PROJECT TITLE:

Garage Management System

College Name:

Sri Vasavi College Self Finance Wing, Erode

College Code:

bru17

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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

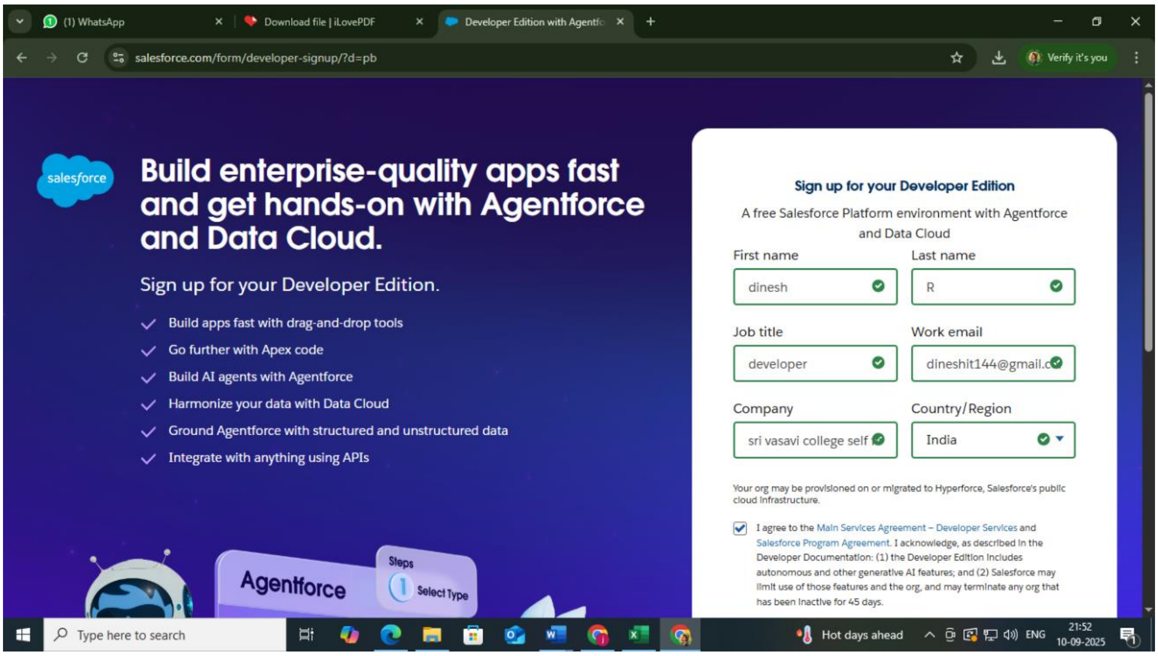
2. Objectives

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

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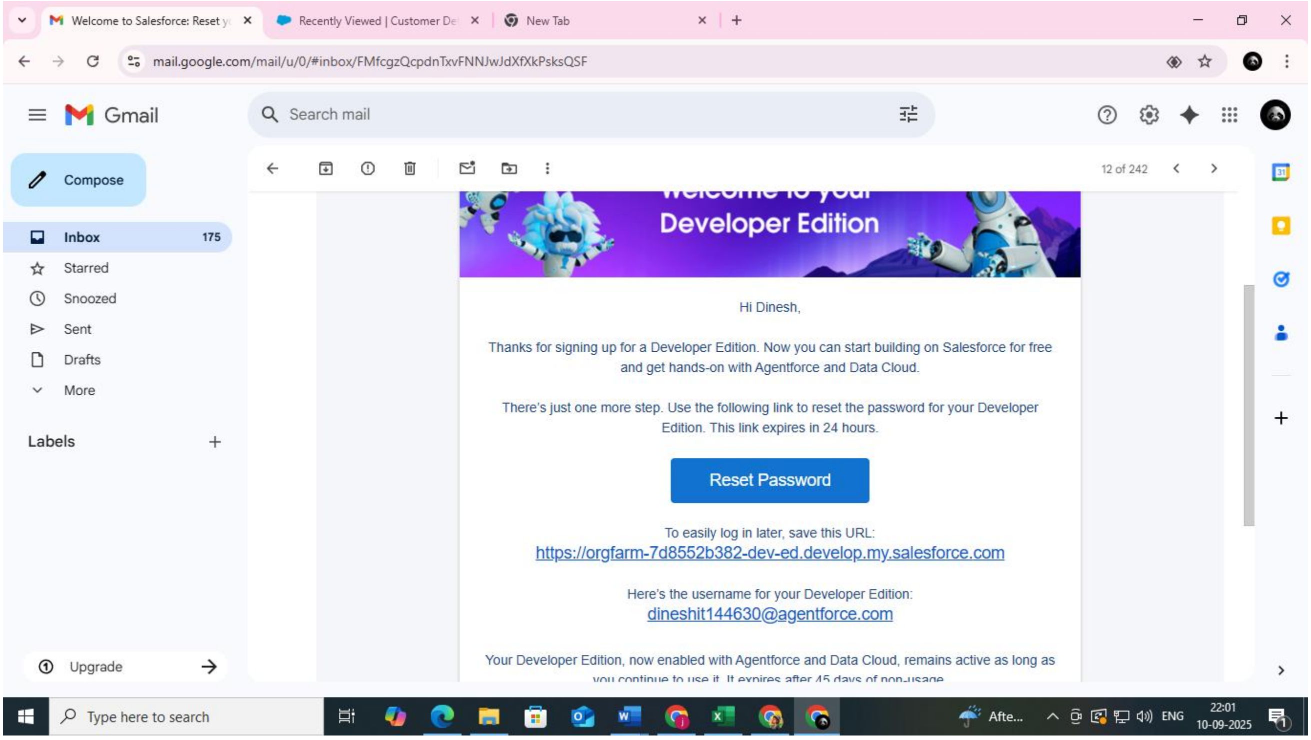
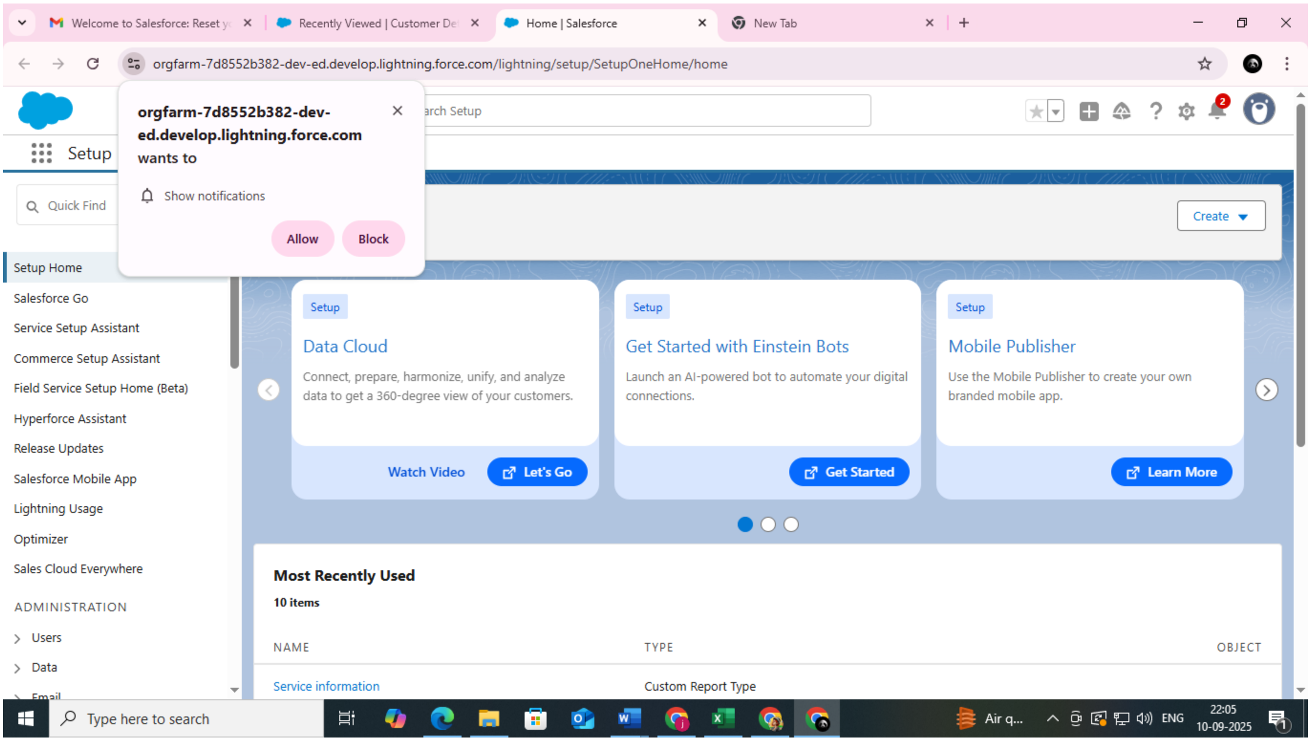
4. Account Activation

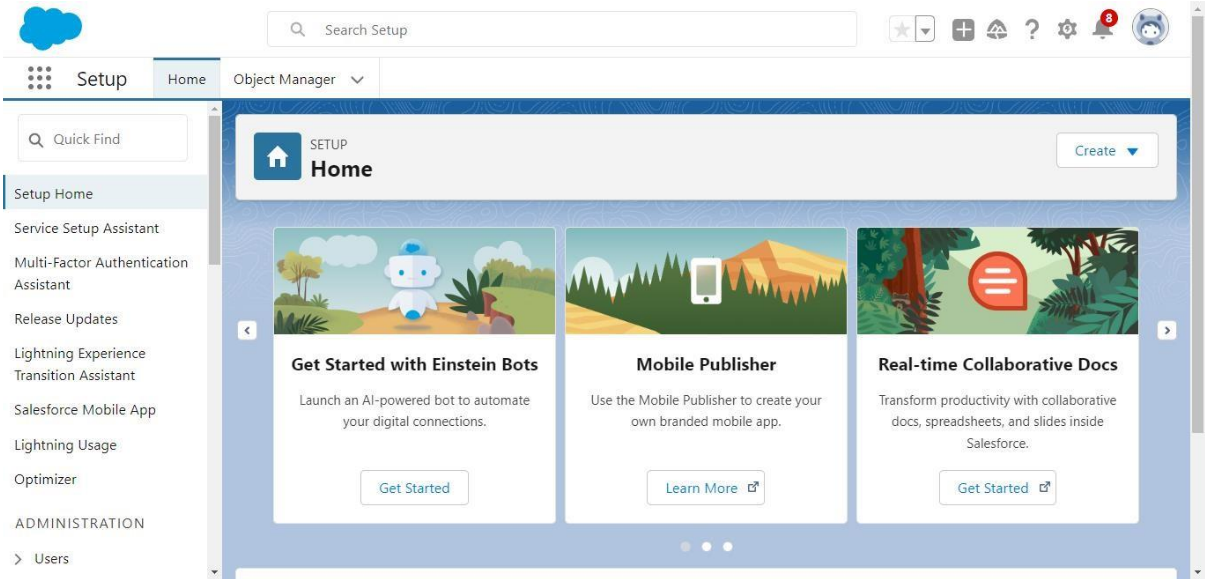
1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



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

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

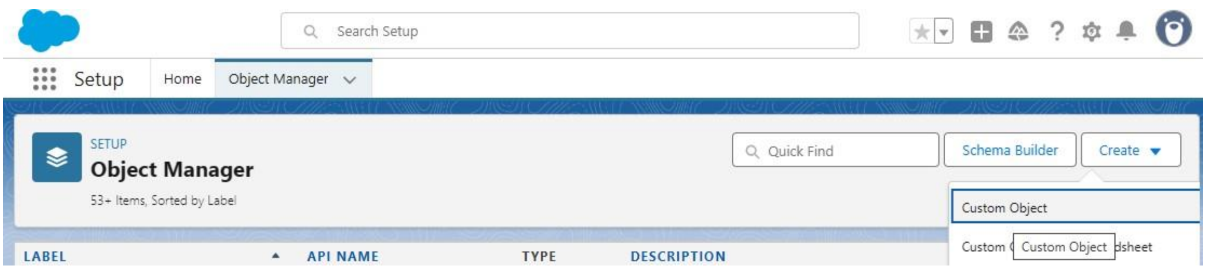


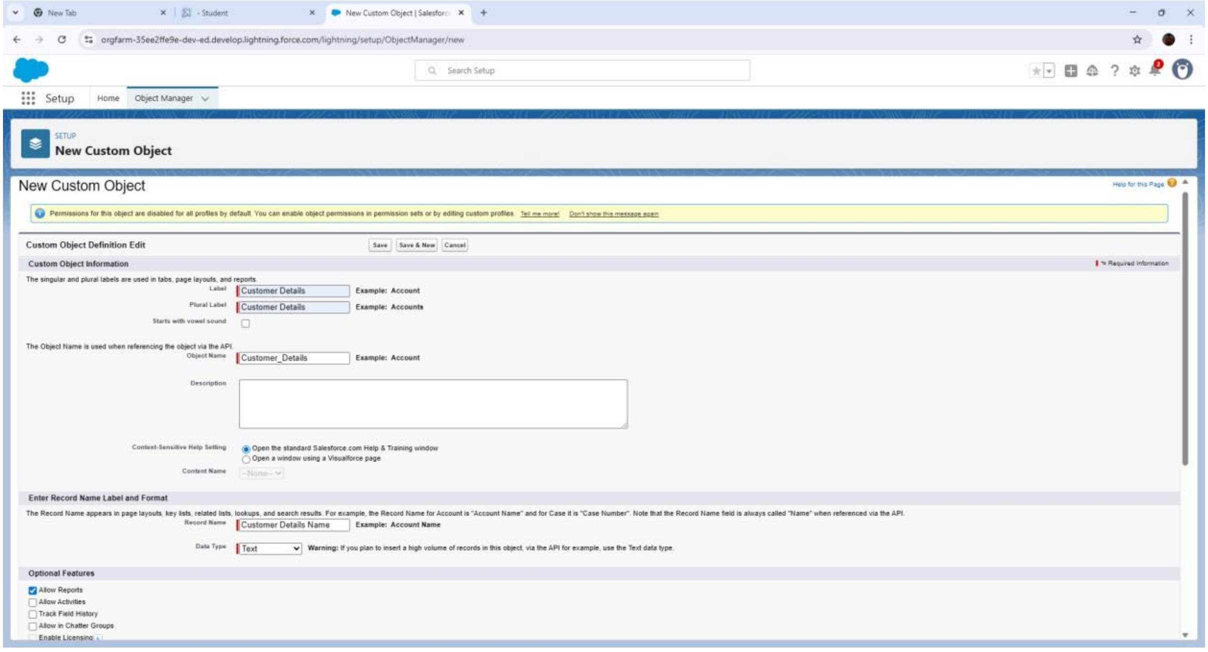


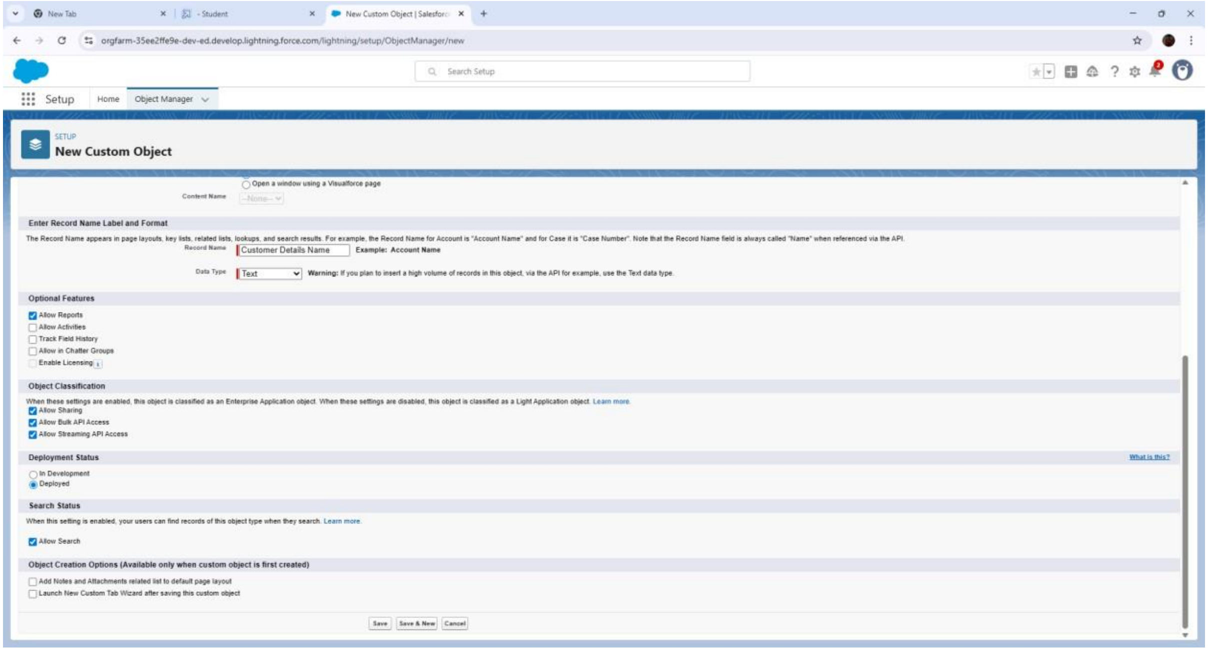
5. Created Customer Details Object

To create an object:

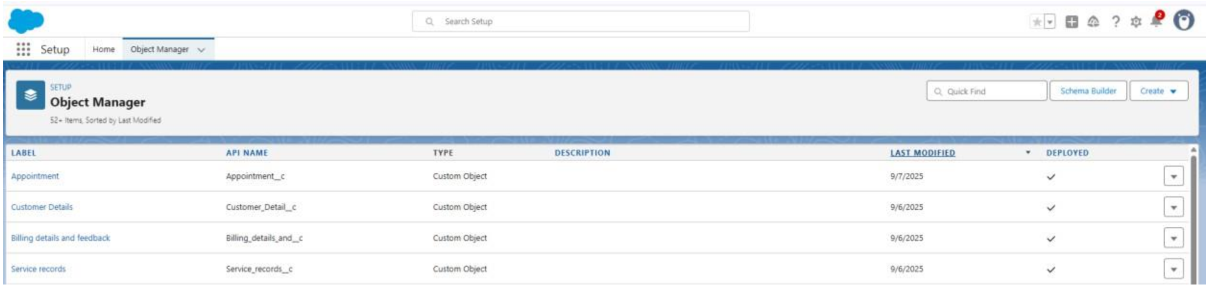
1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
2. Enter the label name >> Customer Details
3. Plural label name >> Customer Details
4. Enter Record Name Label and Format
5. Record Name >> Customer Name
6. Data Type >> Text
7. Click on Allow reports and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







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



6. Created a Custom Tab

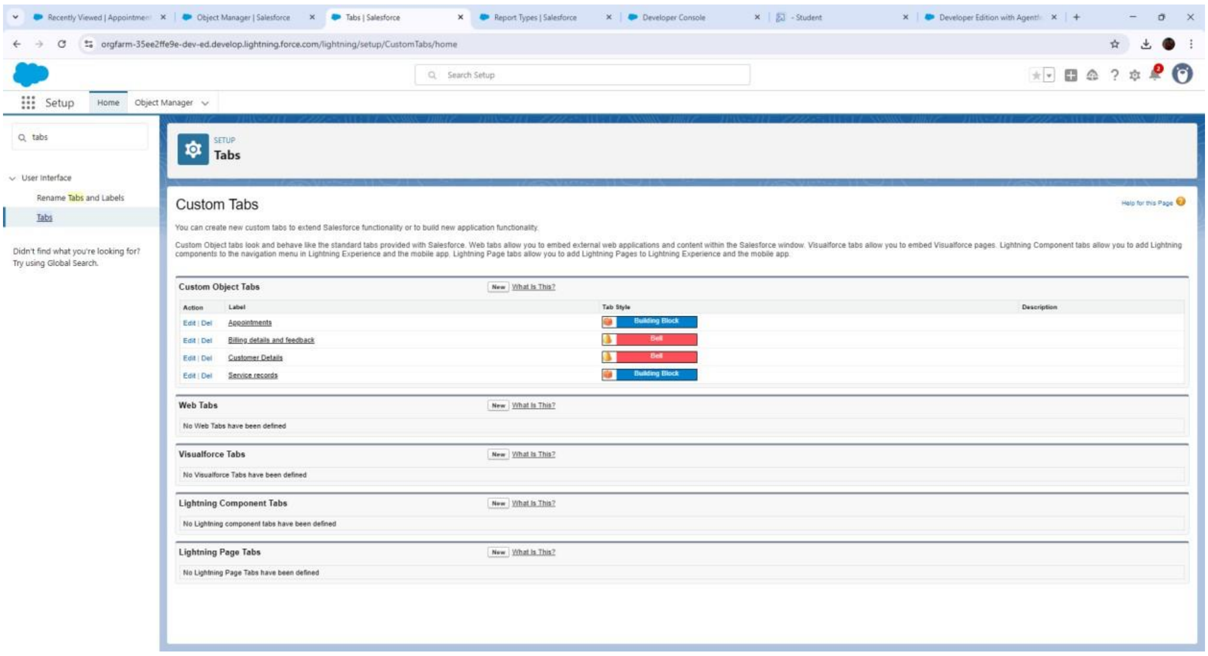
To create a Tab:(Customer Details)

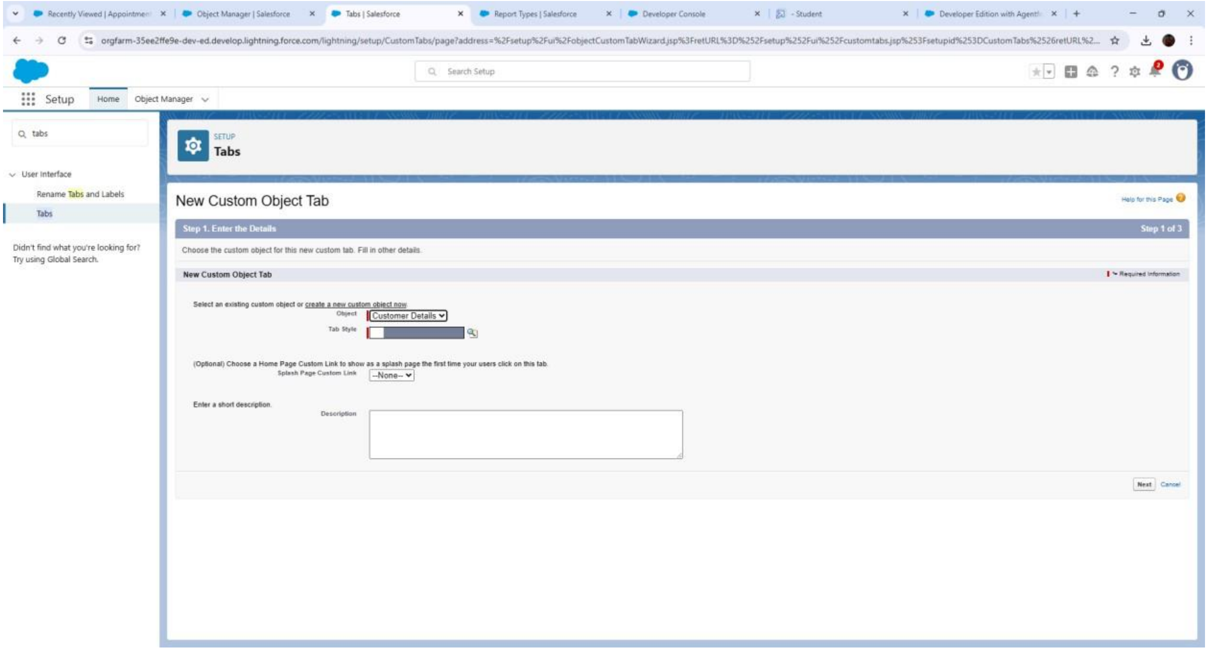
1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)

