

Salesforce Project Documentation

GARAGE MANAGEMENT



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Name

Abstract:

The Garage Management System (GMS) is a software tool designed for automotive repair facilities. It aims to enhance the operations of garages by providing features that improve service delivery, increase operational efficiency, and foster strong customer relationships. The system is user-friendly, meaning it's easy to use and navigate, and it comes with powerful features that help garages manage their day-to-day tasks effectively. By using GMS, garages can remain competitive in the market and provide a smooth and satisfying experience for both their customers and staff.

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Task 1: 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 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 with the 'Object Manager' tab selected. A new object named 'Customer Details' is being created. The 'Details' tab is active, showing fields for API Name ('Customer__c'), Singular Label ('Customer Details'), and Plural Label ('Customer Details'). On the right, checkboxes for 'Enable Reports' and 'Track Field History' are checked. The left sidebar lists various object configuration options like Fields & Relationships, Page Layouts, and Lightning Record Pages.

Create Appointment 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 interface for the 'Appointment' object. The left sidebar contains a list of configuration tabs: 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 Scrolling Rules. The main 'Details' tab is selected. On the right, there are sections for 'Description', 'API Name' (Appointment_c), 'Custom' (checked), 'Singular Label' (Appointment), 'Plural Label' (Appointments), and checkboxes for 'Enable Reports' (checked) and 'Track Activities'. Below these, 'Track Field History' is checked, and the 'Deployment Status' is set to 'Deployed'. The 'Help Settings' and 'Standard salesforce.com Help Window' are also listed.

Create Service records 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.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A new object is being created with the following details:

- API Name:** Service_records_c
- Custom:** ✓
- Singular Label:** Service records
- Plural Label:** Service records
- Enable Reports:** ✓
- Track Activities:**
- Track Field History:** ✓
- Deployment Status:** Deployed
- Help Settings:** Standard salesforce.com Help Window

Create Billing details and feedback 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

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A new object is being created with the following details:

- API Name:** Billing_details_and_feedback_c
- Custom:** ✓
- Singular Label:** Billing details and feedback
- Plural Label:** Billing details and feedback
- Enable Reports:** ✓
- Track Activities:**
- Track Field History:** ✓
- Deployment Status:** Deployed
- Help Settings:** Standard salesforce.com Help Window

Task 2: TABS

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

Creating a Custom Tabs

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. 5. Repeat the step from 1 to 4 to make other tabs also.

The screenshot shows the Salesforce Setup interface for creating custom tabs. The URL is <https://institutetechnologyandm-b-dev-ed-develop.lightning.force.com/lightning/setup/CustomTabs/home>. The left sidebar has 'User Interface' expanded, with 'Tabs' selected. The main content area is titled 'Custom Tabs' and contains three sections: 'Custom Object Tabs', 'Web Tabs', and 'Visualforce Tabs'. Under 'Custom Object Tabs', there is a table with four rows:

| Action | Label | Tab Style | Description |
|------------|------------------------------|-------------|-------------|
| Edit Del | Appointments | Apple | |
| Edit Del | Billing details and feedback | Chess piece | |
| Edit Del | Customer Details | Dice | |
| Edit Del | Service records | Globe | |

Below each section are 'New' and 'What Is This?' buttons. The bottom of the page shows the URL again: <https://institutetechnologyandm-b-dev-ed-develop.lightning.force.com/lightning/setup/CustomTabs/home>.

