

# Garage Management System

Submitted By:

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## Project Overview

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

### 1. Objectives

- **Efficient Management:** Automate and streamline workflows for vehicle repair, maintenance scheduling, and part inventory management.
- **Customer-Centric Approach:** Improve the customer experience through personalized communication, service history tracking, and timely updates.
- **Data-Driven Decisions:** Use Salesforce reports and dashboards for insights into service trends, revenue performance, and inventory levels.
- **Scalability:** Leverage Salesforce's cloud infrastructure to scale operations as the business grows.
- **Integration:** Seamlessly integrate with external systems like accounting software, payment gateways, and parts suppliers

### 2. Salesforce Key Features and Concepts Utilized

- **Appointment Scheduling:**

- Allow customers to book services via Salesforce Experience Cloud or other integrated portals.
- Schedule and assign tasks to mechanics and service staff.
- Send automated appointment confirmations and reminders.

- **Service Tracking:**

- Log ongoing repairs and maintenance activities.
- Monitor job progress and estimated completion times.
- Record parts and labor used for billing purposes.

- **Billing and Payments:**

- Generate invoices automatically after service completion.

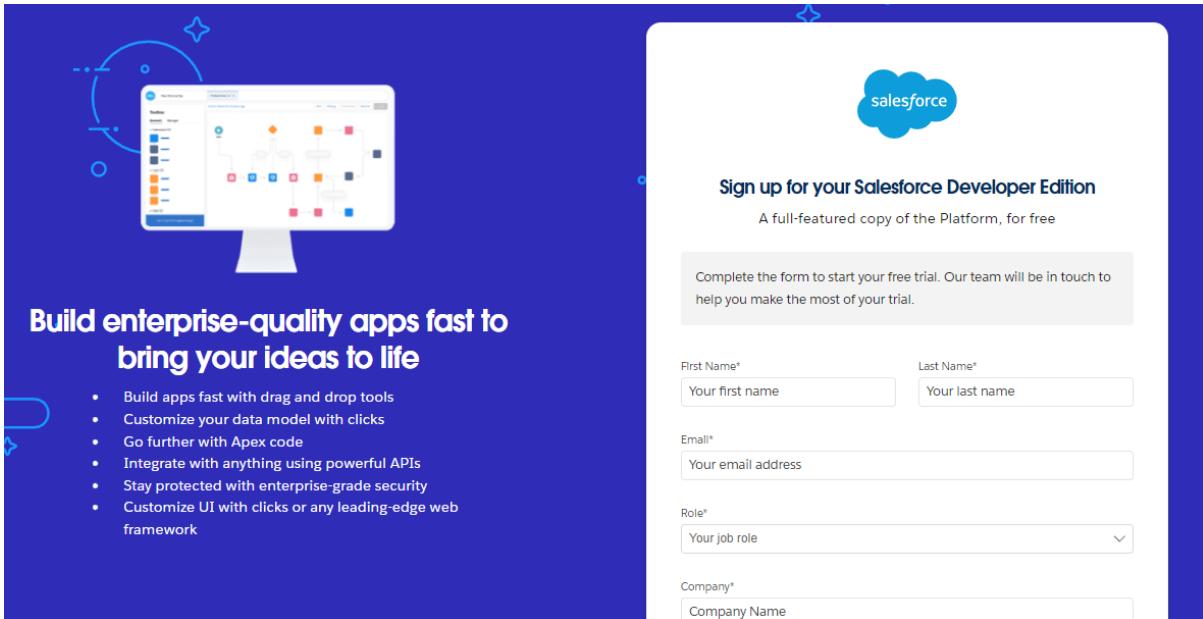
- Integrate with payment gateways for seamless transactions.
- Track outstanding payments and send reminders.
- **Reports and Dashboards:**
  - Visualize key metrics such as revenue, service turnaround time, and customer retention rates.
  - Generate customizable reports for inventory, staff performance, and financial summaries.

### 3. Detailed Steps to Solution Design

#### Step 1: Account Creation

##### Creating a developer org in salesforce.

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



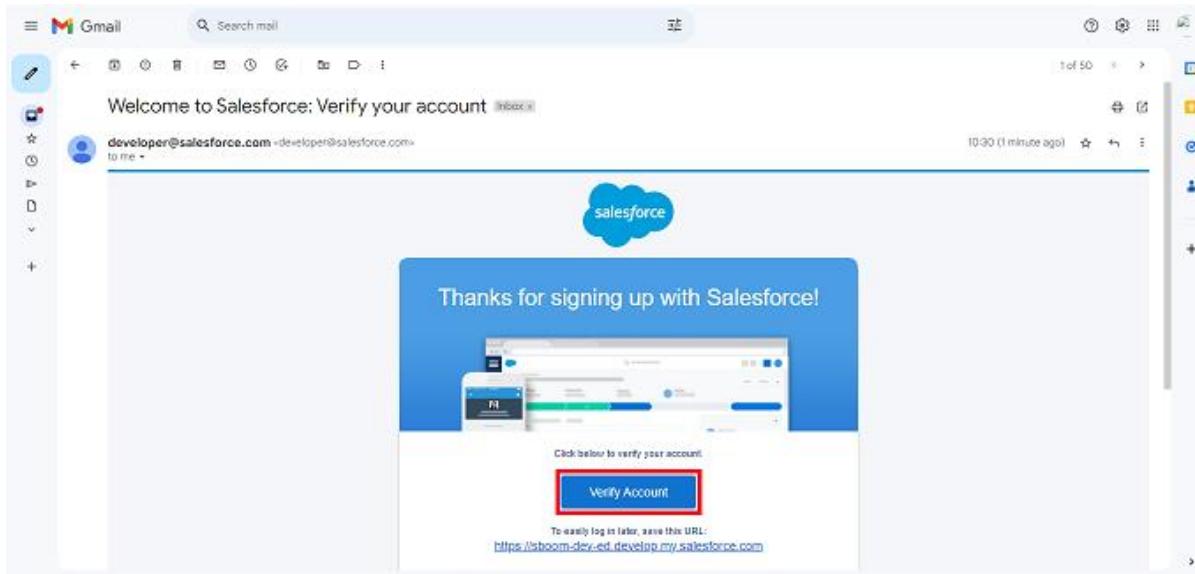
1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format : `username@organization.com`

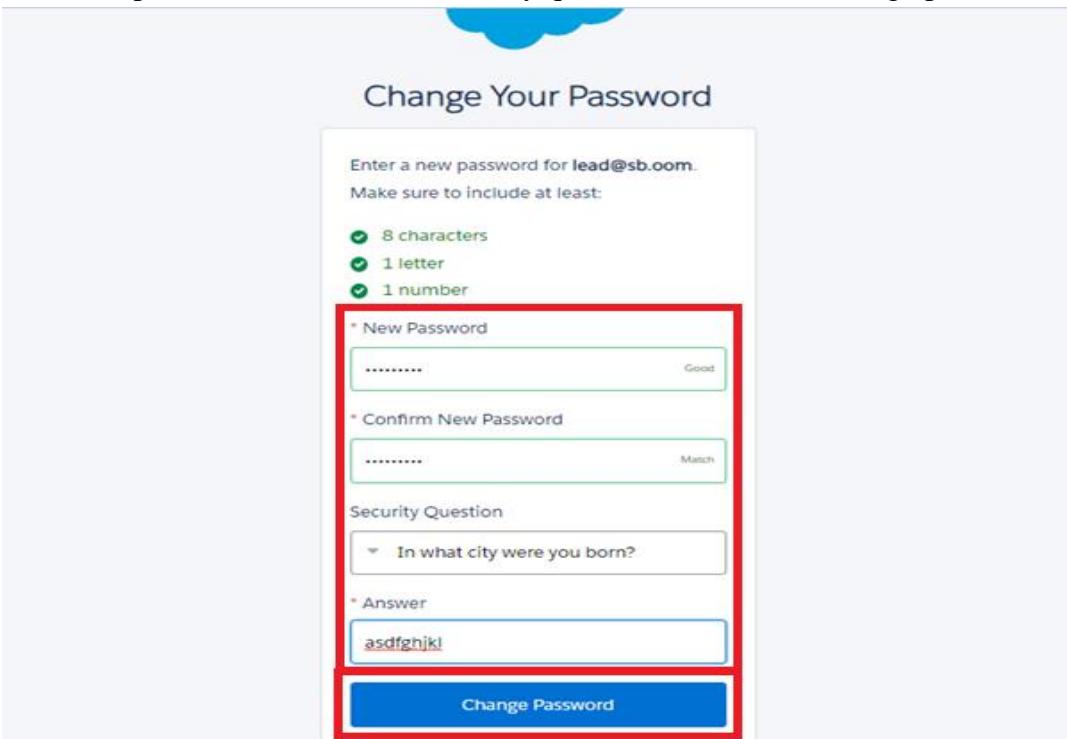
Click on sign me up after filling these.

#### Step 2: 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.



Change Your Password

Enter a new password for lead@sb.oom.  
Make sure to include at least:

- 8 characters
- 1 letter
- 1 number

\* New Password

..... Good

\* Confirm New Password

..... Match

Security Question

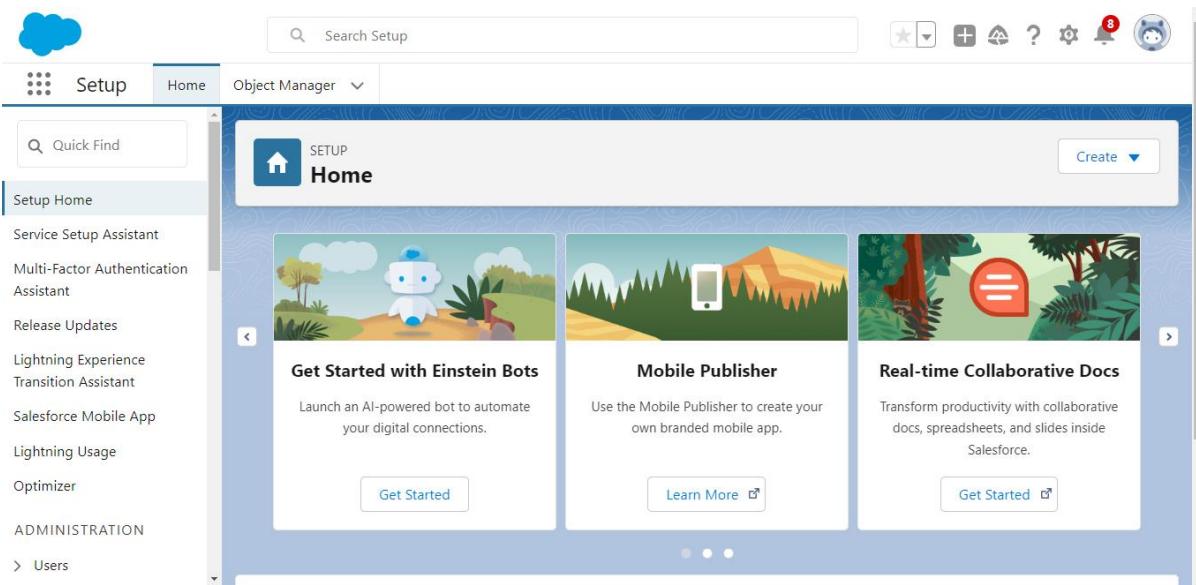
In what city were you born?

\* Answer

asdfghjkl

Change Password

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

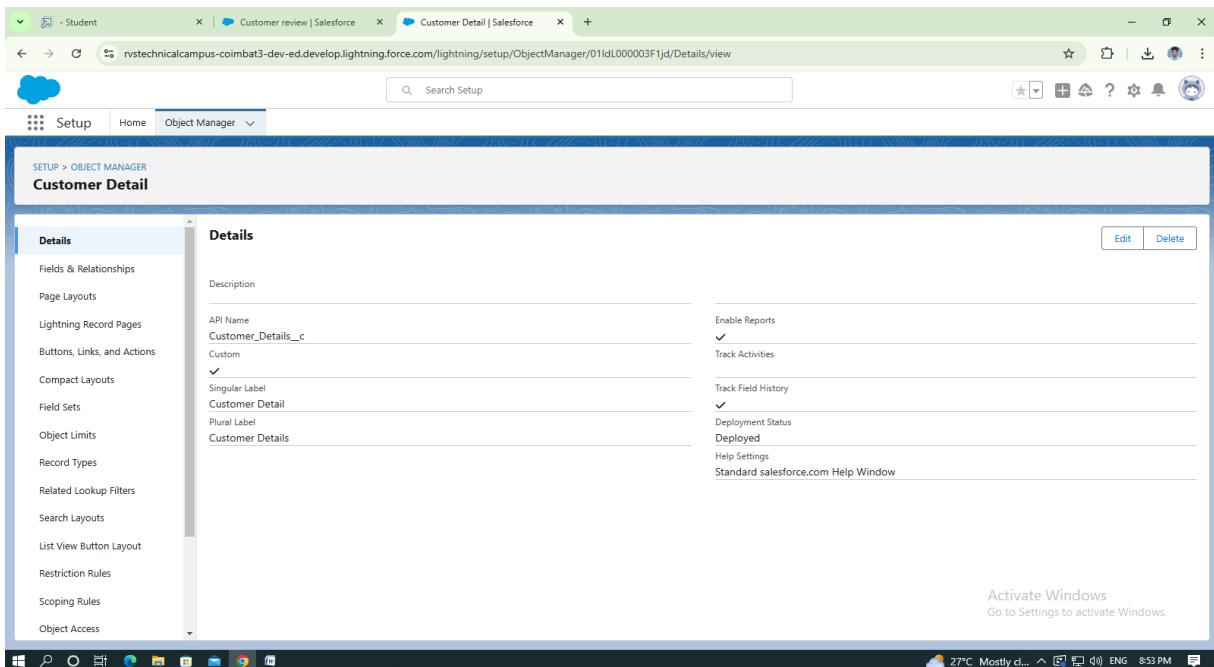


The screenshot shows the Salesforce Setup Home page. On the left, there's a sidebar with links like Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration. The main area features three cards: "Get Started with Einstein Bots" (Launch an AI-powered bot to automate your digital connections), "Mobile Publisher" (Use the Mobile Publisher to create your own branded mobile app), and "Real-time Collaborative Docs" (Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce). Each card has a "Get Started" button.

## Step 3: Create Customer Detail Object

To create an object:

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

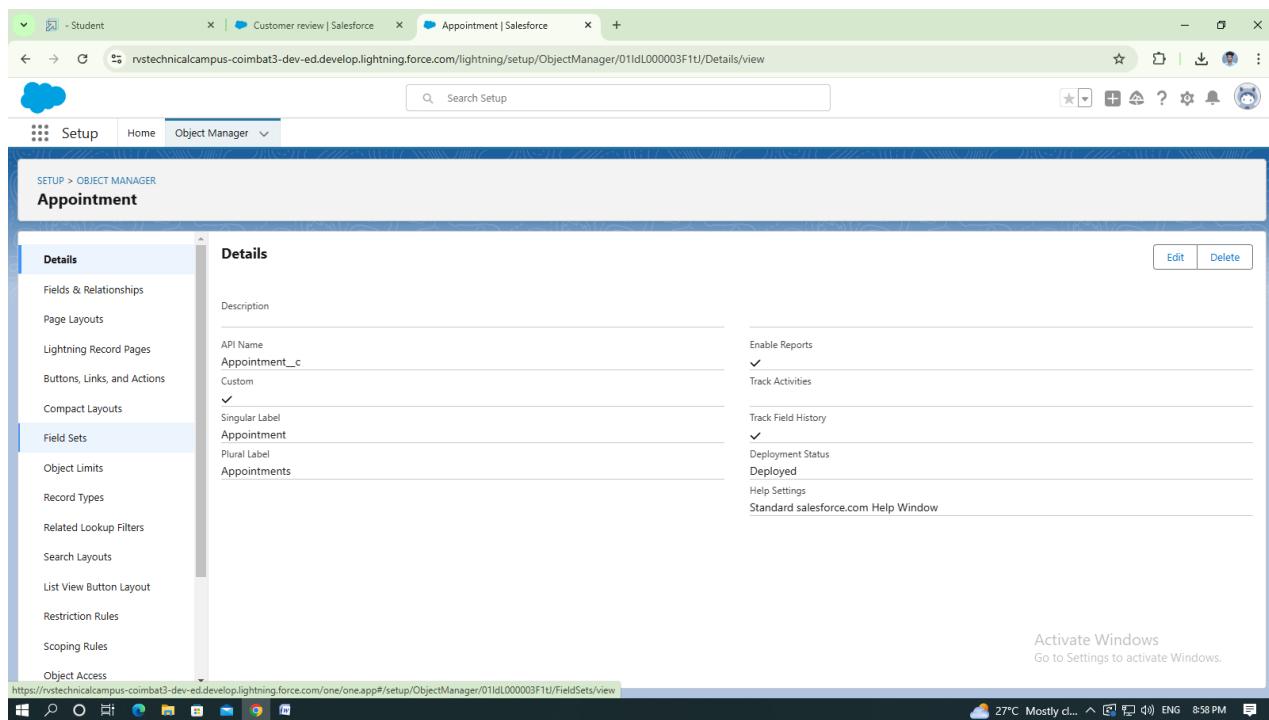


The screenshot shows the Salesforce Object Manager page for a "Customer Detail" object. The left sidebar lists various configuration tabs: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, and Object Access. The main panel displays the "Details" tab, which includes fields for API Name (Customer\_Details\_\_c), Singular Label (Customer Detail), and Plural Label (Customer Details). It also shows checkboxes for Enable Reports (checked), Track Activities (unchecked), and Track Field History (checked). Deployment status is listed as Deployed. At the bottom right, there are "Edit" and "Delete" buttons, and a message: "Activate Windows Go to Settings to activate Windows."

