Garage Management System

Mohammed Fasi Shaik
21501a05g0@pvpsit.ac.in

A Garage Management System (GMS) is a powerful tool that can overturn your automotive repair business. By streamlining operations, increasing efficiency, and enhancing customer satisfaction, a GMS empowers your garage to thrive in today's competitive market.

Key Benefits of a GMS:-

- **Simplified Appointment Scheduling:** Effortlessly manage bookings and optimizes your team's workload.
- **Efficient Vehicle Management:** Tracks vehicle history, maintenance schedules, and real-time status updates.
- **Enhanced Customer Relationships:** Build loyalty through personalized service and timely communication.
- **Optimized Inventory Control:** Streamline parts management and reduce costs.
- **Streamlined Work Order Management:** Create detailed work orders, track progress, and improve job efficiency.
- **Comprehensive Reporting and Analytics:** Gain valuable insights to make informed business decisions.

A GMS is designed to meet the needs of mechanics, service advisors, and business owners alike. With a user-friendly interface and a range of customizable features, a GMS can help your garage operate more smoothly, improve customer satisfaction, and finally boost your bottom line.

It offers a range of features including efficient appointment scheduling, detailed vehicle management, robust customer relationship management, optimized inventory control, streamlined work order management, and insightful reporting and analytics. By automating tasks, reducing errors, and providing valuable insights, a GMS empowers garages to improve productivity, enhance customer satisfaction, and finally drive business growth.

Salesforce

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 have answered yes to any of these questions, then you are 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 will take you through these features and answer the question, "What is Salesforce?".

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, cooperate and engage with employees and partners, and store your data securely in the cloud.So what does it indicate? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

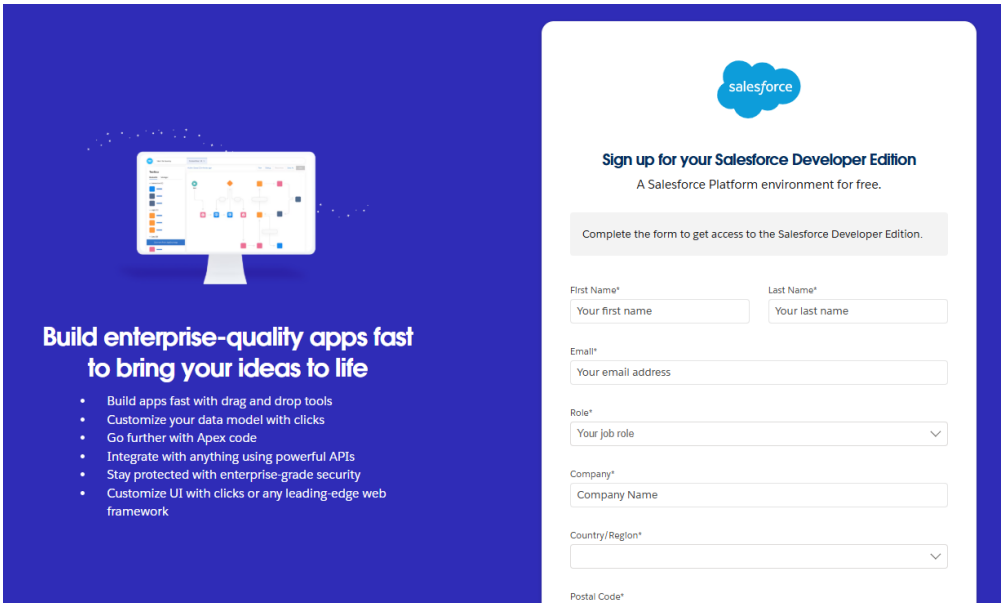
https://youtu.be/r9EX3lGde5k

Creating Developer Account:

Creating a developer organization in salesforce:

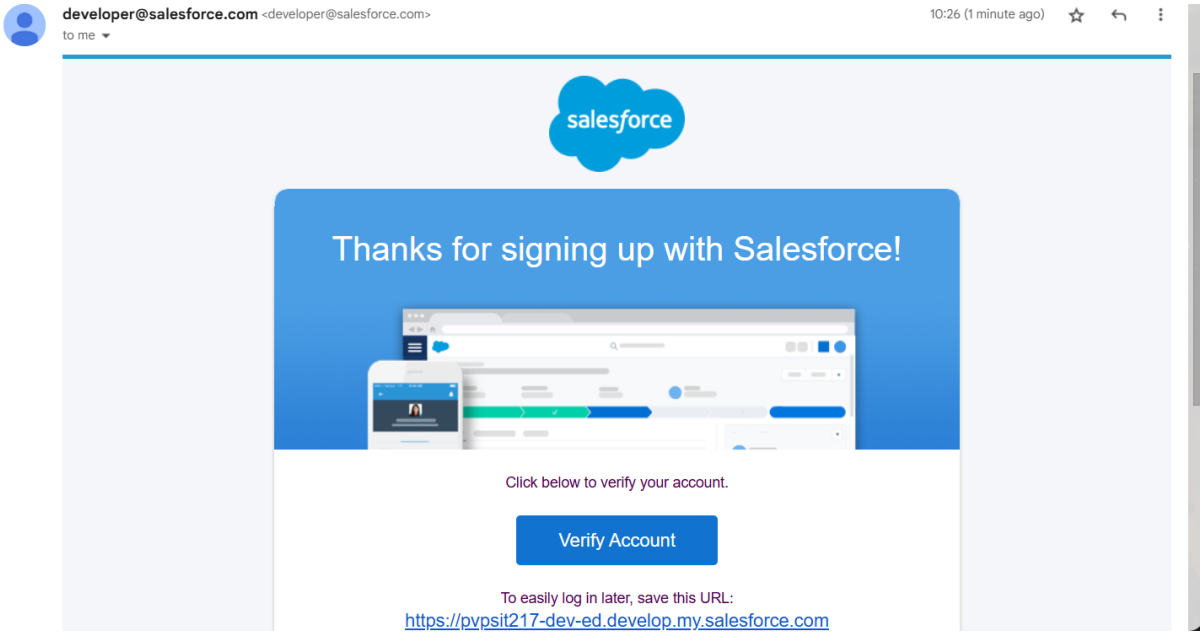
1. Go to https://developer.salesforce.com/signup
2. On the sign up form, enter the following details:
    - First name & Last name.
    - Email.
    - Role: Developer.
    - Company: College Name.
    - County: India.
    - Postal Code: pin code.
    - Username : should be a combination of your name and company This need not be an actual email id, you can give anything in the below format: username@organization.com.

3. Click on sign me up after filling these.

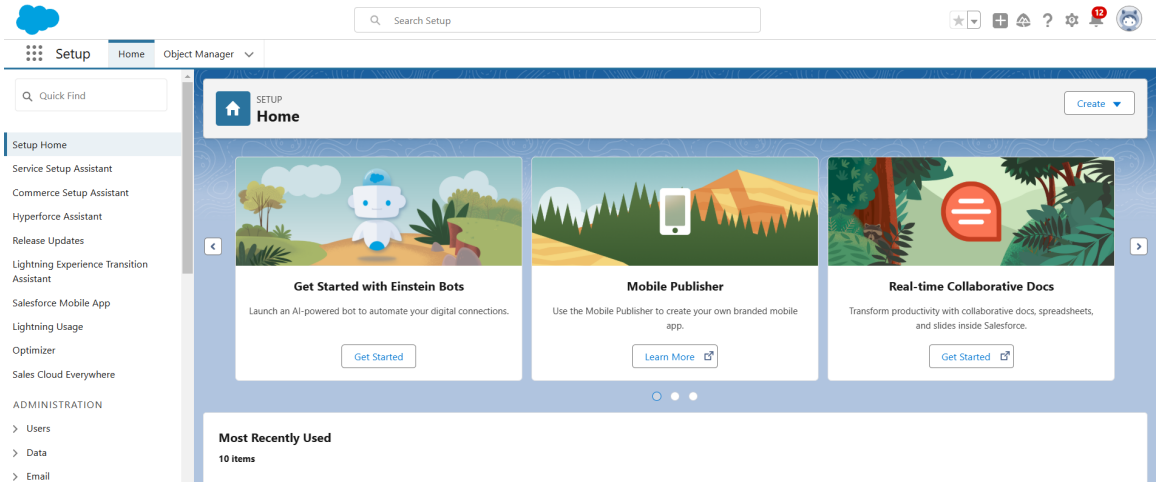


Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account.



2. Click on Verify Account.
3. Give a password and answer a security question and click on change password.
4. Then you will redirect to your salesforce setup page.



OBJECT

What Is an Object?

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

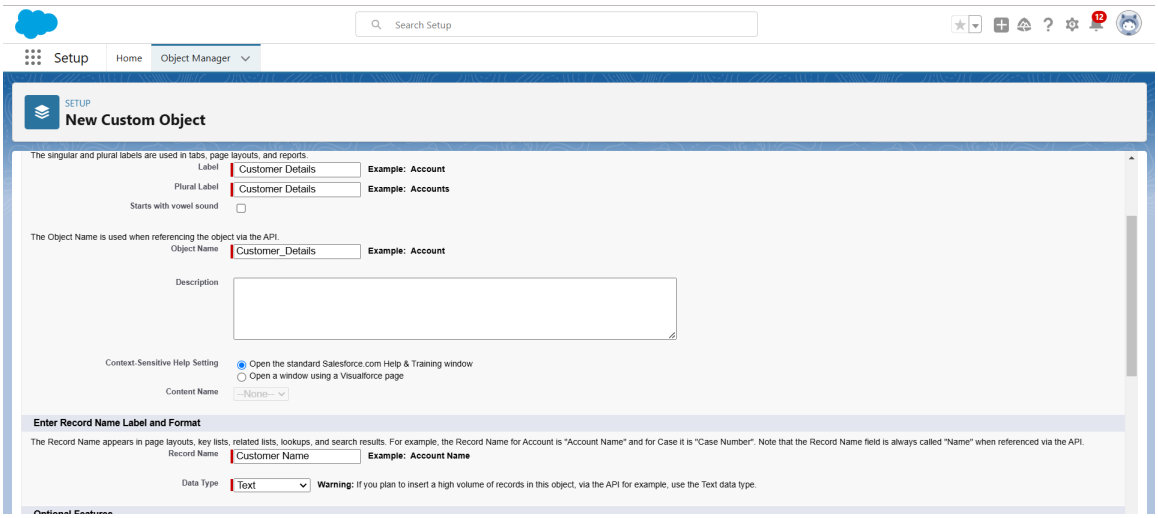
Salesforce objects are of two types:

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:

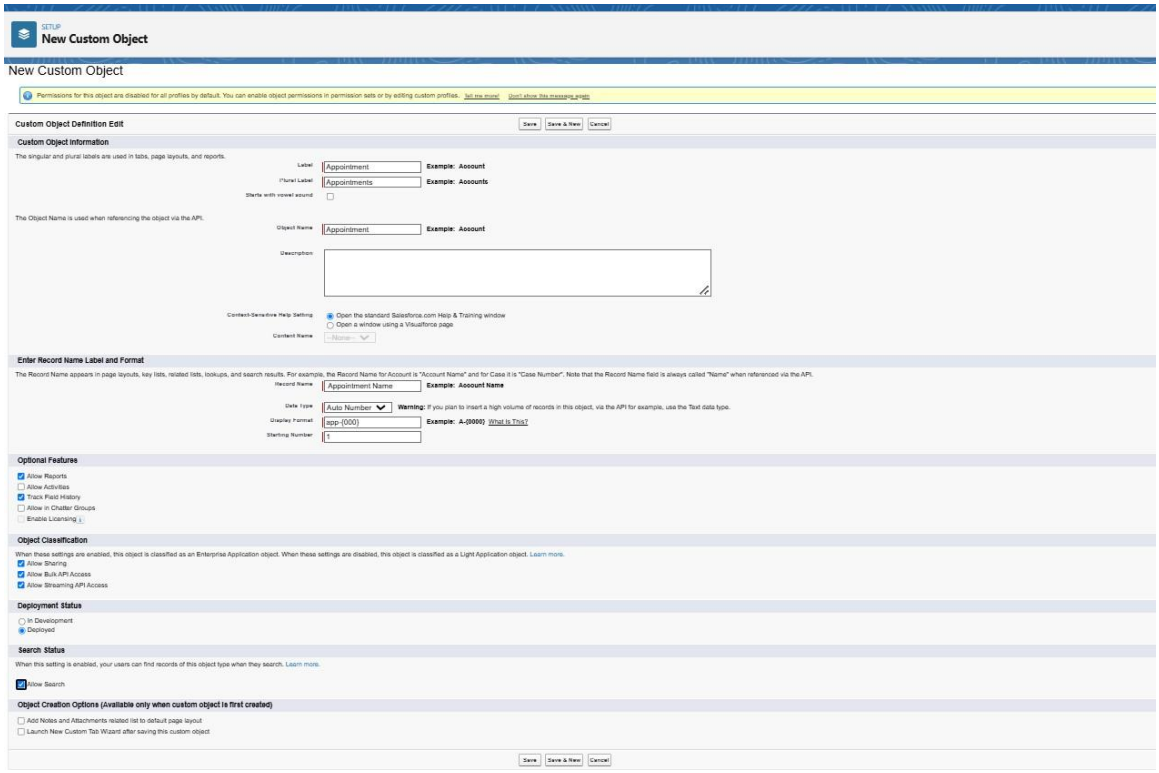
1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
    1. Enter the label name >> Customer Details
    2. Plural label name >> Customer Details
    3. Enter Record Name Label >> Customer Name
    4. Data Type >> Text
2. Click on Allow reports and Track Field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



Create Appointment Object

To create an object:

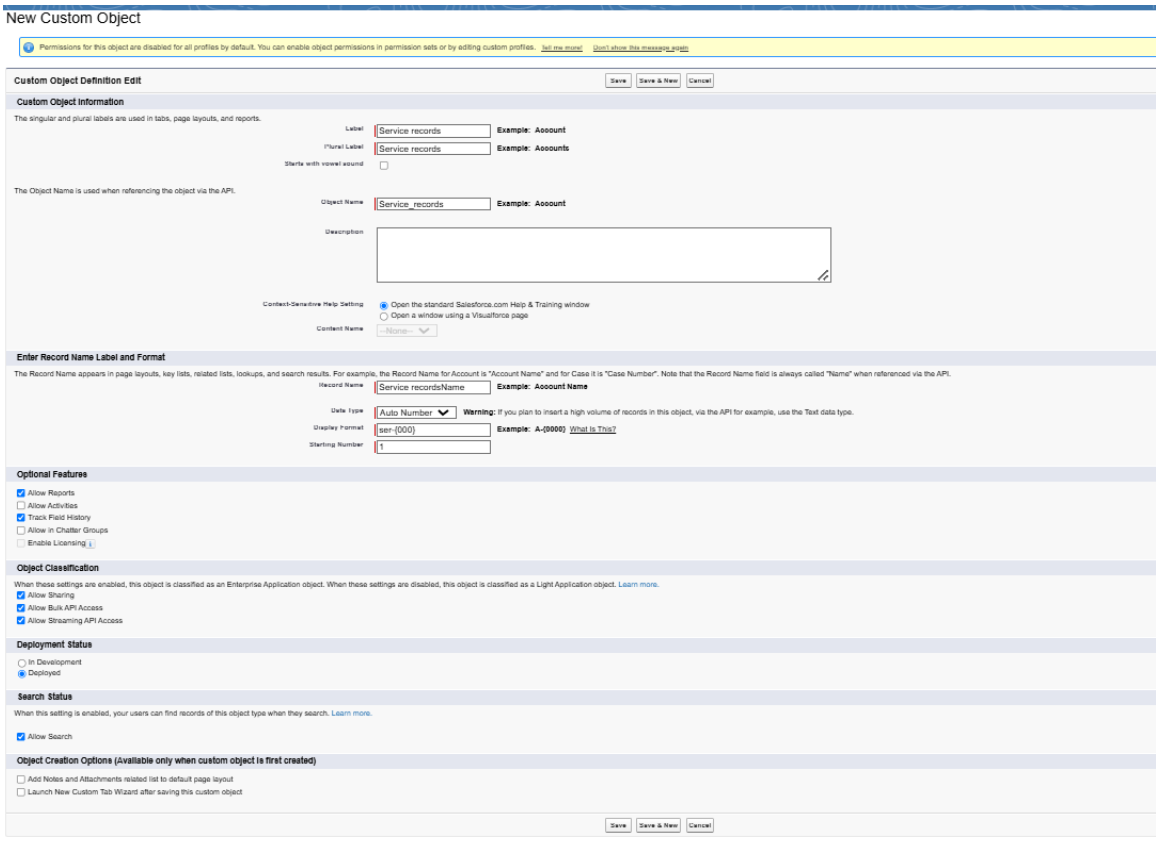
1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
    1. Enter the label name >> Appointment.
    2. Plural label name >> Appointments.
    3. Enter Record Name, Label, and Format:
        a. Record Name >> Appointment Name
        b. Data Type >> Auto Number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



Create Service records Object

To create an object:

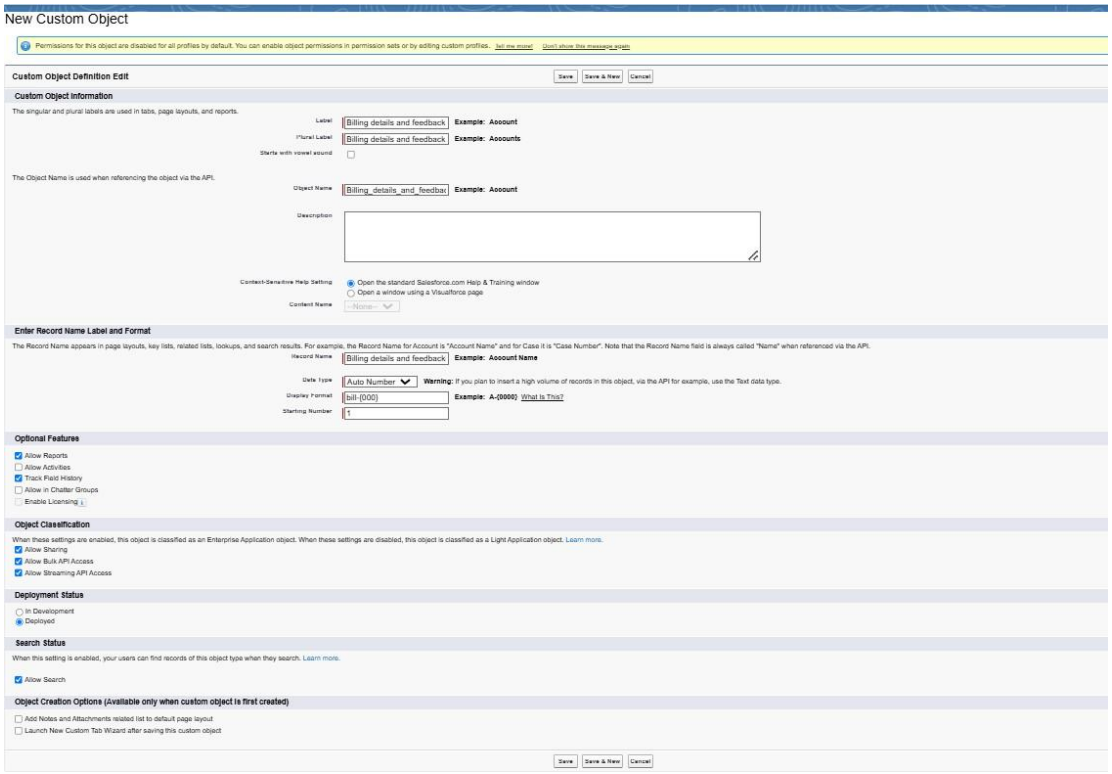
1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
    1. Enter the label name >> Service records
    2. Plural label name >> Service records
    3. Enter Record Name Label, and Format
        a. Record Name >>Service records Name
        b. Data Type >> Auto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



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

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

Types of Tabs:

1. **Custom Tabs**

   Custom object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.
2. **Web Tabs**

   Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window. Web tabs make it easier for your users to access content and applications they frequently use without leaving the salesforce.com application.
3. **Visual force Tabs**

   Visual force Tabs are custom tabs that display a Visual force page. Visual force tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.
4. **Lightning Component Tabs**

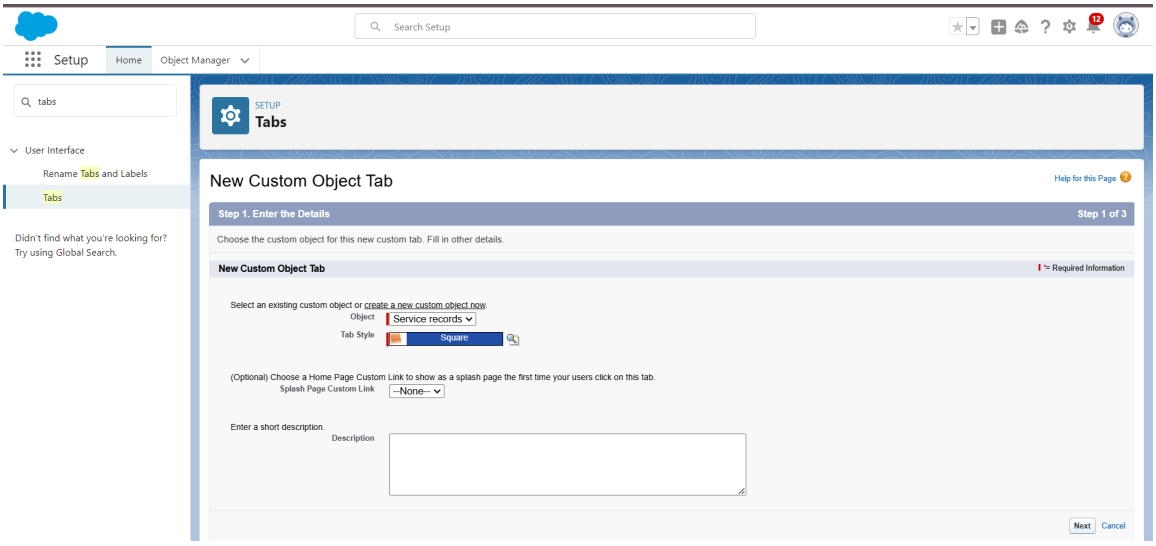
   Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.
5. **Lightning Page Tabs**

   Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu. Lightning Page tabs do not work like other custom tabs. Once created, they do not show up on the All Tabs page. When you click the Plus icon that appears to the right of your current tabs. Lightning Page tabs also do not show up in the Available Tabs list when you customize the tabs for your apps.

Creating a Custom Tab

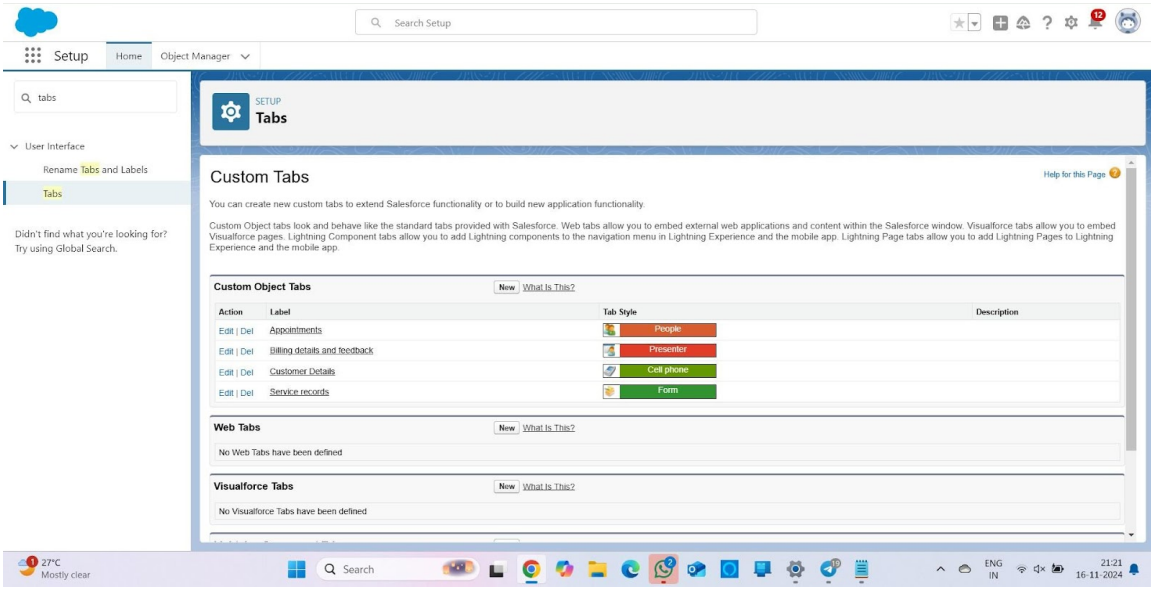
To create a Tab:(Customer Details)

1. Go to the setup page >> type Tabs in the Quick Find bar >> click on tabs >> New (under the 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. Ensure that the Append tab to users' existing personal customizations is checked.
4. Click save.



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.



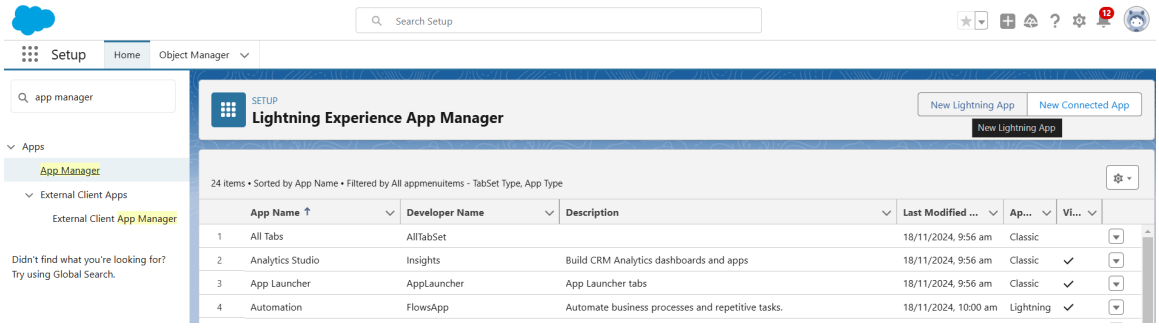
The Lightning App

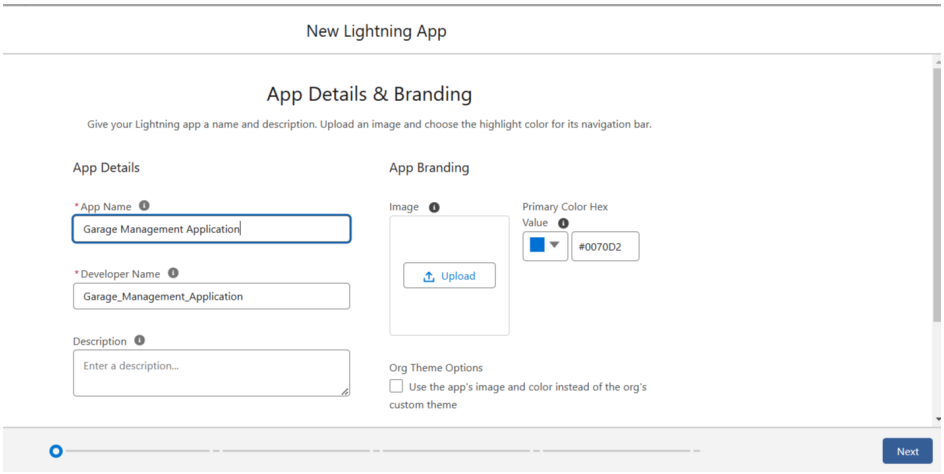
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.
Lightning apps let you brand your apps with a custom color and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

Create a Lightning App

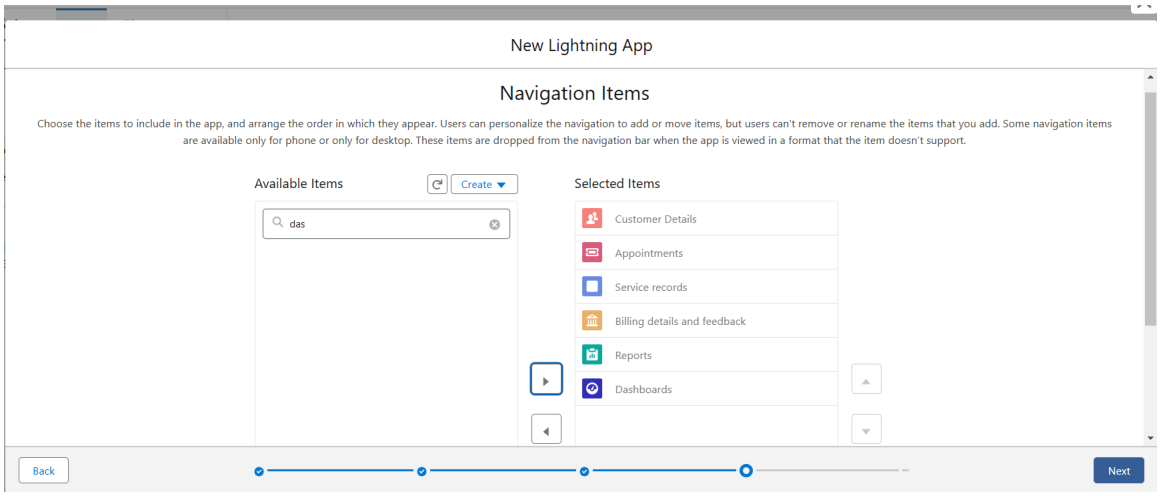
To create a lightning app page:

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

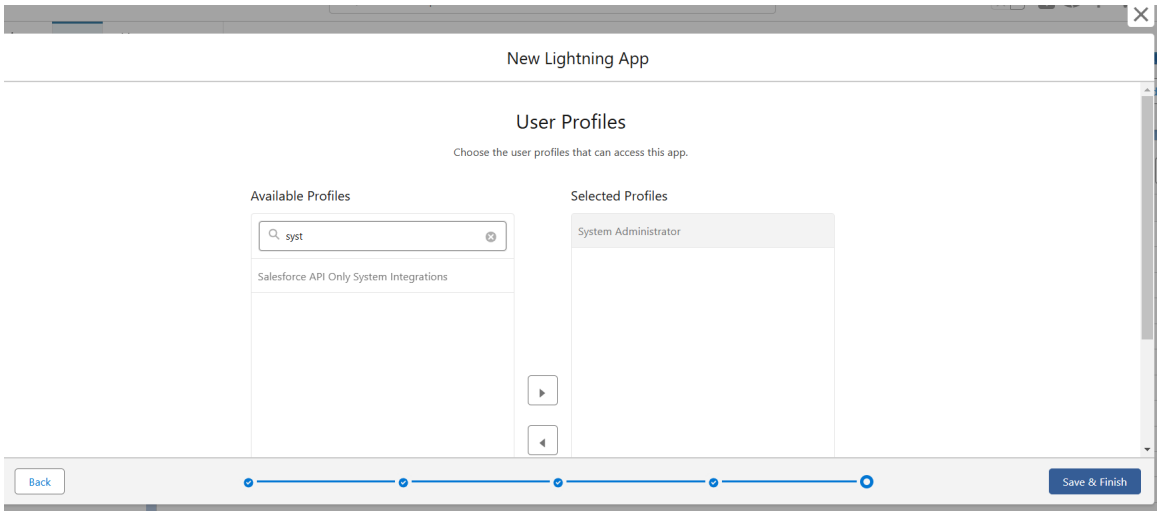




3. To Add Navigation Items:
4. Select the items (Customer Details,Appointments, Service records, Billing details and feedback, Reports and Dashboards) from the search bar and move them using the arrow button >> Next.



