

Garage Management System

By

Sravya Regalla

regallasravya@gmail.com

Project Abstract

The Garage Management System (GMS) is a comprehensive solution designed to streamline and automate the daily operations of garages, repair shops, and automotive service centers using Salesforce. Built on Salesforce's flexible platform, the GMS leverages Sales Cloud, Service Cloud, and custom applications to manage client interactions, track vehicle service history, handle inventory, and process billing efficiently.

The project began with an in-depth analysis of the existing processes in typical garage operations, identifying key pain points such as inefficient service scheduling, fragmented customer communication, and manual data entry errors. To address these challenges, the GMS was designed to centralize all essential operations on a single platform, allowing service centers to manage their day-to-day activities more effectively.

Key features of the system include:

1. **Customer Relationship Management (CRM):** The GMS provides a 360-degree view of customer interactions, allowing for personalized communication, targeted marketing, and improved customer retention. Customers can schedule appointments, track the status of their vehicle repairs, and receive updates in real-time.
2. **Service Scheduling and Management:** The system offers an intuitive interface for booking and managing service appointments. It ensures optimal resource allocation by matching available mechanics with service requests, reducing wait times and maximizing productivity.
3. **Invoicing and Payments:** The system automates the generation of invoices based on completed services and parts used, integrating with various payment gateways for smooth and secure transactions.
4. **Reporting and Analytics:** Advanced reporting tools provide insights into key performance indicators (KPIs), such as service turnaround time, customer satisfaction, and revenue trends. These analytics empower garage managers to make data-driven decisions to continuously improve operations.

The implementation of the Salesforce Garage Management System has resulted in a significant reduction in manual tasks, increased operational efficiency, and enhanced customer satisfaction. The system not only streamlines day-to-day operations but also provides a foundation for future growth, with the ability to incorporate additional features and integrations as business needs evolve.

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Introduction

The automotive industry is rapidly evolving, with customers demanding faster, more reliable, and personalized service experiences. In this competitive landscape, service centers must adopt innovative solutions to manage their operations efficiently while maintaining high standards of customer satisfaction. The Salesforce Garage Management System (GMS) project was conceived to address these needs by providing a comprehensive, cloud-based solution that streamlines the operations of automotive service centers.

Project Background

Traditional garage management systems often rely on disparate tools and manual processes, leading to inefficiencies, errors, and a lack of transparency. Service centers frequently face challenges such as miscommunication with customers, delays in service due to inadequate scheduling, and inventory shortages that can disrupt repair work. These issues not only reduce operational efficiency but also negatively impact customer satisfaction and loyalty.

Recognizing these challenges, our team embarked on the development of a Salesforce-based Garage Management System. The primary objective was to create an integrated platform that could centralize all critical aspects of garage management, from customer relationship management (CRM) and service scheduling to inventory control and invoicing. Salesforce was chosen as the platform due to its robust customization capabilities, scalability, and ability to deliver real-time analytics, making it an ideal choice for modern service centers.

Project Objectives

The Salesforce GMS was designed with several key objectives in mind:

Objectives:

1. **Enhanced Customer Management:** Store and retrieve detailed customer profiles, service history, and vehicle information, improving customer engagement and personalized service.
2. **Service Scheduling:** Schedule and monitor repair appointments, ensuring better time management and resource allocation.
3. **Inventory Management:** Track spare parts, tools, and other resources to avoid stockouts and reduce inventory costs.
4. **Billing & Invoicing:** Automate the generation of invoices, handle multiple payment methods, and keep a record of financial transactions, minimizing errors and ensuring prompt payment.

Conclusion

The Garage Management System on Salesforce offers an innovative, cloud-based solution that transforms and optimizes garage operations. By centralizing customer management, service scheduling, inventory tracking, and billing within the Salesforce ecosystem, this system improves operational efficiency and enhances customer satisfaction. The integration of real-time analytics and reporting provides valuable insights, enabling managers to make data-driven decisions that support business growth.

With its powerful automation, user-friendly interface, and flexible scalability, the Garage Management System is positioned to be a vital tool for automotive service centers, allowing them to deliver high-quality, personalized service. This project underscores the potential of Salesforce in automating complex workflows, reducing manual errors, and ultimately paving the way for a more streamlined, customer-focused garage experience.

Task 1 (Object Creation)

1. Customer Details Object:

Purpose: This object stores all relevant information about customers, including their personal details, contact information, and vehicle details. It serves as the central repository for managing customer interactions and maintaining a comprehensive service history.

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 >> Customer Details
3. Plural label name >> Customer Details
4. Enter Record Name Label and Format.
 - Record Name >> Customer Name
 - Data Type >> Text
5. Click on Allow reports and Track Field History,
6. Allow search >> Save.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for 'Customer Details | Salesforce' and 'Download file | iLovePDF'. Below the navigation is a toolbar with icons for search, refresh, and various setup functions. The main area has a blue header bar with the title 'Customer Details'. On the left, there's a sidebar with a 'Details' section containing links like 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', etc. The main content area is titled 'Details' and contains sections for 'Description', 'API Name' (set to 'Customer_Details__c'), 'Custom' (selected), 'Singular Label' (set to 'Customer Details'), 'Plural Label' (set to 'Customer Details'), and 'Enable Reports' (checked). There are also sections for 'Track Activities', 'Track Field History' (checked), 'Deployment Status' (set to 'Deployed'), and 'Help Settings'. At the bottom right of the main content area are 'Edit' and 'Delete' buttons.

2. Appointment Object:

Purpose: This object is designed to manage and track service appointments. It allows service centers to schedule, update, and monitor appointments efficiently, ensuring that the right resources are allocated at the right time.

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.

The screenshot shows the Salesforce Setup interface for creating a new object named 'Appointment'. The left sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main 'Details' tab is selected, showing fields for API Name (Appointment_c), Singular Label (Appointment), and Plural Label (Appointments). On the right, checkboxes for enabling Reports, Activities, and Track Field History are checked. Deployment status is set to 'Deployed' and Help Settings point to the standard help window. The top navigation bar shows the current page as 'Appointment | Salesforce'.

3. Service Records Object:

Purpose: The Service Records object keeps a detailed account of all services performed on a vehicle. It logs each service activity, parts used, and any additional notes, creating a complete service history for each vehicle.

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 record
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.

The screenshot shows the Salesforce Setup interface under the Object Manager tab. A new object named 'Service records' is being created. The 'Details' section includes fields for API Name (set to 'Service_records_c'), Singular Label ('Service records'), and Plural Label ('Service records'). Under 'Custom' settings, 'Enable Reports' and 'Track Activities' are checked. Under 'Track Field History', 'Deployment Status' is set to 'Deployed'. The left sidebar lists various configuration options like Fields & Relationships, Page Layouts, and Lightning Record Pages.

