

Garage Management system

The Garage Management System is a valuable tool for automotive repair facilities, helping them deliver top-notch service, increase operational efficiency, and build lasting customer relationships. With its user-friendly interface and powerful features, GMS empowers garages to thrive in a competitive market while ensuring a seamless and satisfying experience for both customers and staff. The **Garage Management System (GMS)** is a comprehensive software solution designed to streamline and optimize the operations of automotive repair facilities, service centers, 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 satisfaction.

- **Appointment Scheduling:**

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

- **Vehicle Management:**

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

- **Customer Relationship Management (CRM):**

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

- **Inventory and Spare Parts Management:**

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

- **Billing and Invoicing:**

- Generates professional invoices quickly and accurately.
- Supports multiple payment methods, discounts, and tax calculations.

- **Work Order Management:**

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

- **Reporting and Analytics:**

- Provides insights into key performance indicators like revenue, job completion rates, and customer feedback.

- Helps identify trends and areas for improvement.

Salesforce

Introduction:

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

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

What Is Salesforce?

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

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

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

<https://youtu.be/r9EX3lGde5k>

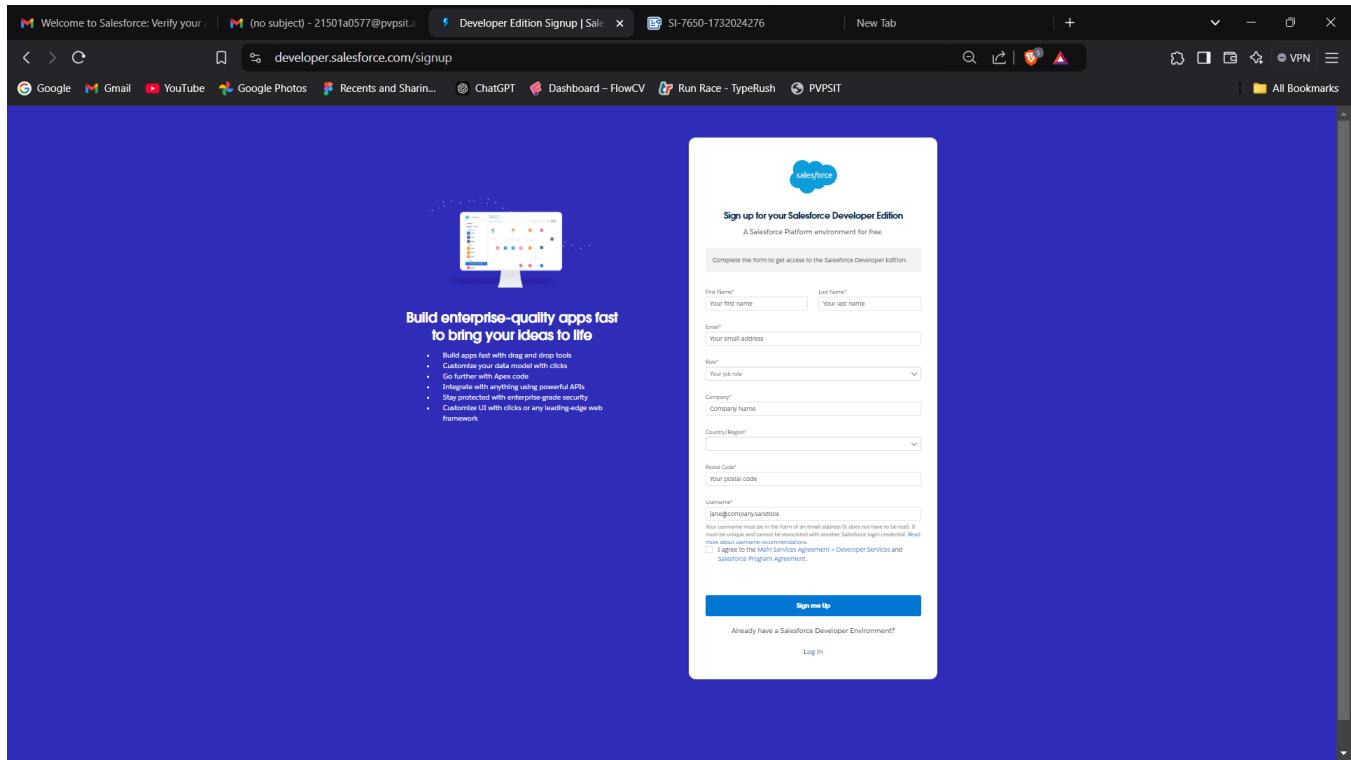
Creating Developer Account:

Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :
 1. First name & Last name
 2. Email
 3. Role : Developer
 4. Company : College Name
 5. County : India
 6. Postal Code : pin code
 7. Username : should be a combination of your name and company

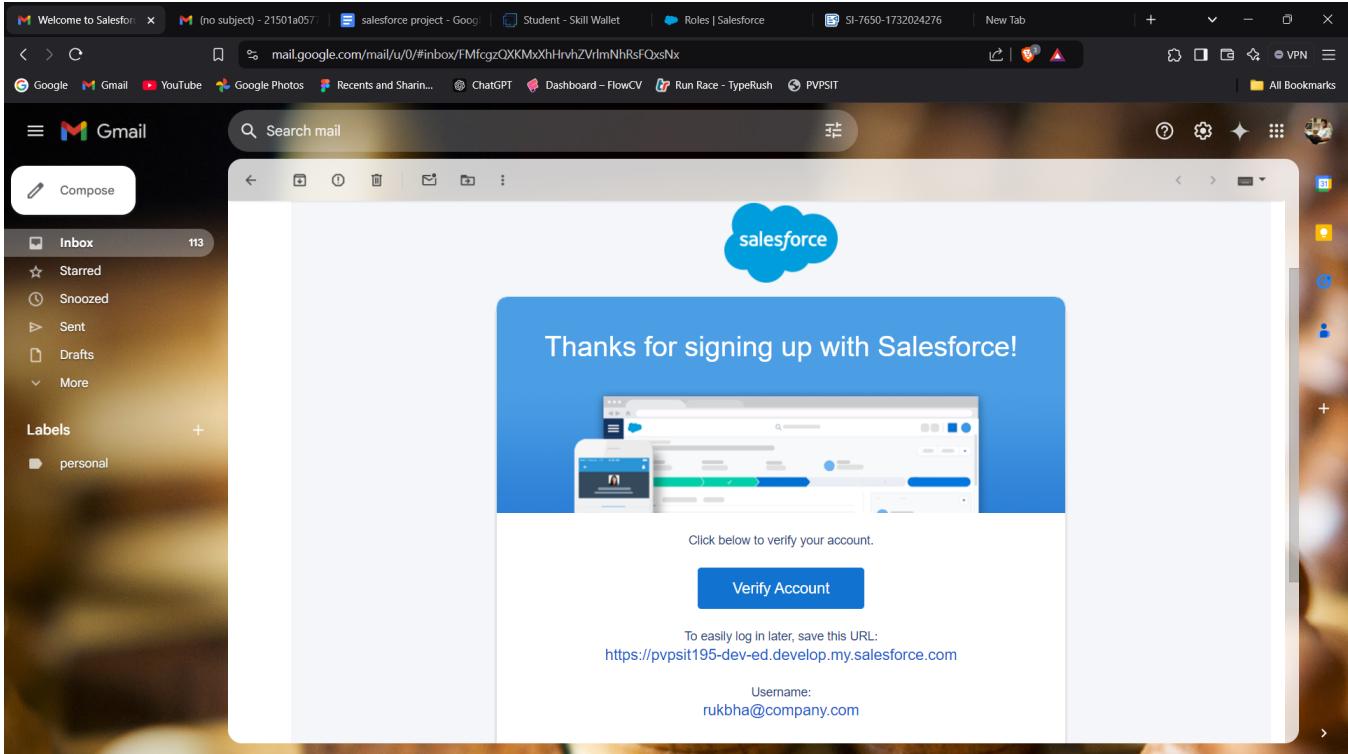
This need not be an actual email id, you can give anything in the format : username@organization.com

Click on sign me up after filling these.



Account Activation

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



OBJECT

What Is an Object?

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

Salesforce objects are of two types:

1. **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. **Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

Create Customer DetailsObject

To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
1. Enter the label name >> Customer Details
2. Plural label name >> Customer Details
3. Enter Record Name Label and Format
 - Record Name >> Customer Name

- Data Type >> Text
2. Click on Allow reports and Track Field History,
 3. Allow search >> Save.

