

Garage Management System

User Story:

The **Garage Management System (GMS)** is designed to help garage owners and staff efficiently manage daily operations, including customer records, vehicle details, service tracking, and billing. It allows receptionists to register customers and their vehicles, while service advisors can assign repair jobs to mechanics and monitor their progress in real time. The system also manages spare parts inventory, automatically updating stock levels when parts are used and sending alerts for low stock. Once a service is completed, invoices are generated instantly with accurate details for labor and parts. Managers can view detailed reports on revenue, service trends, and mechanic performance to make better business decisions. Role-based access ensures data security and prevents unauthorized access. Overall, the GMS simplifies workflow, reduces paperwork, and enhances customer satisfaction by streamlining all garage operations in one centralized platform.

Project Overview :

The **Garage Management System** is a digital solution designed to streamline and automate garage operations. It helps manage customer details, vehicle records, repair jobs, and billing efficiently. The system allows staff to assign tasks, monitor job progress, and maintain parts inventory. It also generates invoices and reports for better financial and performance tracking. Overall, it improves service quality, reduces manual work, and enhances customer satisfaction.

Project Flow:

- Milestone 1 :Salesforce
- Milestone 2 : Object
- Milestone 3 : Tabs
- Milestone 4 : The Lightning App
- Milestone 5 : Fields
- Milestone 6 : Validation rule
- Milestone 7 : Duplicate rule
- Milestone 8 : Profiles
- Milestone 9 : Role& Role Hierarchy
- Milestone 10 :Users
- Milestone 11 : Public Groups
- Milestone 12 : Sharing Setting
- Milestone 13 : Flows
- Milestone 14 : Apex Triggers
- Milestone 15 : Reports
- Milestone 16 : Dashboards

Milestone 17 :User Adoption

What you'll learn

- System Design & Architecture
- Database Management
- CRUD Operations
- User Interface Design
- Role-Based Access Control
- Inventory & Billing Automation
- Report Generation
- Problem-Solving Skills
- Project Deployment

Milestone 1-Salesforce Account

Introduction:

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

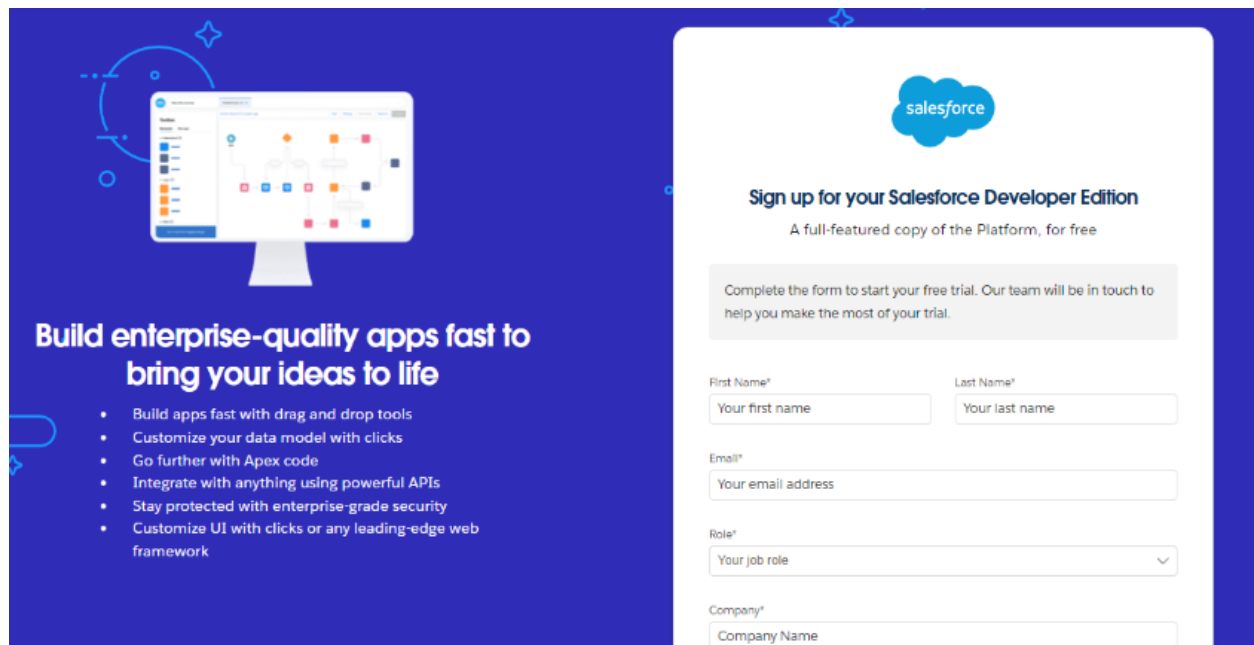
What Is Salesforce

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers. Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud. So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this: <https://youtu.be/r9EX3IGde5k>

Activity 1: Creating Developer Account

Creating a developer org in salesforce.

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



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

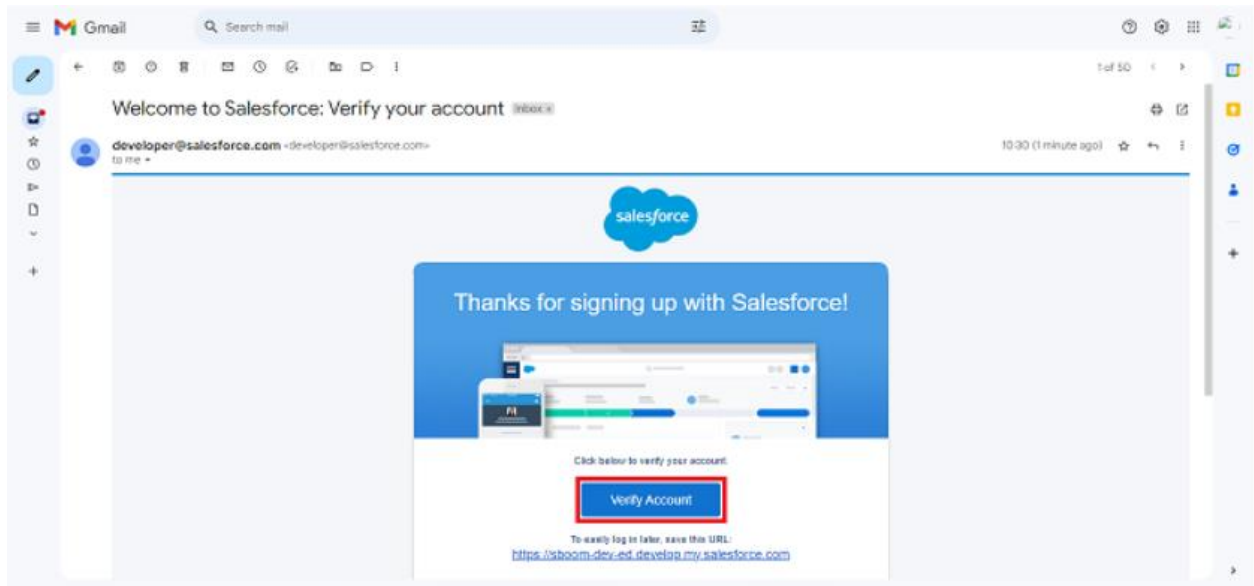
Username : should be a combination of your name and company

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.

