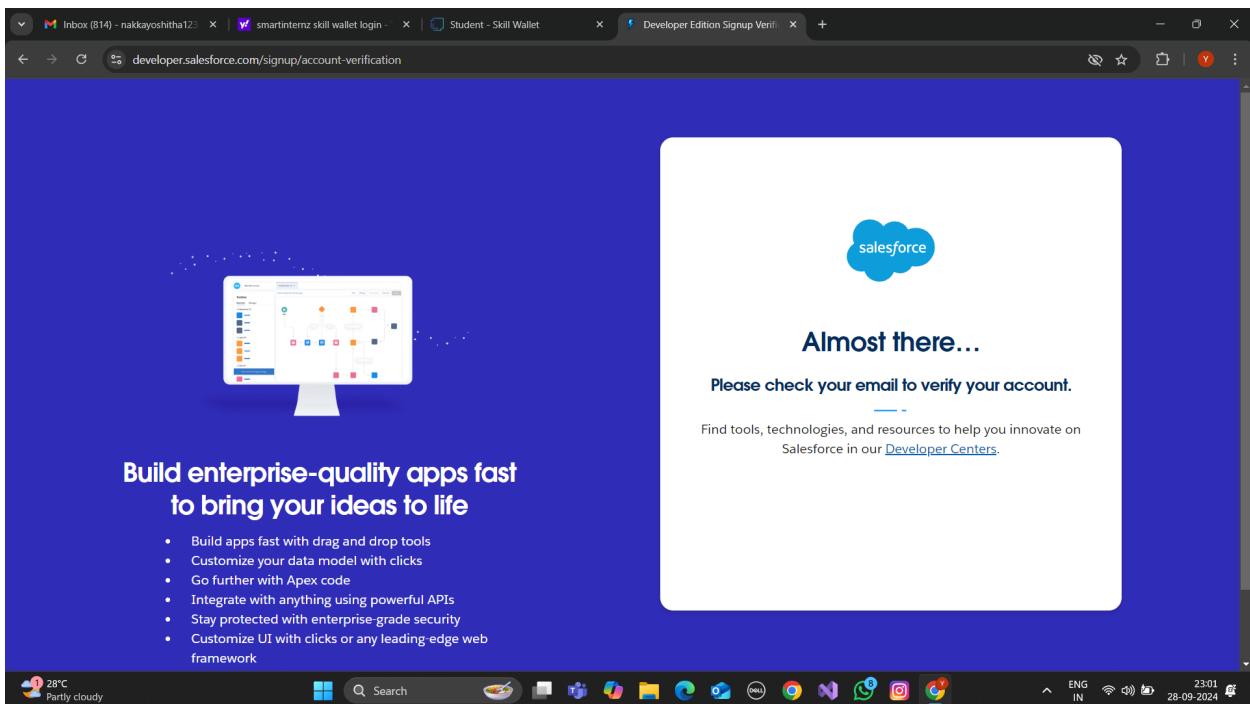


Salesforce login:

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 been sent to your email.

vvit-11d-dev-ed.develop.my.salesforce.com/01dM00000g2nR?setupid=CustomObjects

Custom Object

Appointment

Custom Object Definition Detail

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed	Track History
Edit	Appointment Name	Name	Auto Number		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Edit	Created By	CreatedBy	Lookup(User)		<input type="checkbox"/>	<input type="checkbox"/>
Edit	Last Modified By	LastModifiedBy	Lookup(User)		<input type="checkbox"/>	<input type="checkbox"/>
Edit	Owner	Owner	Lookup(User,Group)		<input checked="" type="checkbox"/>	<input type="checkbox"/>

Standard Fields

Custom Fields & Relationships

Help for this Page

Lightning Experience Transition Assistant

Get Started

Salesforce Mobile Quick Start

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- Data Classification
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- Security Controls
- Domain Management
- Communication Templates
- Translation Workbench
- Data Management
- Mobile Administration
- Desktop Administration
- Outlook Integration and Sync
- Gmail Integration and Sync

Humid Now

ENG IN 17:03 30-09-2024

Student - Skill Wallet

Customer Details | Salesforce

Custom Object: Appointment

Your temporary password has been sent to your email.

vvit-11d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01dM00000g25B/Details/view

Setup

Object Manager

Customer Details

SETUP > OBJECT MANAGER

Customer Details

Details

Description	API Name	Enable Reports	Track Activities
	Customer_Details__c	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Custom		<input type="checkbox"/>	<input type="checkbox"/>
Singular Label	Customer Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Plural Label	Customer Details	<input type="checkbox"/>	<input type="checkbox"/>