4. Billing Details and Feedback Object:

Purpose: This object manages billing and customer feedback. It captures all financial transactions related to services, including invoices and payments, and also collects customer feedback to assess satisfaction and identify areas for improvement.

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 feedbacks
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.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. A new object named 'Billing details and feedback' is being created. The left sidebar lists various configuration options like Fields & Relationships, Page Layouts, and Record Types. The main 'Details' tab is active, showing the following configuration:

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

Buttons at the top right include 'Edit' and 'Delete'.

Task 2 (Tabs Creation)

Creating A Custom Tab

1. 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.

2. 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 screenshot shows the Salesforce Setup interface with the 'Custom Tabs' page open. The page title is 'Custom Tabs' and it includes a brief description: 'You can create new custom tabs to extend Salesforce functionality or to build new application functionality.' Below this is a table titled 'Custom Object Tabs' with the following data:

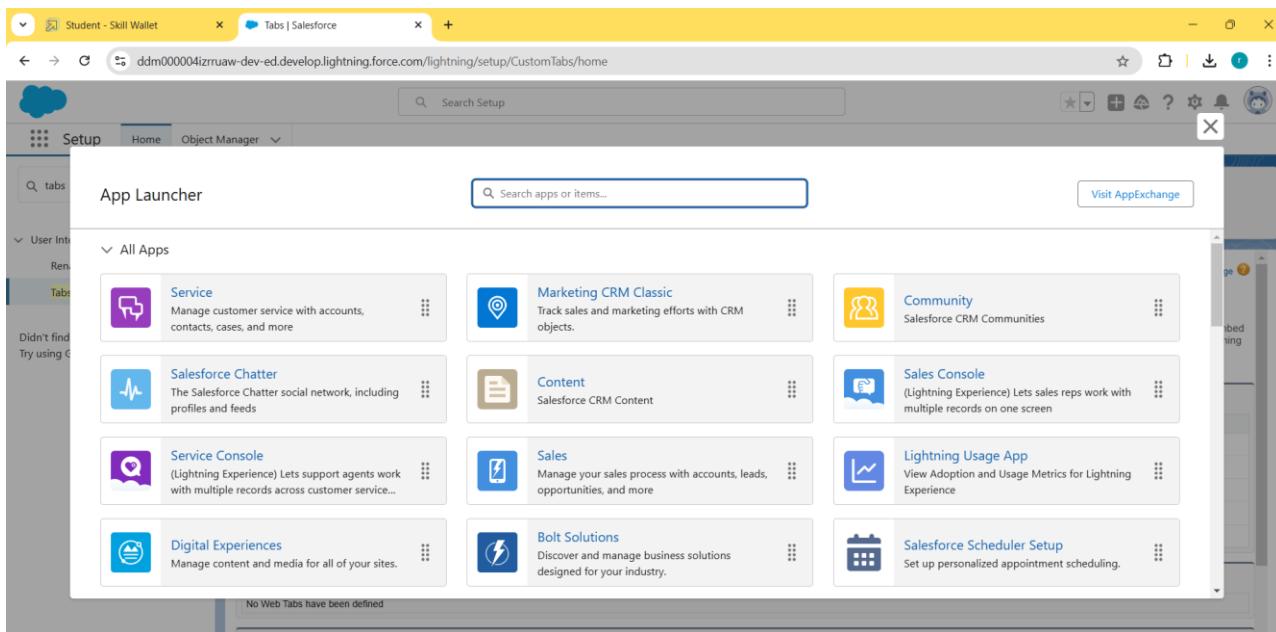
Action	Label	Tab Style	Description
Edit Del	Appointments	Hexagon	
Edit Del	Billing details and feedback	Pencil	
Edit Del	Customer Details	Heart	
Edit Del	Research Proposal	Square	
Edit Del	Service records	Books	

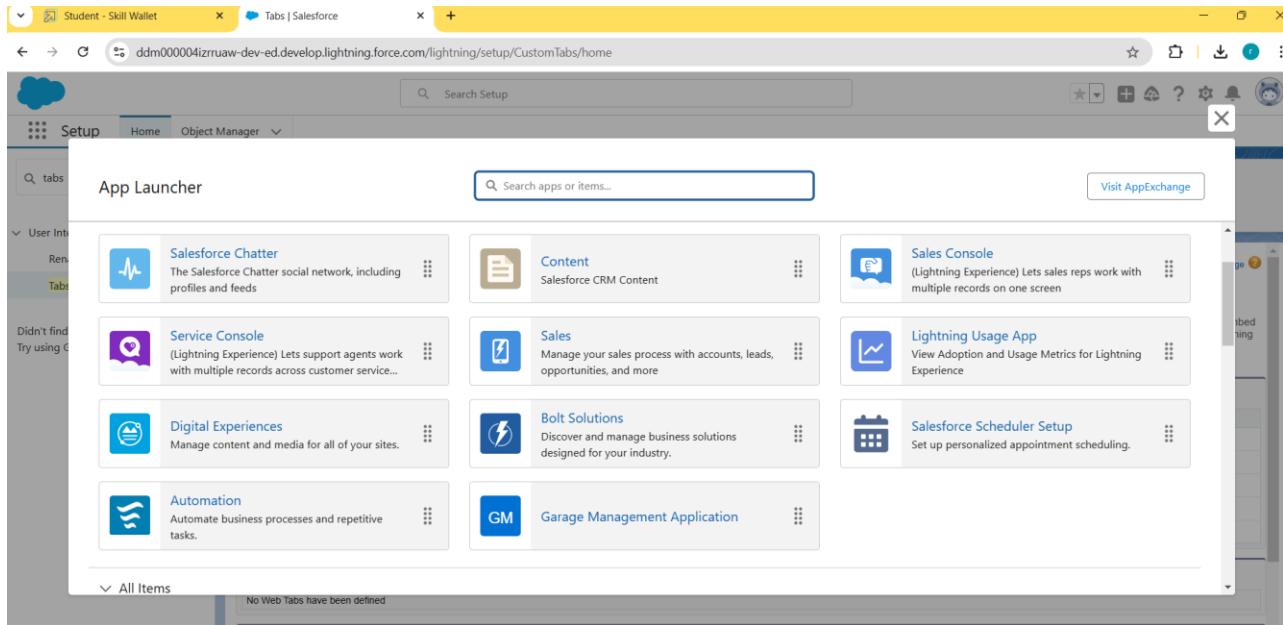
Below this table are sections for 'Web Tabs' (No Web Tabs have been defined) and 'Visualforce Tabs' (No Visualforce Tabs have been defined).

