

PROJECT TITLE:

Garage Management System

College Name:

Sri Vasavi College Self Finance Wing, Erode

College Code:

bru17

Team ID: NM2025TMID23326

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Garage Management System Project Documentation

1. Project Overview

The **Garage Management System (GMS)** is a Salesforce application designed to simplify and automate garage operations. It helps manage vehicles, customers, services, billing, and reporting on a single platform.

This system improves:

- Vehicle service tracking
- Customer management
- Billing and payments
- Workflow automation
- Report generation and analytics

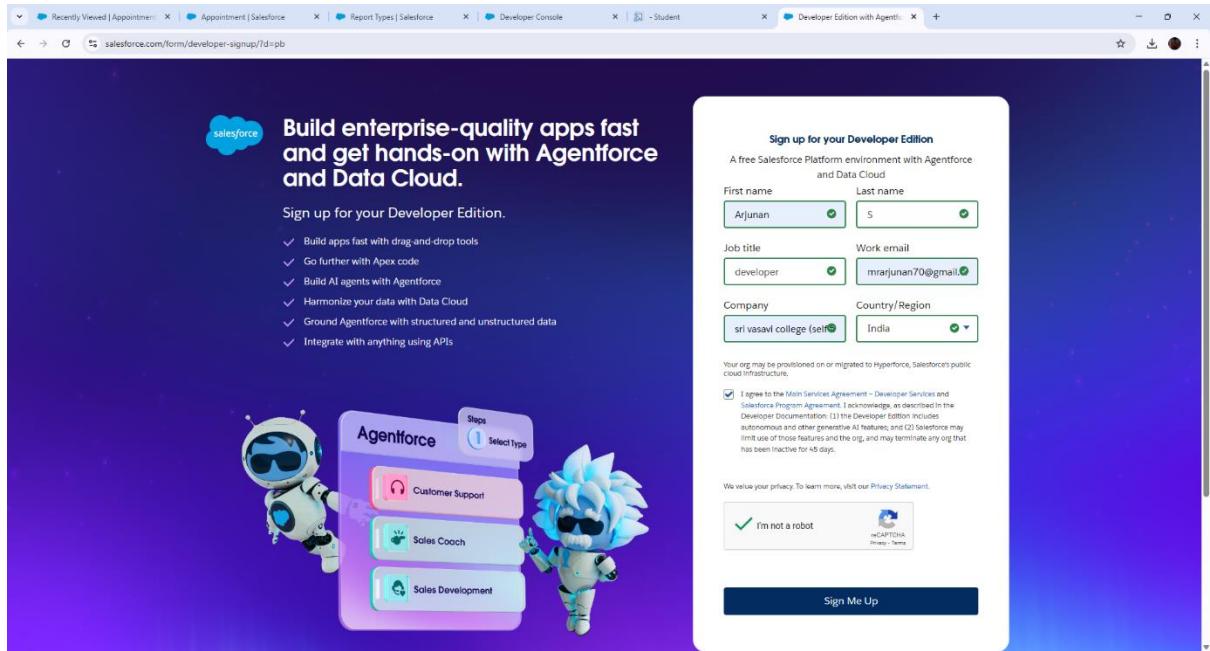
2. Objectives

The main objectives of this project are:

1. To efficiently manage vehicle services, customers, and billing in one system.
2. To automate routine garage operations for improved productivity.
3. To ensure accurate tracking of services, payments, and customer records.
4. To provide real-time reports and dashboards for better decision-making.
5. To enhance customer satisfaction by delivering faster and organized services.

3. Creating a developer org in salesforce.

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :

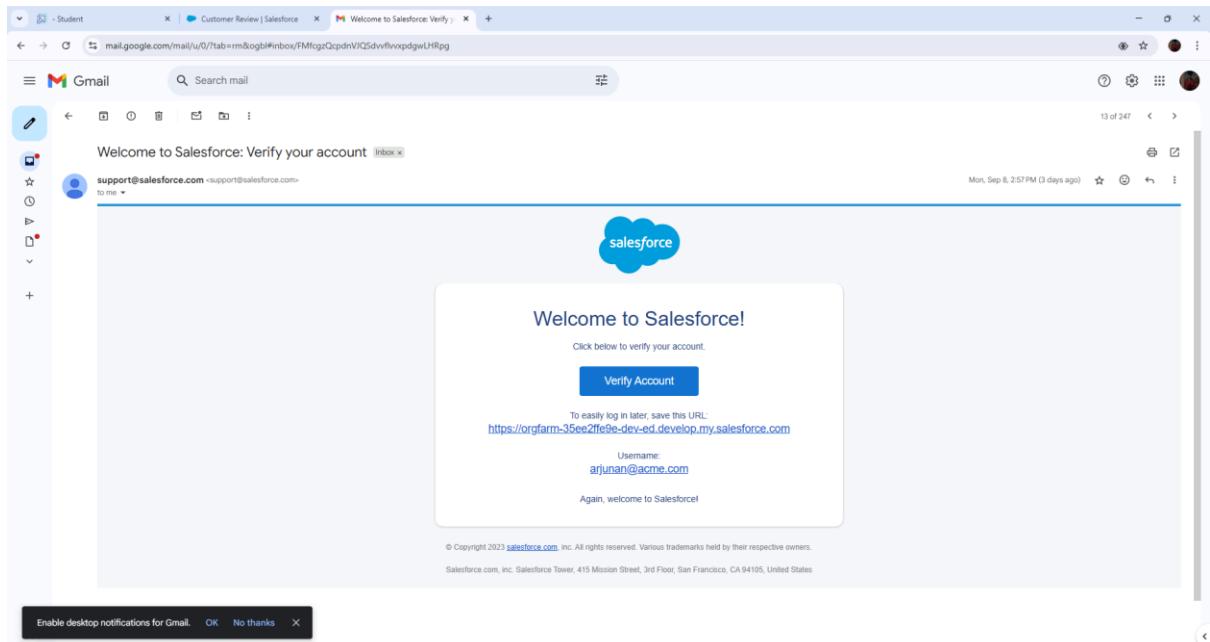


1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code

Click on sign me up after filling these

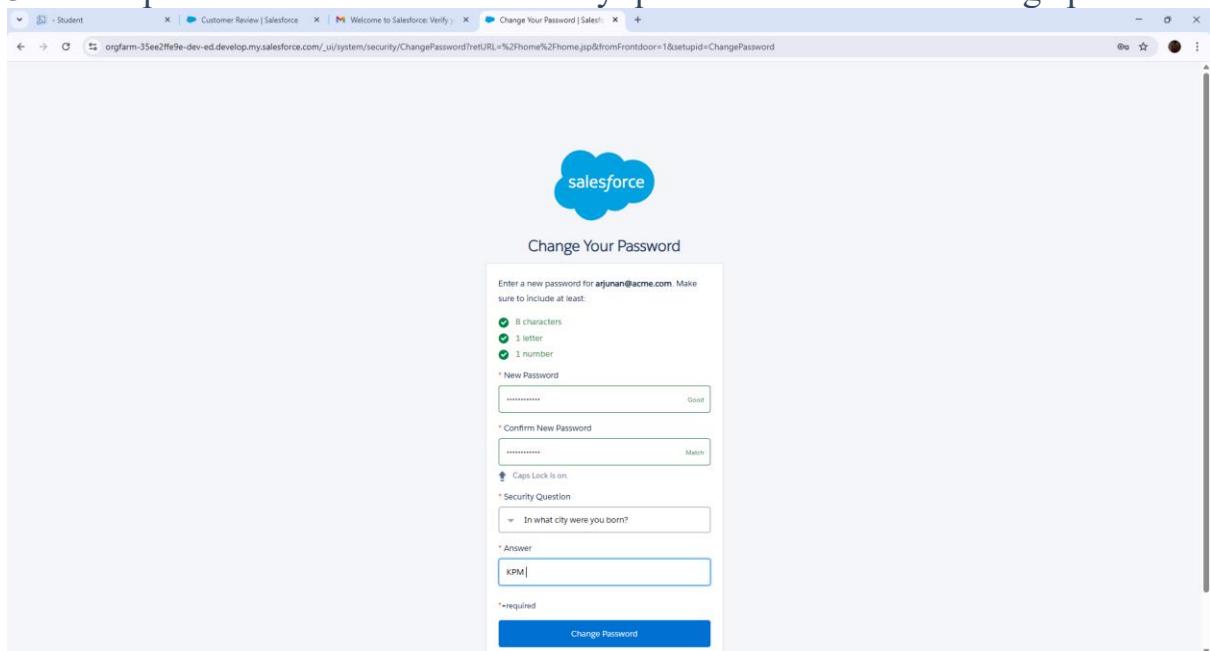
4.Account Activation

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



2. Click on Verify Account

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



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

5. Created Customer Details Object

To create an object:

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

LABEL	API NAME	TYPE	DESCRIPTION
Customer	Customer	Text	

The screenshot shows the 'New Custom Object' setup page. The object name is 'Customer Details'. Other fields include 'Plural Label' (Customer Details), 'Object Name' (Customer_Details), and 'Description' (empty). Under 'Content Name', the 'None' option is selected. In the 'Optional Features' section, 'Allow Reports' and 'Allow Activities' are checked. The 'Data Type' is set to 'Text'.

This screenshot shows the same 'New Custom Object' setup page as the first one, but with different optional features selected. 'Allow Reports' and 'Allow Activities' are checked, while 'Allow Bulk API Access' and 'Allow Streaming API Access' are also checked under 'Optional Features'.