5. To Add User Profiles: Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.



Fields

When 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

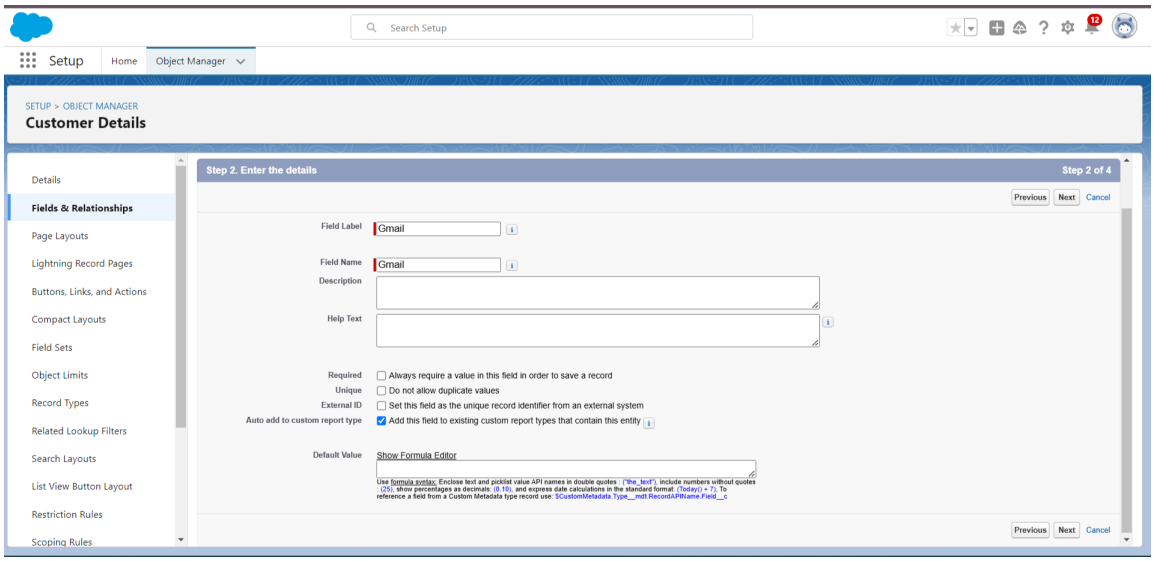
Creation of fields for the Customer Details object

1. **To create fields in an object:**

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

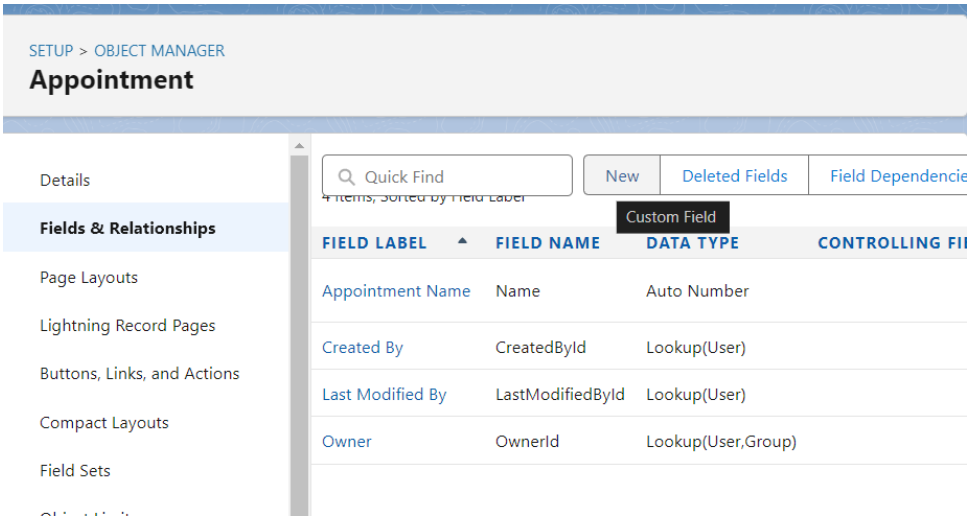


Creation of Lookup Fields

Creation of Lookup Field on Appointment Object :

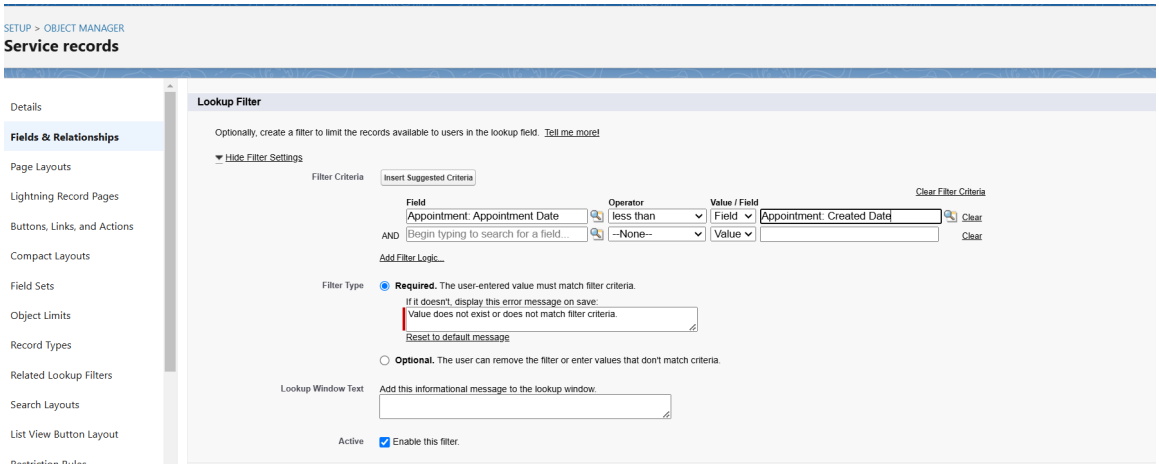
1. Go to setup >> click on Object Manager >> type object name(Appointment) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select “Look-up relationship” as data type and click Next.
4. Select the related object “Customer Details” and click next.
5. Next >>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

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



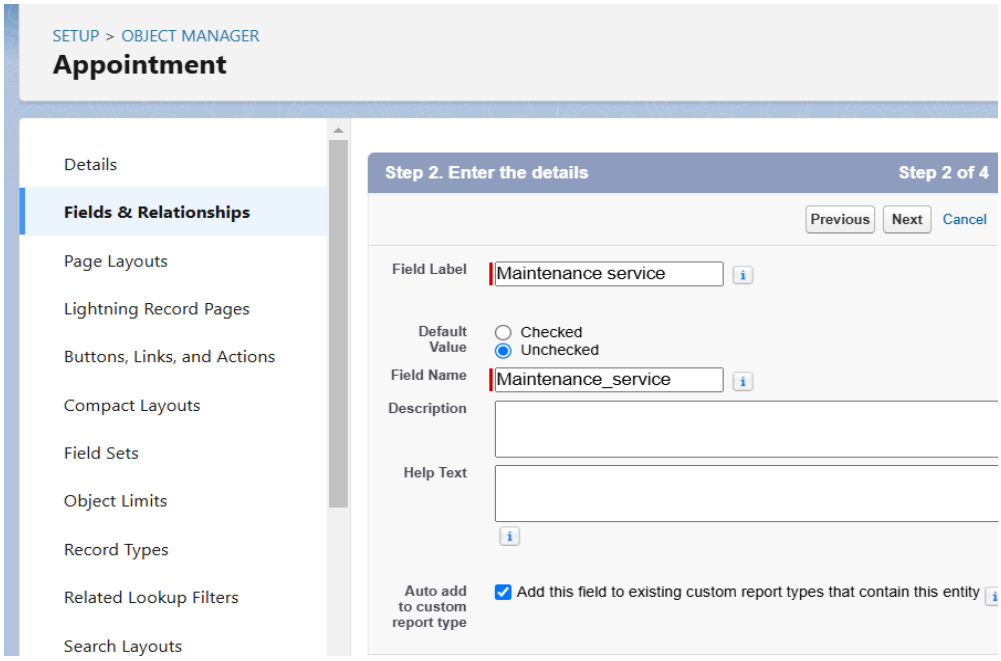
Creation of Lookup Field on Billing details and feedback Object :

1. Go to setup >> click on Object Manager >> type object name (Billing details and feedback) in 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.
4. Select the related object “ Service records” and click next.
5. Next >> Next >> Save & new.

Creation of Checkbox Fields

Creation of Checkbox Field on Appointment Object :

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



Creation of Another Checkbox Field on Appointment Object :

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

10. Click on next >> next >> save.

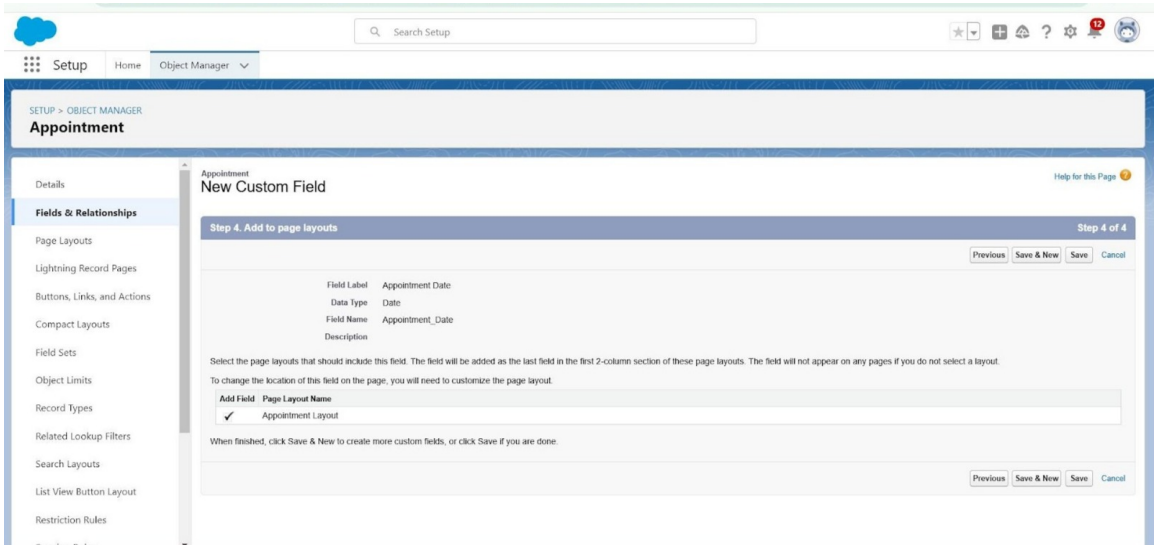
Creation of Checkbox Field on Service records Object :

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

Creation of date Fields

Creation of Date Field on Appointment Object :

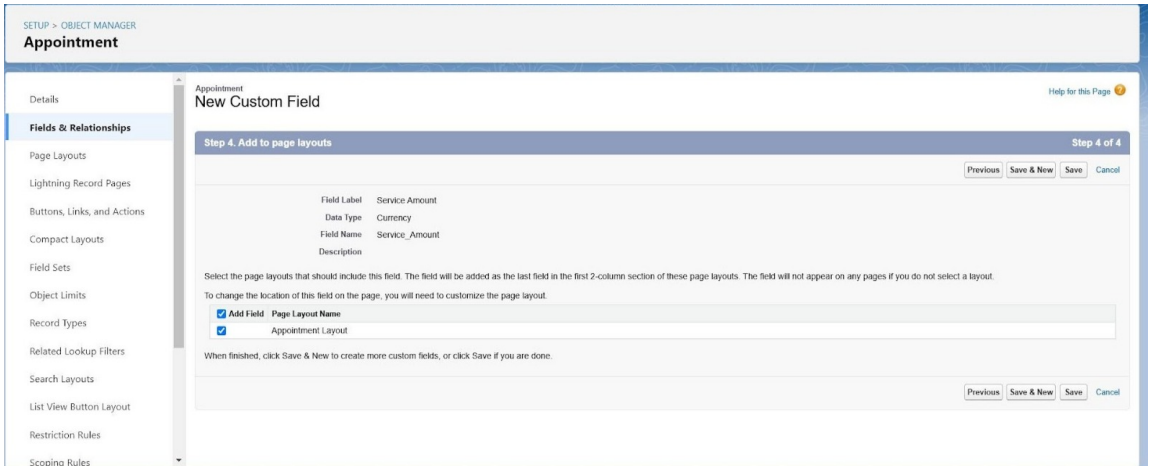
1. Go to setup >> click on Object Manager >> type object name(Appointment) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select “Date” as data type and click Next.
4. Give the Field Label : Appointment Date
5. Field Name : is auto filled
6. Make it as a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