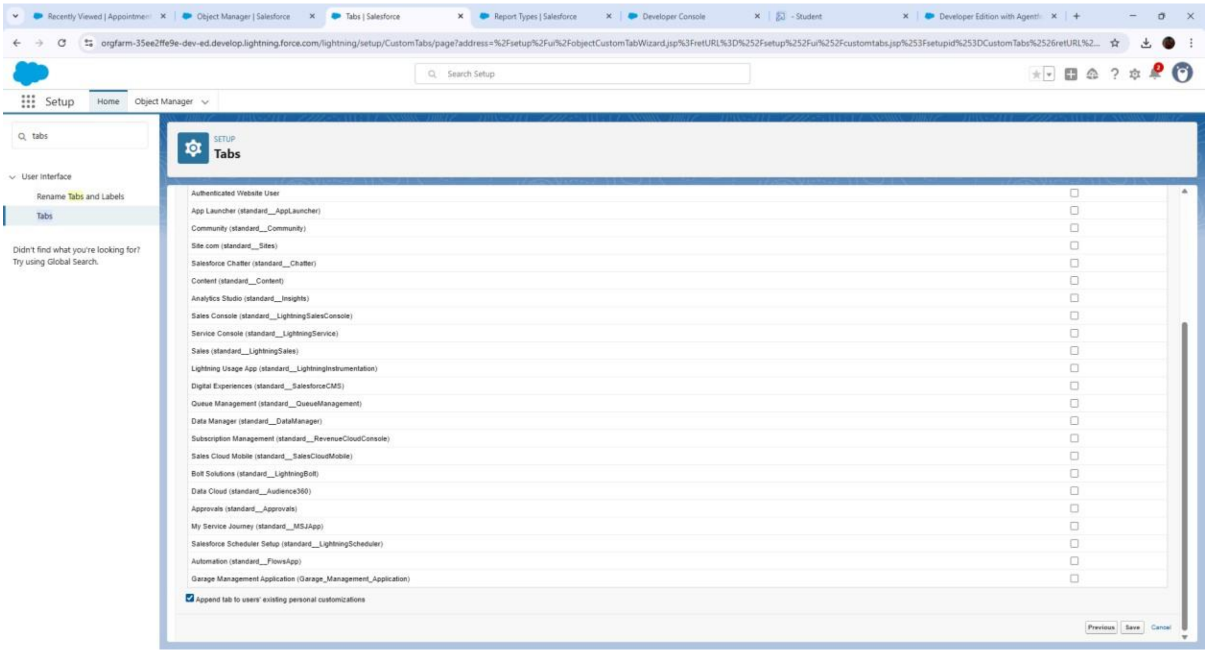
2. Select Object(Customer Details) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .

3. Make sure that the Append tab to users' existing personal customizations is checked.

4. Click save.




Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
SETUP
Tabs
New Custom Object Tab
Help for this Page
Step 1. Enter the Details
Step 1 of 3
Choose the custom object for this new custom tab. Fill in other details.
New Custom Object Tab
= Required Information
Select an existing custom object or create a new custom object now.
Object
Customer Details
Tab Style
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link
--None--
Enter a short description.
Description
Next
Cancel


Setup
Home
Object Manager
tabs
User Interface
Rename Tabs and Labels
Tabs
Didn't find what you're looking for?
Try using Global Search.
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__Audience360)
Approvals (standard__Approvals)
My Service Journey (standard__MSJApp)
Salesforce Scheduler Setup (standard__LightningScheduler)
Automation (standard__FlowsApp)
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

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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.

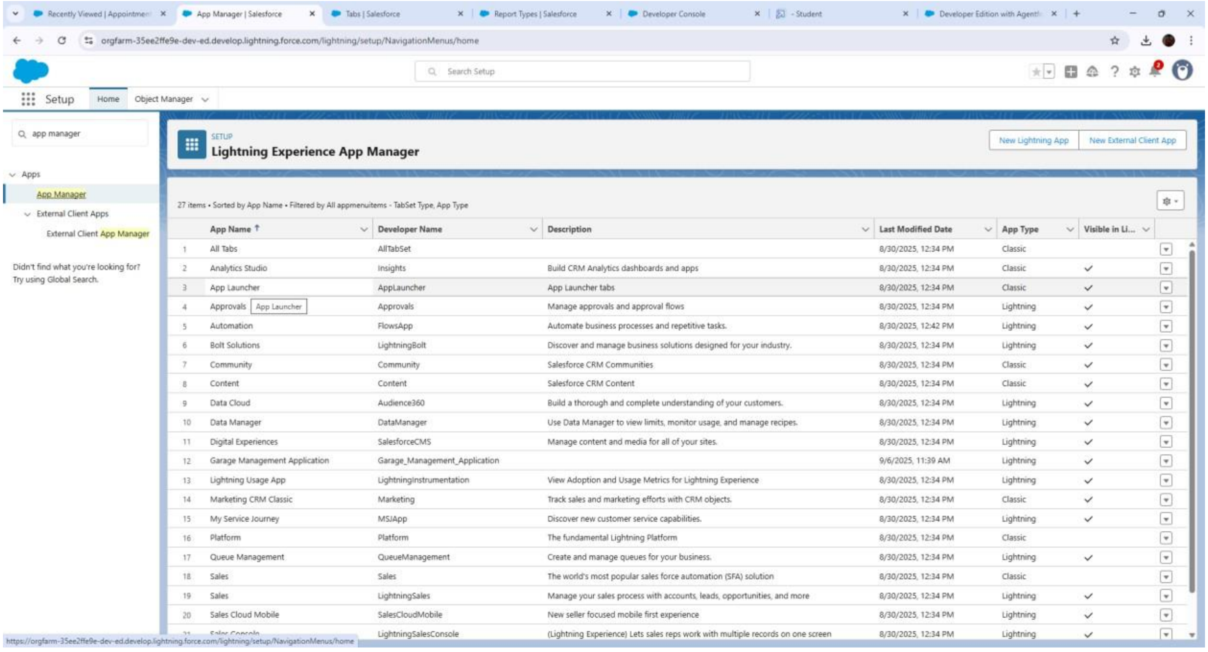
2. Fill the app name in app details as Garage Management Application >> Next >> (App option page) keep it as default >> Next >> (Utility Items) keep it as default >> Next.

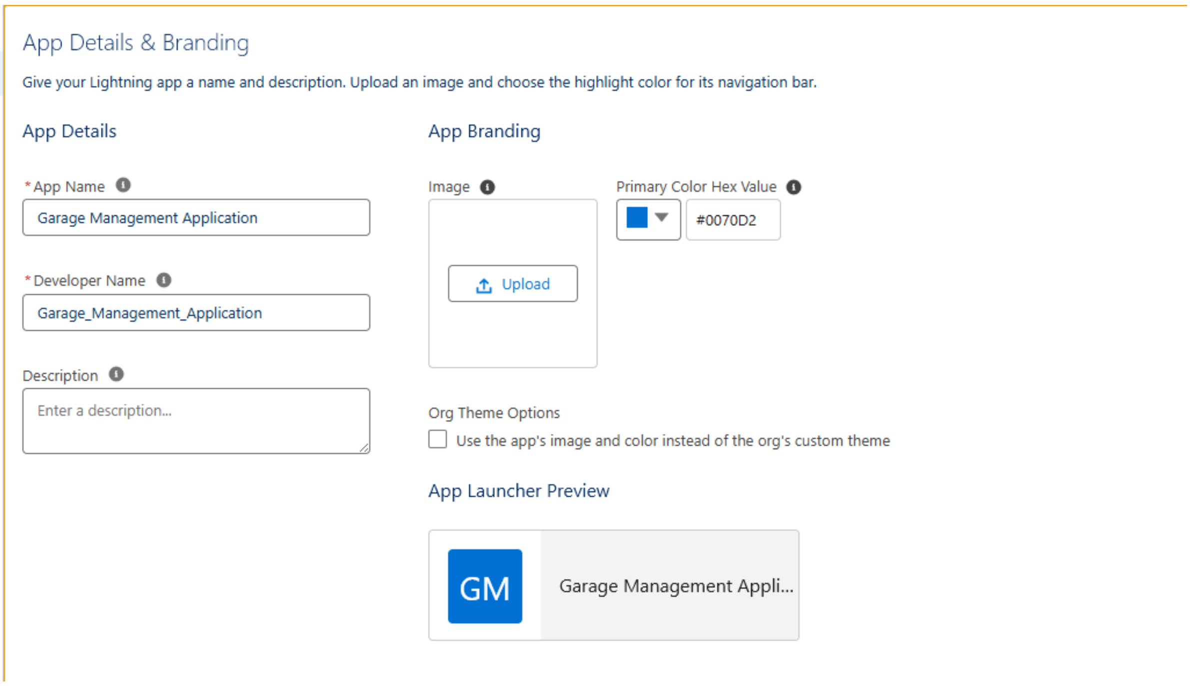
3. To Add Navigation Items:

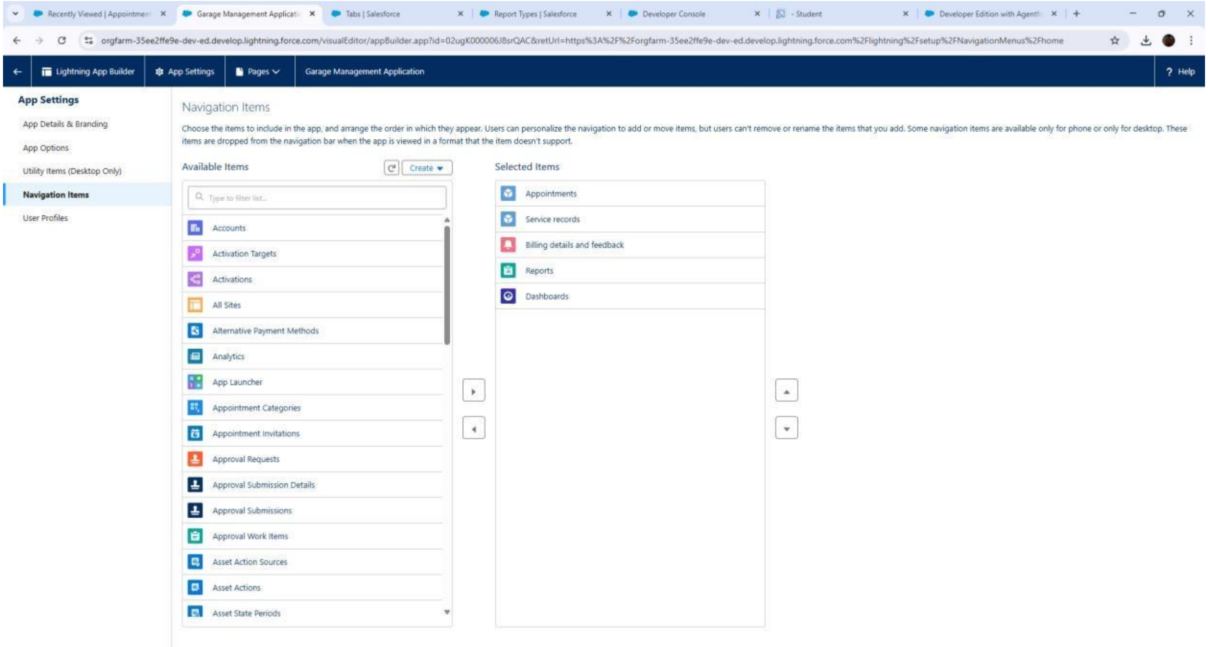
4. Select the items (Customer Details,Appointments, Service records, Billing details and feedback, Reports and Dashboards) from the search bar and move it using the arrow button >> Next.

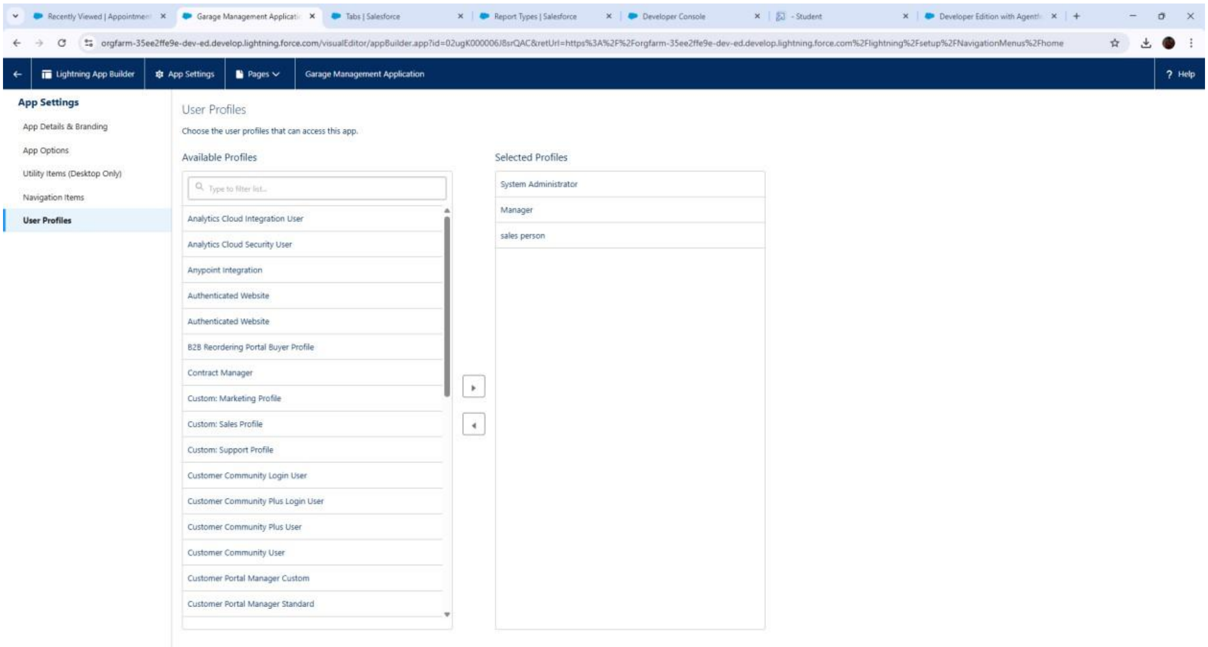
5. To Add User Profiles:

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


Setup
Home
Object Manager
Search Setup
app manager
Apps
App Manager
External Client Apps
External Client App Manager
Didn't find what you're looking for? Try using Global Search.
SETUP
Lightning Experience App Manager
New Lightning App
New External Client App
27 items • Sorted by App Name • Filtered by All appmenuitems - TabSet Type, App Type
App Name | Developer Name | Description | Last Modified Date | App Type | Visible in Li...
1 All Tabs | AllTabSet | | 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 | Approvals | Manage approvals and approval flows | 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 | | 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 | MSJApp | 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
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 Branding
* App Name
Garage Management Application
* Developer Name
Garage_Management_Application
Description
Enter a description...
Image
Upload
Primary Color Hex Value
#0070D2
Org Theme Options
Use the app's image and color instead of the org's custom theme
App Launcher Preview
GM
Garage Management Appli...





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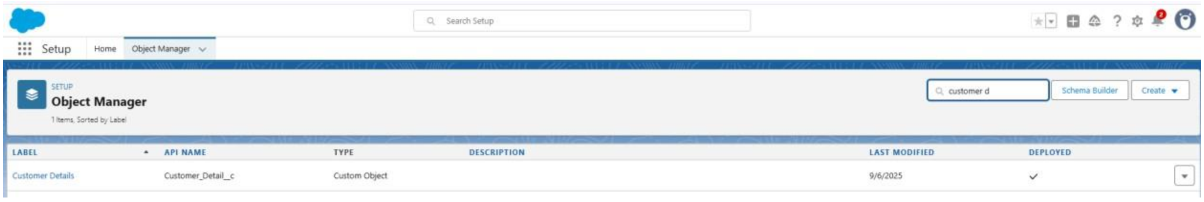
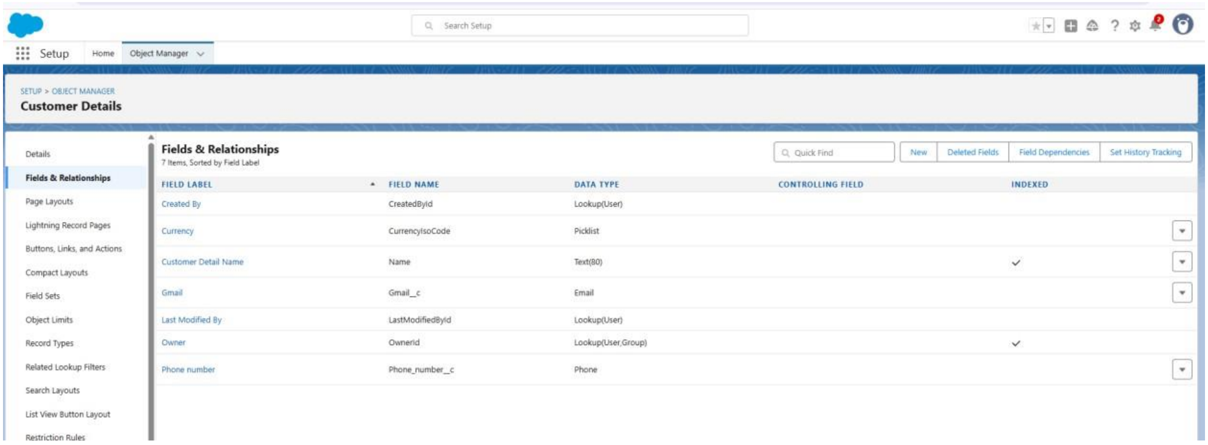
8. Created a fields for the Customer Details object

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.



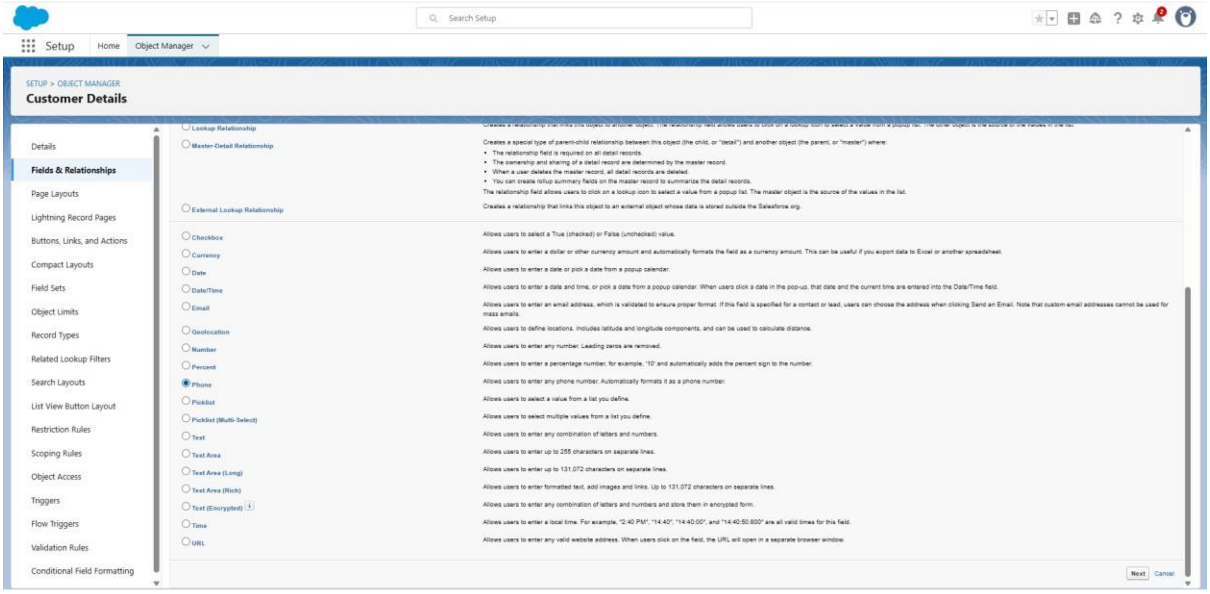
2. Now click on “Fields & Relationships” >> New

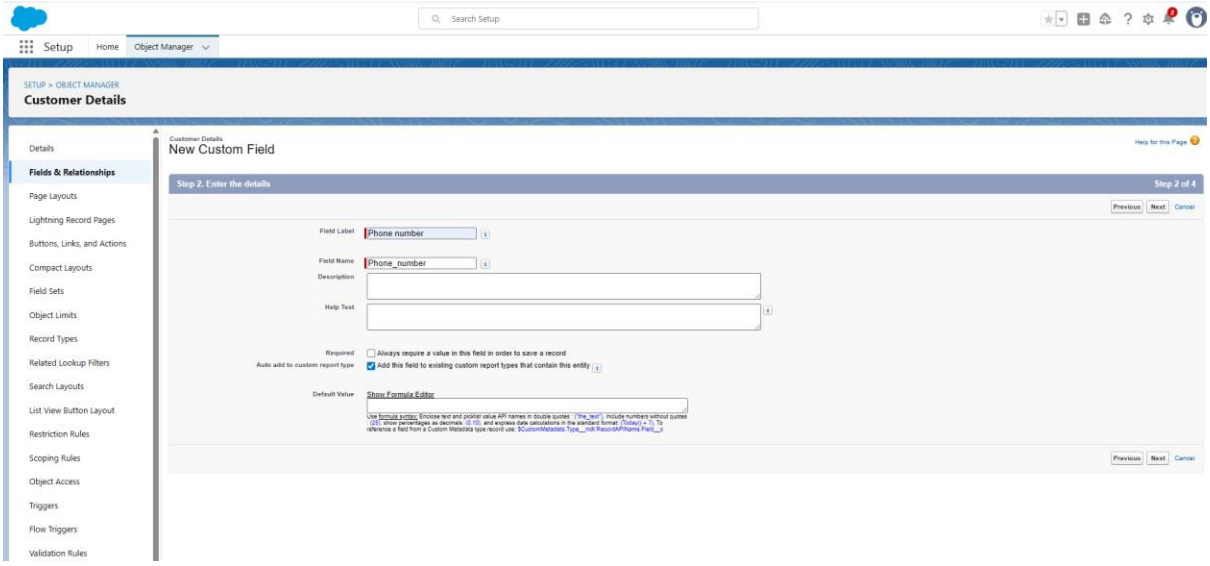


3. Select Data Type as a “Phone”
4. Click on next.

5. Fill the Above as following:

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





Note: Follow the above steps for the remaining field for the 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
	Other fields as required	*Various Types*	Follow same steps for creating additional fields
Appointment	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
	Vehicle Number Plate	Text (Length: 10)	Required & Unique
	Customer (Lookup)	Lookup (Customer Details)	Links Appointment to Customer Details
Service Records	Quality Check Status	Checkbox	Default Value: Unchecked
	Service Status	Picklist	Values: Started, Completed
	Appointment (Lookup)	Lookup (Appointment)	Required Field with Filter: *Appointment Date* < *Created Date*
	Service Date	Formula (Return Type: Date)	Formula: CreatedDate
Billing Details & Feedback	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