In the same way Created Appointment, Service record , Billing details and feedback

Label	API Name	Type	Description	Last Modified	Deployed
Appointment	Appointment_c	Custom Object		9/7/2025	✓
Customer Details	Customer_Detail_c	Custom Object		9/6/2025	✓
Billing details and feedback	Billing_details_and_c	Custom Object		9/6/2025	✓
Service records	Service_records_c	Custom Object		9/6/2025	✓

6. Created a Custom Tab

To create a Tab:(Customer Details)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)

2. Select Object(Customer Details) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .
3. Make sure that the Append tab to users' existing personal customizations is checked.
4. Click save.

Action	Label	Tab Style	Description
Edit Del	Appointments	Building Block	
Edit Del	Billing details and feedback	Bell	
Edit Del	Customer Details	Bell	
Edit Del	Service records	Building Block	

Salesforce Setup - Tabs

New Custom Object Tab

Step 1. Enter the Details

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

Object: Customer Details

Tab Style: None

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

Description:

Next Cancel

Salesforce Setup - Tabs

Authenticated Website User

App Launcher (standard__AppLauncher)

Community (standard__Community)

Site.com (standard__Sites)

Salesforce Chatter (standard__Chatter)

Content (standard__Content)

Analytics Studio (standard__Insights)

Sales Console (standard__LightningSalesConsole)

Service Console (standard__LightningService)

Sales (standard__LightningSales)

Lightning Usage App (standard__LightningInstrumentation)

Digital Experiences (standard__SalesforceCMS)

Queue Management (standard__QueueManagement)

Data Manager (standard__DataManager)

Subscription Management (standard__RevenueCloudConsole)

Sales Cloud Mobile (standard__SalesCloudMobile)

Bolt Solutions (standard__LightningBolt)

Data Cloud (standard__DataCloud500)

Approvals (standard__Approvals)

My Service Journey (standard__MSJApp)

Salesforce Scheduler Setup (standard__LightningScheduler)

Automation (standard__FlowApp)

Garage Management Application (Garage_Management_Application)

Append tab to users' existing personal customizations

Previous Save Cancel

Now created the Tabs for the remaining Appointment, **Service records**

, **Billing details and feedback**

Objects

7. Created a Lightning App

To create a lightning app page:

1. Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App.
2. Fill the app name in app details as Garage Management Application >> Next >> (App option page) keep it as default >> Next >> (Utility Items) keep it as default >> Next.
3. To Add Navigation Items:
4. Select the items (Customer Details, Appointments, Service records, Billing details and feedback, Reports and Dashboards) from the search bar and move it using the arrow button >> Next.
5. To Add User Profiles:
6. Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.

Screenshot of the Salesforce Setup interface showing the App Manager. The page title is "Lightning Experience App Manager". It displays a list of 27 items, sorted by App Name, filtered by All appmenuitems - TabSet Type, App Type. The columns include App Name, Developer Name, Description, Last Modified Date, App Type, and Visible in UI. The "App Launcher" item is selected.

App Name	Developer Name	Description	Last Modified Date	App Type	Visible in UI...
1 All Tabs	AllTabset	Build CRM Analytics dashboards and apps	8/30/2025, 12:34 PM	Classic	✓
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	8/30/2025, 12:34 PM	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	8/30/2025, 12:34 PM	Classic	✓
4 Approvals	App Launcher	Approvals	8/30/2025, 12:34 PM	Lightning	✓
5 Automation	FlowsApp	Automate business processes and repetitive tasks.	8/30/2025, 12:42 PM	Lightning	✓
6 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	8/30/2025, 12:34 PM	Lightning	✓
7 Community	Community	Salesforce CRM Communities	8/30/2025, 12:34 PM	Classic	✓
8 Content	Content	Salesforce CRM Content	8/30/2025, 12:34 PM	Classic	✓
9 Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	8/30/2025, 12:34 PM	Lightning	✓
10 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	8/30/2025, 12:34 PM	Lightning	✓
11 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	8/30/2025, 12:34 PM	Lightning	✓
12 Garage Management Application	Garage_Management_Application	(Lightning Experience) Lets sales reps work with multiple records on one screen	9/6/2025, 11:39 AM	Lightning	✓
13 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	8/30/2025, 12:34 PM	Lightning	✓
14 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	8/30/2025, 12:34 PM	Classic	✓
15 My Service Journey	MSIApp	Discover new customer service capabilities.	8/30/2025, 12:34 PM	Lightning	✓
16 Platform	Platform	The fundamental Lightning Platform	8/30/2025, 12:34 PM	Classic	✓
17 Queue Management	QueueManagement	Create and manage queues for your business.	8/30/2025, 12:34 PM	Lightning	✓
18 Sales	Sales	The world's most popular sales force automation (SFA) solution	8/30/2025, 12:34 PM	Classic	✓
19 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	8/30/2025, 12:34 PM	Lightning	✓
20 Sales Cloud Mobile	SalesCloudMobile	New seller focused mobile first experience	8/30/2025, 12:34 PM	Lightning	✓
21 Editor Controls	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one screen	8/30/2025, 12:34 PM	Lightning	✓

App Details & Branding

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

App Details

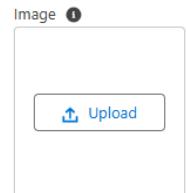
* App Name i

* Developer Name i

Description i

Enter a description...

App Branding



Primary Color Hex Value i

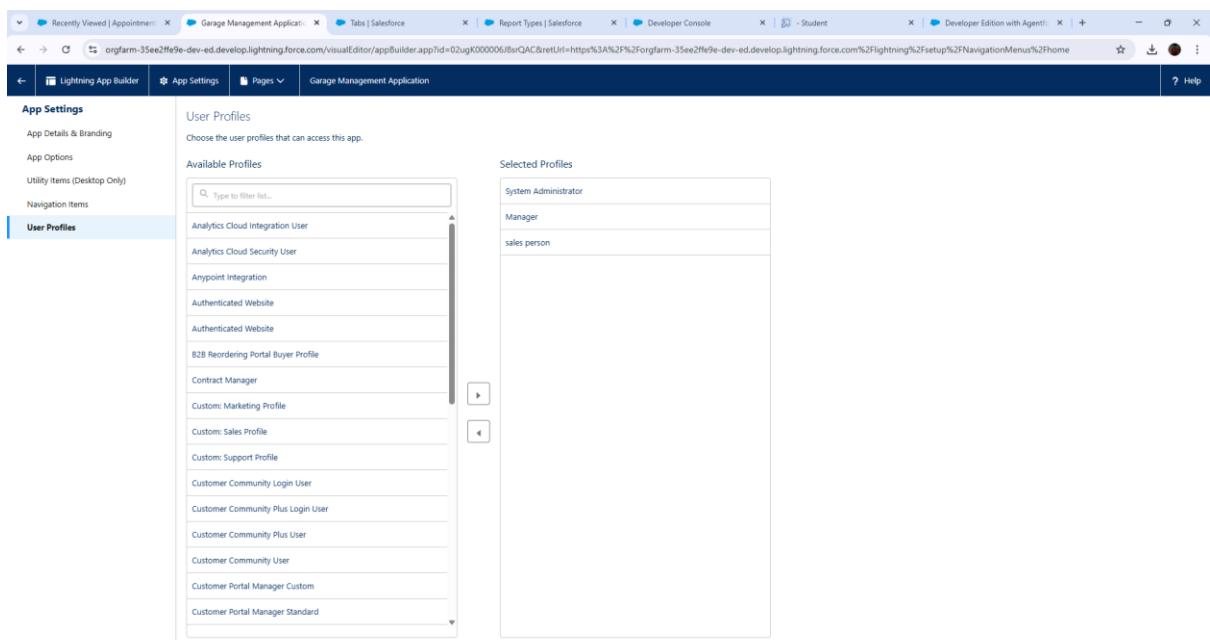
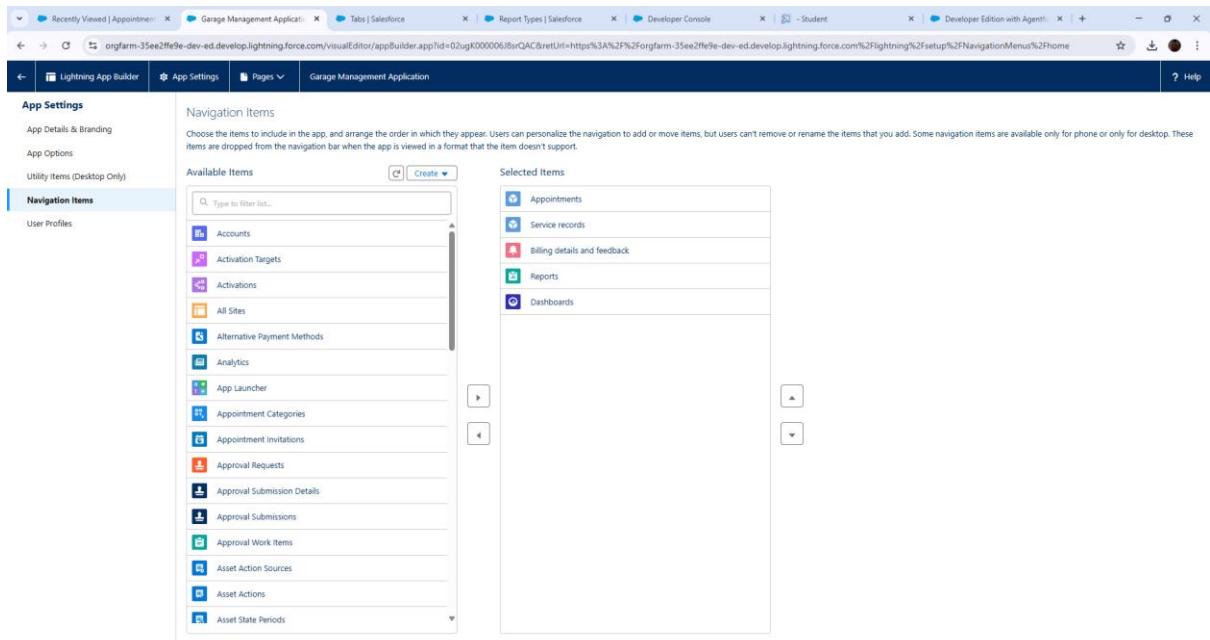
#0070D2

Org Theme Options

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

App Launcher Preview





8. Created a fields for the Customer Details object

1. To create fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Customer Details) in search bar >> click on the object.