Create Appointment Object

To create an object:

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

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. [Learn more](#) [Don't show this message again](#)

Custom Object Definition Edit

Custom Object Information

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

| | | |
|--------------------------|--------------------------|-------------------|
| Label: | Appointment | Example: Account |
| Plural Label: | Appointments | Example: Accounts |
| Starts with vowel sound: | <input type="checkbox"/> | |

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

| | | |
|--------------|-------------|------------------|
| Object Name: | Appointment | Example: Account |
|--------------|-------------|------------------|

Description:

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

Content Name: [None...](#)

Enter Record Name Label and Format

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

| | | |
|--------------|------------------|-----------------------|
| Record Name: | Appointment Name | Example: Account Name |
|--------------|------------------|-----------------------|

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

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

Starting Number: 1

Optional Features

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

Object Classification

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

Allow Sharing
 Allow Bulk API Access
 Allow Streaming API Access

Deployment Status

In Development
 Deployed

Search Status

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

Allow Search

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

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

Buttons: Save, Save & New, Cancel

Create Service records Object

To create an object:

- From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
- Enter the label name >> Service records
- Plural label name >> Service records
- Enter Record Name Label and Format
 - Record Name >>Service records Name
 - Data Type >> Auto Number
 - Display Format >> ser-{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](#) [Don't show this message again](#)

Custom Object Definition Edit

Custom Object Information

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

| | |
|-------------------------|--|
| Label | <input type="text" value="Service records"/> Example: Account |
| Plural Label | <input type="text" value="Service records"/> Example: Accounts |
| Starts with vowel sound | <input type="checkbox"/> |

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

| | |
|-------------|---|
| Object Name | <input type="text" value="Service_records"/> Example: Account |
|-------------|---|

Description

Context-Sensitive Help Setting

| |
|--|
| <input checked="" type="radio"/> Open the standard Salesforce.com Help & Training window |
| <input type="radio"/> Open a window using a Visualforce page |

Content Name

None

Enter Record Name Label and Format

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

| | |
|-----------------|---|
| Record Name | <input type="text" value="Service recordsName"/> Example: Account Name |
| Date Type | <input type="button" value="Auto Number"/> Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type. |
| Display Format | <input type="text" value="ser-{000}"/> Example: A-{0000} What Is This? |
| Starting Number | <input type="text" value="1"/> |

Optional Features

Allow Reports
 Allow Activities
 Track Field History
 Allow in Chatter Groups
 Enable Licensing [Learn more](#)

Object Classification

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

Allow Sharing
 Allow Bulk API Access
 Allow Streaming API Access

Deployment Status

In Development
 Deployed

Search Status

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

Allow Search

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

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

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

Create Billing details and feedback Object

To create an object:

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

New Custom Object

Permissions for this object are disabled for all profiles by default. You can enable object permissions in permission sets or by editing custom profiles. [Tell me more](#) [Don't show this message again](#)

Custom Object Definition Edit

Custom Object Information

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

| | | |
|-------------------------|---|-------------------|
| Label | <input type="text" value="Billing details and feedback"/> | Example: Account |
| Plural Label | <input type="text" value="Billing details and feedback"/> | Example: Accounts |
| Starts with vowel sound | <input type="checkbox"/> | |

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

| | | |
|-------------|---|------------------|
| Object Name | <input type="text" value="Billing_details_and_feedback"/> | Example: Account |
|-------------|---|------------------|

Description

Content-Sensitive Help Setting

| |
|--|
| <input checked="" type="radio"/> Open the standard Salesforce.com Help & Training window |
| <input type="radio"/> 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 | <input type="text" value="Billing details and feedback"/> | Example: Account Name |
| Date Type | <input type="text" value="Auto Number"/> | Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type. |
| Display Format | <input type="text" value="Bill-(000)"/> | Example: A-00000 What Is This? |
| Starting Number | <input type="text" value="1"/> | |

Optional Features

| |
|---|
| <input checked="" type="checkbox"/> Allow Reports |
| <input type="checkbox"/> Allow Activities |
| <input checked="" type="checkbox"/> Track Field History |
| <input type="checkbox"/> Allow in Chatter Groups |
| <input type="checkbox"/> 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](#).

| |
|--|
| <input checked="" type="checkbox"/> Allow Sharing |
| <input checked="" type="checkbox"/> Allow Bulk API Access |
| <input checked="" type="checkbox"/> Allow Streaming API Access |

Deployment Status

| |
|---|
| <input type="radio"/> In Development |
| <input checked="" type="radio"/> Deployed |

Search Status

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

| |
|--|
| <input checked="" type="checkbox"/> Allow Search |
|--|

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

| |
|--|
| <input type="checkbox"/> Add Notes and Attachments related list to default page layout |
| <input type="checkbox"/> Launch New Custom Tab Wizard after saving this custom object |

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

Tabs

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

Types of Tabs:

1. Custom Tabs

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

2. Web Tabs

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

3. Visual-force Tabs

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

4. Lightning Component Tabs

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

5. Lightning Page Tabs

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

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

Creating a Custom Tab

To create a Tab:(Customer Details)

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

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 .

| Action | Label | Tab Style | Description |
|------------|------------------------------|-----------|-------------|
| Edit Del | Appointments | Bank | |
| Edit Del | Billing details and feedback | Books | |
| Edit Del | Customer Details | Airplane | |
| Edit Del | Service records | Building | |

The Lightning App

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

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

Create a Lightning App

To create a lightning app page:

1. Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App.
2. Fill the app name in app details as Garage Management Application >> Next >> (App option page) keep it as default >> Next >> (Utility Items) keep it as default >> Next.
3. To Add Navigation Items:
4. Select the items (Customer Details, Appointments, Service records, Billing details and feedback, Reports and Dashboards) from the search bar and move it using the arrow button >> Next.
5. To Add User Profiles: Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.

The screenshot shows the Salesforce App Manager interface. At the top, there's a navigation bar with links like 'Setup', 'Home', and 'Object Manager'. Below the navigation bar is a search bar with the placeholder 'Search Setup...'. The main content area is titled 'Lightning Experience App Manager' and displays a table of 24 items. The table has columns for 'App Name', 'Developer Name', 'Description', 'Last Modified ...', 'Ap...', and 'Vi...'. The 'App Name' column is sorted in ascending order. The table lists various Salesforce applications such as 'All Tabs', 'Analytics Studio', 'App Launcher', 'Automation', etc. Each row includes a small icon and a dropdown arrow.

| App Name ↑ | Developer Name | Description | Last Modified ... | Ap... | Vi... |
|----------------------------------|-------------------------------|---|----------------------|-----------|-------|
| 1 All Tabs | AllTabSet | | 18/11/2024, 9:44 am | Classic | ▼ |
| 2 Analytics Studio | Insights | Build CRM Analytics dashboards and apps | 18/11/2024, 9:44 am | Classic | ▼ |
| 3 App Launcher | AppLauncher | App Launcher tabs | 18/11/2024, 9:44 am | Classic | ▼ |
| 4 Automation | FlowsApp | Automate business processes and repetitive tasks. | 18/11/2024, 9:52 am | Lightning | ▼ |
| 5 Bolt Solutions | LightningBolt | Discover and manage business solutions designed for your industry. | 18/11/2024, 9:48 am | Lightning | ▼ |
| 6 Business Rules Engine | ExpressionSetConsole | Create and maintain business rules that perform complex lookups and ca... | 18/11/2024, 9:44 am | Lightning | ▼ |
| 7 Community | Community | Salesforce CRM Communities | 18/11/2024, 9:44 am | Classic | ▼ |
| 8 Content | Content | Salesforce CRM Content | 18/11/2024, 9:44 am | Classic | ▼ |
| 9 Data Manager | DataManager | Use Data Manager to view limits, monitor usage, and manage recipes. | 18/11/2024, 9:44 am | Lightning | ▼ |
| 10 Digital Experiences | SalesforceCMS | Manage content and media for all of your sites. | 18/11/2024, 9:44 am | Lightning | ▼ |
| 11 Garage Management Application | Garage_Management_Application | | 18/11/2024, 10:42 am | Lightning | ▼ |
| 12 Lightning Usage App | LightningInstrumentation | View Adoption and Usage Metrics for Lightning Experience | 18/11/2024, 9:44 am | Lightning | ▼ |
| 13 Marketing CRM Classic | Marketing | Track sales and marketing efforts with CRM objects. | 18/11/2024, 9:44 am | Classic | ▼ |
| 14 Platform | Platform | The fundamental Lightning Platform | 18/11/2024, 9:44 am | Classic | ▼ |

