

GARAGE MANAGEMENT SYSTEM

Project Abstraction

The Garage Management System is a web-based tool designed to manage and track all garage operations. The system aims to provide a centralized platform for garage owners to monitor and control their business activities, including employee management, inventory tracking, and customer service.

The system is built on the Salesforce platform, which provides a robust and secure infrastructure for managing and storing data. The Salesforce platform also offers a wide range of tools and features that can be used to customize and extend the system to meet the specific needs of the garage business.

One of the key features of the Garage Management System is its employee management module. This module allows garage owners to keep track of all their employees, including their contact information, work schedules, and job assignments. The system also provides tools for managing employee performance, such as tracking attendance and evaluating performance.

The Garage Management System also includes a customer service module, which allows garage owners to keep track of all their customers and their interactions with the garage. The system provides tools for managing customer information, such as contact details and service history, as well as tools for scheduling appointments and tracking customer feedback.

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INTRODUCTION

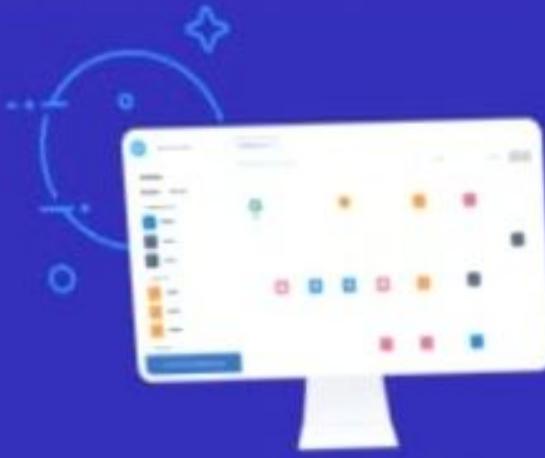
The Garage Management System is a comprehensive solution designed to optimize the usage of vehicles and trailers that carry inventories to stores. The system aims to streamline the management of vehicle records, track vehicles, and ensure efficient inventory transportation. The Garage Management System will be built on the Salesforce platform, leveraging its robust architecture and scalability. The system will consist of several components, including vehicle records, inventory management, workflow automation, and integration with other Salesforce modules. The implementation strategy will involve requirements gathering, design, development, testing, and deployment. The abstraction framework for the system will use an Integration Procedure to get input from a workflow, query the product model based on that input, and update products, attributes, and inventory levels. The Garage Management System will provide a flexible and scalable architecture for managing and optimizing inventory transportation, ensuring efficient vehicle utilization, and automating business processes.

TASK 1:

Creating Developer Account:

Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up



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

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

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.



Sign up for your Salesforce Developer Edition

A full-featured copy of the Platform, for free

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

First name*
Your first name

Last name*
Your last name

Email*
Your email address

Role*
Your job role

Company*
Company Name

Account Activation

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

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

Change Your Password

Enter a new password for lead@sb.com.

Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password

 Good

* Confirm New Password

 Match

Security Question

* In what city were you born?

* Answer

 asdfghijkl

Change Password

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



A screenshot of the Salesforce Setup Home page. The main title is "SETUP Home". Below it are three cards: "Get Started with Einstein Bots" (with a white robot icon), "Mobile Publisher" (with a smartphone icon), and "Real-time Collaborative Docs" (with a red document icon). Each card has a "Get Started" button. On the left sidebar, under "Setup Home", are links for "Service Setup Assistant", "Multi-Factor Authentication Assistant", "Release Updates", "Lightning Experience Transition Assistant", "Salesforce Mobile App", and "Lightning Usage Optimizer". Under "ADMINISTRATION", there is a link for "Users".

TASK 2:

Create Customer Details Object

To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
1. Enter the label name >> Customer Details
2. Plural label name >> Customer Details
3. Enter Record Name Label and Format
 - Record Name >> Customer Name
 - Data Type >> Text
2. Click on Allow reports and Track Field History,
3. Allow search >> Save.

The screenshot shows the Salesforce Setup interface. At the top, there's a blue header bar with the URL 'gurukaraninstituteoftech156-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01Oy00001fQ52tIemail/view'. Below the header is a navigation bar with icons for Home, Object Manager, and a search bar labeled 'Search Setup'. The main content area has a title 'Customer Details' under 'SETUP > OBJECT MANAGER'. On the left, a sidebar lists various configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, and Triggers. The 'Details' tab is selected. The main panel shows the 'Customer Details' object details. It includes fields for API Name ('Customer_Details_c'), Singular Label ('Customer Details'), Plural Label ('Customer Details'), and several checkboxes for features like 'Enable Reports', 'Track Activities', 'Track Field History', 'Deployment Status' (set to 'Deployed'), and 'Help Settings'. At the bottom right are 'Edit' and 'Delete' buttons.

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.

The screenshot shows the Salesforce Object Manager setup page for the 'Appointment' object. The left sidebar lists various configuration tabs: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Revision Rules, Scoping Rules, and Triggers. The main content area is titled 'Details' and contains fields for Description, API Name (Appointment__c), Singular Label (Appointment), Plural Label (Appointments), Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status (Deployed), Help Settings, and Standard salesforce.com Help Window. At the bottom right are 'Edit' and 'Delete' buttons.

Create Service records 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 >> Service records
2. Plural label name >> Service records
3. Enter Record Name Label and Format
 - Record Name >>Service records Name
 - Data Type >> Auto Number
 - Display Format >> ser-[000]
 - Starting number >> 1
2. Click on Allow reports and Track Field History,
3. Allow search >> Save.