Task 3 (The Lightning App Creation)

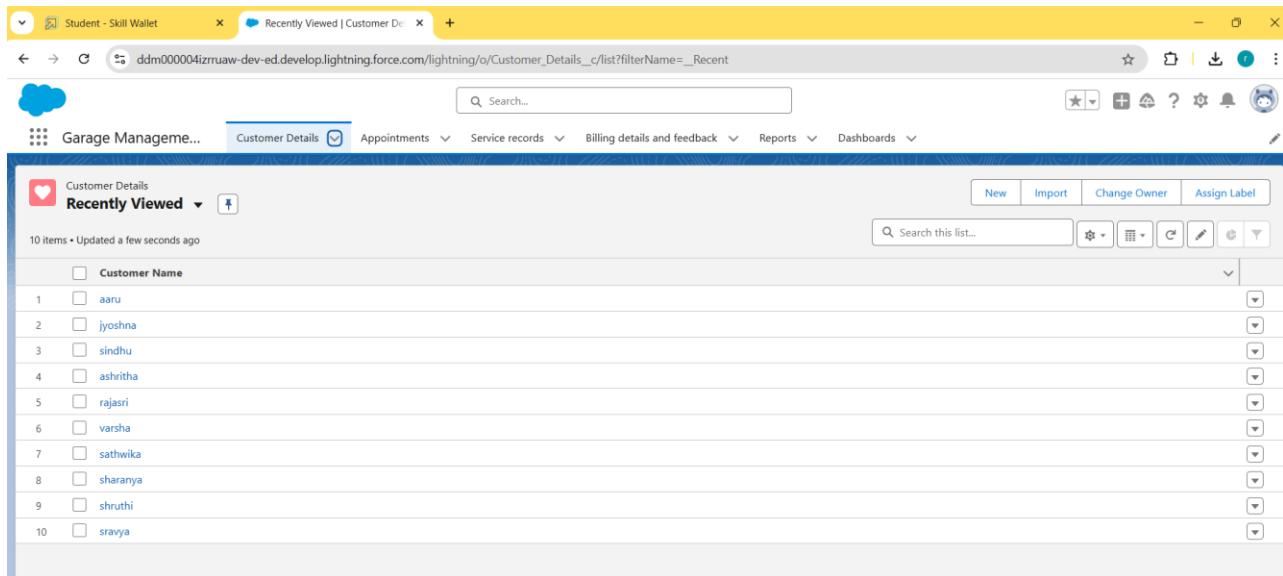
Create A Lightning App

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. To Add Navigation Items:
3. 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.
4. To Add User Profiles: Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.





5. Open Garage Management System Application.



Task 4 (Fields Creation)

Creation Of Fields For The Customer Details Object

1. To create fields in an Customer object:

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

2. To create another fields in an object:

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

Creation Of Lookup Fields

1. Creation of Lookup Field on Appointment Object :

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

2. Creation of Lookup Field on Service records Object :

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

4. Select the related object “ Appointment ” and click next.
5. Make it a required field so click on Required.
6. Scroll down for Lookup Filter and click on Show filter settings.
7. Now add the filter criteria.
8. Field : Appointment: Appointment Date >> Operator : less than >> select field >> Appointment: Created Date(Create Appointment Date field in Appointment object) .
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.

3. 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

1.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.

2.Creation of Another Checkbox Field on Appointment Object:

1. Repeat the steps form 1 to 3.
2. Give the Field Label : Repairs
3. Field Name : is auto populated
4. Default value : unchecked
5. Click on next >> next >> save.
6. Follow the same and create another checkbox with given names

7. Give the Field Label : Replacement Parts
8. Field Name : is auto populated
9. Default value : unchecked
10. Click on next >> next >> save.

3. Creation of Checkbox Field on Service records Object :

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

Note:

(Creation Of Date Fields in Appointment Object

Creation Of Currency Fields in appointment And bill feedback object

Creation Of Picklist Fields in Service and bill feedback object

Creating Formula Field In Service Records Object)

Do this same as the above step just choose the appropriate data type of fields

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

- Setup Path:** SETUP > OBJECT MANAGER > Customer Details
- Section:** Fields & Relationships
- Table Headers:** FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, INDEXED
- Table 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		
- Left Sidebar:** Includes links for Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, and Restriction Rules.

Screenshot of the Salesforce Object Manager showing the fields and relationships for the 'Appointment' object.

Fields & Relationships

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

Details

- 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

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Screenshot of the Salesforce Object Manager showing the fields and relationships for the 'Service records' object.

Fields & Relationships

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

Details

- 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

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The screenshot shows the Salesforce Object Manager Fields & Relationships page for the 'Billing details and feedback' object. The left sidebar is titled 'Fields & Relationships' and lists various setup categories. The main content area displays a table of fields:

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

The status bar at the bottom shows system information: 26°C Haze, Search, File, Home, Recent, 18:11, ENG IN, 05-11-2024.

Task 5 (Validation Rule Creation)

1. 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.

2. To Create A Validation Rule To An Service Records Object

1. Go to the setup page >> click on object manager >> From drop down click edit for Service records object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as “ service_status_note ”.
4. Insert the Error Condition Formula as : -
`NOT(ISPICKVAL(Service_Status_c , "Completed"))`
5. Enter the Error Message as “still it is pending”, select the Error location as Field and select the field as “Service status”, and click Save.

3. To Create A Validation Rule To An Billing Details And Feedback Object

1. Go to the setup page >> click on object manager >> From drop down click edit for Billing details and feedback object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as “ rating_should_be_less_than_5”.
4. Insert the Error Condition Formula as :-
NOT(REGEX(Rating_for_service_c , "[1-5]{1}"))
5. Enter the Error Message as “rating should be from 1 to 5”, select the Error location as Field and select the field as “Rating for Service”, and click Save.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for Student - Skill Wallet, Appointment | Salesforce, Object Manager | Salesforce, Google Account, and Welcome to the Salesforce Virt. Below the tabs is a search bar labeled "Search Setup". The main content area displays the "Validation Rules" section for the "Appointment" object. The sidebar on the left lists various setup options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The "Validation Rules" table has one item listed:

Rule Name	Error Location	Error Message	Active	Modified By
Vehicle	Vehicle number plate	Please enter valid number	✓	regalla sravya, 29/10/2024, 2:14 pm

The bottom of the screen shows the Windows taskbar with various icons and system status information.