Fields

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

Types of Fields

1. Standard Fields
2. Custom Fields

Creation of fields for the Customer Details object

1. To create fields in an object:

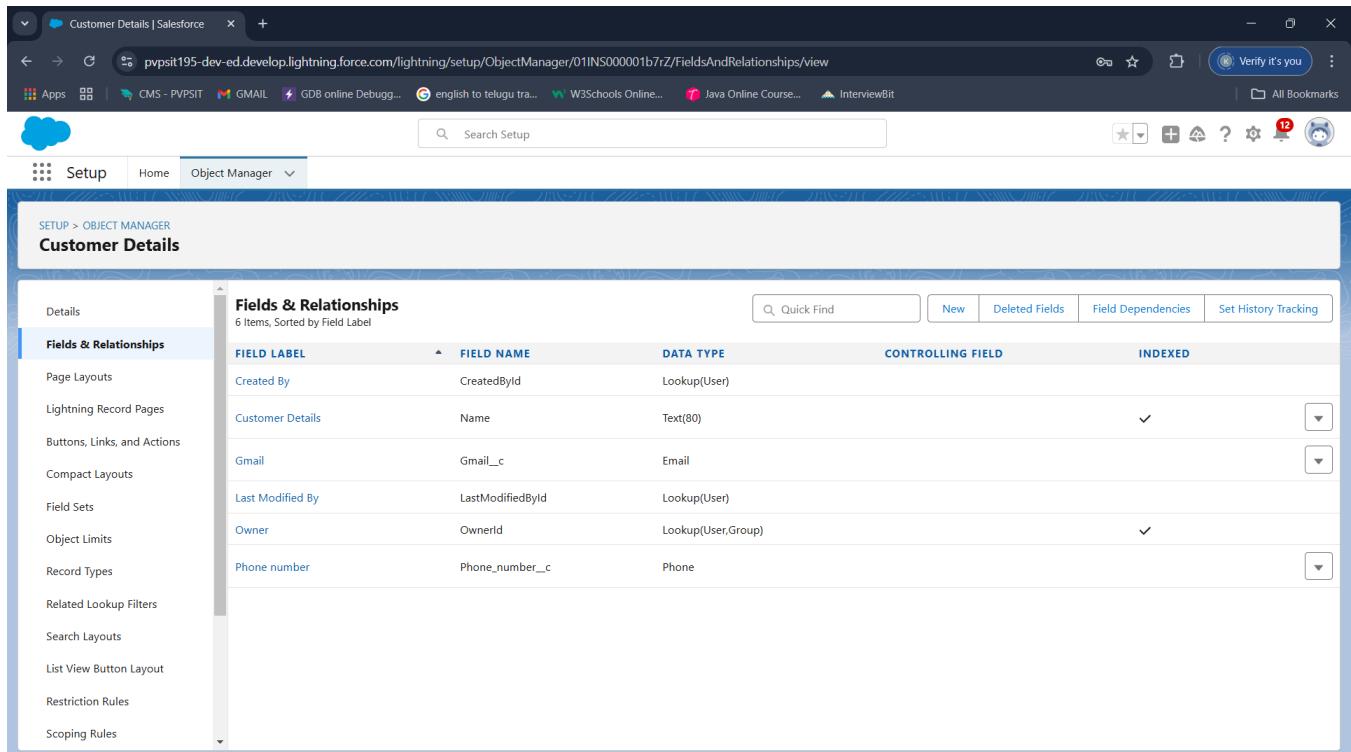
1. Go to setup >> click on Object Manager >> type object name(Customer Details) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data Type as a “Phone”
4. Click on next.
5. Fill the Above as following:
 - Field Label: Phone number

- Field Name : gets auto generated
- Click on Next >> Next >> Save and new.

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

2. To create another fields in an object:

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



The screenshot shows the Salesforce Object Manager interface for the 'Customer Details' object. On the left, there's a sidebar with various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main area is titled 'Fields & Relationships' and lists six items. The fields are:

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|------------------|------------------|--------------------|-------------------|---------|
| Created By | CreatedById | Lookup(User) | | |
| Customer Details | 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 & Relationships” >> New
3. Select “Look-up relationship” as data type and click Next.
4. Select the related object “ Customer Details” and click next.
5. Next >> Next >> Save.

Note: Make sure you complete Activity 4 Before continuing.

The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** Appointment | Salesforce
- Search Bar:** Search Setup
- Navigation:** Home, Object Manager
- Breadcrumb:** SETUP > OBJECT MANAGER
- Section:** Appointment
- Left Sidebar:** Details, Fields & Relationships (selected), 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.
- Table:** Fields & Relationships (12 Items, Sorted by Field Label)

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|---------------------|-----------------------|--------------------------|-------------------|---------|
| Appointment | Appointment_c | Lookup(Appointment) | | ✓ |
| Appointment Date | Appointment_Date_c | Date | | ▼ |
| Appointment Name | Name | Auto Number | | ✓ |
| Created By | CreatedBy | Lookup(User) | | ▼ |
| Customer Details | Customer_Details_c | Lookup(Customer Details) | | ✓ |
| Last Modified By | LastModifiedBy | Lookup(User) | | ▼ |
| Maintenance service | Maintenance_service_c | Checkbox | | ▼ |
| Owner | OwnerId | Lookup(User,Group) | | ✓ |
| Repairs | Repairs_c | Checkbox | | ▼ |
| Replacement Parts | Replacement_Parts_c | Checkbox | | ▼ |

Creation of Lookup Field on Service records Object :

1. Go to setup >> click on Object Manager >> type object name(Service records) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select “Look-up relationship” as data type and click Next.
4. Select the related object “ Appointment ” and click next.
5. Make it a required field so click on Required.
6. Scroll down for Lookup Filter and click on Show filter settings.

7. Now add the filter criteria.
8. Field : Appointment: Appointment Date >> Operator : less than >> select field >> Appointment: Created Date
9. Filter type should be Required.
10. Error Message : Value does not match the criteria.
11. Enable the filter by click on Active.
12. Next >> Next >> Save.

Creation of Lookup Field on Billing details and feedback Object :

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

Creation of Checkbox Fields

Creation of Checkbox Field on Appointment Object :

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

Creation of Another Checkbox Field on Appointment Object :

1. Repeat the steps form 1 to 3.
2. Give the Field Label : Repairs
3. Field Name : is auto populated

4. Default value : unchecked
5. Click on next >> next >> save.
6. Follow the same and create another checkbox with given names
7. Give the Field Label : Replacement Parts
8. Field Name : is auto populated
9. Default value : unchecked
10. Click on next >> next >> save.

The screenshot shows the Salesforce setup interface. The top navigation bar includes links for Home, Object Manager, and a search bar labeled "Search Setup". Below this is a breadcrumb trail: SETUP > OBJECT MANAGER > Appointment. On the left, a sidebar lists various configuration options under "Fields & Relationships". The main content area displays a table titled "Fields & Relationships" with 12 items. The columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table data is as follows:

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|---------------------|-----------------------|--------------------------|-------------------|---------|
| Appointment | Appointment_c | Lookup(Appointment) | | ✓ |
| Appointment Date | Appointment_Date_c | Date | | |
| Appointment Name | Name | Auto Number | | ✓ |
| Created By | CreatedBy | Lookup(User) | | |
| Customer Details | Customer_Details_c | Lookup(Customer Details) | | ✓ |
| Last Modified By | LastModifiedBy | Lookup(User) | | |
| Maintenance service | Maintenance_service_c | Checkbox | | |
| Owner | OwnerId | Lookup(User,Group) | | ✓ |
| 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) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select “Check box” as data type and click Next.
4. Give the Field Label : Quality Check Status
5. Field Name : is auto populated
6. Default value : unchecked
7. Click on next >> next >> save

Service records

Fields & Relationships
8 Items, Sorted by Field Label

| FIELD LABEL | FIELD NAME | DATA TYPE | CONTROLLING FIELD | INDEXED |
|----------------------|-------------------------|---------------------|-------------------|-------------------------------------|
| Appointment | Appointment__c | Lookup(Appointment) | | <input checked="" type="checkbox"/> |
| Created By | CreatedById | Lookup(User) | | <input type="checkbox"/> |
| Last Modified By | LastModifiedById | Lookup(User) | | <input type="checkbox"/> |
| Owner | OwnerId | Lookup(User,Group) | | <input checked="" type="checkbox"/> |
| Quality Check Status | Quality_Check_Status__c | Checkbox | | <input type="checkbox"/> |
| service date | service_date__c | Formula (Date) | | <input type="checkbox"/> |
| Service records Name | Name | Auto Number | | <input checked="" type="checkbox"/> |
| Service Status | Service_Status__c | Picklist | | <input type="checkbox"/> |

Creation of date Fields

Creation of Date Field on Appointment Object :

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

The screenshot shows the Salesforce setup interface for the 'Appointment' object. On the left, a sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Fields & Relationships' and displays a table of 12 items. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data includes fields such as Appointment, Appointment Date, Appointment Name, Created By, Customer Details, Last Modified By, Maintenance service, Owner, Repairs, and Replacement Parts.

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

Creation of Currency Fields

Creation of Currency Field on Appointment Object :

1. Go to setup >> click on Object Manager >> type object name(Appointment) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select “Currency” as data type and click Next.
4. Give the Field Label : Service Amount
5. Field Name : is auto populated
6. Click on next
7. Give read only for all the profiles in field level security for profile.
8. Click on next >> save.

The screenshot shows the Salesforce Object Manager interface. The left sidebar has 'Fields & Relationships' selected. The main area displays a table titled 'Fields & Relationships' with 8 items. The columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data is as follows:

| 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 records | Service_records__c | Lookup(Service records) | | ✓ |

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 populated

The screenshot shows the Salesforce Object Manager interface. The left sidebar has a 'Fields & Relationships' section with various options like Page Layouts, Lightning Record Pages, Buttons, etc. The main content area is titled 'Fields & Relationships' and lists 8 items. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The listed fields are:

| 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 records | Service_records__c | Lookup(Service records) | | ✓ |

Creation of Text Fields

1. Go to setup >> click on Object Manager >> type object name(Appointment) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select “Text” as data type and click Next.
4. Give the Field Label : Vehicle number plate
5. Field Name : is auto populated
6. Length : 10
7. Make field as Required and Unique.
8. Click on next >> next >> save.

