

Garage Management System

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Abstract

This project aims to design and implement a comprehensive garage management system leveraging Salesforce's robust platform. The system will streamline operations, enhance customer engagement, and boost productivity for garage owners and managers. Key features include:

Vehicle management: tracking maintenance, repairs, and inspections

Customer relationship management: managing customer interactions, appointments, and feedback

Inventory management: monitoring parts, supplies, and equipment

Work order management: assigning, tracking, and completing tasks

Reporting and analytics: providing insights into business performance and customer behavior

By harnessing Salesforce's cloud-based technology, this system will enable garage owners to:

Improve customer satisfaction through personalized service and timely communication

Increase operational efficiency through automated workflows and real-time tracking

Drive business growth through data-driven decision-making and targeted marketing

This project will demonstrate how Salesforce can be successfully adapted to meet the unique needs of the garage management industry, providing a scalable and flexible solution for businesses of all sizes.

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Introduction

A Garage Management System (GMS) in Salesforce is a specialized application designed to streamline and optimize the operations of a garage or automotive service center by leveraging Salesforce's robust and customizable platform. This system integrates various functionalities essential for managing automotive service businesses, including customer relationship management (CRM), inventory management, service scheduling, invoicing, and analytics. Key features include a comprehensive customer database to manage customer information and service history, automated communication tools for service reminders and follow-ups, and an efficient service scheduling system that integrates with calendars to manage technician schedules and service bays. It also includes work order management, inventory tracking, and automated reordering to ensure parts availability, as well as supplier management. Billing and invoicing features allow for the creation of service estimates, detailed invoicing, and secure payment processing through integrated payment gateways. Performance dashboards and custom reporting tools help visualize key performance indicators and analyze various aspects of the business. Mobile access through a dedicated app enables technicians and managers to access schedules and update work orders on the go. The system supports extensive customization to meet specific business needs, scalability to accommodate growth, and integrates with other systems for seamless operation. Being cloud-based, it ensures data accessibility from anywhere, enhances security to protect sensitive information, and automates routine tasks to reduce manual effort and errors. Implementing a GMS in Salesforce involves analyzing requirements, customizing the platform, integrating with existing systems, training staff, deploying the system, and providing ongoing support and maintenance. This implementation can significantly enhance operational efficiency, improve customer satisfaction, and drive business growth for automotive service centers.

Objects

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

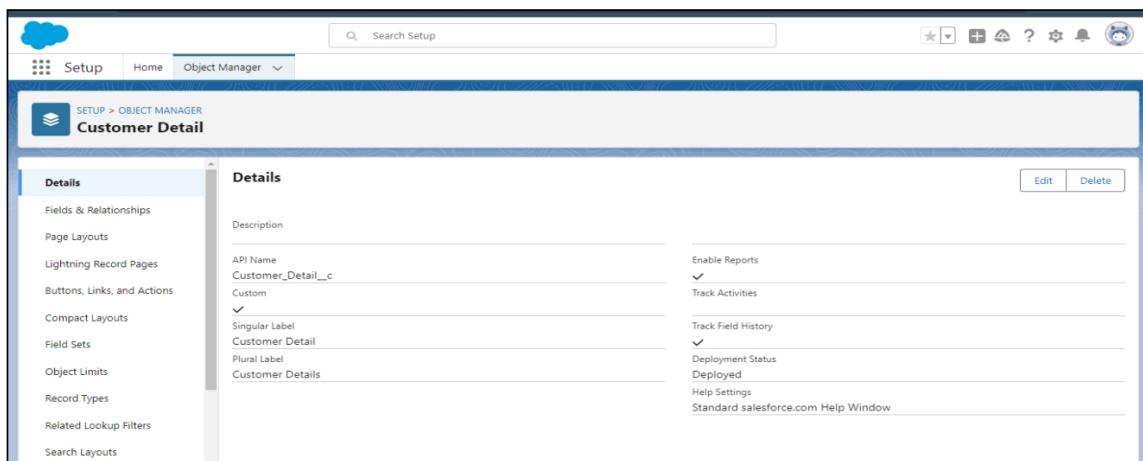
Salesforce objects are of two types:

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

Create Customer DetailsObject

To create an object:

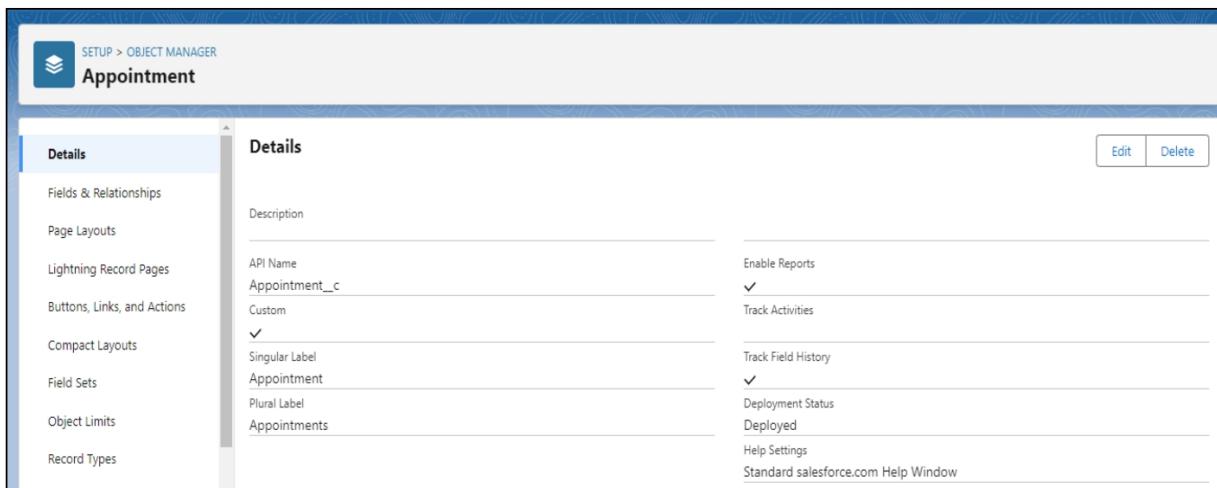
1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
1. Enter the label name >> Customer Details
2. Plural label name >> Customer Details
3. Enter Record Name Label and Format
 - Record Name >> Customer Name
 - Data Type >> Text
2. Click on Allow reports and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



Create Appointment 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 >> 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.



Create Service records 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 'Service records' object details in the Salesforce Object Manager. The left sidebar lists various configuration tabs: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main 'Details' tab is selected, displaying the following information:

Description	
API Name	Service_records__c
Custom	<input checked="" type="checkbox"/>
Singular Label	Service records
Plural Label	Service records
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	<input checked="" type="checkbox"/>
Track Field History	<input checked="" type="checkbox"/>
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

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.

Tabs

A tab is like a user interface that is used to build records for objects and to view the records in the objects.

To create a Tab:

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.
5. Repeat the step from 1 to 4 to make other tabs also .

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar and navigation links for 'User Interface' (selected), 'Rename Tabs and Labels', and 'Tabs'. A message at the bottom says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Custom Tabs' and contains a sub-section 'Custom Object Tabs'. It shows a table with four rows of tabs:

Action	Label	Tab Style	Description
Edit Del	Appointments	Books	
Edit Del	Billing details and feedback	Bank	
Edit Del	Customer Details	Car	
Edit Del	Service records	Hammer	

The Lightning App

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

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:

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

Lightning App Builder | App Settings | Pages | Garage Management Application

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 <input type="text" value="Garage Management Application"/> * Developer Name <input type="text" value="Garage_Management_Application"/> Description <input type="text" value="Enter a description..."/>	Image <input type="file"/> Primary Color Hex Value <input type="text" value="#0070D2"/> <input type="button" value="Upload"/>
Org Theme Options <input type="checkbox"/> Use the app's image and color instead of the org's custom theme	
App Launcher Preview	

Lightning App Builder | App Settings | Pages | Garage Management Application

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that doesn't support it.

Available Items	Selected Items
<input type="text" value="Type to filter list..."/> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Accounts <input checked="" type="checkbox"/> All Sites <input checked="" type="checkbox"/> Alternative Payment Methods <input checked="" type="checkbox"/> Analytics <input checked="" type="checkbox"/> App Launcher <input checked="" type="checkbox"/> Approval Requests <input checked="" type="checkbox"/> Asset Action Sources 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> Customer Details <input checked="" type="checkbox"/> Appointments <input checked="" type="checkbox"/> Billing details and feedback <input checked="" type="checkbox"/> Service records <input checked="" type="checkbox"/> Dashboards <input checked="" type="checkbox"/> Reports

User Profiles

Choose the user profiles that can access this app.

