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 powerfulfeatures, GMS empowersgarages to thrive in a competitive market while ensuring a seamless and satisfying experience for both customers and staff.The **Garage Management System (GMS)** is a comprehensive software solution designed to streamline and optimize the operations of automotive repair facilities, service centers, and garages. It provides an array of features tailored to meet the needs of mechanics, service advisors, and business owners, ensuring smoother workflows and highercustomer satisfaction

1. **Appointment Scheduling**:
    a. Simplifies the booking processfor customers.
    b. Enables staff to managedaily schedules efficiently, reducing downtime and improving resourceallocation.
2. **Vehicle Management**:
    a. Maintains detailed records of vehicles,including service history,repairs, and maintenance schedules.
    b. Tracks vehicle status during servicing for better communication with customers.
3. **Customer Relationship Management(CRM)**:
    a. Stores customer details and preferences.
    b. Sends service reminders, follow-ups, and promotional offers to build loyalty.
4. **Inventory and Spare Parts Management**:
    a. Tracks spare parts stocklevels, automates reorderprocesses, and preventsstockouts.
    b. Ensures that mechanics always have the necessary tools and parts on hand.
5. **Billing and Invoicing**:
    a. Generates professional invoices quickly and accurately.
    b. Supports multiple payment methods,discounts, and tax calculations.
6. **Work Order Management**:
    a. Creates detailed work orderswith a list of tasks,estimated costs, and

timelines.

b. Helps staff prioritize jobs and ensurestimely completion.

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

Salesforce

Introduction:

Are you new to Salesforce? Not sure exactlywhat it is, or how to use it? Don't know where you shouldstart on your learning journey?If you've answeredyes to any of thesequestions, then you're in the right place. This moduleis for you.
Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge forthis module, we'll take you through these features and answer the question, "What is Salesforce, anyway?".

What Is Salesforce?

Salesforce is your customer successplatform, designed to help you sell, service,market,analyze, and connect with your customers.
Salesforce has everything you need to run your business from anywhere. Using standardproducts and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securelyin thecloud.
So what does that really mean? Well, beforeSalesforce, your contacts,emails, follow-up tasks,and prospective dealsmight have been organized something like this:
https://youtu.be/r9EX3lGde5k

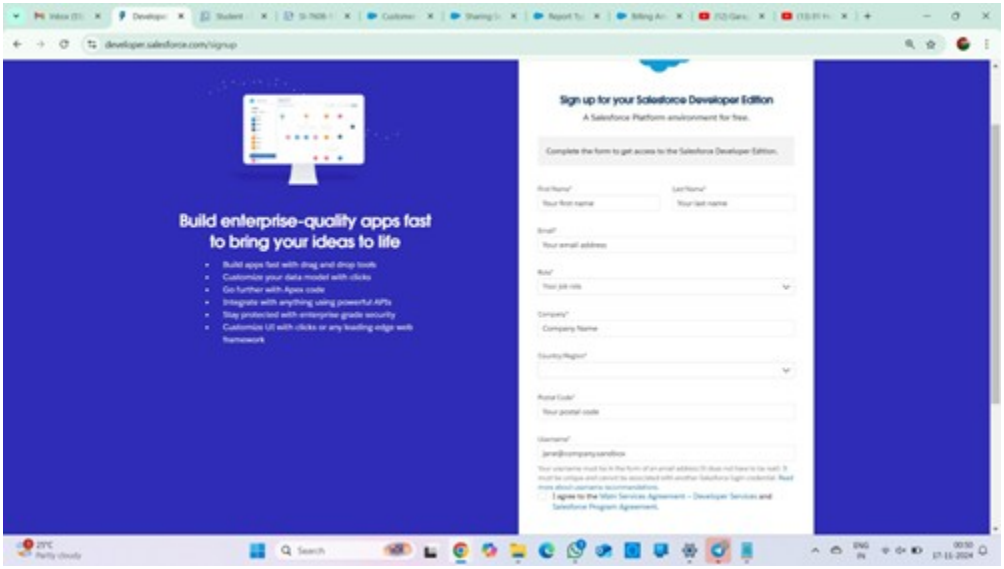
Creating DeveloperAccount:

Creating a developerorg in salesforce.

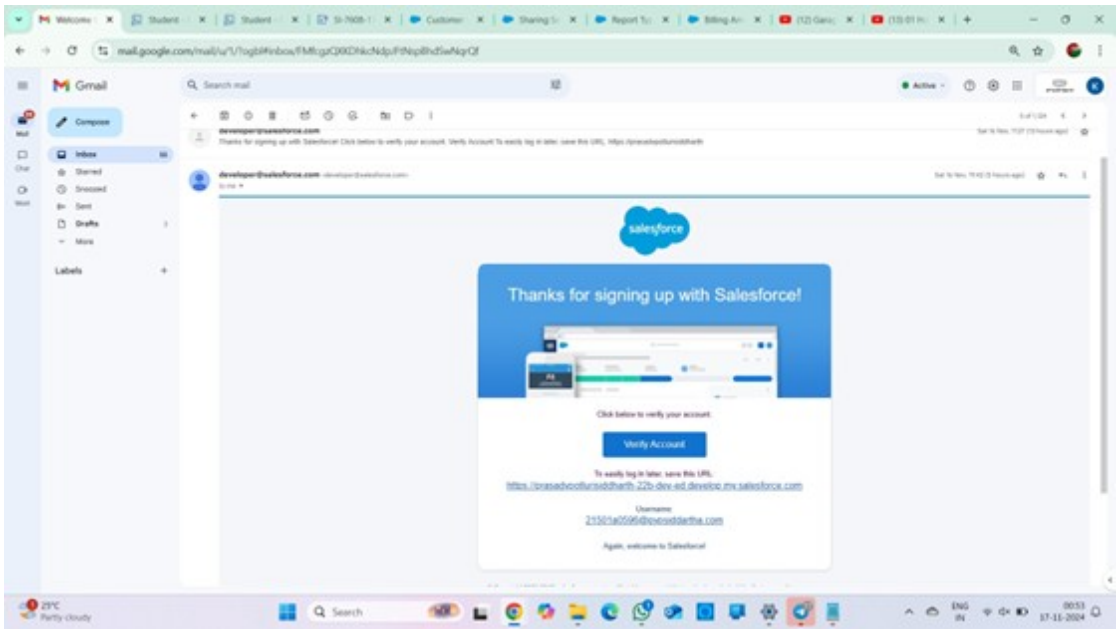
1. Go to https://developer.salesforce.com/signup
2. On the sign up form, enter the followingdetails :

1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and companyThis need not be an actual emailid, you can give anythingin the format :username@organization.com

Click on sign me up afterfilling these.



Account Activation



1. Go to the inbox of the email that you used while signingup. Click on the verify account toactivate your account.

OBJECT

What Is an Object?

