

Garage Management system

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

1. Appointment Scheduling:

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

2. Vehicle Management:

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

3. Customer Relationship Management (CRM):

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

4. Inventory and Spare Parts Management:

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

5. Billing and Invoicing:

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

6. Work Order Management:

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

7. Reporting and Analytics:

- a. Provides insights into key performance indicators like revenue, job completion rates, and customer feedback.
- b. Helps identify trends and areas for improvement.

Salesforce

Introduction:

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

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

What Is Salesforce?

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

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

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

<https://youtu.be/r9EX3IGde5k>

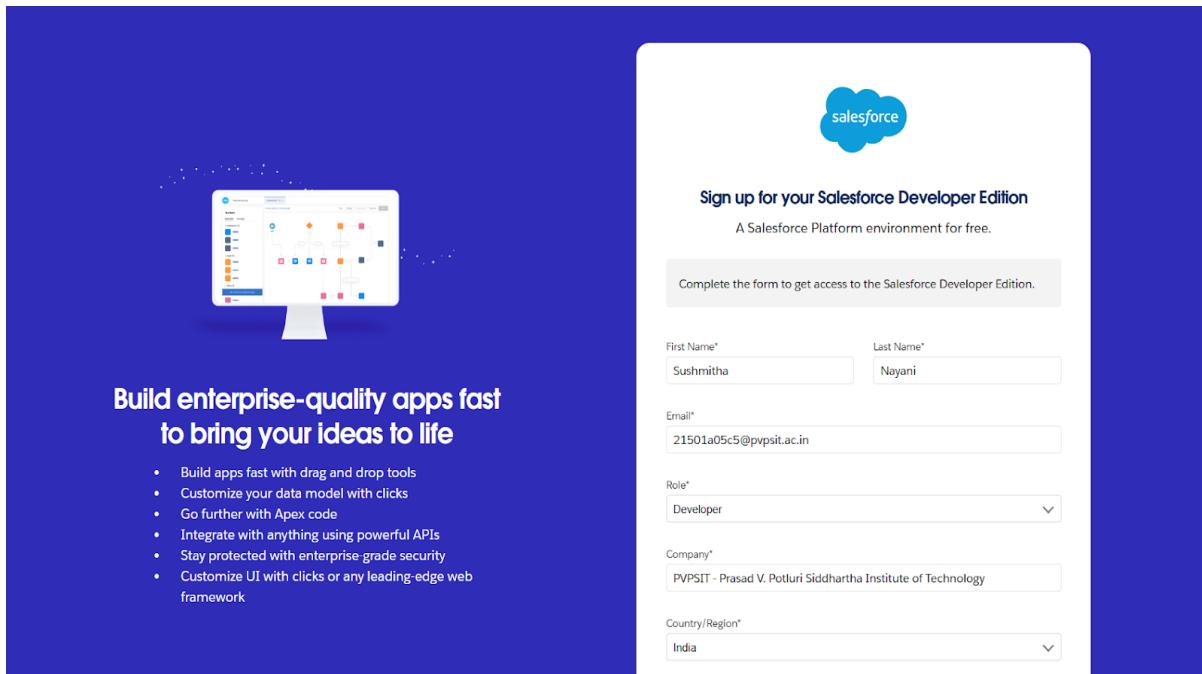
Creating Developer Account:

Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :
 - a. First name & Last name
 - b. Email
 - c. Role : Developer

- d. Company : College Name
- e. County : India
- f. Postal Code : pin code
- g. Username : should be a combination of your name and company This need not be an actual email id, you can give anythingin the format :
username@organization.com

Click on sign me up after filling these.



The image shows a dark blue background with a white rectangular sign-up form overlaid. In the top right corner of the blue area, there is a small white icon of a computer monitor displaying a network diagram.

Salesforce

Sign up for your Salesforce Developer Edition
A Salesforce Platform environment for free.

Complete the form to get access to the Salesforce Developer Edition.

First Name* Last Name*

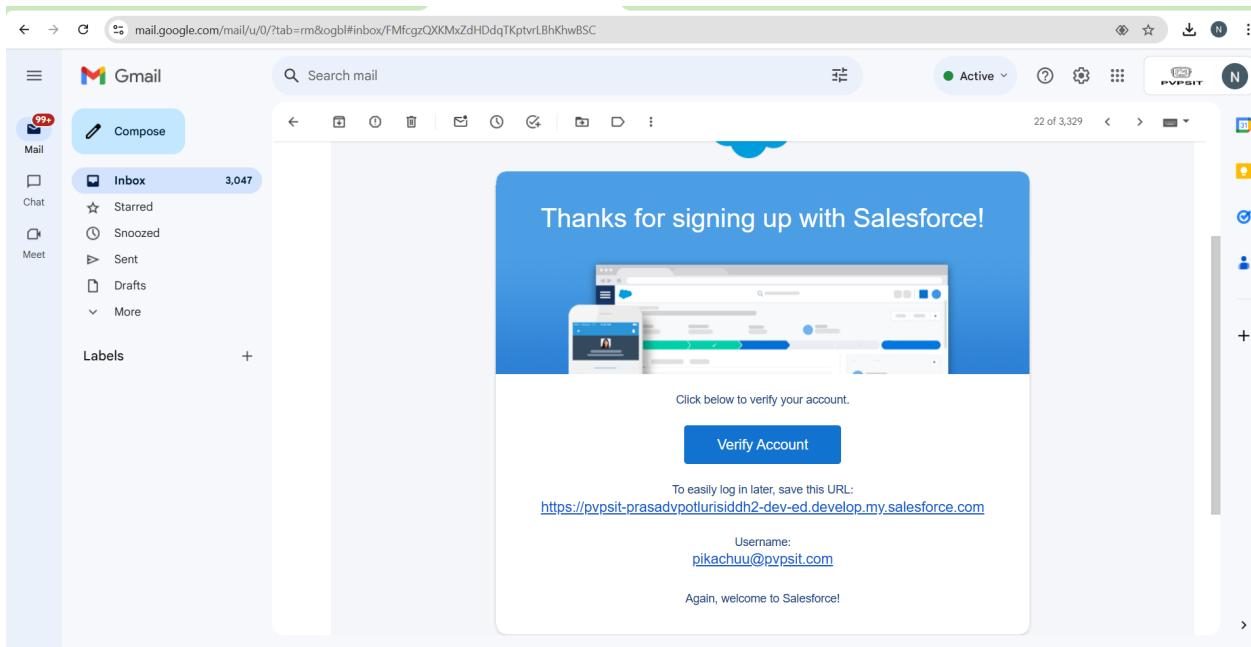
Email*

Role*

Company*

Country/Region*

Account Activation



OBJECT

What Is an Object?

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

Salesforce objects are of two types:

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

Create Customer 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 >> CustomerDetails
2. Plural label name >> Customer Details
3. Enter RecordName Label and Format
 - a. Record Name >> CustomerName
 - b. DataType >> Text
2. Click on Allow reports and Track FieldHistory,
3. Allow search >> Save.

Create Appointment Object

To create an object:

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

- a. Record Name >> Appointment Name
 - b. DataType >> Auto Number
 - c. Display Format >> app-{000}
 - d. Starting number >> 1
2. Click on Allow reports and Track FieldHistory,
3. Allow search >> Save.

The screenshot shows the 'New Custom Object' setup page in Salesforce. The 'Custom Object Definition Edit' section contains the following configuration:

- Custom Object Information:**
 - Label: Appointment
 - Plural Label: Appointments
 - Starts with vowel sound:
- Description:** A large text area labeled 'Description' is empty.
- Context-Sensitive Help Setting:**
 - Open the standard Salesforce.com Help & Training window
 - Open a window using a Visualforce page
- Content Name:**
- Enter Record Name Label and Format:**
 - Record Name: Appointment Name
 - Data Type: Auto Number
 - Display Format: app-{000} (Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.)
 - Starting Number: 1
- Optional Features:**
 - Allow Reports
 - Allow Activities
 - Track Field History
 - Allow in Chatter Groups
 - Enable Licensing
- Object Classification:**
 - When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more](#).
 - Allow Site Access
 - Allow Bulk API Access
 - Allow Streaming API Access
- Deployment Status:**
 - In Development
 - Deployed
- Search Status:**
 - When this setting is enabled, your users can find records of this object type when they search. [Learn more](#).
 - Allow Search
- Object Creation Options (Available only when custom object is first created):**
 - Add Notes and Attachments related list to default page layout
 - Launch New Custom Tab Wizard after saving this custom object

At the bottom right are three buttons: Save, Save & New, and Cancel.