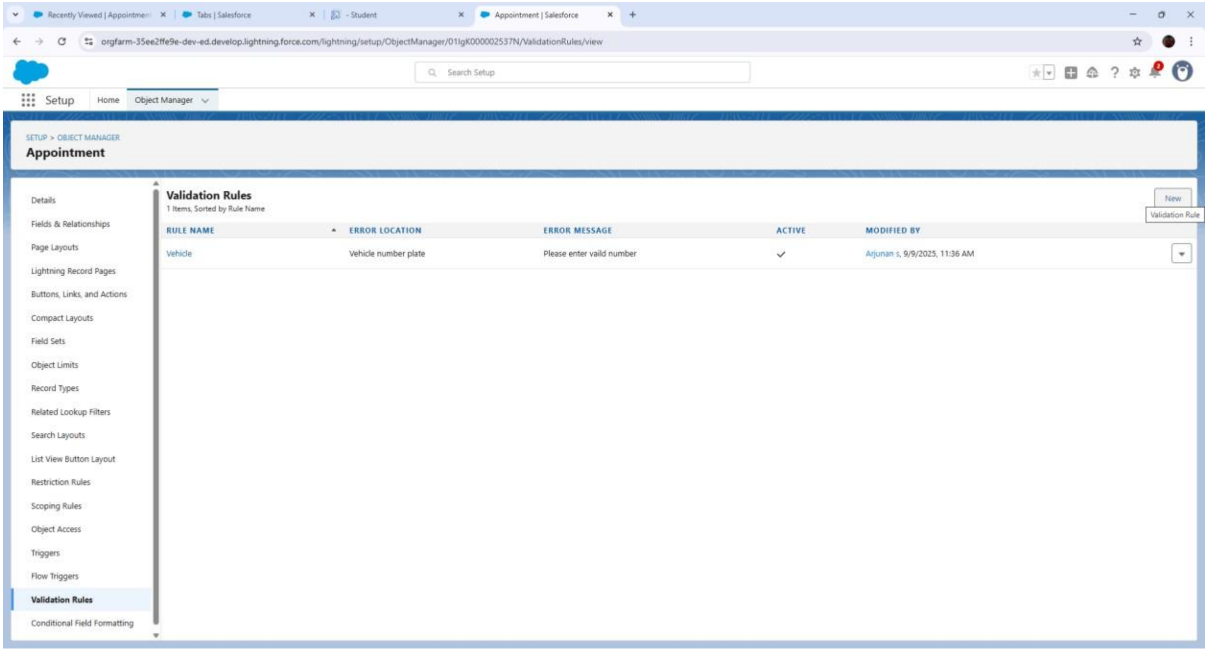
1. Go to the setup page >> click on object manager >> From drop down click edit for Appointment object.
2. Click on the validation rule >> click New.

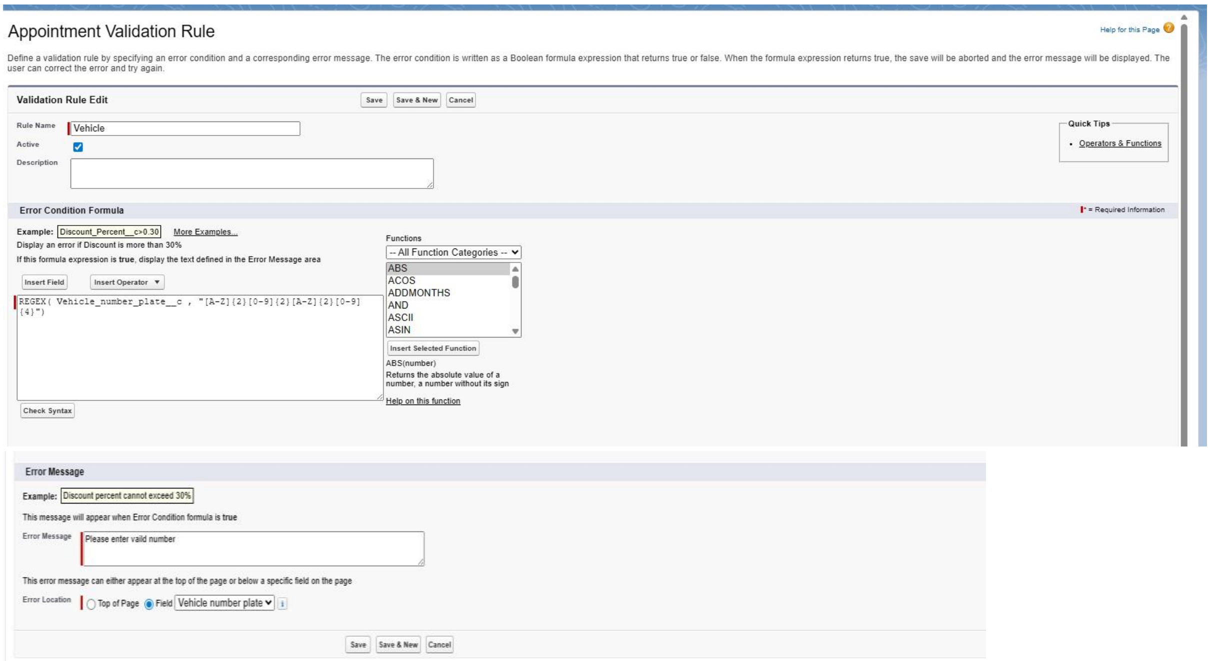
3. Enter the Rule name as " Vehicle ".

4. Insert the Error Condition Formula as : -

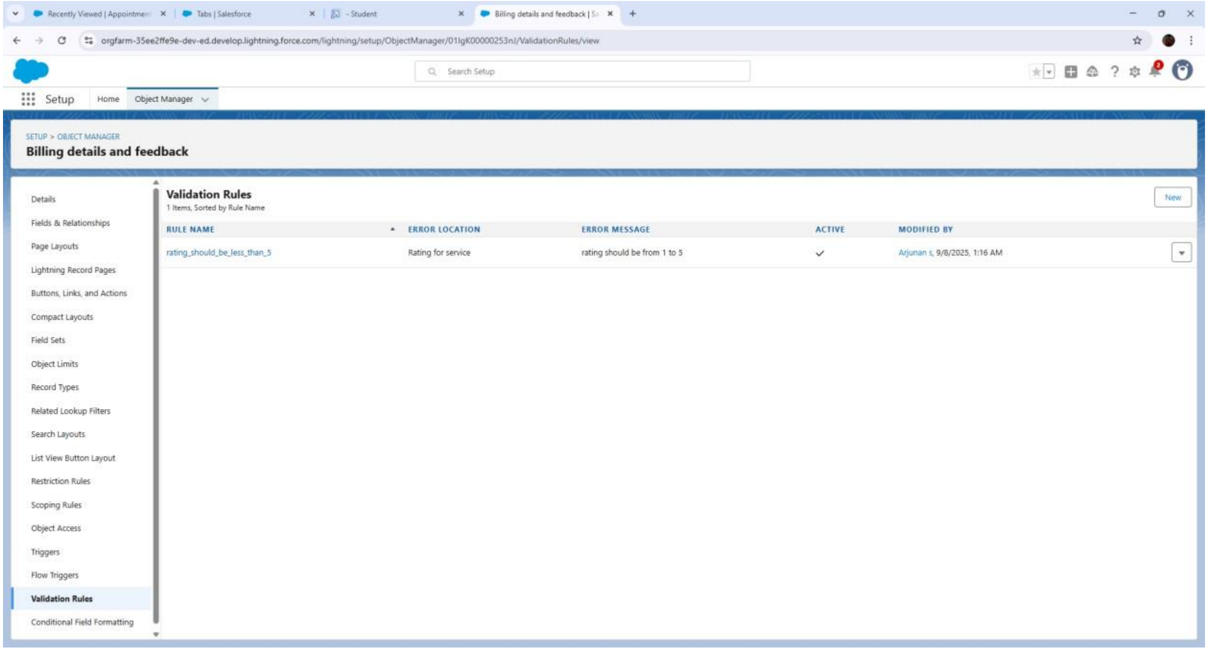
NOT(REGEX(Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))

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





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

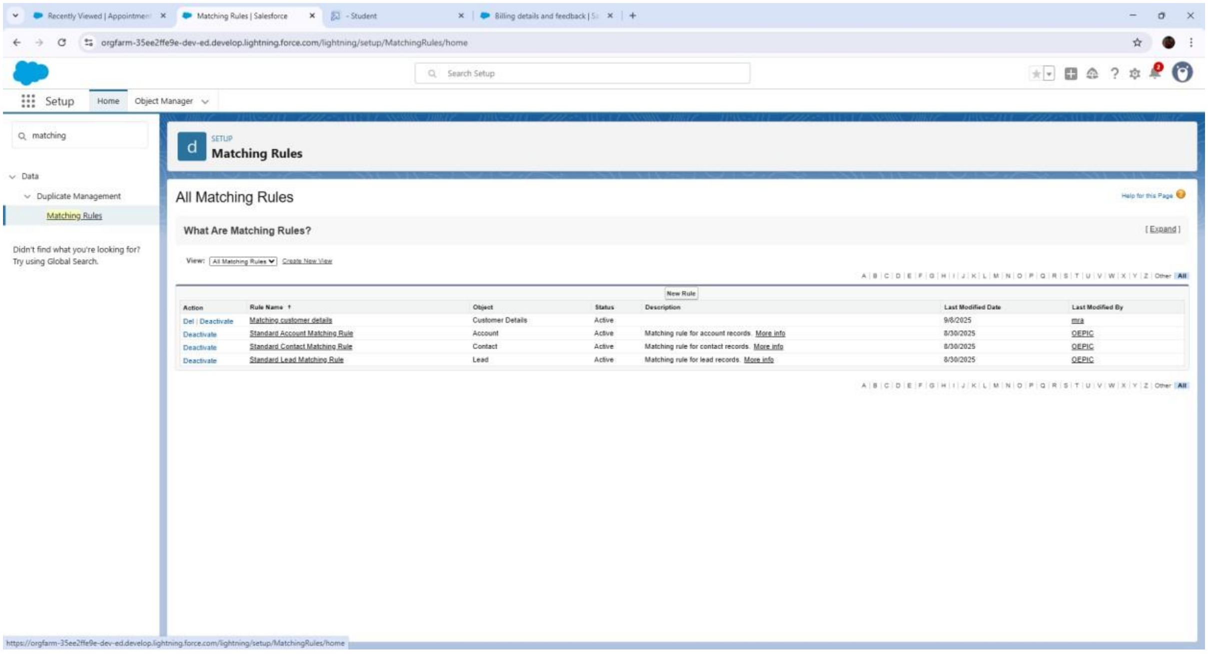


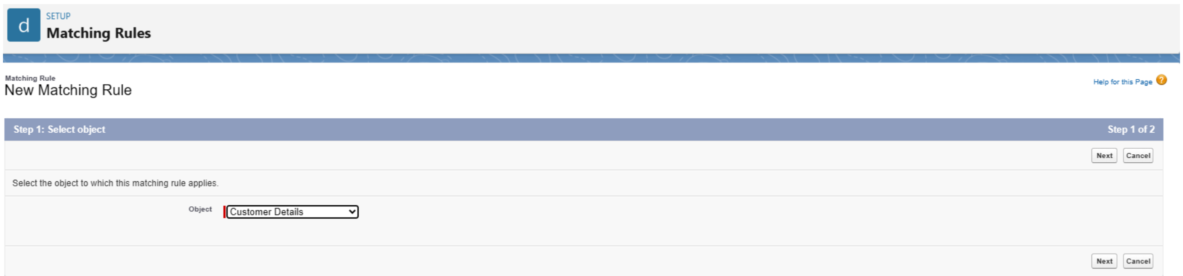
10.1 created a matching rule to an Customer details Object

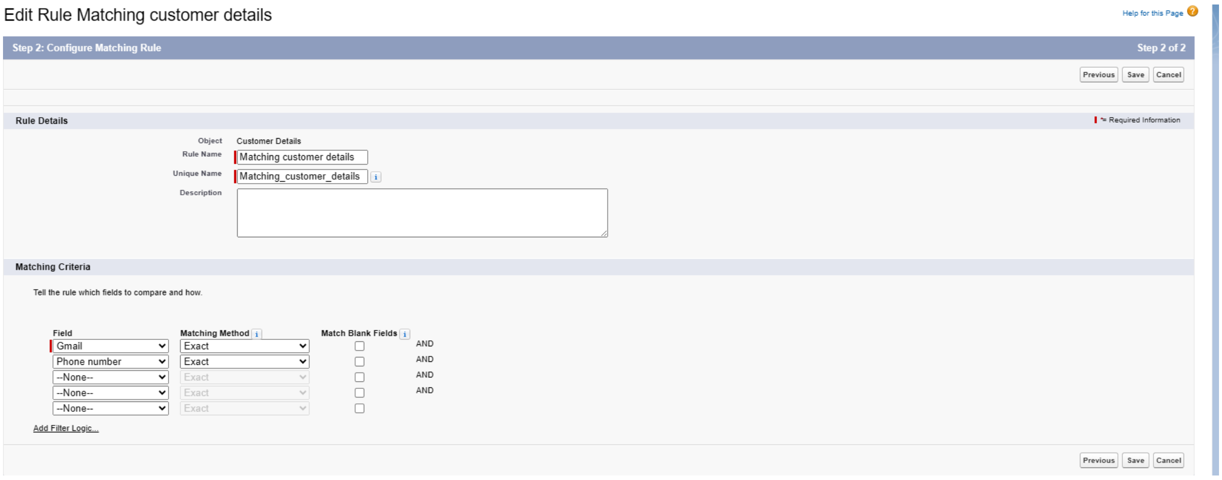
1. Go to quick find box in setup and search for matching Rule.
2. Click on matching rule >> click on New Rule.

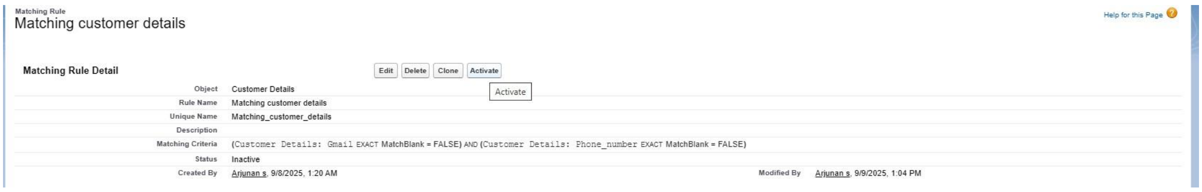
3. Select the object as Customer details and click Next.

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.



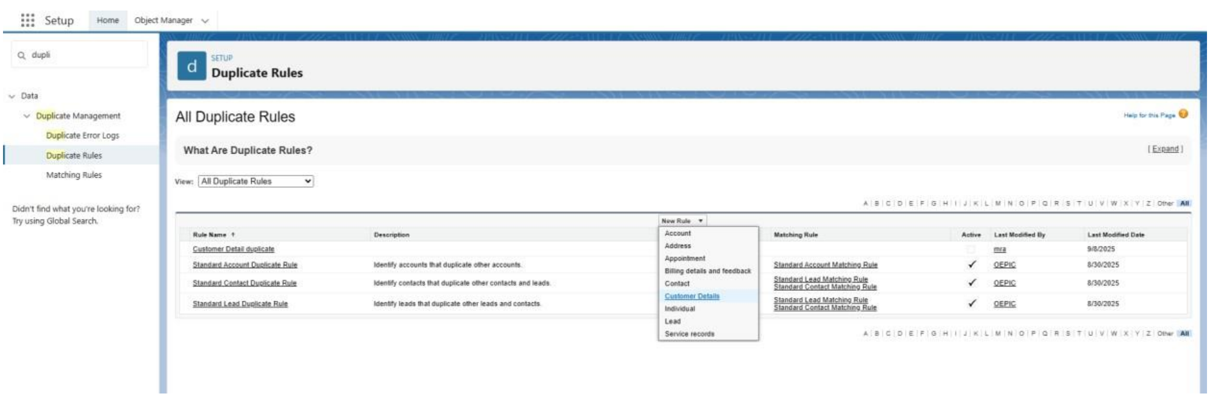


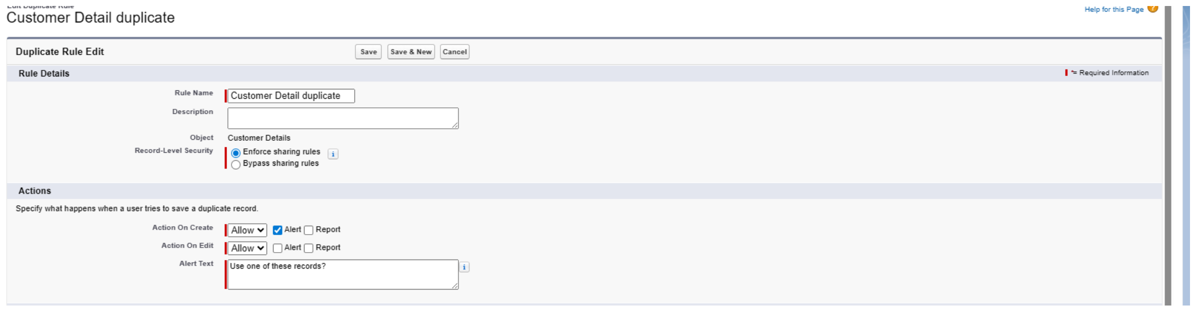


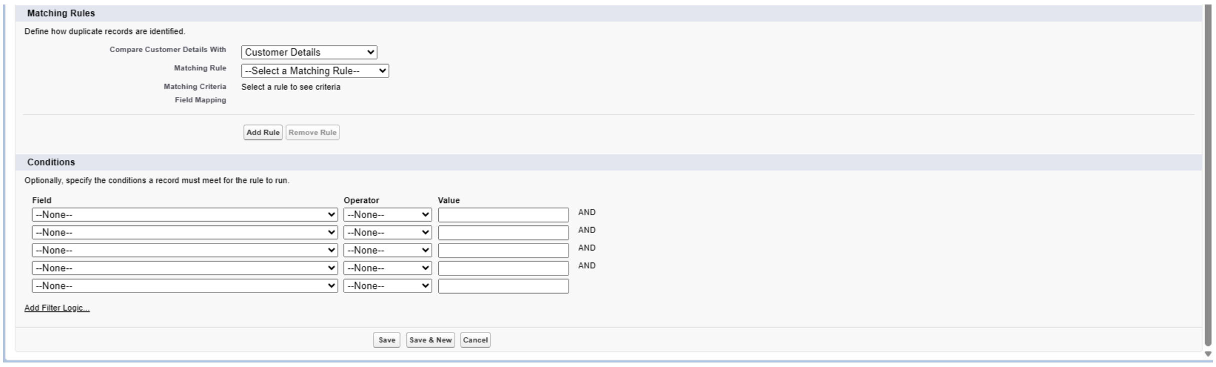


10.2 Created a Duplicate rule to an Customer details Object

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.

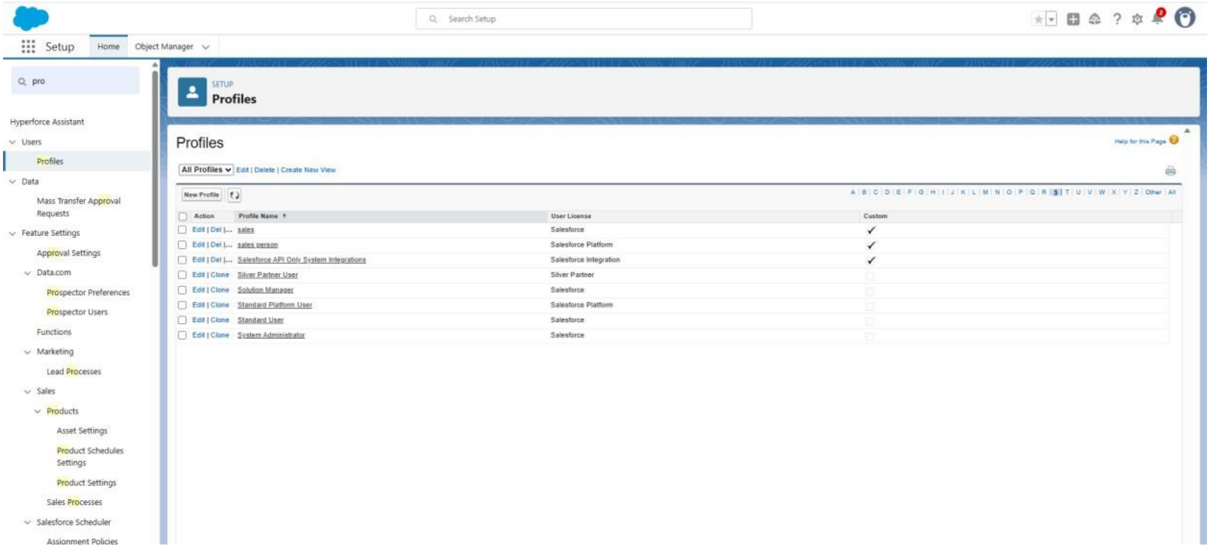




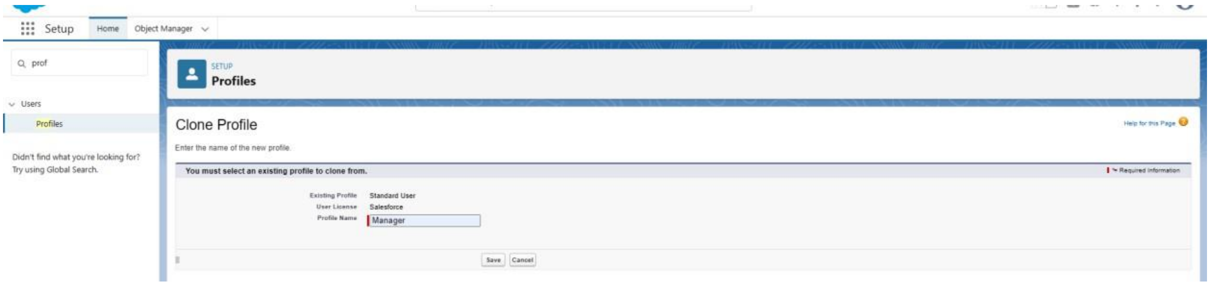


11. Created a new profile:

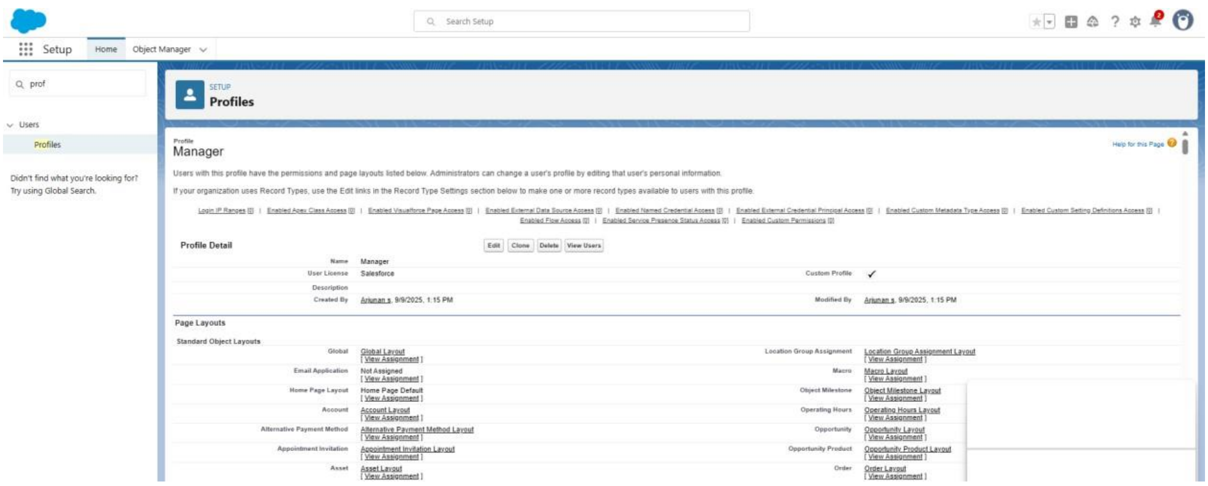
1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (Manager) >> Save.
2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the Garage management.
4. Scroll down to Custom 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.



