

# GARAGE MANAGEMENT SYSTEM

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## PROJECT OVERVIEW – GARAGE MANAGEMENT SYSTEM

### 1. Project Title

Garage Management System (GMS)

### 2. Project Objective

The objective of this project is to design and implement a system that streamlines daily garage operations. It helps manage customer details, vehicle records, service bookings,

spare parts inventory, billing, and employee tasks, ensuring efficiency, accuracy, and better customer satisfaction.

### **3. Project Scope**

The system will:

- Store customer and vehicle details in a centralized database.
- Allow booking of vehicle servicing and repairs.
- Track the status of vehicles (in-progress, completed, delivered).
- Manage spare parts inventory (stock availability, usage, reordering).
- Generate invoices and maintain payment records.
- Provide reporting and analytics (e.g., revenue, most-used services, pending jobs).

### **4. Key Features**

- **Customer Management** – Add/update customer details and history.
- **Vehicle Management** – Record vehicle details (type, model, registration number, etc.).
- **Service Management** – Schedule and track service/repair jobs.
- **Inventory Management** – Maintain stock of spare parts and consumables.
- **Billing System** – Auto-generate bills and track payments.
- **User Management** – Different access levels (Admin, Mechanic, Receptionist, etc.).
- **Reports & Analytics** – Service history, revenue reports, parts usage, etc.

### **5. Users of the System**

- **Garage Owner / Admin** – Full access and management.
- **Mechanics / Technicians** – Access assigned service jobs and update status.
- **Receptionist / Front Desk Staff** – Manage bookings, customer communication, and billing.
- **Customers (optional via portal/mobile app)** – Book services and check status.

### **6. Benefits**

- Streamlined garage operations with reduced manual paperwork.

- Faster service booking and processing.
- Accurate billing and inventory control.
- Improved customer experience and trust.
- Data-driven decision making through reports.

## 7. Technology Stack (example)

- **Frontend:** HTML, CSS, JavaScript / React
- **Backend:** Java / Python / Node.js / PHP
- **Database:** MySQL / PostgreSQL / MongoDB
- **Deployment:** Cloud or On-premises
- **Optional:** Mobile App (Android/iOS)

## 8. Deliverables

- A functional Garage Management System application.
- User documentation and training guide.
- Test cases and reports.
- Deployment and maintenance plan.

## MILESTONE 1: SALESFORCE

### 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:

**Build enterprise-quality apps fast to bring your ideas to life**

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

**Sign up for your Salesforce Developer Edition**  
A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name\*

Last Name\*

Email\*

Role\*

Company\*

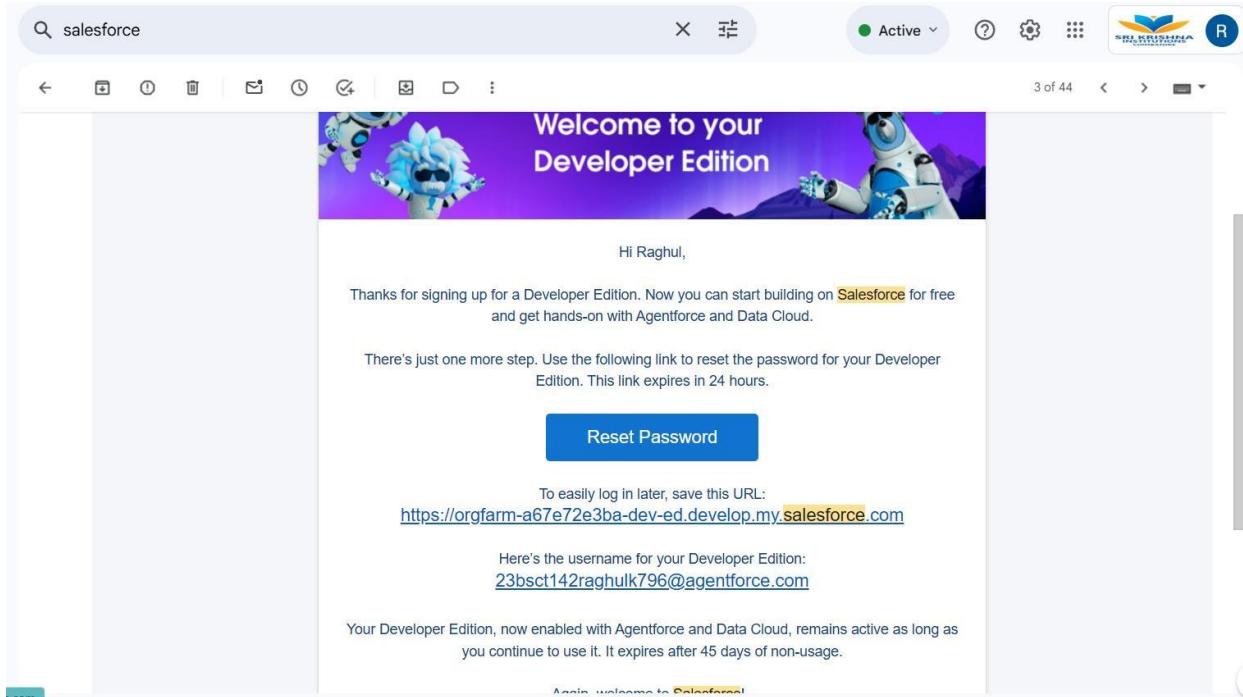
1. First name & Last name
2. Email
3. Role: Developer
4. Company: College Name
5. County: India
6. Postal Code: pin code
7. Username: should be a combination of your name and company

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.

## Change Your Password

Enter a new password for **lead@sb.oom**.  
Make sure to include at least:

- ✓ 8 characters
- ✓ 1 letter
- ✓ 1 number

\* New Password  
 Good

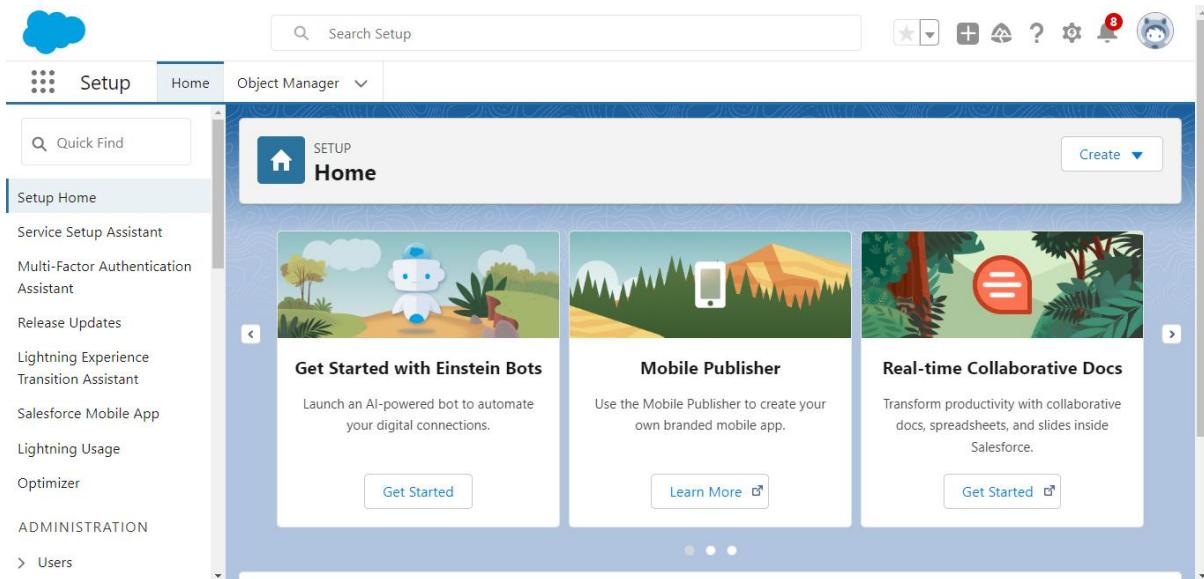
\* Confirm New Password  
 Match

Security Question  
▼ In what city were you born?

\* Answer  
 asdfghjkl

**Change Password**

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



The screenshot shows the Salesforce Setup Home page. The left sidebar includes links for Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration (with a sub-link for Users). The main content area features a "SETUP Home" header with a "Create" button. Below it are three cards: "Get Started with Einstein Bots" (illustrated with a white robot icon), "Mobile Publisher" (illustrated with a smartphone icon), and "Real-time Collaborative Docs" (illustrated with a document icon). Each card has a "Get Started" button.

## MILESTONE 2: OBJECT

### ***ACTIVITY 1: Create Customer Details Object***

To create an object:

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

### ***ACTIVITY 2: Create Appointment Object***

To create an object:

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

### **ACTIVITY 3: CREATE SERVICE RECORD OBJECT**

To create an object:

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

### **ACTIVITY 4: Create Billing details and feedback Object**

To create an object:

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

# MILESTONE 3: TABS

## 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)

The screenshot shows the Salesforce Setup interface with the 'Custom Tabs' page open. The top navigation bar has 'Setup' selected. Below it, the 'Tabs' tab is highlighted with a red box. In the center, there's a search bar with 'Tabs' typed in, also highlighted with a red box. To the right of the search bar is a 'SEARCH' button. Below the search area, there's a section titled 'Custom Tabs' with a brief description. A table lists various custom tabs, each with a 'Actions' column containing 'Edit', 'Delete', and 'Clone' buttons. The 'Tab Style' column shows icons for 'Deck', 'Anytime', 'Cherry pie', 'Jewel', 'Anytime', 'Phone', 'Comments', 'Deck', 'Computer', 'Deck', 'Highway Sign', 'Highway Sign', and 'Anytime'. The 'Description' column provides details about each tab. At the bottom right of the table, there's a 'New' button highlighted with a red box.