The screenshot shows the Salesforce Object Manager interface for the 'Service records' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main content area displays a table titled 'Validation Rules' with one item:

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
service_status_note	Service Status*	still it is pending	✓	regalla sravya, 29/10/2024, 2:17 pm

The status bar at the bottom shows the URL: <https://ddm00004izrruaw-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdM000002zLcf/ValidationRules/view>.

The screenshot shows the Salesforce Object Manager interface for the 'Billing details and feedback' object. The left sidebar lists various setup options. The main content area displays a table titled 'Validation Rules' with one item:

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
rating_should_be_less_than_5	Rating for service	rating should be from 1 to 5	✓	regalla sravya, 29/10/2024, 2:19 pm

The status bar at the bottom shows the URL: <https://ddm00004izrruaw-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01IdM000002zLml/ValidationRules/view>.

Task 6 (Duplicate Rule Creation)

1. To Create A Matching Rule To An Customer Details Object

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

Field	Matching Method
1. Gmail	Exact
2. Phone Number	Exact
8. Click save.
9. After Saving Click on Activate.

2. 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.

Task 7 (Profiles Creation)

Manager Profile

1. To create a new profile:

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

The screenshot shows the Salesforce Setup interface for managing Profiles. The top navigation bar includes links for Student - Skill Wallet, Profiles | Salesforce, Object Manager | Salesforce, Google Account, and Welcome to the Salesforce Virt. Below the bar, there's a search bar labeled 'Search Setup' and various browser icons. The main content area has a header 'Profiles' with a 'SETUP' button. On the left, a sidebar shows 'Users' and 'Profiles'. A search bar at the top of the profiles section contains 'profile'. The main table lists profiles with columns for Action, Profile Name, User License, and Custom. The 'Manager' profile is selected, indicated by a checked checkbox in the 'Action' column. Other profiles listed include Marketing User, Minimum Access - API Only Integrations, and Minimum Access - Salesforce. The bottom of the page shows pagination and a status bar with system information like '26°C Haze' and '18:14 05-11-2024'.

Action	Profile Name	User License	Custom
<input type="checkbox"/> Del Clone	Manager	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/> Clone	Marketing User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/> Clone	Minimum Access - API Only Integrations	Salesforce Integration	<input type="checkbox"/>
<input type="checkbox"/> Clone	Minimum Access - Salesforce	Salesforce	<input type="checkbox"/>

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. The main page displays the 'Manager' profile. The 'Profile Overview' section includes fields for Description (Salesforce), User License (Salesforce), Created By (regalla.sravya), and Last Modified By (regalla.sravya). The 'Assigned Users' section shows the profile is assigned to regalla.sravya. The 'Apps' section is expanded, showing settings for Assigned Apps, Assigned Connected Apps, Object Settings, App Permissions, Apex Class Access, Visualforce Page Access, and External Data Source Access. A note at the bottom states: "Settings that apply to Salesforce apps, such as Sales, and Platform". The browser address bar shows the URL: ddm000004izruaw-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edM000007oBVh%3Fs%3DAssignedApps%26idtp%3Dp1".

Open assigned apps and select garage management system as default.

The screenshot shows the 'Assigned Apps' section of the Manager profile. The 'Assigned Apps' table lists various standard and custom applications, each with 'Visible' and 'Default' checkboxes. The 'Garage Management Application' (Garage_Management_Application) has its 'Default' checkbox checked. The browser address bar shows the URL: ddm000004izruaw-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00edM000007oBVh%3Fs%3DAssignedApps%26idtp%3Dp1".

App Name	Visible	Default
All Tabs (standard__AllTabSet)	<input type="checkbox"/>	<input type="checkbox"/>
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="checkbox"/>
Automation (standard__FlowsApp)	<input type="checkbox"/>	<input type="checkbox"/>
Bolt Solutions (standard__LightningBolt)	<input type="checkbox"/>	<input type="checkbox"/>
Community (standard__Community)	<input type="checkbox"/>	<input type="checkbox"/>
Content (standard__Content)	<input type="checkbox"/>	<input type="checkbox"/>
Data Manager (standard__DataManager)	<input type="checkbox"/>	<input type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input type="checkbox"/>	<input type="checkbox"/>
Garage Management Application (Garage_Management_Application)	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input type="checkbox"/>	<input type="checkbox"/>
Marketing CRM Classic (standard__Marketing)	<input type="checkbox"/>	<input type="checkbox"/>
Queue Management (standard__QueueManagement)	<input type="checkbox"/>	<input type="checkbox"/>
Sales (standard__LightningSales)	<input type="checkbox"/>	<input type="checkbox"/>
Sales (standard__Sales)	<input type="checkbox"/>	<input type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input type="checkbox"/>	<input type="checkbox"/>

Profile Manager

Find Settings | Clone | Delete | Edit Properties

Profile Overview > Object Settings > Appointments

Appointments

Tab Settings
Default On

Record Types and Page Layout Assignments

Record Types	Page Layout Assignment	Assigned Record Types	Default Record Type
-Master-	Appointment Layout	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
View All	<input checked="" type="checkbox"/>
Modify All	<input checked="" type="checkbox"/>

Manager

Find Settings | Clone | Delete | Edit Properties

Profile Overview > Object Settings > Service records

Service records

Tab Settings
Default On

Record Types and Page Layout Assignments

Record Types	Page Layout Assignment	Assigned Record Types	Default Record Type
-Master-	Service records Layout	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Object Permissions

Permission Name	Enabled
Read	<input checked="" type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input checked="" type="checkbox"/>
View All	<input checked="" type="checkbox"/>
Modify All	<input checked="" type="checkbox"/>

Field Permissions

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

- Tab Bar:** Student - Skill Wallet, Profiles | Salesforce, Object Manager | Salesforce, Google Account, Welcome to the Salesforce Virt...
- Page Header:** Search Setup, Help for this Page
- Left Sidebar:** Setup, Home, Object Manager, a search bar with "profile", and a message: "Didn't find what you're looking for? Try using Global Search."
- Main Content Area:**
 - Section:** Profile Manager
 - Buttons:** Find Settings, Clone, Delete, Edit Properties
 - Breadcrumb:** Profile Overview > Object Settings > Billing details and feedback
 - Section:** Billing details and feedback
 - Sub-section:** Tab Settings, Default On
 - Section:** Record Types and Page Layout Assignments

Record Types	Page Layout Assignment	Assigned Record Types	Default Record Type
-Master-	Billing details and feedback Layout		

 - Section:** Object Permissions

Permission Name	Enabled
Read	<input type="checkbox"/>
Create	<input type="checkbox"/>
Edit	<input checked="" type="checkbox"/>
Delete	<input type="checkbox"/>
View All	<input type="checkbox"/>
Modify All	<input checked="" type="checkbox"/>
- Bottom Status Bar:** https://ddm00004izrruaw-dev-ed.develop.my.salesforce.com/one/one.app#/alohaRedirect/00edM000007oBvh?isObjectsAndTabs&o=01ldM000002zLmI&isotp=p1, 26°C Haze, Search, File Explorer, Task View, Edge, Google Chrome, File, 18:23, ENG IN, 05-11-2024

2. Sales Person Profile:

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Salesforce Platform User) >> enter profile name (sales person) >> Save.
2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the GArage management.
4. Scroll down to Custom Object Permissions and Give access permissions for Appointments,Billing details and feedback , service records and customer details objects as mentioned in the below diagram.
5. And click save.

