

Garage Management System

The Garage Management System helps repair experts improve service, skill, and customer relationships. GMS empowers garages to succeed in a militant market, ensuring a smooth undergo for all. The **Garage Management System (GMS)** is a comp software solution designed to streamline and optimize the tasks of self-propelled repair adeptness, service centres, and garages. It provides an array of features tailored to meet the needs of mechanics, service advisors, and business owners, ensuring smoother workflows and higher customer content.

- **Appointment Scheduling**

- Simplifies the booking process for customers.
- Enables staff to manage daily schedules effectively, reducing downtime and improving resource allocation.

- **Vehicle Management**

- Maintains detailed vehicle records, including service history, repairs, and maintenance schedules.
- Tracks vehicle status during servicing for better talk with customers.

- **Customer Relationship Management (CRM)**

- Stores customer details and penchant.
- Sends service reminders, follow-ups, and message offers to build loyalty.

- **Stock list and Spare Parts Management**

- Tracks spare parts stock levels, automates reordering, and prevents stock outs.
- Ensures that mechanics always have the essential tools and parts on hand.

- **Billing and Invoicing**

- Generates business invoices fast.
- Supports multiple payment methods, discounts, and tax computing.

- **Work Order Management**

- Creates detailed work orders with a list of tasks, idea costs, and timelines.
- Helps staff value jobs and ensures timely completion.

- **Reporting and Data**

- Provides insights into key performance index like revenue, job completion rates, and customer feedback.
- Helps place trends and areas for betterment.

Salesforce

debut:

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you have answered yes to any of these questions, then you are in the right place. This module is for you. Welcome to Salesforce! Salesforce is game-changing applied science, with a host of output-boosting features that will help you sell smarter and faster. We shall guide you through these features and answer, "What Salesforce, anyway?"

What Is Salesforce?

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

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

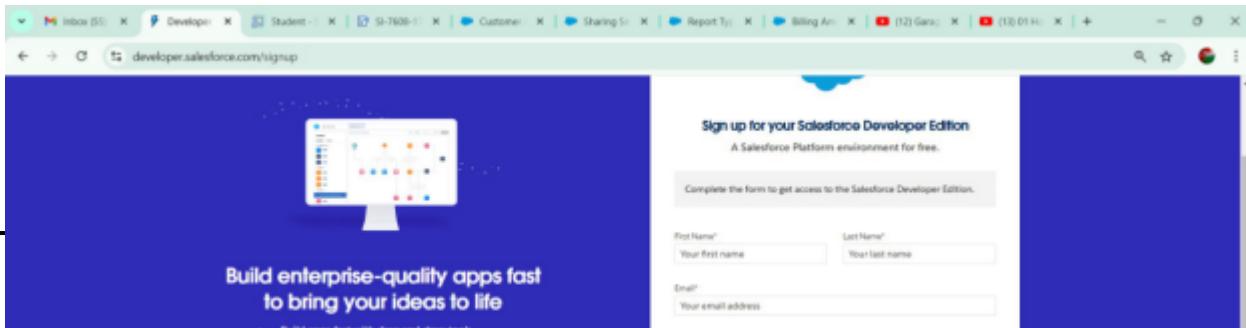
So what does that cruel denote?

<https://youtu.be/r9EX3IGde5k>

Creating Builder Account:

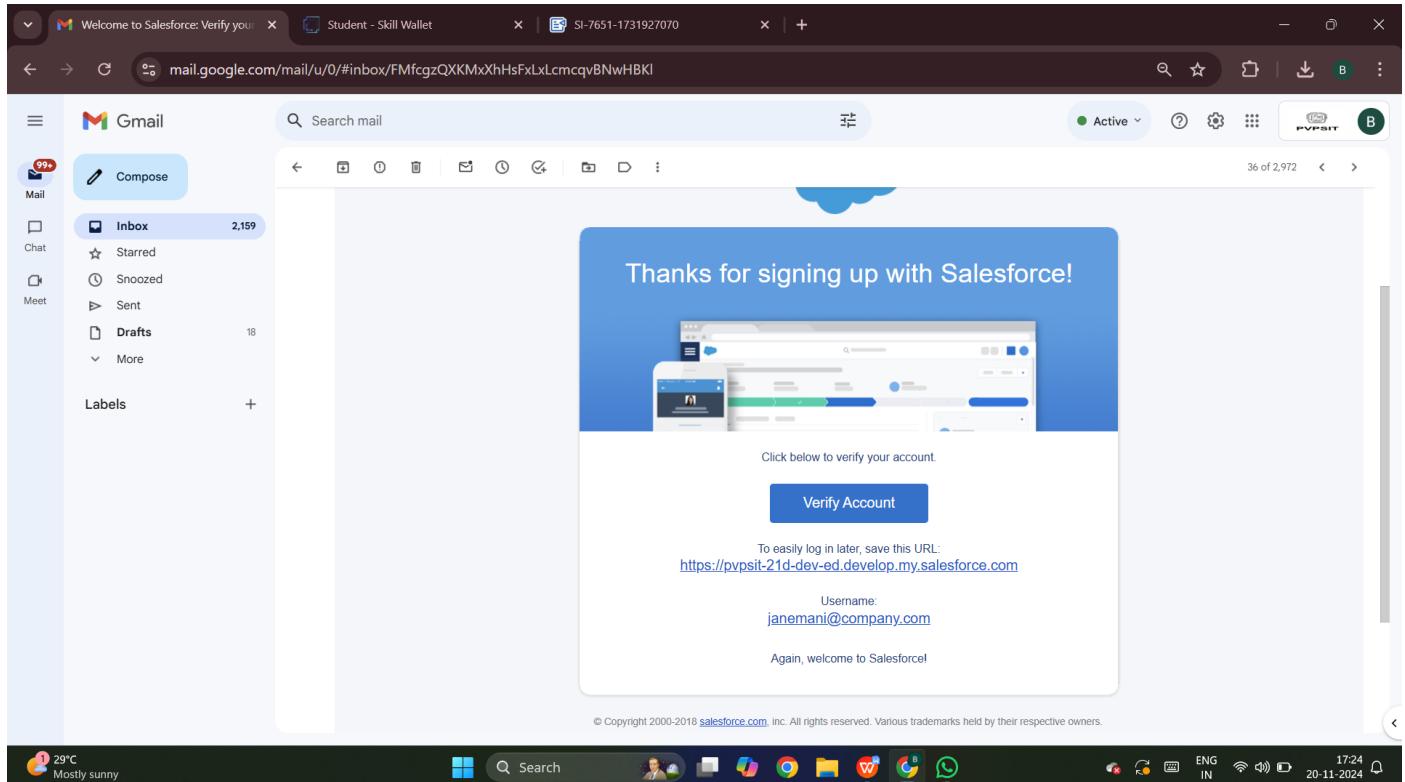
Creating a builder agreement in salesforce.

1. Go to <https://developer.salesforce.com/signup>
2. On the sign-up form, enter the following details:
3. Give First name & Last name.
4. Email
5. Role : Builder
6. Company - College Name
7. County : India
8. Postal Code - pin code
9. Username : should be a combining 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.



Account Start

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account.



OBJECT

What Is an Object?

Salesforce objects are database tables that permit you to store data that is specific to an agreement. 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 user-defined entities designed to cater to the unique and specific needs of a system. They play a pivotal role in an coating's framework, serving as the foundation for structuring and sharing essential data in effect.

Create Customer Details Object

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
1. Click on Allow reports and Track Field History,
2. Allow search >> Save.

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

SETUP New Custom Object

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more](#) [Want more like this?](#)

Custom Object Definition Edit

Custom Object Information

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

Label	Appointment	Example: Account
Plural Label	Appointments	Example: Accounts
Starts with lower case	<input type="checkbox"/>	

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

Object Name	Appointment	Example: Account
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Description

Context-Sensitive Help Definition

Content Name	Appointment Name	Example: Account Name
--------------	------------------	-----------------------

Context-Sensitive Help Definition

Content Name	Appointment	Example: Account
--------------	-------------	------------------

Open the standard Salesforce.com Help & Training window Open a window using a Visualforce page

Enter Record Name Label and Format:

The Record Name appears in page layouts, key tabs, related tabs, rollups, 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.

Name	Appointment Name	Example: Account Name
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Date Type

Display Format	Auto Number	Warning: If you plan to insert a high volume of records in this object via the API for example, use the Text data type.
----------------	-------------	---

Starting Number

Starting Number	1
-----------------	---

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 not 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

Create Service records Object

To create an object:

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

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by adding custom profiles. [Learn more](#) [View object permissions](#)

Custom Object Definition Edit

Custom Object Information

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

Label:	Service records	Example:	Account
Plural Label:	Service records	Example:	Accounts
Start with vowel sound:	<input type="checkbox"/>		

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

Object Name:	Service_records	Example:	Account
--------------	-----------------	----------	---------

Description:

Context-Derivative Help Setting:

- Open the standard Salesforce.com Help & Training window
- Open a window using a Visualforce page

Content Name:

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.

Record Name:	Service recordsName	Example:	Account Name
--------------	---------------------	----------	--------------

Date Type:

Display Format: bill-{000} Example: A-00000 What Is This?

Starting Number: 1

Optional Features

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

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

Allow Sharing
 Allow Bulk API Access
 Allow Streaming API Access

Deployment Status

In Development
 Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

Allow Search

Object Creation Options (Available only when custom object is first created)

Add Notes and Attachments related list to default page layout
 Launch New Custom Tab Wizard after saving this custom object

Save **Save & New** **Cancel**

Create Billing details and feedback Object

To create an object:

- From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
- Enter the label name >> Billing details and feedback
- Plural label name - Billing details and feedback
- Enter Record Name, Label, and Format
 - Record Name - Billing details and feedback Name
 - Data Type - Auto Number
 - Display Format >> bill-{000}
 - Starting number - 1
- Click on Allow reports and Track Field History,
- Allow search >> Save.

New Custom Object

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

Custom Object Definition Edit Save | Save & New | Cancel

Custom Object Information

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

Label: Example: Account
Plural Label: Example: Accounts
Starts with vowel sound:

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

Object Name: Example: Account

Description:

Contact-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window Open a window using a Visualforce page

Comment 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

Date Type: Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.
Default Format: Example: A-[0000] What Is That?
Starting Number:

Optional Features

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

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).

Allow Sharing
 Allow Bulk API Access
 Allow Streaming API Access

Deployment Status

In Development
 Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).

Allow Search

Object Creation Options [Available only when custom object is first created]

Add Notes and Attachments related list to default page layout
 Launch New Custom Tab Wizard after saving this custom object

Save | Save & New | Cancel

Tabs

What is a Tab : A tab serves as a user interface component designed to create records for objects and help the viewing and management of those records within the objects.

Types of Tabs:

1. Custom Tabs

Custom object tabs are the user interface for custom covering 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 covering embedded in the salesforce.com window. Web tabs make it easier for your users to access content and coating they often use without leaving the salesforce.com coating.

3. Visual-force Tabs

Visual-force Tabs are custom tabs that display a Visual-force page. Visual-force tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and chances.

4. Lightning Component Tabs

Lightning Component tabs allow you to add Lightning components to the seafaring menu in Lightning E skill and the mobile app.

5. Lightning Page Tabs

Lightning Page Tabs let you add Lightning Pages to the mobile app sailing menu. Lightning Page tabs do not work like other custom tabs. Once created, these tabs do not appear on the All Tabs page when you click the Plus icon located to the right of your current tabs.