Activity 2: Account Activation

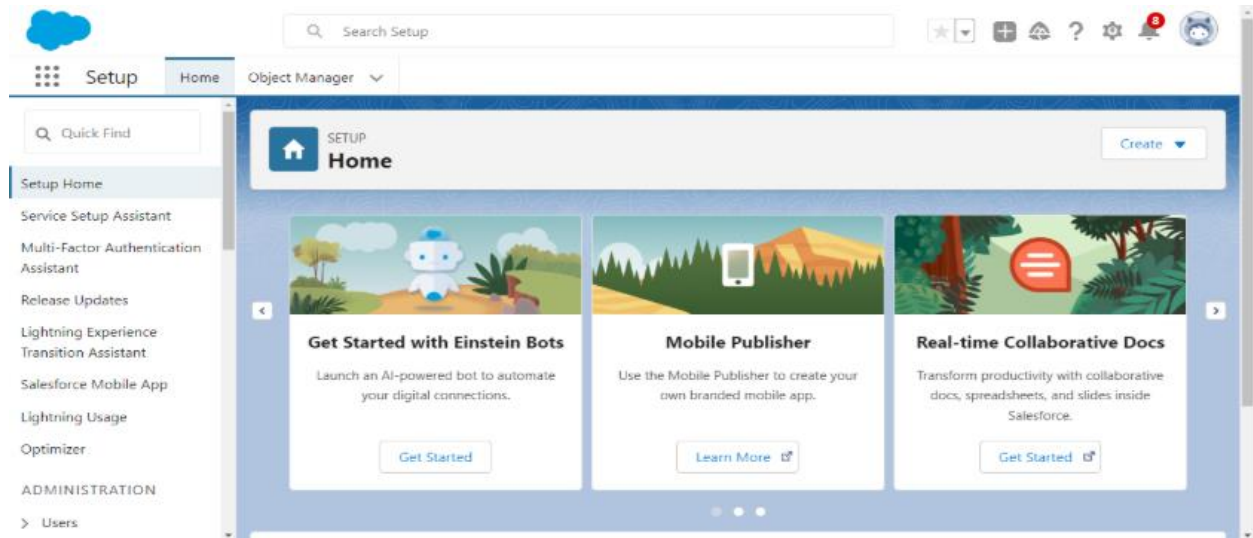
1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



2. Click on Verify Account
3. Give a password and answer a security question and click on change password.

A screenshot of the 'Change Your Password' page. The page title is 'Change Your Password'. Below it, it says 'Enter a new password for lead@sb.com. Make sure to include at least:'. There are three green checkmarks with requirements: '8 characters', '1 letter', and '1 number'. Below these are two password fields. The first is labeled '* New Password' and has a 'Good' feedback message. The second is labeled '* Confirm New Password' and has a 'Match' feedback message. Below these is a 'Security Question' dropdown menu with the option 'In what city were you born?'. Below that is an 'Answer' field with the text 'asdfghjkl'. At the bottom is a blue 'Change Password' button, which is highlighted with a red rectangle.

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



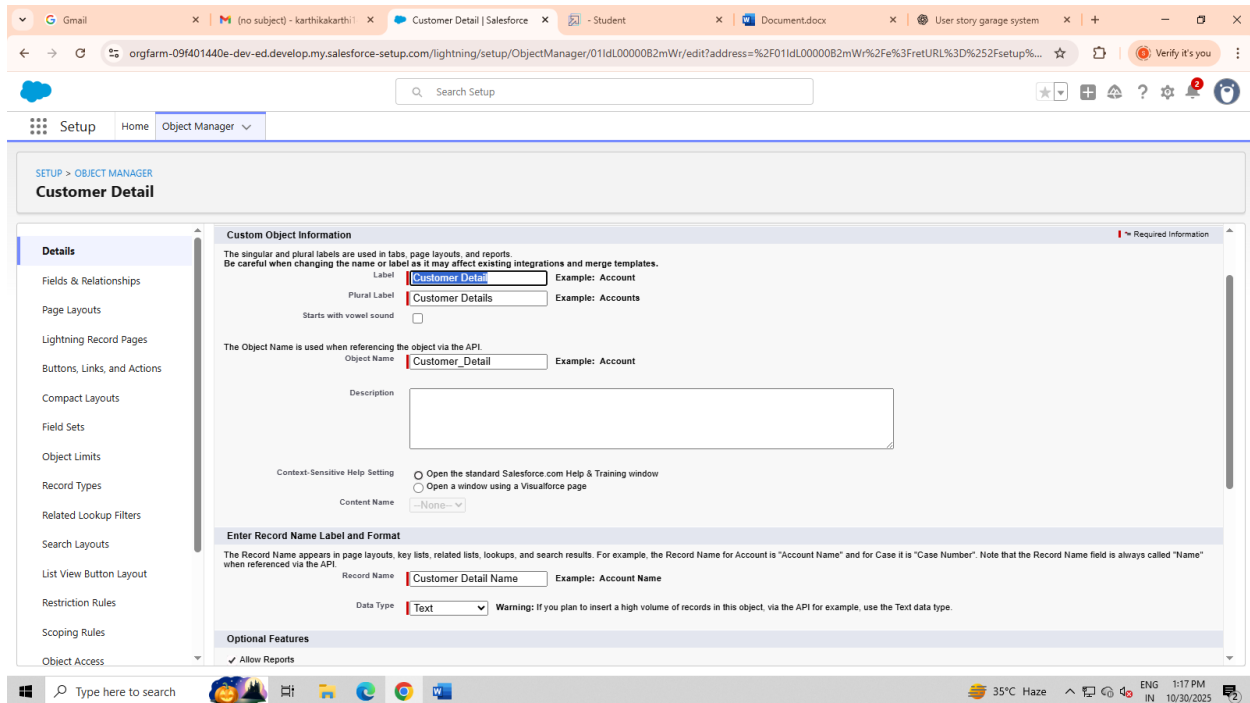
Milestone 2- Objects

In Salesforce, objects are database tables that allow you to store data specific to your organization.

Activity 1: Create Customer Details 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.