Create Service records Object

To create an object:

From the setup page >> Click on ObjectManager >> 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
 - a. Record Name >> Service records Name

- b. DataType >> Auto Number
- c. Display Format >> ser-{000}
- d. Starting number >> 1

Click on Allow reports and Track FieldHistory,
Allow search >> Save.

New Custom Object

The screenshot shows the 'Custom Object Definition Edit' page in the Salesforce setup interface. The object name is 'Service records'. Key configuration settings include:

- Label:** Service records (Example: Account)
- Plural Label:** Service records (Example: Accounts)
- Object Name:** Service records (Example: Account)
- Description:** (Empty text area)
- Context-Sensitive Help Setting:** Open the standard Salesforce.com Help & Training window (selected)
- Content Name:** -None-
- Record Name:** Service recordsName (Example: Account Name)
- Data Type:** Auto Number (Warning: If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.)
- Display Format:** ser-{000} (Example: A-{00000} What is This?)
- Starting Number:** 1
- Optional Features:** Allow Reports, Allow Activities, Track Field History, Allow in Chatter Groups, Enable Licensing (unchecked)
- Object Classification:** When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. (Allow Sharing, Allow Bulk API Access, Allow Streaming API Access are checked)
- Deployment Status:** In Development (radio button)
- Search Status:** Allow Search (checkbox checked)
- Object Creation Options (Available only when custom object is first created):** Add Notes and Attachments related list to default page layout, Launch New Custom Tab Wizard after saving this custom object (checkboxes unchecked)

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 >> Billingdetails and feedback
2. Plural label name >> Billing details and feedback
3. Enter RecordName Label and Format
 - a. Record Name >> Billingdetails and feedbackName
 - b. DataType >> Auto Number
 - c. Display Format >> bill-{000}
 - d. Starting number >> 1
2. Click on Allow reports and Track FieldHistory,
3. Allow search >> Save.

New Custom Object

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

Custom Object Definition Edit

Save Save & New Cancel

Custom Object Information

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

Label: Example: Account

Plural Label: Example: Accounts

Starts with vowel sound:

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

Object Name: Example: Account

Description:

Context-Sensitive Help Settings

Open the standard Salesforce.com Help & Training window

Open a window using a Visualforce page

Content Name:

Enter Record Name Label and Format

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

Record Name: Example: Account Name

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

Display Format: Example: A-{0000} [What Is This?](#)

Starting Number:

Optional Features

Allow Reports

Allow Activities

Track Field History

Allow in Chatter Groups

Enable Licensing

Object Classification

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

Allow Sharing

Allow Bulk API Access

Allow Streaming API Access

Deployment Status

In Development

Deployed

Search Status

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

Allow Search

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

Add Notes and Attachments related list to default page layout

Launch New Custom Tab Wizard after saving this custom object

Save Save & New Cancel

Tabs

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

Types of Tabs:

1. Custom Tabs

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

2. Web Tabs

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

3. Visualforce Tabs

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

4. Lightning Component Tabs

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

5. Lightning Page Tabs

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

Creating a Custom Tab

To create a Tab:(Customer Details)

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

4. Click save.

Creating Remaining Tabs

1. Now create the Tabs for the remaining Objects, they are "Appointments, Service records, Billing details and feedback".
2. Follow the same steps as mentioned in Activity -1 .

The Lightning App

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

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

Create a Lightning App

To create a lightningapp 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 searchbar 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.

Welcome to Salesforce: Vi... Student - Skill Wallet Student - Skill Wallet App Manager | Salesforce (12) Garage Management (13) 01 How to Create Cu...

prasadvpoturisiddharth-22b-dev-ed.lightning.force.com/lightning/setup/NavigationMenus/home

Setup Home Object Manager

Search Setup

Lightning Experience App Manager

24 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type

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

26°C Mostly clear

ENG IN 21:27 16-11-2024

Fields

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

Types of Fields

1. Standard Fields
2. Custom Fields

Creation of fields for the Customer Details object

1. To create fields in an object:

- a. Go to setup >> click on ObjectManager >> type object name(Customer Details) in search bar >> click on the object.
- b. Now click on "Fields & Relationships" >> New
- c. Select Data Type as a "Phone"
- d. Click on next.
- e. Fill the Above as following:
 - i. FieldLabel: Phone number
 - ii. FieldName : gets auto generated
 - iii. Click on Next >> Next >> Save and new.

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

2. To create another fields in an object:

- a. Go to setup >> click on ObjectManager >> type object name(Customer Details) in search bar >> click on the object.
- b. Now click on "Fields & Relationships" >> New
- c. Select Data type as a "Email" and Click on Next
- d. Fill the Above as following:

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

The screenshot shows the Salesforce Object Manager interface for the 'Customer Details' object. The left sidebar has a 'Fields & Relationships' section selected. The main 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

Creation of Lookup Field on Appointment Object:

1. Go to setup>> click on Object Manager>> type objectname(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 Activity4 Before continuing.

Creation of Lookup Field on Service recordsObject :

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 relatedobject “ Appointment ” and click next.
5. Make it a required field so click on Required.
6. Scroll down for LookupFilter and click on Show filter settings.
7. Now add the filtercriteria.
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 Billingdetails and feedbackObject :

1. Go to setup>> click on Object Manager>> type objectname(Billing detailsand 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 relatedobject “ Servicerecords” and clicknext.
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 FieldLabel : 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.

Fields & Relationships
9 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD
Appointment Name	Name	Auto Number	
Created By	CreatedById	Lookup(User)	
Customer Details	Customer_Details__c	Lookup(Customer Details)	
Last Modified By	LastModifiedById	Lookup(User)	
Maintenance service	Maintenance_service__c	Checkbox	
Owner	OwnerId	Lookup(User,Group)	
Phone number	Phone_number__c	Phone	
Repairs	Repairs__c	Checkbox	
Replacement Parts	Replacement_Parts__c	Checkbox	

Creation of Checkbox Field on Service records Object :

1. Go to setup >> click on Object Manager >> type object name(Service records) 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

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The main title is 'Service records'. On the left, there's a sidebar with various layout-related options like 'Page Layouts', 'Lightning Record Pages', etc. The main content area is titled 'Fields & Relationships' and lists seven items. A table provides details for each field:

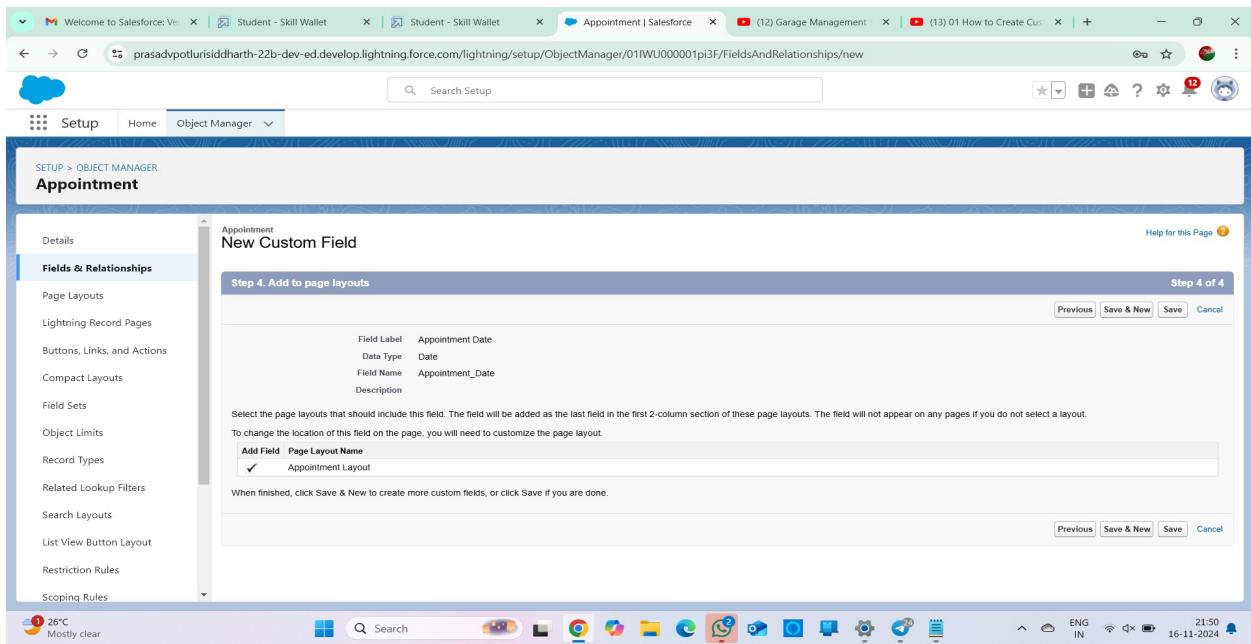
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment	Appointment__c	Lookup(Appointment)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone number	Phone_number__c	Phone		
Quality Check Status	Quality_Check_Status__c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

Creation of date Fields

Creation of Date Field on Appointment Object :

1. Go to setup >>click on Object Manager >>type object name(Appointment) in the search bar >> click on the object.
2. Now click on “Fields& Relationships” >>New.
3. Select “Date”as data type and clickNext.
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 checkbox.