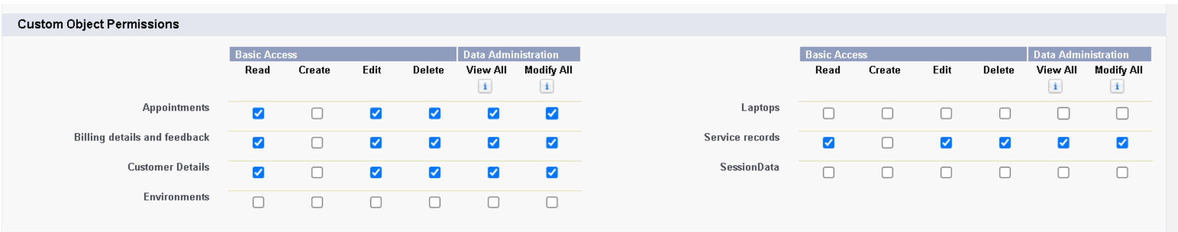
Setup
Home
Object Manager
Search Setup
SETUP
Profiles
Profiles
All Profiles
Edit | Delete | Create New View
New Profile
Action
Profile Name
User License
Custom
sales
Salesforce
sales person
Salesforce Platform
Salesforce API Only System Integrations
Salesforce Integration
Silver Partner User
Silver Partner
Solution Manager
Salesforce
Standard Platform User
Salesforce Platform
Standard User
Salesforce
System Administrator
Salesforce
Hyperforce Assistant
Users
Profiles
Data
Mass Transfer Approval Requests
Feature Settings
Approval Settings
Data.com
Prospector Preferences
Prospector Users
Functions
Marketing
Lead Processes
Sales
Products
Asset Settings
Product Schedules Settings
Product Settings
Sales Processes
Salesforce Scheduler
Assignment Policies



Setup
Home
Object Manager
SETUP
Profiles
Users
Profiles
Didn't find what you're looking for? Try using Global Search.
Clone Profile
Enter the name of the new profile.
You must select an existing profile to clone from.
Existing Profile
Standard User
User License
Salesforce
Profile Name
Manager
Save
Cancel

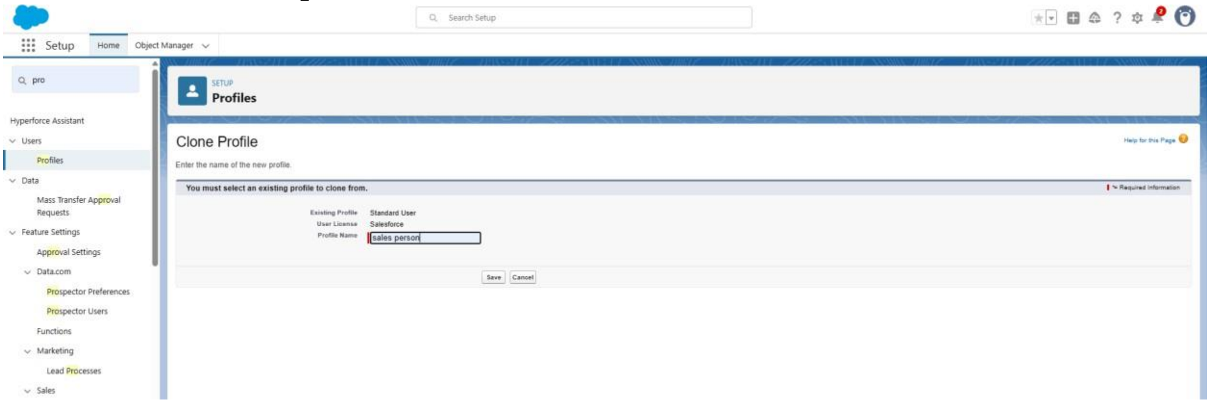


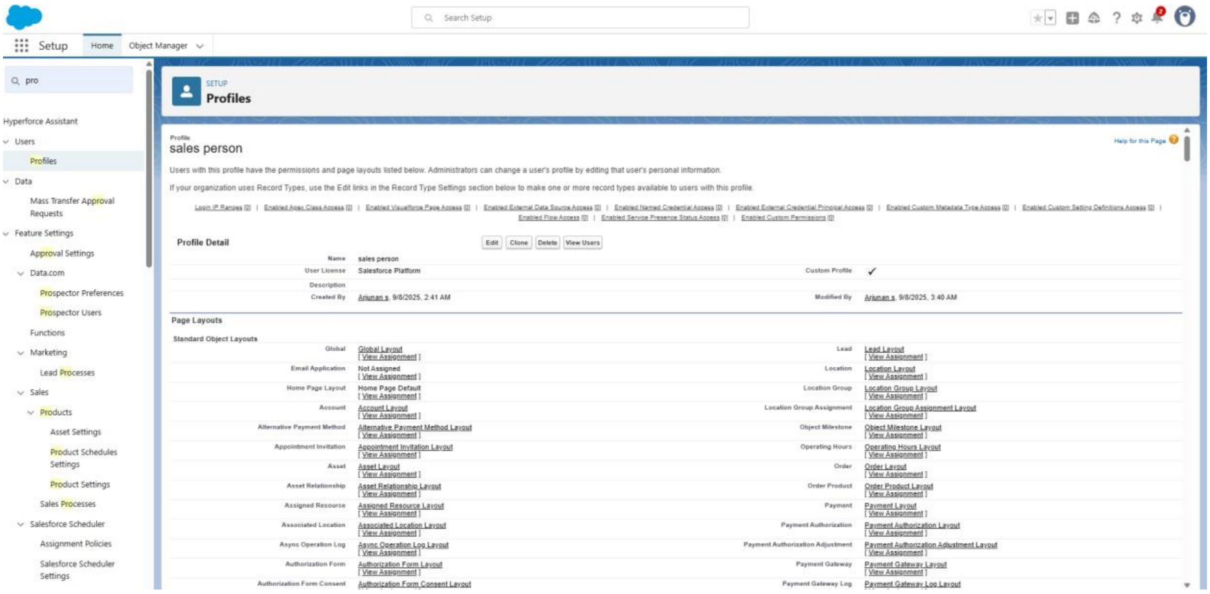
Setup
Home
Object Manager
Search Setup
SETUP
Profiles
Users
Profiles
Didn't find what you're looking for? Try using Global Search.
Profile
Manager
Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.
If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.
Profile Detail
Edit
Clone
Delete
View Users
Name
Manager
User License
Salesforce
Custom Profile
Description
Created By
Modified By
Page Layouts
Standard Object Layouts
Global
Global Layout
Email Application
Not Assigned
Home Page Layout
Home Page Default
Account
Account Layout
Alternative Payment Method
Alternative Payment Method Layout
Appointment Invitation
Appointment Invitation Layout
Asset
Asset Layout
Location Group Assignment
Location Group Assignment Layout
Macro
Macro Layout
Object Milestone
Object Milestone Layout
Operating Hours
Operating Hours Layout
Opportunity
Opportunity Layout
Opportunity Product
Opportunity Product Layout
Order
Order Layout
[View Assignment]

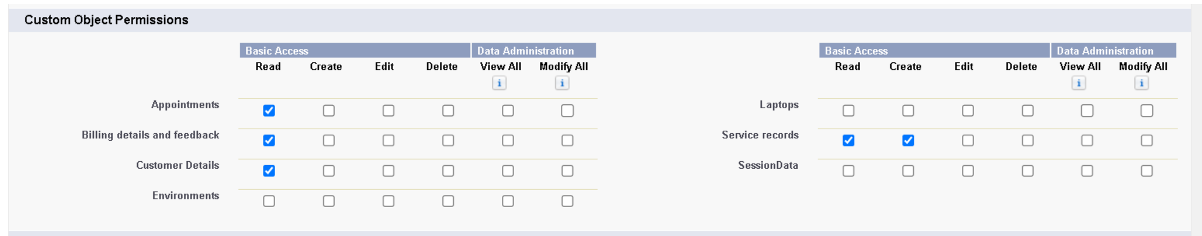


Custom Object Permissions
Basic Access
Data Administration
Read
Create
Edit
Delete
View All
Modify All
Appointments
Billing details and feedback
Customer Details
Environments
Laptops
Service records
SessionData

11.1 Created a sales person Profile



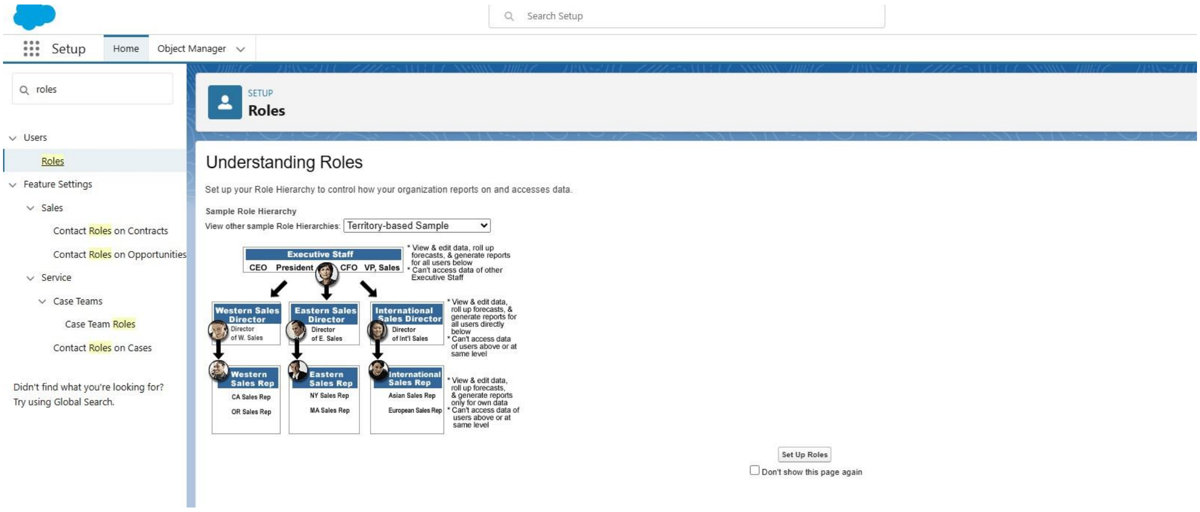


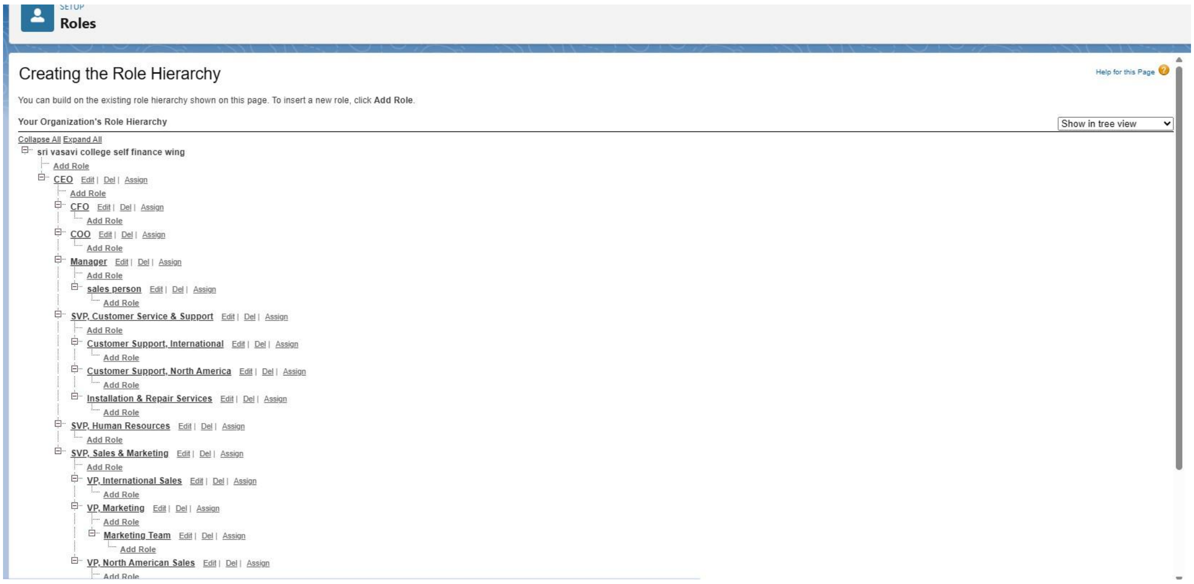


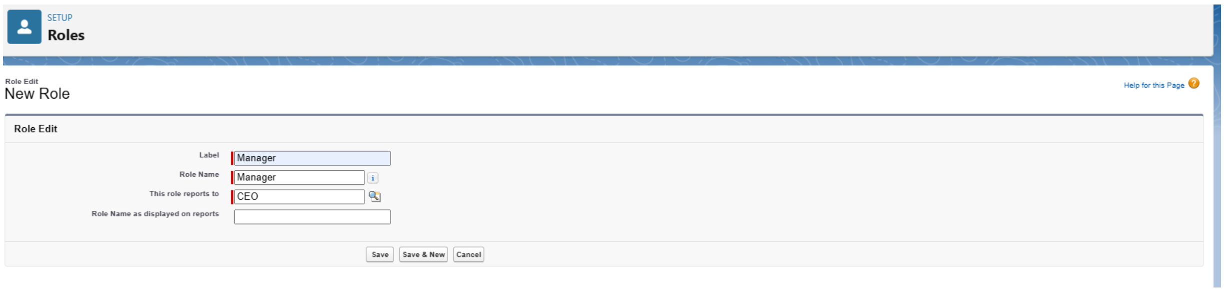
12. Created Manager Role

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.



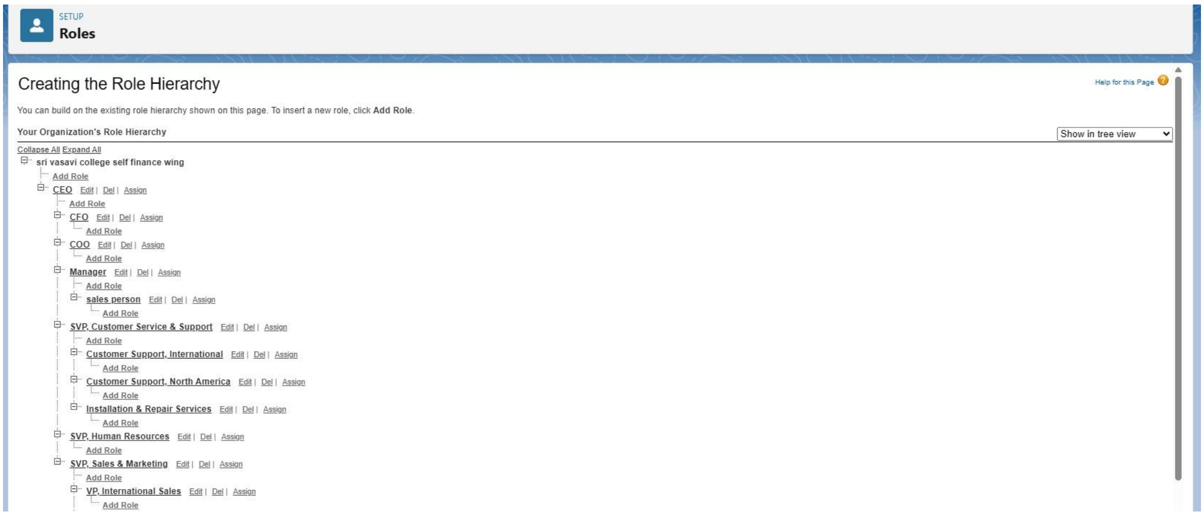




12.1. Created another roles

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.



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

13.1. Created another users

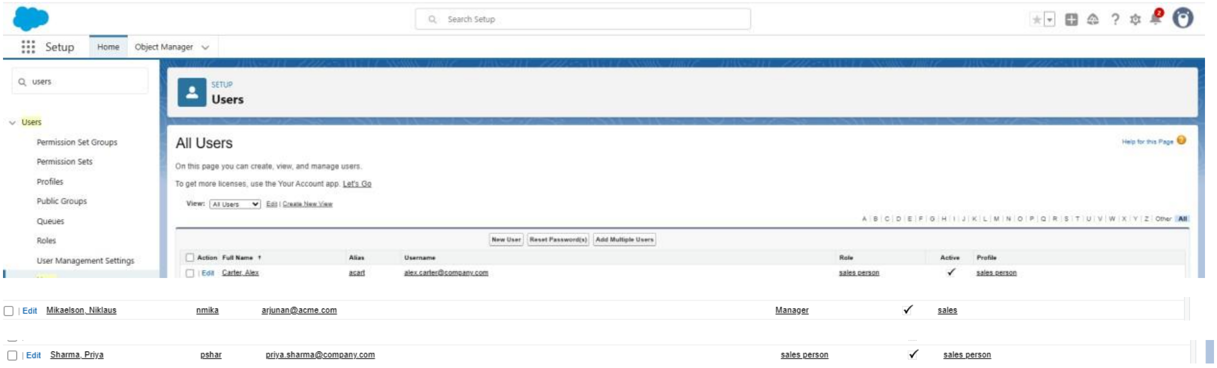
1. Repeat the steps and create another user using

a. Role : sales person

b. User licence : Salesforce Platform

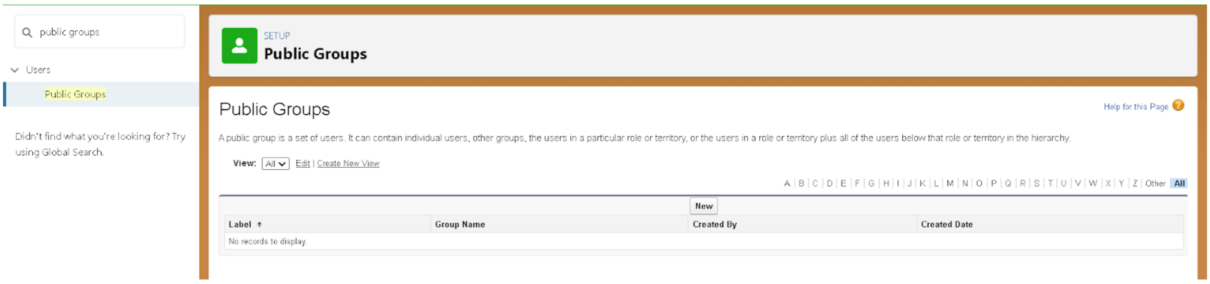
c. Profile : sales person

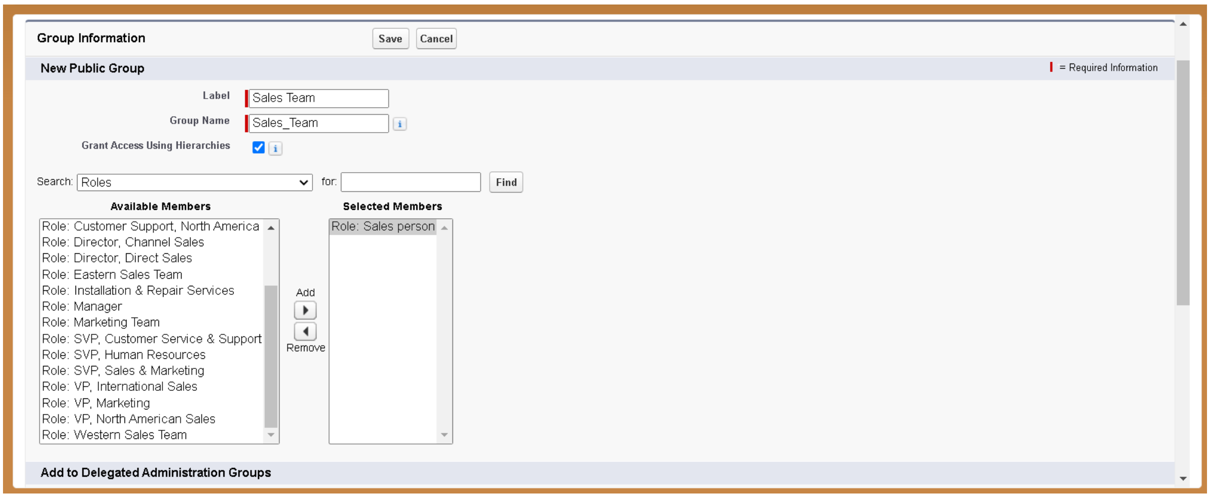
Note : created 3 users with these permissions.



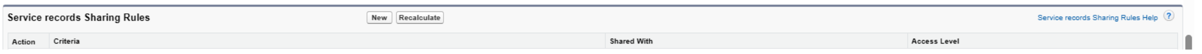
14. Created a New Public Group

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.