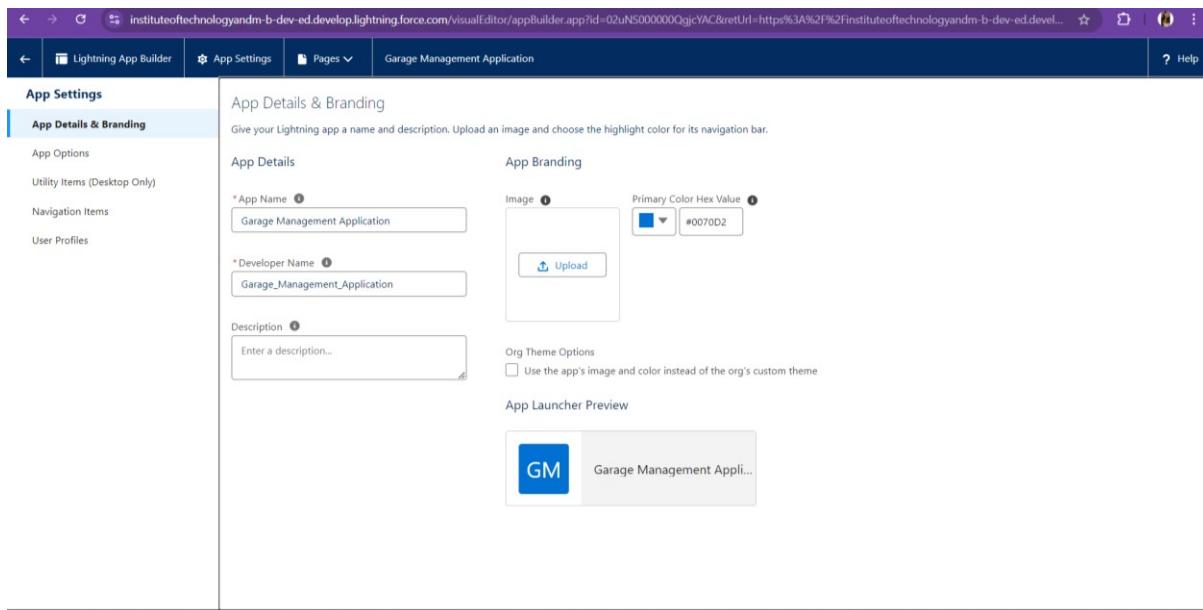
Task 3: The Lightning App

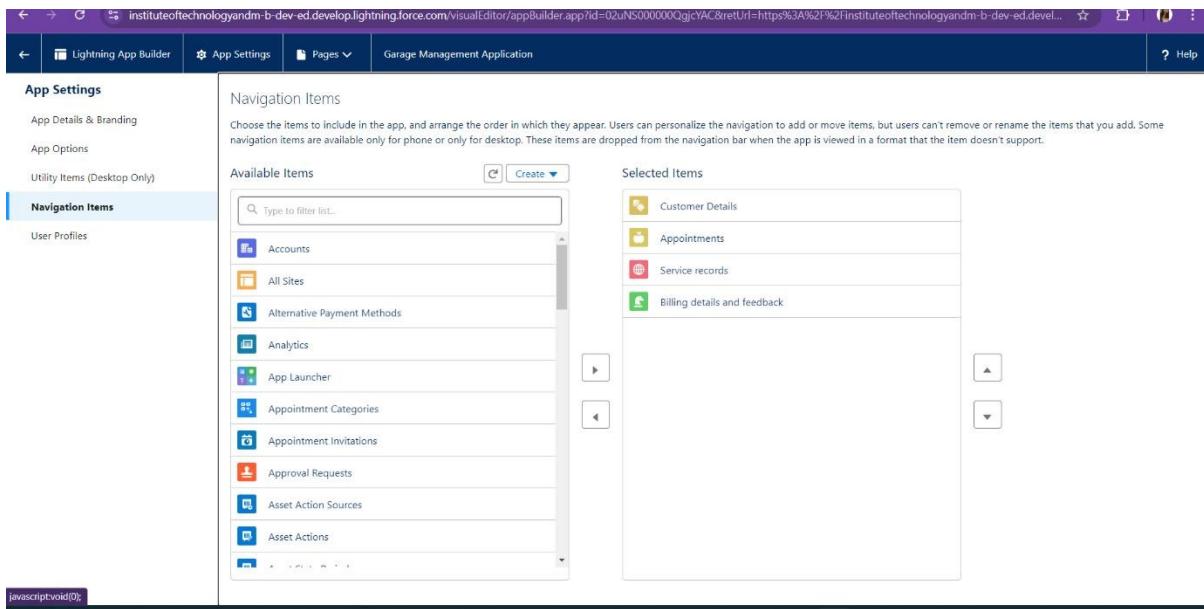
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

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.





Task 4: 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

Standard Fields

Custom Fields

[Creation of fields for the Customer Details 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

The screenshot shows the Salesforce Object Manager Fields & Relationships page for the Customer object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, etc. The main content area displays a table titled 'Fields & Relationships' with the following data:

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

Creation of Lookup Fields

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.

instituteoftechnologyandm-b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000006yrb/FieldsAndRelationships/00NN500000INXf/view

Appointment

Customer Details

Custom Field Definition Detail

| | | | |
|---------------------------|-----------------------------------|-------------|-----------------------------------|
| Field Label | Customer Details | Object Name | Appointment |
| Field Name | Customer_Details | Data Type | Lookup |
| API Name | Customer_Details_c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | Muskan Lodhi, 30/07/2024, 4:43 pm | Modified By | Muskan Lodhi, 30/07/2024, 4:43 pm |

Lookup Options

| | | | |
|---|--------------------------------|-------------------------|--------------|
| Related To | Customer_Details | Child Relationship Name | Appointments |
| Related List Label | Appointments | | |
| Required | <input type="checkbox"/> | | |
| What to do if the lookup record is deleted? | Clear the value of this field. | | |

Help for this Page

instituteoftechnologyandm-b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS00000070eP/FieldsAndRelationships/00NN500000IW35/view

Service records

Appointment

Custom Field Definition Detail

| | | | |
|---------------------------|-----------------------------------|-------------|-----------------------------------|
| Field Label | Appointment | Object Name | Service_records |
| Field Name | Appointment | Data Type | Lookup |
| API Name | Appointment_c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | Muskan Lodhi, 30/07/2024, 5:23 pm | Modified By | Muskan Lodhi, 30/07/2024, 5:23 pm |

Lookup Options

| | | | |
|---|---|-------------------------|-----------------|
| Related To | Appointment | Child Relationship Name | Service_records |
| Related List Label | Service records | | |
| Required | <input checked="" type="checkbox"/> | | |
| What to do if the lookup record is deleted? | Don't allow deletion of the lookup record that's part of a lookup relationship. | | |

Help for this Page

The screenshot shows the Salesforce Setup interface under the Object Manager. A custom field named "Service records" has been created for the "Billing details and feedback" object. The field is of type "Lookup" and points to the "Service records" object. It has a label of "Service records" and an API name of "Service_records__c". The "Data Type" is listed as "Lookup". The "Object Name" is "Billing details and feedback". The "Field Label" is "Service records". The "Field Name" is "Service_records". The "API Name" is "Service_records__c". The "Description" is empty. The "Help Text" is empty. The "Data Owner" is empty. The "Field Usage" is empty. The "Data Sensitivity Level" is empty. The "Compliance Categorization" is empty. The "Created By" is Muskan Lohi, dated 30/07/2024, 5:24 pm. The "Modified By" is Muskan Lohi, dated 30/07/2024, 5:24 pm. The "Child Relationship Name" is "Billing_details_and_feedback". The "Lookup Options" section shows "Related To" as "Service records", "Related List Label" as "Billing details and feedback", and "Required" as unchecked. The "What to do if the lookup record is deleted?" option is set to "Clear the value of this field".

Creation of Checkbox Fields

The screenshot shows the Salesforce Setup interface under the Object Manager. A custom field named "Maintenance service" has been created for the "Appointment" object. The field is of type "Checkbox" and has a label of "Maintenance service". The "Data Type" is listed as "Checkbox". The "Object Name" is "Appointment". The "Field Label" is "Maintenance service". The "Field Name" is "Maintenance_service". The "API Name" is "Maintenance_service__c". The "Description" is empty. The "Help Text" is empty. The "Data Owner" is empty. The "Field Usage" is empty. The "Data Sensitivity Level" is empty. The "Compliance Categorization" is empty. The "Created By" is Muskan Lohi, dated 30/07/2024, 5:26 pm. The "Modified By" is Muskan Lohi, dated 30/07/2024, 5:26 pm. The "Default Value" is "Unchecked". The "Field Dependencies" section shows "No dependencies defined".

The screenshot shows the Salesforce Object Manager interface. A custom field named 'Replacement Parts' has been created on the 'Appointment' object. The field is of type Checkbox and is named 'Replacement_Parts'. It was created by Muskan Lodhi on 09/08/2024 at 10:33 pm.

Custom Field Definition Detail

| Field Label | Field Name | API Name | Object Name | Data Type |
|-------------------|-------------------|---------------------|-------------|-----------|
| Replacement Parts | Replacement_Parts | Replacement_Parts_c | Appointment | Checkbox |

General Options

| Default Value | Unchecked |
|---------------|-----------|
|---------------|-----------|

Field Dependencies

| No dependencies defined. |
|--------------------------|
|--------------------------|

The screenshot shows the Salesforce Object Manager interface. A custom field named 'Quality Check Status' has been created on the 'Service records' object. The field is of type Checkbox and is named 'Quality_Check_Status'. It was created by Muskan Lodhi on 30/07/2024 at 5:27 pm.