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

Salesforce objectsare of two types:

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

Create Customer DetailsObject

To create an object:

1. From the setup page >> Click on ObjectManager >> Click on Create>> Click on Custom Object.

1. Enterthe label name >> CustomerDetails
2. Plural label name >>Customer Details
3. Enter RecordName Label and Format

8. Record Name >> CustomerName
9. DataType >> Text

1. Click on Allow reportsand Track Field History,
2. Allow search>> Save.

Create Appointment Object

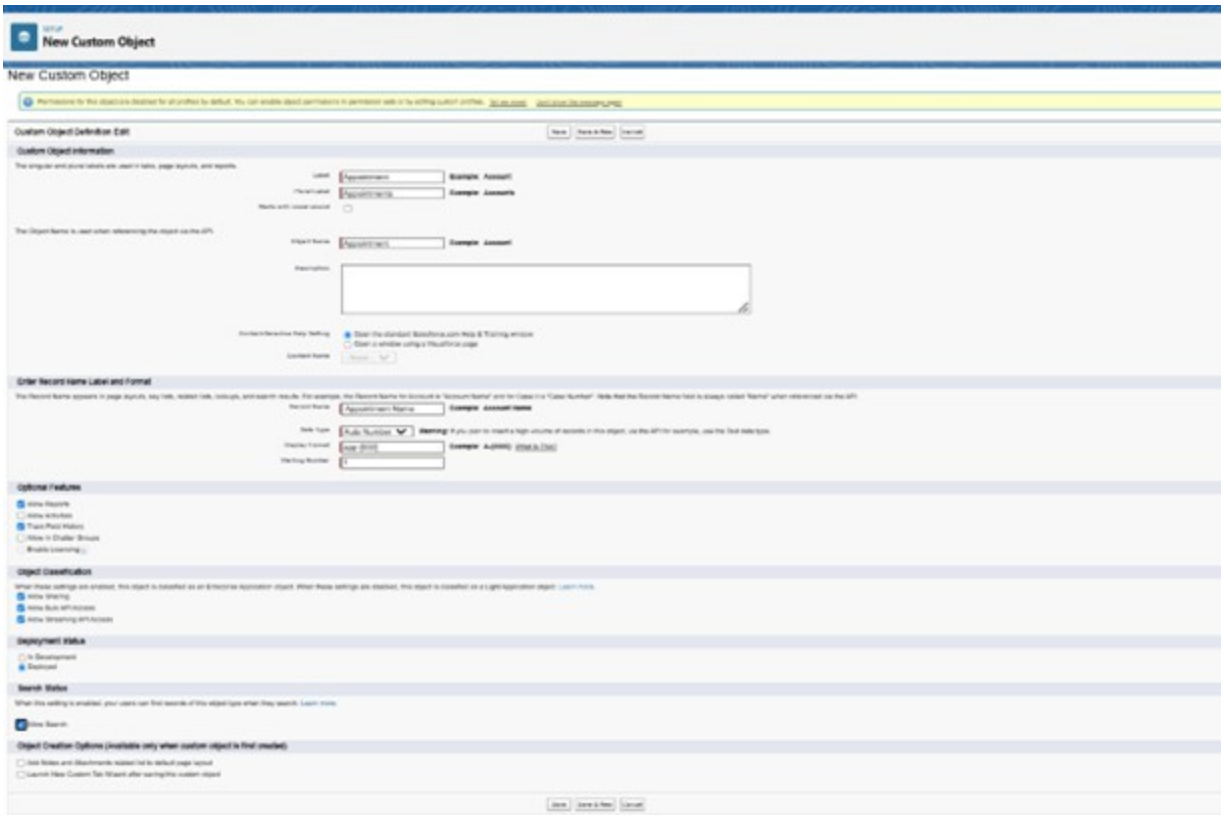
To create an object:

1. From the setup page >>Click on ObjectManager >> Click on Create >> Click on CustomObject.

1. Enterthe label name >> Appointment
2. Plural label name >>Appointments
3. EnterRecord Name Label and Format

10. Record Name >> Appointment Name
11. Data Type >> Auto Number
12. Display Format >> app-{000}
13. Starting number>> 1

1. Clickon Allow reportsand Track Field History,
2. Allowsearch >> Save.



Create Servicerecords Object

To createan object:

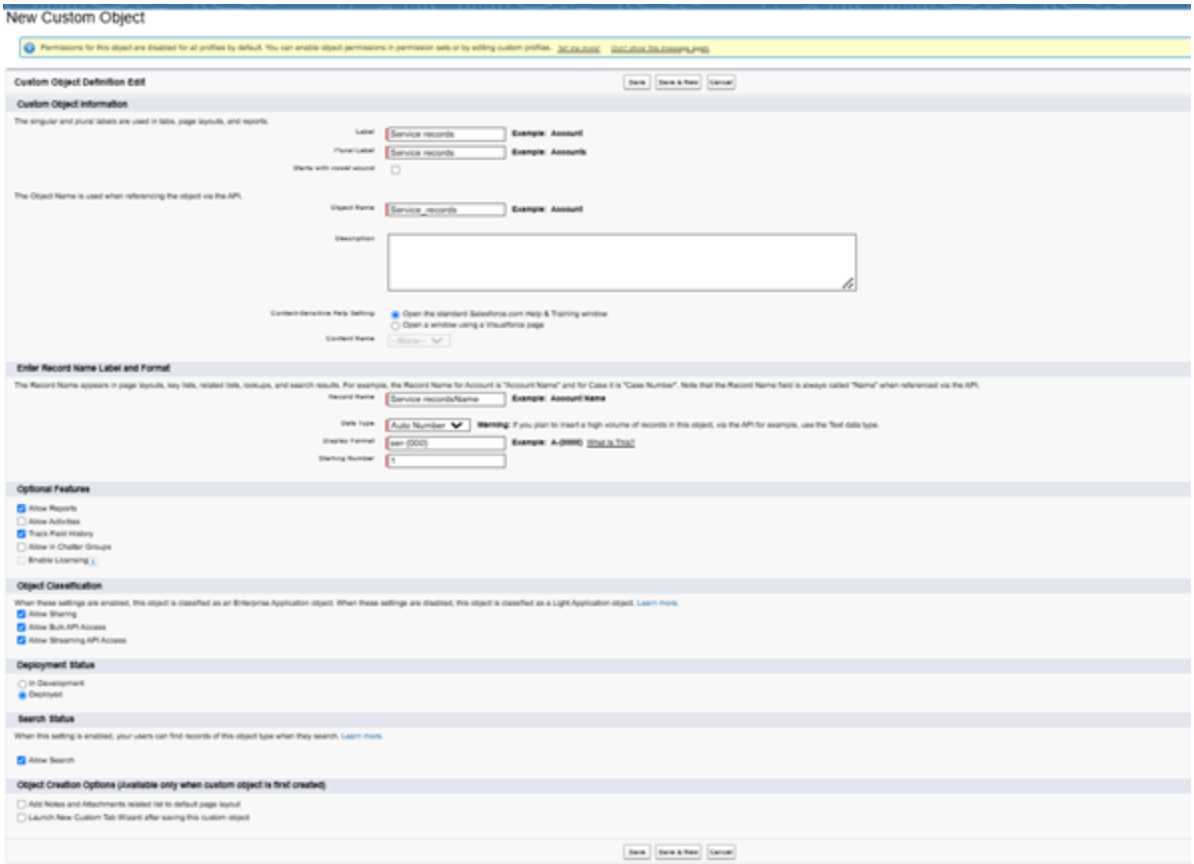
1. From the setuppage >> Clickon Object Manager>> Click on Create >>Click on CustomObject.

1. Enterthe label name >> Servicerecords
2. Plural label name >>Service records
3. EnterRecord Name Label and Format

14. Record Name >>Service recordsName
15. Data Type >> Auto Number
16. Display Format >> ser-{000}
17. Starting number>> 1

1. Clickon Allow reportsand Track Field History,

2. Allowsearch >> Save.



Create Billingdetails and feedbackObject

To createan object:

1. From the setup page >> Click on ObjectManager >> Clickon Create >>Click on CustomObject.

1. Enterthe label name >> Billingdetails and feedback
2. Plural label name >>Billing details and feedback
3. Enter RecordName Label and Format

18. Record Name >> Billingdetails and feedbackName
19. DataType >> Auto Number
20. Display Format >> bill-{000}

21. Starting number >> 1

1. Click on Allow reportsand Track Field History,
2. 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 recordsin the objects.

Types of Tabs:

1. **Custom Tabs**

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

   Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window.Web tabs make it easierfor your users to quicklyaccess content and applications they frequently use without leavingthe salesforce.com application.
3. **Visualforce Tabs**

   Visualforce Tabs are custom tabs that displaya Visualforce page. Visualforce tabs look andbehave like standard salesforce.com tabs such as accounts, contacts, and opportunities.
4. **Lightning Component Tabs**

   Lightning Component tabs allow you to add Lightning components to the navigation menu inLightning Experience and the mobile app.
5. **Lightning Page Tabs**

   Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu.