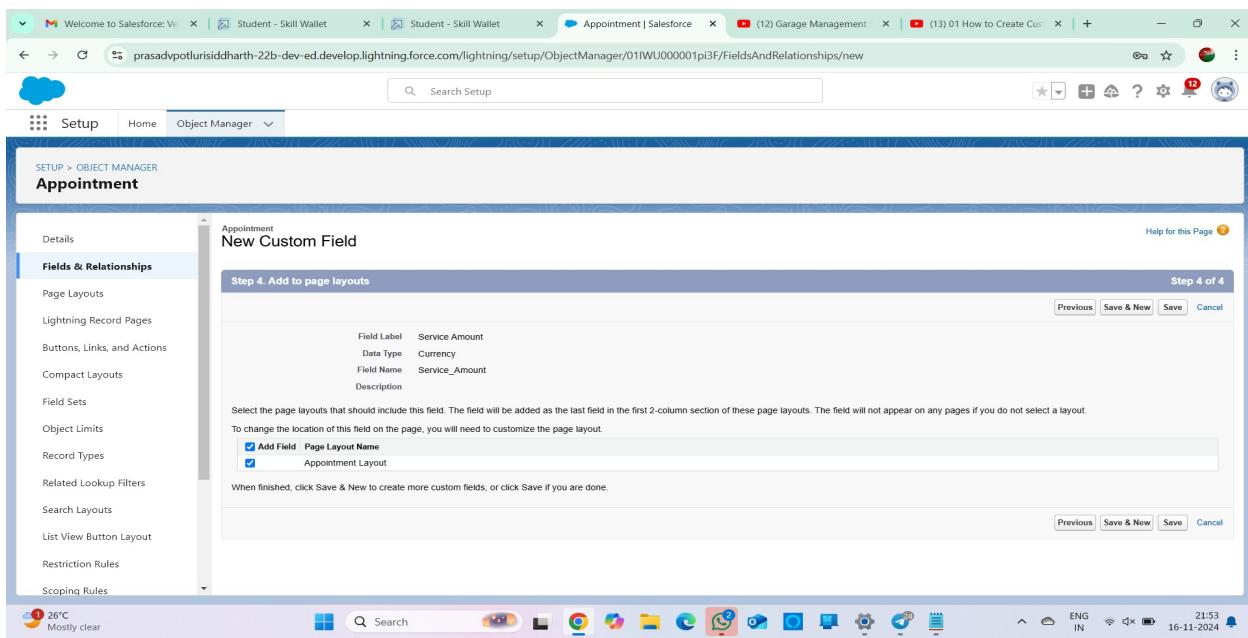
7. Click on next >>next >> save.



Creation of Currency Fields

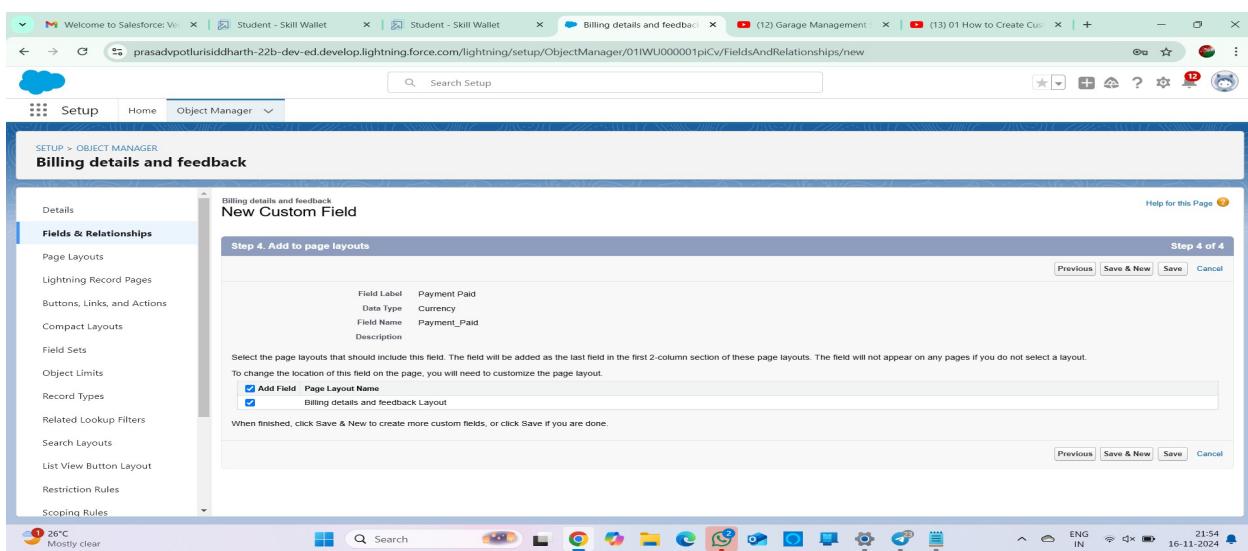
Creation of Currency Field on Appointment Object:

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 CurrencyField on Billingdetails and feedbackObject :

1. Follow the same steps as mentioned above in Billingdetails and feedbackObject.
2. Change the label name as mentioned.
3. Give the Field Label : PaymentPaid
4. Field Nme : is auto populated

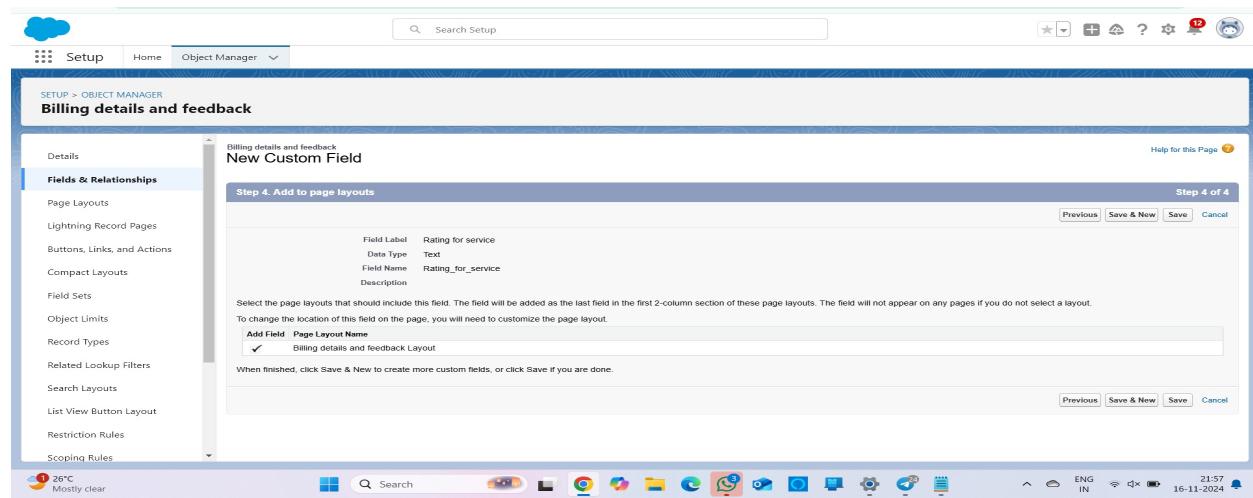


Creation of Text Fields

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 FieldLabel : Vehiclenumber 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 detailsand feedback object:

1. Go to setup >> click on Object Manager >> type object name(Billing detailsand 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