Creation of Currency Fields

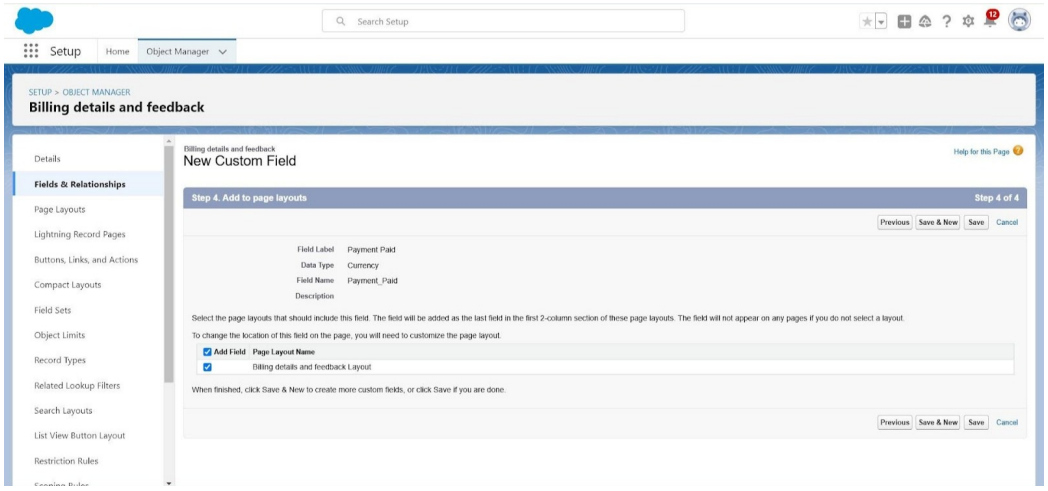
Creation of Currency Field on Appointment Object :

1. Go to setup >> click on Object Manager >> type object name (Appointment) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select “Currency” as data type and click Next.
4. Give the Field Label : Service Amount
5. Field Name : is auto filled
6. Click on next
7. Give read only for all the profiles in field level security for profile.
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 filled

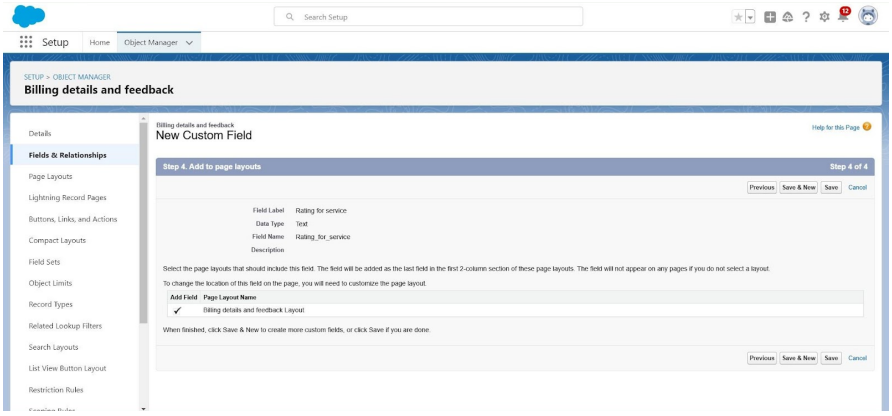


Creation of Text Fields

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 filled
6. Length : 10
7. Make field as Required and Unique.
8. Click on next >> next >> save.

Creation of Text Fields in Billing details and feedback object :

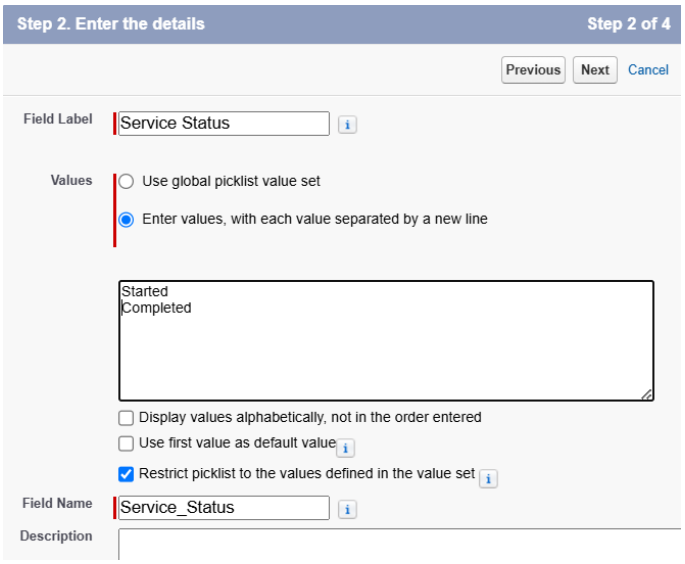
1. Go to setup >> click on Object Manager >> type object name (Billing details and feedback) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select “text” as data type and click Next.
4. Give the Field Label : Rating for service
5. Field Name : is auto filled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



Creation of Picklist Fields

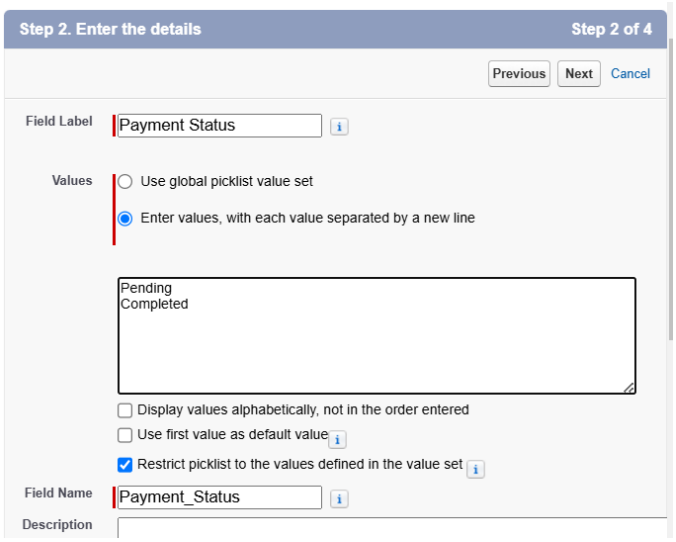
Creation of Picklist Fields in Service records object :

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



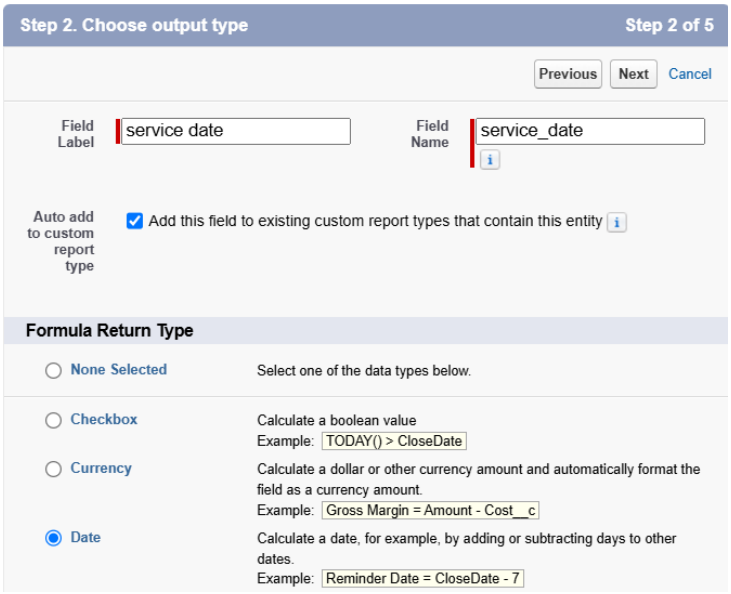
Creation of Picklist Fields in Billing details and feedback object :

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 apart by a new line” and enter values as shown below.
5. The values are: Pending, Completed.
6. Click Next >> Next >> Save.



Creating Formula Field in Service records Object

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



Validation rule

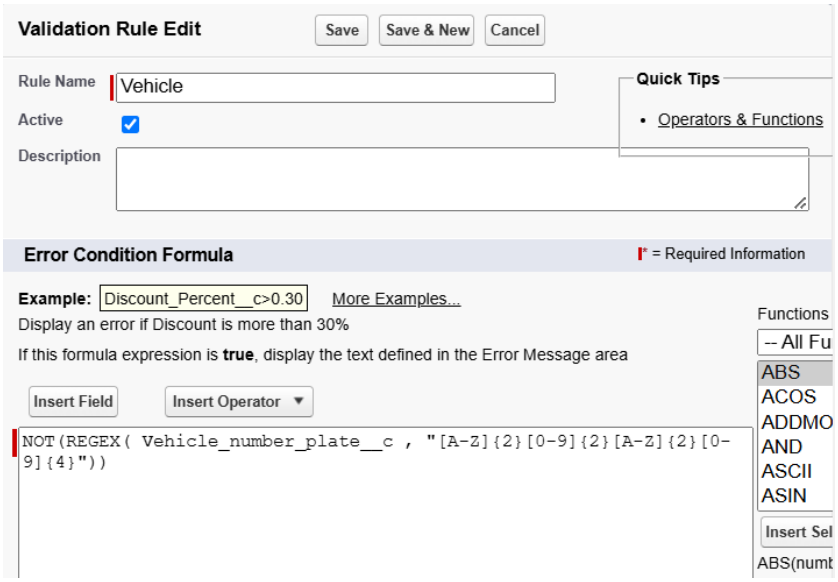
Validation rules are applied when a user tries to save a record and are used to check if the data meets specified criteria. If the standard are not met, the validation rule triggers an error message and prevents the user from saving the record until the issues are resolved.

To create a validation rule to an Appointment Object

1. Go to the setup page >> click on the object manager >> From the drop-down menu, 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.

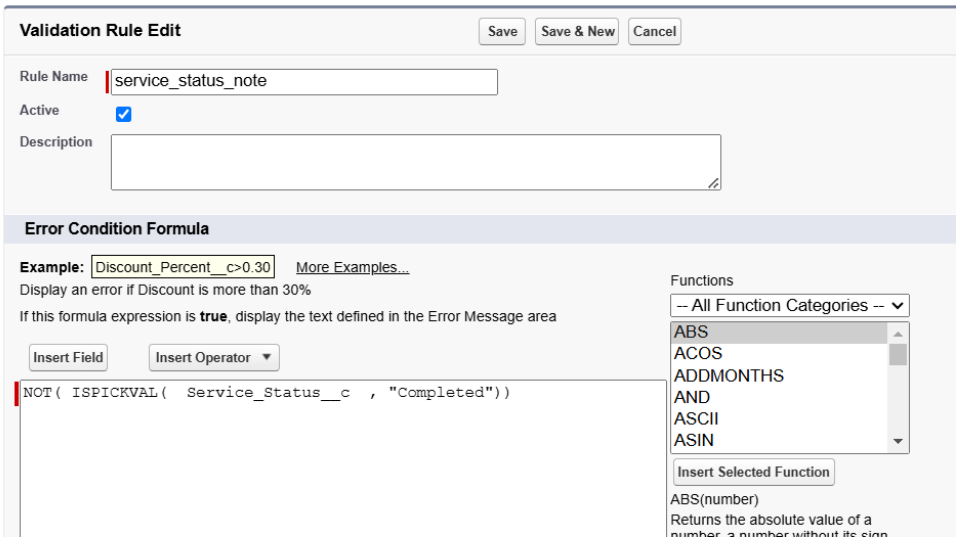


To create a validation rule to an Service records Object

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

NOT(ISPICKVAL(Service_Status_c , "Completed"))

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



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

1. Go to the setup page >> click on the object manager >> From the drop-down menu, 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 :

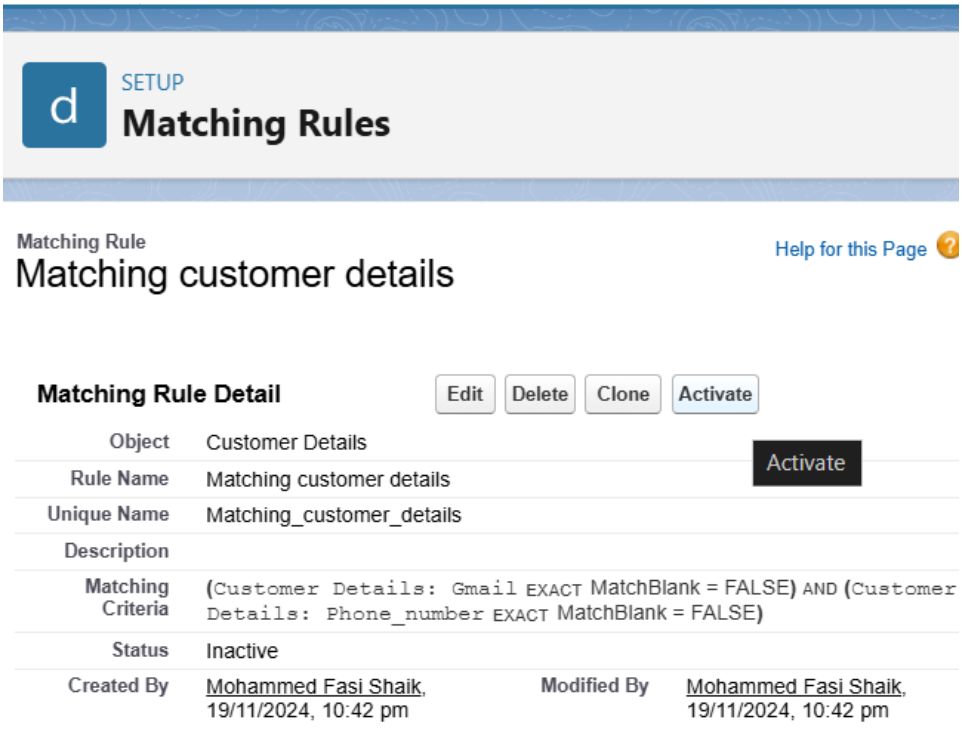
   NOT(REGEX(Rating_for_service_c , "[1-5]{1}"))

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.