Custom Field Definition Detail

| Field Label | Field Name | API Name | Object Name | Data Type |
|----------------------|----------------------|------------------------|-----------------|-----------|
| Quality Check Status | Quality_Check_Status | Quality_Check_Status_c | Service records | Checkbox |

General Options

| Default Value | Unchecked |
|---------------|-----------|
|---------------|-----------|

Field Dependencies

| No dependencies defined. |
|--------------------------|
|--------------------------|

Creation of date Fields

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Setup, Home, and Object Manager. A search bar labeled "Search Setup" is present. The main content area displays the "Appointment Custom Field" named "Appointment Date". The "Field Information" section shows the field label as "Appointment Date", field name as "Appointment_Date", API name as "Appointment_Date__c", and data type as "Date". The "General Options" section indicates that the field is required. The "Validation Rules" section shows a note: "No validation rules defined." The left sidebar lists various setup categories like Page Layouts, Buttons, and Record Types.

Creation of Currency Fields

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Setup, Home, and Object Manager. A search bar labeled "Search Setup" is present. The main content area displays the "Appointment Custom Field" named "Service Amount". The "Field Information" section shows the field label as "Service Amount", field name as "Service_Amount", API name as "Service_Amount__c", and data type as "Currency". The "General Options" section indicates that the field is not required. The "Currency Options" section shows settings for length (18) and decimal places (0). The left sidebar lists various setup categories like Page Layouts, Buttons, and Record Types.

Creation of Text Fields

instituteoftechnologyandm-b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS0000007g1/FieldsAndRelationships/00NNS000000ISie/view

Setup Home Object Manager

Billing details and feedback

Payment Paid

Custom Field Definition Detail

Field Information

| | | | |
|---------------------------|---------------------|-------------|------------------------------|
| Field Label | Payment Paid | Object Name | Billing_details_and_feedback |
| Field Name | Payment_Paid | Data Type | Currency |
| API Name | Payment_Paid_c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | Muskan Lodhi | Modified By | Muskan Lodhi |
| | 30/07/2024, 5:34 pm | | 30/07/2024, 5:34 pm |

General Options

| | |
|---------------|--------------------------|
| Required | <input type="checkbox"/> |
| Default Value | |

Currency Options

| | |
|----------------|----|
| Length | 18 |
| Decimal Places | 0 |

Help for this Page

Welcome to Salesforce | Report Builder | Sales | Appointment | Sales | Student - Skill Wallet | Strivers A2Z DSA Course | Search Query Auto Complete | ChatGPT

instituteoftechnologyandm-b-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01INS000006gyr/FieldsAndRelationships/00NNS000000IXS9/view

Setup Home Object Manager

Appointment

Vehicle number plate

Custom Field Definition Detail

Field Information

| | | | |
|---------------------------|------------------------|-------------|---------------------|
| Field Label | Vehicle number plate | Object Name | Appointment |
| Field Name | Vehicle_number_plate | Data Type | Text |
| API Name | Vehicle_number_plate_c | | |
| Description | | | |
| Help Text | | | |
| Data Owner | | | |
| Field Usage | | | |
| Data Sensitivity Level | | | |
| Compliance Categorization | | | |
| Created By | Muskan Lodhi | Modified By | Muskan Lodhi |
| | 30/07/2024, 5:35 pm | | 30/07/2024, 5:35 pm |

General Options

| | |
|----------------|-------------------------------------|
| Required | <input checked="" type="checkbox"/> |
| Unique | <input checked="" type="checkbox"/> |
| Case Sensitive | <input type="checkbox"/> |
| External ID | <input type="checkbox"/> |
| Default Value | |

Help for this Page

The screenshot shows the Salesforce Setup interface under the Object Manager. A custom field named "Rating for service" has been created for the object "Billing details and feedback". The field information includes:

- Field Label:** Rating for service
- Field Name:** Rating_for_service
- API Name:** Rating_for_service_c
- Description:** (empty)
- Help Text:** (empty)
- Data Owner:** (empty)
- Field Usage:** (empty)
- Data Sensitivity Level:** (empty)
- Compliance Categorization:** (empty)

General Options:

- Required:
- Unique:
- Case Sensitive:
- External ID:
- Default Value:

Custom Field Definition Detail:

- [Edit](#) | [Set Field-Level Security](#) | [View Field Accessibility](#) | [Where is this used?](#)
- Object Name: Billing_details_and_feedback
- Data Type: Text
- Created By: Muskan Lodi, 30/07/2024, 5:36 pm
- Modified By: Muskan Lodi, 31/07/2024, 5:00 pm

Creation of Picklist Fields

The screenshot shows the Salesforce Setup interface under the Object Manager. A picklist field named "Service Status" has been created for the object "Service records". The field information includes:

- Field Label:** Service Status
- Field Name:** Service_Status
- API Name:** Service_Status_c
- Description:** (empty)
- Help Text:** (empty)
- Data Owner:** (empty)
- Field Usage:** (empty)
- Data Sensitivity Level:** (empty)
- Compliance Categorization:** (empty)

General Options:

- Required:
- Default Value:

Picklist Options:

- Restrict picklist to the values defined in the value set:

Custom Field Definition Detail:

- [Edit](#) | [Set Field-Level Security](#) | [View Field Accessibility](#) | [Where is this used?](#)
- Object Name: Service_records
- Data Type: Picklist
- Created By: Muskan Lodi, 30/07/2024, 5:40 pm
- Modified By: Muskan Lodi, 30/07/2024, 5:40 pm

The screenshot shows the Salesforce Object Manager interface. The left sidebar is titled 'FIELDS & RELATIONSHIPS' under 'SETUP > OBJECT MANAGER'. The main content area is titled 'Billing details and feedback Custom Field' and 'Payment Status'. The 'Custom Field Definition Detail' section includes fields like 'Field Label' (Payment Status), 'Field Name' (Payment_Status), 'API Name' (Payment_Status__c), 'Object Name' (Billing details and feedback), and 'Data Type' (Picklist). Other sections include 'General Options' (Required checked) and 'Picklist Options' (Restrict picklist to the values defined in the value set checked). The status bar at the bottom shows system information including the date (10-08-2024).

Creating Formula Field in Service records Object

The screenshot shows the Salesforce Object Manager interface. The left sidebar is titled 'FIELDS & RELATIONSHIPS' under 'SETUP > OBJECT MANAGER'. The main content area is titled 'Service records Custom Field' and 'service date'. The 'Custom Field Definition Detail' section includes fields like 'Field Label' (service date), 'Field Name' (service_date), 'API Name' (service_date__c), 'Object Name' (Service records), and 'Data Type' (Formula). Other sections include 'Formula Options' (CreatedDate). The status bar at the bottom shows system information including the date (10-08-2024).

Task 5: 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 : - 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.