## Step 4: Create Appointment Objects

To create an object:

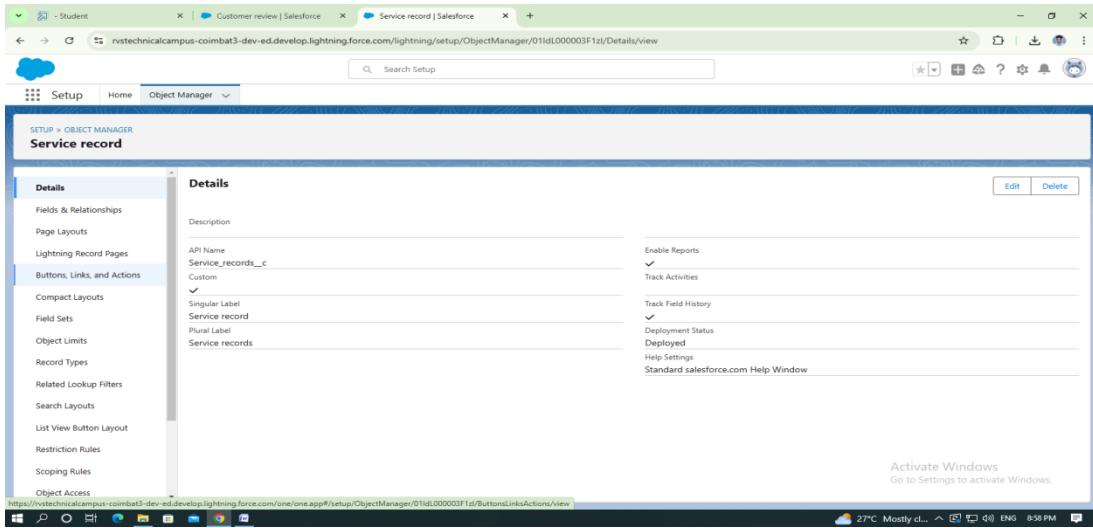
1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
  1. Enter the label name >> Appointment
  2. Plural label name >> Appointments
  3. Enter Record Name Label and Format
    - Record Name >> Appointment Name
    - Data Type >> Auto Number
    - Display Format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



## Step 5: Create Service Record Object

To create an object:

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

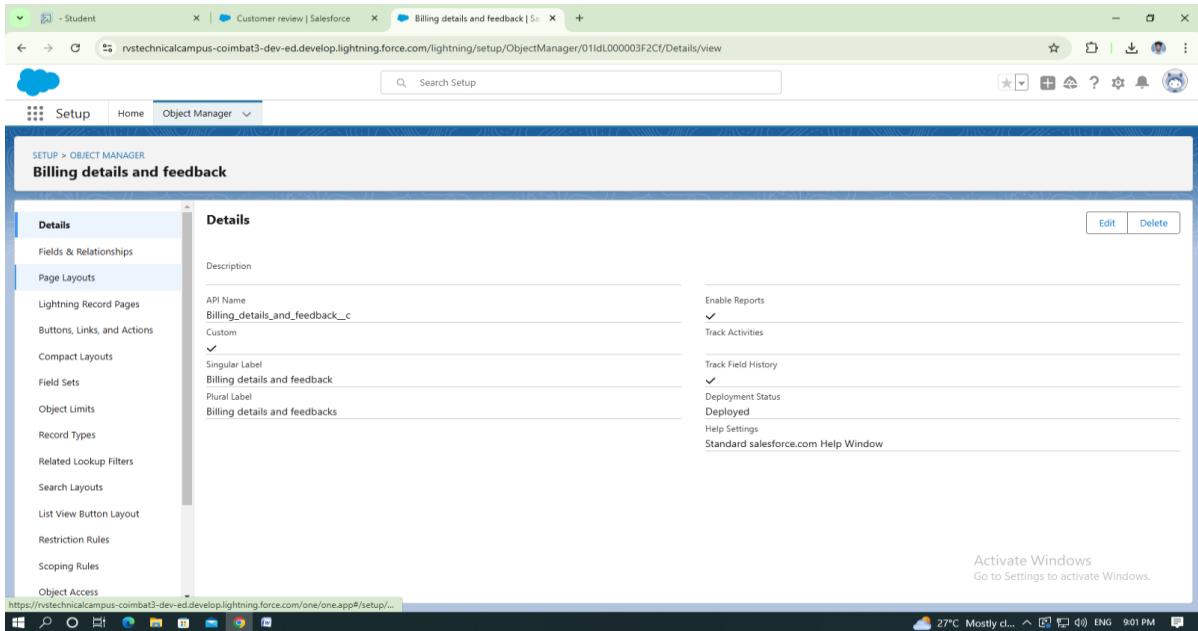


The screenshot shows the Salesforce Setup interface under 'Object Manager'. A sidebar on the left lists various object configuration options like Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, and Object Access. The main panel is titled 'Service record' under 'SETUP > OBJECT MANAGER'. It displays the 'Details' tab for the object. On the left, there's a 'Description' section with fields for API Name ('Service\_records\_\_c'), Singular Label ('Service record'), and Plural Label ('Service records'). On the right, there are sections for 'Enable Reports' (checked), 'Track Activities' (checked), 'Track Field History' (checked), 'Deployment Status' (set to 'Deployed'), 'Help Settings' (link to Standard salesforce.com Help Window), and an 'Activate Windows' note at the bottom.

## Step 6: Create Billing Details and Feedback Object

To create an object:

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

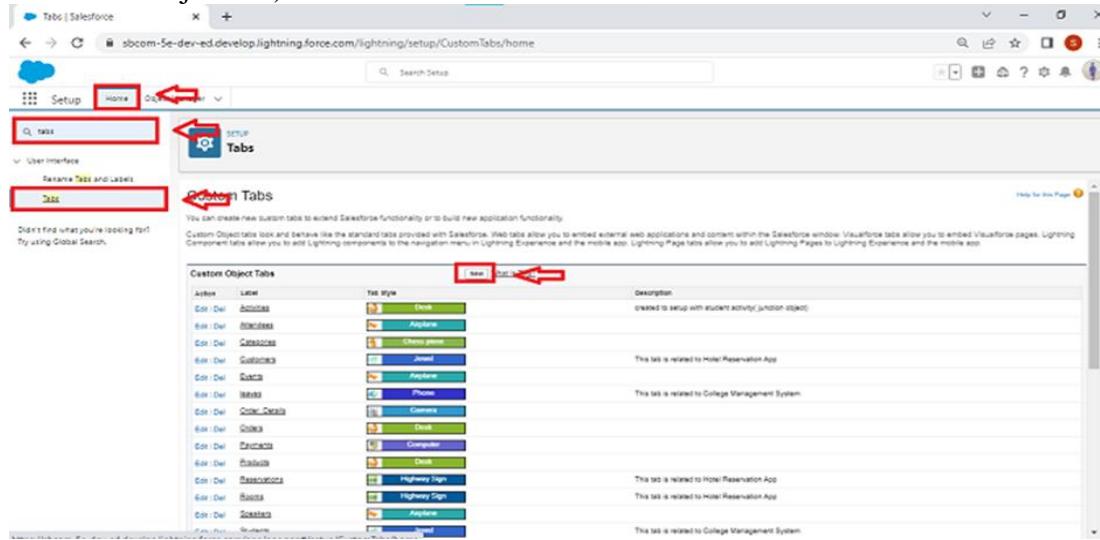


The screenshot shows the Salesforce Setup interface under 'Object Manager'. The sidebar and main panel structure are identical to the previous screenshot, but the object being configured is now 'Billing details and feedback'. The 'Details' tab shows the API Name ('Billing\_details\_and\_feedback\_\_c'), Singular Label ('Billing details and feedback'), and Plural Label ('Billing details and feedbacks'). The right side of the screen shows the same configuration options as the previous screenshot, including checked boxes for Enable Reports, Track Activities, and Track Field History, along with deployment status and help settings.

## Step 7: Creating Customer 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)



The screenshot shows the Salesforce Setup interface with the 'Custom Tabs' page open. The search bar at the top contains the text 'Tabs'. The 'Customize' tab is selected. The 'New' button in the top right corner of the main content area is highlighted with a red box.

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



**New Custom Object Tab**

Step 1. Enter the Details

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

Select an existing custom object or [create a new custom object now](#).

Object: **Customer Details**

Tab Style: **Desktop**

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.  
Splash Page Custom Link: **--None--**

Enter a short description.

Description:

Next Cancel

### Tab Style Selector

[Create your own style](#)

[Hide styles which are used on other tabs](#)

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

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

### Step 3. Add to Custom Apps

Step 3 of 3

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

Custom App	<input type="checkbox"/> Include Tab
Platform (standard_Platform)	<input type="checkbox"/>
Sales (standard_Sales)	<input type="checkbox"/>
Service (standard_Service)	<input type="checkbox"/>
Marketing (standard_Marketing)	<input type="checkbox"/>
Sample Console (standard_ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>



Analytics Studio (standard_Insights)	<input type="checkbox"/>
Sales Console (standard_LightningSalesConsole)	<input type="checkbox"/>
Service Console (standard_LightningService)	<input type="checkbox"/>
Sales (standard_LightningSales)	<input type="checkbox"/>
Lightning Usage App (standard_LightningInstrumentation)	<input type="checkbox"/>
Digital Experiences (standard_SalesforceCMS)	<input type="checkbox"/>
Queue Management (standard_QueueManagement)	<input type="checkbox"/>
Bolt Solutions (standard_LightningBolt)	<input type="checkbox"/>
Data Manager (standard_DataManager)	<input type="checkbox"/>
Salesforce Scheduler Setup (standard_LightningScheduler)	<input type="checkbox"/>

Append tab to users' existing personal customizations



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

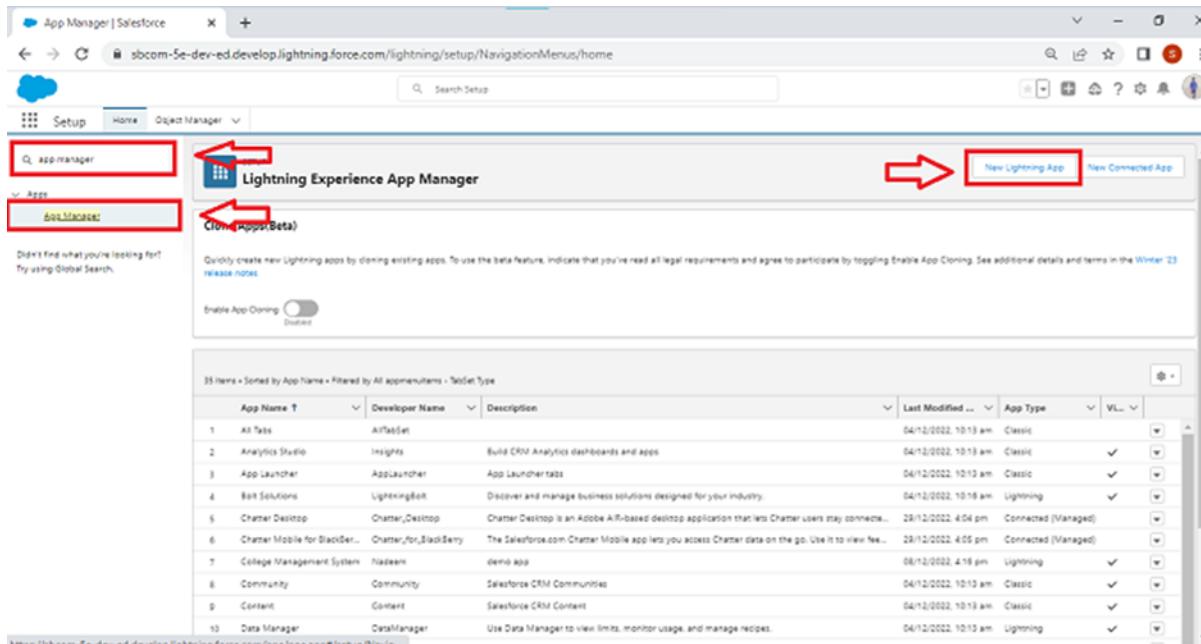
## Step 8: Creating Remaining Tabs

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

## Step 9: Create a Lightning App

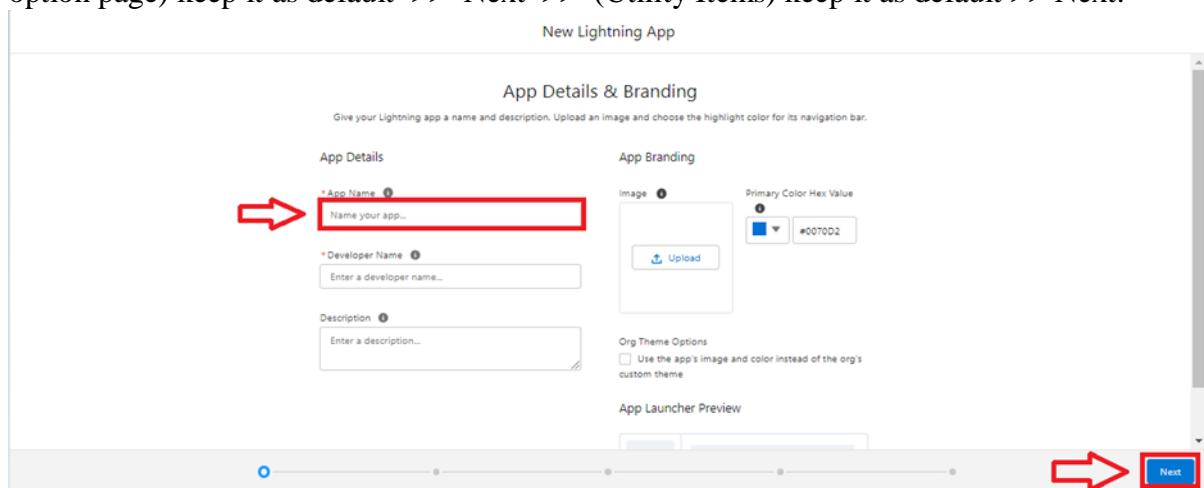
To create a lightning app page:

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



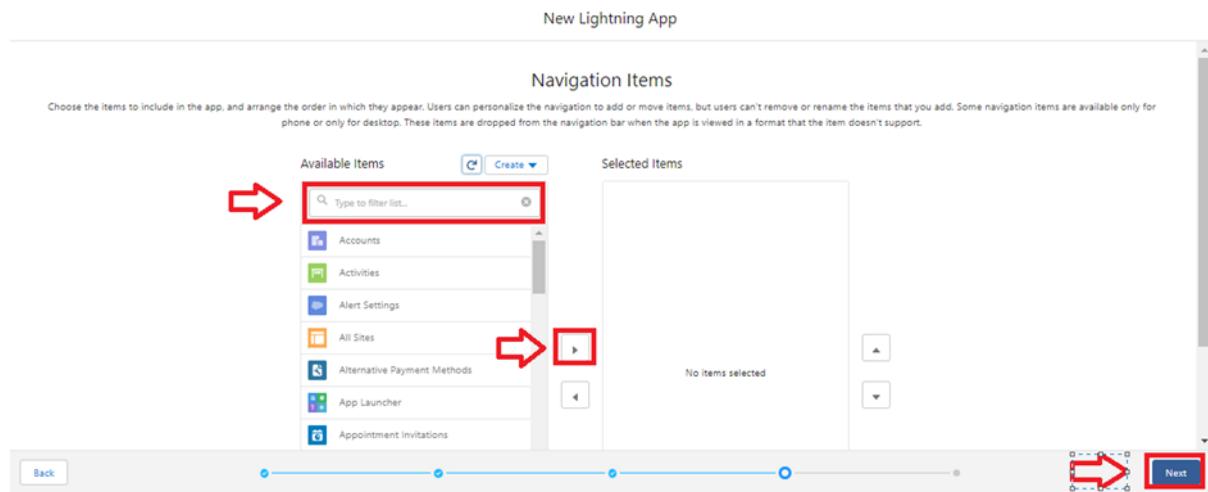
The screenshot shows the Salesforce App Manager interface. At the top, there is a search bar and a navigation menu with tabs like Setup, Home, Object Manager, and a search bar. Below the navigation is a sidebar with sections for Q: app manager, Apps, and App Manager (Cloud). A red box highlights the 'Q: app manager' section. In the center, there is a title 'Lightning Experience App Manager' with a blue icon. To its right is a red box highlighting the 'New Lightning App' button. Below the title, there is a note about cloning existing apps and enabling the beta feature. At the bottom, there is a table listing various apps with columns for App Name, Developer Name, Description, Last Modified, App Type, and more. A red box highlights the 'Cloud (Beta)' link in the sidebar.