Creating a Custom Tab

To create a Tab:(Customer Details)

1. Go to the setup page >> type Tabs in the Quick Find bar >> click on tabs >> New (under the custom object tab)
2. Select Object(Customer Details) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .
3. Ensure to check the option "**Append tab to users' existing personal design.**"
4. Click save.

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.

Welcome to Salesforce: V... Student - Skill Wallet Student - Skill Wallet Tabs | Salesforce (12) Garage Management (13) 01 How to Create Cu... prasadvpoturisiddharth-22b-dev-ed.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fu%2Fcustomtabs.jsp%3Fsetupid%3DCustomTabs%26retURL%3D%252... 0 10 11 12 13

The screenshot shows the Salesforce Setup interface with the 'Custom Tabs' page selected. The left sidebar has 'Setup' selected under 'User Interface'. The main content area is titled 'Custom Tabs' and contains three sections: 'Custom Object Tabs', 'Web Tabs', and 'Visualforce Tabs'. The 'Custom Object Tabs' section lists four tabs: 'Assignments' (People style), 'Billing details and feedback' (Presenter style), 'Customer Details' (Call phone style), and 'Service records' (Form style). The 'Web Tabs' and 'Visualforce Tabs' sections both show a message: 'No [Tab Type] have been defined'.

Setup Home Object Manager

Search Setup

User Interface

Rename Tabs and Labels

Tabs

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

Custom Tabs

Help for this Page

Custom Object Tabs

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

New What Is This?

No Web Tabs have been defined

Visualforce Tabs

New What Is This?

No Visualforce Tabs have been defined

27°C Mostly clear

Search

ENG IN 21:21 16-11-2024

The Lightning App

An app is a collection of items that work together to serve a special 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 pilotage bar.

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

Create a Lightning App

To create a lightning app page:

1. Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App.
2. Fill the app name in app details as Garage Management >> Next >> (Appoption page) keep it as default >> Next >> (Use Items) keep it as default >> Next.
3. To Add route Items:
4. Select the items (Customer Details, Appointments, Service records, Billing details and feedback, Reports and Dashboards) from the search bar and move them using the arrowbutton >> Next.

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

The screenshot shows the "Lightning Experience App Manager" page in the Salesforce Setup. The sidebar on the left is expanded to show the "Apps" section, with "App Manager" selected. The main content area displays a table of 24 items, sorted by App Name. The table includes columns for App Name, Developer Name, Description, Last Modified, Type, and Status. One row, "Garage Management Application", is highlighted with a red border. The status column for this row shows "Lightning" with a checkmark. The bottom of the screen shows the standard Salesforce navigation bar with icons for Home, Object Manager, and various apps.

App Name	Developer Name	Description	Last Modified	Type	Status
All Tabs	AltTabSet	Build CRM Analytics dashboards and apps	16/11/2024, 7:28 pm	Classic	
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	16/11/2024, 7:28 pm	Classic	
App Launcher	AppLauncher	App Launcher tabs	16/11/2024, 7:28 pm	Classic	
Automation	FlowsApp	Automate business processes and repetitive tasks	16/11/2024, 7:33 pm	Lightning	
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry	16/11/2024, 7:32 pm	Lightning	
Business Rules Engine	ExpressionSetConsole	Create and maintain business rules that perform complex lookups and cal...	16/11/2024, 7:28 pm	Lightning	
Community	Community	Salesforce CRM Communities	16/11/2024, 7:28 pm	Classic	
Content	Content	Salesforce CRM Content	16/11/2024, 7:28 pm	Classic	
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes	16/11/2024, 7:28 pm	Lightning	
Digital Experiences	SalesforceCMS	Manage content and media for all of your sites	16/11/2024, 7:28 pm	Lightning	
Garage Management Application	Garage_Management_Application		16/11/2024, 9:27 pm	Lightning	✓
Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	16/11/2024, 7:28 pm	Lightning	
Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects	16/11/2024, 7:28 pm	Classic	
Platform	Platform	The fundamental Lightning Platform	16/11/2024, 7:28 pm	Classic	

Fields

When we talk about Salesforce, Fields represent the data stored in the columns of a database. It can also hold any useful entropy that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

Types of Fields

1. Standard Fields
2. Custom Fields

Creation of fields for the Customer Details object

1. To create fields in an object:

- a. Go to setup >> click on Object Manager >> type object name(Customer Details) in searchbar >> click on the object.
- b. Now click on "Fields & Relationships" >> New
- c. Select Data Type as a "Phone"
- d. Click on next.
- e. Fill the Above as following:

1. Field Label: Phone number
2. Field Name : gets auto yield
3. 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:

- a. Go to setup >> click on Object Manager >> type object name(Customer Details) in searchbar >> click on the object.
- b. Now click on "Fields & Connection" >> New
- c. Select Data type as "Email" and Click on Next
- d. Fill the Above as following:
- e. Field Label : Gmail
- f. Field Name : gets auto brought forth
Click on Next >> Next >> Save and new.

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		

Creation of Lookup Fields

Creation of Lookup Field on Appointment Object :

1. Go to setup >> click on Object Manager >> type object name (Appointment) in the search bar >> click on the object.
2. Now click on “Fields & Connection” >> New
3. Select “Look-up kinship” as a data type and click Next.
4. Select the related object “Customer Details” and click next.
5. Next >> Next >> Save.

Note: Ensure you complete action four Before the process.

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 & Connection” >> New
3. Select “Look-up kinship” as a data type and click Next.
4. Select the related object “ Appointment ” and click next.
5. Make it a required field so click on Required.
6. Scroll down for Lookup Filter and click on Show filter settings.

- Now add the filter measure.
7. Field : Appointment: Appointment Date >> handler : less than >> select field >> Appointment: Created Date
 8. The filter type must be set to "Required" by the user. Enable the filter by click on Active.
 9. 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 andfeedback) in the search bar >> click on the object.
2. Now click on "Fields & Connection" >> New.
3. Select "Look-up kinship" as a data type and click Next.
4. Select the related object " Service records" and click next.
5. Next >> Next >> Save & new.

Creation of Checkbox Fields

Creation of Checkbox Field on Appointment Object :

1. Go to setup >> click on Object Manager >> type object name (Appointment) inthe search bar >> click on the object.
2. Now click on "Fields & connection" >> New.
3. Select "Check box" as data type and click Next.
4. Give the Field Label : Maintenance service
5. Field Name : is auto filled
6. Default value : unchecked
7. Click on next >> next >> save.

Creation of Another Checkbox Field on Appointment Object :

1. Repeat the steps from one to 3.
2. Give the Field Label : Repairs
3. Field Name : is auto filled.
4. Default value : unchecked
5. Click on next >> next >> save.
6. Follow the same and create another checkbox with given names
7. Give the Field Label : new Parts
8. Field Name : is auto filled.
9. Default value : unchecked

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

The screenshot shows the Salesforce setup interface for the 'Appointment' object. The left sidebar lists various configuration options like Page Layouts, Lightning Record Pages, Buttons, etc. The main area displays the 'Fields & Relationships' section with 9 items. The table has columns for FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
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)		✓
Phone number	Phone_number__c	Phone		
Repairs	Repairs__c	Checkbox		
Replacement Parts	Replacement_Parts__c	Checkbox		

Creation of Checkbox Field on Service records Object :

1. Go to setup >> click on Object Manager >> type object name (Service records) inthe search bar >> click on the object.
2. Now click on "Fields & connection >> New.
3. Select "Check box" as data type and click Next.
4. Give the Field Label : Quality Check Status
5. Field Name : is auto filled.
6. Default value : unchecked
7. Click on next >> next >> save

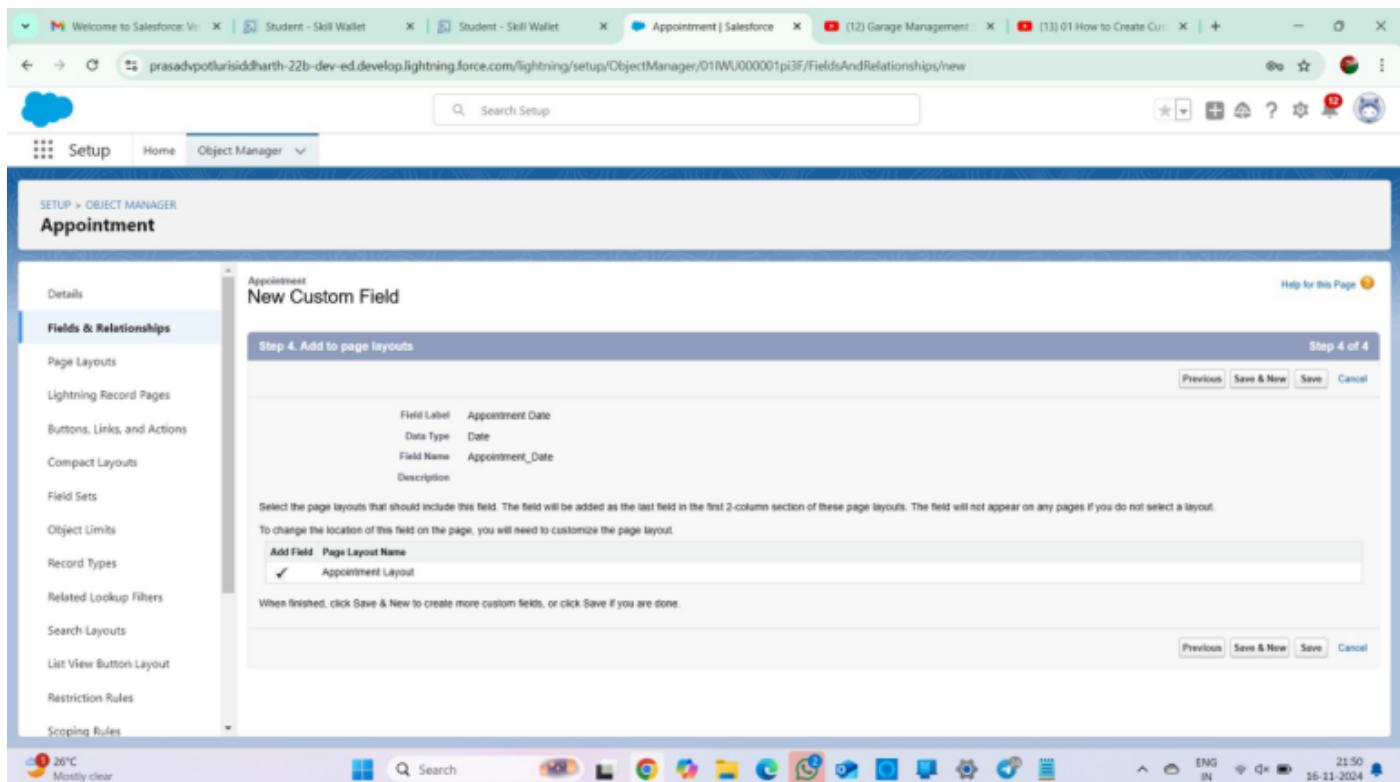
The screenshot shows the Salesforce Setup interface for the 'Service records' object. The left sidebar lists various setup categories under 'Fields & Relationships'. The main area displays a table of fields with the following data:

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)		✓
Phone number	Phone_number_c	Phone		
Quality Check Status	Quality_Check_Status_c	Checkbox		
Service recordsName	Name	Auto Number		✓

Creation of date Fields

Creation of Date Field on Appointment Object :