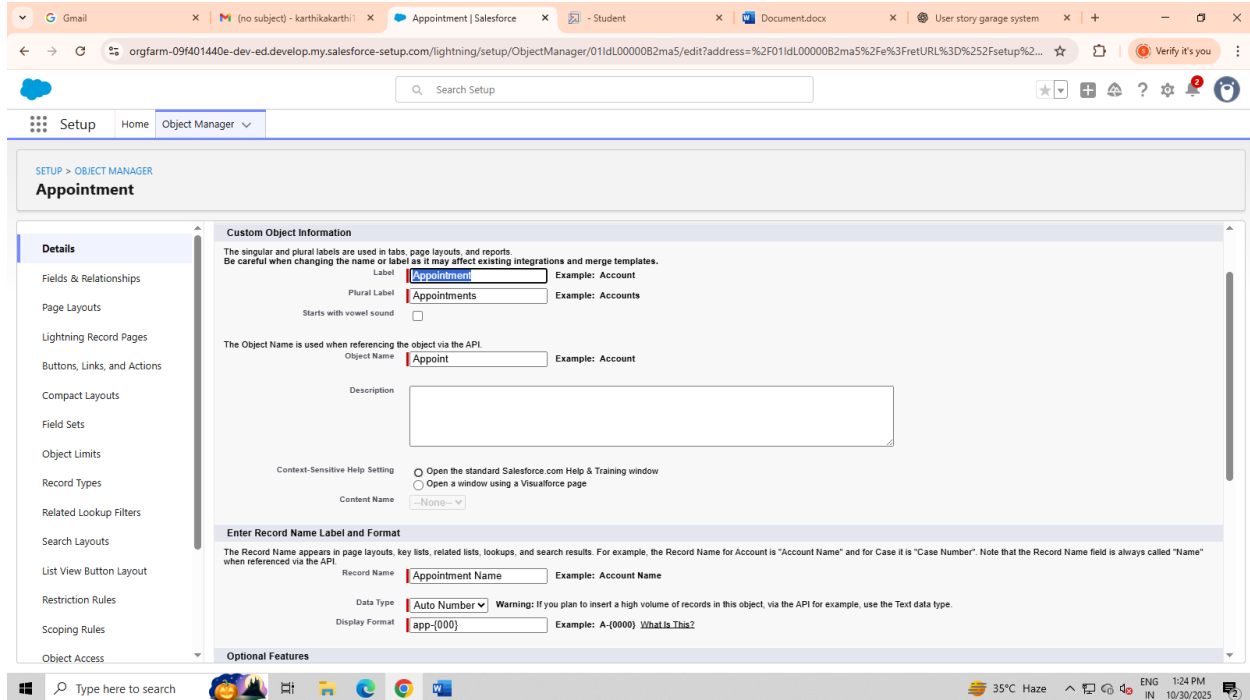
Activity 2: Create Appointment Object

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

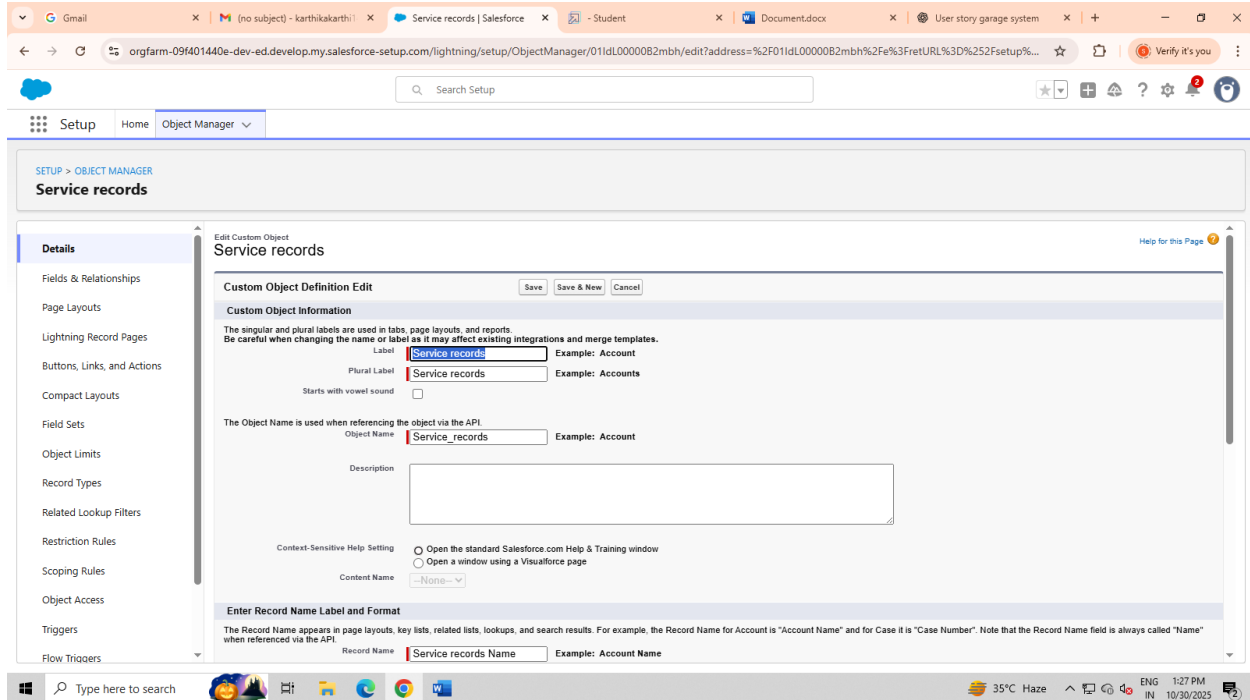
2. Click on Allow reports and Track Field History,
3. Allow search >> Save.



Activity 3: 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.



Activity 4: 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.

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

Help for this Page

Step 1. Enter the DetailsStep 1 of 3

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

(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

NextCancel

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

SaveCancel

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

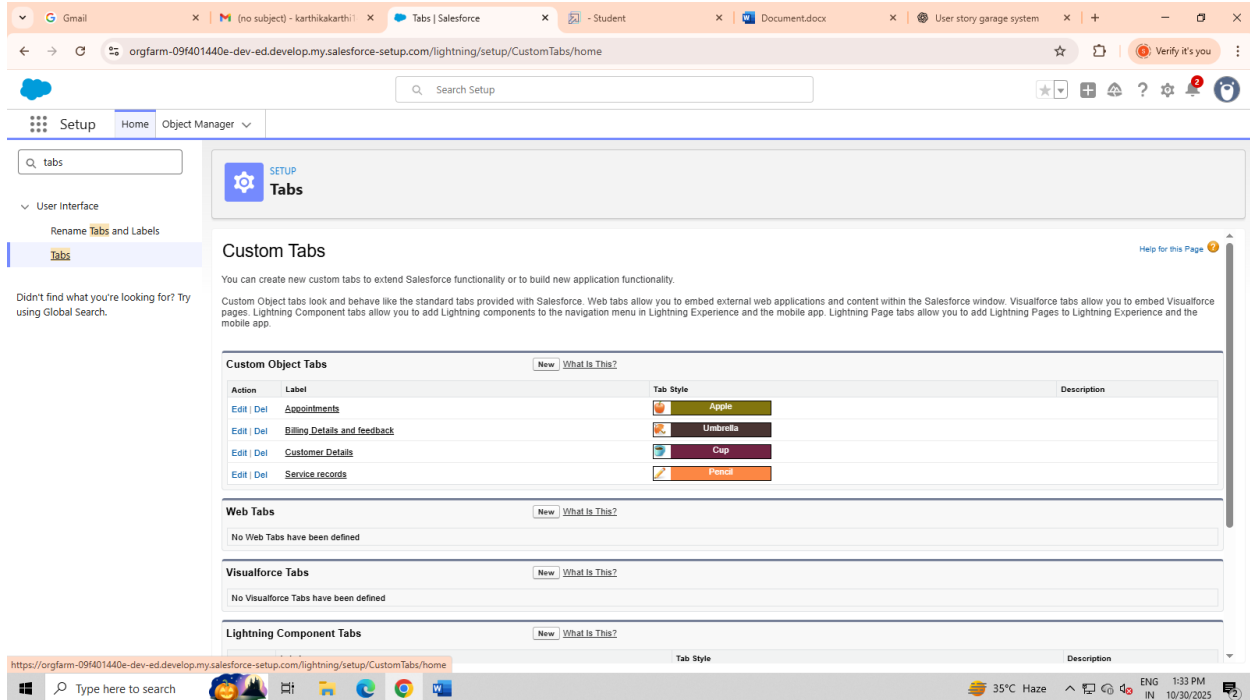
Save

Cancel



Activity 2: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



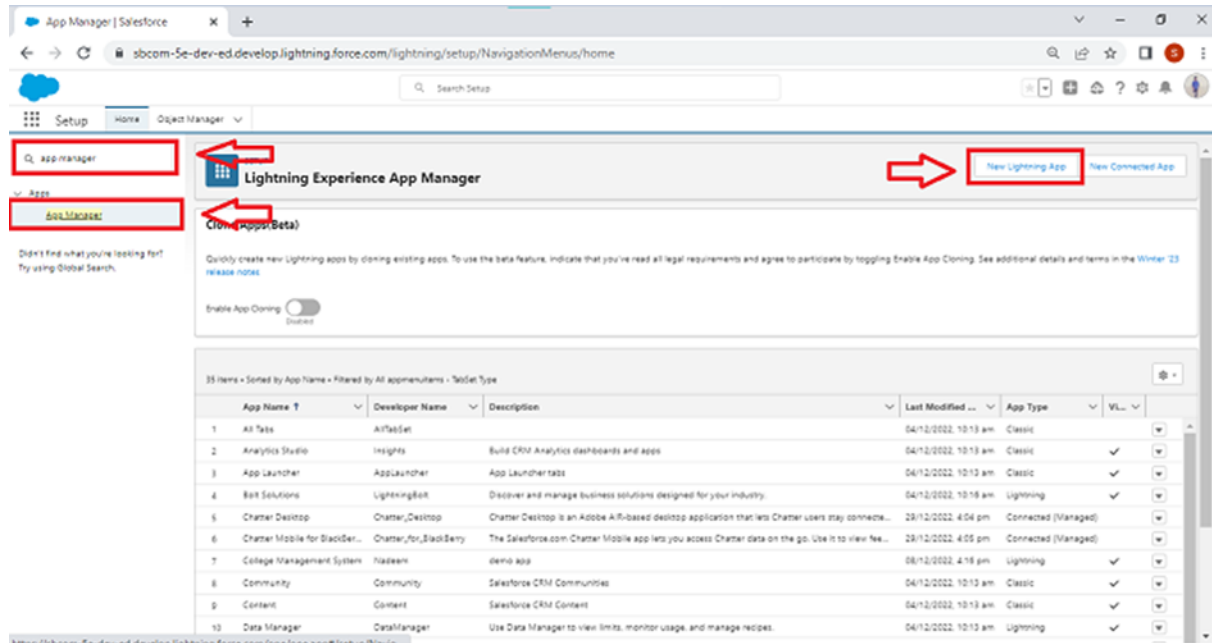
Milestone 4- The Lightning App

A Lightning App in Salesforce is a collection of items that work together to serve a particular function for the end-users. These items can include standard and custom objects, tabs, utilities, and other productivity tools. Lightning Apps are designed to provide a more intuitive and efficient user experience compared to traditional Salesforce apps.