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.



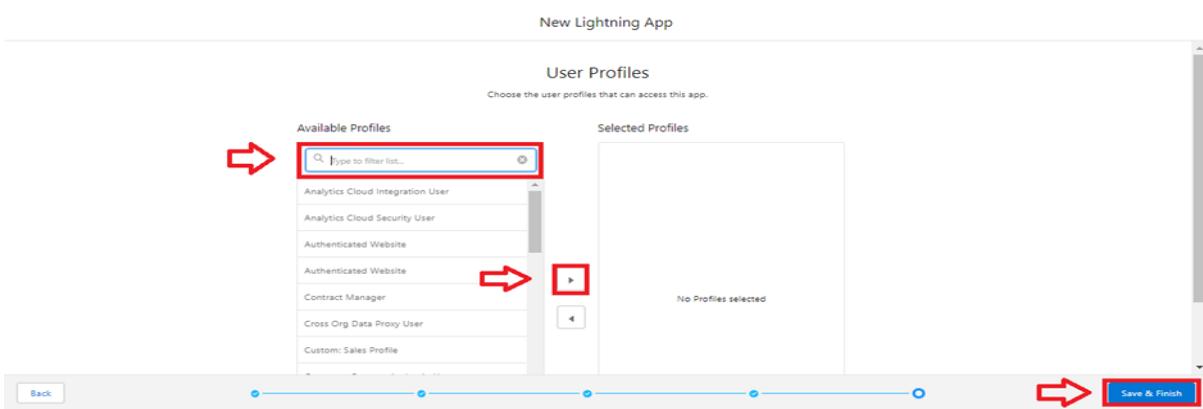
The screenshot shows the 'New Lightning App' configuration page. At the top, there is a title 'New Lightning App'. Below it, there are two main sections: 'App Details' and 'App Branding'. The 'App Details' section contains fields for 'App Name' (with a red arrow pointing to the input field 'Name your app...'), 'Developer Name' (with a placeholder 'Enter a developer name...'), and 'Description' (with a placeholder 'Enter a description...'). The 'App Branding' section contains a 'Primary Color Hex Value' field set to '#0070D2' and a checkbox for 'Org Theme Options'. At the bottom, there is a 'Next' button highlighted with a red arrow.

### 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:



Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.

## Step 10: Creation of Fields for The Customer DetailsObject

### 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.

The screenshot shows the Salesforce Object Manager interface. At the top, there is a search bar with the text 'cus' and buttons for 'Schema Builder' and 'Create'. Below the header, it says '2 Items, Sorted by Label'. A table lists two objects:

Label	API Name	Type	Description	Last Modified	Deployed
Customer	Customer	Standard Object			
Customer Details	Customer_Details_c	Custom Object		05/10/2023	✓

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

The screenshot shows the 'Fields & Relationships' page for the 'Customer1' object. On the left, there is a sidebar with various setup options like Page Layouts, Lightning Record Pages, etc. The main area shows a table of fields:

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

Annotations include a red arrow pointing to the 'Customer1' object label at the top, another red arrow pointing to the 'Fields & Relationships' tab in the sidebar, and a third red arrow pointing to the 'New' button at the top right of the table.

## 0. Select Data Type as a “Phone”

The screenshot shows the 'Field Types' list in the 'Customer1' object setup. The 'Fields & Relationships' tab is selected in the sidebar. The list includes various data types like Currency, Date, Email, Geolocation, Number, Percent, and Phone. The 'Phone' type is highlighted with a red box and a red arrow pointing to its description: 'Allows users to enter any phone number. Automatically formats it as a phone number.'

## 0. Click on next.

Setup > Object Manager Customer

Edit Custom Field Phone no

Custom Field Definition Edit

Field Information

Field Label: Phone no  
Field Name: Phone\_no

Data Type: Phone

General Options

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

Default Value: Show Formula Editor

Save Cancel

5. Fill the Above as following:

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

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

## 2. To create another fields in an object:

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

## Step 11: Creation of Lookup Field

### Creation of Lookup Field on Appointment Object :

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

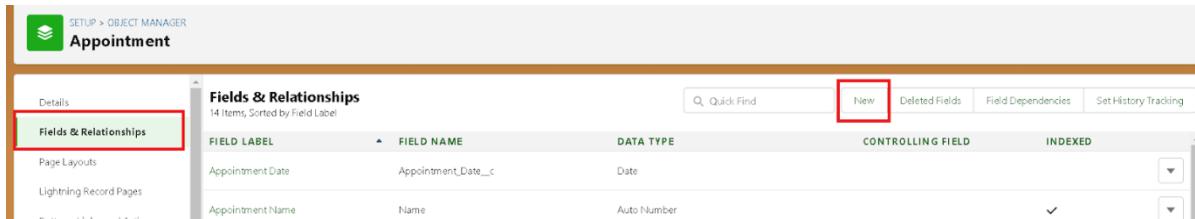
Setup > Object Manager

Object Manager

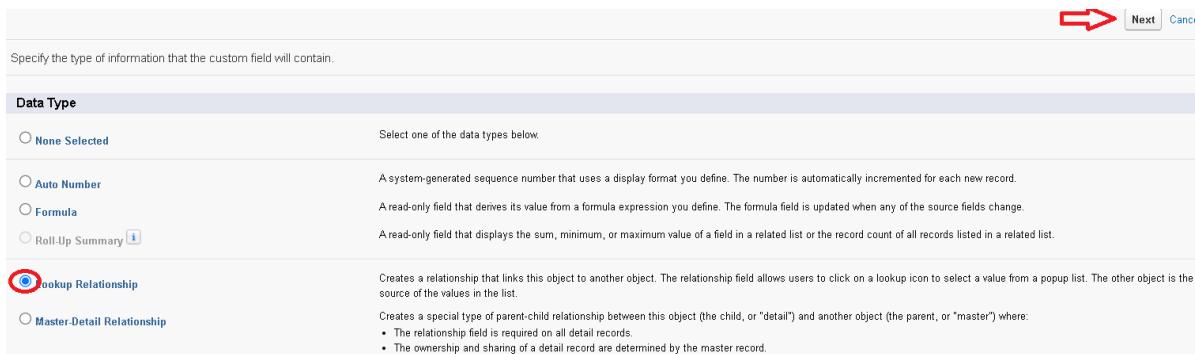
7 Items, Sorted by Label

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Appointment	Appointment__c	Custom Object		24/08/2023	✓
Appointment Category	AppointmentCategory	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invittee	AppointmentInvittee	Standard Object			

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



3. Select “Look-up relationship” as data type and click Next.



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

**Data Type**

- None Selected Select one of the data types below.
- Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Formula A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
  - Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
    - The relationship field is required on all detail records.
    - The ownership and sharing of a detail record are determined by the master record.

4. Select the related object “Customer Details” and click next.

5. Next >> Next >> Save.

Note: Make sure you complete Activity 4 Before continuing.

### Creation of Lookup Field on Service records Object :

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



**Lookup Options**

Related To: **Appointment**

Child Relationship Name: **Service\_records**

Related List Label: **Service records**

What to do if the lookup record is deleted?

- Always require a value in this field in order to save a record
- Clear the value of this field. You can't choose this option if you make this field required.
- Don't allow deletion of the lookup record that's part of a lookup relationship.

6. Scroll down for Lookup Filter and click on Show filter settings.
7. Now add the filter criteria.
8. Field : Appointment: Appointment Date >> Operator : less than >> select field >> Appointment: Created Date
9. Filter type should be Required.
10. Error Message : Value does not match the criteria.
11. Enable the filter by click on Active.
12. Next >> Next >> Save.

**Lookup Filter**

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

[▼ Hide Filter Settings](#)

**Filter Criteria** [Insert Suggested Criteria](#) [Clear Filter Criteria](#)

Field	Operator	Value / Field
Appointment: Appointment Date	less than	Field <input type="button" value="Appointment: Created Date"/>
All D	Begin typing to search for a field...	None <input type="button" value="Value"/>
<a href="#">Add Filter Criteria...</a>		

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

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

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

**Active**  [Enable this filter.](#)

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

## Creation of Lookup Field on Billing details and feedback Object :

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

## Step 12: Creation of Checkbox field

### Creation of Checkbox Field on Appointment Object :

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

**SETUP > OBJECT MANAGER**

**Appointment**

**Fields & Relationships**

Details

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

**Data Type**

**None Selected** Select one of the data types below.

**Auto Number** A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

**Formula** A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

**Roll Up Summary** A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

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

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

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

**External Lookup Relationship** The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

**Checkbox** Allows users to select a True (checked) or False (unchecked) value.

**Currency** Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another application.

[Next](#) [Cancel](#)

0. Give the Field Label : Maintenance service
0. Field Name : is auto populated
0. Default value : unchecked

Step 2. Enter the details

Step 2 of 4

Field Label  

Default Value  Checked   Unchecked 

Field Name  

Description

Help Text

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

Previous Next Cancel 

0. Click on next >> next >> save.

### **Creation of Another Checkbox Field on Appointment Object :**

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

### **Creation of Checkbox Field on Service records Object :**

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

## **Step 13: Creation of Date Field**

### **Creation of Date Field on Appointment Object :**

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

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

Appointment  
New Custom Field

Help for this Page ?

Step 2. Enter the details Step 2 of 4

Field Label  

Field Name  

Description

Help Text

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

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

Default Value

Previous Next Cancel 

## Step 14: Creation of Currency Field

### Creation of Currency Field on Appointment Object :

1. Go to setup >> click on Object Manager >> type object name( Appointment ) in the search bar >> click on the object.
2. Now click on “Fields &Relationships” >> New.
3. Select “Currency” as data type and click Next.
4. Give the Field Label : Service Amount
5. Field Nme : is auto populated

Step 2. Enter the details Step 2 of 4

Field Label  

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length  Number of digits to the left of the decimal point

Decimal Places  Number of digits to the right of the decimal point

Field Name  

Description

Help Text

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

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

Previous Next Cancel

0. Click on next
0. Give read only for all the profiles in field level security for profile.
1. Click on next >> save.

Appointment  
New Custom Field

Help for this Page 

Step 3. Establish field-level security

Step 3 of 4

Previous Next Cancel

Field Label	Service Amounts	Visible	Read Only
Data Type	Currency	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Field Name	Service_Amounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Description		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.			
<b>Field-Level Security for Profile</b>		<input checked="" type="checkbox"/> Visible	<input checked="" type="checkbox"/> Read Only
Analytics Cloud Integration User		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Authenticated Website		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Authenticated Website		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Manager		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

## Creation of Currency Field on Billing details and feedback Object :

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

## Step 15: Creation of Text Field

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

Step 2. Enter the details

Step 2 of 4

Previous Next Cancel

Field Label	<input type="text" value="Vehicle number plate"/> 
Please enter the maximum length for a text field below.	
Length	<input type="text" value="10"/>
Field Name	<input type="text" value="Vehicle_number_plate"/> 
Description	<input type="text"/>
Help Text	<input type="text"/>
Required	<input checked="" type="checkbox"/> Always require a value in this field in order to save a record
Unique	<input checked="" type="checkbox"/> Do not allow duplicate values
	<input checked="" type="radio"/> Treat "ABC" and "abc" as duplicate values (case insensitive)
	<input type="radio"/> Treat "ABC" and "abc" as different values (case sensitive)
External ID	<input type="checkbox"/> Set this field as the unique record identifier from an external system
Auto add to custom report type	<input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity 

0. Click on next >> next >> save.

## Creation of Text Fields in Billing details and feedback object :

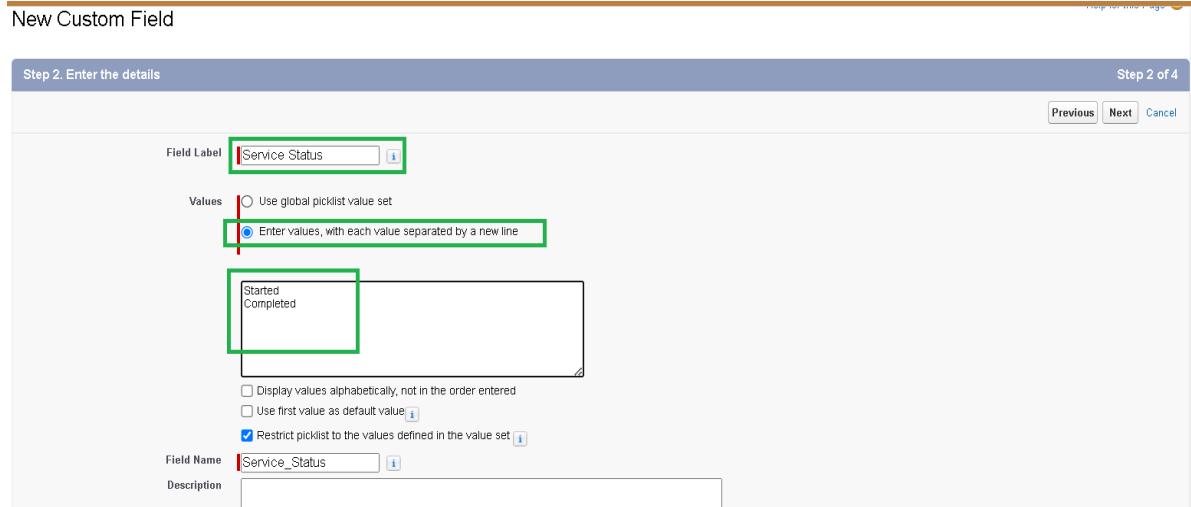
1. Go to setup >> click on Object Manager >> type object name( Billing details and feedback ) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select “text” as data type and click Next.
4. Give the Field Label : Rating for service
5. Field Name : is auto populated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

## Step 16: Creation of Picklist

### Creation of Picklist Fields in Service records object :

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

New Custom Field



Step 2. Enter the details

Step 2 of 4

Previous Next Cancel

Field Label: Service Status

Values:

- Use global picklist value set
- Enter values, with each value separated by a new line

Started  
Completed

Display values alphabetically, not in the order entered

Use first value as default value

Restrict picklist to the values defined in the value set

Field Name: Service\_Status

Description:

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

### Creation of Picklist Fields in Billing details and feedback object :

1. Go to setup >> click on Object Manager >> type object name(Billing details and feedback) in search bar >> click on the object.
2. Click on fields &relationship >> click on New.
3. Select Data type as “Picklist” and click Next.

4. Enter Field Label as “Payment Status”, under values select “Enter values, with each value separated by a new line” and enter values as shown below.
5. The values are: Pending, Completed.
6. Click Next.
7. Next >> Next>> Save.

## Step 17: Creation of Formula Field in Service Records Object

1. Go to setup >> click on Object Manager >> type object name(Service records) in search bar >> click on the object.
2. Click on fields &relationship >> click on New.
3. Select Data type as “Formula” and click Next.
4. Give Field Label and Field Name as “service date” and select formula return type as “Date” and click next.

Step 2. Choose output type

Step 2 of 5

Field Label  Field Name  

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

**Formula Return Type**

None Selected Select one of the data types below.

Checkbox Calculate a boolean value  
Example: `TODAY() > CloseDate`

Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.  
Example: `Gross Margin = Amount - Cost__c`

Date Calculate a date, for example, by adding or subtracting days to other dates.  
Example: `Reminder Date = CloseDate - 7`

Date/Time Calculate a date/time, for example, by adding a number of hours or days to another date/time.  
Example: `Next = NOW() + 1`

[Previous](#) [Next](#) [Cancel](#)

5. Insert field formula should be :CreatedDate

Insert Field

Select a field, then click Insert. Labels followed by a ">" indicate that there are more fields available.