Object Manager					
Label	API Name	Type	Description	Last Modified	Deployed
Customer Details	Customer_Detail_c	Custom Object		9/6/2025	✓

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

Customer Details					
Fields & Relationships					
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED	
Created By	CreatedById	Lookup(User)			
Currency	CurrencyIsoCode	Picklist			
Customer Detail 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			

3. Select Data Type as a “Phone”

4. Click on next.

5. Fill the Above as following:

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

The screenshot shows the Salesforce Setup interface under 'Object Manager'. A new custom field is being created for the 'Customer' object. The 'Fields & Relationships' section is active. Under 'Relationships', the 'Phone' field type is selected. The right pane displays detailed information about the 'Phone' field type, including its description: 'Allows users to enter any phone number. Automatically formats it as a phone number.' and its usage: 'Allows users to select a value from a list you define.'

The screenshot shows the 'Customer Details New Custom Field' configuration screen. Step 2 of 4 is selected. The field details are as follows:

- Field Label:** Phone number
- Field Name:** Phone_number
- Description:** (empty)
- Help Text:** (empty)
- Required:** Always require a value in this field to save a record
- Auto add to custom report type:** Add this field to existing custom report types
- Default Value:** Show Formula Editor (disabled)

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

Object	Field Label	Data Type	Details / Notes
Customer Details	Phone Number	Phone	Auto-generated Field Name
	Gmail	Email	Auto-generated Field Name

Object	Field Label	Data Type	Details / Notes
Appointment	<i>Other fields as required</i>	<i>Various Types</i>	Follow same steps for creating additional fields
	Maintenance Service	Checkbox	Default Value: Unchecked
	Repairs	Checkbox	Default Value: Unchecked
	Replacement Parts	Checkbox	Default Value: Unchecked
	Appointment Date	Date	Required Field
	Service Amount	Currency	Read-Only for all profiles
Service Records	Vehicle Number Plate	Text (Length: 10)	Required & Unique
	Customer (Lookup)	Lookup (Customer Details)	Links Appointment to Customer Details
	Quality Check Status	Checkbox	Default Value: Unchecked
	Service Status	Picklist	Values: Started, Completed
Billing Details & Feedback	Appointment (Lookup)	Lookup (Appointment)	Required Field with Filter: <i>Appointment Date < Created Date</i>
	Service Date	Formula (Return Type: Date)	Formula: CreatedDate
	Payment Paid	Currency	Auto-generated Field Name

Object	Field Label	Data Type	Details / Notes
	Rating for Service	Text (Length: 1)	Required Field
	Payment Status	Picklist	Values: Pending, Completed
	Service Record (Lookup)	Lookup (Service Records)	Links Billing to Service Records

created 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 : -

$$\text{NOT(REGEX(Vehicle_number_plate_c , "[A-Z]\{2\}[0-9]\{2\}[A-Z]\{2\}[0-9]\{4\}"))}$$
5. Enter the Error Message as “Please enter valid number ”, select the Error location as Field and select the field as “Vehicle number plate”, and click Save.

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

- Tab Bar:** Recently Viewed | Appointment, Tabs | Salesforce, Student, Appointment | Salesforce.
- Header:** Search Setup.
- Left Sidebar:** 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 Rule, Scoping Rules, Object Access, Triggers, Flow Triggers, Conditional Field Formatting.
- Current Page:** Validation Rules for the Appointment object.
- Table:**| RULE NAME | ERROR LOCATION | ERROR MESSAGE | ACTIVE | MODIFIED BY |
| --- | --- | --- | --- | --- |
| Vehicle | Vehicle number plate | Please enter valid number | ✓ | Ajrunan S 9/9/2025, 11:36 AM |

The screenshot shows the 'Appointment Validation Rule' edit screen with the following details:

- Title:** Appointment Validation Rule
- Form Fields:**
 - Validation Rule Edit
 - Rule Name: Vehicle
 - Active:
 - Description: (empty)
 - Save, Save & New, Cancel buttons.
- Error Condition Formula:**
 - Example: Discount_Percent__c>30, More Examples...
 - Display an error if Discount is more than 30%
 - If this formula expression is true, display the text defined in the Error Message area.
 - Formula Editor: `REGEX(Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}")`
 - Functions dropdown: ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, Insert Selected Function, ABS(number) - Returns the absolute value of a number, a number without its sign.
- Error Message:**
 - Example: Discount percent cannot exceed 30%.
 - This message will appear when Error Condition formula is true.
 - Error Message: Please enter valid number.
 - Check Syntax button.
 - Error Location: Top of Page, Field: Vehicle number plate.

9. created a validation rule to an Billing details and feedback Object

SETUP > OBJECT MANAGER
Billing details and feedback

Validation Rules
1 items. Sorted by Rule Name

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	✓	Ajrunan s, 9/8/2023, 1:16 AM

Validation Rule Edit

Rule Name: rating_should_be_less_than_5

Active:

Description:

Error Condition Formula

Example: `Discount_Percent__c>0.30` [More Examples...](#)

Display an error if Discount is more than 30%

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

Insert Field

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

Functions

-- All Function Categories --

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

ABS(number)
Returns the absolute value of a number, a number without its sign
[Help on this function](#)

Error Message

Example: `Discount percent cannot exceed 30%`

This message will appear when Error Condition formula is true

Error Message: rating should be from 1 to 5

10.1 created 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

8. Gmail Exact

9. Phone Number Exact

10. Click save.

11. After Saving Click on Activate.

The screenshot shows the Salesforce Matching Rules page. The URL is <https://orgfarm-35ee2fe9e-dev-ed.lightning.force.com/lightning/setup/MatchingRules/home>. The page title is "Matching Rules". On the left, there's a sidebar with "Data" and "Duplicate Management" sections, and "Matching Rules" is selected. The main content area has a heading "All Matching Rules" and a sub-section "What Are Matching Rules?". Below that is a table with columns: Action, Rule Name, Object, Status, Description, Last Modified Date, and Last Modified By. The table contains four rows:

Action	Rule Name	Object	Status	Description	Last Modified Date	Last Modified By
Deactivate	Matching customer details	Customer Details	Active		9/9/2025	ERIC
Deactivate	Standard Account Matching Rule	Account	Active	Matching rule for account records. More info	9/9/2025	ERIC
Deactivate	Standard Contact Matching Rule	Contact	Active	Matching rule for contact records. More info	9/9/2025	ERIC
Deactivate	Standard Lead Matching Rule	Lead	Active	Matching rule for lead records. More info	9/9/2025	ERIC

The screenshot shows the "New Matching Rule" setup page, Step 1 of 2. The URL is <https://orgfarm-35ee2fe9e-dev-ed.lightning.force.com/lightning/setup/MatchingRules/new>. The title is "Matching Rule" and the sub-section is "New Matching Rule". The page has a header "Step 1: Select object" and "Step 1 of 2". It includes a "Help for this Page" link and "Next" and "Cancel" buttons. A note says "Select the object to which this matching rule applies." Below is a dropdown menu labeled "Object" with "Customer Details" selected. At the bottom are "Next" and "Cancel" buttons.

Edit Rule Matching customer details

Step 2: Configure Matching Rule

Rule Details

Object	Customer Details
Rule Name	Matching customer details
Unique Name	Matching_customer_details
Description	(Empty)

Matching Criteria

Tell the rule which fields to compare and how.

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

Add Filter Logic...

Previous Save Cancel

Matching Rule

Matching customer details

Help for this Page

Matching Rule Detail

Object	Customer Details
Rule Name	Matching customer details
Unique Name	Matching_customer_details
Description	(Empty)
Matching Criteria	(Customer Details: Gmail EXACT MatchBlank = FALSE) AND (Customer Details: Phone_number EXACT MatchBlank = FALSE)
Status	Inactive
Created By	Arunan S 9/8/2025, 1:20 AM
Modified By	Arunan S 9/9/2025, 1:04 PM

Activate

Edit Delete Clone Activate

Modified By Arunan S 9/9/2025, 1:04 PM

10.2 Created 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.

Setup Home Object Manager

Q_duplicat

DUPLEX Duplicate Rules

All Duplicate Rules

What Are Duplicate Rules?

View: [All Duplicate Rules]

Help for this Page

Did you find what you're looking for?
Try using Global Search.

Rule Name	Description	New Rule	Matching Rule	Active	Last Modified By	Last Modified Date
Customer Detail duplicate	Identify accounts that duplicate other accounts.	Account	Standard Account Matching Rule	<input checked="" type="checkbox"/>	OEPIC	9/8/2025
Standard Account Duplicate Rule	Identify contacts that duplicate other contacts and leads.	Address	Standard Lead Matching Rule	<input checked="" type="checkbox"/>	OEPIC	8/30/2025
Standard Contact Duplicate Rule	Identify leads that duplicate other leads and contacts.	Appointment	Standard Contact Matching Rule	<input checked="" type="checkbox"/>	OEPIC	8/30/2025
Standard Lead Duplicate Rule	(Empty)	Billing details and feedback	Standard Lead Matching Rule	<input checked="" type="checkbox"/>	OEPIC	8/30/2025
		Comments	Standard Contact Matching Rule	<input checked="" type="checkbox"/>	OEPIC	8/30/2025
		Customer Details				
		Individual				
		Lead				
		Service records				

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Customer Detail duplicate

Duplicate Rule Edit

Rule Details

- Rule Name: Customer Detail duplicate
- Description:
- Object: Customer Details
- Record-Level Security:
 - Enforce sharing rules
 - Bypass sharing rules

Actions

Specify what happens when a user tries to save a duplicate record.