Creation of Text Fields in Billing details and feedback object :

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

5. Field Name : is auto populated
6. Length : 1
7. Make field as Required and Unique.
8. Click on next >> next >> save

The screenshot shows the Salesforce Object Manager Fields & Relationships page. The URL in the browser is <https://pvpnit195-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01INS000001b8m1/FieldsAndRelationships/view>. The page title is "Billing details and feedback". The left sidebar shows various setup categories like Page Layouts, Lightning Record Pages, etc. The main content area displays a table of fields:

| 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 records | Service_records__c | Lookup(Service records) | | ✓ |

Creation of Picklist Fields

Creation of Picklist Fields in Service records object :

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

Creation of Picklist Fields in Billing details and feedback object :

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

The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** Billing details and feedback | S | +
- URL:** https://pvpst195-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01INS000001b8m1/FieldsAndRelationships/view
- Toolbar:** Apps, CMS - PVPST, GMAIL, GDB online Debugg..., english to telugu tra..., W3Schools Online..., Java Online Course..., InterviewBit, Verify it's you, All Bookmarks.
- Setup Navigation:** Cloud icon, Search Setup, Home, Object Manager.
- Section:** SETUP > OBJECT MANAGER
- Object:** Billing details and feedback
- Table:** Fields & Relationships (8 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 records | Service_records__c | Lookup(Service records) | | ✓ |

Creating Formula Field in Service records Object

1. Go to setup >> click on Object Manager >> type object name(Service records) in search bar >> click on the object.
2. Click on fields & relationship >> click on New.
3. Select Data type as “Formula” and click Next.
4. Give Field Label and Field Name as “service date” and select formula return type as “Date” and click next.
5. Insert field formula should be : CreatedDate

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

The screenshot shows the Salesforce setup interface for the 'Service records' object. On the left, a sidebar lists various configuration options under 'Fields & Relationships'. The main area displays a table titled 'Fields & Relationships' with 8 items, sorted by Field Label. The columns in the table are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table rows are as follows:

| 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 date | service_date_c | Formula (Date) | | |
| Service records Name | Name | Auto Number | | ✓ |
| Service Status | Service_Status_c | Picklist | | |

Validation rule

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

To create a validation rule to an Appointment Object

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

The screenshot shows the Salesforce setup interface for managing objects. The top navigation bar includes links for CMS - PVPSIT, GMAIL, GDB online Debug..., English to telugu tra..., W3Schools Online..., Java Online Course..., InterviewBit, and All Bookmarks. The main page title is 'Appointment | Salesforce'. The left sidebar under 'SETUP > OBJECT MANAGER' lists various configuration options: 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, and Scoping Rules. The main content area is titled 'Appointment' and shows the 'Details' tab. It displays the API Name as 'Appointment__c', which is custom and singularly labeled 'Appointment' and plurally labeled 'Appointments'. On the right side, there are buttons for 'Edit' and 'Delete'. Below the main content, there are sections for 'Enable Reports', 'Track Activities', 'Track Field History', 'Deployment Status' (set to 'Deployed'), and 'Help Settings'.

To create a validation rule to an Service records Object

1. Go to the setup page >> click on object manager >> From drop down click edit for Service records object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as “service_status_note”.
4. Insert the Error Condition Formula as :-
 1. NOT(ISPICKVAL(Service_Status__c , "Completed"))
6. 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 Setup interface. The URL is pvpst195-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01INS000001b8Sf/Details/view. The page title is "Service records | Salesforce". The left sidebar under "SETUP > OBJECT MANAGER" lists various object settings like Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The main content area shows the "Service records" object details. The "Details" tab is selected. The API Name is set to "Service_records_c". Other settings include "Custom" (checked), "Singular Label" (Service records), and "Plural Label" (Service records). On the right, there are checkboxes for "Enable Reports" (checked), "Track Activities" (checked), "Track Field History" (checked), and "Deployment Status" (Deployed). Buttons for "Edit" and "Delete" are at the top right.

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

1. Go to the setup page >> click on object manager >> From drop down click edit for Billing details and feedback object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as “ rating_should_be_less_than_5”.
4. Insert the Error Condition Formula as :-

```
NOT( REGEX( Rating_for_service__c , "[1-5]{1}" ))
```

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

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various setup categories like Fields & Relationships, Page Layouts, and Lightning Record Pages. The main content area displays the 'Billing details and feedback' object's details. The API Name is set to 'Billing_details_and_feedback_c'. The object is marked as 'Custom' and has a singular label 'Billing details and feedback'. The plural label is also 'Billing details and feedback'. On the right, there are sections for enabling reports, tracking activities, and field history, along with deployment status and help settings. Buttons for 'Edit' and 'Delete' are at the top right.

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 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 populated
6. Define the matching criteria as
7.

| Field | Matching Method |
|-----------------|-----------------|
| 1. Gmail | Exact |
| 2. Phone Number | Exact |
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 Matching rule section
5. Select the matching rule : Matching customer details
6. And Click on save.
7. After saving the Duplicate Rule, Click on Activate.

The screenshot shows the Salesforce Duplicate Rules page. The URL is https://pvpssit195-dev-ed.lightning.force.com/lightning/setup/DuplicateRules/home. The page title is "Duplicate Rules". The left sidebar shows "Data" and "Duplicate Management" sections, with "Duplicate Rules" selected. The main content area displays a table titled "All Duplicate Rules" with the following data:

| Rule Name | Description | Object | Matching Rule | Active | Last Modified By | Last Modified Date |
|---|--|------------------|---|--------|------------------|--------------------|
| Customer Detail duplicate | | Customer Details | Matching customer details | ✓ | Pkari | 18/11/2024 |
| Standard Account Duplicate Rule | Identify accounts that duplicate other accounts. | Account | Standard Account Matching Rule | ✓ | Pkari | 18/11/2024 |
| Standard Contact Duplicate Rule | Identify contacts that duplicate other contacts and leads. | Contact | Standard Contact Matching Rule Standard Lead Matching Rule | ✓ | Pkari | 18/11/2024 |
| Standard Lead Duplicate Rule | Identify leads that duplicate other leads and contacts. | Lead | Standard Lead Matching Rule Standard Contact Matching Rule | ✓ | Pkari | 18/11/2024 |

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, Tab settings, App settings, Apex class access, Visual-force page access, Page layouts, Record Types, Login hours & Login IP ranges. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

Manager Profile

To create a new profile:

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (Manager) >> Save.
2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the Garage management.
4. Scroll down to Custom Object Permissions and Give access permissions for Appointments, Billing details and feedback , service records and customer details objects as mentioned in the below diagram.
5. Changing the session times out after should be “ 8 hours of inactivity” .
6. Change the password policies as mentioned :
7. User passwords expire in should be “ never expires ”.
8. Minimum password length should be “ 8 ”, and click save.

The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** Student - Skill Wallet, SI-7740-1732263218, Profiles | Salesforce, Welcome to Salesforce: Verify.
- Left Navigation:** Home, Object Manager, profiles, Users, Profiles.
- Current Page:** Profiles, Manager.
- Profile Detail:**
 - Name: Manager
 - User License: Salesforce
 - Description: (empty)
 - Created By: Bhargava Chowdary Kolla, 19/11/2024, 4:15 pm
 - Modified By: Bhargava Chowdary Kolla, 19/11/2024, 5:27 pm
- Page Layouts:**

| Standard Object Layouts | Global | Invoice |
|----------------------------|-----------------------------------|----------------------------------|
| Email Application | Not Assigned | Invoice Line Layout |
| Home Page Layout | DE Default | Lead Layout |
| Account | Account Layout | Legal Entity Layout |
| Alternative Payment Method | Alternative Payment Method Layout | Location Layout |
| Appointment Invitation | Appointment Invitation Layout | Location Group Layout |
| Asset | Asset Layout | Location Group Assignment Layout |

Sales person Profile

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

Appointments,Billing details and feedback , service records and customer details objects as mentioned in the below diagram.

5. And click save.

| Action | Profile Name | User License | Custom |
|--|-------------------------------------|----------------------------------|-------------------------------------|
| <input type="checkbox"/> Edit Clone | Analytics Cloud Integration User | Analytics Cloud Integration User | <input type="checkbox"/> |
| <input type="checkbox"/> Edit Clone | Analytics Cloud Security User | Analytics Cloud Integration User | <input type="checkbox"/> |
| <input type="checkbox"/> Edit Clone | Authenticated Website | Authenticated Website | <input type="checkbox"/> |
| <input type="checkbox"/> Edit Clone | Authenticated Website | Authenticated Website | <input type="checkbox"/> |
| <input type="checkbox"/> Edit Del ... | B2B Reordering Portal Buyer Profile | External Apps Login | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> Edit Clone | Chatter External User | Chatter External | <input type="checkbox"/> |
| <input type="checkbox"/> Edit Clone | Chatter Free User | Chatter Free | <input type="checkbox"/> |
| <input type="checkbox"/> Edit Clone | Chatter Moderator User | Chatter Free | <input type="checkbox"/> |
| <input type="checkbox"/> Edit Clone | Contract Manager | Salesforce | <input type="checkbox"/> |
| <input type="checkbox"/> Edit Clone | Cross Org Data Proxy User | XOrg Proxy User | <input type="checkbox"/> |
| <input type="checkbox"/> Edit Del ... | Custom_Marketing Profile | Salesforce | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> Edit Del ... | Custom_Sales Profile | Salesforce | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> Edit Del ... | Custom_Support Profile | Salesforce | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> Edit Clone | Customer Community Login User | Customer Community Login | <input type="checkbox"/> |
| <input type="checkbox"/> Edit Clone | Customer Community Plus Login User | Customer Community Plus Login | <input type="checkbox"/> |

Role & Role Hierarchy

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

Creating Manager Role

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

The screenshot shows the Salesforce Setup Roles page. On the left, the navigation sidebar includes 'roles', 'Users', 'Roles' (which is selected), 'Feature Settings', 'Sales', 'Service', and 'Case Teams'. The main content area displays the 'Manager' role details. It shows the role's label as 'Manager', its manager as 'CEO', and its description: 'Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities'. Below this, a table lists users assigned to the Manager role, including Niklaus.Mikaelson. A note at the bottom states: 'javascript:srcUp(%27%2F00EdM000008B1Id%3Fsetupid%3Droles%26isdp%3Dp1%27);'.

