

TITLE: GARAGE MANAGEMENT SYSTEM

CATEGORY : Salesforce Developer

SKILLS REQUIRED : Salesforce Admin, Salesforce Developer

PROJECT DESCRIPTION :

The Garage Management System is a comprehensive software solution designed to streamline and manage the daily operations of a vehicle garage or service center. The system aims to provide an efficient and user-friendly platform to handle vehicle service records, customer details, mechanic assignments, spare parts inventory, and billing processes. It ensures accurate tracking of services performed, simplifies job scheduling, and enhances overall workflow management — ultimately improving customer satisfaction and operational efficiency.

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TEAM LEADER :

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INSTITUTION : IMAYAM COLLEGE OF ENGINEERING

Phase 1: Ideation

1. Problem Statement:

Automotive garages often face challenges in managing customer records, vehicle service history, spare parts inventory, and billing. Traditional systems are fragmented, leading to inefficiencies and poor customer experience.

2. Proposed Solution

Develop a Salesforce-based CRM tailored for garage management. The system will centralize customer and vehicle data, automate service tracking, manage inventory, and provide real-time analytics.

3. Objectives

- Centralize customer, vehicle, and service data.
- Automate service tracking and inventory updates using Flows and Triggers.
- Provide a 360° view of customer and vehicle history.
- Enable data-driven decisions via Reports and Dashboards.
- Improve user experience with Lightning UI and Page Layouts.
- Implement role-based access for secure collaboration.

4. Key Features / Functionalities

A. Salesforce Setup & Configuration

- Developer Account setup
- Custom Objects: Customer, Vehicle, Service Record, Spare Part, Invoice
- Tabs for navigation
- Lightning App: "Garage CRM"

B. Data Structure & UI Design

- Custom Fields: vehicle type, service type, part number, warranty status
- Page Layouts and Record Types for different service categories
- Validation Rules for accurate data entry

C. Security & Access Management

- Profiles and Roles for Admin, Mechanic, and Front Desk
- Permission Sets for controlled access

D. Business Logic & Automation

- Triggers for inventory updates and service reminders
- Flows for customer onboarding and service scheduling

E. Analytics & User Adoption

- Reports: service trends, customer retention, part usage
- Dashboards: revenue, top services, frequent customers
- User Adoption tracking

5. Expected Outcomes

- Enhanced customer service and retention
- Streamlined garage operations
- Real-time insights for business growth
- Secure and scalable system
- Reduced manual errors
- Improved user experience

Phase 2 : Requirement Analysis

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.

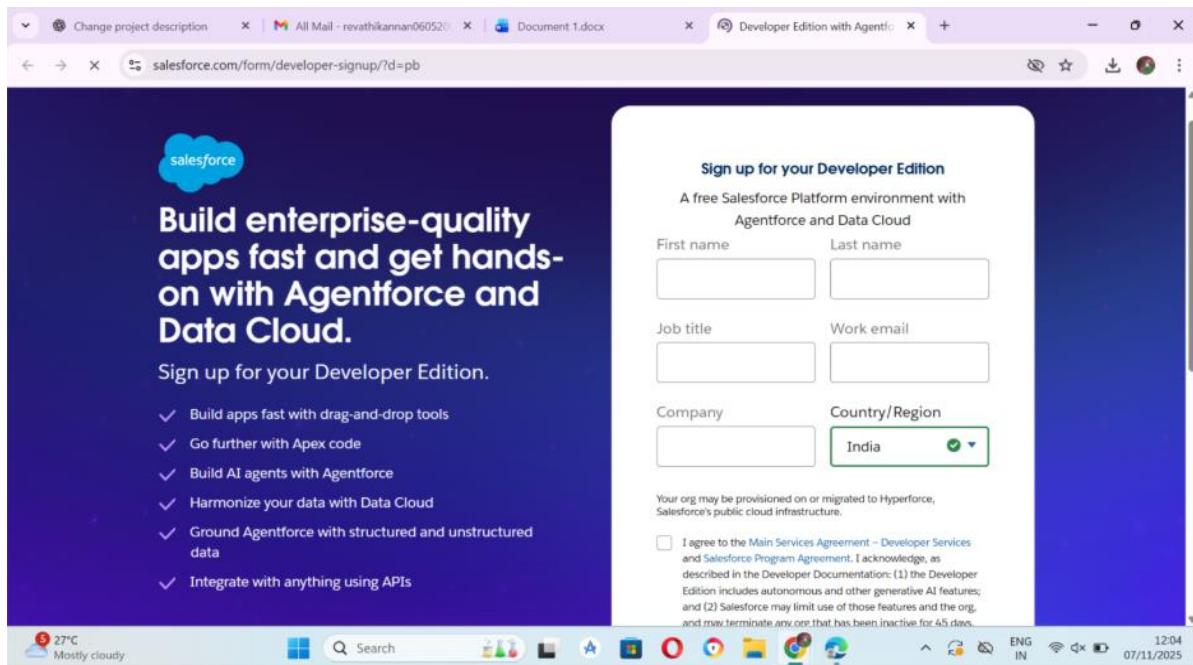
So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<https://youtu.be/r9EX3IGde5k>

Activity 1: Creating Developer Account:

Creating a developer org in salesforce.

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



1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name

5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

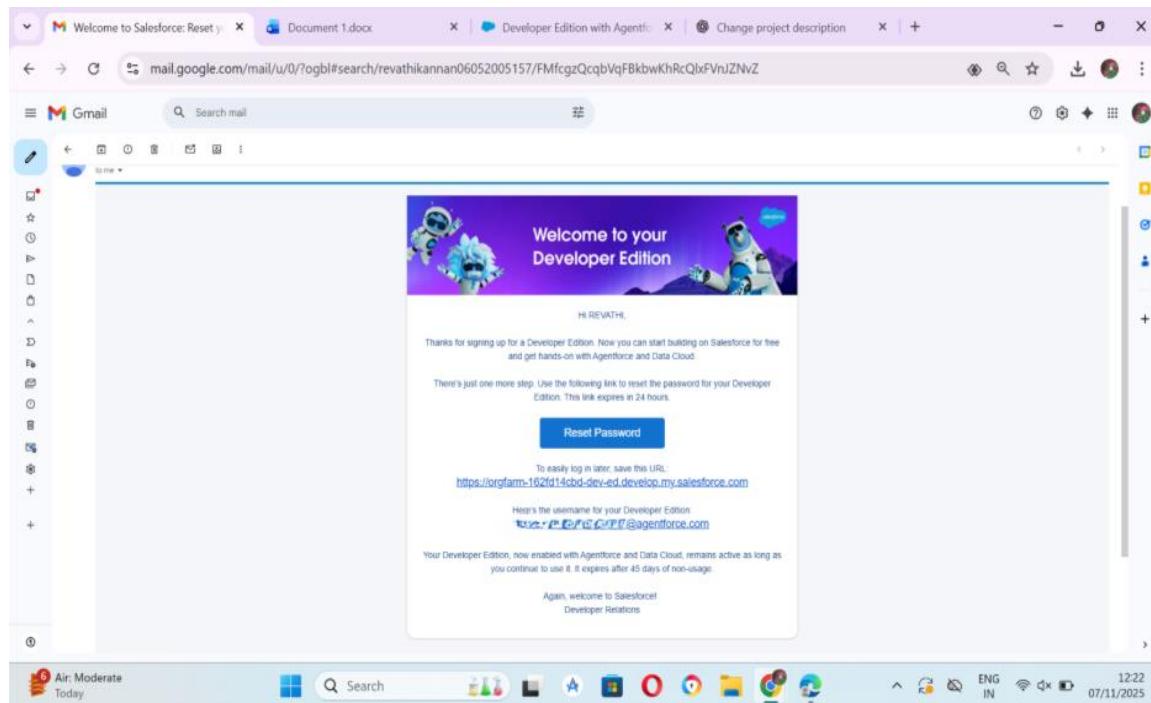
This need not be an actual email id, you can give anything in the format :

username@organization.com

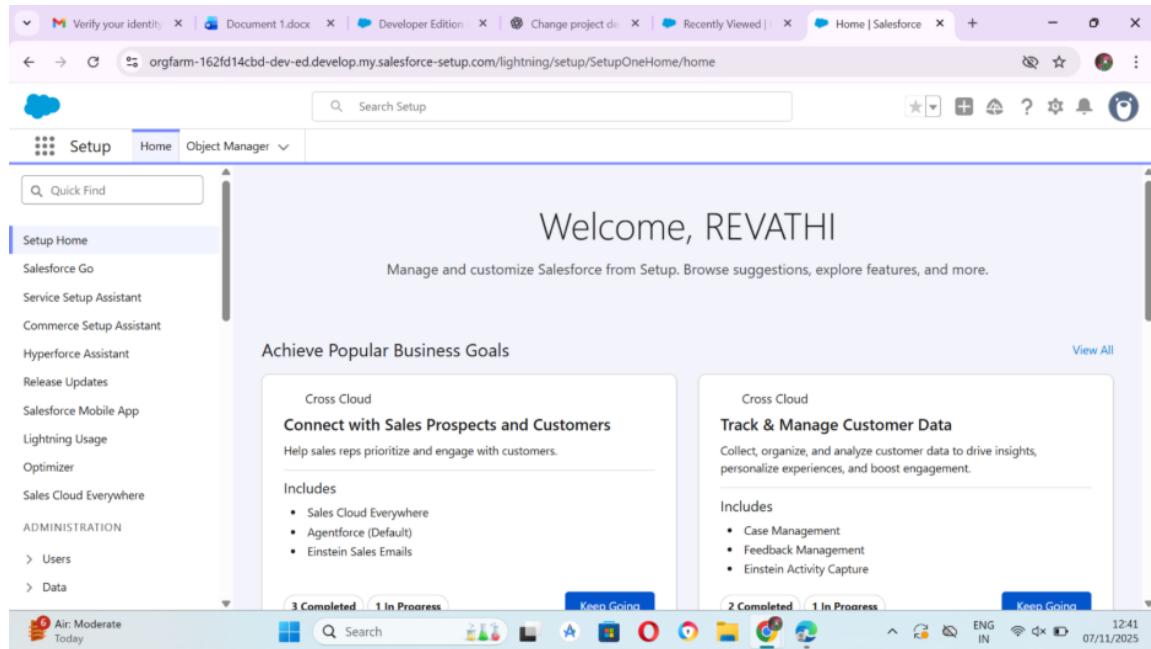
Click on sign me up after filling these.

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



Milestone 2: 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.
- To Navigate to Setup page:
Click on gear icon ? click setup.

The screenshot shows the Salesforce Setup Home page. At the top, there are three tabs: 'Document 1.docx', 'Home | Salesforce', and 'Recently Viewed | Customer De...'. Below the tabs, the main header includes a cloud icon, a search bar labeled 'Search Setup', and a 'Setup' tab. To the right of the search bar is a 'Setup Menu' button. The central area features a welcome message 'Welcome, REVATHI' and a banner 'Achieve Popular Business Goals'. On the left, a sidebar lists links like 'Setup Home', 'Salesforce Go', 'Service Setup Assistant', 'Commerce Setup Assistant', and 'Hyperforce Assistant'. On the right, a sidebar titled 'Setup' lists 'Data Cloud Setup', 'Service Setup', 'Salesforce Go', and 'Developer Console', with a 'View All' link at the bottom.

To create an object:

3. From the setup page ? Click on Object Manager ? Click on Create ? Click on Custom Object.

The screenshot shows the Salesforce Object Manager page. The top navigation bar includes 'Document 1.docx', 'Object Manager | Salesforce', and 'Recently Viewed | Customer De...'. The main content area is titled 'Object Manager' and shows a table with one item: 'Account'. The table columns are 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', and 'LAST MODIFIED'. A 'Create' button is visible above the table, with a dropdown menu showing 'Custom Object' and 'Custom Object from Spreadsheet'. The status bar at the bottom indicates '53+ Items, Sorted by Label'.

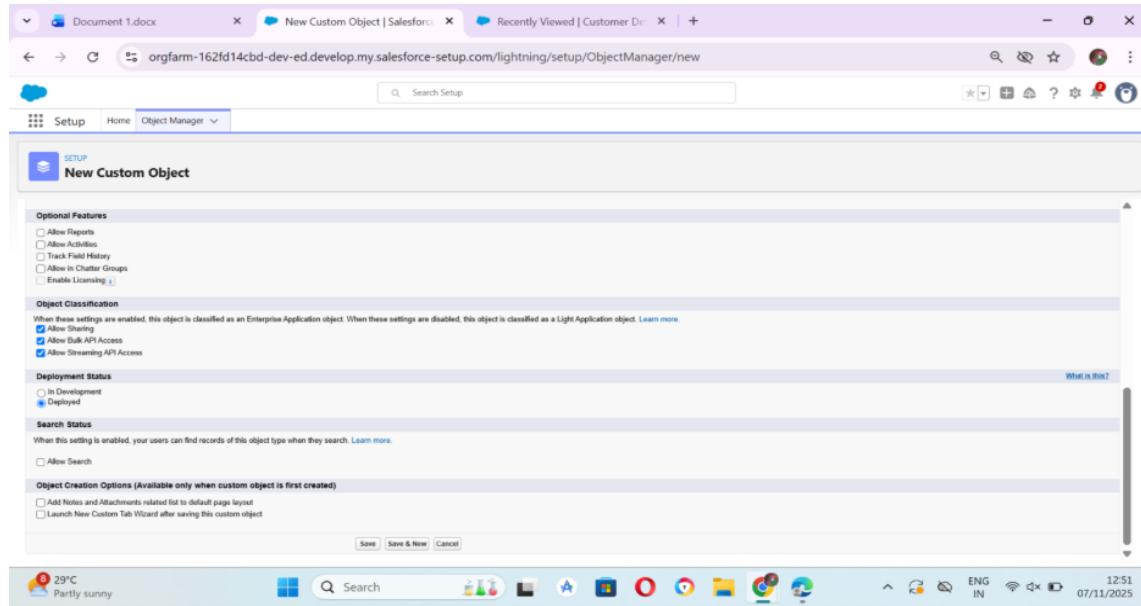
4. On Custom object defining page:

5. Enter the label name, plural label name, click on Allow reports, Allow search.

The screenshot shows the 'New Custom Object' page in the Salesforce Setup. The title bar says 'New Custom Object | Salesforce'. The main form is titled 'Custom Object Definition Edit' and contains several sections:

- Custom Object Information**: Fields for 'Label' (e.g., 'Account') and 'Plural Label' (e.g., 'Accounts'). A note says 'The singular and plural labels are used in tabs, page layouts, and reports.'
- Object Name**: Fields for 'Object Name' (e.g., 'Account') and 'Description' (a large text input field).
- Context-Sensitive Help Setting**: Radio buttons for 'Open the standard Salesforce.com Help & Training window' (selected) and 'Open a window using a Visualforce page'.
- Enter Record Name Label and Format**: Fields for 'Record Name' (e.g., 'Account Name') and 'Example' (e.g., 'Account Name'). A note says 'The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record Name field is always called "Name" when referenced via the API.'
- Data Type**: A dropdown set to 'Text'.

The status bar at the bottom shows weather information ('29°C Partly sunny'), system icons, and the date/time ('07/11/2025 12:51 ENG IN').

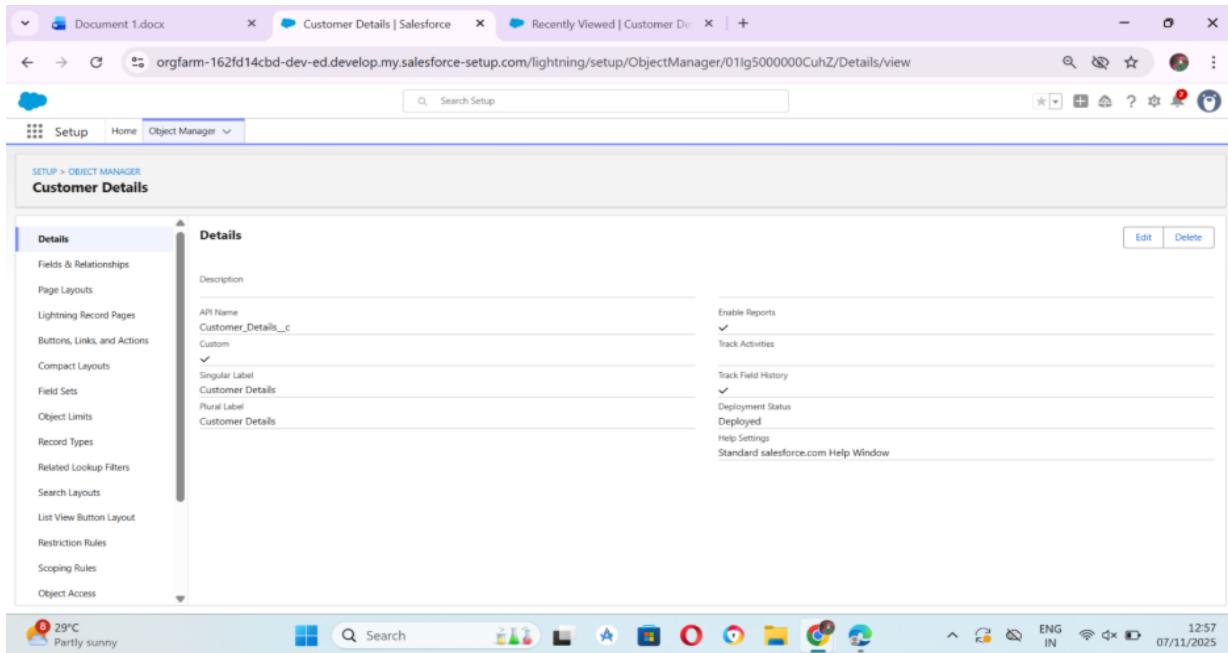


6. Click on Save.

Activity 1: Create Customer DetailsObject

To create an object:

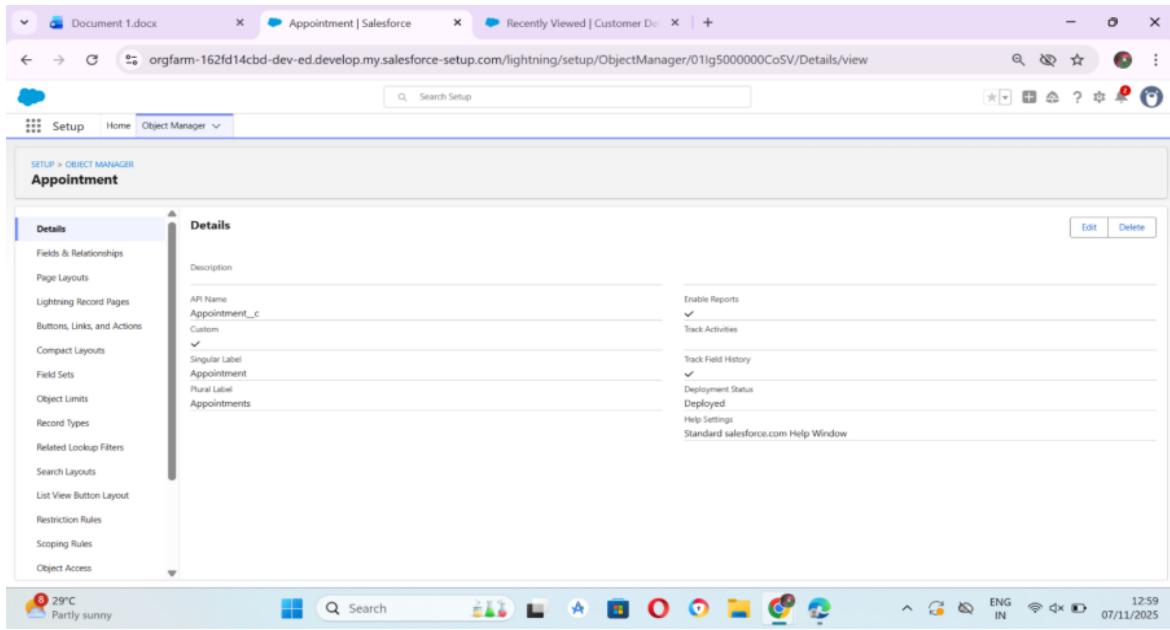
1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
1. Enter the label name >> Customer Details
2. Plural label name >> Customer Details
3. Enter Record Name Label and Format
 - Record Name >> Customer Name
 - Data Type >> Text
2. Click on Allow reports and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



Activity 2: Create Appointment Object

To create an object:

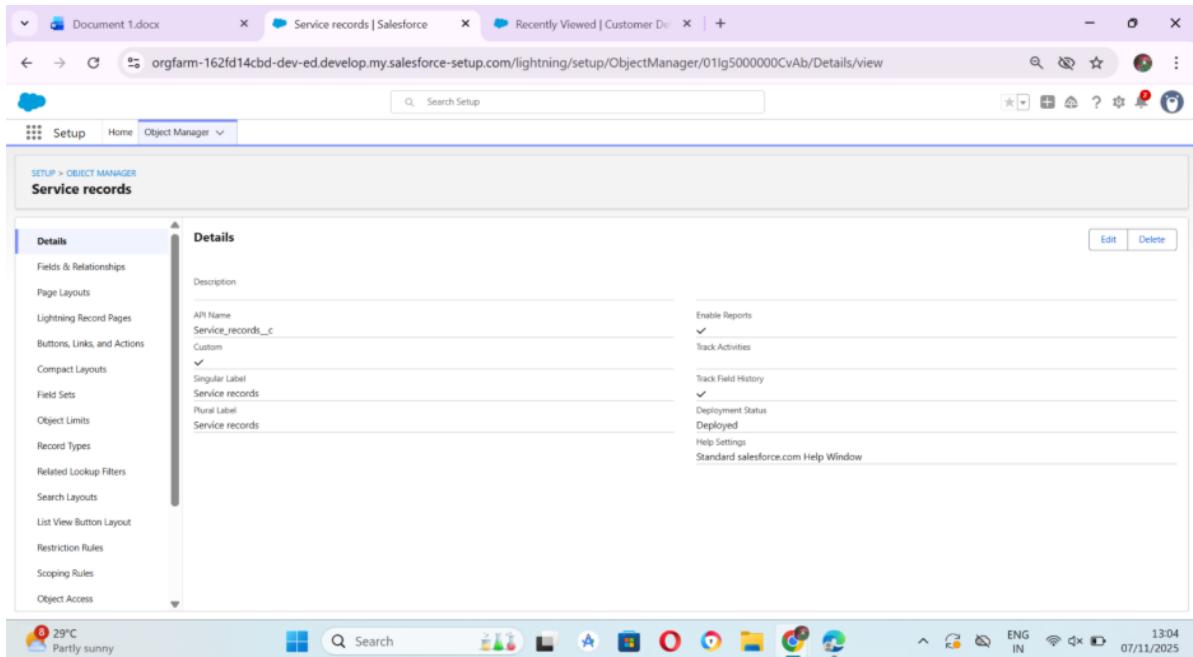
1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
1. Enter the label name >> Appointment
2. Plural label name >> Appointments
3. Enter Record Name Label and Format
 - Record Name >> Appointment Name
 - Data Type >> Auto Number
 - Display Format >> app-{000}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



Activity 3: Create Service records Object

To create an object:

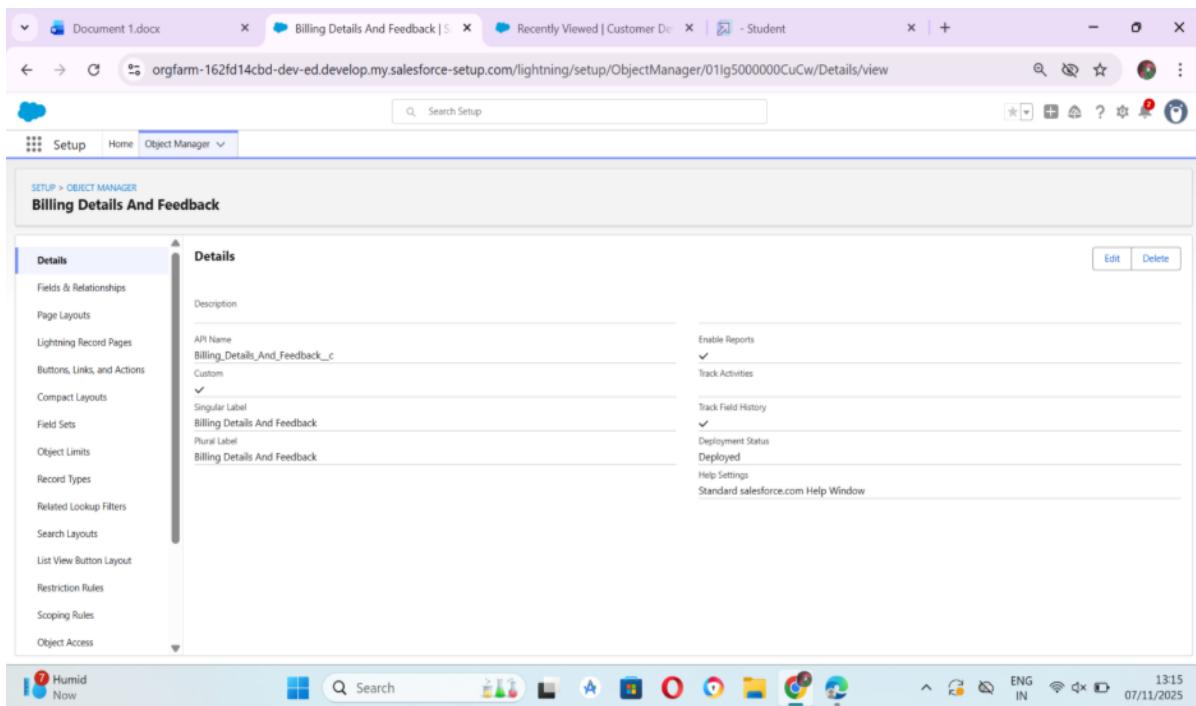
1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
1. Enter the label name >> Service records
2. Plural label name >> Service records
3. Enter Record Name Label and Format
 - Record Name >>Service records Name
 - Data Type >> Auto Number
 - Display Format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



Activity 3: 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.



Phase 3: Project Design

Milestone 1: 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 quickly access content and applications they frequently use without leaving the salesforce.com application.

3. Visualforce Tabs

Visualforce Tabs are custom tabs that display a Visualforce page. Visualforce 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

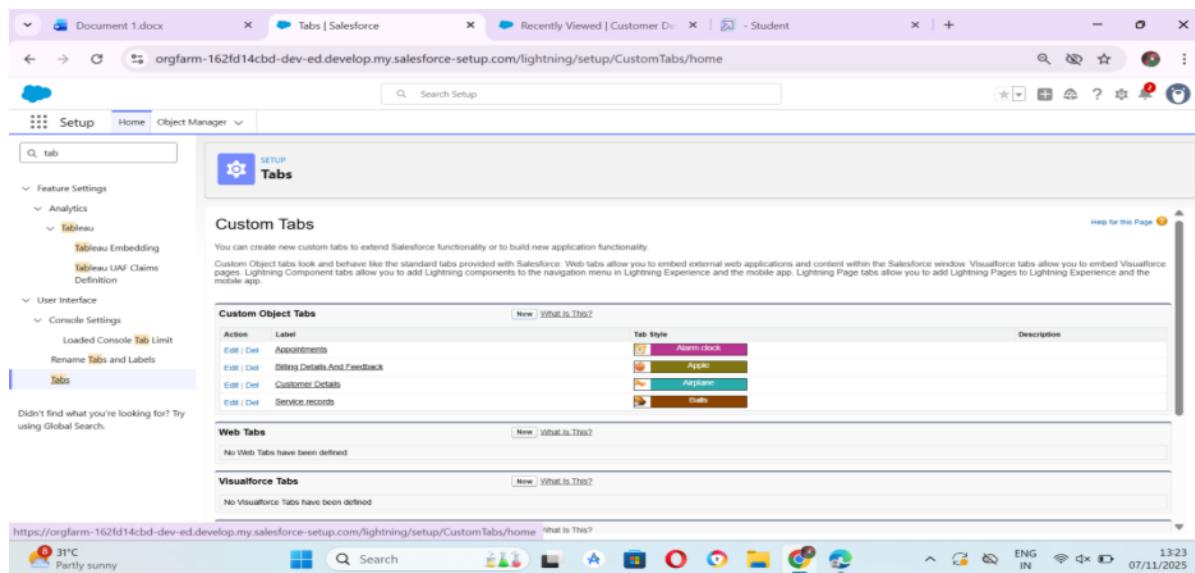
Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu.

Lightning Page tabs don't work like other custom tabs. Once created, they don't 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 don't show up in the Available Tabs list when you customise the tabs for your apps.

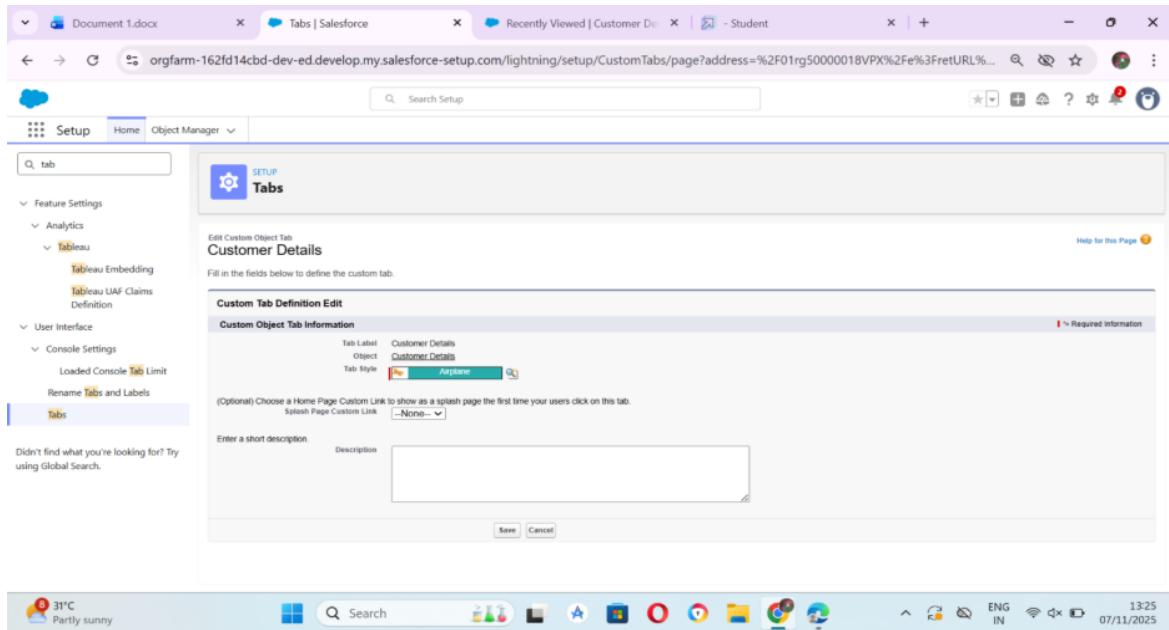
Activity 1: Creating a Custom Tab

To create a Tab:(Customer Details)

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

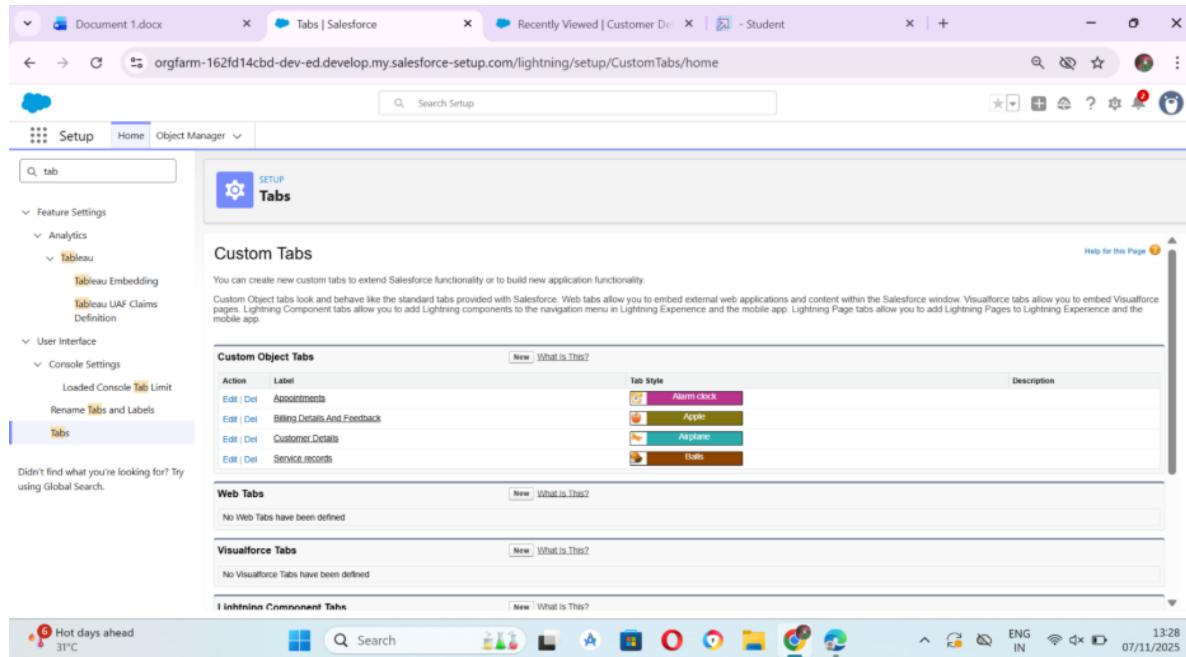


2. Select Object(Customer Details) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .
3. Make sure that the Append tab to users' existing personal customizations is checked.
4. Click save.



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 2: 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 colour 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.

Activity 1: Create a Lightning App

To create a lightning app page:

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

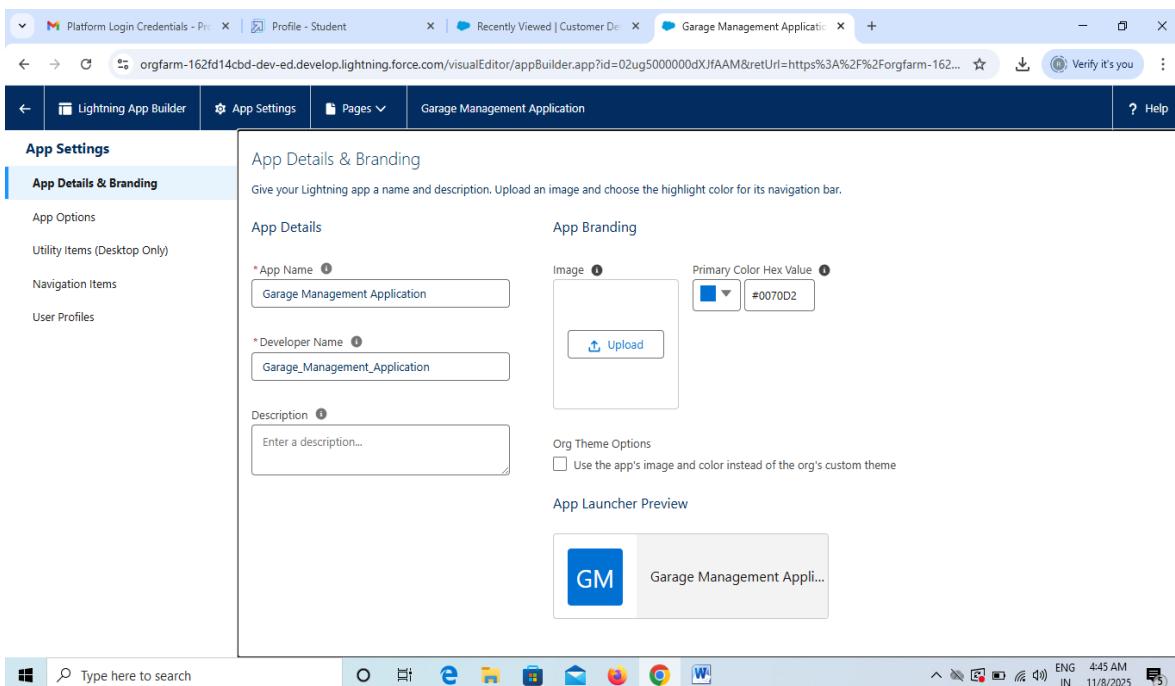
The screenshot shows the Salesforce App Manager interface. The left sidebar has 'App Manager' selected under 'Apps'. The main area displays a table of 28 items, sorted by App Name. The table columns include App Name, Developer Name, Description, Last Modified Date, App Type, and Version. The 'Garage Management Application' is listed as item 13, developed by 'Garage_Management_Application'.

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

The screenshot shows the 'New Lightning App' configuration page. The 'App Details & Branding' section is active. It includes fields for 'App Name' (Name your app...), 'Developer Name' (Enter a developer name...), 'Description' (Enter a description...), and 'Image' (Upload). The 'Primary Color Hex' is set to #007002. A progress bar at the bottom shows the process is at step 1 of 5. The status bar at the bottom indicates 'Rain coming In about 3.5 hours'.

- To Add Navigation Item
- 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 3: 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

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

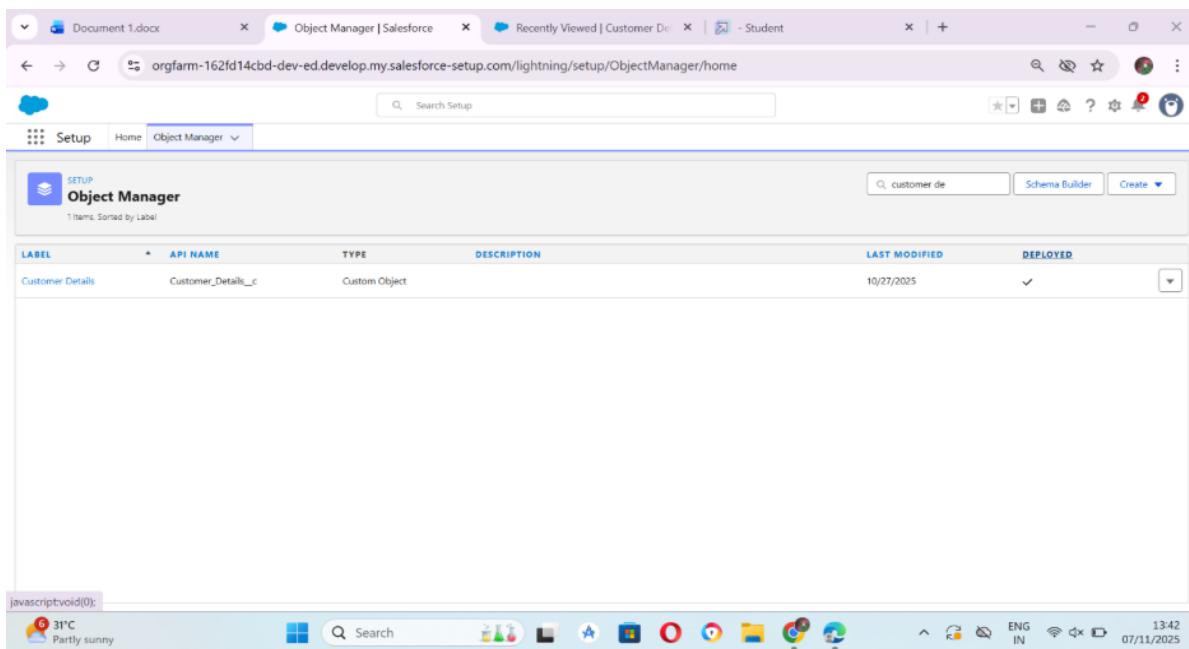
Custom Fields:

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.



The screenshot shows the Salesforce Object Manager interface. The browser title is "Object Manager | Salesforce". The search bar at the top contains "customer de". The main table displays one item: "Customer Details" with API Name "Customer_Details__c" and Type "Custom Object". The table has columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED. The last modified date is 10/27/2025 and the deployed status is checked. The bottom of the screen shows a Windows taskbar with various icons and system status.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Customer Details	Customer_Details__c	Custom Object		10/27/2025	✓

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

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer Name	Name	Text(80)		<input checked="" type="checkbox"/>
Gmail	Gmail_c	Email		<input type="checkbox"/>
Last Modified By	LastModifiedById	Lookup(User)		<input type="checkbox"/>
Owner	OwnerId	Lookup(User,Group)		<input checked="" type="checkbox"/>
Phone number	Phone_number_c	Phone		<input type="checkbox"/>

3. Select Data Type as a “Phone”
4. Click on next.
5. Fill the Above as following:
 - Field Label: Phone number
 - Field Name : gets auto generated
 - Click on Next >> Next >> Save and new.

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

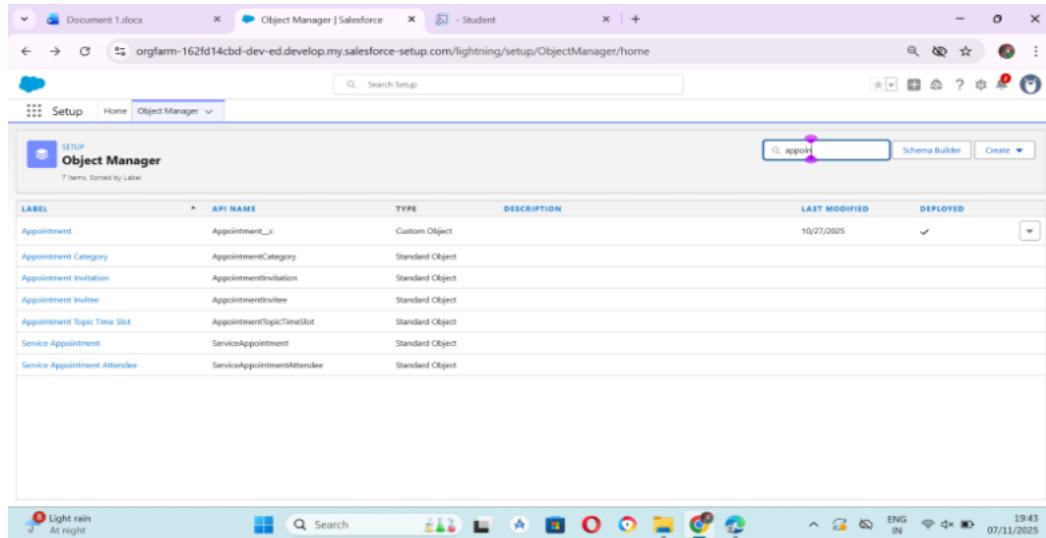
2.To create another fields in an object:

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:
5. Field Label : Gmail
6. Field Name : gets auto generated
7. Click on Next >> Next >> Save and new.