Available Profiles	Selected Profiles
<input type="text" value="Type to filter list..."/> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Analytics Cloud Integration User <input checked="" type="checkbox"/> Analytics Cloud Security User <input checked="" type="checkbox"/> Authenticated Website <input checked="" type="checkbox"/> Authenticated Website <input checked="" type="checkbox"/> B2B Reordering Portal Buyer Profile <input checked="" type="checkbox"/> Contract Manager 	<ul style="list-style-type: none"> <input checked="" type="checkbox"/> System Administrator <input checked="" type="checkbox"/> Manager <input checked="" type="checkbox"/> sales person

Fields

To create another fields in an object:

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

The screenshot shows the Salesforce Object Manager for the 'Customer Detail' object. On the left, there's a sidebar with various tabs like Details, Fields & Relationships, Page Layouts, etc. The 'Fields & Relationships' tab is selected. The main area displays a table titled 'Fields & Relationships' with 6 items. The columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data includes:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer Name	Name	Text(80)		✓
Gmail	Gmail_c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone no	Phone_no_c	Phone		

The screenshot shows the Salesforce Object Manager for the 'Appointment' object. The sidebar and table structure are identical to the Customer Detail example. The 'Fields & Relationships' table has 11 items. The data includes:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment Date	Appointment_Date_c	Date		
Appointment Name	Name	Auto Number		
Created By	CreatedById	Lookup(User)		
Customer Name	customer_Name_c	Lookup(Customer Detail)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Maintenance service	Maintenance_service_c	Checkbox		
Owner	OwnerId	Lookup(User,Group)		✓
Repairs	Repairs_c	Checkbox		
Replacement Parts	Replacement_Parts_c	Checkbox		

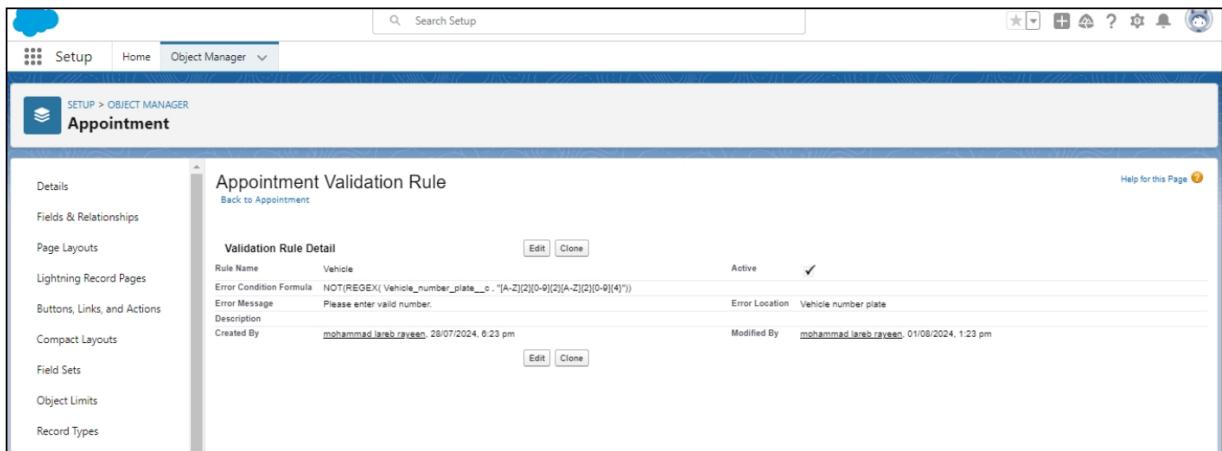
Fields & Relationships					
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Appointment	Appointment__c	Lookup(Appointment)		✓
Lightning Record Pages	Created By	CreatedById	Lookup(User)		
Buttons, Links, and Actions	Last Modified By	LastModifiedById	Lookup(User)		
Compact Layouts	Owner	OwnerId	Lookup(User,Group)		✓
Field Sets	Quality Check Status	Quality_Check_Status__c	Checkbox		
Object Limits	service date	service_date__c	Formula (Date)		
Record Types	Service records Name	Name	Auto Number		✓
Related Lookup Filters	Service Status	Service_Status__c	Picklist		
Search Layouts					
List View Button Layout					
Restriction Rules					

Fields & Relationships					
	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Billing details and feedback Name	Name	Auto Number		✓
Lightning Record Pages	Created By	CreatedById	Lookup(User)		
Buttons, Links, and Actions	Last Modified By	LastModifiedById	Lookup(User)		
Compact Layouts	Owner	OwnerId	Lookup(User,Group)		✓
Field Sets	Payment Paid	Payment_Paid__c	Currency(18, 0)		
Object Limits	Payment Status	Payment_Status__c	Picklist		
Record Types	Rating for service	Rating_for_service__c	Text(1)		
Related Lookup Filters	Service records	Service_records__c	Lookup(Service records)		✓
Search Layouts					
List View Button Layout					
Restriction Rules					

Validation Rule

To create a validation rule

1. Go to the setup page >> click on object manager >> From drop down click edit for Appointment object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as “ Vehicle ”.
4. Insert the Error Condition Formula as :-
`NOT(REGEX(Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))`
5. Enter the Error Message as “Please enter valid number”, select the Error location as Field and select the field as “Vehicle number plate”, and click Save.



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.