Creating another roles

- Go to quick find >> Search for Roles >> click on set up roles.
- Click plus on CEO role, and click add role under manager.
- Give Label as “sales person” and Role name gets auto populated. Then click on Save.

The screenshot shows the Salesforce Setup Roles page. The left sidebar includes 'Quick Find', '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', and 'Users' (selected). The main content area is titled 'Understanding Roles' and contains a diagram of a role hierarchy. The hierarchy starts with 'Executive Staff' (CEO - President, CFO, VP, Sales) at the top, which branches down to 'Western Sales Director' (Director of W. Sales), 'Eastern Sales Director' (Director of E. Sales), and 'International Sales Director' (Director of Int'l Sales). These further branch down to 'Western Sales Rep' (CA Sales Rep, OR Sales Rep), 'Eastern Sales Rep' (NY Sales Rep, MA Sales Rep), and 'International Sales Rep' (Asian Sales Rep, European Sales Rep). Descriptions next to each role indicate their access rights. At the bottom right, there is a 'Set Up Roles' button and a checkbox for 'Don't show this page again'.

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 : Nicklaus
 - 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 license : Salesforce
 - i. Profiles : Manager
3. Save.

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. On the left, there's a sidebar with links for Permission Set Groups, Permission Sets, Profiles, Public Groups, Queues, Roles, User Management Settings, and a highlighted 'Users' link. Below that is a search bar and a 'Feature Settings' section with 'Data.com' and 'Prospector Users' options. A note says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'User Detail' for 'Niklaus Mikaelson'. It includes fields for Name, Alias, Email, Username, Nickname, Title, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Receive Approval Request Emails, Federation ID, App Registration: One-Time Password Authenticator, and App Registration: Salesforce Authenticator. To the right of these fields is a grid of checkboxes for various user roles and settings, such as Manager, Salesforce Platform User, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode (Classic Only), Debug Mode, High-Contrast Palette on Charts, Load Lightning Pages While Scrolling, and Salesforce CRM Content User. Some checkboxes are checked (e.g., Manager, Salesforce Platform User, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, Data.com User Type, Accessibility Mode (Classic Only), Debug Mode, High-Contrast Palette on Charts, Load Lightning Pages While Scrolling, and Salesforce CRM Content User), while others are unchecked.

creating another users

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

Note : create at least 3 users with these permissions.

The screenshot shows the Salesforce All Users page. On the left, there's a sidebar with links like Lightning Experience Transition Assistant, Salesforce Mobile Quick Start, Home, Administer (with Release Updates and Manage Users), and a Users section. The main content area has a banner at the top saying "It's Better in Lightning" and "Move to Lightning Experience and give your users a productivity boost." Below the banner is a table titled "All Users" with the following columns: Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users, each with a "Edit" link. The "Active" column contains checkmarks, and the "Profile" column shows various roles like Chatter Free User, System Administrator, Manager, sales person, and Analytics Cloud Security User.

| Action | Full Name | Alias | Username | Role | Active | Profile |
|----------------------|--------------------------------|---------|--|--------------|--------|----------------------------------|
| Edit | Chatter Expert | Chatter | chatty.00dns000006lx612ae.bhdpbg9fres@chatter.salesforce.com | | ✓ | Chatter Free User |
| Edit | karveda, Pandu Ranga Manikanta | Pkari | rukbha@company.com | | ✓ | System Administrator |
| Edit | Mikaelson, Niklaus | nmika | haihello2@gmail.com | Manager | ✓ | Manager |
| Edit | Mikaelson2, Niklaus | nmika2 | haihello3@gmail.com | sales person | ✓ | sales person |
| Edit | Mikaelson3, Niklaus | nmika3 | haihello4@gmail.com | sales person | ✓ | sales person |
| Edit | Mikaelson4, Niklaus | nmika4 | haihello5@pvpst.ac.in | sales person | ✓ | sales person |
| Edit | User, Integration | integ | integration@00dns000006lx612ae.com | | ✓ | Analytics Cloud Integration User |
| Edit | User, Security | sec | insightssecurity@00dns000006lx612ae.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.

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 populated.
4. Search for Roles.
5. In Available Members select Sales person and click on add it will be moved to selected member.
6. Click on save.

The screenshot shows the Salesforce Lightning Experience interface. At the top, there's a banner with the text "It's Better in Lightning" and "Move to Lightning Experience and give your users a productivity boost." Below the banner, the main content area is titled "Public Groups". A sub-banner within this area says "A public group is a set of users. It can contain individual users, other groups, the users in a particular role or territory, or the users in a role or territory plus all of the users below that role or territory in the hierarchy." Below this, there's a table listing a single public group:

| Action | Label | Group Name | Created By | Created Date |
|---|------------|------------|---------------------------------|---------------------|
| Edit Delete | sales team | sales_team | kariveda, Pandu Ranga Manikanta | 18/11/2024, 2:33 pm |

The left sidebar includes links for "Lightning Experience Transition Assistant", "Salesforce Mobile Quick Start", "Home", "Administrator" (with sub-links for Release Updates, Manage Users, Manage Apps, Manage Territories, Company Profile, and Data Classification), and a "Get Started" button.

Sharing Setting

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

Organization-Wide Default (OWD) Settings:

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

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

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

Role Hierarchy:

Salesforce uses a role hierarchy to determine record access.

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

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

Profiles and Permission Sets:

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

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

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 populated.
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.

The screenshot shows the Salesforce Sharing Settings page. At the top, there's a banner with the text "It's Better in Lightning" and "Move to Lightning Experience and give your users a productivity boost". Below the banner, the main content area has a title "Sharing Settings". A sub-header says "This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to Background Jobs to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation." There's a dropdown menu "Manage sharing settings for: All Objects". A "Default Sharing Settings" section contains a table titled "Organization-Wide Defaults". The table has columns for "Object", "Default Internal Access", "Default External Access", and "Grant Access Using Hierarchies". The data in the table is as follows:

| Object | Default Internal Access | Default External Access | Grant Access Using Hierarchies |
|----------------------|----------------------------|-------------------------|--------------------------------|
| Lead | Public Read/Write/Transfer | Private | ✓ |
| Account and Contract | Public Read/Write | Private | ✓ |
| Contact | Controlled by Parent | Controlled by Parent | ✓ |
| Order | Controlled by Parent | Controlled by Parent | ✓ |
| Asset | Controlled by Parent | Controlled by Parent | ✓ |
| Opportunity | Public Read/Write | Private | ✓ |
| Case | Public Read/Write/Transfer | Private | ✓ |
| Campaign | Public Full Access | Private | ✓ |
| Campaign Member | Controlled by Campaign | Controlled by Campaign | ✓ |

Flows

Create a Flow

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

2. Select the Record-triggered flow and Click on Create.
3. Select the Object as “Billing details and feedback” in the Drop down list.
4. Select the Trigger Flow when: “A record is Created or Updated”.
5. Select the Optimize the flow for: “Actions and Related Records” and Click on Done.
6. Under the Record-triggered Flow Click on “+” Symbol and In the Drop down List select the “Update records Element”. Give the Label Name : Amount Update
7. Api name : is auto populated
8. Set a filter condition : All Conditions are met(AND)
9. Field : Payment_Status__c
10. Operator : Equals
11. Value : Completed
12. And 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 from top left.
16. Click on the New Resource, And select Variable.
17. Select the resource type as text template.
18. Enter the API name as “ alert”.
19. Change the view as 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},