<input type="text" value="Service records &gt;"/> <ul style="list-style-type: none"> <li>\$Api &gt;</li> <li>\$Label &gt;</li> <li>\$Organization &gt;</li> <li>\$Profile &gt;</li> <li>\$System &gt;</li> <li>\$User &gt;</li> <li>\$UserRole &gt;</li> </ul>	<ul style="list-style-type: none"> <li>Appointment</li> <li>Appointment &gt;</li> <li>Created By &gt;</li> <li>Created By ID</li> <li><b>Created Date</b></li> <li>Last Activity Date</li> <li>Last Modified By &gt;</li> <li>Last Modified By ID</li> <li>Last Modified Date</li> </ul>	<p>You have selected: <b>CreatedDate</b></p> <p>Type: Date/Time API Name: CreatedDate</p> <p><b>Insert</b></p>
--	--	--

**Close**

Step 3. Enter formula

Step 3 of 5

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: [Reminder Date = CloseDate - 7](#) [More Examples...](#)

[Simple Formula](#) [Advanced Formula](#)

[Insert Field](#) [Insert Operator](#)

**service dates (Date)=** [CreatedDate](#)

Functions

-- All Function Categories --

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII

Quick Tips

- Getting Started
- Operators & Functions

6. click “Check Syntax” .
7. Click next >> next >> Save.

## Step 18: Validation Rule

### To create a validation rule to an appointment Object

1. Go to the setup page >> click on object manager >> From drop down click edit for Appointment object.
2. Click on the validation rule >> click New.

SETUP > OBJECT MANAGER  
Appointment

[Validation Rules](#)

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Vehicle	Vehicle number plate	Please enter valid number	✓	project 2, 25/09/2023, 11:56 am

[New](#)

3. Enter the Rule name as “ Vehicle ”.
4. Insert the Error Condition Formula as : -

NOT(REGEX( Vehicle\_number\_plate\_\_c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))

Validation Rule Edit

Save Save & New Cancel

Rule Name

Active

Description vehicle

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](#) [Insert Operator](#)

**NOT (REGEX( Vehicle\_number\_plate\_\_c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))**

Functions

-- All Function Categories --

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

[Insert Selected Function](#)

ABS(number)  
Returns the absolute value of a number, a number without its sign

[Check Syntax](#)

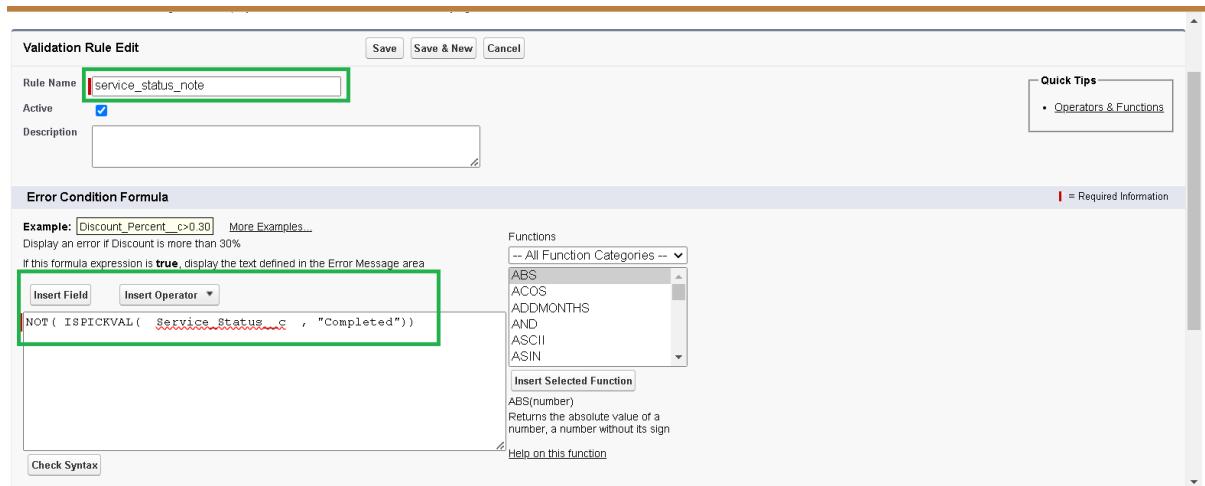
5. Enter the Error Message as “Please enter validnumber”, select the Error location as Field and select the field as “Vehicle number plate”, and click Save.



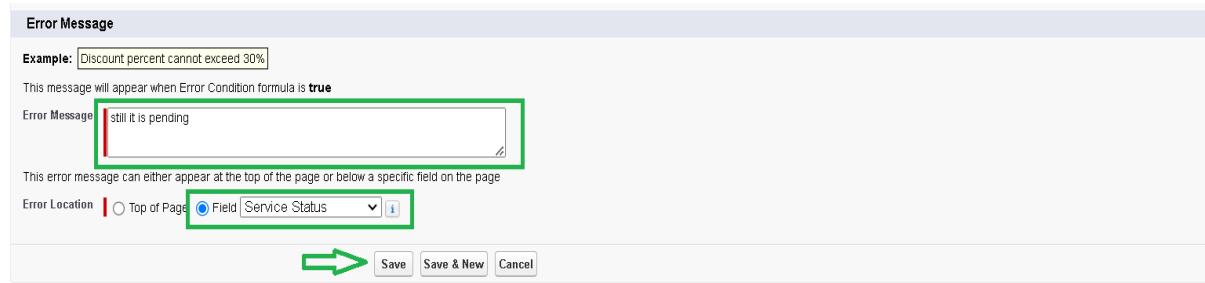
## To create a validation rule to an Service records Object

1. Go to the setup page >> click on object manager >> From drop down click edit for Service records object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as “ service\_status\_note ”.
4. Insert the Error Condition Formula as :-

NOT( ISPICKVAL( Service\_Status\_\_c , "Completed"))



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



## To create a validation rule to an Billing details and feedback Object

1. Go to the setup page >> click on object manager >> From drop down click edit for Billing details and feedback object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as “ rating\_should\_be\_less\_than\_5”.
4. Insert the Error Condition Formula as : -

NOT( REGEX( Rating\_for\_service\_\_c , "[1-5]{1}" ))

0. Enter the Error Message as “rating should be from 1 to 5”, select the Error location as Field and select the field as “Rating for Service”, and click Save.

## Step 19: Duplication Rule

### To create a matching rule to an Customer details Object

1. Go to quick find box in setup and search for matching Rule.
2. Click on matching rule >> click on New Rule.

- Select the object as Customer details and click Next.

Matching Rule  
New Matching Rule

Help for this Page ?

Step 1 of 2

Object: Customer Details

Next Cancel

Up arrow

Next Cancel

- Give the Rule name : Matching customer details
- Unique name : is auto populated
- Define the matching criteria as
 

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

Save Cancel

Rule Details

Object: Customer Details  
Rule Name: matching Customer details  
Unique Name: matching\_Customer\_det  
Description:

Matching Criteria

Tell the rule which fields to compare and how.

Field: Gmail	Matching Method: Exact	Match Blank Fields: AND
Field: Phone Number	Matching Method: Exact	Match Blank Fields: AND
--None--	Exact	AND
--None--	Exact	AND
--None--	Exact	AND

Add Filter Logic... Save Cancel

Matching Rule  
matching Customer details

Help for this Page ?

Matching Rule Detail

Edit Delete Clone Activate

Object: Customer Details  
Rule Name: matching Customer details  
Unique Name: matching\_Customer\_details  
Description:  
Matching Criteria: (Customer\_Details: Gmail EXACT MatchBlank = FALSE) AND (Customer\_Details: Phone\_Number EXACT MatchBlank = FALSE)  
Status: Inactive  
Created By: project2, 25/09/2023, 10:15 am  
Modified By: project2, 10/10/2023, 3:32 pm

## To create a Duplicate rule to an Customer details Object

- Go to quick find box in setup and search for Duplicate rules.
- Click on Duplicate rule >> click on New Rule >> select customer details object.

Dupli

▼ Data

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

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

## All Duplicate Rules

What Are Duplicate Rules?

View: All Duplicate Rules

Role Name	Description	Matching Rule	Active	Last Modified By	Last Modified Date
Customer Detail duplicate	Identify accounts that duplicate other accounts.	Standard Account Matching Rule	<input type="checkbox"/>	b2	10/10/2023
Standard Contact Duplicate Rule	Identify contacts that duplicate other contacts and leads.	Standard Contact Matching Rule	<input checked="" type="checkbox"/>	b2	24/09/2023
Standard Lead Duplicate Rule	Identify leads that duplicate other leads and contacts.	Standard Lead Matching Rule	<input checked="" type="checkbox"/>	b2	24/09/2023
Environment		Standard Environment Matching Rule	<input checked="" type="checkbox"/>	b2	24/09/2023
Individual		Standard Individual Matching Rule	<input checked="" type="checkbox"/>	b2	24/09/2023
Laptop		Standard Laptop Matching Rule	<input checked="" type="checkbox"/>	b2	24/09/2023
Lead		Standard Lead Matching Rule	<input checked="" type="checkbox"/>	b2	24/09/2023

0. Give the Rule name as : Customer Detail duplicate
0. Scroll a little in Matching rule section
0. Select the matching rule : Matching customer details
0. And Click on save.
0. After saving the Duplicate Rule, Click on Activate.

Edit Duplicate Rule  
Customer Detail duplicate

Help for this Page ?

Duplicate Rule Edit

Save Save & New Cancel

I = Required Information

### 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  Alert  Report

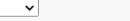
Action On Edit: Allow  Alert  Report

Alert Text: Use one of these records? 

### Matching Rules

Define how duplicate records are identified.

Compare Customer Details With: Customer Details 

Matching Rule: matching Customer details 

Matching Criteria: (Customer Details: Gmail EXACT MatchBlank = FALSE) AND (Customer Details: Phone\_Number EXACT MatchBlank = FALSE)

Field Mapping:  Mapping Selected

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... 

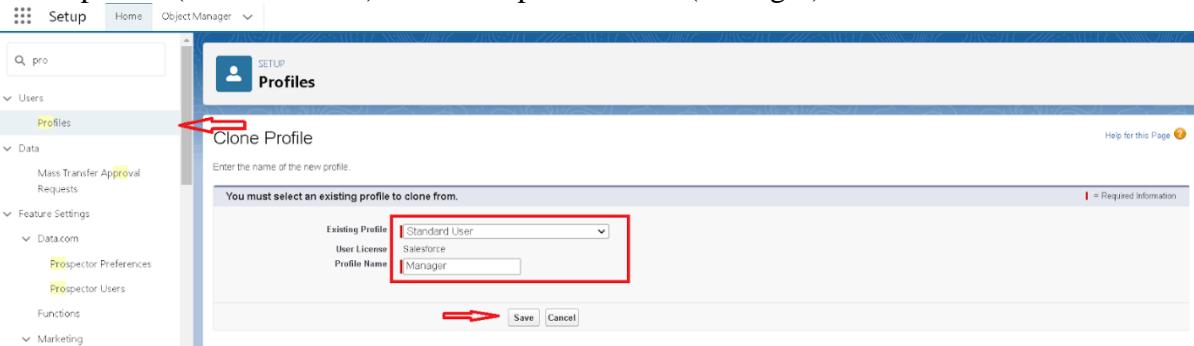
Save Save & New Cancel 

## Step 20: Profiles

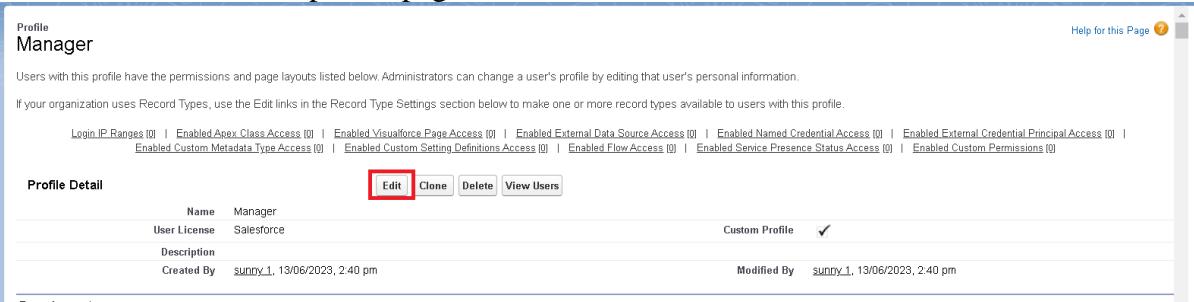
### Manager Profile

To create a new profile:

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



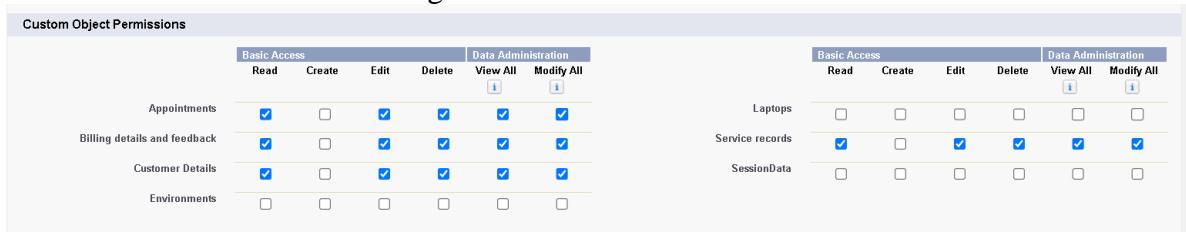
0. While still on the profile page, then click Edit.



0. Select the Custom App settings as default for the Garage management.



0. 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.



0. Changing the session times out after should be “ 8 hours of inactivity”.
0. Change the password policies as mentioned :
0. User passwords expire in should be “ never expires ”.
0. Minimum password length should be “ 8 ”, and click save.

## Sales Person Profile

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

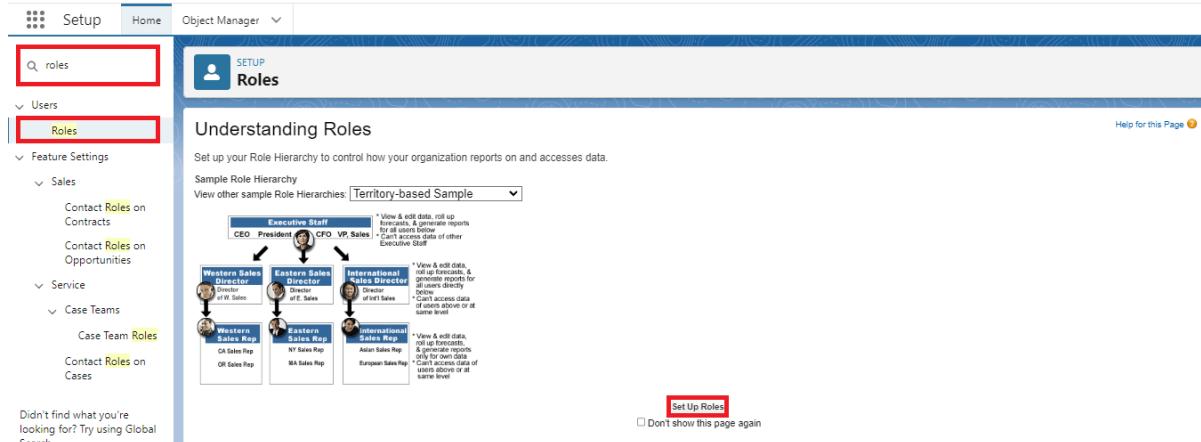
Custom Object Permissions									
	Basic Access				Data Administration				
	Read	Create	Edit	Delete	View All	Modify All			
Appointments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
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 checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
SessionData	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			

0. And click save.

## Step 21: Role & Role Hierarchy

### Creating Manager Role:

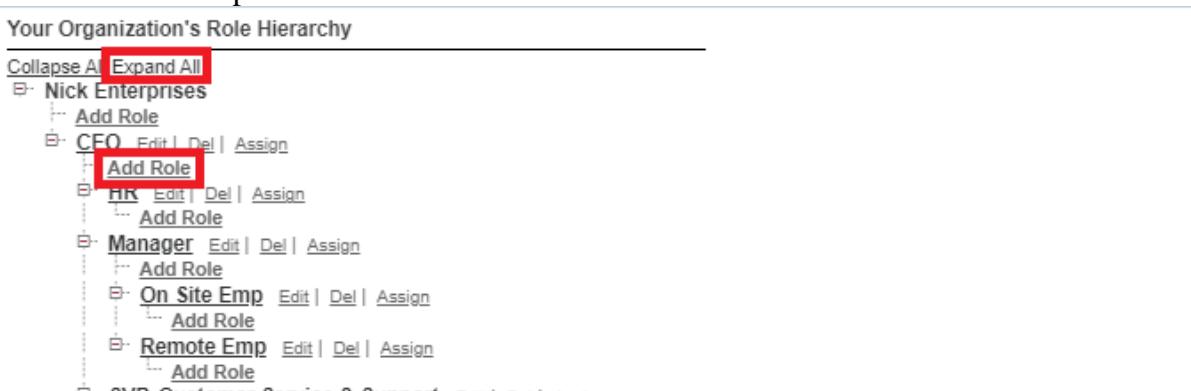
1. Go to quick find >> Search for Roles >> click on set up roles.