Activity 2: Creation of Lookup Fields

1. Creation of Lookup Field on Appointment Object :

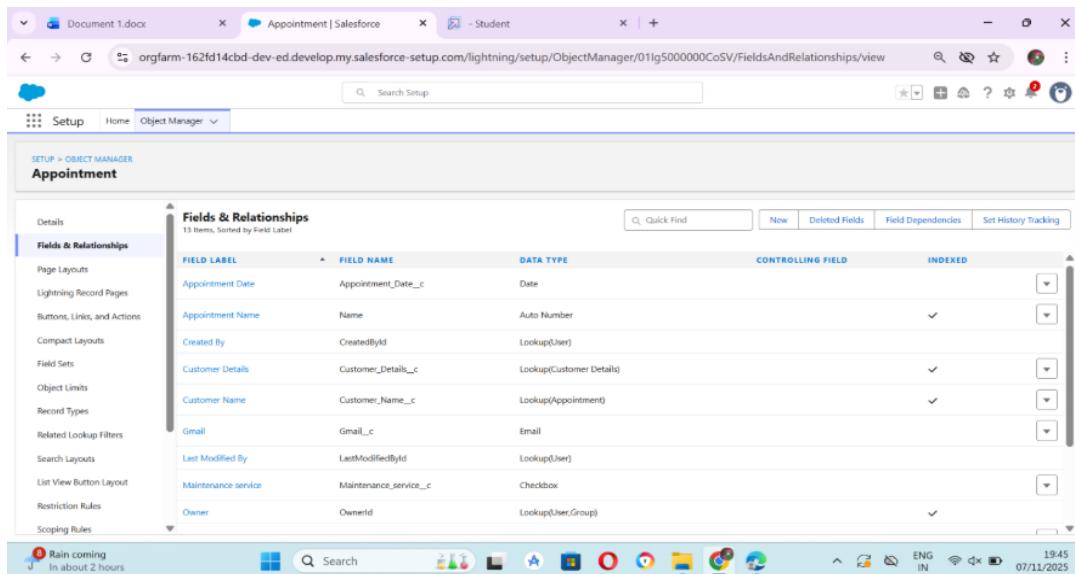
1. Go to setup >> click on Object Manager >> type objectname(Appointment) in the search bar >> click on the object.



The screenshot shows the Salesforce Object Manager interface. The search bar at the top contains the text "appoint". A table below lists various objects, with "Appointment" highlighted. The columns include Label, API Name, Type, Description, Last Modified, and Deployed. The "Appointment" row shows "Appointment_c" as the API name, "Custom Object" as the type, and "10/27/2005" as the last modified date.

Label	API Name	Type	Description	Last Modified	Deployed
Appointment	Appointment_c	Custom Object		10/27/2005	✓
Appointment Category	AppointmentCategory	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			
Appointment Topic Time Slot	AppointmentTopicTimeSlot	Standard Object			
Service Appointment	ServiceAppointment	Standard Object			
Service Appointment Attendee	ServiceAppointmentAttendee	Standard Object			

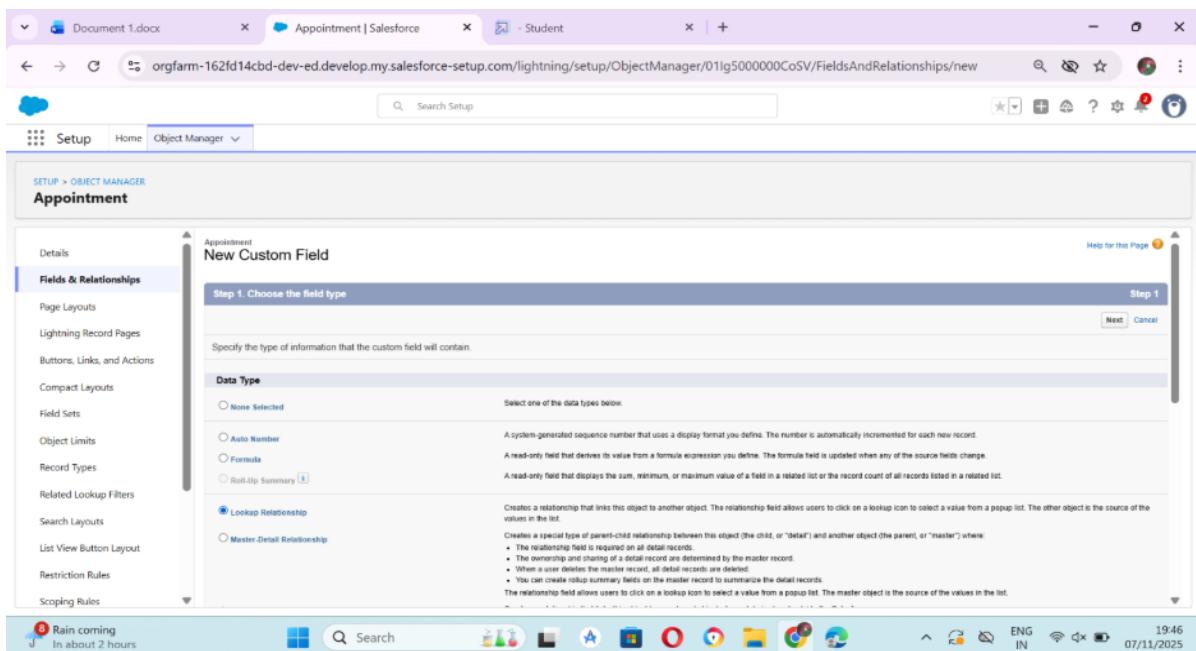
2. Now click on “Fields & Relationships” >> New



The screenshot shows the "Fields & Relationships" section for the Appointment object. The left sidebar has "Fields & Relationships" selected. The main area displays a table of fields, with "Appointment Date" and "Appointment Name" being the first two entries. The table includes columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment Date	Appointment_Date_c	Date		✓
Appointment Name	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Customer Details	Customer_Details_c	Lookup(Customer Details)		✓
Customer Name	Customer_Name_c	Lookup(Appointment)		✓
Gmail	Gmail_c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Maintenance service	Maintenance_service_c	Checkbox		
Owner	OwnerId	Lookup(User,Group)		✓

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

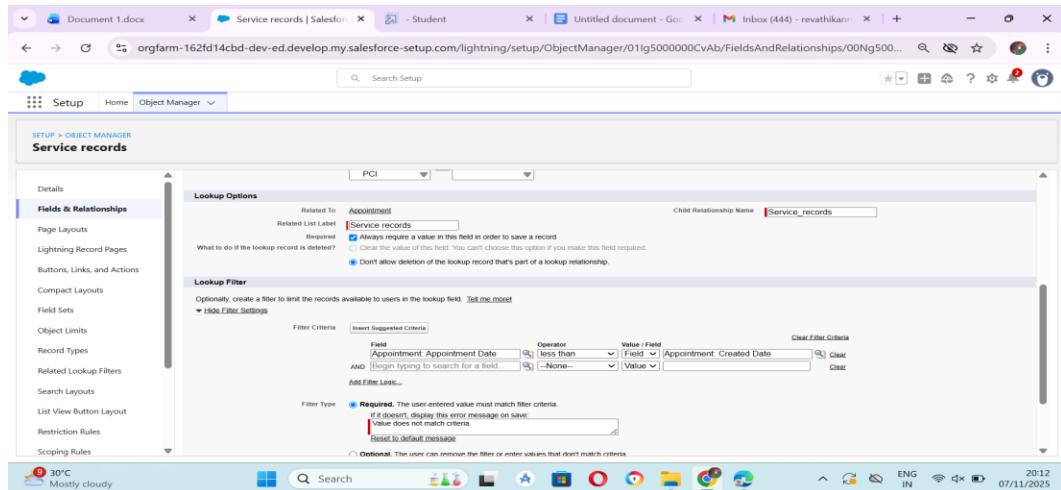


4. Select the related object “Customer Details” and click next.
5. Next >> Next >> Save.

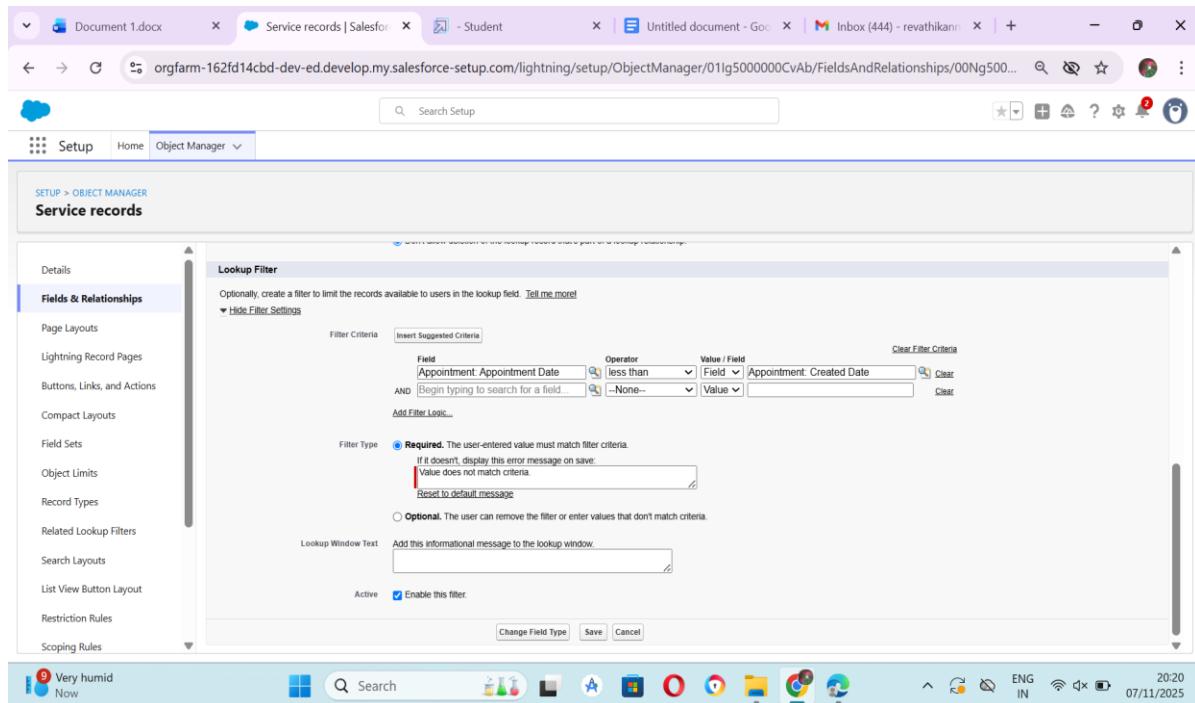
Note: Make sure you complete Activity 4 Before continuing.

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.
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.

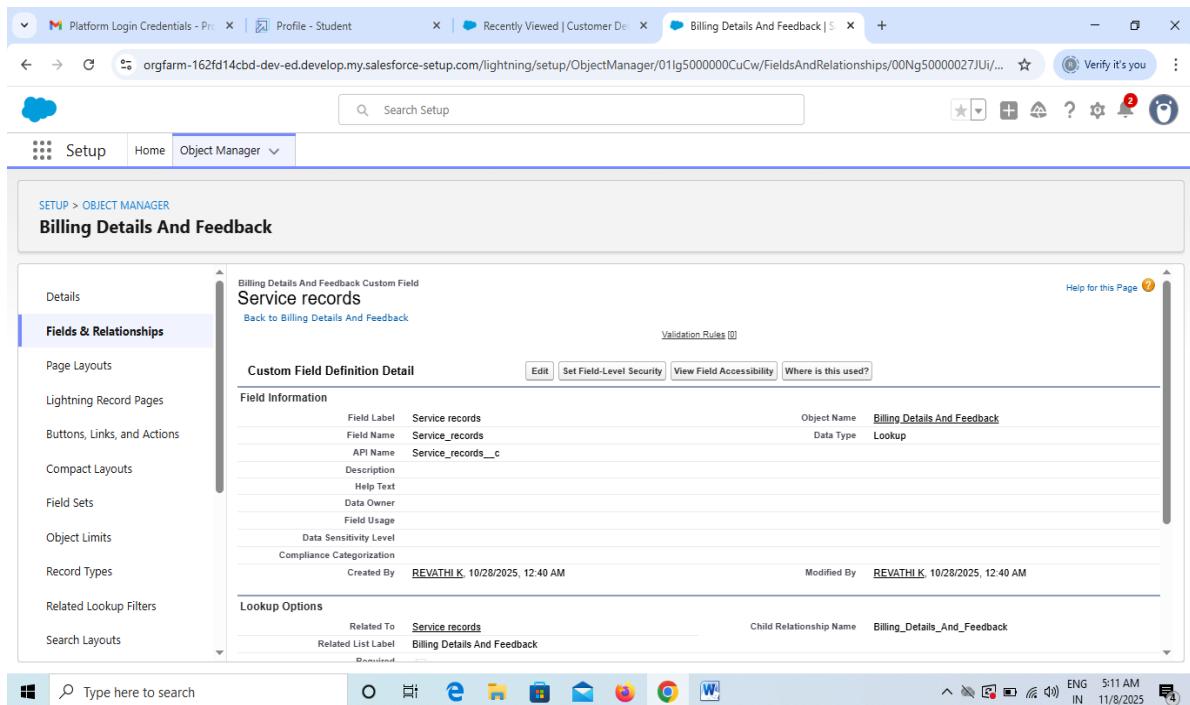


10. Error Message : Value does not match the criteria.
11. Enable the filter by click on Active.

12. Next >> Next >> Save.

2.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.Creation of Checkbox Field on Appointment Object :

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

The screenshot shows the Salesforce setup interface for the 'Appointment' object. The left sidebar lists various configuration options like Details, Page Layouts, Lightning Record Pages, etc. The main content area is titled 'Fields & Relationships' and contains a list of field types with their descriptions:

- Auto Number: A system-generated sequence number.
- Formula: A read-only field derived from a formula expression.
- Roll-Up Summary: A read-only field displaying the sum, minimum, or maximum value of a field in a related list.
- Lookup Relationship: Creates a relationship linking to another object.
- Master-Detail Relationship: A special type of parent-child relationship where ownership and sharing are determined by the master record.
- External Lookup Relationship: A relationship linking to an external object.
- Checkbox: Allows users to select True or False.
- Currency: Formats the field as a currency amount.
- Date: Allows users to enter a date or pick one from a calendar.
- Date/Time: Allows users to enter a date and time or pick one from a calendar.
- Email: Allows users to enter an email address.
- Geolocation: Allows users to define locations with latitude and longitude.
- Number: Allows users to enter any number.
- Percent: Allows users to enter a percentage.

The status bar at the bottom shows 'Air: Moderate Tomorrow' and the date '07/11/2025'.

4. Give the Field Label : Maintenance service
5. Field Name : is auto populated
6. Default value : unchecked

The screenshot shows the 'Custom Field Definition Edit' screen for the 'Appointment' object. The 'Field Information' tab is selected, showing the following details:

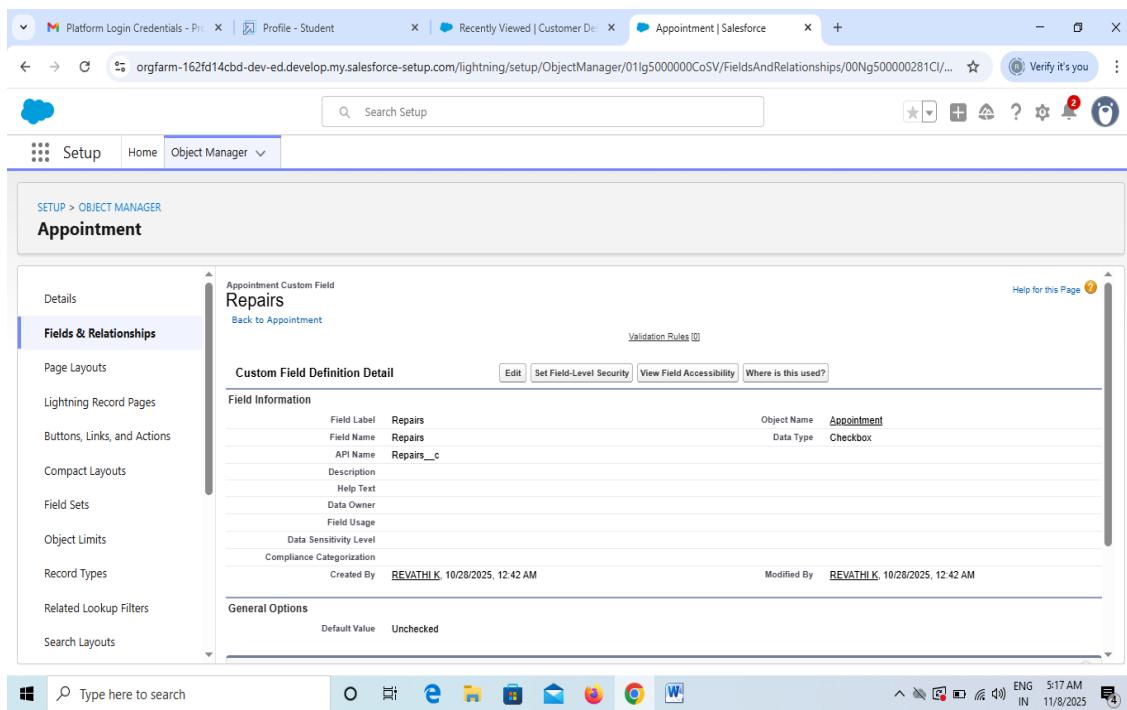
- Field Label: Maintenance service
- Field Name: Maintenance_service
- Description: (empty)
- Help Text: (empty)
- Data Owner: User
- Field Usage: None
- Data Sensitivity Level: None
- Compliance Categorization:
 - Available: PII, HIPAA, GDPR, PCI
 - Chosen: Chosen

The 'General Options' tab is also visible, showing the 'Default Value' as 'Unchecked'. The status bar at the bottom shows 'Very humid Now' and the date '07/11/2025'.

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

2.Creation of Another Checkbox Field on Appointment Object :

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



3.Creation of Checkbox Field on Service records Object :

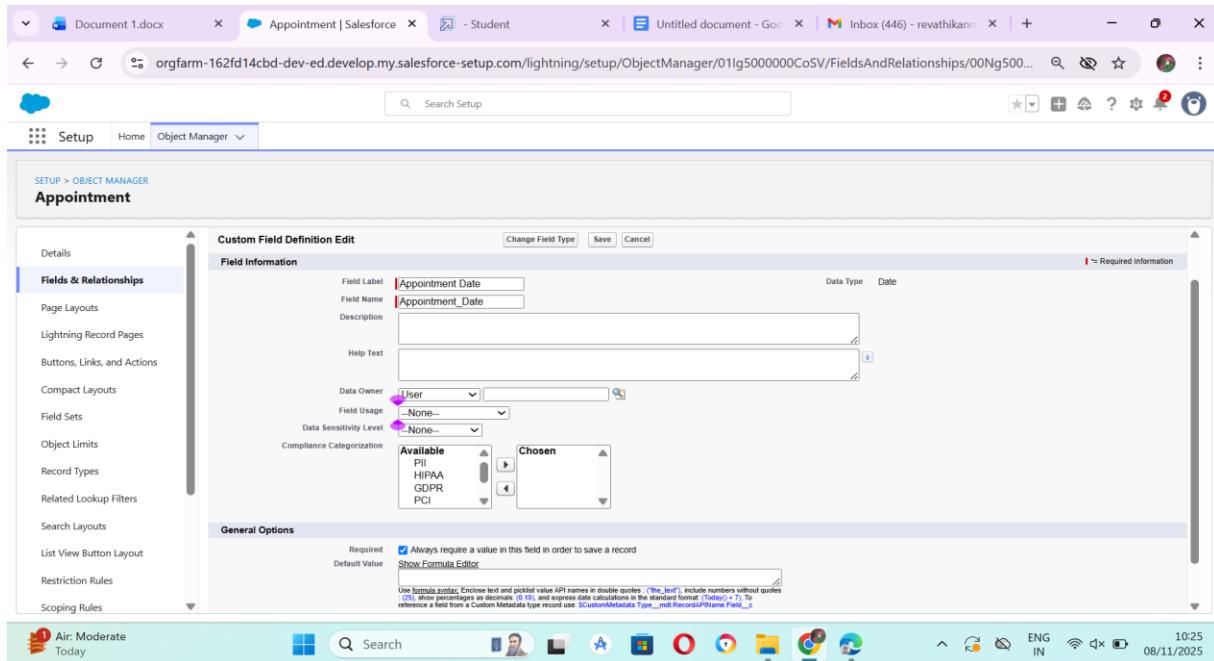
1. Go to setup >> click on Object Manager >> type object name(Service records) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select “Check box” as data type and click Next.
4. Give the Field Label : Quality Check Status
5. Field Name : is auto populated

6. Default value : unchecked
7. Click on next >> next >> save

Activity 4: Creation of date Fields

1.Creation of Date Field on Appointment Object :