The screenshot shows the Salesforce Object Manager interface. On the left, a sidebar lists various object settings like Details, Fields & Relationships, Page Layouts, etc. The main area is titled 'Appointment Validation Rule' under the 'Appointment' object. It displays the following details:

| Validation Rule Detail | Value |
|-------------------------|---|
| Rule Name | Vehicle |
| Error Condition Formula | NOT(REGEX(Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}")) |
| Error Message | Please enter valid number |
| Description | |
| Created By | Muskan Lodhi 30/07/2024, 5:46 pm |
| Modified By | Muskan Lodhi 30/07/2024, 5:46 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_status_note | Active | ✓ |
| Error Condition Formula | NOT(ISPICKVAL(Service_Status__c, "Completed")) | Error Location | Service Status |
| Description | | Modified By | Muskan Lothi 30/07/2024, 5:47 pm |
| Created By | Muskan Lothi 30/07/2024, 5:47 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]{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.

Billing details and feedback Validation Rule

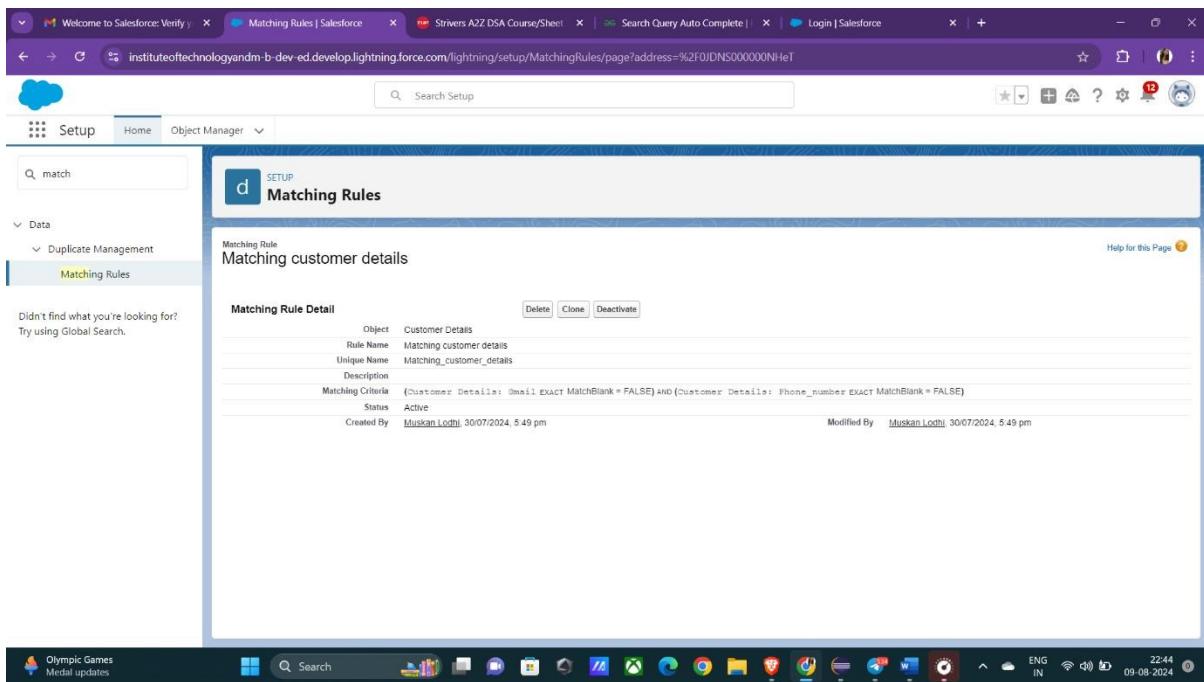
Validation Rule Detail

| | | | |
|-------------------------|---|----------------|----------------------------------|
| Rule Name | rating_should_be_less_than_5 | Active | ✓ |
| Error Condition Formula | NOT(REGEX(Rating_for_service__c , "[1-5]{1}")) | Error Location | Rating for service |
| Description | | Modified By | Muskan Lothi 30/07/2024, 5:48 pm |
| Created By | Muskan Lothi 30/07/2024, 5:48 pm | | |

Task 6: 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

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar and navigation links for Data, Duplicate Management, Duplicate Error Logs, Duplicate Rules (which is selected), and Matching Rules. A message at the bottom says "Didn't find what you're looking for? Try using Global Search." The main content area is titled "Customer Details Duplicate Rule" and "Customer Detail duplicate". It displays the "Duplicate Rule Detail" for the rule named "Customer Detail duplicate". The rule is set for the "Customer Details" object and uses "Enforce sharing rules" for Record-Level Security. Under "Action On Create", "Allow" is selected. Under "Action On Edit", "Allow" is selected, and the "Alert Text" is "Use one of these records?". The "Active" checkbox is checked. The "Matching Rule" is "Matching customer details" and is marked as "Mapped". The "Matching Criteria" is defined as "(Customer Details: Email EXACT MatchBlank = FALSE) AND (Customer Details: Phone_number EXACT MatchBlank = FALSE)". The rule was created by "Muskan Lodhi" on 30/07/2024, 5:51 pm, and modified by the same user on the same date and time. There are buttons for Edit, Delete, Close, and Deactivate.

Task 7: PROFILES

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

Manager 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 Profiles page for the Manager profile. The URL is <https://instituteoftechnologyandm-b-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00eNS000000PTCb>. The page displays the Manager profile's details, including its description, creation and modification dates, and various access permissions. It also lists the Standard Object Layouts assigned to the Manager profile, such as Global Layout, DE Default, and Account Layout, along with their respective View Assignment status.

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 under the Profiles section. A search bar at the top right contains the text "Search Setup". Below it, a navigation bar includes links for Home and Object Manager, along with a quick find bar containing "profi". The main content area is titled "Profiles" and shows the "sales person" profile. It includes sections for "Profile Detail" (Name: sales person, User License: Salesforce Platform, Description: null, Created By: Muskan Lodhi, 31/07/2024, 12:48 pm, Modified By: Muskan Lodhi, 09/08/2024, 10:50 pm), "Page Layouts" (listing Global, Lead, Location, Location Group, and Location Group Assignment layouts), and a "Custom Profile" checkbox which is checked. A note at the top states: "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. If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile." Below this are links for "Login IP Ranges", "Enabled Apex Class Access", "Enabled Visualforce Page Access", "Enabled External Data Source Access", "Enabled Named Credential Access", "Enabled External Credential Principal Access", "Enabled Custom Metadata Type Access", "Enabled Custom Setting Definitions Access", "Enabled Flow Access", "Enabled Service Presence Status Access", and "Enabled Custom Permissions".

This screenshot continues from the previous one, showing the "Salesperson" profile configuration. It highlights the "Session Settings" and "Password Policies" sections. Under Session Settings, "Session Times Out After" is set to "8 hours of inactivity" and "Session Security Level Required at Login" is set to "Service records". Under Password Policies, various settings are configured: "User passwords expire in" is set to "Never expires", "Enforce password history" is set to "3 passwords remembered", "Minimum password length" is set to "8", "Password complexity requirement" is set to "Must include alpha and numeric characters", "Password question requirement" is set to "Cannot contain password", "Maximum invalid login attempts" is set to "10", "Lockout effective period" is set to "15 minutes", "Obfuscate secret answer for password resets" is checked, "Require a minimum 1 day password lifetime" is checked, and "Don't immediately expire links in forgot password emails" is checked. Below these sections are "Login Hours" (with a note "No login hours specified") and "Login IP Ranges" (with a note "New").