Lightning Page tabs don't work like other customtabs. Once created,they don't show up on the All Tabs page when you click the Plus icon that appearsto 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.

Creating a Custom Tab

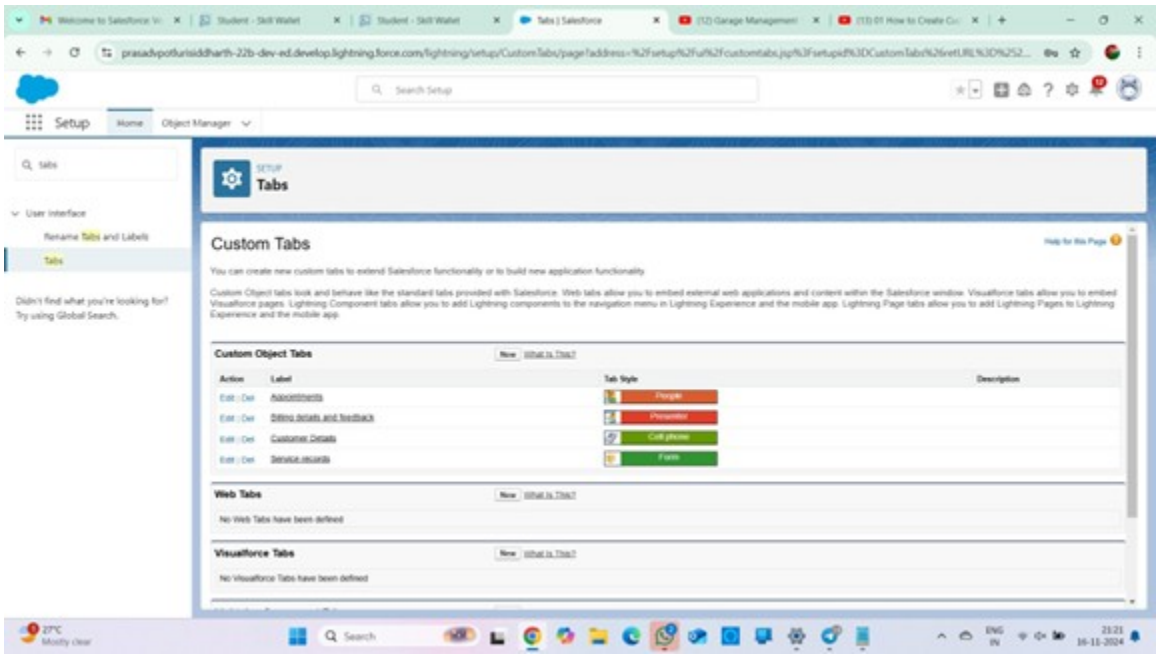
To createa Tab:(Customer Details)

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

4. Click save.

Creating RemainingTabs

1. Now createthe Tabs for the remaining Objects, they are “ Appointments, Service records,Billing detailsand 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, Lightningapps give your users access to sets of objects,tabs, and other items all inone convenient bundle in the navigation bar.

Lightning apps let you brand your apps with a custom colour and logo. You can even includea utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficientlyby easily switchingbetween apps.

Create a Lightning App

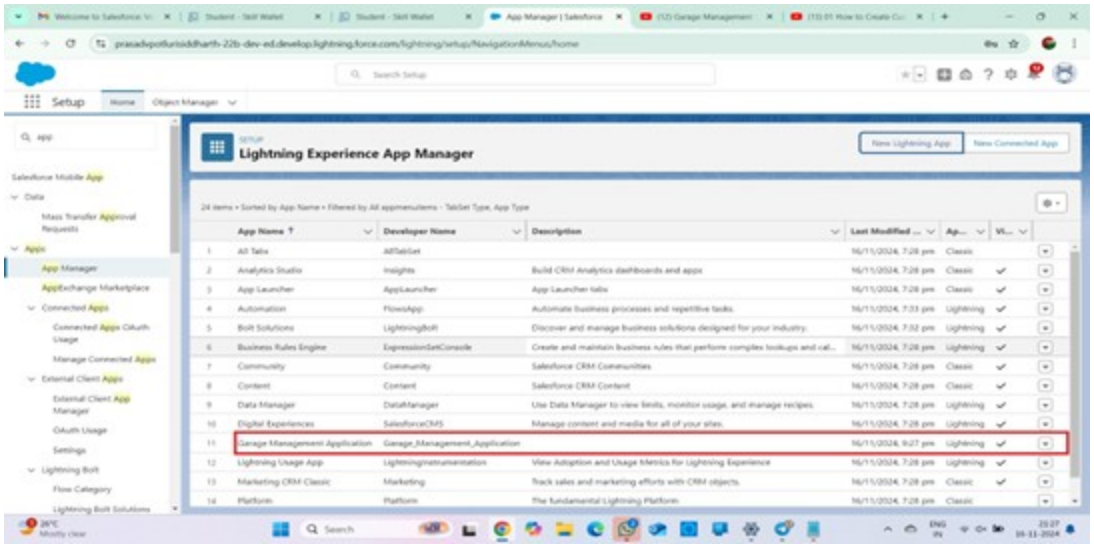
Tocreate a lightning app page:

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

2. Fill the app name in app details as Garage Management Application >> Next >>

(Appoption page) keep it as default >>Next >> (UtilityItems) keep it as default>> Next.

3. ToAdd Navigation Items:
4. Select the items (Customer Details,Appointments, Service records,Billing details and feedback, Reportsand Dashboards) from the search bar and move it using the arrow button>> Next.
5. To Add User Profiles:Search profiles (Systemadministrator) 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 requirefor a specific object. Hence,the overall searching, deletion, and editingof the records become simplerand quicker.

Types of Fields

1. Standard Fields
2. Custom Fields

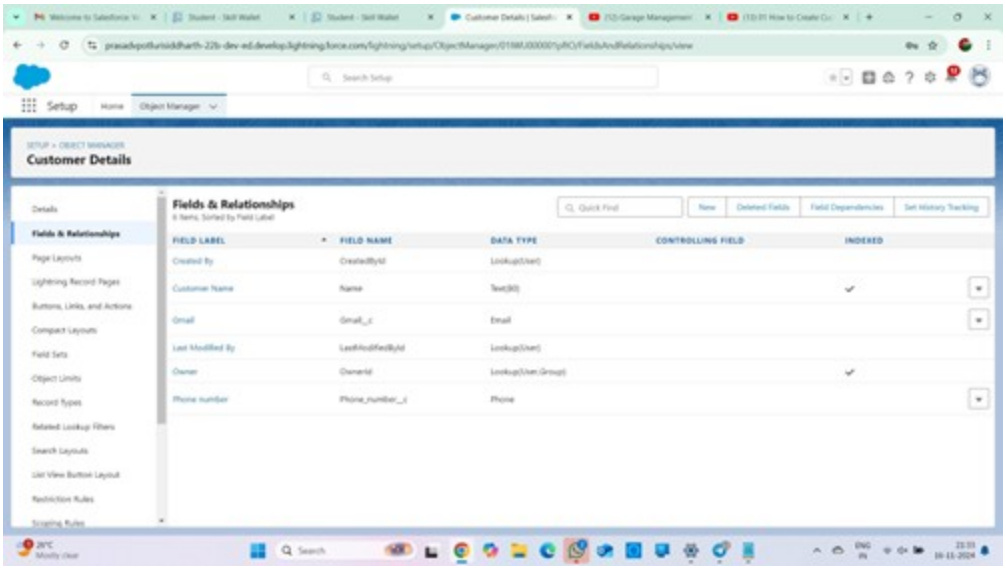
Creation of fields for the CustomerDetails object

1. **Tocreate fields in anobject:**
    a. Go to setup >>click on ObjectManager >> type object name(Customer Details) in searchbar >> clickon the object.
    b. Nowclick on “Fields& Relationships” >>New
    c. Select Data Type as a “Phone”
    d. Click on next.
    e. Fill the Above as following:

1. Field Label:Phone number
2. Field Name : gets auto generated
3. Click on Next >>Next >> Save and new.

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

2. **Tocreate another fields in an object:**
    a. Go to setup >>click on ObjectManager >> type object name(Customer Details) in searchbar >> clickon the object.
    b. Nowclick on “Fields& Relationships” >>New
    c. Select Data type as a “Email”and Click on Next
    d. Fill the Above as following:
    e. Field Label : Gmail
    f. Field Name : gets auto generated
    g. Click on Next >>Next >> Save and new.