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.

guru納nakeinstitute@ch156-dev-ed.lightning.force.com/lightning/nature/ObjectManager/01OC000001V78IU/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER Billing details and feedback

Details

Details

Description

API Name: Billing_details_and_feedback_c
Custom: ✓
Singular Label: Billing details and feedback
Plural Label: Billing details and feedback

Enable Reports: ✓
Task Activities:
Track Field History: ✓
Deployment Status: Deployed
Help Settings: Standard salesforce.com Help Window

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
Sharing Rules
Triggers

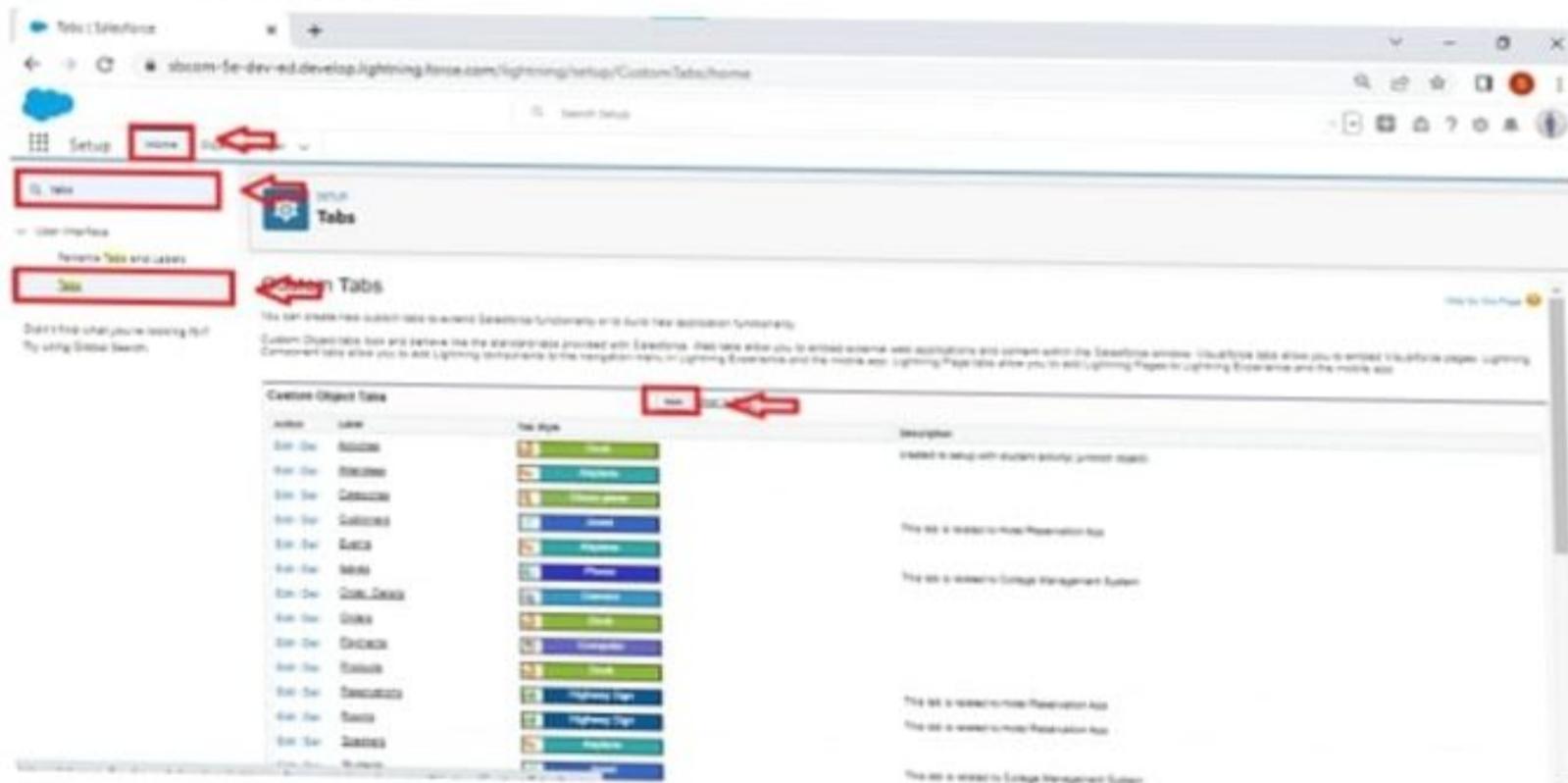
Edit Delete

TASK 3:

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 .

New Custom Object Tab

Step 1: Enter the Details

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

Select an existing custom object or create a new custom object now.

Object:

Tab Style:

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link:

Enter a short description:

Description:

Tab Style Selector

Create your own style

Hide styles which are used on other tabs

	Airplane
	Bank(1)
	Books
	Building
	Can
	Cell phone
	Circle
	CRT TV
	Dice
	Form
	Hammer
	Heart(1)
	Hot Air Balloon
	Keys

	Alarm clock
	Bell
	Bottle
	Building Block
	Car
	Chalkboard
	Compass
	Cup
	Factory
	Gears
	Hands
	Helicopter
	Insect
	Laptop

	Apple
	Big top
	Box
	Caduceus
	Castle
	Chess piece
	Computer
	Desk(1)
	Fan
	Globe
	Handsaw
	Hexagon
	IP Phone
	Leaf

	Balls
	Boat(1)
	Bridge
	Camera
	CD/DVD
	Chip
	Credit card
	Diamond
	Flag
	Guitar
	Headset
	Highway Sign
	Jewel
	Lightning

To create a Tab:(Appointment)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. Select Object(Appointment) >> 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

To create a Tab:(Service Records)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. Select Object(Service Records) >> 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

To create a Tab:(Billing details and feedback)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. Select Object(Billing details and feedback) >> 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

TASK 4:

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.

Action	Full Name *	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Garrett.Evans	GARRETT	garrett.evans@salesforce.com	SUPERVISOR	✓	Customer.Fin.User
<input type="checkbox"/>	SAUL.JORDAN	JORDAN	saul.jordan@salesforce.com	MANAGER	✓	Standard.Patron.User
<input type="checkbox"/>	SHAWN.MURRAY	SHAWN	shawn.murray@salesforce.com	MANAGER	✓	Master
<input type="checkbox"/>	EJI.RAJESWAR	EJI	eji.rajeswar@salesforce.com	ANALYST	✓	System Administrator
<input type="checkbox"/>	LEAH.CONRAD	LEAH	leah.conrad@salesforce.com	ANALYST	✓	ANALYST.Quote.Founder.US
<input type="checkbox"/>	USER_SECURITY	SECURITY	user.security@salesforce.com	SELLER	✓	America.Cloud.SecUser
<input type="checkbox"/>	KAREN.BERKLEY	KAREN	karen.berkley@salesforce.com	SELLER	✓	Standard.Patron.User
<input type="checkbox"/>	SEAN.KUREN	SEAN	sean.kuren@salesforce.com	SELLER	✓	Standard.Patron.User

TASK 5:

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

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.