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.

The screenshot shows the 'New Custom Object Tab' wizard, Step 1 of 3. The title bar says 'New Custom Object Tab' and 'Step 1 of 3'. The main area is titled 'Step 1. Enter the Details' with a sub-instruction 'Choose the custom object for this new custom tab. Fill in other details.' Below this, there's a section to 'Select an existing custom object or create a new custom object now.' The 'Object' dropdown is set to 'Customer Details'. The 'Tab Style' dropdown is set to 'Deck'. There's an optional section for a 'Splash Page Custom Link' which is currently set to 'None'. At the bottom, there's a 'Description' text area with placeholder text 'Enter a short description.' and a 'Next' button at the bottom right.

**Tab Style Selector**

**Create your own style**

Hide styles which are used on other tabs

	Airplane		Alarm clock		Apple		Balls
	Bank[1]		Bell		Big top		Boat[1]
	Books		Bottle		Box		Bridge
	Building		Building Block		Caduceus		Camera
	Can		Car		Castle		CD/DVD
	Cell phone		Chalkboard		Chess piece		Chip
	Circle		Compass		Computer		Credit card
	CRT TV		Cup		Desk[1]		Diamond
	Dice		Factory		Fan		Flag
	Form		Gears		Globe		Guitar
	Hammer		Hands		Handsaw		Headset
	Heart[1]		Helicopter		Hexagon		Highway Sign
	Hot Air Balloon		Insect		IP Phone		Jewel
	Keys		Laptop		Leaf		Lightning

**Save** **Cancel**

**Step 3. Add to Custom Apps**

Step 3 of 3

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	<input type="checkbox"/> Include Tab
Platform (standard_Platform)	<input type="checkbox"/>
Sales (standard_Sales)	<input type="checkbox"/>
Service (standard_Service)	<input type="checkbox"/>
Marketing (standard_Marketing)	<input type="checkbox"/>
Sample Console (standard_ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>

Analytics Studio (standard_Insights)	<input type="checkbox"/>
Sales Console (standard_LightningSalesConsole)	<input type="checkbox"/>
Service Console (standard_LightningService)	<input type="checkbox"/>
Sales (standard_LightningSales)	<input type="checkbox"/>
Lightning Usage App (standard_LightningInstrumentation)	<input type="checkbox"/>
Digital Experiences (standard_SalesforceCMS)	<input type="checkbox"/>
Queue Management (standard_QueueManagement)	<input type="checkbox"/>
Bot Solutions (standard_LightningBot)	<input type="checkbox"/>
Data Manager (standard_DataManager)	<input type="checkbox"/>
Salesforce Scheduler Setup (standard_LightningScheduler)	<input type="checkbox"/>

Append tab to users' existing personal customizations

**Previous** **Save** **Cancel**

## ACTIVITY 2: CREATING REMAINING TABS

1. Now create the Tabs for the remaining Objects, they are “Appointments, Service records, Billing details and feedback”.
2. Follow the same steps as mentioned in Activity -1.

## MILESTONE 4: THE LIGHTING APP

### ACTIVITY 1: CREATE A LIGHTING 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. At the top, there is a search bar with the placeholder "Search Setup". Below the search bar, there are tabs for "Setup", "Home", and "Object Manager". A red box highlights the "Setup" tab. In the center, there is a section titled "Lightning Experience App Manager" with a sub-section "Clone Apps(Beta)". A red arrow points to the "New Lightning App" button, which is located at the top right of this section. Another red box highlights the "New Connected App" button. On the left side, there is a sidebar with sections for "Q: app manager" and "v: Apps", with a red box highlighting the "Apps" section. At the bottom, there is a table titled "35 items > Sorted by App Name > Filtered by All appmenutabs > Tablet Type". The table has columns for "App Name", "Developer Name", "Description", "Last Modified", "App Type", and "V...". The first few rows of the table are as follows:

App Name	Developer Name	Description	Last Modified	App Type	V...
1 All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic	✓
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	04/12/2022, 10:13 am	Classic	✓
4 B2B Solutions	LightningB2B	Discover and manage business solutions designed for your industry	04/12/2022, 10:16 am	Lightning	✓
5 Chatter Desktop	Chatter/Desktop	Chatter Desktop is an Adobe AIR-based desktop application that lets Chatter users stay connected...	29/12/2022, 4:04 pm	Connected (Varaged)	✓
6 Chatter Mobile for BlackBerry...	Chatter/or BlackBerry	The Salesforce.com Chatter Mobile app lets you access Chatter data on the go. Use it to view fe...	29/12/2022, 4:05 pm	Connected (Varaged)	✓
7 College Management System	Nadeem	demo app	08/12/2022, 4:18 pm	Lightning	✓
8 Community	Community	Salesforce CRM Communities	04/12/2022, 10:13 am	Classic	✓
9 Content	Content	Salesforce CRM Content	04/12/2022, 10:13 am	Classic	✓
10 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes	04/12/2022, 10:13 am	Lightning	✓

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.

New Lightning App

### App Details & Branding

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

<b>App Details</b>	<b>App Branding</b>
* App Name <input type="text" value="Name your app..."/> * Developer Name <input type="text" value="Enter a developer name..."/> Description <input type="text" value="Enter a description..."/>	Image <input type="file"/> Primary Color Hex Value <input type="color" value="#0070D2"/> <input type="checkbox"/> Use the app's image and color instead of the org's custom theme
<b>App Launcher Preview</b>	

Next

3. To Add Navigation Items:

New Lightning App

### Navigation Items

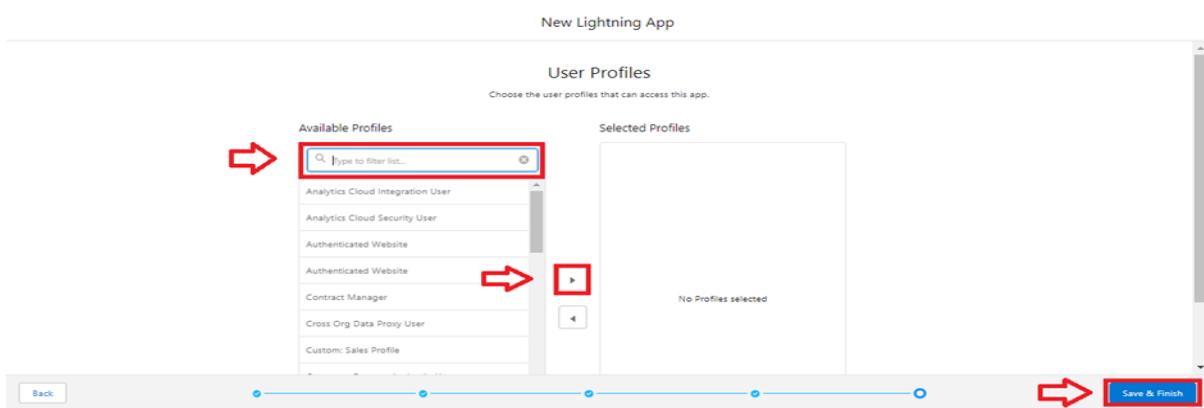
Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from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

<b>Available Items</b>	<b>Selected Items</b>
Accounts Activities Alert Settings All Sites Alternative Payment Methods App Launcher Appointment Invitations	No items selected

Back      Next

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

5. To Add User Profiles:



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

## MILESTONE 5: FIELDS

### 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.

Object Manager					
LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Customer	Customer	Standard Object			
Customer Details	Customer_Details__c	Custom Object		05/10/2023	✓

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

Customer1

**Fields & Relationships**

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
current Status	current_Status__c	Picklist		
Customer Name	Name	Text(80)		✓
Email id	Email_id__c	Email (Unique)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Permanent Address	Permanent_Address__c	Text Area(255)		
Phone no	Phone_no__c	Phone		

### 3. Select Data Type as a “Phone”

**Fields & Relationships**

- Currency
- Date
- Date/Time
- Email
- Geolocation
- Number
- Percent
- Phone
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted) (1)
- Time
- URL

### 4. Click on next.

The screenshot shows the 'Custom Field Definition Edit' page for a 'Customer' object. The 'Field Label' is set to 'Phone no' and the 'Field Name' is 'Phone\_no'. The 'Data Type' is 'Phone'. The 'General Options' section includes a checked checkbox for 'Always require a value in this field in order to save a record'. The 'Save' button is highlighted with a red box.

## 5. Fill the Above as following:

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

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

## 2. To create another fields in an object:

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

## ACTIVITY 2: Creation of Lookup Fields

### Creation of Lookup Field on Appointment Object:

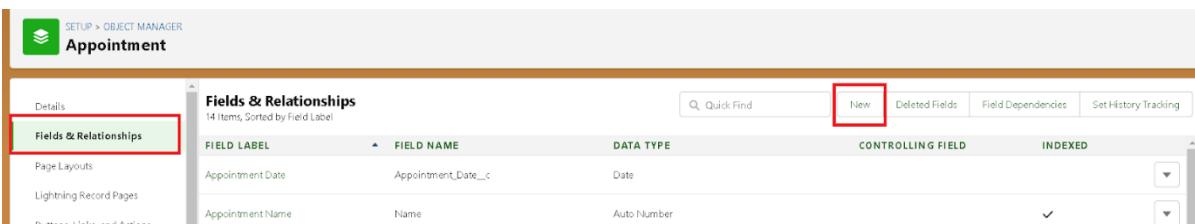
1. Go to setup >> click on Object Manager >> type object name (Appointment) in the search bar >> click on the object.