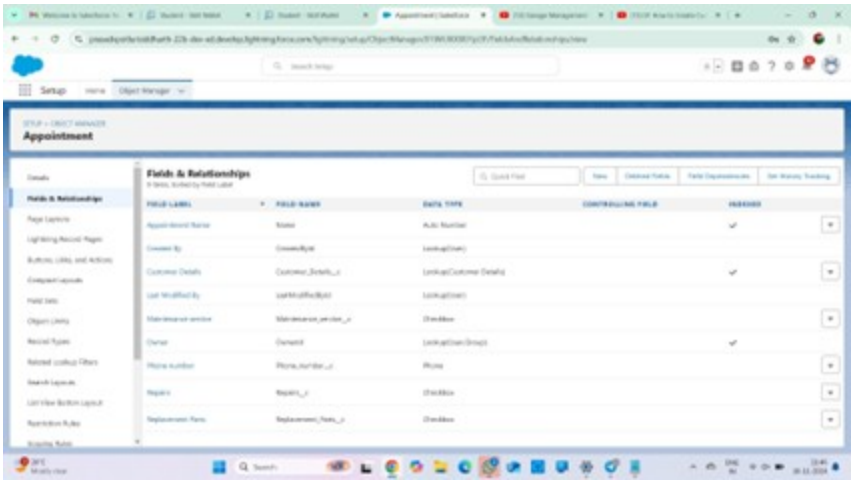


Creation of Lookup Fields

Creation of Lookup Field onAppointment Object :

1. Go to setup>> click on Object Manager>> type objectname(Appointment) in the search bar >> clickon 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 Activity4 Before continuing.



Creation of Lookup Field on Service recordsObject :

1. Go to setup >> clickon Object Manager>> type objectname(Service records) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >>New
3. Select “Look-up relationship”as data type and click Next.
4. Select the relatedobject “ Appointment ” and clicknext.
5. Make it a required field so click on Required.
6. Scroll down for LookupFilter and click on Show filter settings.
7. Now add the filter criteria.
8. Field : Appointment: Appointment Date >>Operator : less than >>select field >>Appointment: Created Date
9. Filter type should be Required.
10. Error Message : Value does not match the criteria.
11. Enable the filter by click on Active.
12. Next >> Next >>Save.

Creation of Lookup Field on Billing details and feedback Object :

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

feedback) in searchbar >> click on the object.

2. Now click on “Fields& Relationships” >>New.
3. Select “Look-up relationship” as data type and click Next.
4. Select the relatedobject “ Servicerecords” and click next.
5. Next >> Next >>Save & new.

Creation of Checkbox Fields

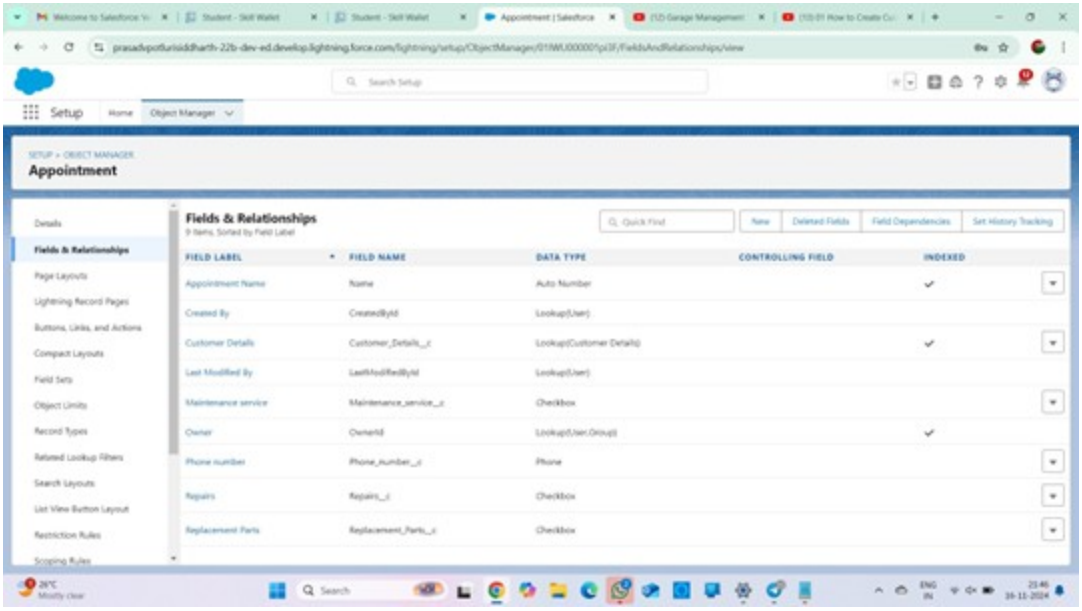
Creation of Checkbox Field on Appointment Object :

1. Go to setup >> click on ObjectManager >> type object name(Appointment) in searchbar >> 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 :

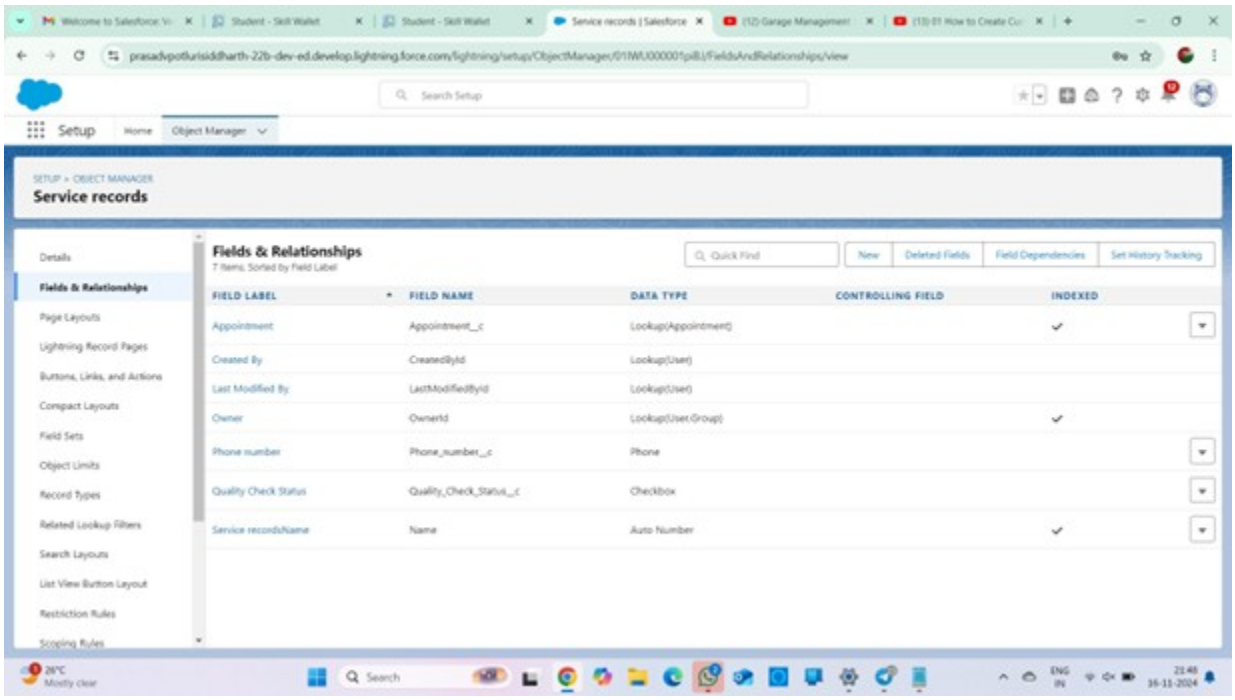
1. Repeat the steps form 1 to 3.
2. Give the Field Label : Repairs
3. Field Nme : is auto populated
4. Default value : unchecked
5. Click on next >> next >> save.
6. Follow the same and create another checkboxwith given names
7. Give the Field Label : Replacement Parts
8. Field Nme : is auto populated
9. Default value : unchecked