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

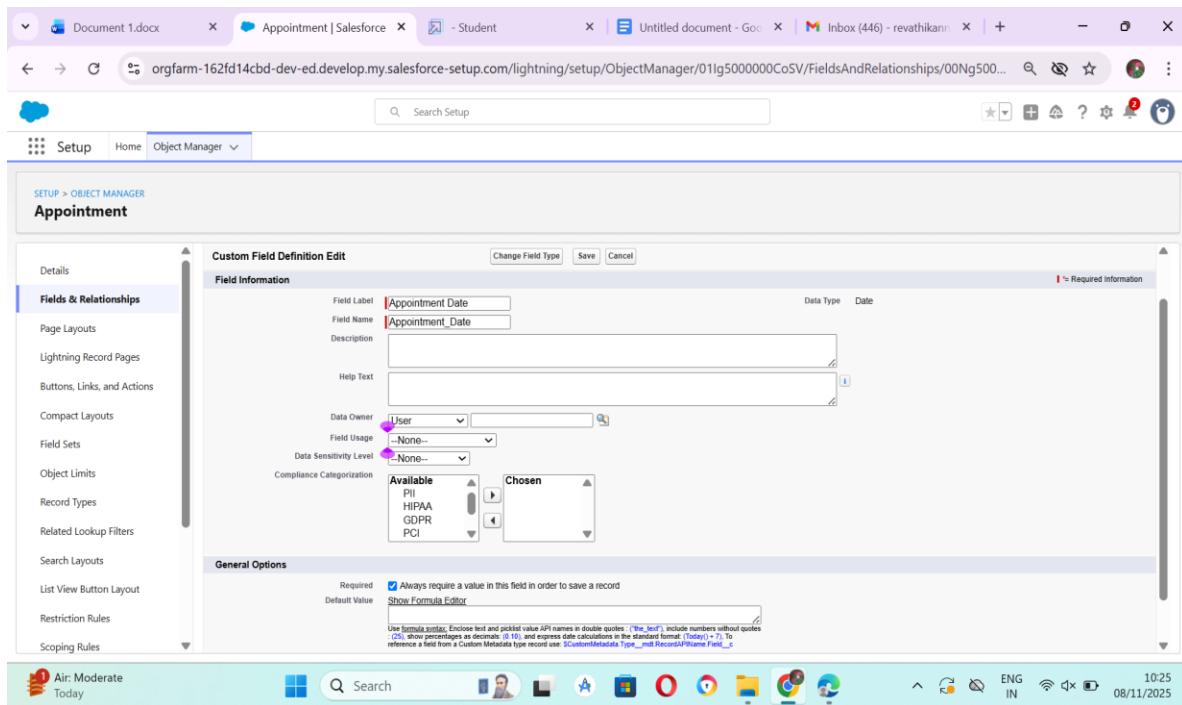


Activity 5:Creation of Currency Fields

1.Creation of Currency Field on Appointment Object :

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

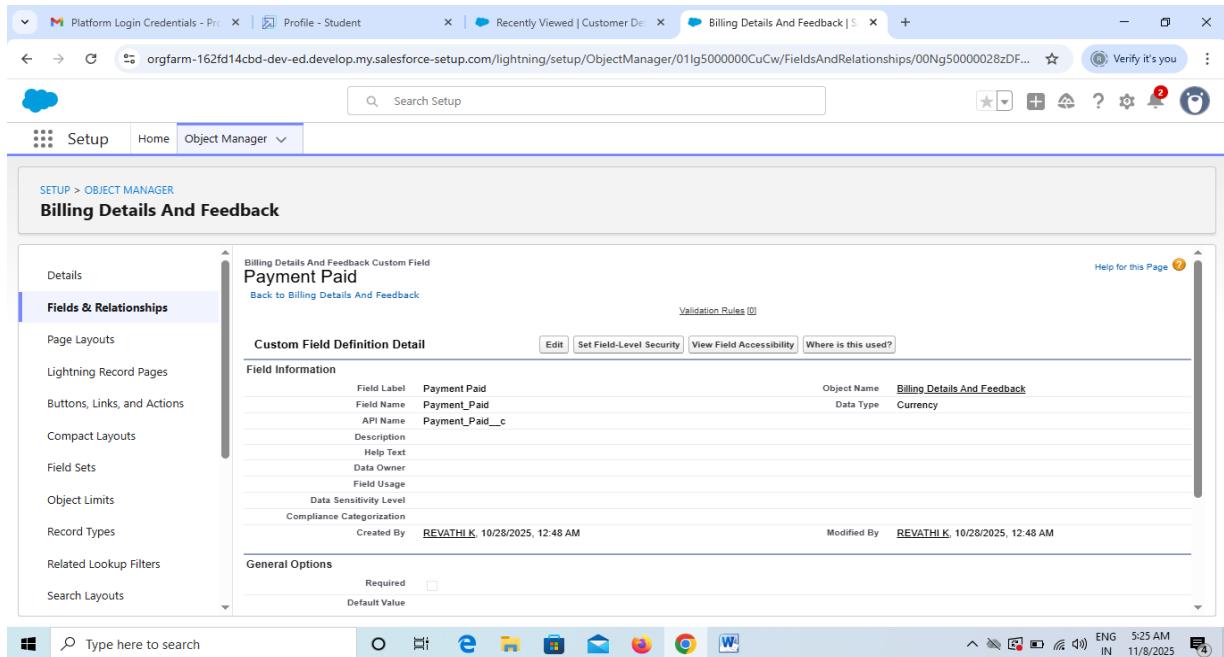
3. Select “Currency” as data type and click Next.
4. Give the Field Label : Service Amount
5. Field Nme : is auto populated



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

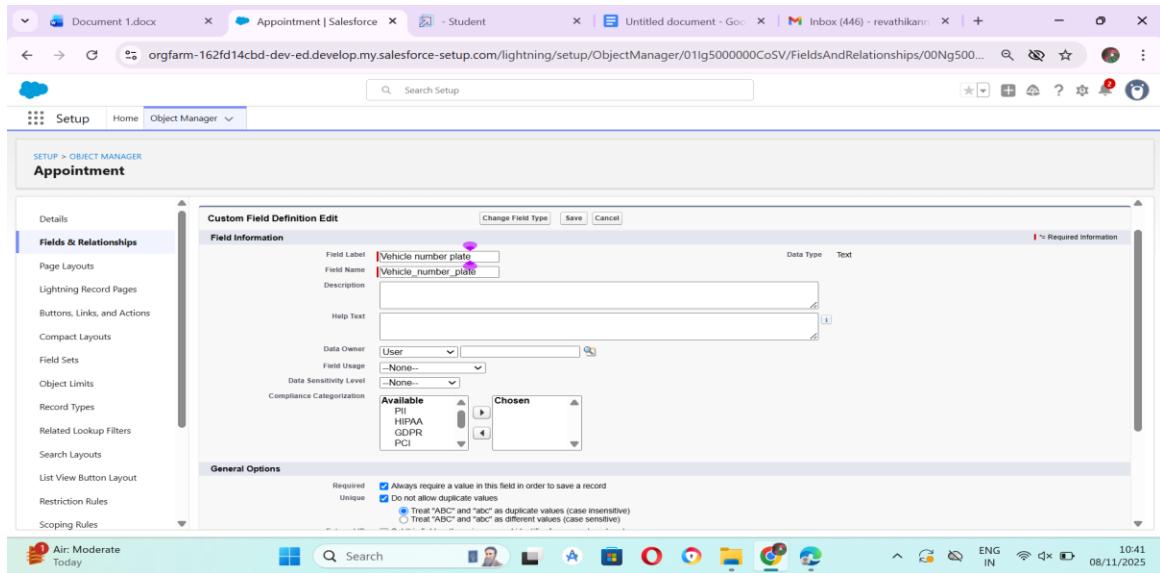
2. Creation of Currency Field on Billing details and feedback Object :

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



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.



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

2. 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

The screenshot shows the Salesforce Setup interface. The top navigation bar includes tabs for Platform Login Credentials, Profile - Student, Recently Viewed, and Billing Details And Feedback. The main header has a search bar labeled 'Search Setup' and various configuration icons. The left sidebar is titled 'SETUP > OBJECT MANAGER' and lists options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The central content area is titled 'Billing Details And Feedback' and shows a 'Custom Field Definition Detail' for a field named 'Rating for service'. The field details include:

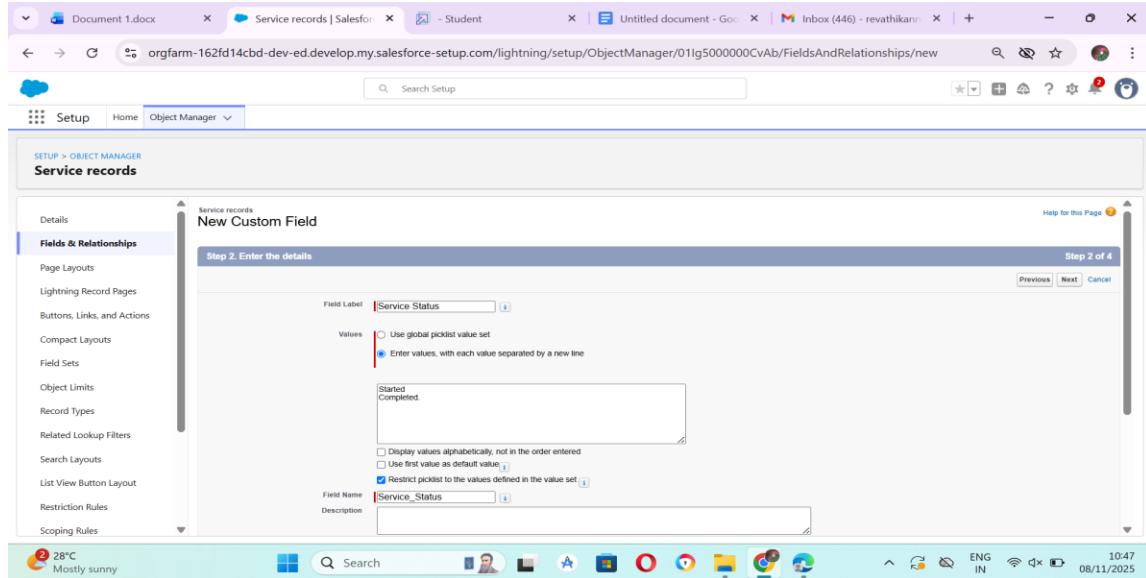
Field Label	Rating for service	Object Name	Billing Details And Feedback
Field Name	Rating_for_service	Data Type	Text
API Name	Rating_for_service_c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			
Created By	REVATHI_K_ 10/28/2025, 12:50 AM	Modified By	REVATHI_K_ 10/28/2025, 12:50 AM

The 'General Options' section indicates that the field is required. The bottom of the screen shows the Windows taskbar with various pinned icons and system status information.

Activity 7: Creation of Picklist Fields

1. Creation of Picklist Fields in Service records object :

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



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

2.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.

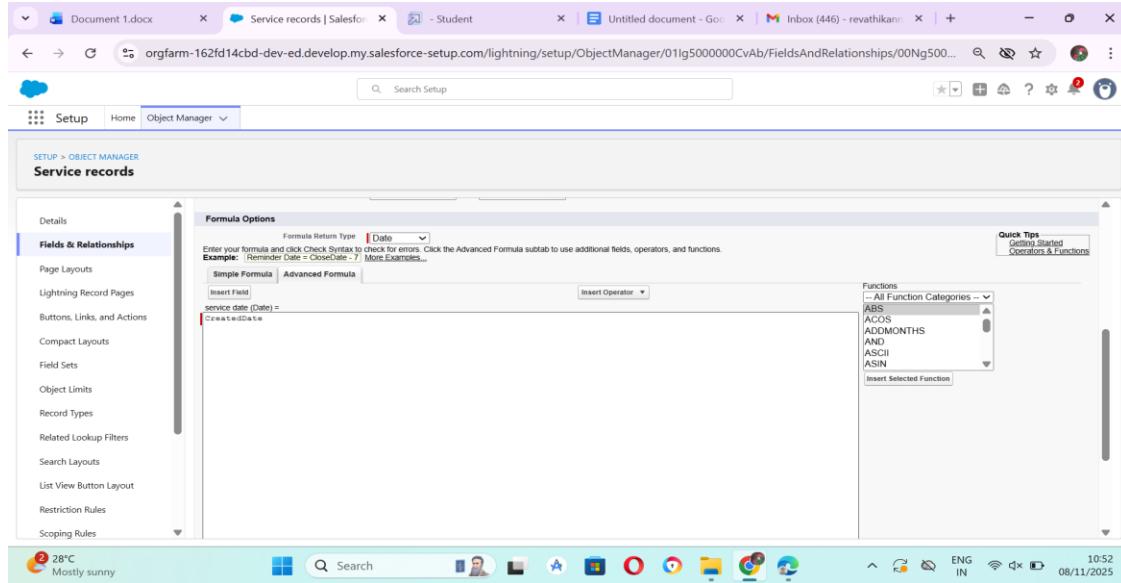
The screenshot shows the Salesforce Setup interface. The user is navigating through the Object Manager to create a new custom field. The object selected is 'Billing Details And Feedback'. The new field is named 'Payment Status' and is defined as a Picklist type. The field is currently empty, with no validation rules or field-level security applied.

Activity 8: 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.

The screenshot shows the Salesforce Setup interface. The user is navigating through the Object Manager to create a new custom field. The object selected is 'Service records'. The new field is named 'Service date' and is defined as a Date type. The field is currently empty, with no validation rules or field-level security applied.

- Insert field formula should be : CreatedDate



- click "Check Syntax" .
- Click next >> next >> Save.

Milestone 4:Validation rule

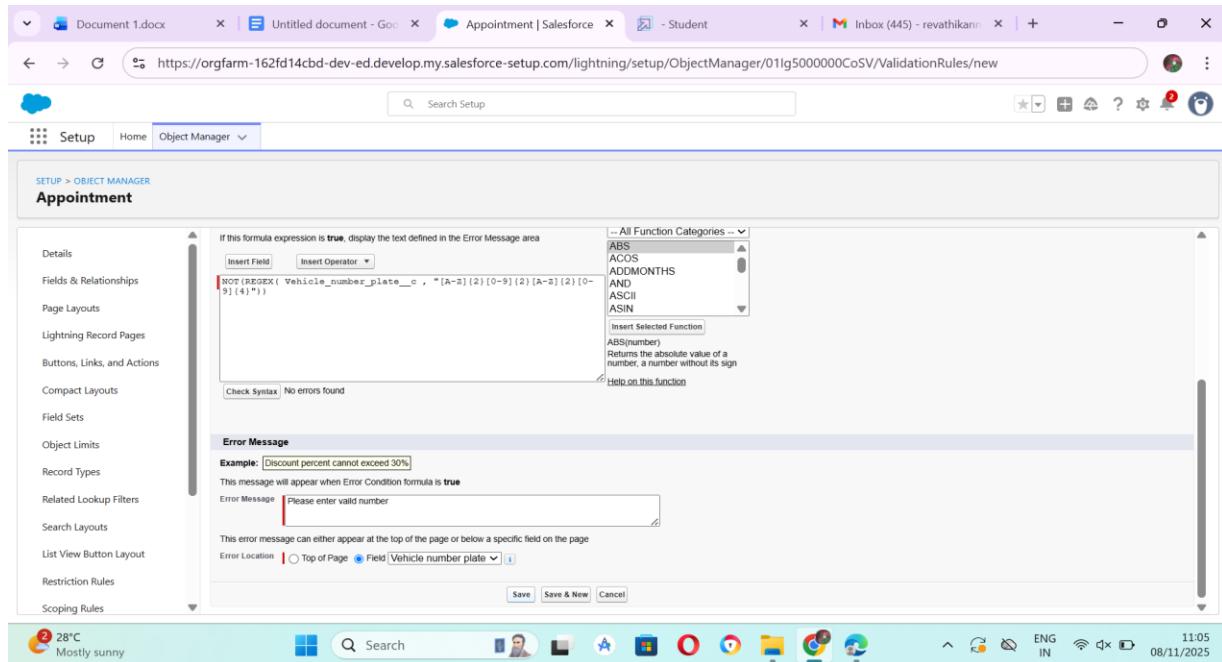
Validation rules are applied when a user tries to save a record and are used to check if the data meets specified criteria. If the criteria are not met, the validation rule triggers an error message and prevents the user from saving the record until the issues are resolved.

Activity 1:To create a validation rule to an Appointment Object

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

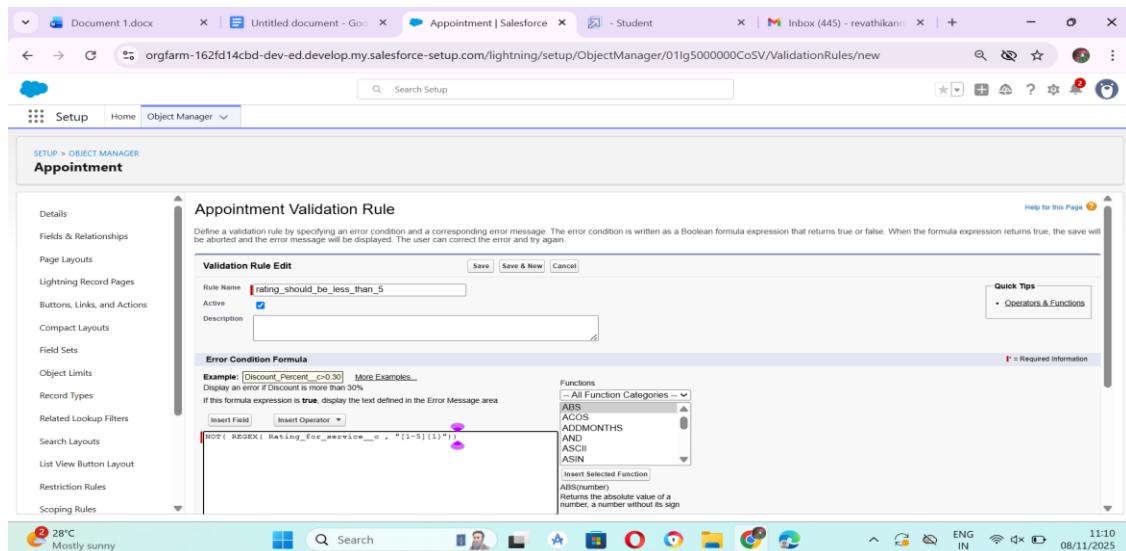
3. Enter the Rule name as “ Vehicle ”.
4. Insert the Error Condition Formula as :-
NOT(REGEX(Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))

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.

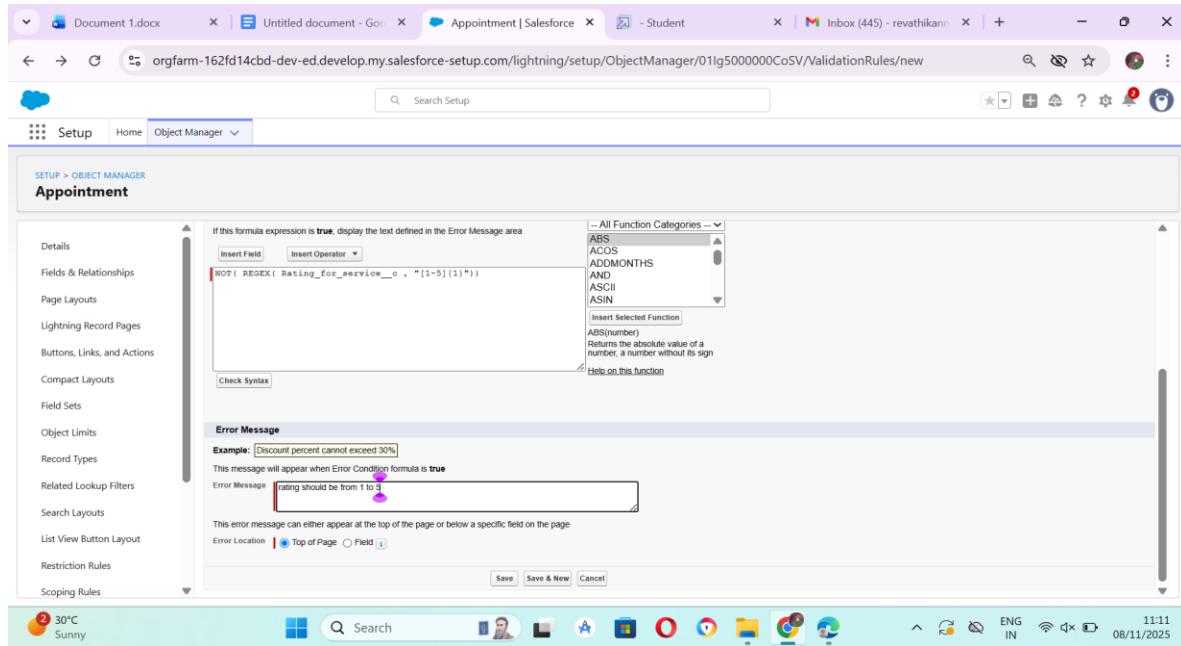


Activity 2: To create a validation rule to an Billing details and feedback Object

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}"))



- 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.



Phase 4:Project Development

Milestone 1:Duplicate rule

Activity 1:To create a matching rule to an Customer details Object

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

The screenshot shows the Salesforce Setup interface with the 'Matching Rules' page open. The page title is 'Matching Rules' under the 'SETUP' tab. The main section is titled 'All Matching Rules'. A table lists four existing matching rules:

Action	Role Name	Object	Status	New Rule Description	Last Modified Date	Last Modified By
Del Deactivate	Matching customer details	Customer Details	Active	Matching rule for account records. More info	10/22/2025	BR
Deactivate	Standard Account Matching Rule	Account	Active	Matching rule for contact records. More info	10/22/2025	DEBSC
Deactivate	Standard Contact Matching Rule	Contact	Active	Matching rule for lead records. More info	10/22/2025	DEBSC
Deactivate	Standard Lead Matching Rule	Lead	Active	Matching rule for lead records. More info	10/22/2025	DEBSC

At the bottom of the page, there are navigation links for letters A through Z and a link to 'Other' rules.