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

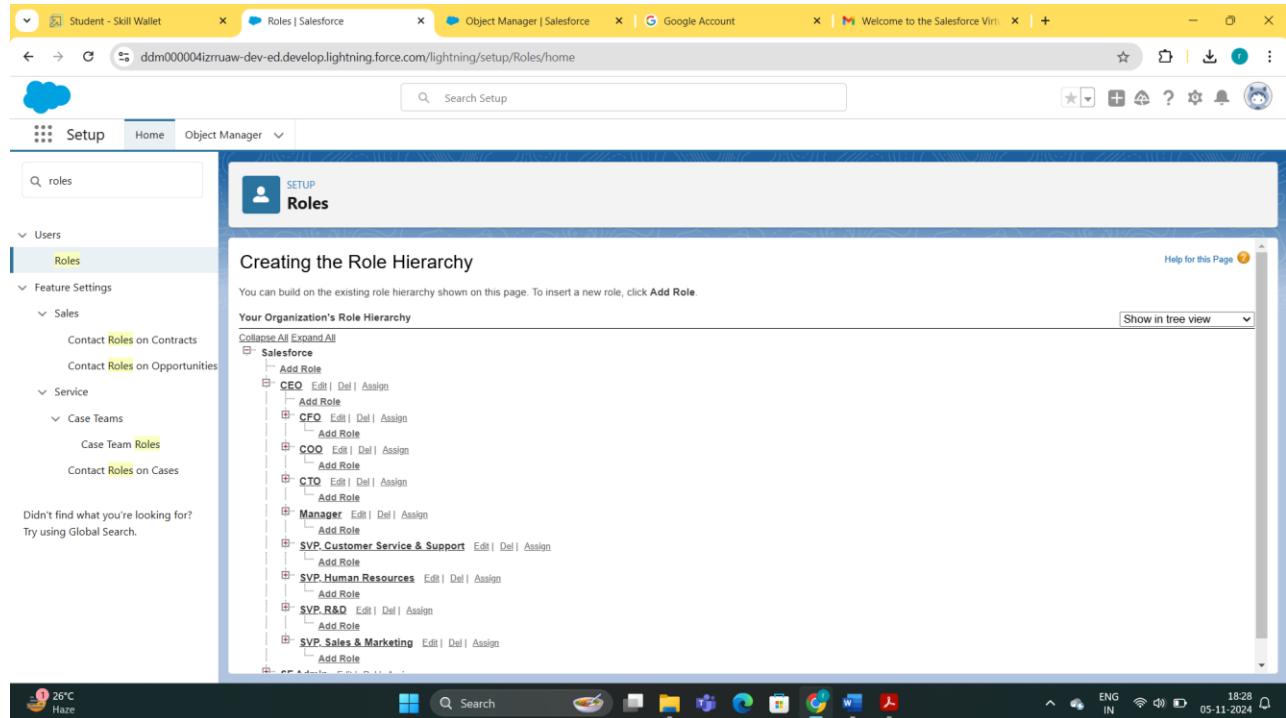
- Profile Detail:**
 - Name: sales person
 - User License: Salesforce Platform
 - Description:
 - Created By: Ajay Sharma 02/10/2024, 11:50 am
 - Modified By: Ajay Sharma 02/10/2024, 11:52 am
 - Custom Profile: checked
- Page Layouts:**

Object	Layout Type	Assignment
Lead	Global Layout	[View Assignment]
Location	Global Layout	[View Assignment]
Location Group	Global Layout	[View Assignment]
Location Group Assignment	Global Layout	[View Assignment]
Object Milestone	Global Layout	[View Assignment]
Operating Hours	Global Layout	[View Assignment]
Order	Global Layout	[View Assignment]
Order Product	Global Layout	[View Assignment]
Payment	Global Layout	[View Assignment]
- Custom Object Permissions:**
 - Log In IP Ranges: Enabled
 - Enabled Apex Class Access: Enabled
 - Enabled Visualforce Page Access: Enabled
 - Enabled External Data Source Access: Enabled
 - Enabled Named Credential Access: Enabled
 - Enabled External Credential Principal Access: Enabled
 - Enabled Custom Metadata Type Access: Enabled
 - Enabled Custom Permissions: Enabled
 - Enabled Custom Setting Definitions Access: Enabled
 - Enabled Flow Access: Enabled
 - Enabled Service Presence Status Access: Enabled
 - Enabled Custom

Task 8 (Role & Role Hierarchy Creation)

1. Creating Manager Role

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



2. Creating Sales Person Roles

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

The screenshot shows the Salesforce Setup interface with the 'Roles' page selected. The left sidebar has 'Users' expanded, with 'Roles' selected. The main content area displays the 'Your Organization's Role Hierarchy' tree. The hierarchy includes:

- Salesforce
 - Add Role
 - CEO** Edit | Del | Assign
 - Add Role
 - CFO** Edit | Del | Assign
 - Add Role
 - COO** Edit | Del | Assign
 - Add Role
 - CTO** Edit | Del | Assign
 - Add Role
 - Manager** Edit | Del | Assign
 - Add Role
 - sales_person** Edit | Del | Assign
 - Add Role
 - SVP.Customer_Service & Support** Edit | Del | Assign
 - Add Role
 - SVP.Human_Resources** Edit | Del | Assign
 - Add Role
 - SVP.R&D** Edit | Del | Assign
 - Add Role
 - SVP.Sales & Marketing** Edit | Del | Assign
 - Add Role
 - SF Admin** Edit | Del | Assign
 - Add Role

Task 9 (Users Creation)