10. Click on next >>next >> save.



Creation of Checkbox Field on Service records Object :

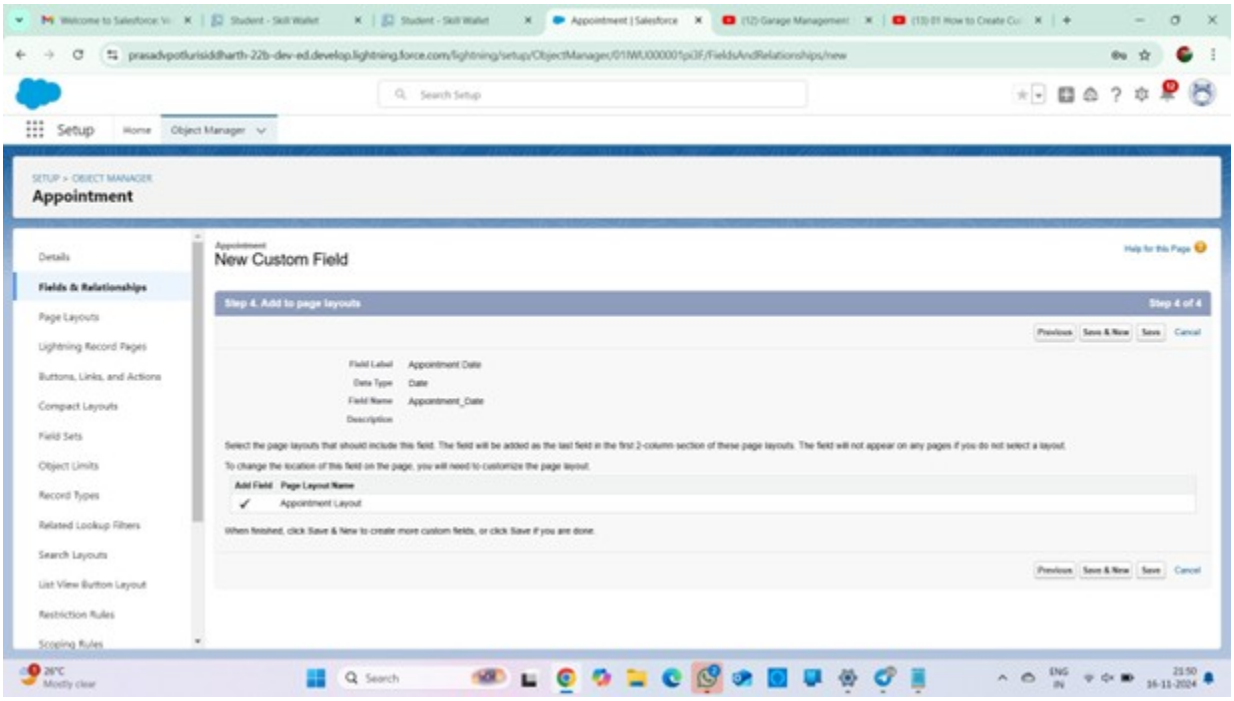
1. Go to setup >> clickon Object Manager>> type objectname(Service records) in search bar >>click on the object.
2. Now click on “Fields& Relationships” >>New.
3. Select “Check box” as data type and click Next.
4. Give the Field Label : Quality Check Status
5. Field Nme : is auto populated
6. Default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



Creation of date Fields

Creation of Date Field on Appointment Object :

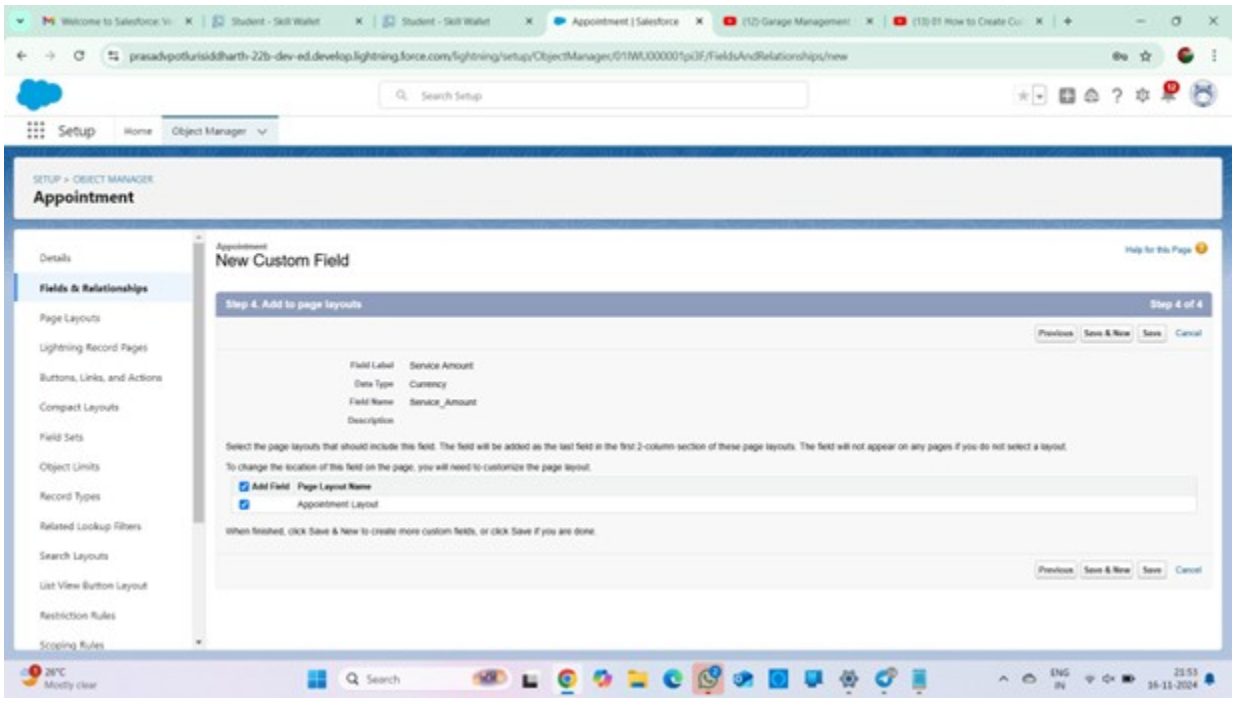
1. Go to setup >>click on Object Manager >>type object name(Appointment) in the search bar >> click on the object.
2. Nowclick on “Fields& Relationships” >>New.
3. Select “Date”as data type and click Next.
4. Give the Field Label : Appointment Date
5. Field Nme : is auto populated
6. Make it as a Required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



Creation of Currency Fields

Creation of Currency Field on Appointment Object :

1. Go to setup >> click on ObjectManager >> type object name(Appointment) in the search bar >> clickon 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 levelsecurity for profile.
8. Click on next > > save.