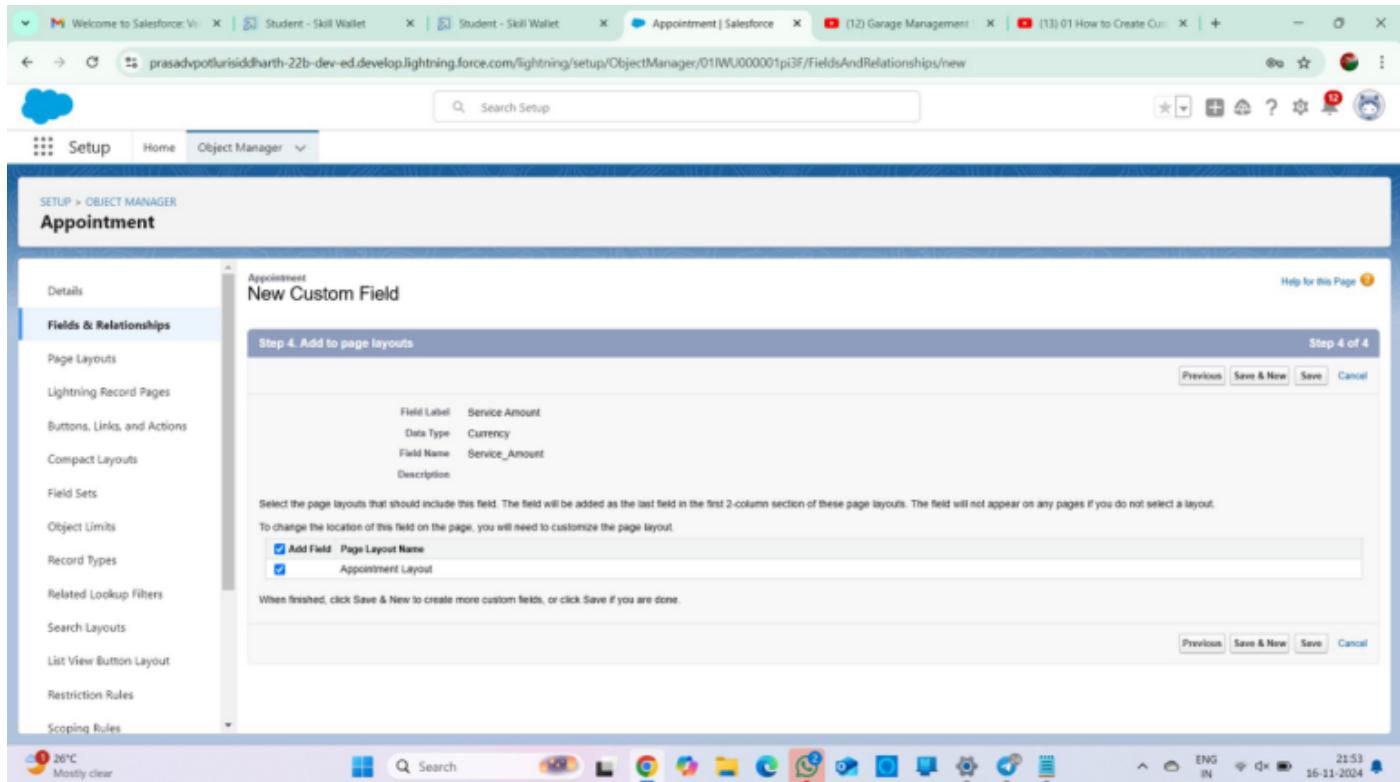
1. Go to setup >> click on Object Manager >> type object name (Appointment) in the search bar >> click on the object.
2. Now click on "Fields & connection" >> New.
3. Select "Date" as data type and click Next.
4. Give the Field Label : Appointment Date
5. Field Name : is auto filled.
6. Make it as a Required field by click on the Required option.
7. Click on next >> next >> save.



Creation of Currency Fields

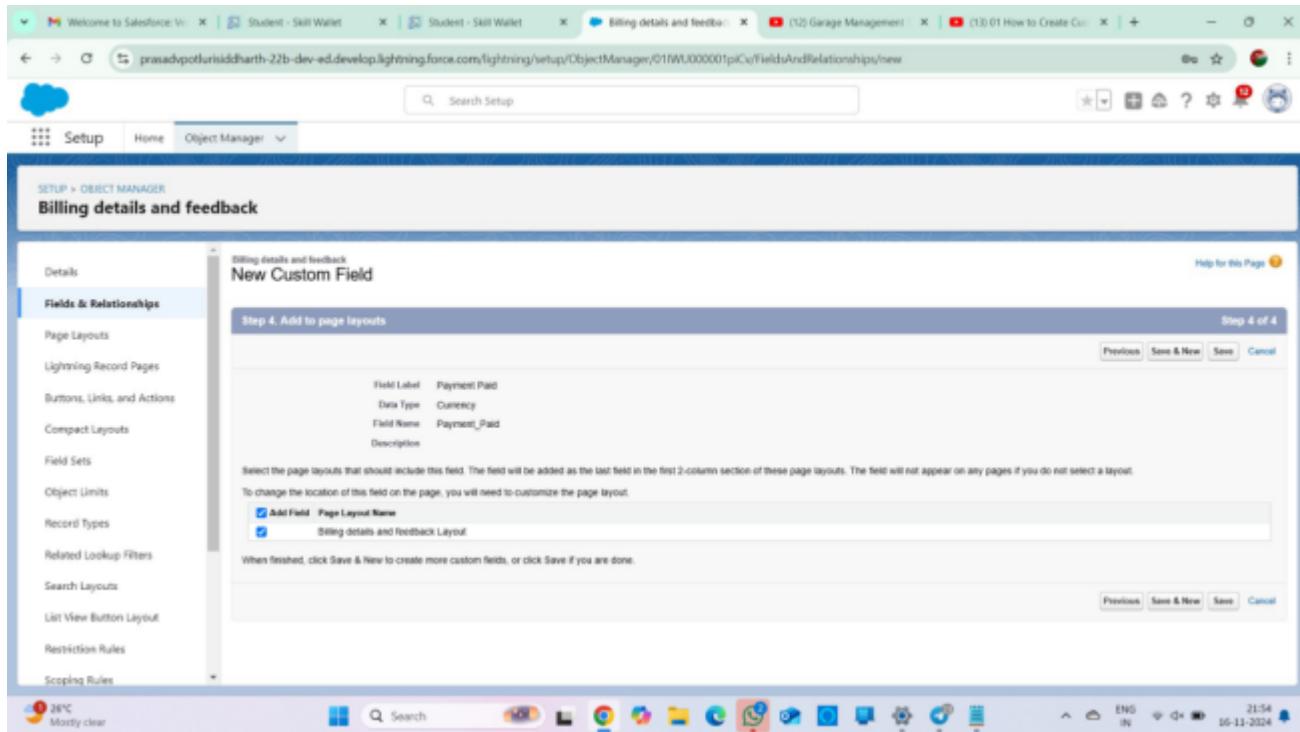
Creation of Currency Field on Appointment Object :

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 & connection" >> New.
3. Select "Currency" as data type and click Next.
4. Give the Field Label : Service Amount
5. Field Name : is auto filled.
6. Click on next
7. Give read only for all the profiles in field level surety for profile.
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 Name : is auto filled.



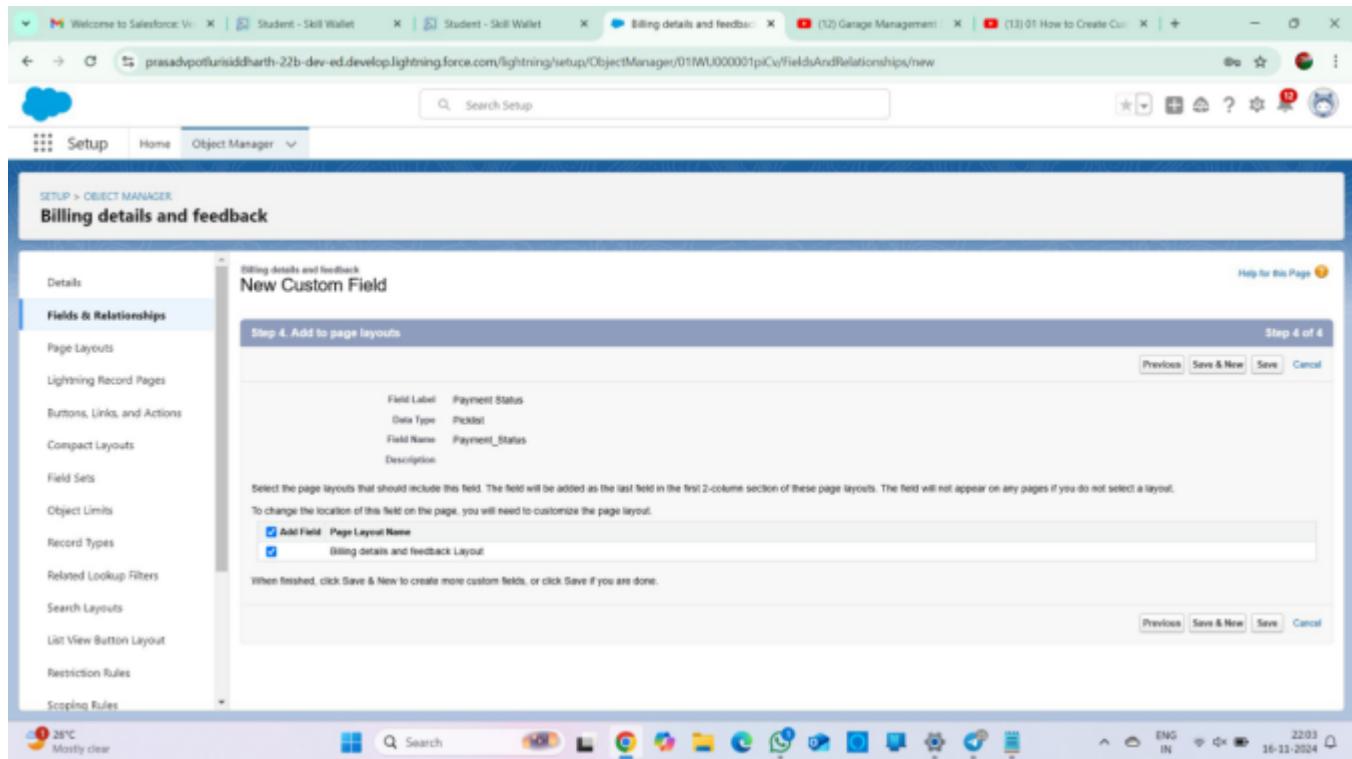
Creation of Text Fields

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 & Connection” >> New.
3. Select “Text” as data type and click Next.
4. Give the Field Label : Vehicle number plate
5. Field Name : is auto filled.
6. Length : 10
7. Make field as Required and Unique.
8. Click on next >> next >> save.

Creation of Text Fields in Billing details and feedback object :

1. Go to setup >> click on Object Manager >> type object name (Billing details andfeedback) in the search bar >> click on the object.
2. Now click on “Fields & Connection” >> New.
3. Select “text” as data type and click Next.
4. Give the Field Label : Rating for service
5. Field Name : is auto filled.

6. Length : 1
7. Make field as Required and Unique.
8. Click on next >> next >> save



Creating Formula Field in Service records Object

1. Go to setup >> click on Object Manager >> type object name(Service records) in searchbar >> click on the object.
2. Click on fields & kinship >> click on New.
3. Select Data type as "Formula" and click Next.
4. Give Field Label and Field Name as "service date" and select formula return type as "Date" and click next.
5. Insert field formula should be : Created Date
6. click "Check Syntax".
7. Click next >> next >> Save.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment	Appointment_c	Lookup(Appointment)		<input checked="" type="checkbox"/>
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		<input checked="" type="checkbox"/>
Phone number	Phone_number__c	Phone		
Quality Check Status	Quality_Check_Status__c	Checkbox		
service date	service_date__c	Formula (Date)		
Service recordsName	Name	Auto Number		<input checked="" type="checkbox"/>

proof rules are applied when a user tries to save a record and are used to check if the data meets specified measure. If the standard is not met, an error message is triggered by the proof rule, preventing the record from being saved until the issues are resolved.