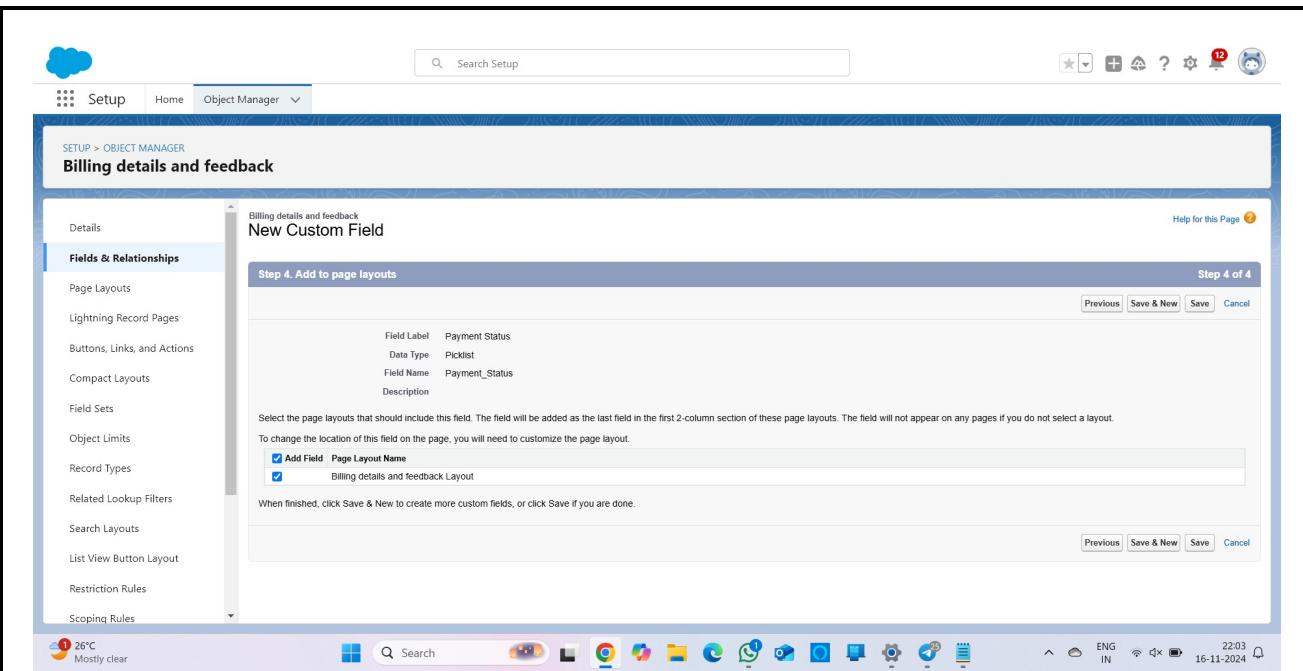
Creation of Picklist Fields

Creation of Picklist Fields in Service records object :

1. Go to setup >>click on ObjectManager >> type object name(Service records) in search bar >>click on the object.
2. Click on fields &relationship >> clickon 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 valuesare: Started, Completed.
6. Click Next.
7. Next >>Next >> Save.

Creation of Picklist Fieldsin Billing detailsand 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. Clickon fields &relationship >> clickon New.
3. Select Data type as “Picklist” and click Next.
4. Enter FieldLabel as “PaymentStatus”, under valuesselect “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 ObjectManager >> type object name(Service records) in search bar >> click on the object.
2. Click on fields &relationship >> clickon New.
3. Select Data type as “Formula” and click Next.
4. Give Field Label and Field Name as “servicedate” 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 with the following details:

Header: Search Setup, Home, Object Manager

Breadcrumbs: SETUP > OBJECT MANAGER

Section: Service records

Left Sidebar:

- Details
- Fields & Relationships** (selected)
- Page Layouts
- Lightning Record Pages
- Buttons, Links, and Actions
- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules

Fields & Relationships Table:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment	Appointment__c	Lookup(Appointment)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone number	Phone_number__c	Phone		
Quality Check Status	Quality_Check_Status__c	Checkbox		
service date	service_date__c	Formula (Date)		
Service recordsName	Name	Auto Number		✓

Bottom Bar:

- 26°C Mostly clear
- Search
- Cloud
- File
- Google Chrome
- Folder
- Microsoft Edge
- WhatsApp
- OneDrive
- Power BI
- Settings
- Help
- Logout

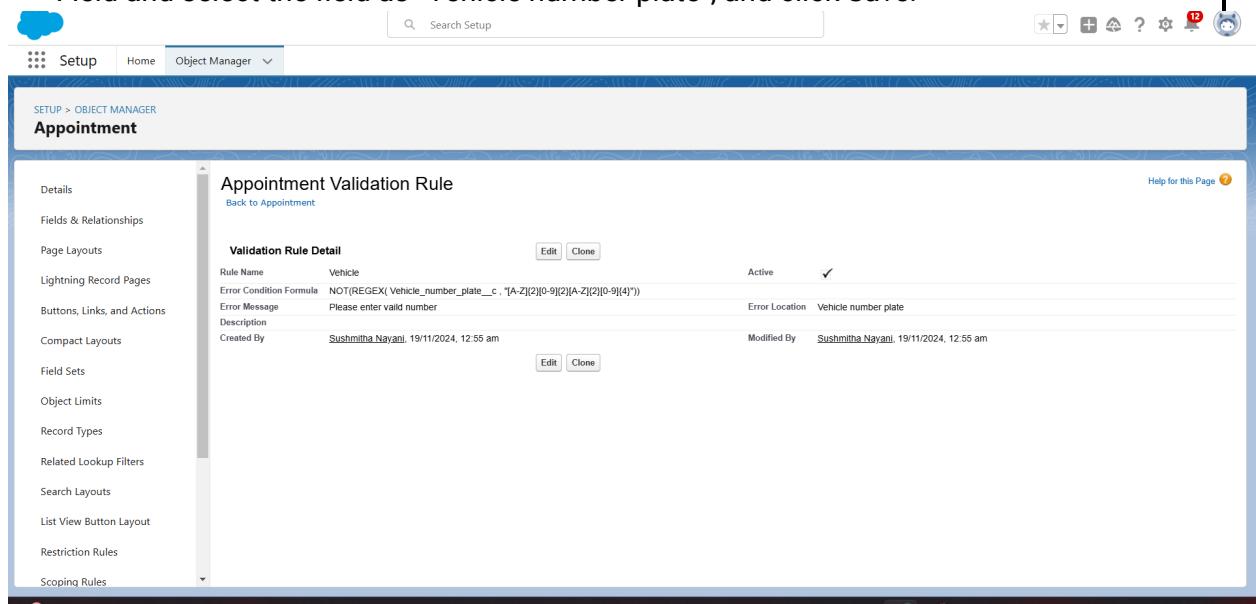
System status: ENG IN 22:07 16-11-2024

Validation rule

Validation rules are applied when a user tries to save a record and are used to check if the datameets specified criteria. If the criteriaare 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 objectmanager >> 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 Formulaas :-
 1. NOT(REGEX(Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))
6. Enter the Error Messageas "Please enter valid number ", select the Error location as Field and select the field as "Vehicle number plate", and click Save.



To create a validation rule to an Service recordsObject

1. Go to the setup page >> click on objectmanager >> 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 Formulaas :-

NOT(ISPICKVAL(Service_Status__c , "Completed"))

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

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar labeled 'Search Setup'. On the far right are various icons for account management. The main content area has a blue header bar with 'SETUP > OBJECT MANAGER' and 'Service records'. Below this, the left sidebar lists various object configuration options like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The main panel displays the 'Service records Validation Rule' configuration screen. It shows the 'Validation Rule Detail' section with the following details:

- Rule Name: service_status_note
- Error Condition Formula: NOT(ISPICKVAL(Service_Status__c , "Completed"))
- Error Message: still it is pending
- Description: (empty)
- Created By: Sushmitha Nayani, 19/11/2024, 12:56 am
- Modified By: Sushmitha Nayani, 19/11/2024, 12:56 am