The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'app'. Below the search bar are buttons for 'Schema Builder' and 'Create'. The main area displays a table with columns: 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', 'LAST MODIFIED', and 'DEPLOYED'. There are five rows in the table:

- Appointment: API Name 'Appointment\_c', Type 'Custom Object', Last Modified '24/08/2023'.
- Appointment Category: API Name 'AppointmentCategory'.
- Appointment Invitation: API Name 'AppointmentInvitation'.
- Appointment Invitee: API Name 'AppointmentInvitee'.

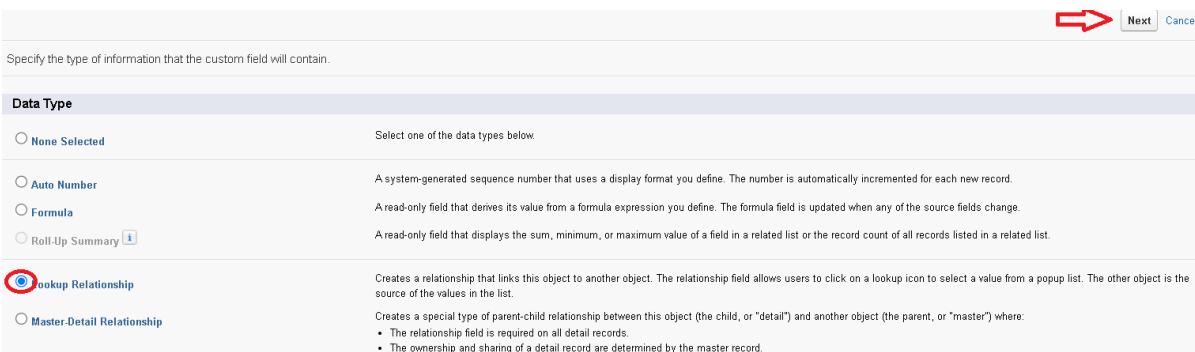
2. Now click on “Fields & Relationships” >> New



The screenshot shows the 'Fields & Relationships' page for the Appointment object. The top navigation bar shows 'SETUP > OBJECT MANAGER' and the object name 'Appointment'. On the left, there are tabs for 'Details', 'Fields & Relationships' (which is highlighted with a red box), 'Page Layouts', and 'Lightning Record Pages'. The main area has a table with columns: 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. Two fields are listed:

- Appointment Date: Field Label 'Appointment Date', Field Name 'Appointment\_Date\_c', Data Type 'Date'.
- Appointment Name: Field Label 'Appointment Name', Field Name 'Name', Data Type 'Auto Number'.

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



The screenshot shows the 'Data Type' configuration screen. At the top, there is a note: 'Specify the type of information that the custom field will contain.' To the right, there is a 'Next' button with a red arrow pointing to it. The main area is titled 'Data Type' and contains several options:

- None Selected: 'Select one of the data types below.'
- Auto Number: 'A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.'
- Formula: 'A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.'
- Roll-Up Summary: 'A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.'
- Lookup Relationship: 'Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.' This option is circled with a red circle.
- Master-Detail Relationship: 'Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
  - The relationship field is required on all detail records.
  - The ownership and sharing of a detail record are determined by the master record.

4. Select the related object “Customer Details” and click next.

5. Next >> Next >> Save.

**Note: Make sure you complete Activity 4 Before continuing.**

### Creation of Lookup Field on Service records Object:

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

3. Select “Look-up relationship” as data type and click Next.
4. Select the related object “Appointment” and click next.
5. Make it a required field so click on Required.

**Lookup Options**

Related To: Appointment

Child Relationship Name: Service\_records

Related List Label: Service records

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

What to do if the lookup record is deleted?

- Clear the value of this field. You can't choose this option if you make this field required.
- Don't allow deletion of the lookup record that's part of a lookup relationship.

6. Scroll down for Lookup Filter and click on Show filter settings.
7. Now add the filter criteria.
8. Field: Appointment: Appointment Date >> Operator: less than >> select field >> Appointment: Created Date
9. Filter type should be Required.

**Lookup Filter**

Optional, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

[Hide Filter Settings](#)

Filter Criteria [Insert Suggested Criteria](#)

Field	Operator	Value / Field
Appointment: Appointment Date	less than	Field: Appointment: Created Date

Add [Begin typing to search for a field...](#) [None](#) [Value](#) [Clear](#)

[Add Filter Logic...](#)

Filter Type  **Required.** The user-entered value must match filter criteria.  
If it doesn't, display this error message on save:  
*Value does not exist or does not match filter criteria.*

**Optional.** The user can remove the filter or enter values that don't match criteria.

Lookup Window Text Add this informational message to the lookup window.

Active  Enable this filter.

[Change Field Type](#) [Save](#) [Cancel](#)

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

### Creation of Lookup Field on Billing details and feedback Object:

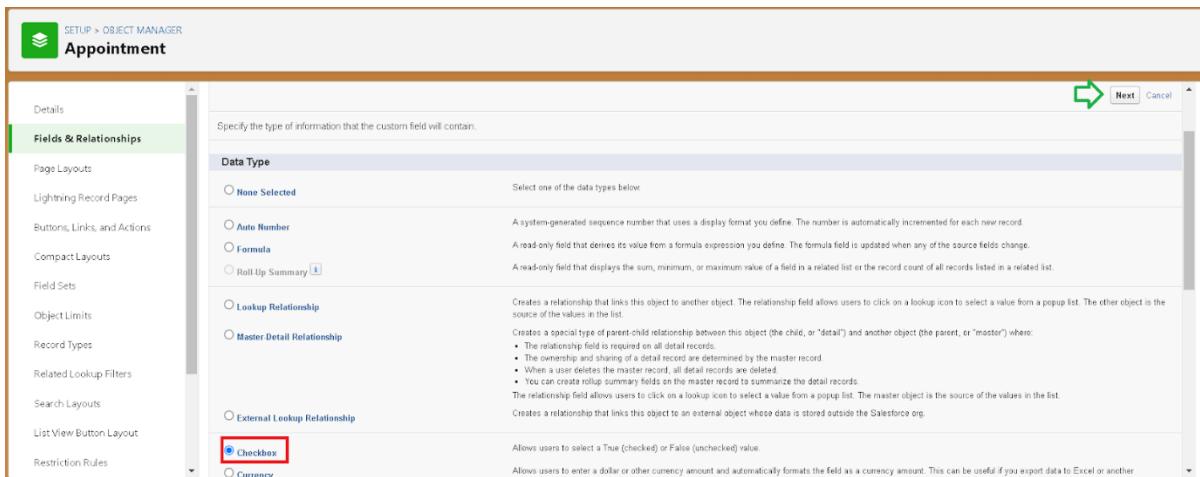
1. Go to setup >> click on Object Manager >> type object name (Billing details and feedback) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.

3. Select “Look-up relationship” as data type and click Next.
4. Select the related object “Service records” and click next.
5. Next >> Next >> Save & new.

### **ACTIVITY 3: Creation of Checkbox Fields**

#### **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.



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

Appointment  
New Custom Field

Help for this Page 

Step 2. Enter the details Step 2 of 4

Field Label  

Default Value  Checked  Unchecked 

Field Name  

Description 

Help Text 

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

Previous Next Cancel 

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

#### **Creation of Another Checkbox Field on Appointment Object:**

1. Repeat the steps form 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.

#### **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**

##### **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 populated
6. Make it as a Required field by click on the Required option.
7. Click on next >> next >> save.

Appointment  
New Custom Field

Step 2. Enter the details Step 2 of 4

Help for this Page ?

Previous Next Cancel

Field Label	Appointment Date	
Field Name	Appointment_Date	
Description	<input type="text"/>	
Help Text	<input type="text"/>	
Required	<input checked="" type="checkbox"/> Always require a value in this field in order to save a record	
Auto add to custom report type	<input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity	
Default Value	<input type="text"/> Show Formula Editor	

#### **ACTIVITY 5: 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 populated

Step 2. Enter the details

Field Label  [i](#)

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to \*12345678.90\*.

Length  Number of digits to the left of the decimal point

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

Field Name  [i](#)

Description

Help Text

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

Auto add to custom report type  Add this field to existing custom report types that contain this entity [i](#)

6. Click on next

7. Give read only for all the profiles in field level security for profile.

Appointment  
New Custom Field

Step 3. Establish field-level security

Field Label Service Amounts  
Data Type Currency  
Field Name Service\_Amounts  
Description

Select the profiles to which you want to grant edit access to this field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

8. Click on next > > save.

### Creation of Currency Field on Billing details and feedback Object:

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

## ACTIVITY 6: Creation of Text Fields

1. Go to setup >> click on Object Manager >> type object name (Appointment) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select “Text” as data type and click Next.
4. Give the Field Label: Vehicle number plate
5. Field Name: is auto populated
6. Length: 10
7. Make field as Required and Unique.