To create a proof rule to an Appointment Object

1. Go to the setup page >> click on the object manager >> From the drop-down, click edit for Appointment object.
2. Click on the proof rule >> click New.
3. Enter the Rule name as " Vehicle ".
4. Insert the Error Condition Formula as :-
`NOT(REGEX(Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))`
5. Enter the Error Message as "Please enter valid number ", select the Error location asField and select the field as "Vehicle number plate", and click Save

The screenshot shows the Salesforce Object Manager page. At the top, there are several tabs: 'Welcome to Salesforce: V...', 'Student - Skill Wallet', 'Student - Skill Wallet', 'Object Manager | Salesforce', '(12) Garage Management...', and '(13) 01 How to Create C...'. The main content area is titled 'Appointment Validation Rule' under 'Object Manager'. It displays a table with the following data:

Validation Rule Detail	
Rule Name	Vehicle
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
Description	
Created By	KONDURU BHANU HARSHA, 16/11/2024, 10:09 pm
Modified By	KONDURU BHANU HARSHA, 16/11/2024, 10:09 pm

At the bottom of the page, there is a toolbar with various icons and a status bar showing weather (20°C, Mostly clear), search, and system information (ENG IN, 16-11-2024, 22:09).

To create a proof rule to an Service records Object

1. Go to the setup page >> click on the object manager >> From the drop-down, click edit for Service records object.
2. Click on the proof rule >> click New.
3. Enter the Rule name as "service_status_note".
4. Insert the Error Condition Formula as :-

NOT(ISPICKVAL(Service_Status_c , "Completed"))

Enter the Error Message as "still it is pending", select the Error location as Field and select the field as "Service status", and click Save.

The screenshot shows the Salesforce Object Manager page. The title bar includes tabs for 'Welcome to Salesforce', 'Student - Skill Wallet', 'Object Manager | Salesforce', and several YouTube video thumbnails. The main content area is titled 'Service records Validation Rule' under 'Object Manager'. It displays a 'Validation Rule Detail' table with the following data:

Validation Rule Detail		Active	
Role Name	service_status_rule	<input checked="" type="checkbox"/>	
Error Condition Formula	NOT(ISPICKVAL(Service_Status__c , "Completed"))		
Error Message	still it is pending	Error Location	
Description		Service Status	
Created By	KONDURU BHANU HARSHA, 16/11/2024, 10:17 pm	Modified By	KONDURU BHANU HARSHA, 16/11/2024, 10:17 pm

At the bottom of the page, there is a toolbar with various icons and a status bar showing the date (16-11-2024) and time (22:17).

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

1. Go to the setup page >> click on the object manager >> From the drop-down, click edit for Billing details and feedback object.
2. Click on the proof 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}"))

Enter the Error Message as “rating should be from 1 to 5”, select the Error location as Fieldand select the field as “Rating for Service”, and click Save.

Welcome to Salesforce: V... X Student - Skill Wallet X Student - Skill Wallet X Object Manager | Salesforce X (12) Garage Management: X (13) 01 How to Create C... X +

prasadpoturisiddharth-22b-dev-ed.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F03dWU000004TpT3

Setup Home Object Manager

Object Manager

Billing details and feedback Validation Rule

Help for this Page

Validation Rule Detail

Edit Close		Active
Rule Name	rating_should_be_less_than_5	<input checked="" type="checkbox"/>
Error Condition Formula	NOT(REGEX(Rating_for_service__c, "[1-5][!"]"))	
Error Message	rating should be from 1 to 5	Error Location
Description		Rating for service
Created By	KONOURU BHANU HARSHA, 16/11/2024, 10:19 pm	Modified By
		KONOURU BHANU HARSHA, 16/11/2024, 10:19 pm

26°C Mostly clear Search

ENG IN 16-11-2024 22:19

Duplicate rule

To create a matching rule to an Customer details Object

1. Go to quick find box in setup and search for matching Rule.
2. Click on the matching rule >> click on New Rule.
3. Select the object as Customer details and click Next.
4. Give the Rule name : Matching customer details
5. Unique name : is auto filled.
6. Define the matching standard as
7. FieldMatching Method
 - a. GmailExact
 - b. Phone Number
8. Click save.
9. After Saving, Click on Activate.

To create a Duplicate rule to an Customer details Object

1. Go to quick find box in setup and search for Duplicate rules.
2. Click on Duplicate rule >> click on New Rule >> select customer details object.
3. Give the Rule name as : Customer Detail duplicate
4. Scroll a little in the Matching rule section
5. Select the matching rule : Matching customer details
6. Moreover, Click on save.
After saving the Duplicate Rule, Click on Activate.

Welcome to Salesforce: V... Student - Skill Wallet Student - Skill Wallet Duplicate Rules | Salesforce (12) Garage Management (13) 01 How to Create Cu... prasadpoturisiddharth-22b-dev-ed.lightning.force.com/lightning/setup/DuplicateRules/page?address=%2F0BmWU000005V8Q1%3Fsetupid%3DDuplicateRules

Setup Home Object Manager Search Setup

Q_ duplic

Data Duplicate Management Duplicate Error Logs Duplicate Rules Matching Rules

Customer Detail Duplicate Rule Customer Detail duplicate

Help for this Page

Duplicate Rule Detail

	Customer Detail duplicate	Order	1 of 1 [Reorder]
Rule Name	Customer Detail duplicate	Operations On Create	<input checked="" type="checkbox"/> Alert <input checked="" type="checkbox"/> Report
Description	Customer Details	Operations On Edit	<input type="checkbox"/> Alert <input type="checkbox"/> Report
Object	Enforce sharing rules	Matching Criteria	(Customer Details: Email exact MATCHES \$M = FALSE) AND (Customer Details: Phone_number EXACT MATCHES \$M = FALSE)
Record-Level Security	Action On Create	Created By	KONDURU BHANU HARSHA, 16/11/2024, 10:25 pm
Action On Edit	Allow	Modified By	KONDURU BHANU HARSHA, 16/11/2024, 10:25 pm
Alert Text	Use one of these records?		
Active			
Matching Rule	<input checked="" type="checkbox"/> Matching customer details <input checked="" type="checkbox"/> Mapped		
Conditions			
Created By			

Did you find what you're looking for?
Try using Global Search.

26°C Mostly clear

Search

22:25 IN 16-11-2024

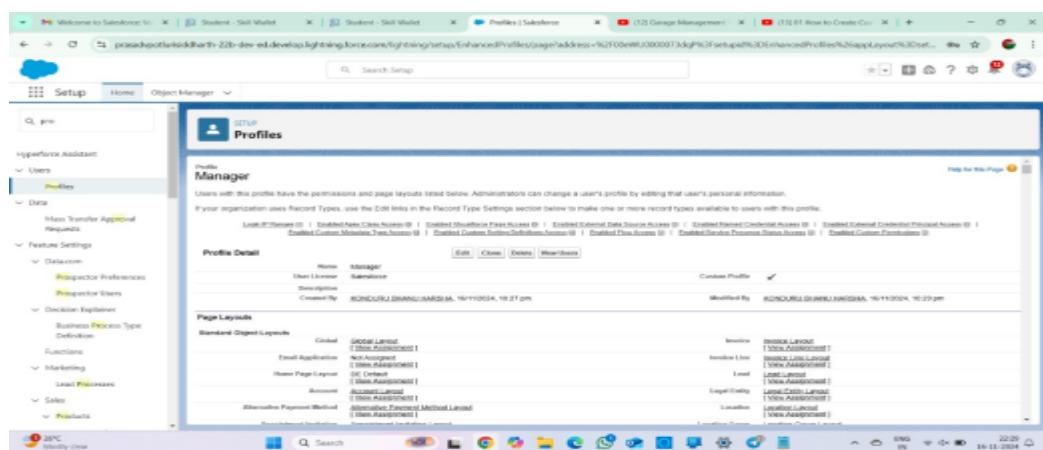
Profiles

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, Tabsettings, App settings, Apex class access, Visual force page access, Page layouts, Record Types, Login hours & Login IP ranges. You can define profiles by the user's job function. Forexample, System manager, Builder, Sales agent.

Manager Profile

To create a new profile:

- a. Go to setup >> type profiles in quick find box >> click on profiles >> clone thedesired profile (Standard User) >> enter profile name (Manager) >> Save.
- b. While still on the profile page, then click Edit.
- c. Select the Custom App settings as default for Garage management.
- d. Scroll down to Custom Object Permissions and Give access permissions for Appointments,Billing details and feedback, service records, and customer detailsobjects as mentioned in the below diagram.
- e. Changing the session times out after should be " 8 hours of inertia".
- f. Change the password policies as mentioned :
- g. User passwords expire in should be " never expires ".
- h. Minimum password length should be " 8 ", and click save.



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 GARagemanagement.
4. Scroll down to Custom Object Permissions and Give access permissions for Appointments, Billing details and feedback, servicerecords, and customer details objects as mentioned in the below diagram.
5. Also, click save.

The screenshot shows the Salesforce Setup interface with the 'Profiles' page open. The left sidebar is collapsed, and the main content area displays the 'Profile Detail' for the 'sales person' profile. The profile details include:

Name	sales person	User License	Salesforce Platform	Custom Profile	✓
Description		Created By	KONDURU BHANU HARSHA, 16/11/2024, 10:36 pm	Modified By	KONDURU BHANU HARSHA, 16/11/2024, 10:37 pm

Below the profile detail, the 'Page Layouts' section shows standard object layouts assigned to various objects:

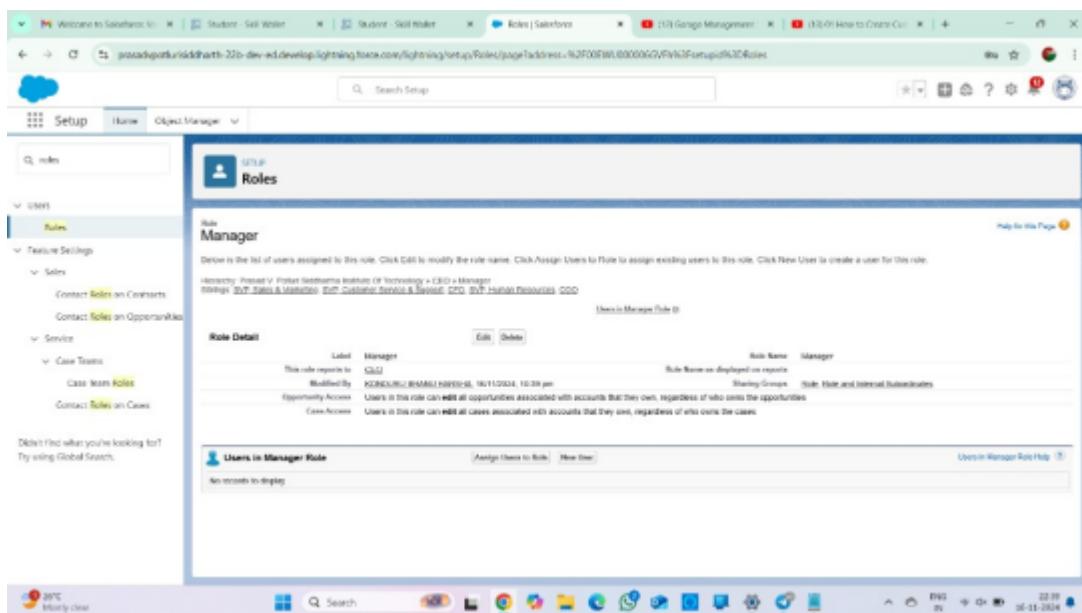
Object	Layout Type	Global Layout	Not Assigned	Home Page Default	Account Layout	Alternative Payment Method Layout	Fulfillment Order Item Tax Layout	Fulfillment Order Product Layout	Varies by Record Type	Individual Layout	Invoice Layout
Global	Global Layout	[View Assignment]					Fulfillment Order Item Tax Layout	[View Assignment]			
Email Application	Not Assigned	[View Assignment]					Fulfillment Order Product Layout	[View Assignment]			
Home Page Layout	Home Page Default	[View Assignment]					Varies by Record Type	[View Assignment]			
Account	Account Layout	[View Assignment]					Individual Layout	[View Assignment]			
Alternative Payment Method	Alternative Payment Method Layout	[View Assignment]					Invoice Layout	[View Assignment]			

Role & Role Hierarchy

A role in Salesforce defines a user's profile access at the record level. Roles specify the types of access that people in your Salesforce system can have to data.