The screenshot shows the Salesforce Setup interface. The top navigation bar has 'Setup' selected. On the left, there's a sidebar with 'Users' and 'Roles' highlighted with red boxes. The main content area is titled 'Understanding Roles' and contains a 'Sample Role Hierarchy' diagram. The diagram shows a hierarchy from 'Executive Staff' (CEO, President, CFO, VP, Sales) down to 'International Sales Reps' (Western Sales Director, Eastern Sales Director, International Sales Director, Western Sales Rep, NY Sales Rep, MA Sales Rep, Asian Sales Rep, European Sales Rep). A legend explains the role levels: 
 

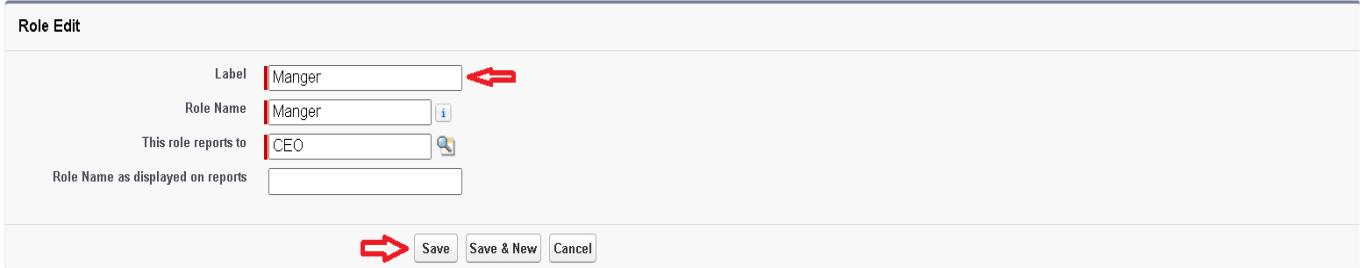
- Executive Staff: View & edit data, roll up forecasts & reports for all users below them, can access data of other Executive Staff.
- Manager: View & edit data, roll up forecasts & reports only for own data.
- Supervisor: View & edit data, roll up forecasts & reports only for own data and for all users above or at same level.
- Rep: Can access data of all users above or at same level.
- Guest: Can't access data of other users.

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



The screenshot shows the 'Your Organization's Role Hierarchy' page. At the top, there's a 'Collapse All' and 'Expand All' button, with 'Expand All' highlighted with a red box. The tree view shows a hierarchy starting from 'Nick Enterprises' down to specific roles like 'HR', 'Manager', 'On Site Emp', and 'Remote Emp', each with an 'Add Role' button next to it.

0. Give Label as “Manager” and Role name gets auto populated. Then click on Save.

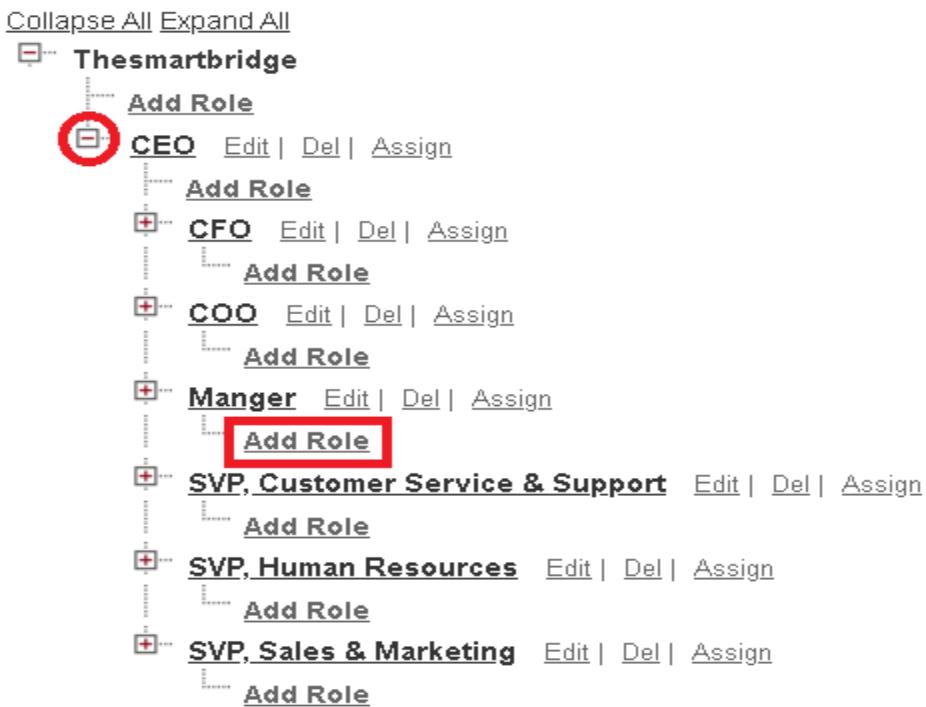


The screenshot shows the 'Role Edit' page. It has four input fields: 'Label' (containing 'Manger'), 'Role Name' (containing 'Manger'), 'This role reports to' (containing 'CEO'), and 'Role Name as displayed on reports' (empty). Below the fields are three buttons: a red double-headed arrow icon, 'Save' (disabled), 'Save & New' (disabled), and 'Cancel'. A red arrow points to the 'Label' field.

## Creating Another Roles

Creating another two roles under manager

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



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

## Step 22: Users

### Create User

1. Go to setup >> type users in quick find box >> select users >> click New user.
2. Fill in the fields
1. First Name : Niklaus

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

New User

User Edit Save Save & New Cancel

General Information

First Name	Niklaus
Last Name	Mikaelson
Alias	Rmika
Email	
Username	Mikaelson@Niklaus
Nickname	Rik
Title	
Company	
Department	
Division	

Role: Manager User License: Salesforce Profile: Manager

Active:

Marketing User

Offline User

Knowledge User

Flow User

Service Cloud User

Site.com Contributor User

Site.com Publisher User

WDC User

Data.com User Type: --None-- Help for this Page

0. Save.

## Creating Another Users

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

Note :create atleast 3 users with these permissions.

## Step 23: Public Group

### Creating New Public Group

1. Go to setup >> type users in quick find box >> select public groups >> click New.

public groups

SETUP Public Groups

Users Public Groups

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

Public Groups

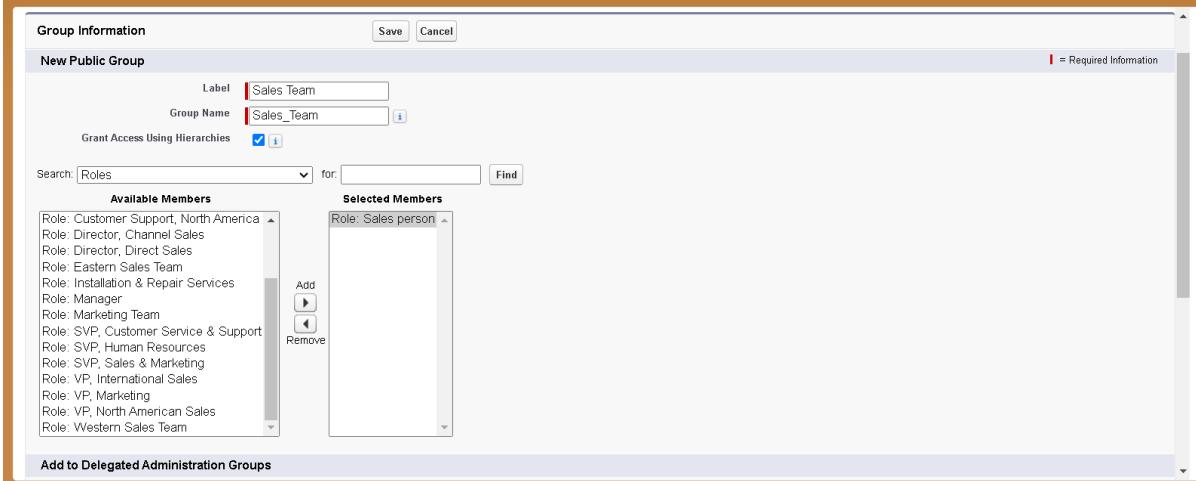
A public group is a set of users. It can contain individual users, other groups, the users in a particular role or territory, or the users in a role or territory plus all of the users below that role or territory in the hierarchy.

View: All Edit Create New View Help for this Page

Label	Group Name	Created By	Created Date
No records to display			

0. Give the Label as “sales team”.

0. Group name is autopopulated.
0. Search for Roles.
0. In Available Members select Sales person and click on add it will be moved to selected member.
0. Click on save.



Group Information

New Public Group

Label: Sales Team

Group Name: Sales\_Team

Grant Access Using Hierarchies

Search: Roles for: Find

**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**

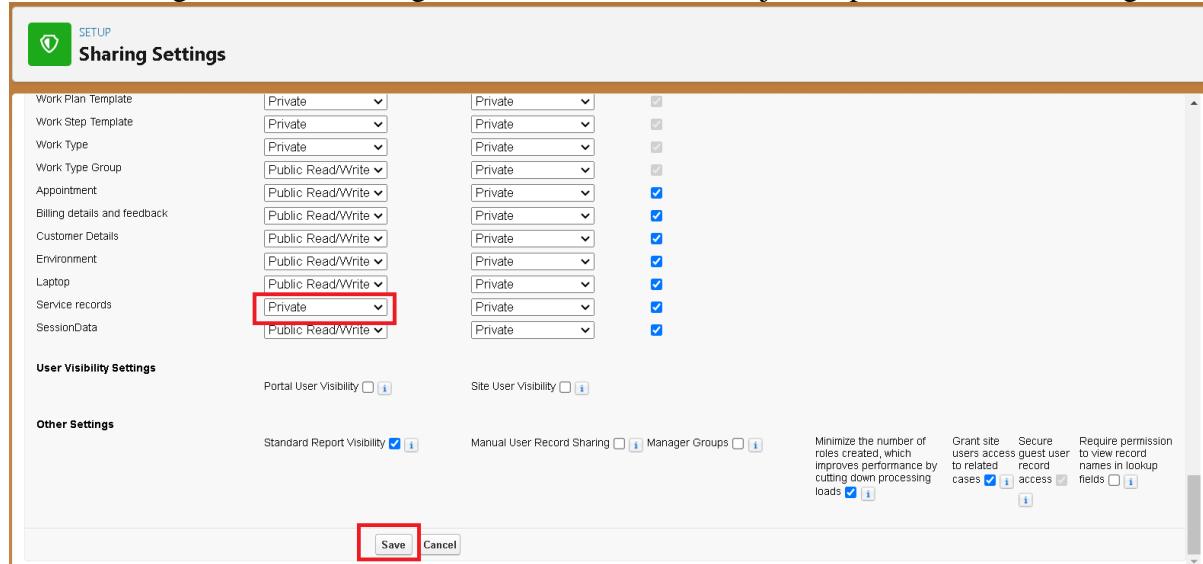
- Role: Sales person

Add to Delegated Administration Groups

## Step24 : Sharing Setting

### 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.



SETUP

Sharing Settings

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

User Visibility Settings

Portal User Visibility  Site User Visibility

Other Settings

Standard Report Visibility  Manual User Record Sharing  Manager Groups

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

Save Cancel

0. Click on save and refresh.
0. Scroll down a bit, Click new on Service records sharing Rules.

0.



Service records Sharing Rules

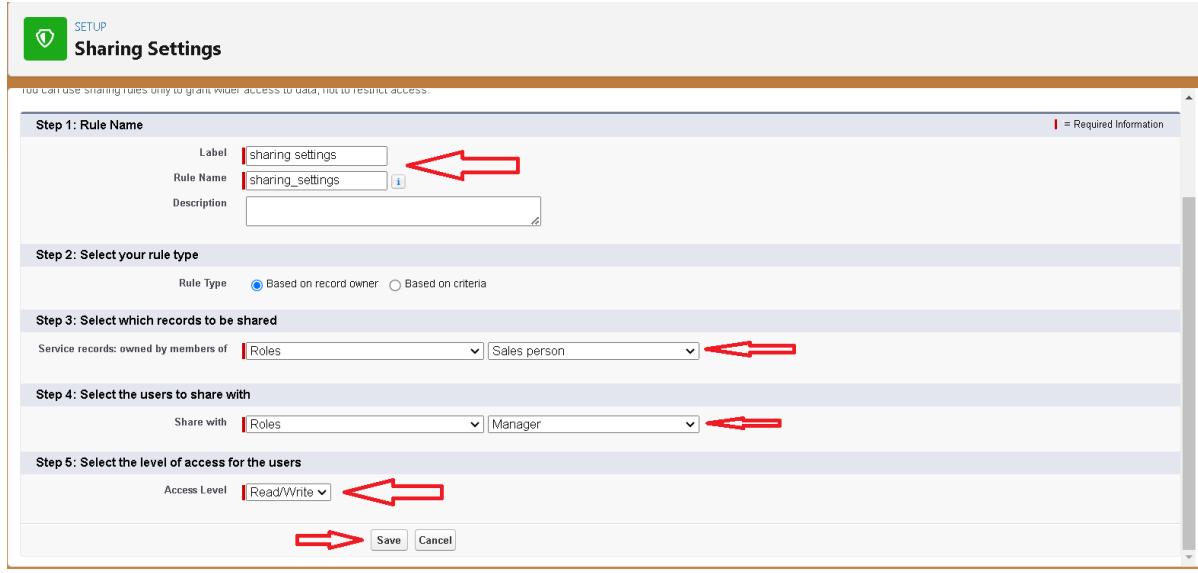
→ New Recalculate

No sharing rules specified.

Service records Sharing Rules Help ?

0. Give the Label name as " Sharing setting"

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



The screenshot shows the 'Sharing Settings' setup page. It consists of five steps:

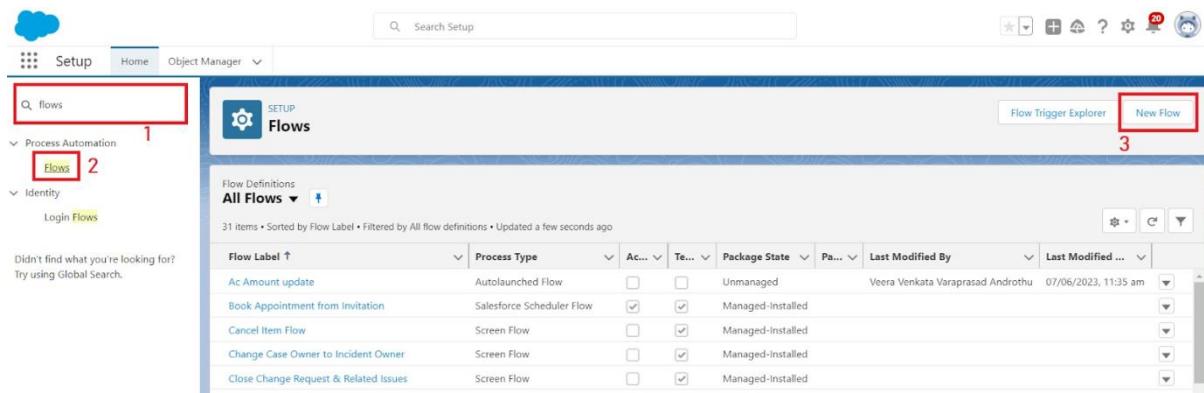
- Step 1: Rule Name**: Fields include Label (sharing settings), Rule Name (sharing\_settings), and Description. A red arrow points to the Rule Name field.
- Step 2: Select your rule type**: Rule Type is set to 'Based on record owner'.
- Step 3: Select which records to be shared**: Service records: owned by members of 'Roles' (with 'Sales person' selected). A red arrow points to the 'Sales person' dropdown.
- Step 4: Select the users to share with**: Share with 'Roles' (with 'Manager' selected). A red arrow points to the 'Manager' dropdown.
- Step 5: Select the level of access for the users**: Access Level is set to 'Read/Write'. A red arrow points to the 'Read/Write' dropdown.

At the bottom right are 'Save' and 'Cancel' buttons, with a red arrow pointing to the 'Save' button.