1. Create User(Manager Role):

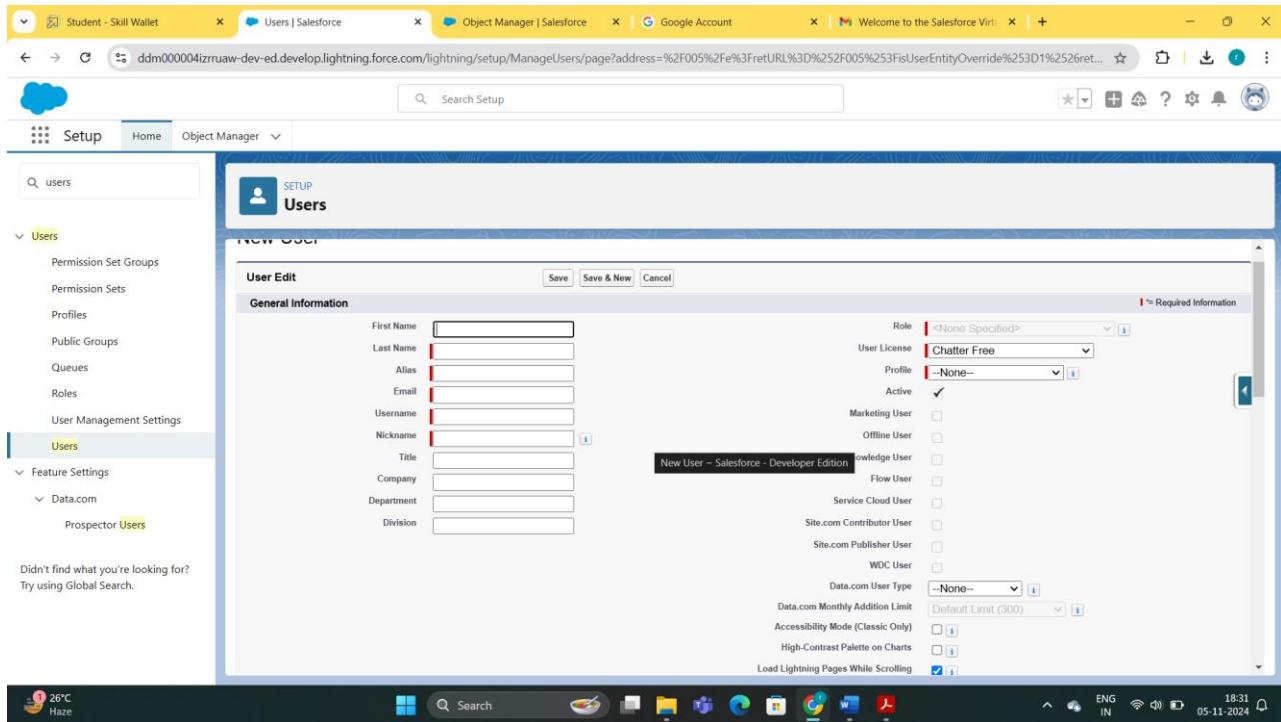
1. Go to setup >> type users in quick find box >> select users >> click New user.
2. Fill in the fields
3. First Name : Niklaus
4. Last Name : Mikaelson
5. Alias : Give a Alias Name
6. Email id : Give your Personal Email id
7. Username : Username should be in this form: text@text.text
8. Nick Name :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

2..Creating Another Users(Sales Role):

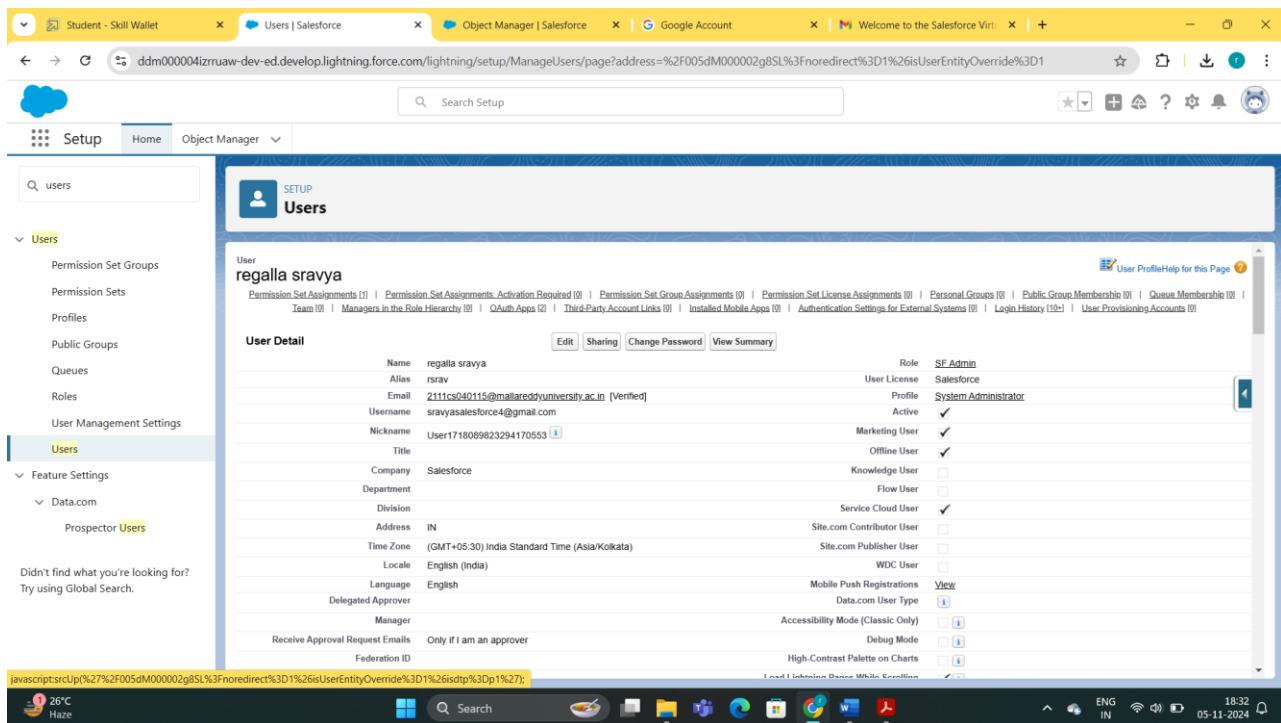
1. Repeat the steps and create another user using