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 Nme : 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 Nme : is auto populated
9. Default value : unchecked
10. Click on next >> next >> save.

Creation of Checkbox Field on Service records Object :

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

Creation of date Fields

Creation of Date Field on Appointment Object :

1. Go to setup >> click on Object Manager >> type object name(Appointment) in the search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select "Date" as data type and click Next.
4. Give the Field Label : Appointment Date
5. Field Nme : is auto populated
6. Make it as a Required field by 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 & Relationships" >> New.
3. Select "Currency" as data type and click Next.
4. Give the Field Label : Service Amount
5. Field Nme : 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.

Creation of Currency Field on Billing details and feedback Object :

1. Follow the same steps as mentioned above in Billing details and feedback Object.
2. Change the label name as mentioned.
3. Give the Field Label : Payment Paid
4. Field Nme : is auto populated

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

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.

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 under the Object Manager tab. On the left, there's a sidebar with various options like Details, Fields & Relationships (which is currently 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, and Triggers. The main content area is titled 'Customer Details' and shows the 'Fields & Relationships' section. It lists several fields: Created By (CreatedById, Lookup(Users)), Customer Details Name (Name, Text(80)), Gmail (Gmail__c, Email), Last Modified By (LastModifiedById, Lookup(Users)), Owner (Owner, Lookup(Users,Groups)), and Phone number (Phone_number__c, Phone). There are buttons for Quick Find, New, Deleted Fields, Field Dependencies, and Set History Tracking at the top right of the table. The 'INDEXED' column has checkboxes for some fields, and small dropdown arrows are visible on the right side of the table.

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER Appointment

Details

Fields & Relationships

11 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment Date	Appointment_Date__c	Date		
Appointment Name	Name	Auto Number		
Created By	CreatedById	Lookup(User)		
Customer Details	Customer_Details__c	Lookup(Customer Details)		
Last Modified By	LastModifiedById	Lookup(User)		
Maintenance service	Maintenance_Service__c	Checkbox		
Owner	OwnerId	Lookup(User Group)		
Repair	Repair__c	Checkbox		
Replacement Parts	Replacement_Parts__c	Checkbox		
Service Amount	Service_Amount__c	Currency(18, 0)		
Trigger				

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER Service records

Details

Fields & Relationships

8 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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		

The screenshot shows the Salesforce Object Manager Fields & Relationships page. The object selected is 'Billing details and feedback'. The table lists 10 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(Owner)		✓
Payment Field	Payment_Paid__c	Currency(18, 2)		
Payment Status	Payment_Status__c	Picklist		
Rating for service	Rating_for_service__c	Text(1) (Unique Case Insensitive)		✓
service date	service_date__c	Formula(Date)		
Service records	Service_records__c	Lookup(Service record)		✓
Service Status	Service_Status__c	Picklist		

TASK 6:

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 :-
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 as Field and select the field as "Vehicle number plate", and click Save.

Appointment Validation Rule

Validation Rule Detail

Field Name	Value
Error Condition Formula	NOT(ISPICKVAL(Vehicle_number_plate__c , 'PA-ZPZP-002PA-ZPZP-0047'))
Error Message	Please enter valid number
Description	
Created By	Balasubramanian 29/09/2024, 2:38 pm
Modified By	Balasubramanian 29/09/2024, 2:38 pm

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 :-
NOT(ISPICKVAL(Service_Status__c , "Completed"))
5. 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.

Service records Validation Rule

Validation Rule Detail

Rule Name	Service records Validation Rule - Salesforce - Developer Edition
Error Condition	NOT(REGEX(Rating_for_service__c , "[1-5][]"))
Error Message	rating is pending
Description	
Created By	Balaram, PB 29/06/2024, 2:41 pm
Active	<input checked="" type="checkbox"/>
Error Location	Service Details
Modified By	Balaram, PB 29/06/2024, 2:41 pm

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

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various setup options like Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The main content area displays the 'Billing details and feedback Validation Rule'. The rule has the following details:

Validation Rule Detail	
Rule Name	rating_should_be_less_than_10
Error Condition Formula	NOT(REGEX(Rating_for_service_c , '^0-9{1,2}\$'))
Error Message	rating should be from 0 to 9
Description	
Created By	Rajkumar PB (29/09/2024, 2:43 pm)
Modified By	Rajkumar PB (29/09/2024, 6:41 pm)

Buttons for Edit and Delete are located at the bottom right of the detail pane.

TASK 7:

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.

The screenshot shows the Salesforce Setup interface with the title 'Matching Rules'. The left sidebar has 'Data' selected, with 'Duplicate Management' and 'Matching Rules' under it. The main content area shows a matching rule named 'Matching customer details' for the 'Customer Details' object. The rule is active and was created by 'Salesforce Dev' on 29/09/2014 at 2:45 pm. The matching criteria is defined as 'Customer details must match MATCHScore = FALSE and (Customer details - Phone_number exact match) OR Customer details - Email_address exact match'.

create a Duplicate rule to an Customer details object

Go to quick find box in setup and search for Duplicate rules.

Click on Duplicate rule >> click on New Rule >> select customer details object.

Give the Rule name as : Customer Detail duplicate

Scroll a little in Matching rule section

Select the matching rule : Matching customer details

And Click on save.

After saving the Duplicate Rule, Click on Activate.

The screenshot shows the Salesforce Setup interface with the title 'Duplicate Rules'. The left sidebar has 'Data' selected, with 'Duplicate Rules' under it. The main content area shows a list of duplicate rules. One rule, 'Customer Detail duplicate', is highlighted with a green border. The table includes columns for Rule Name, Description, Active status, Last Modified By, and Last Modified Date. Other rules listed include 'Account Duplicate Rule', 'Contact Duplicate Rule', 'Opportunity Duplicate Rule', 'Lead Duplicate Rule', and 'Case Duplicate Rule'.