## Step 25: Flows

### Create a flow

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



The screenshot shows the Salesforce Setup page with the following interface elements:

- Left Navigation Bar**: Shows 'Q. flows' (1) under 'Process Automation' and 'Flows' (2).
- Search Bar**: 'Search Setup'.
- Top Right Buttons**: Standard setup buttons.
- Flow Trigger Explorer**: Shows 'New Flow' (3).
- Flows List View**: Shows a table of flow definitions:
 

Flow Label	Process Type	Ac...	Te...	Package State	Pa...	Last Modified By	Last Modified ...
Ac Amount update	Autolaunched Flow	<input type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Veera Venkata Varaprasad Androthu	07/06/2023, 11:35 am
Book Appointment from Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Change Case Owner to Incident Owner	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			
Close Change Request & Related Issues	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			

0. Select the Record-triggered flow and Click on Create.

## New Flow

Core All + Templates

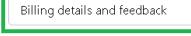
Screen Flow 	Record-Triggered Flow  1
Schedule-Triggered Flow 	Platform Event—Triggered Flow 
Autolaunched Flow (No Trigger) 	Record-Triggered Orchestration 

2 

0. Select the Object as “Billing details and feedback” in the Drop down list.
0. Select the Trigger Flow when: “A record is Created or Updated”.
0. Select the Optimize the flow for: “Actions and Related Records” and Click on Done.

Configure Start

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

\*Object 

Configure Trigger  
\*Trigger the Flow When:  
 A record is created  
 A record is updated  
 A record is created or updated  
 A record is deleted 

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

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

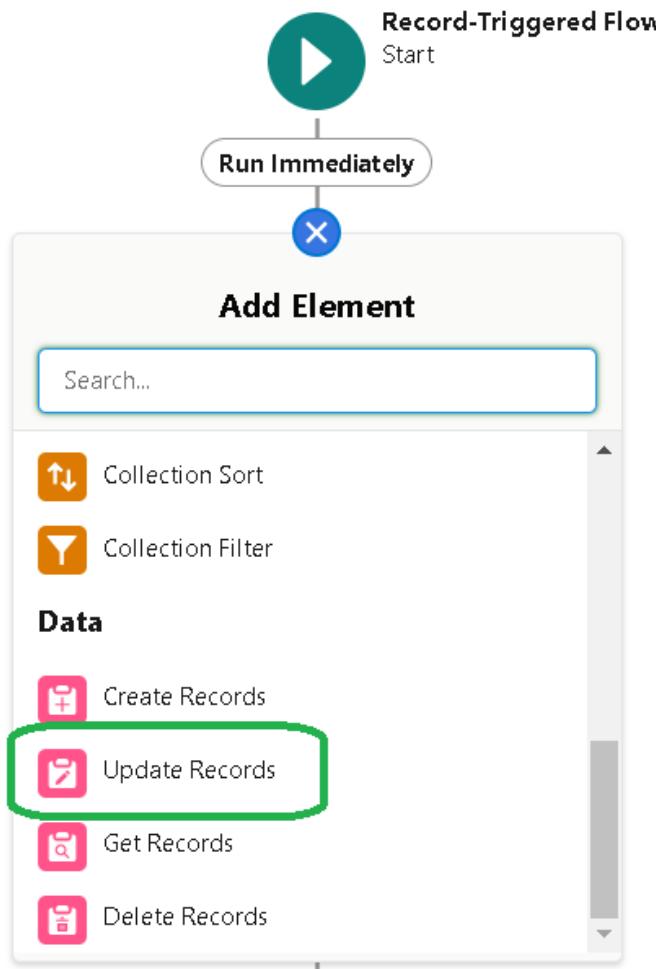
Condition Requirements  
None

\*Optimize the Flow for:  
Fast Field Updates  
Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.  
Actions and Related Records  
Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database. 3

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

4 

0. Under the Record-triggered Flow Click on “+” Symbol and In the Drop down List select the “Update records Element”.



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

## Edit Update Records

Update Salesforce records using values from the flow.

*Label	*API Name
Amount Update	Amount_Update
Description	
<p><b>*How to Find Records to Update and Set Their Values</b></p> <ul style="list-style-type: none"> <li><input checked="" type="radio"/> Use the billing details and feedback record that triggered the flow</li> <li><input type="radio"/> Update records related to the billing details and feedback record that triggered the flow</li> <li><input type="radio"/> Use the IDs and all field values from a record or record collection</li> <li><input type="radio"/> Specify conditions to identify records, and set fields individually</li> </ul>	

**Set Filter Conditions**

Condition Requirements to Update Record

All Conditions Are Met (AND)

Cancel Done

**Set Filter Conditions**

Condition Requirements to Update Record

All Conditions Are Met (AND)

Field	Operator	Value
Payment_Status__c	Equals	Completed

+ Add Condition

**Set Field Values for the Billing details and feedback Record**

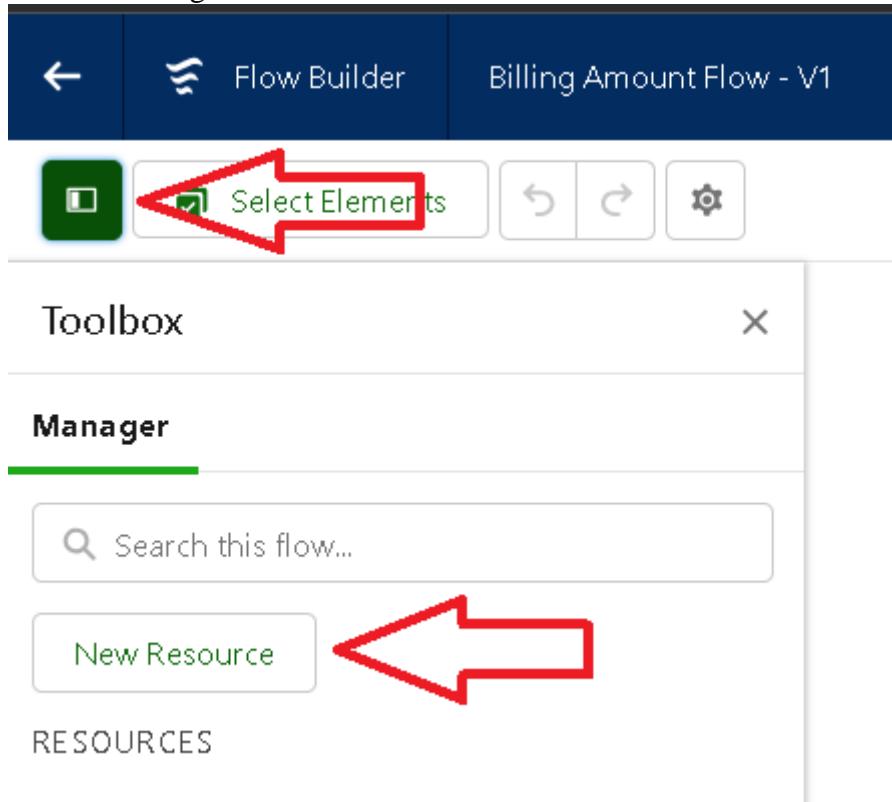
Field	Value
Payment_Paid__c	\$Record > Service records > Appointment > Service A... X

+ Add Field

Cancel Done

0. Set a filter condition : All Conditions are met(AND)
0. Field : Payment\_Status\_\_c
0. Operator : Equals
0. Value : Completed
0. And Set Field Values for the Billing details and feedback Record
0. Field : Payment\_Paid\_\_c
0. Value : {\$Record.Service\_records\_\_r.Appointment\_\_r.Service\_Amount\_\_c}
0. Click On Done.

0. Before creating another Element. Create a New Resource form Toolbox form top left.



0. Click on the New Resource, And select Variable.
0. Select the resource type as text template.
0. Enter the API name as “alert”.
0. Change the view as Rich Text ? View to Plain Text.
0. In body field paste the syntax that given below.

Dear {!\$Record.Service\_records\_\_r.Appointment\_\_r.Customer\_Name\_\_r.Name},

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

Amount paid : {!\$Record.Payment\_Paid\_\_c}  
 Thank you for Coming .

0. Click done.

**Edit Text Template**

*API Name	<input type="text" value="alert"/>
Description	<input type="text"/>
*Body	<input type="text" value="Insert a resource..."/> <span style="margin-left: 20px;">View as Plain Text ▾</span>
<pre>Dear {!\$Record.Service_records__r.Appointment__r.Customer_Name__r.Name},</pre>	
<span style="border: 1px solid red; padding: 2px;">Cancel</span> <span style="background-color: green; color: white; border: 1px solid green; padding: 2px;">Done</span>	

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

### Edit Action

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.

*Label	*API Name
Email Alert	Email_Alert
Description	
<div style="height: 60px; border: 1px solid #ccc; margin-bottom: 10px;"></div>	

Set Input Values for the Selected Action

A_a Body <small>i</small>	{!alert}	<input checked="" type="checkbox"/> Include <input type="checkbox"/> Don't Include
A_a Email Template ID		<input type="checkbox"/> Don't Include
A_a Log Email on Send		<input type="checkbox"/> Don't Include

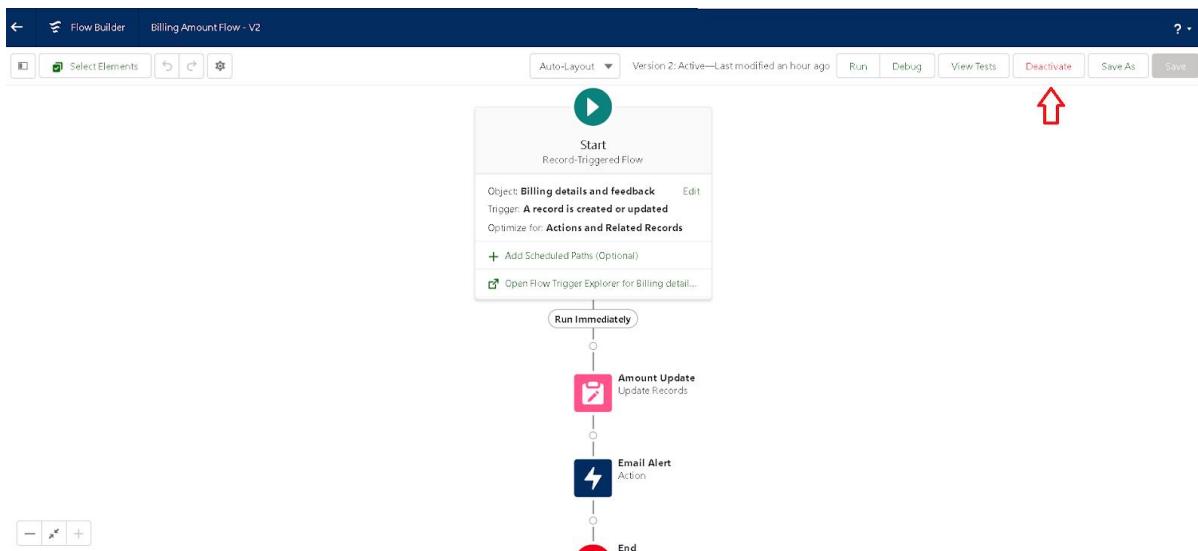
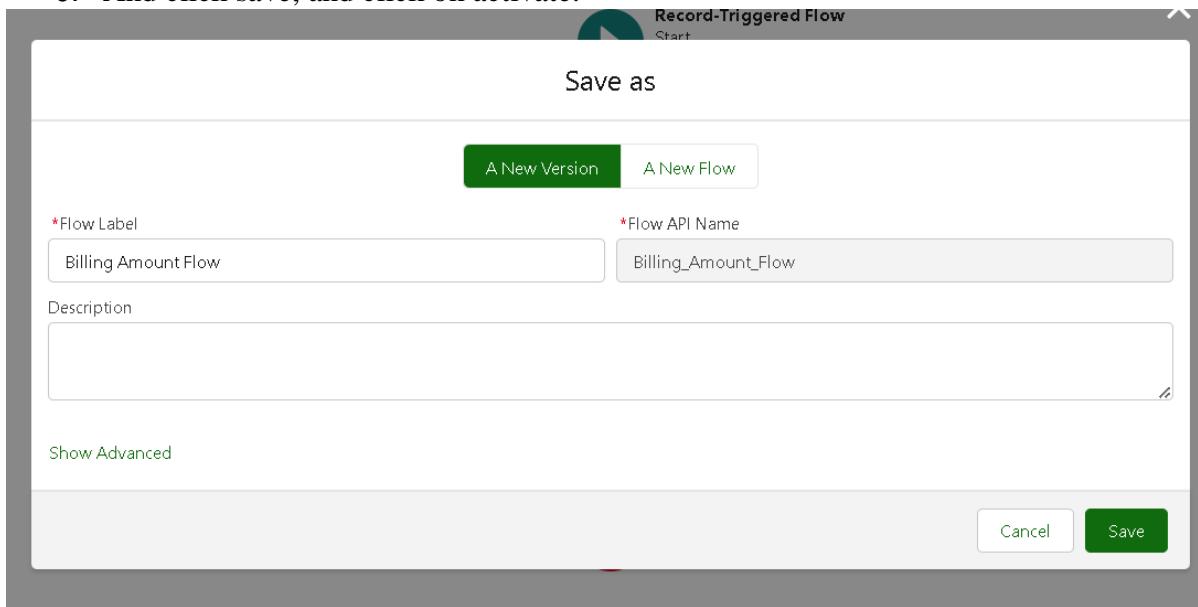
### Edit Action

A_a Recipient Address List <small>i</small>	{!\$Record.Service_records__r.Appointment__r.Cus}	<input checked="" type="checkbox"/> Include <input type="checkbox"/> Don't Include
A_a Recipient ID		<input type="checkbox"/> Don't Include
A_a Related Record ID		<input type="checkbox"/> Don't Include
A_a Rich-Text-Formatted Body		<input type="checkbox"/> Don't Include
A_a Sender Email Address		<input type="checkbox"/> Don't Include
A_a Sender Type		<input type="checkbox"/> Don't Include
A_a Subject <small>i</small>	Thank You for Your Payment - Garage Manageme	<input checked="" type="checkbox"/> Include <input type="checkbox"/> Don't Include

Cancel Done

- Click on save. Give the Flow label , Flow API name will be autopopulated.

- And click save, and click on activate.



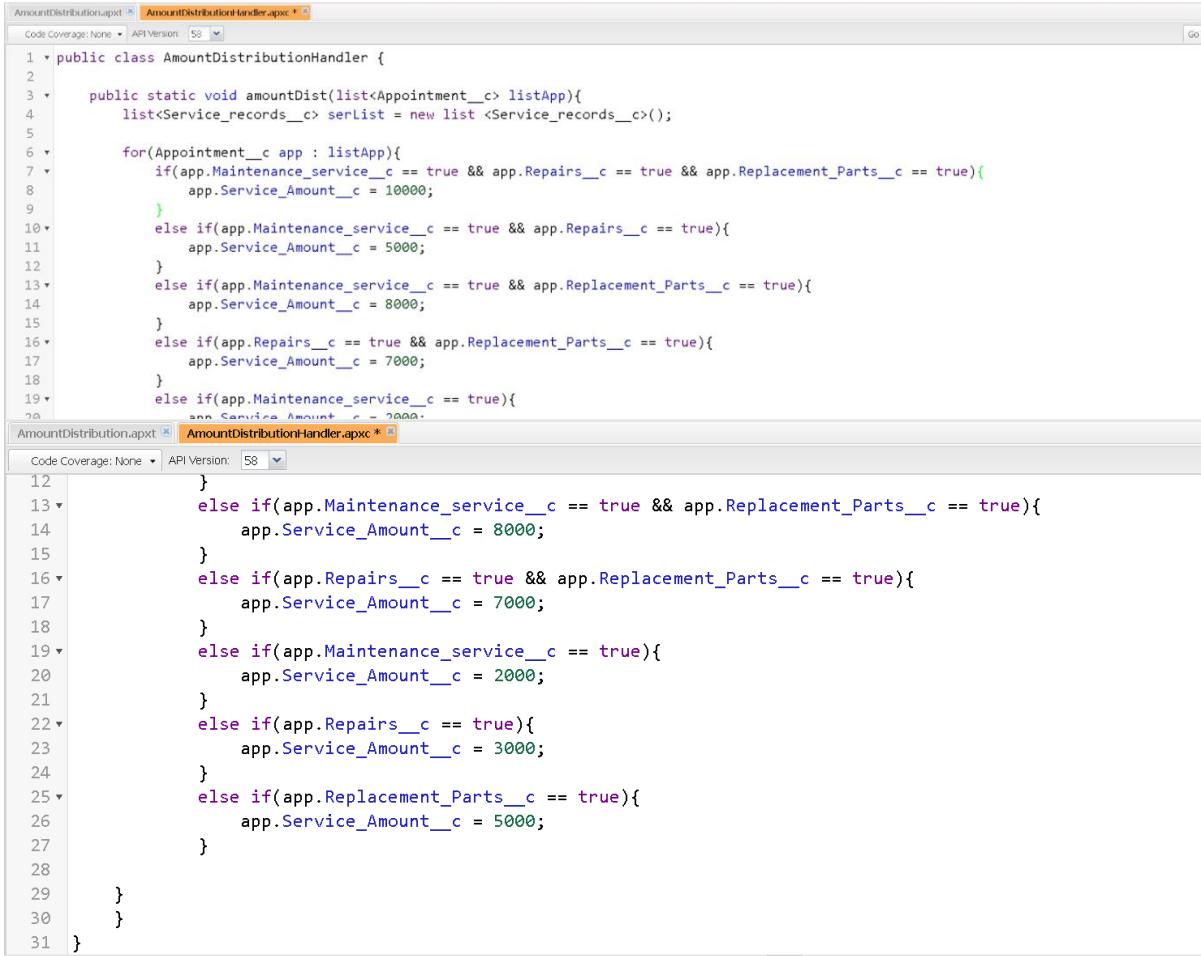
## Step 26: Apex Trigger

### Apex Handler

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

- Login to the respective trailhead account and navigate to the gear icon in the top right corner.
- Click on the Developer console. Now you will see a new console window.