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

The screenshot shows the 'Rule Details' configuration page for creating a new matching rule. The page title is 'Matching Rules' under the 'SETUP' tab. The 'Rule Details' section is active, showing the following fields:

- Object:** Customer Details
- Role Name:** Matching customer details
- Unique Name:** Matching_customer_details
- Description:** (Empty text area)

The 'Matching Criteria' section contains a table with one row defined:

Field	Matching Method	Match Blank Fields	AND
Gmail	Exact	<input type="checkbox"/>	AND
Phone number	Exact	<input type="checkbox"/>	AND
-None-	Exact	<input type="checkbox"/>	AND
-None-	Exact	<input type="checkbox"/>	AND
-None-	Exact	<input type="checkbox"/>	

At the bottom right of the page are 'Previous', 'Save', and 'Cancel' buttons. The system status bar at the bottom shows '30°C Sunny' and the date '08/11/2025'.

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 Salesforce Setup interface with the Matching Rules page selected. The page title is "Matching Rules" and the sub-section is "Matching customer details". The "Matching Rule Detail" section displays the following information:

	Customer Details
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)
Matching Criteria	Active
Created By	REVATHI.K 10/28/2025, 1:00 AM
Modified By	REVATHI.K 10/28/2025, 1:00 AM

The status bar at the bottom indicates it's 11:19 on 08/11/2025, the weather is 30°C Sunny, and the system language is ENG IN.

Activity 2: To create a Duplicate rule to an Customer details Object

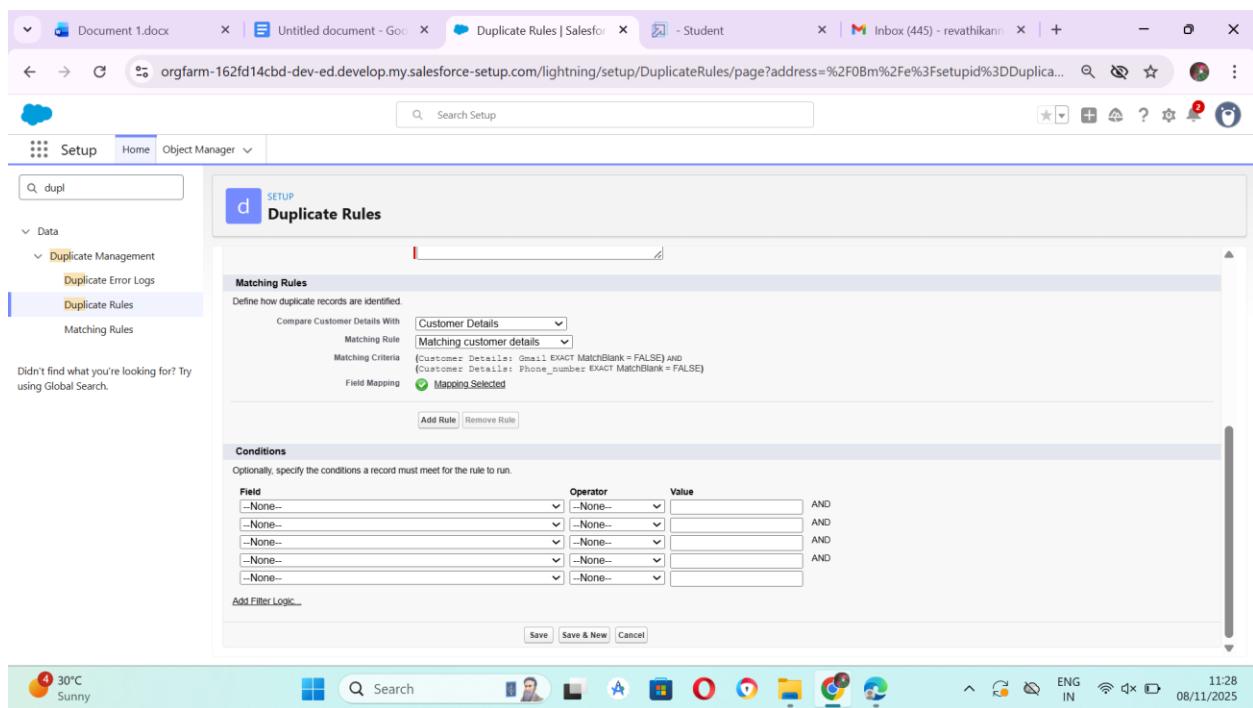
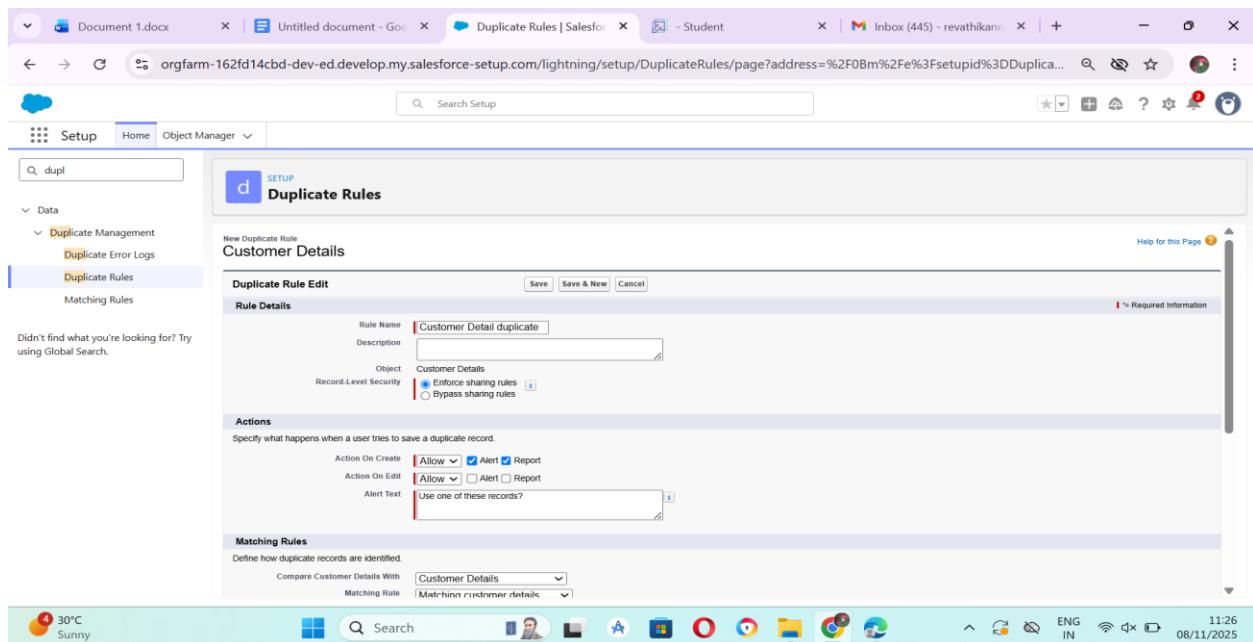
1. Go to quick find box in setup and search for Duplicate rules.
2. Click on Duplicate rule >> click on New Rule >> select customer details object.

The screenshot shows the Salesforce Setup interface with the Duplicate Rules page selected. The page title is "Duplicate Rules" and the sub-section is "All Duplicate Rules". The "What Are Duplicate Rules?" section provides a brief overview. The "View" dropdown is set to "All Duplicate Rules".

Rule Name	Description	New Rule	Matching Rule	Active	Last Modified By	Last Modified Date
Customer Detail duplicate	Identify accounts that duplicate other accounts.	Customer Details	Matching customer details	✓	rev	10/28/2025
Standard Account Duplicate Rule	Identify contacts that duplicate other contacts and leads.		Standard Account Matching Rule	✓	CEPIC	10/22/2025
Standard Contact Duplicate Rule	Identify leads that duplicate other leads and contacts.		Standard Contact Matching Rule	✓	CEPIC	10/22/2025
Standard Lead Duplicate Rule			Standard Lead Matching Rule	✓	CEPIC	10/22/2025

The status bar at the bottom indicates it's 11:25 on 08/11/2025, the weather is 30°C Sunny, and the system language is ENG IN.

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



Milestone 2: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, 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:

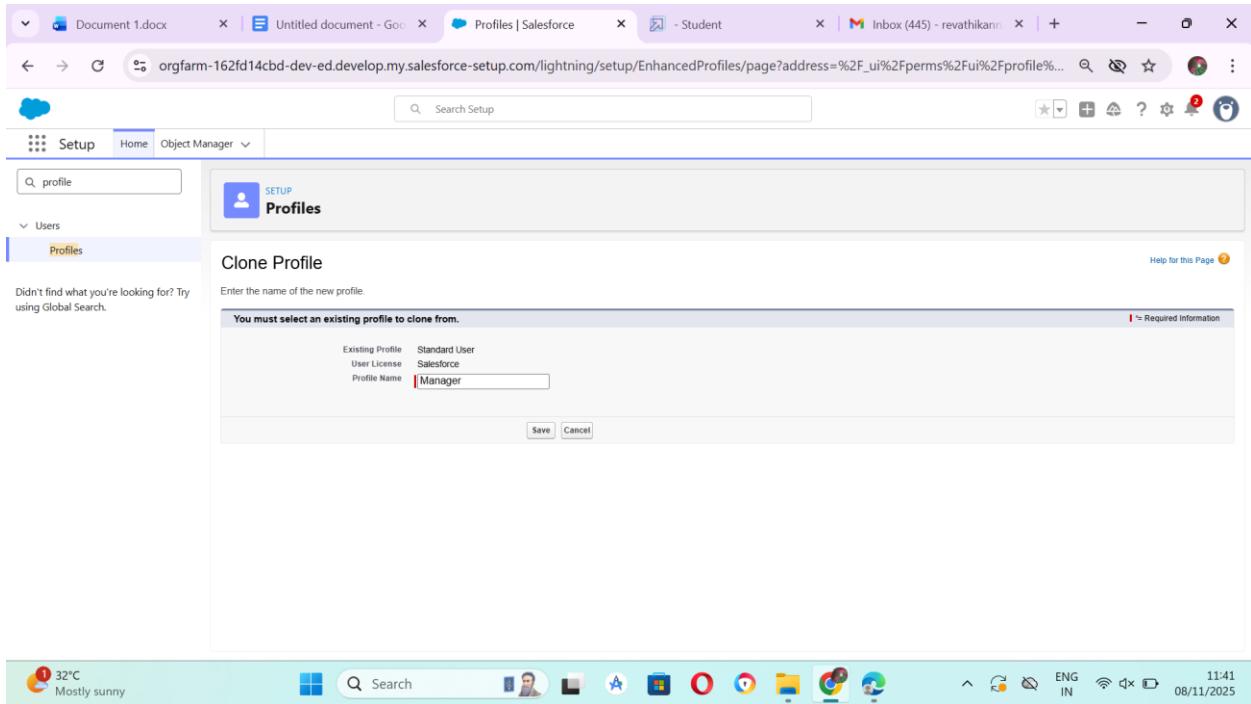
Custom ones defined by us.

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

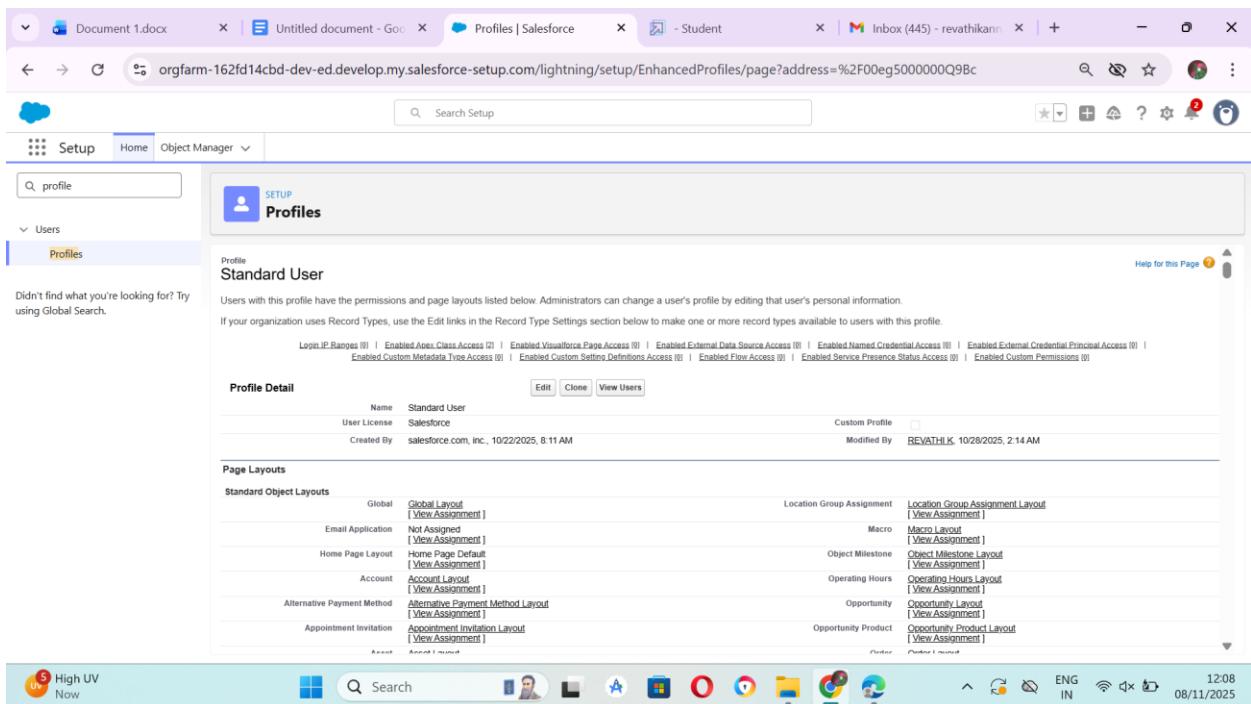
Activity 1:Manager Profile

To create a new profile:

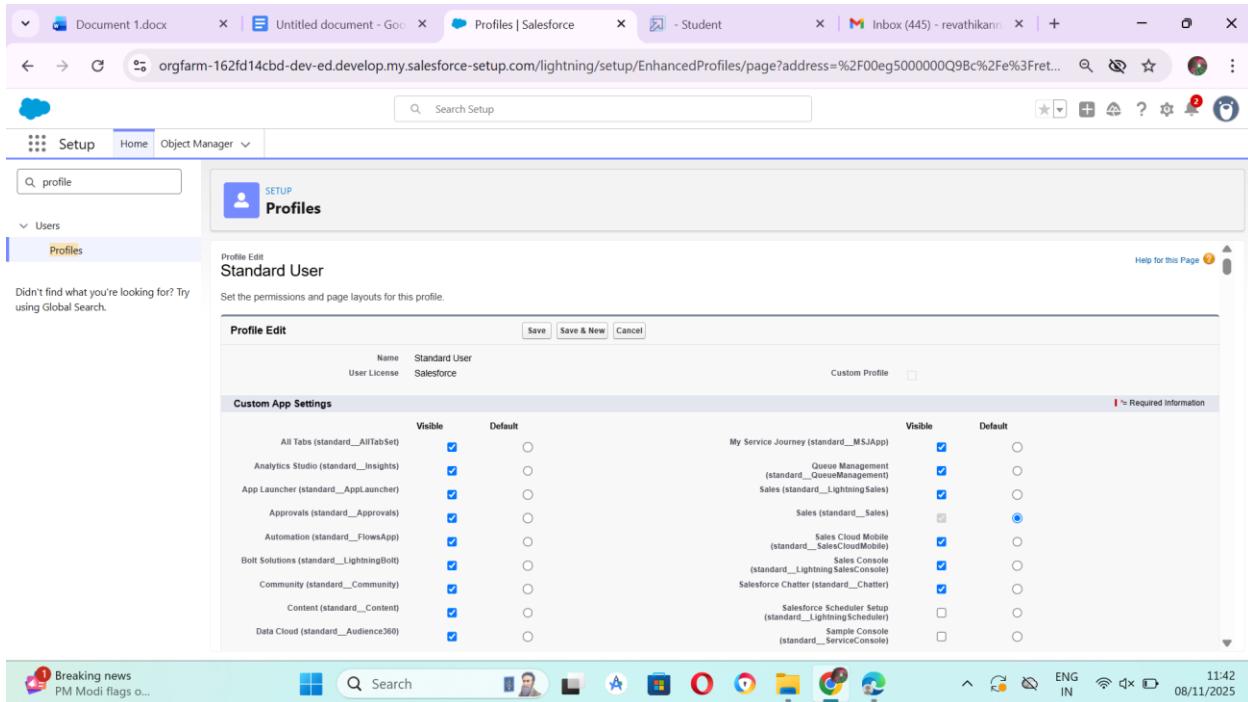
1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (Manager) >> Save.



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



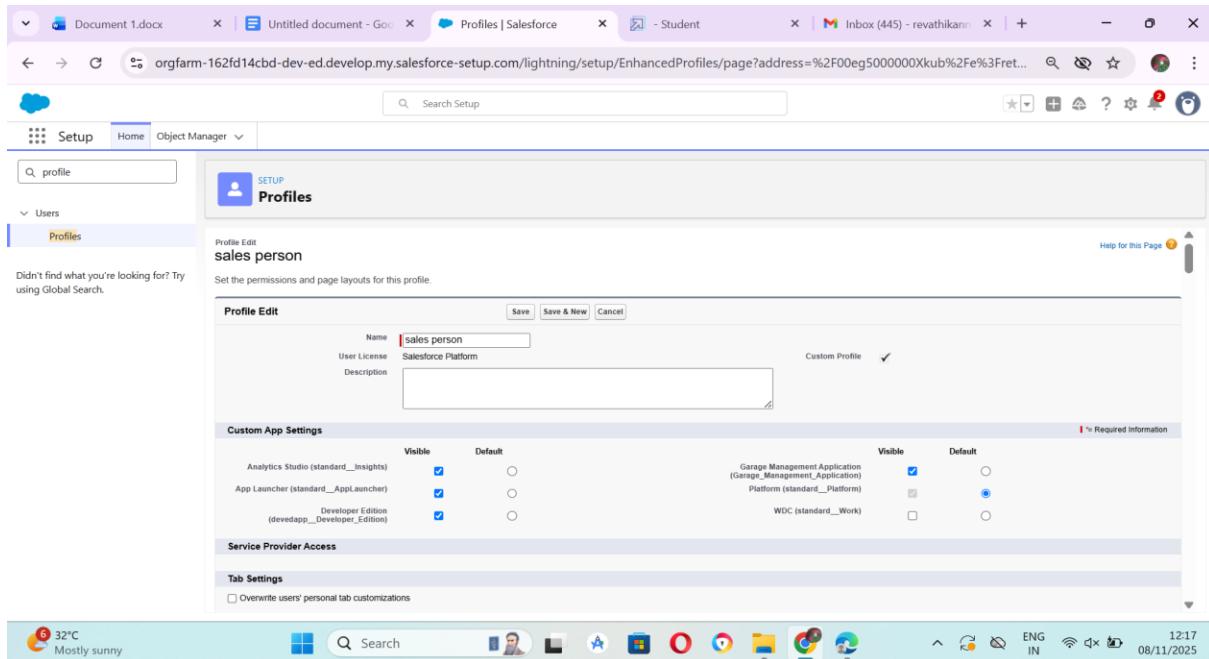
3. Select the Custom App settings as default for the Garage management.



4. Scroll down to Custom Object Permissions and Give access permissions for Appointments,Billing details and feedback , service records and customer details objects as mentioned in the below diagram.
5. Changing the session times out after should be “ 8 hours of inactivity”.
6. Change the password policies as mentioned :
7. User passwords expire in should be “ never expires ”.
8. Minimum password length should be “ 8 ”, and click save.

Activity 2:sales person Profile

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



5. And click save.

Milestone 3: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.

Activity 1:Creating Manager Role

Creating Manager Role:

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

The screenshot shows the Salesforce Setup interface for Roles. On the left, a sidebar lists categories like Sales, Service, and Case Teams, with 'Contact Roles on Contracts' highlighted. The main content area is titled 'Understanding Roles' and displays a 'Sample Role Hierarchy' diagram. The hierarchy starts with 'Executive Staff' (CEO, President, CFO, VP Sales) at the top level. Arrows point down to 'Western Sales Director', 'Eastern Sales Director', and 'International Sales Director' at the second level. Arrows from these three directors point down to 'Western Sales Rep', 'Eastern Sales Rep', and 'International Sales Rep' at the third level. A callout box for the top level says: 'View & edit data, roll up forecasts, & generate reports for all users below this level or of other Executive Staff'. A callout box for the middle level says: 'View & edit data, roll up forecasts, & generate reports for users directly below this level'. A callout box for the bottom level says: 'View & edit data, roll up forecasts, & generate reports for users directly below this level. Can't access data of users above or at same level'. At the bottom right of the main area are 'Set Up Roles' and 'Don't show this page again' buttons.

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

The screenshot shows the same Salesforce Roles setup page, but now the 'Your Organization's Role Hierarchy' tree is fully expanded under 'IMAYAM COLLEGE OF ENGINEERING'. The tree includes nodes for CEO, CFO, COO, Manager, sales_person, SVP_Customer_Service & Support, Customer_Support_International, Customer_Support_North_America, and Installation & Repair Services, each with 'Edit | Del | Assign' options. A 'Show in tree view' button is visible at the top right of the tree area. The browser taskbar at the bottom shows various open tabs and system icons.