Duplicate rule

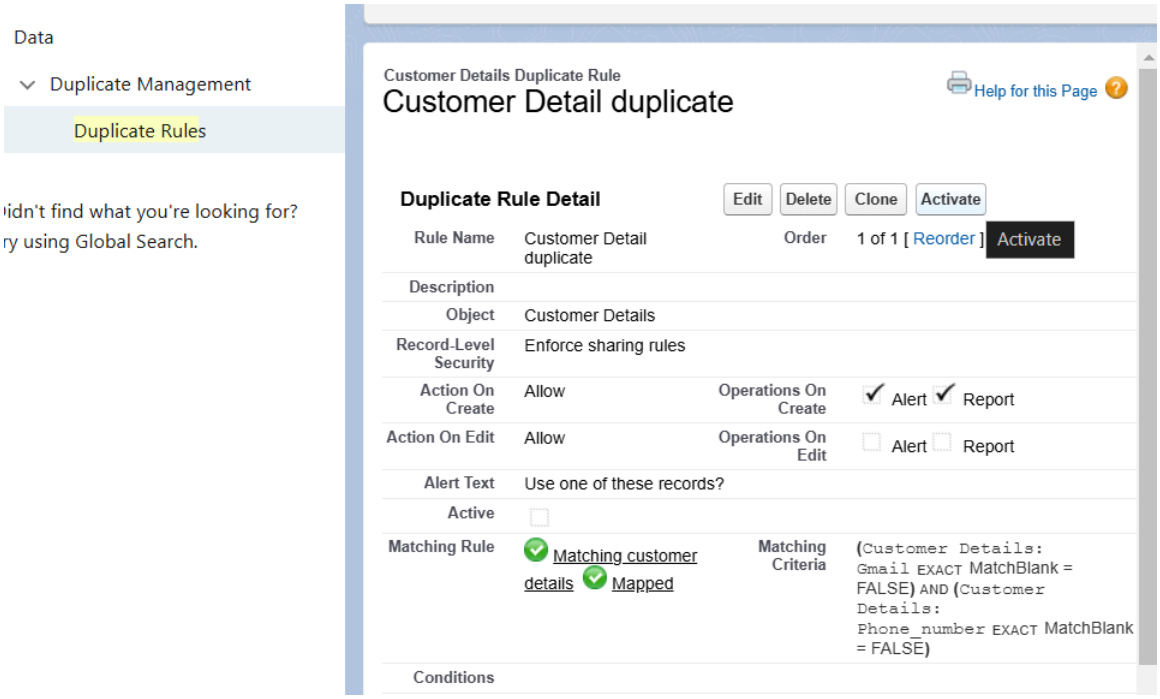
To create a matching rule to an Customer details Object

1. Go to quick find box in setup and search for matching Rule.
2. Click on the 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 filled
6. Define the matching standard as
7. Field Matching Method
    1. Gmail Exact
    2. Phone Number Exact
8. Click save.
9. After Saving, Click on Activate.



To create a Duplicate rule to an Customer details Object

1. Go to quick find box in setup and search for Duplicate rules.
2. Click on Duplicate rule >> click on New Rule >> select customer details object.
3. Give the Rule name as : Customer Detail duplicate
4. Scroll a little in the Matching rule section
5. Select the matching rule : Matching customer details
6. Also, Click on save.
7. After saving the Duplicate Rule, Click on Activate.



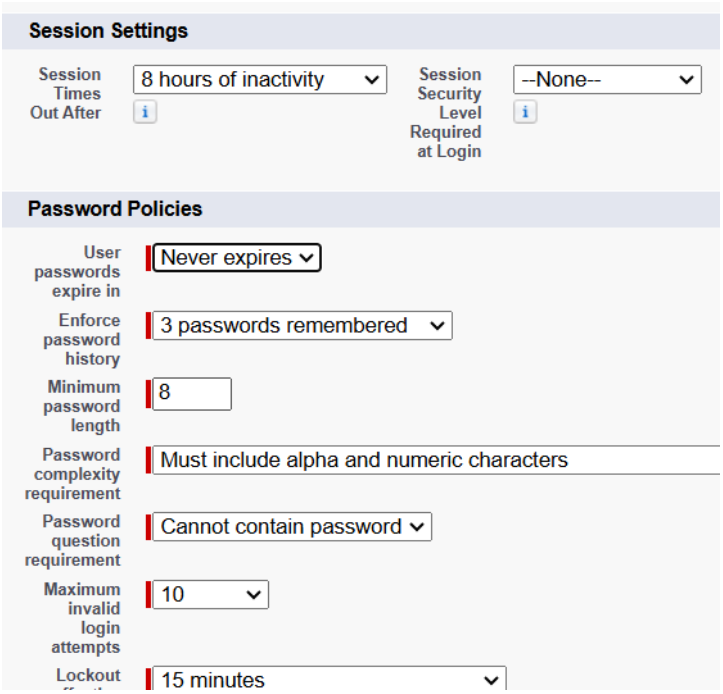
Profiles

A 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, Visual force 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.

Manager Profile

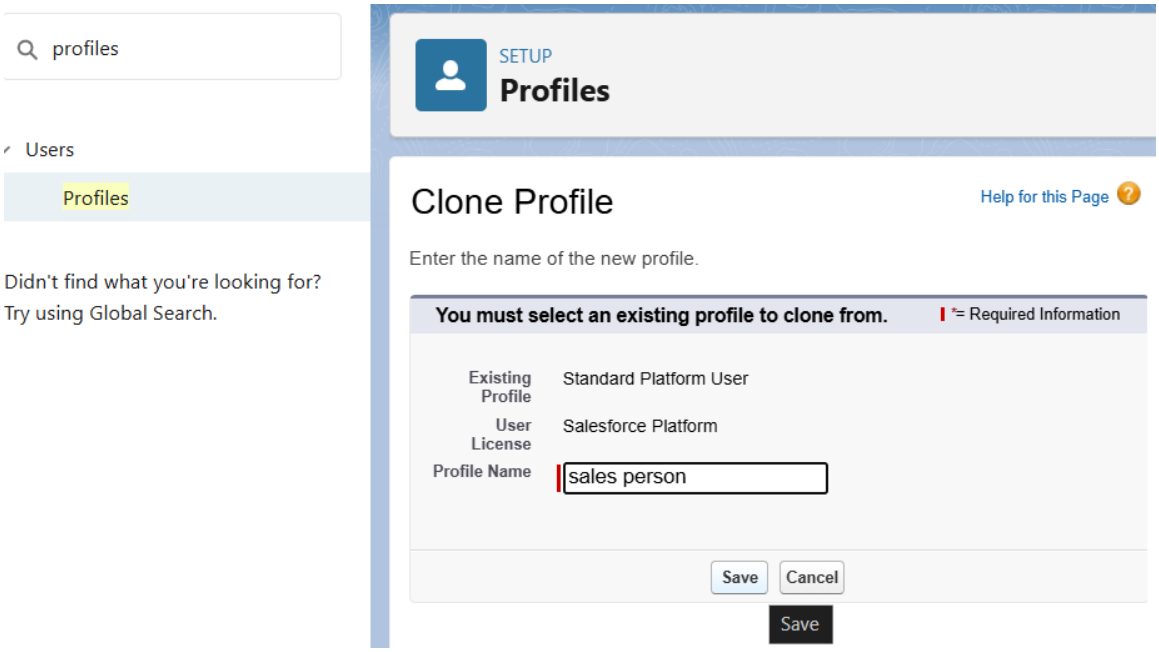
To create a new profile:

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard Platform 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 Garage management.
4. Scroll down to Custom Object Permissions and Give access permissions for Appointments,Billing details and feedback, service records, and customer details objects as mentioned in the below diagram.
5. Changing the session times out after should be “ 8 hours of inactivity”.
6. Change the password policies as mentioned :
7. User passwords expire in should be “ never expires ”.
8. Minimum password length should be “ 8 ”, and click save.



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 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. Also, click save.

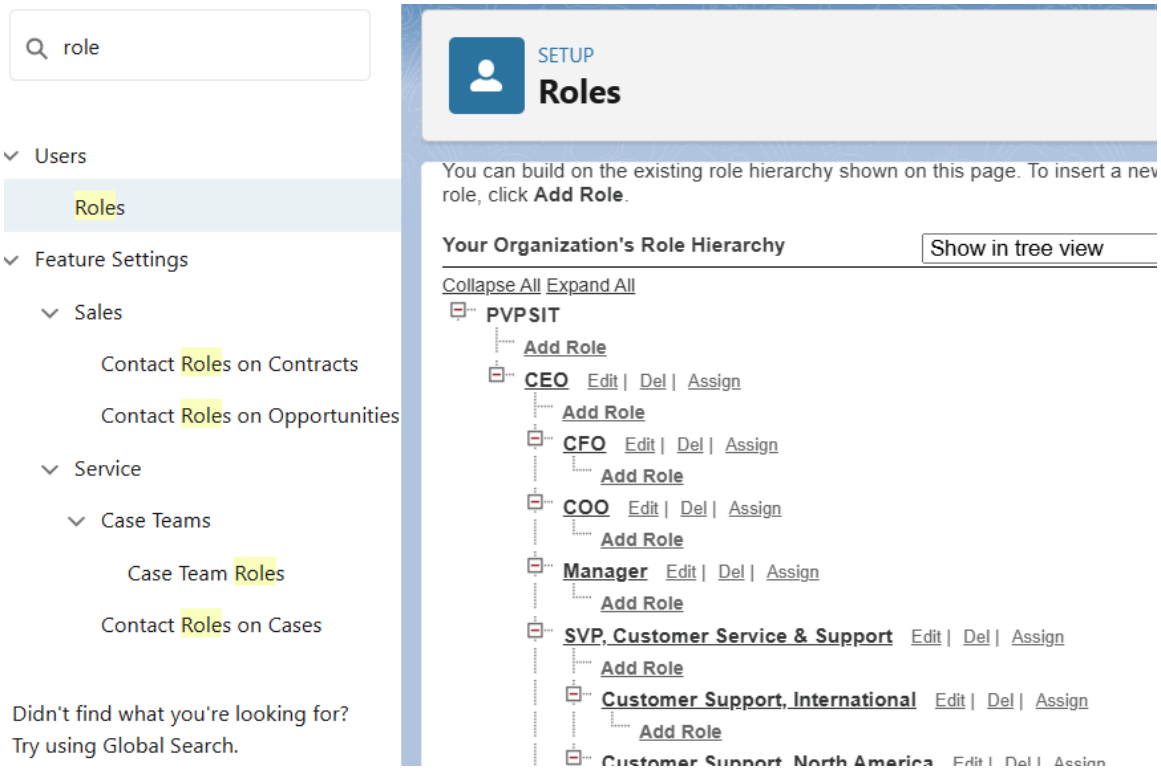


Role & Role Hierarchy

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.

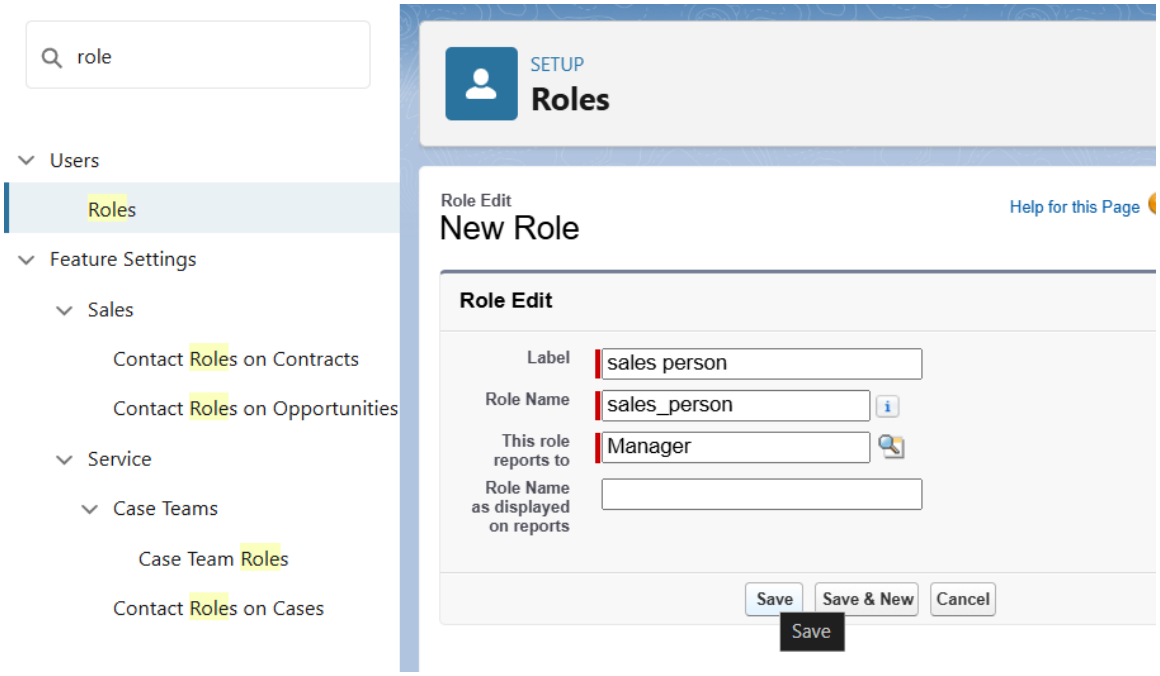
Creating Manager Role

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 filled. Then click on Save.



Creating another roles

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

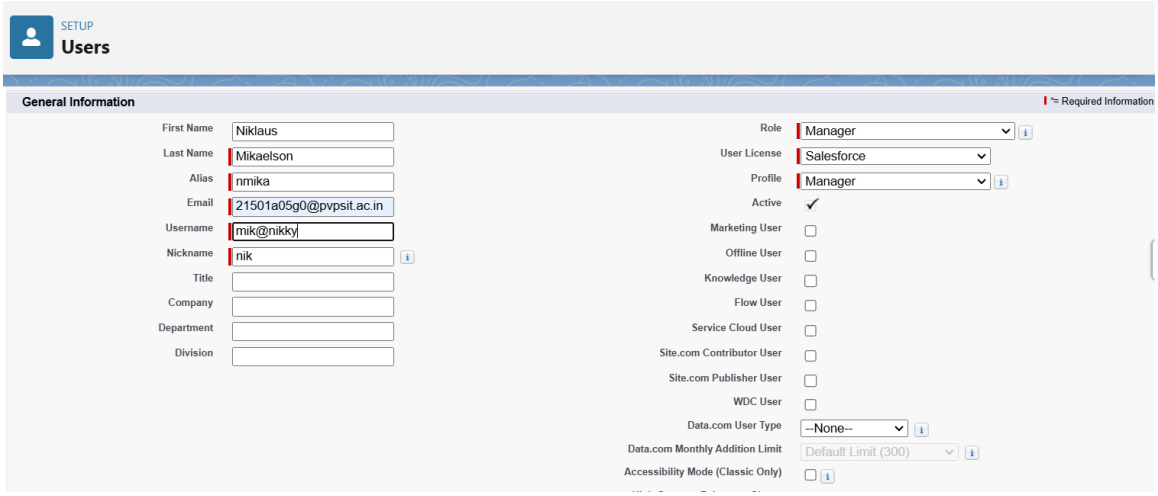


Users

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.