The screenshot shows the 'Step 2. Enter the details' screen for creating a new text field. The field label is set to 'Vehicle number plate'. The length is specified as 10. The field name is 'Vehicle\_number\_plate'. There is no description or help text provided. Under the 'Required' section, the checkbox 'Always require a value in this field in order to save a record' is checked. Under 'Unique', there are two options: 'Do not allow duplicate values' (selected) and 'Treat "ABC" and "abc" as different values (case insensitive)' (unchecked). Under 'External ID', the checkbox 'Set this field as the unique record identifier from an external system' is unchecked. Under 'Auto add to custom report type', the checkbox 'Add this field to existing custom report types that contain this entity' is checked. Navigation buttons at the top right include 'Previous', 'Next', and 'Cancel'.

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

## Creation of Text Fields in Billing details and feedback object:

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

7. Make field as Required.
8. Click on next >> next >> save

### **ACTIVITY 7: Creation of Picklist Fields**

#### **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.

New Custom Field

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label: Service Status

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

Started  
Completed

Display values alphabetically, not in the order entered  
 Use first value as default value  
 Restrict picklist to the values defined in the value set

Field Name: Service\_Status

Description:

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

#### **Creation of Picklist Fields in Billing details and feedback object:**

1. Go to setup >> click on Object Manager >> type object name (Billing details and feedback) in search bar >> click on the object.
2. Click on fields & relationship >> click on New.
3. Select Data type as “Picklist” and click Next.

4. Enter Field Label as “Payment Status”, under values select “Enter values, with each value separated by a new line” and enter values as shown below.
5. The values are: Pending, Completed.
6. Click Next.
7. Next >> Next >> Save.

### **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.

Step 2. Choose output type

Field Label  Field Name

Auto add to custom report type  Add this field to existing custom report types that contain this entity [\[i\]](#)

Formula Return Type

None Selected      Select one of the data types below

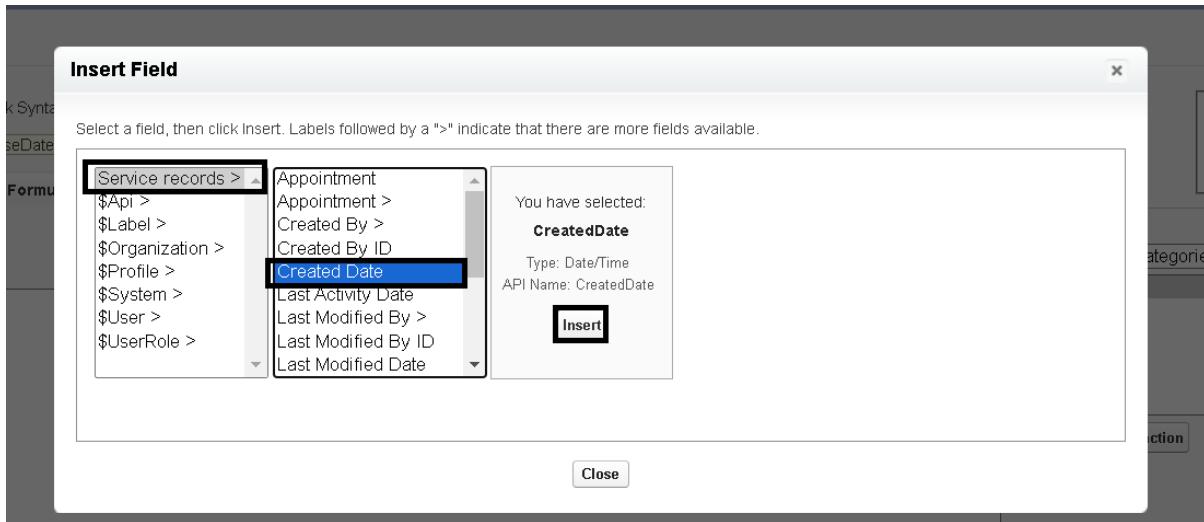
Checkbox      Calculate a boolean value  
Example: `[TODAY() > CloseDate]`

Currency      Calculate a dollar or other currency amount and automatically format the field as a currency amount.  
Example: `[Gross Margin = Amount - Cost_c]`

Date      Calculate a date, for example, by adding or subtracting days to other dates.  
Example: `[Reminder Date = CloseDate - 7]`

Date/Time      Calculate a datetime, for example, by adding a number of hours or days to another datetime.  
Example: `[Next = NOW() + 1]`

5. Insert field formula should be: Created Date



**Step 3. Enter formula** Step 3 of 5

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

**Example:** `Reminder Date = CloseDate - 7` [More Examples...](#)

Simple Formula  Advanced Formula

**Insert Field** **Insert Operator** **Functions**

service dates (Date) = `CreatedDate` ←

**Quick Tips** ↑

- Getting Started
- Operators & Functions

6. click “Check Syntax”.

7. Click next >> next >> Save.

## MILESTONE 5: VALIDATION RULE

### ACTIVITY 1: To create a validation rule to an Appointment Object

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

SETUP > OBJECT MANAGER

## Appointment

**Buttons, Links, and Actions**

- Compact Layouts
- Field Sets
- Object Limits
- Record Types
- Related Lookup Filters
- Search Layouts
- List View Button Layout
- Restriction Rules
- Scoping Rules
- Triggers
- Flow Triggers
- Validation Rules**

Validation Rules	1 Items, Sorted by Rule Name	New		
<b>RULE NAME</b>	<b>ERROR LOCATION</b>	<b>ERROR MESSAGE</b>	<b>ACTIVE</b>	<b>MODIFIED BY</b>
Vehicle	Vehicle number plate	Please enter valid number	✓	project 2, 25/09/2023, 11:56 am

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}"))

**Validation Rule Edit**

Save Save & New Cancel

**Rule Name:** Vehicle

**Active:**

**Description:** vehicle

**Error Condition Formula**

Example: Discount\_Percent\_\_c>0.30 More Examples...

Display an error if Discount is more than 30%

If this formula expression is **true**, display the text defined in the Error Message area

**Functions**

-- All Function Categories --

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

**Insert Field** **Insert Operator**

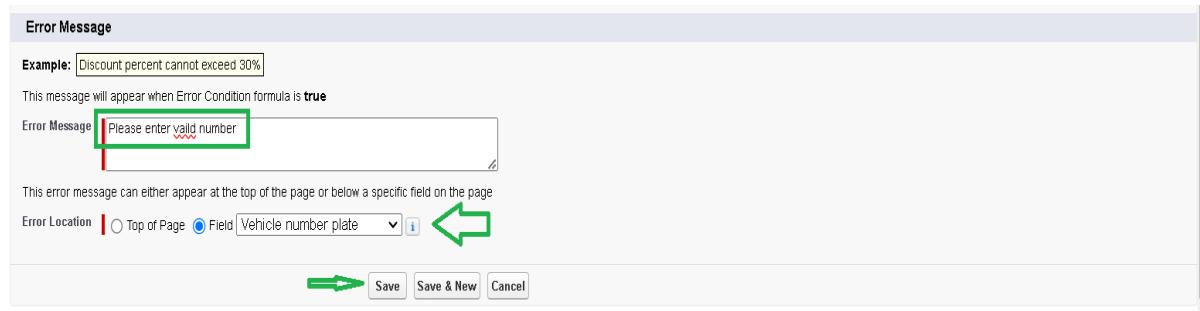
NOT (REGEX (Vehicle\_number\_plate\_\_c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))

**Check Syntax**

ABS(number)  
Returns the absolute value of a number, a number without its sign

Help on this function

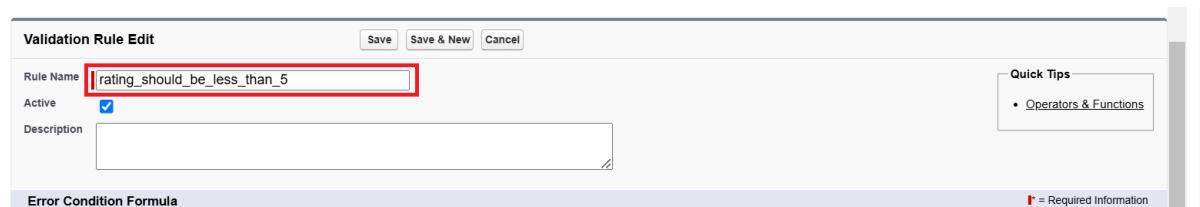
5. Enter the Error Message as “Please enter valid number”, select the Error location as Field and select the field as “Vehicle number plate”, and click Save.



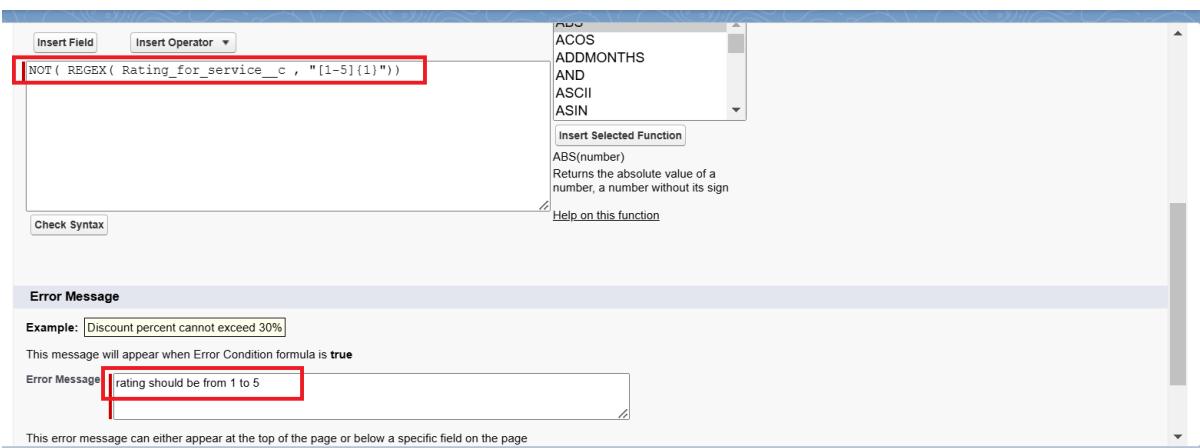
## ACTIVITY 2: To create a validation rule to an Billing details and feedback Object

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}"))



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.