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

The screenshot shows the Salesforce Setup Roles page. On the left, a sidebar menu is open under 'Users' with 'Roles' selected. The main area is titled 'Role Edit' and shows a 'New Role' form. In the 'Label' field, 'Manager' is typed. The 'Role Name' field also contains 'Manager'. Below it, 'This role reports to' has 'CEO' selected. A note at the bottom says 'Role Name as displayed on reports' followed by a text input field. At the bottom right of the form are 'Save', 'Save & New', and 'Cancel' buttons. The top navigation bar includes tabs for 'Setup', 'Home', and 'Object Manager'. The status bar at the bottom shows system information like 'Air: Moderate Tomorrow' and the date '08/11/2025'.

Activity 2:Creating another roles

Creating another two roles under manager

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

The screenshot shows the Salesforce Setup Roles page with the 'Roles' section selected in the sidebar. The main area is titled 'Creating the Role Hierarchy' and displays a tree view of roles. The hierarchy starts with 'IMAYAM COLLEGE OF ENGINEERING' at the root level, which branches into 'CEO', 'CFO', 'COO', 'Manager', 'sales.person', 'SVP_Customer Service & Support', 'Customer.Support.International', 'Customer.Support.North America', and 'Installation & Repair Services'. Each node has 'Edit | Del | Assign' buttons. A note at the top says 'You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.' A 'Show in tree view' button is located at the top right. The status bar at the bottom shows 'Air: Moderate Tomorrow' and the date '08/11/2025'.

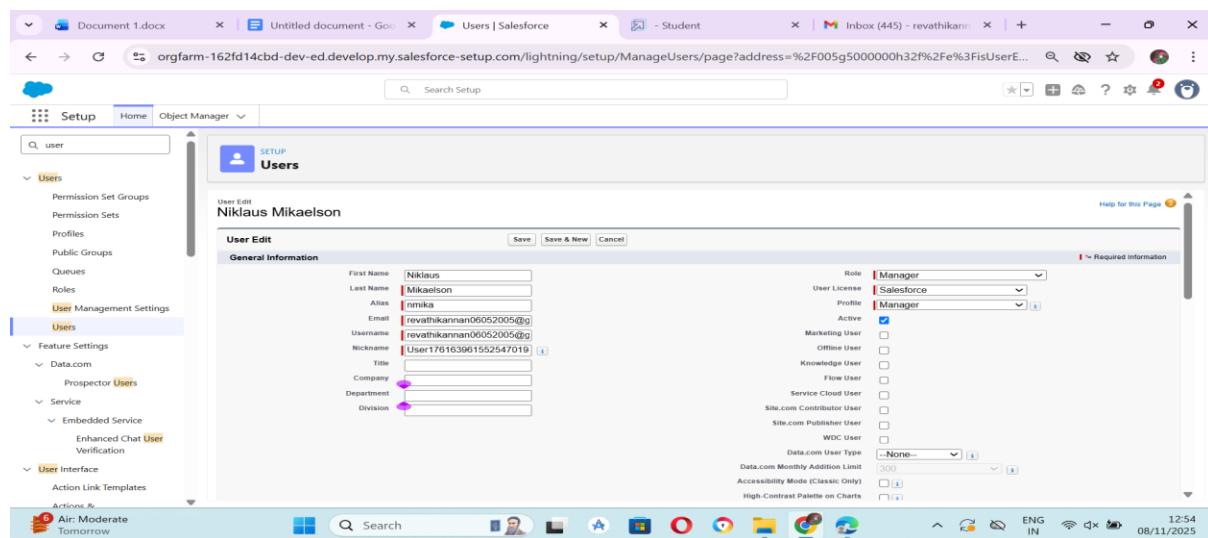
3. Give Label as “sales person” and Role name gets auto populated. Then click on Save.

Milestone 4: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.

Activity 1:Create User

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



3. Save.

Activity 2:creating another users

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

Note : create atleast 3 users with these permissions.

The screenshot shows the Salesforce Setup - Users page. On the left, there's a sidebar with navigation links like Home, Object Manager, and a search bar. The main area has a title 'SETUP Users' with a subtitle 'On this page you can create, view, and manage users.' Below this, there's a message about getting more licenses and a 'Let's Go' button. A 'View' dropdown is set to 'All Users'. The main table lists users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table includes rows for Chatter Expert, EPIC_OrgFarm, K_REVATHI, Mikaelson_Niklaus, revathikannan0652005157@agentforce.com, nmika, nmika, nmika, revathi06052005@gmail.com, revathi06052005@gmail.com, integ, and User_Security. The 'Profile' column indicates roles like Chatter Free User, System Administrator, Manager, sales person, and Analytics Cloud Security User.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chatv.00dg5000000l7team.sdb1xdkanlg@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	EPIC_OrgFarm	QEPIC	epic.3781c65fbfd@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	K_REVATHI	rev	revathikannan0652005157@agentforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	Mikaelson_Niklaus	nmika	reshma123456@gmail.com	sales person	<input checked="" type="checkbox"/>	sales person
<input type="checkbox"/> Edit	Mikaelson_Niklaus	nmika	revathi06052005@gmail.com	Manager	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/> Edit	Mikaelson_Niklaus	nmika	revathi06052005@gmail.com	sales person	<input checked="" type="checkbox"/>	sales person
<input type="checkbox"/> Edit	User_Integration	integ	integration@00dg5000000l7team.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00dg5000000l7team.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Milestone 5: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.

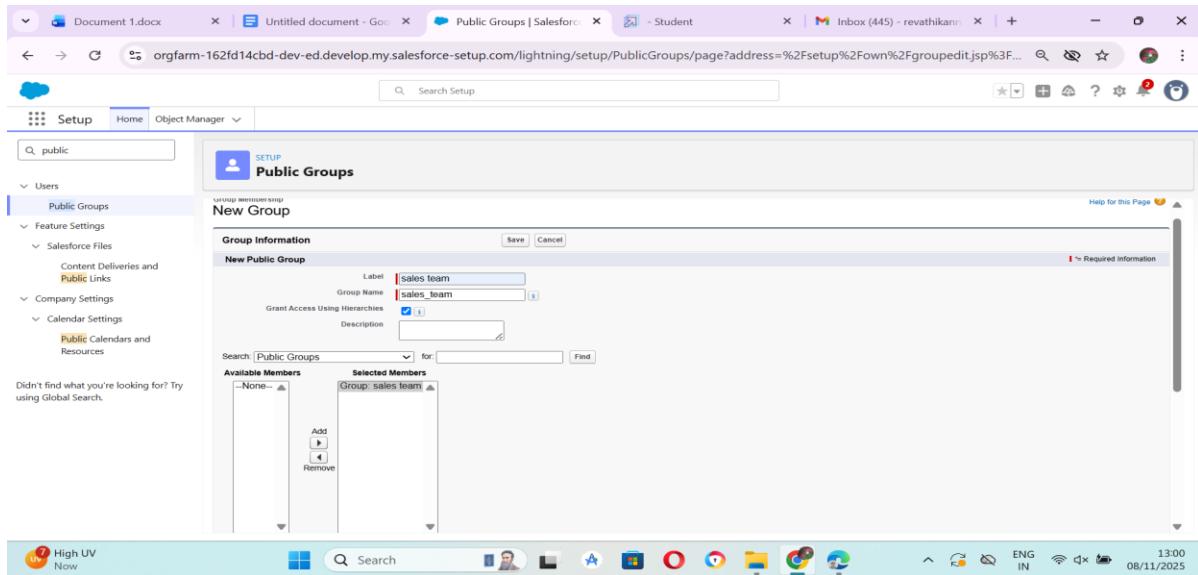
Activity 1:Creating New Public Group

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

The screenshot shows the Salesforce Setup interface with the following details:

- Page Header:** Document 1.docx, Untitled document - Google Sheets, Public Groups | Salesforce, - Student, Inbox (445) - revathikan...
- Setup Navigation:** Setup, Home, Object Manager
- Search Bar:** Q Search Setup
- Left Sidebar:** Users, Public Groups (selected), Feature Settings, Salesforce Files, Company Settings, Calendar Settings, Public Calendars and Resources. A note says "Didn't find what you're looking for? Try using Global Search."
- Public Groups Page:**
 - Title:** Public Groups
 - Description:** 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 Options:** All, Edit, Create New View
 - Table Headers:** Action, Label, Group Name, Created By, Created Date
 - Table Data:** One row for 'sales_team' created by 'K.REVATHI' on '10/28/2025, 1:33 AM'
 - Actions:** New, Edit, Del
- Page Footer:** https://orgfarm-162fd14cbd-dev-ed.develop.my.salesforce-setup.com/lightning/setup/PublicGroups/home
- System Status Bar:** High UV Now, Search, Microsoft Edge, Google Chrome, File Explorer, Task View, Start, ENG IN, 12:59, 08/11/2025

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.



Milestone 6: 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, such as:

1. 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.

2. 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 combination with OWD settings to grant different levels of access.

3. Profiles and Permission Sets:

Profiles and permission sets allow administrators to specify object-level and field-level permissions for users.

Profiles are typically used to grant general object and field access, while permission sets can be used to extend those permissions to specific users.

4. Sharing Rules:

Sharing rules are used to extend access to records for users who meet specific criteria. They can be used to grant read-only or read-write access to records owned by other users.

Manual Sharing:

Administrators and record owners can manually share specific records with other users or groups.

Activity 1: 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.

The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. The left sidebar has 'Sharing Settings' selected under 'Security'. The main area displays sharing rules for various objects. A table lists objects on the left and sharing levels (Public Read Only, Private) on the right. Buttons for 'Save' and 'Cancel' are at the bottom.

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

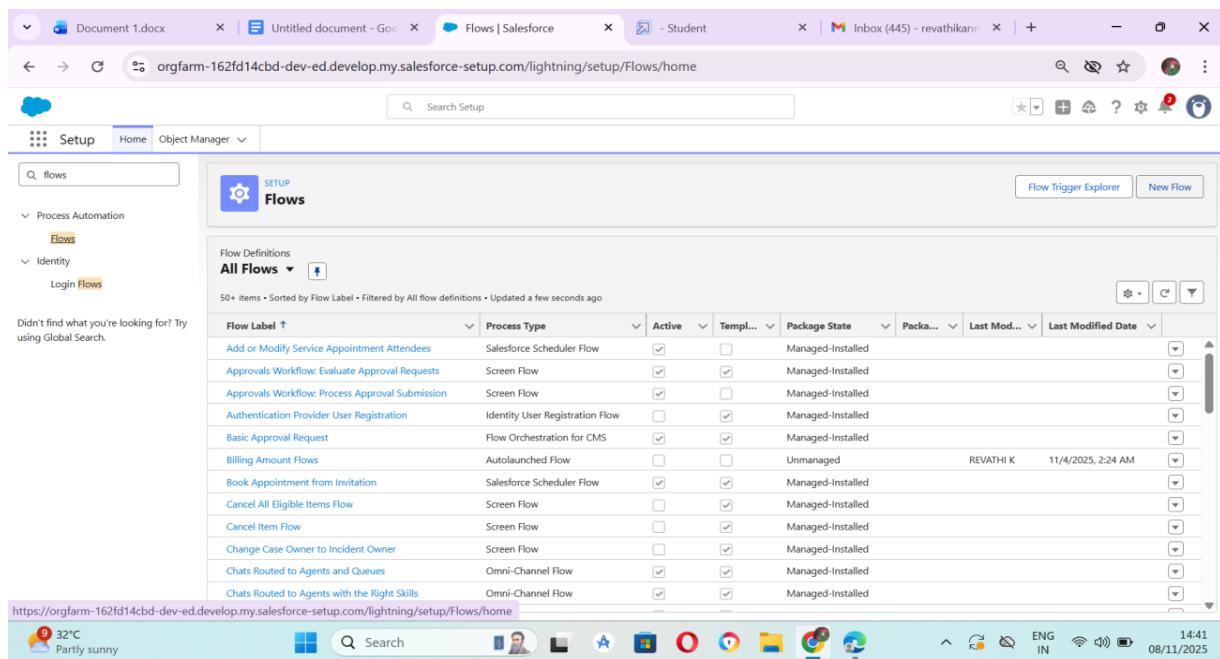
The screenshot shows the 'Service records Sharing Rule' creation page. It includes fields for Label (Sharing setting), Rule Name (Sharing_setting), Description, Service records (owned by sales person), Share with (Role: Manager), Access Level (Read/Writer), and Created By (REVATHIK 10/28/2025, 1:38 AM). Buttons for 'Save' and 'Cancel' are at the bottom.

Milestone 7:Flows

In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

Activity 1:Create a Flow

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

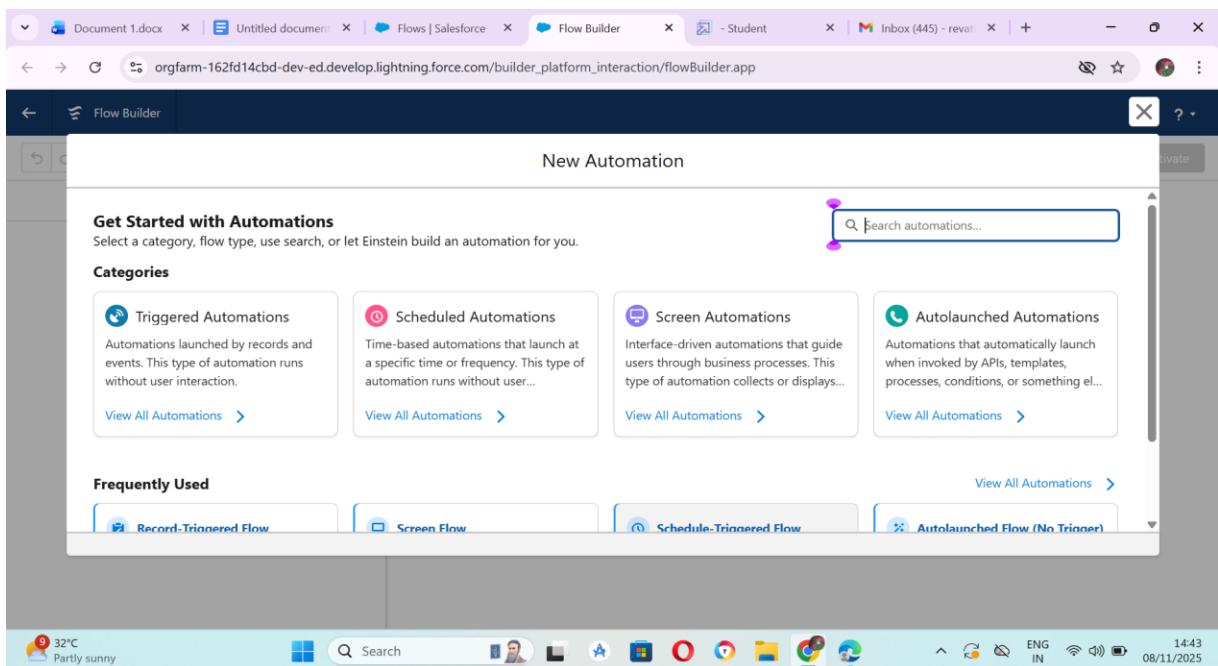


The screenshot shows the Salesforce Setup interface with the following details:

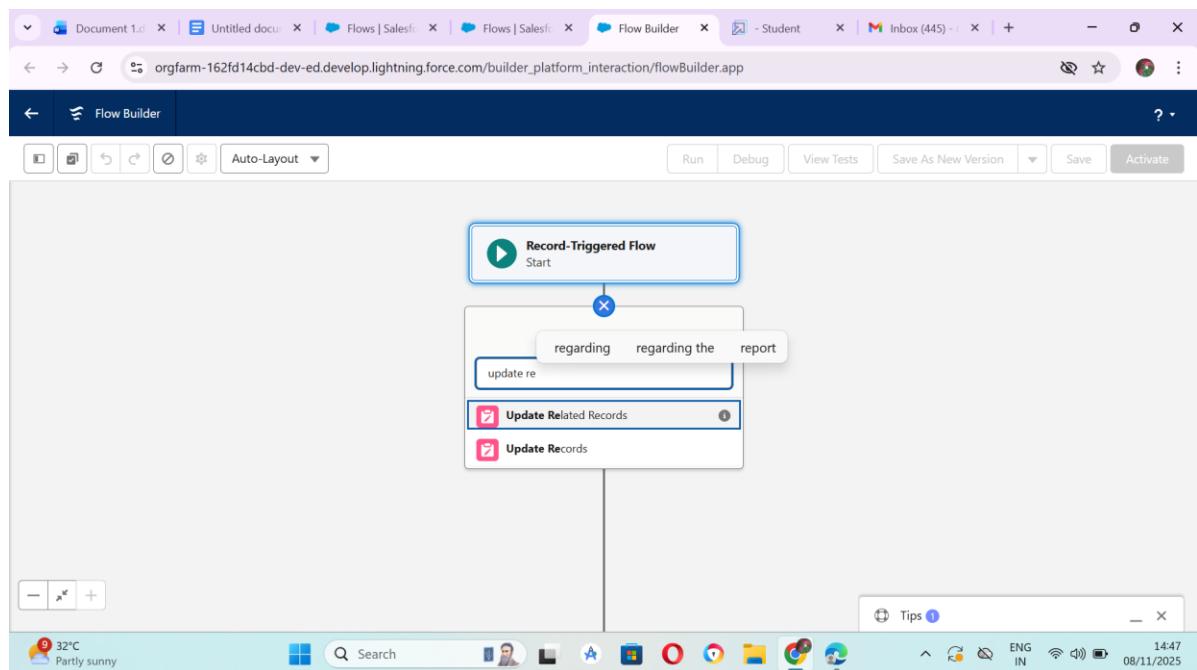
- Header:** Document 1.docx, Untitled document - Google Sheets, Flows | Salesforce, - Student, Inbox (445) - revathikann.
- Page:** Flows
- Left Sidebar:** Setup, Home, Object Manager. Under Process Automation, the Flows tab is selected.
- Search Bar:** Search Setup
- Buttons:** Flow Trigger Explorer, New Flow
- Section:** Flow Definitions, All Flows
- Table:** A list of flows with columns: Flow Label, Process Type, Active, Template, Package State, Packag..., Last Modified Date.
- Table Data:** (Partial list)

Flow Label	Process Type	Active	Template	Package State	Packag...	Last Modified Date
Add or Modify Service Appointment Attendees	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed		
Approvals Workflow: Evaluate Approval Requests	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed		
Approvals Workflow: Process Approval Submission	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed		
Authentication Provider User Registration	Identity User Registration Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed		
Basic Approval Request	Flow Orchestration for CMS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed		
Billing Amount Flows	Autolaunched Flow	<input type="checkbox"/>	<input type="checkbox"/>	Unmanaged	REVATHI K	11/4/2025, 2:24 AM
Book Appointment from Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed		
Cancel All Eligible Items Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed		
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed		
Change Case Owner to Incident Owner	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed		
Chats Routed to Agents and Queues	Omni-Channel Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed		
Chats Routed to Agents with the Right Skills	Omni-Channel Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed		
- Bottom:** URL https://orgfarm-162fd14cbd-dev-ed.develop.my.salesforce-setup.com/lightning/setup/Flows/home, Taskbar with various icons, and system status bar showing Partly sunny, 32°C, ENG IN, 14:41, 08/11/2025.

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



3. Select the Object as “Billing details and feedback” in the Drop down list.
4. Select the Trigger Flow when: “A record is Created or Updated”.
5. Select the Optimize the flow for: “Actions and Related Records” and Click on Done.
6. Under the Record-triggered Flow Click on “+” Symbol and In the Drop down List select the “Update records Element”.



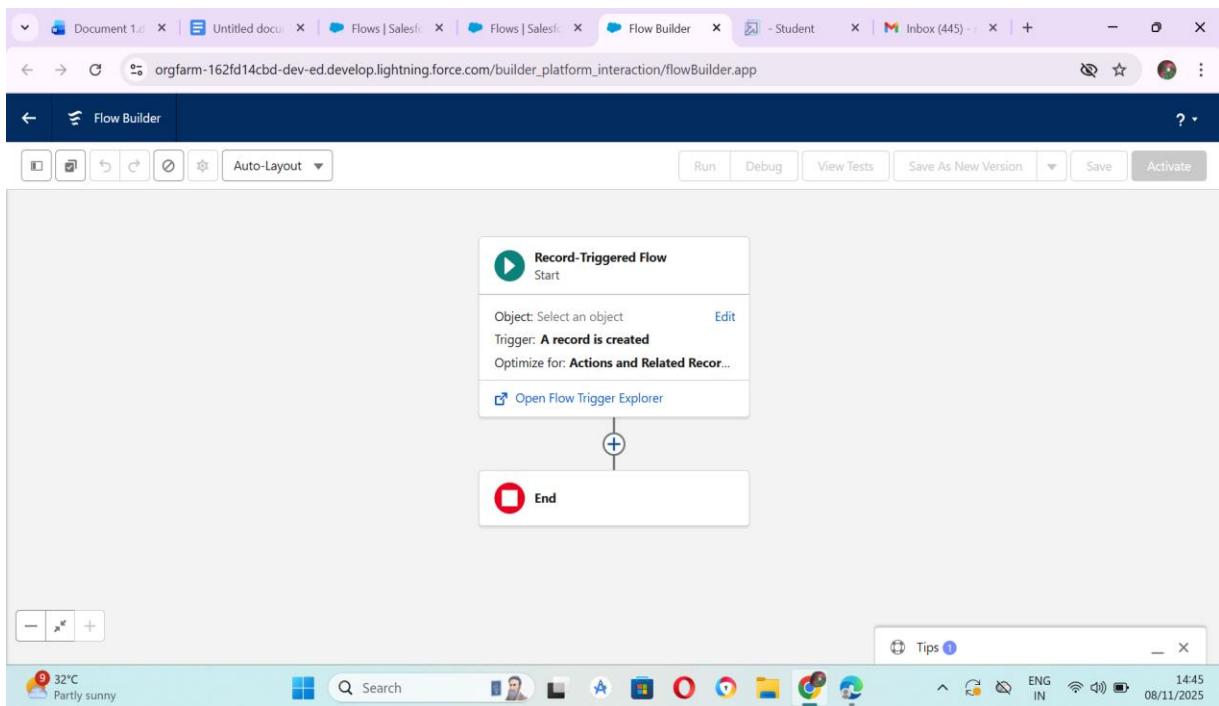
7. Give the Label Name : Amount Update
8. Api name : is auto populated
9. Set a filter condition : All Conditions are met(AND)
10. Field : Payment_Status__c
11. Operator : Equals
12. Value : Completed
13. And Set Field Values for the Billing details and feedback Record
14. Field : Payment_Paid__c
15. Value : {\$Record.Service_records__r.Appointment__r.Service_Amount__c}
16. Click On Done.
17. Before creating another Element. Create a New Resource form Toolbox form top left.
18. Click on the New Resource, And select Variable.
19. Select the resource type as text template.
20. Enter the API name as “ alert”.
21. Change the view as Rich Text ? View to Plain Text.
22. In body field paste the syntax that given below.

