

Garage Management system

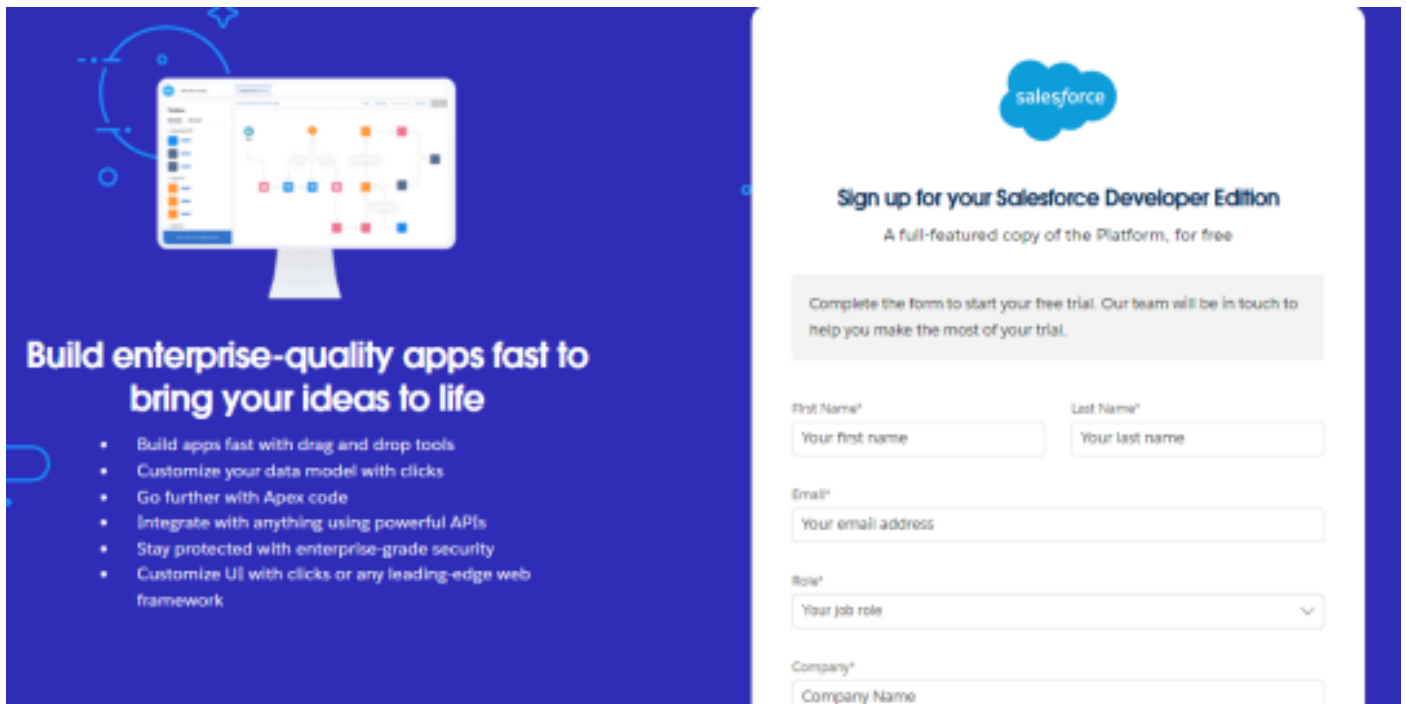
The Garage Management System is a valuable tool for automotive repair facilities, helping them deliver top-notch service, increase operational efficiency, and build lasting customer relationships. With its user-friendly interface and powerful features, GMS empowers garages to thrive in a competitive market while ensuring a seamless and satisfying experience for both customers and staff.

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 :



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

- Build apps fast with drag and drop tools
- Customize your data model with clicks
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- Integrate with anything using powerful APIs
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Sign up for your Salesforce Developer Edition
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Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name*

Last Name*

Email*

Role*

Company*

1. First name & Last name

2. Email

3. Role : Developer

4. Company : College Name

5. Country : India

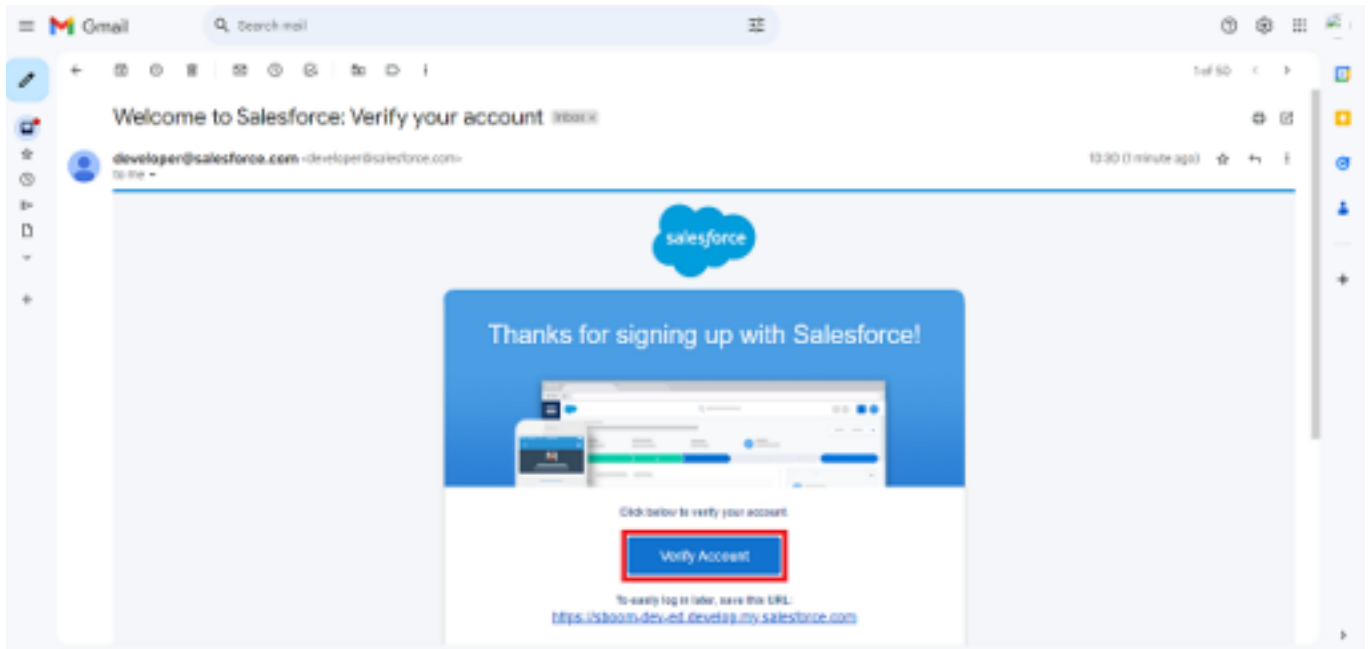
6. Postal Code : pin code

7. Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format :
username@organization.com , Click on sign me up after filling these.

Account Activation

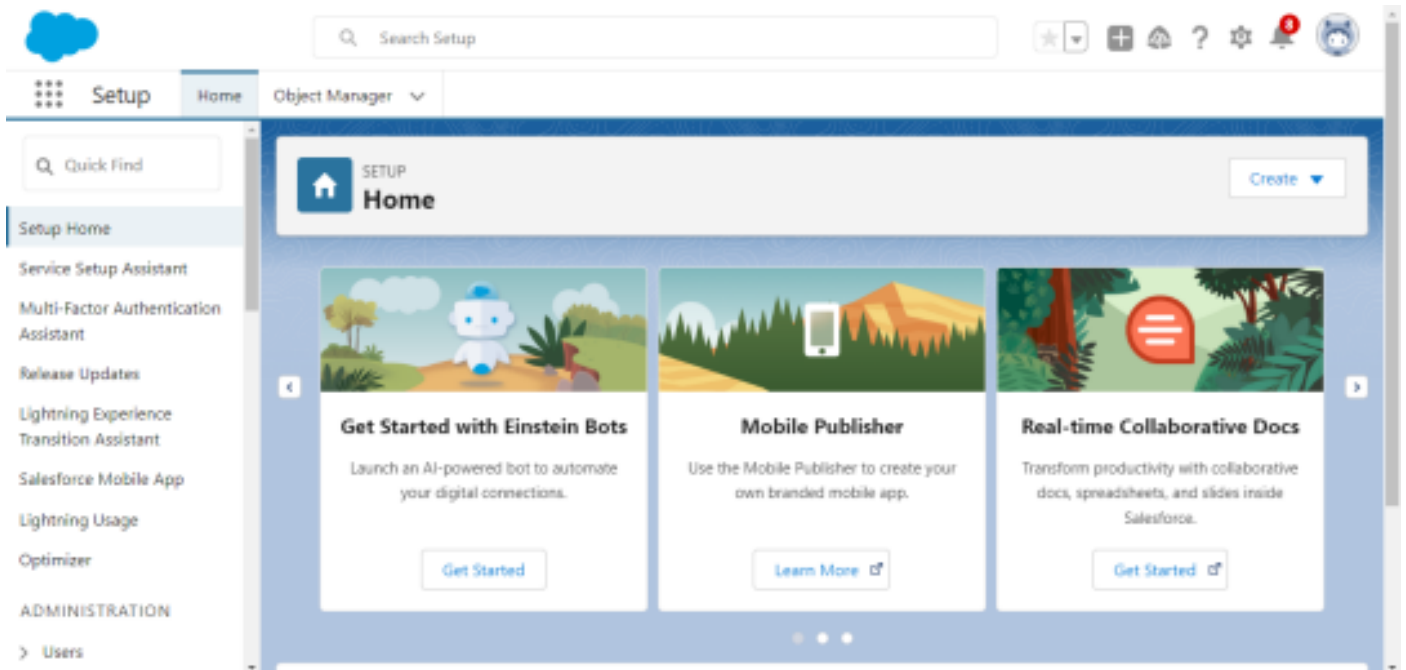
1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins



2. Click on Verify Account

3. Give a password and answer a security question and click on change password

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



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

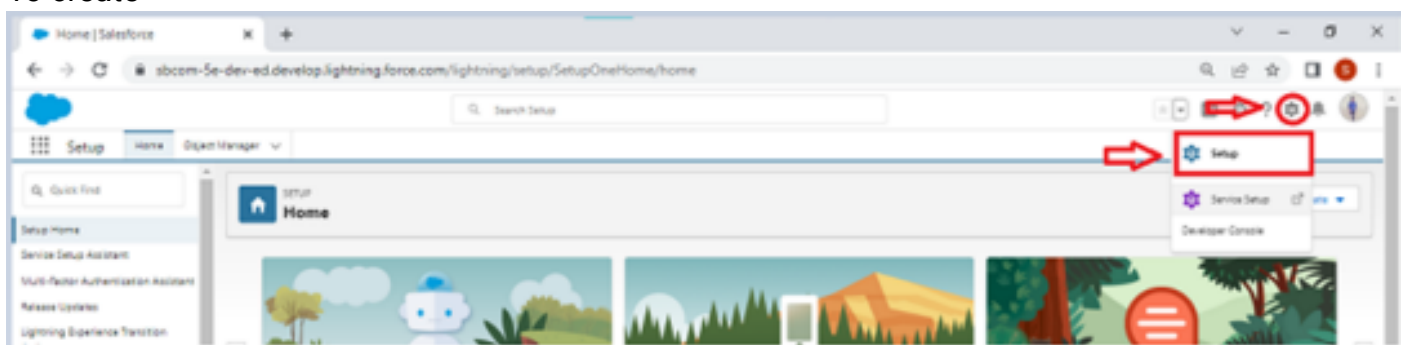
Salesforce objects are of two types:

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.

To Navigate to Setup page:

Click on gear icon > click setup.

To create



To create an object:

1. From the setup page > Click on Object Manager > Click on Create > Click on Custom Object.
2. On Custom object defining page:
3. Enter the label name, plural label name, click on Allow reports, Allow search.
4. Click on Save.

The screenshot shows the Salesforce Setup interface. At the top, the 'Object Manager' tab is selected. Below it, the 'Create' button is highlighted, leading to the 'Custom Object' option. The 'New Custom Object' wizard is open, showing the 'Custom Object Definition Edit' screen. The 'Custom Object Information' section includes fields for 'Label', 'Plural Label', 'Record Name', and 'Record Name Label and Format'. The 'Optional Features' section has checkboxes for 'Allow Reports', 'Allow Activities', 'Track Field History', 'Allow in Chatter Groups', and 'Enable Learning'. The 'Object Classification' section has checkboxes for 'Allow Streaming', 'Allow Bulk API Access', and 'Allow Streaming API Access'. The 'Deployment Status' section has radio buttons for 'In Development' and 'Deployed'. The 'Search Status' section has a checkbox for 'Allow Search'. The 'Object Creation Options' section has checkboxes for 'Add Notes and Attachments related list to default page layout' and 'Launch New Custom Tab Wizard after saving this custom object'. At the bottom, the 'Save', 'Save & New', and 'Cancel' buttons are visible.

Create Customer DetailsObject

To create an object:

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

3. Allow search >> Save

Create Appointment Object

To create an object:

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

Create Service records Object

To create an object:

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

Create Billing details and feedback Object

To create an object:

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

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.

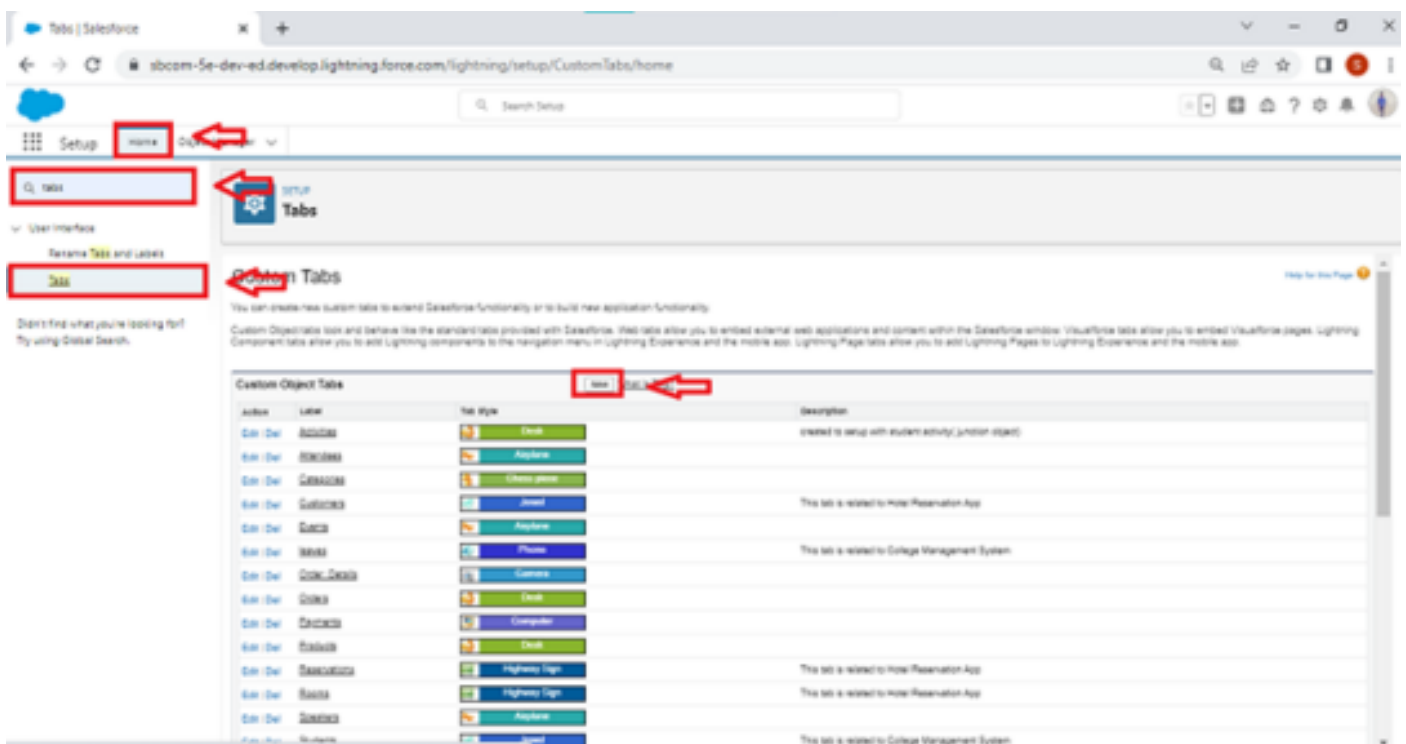
Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window. Web tabs make it easier for your users to quickly access content and applications they frequently use without leaving the salesforce.com application.

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.

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

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 customise the tabs for your apps.

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.



New Custom Object Tab

Help for this Page

Step 1: Enter the Details

Step 1 of 3

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

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

Object:

Tab Style:

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

Splash Page Custom Link:

Enter a short description.

Description:

Next Cancel

Tab Style Selector

Create your own style

Hide styles which are used on other tabs

 Airplane	 Alarm clock	 Apple	 Balls
 Bank[1]	 Bell	 Big top	 Boat[1]
 Books	 Bottle	 Box	 Bridge
 Building	 Building Block	 Caduceus	 Camera
 Can	 Car	 Castle	 CD/DVD
 Cell phone	 Chalkboard	 Chess piece	 Chip
 Circle	 Compass	 Computer	 Credit card
 CRT TV	 Cup	 Desk[1]	 Diamond
 Dice	 Factory	 Fan	 Flag
 Form	 Gears	 Globe	 Guitar
 Hammer	 Hands	 Handsaw	 Headset
 Heart[1]	 Helicopter	 Hexagon	 Highway Sign
 Hot Air Balloon	 Insect	 IP Phone	 Jewel
 Keys	 Laptop	 Leaf	 Lightning

Save

Cancel

Step 3: Add to Custom Apps Step 3 of 3

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	<input type="checkbox"/> Include Tab
Platform (standard__Platform)	<input type="checkbox"/>
Sales (standard__Sales)	<input type="checkbox"/>
Service (standard__Service)	<input type="checkbox"/>
Marketing (standard__Marketing)	<input type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>
Analytics Studio (standard__Insights)	<input type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input type="checkbox"/>
Service Console (standard__LightningService)	<input type="checkbox"/>
Sales (standard__LightningSales)	<input type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input type="checkbox"/>
Queue Management (standard__QueueManagement)	<input type="checkbox"/>
Bolt Solutions (standard__LightningBolt)	<input type="checkbox"/>
Data Manager (standard__DataManager)	<input type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>

☒ Append tab to users' existing personal customizations

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 lightning app page:

1. Go to setup page >> search "app manager" in quick find >> select "app manager">> click on New lightning App.

App Manager | Salesforce

sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenu/home

Search Setup

Setup Home Object Manager

app manager

Lightning Experience App Manager

New Lightning App New Connected App

Clone App (Beta)

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you've read all legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the [Winter 23 release notes](#).