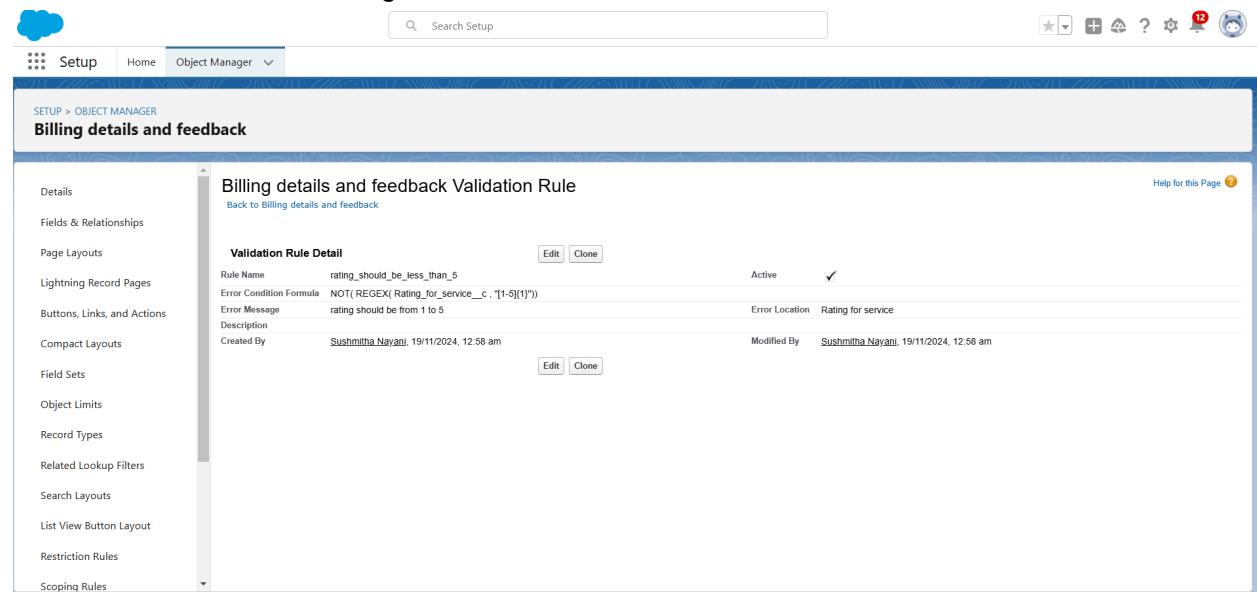
At the bottom of the main panel are 'Edit' and 'Clone' buttons. The top right corner of the main panel has a 'Help for this Page' link.

To create a validation rule to an Billing detailsand feedback Object

1. Go to the setup page >> clickon object manager>> From drop down clickedit 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 Formulaas :-

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

Enter the Error Messageas "rating shouldbe from 1 to 5", select the Error locationas Field and select the field as "Rating for Service", and click Save.



Duplicate rule

To create a matching rule to an Customer detailsObject

1. Go to quick find box in setup and search for matching Rule.
2. Click on matchingrule >> clickon New Rule.
3. Select the objectas Customer detailsand click Next.
4. Give the Rule name : Matchingcustomer details
5. Unique name : is auto populated
6. Define the matching criteria as
7.

Field	MatchingMethod
a. Gmail	Exact
b. Phone Number	Exact
8. Click save.
9. After Saving Click on Activate.

To create a Duplicaterule to an Customer detailsObject

1. Go to quick find box in setup and search for Duplicate rules.
2. Click on Duplicate rule >> clickon New Rule >> selectcustomer details object.
3. Give the Rule name as : Customer Detailduplicate
4. Scroll a littlein Matching rule section
5. Select the matching rule : Matchingcustomer details
6. And Click on save.
7. After saving the Duplicate Rule, Click on Activate.

Setup Home Object Manager ▾

Search Setup

duplicate

v Data

- Duplicate Management
- Duplicate Error Logs
- Duplicate Rules**
- Matching Rules

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

d Duplicate Rules

Customer Details Duplicate Rule
Customer Detail duplicate

Help for this Page

Duplicate Rule Detail

Rule Name	Customer Detail duplicate	Order	1 of 1 [Reorder]
Description	Customer Details	Operations On Create	<input checked="" type="checkbox"/> Alert <input checked="" type="checkbox"/> Report
Object	Customer Details	Operations On Edit	<input type="checkbox"/> Alert <input type="checkbox"/> Report
Record-Level Security	Enforce sharing rules		
Action On Create	Allow		
Action On Edit	Allow		
Alert Text	Use one of these records?		
Active	✓		
Matching Rule	<input checked="" type="checkbox"/> Matching customer details <input checked="" type="checkbox"/> Mapped	Matching Criteria	(Customer Details: Gmail EXACT MatchBlank = FALSE) AND (Customer Details: Phone_number EXACT MatchBlank = FALSE)
Conditions		Modified By	Sushmitha Nayani, 19/11/2024, 1:00 am
Created By	Sushmitha Nayani, 19/11/2024, 1:00 am		

Actions: Edit | Delete | Clone | Deactivate

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

To create a new profile:

- a. Goto setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (Manager) >> Save.
- b. While still on the profile page, then click Edit.
- c. Select the Custom App settings as default for the Garage management.
- d. 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.
- e. Changing the session timeout after should be "8 hours of inactivity".
- f. Change the password policies as mentioned :
- g. User passwords expire in should be "never expires".
- h. Minimum password length should be "8", and click save.



Manager

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.

[Login IP Ranges \(0\)](#) | [Enabled Apex Class Access \(0\)](#) | [Enabled Visualforce Page Access \(0\)](#) | [Enabled External Data Source Access \(0\)](#) | [Enabled Named Credential Access \(0\)](#) | [Enabled External Credential Principal Access \(0\)](#) |
[Enabled Custom Metadata Type Access \(0\)](#) | [Enabled Custom Setting Definitions Access \(0\)](#) | [Enabled Flow Access \(0\)](#) | [Enabled Service Presence Status Access \(0\)](#) | [Enabled Custom Permissions \(0\)](#)

Profile Detail

Name	Manager	Edit		Clone	Delete	View Users
User License	Salesforce					Custom Profile <input checked="" type="checkbox"/>
Description						
Created By	Sushmitha Nayani, 19/11/2024, 1:01 am					Modified By Sushmitha Nayani, 19/11/2024, 1:03 am

Page Layouts

Standard Object Layouts

Global	Global Layout [View Assignment]	Invoice	Invoice Layout [View Assignment]
Email Application	Not Assigned [View Assignment]	Invoice Line	Invoice Line Layout [View Assignment]
Home Page Layout	DE Default [View Assignment]	Lead	Lead Layout [View Assignment]
Account	Account Layout [View Assignment]	Legal Entity	Legal Entity Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Location	Location Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Location Group	Location Group Layout [View Assignment]

Sales person Profile

1. Goto setup >>type profiles in quick find box >>click on profiles>> clone the desiredprofile (Salesforce PlatformUser) >> enter profile name (sales person) >> Save.
2. While still on the profilepage, 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 detailsand 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 'Profiles' tab selected. A search bar at the top contains 'profiles'. On the left, a sidebar shows 'Users' and 'Profiles' under 'Profiles'. The main area displays the 'Profile' for 'sales person'. It includes fields for Name (sales person), User License (Salesforce Platform), Description, Created By (Sushmitha Nayani), Modified By (Sushmitha Nayani), and a 'Custom Profile' checkbox which is checked. Below this is a 'Page Layouts' section titled 'Standard Object Layouts' with a table mapping object types to page layouts:

Object Type	Global Layout	Fulfillment Order Item Tax
Email Application	Not Assigned	Not Assigned
Home Page Layout	Home Page Default	Idea
Account	Account Layout	Individual
Alternative Payment Method	Alternative Payment Method Layout	Invoice
Appointment Invitation	Appointment Invitation Layout	Invoicing Line

Role & Role Hierarchy

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

Creating Manager Role

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

The screenshot shows the Salesforce Setup interface for creating a new role. The left sidebar is collapsed, and the main area displays the 'Roles' page. A search bar at the top right contains the text 'Search Setup'. The main content area has a header 'Roles' with a blue icon. Below the header, the role is identified as 'Manager'. A note states: 'Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.' It also mentions the hierarchy: 'PVP-SIT - Prasad V. Poluri Siddhartha Institute of Technology > Manager' and 'Siblings: SVP Sales & Marketing, SVP Customer Service & Support, CFO, SVP Human Resources, COO'. A 'Role Detail' section shows the role reports to 'CEO' and was modified by 'Sushmitha Nayak' on 19/11/2024, 1:06 am. It also lists 'Opportunity Access' and 'Case Access'. A 'Users in Manager Role' section shows one user assigned: 'Niklaus Mikaelson' (Full Name: Niklaus Mikaelson, Alias: nmika, Username: nick@mick.com, Active: checked). Buttons for 'Edit' and 'Delete' are visible above the user list.

Creating another roles

- a. Go to quick find >> Search for Roles >> click on set up roles.

- b. Click plus on CEO role, and click add role under manager.
- c. Give Label as “sales person” and Role name gets auto populated. Then click on Save.

The screenshot shows the Salesforce Setup Roles page. On the left, the navigation sidebar is visible with sections like Users, Feature Settings, Sales, Service, and Case Teams. The 'Roles' section is selected. The main content area displays a role detail for 'sales person'. The 'Label' field is set to 'sales person'. The 'Role Name' field is automatically populated as 'sales_person'. Under 'Role Detail', there are sections for This role reports to (Manager), Modified By (Sushmitha Nayani), Opportunity Access, and Case Access. Below this, a table titled 'Users in sales person Role' lists three users: shanmukh.palla, bhavana.Nayani, and ravichandhra.nayani. Each user has an 'Edit' button, an 'Assign Users to Role' button, and a 'New User' button. The 'Active' column for all users shows a checkmark. At the top right of the main content area, there is a 'Help for this Page' link.