3. In the toolbar, you can see FILE. Click on it and navigate to new and create New apex class.
4. Name the class as “AmountDistributionHandler ”.



```

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

```

Code:

```

public class AmountDistributionHandler {

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

    for(Appointment__c app : listApp){
      if(app.Maintenance_service__c == true && app.Repairs__c == true &&
app.Replacement_Parts__c == true){
        app.Service_Amount__c = 10000;
      }
      else if(app.Maintenance_service__c == true && app.Repairs__c == true){
        app.Service_Amount__c = 5000;
      }
      else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
        app.Service_Amount__c = 8000;
      }
    }
  }
}

```

```

else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
    app.Service_Amount__c = 7000;
}
else if(app.Maintenance_service__c == true){
    app.Service_Amount__c = 2000;
}
else if(app.Repairs__c == true){
    app.Service_Amount__c = 3000;
}
else if(app.Replacement_Parts__c == true){
    app.Service_Amount__c = 5000;
}

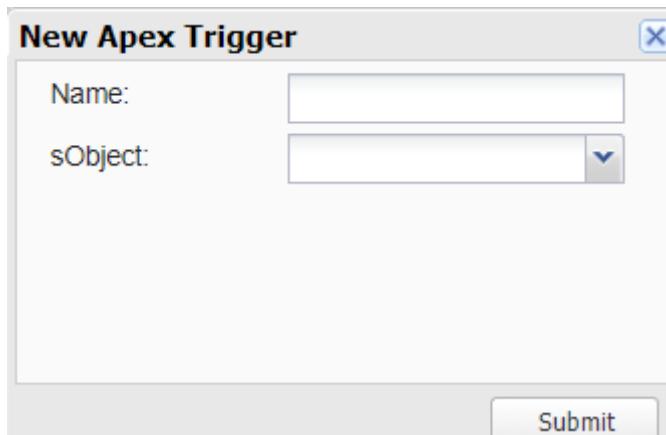
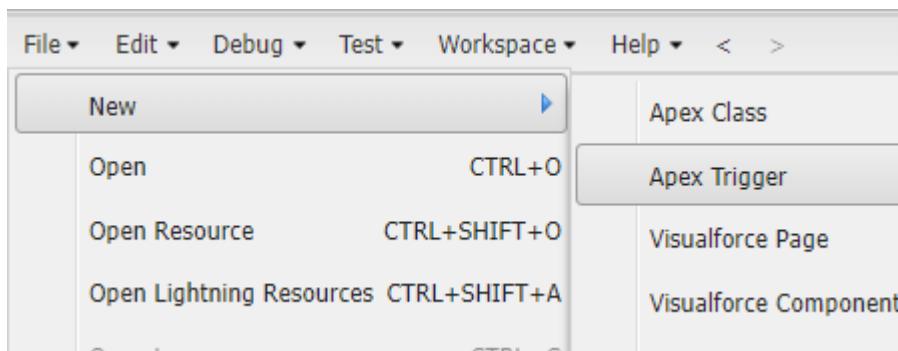
}
}
}

```

Trigger Handler :

How to create a new trigger :

1. While still in the trailhead account, navigate to the gear icon in the top right corner.
2. Click on developer console and you will be navigated to a new console window.
3. Click on File menu in the tool bar, and click on new? Trigger.
4. Enter the trigger name and the object to be triggered.
5. Name : AmountDistribution
6. sObject : Appointment\_\_c



Syntax For creating trigger :

The syntax for creating trigger is :

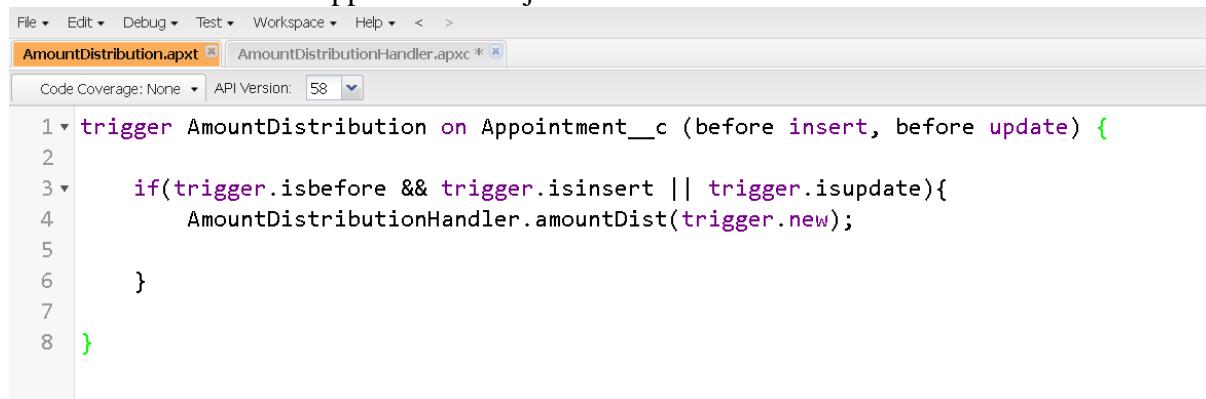
Trigger [trigger name] on [object name]( Before/After event)

{

}

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

## 1. Handler for the Appointment Object



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

Code:

```
trigger AmountDistribution on Appointment__c (before insert, before update) {
```

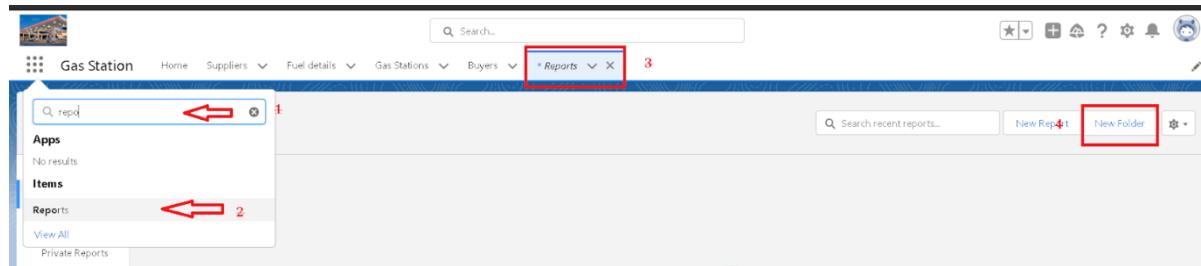
```
    if(trigger.isbefore && trigger.isinsert || trigger.isupdate){
        AmountDistributionHandler.amountDist(trigger.new);
    }
```

```
}
```

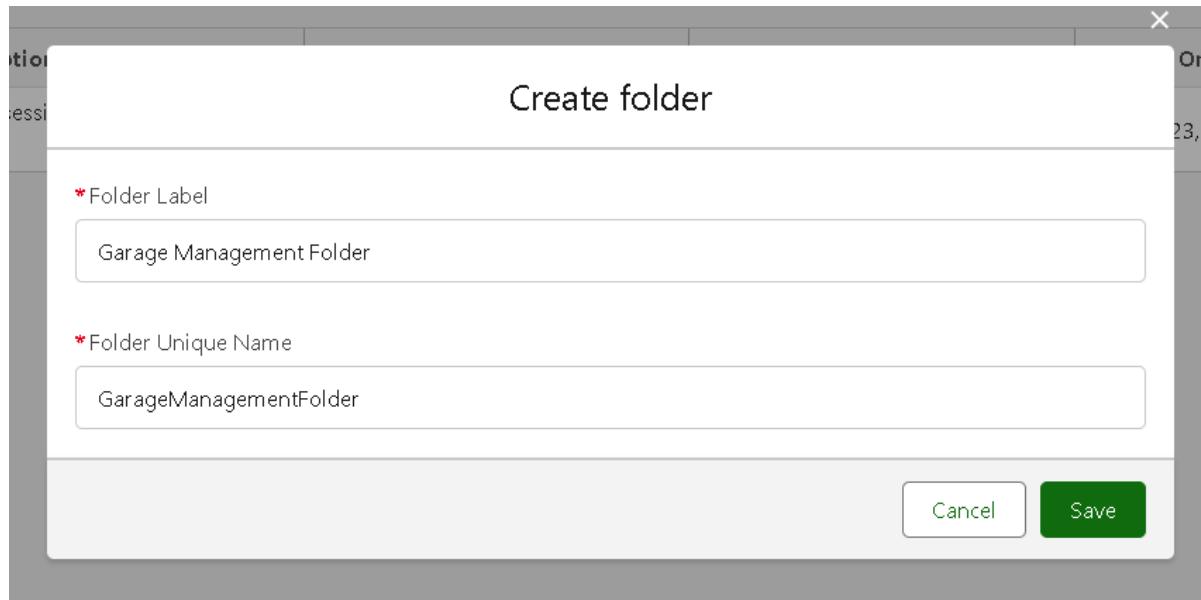
## Step 27 : Reports

### 1.create a report folder

1. Click on the app launcher and search for reports.
2. Click on the report tab, click on new folder.

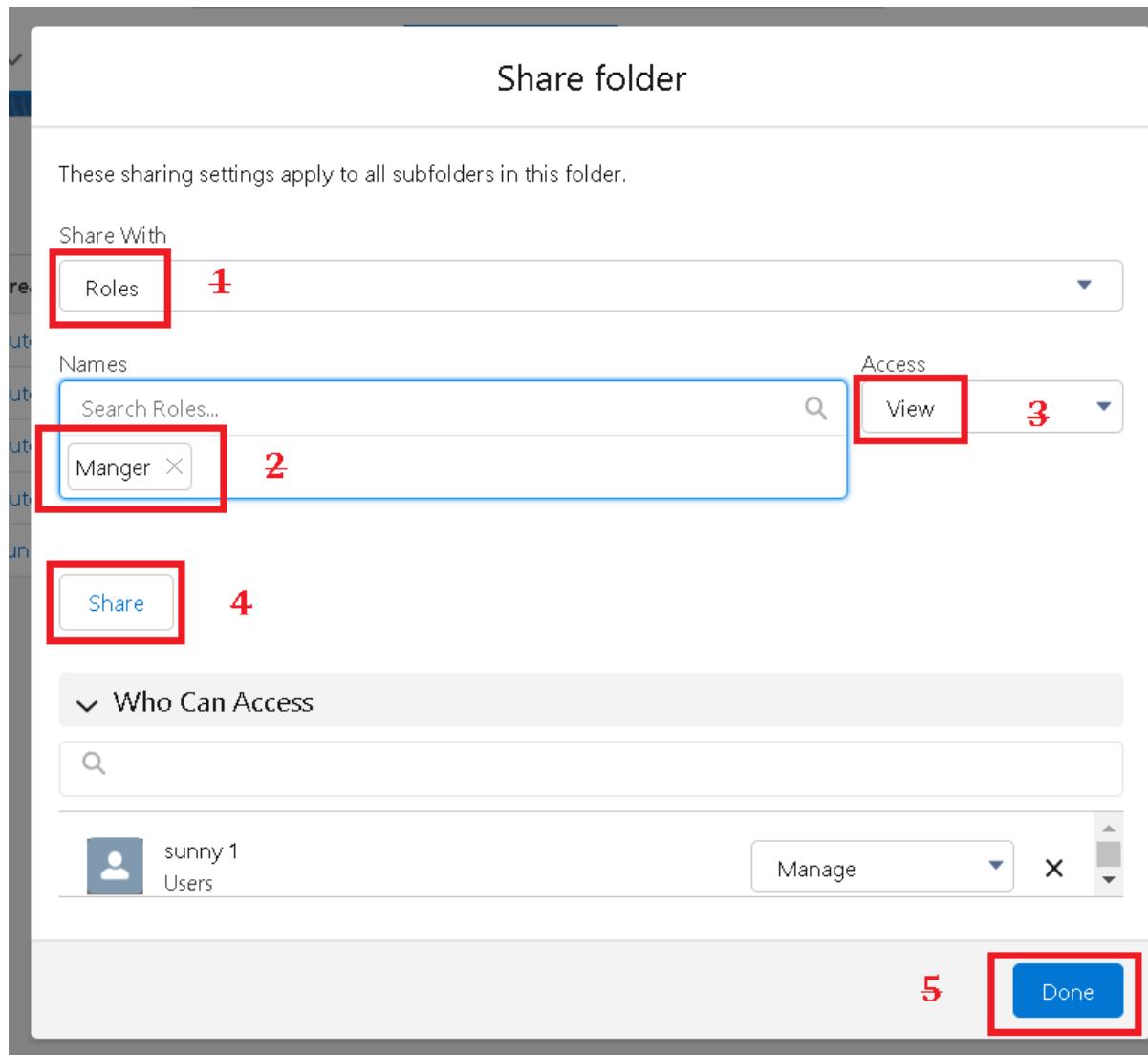


0. Give the Folder label as “Garage Management Folder”, Folder unique name will be auto populated.
0. Click save.



## 2.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.



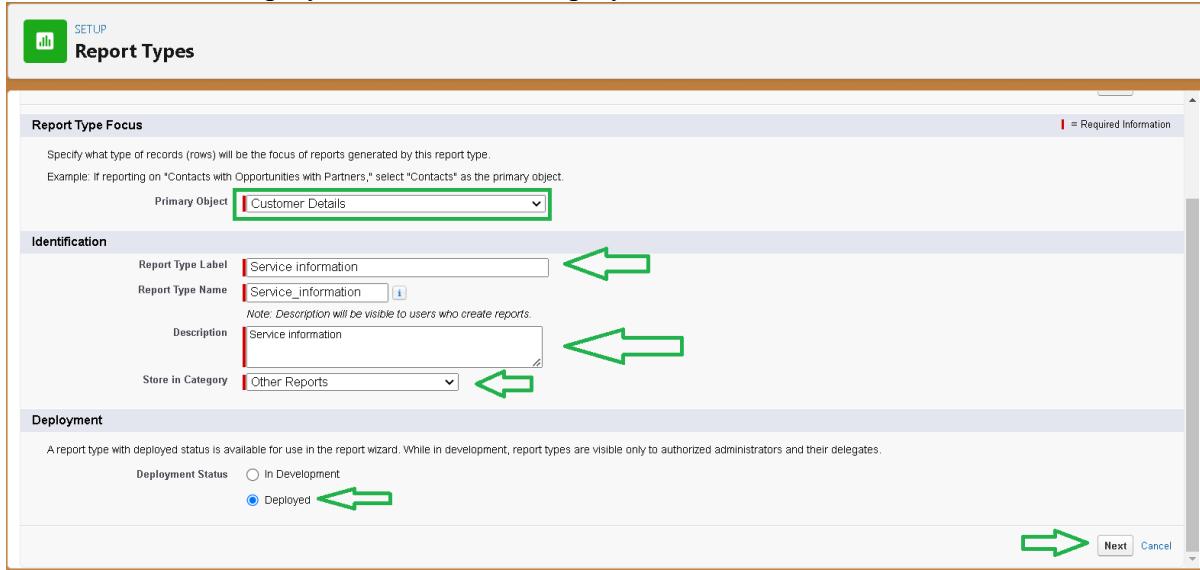
### 3.Create a report type

1. Go to setup >> type users in quick find box >> select Report Type >> click on Continue.
2. Click on new custom report type.

Action	Label	Description	Category	Deployed	Created By Alias	Created Date
Edit   Del	Bot Metrics Daily Summer '23	Einstein Bot metrics aggregated by day.	Other Reports	✓	autoproc	28/09/2023
Edit   Del	Bot Metrics Hourly Summer '23	Einstein Bot metrics aggregated by hour.	Other Reports	✓	autoproc	28/09/2023
Edit   Del	Screen Flows	Find out which flows get executed and how long users take to complete each flow screen.	Other Reports	✓	autoproc	24/09/2023
Edit   Del	Session Metrics Summer '23	Einstein Bot session metrics	Other Reports	✓	autoproc	28/09/2023

0. Select the Primary object as “Customer details” .
0. Give the Report type Label as “Service information ”
0. Report type Name is autopopulated.