Activity 1: Creating 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.

App Details & Branding

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

App Details

* App Name ⓘ
Name your app...

* Developer Name ⓘ
Enter a developer name...

Description ⓘ
Enter a description...

App Branding

Image ⓘ
Upload

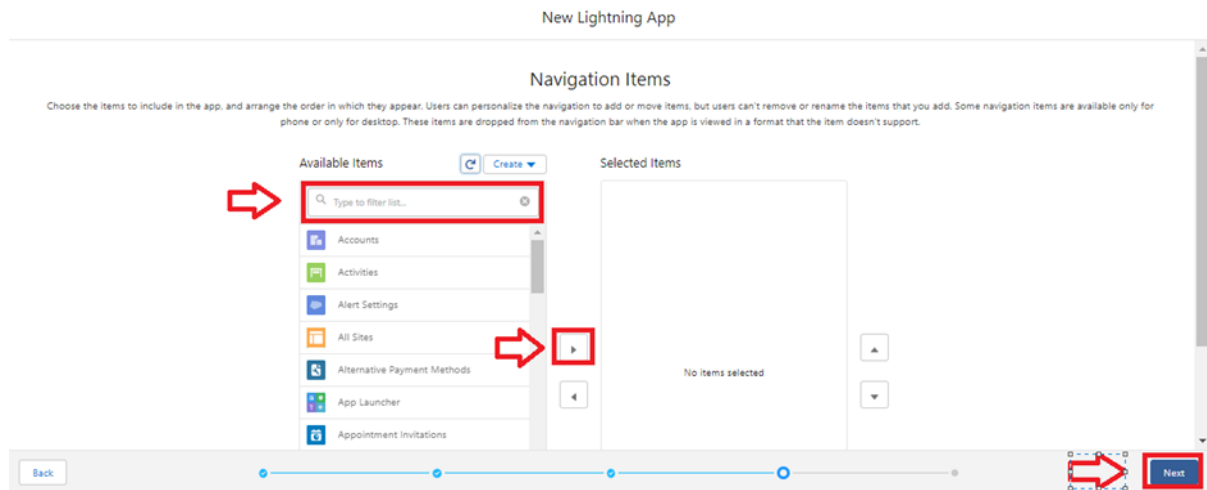
Primary Color Hex Value
#0070D2

Org Theme Options
☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

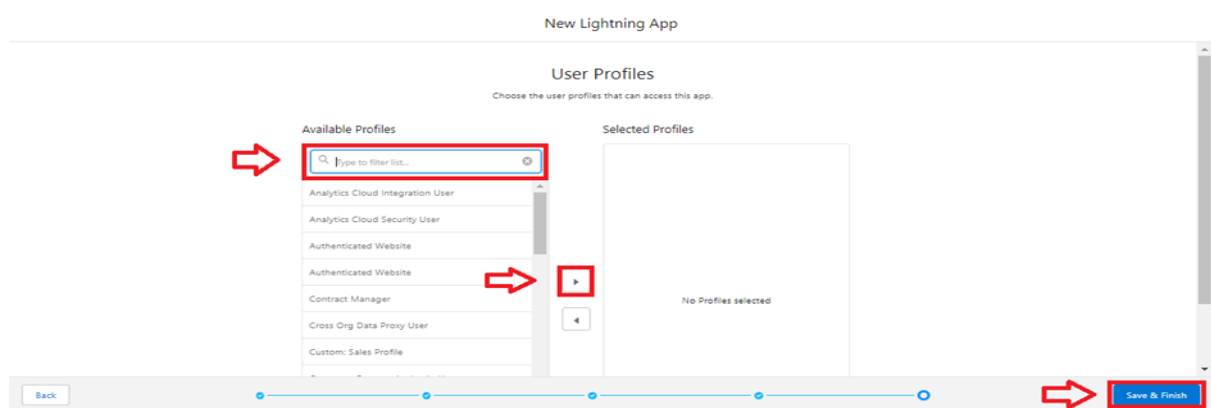
Next

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.

Milestone 5-Fields

We talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

Types of Fields

1. Standard Fields
2. Custom Fields

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

- Created By
- Owner
- Last Modified
- Field Made During object Creation

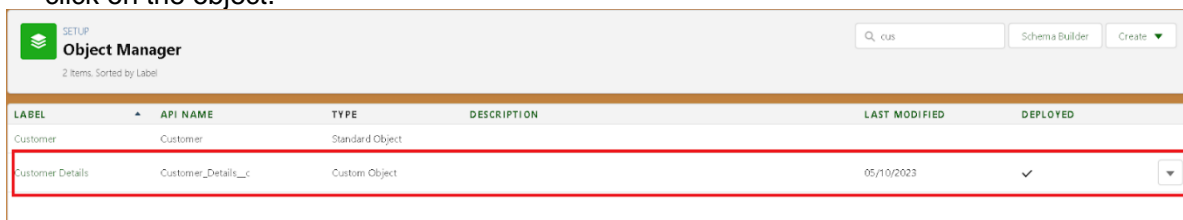
Custom Fields:

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organiser or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

Activity 1: Creation Of Fields For The Customer Details Object

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.



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

Setup Home Object Manager

Customer1

Details

Fields & Relationships 8 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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		

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

3. Select Data Type as a "Phone"

Setup Home Object Manager

Customer1

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

☐ Currency
☐ Date
☐ Date/Time
☐ Email
☐ Geolocation
☐ Number
☐ Percent
☒ Phone
☐ Picklist
☐ Picklist (Multi-Select)
☐ Text
☐ Text Area
☐ Text Area (Long)
☐ Text Area (Rich)
☐ Text (Encrypted)
☐ Time
☐ URL

Allows users to enter a dollar or other currency amount and automatically formats the value as a currency amount. This can be used if you export data to Excel or another spreadsheet.
 Allows users to enter a date or pick a date from a popup calendar.
 Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
 Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
 Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
 Allows users to enter any number. Leading zeros are removed.
 Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.
 Allows users to enter any phone number. Automatically formats it as a phone number.
 Allows users to select a value from a list you define.
 Allows users to select multiple values from a list you define.
 Allows users to enter any combination of letters and numbers.
 Allows users to enter up to 255 characters on separate lines.
 Allows users to enter up to 131,072 characters on separate lines.
 Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.
 Allows users to enter any combination of letters and numbers and store them in encrypted form.
 Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50.000" are all valid times for this field.
 Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

4. Click on next.

Setup Home Object Manager

Customer1

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
Triggers
Flow Triggers
Validation Rules

Phone no

Custom Field Definition Edit

Field Information

Field Label Phone no

Field Name Phone_no

Data Type Phone

Help Text

Data Owner User

Field Usage -None-

Data Sensitivity Level -None-

Compliance Categorization

Available: PII, HIPAA, GDPR, PCI

Chosen:

General Options

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

Default Value: [Show Formula Editor](#)

Use formula syntax. Enclose text and picklist value API names in double quotes. "foo__c" includes numbers without quotes. Use percentages as decimals (0.15), and express time calculations in the standard format. Today() is 1. To reference a field from a Custom Metadata type record use \$CustomMetadata.Type__c and RecordIdPhoneField__c

Change Field Type Save Cancel

5. Fill the Above as following:

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

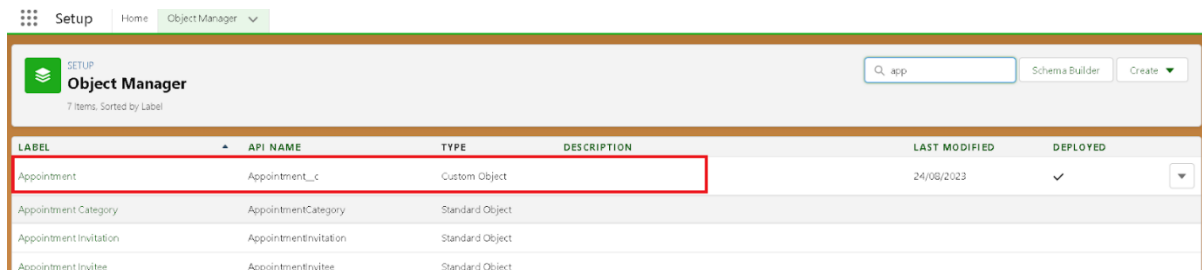
Note: Follow the above steps for the remaining field for the same object.