The screenshot shows the 'Service records' object in the Object Manager. A validation rule named 'service_status_note' is selected. The rule is active and has the following details:

Validation Rule Detail
Rule Name: service_status_note
Error Condition Formula: NOT(ISPICKVAL(Service_Status__c , "Completed"))
Error Message: still it is pending
Description:
Created By: mohammad.lareb.rayeen 28/07/2024, 8:24 pm
Modified By: mohammad.lareb.rayeen 05/08/2024, 2:48 pm

An Billing details and feedback Object

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

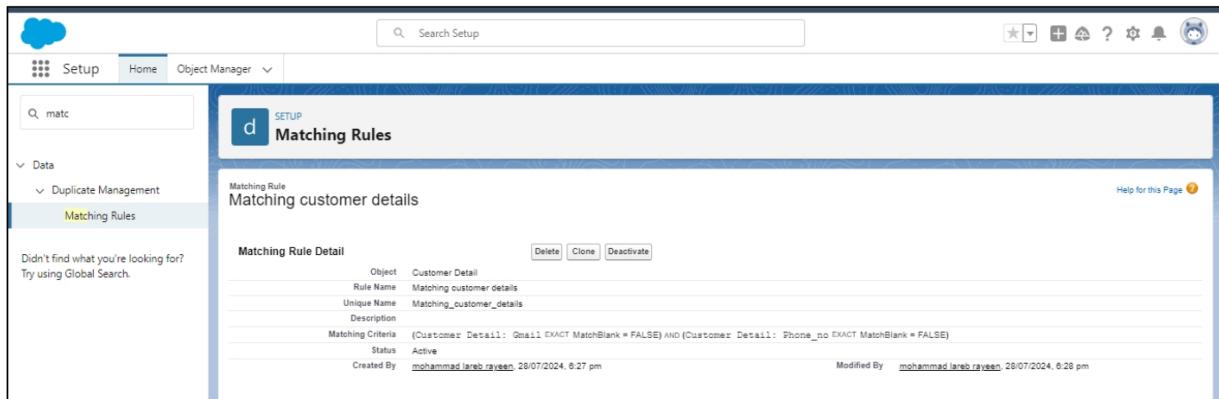
The screenshot shows the 'Billing details and feedback' object in the Object Manager. A validation rule named 'rating_should_be_less_than_5' is selected. The rule is active and has the following details:

Validation Rule Detail
Rule Name: rating_should_be_less_than_5
Error Condition Formula: NOT(REGEX(Rating_for_service__c , "[1-5]{1}"))
Error Message: rating should be from 1 to 5
Description:
Created By: mohammad.lareb.rayeen 28/07/2024, 8:26 pm
Modified By: mohammad.lareb.rayeen 28/07/2024, 8:26 pm

Duplicates 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.
3. Select the object as Customer details and click Next.
4. Give the Rule name : Matching customer details
5. Unique name : is auto populated
6. Define the matching criteria as
7. Field Matching Method
1. Gmail Exact
2. Phone Number Exact
8. Click save.
9. After Saving Click on Activate.



Profiles

To create a new profile:

- Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (Manager) >> Save.
- While still on the profile page, then click Edit.
- Select the Custom App settings as default for the Garage management.
- 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.
- Changing the session times out after should be “ 8 hours of inactivity”.
- Change the password policies as mentioned :
- User passwords expire in should be “ never expires ”.
- Minimum password length should be “ 8 ”, and click save

The screenshot shows the Salesforce Setup Profiles page. The profile is named 'Manager'. It has a 'User License' of 'Salesforce' and is a 'Custom Profile'. The 'Description' field is empty. The 'Created By' field shows 'mohammad jareb rayyan' at '28/07/2024, 8:30 pm'. The 'Modified By' field shows 'mohammad jareb rayyan' at '05/08/2024, 3:53 pm'. The page also lists various permissions and record types.

The screenshot shows the 'Custom Object Permissions' section where permissions are granted for Appointments, Billing details and feedback, Brokers, and Customer Details. It also shows the 'Session Settings' section with a 'Session Times Out After' setting of '8 hours of inactivity' and the 'Session Security Level Required at Login' set to 'Standard'. The 'Password Policies' section includes fields for 'User passwords expire in' (set to 'Never expires'), 'Enforce password history' (set to '3 passwords remembered'), 'Minimum password length' (set to '8'), 'Password complexity requirement' (set to 'Must include alpha and numeric characters'), 'Password question requirement' (set to 'Cannot contain password'), 'Maximum invalid login attempts' (set to '10'), 'Lockout effective period' (set to '15 minutes'), 'Obscure secret answer for password resets' (unchecked), 'Require a minimum 1 day password lifetime' (unchecked), and 'Don't immediately expire links in forgot password emails' (unchecked).

sales person Profile

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

The screenshot shows the 'Profile Detail' section for the 'sales person' profile. It includes fields for Name (sales person), User License (Salesforce Platform), Description, Created By (mohammad lareb rayeen, 28/07/2024, 6:38 pm), and Modified By (mohammad lareb rayeen, 05/08/2024, 3:53 pm). Buttons for Edit, Clone, Delete, and View Users are available at the top right. A note at the bottom states: "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." A link to 'Help for this Page' is also present.