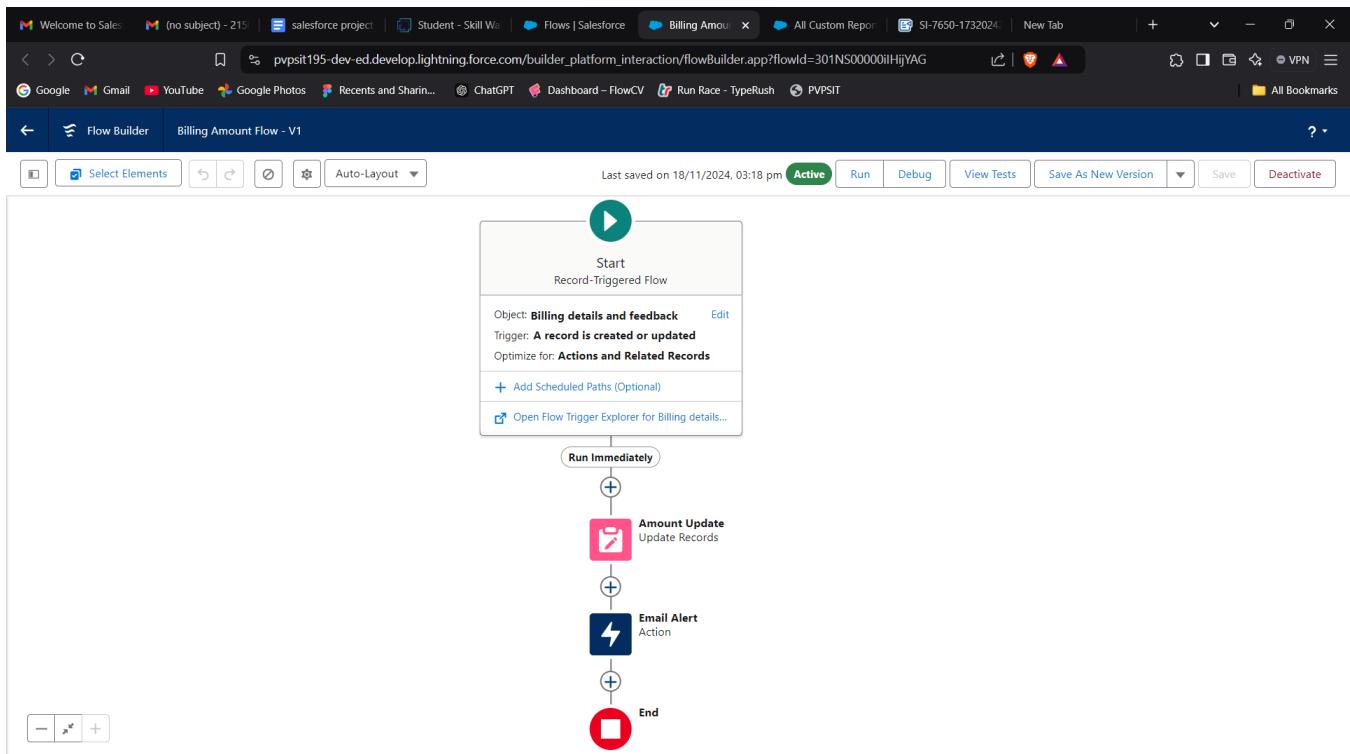
I hope this message finds you well. I wanted to take a moment to express my sincere gratitude for your recent payment for the services provided by our garage management team. Your prompt payment is greatly appreciated, and it helps us continue to provide top-notch services to you and all our valued customers.

Amount paid : {!\$Record.Payment_Paid__c}

Thank you for Coming .

23. Click done.
24. Now Click on Add Element , select Action.
25. Their action bar will be opened in that search for “ send email ” and click on it.
23. Give the label name as “ Email Alert”

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



Apex Trigger

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

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

- insert

- update
- delete
- merge
- upset
- undelete

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

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

There are primarily two types of Apex Triggers:

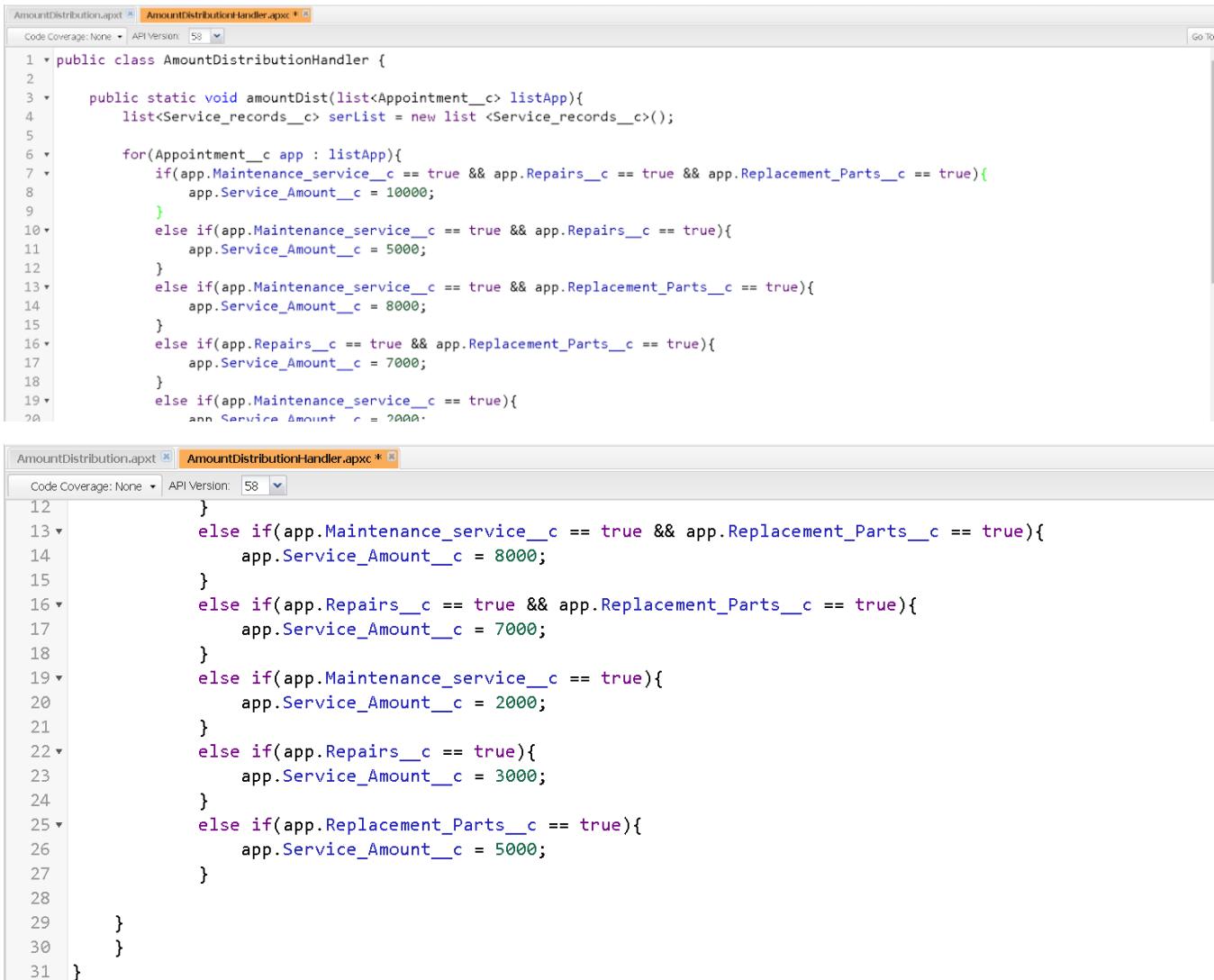
Before Trigger: This type of trigger in Salesforce is used either to update or validate the values of a record before they can be saved into the database. So, basically, the before trigger validates the record first and then saves it. Some criteria or code can be set to check data before it gets ready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

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

Apex handler

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

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



The image shows two side-by-side code editors. Both have tabs for 'AmountDistribution.apxt' and 'AmountDistributionHandler.apxc'. The top editor has lines 1 through 20 visible. The bottom editor has lines 12 through 31 visible. The code is a Java class named 'AmountDistributionHandler' with a static method 'amountDist'. The method takes a list of 'Appointment__c' objects and creates a new list of 'Service_records__c' objects. It then iterates through the input list, checking various boolean conditions (Maintenance_service__c, Repairs__c, Replacement_Parts__c) and setting the 'Service_Amount__c' field accordingly. The conditions and their corresponding service amounts are: (true, true, true) - 10000; (true, true, false) - 5000; (true, false, true) - 8000; (false, true, true) - 7000; (true, false, false) - 2000; (false, true, false) - 3000; (false, false, true) - 5000.

```
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;  
            }  
        }  
    }  
}
```

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 trail-head account, navigate to the gear icon in the top right corner.
2. Click on developer console and you will be navigated to a new console window.
3. Click on File menu in the tool bar, and click on new? Trigger.
4. Enter the trigger name and the object to be triggered.
5. Name : AmountDistribution

6. sObject : Appointment__c

Syntax For creating trigger :

The syntax for creating trigger is :