Action On Create	Allow <input checked="" type="checkbox"/>	Alert <input checked="" type="checkbox"/>	Report <input type="checkbox"/>
Action On Edit	Allow <input checked="" type="checkbox"/>	Alert <input type="checkbox"/>	Report <input type="checkbox"/>
Alert Text	Use one of these records?		

Matching Rules

Define how duplicate records are identified.

Compare Customer Details With	Customer Details
Matching Rule	-Select a Matching Rule-
Matching Criteria	Select a rule to see criteria
Field Mapping	

Add Rule | Remove Rule

Conditions

Optionally, specify the conditions a record must meet for the rule to run.

Field	Operator	Value	AND
-None--	-None--		AND

Add Filter Logic... | Save | Save & New | Cancel |

11.Created 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 with the following details:

- Header:** Search bar with placeholder "Search Setup".
- Left Navigation Bar:** Includes "Setup", "Home", "Object Manager", and a "pro" user icon.
- Current Page:** "Profiles" under the "Users" section of the Setup menu.
- Page Content:**
 - Section Header:** "Profiles".
 - Sub-Header:** "All Profiles" with options to "Edit" or "Delete" and "Create New View".
 - Table:** A list of profiles with columns: "Action", "Profile Name", "User License", and "Custom".

Action	Profile Name	User License	Custom
<input type="checkbox"/> Edit Delete	sales	Salesforce	✓
<input type="checkbox"/> Edit Delete	sales0000	Salesforce Platform	✓
<input type="checkbox"/> Edit Delete	Salesforce API Only System Integrations	Salesforce Integration	✓
<input type="checkbox"/> Edit Clone	Silver Partner User	Silver Partner	□
<input type="checkbox"/> Edit Clone	Solution Manager	Salesforce	□
<input type="checkbox"/> Edit Clone	Standard Platform User	Salesforce Platform	□
<input type="checkbox"/> Edit Clone	Standard User	Salesforce	□
<input type="checkbox"/> Edit Clone	System Administrator	Salesforce	□
- Help:** "Help for this Page" and a "Feedback" button.



The screenshot shows the Salesforce Setup interface under the 'Profiles' tab. A modal window titled 'Clone Profile' is open, prompting the user to enter a name for the new profile and select an existing profile to clone from. The 'Manager' profile is selected as the source for cloning.

Existing Profile	Standard User
User License	Salesforce
Profile Name	Manager

Search Setup

prof

Users

Profiles

Profile Manager

Help for this Page

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

Log IP Reasons | Enabled Apex Class Access | Enabled Visualforce Page Access | Enabled External Data Source Access | Enabled Named Credential Access | Enabled External Credential Personal Access | Enabled Custom Metadata Type Access | Enabled Custom Setting Definitions Access | Enabled Custom Permissions | Enabled Service Worker Data Access | Enabled Custom Permissions

Profile Detail	
Name	Manager
User License	Salesforce
Description	
Created By	Anilana S. 9/9/2025, 1:15 PM
Modified By	Anilana S. 9/9/2025, 1:15 PM
Custom Profile	<input checked="" type="checkbox"/>

Page Layouts

Standard Object Layouts	Global	Location Group Assignment	Location Group Assignment Layout
Global	Global Layout	[View Assignment]	[View Assignment]
Email Application	Not Assigned	[View Assignment]	[View Assignment]
Home Page Layout	Home Page Default	[View Assignment]	[View Assignment]
Account	Account Layout	[View Assignment]	[View Assignment]
Alternative Payment Method	Alternative Payment Method Layout	[View Assignment]	[View Assignment]
Appointment Invitation	Appointment Invitation Layout	[View Assignment]	[View Assignment]
Asset	Asset Layout	[View Assignment]	[View Assignment]

11.1 Created a sales person Profile

The screenshot shows the Salesforce Setup interface. On the left, the navigation bar includes 'Setup', 'Home', and 'Object Manager'. Under 'Users', 'Profiles' is selected. A search bar at the top right says 'Search Setup'.

Clone Profile

You must select an existing profile to clone from.

Existing Profile	Standard User
User License	Salesforce
Profile Name	<input type="text" value="sales person"/>

Profile Detail

Profile: sales person

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

Page Layouts

Standard Object Layouts	Global	Lead
Email Application	Not Assigned	Lead Layout [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Location Layout [View Assignment]
Account	Account Layout [View Assignment]	Location Group Layout [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Location Group Assignment Layout [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Object Milestone Layout [View Assignment]
Asset	Asset Layout [View Assignment]	Operating Hours [View Assignment]
Asset Relationship	Asset Relationship Layout [View Assignment]	Order [View Assignment]
Assigned Resource	Assigned Resource Layout [View Assignment]	Order Product Layout [View Assignment]
Associated Location	Associated Location Layout [View Assignment]	Payment [View Assignment]
Async Operation Log	Async Operation Log Layout [View Assignment]	Payment Authorization [View Assignment]
Authorization Form	Authorization Form Layout [View Assignment]	Payment Authorization Adjustment [View Assignment]
Authorization Form Consent	Authorization Form Consent Layout [View Assignment]	Payment Gateway [View Assignment]
		Payment Gateway Log [View Assignment]

Custom Object Permissions

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

12. Created Manager Role

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.

The screenshot shows the Salesforce Setup Roles page. On the left, there's a sidebar with navigation links like 'Setup', 'Home', and 'Object Manager'. The main content area has a title 'Understanding Roles' with a sub-section 'Sample Role Hierarchy'. It displays a hierarchical tree diagram:

```

graph TD
    CEO[CEO President] --> WesternSalesDir[Western Sales Director]
    CEO --> EasternSalesDir[Eastern Sales Director]
    CEO --> InternationalSalesDir[International Sales Director]
    WesternSalesDir --> WesternSalesRep1[Western Sales Rep]
    WesternSalesDir --> WesternSalesRep2[Western Sales Rep]
    EasternSalesDir --> EasternSalesRep1[Eastern Sales Rep]
    EasternSalesDir --> EasternSalesRep2[Eastern Sales Rep]
    InternationalSalesDir --> InternationalSalesRep1[International Sales Rep]
    InternationalSalesDir --> InternationalSalesRep2[International Sales Rep]
  
```

Annotations explain the permissions for each level:

- Executive Staff**: View & edit data, roll up forecasts, & generate reports for all users below this level.
- President**: View & edit data, roll up forecasts, & generate reports for all users below this level.
- CFO, VP, Sales**: View & edit data, roll up forecasts, & generate reports for all users below this level.
- Western Sales Director**: View & edit data, roll up forecasts, & generate reports for all users directly under this level.
- Eastern Sales Director**: View & edit data, roll up forecasts, & generate reports for all users directly under this level.
- International Sales Director**: View & edit data, roll up forecasts, & generate reports only for own data or data of users above or at same level.
- Western Sales Rep**: View & edit data, roll up forecasts, & generate reports only for own data or data of users above or at same level.
- Eastern Sales Rep**: View & edit data, roll up forecasts, & generate reports only for own data or data of users above or at same level.
- International Sales Rep**: View & edit data, roll up forecasts, & generate reports only for own data or data of users above or at same level.

At the bottom right are 'Set Up Roles' and 'Don't show this page again' buttons.

This screenshot shows the 'Your Organization's Role Hierarchy' section. It lists various roles under different departments:

- sri vasavi college self finance wing**
 - CEO**
 - CFO**
 - COO**
 - Manager**
 - sales person**
 - SVP, Customer Service & Support**
 - Customer Support, International**
 - Customer Support, North America**
 - Installation & Repair Services**
 - SVP, Human Resources**
 - SVP, Sales & Marketing**
 - VP, International Sales**
 - VP, Marketing**
 - Marketing Team**
 - VP, North American Sales**

Each role item includes 'Edit | Del | Assign' buttons. A 'Show in tree view' button is located at the top right of the tree area.

This screenshot shows the 'Role Edit' screen for creating a new role. The 'New Role' tab is selected. The 'Role Edit' section contains the following fields:

- Label**: Manager
- Role Name**: Manager
- This role reports to**: CEO
- Role Name as displayed on reports**: (empty field)

At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

12.1.Created another roles

Creating another roles under manager

1. Go to quick find >> Search for Roles >> click on set up roles.
2. Click plus on CEO role, and click add role under manager.
3. Give Label as “sales person” and Role name gets auto populated. Then click on Save.

The screenshot shows the 'Roles' section of the Salesforce Setup. At the top, there's a 'Help for this Page' link and a 'Show in tree view' dropdown. The main area displays a hierarchical tree of roles. The root node is 'sri vasavi college self finance wing'. Under it, there are several levels of roles, such as 'CEO', 'COO', 'Manager', 'Salesperson', and various 'SVP' and 'Customer Support' roles. Each node has 'Edit', 'Del', and 'Assign' buttons.

13. Created User

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

The screenshot shows the 'User Edit' page. At the top, there are 'Save', 'Save & New', and 'Cancel' buttons. Below that is a 'General Information' section with fields for First Name, Last Name, Alias, Email, Username, Nickname, Title, Company, Department, and Division. To the right of these fields is a 'Required Information' section containing a 'Role' dropdown set to 'Manager', a 'User License' dropdown set to 'Salesforce', a 'Profile' dropdown set to 'Sales', and an 'Active' checkbox which is checked. There are also other checkboxes for Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, and Site.com Publisher User.

13.1.Created another users

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

Note : created 3 users with these permissions.

The screenshot shows the Salesforce Setup interface under the 'Users' section. A user named 'arker' is selected, indicated by a blue border around their row. The 'Edit' button for this user is highlighted with a yellow box.

14.Created a 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 auto populated.
4. Search for Roles.
5. In Available Members select Sales person and click on add it will be moved to selected member.
6. Click on save.