2. To create another fields in an object:

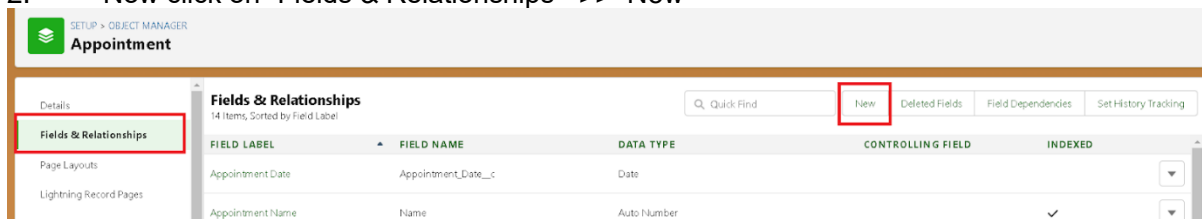
1. Go to setup >> click on Object Manager >> type object name(Customer Details) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Email” and Click on Next
4. Fill the Above as following:
 - Field Label : Gmail
 - Field Name : gets auto generated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

Activity 2:Creation Of Lookup Fields


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



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



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

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

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 [1](#) 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

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

What to do if the lookup record is deleted?

☐ 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.

Lookup Filter

Optionally, 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	Appointment: Created Date
Begin typing to search for a field...	--None--	(Value) []

AND

Filter Type: ☒ **Required.** The user-entered value must match filter criteria.


If it doesn't, display this error message on save:

Value does not exist or does not match filter criteria. 

[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](#)

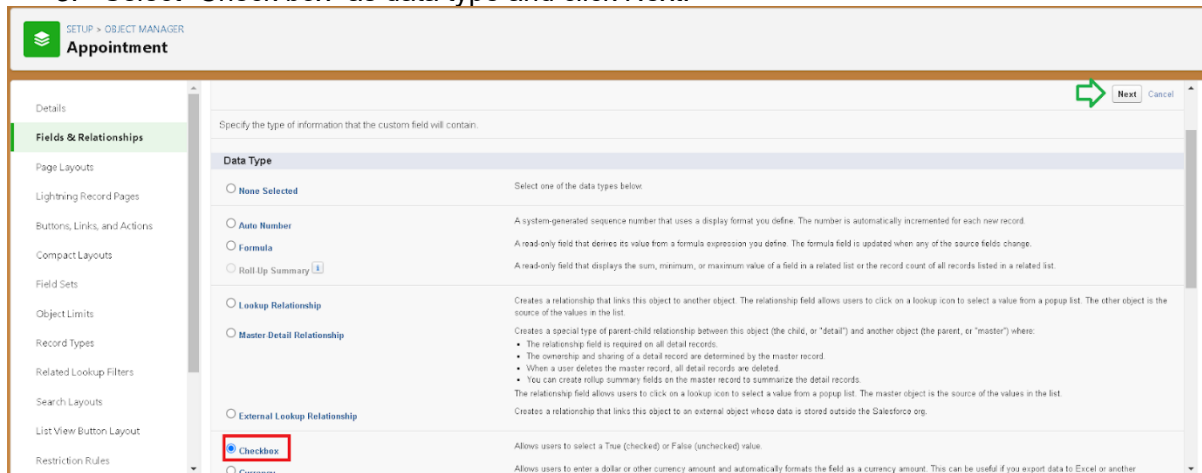
10. Error Message : Value does not match the criteria.
11. Enable the filter by click on Active.
12. Next >> Next >> Save.

Creation of Lookup Field on Billing details and feedback Object :

1. Go to setup >> click on 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.

Activity 3:Creation Of CheckBox Fields

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.



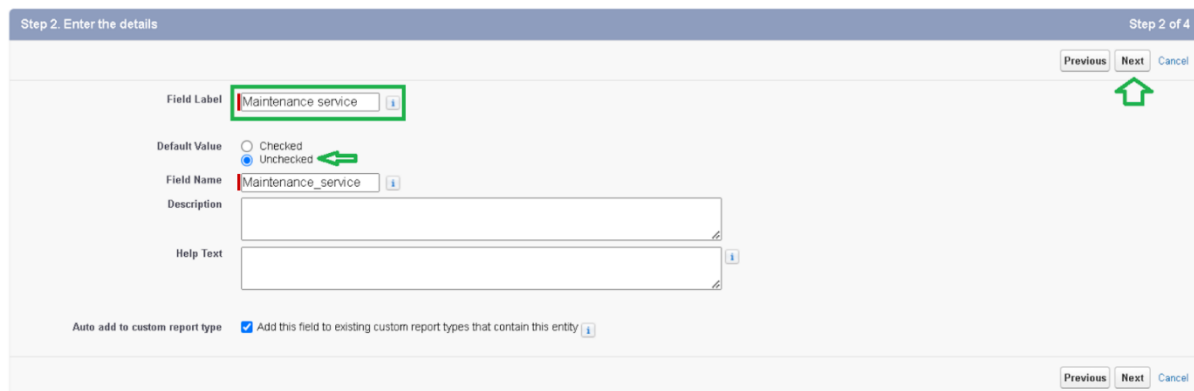
4. Give the Field Label : Maintenance service

5. Field Name : is auto populated

6. Default value : unchecked

Appointment
New Custom Field

[Help for this Page](#)



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

Activity 4:Creation Of Date Fields

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

Field Label: Service Amount

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: 18
Number of digits to the left of the decimal point

Decimal Places: 0
Number of digits to the right of the decimal point

Field Name: Service_Amount

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

6. Click on next
7. Give read only for all the profiles in field level security for profile.

Appointment
New Custom Field

Step 3. Establish field-level security

Field Label: Service Amounts
Data Type: Currency
Field Name: Service_Amounts
Description:

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.

Field Level Security for Profile	Visible	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"/>

8. Click on next >> save.

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 Name : is auto populated

Activity 5:Creation Of Currency Fields

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

Field Label: Service Amount

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: 18
Number of digits to the left of the decimal point

Decimal Places: 0
Number of digits to the right of the decimal point

Field Name: Service_Amount

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

6. Click on next
7. Give read only for all the profiles in field level security for profile.

Appointment
New Custom Field

Step 3. Establish field-level security

Field Label: Service Amounts
Data Type: Currency
Field Name: Service_Amounts
Description:

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.

Field-Level Security for Profile	Visible	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"/>

8. Click on next >> save.

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 Name : is auto populated

Activity 6:Creation Of Text Fields

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

Please enter the maximum length for a text field below.