# MILESTONE 6:DUPLICATE RULE

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

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

The screenshot shows the Salesforce Setup interface. In the top navigation bar, 'Setup' is selected. Below it, the 'Object Manager' section is open, with 'Matching Rules' highlighted. A green arrow points to the 'Matching Rules' link. The main content area is titled 'Matching Rules' and displays a table of 'All Matching Rules'. The table has columns for Action, Rule Name, Object, Status, Description, Last Modified Date, and Last Modified By. A green arrow points to the 'New Rule' button at the top right of the table header. The URL in the browser address bar is /setup/ObjectManager/MatchingRules

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

The screenshot shows the 'New Matching Rule' wizard. The title is 'Matching Rule' and the sub-section is 'New Matching Rule'. It is 'Step 1 of 2'. The form has a field 'Object' containing 'Customer Details', which is circled in red. A green arrow points to this field. At the bottom right are 'Next' and 'Cancel' buttons. The URL in the browser address bar is /setup/ObjectManager/MatchingRules/new

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.

**Rule Details**

Object: Customer Details  
 Rule Name: matching Customer data   
 Unique Name: matching\_Customer\_det   
 Description:

**Matching Criteria**

Tell the rule which fields to compare and how.

Field	Matching Method	Match Blank Fields
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"/> AND

Add Filter Logic...

**Buttons:** Save Cancel

**Matching Rule**  
**matching Customer details**

**Matching Rule Detail**

Object: Customer Details  
 Rule Name: matching Customer details  
 Unique Name: matching\_Customer\_details  
 Description:  
 Matching Criteria: (Customer\_Details: Gmail EXACT MatchBlank = FALSE) AND (Customer\_Details: Phone\_Number EXACT MatchBlank = FALSE)  
 Status: Inactive  
 Created By: project\_2, 25/09/2023, 10:15 am  
 Modified By: project\_2, 10/10/2023, 3:32 pm

**Buttons:** Edit Delete Clone Activate

## 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.

**DUP** **Duplicate Rules**

All Duplicate Rules

**What Are Duplicate Rules?**

View: All Duplicate Rules

Rule Name	Description	Matching Rule	Active	Last Modified By	Last Modified Date
Customer Detail duplicate		matching Customer details	<input type="checkbox"/>	n2	10/10/2023
Standard Account Duplicate Rule	Identify accounts that duplicate other accounts.	standard Account Matching Rule	<input checked="" type="checkbox"/>	n2	24/09/2023
Standard Contact Duplicate Rule	Identify contacts that duplicate other contacts and leads.	standard Contact Matching Rule	<input checked="" type="checkbox"/>	n2	24/09/2023
Standard Lead Duplicate Rule	Identify leads that duplicate other leads and contacts.	standard Lead Matching Rule	<input checked="" type="checkbox"/>	n2	24/09/2023

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.

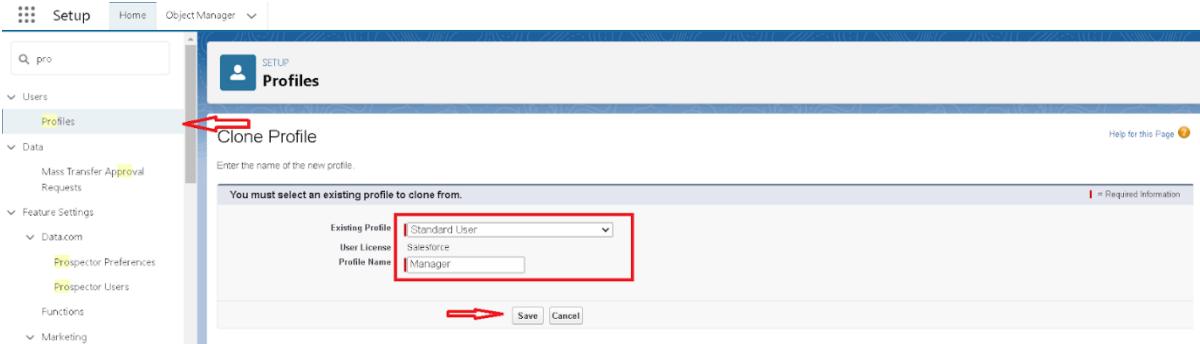
The screenshot shows the 'Duplicate Rule Edit' page for a 'Customer Detail duplicate' rule. The 'Rule Details' section includes a 'Rule Name' field set to 'Customer Detail duplicate' (with a green arrow pointing to it), a 'Description' field, an 'Object' field set to 'Customer Details', and a 'Record-Level Security' section with a radio button selected for 'Enforce sharing rules'. The 'Actions' section defines actions for 'Action On Create' (Allow, Alert checked, Report unchecked) and 'Action On Edit' (Allow, Alert unchecked, Report unchecked). An 'Alert Text' field contains the message 'Use one of these records?'. The 'Matching Rules' section shows a 'Matching Rule' dropdown set to 'Matching Customer details' (with a green arrow pointing to it), a 'Matching Criteria' field containing '(Customer Details: Email EXACT MatchBlank = FALSE) AND (Customer Details: Phone\_Number EXACT MatchBlank = FALSE)', and a 'Field Mapping' section with a 'Mapping Selected' checkbox checked. The 'Conditions' section is empty. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons, with a green arrow pointing to the 'Save' button.

## MILESTONE 8:PROFILE

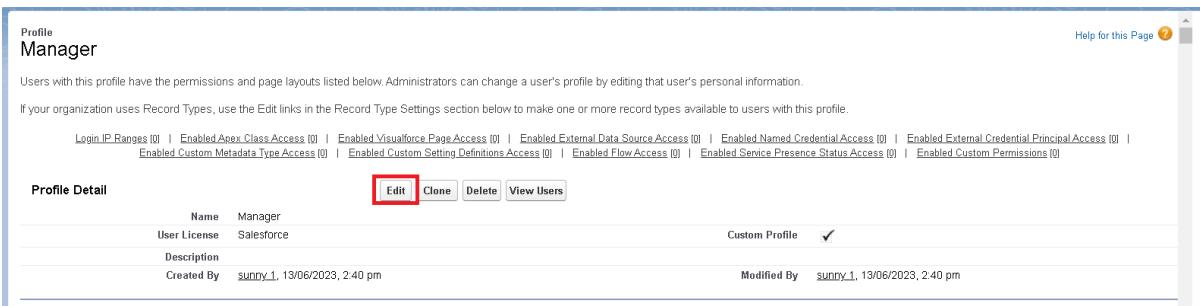
### ACTIVITY 1:MANAGER PROFILE

To create a new profile:

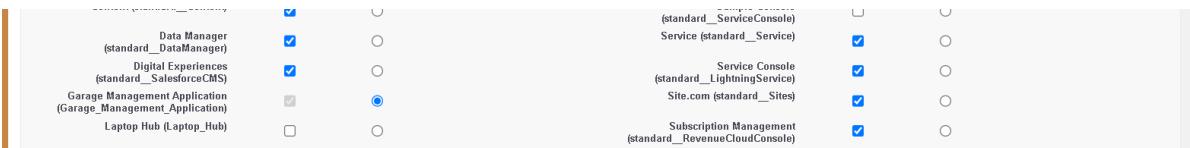
1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (Manager) >> Save.



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.

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

5. Changing the session times out after should be “8 hours of inactivity”.
6. Change the password policies as mentioned:
7. User passwords expire in should be “never expires ”.
8. Minimum password length should be “8 ”, and click save.

## ACTIVITY 2:SALES PERSON PROFILE

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.