The screenshot shows the 'Profiles' page under 'SETUP'. The 'Custom Object Permissions' section displays access levels for various objects. The 'Basic Access' table shows permissions for Appointments, Billing details and feedback, Brokers, and Customer Details. The 'Data Administration' table shows permissions for Properties, Service records, and waypoints. Session Settings and Password Policies are also visible on the page.

Object	Basic Access					Data Administration						
	Read	Create	Edit	Delete	View All	Modify All	Read	Create	Edit	Delete	View All	Modify All
Appointments	✓	□	□	□	□	□	Properties	□	□	□	□	□
Billing details and feedback	✓	□	□	□	□	□	Service records	✓	✓	□	□	□
Brokers	□	□	□	□	□	□	waypoints	□	□	□	□	□
Customer Details	✓	□	□	□	□	□						

Role & Role Hierarchy

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

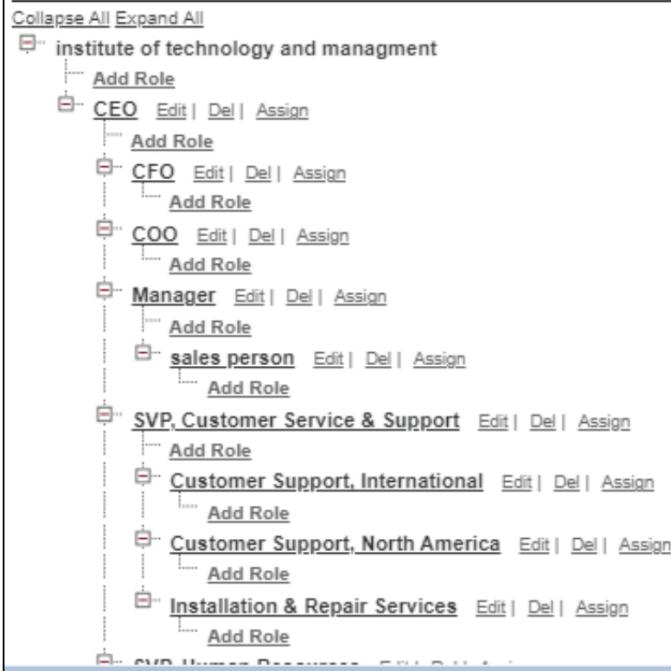
Creating Manager Role:

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.

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.

Your Organization's Role Hierarchy



Users

Create User

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

The screenshot shows the Salesforce User Detail page for a user named "Niklaus Mikaelson". The page includes a header with links for Permission Set Assignments, Permission Set Assignments Activation Required, Permission Set Group Assignments, Permission Set License Assignments, Personal Groups, Public Group Membership, Queue Membership, Team, Managers in the Role Hierarchy, OAuth Apps, Third-Party Account Links, Installed Mobile Apps, Authentication Settings for External Systems, Login History, and User Provisioning Accounts. The main section, "User Detail", contains a table with the following data:

User Detail		Edit		Sharing	Reset Password	Freeze	View Summary
Name	Niklaus Mikaelson	Role	Manager				
Alias	nmika	User License	Salesforce				
Email	mikaelson@gmail.com [Verify]	Profile	Manager				
Username	mikaelson@niklaus1.com	Active	✓				
Nickname	User17221723881165032064	Marketing User	<input type="checkbox"/>				
Title		Offline User	<input type="checkbox"/>				
Company		Knowledge User	<input type="checkbox"/>				
Department		Flow User	<input type="checkbox"/>				
Division		Service Cloud User	<input type="checkbox"/>				
Address	Samadhiya Colony Road Samadhiya Colony Kala Saiyad A 14/4 Gwalior 474001 Madhya Pradesh India	Site.com Contributor User	<input type="checkbox"/>				
Time Zone	(GMT+05:30) India Standard Time (Asia/Kolkata)	Site.com Publisher User	<input type="checkbox"/>				
Locale	English (India)	WDC User	<input type="checkbox"/>				
Language	English	Mobile Push Registrations	View				
Delegated Approver		Data.com User Type	[i]				

Creating another users

<input type="checkbox"/> Edit	lodhi_muskan	modin	muskan@lodhi.com	sales_person	✓	sales_person
<input type="checkbox"/> Edit	Mikaelson_Niklaus	nmika	mikaelson@niklaus1.com	Manager	✓	Manager
<input type="checkbox"/> Edit	raveen_ml	mrave	raveen@ml.com	sales_person	✓	sales_person

Public Group

Creating New Public Group

1. Go to setup >> type users in quick find box >> select public groups >> click New.
2. Give the Label as “sales team”.
3. Group name is autopopulated.
4. Search for Roles.
5. In Available Members select Sales person and click on add it will be moved to selected member.
6. Click on save.