Creating Manager Role

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



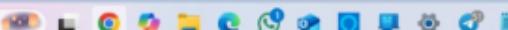
Creating another roles

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

Welcome to Salesforce: V... Student - Skill Wallet Student - Skill Wallet Roles | Salesforce (12) Garage Management: (13) 01 How to Create Cu... prasadpoturisiddharth-22b-dev-ed.lightning.force.com/lightning/setup/Roles/page?address=%2F00EWUJ000006GVM9%3Fsetupid%3DRoles

The screenshot shows the Salesforce Setup interface for managing roles. The left sidebar is titled 'Q. roles' and includes sections for Users, Roles (which is selected), Feature Settings, Sales, Service, and Case Teams. The main content area is titled 'Roles' and shows the 'sales person' role details. The role has a label 'sales person' and a manager 'Manager'. It was modified by 'KONDRUBU BHANU HABSHA' on 16/11/2024, 10:40 pm. The role name is 'sales_person'. It has access to Opportunities and Cases. The 'Role Detail' section also notes that users in this role can edit all opportunities and cases associated with accounts they own. Below this, a sub-section titled 'Users in sales person Role' shows no records displayed. There are buttons for 'Assign Users to Role' and 'New User'. A help link 'Users in sales person Role Help' is also present.

Search



ENG IN 16-11-2024 22:40

Users

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

Create User

1. Go to setup >> type users in quick find box >> select users >> click New user.

2. Fill in the fields

a. First Name : Niklas

b. Last Name : Mikaelson

c. Alias : Give a Alias Name

d. Email id : Give your Personal Email id

e. Username : Username should be in this form: text@text.text

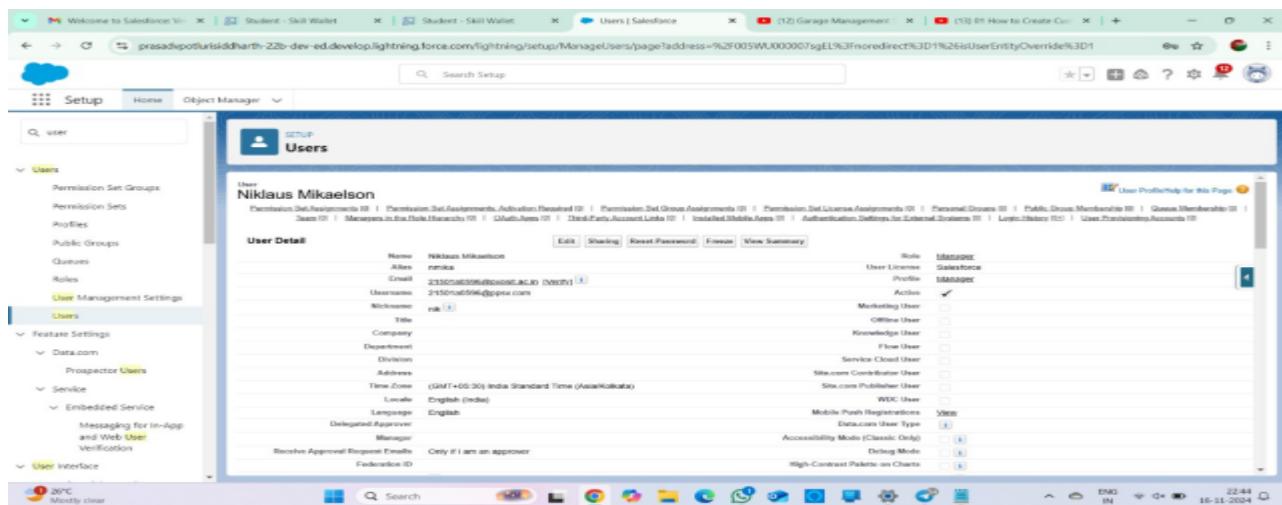
f. Nick Name : Give a Nickname

g. Role : Manager

h. User licence : Salesforce

i. Profiles : Manager

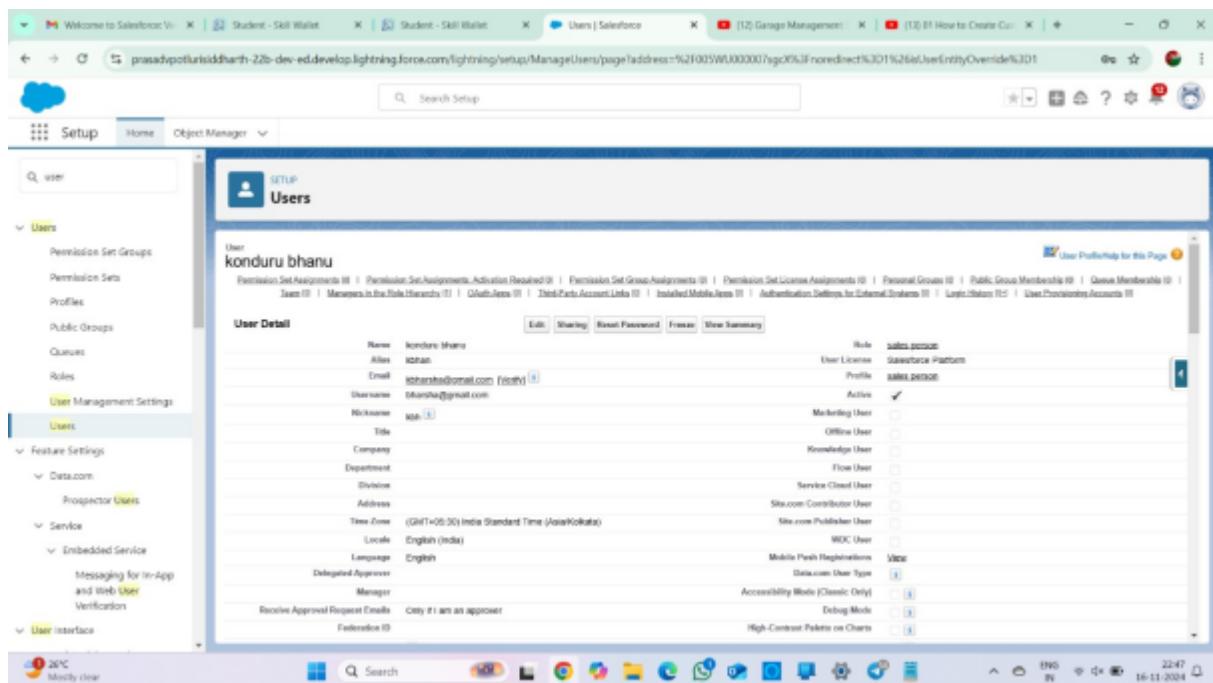
3. Save



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 at least three users with these permissions.

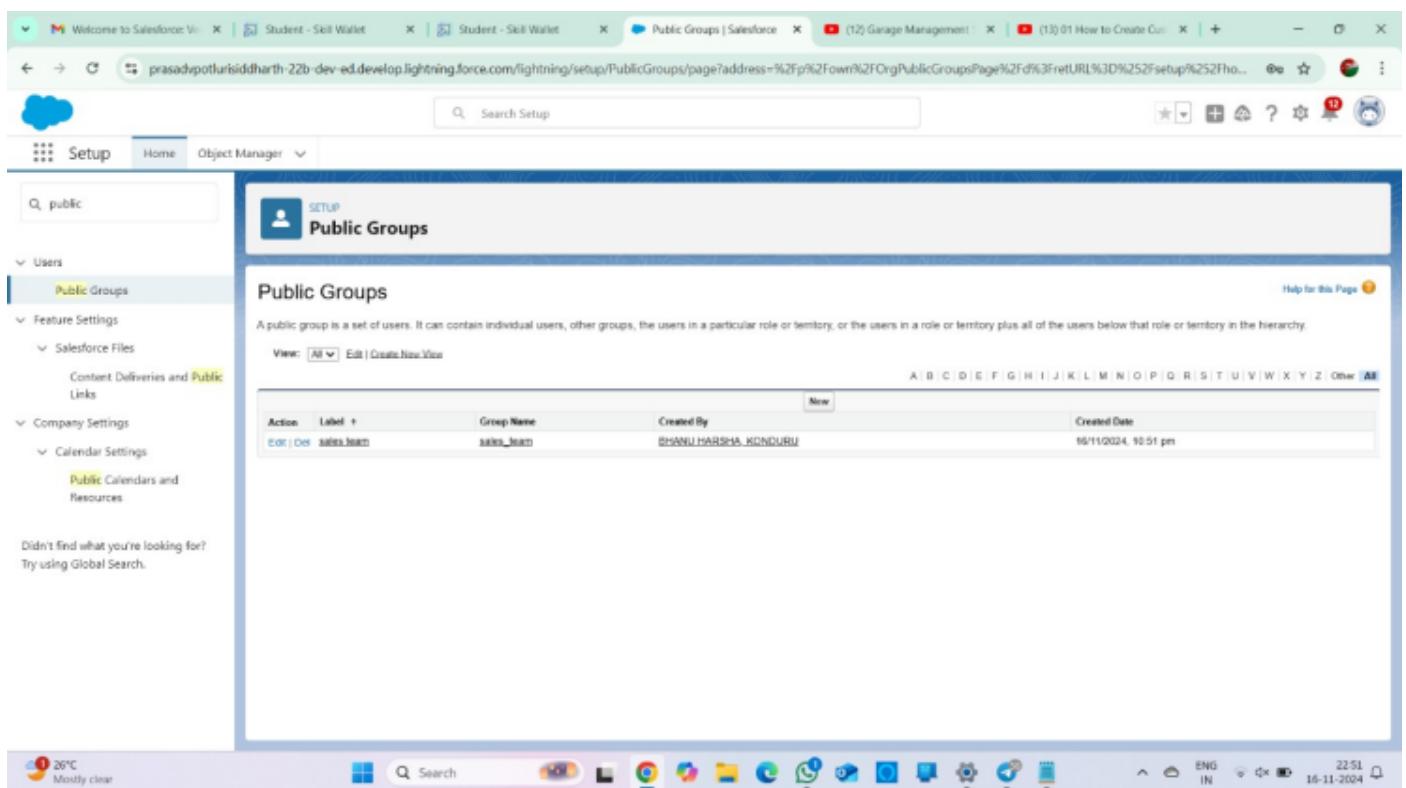


Public groups

Public groups are a valuable tool for Salesforce agents and builders to streamline user management, data access, and protection settings. By creating and using public groups, in effect, you can maintain a secure and organized Salesforce environment while ensuring that users have suitable access to the resources they need.