0. Keep the Description as same.
0. Select Store in Category as “ other Reports ”
0. Select the deployment status as “ Deployed ”, click on Next.



**Report Type Focus**

Specify what type of records (rows) will be the focus of reports generated by this report type.  
Example: If reporting on "Contacts with Opportunities with Partners," select "Contacts" as the primary object.

**Identification**

Primary Object	Customer Details	
Report Type Label	Service information	
Report Type Name	Service_information	
Description	Service information	
Store in Category	Other Reports	

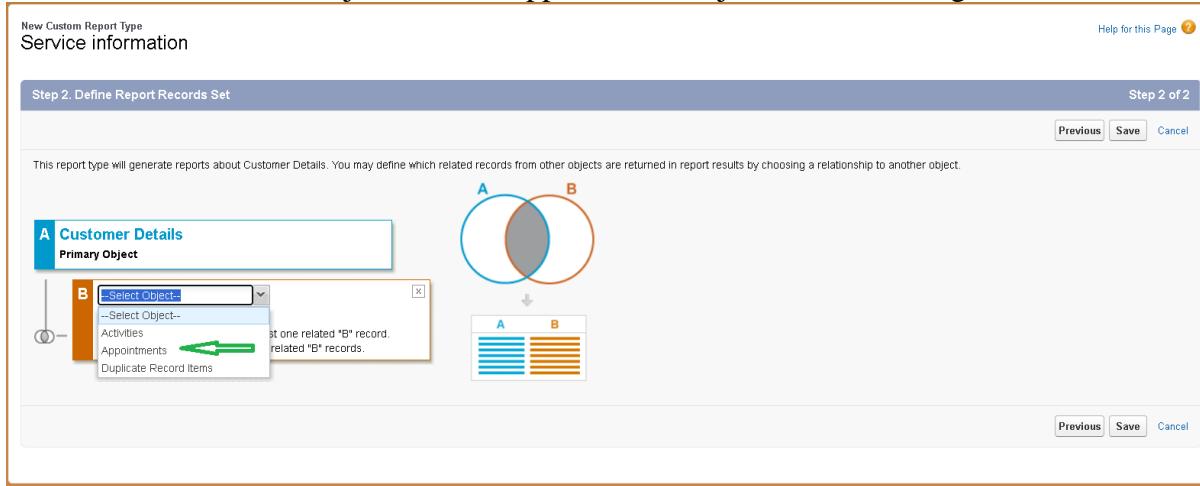
**Deployment**

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

Deployment Status	<input type="radio"/> In Development	
	<input checked="" type="radio"/> Deployed	

**Next** **Cancel**

0. now , Click on Related object box.
0. Click on Select Object, choose Appointment Object as shown in fig.



New Custom Report Type  
Service information

Help for this Page

Step 2 of 2

Previous Save Cancel

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

**A Customer Details**  
Primary Object

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

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

**A** **B**

Diagram: Two overlapping circles labeled A and B. The intersection area is shaded grey. An arrow points downwards from the intersection area to a grid below. The grid has two columns, each with four horizontal bars. The first column is blue and labeled 'A', the second is orange and labeled 'B'.

Previous Save Cancel

## Step 2. Define Report Records Set

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

**A Customer Details**  
 Primary Object

**B Appointments**

**A to B Relationship:**

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

(Click to relate another object)


0. Again Click to relate another object.
0. And select the related object as “ service records”.
0. Repeat the process and select the related object as “ Billing details and feedback”.
0. And click on save.

**A Customer Details**  
 Primary Object

**B Appointments**

**A to B Relationship:**

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

(Click to relate another object)

**C Service records**

**B to C Relationship:**

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

(Click to relate another object)

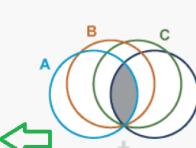
**D Billing details and feedback**

**C to D Relationship:**

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

(Click to relate another object)

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


Previous Save Cancel

## 4.Create report

Note : Before creating report, create latest “10” records in every object.  
 Try to fill every field in each record for better experience.

1. Go to the app >> click on the reports tab
  2. Click New Report.



The screenshot shows the Microsoft Dynamics 365 Employee Management application. The top navigation bar includes links for Home, Employees, Assets, Asset Services, Projects, Project Tasks, Reports (which is highlighted with a red box), and Dashboards. Below the navigation is a search bar and a ribbon of icons. The main content area is titled 'Reports' and shows a 'Recent' section with two items: 'Employee's working on projects report' and 'Assets assigned to Employees'. A red box highlights the 'New Report' button in the top right corner of the report list. On the left, there are sections for 'RECENT' (Recent, Created by Me, Private Reports, Public Reports, All Reports) and 'FOLDERS'.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Employee's working on projects report		Private Reports	Employee Project	5/6/2023, 9:33 am	
Created by Me	Assets assigned to Employees		Private Reports	Employee Project	5/6/2023, 9:36 am	

0. Select the Category as other reports, search for Service Information, select that report, click on it. And click on start report.

Create Report

Category	Report Type Name	Category
Customer Support Reports	Service records	Standard
Leads	Service records with Appointment	Standard
Campaigns	Service records History	Standard
Activities	Billing details and feedback with Service records	Standard
Contracts and Orders	Service information	Custom
Price Books, Products and Assets		
Administrative Reports		
File and Content Reports		
Individuals		
<b>Other Reports</b>		
Hidden Report Types		

Details

**Service information**  
Custom Report Type

**Start Report**

**Fields (49)**

**Description**  
Service information

**Created By You**  
No Reports Yet

**Created By Others**  
No Reports Yet

0. Their outline pane is opened already, select the fields that mentioned below in column section.
    - . Customer name
    - a. Appointment Date
    - b. Service Status
    - c. Payment paid
  0. Remove the unnecessary fields.
  0. Select the fields that mentioned below in GROUP ROWS section.
    - . Rating for Service
  0. Select the fields that mentioned below in GROUP ROWS section.
    - . Payment Status
  0. Click on Add Chart , Select the Line Chart.
  
  0. Click on save, Give the report Name : New Service information Report
  0. Report unique Name is auto populated.
  0. Select the folder the created and Click on save.

REPORT ▾

New Service information Report ▾ Service information

Fields > Outline ▾ Filters 2

Rating for service ▾ Payment Status → Completed Total

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

Update Preview Automatically

Rating for service

Sum of Payment Paid

Customer Name Appointment Date Service Status Payment Paid

Customer Name	Appointment Date	Service Status	Payment Paid
1 meghana	11/10/2023	Completed	₹8,000
2 rushi	08/09/2023	Completed	₹3,000
3 shivam	12/10/2023	Completed	₹2,000
4 shivam	12/10/2023	Completed	₹2,000
5 rushi	08/09/2023	Completed	₹3,000

Row Counts  Detail Rows  Grand Total  Stacked Summaries

Conditional Formatting

Save Report

\*Report Name

Report Unique Name i

Report Description

Folder

Select Folder

Cancel Save

## Step 28 : Dashboards

### 1.Create a 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

- Follow the same steps, from milestone 15, and activity 2, and provide the sharing settings for the folder that just created.

## 2.Creation Dashboard

- Go to the app >> click on the Dashboards tabs.
- Give a Name and select the folder that created, and click on create.

New Dashboard

\* Name  
Customer review

Description

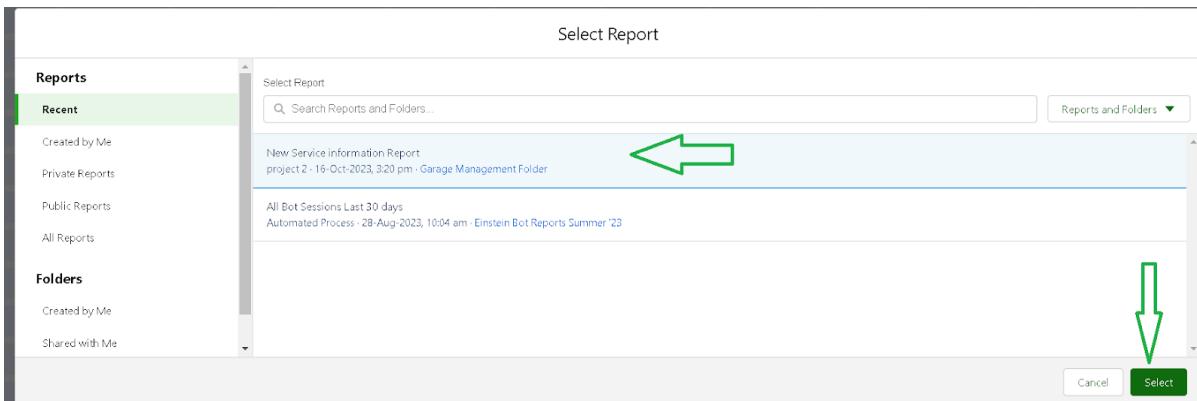
Folder  
Service Rating

- Select add component.

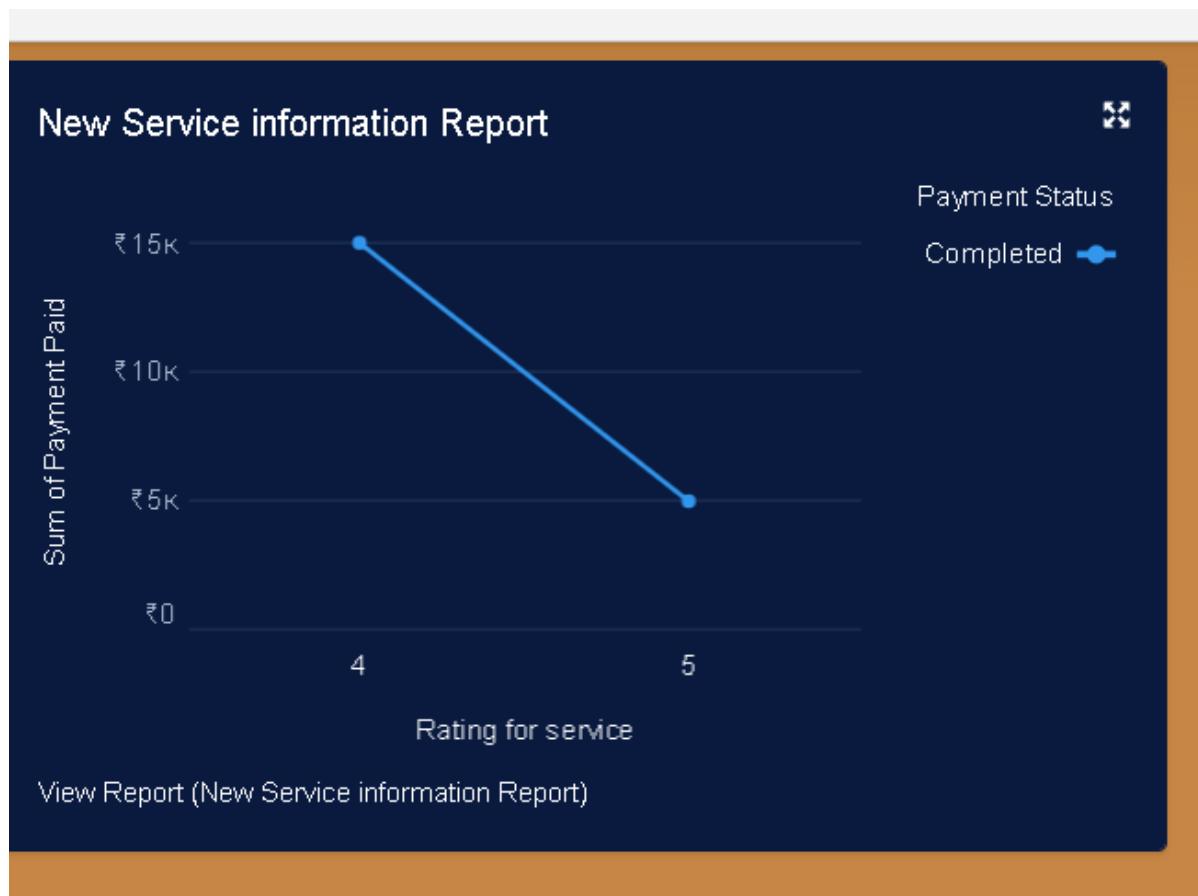
Employee Manage... Home Employees Assets Asset Services Projects ProjectTasks Reports Dashboards

Dashboard 1

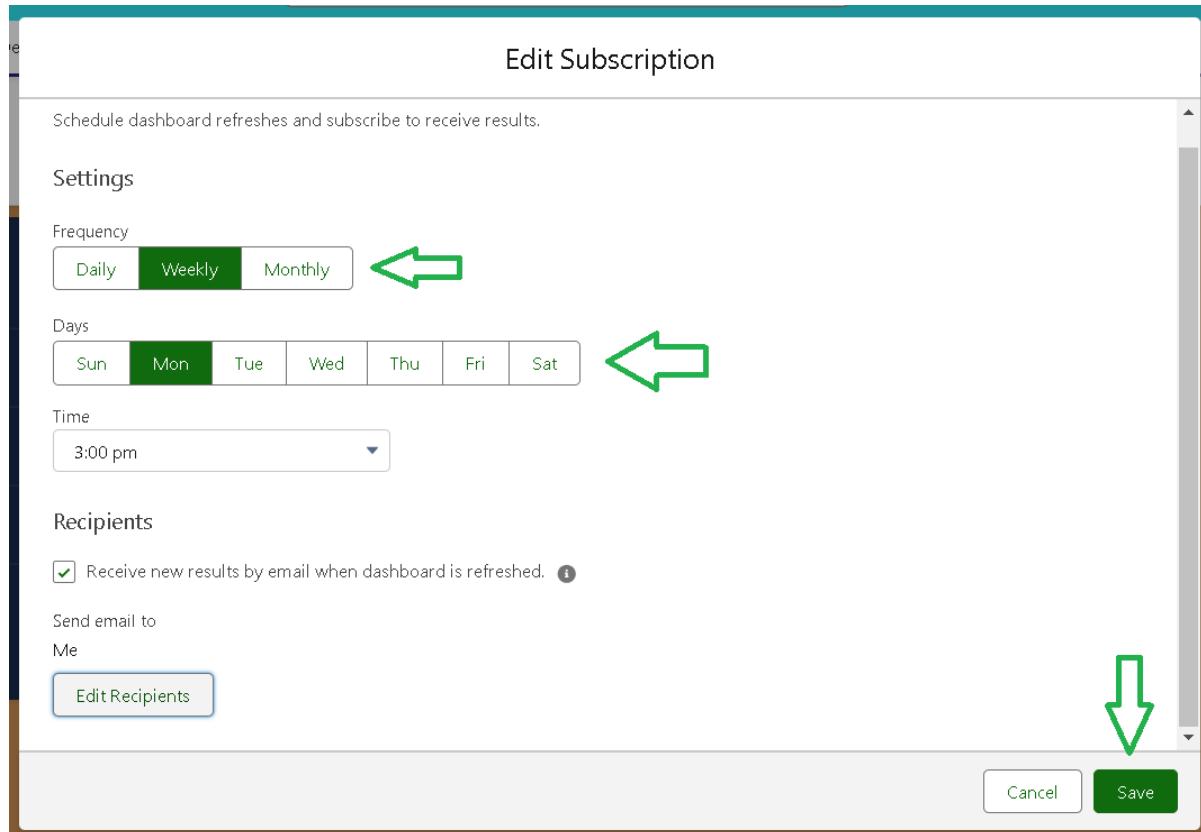
- Select a Report and click on select.



0. Select the Line Chart. Change the theme.
0. Click Add then click on Save and then click on Done.
0. Preview is shown below.



0. After that Click on Subscribe on top right.
0. Set the Frequency as “ weekly ”.
0. Set a day as monday.
0. And Click on save.



## 4. Conclusion

In conclusion, the Garage Management Project implemented in Salesforce offers a comprehensive solution to streamline and enhance the efficiency of garage operations. By leveraging Salesforce's robust platform, the project integrates key business processes such as inventory management, customer service, scheduling, and billing into a unified system. The project has improved data accuracy, real-time reporting, and overall customer satisfaction by providing seamless access to critical information. Furthermore, the automation of routine tasks has reduced manual errors and improved operational efficiency.

With Salesforce's customization capabilities, the system can adapt to the evolving needs of the business, ensuring long-term scalability and growth. The ability to track sales, monitor service requests, and manage customer interactions in a centralized CRM system has significantly boosted the sales team's productivity and customer relationship management.

Overall, the implementation of Salesforce for garage management has proven to be a valuable tool, optimizing operations, enhancing customer engagement, and driving business growth, while setting a strong foundation for future technological advancements in the industry.