Task 8: 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 And Other Roles

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.

The screenshot shows the Salesforce Setup Roles page. On the left, there's a sidebar with navigation links like 'Setup', 'Home', and 'Object Manager'. Below that, there's a search bar and a 'Your Organization's Role Hierarchy' tree view. The tree starts with 'institute of technology and management', which has several child nodes: 'CEO', 'COO', 'Manager', 'sales person', 'SVP.Customer.Service & Support', 'Customer Support_International', 'Customer Support_North America', 'Installation & Repair Services', 'SVP.Human.Resources', 'SVP.Sales & Marketing', and 'VP.International.Sales'. Each node has 'Edit | Del | Assign' buttons next to it. The 'Manager' node is expanded, showing its child 'sales person' node, which also has an 'Edit | Del | Assign' button.

Task 9: 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 Users

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

2. Fill in the fields

- First Name : Niklaus
- Last Name : Mikaelson
- Alias : Give a Alias Name
- Email id : Give your Personal Email id
- Username : Username should be in this form: text@text.text
- Nick Name : Give a Nickname
- Role : Manager

- User licence : Salesforce
- Profiles : Manager

3. Save.

| Action | Full Name | Alias | Username | Role | Active | Profile |
|--------------------------|------------------|---------|--|---------|-------------------------------------|----------------------------------|
| <input type="checkbox"/> | Chatter_Expert | Chatter | chatty@00ndy000000hz7a2aa.eib3nktairr@chatter.salesforce.com | | <input checked="" type="checkbox"/> | Chatter Free User |
| <input type="checkbox"/> | gary_nicha | gary | gdone@gmail.com | | <input checked="" type="checkbox"/> | sales person |
| <input type="checkbox"/> | green.richard | corse | mussa@gmail.com | | <input checked="" type="checkbox"/> | sales person |
| <input type="checkbox"/> | Lodi_Muskan | MLodi | mussa@commeanv.com | | <input checked="" type="checkbox"/> | System Administrator |
| <input type="checkbox"/> | Maheison_Niklaus | omika | muskanlodeh@gmail.com | Manager | <input checked="" type="checkbox"/> | Manager |
| <input type="checkbox"/> | User_Integration | integ | integration@00ndy000000hz7a2aa.com | | <input checked="" type="checkbox"/> | Analytics Cloud Integration User |
| <input type="checkbox"/> | User_Security | sec | insightsecurity@00ndy000000hz7a2aa.com | | <input checked="" type="checkbox"/> | Analytics Cloud Security User |
| <input type="checkbox"/> | wat_ami | awat | muskanlodeh@gmail.com | | <input checked="" type="checkbox"/> | sales person |

Task 10: 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 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.

The screenshot shows the Salesforce Setup interface with the 'Public Groups' page open. The left sidebar is expanded, showing categories like Users, Feature Settings, Data.com, Service, Embedded Service, and User Interface. Under 'Users', 'Public Groups' is selected. The main content area displays a group named 'sales team'. The group details include:

- Label:** sales team
- Group Name:** sales_team
- Grant Access Using Hierarchies:** ✓
- Created By:** Muskan Lohit, 31/07/2024, 12:53 pm
- Modified By:** Muskan Lohit, 31/07/2024, 12:53 pm

Below the details, there is a table titled 'View All Users' showing one member:

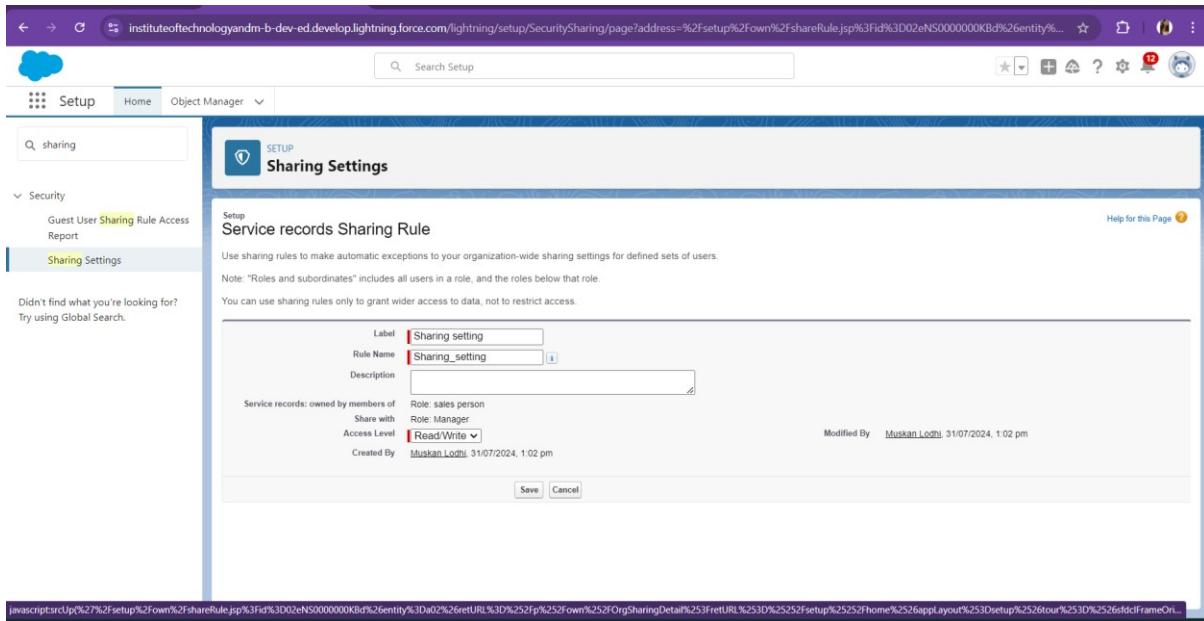
| Name | Type |
|--------------|------|
| sales_person | Role |

Task 11: 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.