Enable App Cloning ☐

28 items • Sorted by App Name • Filtered by All app namespaces • Tablet Type

	App Name	Developer Name	Description	Last Modified	App Type	WL
1	All Tabs	AllTabs		06/10/2022, 10:13 am	Classic	
2	Analytics Studio	Insights	Build CRM Analytics dashboards and apps	06/10/2022, 10:13 am	Classic	✓
3	App Launcher	AppLauncher	App Launcher tabs	06/10/2022, 10:13 am	Classic	✓
4	Bot Solutions	LightningBot	Discover and manage business solutions designed for your industry	06/10/2022, 10:18 am	Lightning	✓
5	Chatter Desktop	ChatterDesktop	Chatter Desktop is an Adobe Ariba-based desktop application that lets Chatter users stay connected...	06/10/2022, 4:04 pm	Connected (Managed)	✓
6	Chatter Mobile for BlackBerry	ChatterForBlackBerry	The Salesforce.com Chatter Mobile app lets you access Chatter data on the go. Use it to view feed...	06/10/2022, 4:05 pm	Connected (Managed)	✓
7	Storage Management System	ttstest	demo app	06/10/2022, 4:18 pm	Lightning	✓
8	Community	Community	Salesforce CRM Communities	06/10/2022, 10:13 am	Classic	✓
9	Content	Content	Salesforce CRM Content	06/10/2022, 10:13 am	Classic	✓
10	Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage records.	06/10/2022, 10:13 am	Lightning	✓

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.

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name [?]

Name your app...

* Developer Name [?]

Enter a developer name...

Description [?]

Enter a description...

App Branding

Image [?]

Upload

Primary Color Hex Value

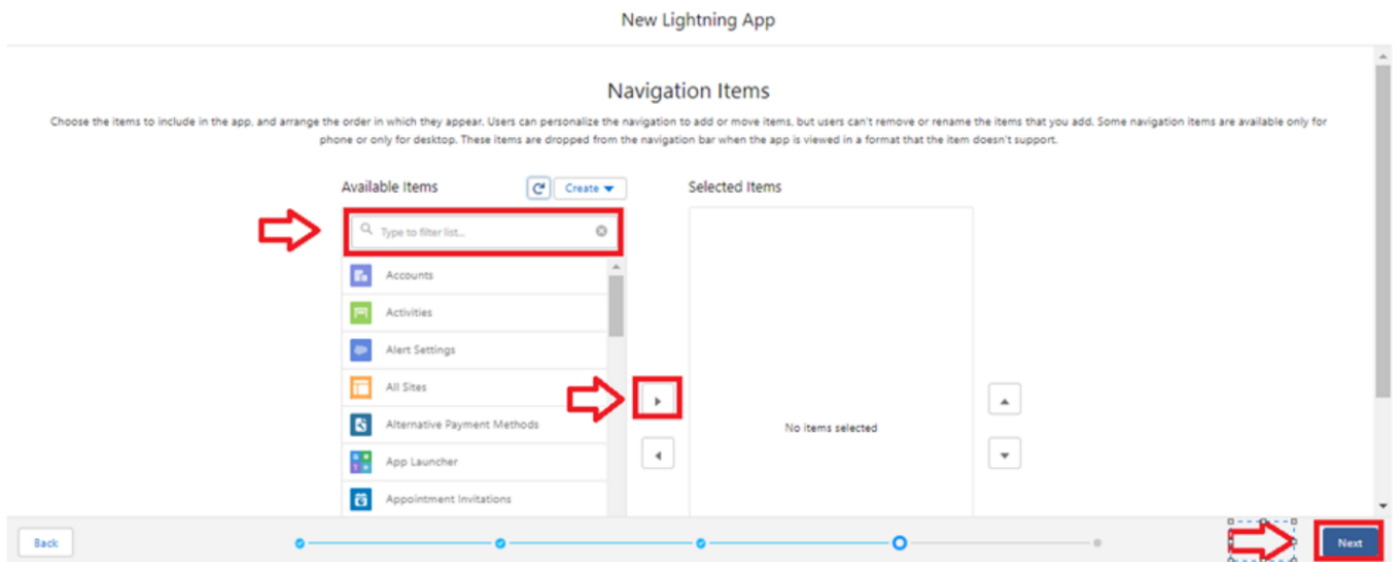
#001002

Org Theme Options

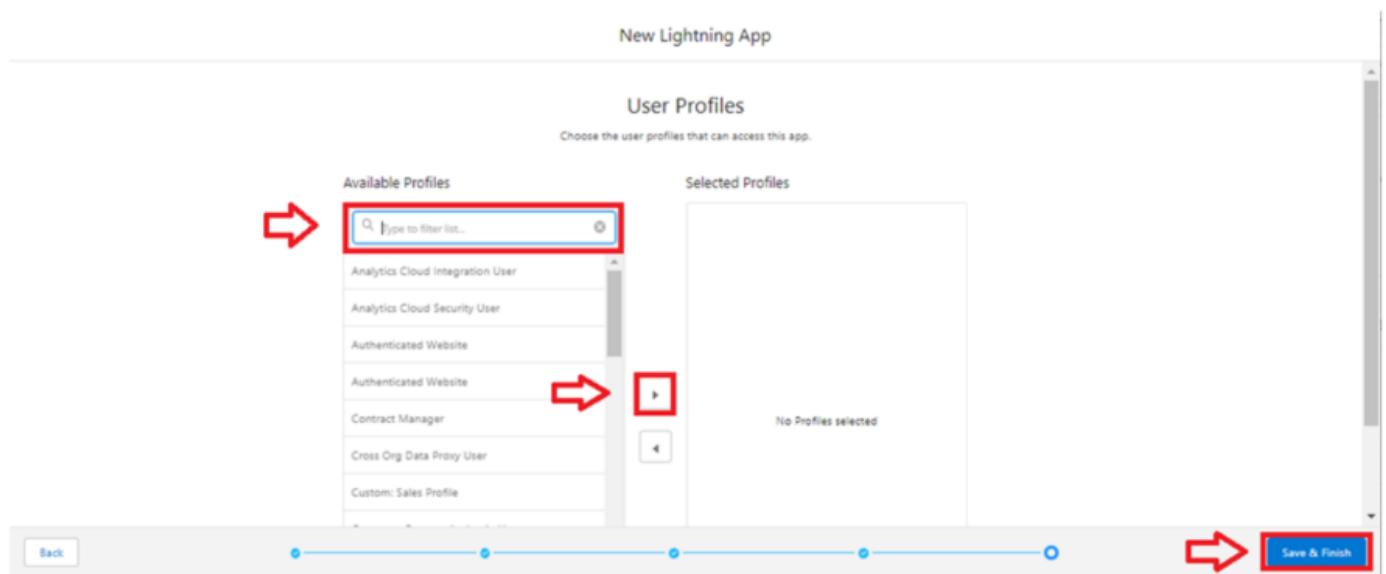
☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

Next



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



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

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the

application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

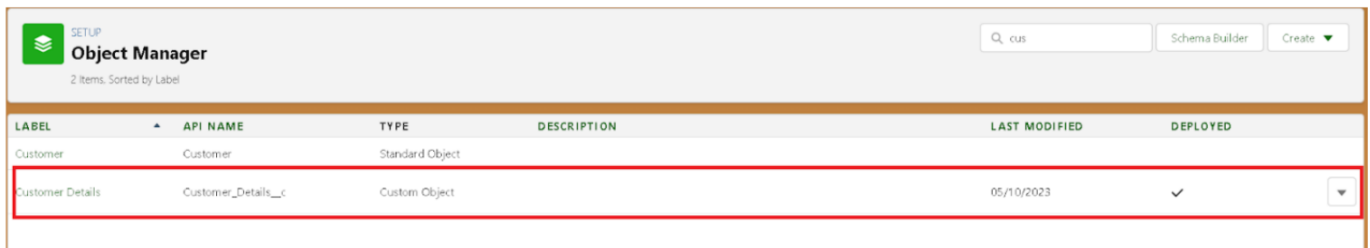
- Created By
- Owner
- Last Modified
- Field Made During object Creation

Custom Fields:

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organiser or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

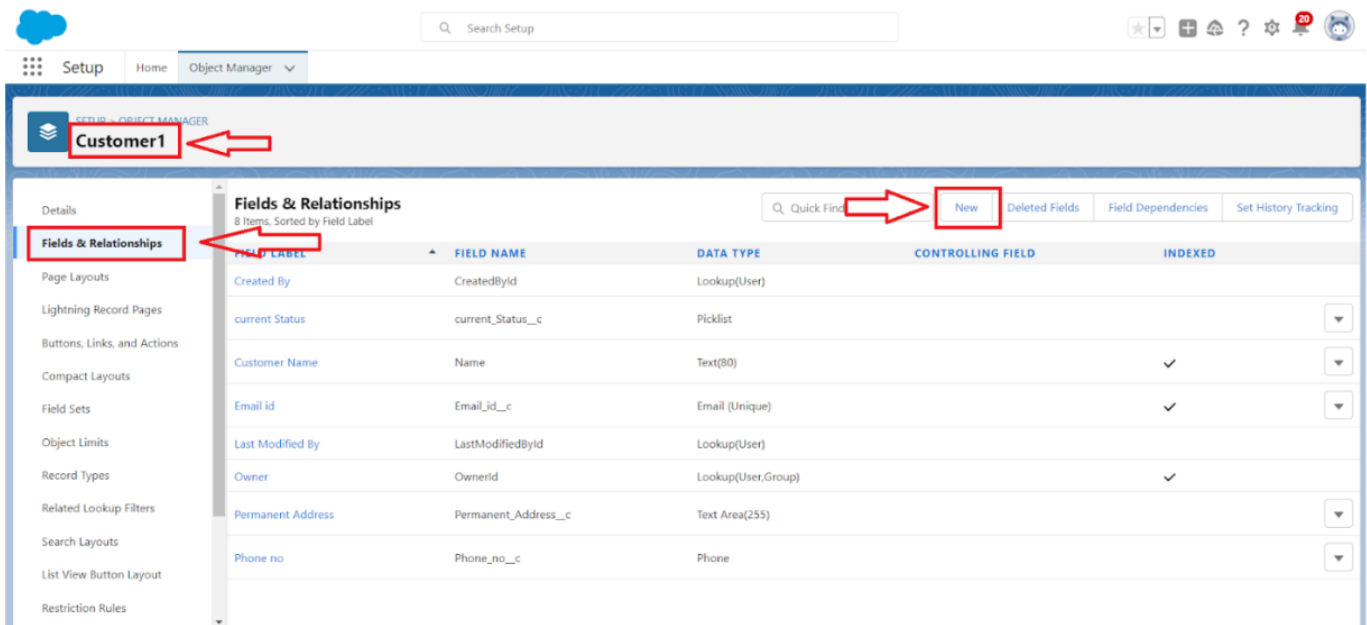
Creation of fields for the Customer Details object