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

Humid Now

ENG IN 17:03 30-09-2024

The screenshot shows the Salesforce Classic interface. At the top, there are three tabs: 'Student - Skill Wallet', 'New Custom Object | Salesforce', and 'Custom Object: Service records'. The current tab is 'Custom Object: Service records'. The URL in the address bar is 'vwit-11d-dev-ed.develop.my.salesforce.com/01lM000002g1wE?setupid=CustomObjects'. The page title is 'Custom Object Service records'. The main content area displays the 'Custom Object Definition Detail' for 'Service records'. It includes fields for Singular Label (Service records), Plural Label (Service records), Object Name (Service_records), and API Name (Service_records_c). On the right, there is a list of settings with checkboxes: Description (checked), Enable Reports (checked), Track Activities (unchecked), Allow in Chatter Groups (unchecked), Allow Sharing (checked), Allow Bulk API Access (checked), Allow Streaming API Access (checked), Track Field History (checked), Enable Licensing (unchecked), Deployment Status (Deployed), Allow Search (checked), and Help Settings (Standard salesforce.com Help Window). The status bar at the bottom shows 'ENG IN 30-09-2024 17:05'.

The screenshot shows the Salesforce Classic interface. At the top, there are three tabs: 'Student - Skill Wallet', 'New Custom Object | Salesforce', and 'Custom Object: Billing details and feedback'. The current tab is 'Custom Object: Billing details and feedback'. The URL in the address bar is 'vwit-11d-dev-ed.develop.my.salesforce.com/01lM000002g2tt?setupid=CustomObjects'. The page title is 'Custom Object Billing details and feedback'. The main content area displays the 'Custom Object Definition Detail' for 'Billing details and feedback'. It includes fields for Singular Label (Billing details and feedback), Plural Label (Billing details and feedback), Object Name (Billing_details_and_feedback), and API Name (Billing_details_and_feedback_c). On the right, there is a list of settings with checkboxes: Description (checked), Enable Reports (checked), Track Activities (unchecked), Allow in Chatter Groups (unchecked), Allow Sharing (checked), Allow Bulk API Access (checked), Allow Streaming API Access (checked), Track Field History (checked), Enable Licensing (unchecked), Deployment Status (Deployed), Allow Search (checked), and Help Settings (Standard salesforce.com Help Window). The status bar at the bottom shows 'ENG IN 30-09-2024 17:06'.

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 screenshot shows the Salesforce Lightning Experience interface. At the top, there are three tabs: 'Student - Skill Wallet', 'Tabs | Salesforce', and 'Custom Tabs ~ Salesforce - Dev'. The main content area has a banner that says 'It's Better in Lightning' and 'Move to Lightning Experience and give your users a productivity boost.' Below the banner, there is a section titled 'Custom Tabs' with a sub-section titled 'Custom Object Tabs'. A table lists four custom object tabs: 'Appointments' (Tab Style: IP Phone), 'Billing details and feedback' (Tab Style: Leaf), 'Customer Details' (Tab Style: Sun), and 'Service records' (Tab Style: Jewel). There are also sections for 'Web Tabs' and 'Visualforce Tabs', both of which currently have no items defined.

The Lightning App

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

Lightning apps let you brand your apps with a custom 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

Student - Skill Wallet Appointment | Salesforce Service records | Salesforce Your temporary password has b vvit-11d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01dM000002g2nV/FieldsAndRelationships/view

Cloud Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Appointment

Details Fields & Relationships

Page Layouts Lightning Record Pages Buttons, Links, and Actions Compact Layouts Field Sets Object Limits Record Types Related Lookup Filters Search Layouts List View Button Layout Restriction Rules Scoping Rules

Fields & Relationships 11 items, Sorted by Field Label

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		

31°C Partly sunny 18:16 30-09-2024

Student - Skill Wallet Billing details and feedback | Salesforce Service records | Salesforce Your temporary password has b vvit-11d-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01dM000002g2tt/FieldsAndRelationships/view

Cloud Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER Billing details and feedback

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

Fields & Relationships 9 items, Sorted by Field Label

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)		

31°C Partly sunny 18:16 30-09-2024

Customer Details

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

Service records

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment	Appointment__c	Lookup(Appointment)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Quality Check Status	Quality_Check_Status__c	Checkbox		✓
Service records Name	Name	Auto Number		✓
Service Status	Service_Status__c	Picklist		✓

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 been sent to your email

It's Better in Lightning

Move to Lightning Experience and give your users a productivity boost.