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

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

Amount paid : {\$Record.Payment_Paid__c}

Thank you for Coming .



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

Activity 2:Create another Flow

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

The screenshot shows the Salesforce Setup Flows page. The left sidebar has categories: Process Automation (Flows selected), Identity, and Login Flows. A search bar at the top says "Search Setup". The main area is titled "SETUP Flows" with a "Flow Definitions" section. It shows a table of "All Flows" with columns: Flow Label, Process Type, Active, Temp..., Package State, Packa..., Last Mod..., Last Modified Date. The table lists various flows like "Add or Modify Service Appointment Attendees", "Approvals Workflow: Evaluate Approval Requests", etc. At the bottom right of the table is a "New Flow" button.

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

The screenshot shows the Flow Builder "New Automation" page. The top navigation bar includes tabs for Document 1.docx, Untitled document, Flows | Salesforce, Flow Builder, and Student. The main content area is titled "New Automation" and features a "Get Started with Automations" section with a search bar. Below are four categories: "Triggered Automations", "Scheduled Automations", "Screen Automations", and "Autolaunched Automations". Under "Frequently Used", there are four items: "Record-Triggered Flow", "Screen Flow", "Schedule-Triggered Flow", and "Autolaunched Flow (No Trigger)".

3. Select the Object as “ **Service records**”in the Drop down list.
4. Select the Trigger Flow when: “A record is Created or Updated”.
5. Select the Optimise the flow for: “Actions and Related Records” and Click on Done.
6. Under the Record-triggered Flow Click on “+” Symbol and In the Drop down List select the “Update records Element”.
7. Set a filter condition : All Conditions are met(AND)
8. Field : **Quality_Check_Status__c**
9. Operator : **Equals**
10. Value : **True**
11. And Set Field Values for the Billing details and feedback Record
12. Field : **Service_Status__c**
13. Value : **Complete.**
14. Click On **Done**.
15. Click on **save**
16. Given the Flow label as **Update Service Status** , Flow Api name will be auto populated.
17. And click save, and click on **activate**.

Milestone 8: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 primarily two types of Apex Triggers:

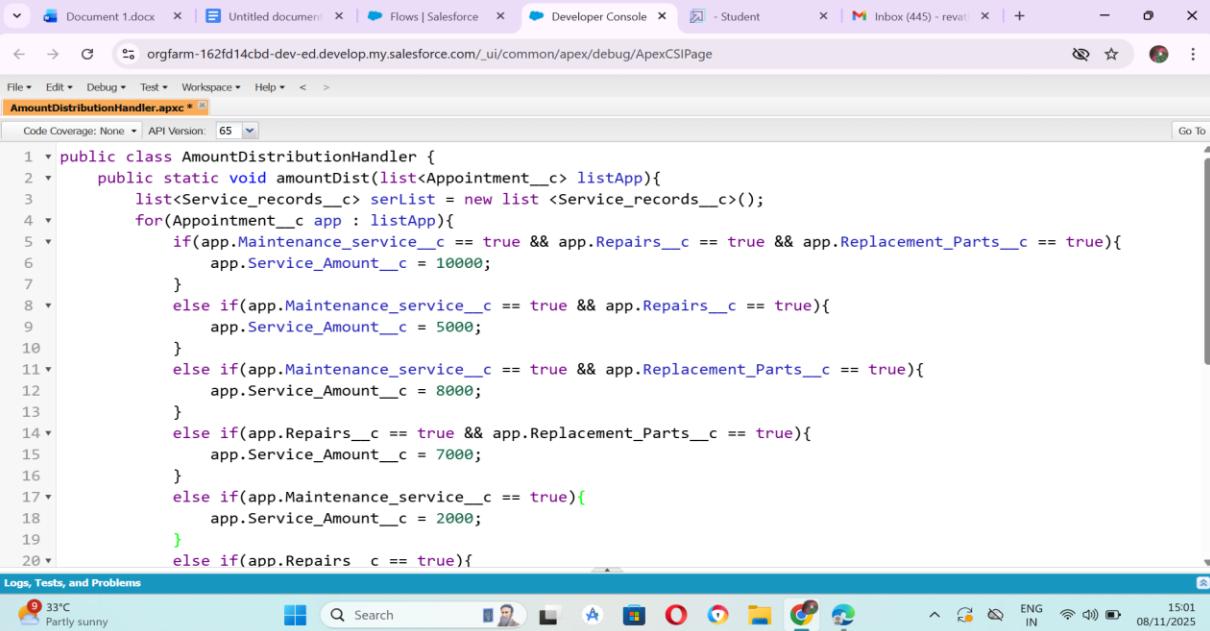
Before Trigger: This type of trigger in Salesforce is used either to update or validate the values of a record before they can be saved into the database. So, basically, the before trigger validates the record first and then saves it. Some criteria or code can be set to check data before it gets ready 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.

Activity 1:Apex handler

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

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



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

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){
            }
        }
    }
}
```

```

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

}
}
}

```

Trigger Handler :

How to create a new trigger :

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

Syntax For creating trigger :

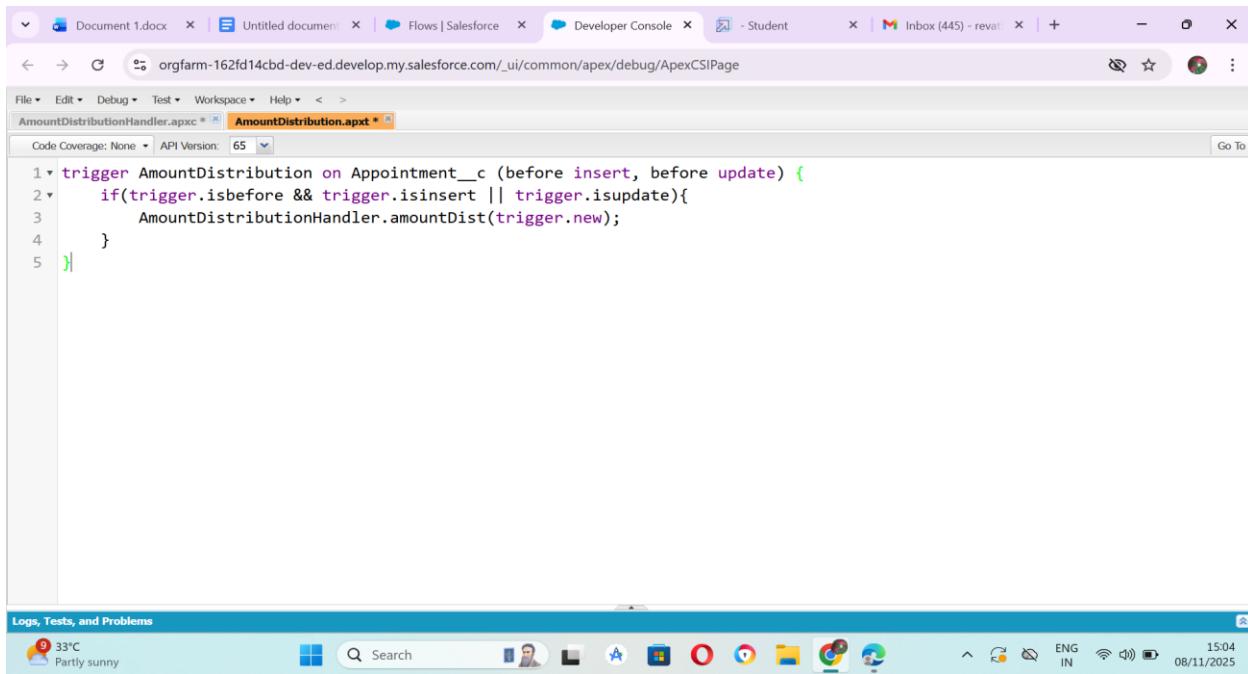
The syntax for creating trigger is :

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

```
{
}
```

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

1. Handler for the Appointment Object



The screenshot shows a Salesforce developer console window. The title bar includes tabs for 'Document 1.docx', 'Untitled document', 'Flows | Salesforce', 'Developer Console', and 'Inbox (445) - revai'. The main area displays the Apex trigger code:

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

The code is written in Apex, defining a trigger on the 'Appointment__c' object. It checks if the trigger is before insert or update, and if so, calls the 'amountDist' method from the 'AmountDistributionHandler' class on the new records.

Code:

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

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

    }
}
```

Milestone 9:Reports

1. 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,

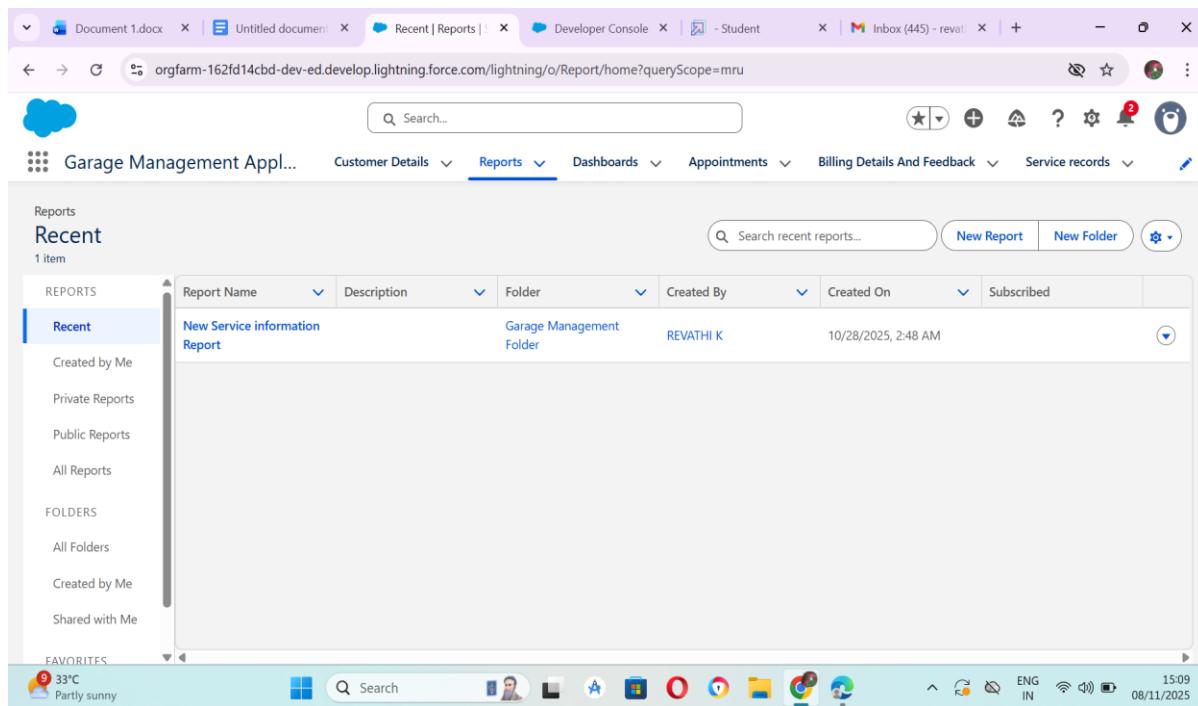
and sharing reports, review these reporting basics.

Types of Reports in Salesforce

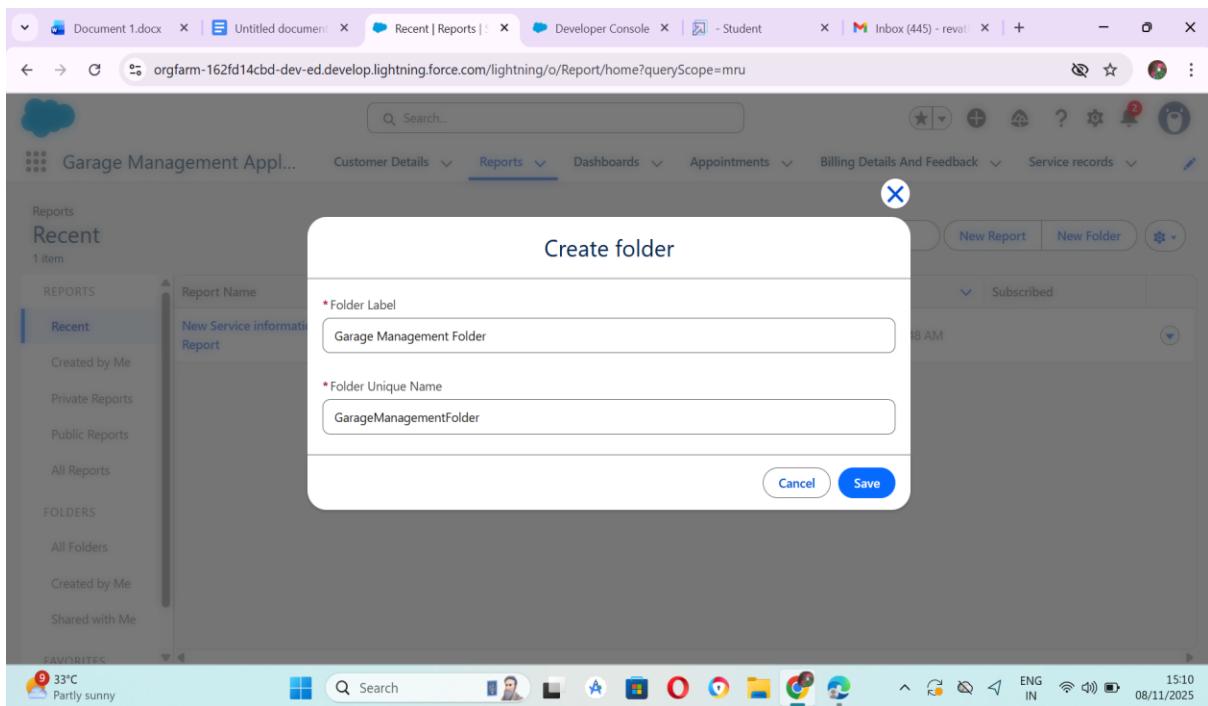
1. Tabular
2. Summary
3. Matrix
4. Joined Reports

Activity 1:create a report folder

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



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



Activity 2:Sharing a report folder

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

Activity 3:Create Report Type

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

Custom Report Type

All Custom Report Types

Label	Name	Description	Category	Created Date
Orchestration Run Logs Spring '24	flow_orchestration_log_oottb_crt_two_four_eight	Find out which orchestration run logs were created and what ...	Other Repor... autoproc	10/22/2025, 8:11 A...
Orchestration Runs Spring '24	flow_orchestration_run_oottb_crt_two_four_eight	Find out which orchestration runs were created.	Other Repor... autoproc	10/22/2025, 8:11 A...
Orchestration Stage Runs Spring '24	flow_orchestration_stage_run_oottb_crt_two_four_eight	Find out which orchestration stage runs were created and the ...	Other Repor... autoproc	10/22/2025, 8:11 A...
Orchestration Step Runs Spring '24	flow_orchestration_step_run_oottb_crt_two_four_eight	Find out which orchestration step runs were created and the c...	Other Repor... autoproc	10/22/2025, 8:11 A...
Orchestration Work Items Spring '...	flow_orchestration_work_item_oottb_crt_two_four_eig...	Find out which orchestration work items were created, who's t...	Other Repor... autoproc	10/22/2025, 8:11 A...
Program Definition Spring '24	Program_Definition_sfcdSESV60	Review your analytics with a program-like structure. See each ...	Other Repor... autoproc	10/22/2025, 8:11 A...
Program Definition Summer '24	Program_Definition_sfcdSESV61	Review your analytics with a program-like structure. See each ...	Other Repor... autoproc	10/22/2025, 8:11 A...
Program Item Progress Spring '24	Program_Task_Progress_sfcdSESV60	Report on tasks like exercises, milestones, and outcomes progr...	Other Repor... autoproc	10/22/2025, 8:11 A...
Program Item Progress Summer '24	Program_Task_Progress_sfcdSESV61	Report on tasks like exercises, milestones, and outcomes progr...	Other Repor... autoproc	10/22/2025, 8:11 A...
Program Progress Spring '24	Program_Progress_sfcdSESV60	Report on program progress. Specific progress on milestones ...	Other Repor... autoproc	10/22/2025, 8:11 A...
Program Progress Summer '24	Program_Progress_sfcdSESV61	Report on program progress. Specific progress on milestones ...	Other Repor... autoproc	10/22/2025, 8:11 A...
Screen Flows	screen_flows_prebuilt_crt	Find out which flows get executed and how long users take to ...	Other Repor... autoproc	10/22/2025, 8:11 A...
Service information	Service_information	Description will be visible to users who create reports.	Other Repor... rev	10/28/2025, 2:42 A...

3. Select the Primary object as “ Customer details” .
4. Give the Report type Label as “ Service information ”
5. Report type Name is autopopulated.
6. Keep the Description as same.
7. Select Store in Category as “ other Reports ”
8. Select the deployment status as “ Deployed ”, click on Next.

Service information

Service_information

Description

Enter description...

Note: Description will be visible to users who create reports.

Store in Category

Other Reports

Status

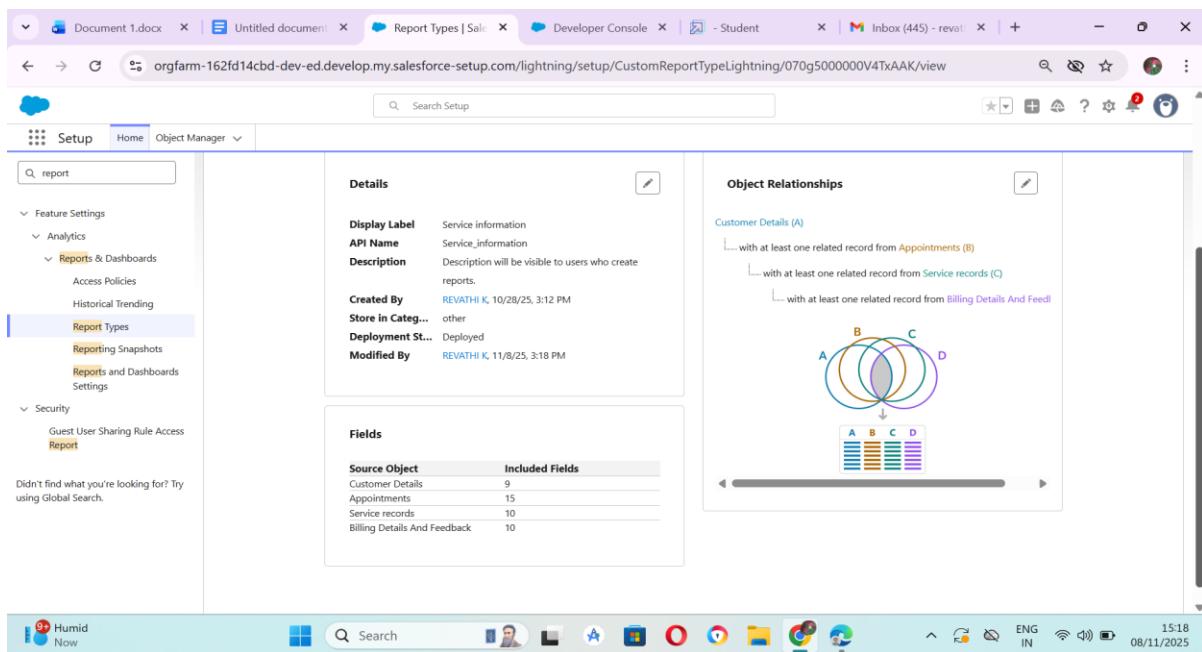
In Development

Deployed

Cancel

Next

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



Activity 4:Create Report

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

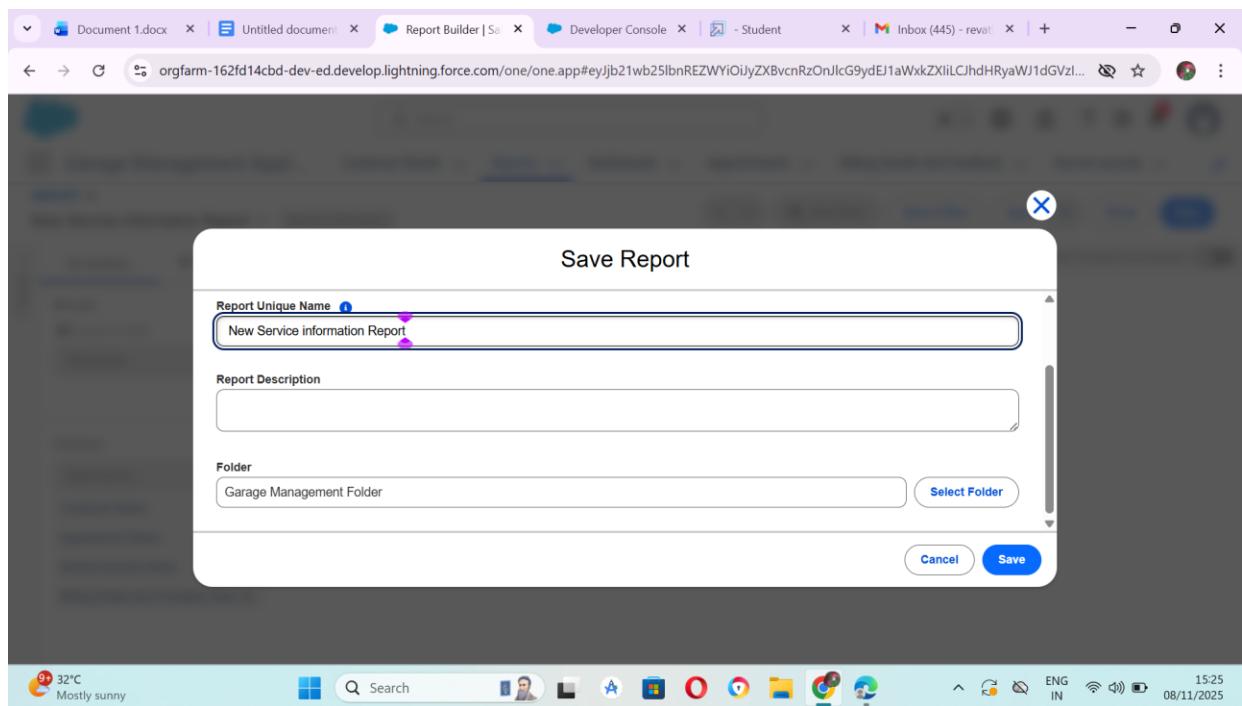
1. Go to the app >> click on the reports tab
2. Click New Report.