1. To create fields in an object:
2. Go to setup >> click on Object Manager >> type object name(Customer Details) in search bar >> click on the object



LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Customer	Customer	Standard Object			
Customer Details	Customer_Details__c	Custom Object		05/10/2023	✓

3. Now click on “Fields & Relationships” >> New

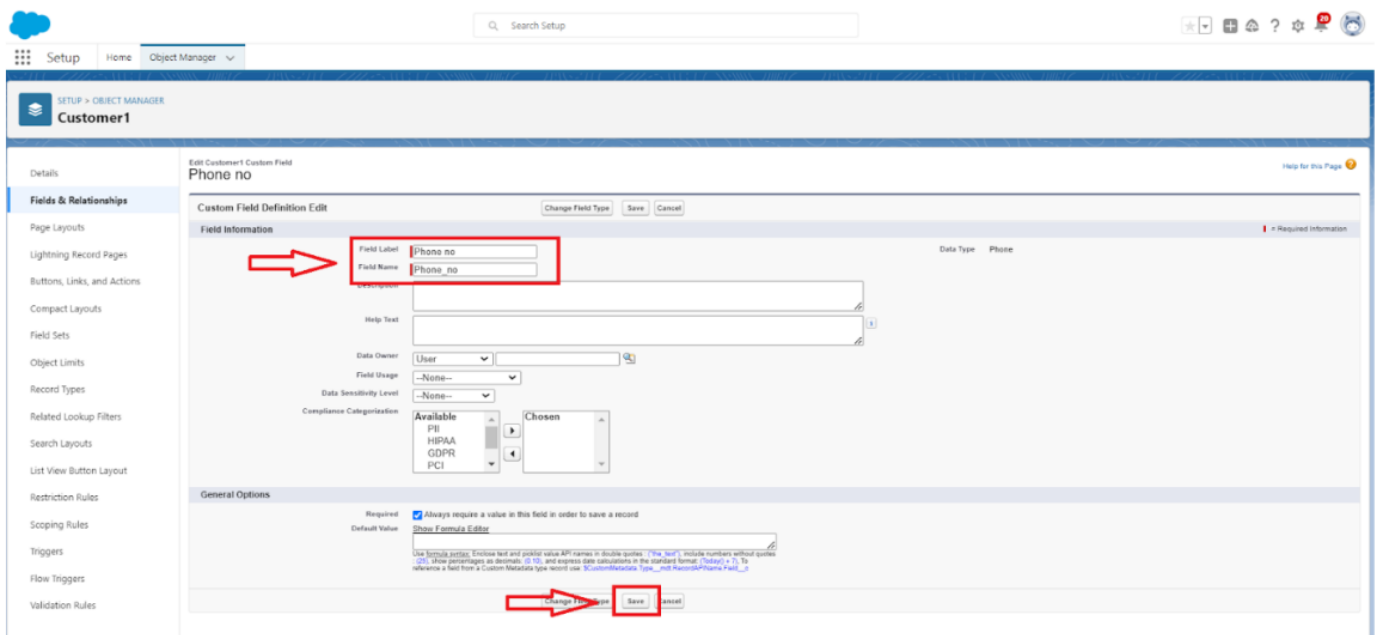
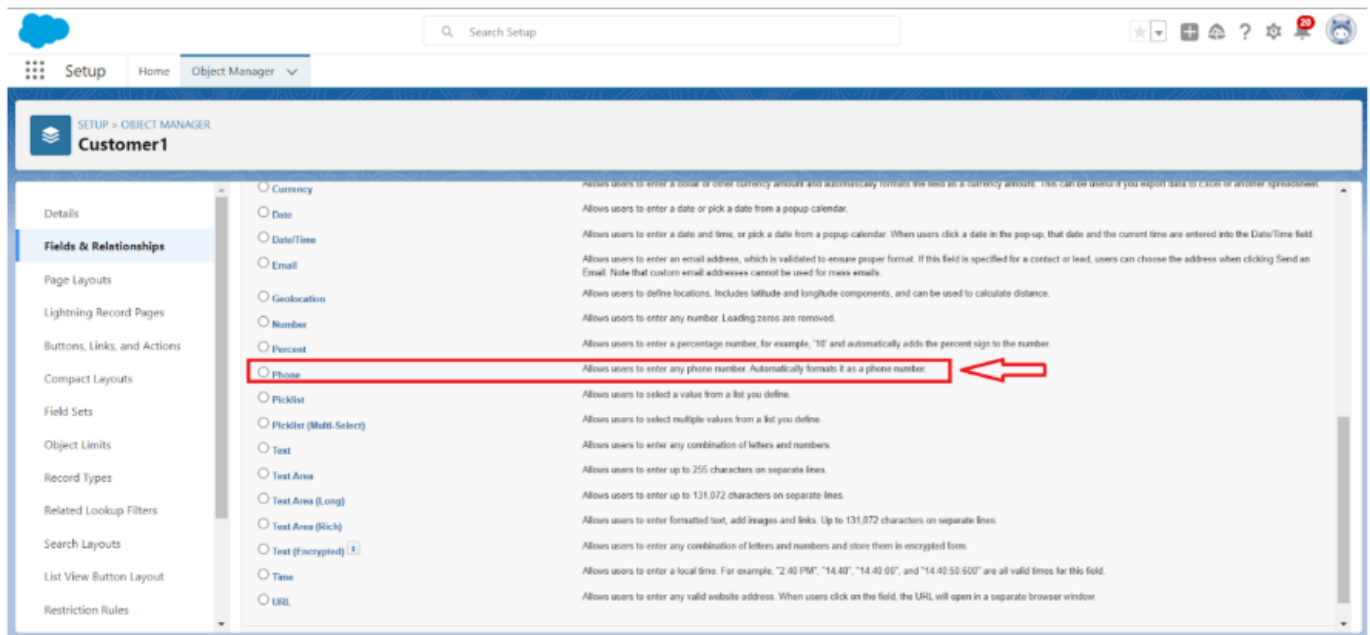


The screenshot shows the Salesforce Setup interface. The 'Object Manager' tab is selected, and the 'Customer1' object is chosen. The 'Fields & Relationships' section is active, showing a list of fields. The 'New' button is highlighted with a red box, and the 'Fields & Relationships' tab is also highlighted with a red box.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
current Status	current_Status__c	Picklist		
Customer Name	Name	Text(80)		✓
Email Id	Email_id__c	Email (Unique)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Permanent Address	Permanent_Address__c	Text Area(255)		
Phone no	Phone_no__c	Phone		

3. Select Data Type as a “Phone”
4. Click on next.
5. Fill the Above as following:
 - Field Label: Phone number
 - Field Name : gets auto generated
 - Click on Next >> Next >> Save and new.

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



To create another fields in an object:

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

Creation of Lookup Fields

Creation of Lookup Field on Appointment Object :

1. Go to setup >> click on Object Manager >> type object name(Appointment) in the search bar >> click on the object.
2. Now click on "Fields& Relationships" >>New
3. Select "Look-up relationship"as data type and click Next.
4. Select the related object " CustomerDetails" and click next
5. Next >> Next >>Save

Note: Make sure you complete Activity-4 Before continuing.

Setup Object Manager

7 Items, Sorted by Label

Label	API Name	Type	Description	Last Modified	Deployed
Appointment	Appointment__c	Custom Object		24/08/2023	✓
Appointment Category	AppointmentCategory	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			

Setup > OBJECT MANAGER Appointment

Details Fields & Relationships 14 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

Field Label	Field Name	Data Type	Controlling Field	Indexed
Appointment Date	Appointment_Date__c	Date		
Appointment Name	Name	Auto Number		✓

Specify the type of information that the custom field will contain.

Data Type

Select one of the data types below.

☐ None Selected

☐ Auto Number

☐ Formula

☐ Roll-Up Summary

☒ Lookup Relationship

☐ Master-Detail Relationship

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.

Creation of Lookup Field on Service records Object :

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

Lookup Options

Related To Appointment

Child Relationship Name Service_records

Related List Label Service records

Required ☒ Always require a value in this field in order to save a record

What to do if the lookup record is deleted?

☐ Clear the value of this field. You can't choose this option if you make this field required.

☒ Don't allow deletion of the lookup record that's part of a lookup relationship.