Rule Name	Description	Active	Last Modified By	Last Modified Date
Customer Detail duplicate	Identify accounts that duplicate other accounts	✓	Salesforce Dev	29/09/2014
Standard Account Duplicate Rule	Identify contacts that duplicate other contact records	✓	Salesforce Dev	24/09/2013
Standard Contact Duplicate Rule	Identify leads that duplicate other leads and contacts	✓	Salesforce Dev	24/09/2013
Standard Lead Duplicate Rule	Identify cases that duplicate other cases and contacts	✓	Salesforce Dev	24/09/2013
Customer Detail	Identify account duplicates	✓	Salesforce Dev	29/09/2014
Contact Duplicate	Identify contact duplicates	✓	Salesforce Dev	24/09/2013
Opportunity Duplicate	Identify opportunity duplicates	✓	Salesforce Dev	24/09/2013
Lead Duplicate	Identify lead duplicates	✓	Salesforce Dev	24/09/2013
Case Duplicate	Identify case duplicates	✓	Salesforce Dev	24/09/2013

Edit Duplicate Rule
Customer Detail duplicate

Help for this Page

Duplicate Rule Edit Save Save & New Cancel

Rule Details

Role Name: Customer Detail duplicate

Description:

Object: Customer Details

Record-Level Security: Enforce sharing rules Bypass sharing rules

Actions

Specify what happens when a user tries to save a duplicate record.

Action On Create: Allow Alert Report

Action On Edit: Allow Alert Report

Alert Text: Use one of these records?

Matching Rules

Define how duplicate records are identified.

Compare Customer Details With: Customer Details

Matching Rule: matching Customer details

Matching Criteria: (Customer Details: OneLineExactMatchBank = FALSE) AND (Customer Details: Phone_ReaderExactMatchBank = FALSE)

Field Mapping: Mapping Selected

Add Rule Remove Rule

Conditions

Optionally, specify the conditions a record must meet for the rule to run.

Field	Operator	Value	AND
—None—	—None—	<input type="text"/>	AND
—None—	—None—	<input type="text"/>	AND
—None—	—None—	<input type="text"/>	AND
—None—	—None—	<input type="text"/>	AND
—None—	—None—	<input type="text"/>	

Add Filter Logic...

Save Save & New Cancel

TASK 8:

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".

8. Minimum password length should be "8", and click save.

The screenshot shows the Salesforce Setup Profiles page. The URL in the browser is <https://gurumanikinstitutech156-dev-ed.lightning.force.com/lightning/setup/EnhancedProfilePage?address=1%2F00eQ000007X&ln=1>. The page title is "Profiles". The left sidebar shows "Q. prof" under "Profiles". The main content area has a heading "Profile Manager" with a sub-section "Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information". Below this, there is a list of permissions: "User Record Type": "Customer", "Custom Object Access": "View", "Custom Data Source Access": "View", "Custom Record Type Access": "View", "Custom Custom Metadata Access": "View", "Custom Custom Object Access": "View", "Custom Data Source Status Access": "View", "Custom Field Access": "View", "Custom Record Type Access": "View", "Custom Service Provider Status Access": "View", "Custom Custom Permissions": "View". There are tabs for "Profile Detail", "Page Layout", "Object Permissions", "Custom Object Permissions", and "Object API Permissions". The "Profile Detail" tab is selected, showing fields: "Name" (Salesperson), "Manager" (System Administrator), "User License" (Salesforce), "Description" (Salesperson), "Created By" (System Administrator), "Created Date" (2024-09-20T14:29:41Z), "Last Modified By" (System Administrator), "Last Modified Date" (2024-09-20T14:29:41Z), and "Status" (Active). The "Page Layout" tab shows standard object layouts for Account, Contact, Lead, Opportunity, and Case. The "Object Permissions" tab lists various objects with their assigned permissions. The "Custom Object Permissions" tab lists custom objects with their assigned permissions. The "Object API Permissions" tab lists custom objects with their assigned permissions.

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.

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

- Profile Name:** sales person
- User License:** Analytics Cloud Integration User
- Description:** Created by [User] on 29/09/2024 3:15 pm
- Created By:** [User]
- Modified By:** [User] on 29/09/2024 4:55 pm
- Custom Profile:** Checked
- Page Layouts:**

Object	Layout	Location Group Assignment
Global	Global Layout	Location Group Assignment Layout
Email Application	Not Assigned	[View Assignment]
Home Page Layout	Home Page Default	[View Assignment]
Account	Account Layout	[View Assignment]
Alternative Payment Method	Alternative Payment Method Layout	[View Assignment]
Appointment Invitation	Appointment Invitation Layout	[View Assignment]
Asset	Asset Layout	[View Assignment]
Case	Case Layout	[View Assignment]
Contract	Contract Layout	[View Assignment]
Opportunity	Opportunity Layout	[View Assignment]
Opportunity Product	Opportunity Product Layout	[View Assignment]
Order	Order Layout	[View Assignment]

TASK 9:

Creating Manager Role

Creating Manager Role:

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

Creating another roles

Creating another two roles under manager

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

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

[Collapse All](#) [Expand All](#)

⊖ **Thesmartbridge**

[Add Role](#)

CEO [Edit](#) | [Del](#) | [Assign](#)

[Add Role](#)

CFO [Edit](#) | [Del](#) | [Assign](#)

[Add Role](#)

COO [Edit](#) | [Del](#) | [Assign](#)

[Add Role](#)

Manger [Edit](#) | [Del](#) | [Assign](#)

[Add Role](#)

SVP. Customer Service & Support [Edit](#) | [Del](#) | [Assign](#)

[Add Role](#)

SVP. Human Resources [Edit](#) | [Del](#) | [Assign](#)

[Add Role](#)

SVP. Sales & Marketing [Edit](#) | [Del](#) | [Assign](#)

[Add Role](#)

TASK 10:

Create User

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

The screenshot shows the Salesforce Setup interface. The left sidebar has a 'Users' section selected under 'User Management'. The main content area is titled 'All Users' and displays a list of users with columns for Action, Full Name, Alias, Username, Role, and Profile. Buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users' are at the top of the list. A navigation bar at the bottom includes letters from A to Z and links for Home, Object Manager, and Help.

creating another users

1. Repeat the steps and create another user using

- 1. Role : sales person
 - 2. User licence : Salesforce Platform
 - 3. Profile : sales person

Note : create atleast 3 users with these permissions.