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 ” In step 5 : Change the access level to “ Read / write ”.
9. Click on save



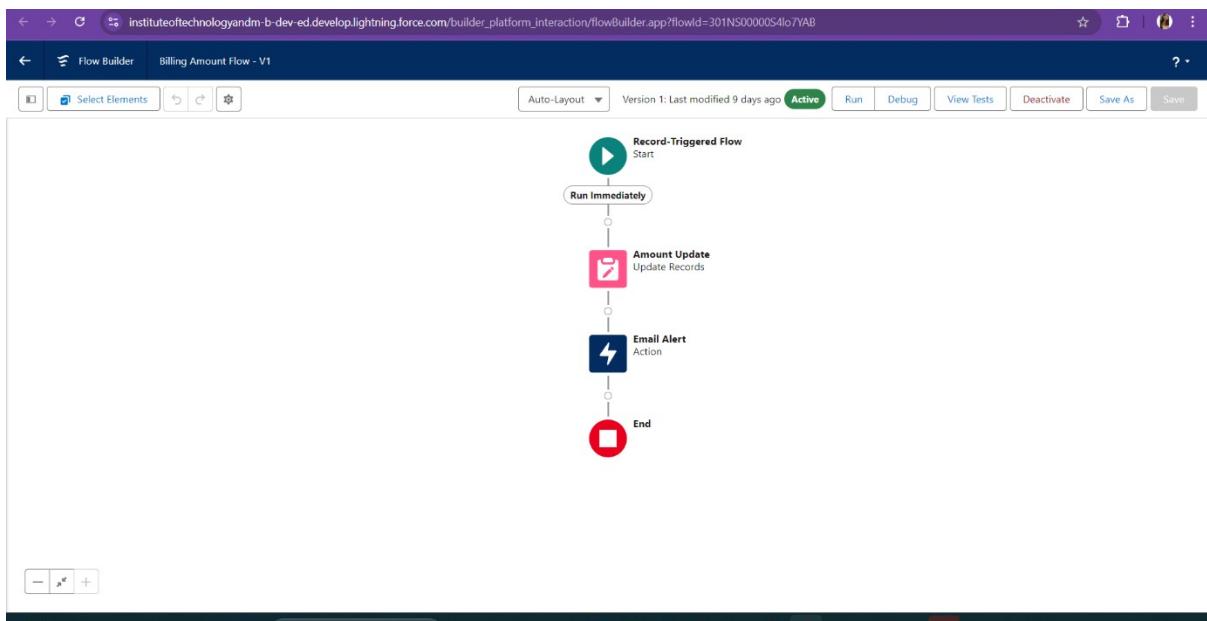
Task 12: Flows

In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

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”.
7. Give the Label Name : Amount Update
8. Api name : is auto populated
9. Set a filter condition : All Conditions are met(AND)
10. Field : Payment_Status__c
11. Operator : Equals
12. Value : Completed
13. And Set Field Values for the Billing details and feedback Record

14. Field : Payment_Paid_c
15. Value : {!\$Record.Service_records__r.Appointment__r.Service_Amount__c}
16. Click On Done.
17. Before creating another Element. Create a New Resource form Toolbox form top left.
18. Click on the New Resource, And select Variable.
19. Select the resource type as text template.
20. Enter the API name as “ alert”.
21. Change the view as Rich Text ? View to Plain Text.
22. In body field paste the syntax that given below. Dear
 {!\$Record.Service_records__r.Appointment__r.Customer_Name__r.Name},
23. 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 topnotch services to you and all our valued customers.
24. Amount paid : {!\$Record.Payment_Paid_c}
25. Thank you for Coming .
26. Click done.
27. Now Click on Add Element , select Action.
28. Their action bar will be opened in that search for “ send email ” and click on it.
29. Give the label name as “ Email Alert”
30. API name will be auto populated.
31. Enable the body in set input values for the selected action.
32. Select the text template that created , Body : {!alert}
33. Include recipient address list select the email form the record.
34. RecipientAddressList:
 {!\$Record.Service_records__r.Appointment__r.Customer_Name__r.Gmail__c} 32. Include subject as “ Thank You for Your Payment - Garage Management”.
35. Click done.
36. Click on save. Give the Flow label , Flow Api name will be autopopulated.
37. And click save, and click on activate.



Task 13: Apex Trigger

Apex can be invoked by using triggers. Apex triggers enable you to perform custom actions before or after changes to Salesforce records, such as insertions, updates, or deletions. A trigger is Apex code that executes before or after the following types of operations:

- insert
- update
- delete
- merge
- upsert
- undelete

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.

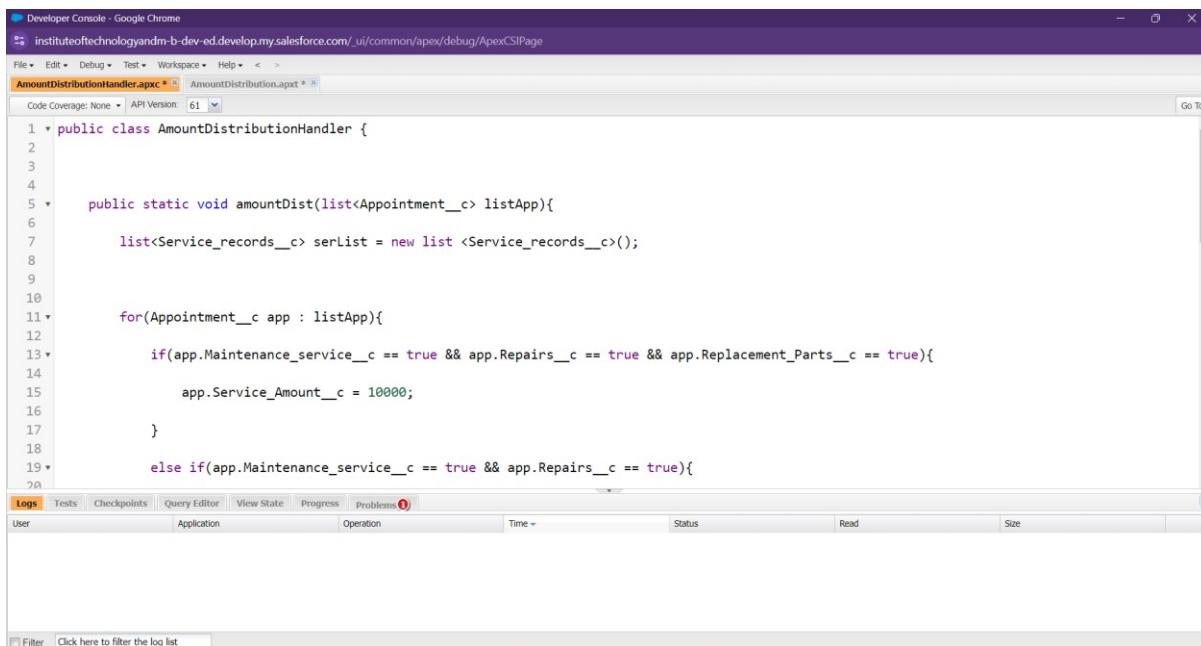
Apex handler

1. UseCase : This use case works for Amount Distribution for each Service the customer selected for there Vehicle.
2. Login to the respective trailhead account and navigate to the gear icon in the top right corner.
3. Click on the Developer console. Now you will see a new console window.
4. In the toolbar, you can see FILE. Click on it and navigate to new and create New apex class.
5. Name the class as “AmountDistributionHandler ”.