Creating New Public Group

1. Go to setup >> type users in quick find box >> select public groups >> click New.
2. Give the Label as "sales team".
3. Group name is auto filled.
4. Search for Roles.
5. In Ready Members, select Salesperson and click Add; it will move to the selected members. Click on save.



The screenshot shows the Salesforce Setup interface with the 'Public Groups' page open. The left sidebar shows navigation options like Home, Object Manager, and various system settings. The main content area displays the 'Public Groups' section with a sub-section titled 'Public Groups'. A table lists one group entry:

Action	Label	Group Name	Created By	Created Date
Edit / Del	sales_team	sales_team	RHANU HARSHA KONDURU	16/11/2024, 10:51 pm

A message at the bottom left says, "Didn't find what you're looking for? Try using Global Search." The bottom of the screen shows the Windows taskbar with various icons and the date/time: 16-11-2024, 22:51.

Sharing Setting

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

System-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 sharedwith users lower in the hierarchy.

The role hierarchy is often used in compounding with OWD settings to grant different levels ofaccess.

Profiles and Permission Sets:

Profiles and permission sets allow run to specify object-level and field-levelpermissions for users.

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

Creating Sharing settings

1. Go to setup >> type users in quick find box >> select Sharing Settings >> click Edit.
2. Change the OWD setting of the Service records Object to private as shown in fig.
3. Click on save and refresh.
4. Scroll down a bit, Click new on Service records sharing Rules.
5. Give the Label name as " Sharing setting"
6. Rule name is auto filled.
7. In step 3: Select which records to be shared; members of " Roles " >> " Sales person"
8. In step 4: share with, select " Roles " >> " Manager "
9. In step 5: Change the access level to " Read / write ".

- 10.Click on save.

Welcome to Salesforce: prasadvpoturisiddharth-22b-dev-ed.lightning.force.com/lightning/setup/SecuritySharing/page?address=%2Fp%2Fown%2FOrgSharingDetail%3Fr?url%3D%252Fsetup%252Fhome%26appLay... (13) 01 How to Create Cus...

Setup Home

Service Setup Assistant

Commerce Setup Assistant

Hyperforce Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer

Sales Cloud Everywhere

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

> Subscription Management

Cloud 26°C Mostly clear

Search Setup

Quick Find

Sharing Settings

No sharing rules specified.

Work Type Sharing Rules New Recalculate Work Type Sharing Rules Help

No sharing rules specified.

Work Type Group Sharing Rules New Recalculate Work Type Group Sharing Rules Help

No sharing rules specified.

Appointment Sharing Rules New Recalculate Appointment Sharing Rules Help

No sharing rules specified.

Billing details and feedback Sharing Rules New Recalculate Billing details and feedback Sharing Rules Help

No sharing rules specified.

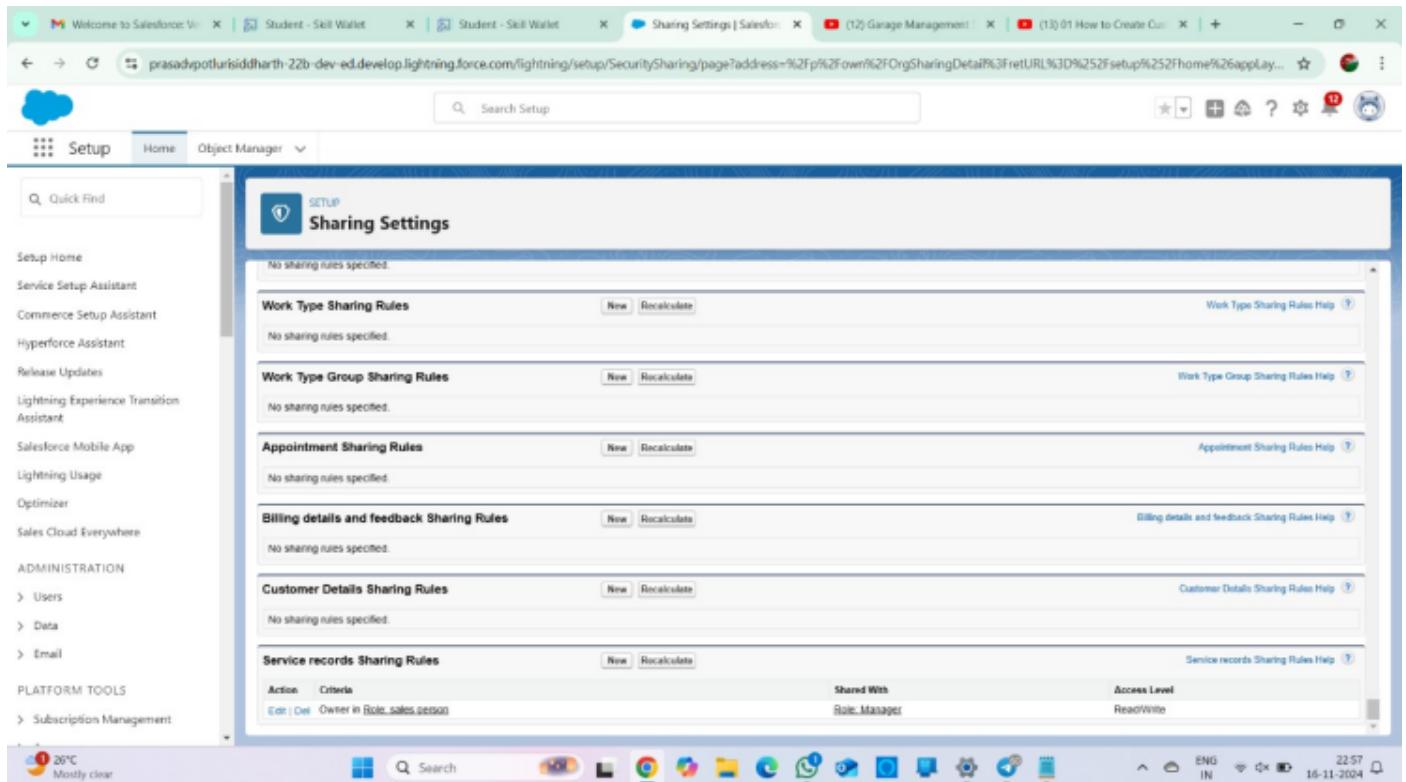
Customer Details Sharing Rules New Recalculate Customer Details Sharing Rules Help

No sharing rules specified.

Service records Sharing Rules New Recalculate Service records Sharing Rules Help

Action	Criteria	Shared With	Access Level
Edit Del	Owner In Role: salesperson	Role: Manager	ReadWrite

22:57 ENG IN 16-11-2024



Flows

Create a Flow

1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the NewFlow.
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 "Trigger Flow when: A record is created or updated."
5. Select the Optimize the flow for: "Actions and Related Records" and Click on Done.
6. Under the Record-triggered Flow, click on the "+" Symbol, and In the Drop List, select the "Update records Element". Give the Label Name : Amount Update
7. Api name : is auto filled
8. Set a filter condition : All Conditions are met(AND)
9. Field : Payment_Status_c
10. hustler : Equals
11. Value : Completed
12. Moreover, Set Field Values for the Billing details and feedback Record
13. Field : Payment_Paid_c
14. Value : {!\$Record.Service_records_r.Appointment_r.Service_Amount_c}
15. Click On Done. Before creating another Element. Create a New Resource from Toolbox form top left.
16. Click on the New Resource, And select Value.
17. Select the resource type as text template.
18. Enter the API name as " alert".
19. Change the view to Rich Text? View to Plain Text.
20. In body field paste the syntax that given below.

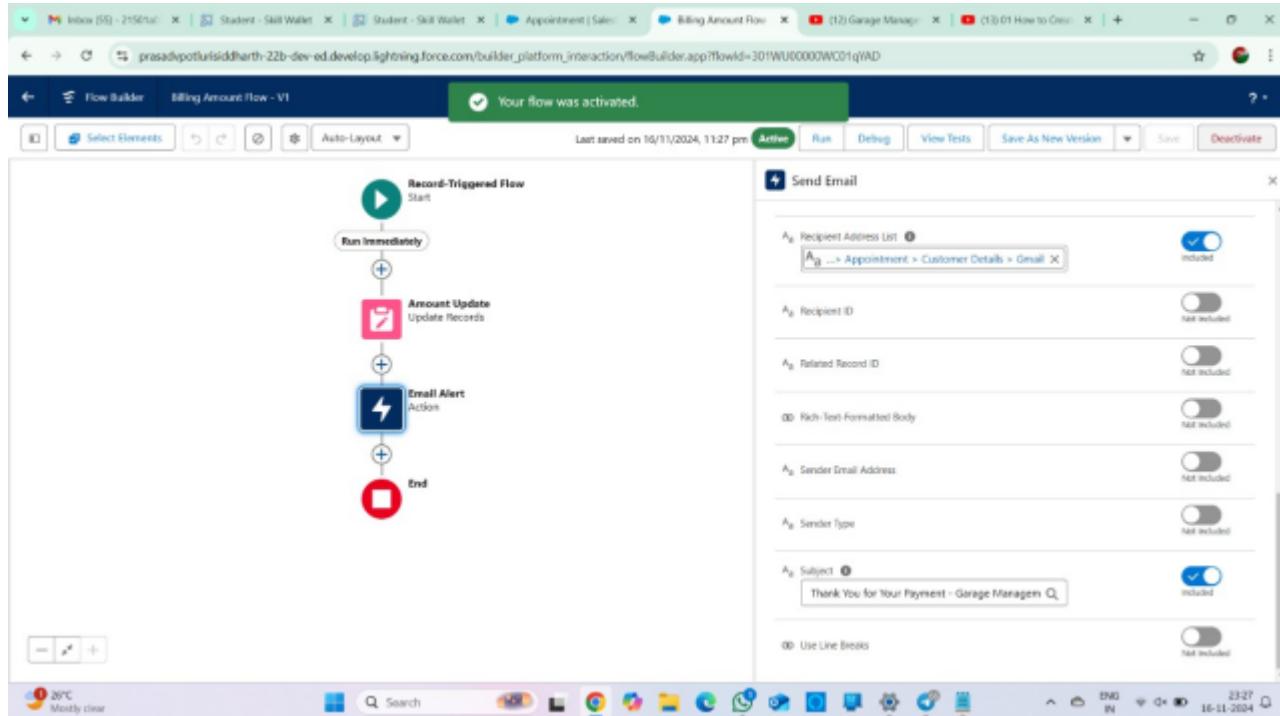
Dear {!\$Record.Service_records_r.Appointment_r.Customer_Name_r.Name},

I hope this message finds you well. I wanted to take a moment to express my sinceregratitude for your recent payment for the services provided by our garage management team. Your prompt payment is greatly pleasing, 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.

1. Click done.
2. Now Click on Add Element, select Action.
3. Their action bar will open, where they can search for "send email" and click it. Give the label name as "Email Alert"
4. API name will be auto filled.
5. Enable the body to set input values for the selected action.
6. Select the text template that created, Body : {!alert}
7. Include the receiver address list and select the email from the record.
8. RecipientAddressList:
{\$Record.Service_records_r.Appointment_r.Customer_Name__r.Gmail__c}
9. Include subject as " Thank You for Your Payment - Garage Management".
10. Click done.
11. Click on save. Give the Flow label; the Flow Api name will be auto filled.
Moreover, click save, and click on activate.