Appointment Validation Rule

Back to Appointment

Validation Rule Detail

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 valid 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

Lightning Experience Transition Assistant

Move to the new, more productive Salesforce.

Get Started

Salesforce Mobile Quick Start

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- Privacy Center
- Security Controls
- Domain Management
- Communication Templates
- Transition Workbench

Breaking news

Tirupati Laddu R...

19:46 ENG IN 30-09-2024

Student - Skill Wallet | Service records | Salesforce | Service records Validation Rule | Appointment Validation Rule | Your temporary password has been sent to your email

It's Better in Lightning

Move to Lightning Experience and give your users a productivity boost.

Service records Validation Rule

Back to Service records

Validation Rule Detail

Rule Name	service_status_note	Active	
Error Condition Formula	NOT(ISNULL(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

Lightning Experience Transition Assistant

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Salesforce Mobile Quick Start

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- Manage Territories
- Company Profile

Hot weather Now

19:47 ENG IN 30-09-2024

The screenshot shows the Salesforce interface for creating a validation rule. The top banner says "It's Better in Lightning" and "Move to Lightning Experience and give your users a productivity boost". The main page title is "Billing details and feedback Validation Rule". The validation rule detail section includes:

Field	Value
Rule Name	rating_should_be_less_than_5
Error Condition Formula	NOT(REGEX(Rating_for_service__c , "[1-5]{1}"))
Error Message	rating should be from 1 to 5
Description	
Created By	Yoshitha Reddy Nakka, 30/09/2024, 7:48 pm
Active	✓
Error Location	Rating for service
Modified By	Yoshitha Reddy Nakka, 30/09/2024, 7:48 pm

The left sidebar shows the Lightning Experience Transition Assistant and various Administer options like Release Updates, Manage Users, etc.

Duplicate rule

The screenshot shows the Salesforce interface for managing matching rules. The top banner says "Matching Rules | Salesforce". The main page title is "Matching Rule: Matching customer details". The matching rule detail section includes:

Field	Value
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	Active
Created By	Yoshitha Reddy Nakka, 30/09/2024, 7:50 pm
Modified By	Yoshitha Reddy Nakka, 30/09/2024, 7:50 pm

The left sidebar shows the Lightning Experience Transition Assistant and various Administer options like Release Updates, Manage Users, etc.

The screenshot shows the Salesforce interface for managing duplicate rules. The top navigation bar includes tabs for 'Student - Skill Wallet', 'Duplicate Rules | Salesforce', and 'Customer Details Duplicate Rule'. The URL in the address bar is vvit-11d-dev-ed.develop.my.salesforce.com/0BmM000006J46z?setupid=DuplicateRules. The main content area displays a 'Customer Details Duplicate Rule' named 'Customer Detail duplicate'. The rule is set to 'Allow' for both 'Action On Create' and 'Action On Edit', and it uses the 'Matching customer details' matching rule. The 'Matching Criteria' section specifies conditions for 'Customer_Details: Gmail EXACT MatchBlank = FALSE' and 'Customer_Details: Phone_number EXACT MatchBlank = FALSE'. The rule was created by 'Yoshitha Reddy Nakka' on 30/09/2024, 7:51 pm, and modified by the same user at the same time. The left sidebar shows the Lightning Experience Transition Assistant and the Administer section with various management links.

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.

The screenshot shows the 'Profile: Manager' page in the Salesforce interface. The profile details include:

- Name:** Manager
- User License:** Salesforce
- Description:** (empty)
- Created By:** Yoshitha Reddy Nakka, 30/09/2024, 8:15 pm
- Modified By:** Yoshitha Reddy Nakka, 30/09/2024, 8:18 pm

Page Layouts:

Object	Layout Type	Assignment
Global	Global Layout	[View Assignment]
Email Application	Not Assigned	[View Assignment]
Home Page Layout	DE Default	[View Assignment]
Account	Account Layout	[View Assignment]
Alternative Payment Method	Alternative Payment Method Layout	[View Assignment]
Appointment Invitation	Appointment Invitation Layout	[View Assignment]
Asset	Asset Layout	[View Assignment]
Location Group Assignment	Location Group Assignment Layout	[View Assignment]
Macro	Macro Layout	[View Assignment]
Object Milestone	Object Milestone Layout	[View Assignment]
Operating Hours	Operating Hours Layout	[View Assignment]
Opportunity	Opportunity Layout	[View Assignment]
Opportunity Product	Opportunity Product Layout	[View Assignment]
Order	Order Layout	[View Assignment]