Action	Full Name	Alias	Username	Active
Edit	shanmukh.palla	spall	shan@sush.com	✓
Edit	bhavana.Nayani	bnaya	bhavan@nayan.com	✓
Edit	ravichandhra.nayani	pnaya	ravi@sush.com	✓

Users

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

Create User

1. Go to setup >> type users in quick find box >> select users >> click New user.
2. Fill in the fields
 - a. First Name : Niklaus
 - b. Last Name : Mikaelson
 - c. Alias : Give a Alias Name
 - d. Email id : Give your Personal Email id
 - e. Username : Username should be in this form: text@text.text
 - f. Nick Name : Give a Nickname
 - g. Role : Manager
 - h. User licence : Salesforce
 - i. Profiles : Manager
3. Save

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. On the left sidebar, under the 'Users' section, 'Prospector Users' is highlighted. The main content area displays the 'User Detail' page for a user named 'Niklaus Mikaelson'. The page includes fields for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, and various license and permission checkboxes. A toolbar at the top provides options like Edit, Sharing, Reset Password, Freeze, and View Summary.

creating another users

1. Repeat the steps and create another user using
 - a. Role : sales person
 - b. User licence : Salesforce Platform
 - c. Profile : sales person

Note : create atleast 3 users with these permissions.

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

Setup Home Object Manager

Search Setup

Users

User Sushmitha Nayani

Role: Salesforce, System Administrator

Profile: Active, Marketing User, Offline User, Flow User, Service Cloud User

Address: IN, Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata)

Locale: English (India), Language: English

Delegated Approver: Manager

Receive Approval Request Emails: Only if I am an approver

Federation ID

Mobile Push Registrations: View

Site.com Contributor User, Site.com Publisher User, WDC User

Data.com User Type: Manager

Accessibility Mode (Classic Only), Debug Mode

High-Contrast Palette on Charts

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 Lightning Setup interface. The top navigation bar includes links for Home, Object Manager, and a search bar labeled 'Search Setup'. On the left, there's a sidebar with 'Users' and 'Public Groups' selected. The main content area has a header 'SETUP Public Groups' with a 'sales team' icon. Below the header, the group details are listed:

Label	sales team
Group Name	sales_team
Grant Access Using Hierarchies	<input checked="" type="checkbox"/>
Description	(empty)
Created By	Sushmitha Nayani, 19/11/2024, 1:14 am
Modified By	Sushmitha Nayani, 19/11/2024, 1:14 am

A 'View All Users' button is at the bottom of the list. The URL in the browser is `pvpst-prasadypoturisiddh2-dev-ed.lightning.force.com/lightning/setup/PublicGroups/page?address=%2Fsetup%2Fown%2Fgroupdetail.jsp%3Fid%3D00GdL000008A9Wr`.

Sharing Setting

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

Organization-Wide Default (OWD) Settings:

These settings define the default level of access for all objects within your Salesforce org. OWD settings include Private, Public Read-Only, Public Read/Write, and Controlled by Parent. OWD settings can be configured for each standard and custom object.

Role Hierarchy:

Salesforce uses a role hierarchy to determine record access.

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

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

Profiles and Permission Sets:

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

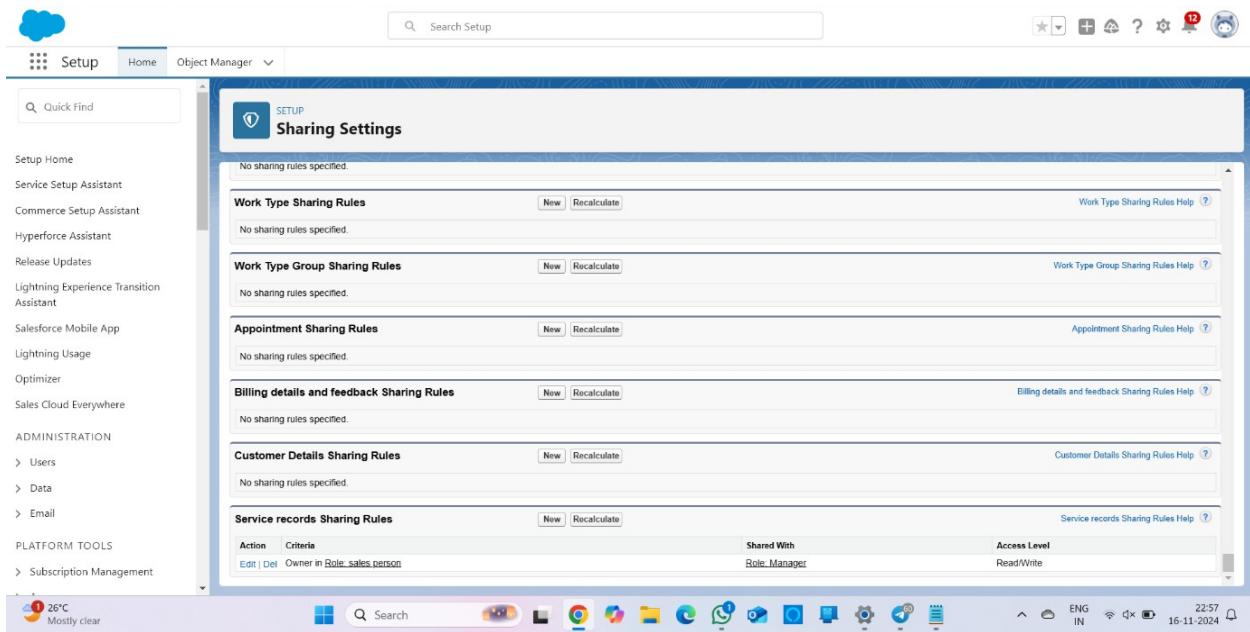
Profiles are typically used to grant general object and field access, while permission sets can be used to extend those permissions to specific users.

Creating Sharing settings

1. Go to setup >> type users in quick find box >> select Sharing Settings >> click Edit.
2. Change the OWD setting of the ServiceRecords Object to private as shown in fig.
3. Click on save and refresh.
4. Scroll down a bit, Click new on ServiceRecords sharing Rules.
5. Give the Label name as "Sharingsetting"

6. Rule name is auto populated.
7. In step 3 : Select which records to be shared, members of “ Roles ” >> “ Sales person ”
8. In step 4: share with, select “ Roles ” >> “ Manager ”
9. In step 5 : Change the access level to “ Read / write ”.

10. Click on save.



Flows

Create a Flow

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

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

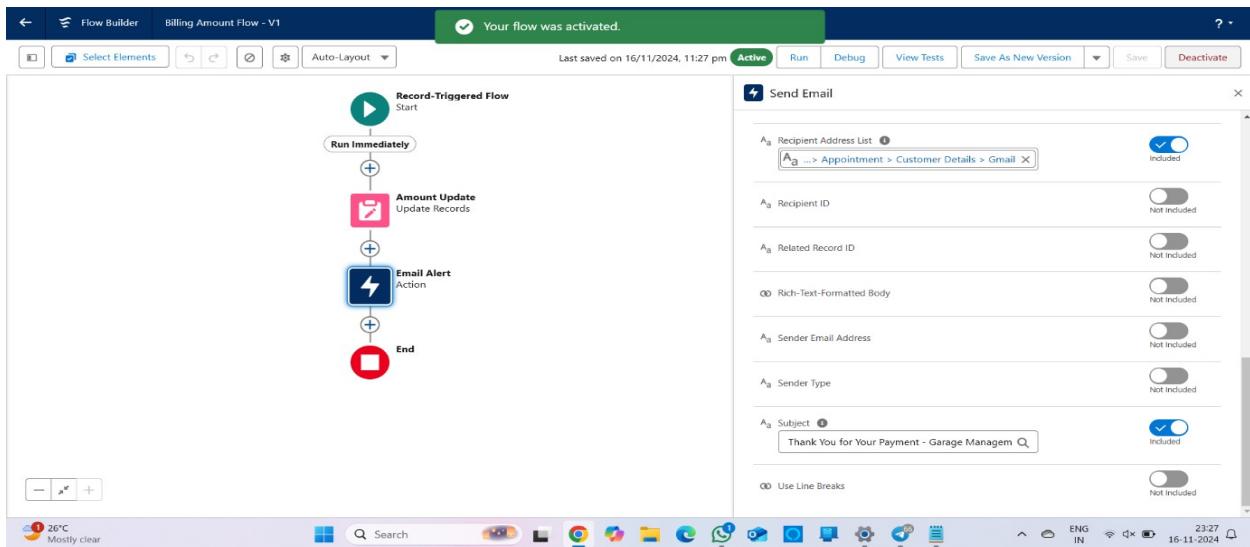
I hope this message finds you well. I wanted to take a moment to express my sincere gratitude for your recent payment for the services provided by our garage management team. Your prompt payment is greatly appreciated, and it helps us continue to provide top-

notchservices to you and all our valued customers.