TASK 11:

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

INDEX PAGE

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INTRODUCTION

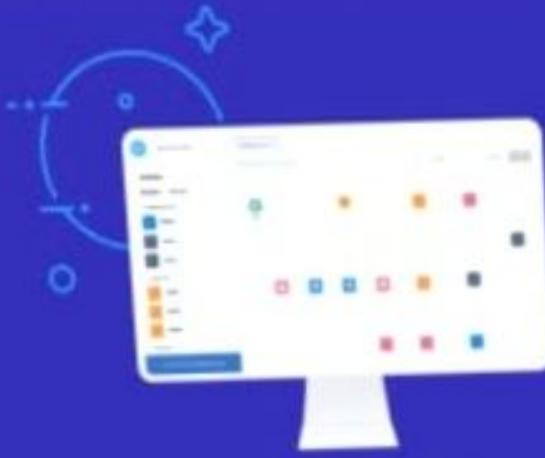
The Garage Management System is a comprehensive solution designed to optimize the usage of vehicles and trailers that carry inventories to stores. The system aims to streamline the management of vehicle records, track vehicles, and ensure efficient inventory transportation. The Garage Management System will be built on the Salesforce platform, leveraging its robust architecture and scalability. The system will consist of several components, including vehicle records, inventory management, workflow automation, and integration with other Salesforce modules. The implementation strategy will involve requirements gathering, design, development, testing, and deployment. The abstraction framework for the system will use an Integration Procedure to get input from a workflow, query the product model based on that input, and update products, attributes, and inventory levels. The Garage Management System will provide a flexible and scalable architecture for managing and optimizing inventory transportation, ensuring efficient vehicle utilization, and automating business processes.

TASK 1:

Creating Developer Account:

Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up



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

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

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.



Sign up for your Salesforce Developer Edition

A full-featured copy of the Platform, for free

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

First name*
Your first name

Last name*
Your last name

Email*
Your email address

Role*
Your job role

Company*
Company Name

Account Activation

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

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

Change Your Password

Enter a new password for lead@sb.com.

Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

* New Password

Good

* Confirm New Password

Match

Security Question

* In what city were you born?

* Answer

asdfghijkl

Change Password

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



TASK 2:

Create Customer Details Object

To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
1. Enter the label name >> Customer Details
2. Plural label name >> Customer Details
3. Enter Record Name Label and Format
 - Record Name >> Customer Name
 - Data Type >> Text
2. Click on Allow reports and Track Field History,
3. Allow search >> Save.

The screenshot shows the Salesforce setup interface for creating a new object named 'Customer Details'. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, etc. The main 'Details' tab is selected. The 'Description' field is empty. The 'API Name' is set to 'Customer_Details_c' with a note 'Custom'. Under 'Labels', 'Singular Label' is 'Customer Details' and 'Plural Label' is 'Customer Details'. On the right, checkboxes for 'Allow Reports' (checked), 'Track Activities' (unchecked), 'Track Field History' (checked), 'Deployment Status' (unchecked), 'Deployed' (unchecked), and 'Help Settings' (unchecked) are shown. A note at the bottom states 'Standard salesforce.com Help Window'. At the top right, there are 'Edit' and 'Delete' buttons.

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.

The screenshot shows the Salesforce Object Manager setup page for the 'Appointment' object. The left sidebar lists various configuration tabs: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Revision Rules, Scoping Rules, and Triggers. The main content area is titled 'Details' and contains fields for Description, API Name (Appointment__c), Singular Label (Appointment), Plural Label (Appointments), Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status (Deployed), Help Settings, and Standard salesforce.com Help Window. At the bottom right are 'Edit' and 'Delete' buttons.

Create Service records 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 >> Service records
2. Plural label name >> Service records
3. Enter Record Name Label and Format
 - Record Name >>Service records Name
 - Data Type >> Auto Number
 - Display Format >> ser-[000]
 - Starting number >> 1
2. Click on Allow reports and Track Field History,
3. Allow search >> Save.

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.

guru納nakeinstitute@ch156-dev-ed.lightning.force.com/lightning/nature/ObjectManager/01OC000001V78IU/Details/view

Setup Home Object Manager

SETUP > OBJECT MANAGER Billing details and feedback

Details

Details

Description

API Name: Billing_details_and_feedback_c
Custom: ✓
Singular Label: Billing details and feedback
Plural Label: Billing details and feedback

Enable Reports: ✓
Task Activities:
Track Field History: ✓
Deployment Status: Deployed
Help Settings: Standard salesforce.com Help Window