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

5. And click save.

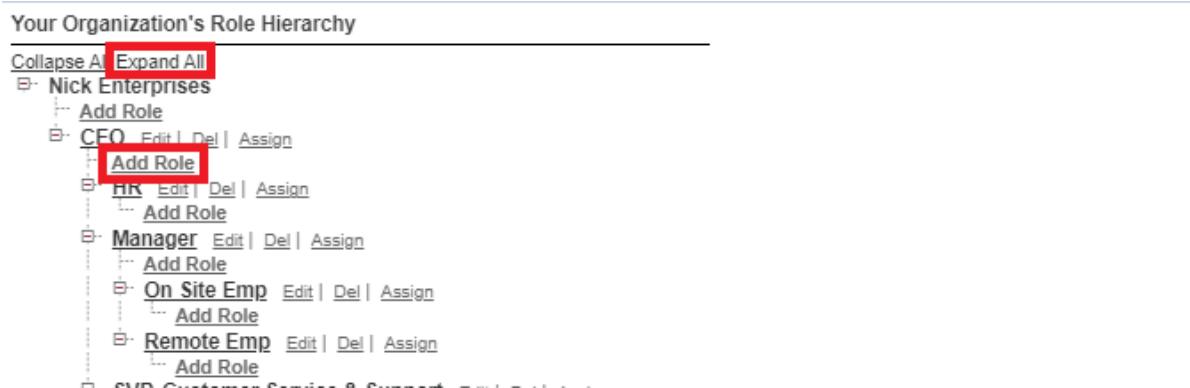
## MILESTONE 9: Role & Role Hierarchy

### ACTIVITY 1:CREATING MANAGER ROLES

Creating Manager Role:

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

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



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

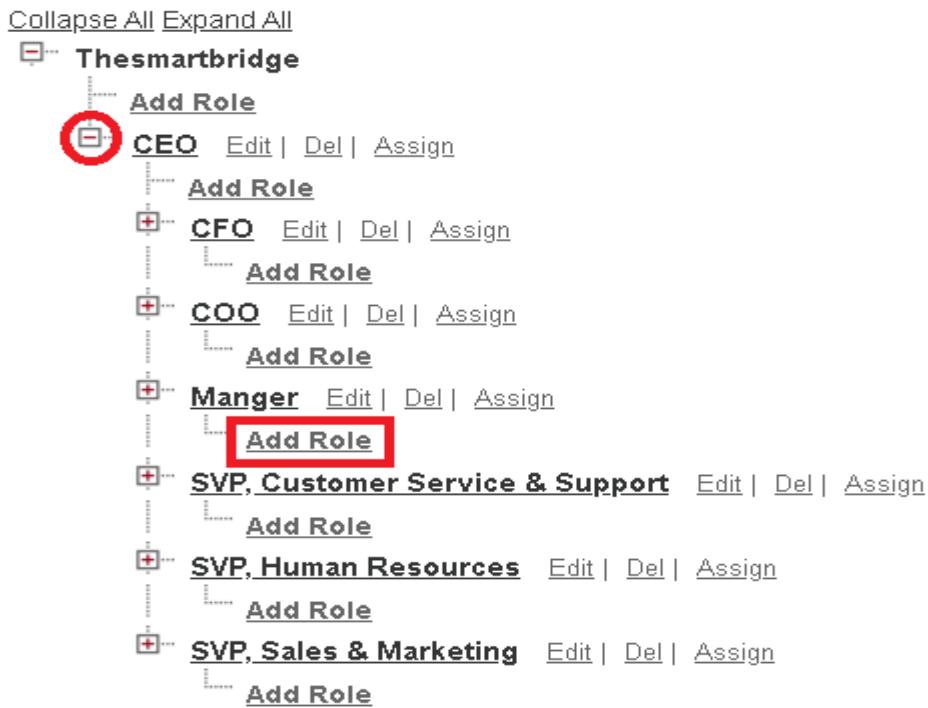
Role Edit

Label	Manger	
Role Name	Manger	
This role reports to	CEO	
Role Name as displayed on reports		
<input type="button" value="Save"/> <input type="button" value="Save &amp; New"/> <input type="button" value="Cancel"/>		

## 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.



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

## MILESTONE 10:USERS

### ACTIVITY 1: CREATE USER

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

## 9. Profiles: Manager

New User

User Edit

Save Save & New Cancel

General Information

First Name: Niklaus  
Last Name: Mikaelson  
Alias: Mika  
Email:   
Username: Mikaelson@Niklaus  
Nickname: nik

Required Information

Role: Manager  
User License: Salesforce  
Profile: Manager  
Active:

Marketing User   
Offline User   
Knowledge User   
Flow User   
Service Cloud User   
Site.com Contributor User   
Site.com Publisher User   
WDC User   
Data.com User Type: --None--

3. Save.

## ACTIVITY 2: CREATING ANOTHER USERS

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

**Note:** create atleast 3 users with these permissions.

## MILESTONE 11: PUBLIC USERS

### ACTIVITY: CREATING NEW PUBLIC GROUP

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

**Note:** create atleast 3 users with these permissions.

## MILESTONE 12: SHARING SETTING

### ACTIVITY: CREATING SHARING SETTING

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 a CRM application. The 'Service records' row is highlighted with a red box around its dropdown menu. The dropdown menu shows 'Private' selected. Other objects listed include Work Plan Template, Work Step Template, Work Type, Work Type Group, Appointment, Billing details and feedback, Customer Details, Environment, Laptop, and SessionData. The 'Private' setting is also applied to these objects. Below the list are sections for 'User Visibility Settings' and 'Other Settings'. At the bottom are 'Save' and 'Cancel' buttons, with 'Save' also highlighted by a red box.

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

The screenshot shows the 'Service records Sharing Rules' page. At the top, there is a header with the title 'Service records Sharing Rules' and a red arrow pointing to the 'New' button. Below the header, it says 'No sharing rules specified.' On the right side, there is a link 'Service records Sharing Rules Help'.

6. Give the Label name as “Sharing setting”
7. Rule name is auto populated.
8. In step 3: Select which records to be shared, members of “Roles ” >> “Sales person”
9. In step 4: share with, select “Roles ” >> “Manager ”
10. In step 5: Change the access level to “Read / write ”.
11. Click on save.

**Sharing Settings**

Step 1: Rule Name

Label: sharing settings  
Rule Name: sharing\_settings (highlighted by a red arrow)

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 (highlighted by a red arrow)

Step 4: Select the users to share with

Share with: Roles: Manager (highlighted by a red arrow)

Step 5: Select the level of access for the users

Access Level: Read/Write (highlighted by a red arrow)

(highlighted by a red arrow) Save Cancel

## MILESTONE 13: FLOWS

### ACTIVITY 1: CREATE A FLOW

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

Setup

Q flows (highlighted by a red box) 1

Process Automation (highlighted by a red box)

Flows (highlighted by a red box) 2

Identity

Login Flows

Search Setup

Flow Trigger Explorer (highlighted by a red box) 3

New Flow

Flow Label	Process Type	Ac...	Te...	Package State	Pa...	Last Modified By	Last Modified ...
Ac Amount update	Autolaunched Flow	<input type="checkbox"/>	<input type="checkbox"/>	Unmanaged	Veera Venkata Varaprasad Androthu	07/06/2023, 11:35 am	
Book Appointment from Invitation	Salesforce Scheduler Flow	<input checked="" 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			
Close Change Request & Related Issues	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			

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

New Flow

Core All + Templates

Screen Flow Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and more.	Record-Triggered Flow Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.
Schedule-Triggered Flow Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.	Platform Event—Triggered Flow Launches when a platform event message is received. This autolaunched flow runs in the background.
Autolaunched Flow (No Trigger) Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.	Record-Triggered Orchestration Launches when a record is created or updated. An orchestration lets you create a multi-step, multi-user process.

2 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.

Configure Start

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

\*Object  
Billing details and feedback

Configure Trigger

\*Trigger the Flow When:  
 A record is created  
 A record is updated  
 A record is created or updated  
 A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements  
None

\*Optimize the Flow for:

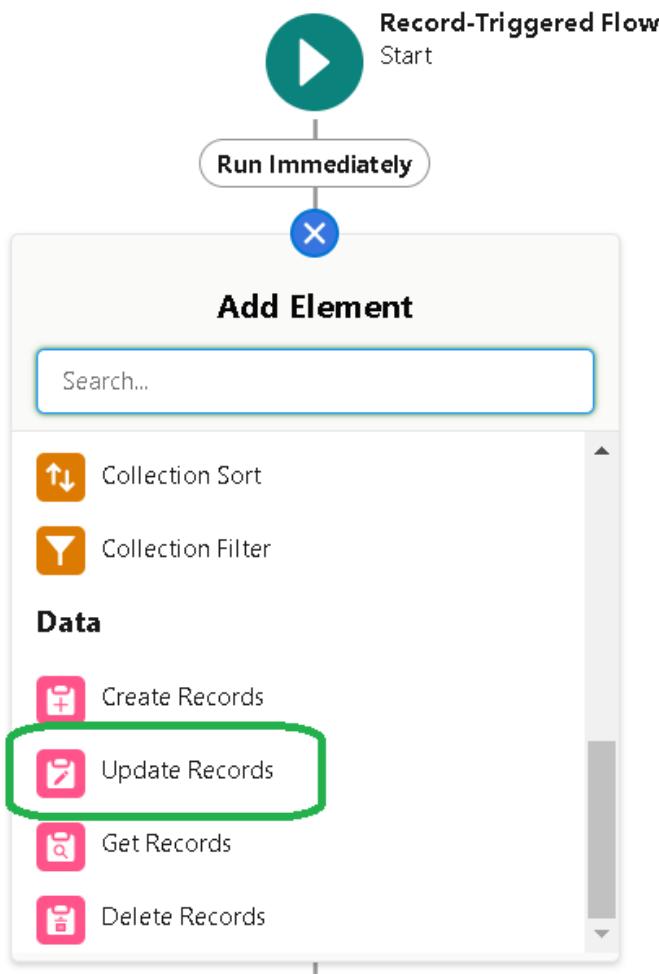
Actions and Related Records

Update any record and perform actions, like send an email. This more flexible flow runs after the record is saved to the database.

Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

3 Done 4

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

## Edit Update Records

Update Salesforce records using values from the flow.