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

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatty.00ddm0000004izrruaw.nugakety0zb@chatter.salesforce.com	Research Team	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Concepcion Morales, Maria	mconc	m_c_morales.no.reply.xw5xnic40m.x8q7korvypf.tffnfw4jhh@gmail.com	Research Manager	<input type="checkbox"/>	Research Users
<input type="checkbox"/> Edit	Efigueroa, Jose	jfgu	Jfigueroa.no.reply.9l9cx5d1t192s3q2giowly.b7v77mt0a@gmail.com	Research Manager	<input type="checkbox"/>	Research Manager
<input type="checkbox"/> Edit Login	Mikaelson, Niklaus	mika	niklaus123@gmail.com	Manager	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/> Edit Login	Olivera, Leonardo	lolv	Lolivera.no.reply.us5lhwwhe9x.dpyc25hom6yk.8boseqslldv@gmail.com	Research Team	<input type="checkbox"/>	Research Users
<input type="checkbox"/> Edit Login	sathwika, peddolla	psaty	sathwika123@gmail.com	Salesperson	<input checked="" type="checkbox"/>	Salesperson
<input type="checkbox"/> Edit Login	shruthi, buddu	bshru	buddesruth23@gmail.com	Salesperson	<input checked="" type="checkbox"/>	Salesperson
<input type="checkbox"/> Edit	sravya, regala	rstrav	sravyasalesforce4@gmail.com	SF Admin	<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit Login	sravya, regala	sravas	sravas463@gmail.com	Salesperson	<input checked="" type="checkbox"/>	Salesperson
<input type="checkbox"/> Edit	Thomasson, Sam	sthom	sam.thomasson.coe.co5sxgv0dyuy.refqybh0uxgu.oldfmfbuoflo.v945tgxact4@gmail.com	CTO	<input type="checkbox"/>	Standard Platform User
<input type="checkbox"/> Edit	User Inactive	inactive	a.ellington.coe.g0bb7yineon.lqas5chtylu.47sxeettudo@gmail.com		<input type="checkbox"/>	Force.com - Free User
<input type="checkbox"/> Edit	User Inactive	inactiv	user16567013228546579454.lrxhm20huf9.ltbozmyhf22rl.cvd8usd7chq@gmail.com		<input type="checkbox"/>	Force.com - Free User



Fill the above details and the stored data of users will be displayed like below.



Task 10 (Public Groups Creation)

Public Groups in Salesforce are collections of users that can be defined for sharing rules, access permissions, or collaboration purposes. These groups can include individual users, roles, or other groups, making them versatile for managing access and data visibility across the organization.

Purpose of Public Groups:

1. **Access Control:** Public Groups allow administrators to define who has access to certain records or data. For example, you can use Public Groups to grant access to certain objects, records, or folders to a specific group of users.
2. **Sharing Rules:** Public Groups are often used in sharing rules to control data visibility. By assigning records to a Public Group, you can ensure that only members of the group have access to those records, without the need to individually configure permissions for each user.
3. **Collaboration:** Public Groups can be used to facilitate collaboration among users. For instance, a Public Group could be created for a specific department or project team, allowing members to easily share files, Chatter posts, and other resources.

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 Public Groups page. The URL in the browser is <https://ddm00004izruaw-dev-ed.develop.lightning.force.com/lightning/setup/PublicGroups/home>. The page title is "Public Groups". A sidebar on the left lists various setup categories like Users, Feature Settings, and Company Settings. The "Public Groups" section is selected. The main content area displays a table of public groups:

Action	Label	Group Name	Created By	Created Date
Edit	IT	IT	sravya_regalia	11/06/2024, 12:40 pm
Edit	sales_team	sales_team	sravya_regalia	30/10/2024, 11:31 am

Task 11 (Sharing Setting Creation)

Sharing Settings in Salesforce are configurations that determine the level of access users have to data across the organization. They control how records are shared among users and help define the default access level for each object in Salesforce. Sharing Settings are essential for balancing data security with collaboration needs.

Creating Sharing Settings

1. Go to setup >> type users in quick find box >> select Sharing Settings >> click Edit.
2. Change the OWD setting of the Service records Object to private as shown in fig.
3. Click on save and refresh.
4. Scroll down a bit, Click new on Service records sharing Rules.
5. Give the Label name as “ Sharing setting”
6. Rule name is auto populated.
7. In step 3 : Select which records to be shared, members of “ Roles ” >> “ Sales person”
8. In step 4: share with, select “ Roles ” >> “ Manager ”
9. In step 5 : Change the access level to “ Read / write ”.
10. Click on save.

Task 12 (Flows Creation)

Flows in Salesforce are a powerful tool for automating complex business processes through a visual interface. They allow administrators and developers to build custom workflows without needing to write code, making it easier to implement automation that meets specific business requirements.

Create A Flow:

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

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

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

Amount paid : {!\$Record.Payment_Paid_c}

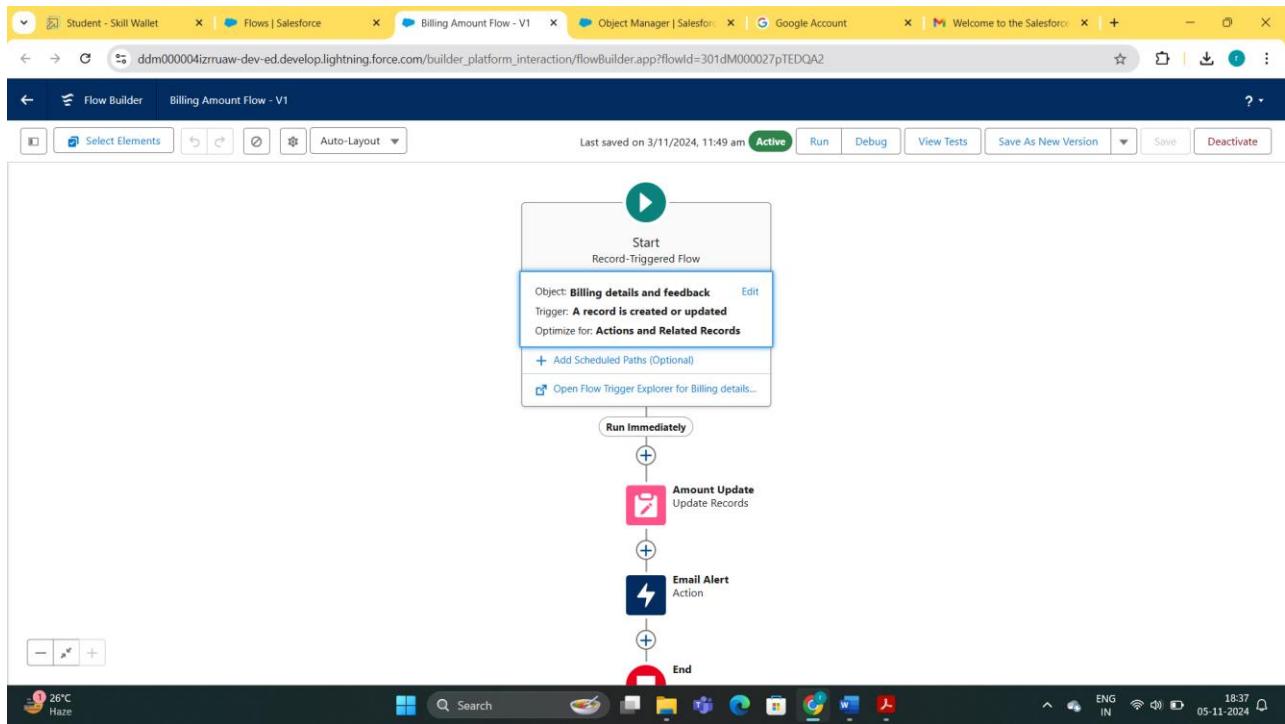
Thank you for Coming .