Create User

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



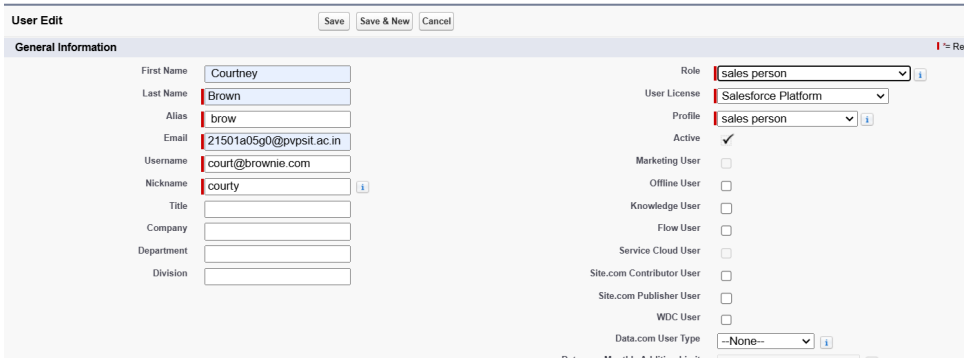
creating another users

1. Repeat the steps and create another user using
    1. Role : sales person
    2. User license : Salesforce Platform
    3. Profile : sales person

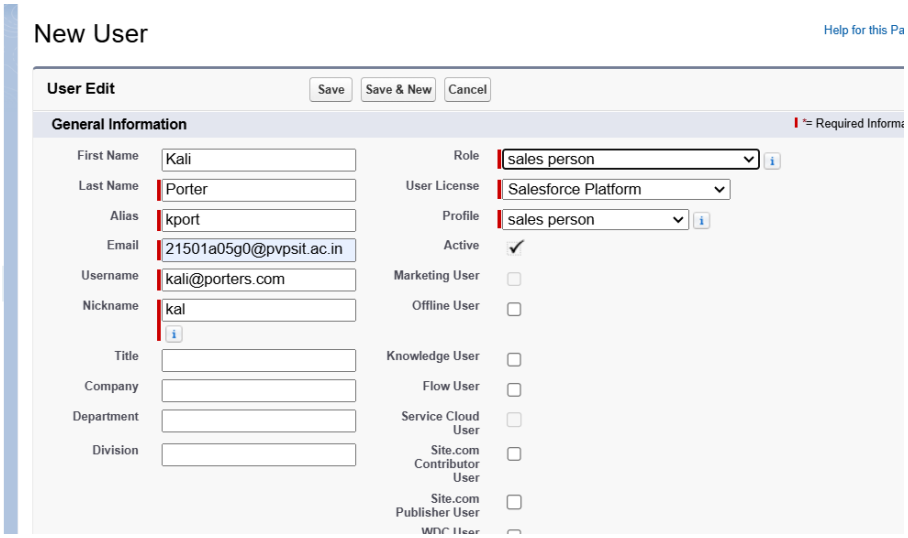
Note : create at least three users with these permissions.

User 1 :

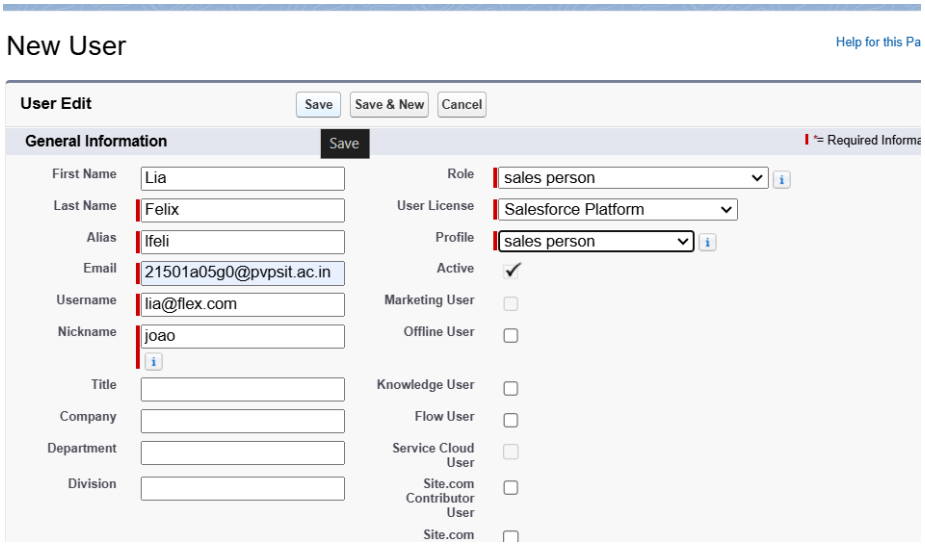
New User



User 2 :



User 3:

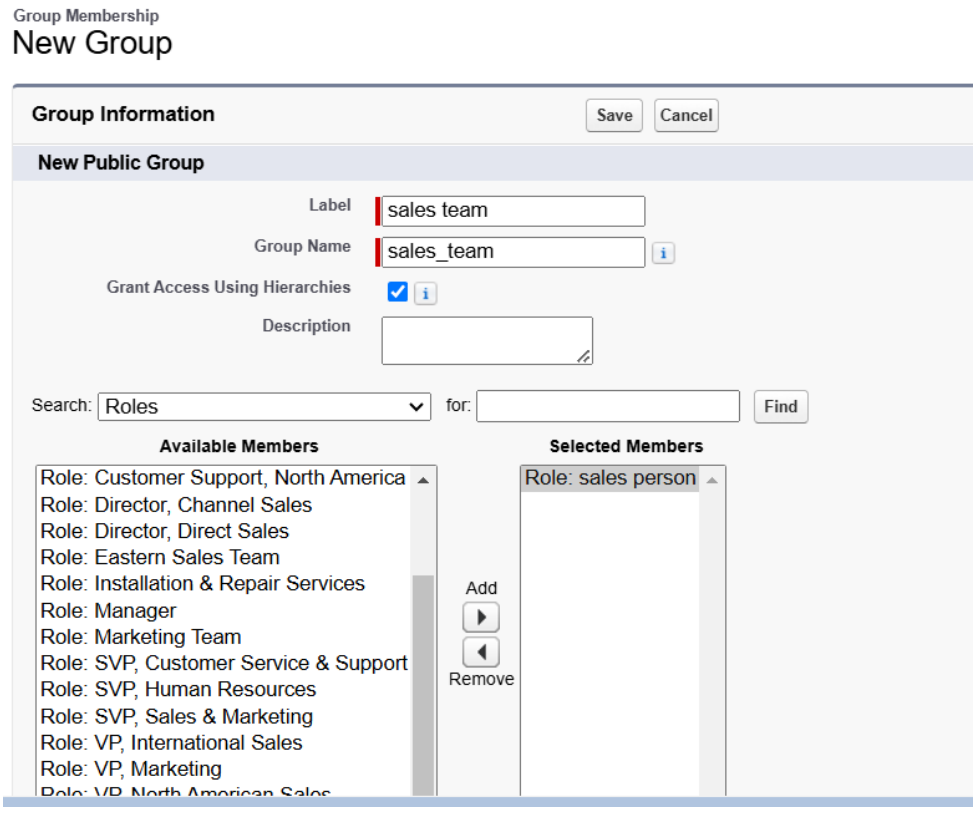


Public groups

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 suitable access to the resources they need.

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 auto filled.
4. Search for Roles.
5. In Available Members, select Sales person and click on add; it will be moved to the selected member.
6. Click on save.



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 surety and privacy. Salesforce provides a mixture of tools and mechanisms to define and enforce sharing rules, such as:

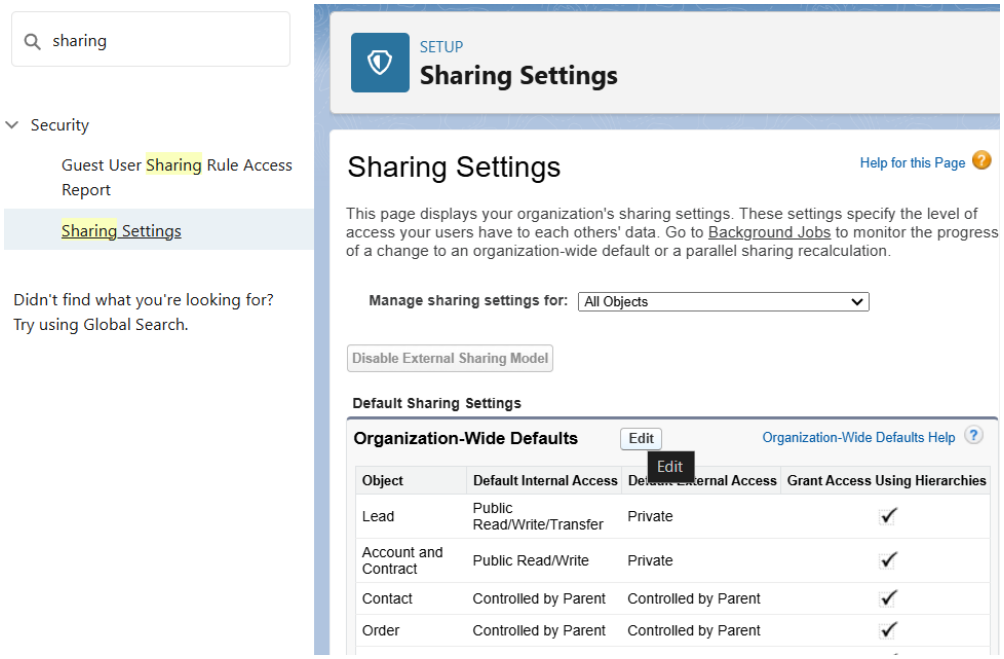
Organization-Wide Default (OWD) Settings:
These settings define the default level of access for all objects within your Salesforce org. OWD settings include Private, Public Read-Only, Public Read/Write, and Controlled by Parent. OWD settings can be configured for each standard and custom object.

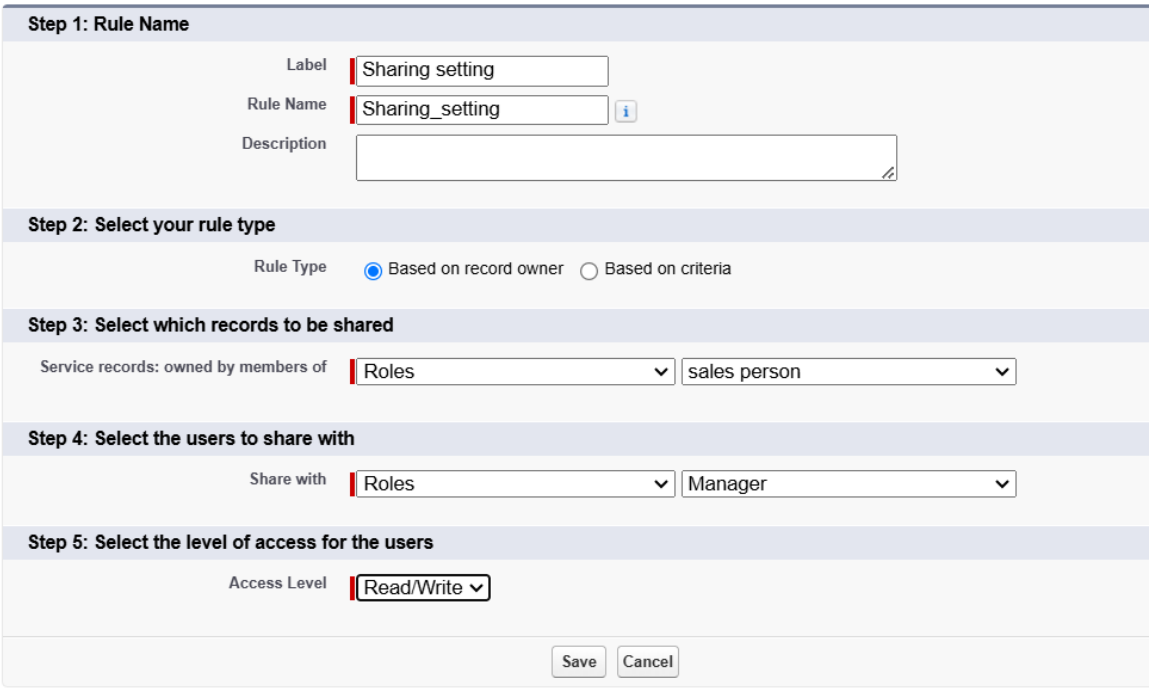
Role Hierarchy:
Salesforce uses a role hierarchy to determine record access.
Users at higher levels in the hierarchy have greater access to records owned by or shared with users lower in the hierarchy.
The role hierarchy is often used in combining with OWD settings to grant different levels of access.

Profiles and Permission Sets:
Profiles and permission sets allow administrators to specify object-level and field-level permissions for users.
Profiles are used to grant general object and field access, while permission sets can be used to extend those permissions to specific users.

Creating Sharing settings

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

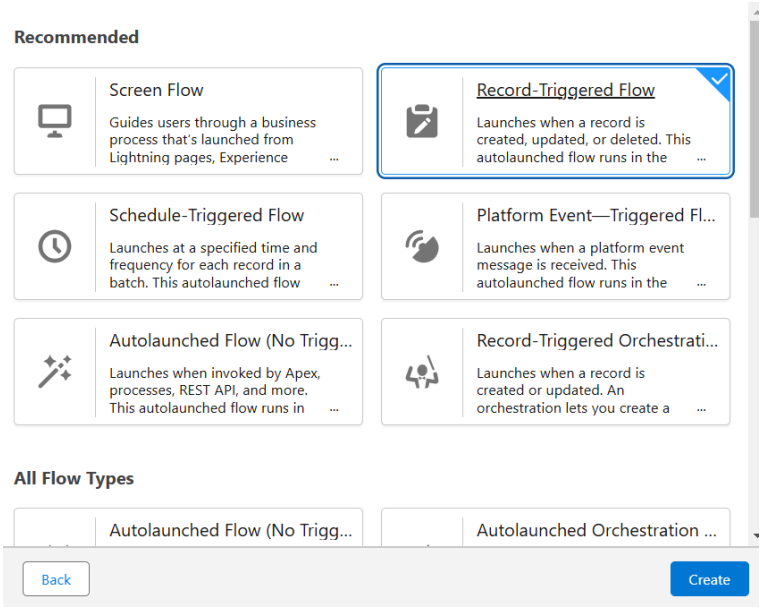

sharing
Security
Guest User Sharing Rule Access Report
Sharing Settings
Didn't find what you're looking for?
Try using Global Search.
SETUP
Sharing Settings
Sharing Settings
Help for this Page
This page displays your organization's sharing settings. These settings specify the level of access your users have to each others' data. Go to Background Jobs to monitor the progress of a change to an organization-wide default or a parallel sharing recalculation.
Manage sharing settings for: All Objects
Disable External Sharing Model
Default Sharing Settings
Organization-Wide Defaults
Edit
Edit
Organization-Wide Defaults Help
Object
Default Internal Access
Grant Access Using Hierarchies
Lead
Public Read/Write/Transfer
Private
Account and Contract
Public Read/Write
Private
Contact
Controlled by Parent
Controlled by Parent
Order
Controlled by Parent
Controlled by Parent


Step 1: Rule Name
Label
Sharing setting
Rule Name
Sharing_setting
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

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 the “+” Symbol, and In the Drop-down List, select the “Update records Element”.Give the Label Name : Amount Update
7. Api name : is auto filled.
8. Set a filter condition : All Conditions are met(AND)
9. Field : Payment_Status_c
10. Operator : Equals
11. Value : Completed
12. Also, Set Field Values for the Billing details and feedback Record
13. Field : Payment_Paid_c
14. Value : {!$Record.Service_records_r.Appointment__r.Service_Amount__c}
15. Click On Done.Before creating another Element. Create a New Resource form Toolbox form top left.
16. Click on the New Resource, And select Variable.
17. Select the resource type as text template.