The screenshot shows the 'Profile: sales person' page in the Salesforce interface. The profile details include:

- Name:** sales person
- User License:** Salesforce Platform
- Description:** (empty)
- Created By:** Yoshitha Reddy Nakka, 30/09/2024, 8:25 pm
- Modified By:** Yoshitha Reddy Nakka, 30/09/2024, 8:26 pm

Page Layouts:

Object	Layout Type	Assignment
Global	Global Layout	[View Assignment]
Email Application	Not Assigned	[View Assignment]
Home Page Layout	Home Page Default	[View Assignment]
Account	Account Layout	[View Assignment]
Alternative Payment Method	Alternative Payment Method Layout	[View Assignment]
Appointment Invitation	Appointment Invitation Layout	[View Assignment]
Asset	Asset Layout	[View Assignment]
Asset Relationship	Asset Relationship Layout	[View Assignment]
Assigned Resource	Assigned Resource Layout	[View Assignment]
Lead	Lead Layout	[View Assignment]
Location	Location Layout	[View Assignment]
Location Group	Location Group Layout	[View Assignment]
Location Group Assignment	Location Group Assignment Layout	[View Assignment]
Object Milestone	Object Milestone Layout	[View Assignment]
Operating Hours	Operating Hours Layout	[View Assignment]
Order	Order Layout	[View Assignment]
Order Product	Order Product Layout	[View Assignment]
Payment	Payment Layout	[View Assignment]

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

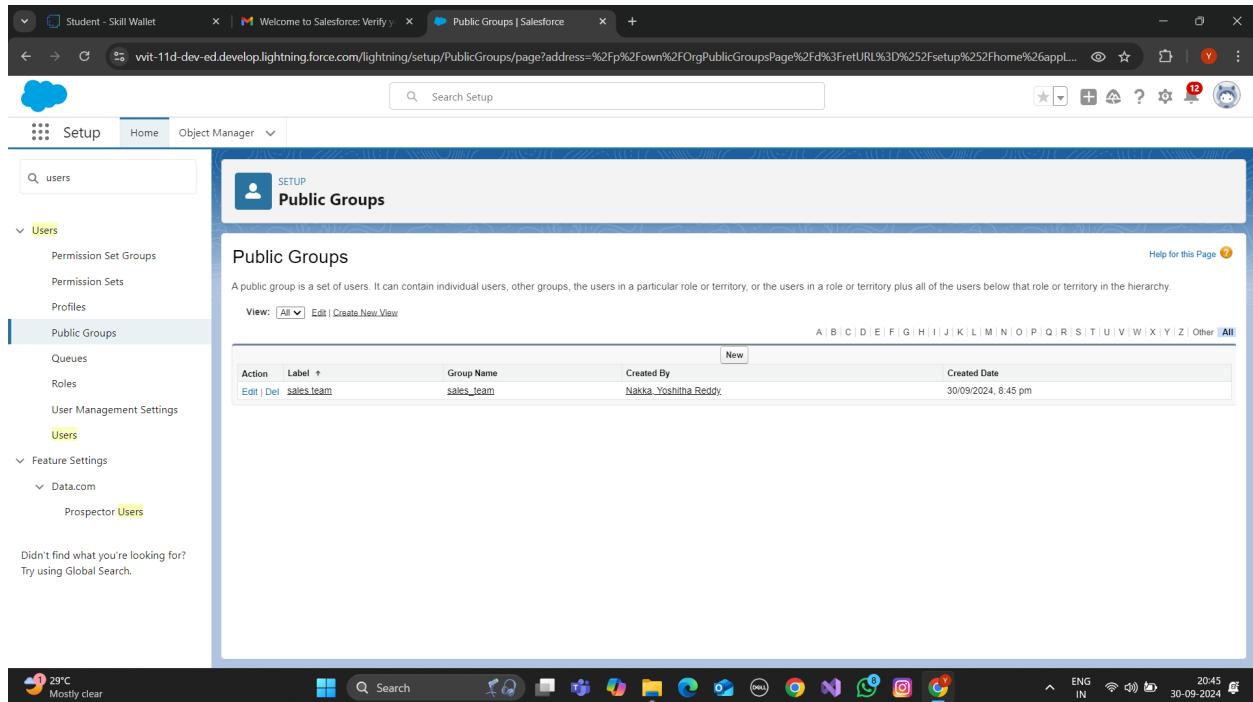
A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what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