*Label	*API Name
Amount Update	Amount_Update
Description	
<p><b>* How to Find Records to Update and Set Their Values</b></p> <ul style="list-style-type: none"> <li><input checked="" type="radio"/> Use the billing details and feedback record that triggered the flow</li> <li><input type="radio"/> Update records related to the billing details and feedback record that triggered the flow</li> <li><input type="radio"/> Use the IDs and all field values from a record or record collection</li> <li><input type="radio"/> Specify conditions to identify records, and set fields individually</li> </ul>	

**Set Filter Conditions**

Condition Requirements to Update Record

All Conditions Are Met (AND) ▾

Cancel Done

## Set Filter Conditions

Condition Requirements to Update Record

All Conditions Are Met (AND) ▾

Field	Operator	Value
Payment_Status__c	Equals	Completed

+ Add Condition

**Set Field Values for the Billing details and feedback Record**

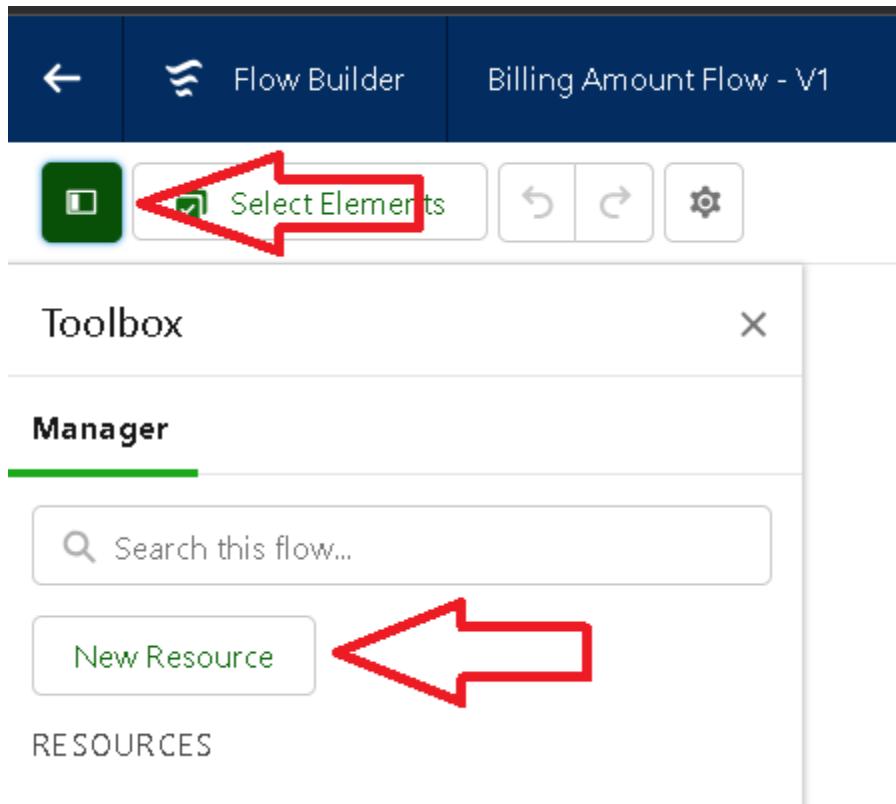
Field	Value
Payment_Paid__c	\$Record > Service records > Appointment > Service A... X

+ Add Field

Cancel Done

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.

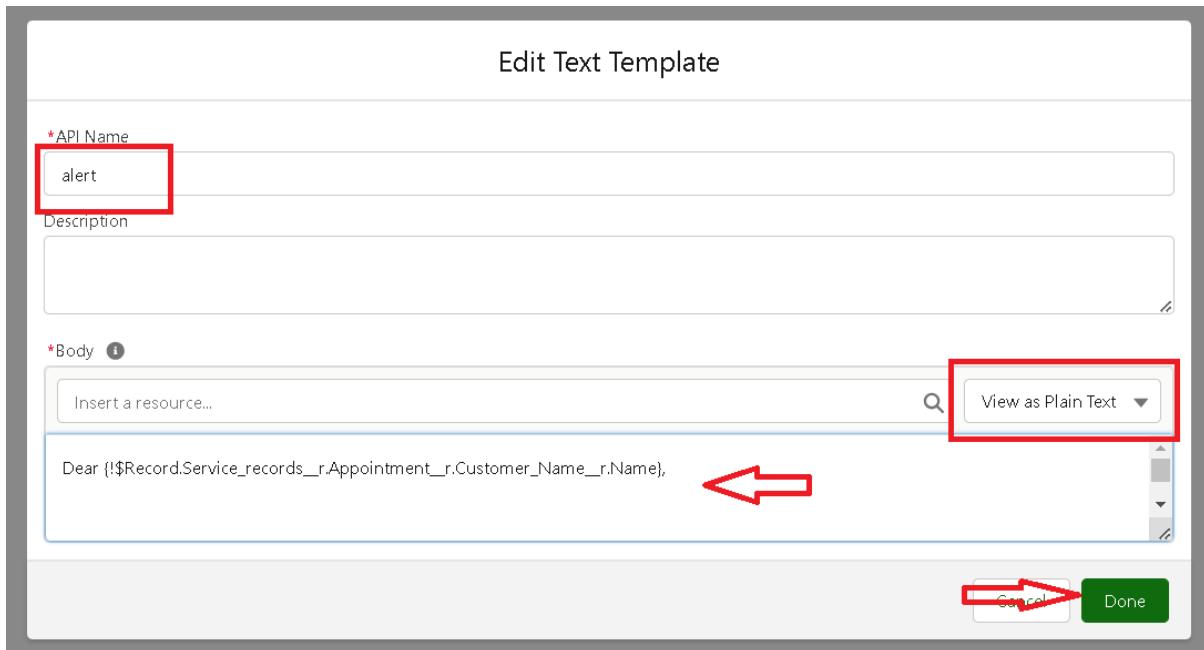
Dear {!\$Record.Service\_records\_\_r.Appointment\_\_r.Customer\_Name\_\_r.Name},

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.

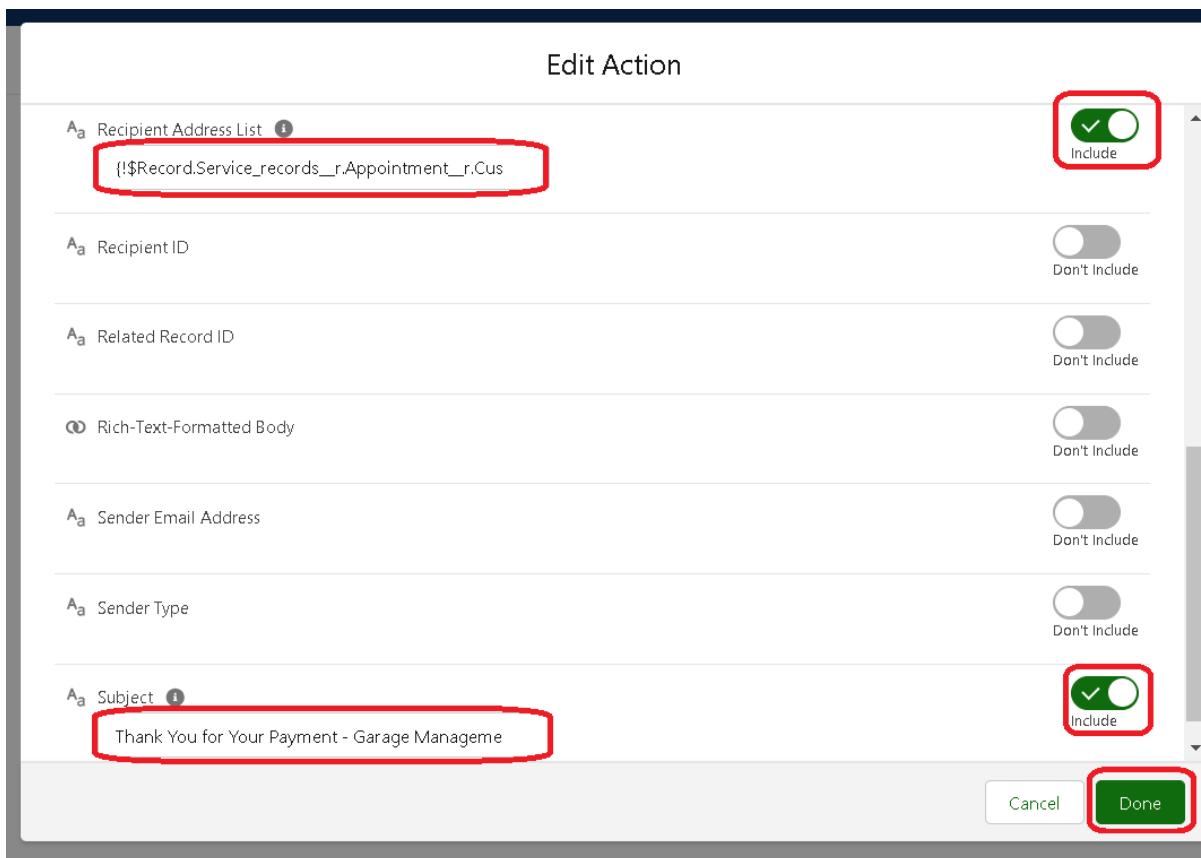
**Edit Action**

Use values from earlier in the flow to set the inputs for the "Send Email" core action. To use its outputs later in the flow, store them in variables.