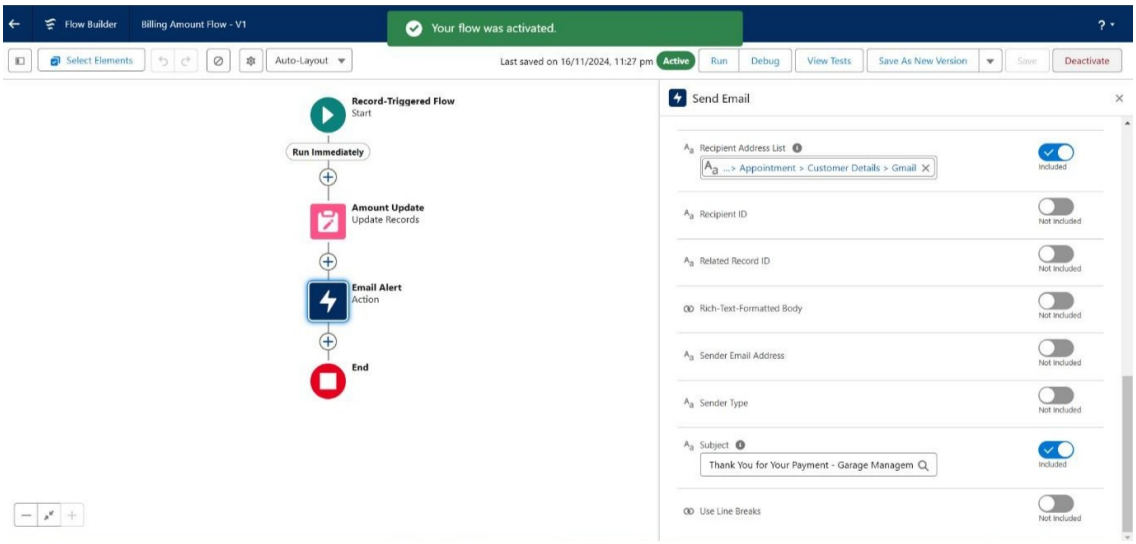
18. Enter the API name as “ alert”.
19. Change the view to Rich Text? View to Plain Text.
20. In body field paste the syntax that given below.

Dear {!$Record.Service_records_r.Appointment__r.Customer_Details__r.Name},

I hope this message finds you well. I wanted to take a moment to express my sincere gratitude for your recent payment for the services provided by our garage management team. Your prompt payment is greatly satisfying, 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 filled.
28. Enable the body to 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_Details__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. The Flow Api name will be auto-filled.
35. Also, click save, and click on activate.



Apex Trigger

Apex can be invoked by using triggers. Apex triggers enable you to perform custom actions before or after changes to Salesforce records, such as insertions, updates, or deletions.
A trigger is Apex code that executes before or after the following types of operations:

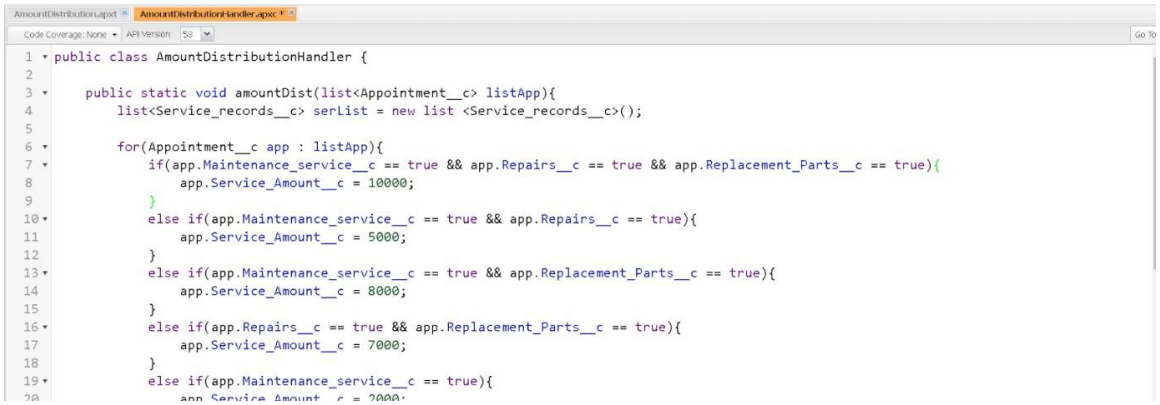
- insert
- update
- delete
- merge
- upsert
- undelete

For example, you can have a trigger run before an object's records are inserted into the database, after records have been deleted, or even after a record is restored from the Recycle Bin.
You can define triggers for top-level standard objects that support triggers, such as a Contact or an Account, some standard child objects, such as a CaseComment, and custom objects. To define a trigger, from the object management settings for the object whose triggers you want to access, go to Triggers.
There are two types of Apex Triggers:
Before Trigger: This type of trigger in Salesforce is used either to update or validate the values of a record before they can be saved into the database. So, the before trigger validates the record first and then saves it. Some standard or code can be set to check data before it gets ready to be inserted into the database.
After Trigger: This type of trigger in Salesforce is used to access the field values set by the system and affect any change in the record. In other words, the after trigger makes changes to the value from the data inserted in some other record.

Apex handler

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

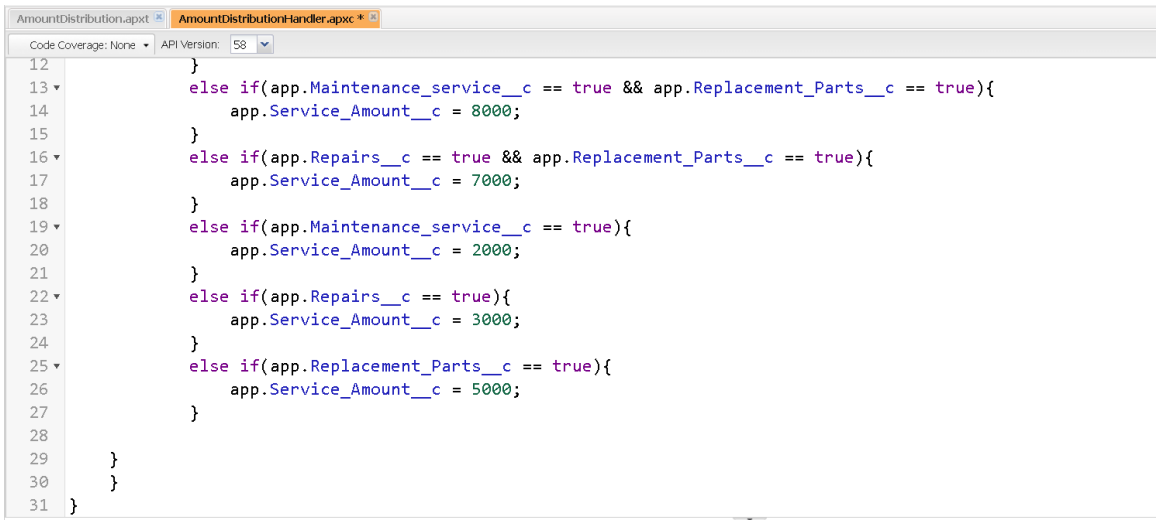
1. Login to the respective trailhead account and navigate to the gear icon in the top right corner.
2. Click on the Developer console. Now you will see a new console window.
3. In the toolbar, you can see FILE. Click on it and navigate to new and create a New apex class.
4. Name the class as “AmountDistributionHandler ”.



```
public class AmountDistributionHandler {

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

        for(Appointment__c app : listApp){
            if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){
                app.Service_Amount__c = 10000;
            }
            else if(app.Maintenance_service__c == true && app.Repairs__c == true){
                app.Service_Amount__c = 5000;
            }
            else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
                app.Service_Amount__c = 8000;
            }
            else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
                app.Service_Amount__c = 7000;
            }
            else if(app.Maintenance_service__c == true){
```



```
            }
            else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
                app.Service_Amount__c = 8000;
            }
            else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
                app.Service_Amount__c = 7000;
            }
            else if(app.Maintenance_service__c == true){
                app.Service_Amount__c = 2000;
            }
            else if(app.Repairs__c == true){
                app.Service_Amount__c = 3000;
            }
            else if(app.Replacement_Parts__c == true){
                app.Service_Amount__c = 5000;
            }

    }
    }
}
```

Code:

```
public class AmountDistributionHandler {
public static void amountDist(list<Appointment_c> listApp){
   list<Service_records_c> serList = new list
   <Service_records_c>(); for(Appointment_c app : listApp){
        if(app.Maintenance_service_c == true && app.Repairs_c == true &&
app.Replacement_Parts_c == true){
            app.Service_Amount_c = 10000;
        }
      else if(app.Maintenance_service_c == true && app.Repairs_c == true){
        app.Service_Amount_c = 5000;
        }
      else if(app.Maintenance_service_c == true && app.Replacement_Parts_c ==
        true){ app.Service_Amount_c = 8000;
        }
```

```
        else if(app.Repairs_c == true && app.Replacement_Parts_c == true){
            app.Service_Amount_c = 7000;
            }
        else if(app.Maintenance_service_c == true){
            app.Service_Amount_c = 2000;
            }
        else if(app.Repairs_c == true){
            app.Service_Amount__c = 3000;
            }
        else if(app.Replacement_Parts_c == true){
            app.Service_Amount_c = 5000;
            }
    }
    }
}
```

Trigger Handler :

How to create a new trigger :

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

Syntax For creating trigger :

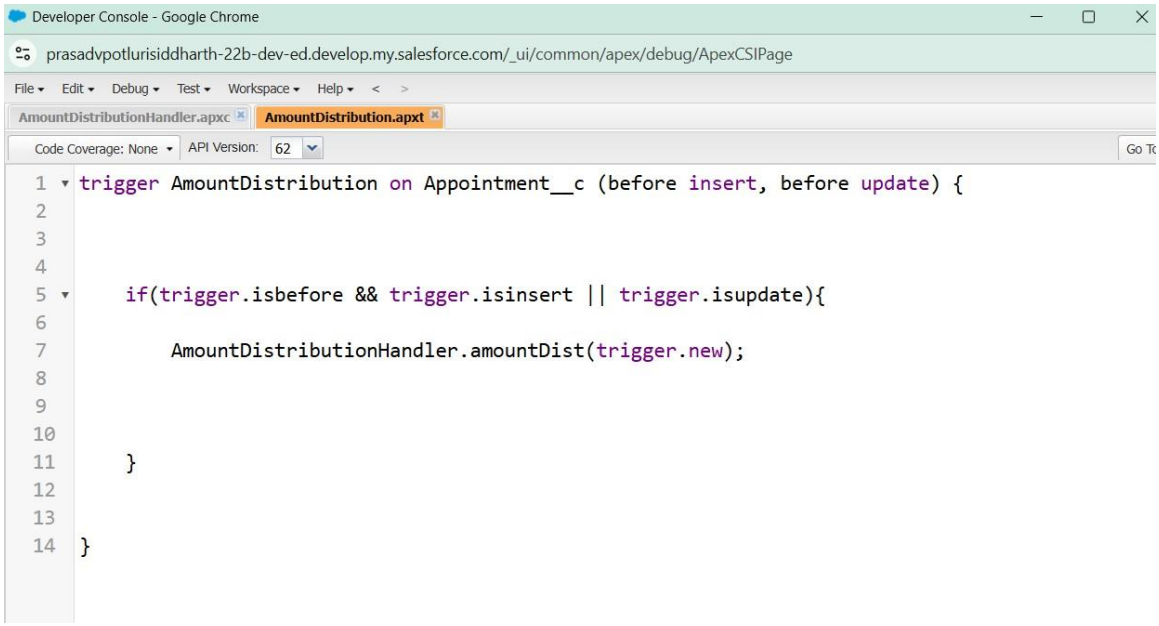
The syntax for creating trigger is :

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

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

Code:

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



Reports

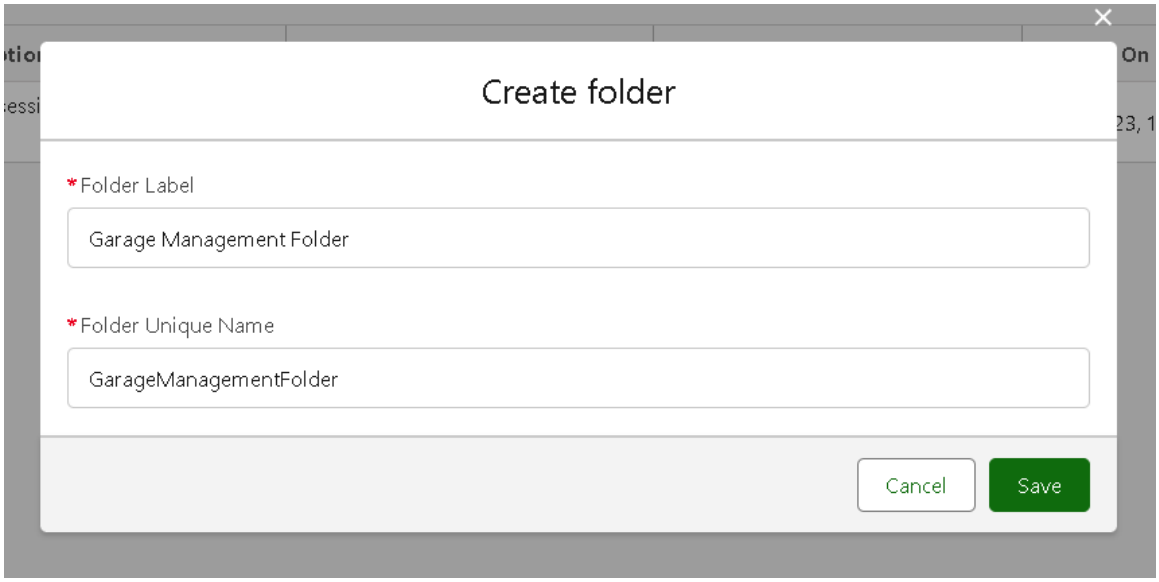
Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combining, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