Creation of Currency Field on Billing details and feedback Object :

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

Creation of Text Fields

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

7. Make field as Required and Unique.

8. Click on next >>next >> save.

Creation of Text Fields in Billing details and feedback object :

1. Go to setup >> click on Object Manager >>type object name(Billing detailsand feedback) in searchbar >> click on the object.
2. Now click on “Fields& Relationships” >>New.
3. Select “text” as data type and click Next.
4. Give the Field Label : Rating for service
5. Field Name : is auto populated
6. Length : 1
7. Make field as Required and Unique.
8. Click on next >> next >> save

Creation of Picklist Fields

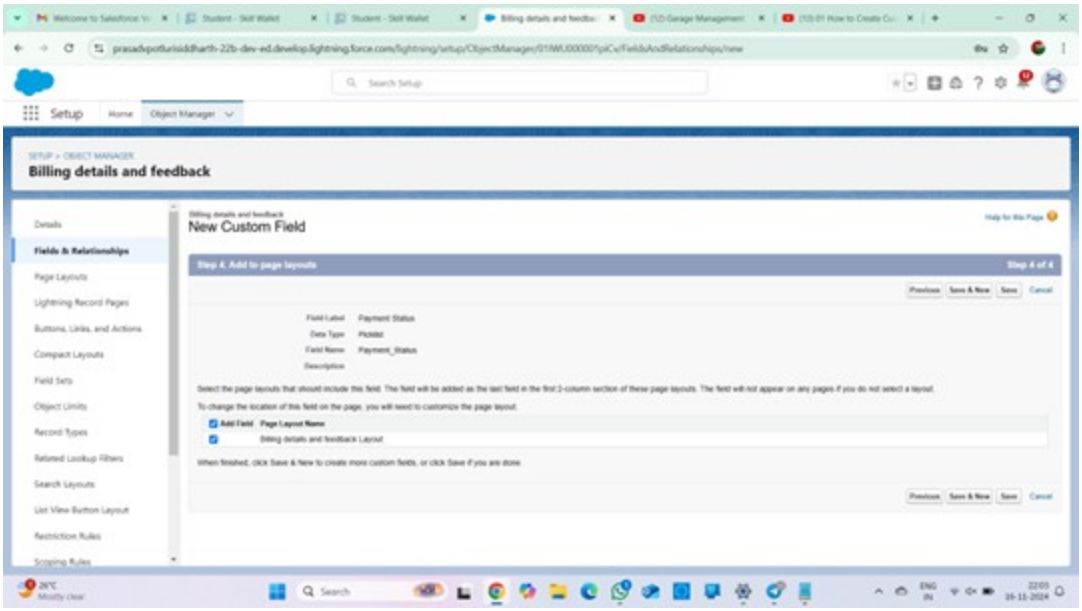
Creation of Picklist Fields in Service records object :

1. Go to setup >>click on ObjectManager >> type object name(Service records) in search bar >> click on the object.
2. Click on fields & relationship >>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 valueseparated by a new line" and enter valuesas shown below.
5. Thevalues are: Started,Completed.
6. Click Next.
7. Next >>Next >> Save.

Creation of Picklist Fields in Billingdetails and feedbackobject :

1. Go to setup >>click on ObjectManager >> type object name(Billing details and feedback) in search bar >> click on the object.
2. Clickon fields & relationship >>click on New.
3. Select Data type as “Picklist” and click Next.
4. Enter FieldLabel as “PaymentStatus”, under valuesselect “Enter values,with each valueseparated by a new line" and enter valuesas shown below.
5. The valuesare: Pending, Completed.
6. Click Next.

Next >>Next >> Save.



Creating Formula Field in Service recordsObject

1. Go to setup >>click on ObjectManager >> type object name(Service records) in searchbar >> clickon 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 “servicedate” and select formula returntype as “Date”and click next.

5. Insert field formula shouldbe : CreatedDate

6. click “CheckSyntax” .

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 errormessageand prevents the user from saving the record until the issues are resolved.

To createa validation rule to an Appointment Object

1. Go to the setup page >> click on objectmanager >> From drop down click edit for Appointment object.
2. Click on the validation rule >> clickNew.
3. Enter the Rule name as “ Vehicle ”.
4. Insert the ErrorCondition Formula as : -

1. NOT(REGEX(Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))

6. Enter the Error Messageas “Please enter vaild number ”, selectthe Error locationas Field and select the field as “Vehicle numberplate”, and clickSave.

To create a validation rule to an Service records Object

1. Go to the setup page >> click on objectmanager >> From drop down click edit for Servicerecords object.
2. Click on the validation rule >> clickNew.

3. Enter the Rule name as “ service_status_note ”.
4. Insert the ErrorCondition Formula as : -

```
NOT( ISPICKVAL(  Service_Status_c  , "Completed"))
```

Enter the Error Messageas “still it is pending”,select the Error location as Field and selectthe field as “Service status”,and click Save.

To createa validation rule to an Billing detailsandfeedback Object

1. Go to the setup page >> clickon object manager>> From drop down clickedit for Billingdetails and feedbackobject.
2. Click on the validation rule >> click New.
3. Enter the Rule name as “ rating_should_be_less_than_5”.
4. Insert the ErrorCondition Formula as : -

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

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

Duplicate rule

To create a matching rule to an Customerdetails Object

1. Go to quick find box in setup and search for matching Rule.
2. Click on matchingrule >> click on New Rule.
3. Select the object as Customerdetails and click Next.
4. Give the Rule name : Matchingcustomer details

5. Unique name : is auto populated
6. Define the matchingcriteria as
7. Field Matching Method
    a. Gmail Exact
    b. Phone Number Exact
8. Click save.
9. After Saving Click on Activate.

To createa Duplicate rule to anCustomer details Object

1. Go to quick find box in setup and search for Duplicate rules.
2. Click on Duplicate rule >> clickon New Rule >> selectcustomer details object.

3. Give the Rule name as : Customer Detailduplicate
4. Scroll a littlein Matching rule section
5. Select the matching rule : Matchingcustomer details
6. And Click on save.
7. After saving the Duplicate Rule, Click on Activate.

Profiles

A profileis a group/collection of settingsand permissions that define what a user can do insalesforce. Profile controls “Object permissions, Field permissions, User permissions, Tabsettings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Loginhours & Login IP ranges.You can define profiles by the user'sjob function. Forexample SystemAdministrator, Developer, SalesRepresentative.

Manager Profile

To create a new profile:

a. Goto setup >>type profiles in quick find box >>click on profiles>> clone the desired profile (Standard User) >> enter profile name (Manager) >>Save.

b. While still on the profile page, then click Edit.

c. Select the CustomApp settings as default for the Garagemanagement.

d. Scroll down to Custom Object Permissions and Give access permissions for Appointments,Billing detailsand feedback , service recordsand customer detailsobjects as mentionedin the below diagram.

e. Changing the sessiontimes out after should be " 8 hours of inactivity".

f. Change the passwordpolicies as mentioned :

g. User passwords expire in should be " never expires".

h. Minimum password lengthshould be " 8 ", and clicksave.

Sales person Profile

1. Goto 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 profilepage, then click Edit.
3. Select the Custom App settings as default for the GAragemanagement.
4. Scroll down to Custom Object Permissions and Give access permissions for Appointments,Billing detailsand feedback , servicerecords and customer details objects as mentioned in the below diagram.

5. And click save.

Role & Role Hierarchy

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

Creating Manager Role

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

b. Click on Expand All and click on add role under whom this role works.

c. Give Label as “Manager”and Role name gets auto populated. Thenclick on Save.

Creating another roles

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

b. Click plus on CEO role,and click add role undermanager.

c. Give Label as “salesperson” and Role name gets auto populated. Thenclick on Save.

Users

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

Create User

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

creating another users

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

Note : create atleast 3 userswith these permissions.