Apex Trigger

You can invoke Apex 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 plans:

1. insert
2. update
3. delete
4. merge
5. up sort
6. undelete

For example, a trigger can run before an object's records are inserted, after records are deleted, or 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 in the main two types of Apex Triggers:

Before Trigger: This trigger type in Salesforce is used to update or validate record values before saving them into the database. So, au fond, the before trigger validates the record first and then saves it. Some standard features or code can be set to check data before it is inserted into the database.

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

Apex handler

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

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

Code:

```
public class AmountDistributionHandler {  
  
    public static void amountDist(list<Appointment_c> listApp){  
        list<Service_records_c> serList = new list <Service_records_c>();  
        for(Appointment_c app : listApp){  
            if(app.Maintenance_service_c == true && app.Repairs_c == true && app.Replacement_Parts_c ==  
true){  
                app.Service_Amount_c = 10000;  
            }  
            else if(app.Maintenance_service_c == true && app.Repairs_c == true){app.Service_Amount_c =  
5000;  
            }  
  
            else if(app.Maintenance_service_c == true && app.Replacement_Parts_c == true){  
                app.Service_Amount_c = 8000;  
            }  
            else if(app.Repairs_c == true && app.Replacement_Parts_c == true){app.Service_Amount_c =  
7000;  
            }  
            else if(app.Maintenance_service_c == true){app.Service_Amount_c =  
2000;  
            }  
            else if(app.Repairs_c == true){ app.Service_Amount_c =  
3000;  
            }  
            else if(app.Replacement_Parts_c == true){app.Service_Amount_c =  
5000;  
            }  
        }  
    }  
}
```

Trigger Handler :

How to create a new trigger :

1. While still in the trailhead account, navigate to the gear icon in the top right corner.
2. Click on the Builder Console, and you will be directed to a new console window.
3. Click on File menu in the toolbar, and click on new? Trigger.
4. Enter the trigger name and select the object to be triggered.
5. Name : AmountDistribution
6. sObject : Appointment_c

Syntax For creating trigger :

The syntax for creating trigger is :

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

```
{  
}  
}
```

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

Code:

```
trigger AmountDistribution on Appointment_c (before insert, before update) {if(trigger.isbefore &&  
trigger.isinsert || trigger.isupdate){  
    AmountDistributionHandler.amountDist(trigger.new);  
}  
}
```

Developer Console - Google Chrome

prasadvpotlurisiddharth-22b-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >

AmountDistributionHandler.apxc AmountDistribution.apxt

Code Coverage: None API Version: 62 Go To

```
1 trigger AmountDistribution on Appointment__c (before insert, before update) {
2
3
4
5     if(trigger.isbefore && trigger.isinsert || trigger.isupdate){
6
7         AmountDistributionHandler.amountDist(trigger.new);
8
9
10    }
11
12
13
14 }
```

Reports

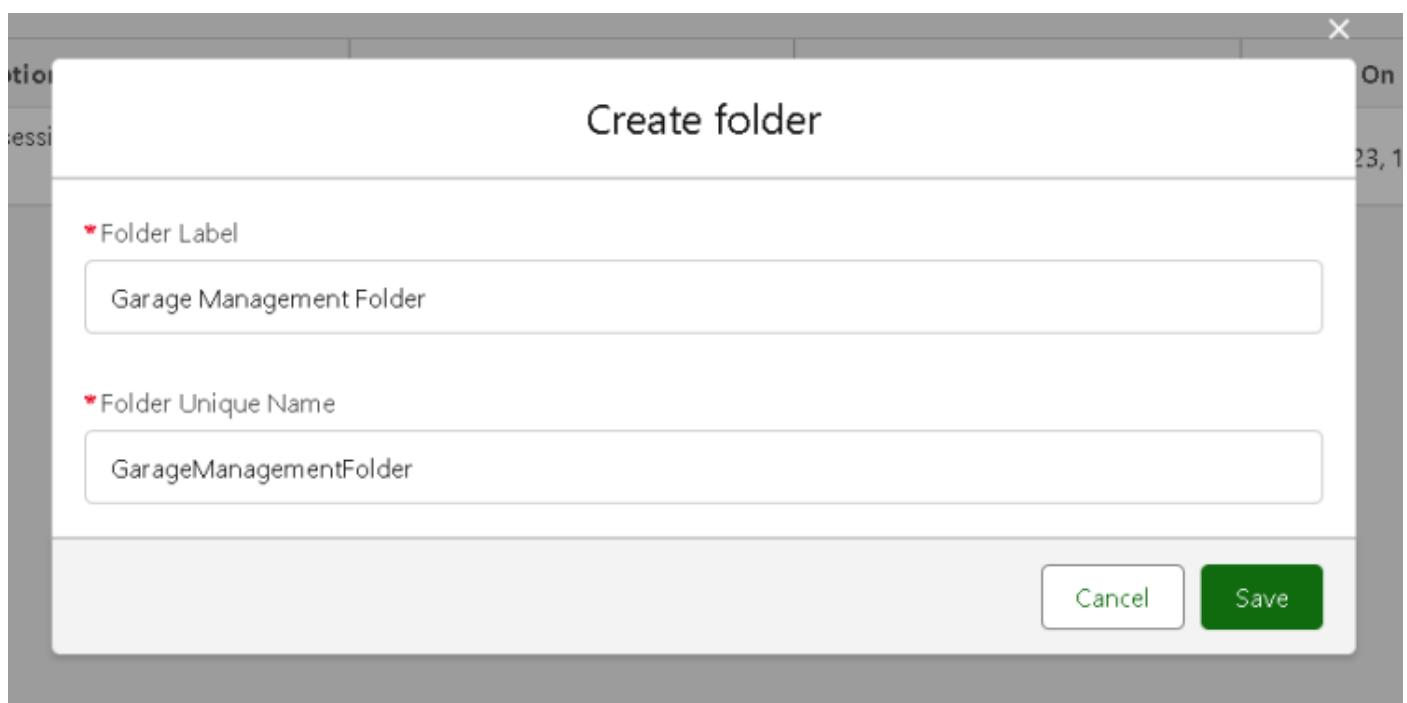
Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combining, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

Types of Reports in Salesforce

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

create a report folder

1. Click on the app launcher and search for reports.
2. Click on the report tab, click on a new folder.
3. Give the Folder label as "Garage Management Folder", Folder unique name will be auto filled.
4. Click save.



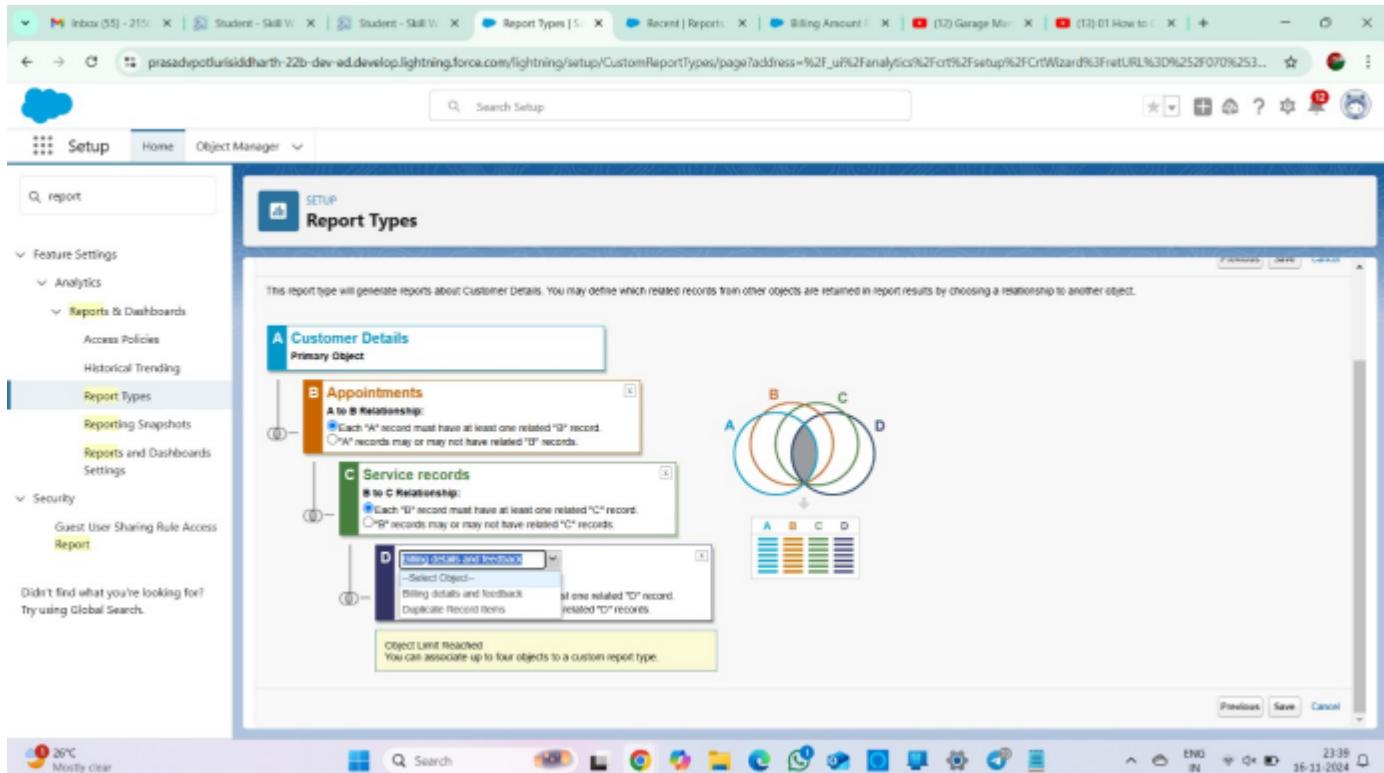
Sharing a report folder

1. Go to the app >> click on the reports tab.

2. Click on the All folder, click on the Drop arrow for the Garage Management folder, and Click on share.
3. Select the share with as "roles", in name field search for "manager", give "view" access for that role.
4. Then click share, and click on Done.