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
Sharing Rules
Triggers

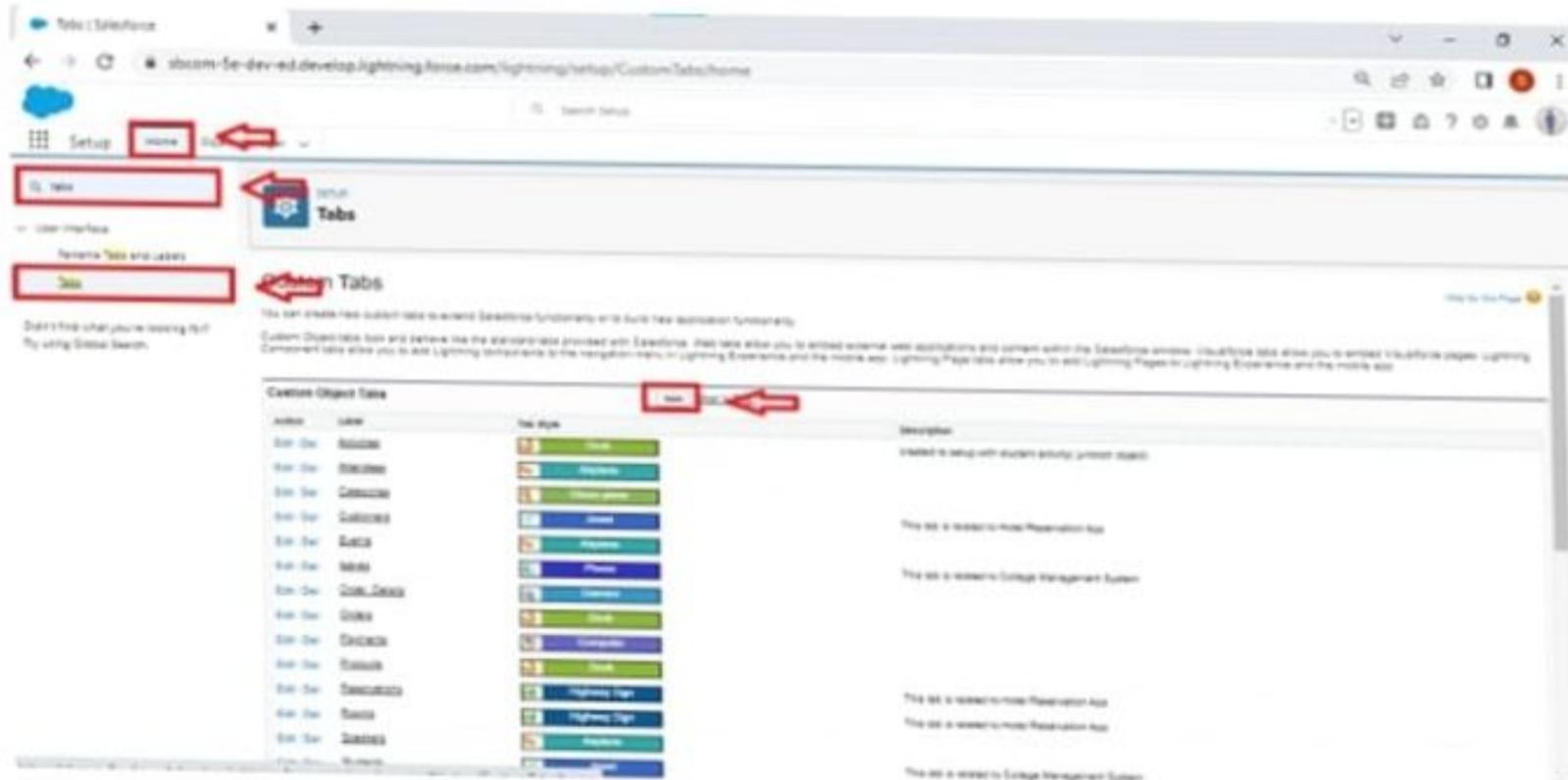
Edit Delete

TASK 3:

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 .

New Custom Object Tab

Step 1: Enter the Details

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

Select an existing custom object or create a new custom object now.

Object:

Tab Style:

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link:

Enter a short description:

Description:

Tab Style Selector

Create your own style

Hide styles which are used on other tabs

	Airplane
	Bank(1)
	Books
	Building
	Can
	Cell phone
	Circle
	CRT TV
	Dice
	Form
	Hammer
	Heart(1)
	Hot Air Balloon
	Keys

	Alarm clock
	Bell
	Bottle
	Building Block
	Car
	Chalkboard
	Compass
	Cup
	Factory
	Gears
	Hands
	Helicopter
	Insect
	Laptop

	Apple
	Big top
	Box
	Caduceus
	Castle
	Chess piece
	Computer
	Desk(1)
	Fan
	Globe
	Handsaw
	Hexagon
	IP Phone
	Leaf

	Balls
	Boat(1)
	Bridge
	Camera
	CD/DVD
	Chip
	Credit card
	Diamond
	Flag
	Guitar
	Headset
	Highway Sign
	Jewel
	Lightning

To create a Tab:(Appointment)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. Select Object(Appointment) >> 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

To create a Tab:(Service Records)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. Select Object(Service Records) >> 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

To create a Tab:(Billing details and feedback)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. Select Object(Billing details and feedback) >> 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

TASK 4:

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.

Action	Full Name *	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Garrett.Evans	GARRETT	garrett.evans@salesforce.com	SUPERVISOR	✓	Customer.Fin.User
<input type="checkbox"/>	SAUL.JORDAN	JORDAN	saul.jordan@salesforce.com	MANAGER	✓	Standard.Patron.User
<input type="checkbox"/>	SHAWN.MURRAY	SHAWN	shawn.murray@salesforce.com	MANAGER	✓	Master
<input type="checkbox"/>	EJI.RAJESWAR	EJI	eji.rajeswar@salesforce.com	ANALYST	✓	System Administrator
<input type="checkbox"/>	WILL.COHEN	WILL	will.cohen@salesforce.com	ANALYST	✓	ANALYST.Quote.Founder.US
<input type="checkbox"/>	User_Security	SEC	user.security@salesforce.com	SELLER	✓	America.Cloud.SecUser
<input type="checkbox"/>	KAREN.BERKLEY	KAREN	karen.berkley@salesforce.com	SELLER	✓	Standard.Patron.User
<input type="checkbox"/>	SEAN.KUREN	SEAN	sean.kuren@salesforce.com	SELLER	✓	Standard.Patron.User

TASK 5:

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

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.

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 Nme : 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 Nme : is auto populated
9. Default value : unchecked
10. Click on next >> next >> save.

Creation of Checkbox Field on Service records Object :

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

Creation of date Fields

Creation of Date Field on Appointment Object :

1. Go to setup >> click on Object Manager >> type object name(Appointment) in the search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select "Date" as data type and click Next.
4. Give the Field Label : Appointment Date
5. Field Nme : is auto populated
6. Make it as a Required field by 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 & Relationships" >> New.
3. Select "Currency" as data type and click Next.
4. Give the Field Label : Service Amount
5. Field Nme : 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.

Creation of Currency Field on Billing details and feedback Object :

1. Follow the same steps as mentioned above in Billing details and feedback Object.
2. Change the label name as mentioned.
3. Give the Field Label : Payment Paid
4. Field Nme : is auto populated

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

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.