Public groups

Public groupsare a valuable tool for Salesforce administrators and developers to streamlineuser management, data access, and security settings. By creating and using public groupseffectively, you can maintain a secure and organized Salesforce environment while ensuringthat users have appropriate accessto 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 Labelas “sales team”.
3. Group name is autopopulated.
4. Search for Roles.
5. In Available Membersselect Sales personand click on add it will be moved to selected member.
6. Click on save.

Sharing Setting

Salesforce allowsyou to configure sharing settingsto control how records are accessed andshared withinyour organization. These settings are crucial for maintaining data security andprivacy. Salesforce provides a variety of tools and mechanisms to define and enforce sharingrules, such as:

Organization-Wide Default (OWD)Settings:

These settings define the default level of access for all objects within your Salesforce org.

OWD settingsinclude Private, Public Read-Only, Public Read/Write, and Controlled by

Parent.OWD settings can be configuredfor each standardand custom object.

Role Hierarchy:

Salesforce uses a role hierarchy to determine recordaccess.

Users at higher levelsin the hierarchy have greateraccess to recordsowned by or shared with users lower in the hierarchy.

The role hierarchy is often used in combination with OWD settingsto grant different levels ofaccess.

Profiles and Permission Sets:

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

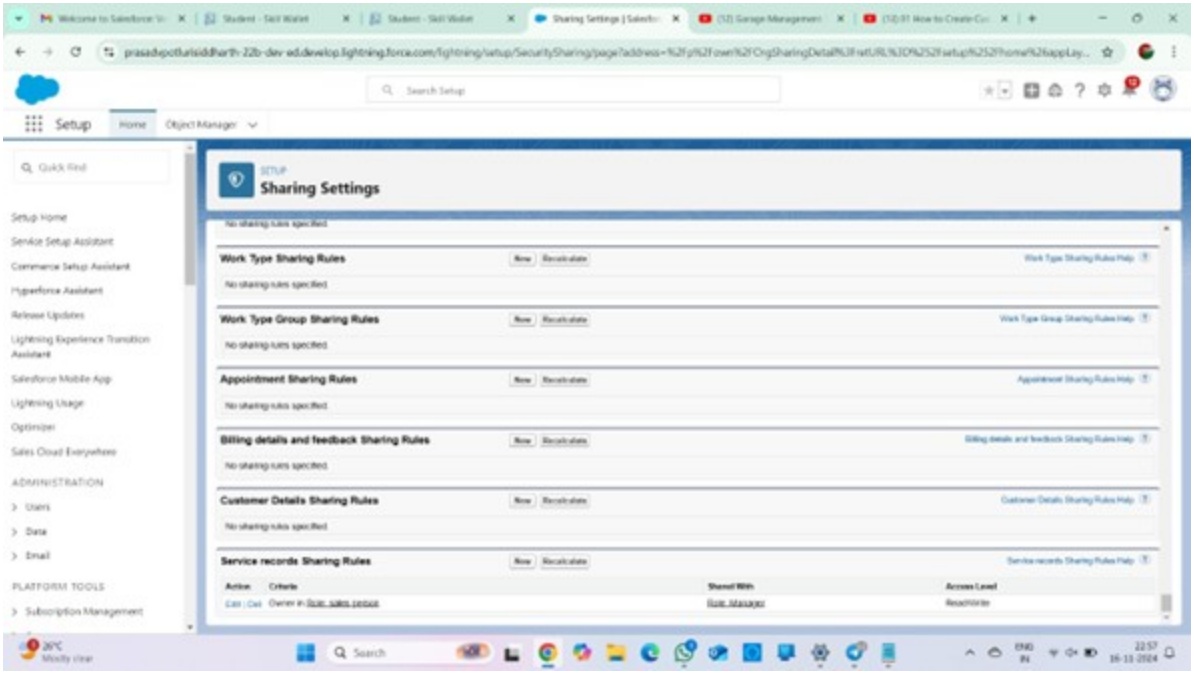
Profiles are typically used to grant general object and field access, while permission sets canbe used to extend those permissions to specific users.

Creating Sharing settings

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

7. In step 3 : Selectwhich records to be shared,members of “ Roles ” >> “ Sales person”
8. In step 4: share with, select “ Roles ” >> “ Manager ”
9. In step 5 : Change the access level to “ Read / write ”.

10. Click on save.



Flows

Create a Flow

1. Go to setup >> type Flow in quick find box >>Click on the Flow and Select the New Flow.
2. Select the Record-triggered flow and Click on Create.
3. Select the Objectas “Billing detailsand feedback”in the Drop down list.
4. Select the Trigger Flow when: “A record is Created or Updated”.

5. Select the Optimizethe flow for: “Actions and Related Records”and Click on Done.
6. Under the Record-triggered Flow Click on “+” Symboland In the Drop down List selectthe “Update recordsElement”.Give the Label Name : Amount Update
7. Api name : is auto populated
8. Set a filtercondition : All Conditions are met(AND)
9. Field : Payment_Status_c
10. Operator : Equals
11. Value : Completed
12. And Set FieldValues for the Billing detailsand feedback Record
13. Field : Payment_Paid_c
14. Value : {!$Record.Service_records_r.Appointment__r.Service_Amount__c}
15. Click On Done.Before creating another Element.Create a New Resource formToolbox form top left.
16. Click on the New Resource, And select Variable.
17. Select the resourcetype as text template.
18. Enter the API name as “ alert”.
19. Change the view as Rich Text ? View to Plain Text.
20. In body field paste the syntax that given below.

Dear {!$Record.Service_records_r.Appointment__r.Customer_Name__r.Name},

I hope this messagefinds you well. I wantedto take a moment to express my sinceregratitude for your recent payment for the services provided by our garage management team. Your prompt payment is greatly appreciated, and it helps us continueto provide top-notch services to you and all our valuedcustomers.

Amount paid : {!$Record.Payment_Paid_c}

Thank you for Coming .

1. Click done.
2. Now Click on Add Element, select Action.
3. Their action bar will be openedin that search for “ send email ” and click on it.
4. Give the label name as “ Email Alert”
5. API name will be auto populated.
6. Enable the body in set inputvalues for the selected action.

7. Select the text template that created , Body : {!alert}
8. Include recipient addresslist select the email form the record.
9. RecipientAddressList:
   {!$Record.Service_records_r.Appointment__r.Customer_Name__r.Gmail__c}
10. Includesubject as " Thank You for Your Payment - Garage Management".
11. Click done.
12. Click on save. Give the Flow label , Flow Api name will be autopopulated.
13. And click save,and click on activate.

Apex Trigger

Apex can be invokedby using triggers.Apex triggers enableyou to perform custom actionsbefore or after changes to Salesforce records,such as insertions, updates, or deletions.

A triggeris Apex code that executesbefore or after the following types of operations:

1. insert
2. update
3. delete
4. merge
5. upsert
6. undelete

For example,you can have a triggerrun before an object's recordsare 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 customobjects. 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:

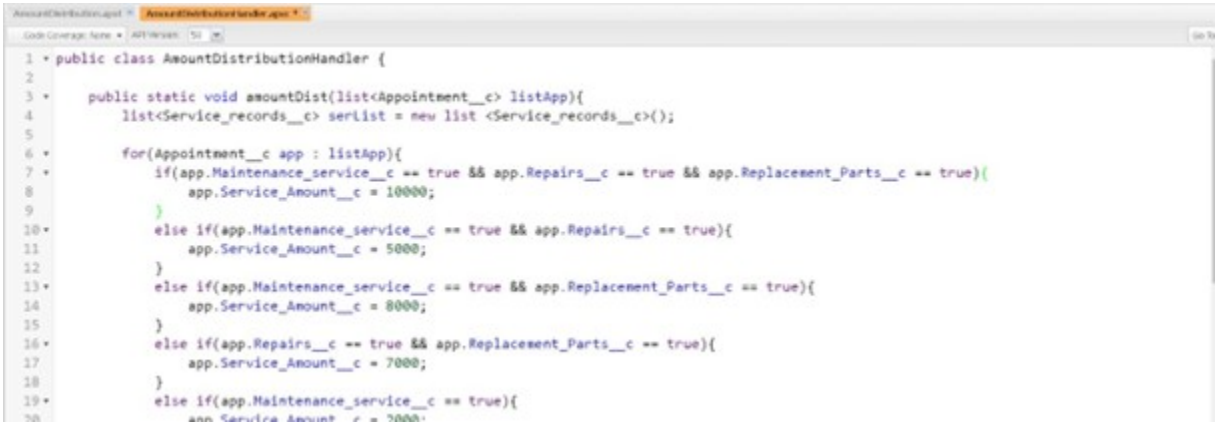
Before Trigger: This type of trigger in Salesforce is used either to update or validate the values of a record before they can be saved into the database. So, basically, the before triggervalidates the recordfirst and then saves it. Some criteriaor code can be set to checkdata before it gets ready to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

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

Apex handler

UseCase : This use case worksfor Amount Distribution for each Servicethe customerselectedfor there Vehicle.