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

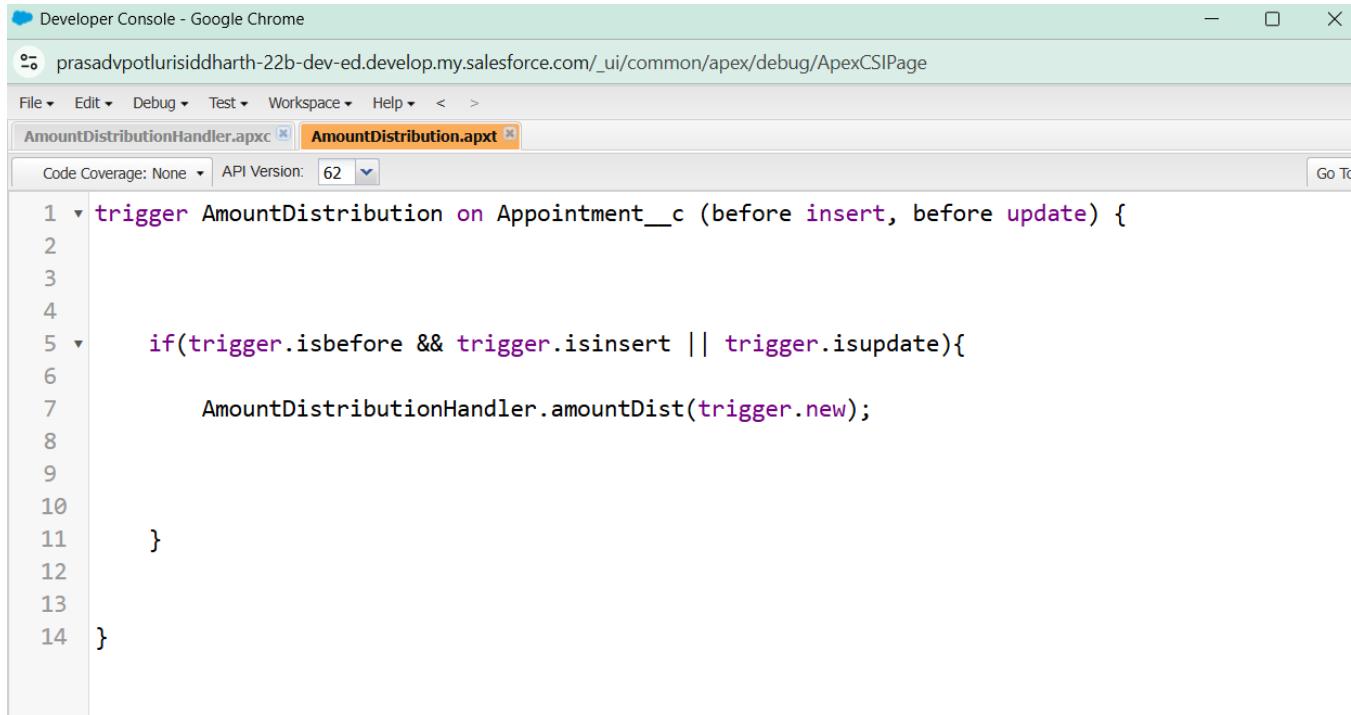
```
{  
}
```

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

Code:

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

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



The screenshot shows the Salesforce Developer Console in Google Chrome. The title bar says "Developer Console - Google Chrome". The address bar shows the URL "prasadvpotlurisiddharth-22b-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage". Below the address bar is a menu bar with "File", "Edit", "Debug", "Test", "Workspace", "Help", and navigation buttons. There are two tabs open: "AmountDistributionHandler.apxc" and "AmountDistribution.apxt". The "AmountDistribution.apxt" tab is active. The code editor displays the following Apex trigger code:

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

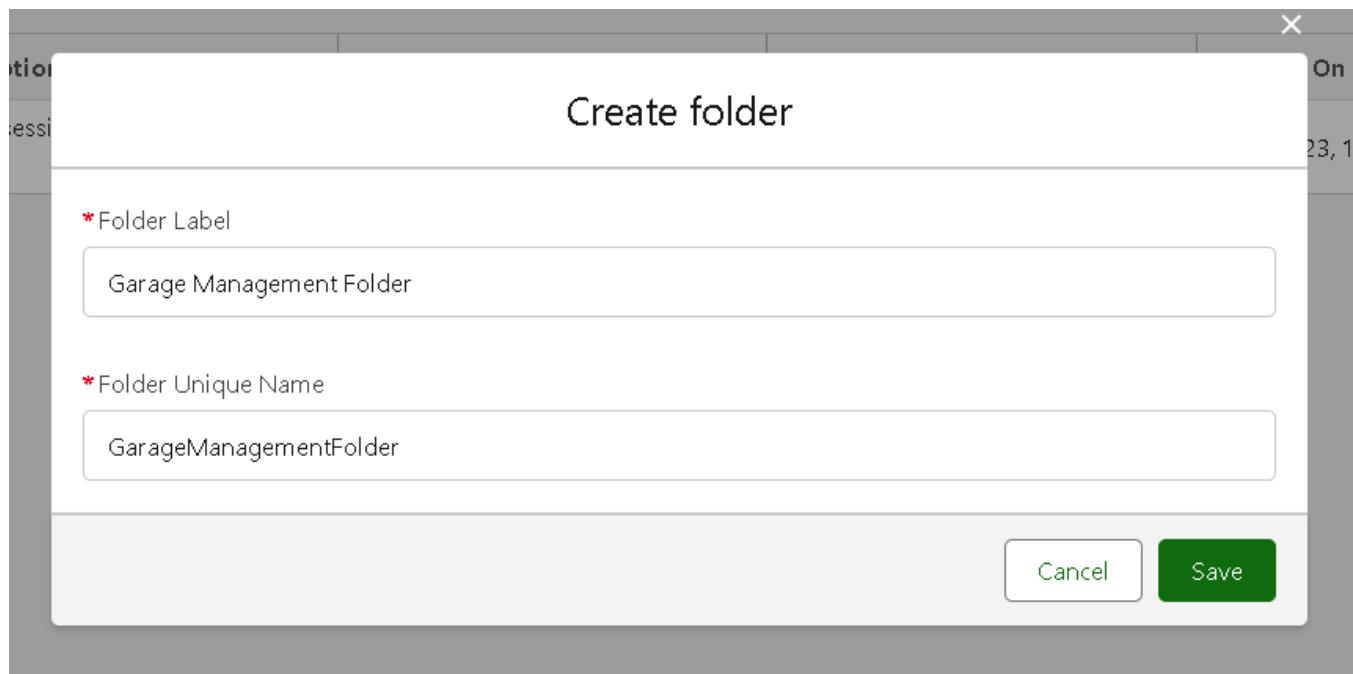
combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

Types of Reports in Salesforce

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

create a report folder

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



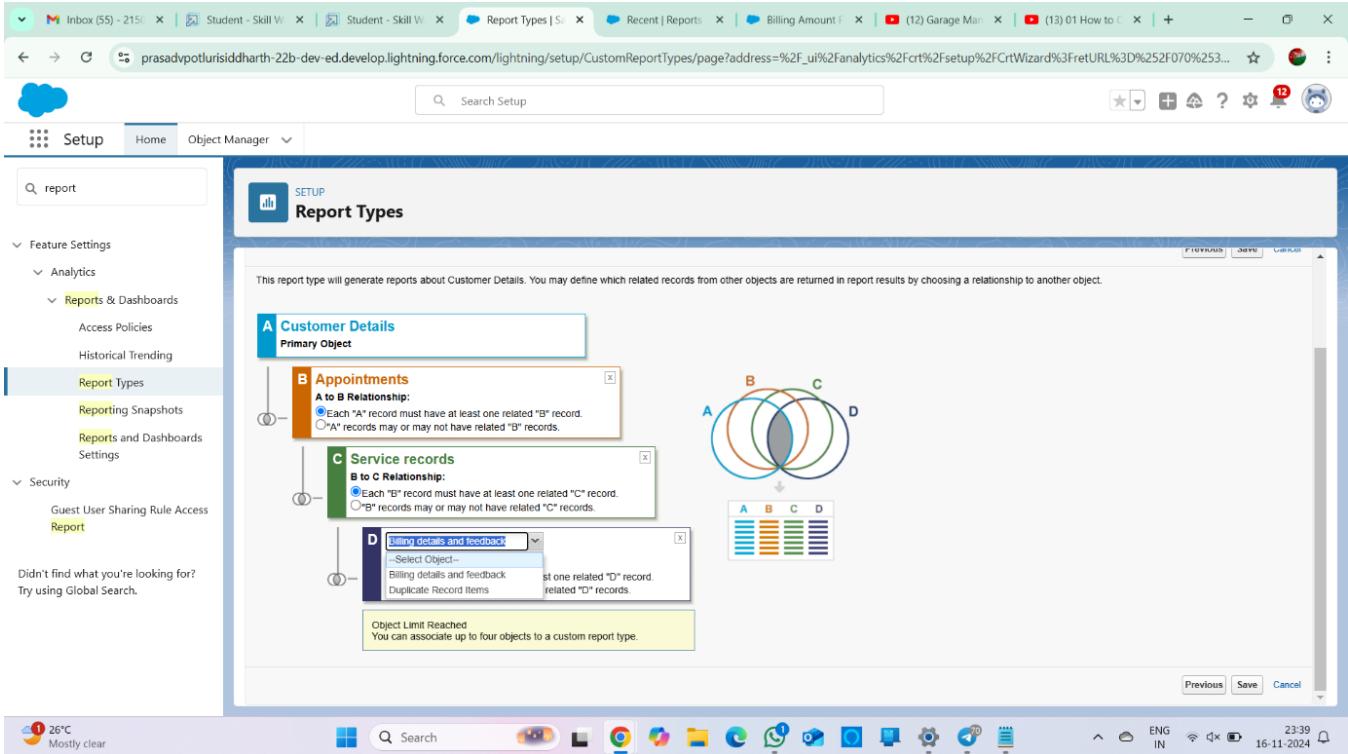
Sharing a report folder

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

4. Then click share, and click on Done.

Create Report Type

1. Go to setup >> type users in quick find box >> select Report Type >> click on Continue.
2. Click on new custom report type.
3. Select the Primary object as “ Customer details” .
4. Give the Report type Label as “ Service information ”
5. Report type Name is auto populated.
6. Keep the Description as same.
7. Select Store in Category as “ other Reports ”
8. Select the deployment status as “ Depolyed ”, 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. And select the related object as “ service records”.
13. Repeat the process and select the related object as “ Billing details and feedback”.
14. And click on save.