6. Scroll down for Lookup Filter and click on Show filter settings.
7. Now add the filter criteria.
8. Field : Appointment: Appointment Date >> Operator : less than >> select field >> Appointment:

Created Date

9. Filter type should be Required

Lookup Filter

Optionally, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

[Hide Filter Settings](#)

Filter Criteria [Insert Suggested Criteria](#)

Field	Operator	Value / Field
Appointment: Appointment Date	less than	Field Appointment: Created Date
Begin typing to search for a field	--None--	Value

[Add filter logic...](#)

Filter Type

☒ **Required.** The user-entered value must match filter criteria.
If it doesn't, display this error message on save:
Value does not exist or does not match filter criteria.
[Reset to default message](#)

☐ **Optional.** The user can remove the filter or enter values that don't match criteria.

Lookup Window Text [Add this informational message to the lookup window](#)

Active ☒ **Enable this filter.**

[Change Field Type](#) [Save](#) [Cancel](#)

10. Error Message : Value does not match the criteria.

11. Enable the filter by click on Active.

12. Next >> Next >> Save.

Creation of Lookup Field on Billing details and feedback Object :

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

Creation of Checkbox Fields

Creation of Checkbox Field on Appointment Object :

1. Go to setup >> click on Object Manager >> type object name(Appointment) in search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.

Creation of Checkbox Fields

Creation of Checkbox Field on Appointment Object :

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

Creation of Another Checkbox Field on Appointment Object :

1. Repeat the steps form 1 to 3.

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

Creation of Checkbox Field on Service records Object :

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

Creation of date Fields

Creation of Date Field on Appointment Object :

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

Appointment
New Custom Field

Step 2. Enter the details

Field Label: Appointment Date

Field Name: Appointment_Date

Description:

Help Text:

Required: ☒ Always require a value in this field in order to save a record

Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity

Default Value: Show Formula Editor

Previous Next Cancel

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.

Appointment
New Custom Field

Help for this Page ?

Step 3. Establish field-level security Step 3 of 4

Previous Next Cancel

Field Label Service Amounts
Data Type Currency
Field Name Service_Amounts
Description

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field Level Security for Profile	Visible	Read Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Creation of Currency Field on Billing details and feedback Object :

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

Creation of Text Fields

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

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label Vehicle number plate

Please enter the maximum length for a text field below

Length 10

Field Name Vehicle_number_plate

Description

Help Text

Required ☒ Always require a value in this field in order to save a record

Unique ☒ Do not allow duplicate values

☒ Treat "ABC" and "abc" as duplicate values (case insensitive)

☐ Treat "ABC" and "abc" as different values (case sensitive)

External ID ☐ Set this field as the unique record identifier from an external system

Auto add to custom report type ☒ Add this field to existing custom report types that contain this entity

Creation of Text Fields in Billing details and feedback object :

1. Go to setup >> click on Object Manager >> type object name(Billing details and feedback) in

search bar >> click on the object.

2. Now click on "Fields & Relationships" >> New.
3. Select "text" as data type and click Next.
4. Give the Field Label : Rating for service
5. Field Name : is auto populated
6. Length : 1
7. Make field as Required and Unique.
8. Click on next >> next >> save

Creation of Picklist Fields

Creation of Picklist Fields in Service records object :

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

The screenshot shows the 'New Custom Field' setup interface. At the top, it says 'Step 2. Enter the details' and 'Step 2 of 4'. The 'Field Label' is set to 'Service Status'. Under the 'Values' section, the option 'Enter values, with each value separated by a new line' is selected. The text box below contains 'Started' and 'Completed' on separate lines. There are checkboxes for 'Display values alphabetically, not in the order entered', 'Use first value as default value', and 'Restrict picklist to the values defined in the value set' (which is checked). The 'Field Name' is 'Service_Status' and the 'Description' field is empty.

6. Click Next.
7. Next >> Next >> Save.

Creation of Picklist Fields in Billing details and feedback object :

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

Creating Formula Field in Service records Object

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

click on the object.

2. Click on fields & relationship >> click on New.

3. Select Data type as "Formula" and click Next.

4. Give Field Label and Field Name as "service date" and select formula return type as "Date" and click

next.

6. click "Check Syntax" .

7. Click next >> next >> Save.

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

The image shows two screenshots of the Salesforce formula editor interface.

Top Screenshot: Step 2. Choose output type

- Field Label:
- Field Name:
- Formula Return Type: ☒ Date
- Buttons: Previous, Next, Cancel

Bottom Screenshot: Step 3. Enter formula

- Example: `Reminder Date = CloseDate - 7`
- Simple Formula / Advanced Formula tabs
- Formula input: `service dates (Date) = CreatedDate`
- Functions list: ABS, ACOS, ADDMONTHS, AND, ASCII
- Buttons: Previous, Next, Cancel

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.

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is true

Error Message: Please enter valid number

This error message can either appear at the top of the page or below a specific field on the page

Error Location: ☐ Top of Page ☒ Field Vehicle number plate

Save Save & New Cancel

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"))`

Validation Rule Edit

Rule Name: service_status_note

Active: ☒

Description:

Error Condition Formula

Example: Discount_Percent__c > 30% More Examples

If this formula expression is true, display the text defined in the Error Message area

Insert Field Insert Operator

NOT(ISPICKVAL(Service_Status__c , "Completed"))

Check Syntax

Functions: -- All Function Categories --

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

Insert Selected Function

ABS(number)

Returns the absolute value of a number, a number without its sign

Help on this function

Save Save & New Cancel

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is true

Error Message: still it is pending

This error message can either appear at the top of the page or below a specific field on the page

Error Location: ☐ Top of Page ☒ Field Service Status

Save Save & New Cancel

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

2. Click on matching rule >> click on New Rule.

The screenshot shows the 'Setup' page. In the left sidebar, the 'Setup' menu item is highlighted, and the 'Matching Rules' sub-item is also highlighted with a red arrow. In the main content area, the 'Matching Rules' section is visible, and the 'New Rule' button is highlighted with a red arrow.

Matching Rule New Matching Rule

Help for this Page

Step 1: Select object Step 1 of 2

Select the object to which this matching rule applies.

Object: Customer Details

Next Cancel

Next Cancel

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.

Save Cancel

Rule Details ! = Required Information

Object: Customer Details

Rule Name: matching Customer deta

Unique Name: matching_Customer_det

Description:

Matching Criteria

Tell the rule which fields to compare and how.

Field	Matching Method	Match Blank Fields	
Gmail	Exact	<input type="checkbox"/>	AND
Phone Number	Exact	<input type="checkbox"/>	AND
--None--	Exact	<input type="checkbox"/>	AND
--None--	Exact	<input type="checkbox"/>	AND
--None--	Exact	<input type="checkbox"/>	

Add Filter Logic...

Save Cancel

Matching Rule Help for this Page

matching Customer details

Matching Rule Detail

Object: Customer Details

Rule Name: matching Customer details

Unique Name: matching_Customer_details

Description:

Matching Criteria: (Customer Details: Gmail EXACT MatchBlank = FALSE) AND (Customer Details: Phone_Number EXACT MatchBlank = FALSE)

Status: inactive

Created By: project.2, 25/09/2023, 10:15 am

Modified By: project.2, 10/10/2023, 3:32 pm

Edit Delete Clone Activate

To create a Duplicate rule to an Customer details
Object

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

7. After saving the Duplicate Rule, Click on Activate.

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.

Types of profiles in salesforce

1. Standard profiles:

By default salesforce provides below standard profiles.

- Contract Manager
- Read Only
- Marketing User
- Solutions Manager
- Standard User
- System Administrator.

We cannot delete standard ones

Each of these standard ones includes a default set of permissions for all of the standard objects available on the platform.

2. Custom Profiles:

Custom ones defined by us.

They can be deleted if there are no users assigned with that particular one.

Manager Profile

To create a new profile:

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (Manager) >> Save.
2. While still on the profile page, then click Edit.
3. 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.
4. Changing the session times out after should be "8 hours of inactivity".
5. Change the password policies as mentioned:
6. User passwords expire in should be "never expires".
7. Minimum password length should be "8", and click save.

Sales person Profile

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Salesforce Platform User) >> enter profile name (sales person) >> Save.
2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the GA range 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.

Custom Object Permissions						
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Appointments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Billing details and feedback	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Environments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Laptops	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service records	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SessionData	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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:

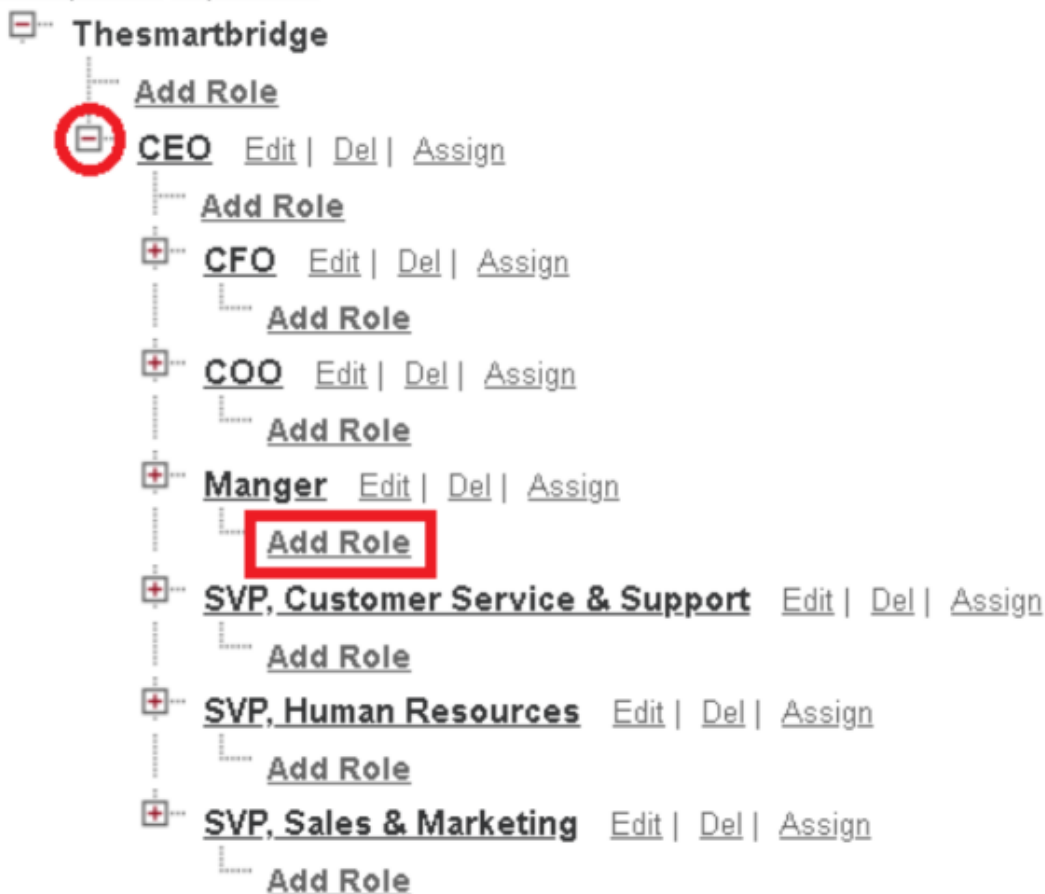
1. Go to quick find >> Search for Roles >> click on set up roles.
2. Click on Expand All and click on add role under whom this role works.

Creating another roles

Creating another two roles under manager

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

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



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
 1. First Name : Niklaus
 2. Last Name : Mikaelson
 3. Alias : Give a Alias Name
 4. Email id : Give your Personal Email id
 5. Username : Username should be in this form: text@text.text
 6. Nick Name : Give a Nickname
 7. Role : Manager
 8. User licence : Salesforce
 9. Profiles : Manager

The screenshot shows the 'New User' form in Salesforce. The 'General Information' section is highlighted with a red box, showing fields for First Name (Niklaus), Last Name (Mikaelson), Alias (nmika), Email, Username (Mikaelson@Niklaus), and Nickname (nik). The 'Required Information' section is also highlighted with a red box, showing fields for Role (Manger), User License (Salesforce), Profile (Manager), and Active (checked). Below these are checkboxes for Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, and WDC User. At the bottom is a dropdown for Data.com User Type set to --None--.

creating another users

1. Repeat the steps and create another user using
 1. Role : sales person
 2. User licence : Salesforce Platform
 3. Profile : sales person
- Note : create atleast 3 users with these permissions.

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.

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.

Sharing Rules:

Sharing rules are used to extend access to records for users who meet specific criteria. They can be used to grant read-only or read-write access to records owned by other users.

Manual Sharing:

Administrators and record owners can manually share specific records with other users or groups.

SETUP
Sharing Settings

Work Plan Template	Private	Private	<input checked="" type="checkbox"/>
Work Step Template	Private	Private	<input checked="" type="checkbox"/>
Work Type	Private	Private	<input checked="" type="checkbox"/>
Work Type Group	Public Read/Write	Private	<input checked="" type="checkbox"/>
Appointment	Public Read/Write	Private	<input checked="" type="checkbox"/>
Billing details and feedback	Public Read/Write	Private	<input checked="" type="checkbox"/>
Customer Details	Public Read/Write	Private	<input checked="" type="checkbox"/>
Environment	Public Read/Write	Private	<input checked="" type="checkbox"/>
Laptop	Public Read/Write	Private	<input checked="" type="checkbox"/>
Service records	Private	Private	<input checked="" type="checkbox"/>
SessionData	Public Read/Write	Private	<input checked="" type="checkbox"/>

User Visibility Settings

Portal User Visibility ☐ Site User Visibility ☐

Other Settings

Standard Report Visibility ☒ Manual User Record Sharing ☐ Manager Groups ☐

Minimize the number of roles created, which improves performance by cutting down processing loads ☒ Grant site users access to related cases ☒ Secure guest user record access ☐ Require permission to view record names in lookup fields ☐

Save **Cancel**

3. Click on save and refresh.
4. Scroll down a bit, Click new on Service records sharing Rules.
5. Give the Label name as " Sharing setting"
6. Rule name is auto populated.
7. In step 3 : Select which records to be shared, members of " Roles " >> " Sales person"
8. In step 4: share with, select " Roles " >> " Manager "
9. In step 5 : Change the access level to " Read / write ".
10. Click on save.

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


New Flow


Core All + Templates


**Screen Flow**
Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and more.

**Record-Triggered Flow**
Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background. 1

**Schedule-Triggered Flow**
Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.

**Platform Event—Triggered Flow**
Launches when a platform event message is received. This autolaunched flow runs in the background.

**Autolaunched Flow (No Trigger)**
Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.

**Record-Triggered Orchestration**
Launches when a record is created or updated. An orchestration lets you create a multi-step, multi-user process.

2

Create

Configure Start

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

*Object

Billing details and feedback

Configure Trigger

*Trigger the Flow When:

- ☐ A record is created
- ☐ A record is updated
- ☒ A record is created or updated ←
- ☐ A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

None

*Optimize the Flow for:

Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

Actions and Related Records 3

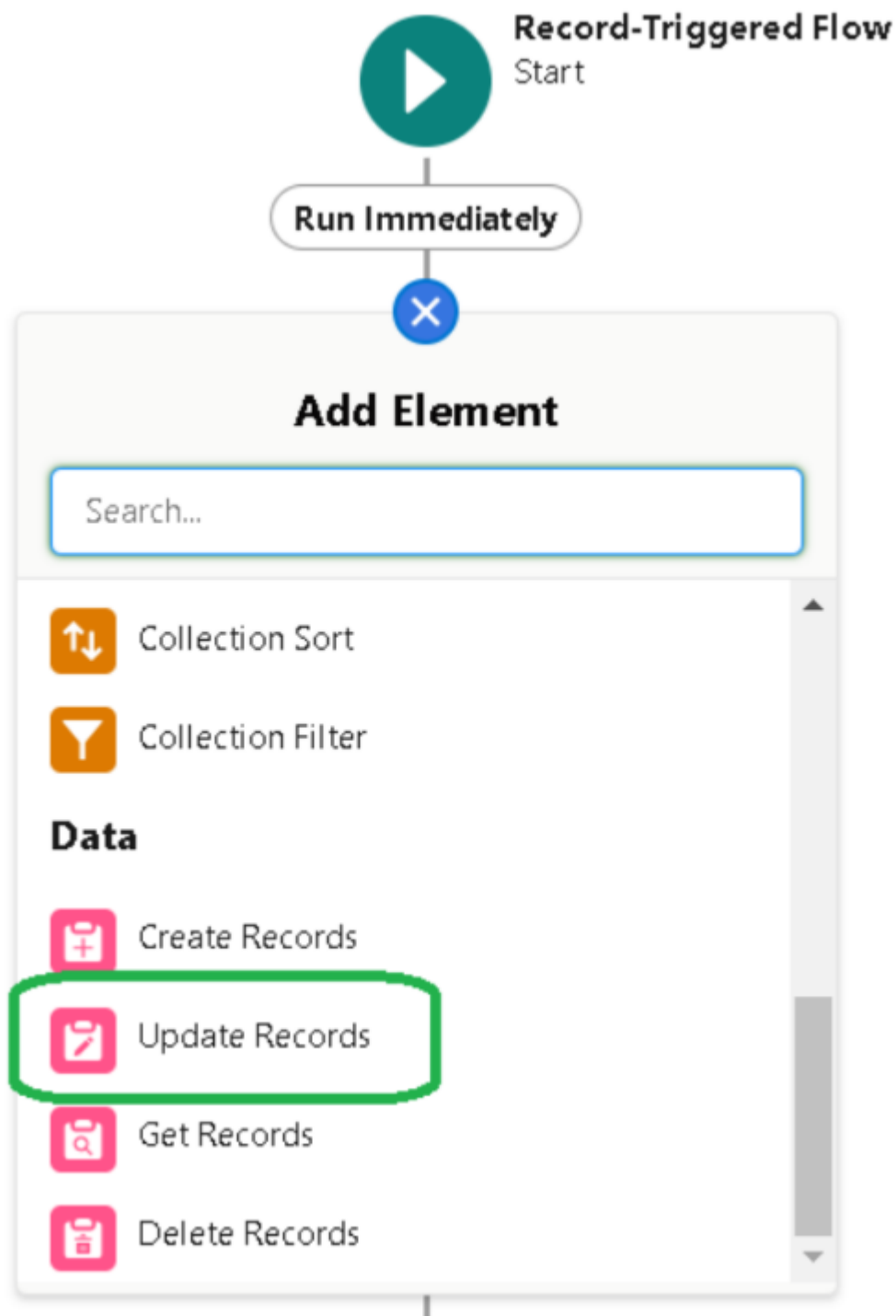
Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database.

☐ Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

4

Cancel

Done



6. Give the Label Name : Amount Update
7. Api name : is auto populated

Edit Update Records

Update Salesforce records using values from the flow.