1. Login to the respective trailheadaccount and navigateto 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. Clickon it and navigate to new and create New apex class.
4. Name the class as “AmountDistributionHandler ”.



```
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){
```

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.Repairsc == 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.Repairsc == 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 consoleand you will be navigatedto a new console window.
3. Click on File menu in the tool bar, and click on new? Trigger.
4. Enter the triggername and the object to be triggered.
5. Name : AmountDistribution
6. sObject : Appointment_c

Syntax For creating trigger :

The syntax for creatingtrigger is :

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

{

}

In this project , trigger is called whenneverthe particular recordssum exceed the threshold i.eminimum businessrequirement value. Then the code in the trigger will get executed.

Code:

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

Reports

Reports give you accessto your Salesforce data. You can examineyour Salesforce data inalmost infinite combinations, display it in easy-to-understand formats, and share theresulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

Types of Reports in Salesforce

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

create a report folder

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

Sharing a report folder

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

Create Report Type

1. Go to setup>> type users in quickfind box >>select Report Type >> clickon Continue.
2. Click on new custom report type.
3. Select the Primaryobject as “ Customer details”.
4. Give the Report type Label as “ Serviceinformation ”
5. Report type Name is autopopulated.
6. Keep the Description as same.
7. Select Store in Categoryas “ other Reports ”
8. Select the deployment status as “ Depolyed ”, click on Next.
9. now , Clickon Related objectbox.
10. Click on Select Object,choose Appointment Object as shown in fig
11. Again Click to relate anotherobject.
12. And select the relatedobject as “ service records”.
13. Repeat the processand select the related objectas “ Billing details and feedback”.
14. And click on sav

Create Report

Note : Before creatingreport, create latest“10” records in every

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

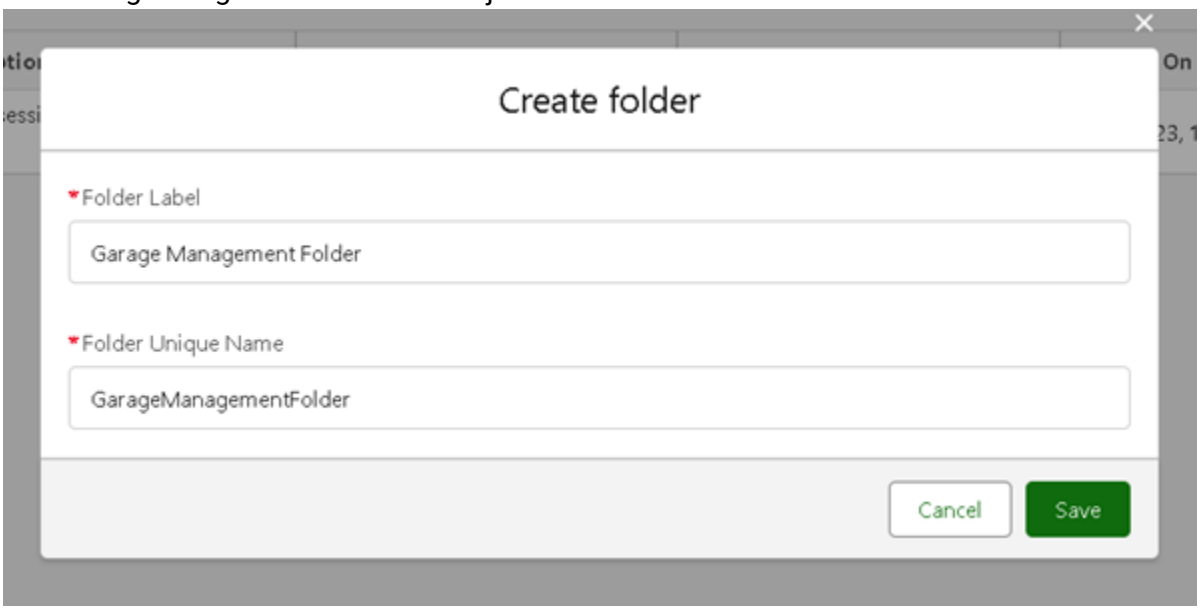
1. Go to the app >> click on the reports tab
2. Click New Report.
3. Select the Categoryas other reports,search for ServiceInformation, select that report, click on it. And click on start report.
4. Their outline pane is openedalredy, select the fields that mentioned belowin column section.
    a. Customer name
    b. Appointment Date
    c. Service Status
    d. Payment paid
    e. Remove the unnecessary fields.
    f. Select the fields that mentioned belowin GROUP ROWS section.
        i. Rating for Service
    g. Select the fields that mentioned belowin GROUP ROWS section.
        i. Payment Status
    h. Click on Add Chart , Select the Line Chart.
    i. Click on save, Give the reportName : New Service information Report
    j. Report unique Name is auto populated.
    k. Select the folder the created and Click on save.

Dashboards

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

Create Dashboard Folder

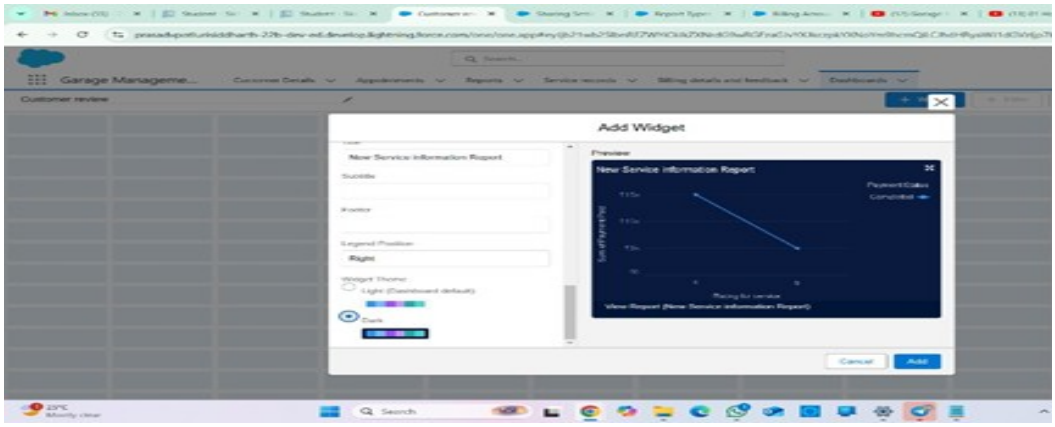
1. Click on the app launcher and search for dashboard.
2. Click on dashboard tab.
3. Click new folder, give the folderlabel as " Service Ratingdashboard".
4. Folder unique name will be auto populated.
5. Click save.
6. Follow the same steps, form milestone 15, and activity2, and provide the sharingsettings 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 Reportand 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 shownbelow.



Subcription:

1. After that Clickon Subcribe on top right.
2. Set the Frequency as “ weekly”.
3. Set a day as monday.
4. And Click on save.