Length

Field Name

Description

Help Text

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

Unique ☒ Do not allow duplicate values

☒ Treat *ABC* and *abc* as duplicate values (case insensitive)

☐ Treat *ABC* and *abc* as different values (case sensitive)

External ID ☐ Set this field as the unique record identifier from an external system

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

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

Creation of Text Fields in Billing details and feedback object :

1. Go to setup >> click on Object Manager >> type object name(Billing 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.
8. Click on next >> next >> save

Activity 7: Creation Of Picklist Fields

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

Field Label

Values ☐ Use global picklist value set
☒ Enter values, with each value separated by a new line

☐ 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

Description

Previous Next Cancel

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

Creation of Picklist Fields in Billing details and feedback object :

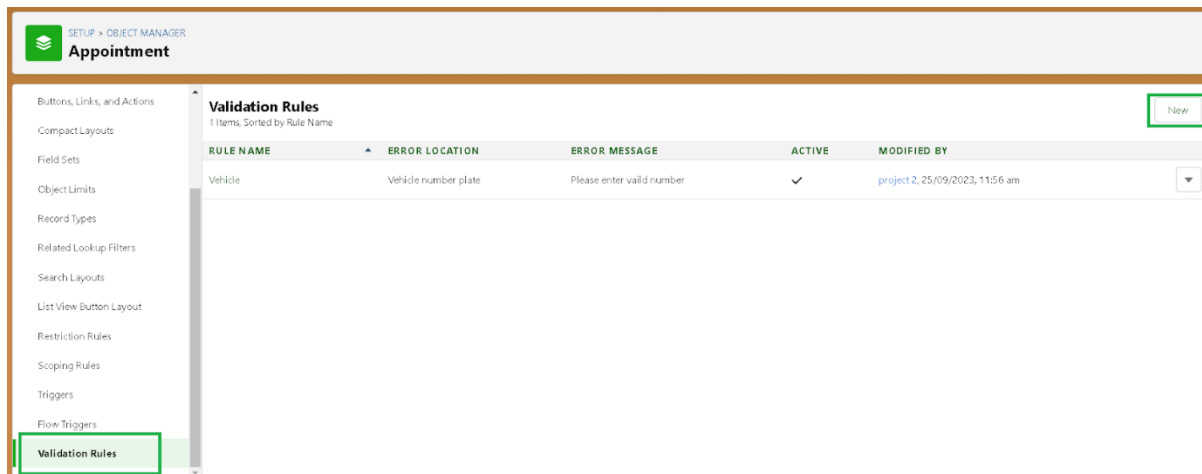
1. Go to setup >> click on Object Manager >> type object name(Billing details and feedback) in search bar >> click on the object.
2. Click on fields & relationship >> click on New.
3. Select Data type as "Picklist" and click Next.
4. Enter Field Label as "Payment Status", under values select "Enter values, 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.

Milestone 6-Validation Rule

Validation rules are applied when a user tries to save a record and are used to check if the data meets specified criteria. If the criteria are not met, the validation rule triggers an error message and prevents the user from saving the record until the issues are resolved.

Activity 1: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.



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.

Activity 2: 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}"))

Validation Rule Edit [Save] [Save & New] [Cancel]

Rule Name:

Active: ☒

Description:

Error Condition Formula:

Quick Tips: Operators & Functions

! = Required Information

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.

Insert Field Insert Operator

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

Check Syntax

Function List: ACOS, ADDMONTHS, AND, ASCII, ASIN, Insert Selected Function, ABS(number), Returns the absolute value of a number, a number without its sign, Help on this function

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is true

Error Message:

This error message can either appear at the top of the page or below a specific field on the page

Milestone 7-Duplicate Rule

Duplicate rules are applied when a user tries to save a record and are used to check if the data meets specified criteria. If the criteria are not met, the validation rule triggers an error message and prevents the user from saving the record until the issues are resolved.

Activity 1: To Create A Matching Rule To An Customer Details

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

The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'Data', 'Duplicate Management', 'Matching Rules' is selected. The main content area is titled 'Matching Rules'. Below the header, there's a section 'What Are Matching Rules?' with a 'New Rule' button circled in green. A table below shows columns for Action, Rule Name, Object, Status, Description, Last Modified Date, and Last Modified By.

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

The screenshot shows the 'New Matching Rule' wizard, Step 1: Select object. The 'Object' dropdown is set to 'Customer Details' and is circled in green. A green arrow points to the 'Next' button. The 'Next' button is also circled in green.

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.

The screenshot shows the 'Rule Details' form. The 'Object' is 'Customer Details'. The 'Rule Name' is 'matching Customer deta' and the 'Unique Name' is 'matching_Customer_det'. The 'Matching Criteria' section shows 'Gmail' and 'Phone Number' selected with 'Exact' matching methods. A green arrow points to the 'Save' button.

Matching Rule
matching Customer details

Help for this Page ?

Matching Rule Detail

Object: Customer Details

Rule Name: matching Customer details

Unique Name: matching_Customer_details

Description: (Customer Details: Email EXACT MatchBlank = FALSE) AND (Customer Details: Phone_Number EXACT MatchBlank = FALSE)

Status: Inactive

Created By: project.2, 25/09/2023, 10:15 am

Modified By: project.2, 10/10/2023, 3:32 pm

Buttons: Edit, Delete, Clone, Activate

Left Sidebar:

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

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

SETUP Duplicate Rules

All Duplicate Rules

What Are Duplicate Rules? [Expand]

View: All Duplicate Rules

Rule Name	Description	Matching Rule	Active	Last Modified By	Last Modified Date
Customer Detail duplicate		matching Customer details	<input type="checkbox"/>	62	10/10/2023
Standard Account Duplicate Rule	Identify accounts that duplicate other accounts.	Standard Account Matching Rule	<input checked="" type="checkbox"/>	62	24/09/2023
Standard Contact Duplicate Rule	Identify contacts that duplicate other contacts and leads.	Standard Lead Matching Rule	<input checked="" type="checkbox"/>	62	24/09/2023
Standard Lead Duplicate Rule	Identify leads that duplicate other leads and contacts.	Standard Contact Matching Rule	<input checked="" type="checkbox"/>	62	24/09/2023

New Rule dropdown menu:

- Account
- Appointment
- Billing details and feedback
- Contract
- Customer Details**
- Environment
- Individual
- Laptop
- Lead

Activity2-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.
- Give the Rule name as : Customer Detail duplicate
- Scroll a little in Matching rule section
- Select the matching rule : Matching customer details
- And Click on save.
- After saving the Duplicate Rule, Click on Activate.

Edit Duplicate Rule
Customer Detail duplicate

Help for this Page ?

Duplicate Rule Edit

Buttons: Save, Save & New, Cancel

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: Email 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	
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Add Filter Logic...

Save Save & New Cancel

Milestone 8-Profiles

Profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls "Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

Types of profiles in salesforce

1.Standard profiles:

By default salesforce provides below standard profiles.

- Contract Manager
- Read Only
- Marketing User
- Solutions Manager
- Standard User
- System Administrator.

We cannot deleted standard ones

Each of these standard ones includes a default set of permissions for all of the standard objects available on the platform.

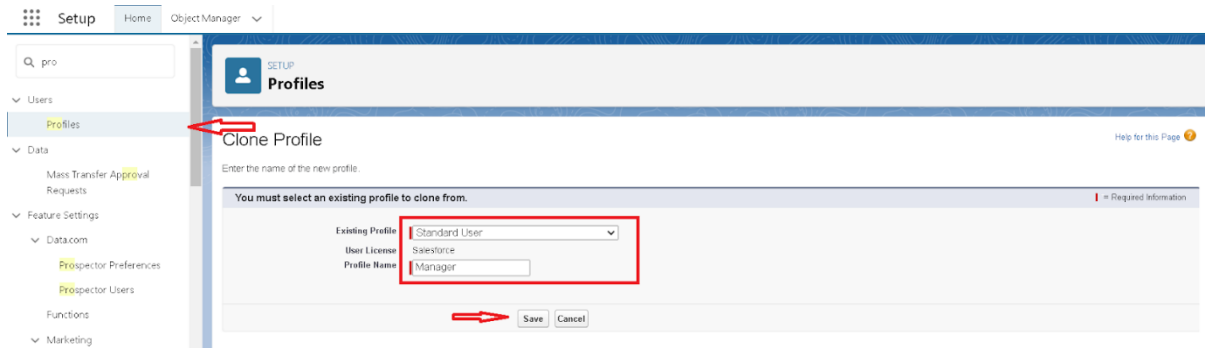
2.Custom Profiles:

Custom ones defined by us.