***Label**

***API Name**

Description

***How to Find Records to Update and Set Their Values**

☒ Use the billing details and feedback record that triggered the flow
☐ Update records related to the billing details and feedback record that triggered the flow
☐ Use the IDs and all field values from a record or record collection
☐ Specify conditions to identify records, and set fields individually

Set Filter Conditions

Condition Requirements to Update Record

All Conditions Are Met (AND) ▼

Cancel
Done

Set Filter Conditions

Condition Requirements to Update Record

All Conditions Are Met (AND) ▼

Field	Operator	Value	
Payment_Status__c	Equals ▼	Completed	✕

+ Add Condition

Set Field Values for the Billing details and feedback Record

Field		Value	
Payment_Paid__c	←	<div style="display: flex; align-items: center;"> \$Record > Service records > Appointment > Service A... ✕ </div>	✕

+ Add Field

Cancel
Done

8. Set a filter condition : All Conditions are met(AND)
9. Field : Payment_Status__c
10. Operator : Equals
11. Value : Completed
12. And Set Field Values for the Billing details and feedback Record

13. Field : Payment_Paid__c
14. Value : {{\$Record.Service_records__r.Appointment__r.Service_Amount__c}}
15. Click On Done.
16. Before creating another Element. Create a New Resource form Toolbox form top left.
17. Click on the New Resource, And select Variable.
18. Select the resource type as text template.
19. Enter the API name as " alert".
20. Change the view as Rich Text ? View to Plain Text.
21. In body field paste the syntax that given below.
 Dear {{\$Record.Service_records__r.Appointment__r.Customer_Name__r.Name}},
 I hope this message finds you well. I wanted to take a moment to express my sincere gratitude for your recent payment for the services provided by our garage management team. Your prompt payment is greatly appreciated, and it helps us continue to provide top-notch services to you and all our valued customers.
 Amount paid : {{\$Record.Payment_Paid__c}}
 Thank you for Coming .

Edit Text Template

***API Name**

alert

Description

***Body** ⓘ

Insert a resource... 🔍 View as Plain Text ▼

Dear {{\$Record.Service_records__r.Appointment__r.Customer_Name__r.Name}},

Cancel Done

22. Now Click on Add Element , select Action.
23. Their action bar will be opened in that search for " send email " and click on it.
24. Give the label name as " Email Alert"
25. API name will be auto populated.
26. Enable the body in set input values for the selected action.
27. Select the text template that created , Body : {!alert}
28. Include recipient address list select the email form the record.
29. RecipientAddressList:
 {{\$Record.Service_records__r.Appointment__r.Customer_Name__r.Gmail__c}}
30. Include subject as " Thank You for Your Payment - Garage Management".
31. Click done.

Record-Triggered Flow
Start

Save as

A New Version A New Flow

*Flow Label
Billing Amount Flow

*Flow API Name
Billing_Amount_Flow

Description

Show Advanced

Cancel Save

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.

There are primarily two types of Apex Triggers:

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

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

Apex handler

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

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

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

```

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;
}
}
}

```



```

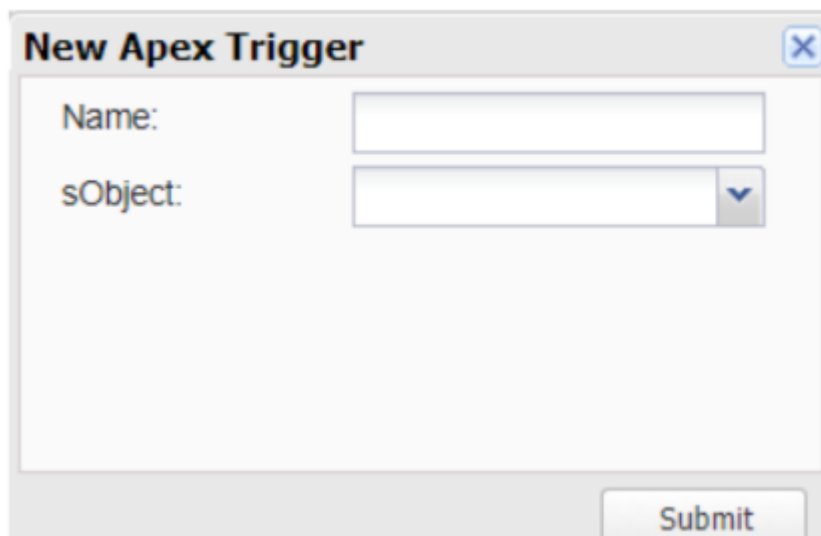
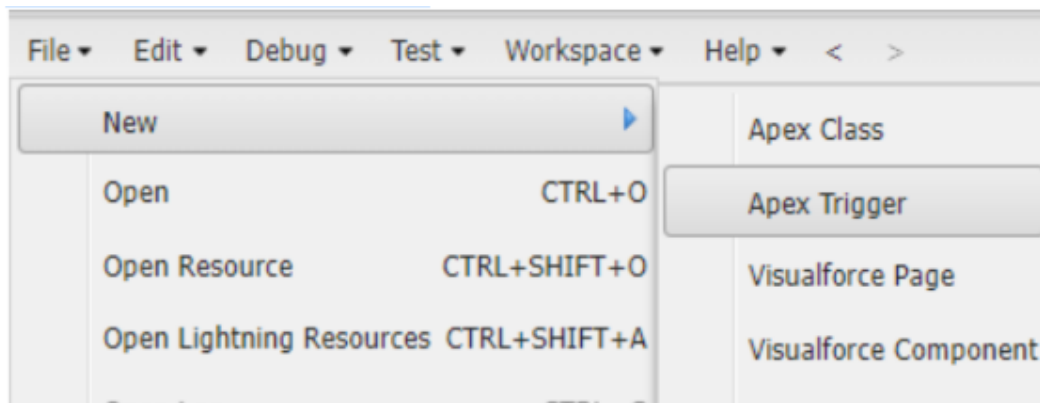
else if(app.Maintenance_service__c == true){
app.Service_Amount__c = 2000;
}
else if(app.Repairs__c == true){
app.Service_Amount__c = 3000;
}
else if(app.Replacement_Parts__c == true){
app.Service_Amount__c = 5000;
}
}
}
}
}

```

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 trigger name and the object to be triggered.
5. Name : AmountDistribution
6. sObject : Appointment__c



Syntax For creating trigger :

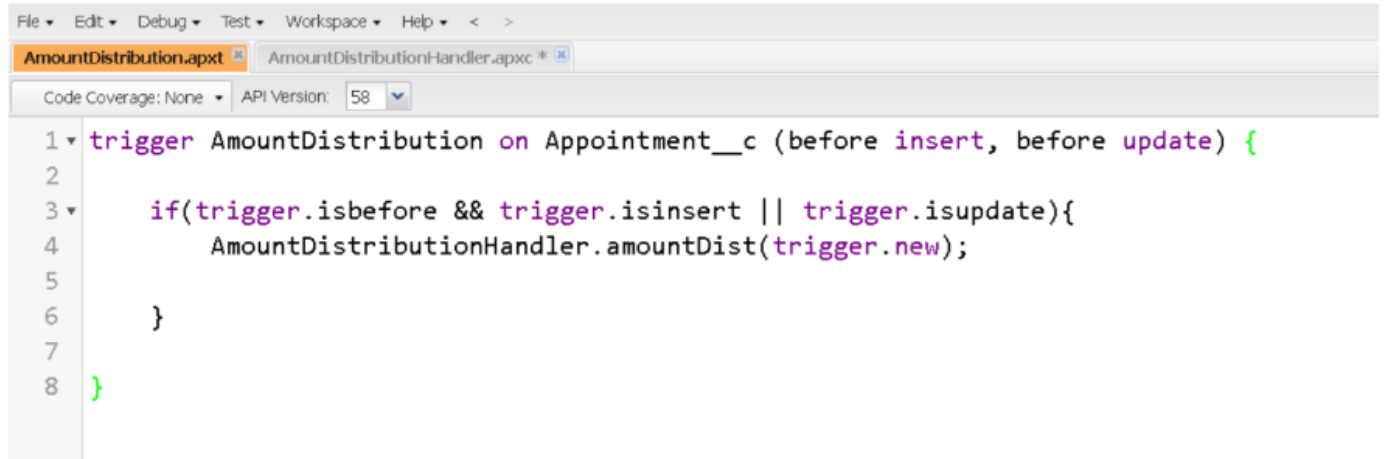
The syntax for creating trigger is :

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

```
{  
}
```

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

1. Handler for the Appointment Object



```
File Edit Debug Test Workspace Help < >  
AmountDistribution.apxt AmountDistributionHandler.apxc *  
Code Coverage: None API Version: 58  
1 trigger AmountDistribution on Appointment__c (before insert, before update) {  
2  
3     if(trigger.isbefore && trigger.isinsert || trigger.isupdate){  
4         AmountDistributionHandler.amountDist(trigger.new);  
5     }  
6 }  
7  
8 }
```

Code:

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

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

tion

On

23, 1

Create folder

* Folder Label

Garage Management Folder

* Folder Unique Name

GarageManagementFolder

Cancel 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

Share folder

These sharing settings apply to all subfolders in this folder.

Share With

Roles 1

Names

Search Roles... 2

Access

View 3

Share 4

Who Can Access

Manger 2

Share 4

Who Can Access

Search Roles... 2

View 3

Share 4

Who Can Access

Search Roles... 2

View 3

Share 4

Who Can Access

Search Roles... 2

View 3

Share 4

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Share 4

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Search Roles... 2

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Who Can Access

Search Roles... 2

View 3

Share 4



SETUP

Report Types

Report Type Focus

! = Required Information

Specify what type of records (rows) will be the focus of reports generated by this report type.

Example: If reporting on "Contacts with Opportunities with Partners," select "Contacts" as the primary object.

Primary Object Customer Details

Identification

Report Type Label Service information

Report Type Name Service_information

Note: Description will be visible to users who create reports.