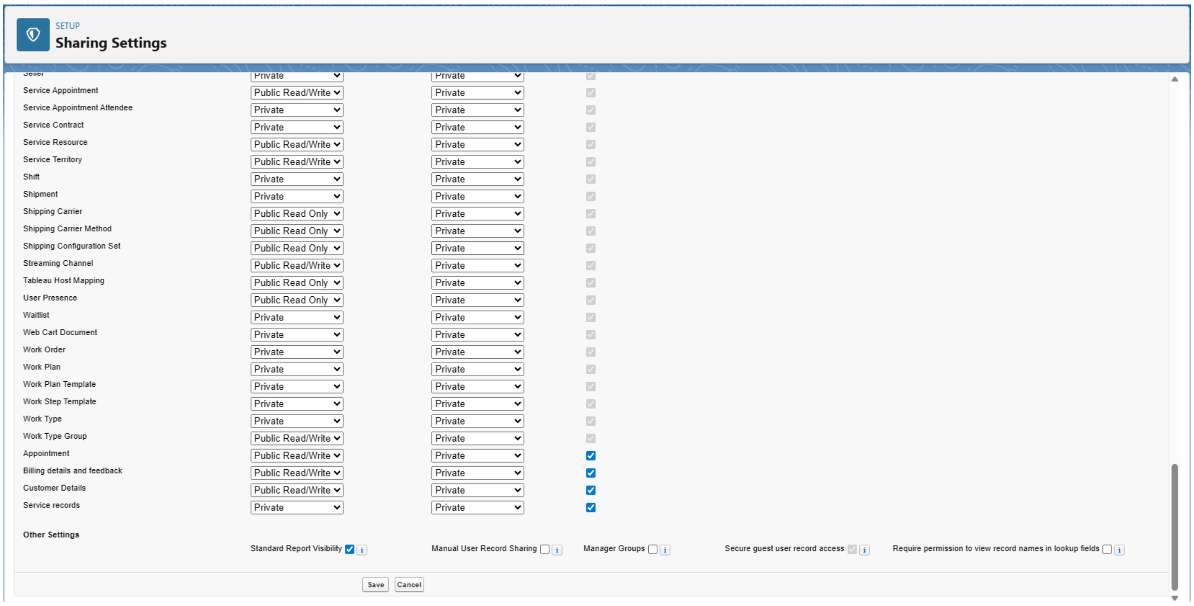


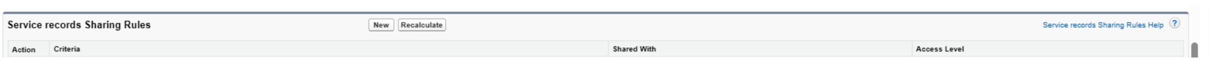


15. Creating Sharing settings

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.





16. Created a Flow

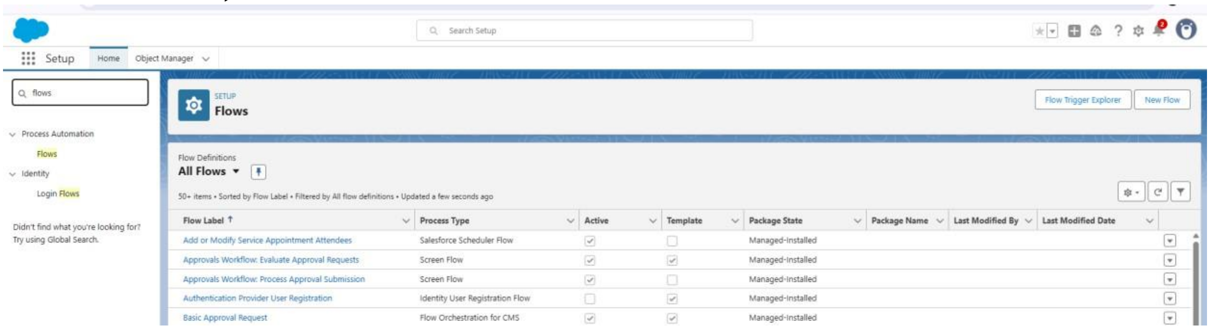
1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.
2. Select the Record-triggered flow and Click on Create.
3. Select the Object as “Billing details and feedback”in the Drop down list.
4. Select the Trigger Flow when: “A record is Created or Updated”.
5. Select the Optimize the flow for: “Actions and Related Records” and Click on Done

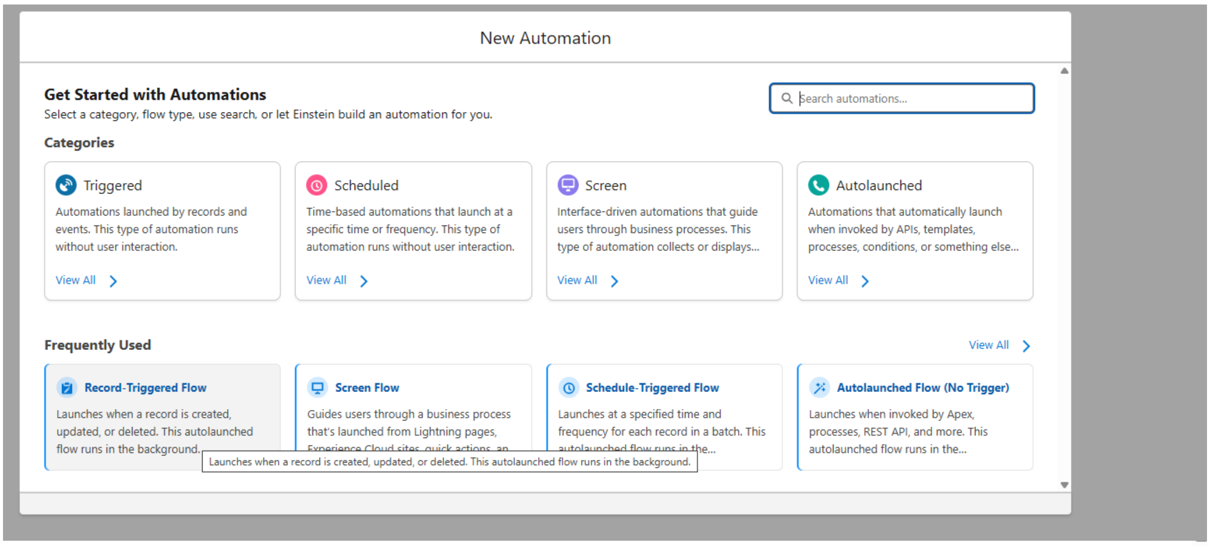
6. Under the Record-triggered Flow Click on “+” Symbol and In the Drop down List select the “Update records Element”.
7. Give the Label Name : Amount Update
8. API name : is auto populated
9. Set a filter condition : All Conditions are met(AND)
10. Field : Payment_Status__c
11. Operator : Equals
12. 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},

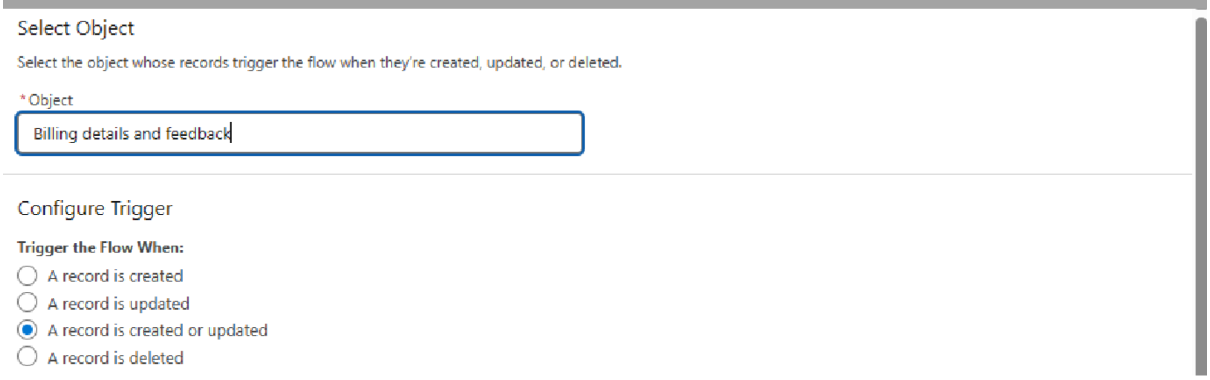
24. I hope this message finds you well. I wanted to take a moment to express my sincere gratitude for your recent payment for the services provided by our garage management team. Your prompt payment is greatly appreciated, and it helps us continue to provide top-notch services to you and all our valued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

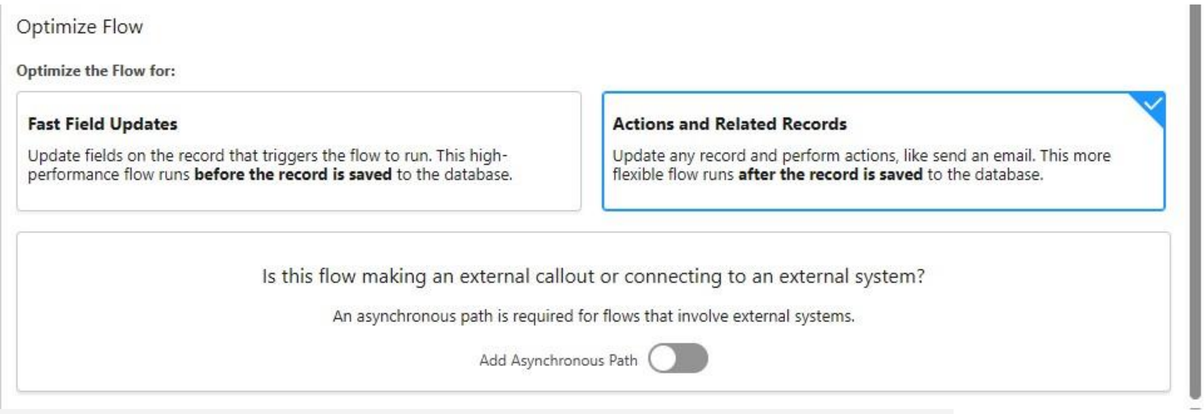
25. Amount paid : {!$Record.Payment_Paid__c}
26. Thank you for Coming .
27. Click done.
28. Now Click on Add Element , select Action.
29. Their action bar will be opened in that search for “ send email ” and click on it.
30. Give the label name as “ Email Alert”
31. API name will be auto populated.
32.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

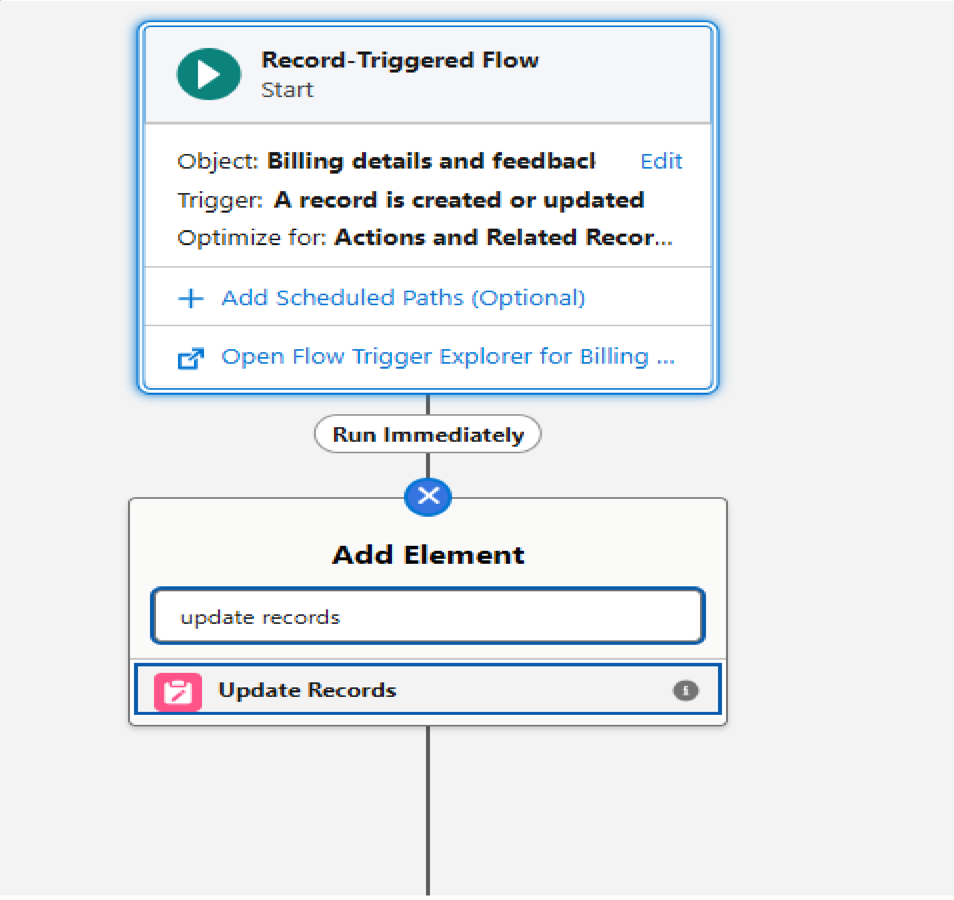
34. Include recipient address list select the email form the record.
35. RecipientAddressList: {!$Record.Service_records__r.Appointment__r.Customer_Name__r.Gmail__c}
36. Include subject as “ Thank You for Your Payment - Garage Management”.
37. Click done.
38. Click on save. Give the Flow label , Flow Api name will be autopopulated.
39. And click save, and click on activate.

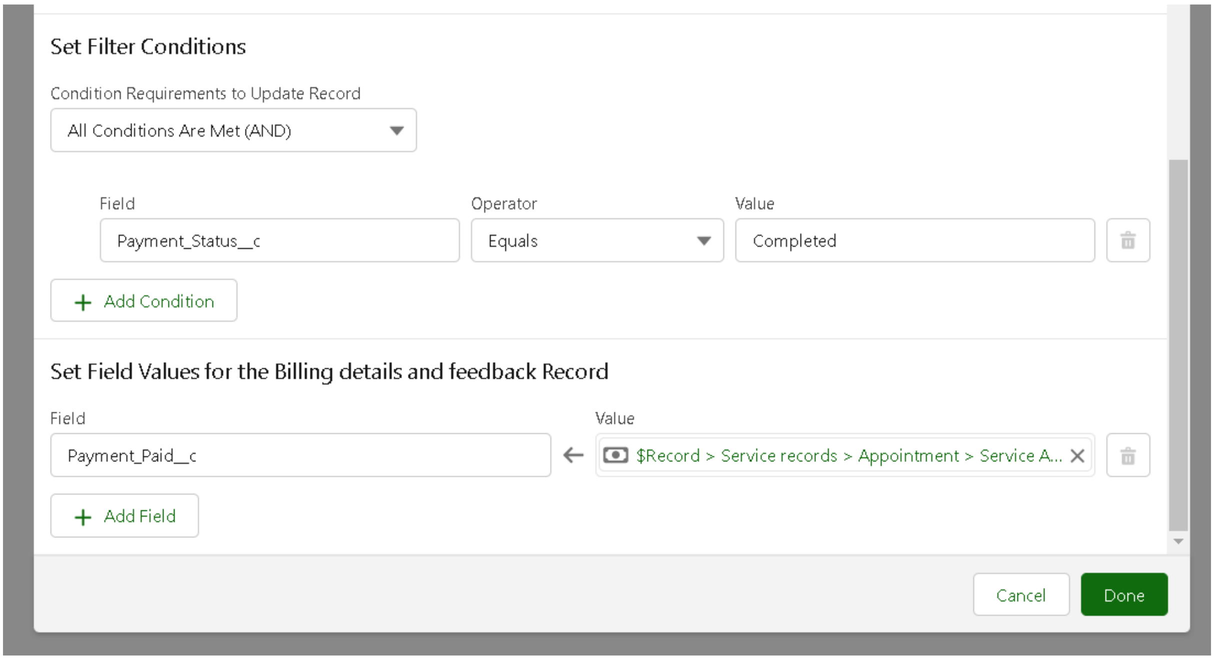


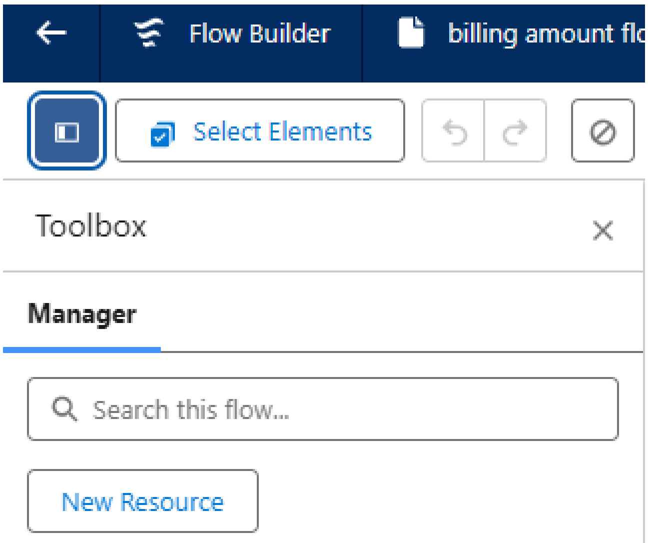


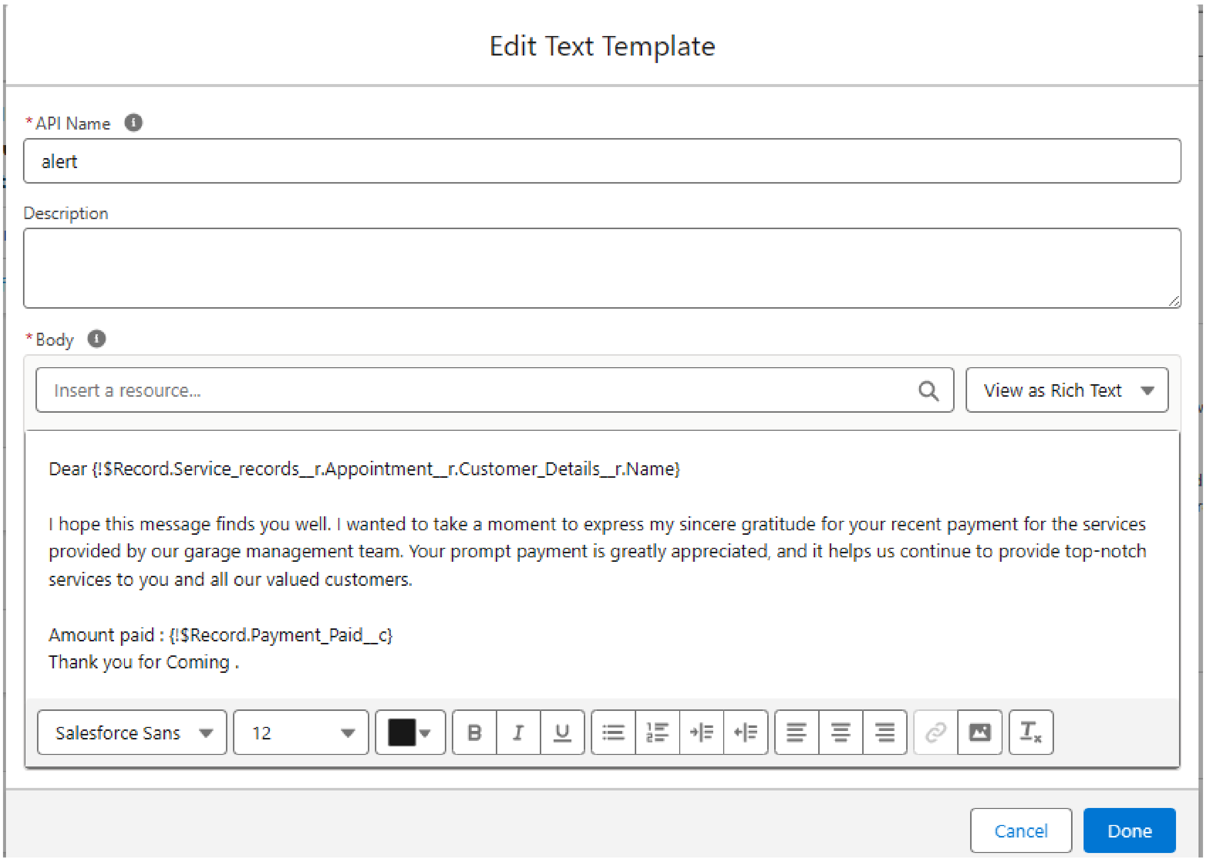


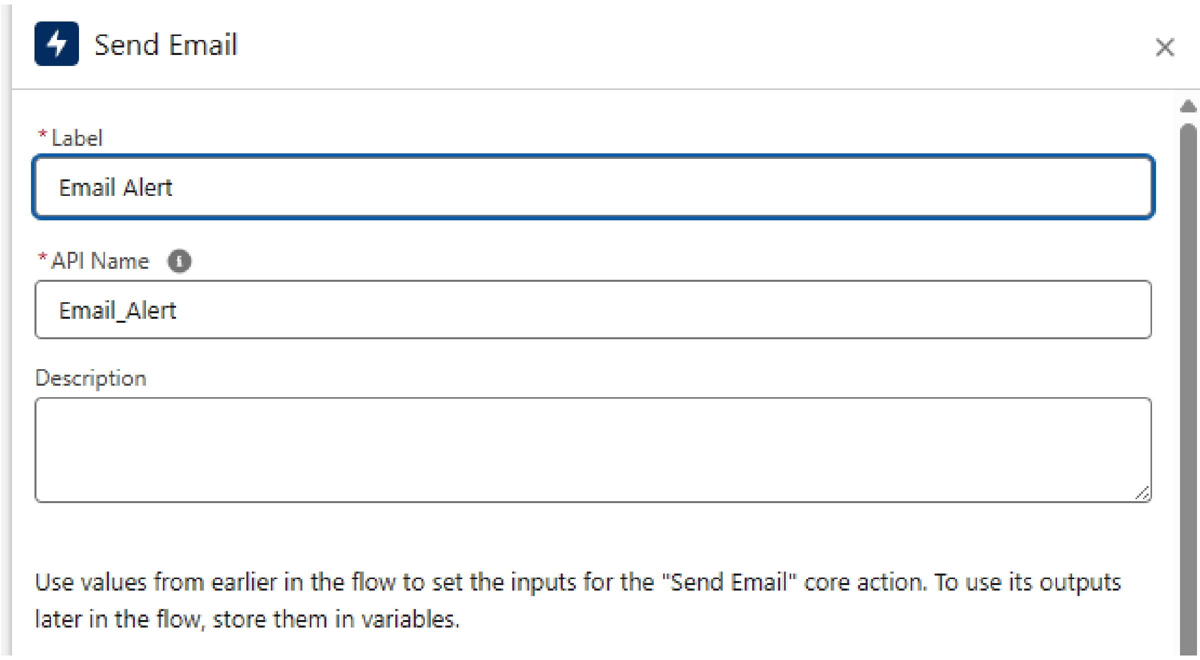

Optimize Flow
Optimize the Flow for:
Fast Field Updates
Update fields on the record that triggers the flow to run. This high-performance flow runs before the record is saved to the database.
Actions and Related Records
Update any record and perform actions, like send an email. This more flexible flow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