Trigger Handler :

How to create a new trigger :

1. While still in the trailhead account, navigate to the gear icon in the top right corner.
2. Click on 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



The screenshot shows the Salesforce Developer Console interface. The title bar reads "Developer Console - Google Chrome" and the URL is "institutetechnologyandm-b-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage". The main area displays the code for the "AmountDistributionHandler" class:

```
1 * public class AmountDistributionHandler {  
2  
3  
4  
5 *     public static void amountDist(list<Appointment__c> listApp){  
6  
7         list<Service_records__c> serList = new list <Service_records__c>();  
8  
9  
10        for(Appointment__c app : listApp){  
11            if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){  
12                app.Service_Amount__c = 10000;  
13            }  
14            else if(app.Maintenance_service__c == true && app.Repairs__c == true){  
15                app.Service_Amount__c = 5000;  
16            }  
17        }  
18    }  
19}  
20
```

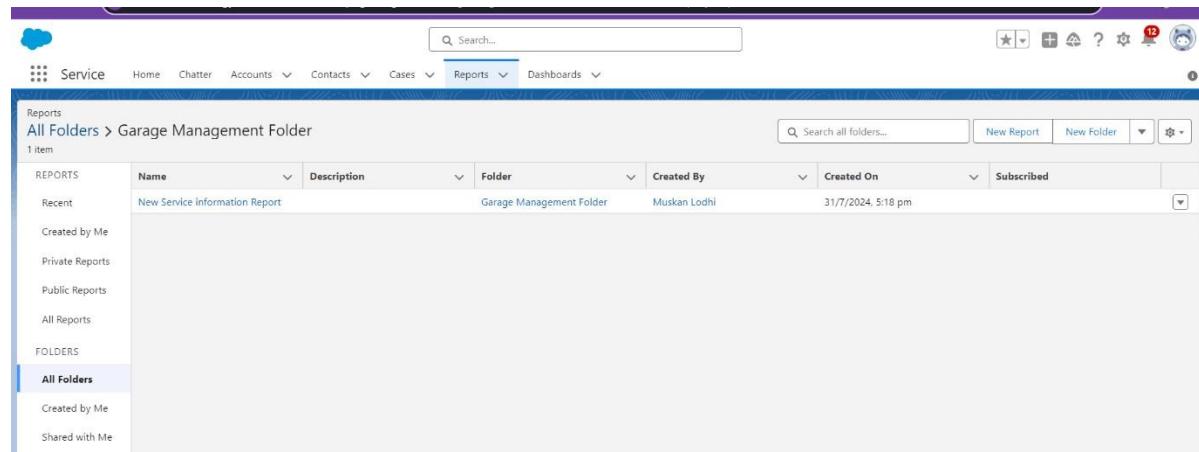
Below the code editor, there is a log viewer tab labeled "Logs" which is currently selected. The log table has columns for User, Application, Operation, Time, Status, Read, and Size. There are no entries in the log.

Task 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.

create a report folder

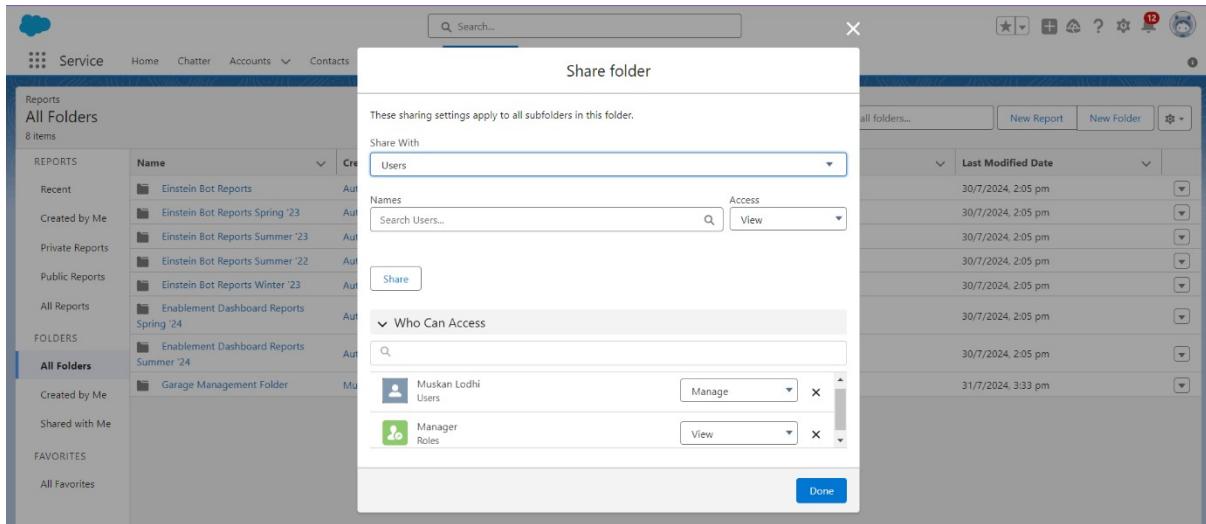
1. Click on the app launcher and search for reports.
2. Click on the report tab, click on new folder.
3. Give the Folder label as “Garage Management Folder”, Folder unique name will be auto populated.
4. Click save.