Description Service information

Store in Category Other Reports

Deployment

A report type with deployed status is available for use in the report wizard. While in development, report types are visible only to authorized administrators and their delegates.

Deployment Status ☐ In Development

☒ Deployed

Next Cancel

New Custom Report Type

Service information

[Help for this Page](#)

Step 2. Define Report Records Set

Step 2 of 2

Previous Save Cancel

This report type will generate reports about Customer Details. You may define which related records from other objects are returned in report results by choosing a relationship to another object.

A Customer Details
Primary Object

B Select Object--

- Select Object--
- Activities
- Appointments
- Duplicate Record Items



at one related "B" record.
related "B" records.

Previous Save Cancel

Step 2. Define Report Records Set

This report type will generate reports about Customer Details. You may define which related records from other objects are

A Customer Details

Primary Object

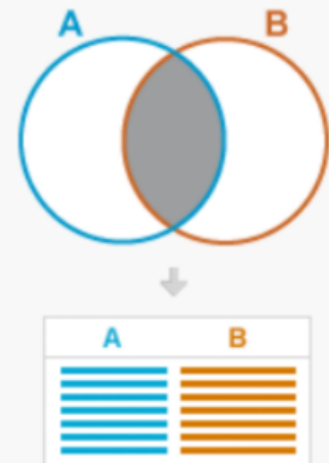
B

Appointments

A to B Relationship:

- ☒ Each "A" record must have at least one related "B" record.
☐ "A" records may or may not have related "B" records.

(Click to relate another object)



SETUP

Report Types

This report type will generate reports about Customer Details. You may define which related records from other objects are returned in report results by choosing a relationship to another object.

A Customer Details

Primary Object

B

Appointments

A to B Relationship:

- ☒ Each "A" record must have at least one related "B" record.
☐ "A" records may or may not have related "B" records.

C

Service records

B to C Relationship:

- ☒ Each "B" record must have at least one related "C" record.
☐ "B" records may or may not have related "C" records.

D

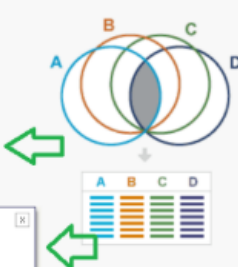
Billing details and feedback

C to D Relationship:

- ☒ Each "C" record must have at least one related "D" record.
☐ "C" records may or may not have related "D" records.

Object Limit Reached

You can associate up to four objects to a custom report type.



Previous

Save

Cancel

Create Report

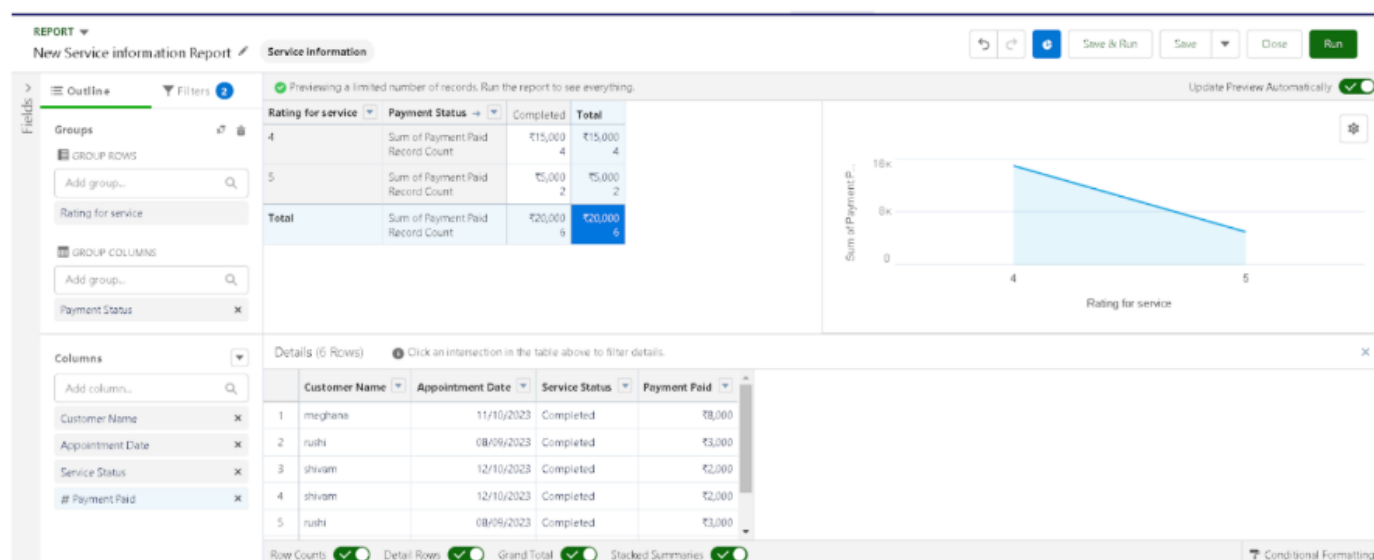
Note : Before creating report, create latest "10" records in every object.

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

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

2. Click New Report.

3. Select the Category as other reports, search for Service Information, select that report, click on it. And click on start report.
4. Their outline pane is opened already, select the fields that mentioned below in column section.
 1. Customer name
 2. Appointment Date
 3. Service Status
 4. Payment paid
5. Remove the unnecessary fields.
6. Select the fields that mentioned below in GROUP ROWS section.
 1. Rating for Service
7. Select the fields that mentioned below in GROUP ROWS section.
 1. Payment Status
8. Click on Add Chart , Select the Line Chart.
9. Click on save, Give the report Name : New Service information Report
10. Report unique Name is auto populated.
11. Select the folder the created and Click on save.



Save Report

* Report Name
New Service information Report

Report Unique Name ⓘ
New_Service_information_Report_oVu

Report Description

Folder
Garage Management Folder

Select Folder

Cancel 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.

Create folder

* Folder Label
Service Rating

* Folder Unique Name
ServiceRating

Cancel Save

6. Follow the same steps, from milestone 15, and activity 2, 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.

New Dashboard

* Name

Customer review

Description

Folder

Service Rating

Select Folder

Cancel Create

Select Report

Reports

Recent

Created by Me

Private Reports

Public Reports

All Reports

Folders

Created by Me

Shared with Me

Select Report

Search Reports and Folders...

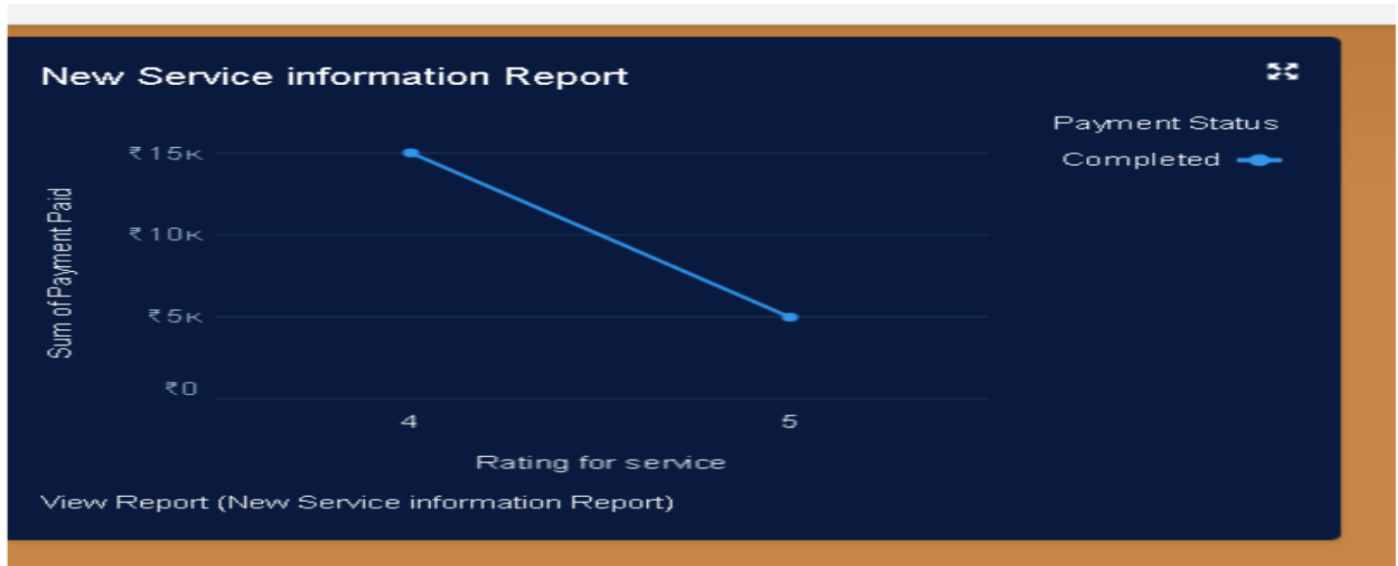
Reports and Folders

New Service Information Report
project 2 - 16-Oct-2023, 3:20 pm - Garage Management Folder

All Bot Sessions Last 30 days
Automated Process - 29-Aug-2023, 10:04 am - Einstein Bot Reports Summer '23

Cancel 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.



8. After that Click on Subscribe on top right.
9. Set the Frequency as " weekly ".
10. Set a day as monday.
11. And Click on save.

Edit Subscription

Schedule dashboard refreshes and subscribe to receive results.

Settings

Frequency
☐ Daily ☒ Weekly ☐ Monthly

Days
☐ Sun ☒ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat

Time
3:00 pm

Recipients

☒ Receive new results by email when dashboard is refreshed. ⓘ

Send email to
Me

[Edit Recipients](#)

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