The screenshot shows the Salesforce 'All Users' page. On the left, there is a sidebar with navigation links for Setup, Home, Object Manager, and various system settings like Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and Feature Settings. The 'Users' link under 'User Management Settings' is highlighted. The main content area is titled 'All Users' and contains a table of users. The table columns are: Action, Full Name, Alias, Username, Role, Active, and Profile. The data in the table is as follows:

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	bk_bhoomika	booms	bkbhoomika@gmail.com	sales person	✓	sales person
Edit	ch_julasingh	tulasi	chhikenchitkenulasingh@gmail.com	sales person	✓	sales person
Edit	Chatter_Expert	Chatter	chatv00dm000000cxlfuar-toetayvv70sl@chatter.salesforce.com	Chatter Free User	✓	
Edit	Mikaelson_Niklaus	Nik	nakkayoshima123@gmail.com	Manager	✓	Manager
Edit	Nakka_Yoshima Reddy	YNakk	yoshihavvif@company.com	System Administrator	✓	
Edit	pynda_rupa_modini	nibbi	sairupamodini@gmail.com	sales person	✓	sales person
Edit	User_Integration	integ	integration@00dm0000000cxlfuar.com	Analytics Cloud Integration User	✓	
Edit	User_Security	sec	insightssecurity@00dm0000000cxlfuar.com	Analytics Cloud Security User	✓	

Public groups

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

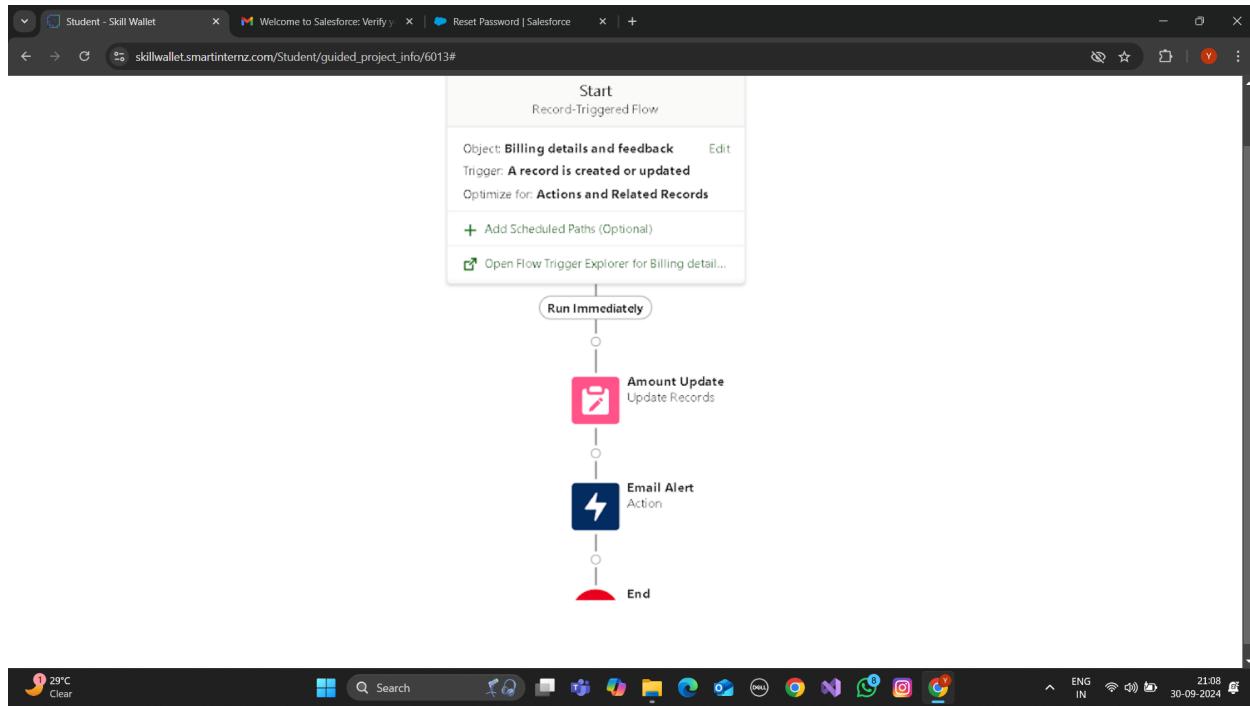


Sharing Setting

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

```
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 }
```

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 your email 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**

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

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
5	Sum of Payment Paid Record Count	₹5,000	2	₹5,000
Total	Sum of Payment Paid Record Count	₹20,000	6	₹20,000

Sum of Payment Paid

Customer Name Appointment Date Service Status Payment Paid

	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

Student - Skill Wallet Welcome to Salesforce: Verify... 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