Create Report Type

1. Go to setup >> type users in quick find box >> select Report Type >> click on Continue.
2. Click on a new custom report type.
3. Select the Primary object as "Customer details".
4. Give the Report type Label as "Service data"
5. Report type Name is auto filled.
6. Keep the Description as the same.
7. Select Store in family as "other Reports"
8. Select the deployment status as "Deployed", click on Next.
9. now, Click on Related object box.
10. Click on Select Object, choose Appointment Object as shown in fig
11. Again, Click to relate another object.
12. Also, select the related object as "service records".
13. Repeat the process and select the related object as "Billing details and feedback".
14. Also, click on say

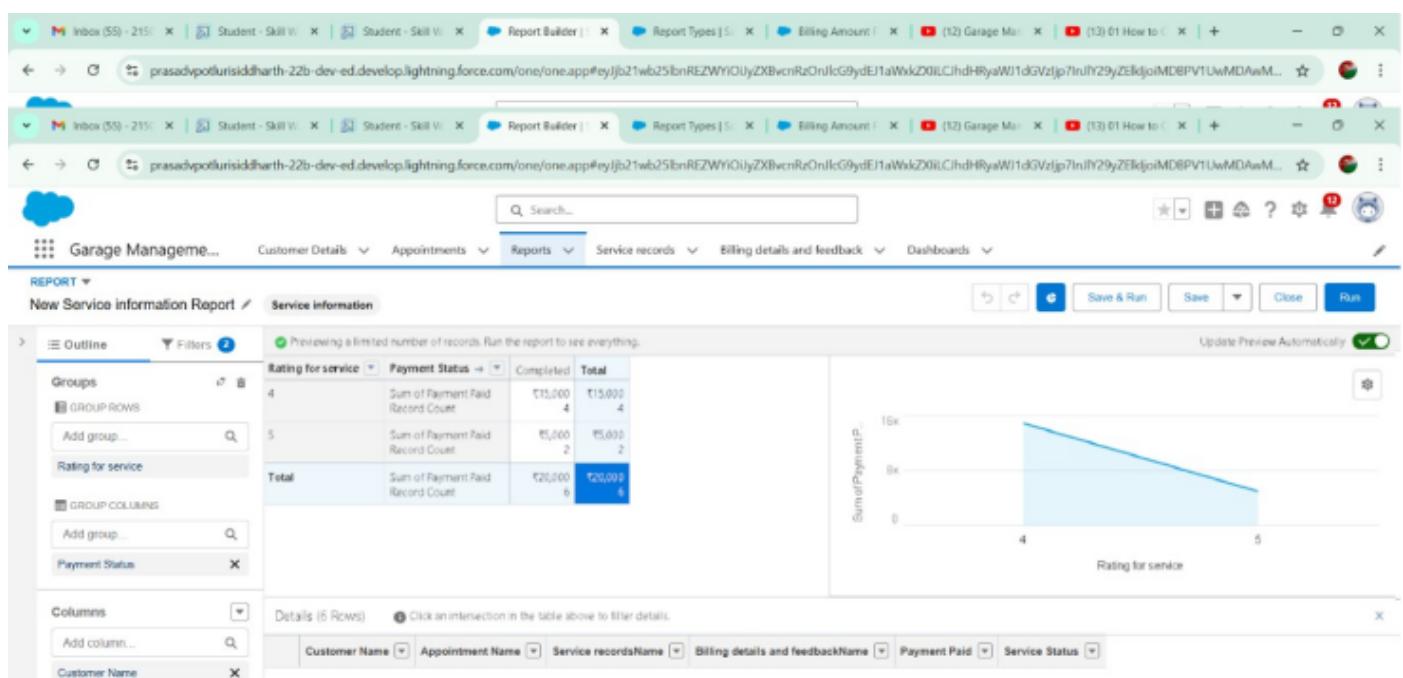


Create Report

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

1. Go to the app >> click on the reports tab
2. Click New Report.
3. Select the family as other reports, search for Service data, select that report, click on it And click on start report.
4. Their outline pane is opened already, select the fields that mentioned below in column section.
 - a. Customer name
 - b. Appointment Date
 - c. Service Status
 - d. Payment paid
 - e. Remove the fields.
 - f. Select the fields that mentioned below in GROUP ROWS section.
 - i. Rating for Service
 - g. Select the fields that mentioned below in GROUP ROWS section.
 - i. Payment Status

- h. Click on Add Chart, Select the Line Chart.
- i. Click on save, Give the report Name : New Service data Report
- j. Report unique Name is auto filled.
5. Select the folder the created and Click on save.



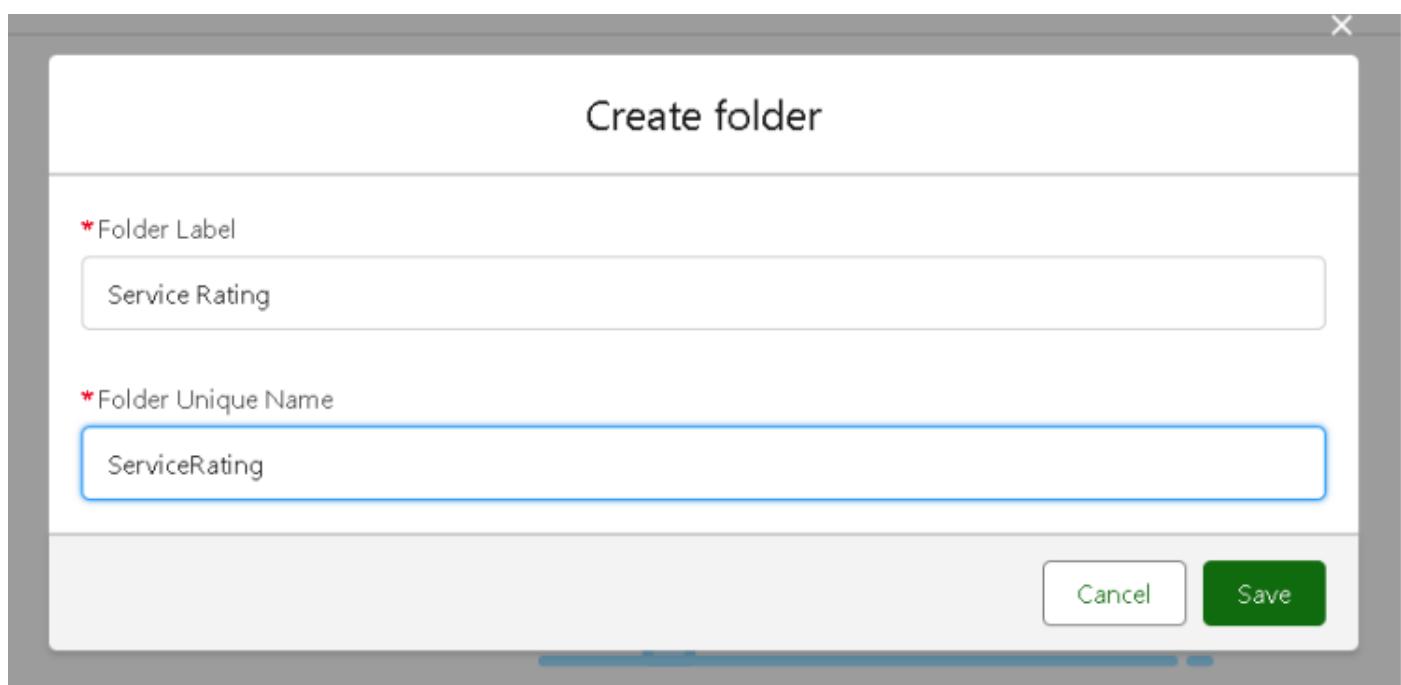
Dashboards

Dashboards help you clearly understand changing business conditions so you can make decisions based on the real-time data you have gathered with reports. Use dashboards to help users discover trends, resolve quantities, and measure the impact of their action.

Create Dashboard Folder

1. Click on the app launcher and search for dashboard.
2. Click on the dashboard tab.
3. Click new folder, give the folder label as "Service Rating dashboard".
4. Folder unique name will be auto filled.
5. Click save.

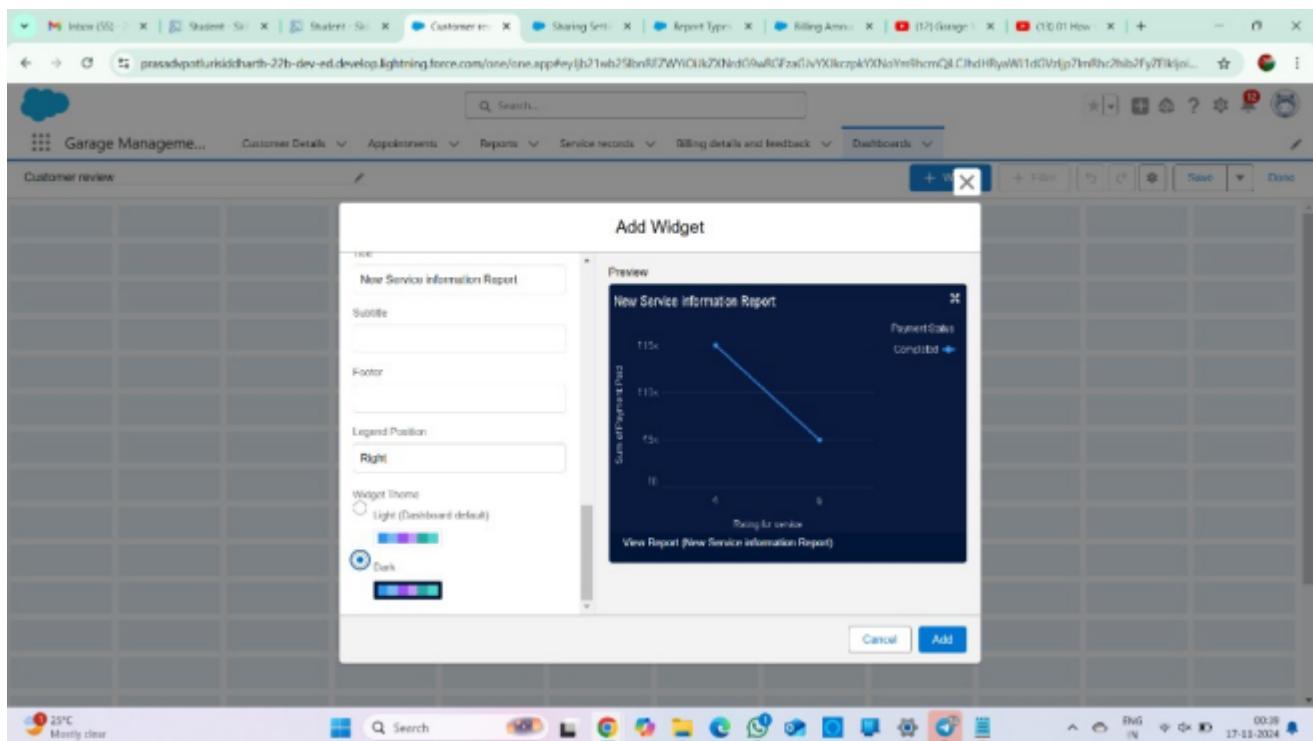
Follow the same steps, from milestone 15, and action 2, and provide the sharing settings for the folder that just created.



Create Dashboard

1. Go to the app >> click on the Dashboard tabs.
2. Enter a name, select the folder that was created, and click Create.

3. Select add component.
4. Select a Report and click on select.
5. Select the Line Chart. Change the theme.
6. Click Add, then click on Save, and then click on Done.
7. Preview is shown below.



Subscription:

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

Edit Subscription

Schedule dashboard refreshes and subscribe to receive results.

Settings

Frequency

Daily Weekly Monthly

Days

Sun Mon Tue Wed Thu Fri Sat

Time

3:00 pm

Recipients

Screenshot of a Salesforce Lightning interface showing a customer review report.

The top navigation bar includes tabs for Inbox, Student - Sk, Student - Sli, Customer rev., Sharing Setti., Report Type, Billing Amou., (12) Garage, (13) 01 How, and a new tab. The URL is prasadpoturisiddharth-22b-dev-ed.lightning.force.com/one/one.app#eyJjb21wb25lbnREZWYiOlkZXNirdG9wRGFzaGivYXJkczpkyXNoYm9hcmQjLCihdHryaWJ1dGVzIjp7ImRhc2hb2FyZElkjo... .

The main header shows a cloud icon, the title "Customer Management", and a search bar. Below the header are navigation links: Customer Details, Appointments, Reports, Service records, Billing details and feedback, and Dashboards. On the right are refresh, edit, and subscribe buttons.

The dashboard section is titled "Customer review" and displays the following information:

- New Service information Report**
- Payment status:** Completed
- Rating for service:** 4
- Amount of Payment paid:** ₹150
- View Report (New Service information Report)**

The bottom of the screen shows the Windows taskbar with various pinned icons (File Explorer, Google Chrome, Microsoft Edge, etc.) and system status indicators (weather, battery, date/time).