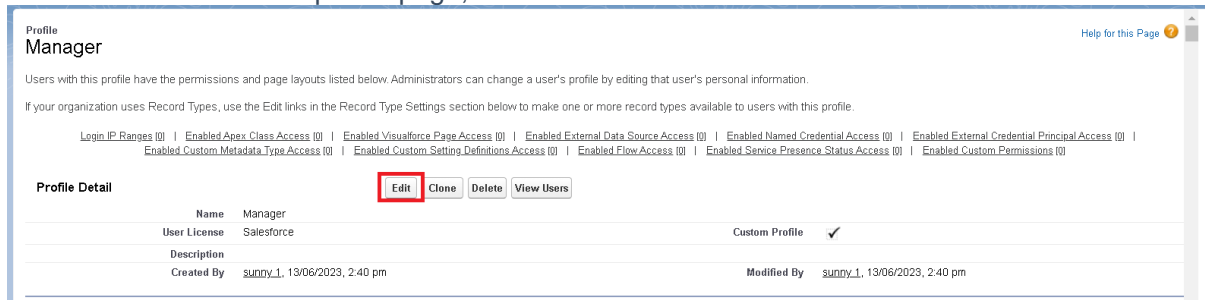
They can be deleted if there are no users assigned with that particular one.

Activity 1-Manger 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.

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

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.

Activity 2-Sales Person Profile

- 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.
- 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.

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"/>

5. And click save.

Milestone 9-Role & Role Hierarchy

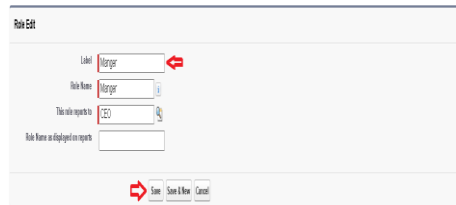
A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

Activity1-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.

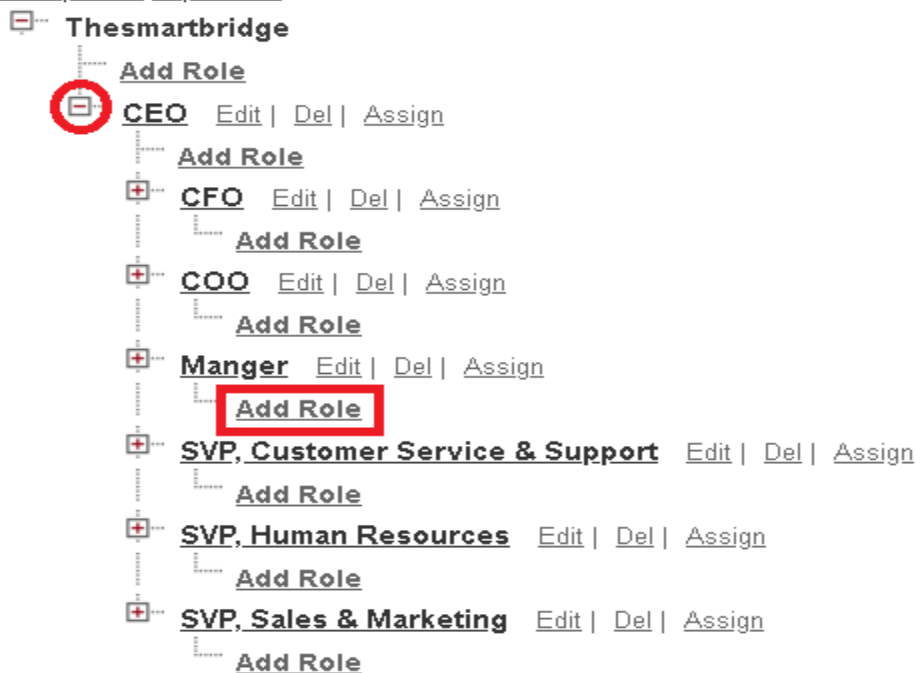
3. Give Label as “Manager” and Role name gets auto populated. Then click on Save.



Activity2-Creating Another Roles

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.

[Collapse All](#) [Expand All](#)



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

Milestone 10-Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in

Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

Activity1-Create Users

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: nmika
Email:
Username: Mikaelson@Niklaus
Nickname: nik
Title:
Company:
Department:
Division:

Role: Manger
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--

3. Save.

Milestone 11-Public Groups

Public groups are a valuable tool for Salesforce administrators and developers to streamline user management, data access, and security settings. By creating and using public groups effectively, you can maintain a secure and organized Salesforce environment while ensuring that users have appropriate access to the resources they need.

Activity1-Creating New Public Group

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

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

Label	Group Name	Created By	Created Date
No records to display			

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.

Group Information [Save] [Cancel]

New Public Group ⓘ = Required Information

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] [Remove]

Add to Delegated Administration Groups

Milestone 12-Sharing Setting

Salesforce allows you to configure sharing settings to control how records are accessed and shared within your organization. These settings are crucial for maintaining data security and privacy. Salesforce provides a variety of tools and mechanisms to define and enforce sharing rules

Activity1-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 cases ☒ ⓘ

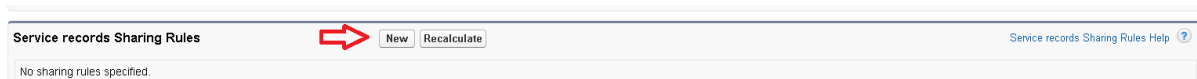
Secure guest user record access ☒ ⓘ

Requires permission to view record names in lookup fields ☐ ⓘ

[Save] [Cancel]

3. Click on save and refresh.

4. Scroll down a bit, Click new on Service records sharing Rules.
- 5.



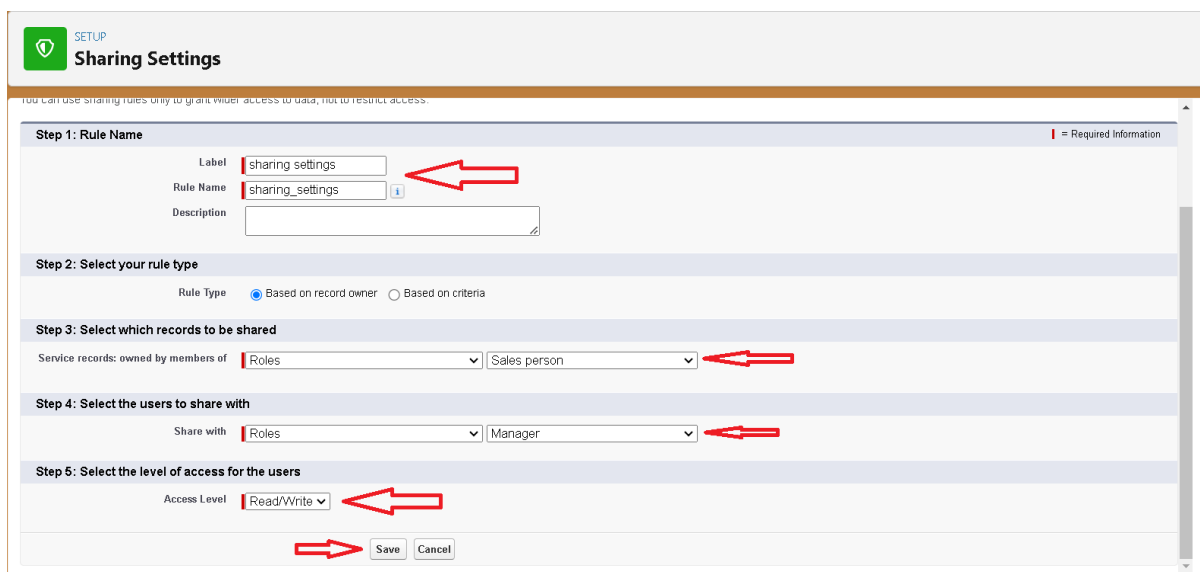
Service records Sharing Rules

No sharing rules specified.

New Recalculate

Service records Sharing Rules Help ?

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.



SETUP Sharing Settings

You can use sharing rules only to grant wider access to data, not to restrict access.