SETUP **Public Groups**

Group
sales team

Help for this Page ⓘ

Label	sales team	Edit	Delete	View Summary
Group Name	sales_team			
Grant Access Using Hierarchies	✓			
Created By	mohammad.lareb.raveen, 28/07/2024, 6:57 pm	Modified By	mohammad.lareb.raveen, 28/07/2024, 6:57 pm	

[View All Users](#)

Name	Type
sales_person	Role

Role
sales person

Help for this Page ⓘ

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: institute of technology and managment > CEO > Manager > sales person

[Users in sales_person Role ⓘ](#)

Role Detail

Label	sales person	Edit	Delete	Role Name	sales_person
This role reports to	Manager			Role Name as displayed on reports	
Modified By	mohammad.lareb.raveen, 28/07/2024, 6:42 pm			Sharing Groups	Role, Role and Subordinates
Opportunity Access	Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities				
Case Access	Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases				

Users in sales person Role

Action	Full Name	Alias	Username	Active
Edit	ml raveen	mrave	raveen@ml.com	✓
Edit	muskan lodhi	mlodh	muskan@lodhi.com	✓

Sharing Settings

Creating Sharing settings

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

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. The top navigation bar includes a shield icon, 'SETUP', and the page title 'Sharing Settings'. Below the header, there are two columns of dropdown menus for changing sharing settings. The first column lists objects: Streaming Channel, Tableau Host Mapping, Thanks, Web Cart Document, Work Order, Work Plan, Work Plan Template, Work Step Template, Appointment, Billing details and feedback, Broker, Customer Detail, Property, Service records, and waypoint. The second column contains dropdown menus with options like 'Private', 'Public Read/Write', and 'Public Read Only'. To the right of each dropdown is a checkbox column with checked boxes for most items. At the bottom left, there is a link to 'Other Settings'.

Object	Sharing Rule 1	Sharing Rule 2	Sharing Rule 3
Streaming Channel	Public Read/Write	Private	<input checked="" type="checkbox"/>
Tableau Host Mapping	Public Read Only	Private	<input checked="" type="checkbox"/>
Thanks	Public Read Only	Private	<input checked="" type="checkbox"/>
Web Cart Document	Private	Private	<input checked="" type="checkbox"/>
Work Order	Private	Private	<input checked="" type="checkbox"/>
Work Plan	Private	Private	<input checked="" type="checkbox"/>
Work Plan Template	Private	Private	<input checked="" type="checkbox"/>
Work Step Template	Private	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"/>
Broker	Public Read/Write	Private	<input checked="" type="checkbox"/>
Customer Detail	Public Read/Write	Private	<input checked="" type="checkbox"/>
Property	Public Read/Write	Private	<input checked="" type="checkbox"/>
Service records	Private	Private	<input checked="" type="checkbox"/>
waypoint	Public Read/Write	Private	<input checked="" type="checkbox"/>