The screenshot shows the Salesforce Setup interface under the 'Public Groups' section. A new group is being created with the following details:

- Label:** Sales Team
- Group Name:** Sales_Team
- Grant Access Using Hierarchies:** Checked
- Available Members:** Role: Customer Support, North America; Role: Director, Channel Sales; Role: Director, Direct Sales; Role: Eastern Sales Team; Role: Installation & Repair Services; Role: Manager; Role: Marketing Team; Role: SVP, Customer Service & Support; Role: SVP, Human Resources; Role: SVP, Sales & Marketing; Role: VP, International Sales; Role: VP, Marketing; Role: VP, North American Sales; Role: Western Sales Team
- Selected Members:** Role: Sales person

15.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.

6. Give the Label name as “ Sharing setting”

7. Rule name is auto populated.

8. In step 3 : Select which records to be shared, members of “ Roles ” >> “ Sales person”

9. In step 4: share with, select “ Roles ” >> “ Manager ”

10.In step 5 : Change the access level to “ Read / write ”.

11.Click on save.

Object	Action	Criteria	Shared With	Access Level
Service Appointment			Manager	Read / write
Service Appointment Attendee			Manager	Read / write
Service Contract			Manager	Read / write
Service Resource			Manager	Read / write
Service Territory			Manager	Read / write
Shift			Manager	Read / write
Shipment			Manager	Read / write
Shipping Carrier			Manager	Read / write
Shipping Carrier Method			Manager	Read / write
Shipping Configuration Set			Manager	Read / write
Streaming Channel			Manager	Read / write
Tableau Host Mapping			Manager	Read / write
User Presence			Manager	Read / write
Walllist			Manager	Read / write
Web Cart Document			Manager	Read / write
Work Order			Manager	Read / write
Work Plan			Manager	Read / write
Work Plan Template			Manager	Read / write
Work Step Template			Manager	Read / write
Work Type			Manager	Read / write
Work Type Group			Manager	Read / write
Appointment			Manager	Read / write
Billing details and feedback			Manager	Read / write
Customer Details			Manager	Read / write
Service records			Manager	Read / write

16.Created 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.
23. Dear
 {!\$Record.Service_records__r.Appointment__r.Customer_Name__r.Name},
24. 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.
25. Amount paid : {!\$Record.Payment_Paid__c}
26. Thank you for Coming .
27. Click done.
28. Now Click on Add Element , select Action.
29. Their action bar will be opened in that search for “ send email ” and click on it.
30. Give the label name as “ Email Alert”
31. API name will be auto populated.
32. Enable the body in set input values for the selected action.
33. Select the text template that created , Body : {!alert}

34. Include recipient address list select the email form the record.

35. RecipientAddressList:

```
{!$Record.Service_records__r.Appointment__r.Customer_Name__r.Gmail__c}
```

36. Include subject as “ Thank You for Your Payment - Garage Management”.

37. Click done.

38. Click on save. Give the Flow label , Flow Api name will be autopopulated.

39. And click save, and click on activate.

The screenshot shows the Salesforce Setup interface with the 'Flows' tab selected. The top navigation bar includes 'Setup', 'Home', 'Object Manager', and a search bar. Below the navigation is a sidebar with 'Q. flows' and sections for 'Process Automation' (Flow), 'Identity', and 'Login Flows'. A message says 'Didn't find what you're looking for? Try using Global Search.' The main area displays a table of 'Flow Definitions' with columns: Flow Label, Process Type, Active, Template, Package State, Package Name, Last Modified By, and Last Modified Date. The table lists several flows, including 'Add or Modify Service Appointment Attendees' (Salesforce Scheduler Flow), 'Approvals Workflow: Evaluate Approval Requests' (Screen Flow), 'Approvals Workflow: Process Approval Submission' (Screen Flow), 'Authentication Provider User Registration' (Identity User Registration Flow), and 'Basic Approval Request' (Flow Orchestration for CMS). The flow 'Basic Approval Request' is highlighted with a blue border. Below this is the 'New Automation' wizard, titled 'New Automation'. It has sections for 'Get Started with Automations' (Categories: Triggered, Scheduled, Screen, Autolaunched) and 'Frequently Used' (Record-Triggered Flow, Screen Flow, Schedule-Triggered Flow, Autolaunched Flow (No Trigger)). At the bottom, there's a 'Select Object' section where 'Billing details and feedback' is selected, and a 'Configure Trigger' section with a 'Trigger the Flow When:' section containing radio buttons for 'A record is created', 'A record is updated', 'A record is created or updated' (which is selected), and 'A record is deleted'.

Optimize Flow

Optimize the Flow for:

Fast Field Updates

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

Actions and Related Records

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

Is this flow making an external callout or connecting to an external system?

An asynchronous path is required for flows that involve external systems.

Add Asynchronous Path

Record-Triggered Flow

Start

Object: **Billing details and feedback** [Edit](#)

Trigger: **A record is created or updated**

Optimize for: **Actions and Related Recor...**

[+ Add Scheduled Paths \(Optional\)](#)

[↗ Open Flow Trigger Explorer for Billing ...](#)

[Run Immediately](#)



Add Element

[update records](#)

[Update Records](#)

Set Filter Conditions

Condition Requirements to Update Record

All Conditions Are Met (AND)

Field	Operator	Value
Payment_Status__c	Equals	Completed

+ Add Condition

Set Field Values for the Billing details and feedback Record

Field Value

Payment_Paid__c	\$Record > Service records > Appointment > Service A...
-----------------	---

+ Add Field

Cancel Done

← Flow Builder → billing amount fl

Select Elements

Toolbox

Manager

Search this flow...

New Resource

Edit Text Template

* API Name ⓘ

alert

Description

* Body ⓘ

Insert a resource...



View as Rich Text ▾

Dear {!\$Record.Service_records__r.Appointment__r.Customer_Details__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 .

Salesforce Sans ▾

12 ▾



Cancel

Done



Send Email



* Label

Email Alert

* API Name ⓘ

Email_Alert

Description

Use values from earlier in the flow to set the inputs for the "Send Email" core action. To use its outputs later in the flow, store them in variables.

Send Email

A_a Subject ⓘ

Thank You for Your Payment - Garage Manager 

A_a Body ⓘ

  alert 

Rich-Text-Formatted Body ⓘ

Enter value or search resources... 

Use Line Breaks ⓘ

Enter value or search resources... 

A_a Attachment ID ⓘ

 Search records... 

Record-Triggered Flow
Start

Save as

A New Version A New Flow

*Flow Label

*Flow API Name

Description

Show Advanced

Cancel Save

1. **16.1Created another Flow**

1.Go to setup ? type Flow in quick find box ? Click on the Flow and Select the New Flow.

1. Select the Record-triggered flow and Click on Create.
2. Select the Object as “ Service records”in the Drop down list.
3. Select the Trigger Flow when: “A record is Created or Updated”.
4. Select the Optimise the flow for: “Actions and Related Records” and Click on Done.
5. Under the Record-triggered Flow Click on “+” Symbol and In the Drop down List select the “Update records Element”.
6. Set a filter condition : All Conditions are met(AND)
7. Field : Quality_Check_Status__c
8. Operator : Equals
9. Value : True
10. And Set Field Values for the Billing details and feedback Record
11. Field : Service_Status__c
12. Value : Completed

13. Click On Done.
14. Click on save
15. Given the Flow label as Update Service Status , Flow Api name will be auto populated.
16. And click save, and click on activate.

Set Filter Conditions

Condition Requirements to Update Record

All Conditions Are Met (AND) ▾

Field	Operator	Value
Quality_Check_Status__c	Equals	True X

[+ Add Condition](#)

Set Field Values for the Service record Record

Field	Value
Service_Status__c	Completed

[+ Add Field](#)

17.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”.

```
AmountDistribution.apxc [AmountDistributionHandler.apxc *]
Code Coverage: None API Version: 58 Go To
1 * public class AmountDistributionHandler {
2
3     public static void amountDist(list<Appointment__c> listApp){
4         list<Service_records__c> serlist = new list <Service_records__c>();
5
6         for(Appointment__c app : listApp){
7             if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){
8                 app.Service_Amount__c = 10000;
9             }
10            else if(app.Maintenance_service__c == true && app.Repairs__c == true){
11                app.Service_Amount__c = 5000;
12            }
13            else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
14                app.Service_Amount__c = 8000;
15            }
16            else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
17                app.Service_Amount__c = 7000;
18            }
19            else if(app.Maintenance_service__c == true){
20                app.Service_Amount__c = 2000;
21            }
22        }
23    }
24
25    public static void amountDist(list<Appointment__c> listApp){
26        list<Service_records__c> serlist = new list <Service_records__c>();
27
28        for(Appointment__c app : listApp){
29            if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
30                app.Service_Amount__c = 8000;
31            }
32            else if(app.Maintenance_service__c == true && app.Repairs__c == true){
33                app.Service_Amount__c = 7000;
34            }
35            else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
36                app.Service_Amount__c = 5000;
37            }
38            else if(app.Maintenance_service__c == true){
39                app.Service_Amount__c = 2000;
40            }
41            else if(app.Repairs__c == true){
42                app.Service_Amount__c = 3000;
43            }
44            else if(app.Replacement_Parts__c == true){
45                app.Service_Amount__c = 5000;
46            }
47        }
48    }
49
50 }
```

Code:

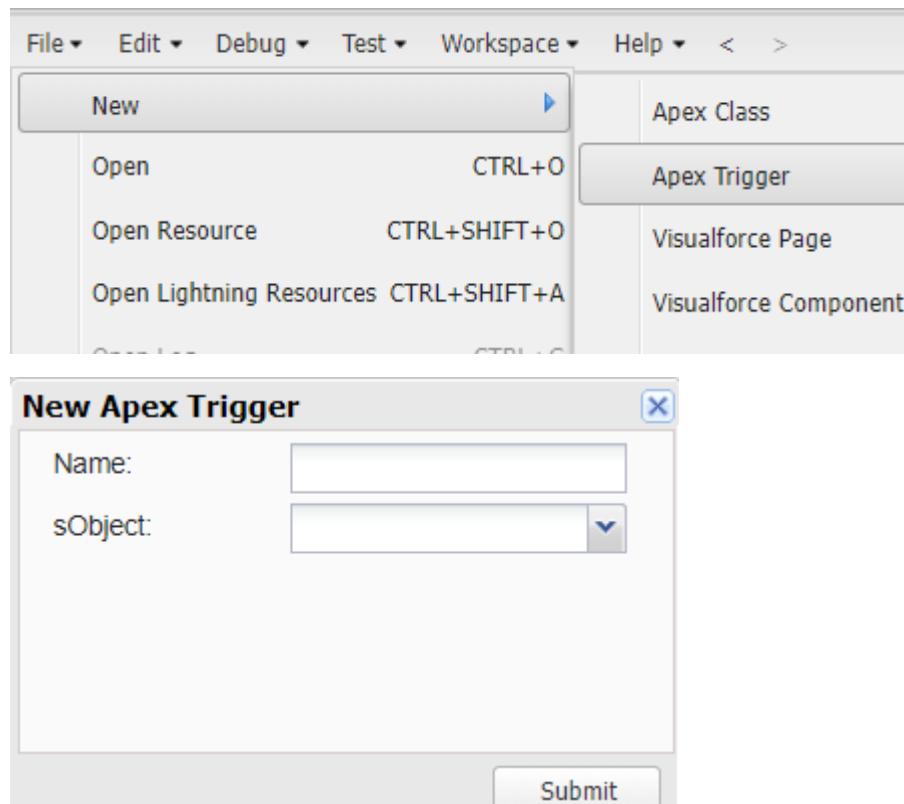
```
public class AmountDistributionHandler {
    public static void amountDist(list<Appointment__c> listApp){
        list<Service_records__c> serList = new list <Service_records__c>();
```

```
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;  
    }  
}  
}
```

17.1.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 :

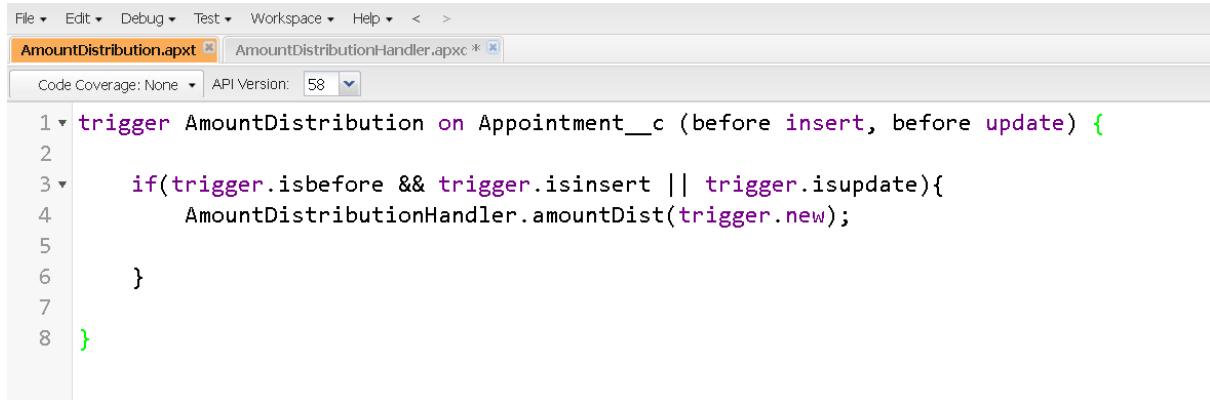
The syntax for creating trigger is :

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



The screenshot shows a Salesforce IDE interface with the following details:

- Menu bar: File ▾, Edit ▾, Debug ▾, Test ▾, Workspace ▾, Help ▾, < >
- Tab bar: AmountDistribution.apxt (selected), AmountDistributionHandler.apxc *
- Status bar: Code Coverage: None, API Version: 58
- Code editor:

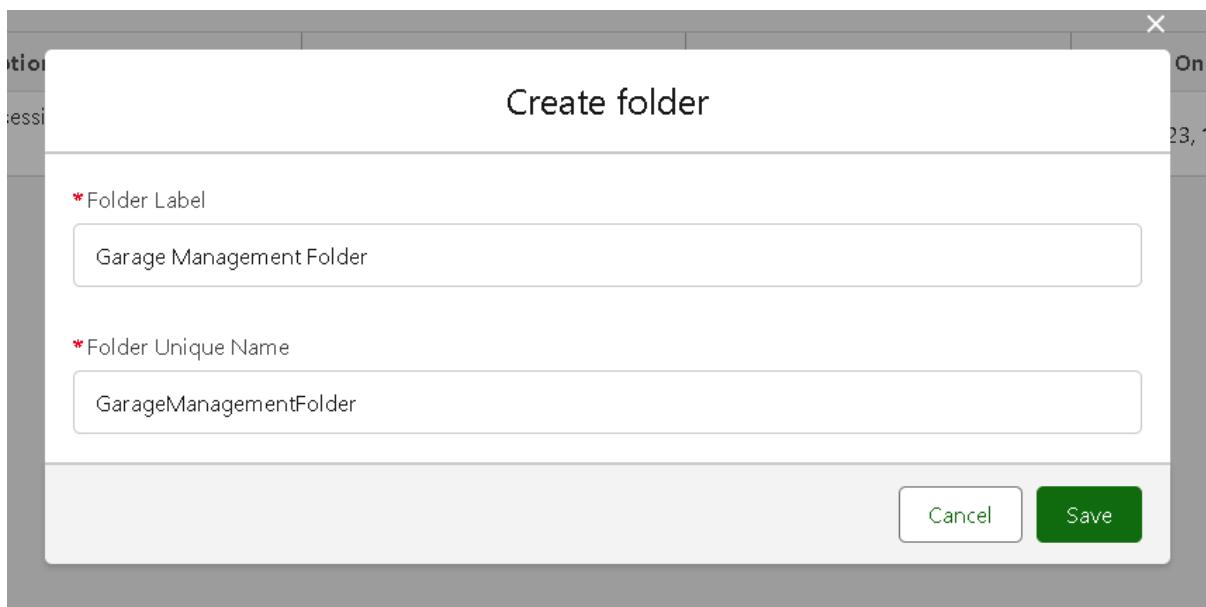
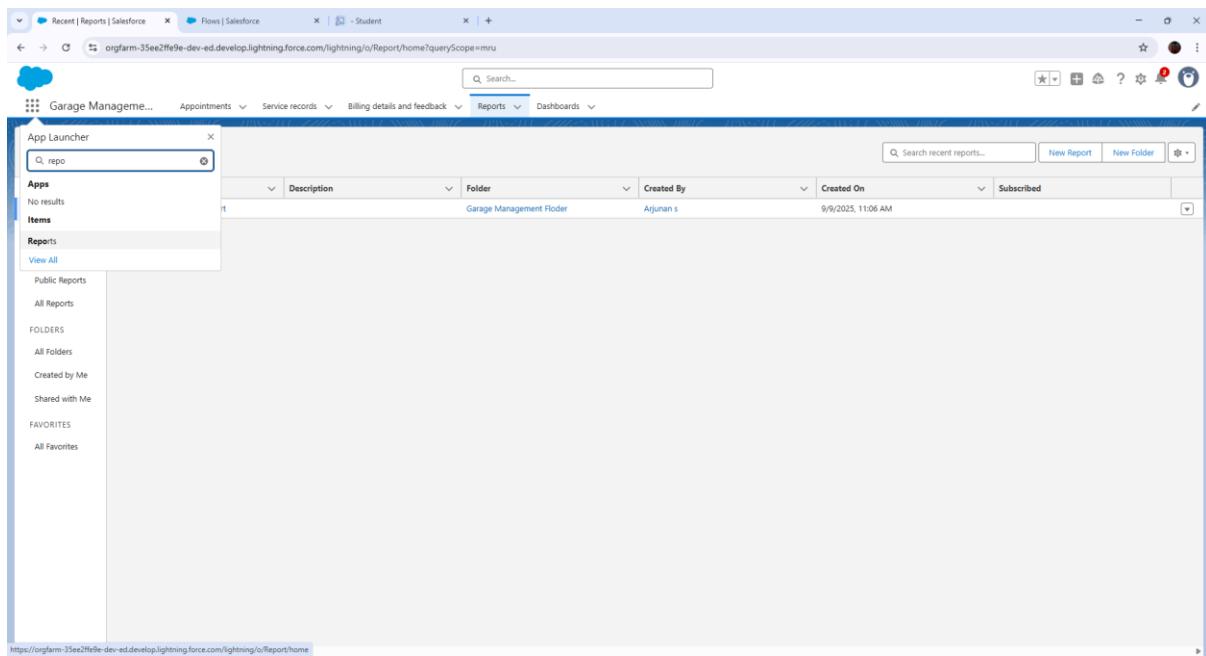
```
1 trigger AmountDistribution on Appointment__c (before insert, before update) {
2
3     if(trigger.isbefore && trigger.isinsert || trigger.isupdate){
4         AmountDistributionHandler.amountDist(trigger.new);
5
6     }
7
8 }
```

Code:

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

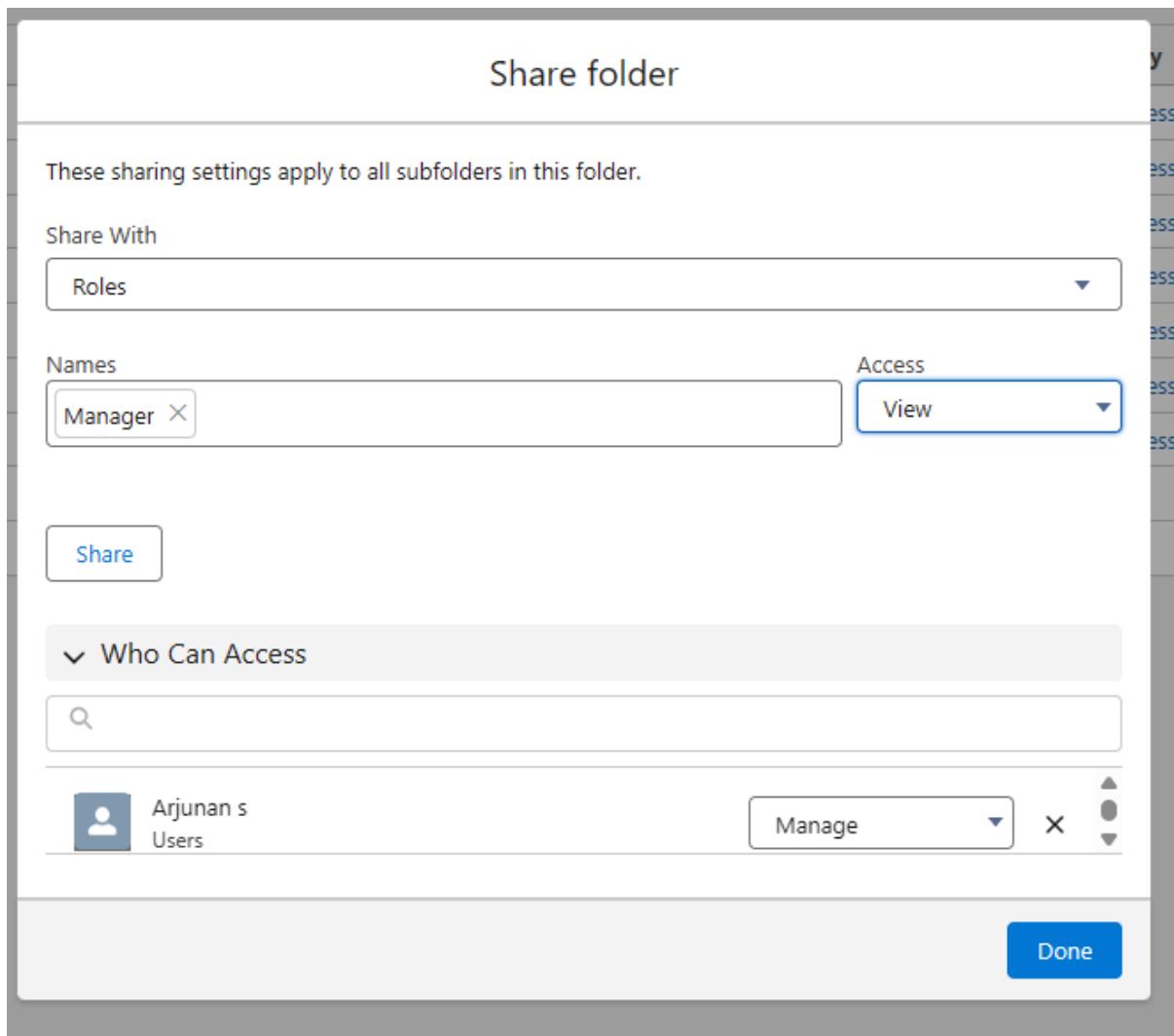
18.Created A Report Folder

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.



18.1.Shared 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.



18.2.Created 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 “Depolyed ”, click on Next.
9. now , Click on Related object box.
10. Click on Select Object, choose Appointment Object as shown in fig.
11. Again Click to relate another object.
12. And select the related object as “service records”.

13. Repeat the process and select the related object as “ Billing details and feedback”.

14. And click on save.

Label	Name	Description	Category	Created Date	Last Modified Date
Orchestration Run Logs Spring '24	flow_orchestration_log_oottb_crt_two_four_eight	Find out which orchestration run logs were created and what happened in their associated orchestration runs.	Other Repor...	8/30/2025, 12:34 PM	
Orchestration Runs Spring '24	flow_orchestration_run_oottb_crt_two_four_eight	Find out which orchestration runs were created.	Other Repor...	8/30/2025, 12:34 PM	
Orchestration Stage Runs Spring '24	flow_orchestration_stage_run_oottb_crt_two_four_eight	Find out which orchestration stage runs were created and the current status of each run.	Other Repor...	8/30/2025, 12:34 PM	
Orchestration Step Runs Spring '24	flow_orchestration_step_run_oottb_crt_two_four_eight	Find out which orchestration step runs were created and the current status of each run.	Other Repor...	8/30/2025, 12:34 PM	
Orchestration Work Items Spring '24	flow_orchestration_work_item_oottb_crt_two_four_eig...	Find out which orchestration work items were created, who's the associated assignee, and what's the current status of e...	Other Repor...	8/30/2025, 12:34 PM	
Program Definition Spring '24	Program_Definition_sfcdSESV60	Review your analytics with a program-like structure. See each program task, target day, results, and more directly in a ...	Other Repor...	8/30/2025, 12:34 PM	
Program Definition Summer '24	Program_Definition_sfcdSESV61	Review your analytics with a program-like structure. See each program task, target day, results, and more directly in a ...	Other Repor...	8/30/2025, 12:34 PM	
Program Item Progress Spring '24	Program_Task_Progress_sfcdSESV60	Report on tasks like exercises, milestones, and outcome progress. Overall program progress isn't captured in this report.	Other Repor...	8/30/2025, 12:34 PM	
Program Item Progress Summer '24	Program_Task_Progress_sfcdSESV61	Report on tasks like exercises, milestones, and outcomes progress. Overall program progress isn't captured in this report.	Other Repor...	8/30/2025, 12:34 PM	
Program Progress Spring '24	Program_Progress_sfcdSESV60	Report on program progress. Specific progress on milestones and exercises aren't captured in this report.	Other Repor...	8/30/2025, 12:34 PM	
Program Progress Summer '24	Program_Progress_sfcdSESV61	Report on program progress. Specific progress on milestones and exercises aren't captured in this report.	Other Repor...	8/30/2025, 12:34 PM	
Screen Flows	screen_flows_prebuilt_crt	Find out which flows get executed and how long users take to complete each flow screen.	Other Repor...	8/30/2025, 12:34 PM	
Service information	Service_information	Service information	Other Repor...	9/9/2025, 10:59 AM	

1 Define the Custom Report Type

Report Type Focus

Primary Object Customer Details

Details

* Display Label: Service information * API Name: Service_information

* Description: Service information

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

* Store in Category: Other Reports

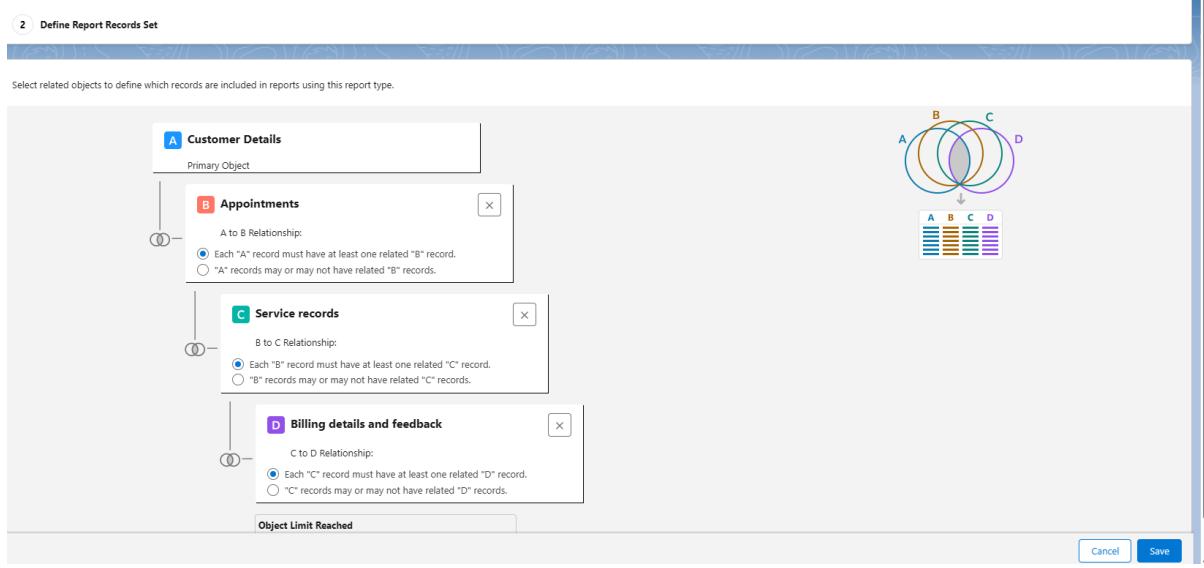
Set Availability

An in-development report type is visible only to users with the Manage Custom Report Types permission. A deployed report type is available to all users.

Status:

- In Development
- Deployed

Cancel Save



18.3.CreatedReport

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.
5. Their outline pane is opened already, select the fields that mentioned below in column section.
 - a. Customer name
 - b. Appointment Date
 - c. Service Status
 - d. Payment paid
6. Remove the unnecessary fields.
7. Select the fields that mentioned below in GROUP ROWS section.
 - a. Rating for Service
8. Select the fields that mentioned below in GROUP ROWS section.
 - a. Payment Status
9. Click on Add Chart , Select the Line Chart.

- 10.Click on save, Give the report Name : New Service information Report
- 11.Report unique Name is auto populated.
- 12.Select the folder the created and Click on save.