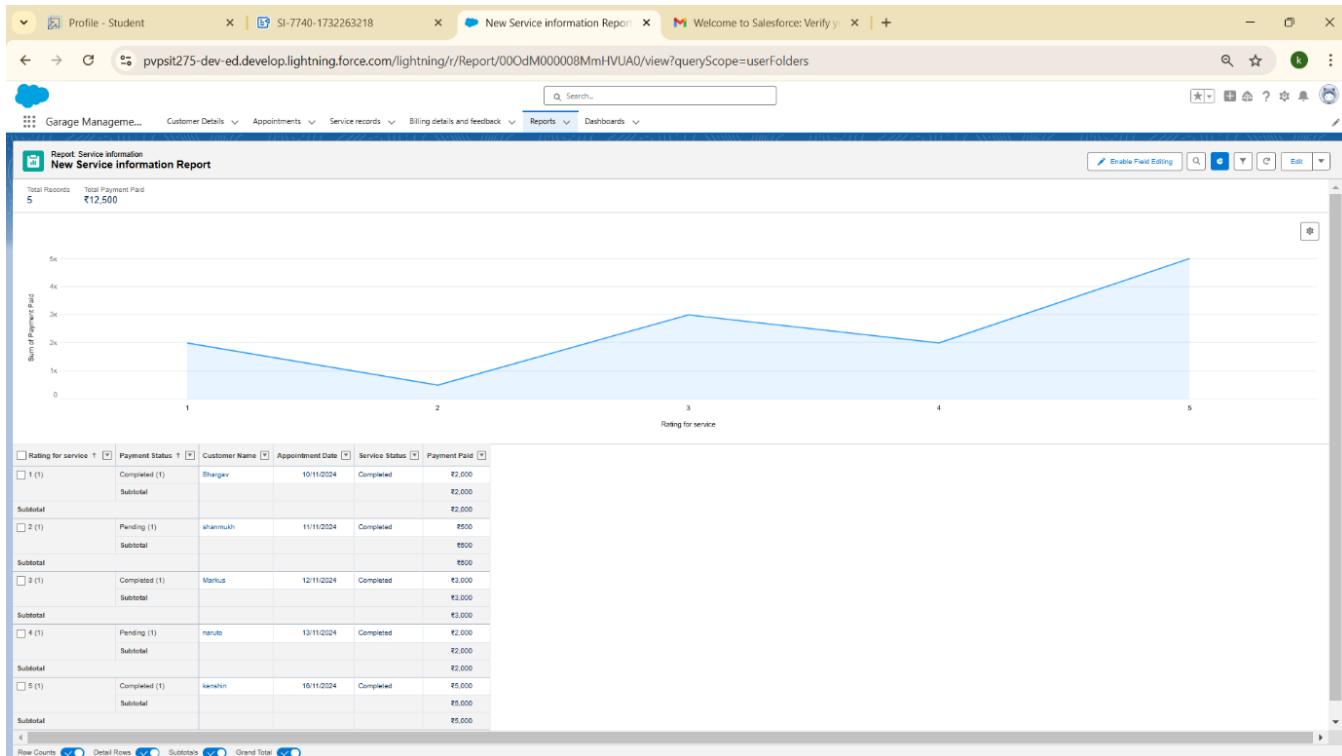
Create Report

Note : Before creating report, create latest “10” records in every object.

Try to fill every field in each record for better experience.

1. Go to the app >> click on the reports tab
2. Click New Report.
3. Select the Category as other reports, search for Service Information, select that report, click on it. And click on start report.
4. Their outline pane is opened already, select the fields that mentioned below in column section.
 1. Customer name
 2. Appointment Date
 3. Service Status
 4. Payment paid
5. Remove the unnecessary fields.
6. Select the fields that mentioned below in GROUP ROWS section.
 1. Rating for Service
7. Select the fields that mentioned below in GROUP ROWS section.

1. Payment Status
8. Click on Add Chart , Select the Line Chart.
9. Click on save, Give the report Name : New Service information Report
10. Report unique Name is auto populated.
11. Select the folder the created and Click on save.



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.

Create Dashboard Folder

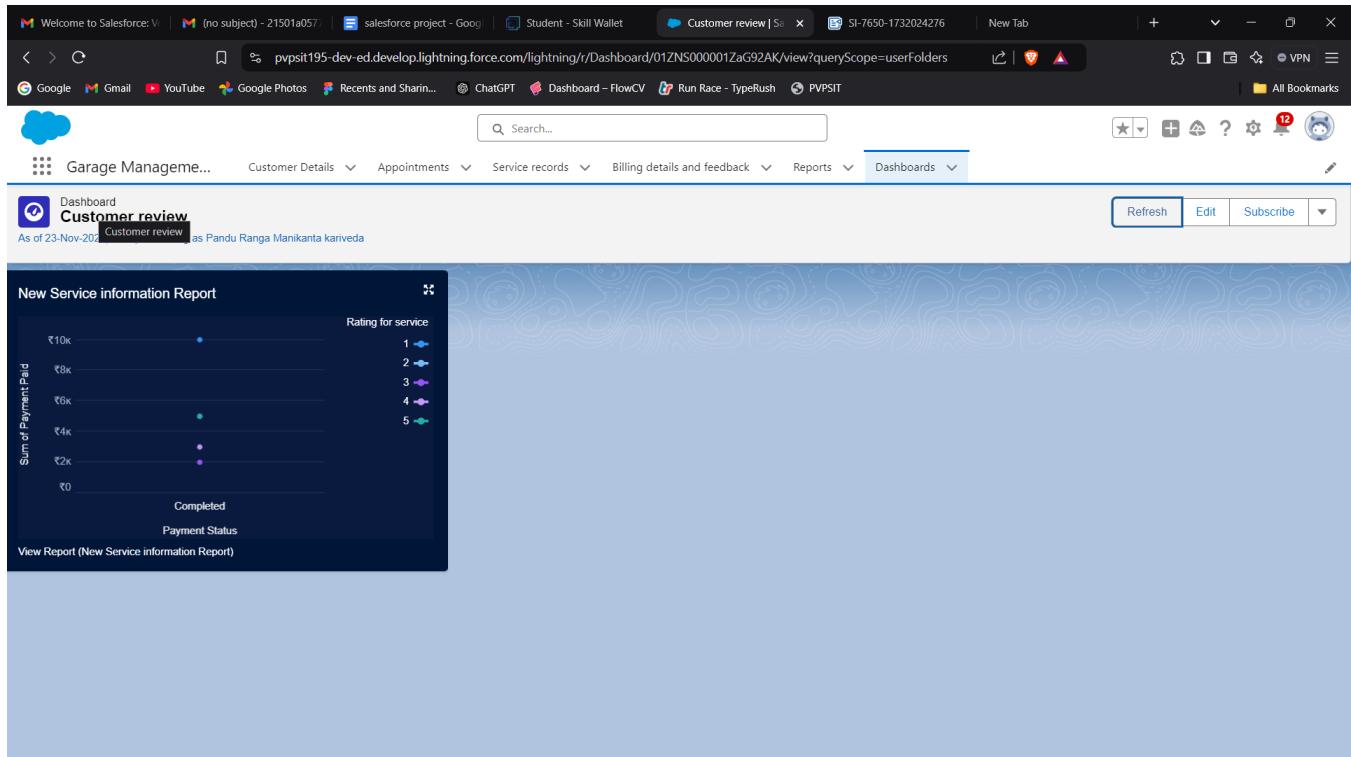
1. Click on the app launcher and search for dashboard.
2. Click on dashboard tab.
3. Click new folder, give the folder label as “ Service Rating dashboard”.
4. Folder unique name will be auto populated.
5. Click save.

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

The screenshot shows a 'Create folder' dialog box. At the top center is the title 'Create folder'. Below it is a field labeled '*Folder Label' containing the text 'Service Rating'. Underneath is another field labeled '*Folder Unique Name' containing the text 'ServiceRating'. In the bottom right corner of the dialog box are two buttons: 'Cancel' and 'Save'.

Create Dashboard

1. Go to the app >> click on the Dashboards tabs.
2. Give a Name and select the folder that created, and click on create.
3. Select add component.
4. Select a Report and click on select.
5. Select the Line Chart. Change the theme.
6. Click Add then click on Save and then click on Done.
7. Preview is shown below.



Subscription:

1. After that Click on Subscribe on top right.
2. Set the Frequency as “ weekly ”.
3. Set a day as Monday.
4. And 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

Receive new results by email when dashboard is refreshed. 

Send email to

Me

[Edit Recipients](#) 

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

New Service information Report

Rating for service



[View Report \(New Service information Report\)](#)