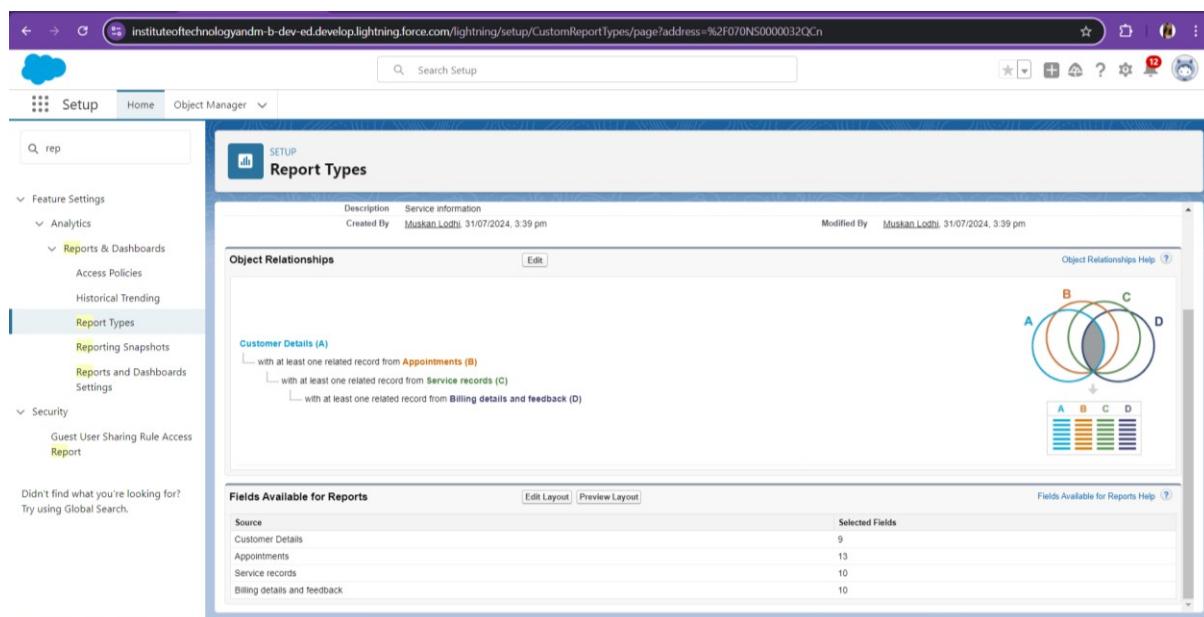
The screenshot shows the Salesforce Reports interface. The top navigation bar includes Service, Home, Chatter, Accounts, Contacts, Cases, Reports (which is currently selected), and Dashboards. A search bar at the top right contains the placeholder "Search...". Below the navigation is a sidebar with categories: Reports (Recent, Created by Me, Private Reports, Public Reports, All Reports), Folders (All Folders, Created by Me, Shared with Me). The main content area displays a table titled "All Folders > Garage Management Folder". The table has columns: Name, Description, Folder, Created By, Created On, and Subscribed. One item is listed: "New Service Information Report" under "Garage Management Folder" by "Muskan Lodhi" on "31/7/2024, 5:18 pm". There are also buttons for "Search all folders...", "New Report", and "New Folder".

| Name | Description | Folder | Created By | Created On | Subscribed |
|--------------------------------|-------------|--------------------------|--------------|--------------------|------------|
| New Service Information Report | | Garage Management Folder | Muskan Lodhi | 31/7/2024, 5:18 pm | |

Sharing a report folder



Create Report Type

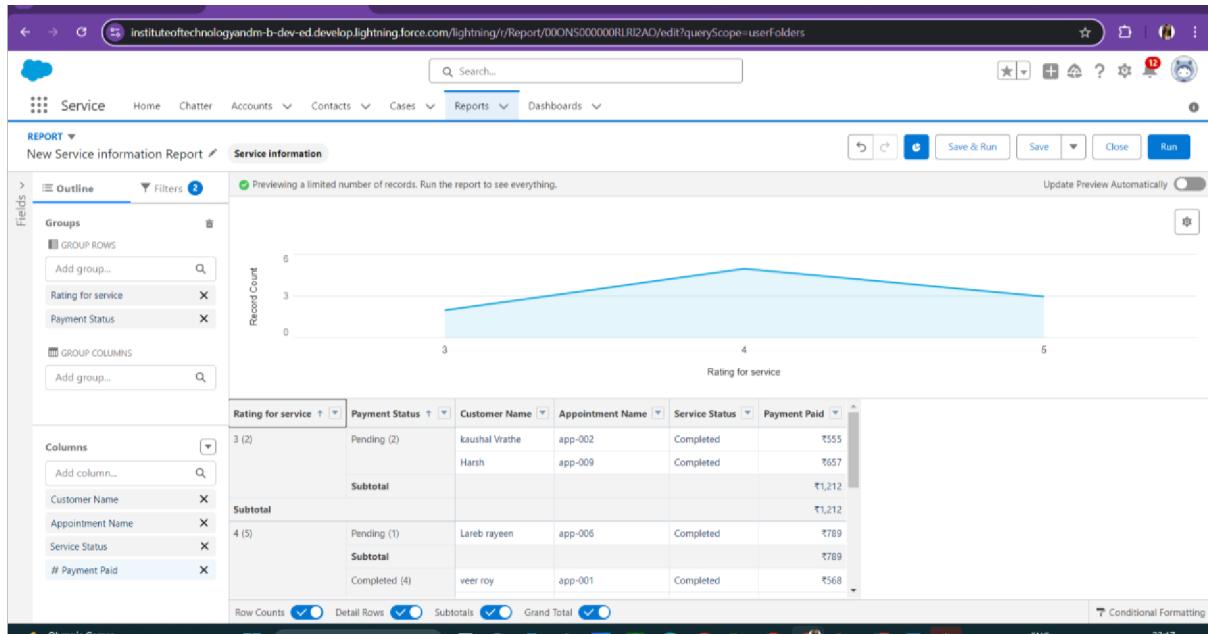


The screenshot shows the Salesforce Setup interface for creating a new Report Type. The left sidebar navigation includes 'Feature Settings' (Analytics, Reports & Dashboards, Report Types, Reporting Snapshots, Reports and Dashboards), 'Security' (Guest User Sharing Rule Access, Report), and a global search bar. The main content area displays the 'Report Types' setup page, which includes:

- Object Relationships:** A section showing relationships between Customer Details (A), Appointments (B), Service records (C), and Billing details and feedback (D). A Venn diagram illustrates the overlap between these objects.
- Fields Available for Reports:** A table listing fields from various sources and their counts:

| Source | Selected Fields |
|------------------------------|-----------------|
| Customer Details | 9 |
| Appointments | 13 |
| Service records | 10 |
| Billing details and feedback | 10 |

Create Report



Task 15: 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, form milestone 15, and activity 2, and provide the sharing settings for the folder that just created.

The screenshot shows the Salesforce Lightning interface. The top navigation bar includes links for Service, Home, Chatter, Accounts, Contacts, Cases, Reports, and Dashboards. The main content area is titled "All Folders > Service Rating". A search bar at the top right says "Search...". Below it is a table with columns: Name, Description, Folder, Created By, Created On, and Subscribed. One row is visible: "Customer review" under "Service Rating" by Muskan Lodhi on 31/7/2024, 5:25 pm. To the left of the main content is a sidebar with sections for Dashboards, Folders, and Favorites. The "All Folders" section is currently selected.

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.

The screenshot shows a dashboard titled "Customer review". It displays a line chart with the title "New Service information Report". The chart has "Rating for service" on the x-axis (values 3, 4, 5) and "Record Count" on the y-axis (values 0, 1, 2, 3, 4). There are two data series: "Pending" (blue line with circles) and "Completed" (red line with circles). The Pending series starts at (3, 2), goes down to (4, 1), and ends at (5, 3). The Completed series starts at (3, 2), goes down to (4, 1), and ends at (5, 2). The chart is set against a dark blue background with a light blue grid. At the bottom of the chart area, there is a link "View Report (New Service information Report)".

Thank you