Step 1: Rule Name

Label sharing settings

Rule Name sharing_settings

Description

Step 2: Select your rule type

Rule Type ☒ Based on record owner ☐ Based on criteria

Step 3: Select which records to be shared

Service records: owned by members of Roles Sales person

Step 4: Select the users to share with

Share with Roles Manager

Step 5: Select the level of access for the users

Access Level Read/Write

Save Cancel

Milestone 15-Reports

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

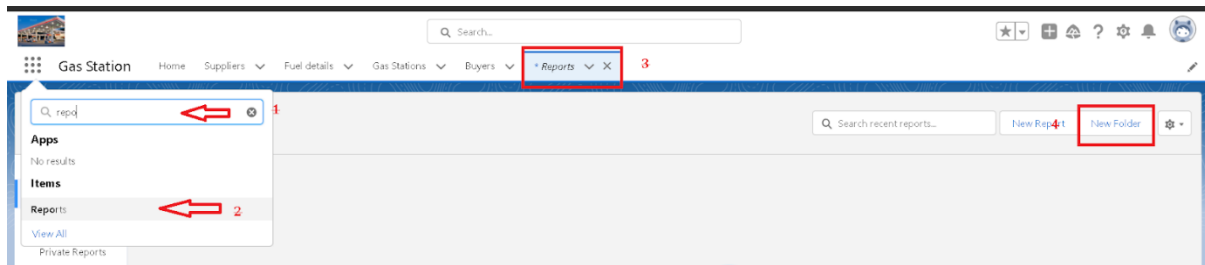
Types of Reports in Salesforce

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

Activity1-Create A Report Folder

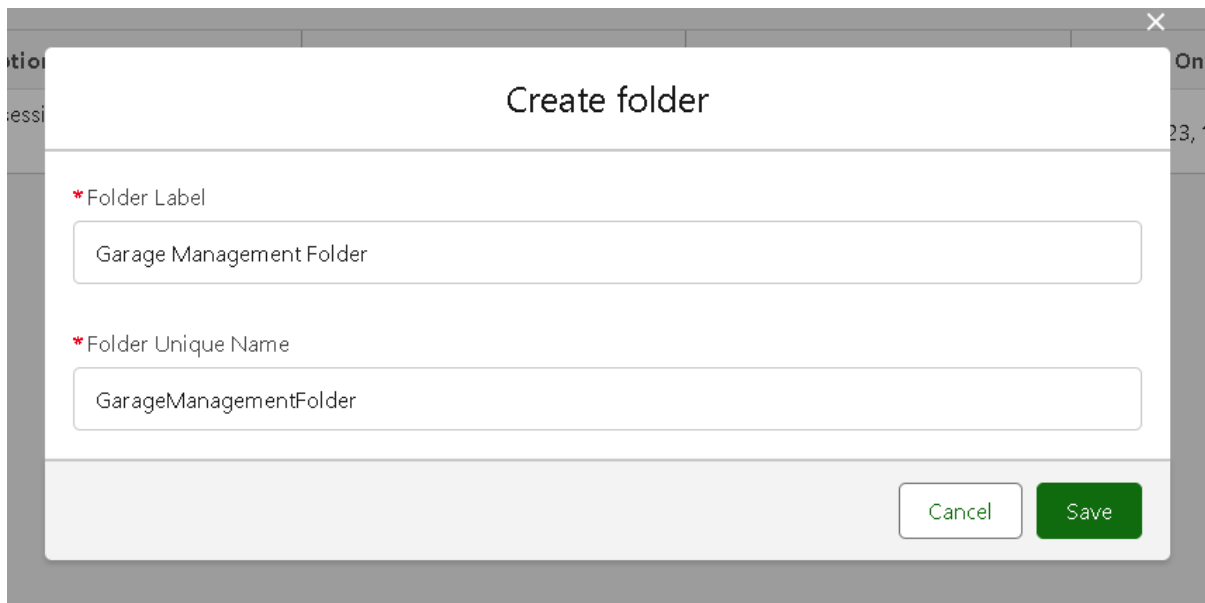
1. Click on the app launcher and search for reports.

2. Click on the report tab, click on new folder.



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

4. Click save.

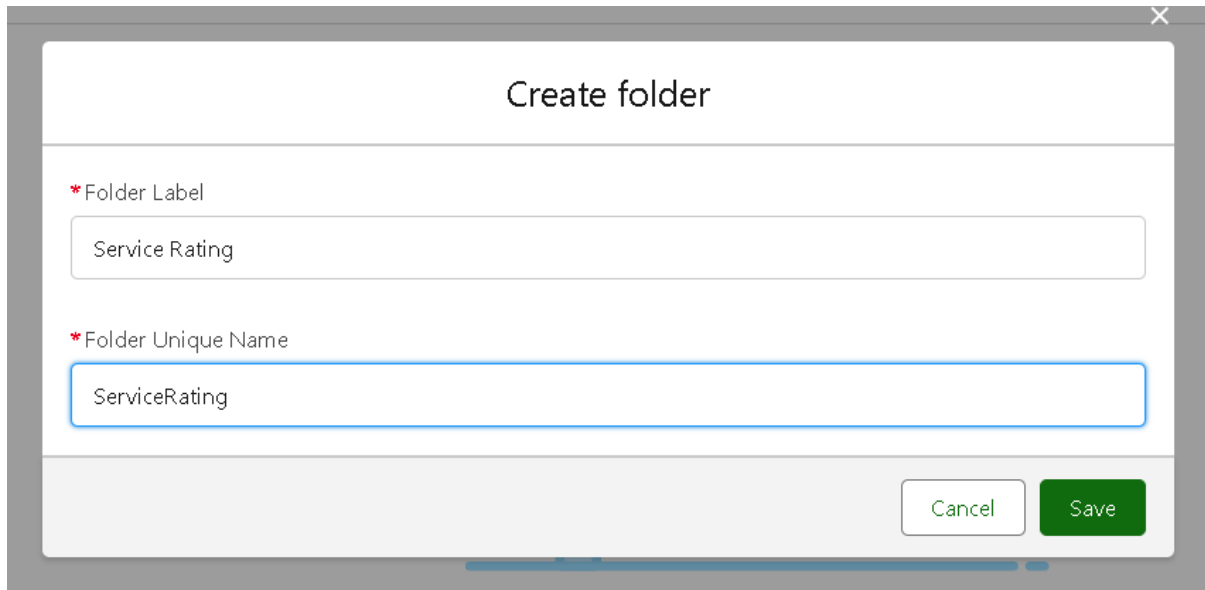


Milestone 16-Dashboards

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

Activity1-Create 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

Cancel Save

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

Milestone 17-User Adoption

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

Activity1-Creating 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.

New Customer Detail

* = Required Information

Information

* Customer Name ↶

Phone number ↶

Gmail ↶

Owner
 Annapurna SmartBridge

Cancel
Save & New
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.

Garage Manageme...
Customer Details ▾
Appointments ▾
Service records ▾
Billing details and feedback ▾
Reports ▾
Dashboards ▾

Appointment

app-016

Appointment Name
app-016

Owner
 Annapurna SmartBridge

Customer Details ↶

✕

* Appointment Date ↶

Maintenance service ↶
☒

Repairs ↶
☒

Replacement Parts
☐

Service Amount ↶

* Vehicle number plate

Created By
 Annapurna SmartBridge, 18/11/2024, 3:28 pm

Cancel
Save

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.

New Service record

* = Required Information

Information

Service Record Name

Owner
Annapurna SmartBridge

* Appointment
app-016

Quality Check Status
☐

Service Status
Started

Cancel Save & New Save

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

Service Record Name
ser-010

Owner
Annapurna SmartBridge

* Appointment
app-016

Quality Check Status
☒

Service Status
Started

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

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

Cancel Save

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

Related

Details

Service Record Name

ser-010

Owner



[Annapurna SmartBridge](#)



Appointment

[app-016](#)



Quality Check Status



Service Status

Completed



service date

18/11/2024

Created By



[Annapurna SmartBridge](#), 18/11/2024, 4:32 pm

Last Modified By



[Annapurna SmartBridge](#), 18/11/2024, 4:34 pm