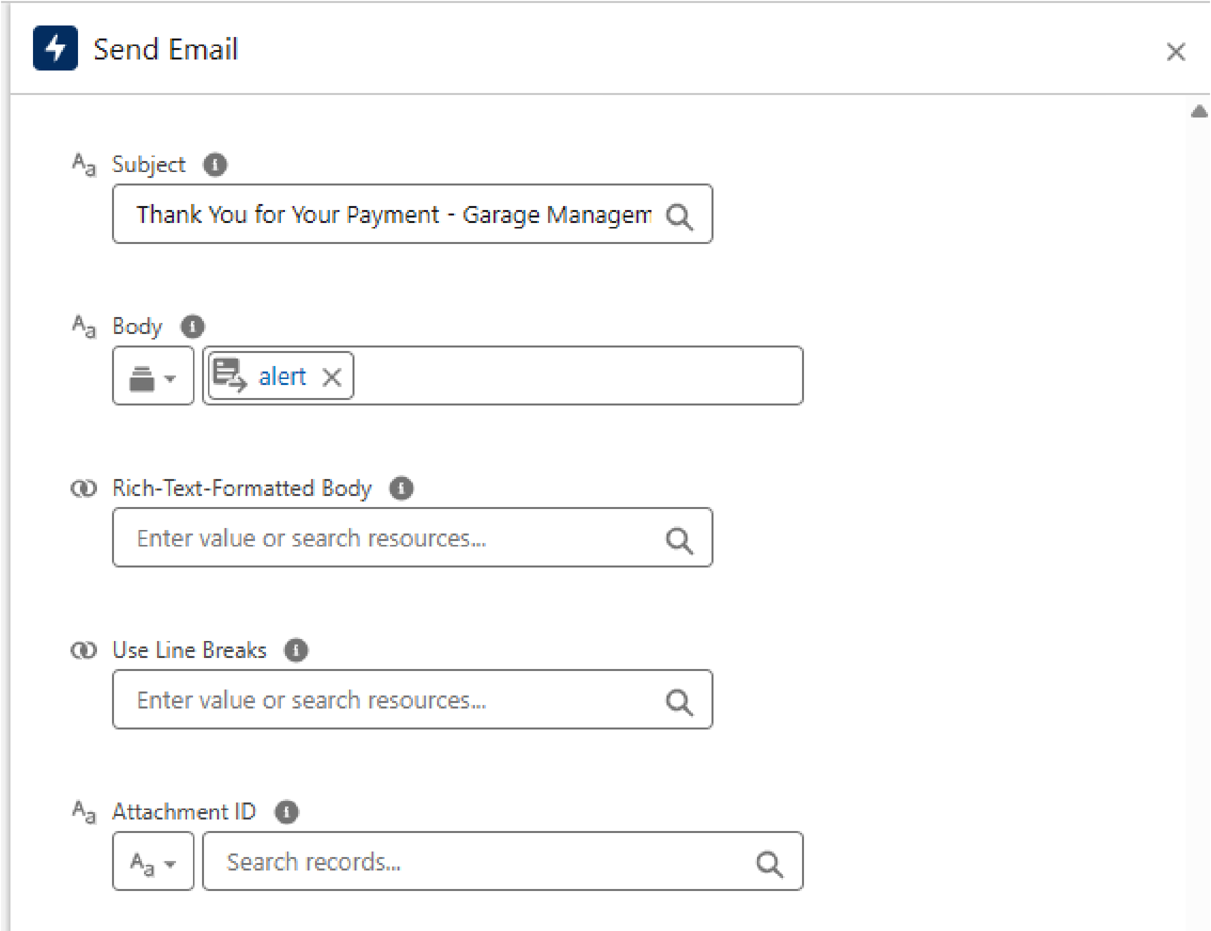

Record-Triggered Flow
Start
Object: Billing details and feedbacl
Edit
Trigger: A record is created or updated
Optimize for: Actions and Related Recor...
Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Billing ...
Run Immediately
Add Element
update records
Update Records

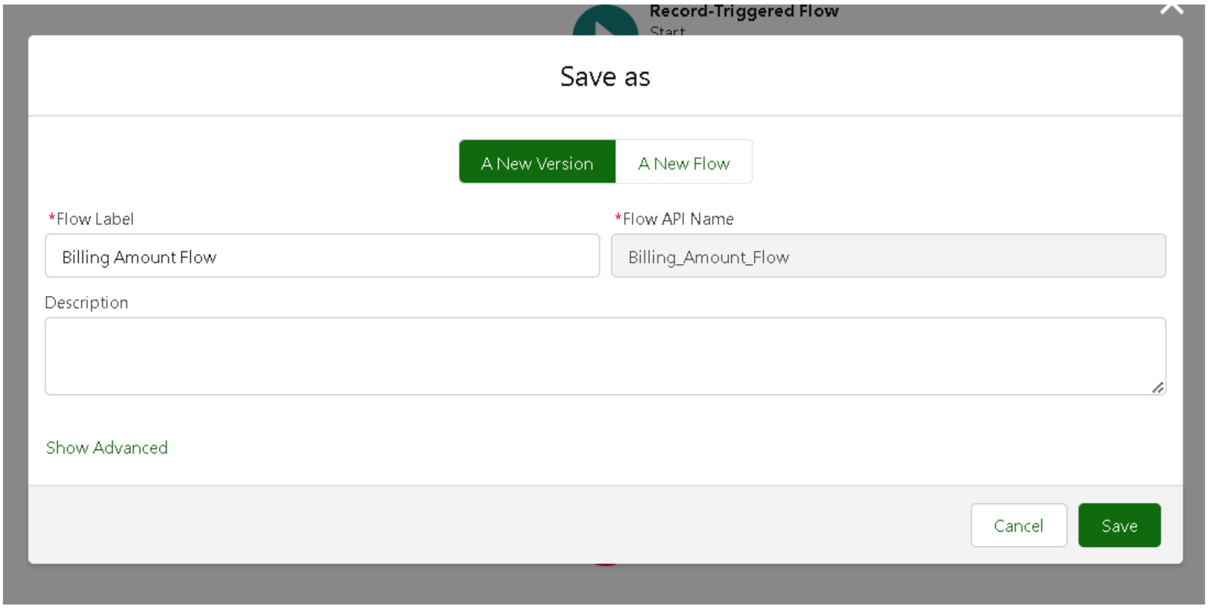

Set Filter Conditions
Condition Requirements to Update Record
All Conditions Are Met (AND)
Field
Operator
Value
Payment_Status__c
Equals
Completed
Add Condition
Set Field Values for the Billing details and feedback Record
Field
Value
Payment_Paid__c
$Record > Service records > Appointment > Service A...
Add Field
Cancel
Done


Flow Builder
billing amount flo
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.

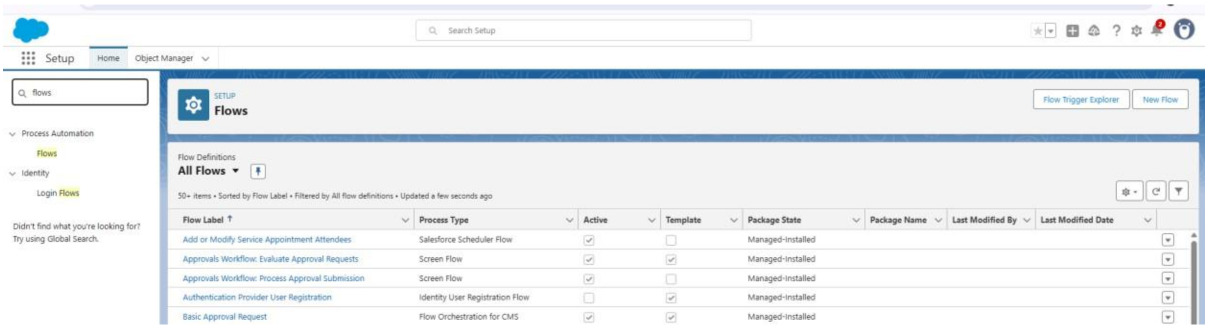

Send Email
Subject
Thank You for Your Payment - Garage Managem
Body
alert
Rich-Text-Formatted Body
Enter value or search resources...
Use Line Breaks
Enter value or search resources...
Attachment ID
Search records...

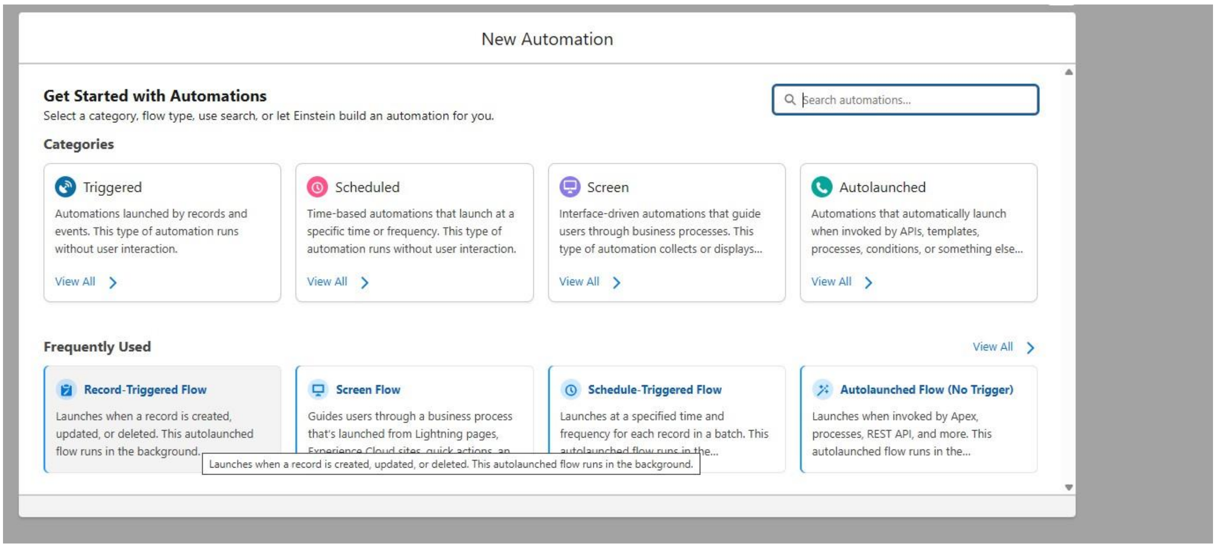

Record-Triggered Flow
Save as
A New Version
A New Flow
*Flow Label
Billing Amount Flow
*Flow API Name
Billing_Amount_Flow
Description
Show Advanced
Cancel
Save

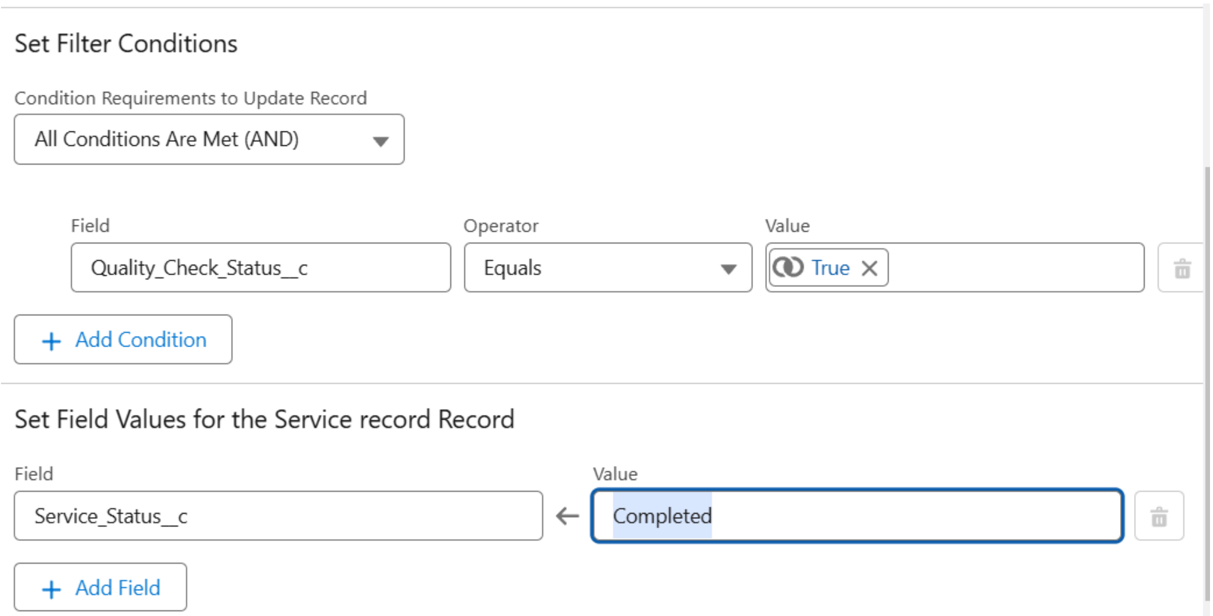
1. **16.1Created another Flow**

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.



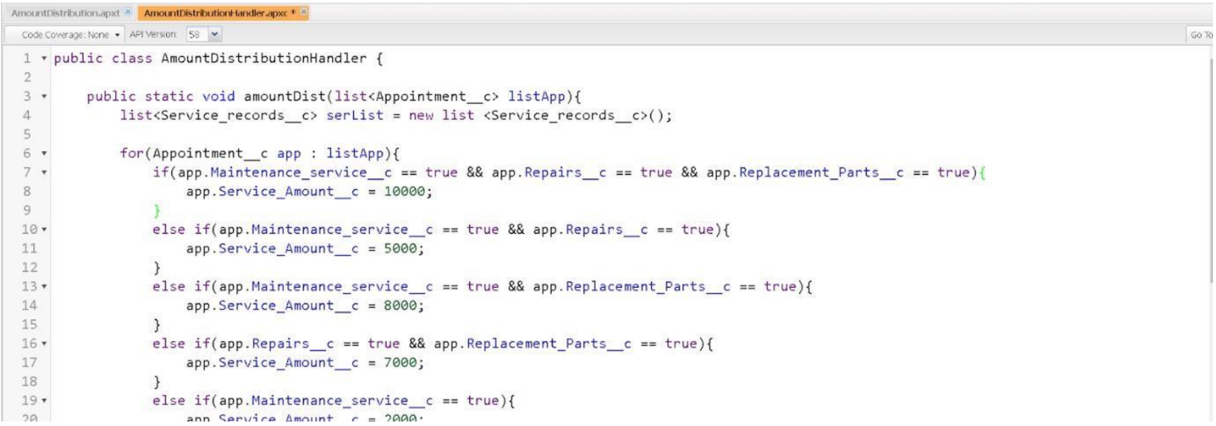


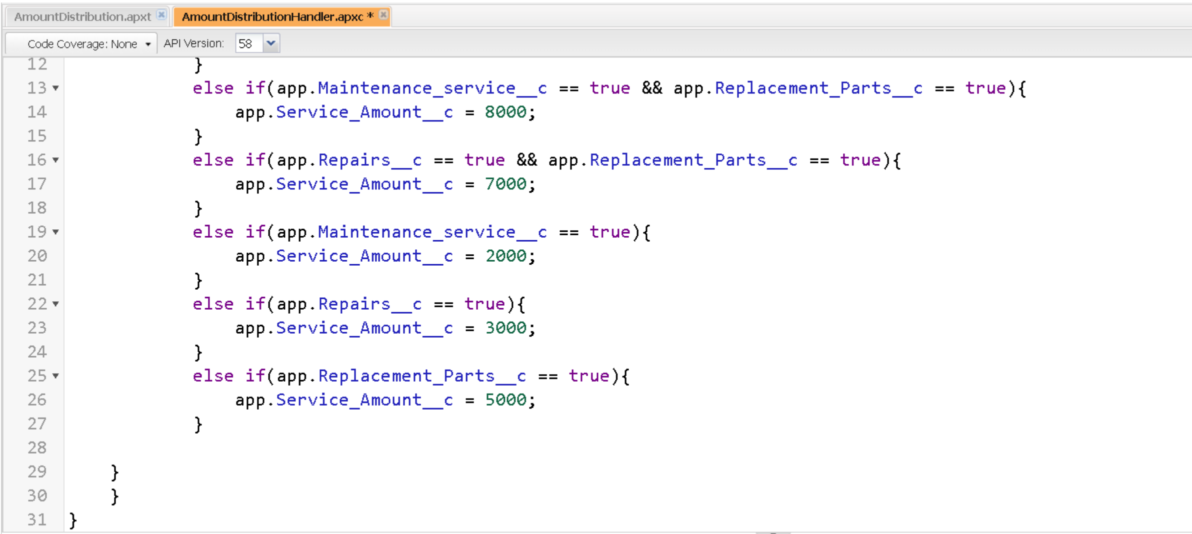


17. Apex handler

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 ”.





Code:

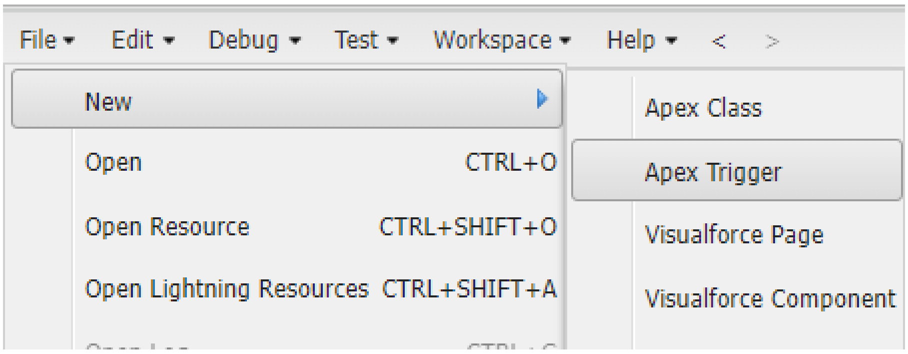
```
public class AmountDistributionHandler {
    public static void amountDist(list<Appointment__c> listApp){
        list<Service_records__c> serList = new list <Service_records__c>();
```

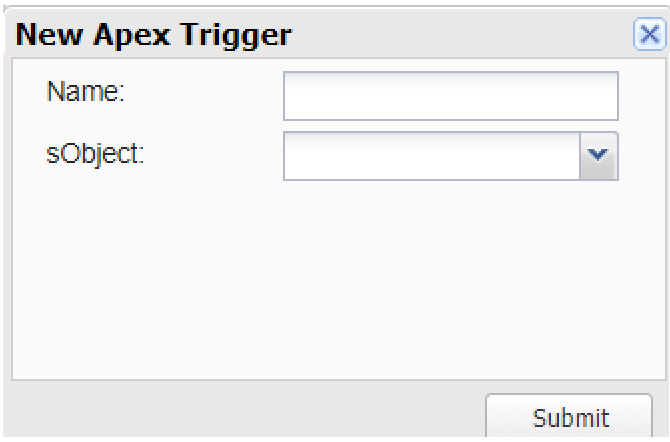
```
    for(Appointment__c app : listApp){
        if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){
            app.Service_Amount__c = 10000;
        }
        else if(app.Maintenance_service__c == true && app.Repairs__c == true){
            app.Service_Amount__c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





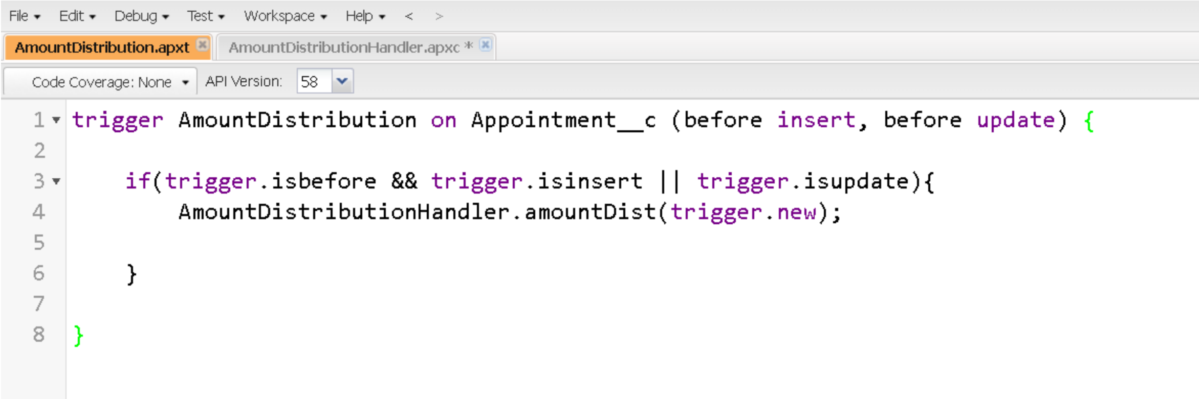
Syntax For creating trigger :

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

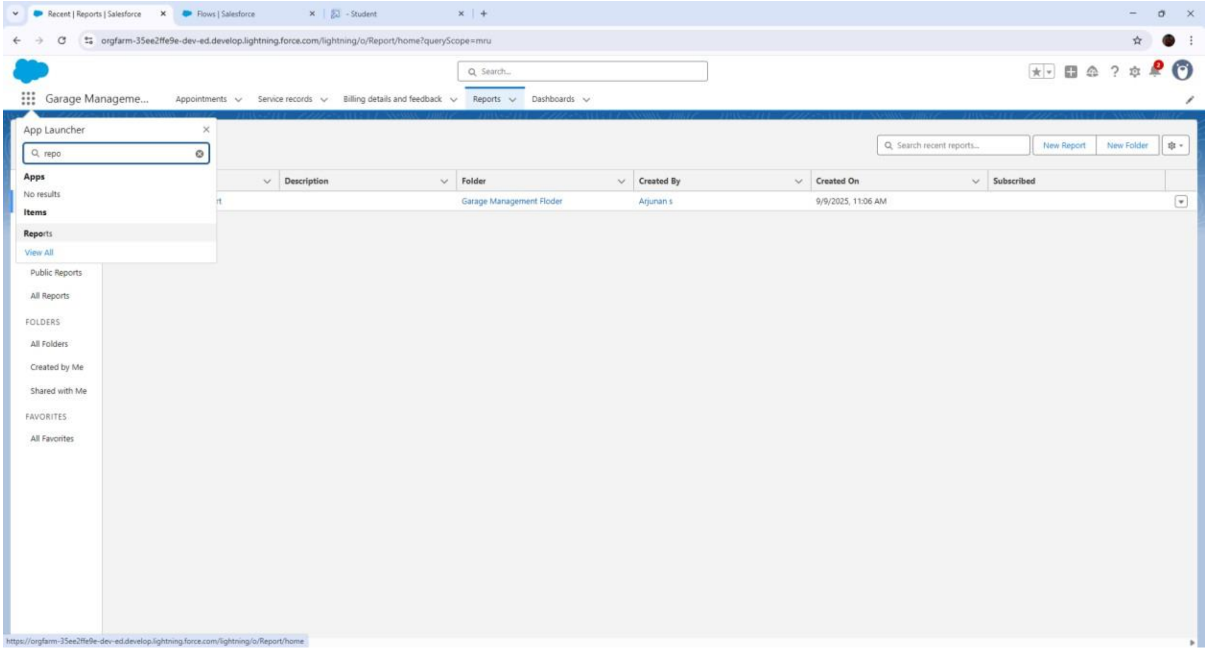


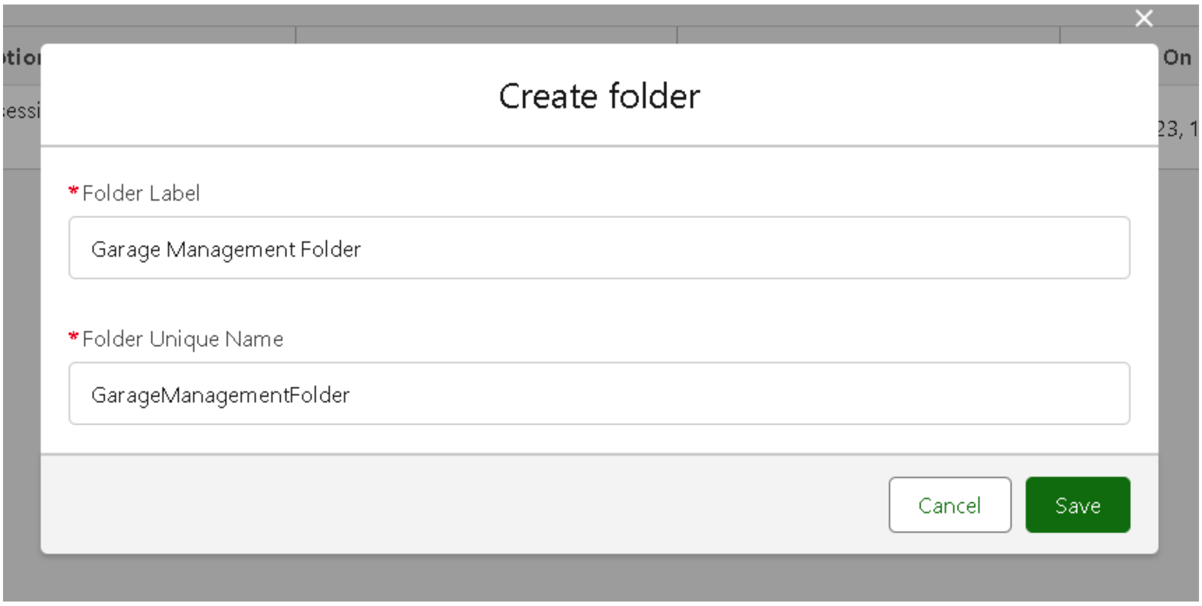
Code:

```
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

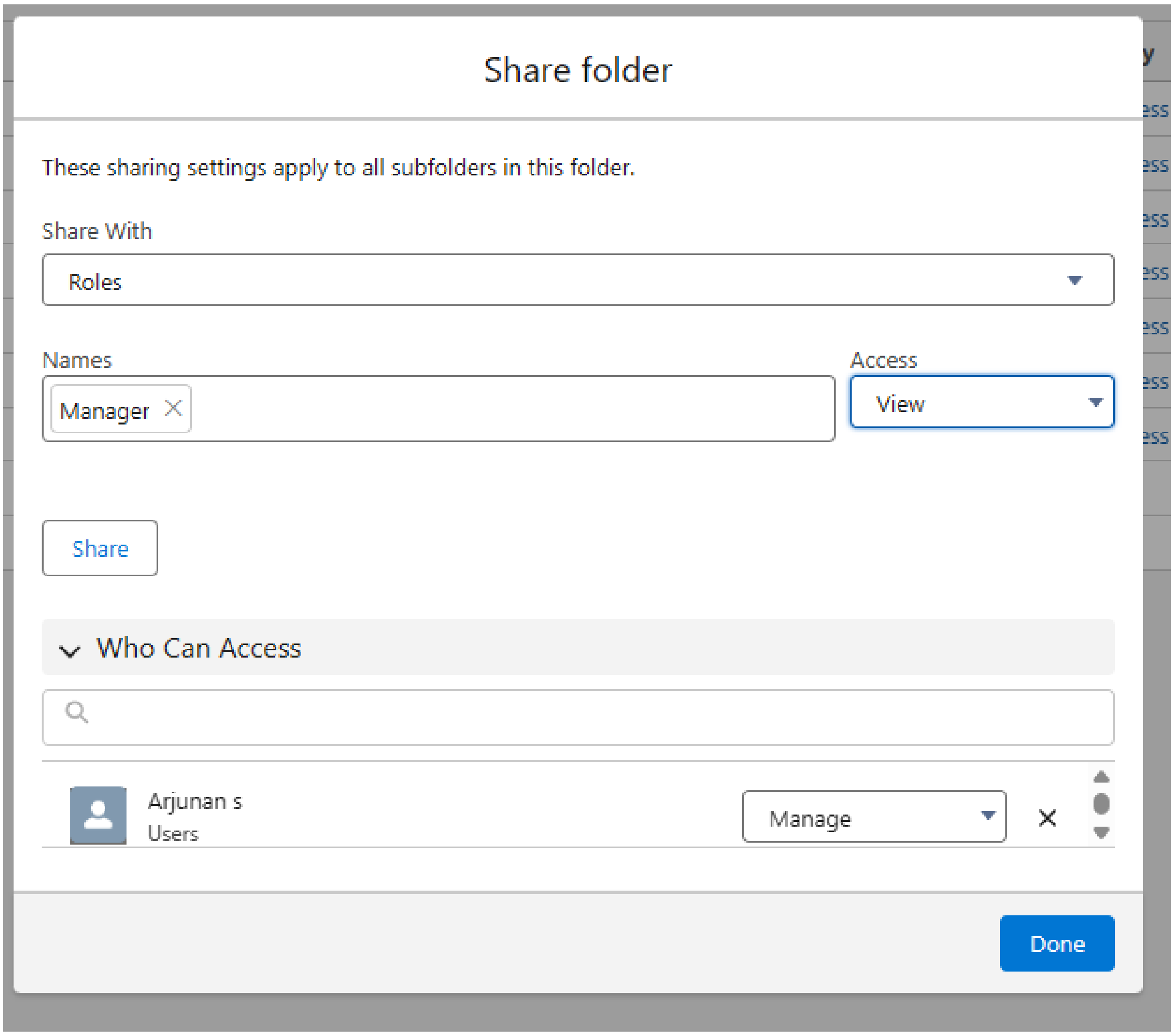
1. Click on the app launcher and search for reports.
2. Click on the report tab, click on new folder.
3. Give the Folder label as “Garage Management Folder”, Folder unique name will be auto populated.
4. Click save.





18.1. Shared a report folder

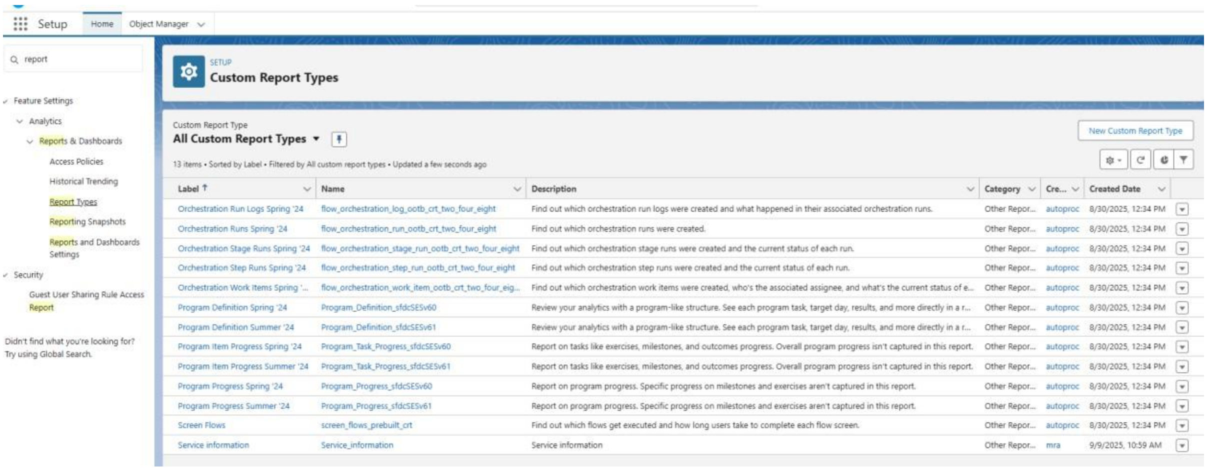
1. Go to the app >> click on the reports tab.
2. Click on the All folder , click on the Drop down arrow for Garage Management folder, and Click on share.
3. Select the share with as “roles”, in name field search for “manager”, give “view” as access for that role.
4. Then click share, and click on Done.

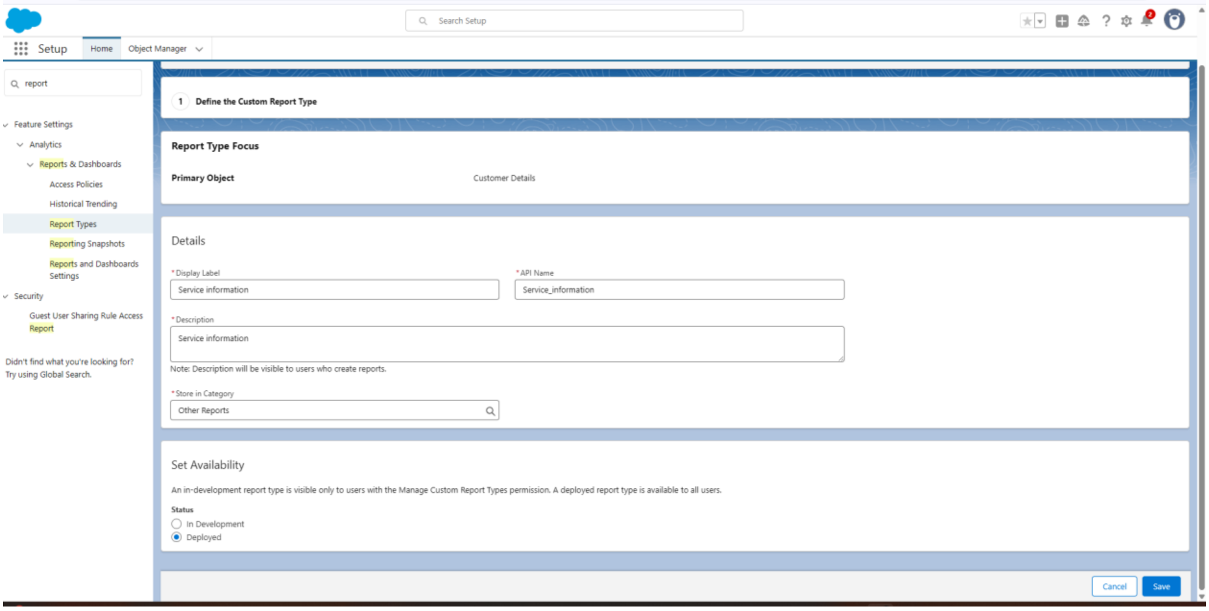


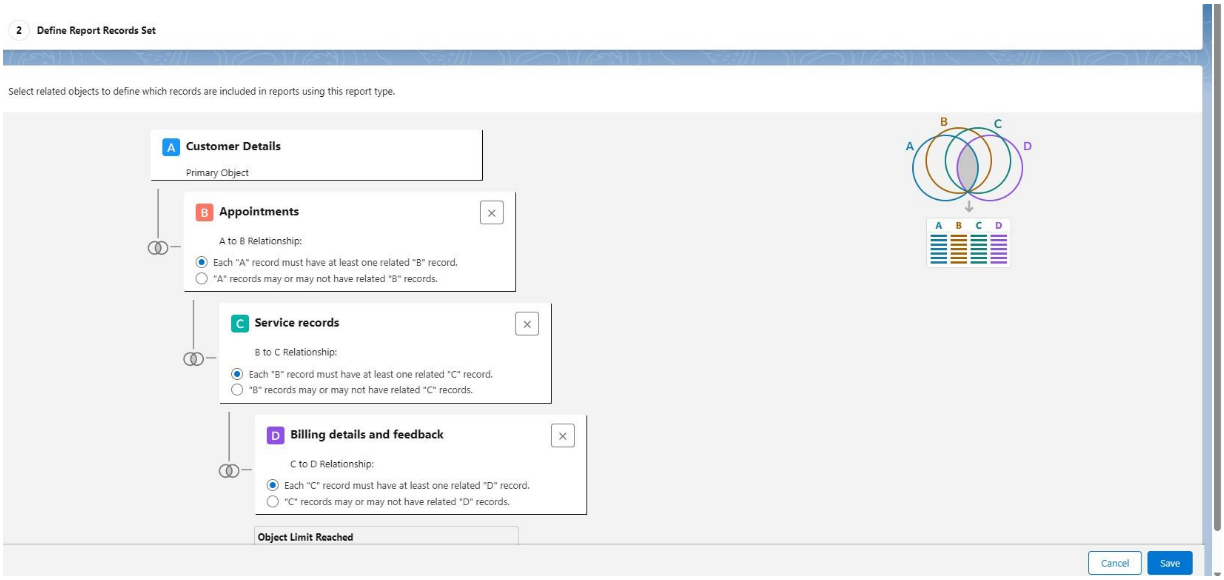
18.2. Created Report Type

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.





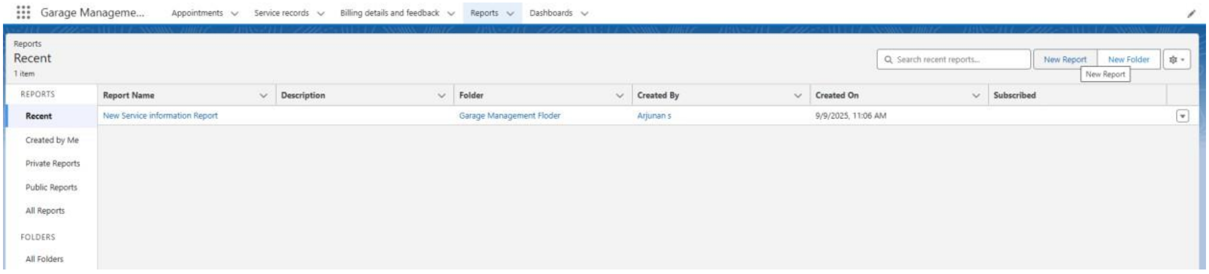


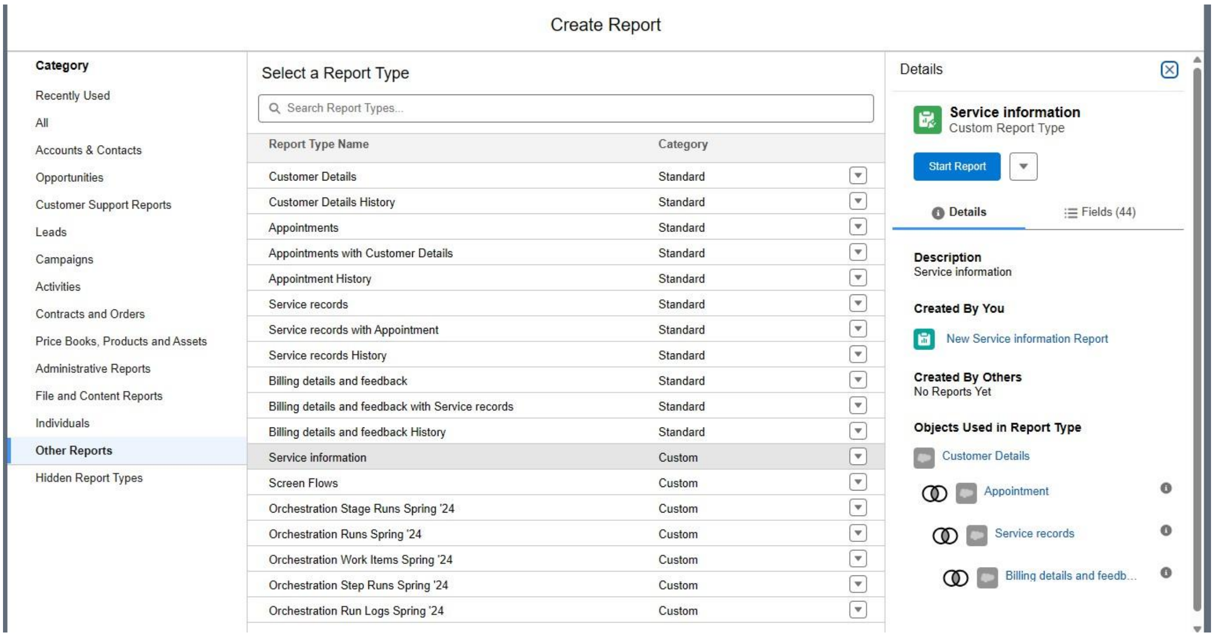
18.3. CreatedReport

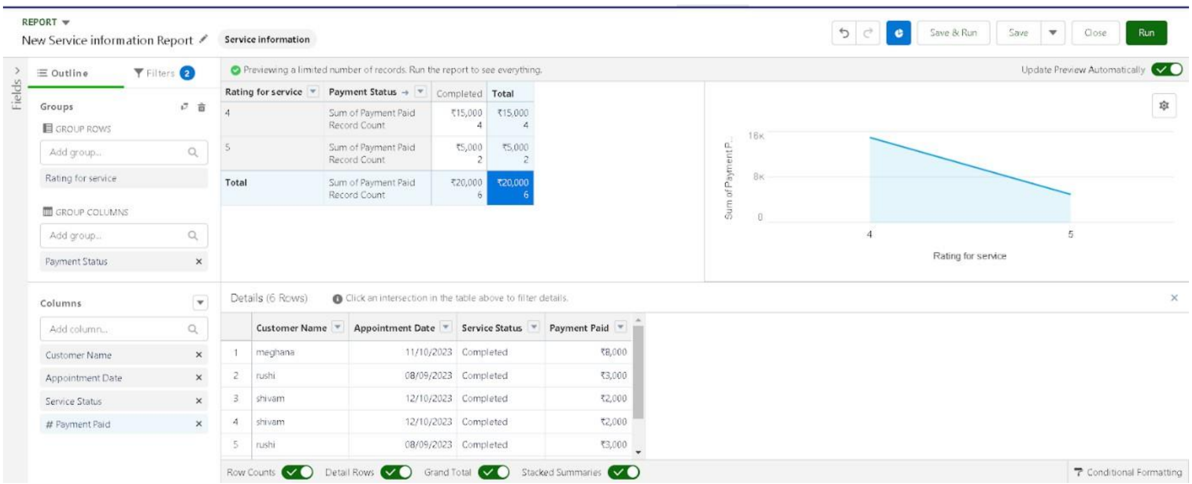
Note : Before creating report, create latest “10” records in every object.
Try to fill every field in each record for better experience.

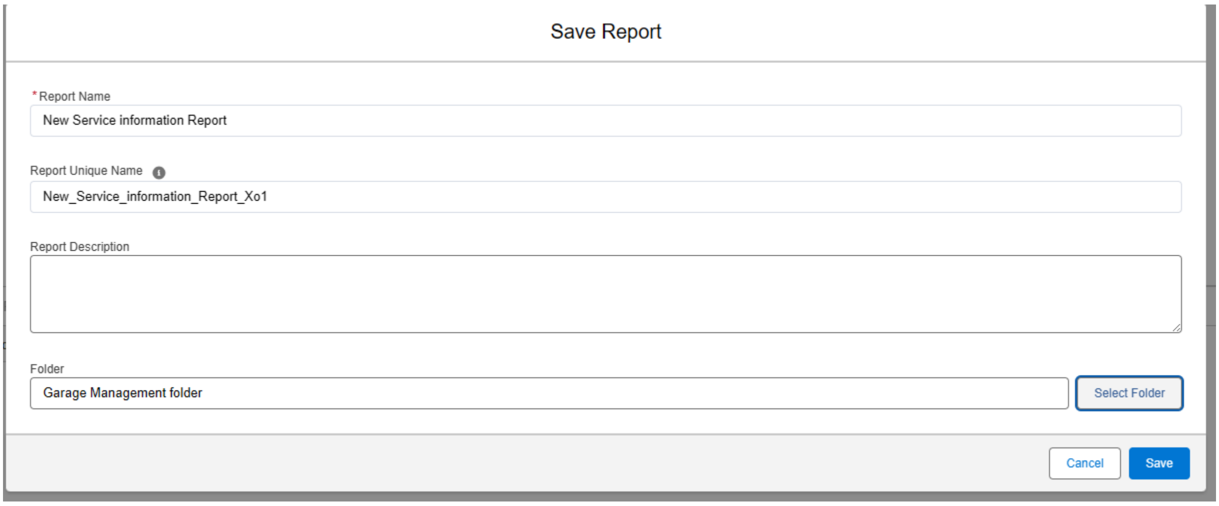
1. Go to the app >> click on the reports tab
2. Click New Report.
3. Select the Category as other reports, search for Service Information, select that report, click on it. And click on start report.
4.
5. Their outline pane is opened alredy, select the fields that mentioned below in column section.
   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.