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 under the Object Manager tab. On the left, there's a sidebar with various options like Details, Fields & Relationships (which is currently 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, and Triggers. The main content area is titled 'Customer Details' and shows the 'Fields & Relationships' section. It lists several fields: Created By (CreatedById, Lookup(Users)), Customer Details Name (Name, Text(80)), Gmail (Gmail__c, Email), Last Modified By (LastModifiedById, Lookup(Users)), Owner (Owner, Lookup(Users,Groups)), and Phone number (Phone_number__c, Phone). There are buttons for Quick Find, New, Deleted Fields, Field Dependencies, and Set History Tracking at the top right of the table. The 'INDEXED' column has checkboxes for some fields.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(Users)		
Customer Details Name	Name	Text(80)		<input checked="" type="checkbox"/>
Gmail	Gmail__c	Email		
Last Modified By	LastModifiedById	Lookup(Users)		
Owner	Ownerid	Lookup(Users,Groups)		<input checked="" type="checkbox"/>
Phone number	Phone_number__c	Phone		

Setup Home Object Manager

SETUP > OBJECT MANAGER Appointment

Details Fields & Relationships

11 items, Sorted by Field Label

	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
	Appointment Date	Appointment_Date__c	Date		
	Appointment Name	Name	Auto Number		
	Created By	CreatedById	Lookup(User)		
	Customer Details	Customer_Details__c	Lookup(Customer Details)		
	Last Modified By	LastModifiedById	Lookup(User)		
	Maintenance service	Maintenance_Service__c	Checkbox		
	Owner	OwnerId	Lookup(User Group)		
	Repair	Repair__c	Checkbox		
	Replacement Parts	Replacement_Parts__c	Checkbox		
	Service Amount	Service_Amount__c	Currency(18, 0)		

Setup Home Object Manager

SETUP > OBJECT MANAGER Service records

Details Fields & Relationships

8 items, Sorted by Field Label

	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		

The screenshot shows the Salesforce Object Manager Fields & Relationships page. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main area displays a table titled 'Fields & Relationships' with 10 items. The columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The table includes fields such as Name (Auto Number), CreatedBy (Lookup(User)), LastModifiedBy (Lookup(User)), Owner (Lookup(User/Group)), Payment_Paid__c (Currency(18, 0)), Payment_Status__c (Picklist), Rating_for_service__c (Text(1) (Unique Case Insensitive)), service_date__c (Formula(Date)), Service_records__c (Lookup(Service record)), and Service_Status__c (Picklist). The 'INDEXED' column contains checkboxes, most of which are checked.

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

TASK 6:

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 :-
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 as Field and select the field as "Vehicle number plate", and click Save.

Appointment Validation Rule

Validation Rule Detail

Field Name	Value
Error Condition Formula	NOT(ISPICKVAL(Vehicle_number_plate__c , 'PA-ZPZP-002PA-ZPZP-0047'))
Error Message	Please enter valid number
Description	
Created By	Balasubramanian 29/09/2024, 2:38 pm
Modified By	Balasubramanian 29/09/2024, 2:38 pm

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 :-
NOT(ISPICKVAL(Service_Status__c , "Completed"))
5. 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.

Service records Validation Rule

Validation Rule Detail

Rule Name	Service records Validation Rule - Salesforce - Developer Edition
Error Condition	NOT(REGEX(Rating_for_service__c , "[1-5][]"))
Error Message	rating is pending
Description	
Created By	Balaram, PB 29/06/2024, 2:41 pm
Active	<input checked="" type="checkbox"/>
Error Location	Service Details
Modified By	Balaram, PB 29/06/2024, 2:41 pm

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

The screenshot shows the Salesforce Object Manager interface. The left sidebar lists various setup options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, and Triggers. The main content area displays a Validation Rule Detail for the 'Billing details and feedback' object. The rule is named 'rating_should_be_less_than_10'. The validation condition formula is 'NOT(REGEX(Rating_for_service_c , '^0-9{1,2}\$'))'. The error message is 'rating should be from 0 to 9'. The rule is active and was created by 'Rajkumar' on 29/09/2014 at 2:43 pm, last modified by 'Rajkumar' on 29/09/2014 at 6:41 pm.

TASK 7:

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.

The screenshot shows the Salesforce Setup interface with the title 'Matching Rules'. The left sidebar has 'Data' selected, with 'Duplicate Management' and 'Matching Rules' under it. The main content area shows a matching rule named 'Matching customer details' for the 'Customer Details' object. The rule is active and was created by 'Salesforce Dev' on 29/09/2014 at 2:45 pm. It uses the criteria 'Customer details must match MATCHScore = FALSE and (Customer details - Phone_number exact matchScore = FALSE)'. Buttons for 'Delete', 'Close', and 'Save/Cancel' are visible.

create a Duplicate rule to an Customer details object

Go to quick find box in setup and search for Duplicate rules.

Click on Duplicate rule >> click on New Rule >> select customer details object.

Give the Rule name as : Customer Detail duplicate

Scroll a little in Matching rule section

Select the matching rule : Matching customer details

And Click on save.

After saving the Duplicate Rule, Click on Activate.

The screenshot shows the Salesforce Setup interface with the title 'Duplicate Rules'. The left sidebar has 'Data' selected, with 'Duplicate Rules' under it. The main content area shows a list of duplicate rules. One rule, 'Customer Detail duplicate', is highlighted with a green border. The table includes columns for Rule Name, Description, Active status, Last Modified By, and Last Modified Date. Other rules listed include 'Account Duplicate Rule', 'Contact Duplicate Rule', 'Opportunity Duplicate Rule', 'Lead Duplicate Rule', and 'Case Duplicate Rule'.

Rule Name	Description	Active	Last Modified By	Last Modified Date
Customer Detail duplicate	Identify accounts that duplicate other accounts	✓	Salesforce Dev	29/09/2014
Standard Account Duplicate Rule	Identify contacts that duplicate other contact records	✓	Salesforce Dev	29/09/2014
Standard Contact Duplicate Rule	Identify leads that duplicate other leads and contacts	✓	Salesforce Dev	29/09/2014
Standard Lead Duplicate Rule	Identify cases that duplicate other cases and contacts	✓	Salesforce Dev	29/09/2014
Customer Detail	Identify account duplicates	✓	Salesforce Dev	29/09/2014
Contact Duplicate	Identify contact duplicates	✓	Salesforce Dev	29/09/2014
Opportunity Duplicate	Identify opportunity duplicates	✓	Salesforce Dev	29/09/2014
Lead Duplicate	Identify lead duplicates	✓	Salesforce Dev	29/09/2014
Case Duplicate	Identify case duplicates	✓	Salesforce Dev	29/09/2014

Edit Duplicate Rule
Customer Detail duplicate

Help for this Page

Duplicate Rule Edit Save Save & New Cancel

Rule Details * Required Information

Rule Name:	Customer Detail duplicate
Description:	<input type="text"/>
Object:	Customer Details
Record-Level Security:	<input checked="" type="radio"/> Enforce sharing rules <input type="radio"/> Bypass sharing rules

Actions

Specify what happens when a user tries to save a duplicate record.