Amount paid : {!\$Record.Payment_Paid_c}

Thank you for Coming .

1. Click done.
2. Now Click on Add Element, select Action.
3. Their action bar will be opened in that search for " send email " and click on it.
4. Give the labelname as " Email Alert"
5. API name will be auto populated.
6. Enable the body in set inputvalues for the selected action.
7. Select the text template that created , Body : {!alert}
8. Include recipient addresslist select the email form the record.
9. RecipientAddressList:
 {!\$Record.Service_records_r.Appointment_r.Customer_Name_r.Gmail_c}
10. Include subject as " Thank You for Your Payment - Garage Management".
11. Click done.
12. Click on save. Give the Flow label , Flow Api name will be autopopulated.
13. And click save, and click on activate.



Apex Trigger

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

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

- a. insert
- b. update
- c. delete
- d. merge
- e. upsert
- f. undelete

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

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

There are primarily two types of Apex Triggers:

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

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

Apex handler

Use Case : This use case works for Amount Distribution for each Service the customer selected for their Vehicle.

1. Login to the respective trailhead account and navigate to the gear icon in the top right corner.

2. Click on the Developerconsole. Now you will see a new console window.
3. In the toolbar,you can see FILE. Clickon it and navigate to new and create New apex class.
4. Name the class as "AmountDistributionHandler".

```

1 * public class AmountDistributionHandler {
2
3     public static void amountDist(list<Appointment__c> listApp){
4         list<Service_records__c> serlist = new list <Service_records__c>();
5
6         for(Appointment__c app : listApp){
7             if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){
8                 app.Service_Amount__c = 10000;
9             }
10            else if(app.Maintenance_service__c == true && app.Repairs__c == true){
11                app.Service_Amount__c = 5000;
12            }
13            else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
14                app.Service_Amount__c = 8000;
15            }
16            else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
17                app.Service_Amount__c = 7000;
18            }
19            else if(app.Maintenance_service__c == true){
20                app.Service_Amount__c = 2000;
21            }
22            else if(app.Repairs__c == true){
23                app.Service_Amount__c = 3000;
24            }
25            else if(app.Replacement_Parts__c == true){
26                app.Service_Amount__c = 5000;
27            }
28        }
29    }
30 }
31

```

Code:

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

```
    app.Service_Amount_c = 5000;  
}  
  
}  
}  
}
```

Trigger Handler :

How to create a new trigger:

1. While still in the trailhead account, navigate to the gear icon in the top right corner.
2. Click on 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 triggername and the object to be triggered.
5. Name : AmountDistribution
6. sObject : Appointment_c

Syntax For creatingtrigger :

The syntax for creatingtrigger is :

Trigger [triggername] on [objectname](Before/After event)

```
{  
}
```

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

Code:

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

Developer Console - Google Chrome

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

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

AmountDistributionHandler.apxc [] AmountDistribution.apxt []

Code Coverage: None ▾ API Version: 62 ▾ Go To

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

Reports

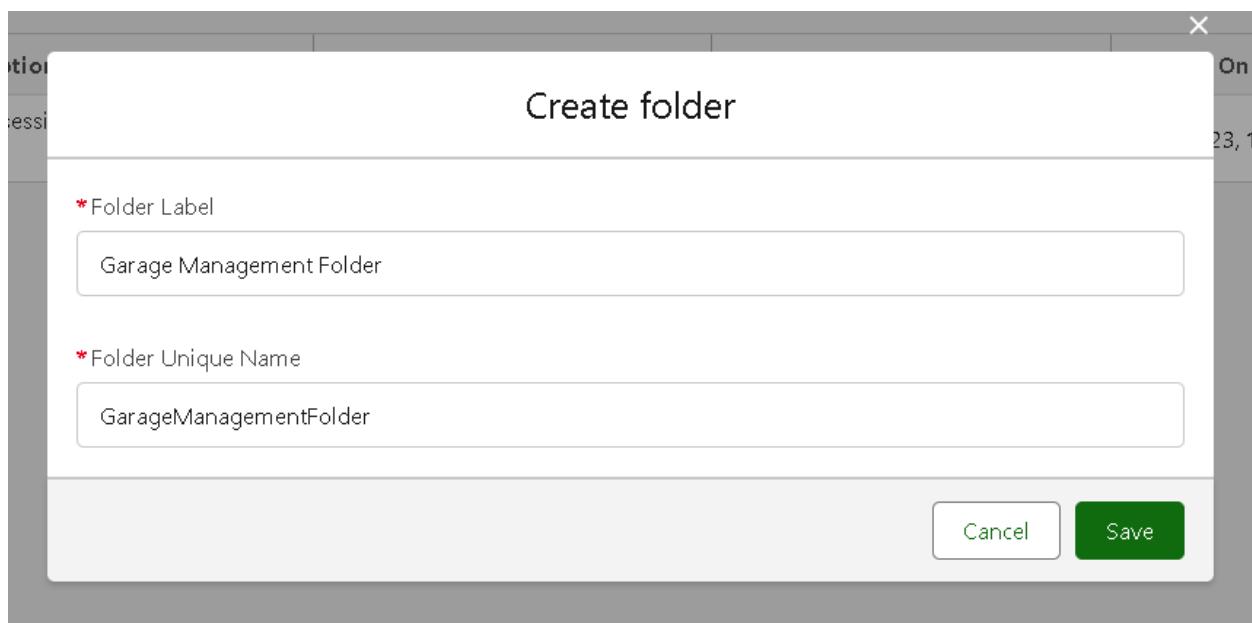
Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

Types of Reports in Salesforce

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

create a report folder

1. Click on the app launcher and search for reports.
2. Click on the report tab, click on new folder.
3. Give the Folderlabel as "GarageManagement Folder", Folderunique name will be auto populated.
4. Click save.