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

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

The screenshot shows the Salesforce Setup Flows page. The URL in the browser is <https://ddm00004izruaw-dev-ed.develop.lightning.force.com/lightning/setup/Flows/home>. The page title is "SETUP Flows". On the left, there's a sidebar with categories like Process Automation (Flows highlighted), Identity, and Login Flows. A search bar at the top says "Search Setup" and has a placeholder "flows". The main content area has a section titled "Try the Automation Lightning App!" with a cartoon character illustration. Below it is a table titled "Flow Definitions" with a "All Flows" dropdown. The table has columns for Flow Label, Process Type, Active, Test, Package State, Pac..., Last Modified, and Last Modified Date. There are 44 items listed, sorted by Flow Label. The first few rows include "Add or Modify Service Appointment Attendees" (Salesforce Scheduler Flow, Active, Managed-Installed), "Basic Approval Request" (Flow Orchestration for CMS, Active, Managed-Installed), "Billing Amount Flow" (Autolaunched Flow, Active, Unmanaged, last modified by regalla sravya on 03/11/2024, 11:49 am), "Book Appointment from Invitation" (Salesforce Scheduler Flow, Active, Managed-Installed), and "Cancel Item Flow" (Screen Flow, Active, Managed-Installed). At the bottom of the page, there's a link "Change Case Owner to Incident Owner". The system status bar at the bottom shows "26°C Haze", "ENG IN", "18:34", "05-11-2024", and battery level.

Flow Label	Process Type	Active	Test	Package State	Pac...	Last Mod...	Last Modified Date
Add or Modify Service Appointment Attendees	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Basic Approval Request	Flow Orchestration for CMS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Billing Amount Flow	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged	regalla sravya	03/11/2024, 11:49 am	
Book Appointment from Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Change Case Owner to Incident Owner	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			



Task 13 (Apex Trigger Creation)

Apex Triggers in Salesforce are pieces of code that run automatically in response to specific events on a particular Salesforce object. These events include actions like creating, updating, deleting, or undeleting records. Triggers are used to perform operations before or after these events, allowing developers to customize and automate business processes in ways that standard configurations and workflows can't achieve.

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”.

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

Code:

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

Task 14 (Reports Creation)

Reports

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

Types of Reports in Salesforce

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

Create A Report Folder

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

Sharing A Report Folder

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

Create Report Type

1. Go to setup >> type users in quick find box >> select Report Type >> click on Continue.
2. Click on new custom report type.
3. Select the Primary object as “ Customer details” .
4. Give the Report type Label as “ Service information ”
5. Report type Name is 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 a
11. Again Click to relate another object.
12. And select the related object as “ service records”.
13. Repeat the process and select the related object as “ Billing details and feedback”.
14. And click on save.

Create Report

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

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

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

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

The screenshot shows the Salesforce Lightning interface. The main area is the Reports page, specifically the 'Recent' section. It lists one item: 'New Service information Report'. The details for this report are as follows:

Report Name	Description	Folder	Created By	Created On	Subscribed
New Service information Report		Garage Management Folder	regalla stravya	4/11/2024, 3:10 pm	

The sidebar on the left provides navigation links for 'RECENT', 'REPORTS', 'FOLDERS', and 'FAVORITES'. The top navigation bar includes links for 'Customer Details', 'Appointments', 'Service records', 'Billing details and feedback', 'Reports', and 'Dashboards'. The bottom of the screen features a taskbar with various application icons.

Screenshot of a Salesforce report titled "New Service information Report".

Total Records: 5 Total Payment Paid: ₹16,000

Sum of Payment Paid

Rating for service

Rating for service	Count	Sum of Payment Paid
1	1	₹0
3	3	₹16,000
4	1	₹0
5	0	₹0

Report filters: Rating for service ↑, Payment Status ↑, Customer Name ↴, Appointment Date ↴, Service Status ↴, Payment Paid ↴

Report details:

Rating for service	Count	Customer Name	Appointment Date	Service Status	Payment Paid
1 (1)	Pending (1)	sindhu	03/11/2024	Completed	-

Report controls: Row Counts, Detail Rows, Subtotals, Grand Total

System status bar: ENG IN, 18:44, 05-11-2024

Screenshot of a Salesforce report titled "New Service information Report".

Report filters: Rating for service ↑, Payment Status ↑, Customer Name ↴, Appointment Date ↴, Service Status ↴, Payment Paid ↴

Report details:

Rating for service	Count	Customer Name	Appointment Date	Service Status	Payment Paid
1 (1)	Pending (1)	sindhu	03/11/2024	Completed	-
					₹0
					₹0
2 (1)	Pending (1)	sindhu	03/11/2024	Completed	-
					₹0
					₹0
3 (1)	Completed (1)	sindhu	03/11/2024	Completed	₹8,000
					₹8,000
					₹8,000
4 (1)	Completed (1)	sindhu	03/11/2024	Completed	₹8,000
					₹8,000
					₹8,000
5 (1)	Pending (1)	sindhu	03/11/2024	Completed	-
					₹0
					₹0
					₹0
					₹16,000

Report controls: Row Counts, Detail Rows, Subtotals, Grand Total

System status bar: ENG IN, 18:44, 05-11-2024

Task 15 (Dashboards Creation)

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

Create Dashboard Folder

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

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.
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.

Customer review

Last refreshed 1 day ago. Refresh this dashboard to see the latest data.

As of 04-Nov-2024, 3:16 pm Viewing as regalla stravya

New Service information Report

Sum of Payment Paid

Rating for service

Payment Status

Status	Count
Pending	1
Completed	1

View Report (New Service information Report)

AH3 / NH44 / Construction

Search

18:45 05-11-2024

THANKYOU