Action On Create:	Allow <input checked="" type="radio"/> <input type="radio"/> Alert <input type="checkbox"/> Report
Action On Edit:	Allow <input checked="" type="radio"/> <input type="radio"/> Alert <input type="checkbox"/> Report
Alert Text:	Use one of these records?

Matching Rules

Define how duplicate records are identified.

Compare Customer Details With:	Customer Details
Matching Rule:	matching Customer details
Matching Criteria:	(Customer Details: OneLine EXACT MATCHBank = FALSE) AND (Customer Details: Phone_Number EXACT MATCHBank = FALSE)
Field Mapping:	<input checked="" type="radio"/> Mapping Selected

Conditions

Optionally, specify the conditions a record must meet for the rule to run.

Field	Operator	Value	AND
—None—	—None—	<input type="text"/>	AND
—None—	—None—	<input type="text"/>	AND
—None—	—None—	<input type="text"/>	AND
—None—	—None—	<input type="text"/>	AND
—None—	—None—	<input type="text"/>	

Add Filter Logic...

Save Save & New Cancel

TASK 8: 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".

8. Minimum password length should be "8", and click save.

The screenshot shows the Salesforce Setup Profiles page. The URL in the browser is <https://gurumanikinstitutech156-dev-ed.lightning.force.com/lightning/setup/EnhancedProfilePage?address=1%2F00eQ000007X&ln=1>. The page title is "Profiles". The left sidebar shows "Q. prof" under "Users" and "Profiles". The main content area has a heading "Profile Manager" with a sub-section "User with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information". Below this, there is a list of permissions: "User License": "Salesforce", "Manager": "true", "Created By": "SALESFORCE", "Created Date": "2024-09-23T09:29:41Z", "Last Modified By": "SALESFORCE", "Last Modified Date": "2024-09-23T09:29:41Z", "Custom Profile": checked. Under "Page Layout", there are sections for "Standard Object Layouts" and "Location Group Assignment".

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.

guru納奈instituteoftech156-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00eQy0000070962

The screenshot shows the Salesforce Setup Profiles page. The profile 'sales person' is selected. It has the following details:

- Name:** sales person
- User License:** Analytics Cloud Integration User
- Description:** Created by: SALESFORCE 29/09/2024 3:15 pm
- Created By:** SALESFORCE 29/09/2024 3:15 pm
- Modified By:** SALESFORCE 29/09/2024 4:55 pm

Page Layouts:

Standard Object Layouts	Global	Location Group Assignment
Email Application	Global Layout [ViewAssignment]	Macro [ViewAssignment]
Home Page Layout	Not Assigned [ViewAssignment]	Object Lifetime [ViewAssignment]
Account	Home Page Default [ViewAssignment]	Operating Hours [ViewAssignment]
Alternative Payment Method	Account Layout [ViewAssignment]	Opportunity [ViewAssignment]
Appointment Invitation	Alternative Payment Method Layout [ViewAssignment]	Opportunity Product [ViewAssignment]
Asset	Appointment Invitation Layout [ViewAssignment]	Order [ViewAssignment]
	Asset Layout [ViewAssignment]	

TASK 9:

Creating Manager Role

Creating Manager Role:

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

Creating another roles

Creating another two roles under manager

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

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

[Collapse All](#) [Expand All](#)

⊖ **Thesmartbridge**

[Add Role](#)

CEO [Edit](#) | [Del](#) | [Assign](#)

[Add Role](#)

CFO [Edit](#) | [Del](#) | [Assign](#)

[Add Role](#)

COO [Edit](#) | [Del](#) | [Assign](#)

[Add Role](#)

Manager [Edit](#) | [Del](#) | [Assign](#)

[Add Role](#)

SVP. Customer Service & Support [Edit](#) | [Del](#) | [Assign](#)

[Add Role](#)

SVP. Human Resources [Edit](#) | [Del](#) | [Assign](#)

[Add Role](#)

SVP. Sales & Marketing [Edit](#) | [Del](#) | [Assign](#)

[Add Role](#)

TASK 10:

Create User

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

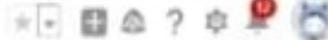


Setup

Home

Object Manager

Search Setup



Q 18

SETUP
Users

Lightning Usage

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

Users

Data

Storage Usage

Apps

Connected Apps

Connected Apps OAuth

Usage

Packaging

Package Usage

Feature Settings

All Users

Help for this Page

On this page you can create, view, and manage users.
To get more licenses, use the Your Account app. Let's Go.

View: All Users Edit | Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other

<input type="checkbox"/> Action	Full Name	Alias	Username	Role	Action	Profile
<input type="checkbox"/>	CRM Admin	CRMAdmin	CRMAdmin@00000000000000000000000000000000	System Administrator	<input checked="" type="checkbox"/>	CRM Admin (99)
<input type="checkbox"/>	Mobile User	Mobile	MobileUser@00000000000000000000000000000000	Standard Platform User	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Manager	Manager	ManagerUser@00000000000000000000000000000000	Manager	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	System Admin	SA	SA@00000000000000000000000000000000	System Administrator	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	User Interceptor	UI	UI@00000000000000000000000000000000	America Cloud Interceptor User	<input checked="" type="checkbox"/>	America Cloud Interceptor User
<input type="checkbox"/>	User Search	US	US@00000000000000000000000000000000	America Cloud Search User	<input checked="" type="checkbox"/>	America Cloud Search User
<input type="checkbox"/>	Sales Person	SP	SP@00000000000000000000000000000000	Standard Platform User	<input checked="" type="checkbox"/>	Standard Platform User
<input type="checkbox"/>	Standard User	SU	SU@00000000000000000000000000000000	Standard Platform User	<input checked="" type="checkbox"/>	Standard Platform User

New User | Reset Password(s) | Add Multiple Users

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other

creating another users

- Repeat the steps and create another user using

- Role : sales person
- User licence : Salesforce Platform
- Profile : sales person

Note : create atleast 3 users with these permissions.

TASK 11:

Creating New Public Group

- Go to setup >> type users in quick find box >> select public groups >> click New.
- Give the Label as "sales team".
- Group name is autopopulated.
- Search for Roles.
- In Available Members select Sales person and click on add it will be moved to selected member.
- Click on save.