The screenshot shows the 'Reports' section of a software interface. On the left, there's a sidebar with categories like 'RECENT', 'REPORTS', 'FOLDERS', and 'PRIVATE REPORTS'. The main area displays a table with columns: 'Report Name', 'Description', 'Folder', 'Created By', 'Created On', and 'Subscribed'. A single row is selected, showing 'New Service information Report' under 'Report Name', 'Garage Management Folder' under 'Folder', and 'Arjunan S' under 'Created By'. At the top right, there are buttons for 'Search recent reports...', 'New Report', 'New Folder', and 'Report Details'.

This screenshot shows the 'Create Report' dialog. On the left, a sidebar lists various report categories. In the center, a table titled 'Select a Report Type' shows a list of report types categorized by 'Category'. One entry, 'Service information', is highlighted. On the right, a panel titled 'Details' provides specific information about the selected report, including its description ('Service information'), creation details ('Created By You' and 'Created By Others'), and the objects used ('Customer Details', 'Appointment', 'Service records', and 'Billing details and feedback').

This screenshot shows the preview of the 'New Service information Report'. The top part of the preview shows a table with data grouped by 'Rating for service' and 'Payment Status'. The bottom part shows a chart titled 'Sum of Payment Paid' versus 'Rating for service', which is a line graph showing a downward trend from approximately 18K at rating 4 to 8K at rating 5. The preview also includes a 'Details' section showing individual customer records.

Rating for service	Payment Status	Completed	Total
4	Sum of Payment Paid Record Count	₹15,000 4	₹15,000 4
5	Sum of Payment Paid Record Count	₹5,000 2	₹5,000 2
Total	Sum of Payment Paid Record Count	₹20,000 6	₹20,000 6

Save Report

* Report Name	New Service information Report
Report Unique Name ⓘ	New_Service_Information_Report_Xo1
Report Description	
Folder	Garage Management folder <input type="button" value="Select Folder"/>
<input type="button" value="Cancel"/> <input type="button" value="Save"/>	

19.Created Dashboard Folder

1. Click on the app launcher and search for dashboard.
2. Click on dashboard tab.
3. Click new folder, give the folder label as “ Service Rating dashboard”.
4. Folder unique name will be auto populated.
5. Click save.

Create folder

* Folder Label	Service Rating
* Folder Unique Name	ServiceRating
<input type="button" value="Cancel"/> <input type="button" value="Save"/>	

6. Follow the same steps, from Reports Milestone and Activity 2, and provide the sharing settings for the folder that was just created.

19.1Create 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,

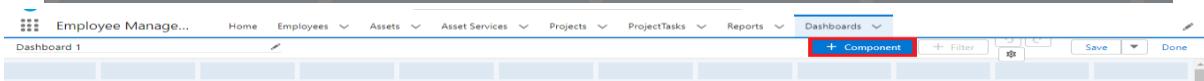
New Dashboard

* Name
Customer Review

Description

Folder
Service Rating dashboard

3.



4. Select a Report and click on select.

Select Report

Reports

- Recent
- Created by Me
- Private Reports
- Public Reports
- All Reports

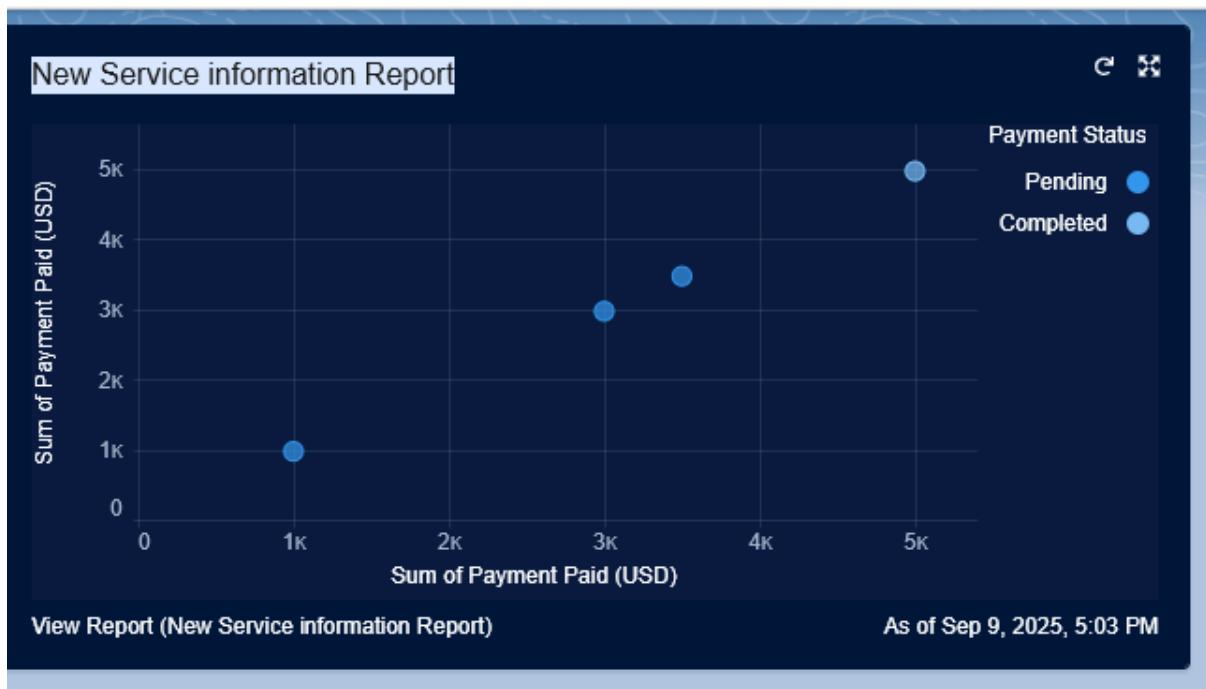
Folders

- Created by Me
- Shared with Me
- All Folders

Select Report

New Service Information Report
Ajujan - Sep 9, 2025, 2:23 PM - Garage Management folder

5. Select the Line Chart. Change the theme.
6. Click Add then click on Save and then click on Done.
7. Preview is shown below.
8. After that Click on Subscribe on top right.
9. Set the Frequency as “ weekly ”.
10. Set a day as monday.
11. And Click on save.



Edit Subscription

Schedule dashboard refreshes and subscribe to receive results.

Settings

Frequency

- Daily
- Weekly
- Monthly

Days

- Sun
- Mon
- Tue
- Wed
- Thu
- Fri
- Sat

Time

3:00 PM

Recipients

⚠️ Recipients see the same report data as the person running the report.

Receive new results by email when dashboard is refreshed. (i)

Send email to
Me

[Edit Recipients](#)

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

20. User Adoption

Created Records

To create a record in the follow objects follow these steps

1. Click on the app launcher located at the left side of the screen.
2. Search for “**Garage Management**” and click on it.
3. Click on the “**Consumer details tab**”.
4. Click on new and fill the details as shown below figs, and click save.

The screenshot shows a mobile application interface titled "New Customer Detail". At the top right, there is a note: "* = Required Information". Below the title, there is a section labeled "Information" containing three input fields: "Customer Name" (with placeholder "Mac"), "Phone number" (with placeholder "5678765567"), and "Gmail" (with placeholder "mac@gmail.com"). To the right of these fields, under the heading "Owner", is a small profile icon followed by the text "Annapurna SmartBridge". At the bottom of the screen, there are three buttons: "Cancel", "Save & New" (highlighted in blue), and "Save".

Now, Create the Appointment Record

1. Click on the “**Appointment tab**”.
2. Enter the customer details as created, while entering Appointment Date enter the date less than the created date.
3. Match the validation while entering the vehicle number plate.
4. Select the services you need.
5. Click on save to see the Service Amount.

The screenshot shows the Garage Management software interface. The top navigation bar includes links for Customer Details, Appointments, Service records, Billing details and feedback, Reports, and Dashboards. The current page is the Appointments section, specifically the 'Appointment' tab for entry 'app-016'. The form fields include:

- Appointment Name:** app-016
- Customer Details:** Mac
- * Appointment Date:** 13/11/2024
- Maintenance service:**
- Repairs:**
- Replacement Parts:**
- Service Amount:** (empty input field)
- * Vehicle number plate:** TS30EU0443
- Owner:** Annapurna SmartBridge

At the bottom, there are buttons for **Cancel**, **Save**, and **Save & New**. Below the buttons, a note states: *** = Required Information**.

Now, Create a service Record

1. Click on the “Service record tab”.
2. Enter the Appointment, and started is selected as default.
3. Click on save.

The screenshot shows the Garage Management software interface. The current page is the 'New Service record' screen. The form fields include:

- Information**
- Service Record Name:** app-016
- Owner:** Annapurna SmartBridge
- * Appointment:** app-016
- Quality Check Status:**
- Service Status:** Started

At the bottom, there are buttons for **Cancel**, **Save & New**, and **Save**. Below the buttons, a note states: *** = Required Information**.

4. Open the record and click on Quality check status as true.
5. Click on save.

Service Record Name
ser-010

Owner
 Annapurna SmartBridge

* Appointment
 app-016 X

Quality Check Status ↻

Service Status
Started ▼

service date
18/11/2024
This field is calculated upon save

Created By
 Annapurna SmartBridge, 18/11/2024, 4:32 pm

Cancel Save Last Modified By
 Annapurna SmartBridge, 18/11/2024

6. Now automatically Service status will be moved to completed.

Related Details

Service Record Name
ser-010

Owner
 Annapurna SmartBridge Edit

Appointment
[app-016](#) Edit

Quality Check Status Edit

Service Status
Completed Edit

service date
18/11/2024

Created By
 Annapurna SmartBridge, 18/11/2024, 4:32 pm

Last Modified By
 Annapurna SmartBridge, 18/11/2024, 4:34 pm