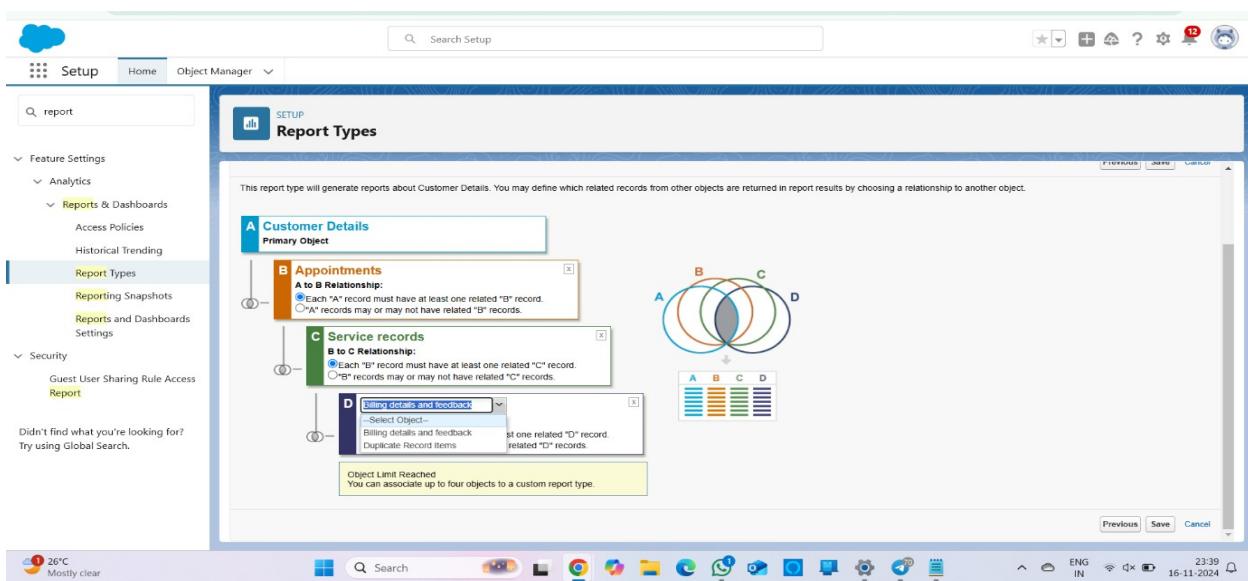


Sharing a report folder

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

Create Report Type

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



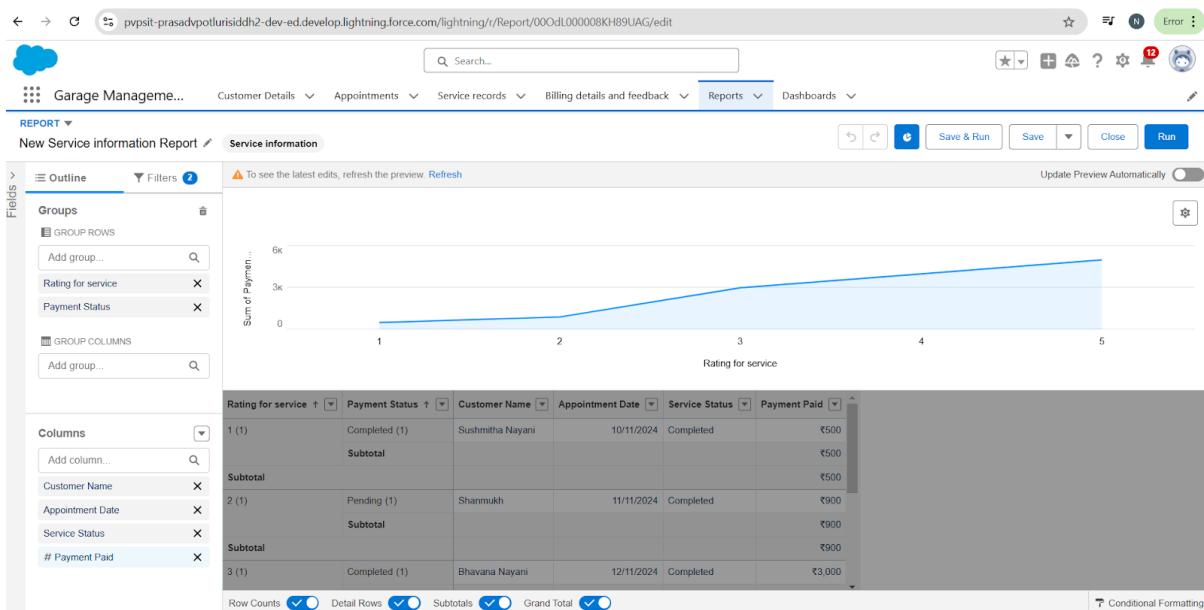
Create Report

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

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

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

- f. Select the fields that mentioned below in GROUP ROWS section.
- Rating for Service
- g. Select the fields that mentioned below in GROUP ROWS section.
- Payment Status
- h. Click on Add Chart , Select the Line Chart.
- i. Click on save, Give the reportName : New Service information Report
- j. Report unique Name is auto populated.
- k. Select the folder the created and Click on save.

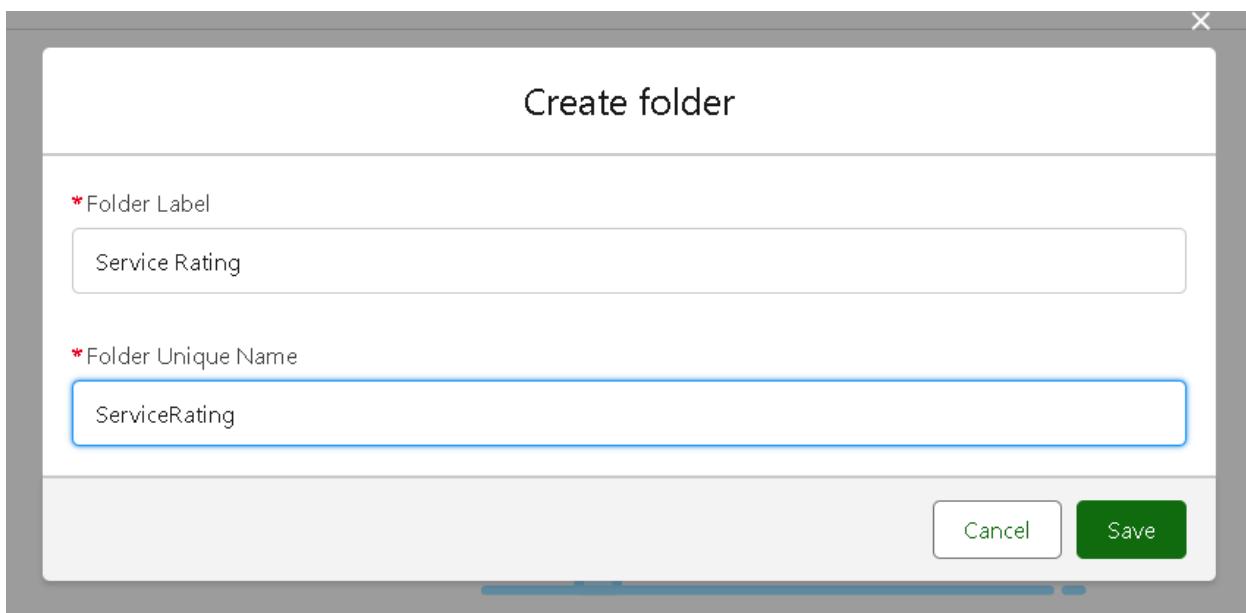


Dashboards

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

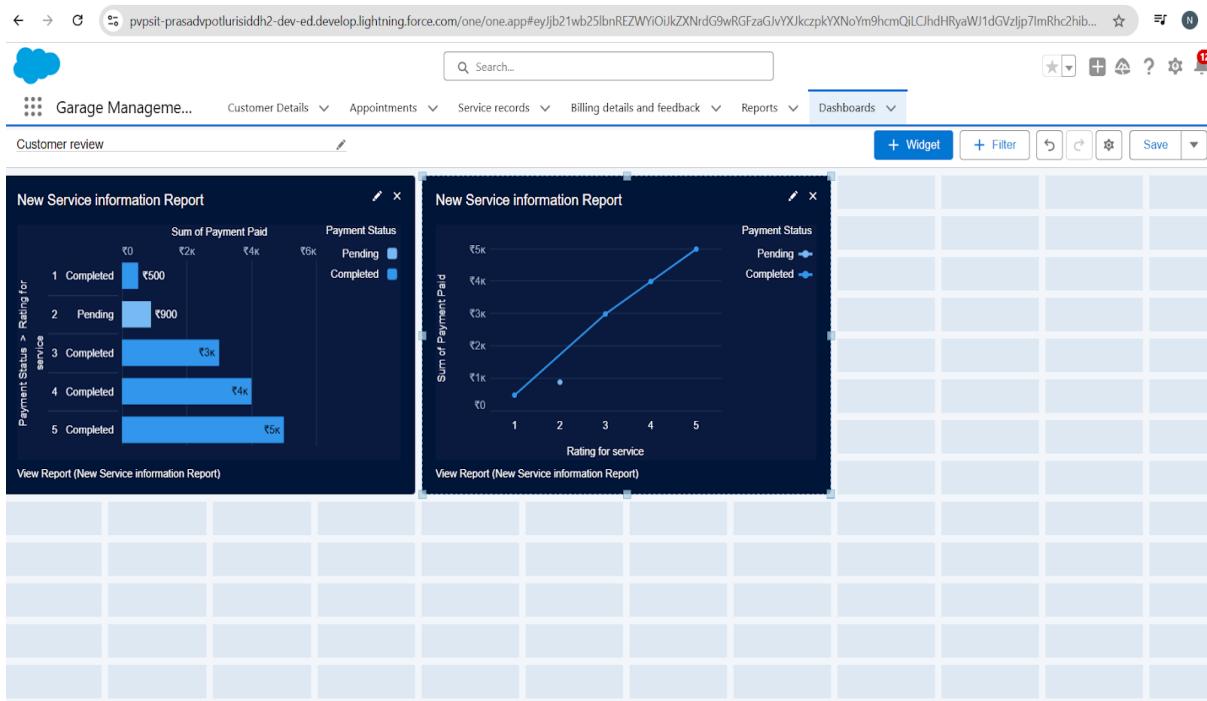
Create Dashboard Folder

1. Click on the app launcher and search for dashboard.
2. Click on dashboard tab.
3. Click new folder, give the folder label as "Service Rating dashboard".
4. Folder unique name will be auto populated.
5. Click save.
6. Follow the same steps, from milestone 15, and activity2, and provide the sharing settings for the folder that just created.



Create Dashboard

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



Subscription:

1. After that Click on Subscribeon top right.
2. Set the Frequency as " weekly".
3. Set a day as monday.
4. And Click on save.