Types of Reports in Salesforce

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

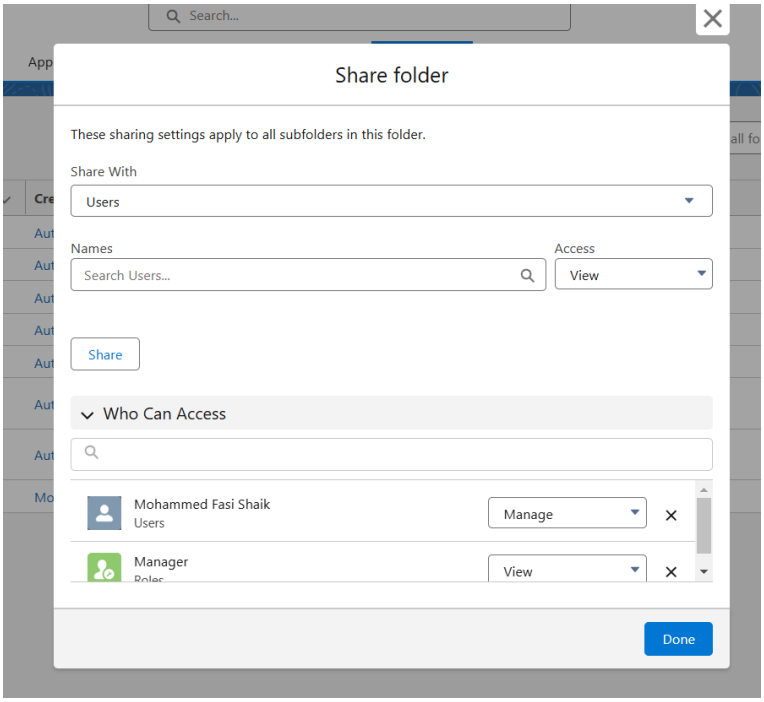
Create a report folder

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



Sharing a report folder

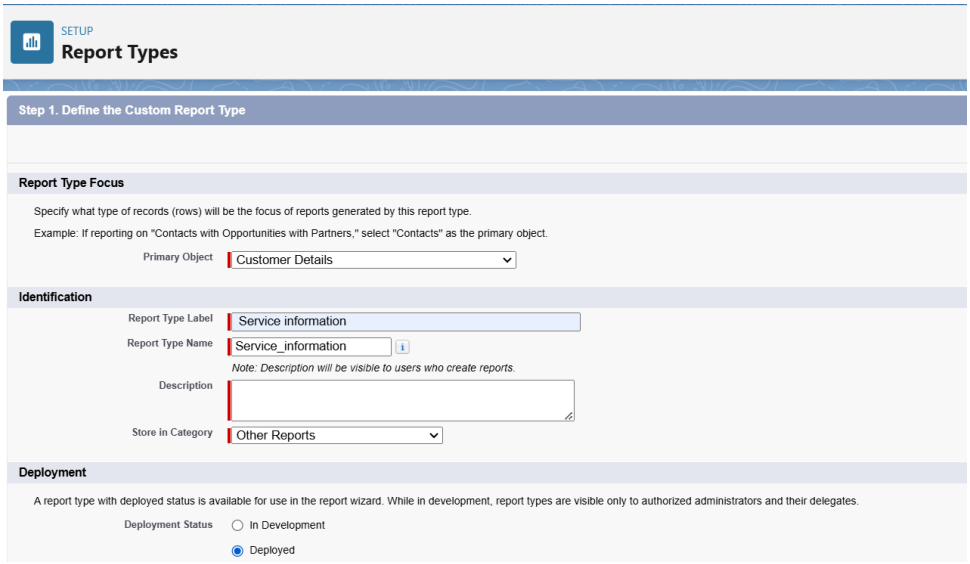
1. Go to the app >> click on the reports tab.
2. Click on the All folder, click on the drop-down menu arrow for the Garage Management folder, and Click on share.
3. Select the share with as “roles”, in name field search for “manager”, give “view” as access for that role.
4. Then click share, and click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



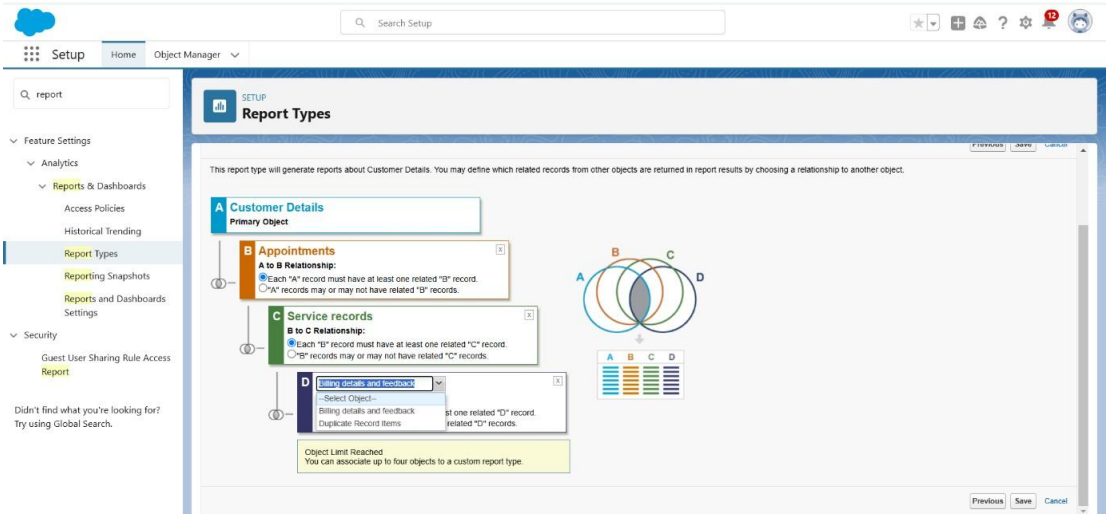
Create Report Type

1. Go to setup >> type Report Type in quick find box and click on it >> click on Continue.
2. Click on a new custom report type.
3. Select the Primary object as “ Customer details”.
4. Give the Report type Label as “ Service information ”
5. Report type Name is auto filled.

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



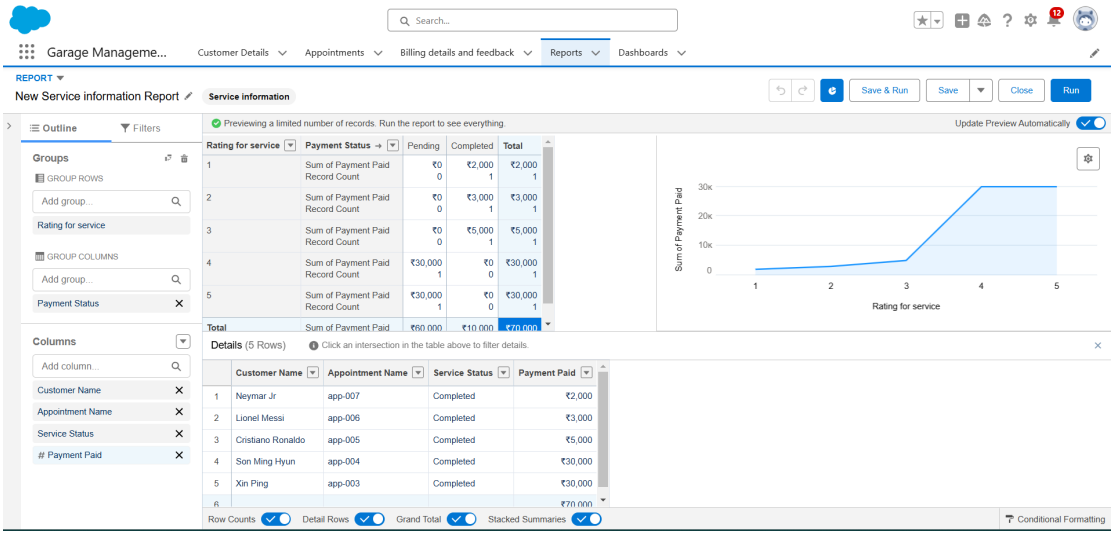
9. now , Click on Related object box.
10. Click on Select Object, choose Appointment Object as shown in fig
11. Again, Click to relate another object.
12. Also, select the related object as “service records”.
13. Repeat the process and select the related object as “ Billing details and feedback”.
14. Also, click on save.



Create Report

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

1. Go to the app >> click on the reports tab
2. Click New Report.
3. Select the Category as other reports, search for Service Information, select that report, click on it. And click on start report.
4. Their outline pane is opened already, select the fields that mentioned below in column section.
    - Customer name.
    - Appointment Date.
    - Service Status.
    - Payment paid.
5. Remove other fields.
6. Select the fields that mentioned below in GROUP ROWS section.
    1. Rating for Service
7. Select the fields that mentioned below in GROUP ROWS section.
    2. Payment Status
8. Click on Add Chart, Select the Line Chart.
9. Click on save, Give the report Name : New Service information Report
10. Report unique Name is auto filled.
11. Select the folder the created and Click on save.

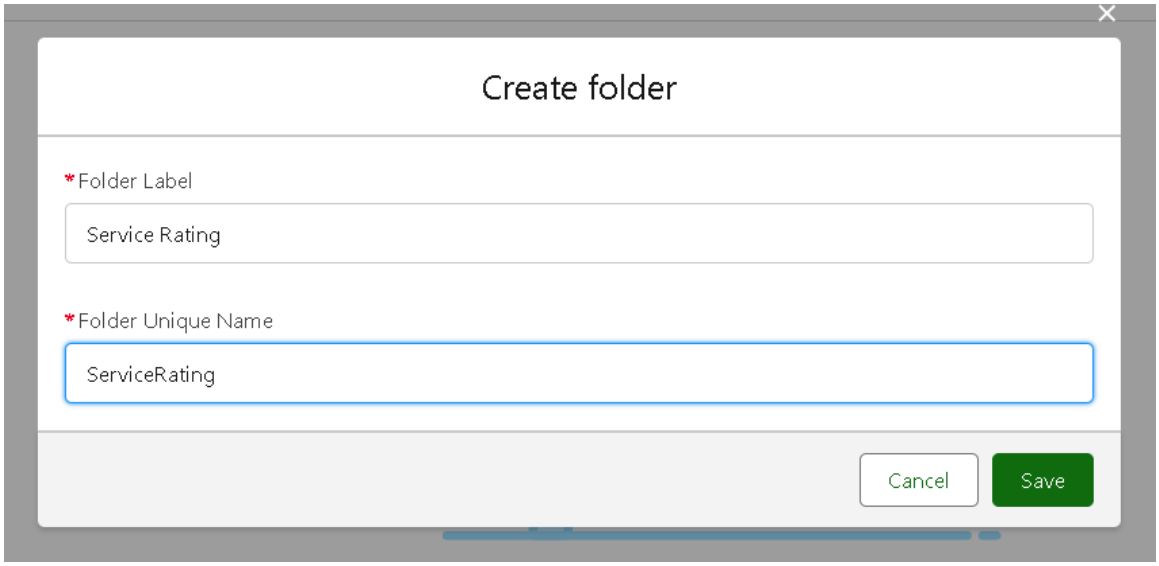


Dashboards

Dashboards help you understand changing business conditions so you can make decisions based on the real-time data you have gathered with reports. Use dashboards to help users discover trends, resolve quantities, and measure the impact of their action. Before building, reading, and sharing dashboards, review these dashboard basics.

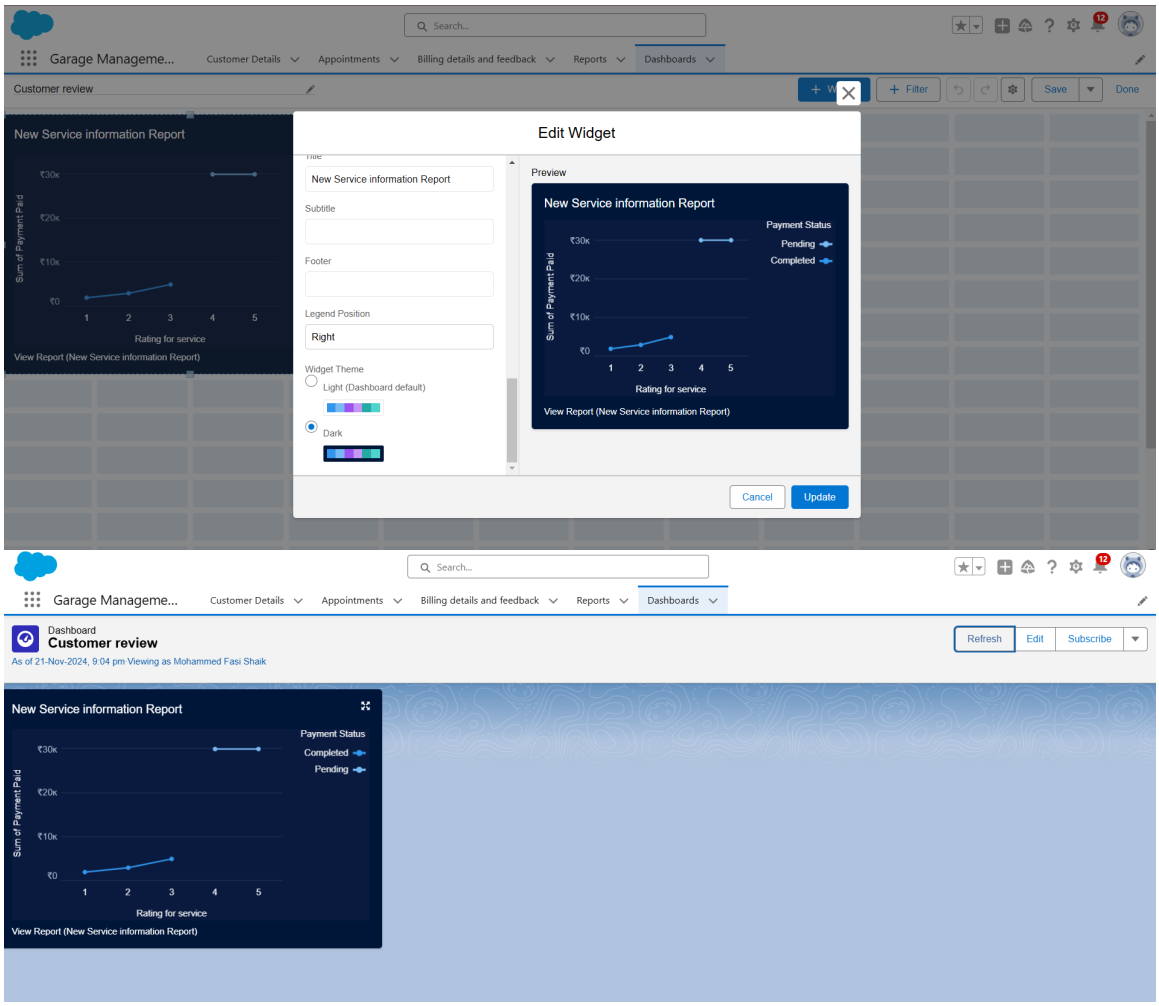
Create Dashboard Folder

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



Create Dashboard

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



Subscription:

1. After that, Click on Subscribe on the top right.
2. Set the Frequency as “ weekly ”.
3. Set a day as Monday.
4. Also, Click on save.