Flows

Create a Flow

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

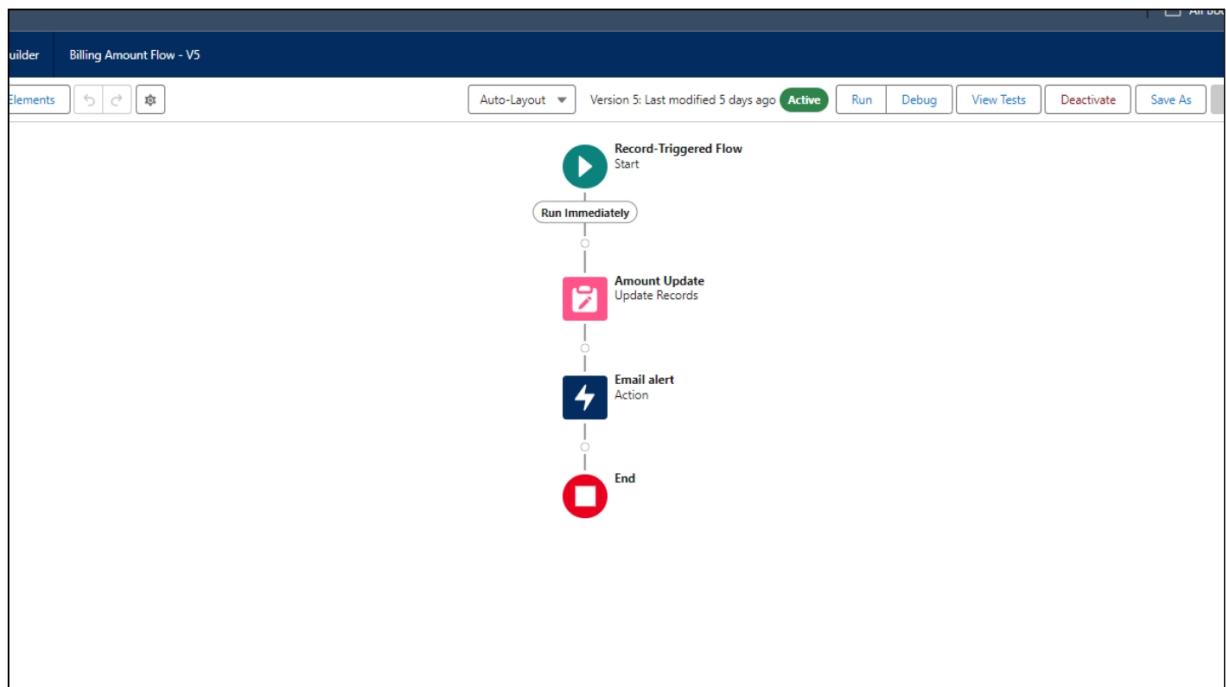
Dear {!\$Record.Service_records__r.Appointment__r.Customer_Name__r.Name},

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

Amount paid : {!\$Record.Payment_Paid__c}

Thank you for Coming .

23. Click done.
24. Now Click on Add Element , select Action.
25. Their action bar will be opened in that search for “ send email ” and click on it.
26. Give the label name as “ Email Alert”
27. API name will be auto populated.
28. Enable the body in set input values for the selected action.
29. Select the text template that created , Body : {!alert}
30. Include recipient address list select the email form the record.
31. RecipientAddressList:
{\$Record.Service_records__r.Appointment__r.Customer_Name__r.Gmail__c}
32. Include subject as “ Thank You for Your Payment - Garage Management”.
33. Click done.
34. Click on save. Give the Flow label , Flow Api name will be autopopulated.
35. And click save, and click on activate.

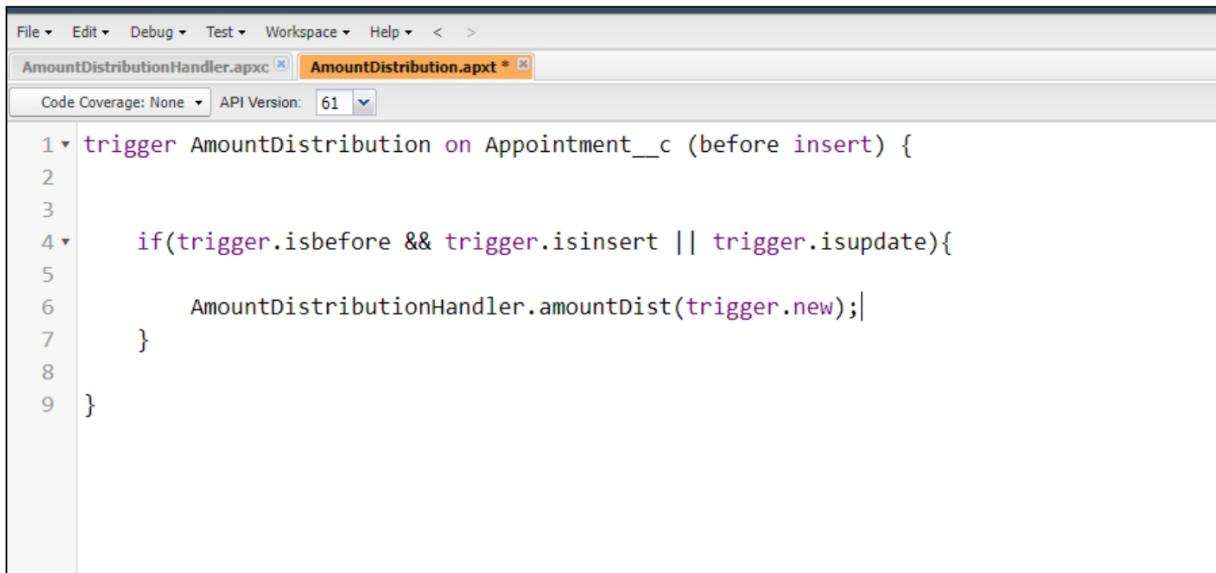


Apex Trigger

Trigger Handler :