The screenshot shows the 'Garage Management Appl...' section of a web application. The 'Reports' tab is selected. On the left, a sidebar lists categories: 'RECENT' (Recent, Created by Me, Private Reports, Public Reports, All Reports), 'FOLDERS' (All Folders, Created by Me, Shared with Me), and 'FAVORITES'. The main area displays a table of recent reports. One report is highlighted: 'New Service information Report' under the 'Recent' category. The table columns include Report Name, Description, Folder, Created By, Created On, and Subscribed.

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

The screenshot shows the 'Report Builder | Service Information' screen. A modal dialog titled 'Create Report' is open. On the left, a sidebar shows 'Recently Used' categories: All, Accounts & Contacts, Opportunities, Customer Support Reports, Leads, Campaigns, Activities, and Contracts and Orders. The main area has a 'Select a Report Type' section with a search bar and a table of recently used report types. One entry is selected: 'Service information' under the 'Custom' category. To the right, a 'Details' panel is expanded, showing the report type name 'Service information', its category 'Custom', and a description: 'Description will be visible to users who create reports.' A 'Start Report' button is also visible in this panel.

4. Their outline pane is opened already, select the fields that mentioned below in column section.
 - a. Customer name
 - b. Appointment Date
 - c. Service Status
 - d. Payment paid
5. Remove the unnecessary fields.
6. Select the fields that mentioned below in GROUP ROWS section.
 - a. Rating for Service
7. Select the fields that mentioned below in GROUP ROWS section.
 - a. 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 populated.
11. Select the folder the created and Click on save.



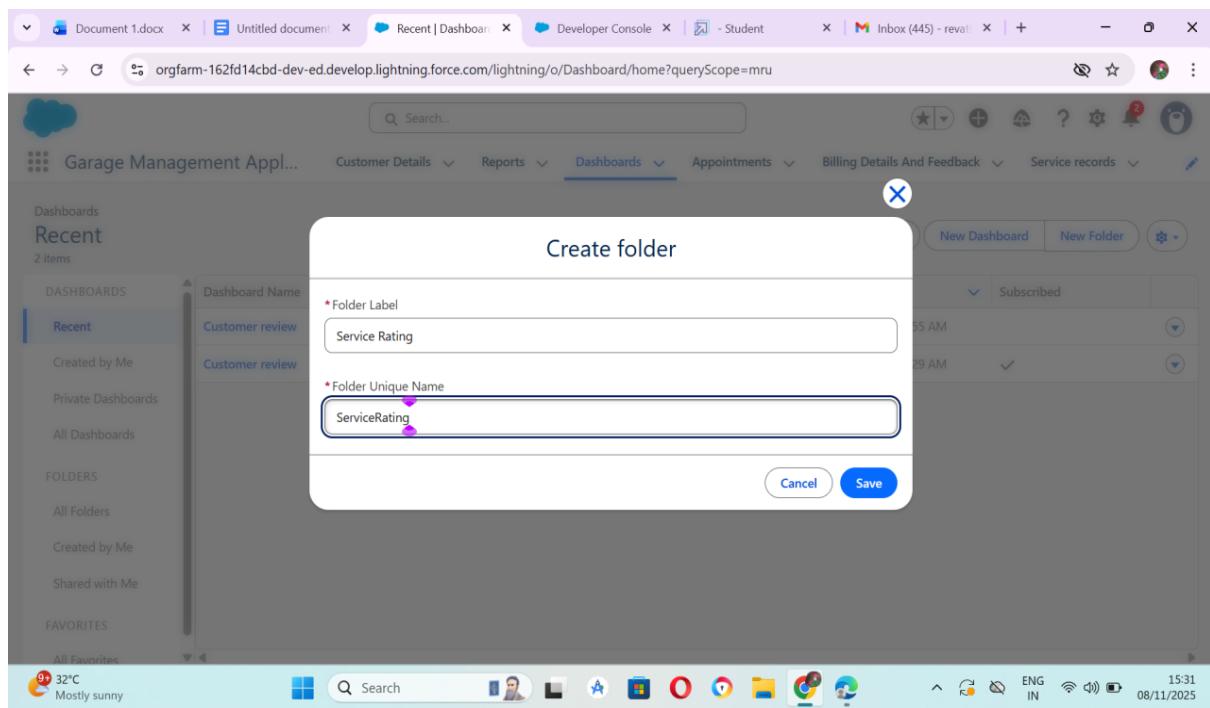
Milestone 10:Dashboards

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.

Activity 1:Create Dashboard Folder

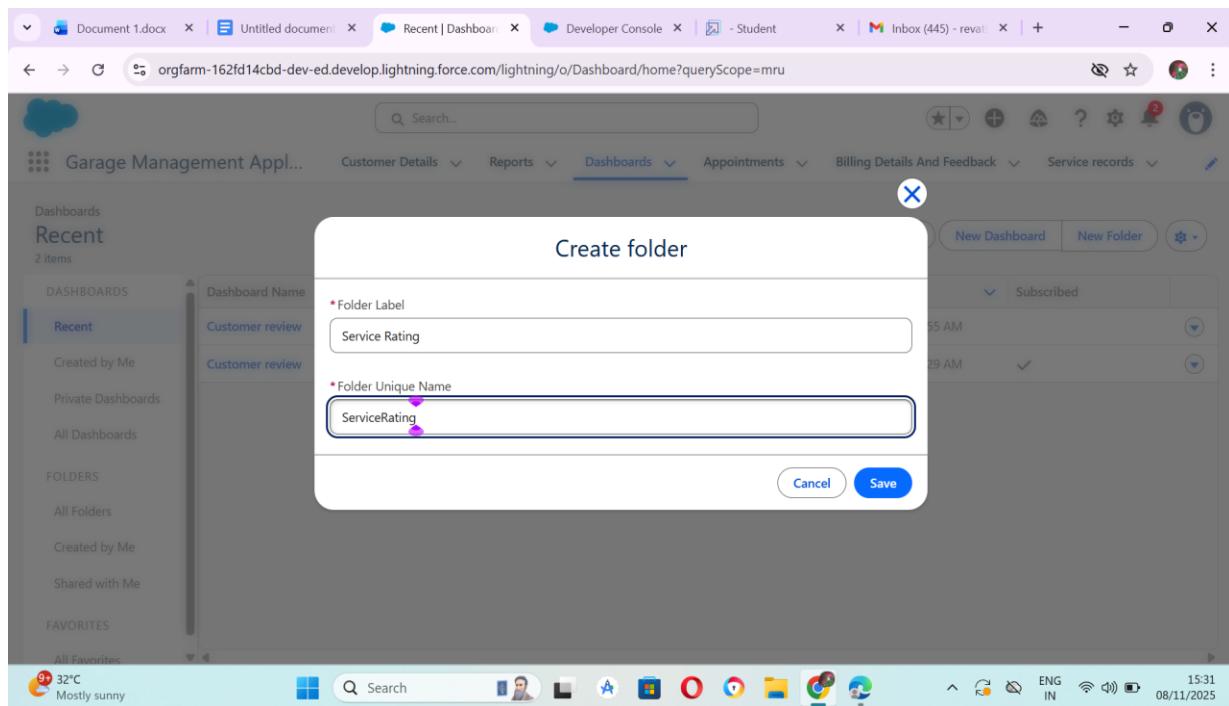
1. Click on the app launcher and search for dashboard.
2. Click on dashboard tab.
3. Click new folder, give the folder label as “ Service Rating dashboard”.
4. Folder unique name will be auto populated.
5. Click save.



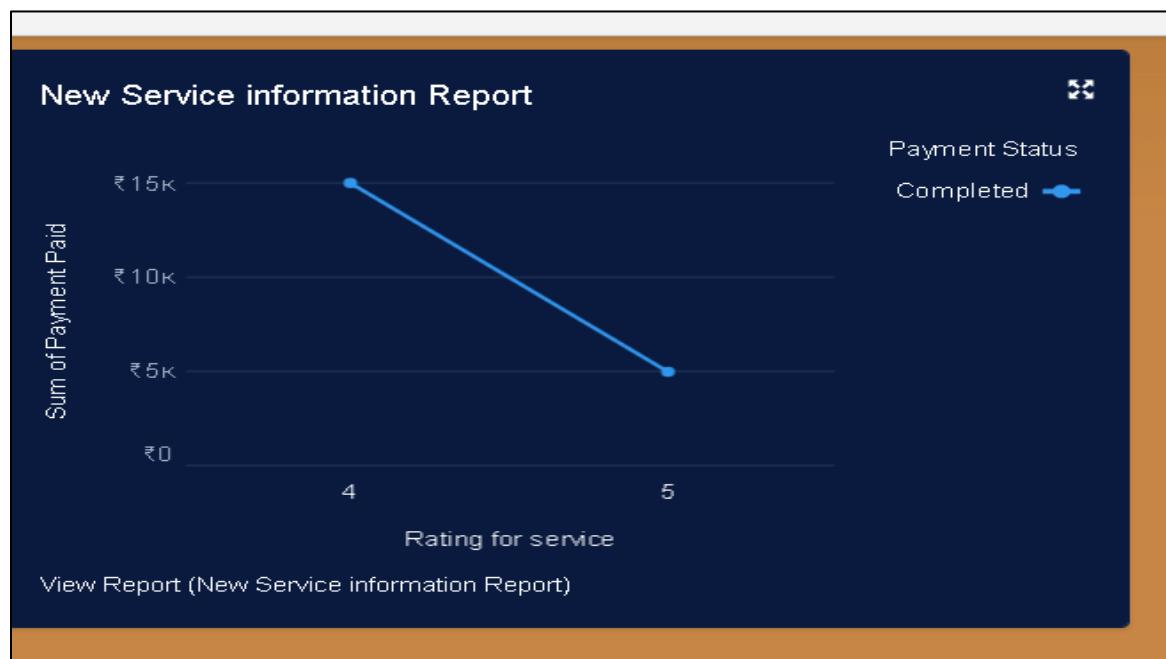
6. Follow the same steps, from Reports Milestone and Activity 2, and provide the sharing settings for the folder that was just created.

Activity 2: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.



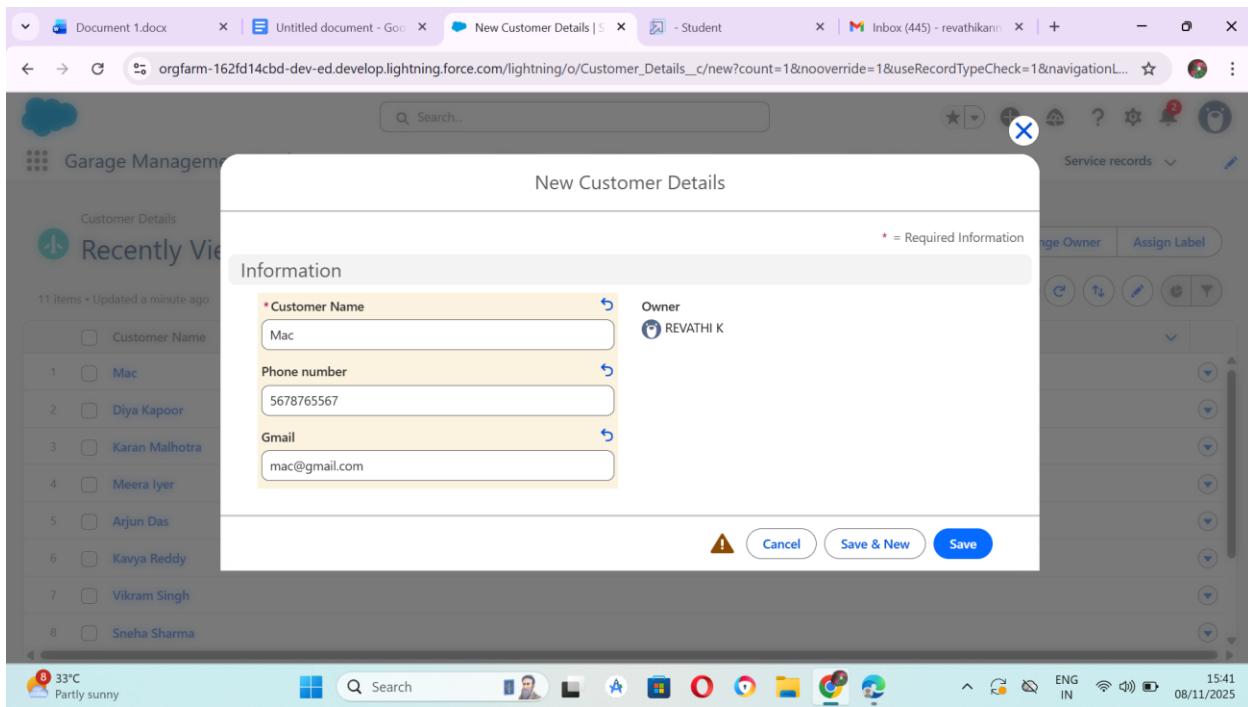
8. After that Click on Subscribe on top right.
9. Set the Frequency as “ weekly ”.
10. Set a day as monday.
11. And Click on save.

Milestone 11:User Adoption

Activity 1:creating records

To create a record in the follow objects follow these steps

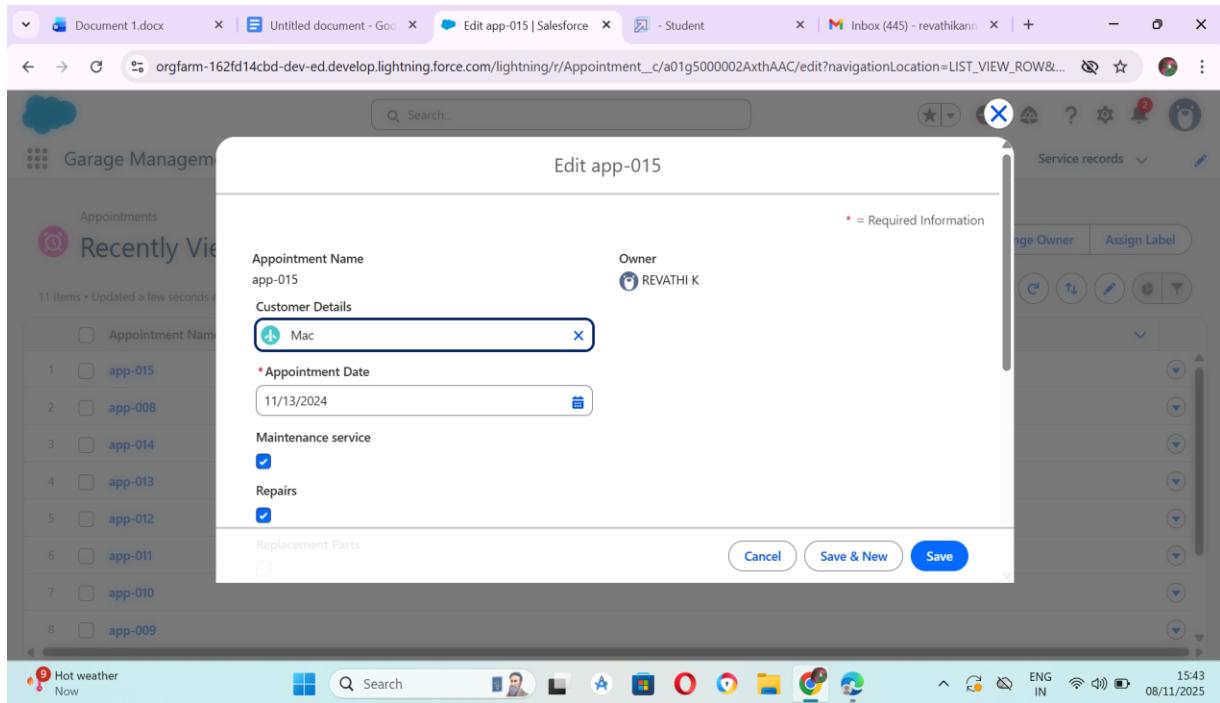
1. Click on the app launcher located at the left side of the screen.
2. Search for “ **Garage Management** ” and click on it.
3. Click on the “ **Consumer details** tab”.
4. Click on new and fill the details as shown below figs, and click save.



Now, Create the Appointment Record

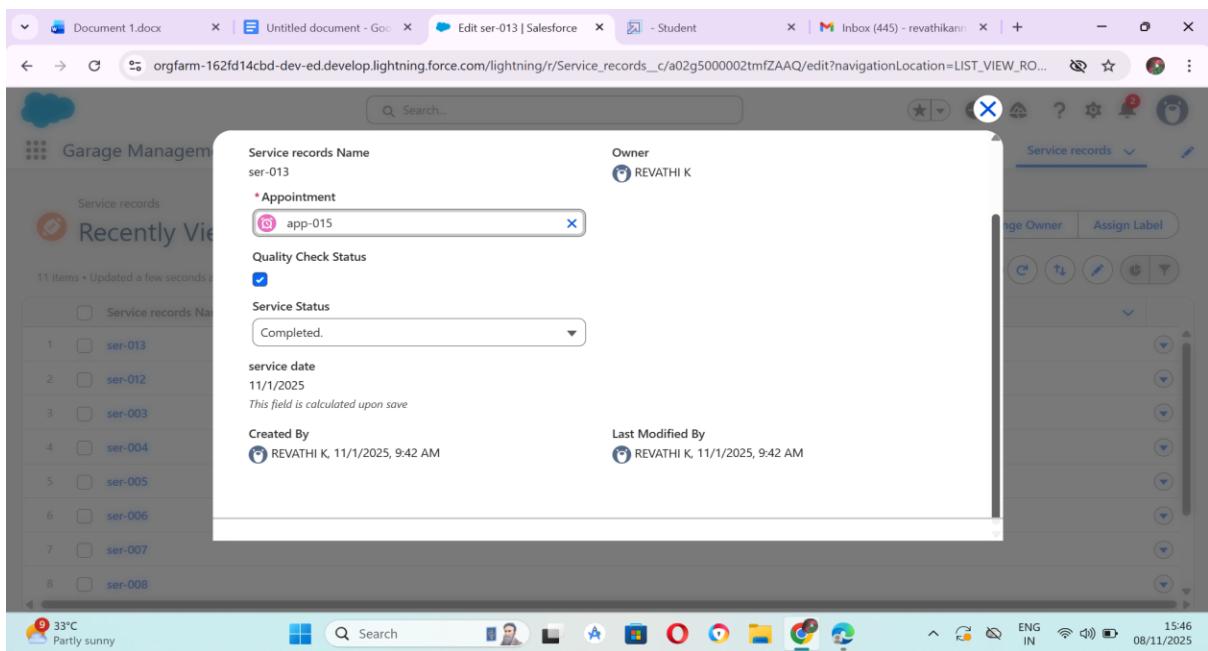
1. Click on the “ **Appointment** tab”.
2. Enter the customer details as created, while entering Appointment Date enter the date less than the created date.

3. Match the validation while entering the vehicle number plate.
4. Select the services you need.
5. Click on save to see the Service Amount.



Now, Create a service Record

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



4. Open the record and click on Quality check status as true.
5. Click on save.
6. Now automatically Service status will be moved to completed.