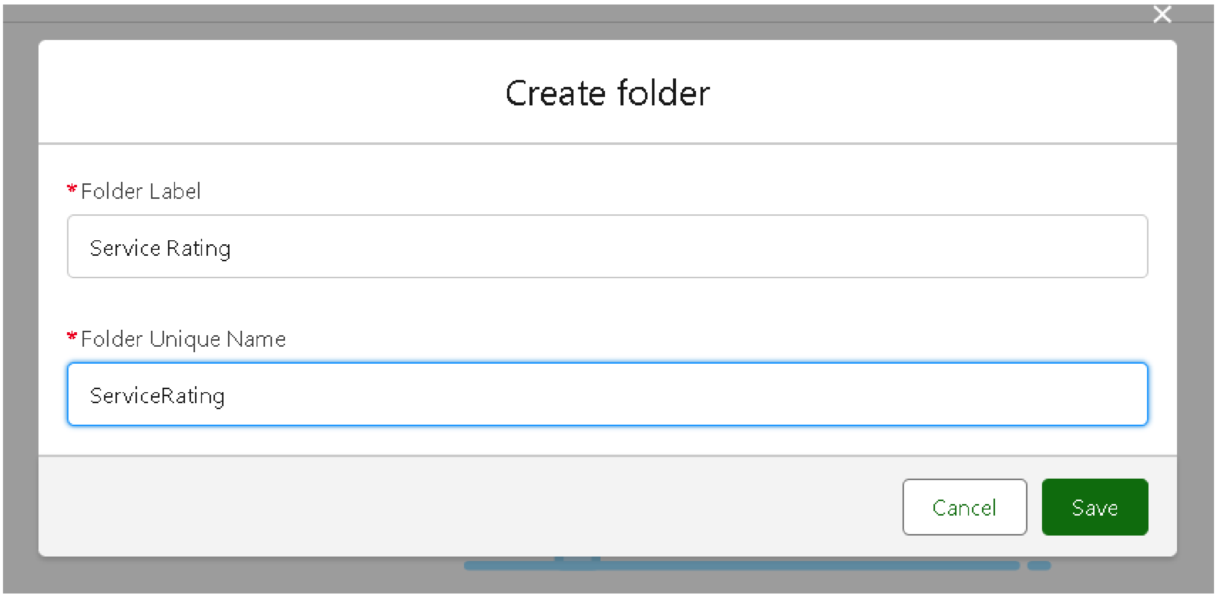






19. Created Dashboard Folder

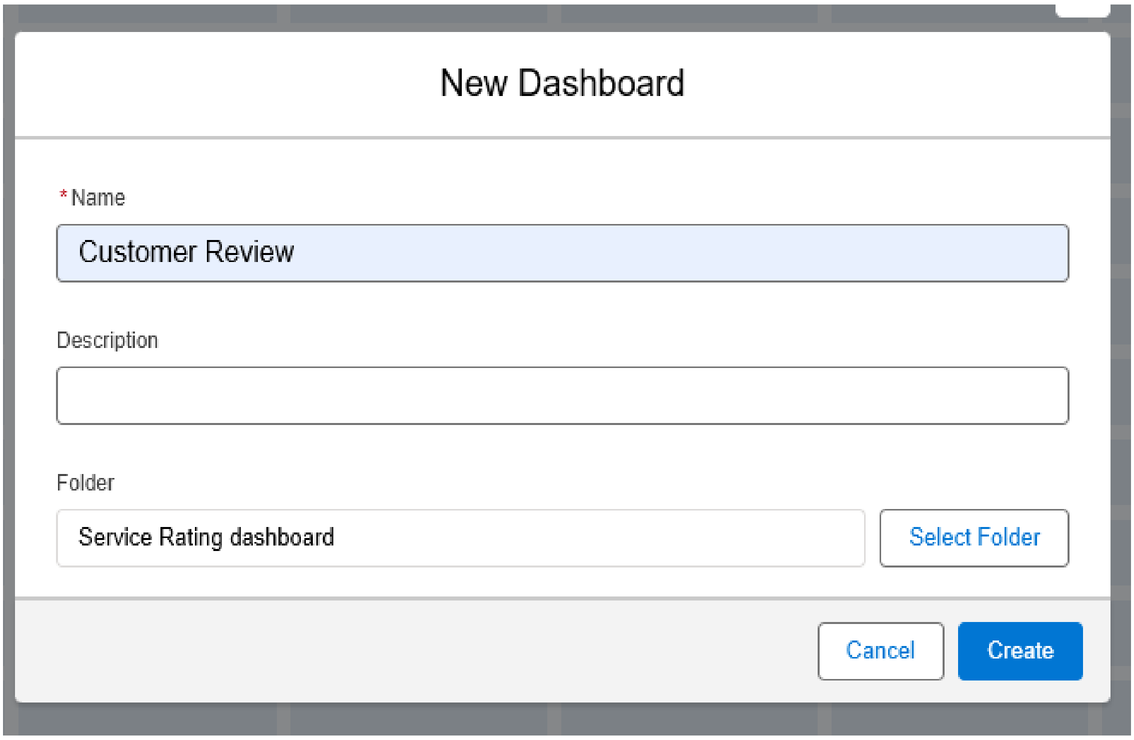
1. Click on the app launcher and search for dashboard.
2. Click on dashboard tab.
3. Click new folder, give the folder label as " Service Rating dashboard".
4. Folder unique name will be auto populated.
5. Click save.

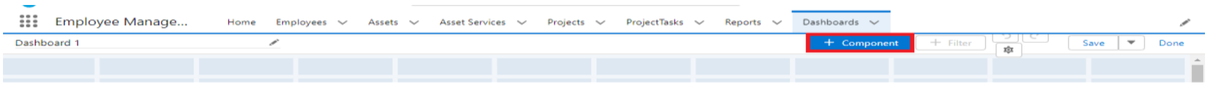


6. Follow the same steps, from Reports Milestone and Activity 2, and provide the sharing settings for the folder that was just created.

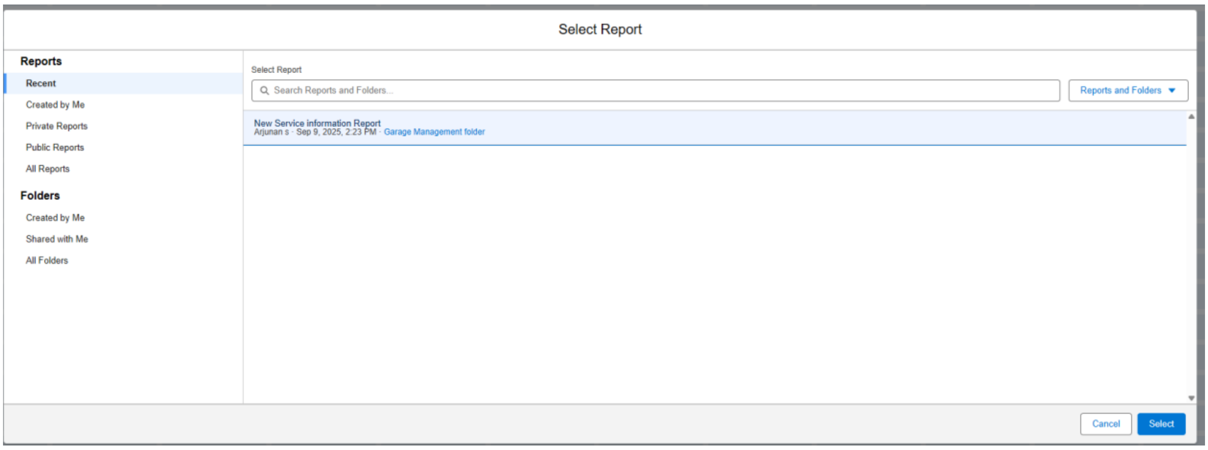
19.1 Create Dashboard

1. Go to the app >> click on the Dashboards tabs.
2. Give a Name and select the folder that created, and click on create.
3. Select add component,

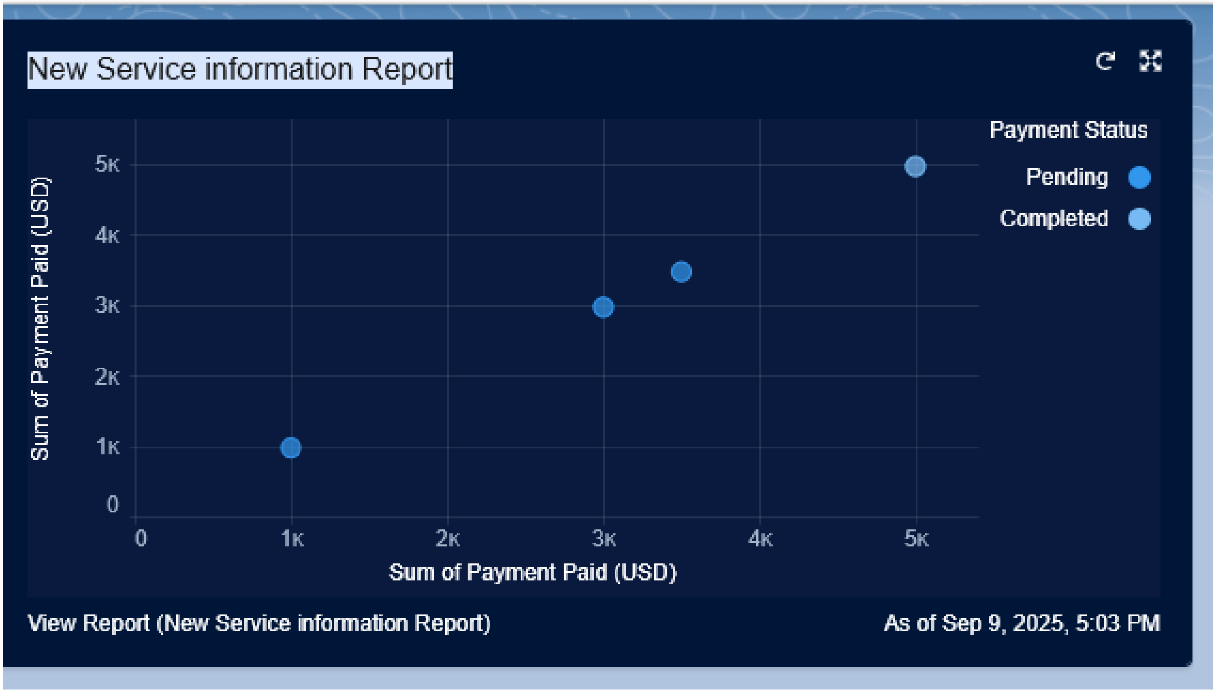
3. 

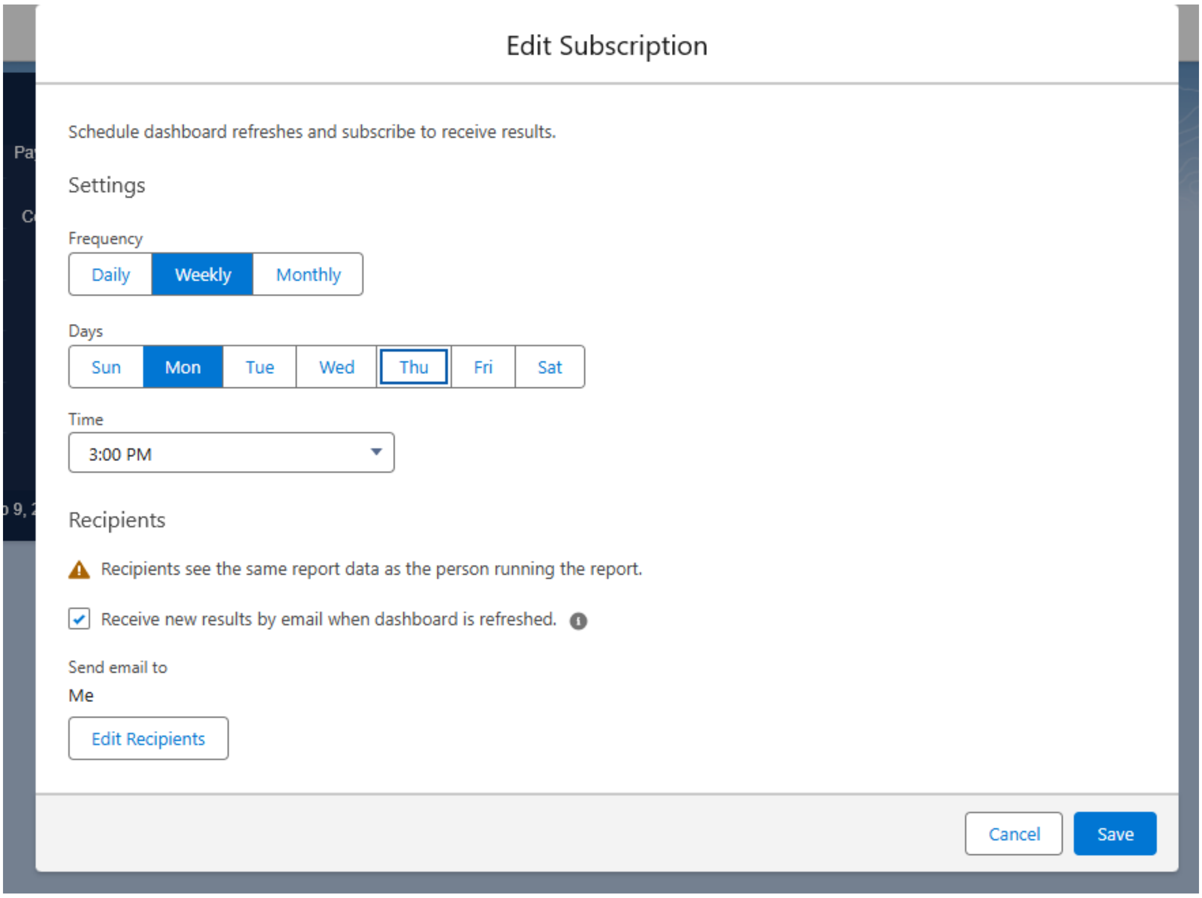


4. Select a Report and click on select.



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


New Service information Report
Payment Status
Pending
Completed
Sum of Payment Paid (USD)
5K
4K
3K
2K
1K
0
0
1K
2K
3K
4K
5K
Sum of Payment Paid (USD)
View Report (New Service information Report)
As of Sep 9, 2025, 5:03 PM

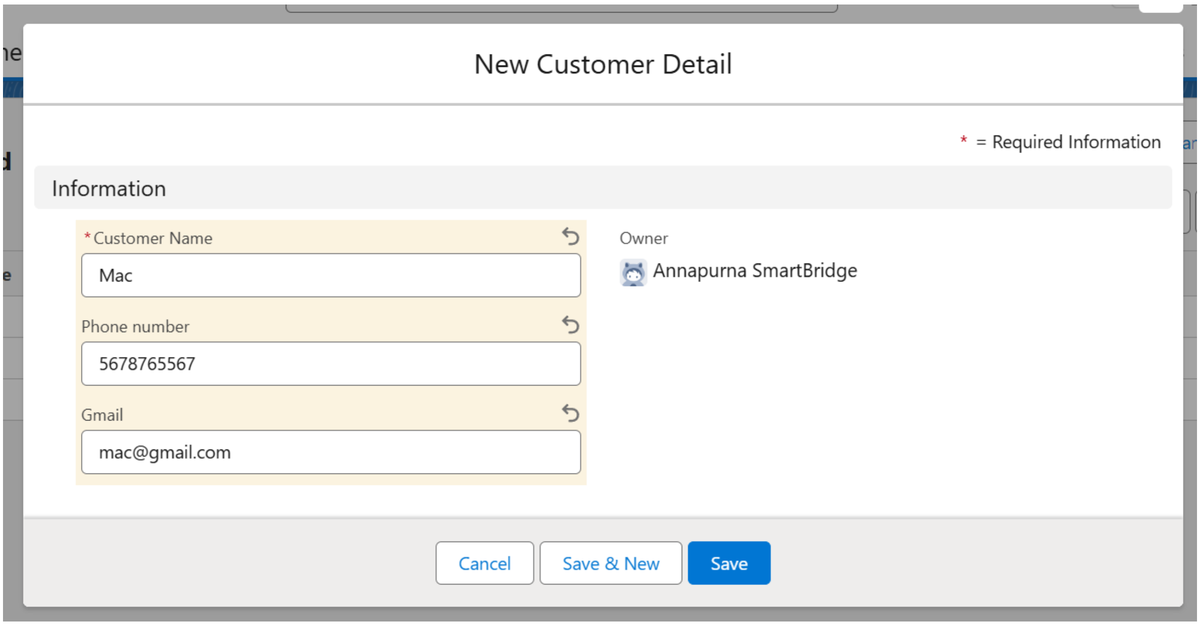

Edit Subscription
Schedule dashboard refreshes and subscribe to receive results.
Settings
Frequency
Daily
Weekly
Monthly
Days
Sun
Mon
Tue
Wed
Thu
Fri
Sat
Time
3:00 PM
Recipients
Recipients see the same report data as the person running the report.
Receive new results by email when dashboard is refreshed.
Send email to
Me
Edit Recipients
Cancel
Save

20. User Adoption

Created Records

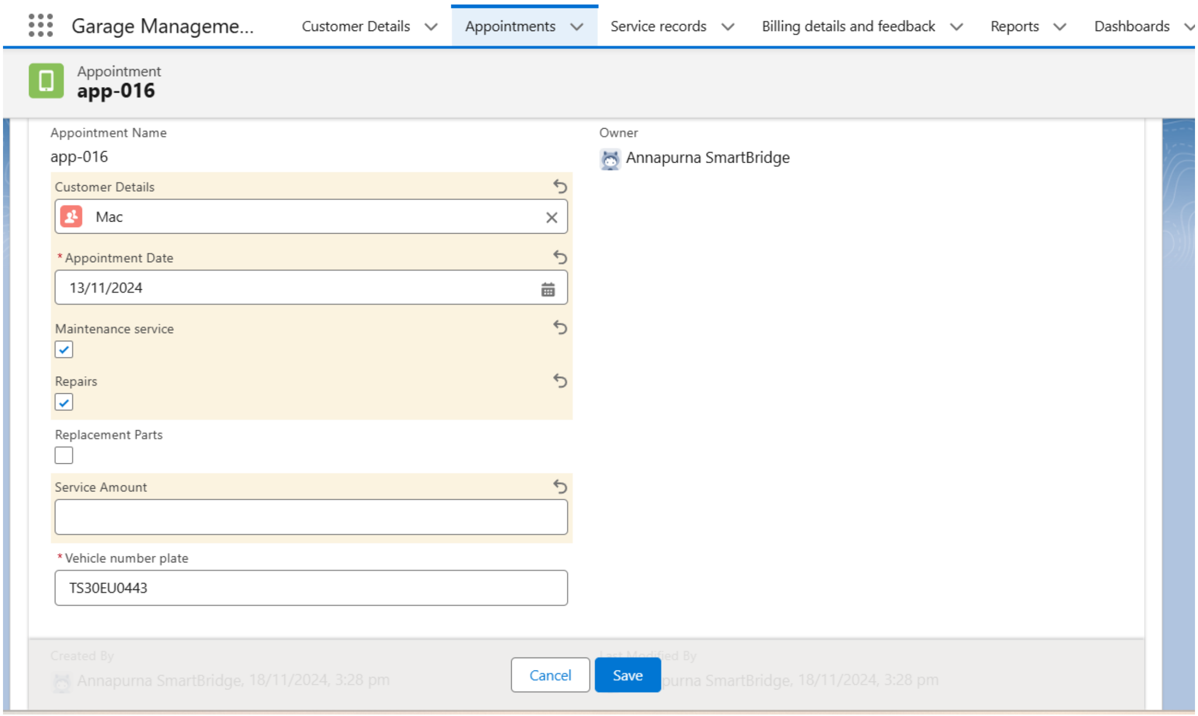
To create a record in the follow objects follow these steps

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.



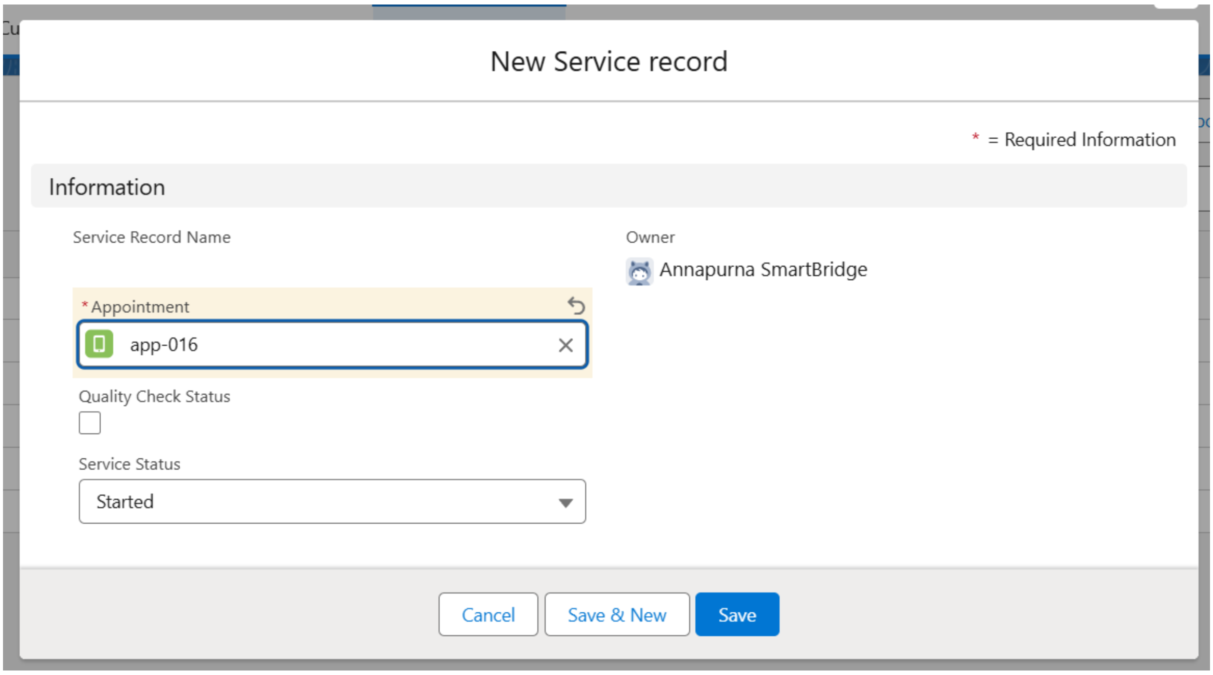
Now, Create the Appointment Record

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.

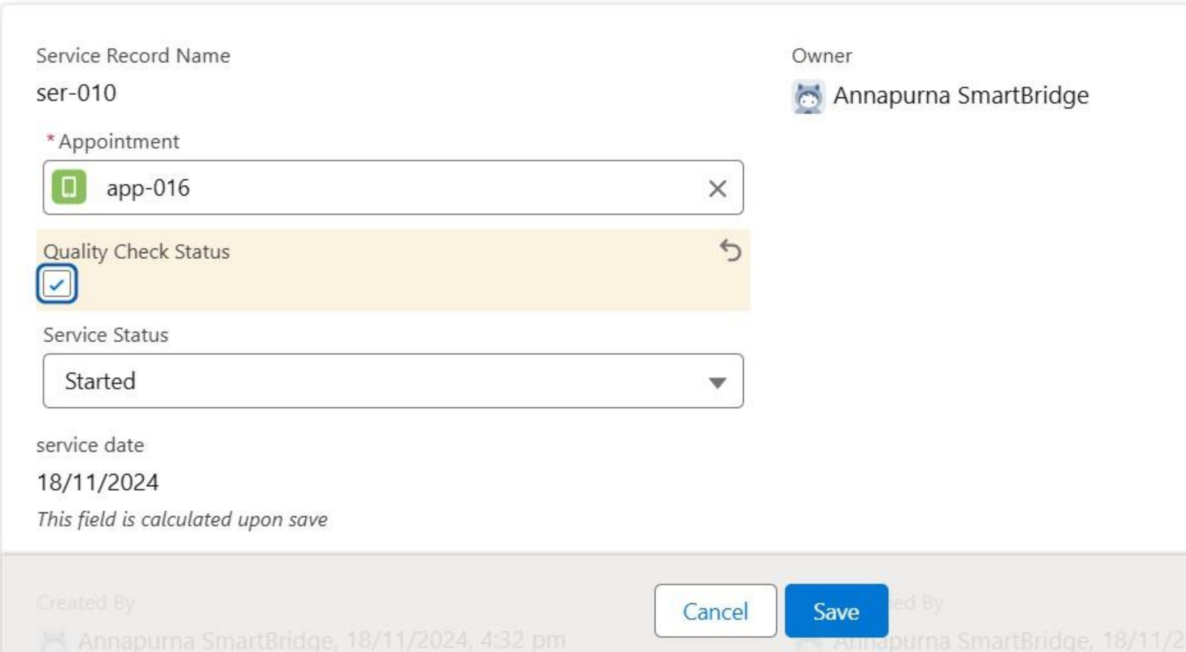


Now, Create a service Record

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



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



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