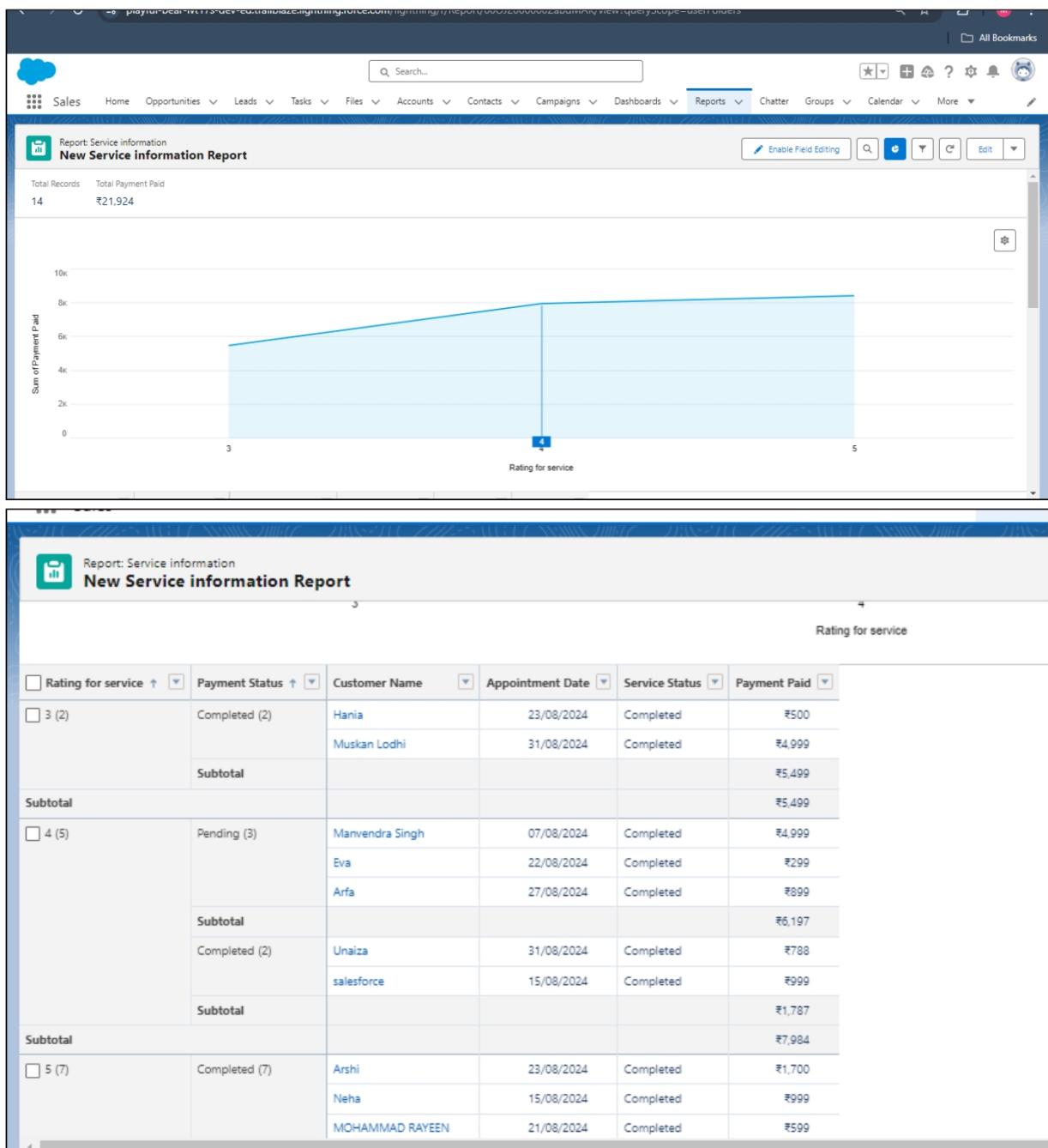
How to create a new trigger :

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



```
File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >
AmountDistributionHandler.apxc [x] AmountDistribution.apxt * [x]
Code Coverage: None API Version: 61
1 trigger AmountDistribution on Appointment__c (before insert) {
2
3
4 if(trigger.isbefore && trigger.isinsert || trigger.isupdate){
5
6     AmountDistributionHandler.amountDist(trigger.new);
7
8 }
9 }
```

Reports



Dashboard

1. Go to the app >> click on the Dashboards tabs.
2. Give a Name and select the folder that created, and click on create.
3. Select add component.
4. Select a Report and click on select.
5. Select the Line Chart. Change the theme.
6. Click Add then click on Save and then click on Done.
7. Preview is shown below.
8. After that Click on Subscribe on top right.
9. Set the Frequency as “ weekly ”.
10. Set a day as monday.
11. And Click on save.