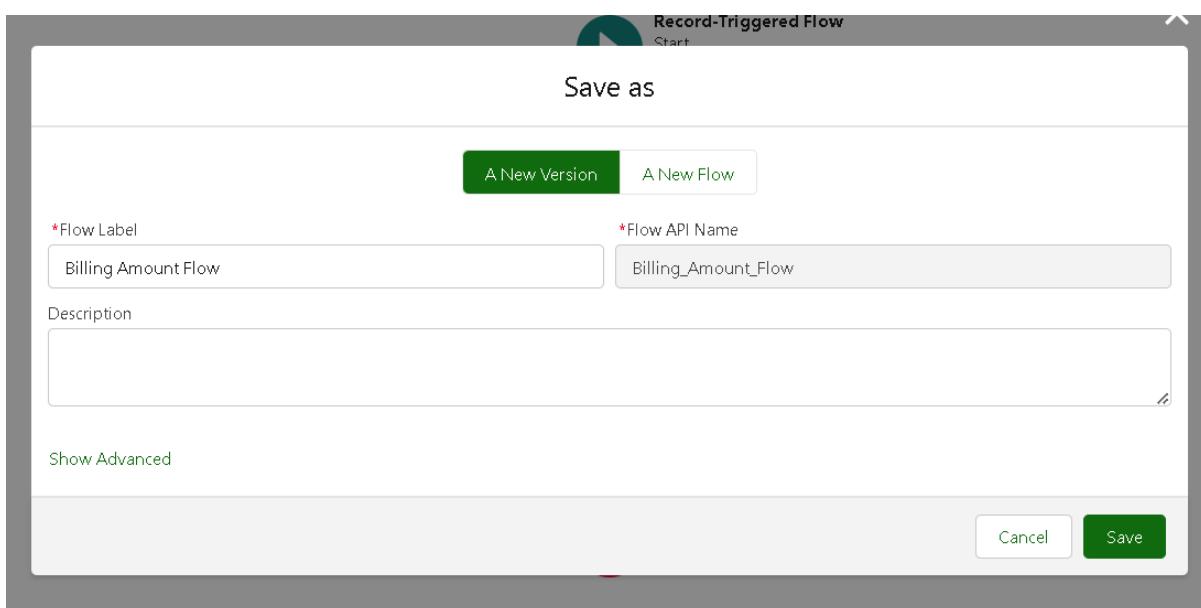
*Label	*API Name
Email Alert	Email_Alert
Description	
<input type="text"/>	

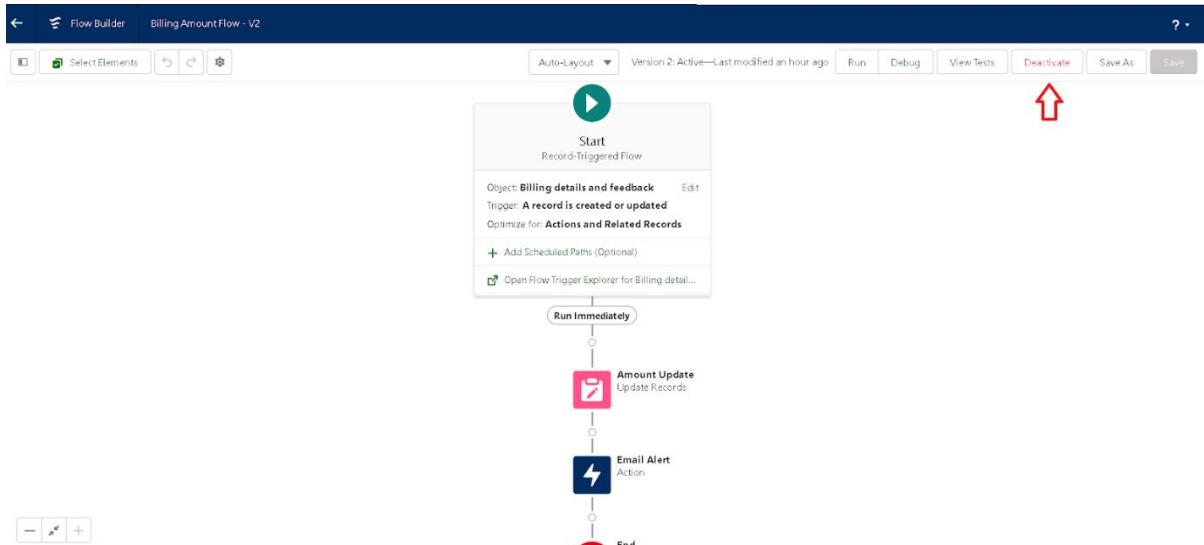
**Set Input Values for the Selected Action**

A_a Body <small>i</small>	<input type="text" value="={!alert}"/>	<input checked="" type="checkbox"/> Include
A_a Email Template ID		<input type="checkbox"/> Don't Include
A_a Log Email on Send		<input type="checkbox"/> Don't Include



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

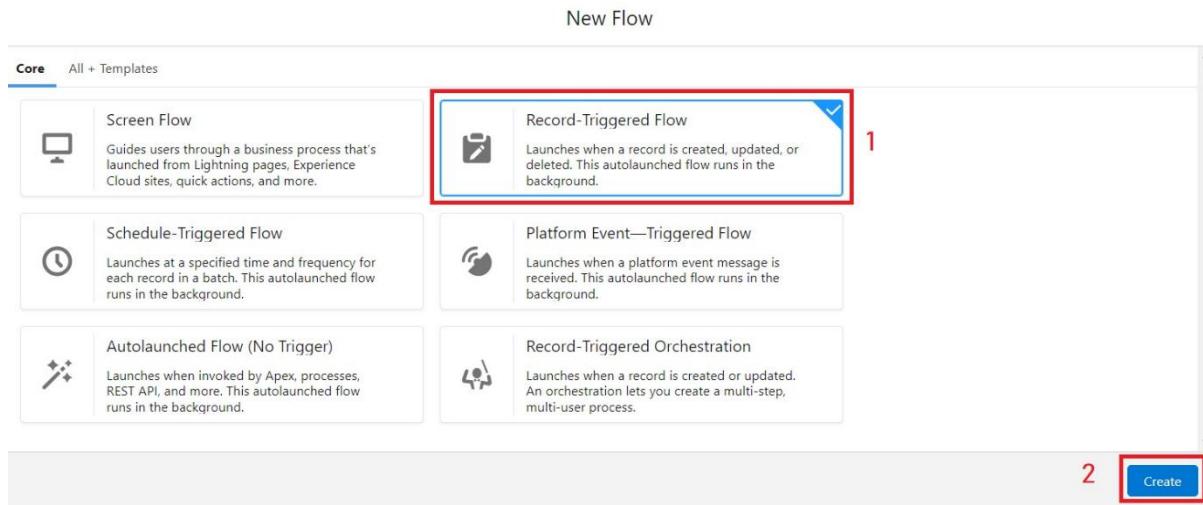
1. Go to setup ? type Flow in quick find box ? Click on the Flow and Select the New Flow.

The screenshot shows the Salesforce Setup page with the following steps highlighted:

1. Search bar with 'flows' entered.
2. 'Flows' link under Process Automation.
3. 'New Flow' button in the Flows list view.

Flow Label	Process Type	Ac...	Te...	Package State	Pa...	Last Modified By	Last Modified ...
Ac Amount update	Autolaunched Flow	<input type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Veera Venkata Varaprasad Androthu	07/06/2023, 11:35 am
Book Appointment from Invitation	Salesforce Scheduler Flow	<input checked="" 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			
Close Change Request & Related Issues	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-installed			

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



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: **Completed**

### Set Filter Conditions

Condition Requirements to Update Record

All Conditions Are Met (AND) ▾

Field

Quality\_Check\_Status\_c

Operator

Equals

Value

True X

+ Add Condition

### Set Field Values for the Service record Record

Field

Service\_Status\_c

Value

Completed

+ Add Field

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 14: APEX TRIGGER

### ACTIVITY: 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 ”.

```

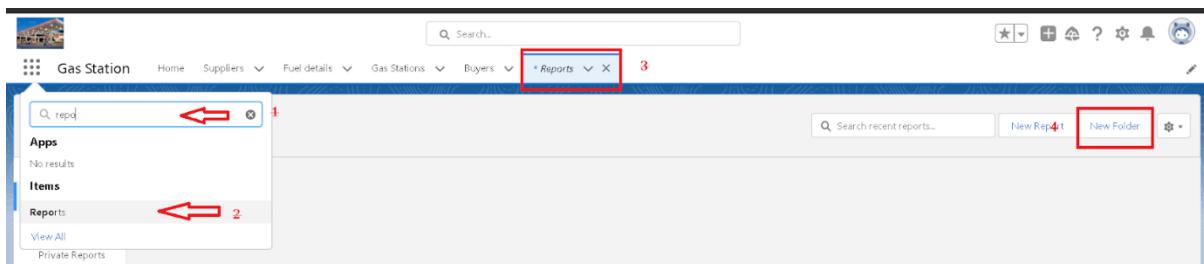
1 public class AmountDistributionHandler {
2
3     public static void amountDist(list<Appointment__c> listApp){
4         list<Service_records__c> serList = new list <Service_records__c>();
5
6         for(Appointment__c app : listApp){
7             if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){
8                 app.Service_Amount__c = 10000;
9             }
10            else if(app.Maintenance_service__c == true && app.Repairs__c == true){
11                app.Service_Amount__c = 5000;
12            }
13            else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
14                app.Service_Amount__c = 8000;
15            }
16            else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
17                app.Service_Amount__c = 7000;
18            }
19            else if(app.Maintenance_service__c == true){
20                app.Service_Amount__c = 2000;
21            }
22            else if(app.Repairs__c == true){
23                app.Service_Amount__c = 3000;
24            }
25            else if(app.Replacement_Parts__c == true){
26                app.Service_Amount__c = 5000;
27            }
28        }
29    }
30 }

```

## MILESTONE 15: REPORTS

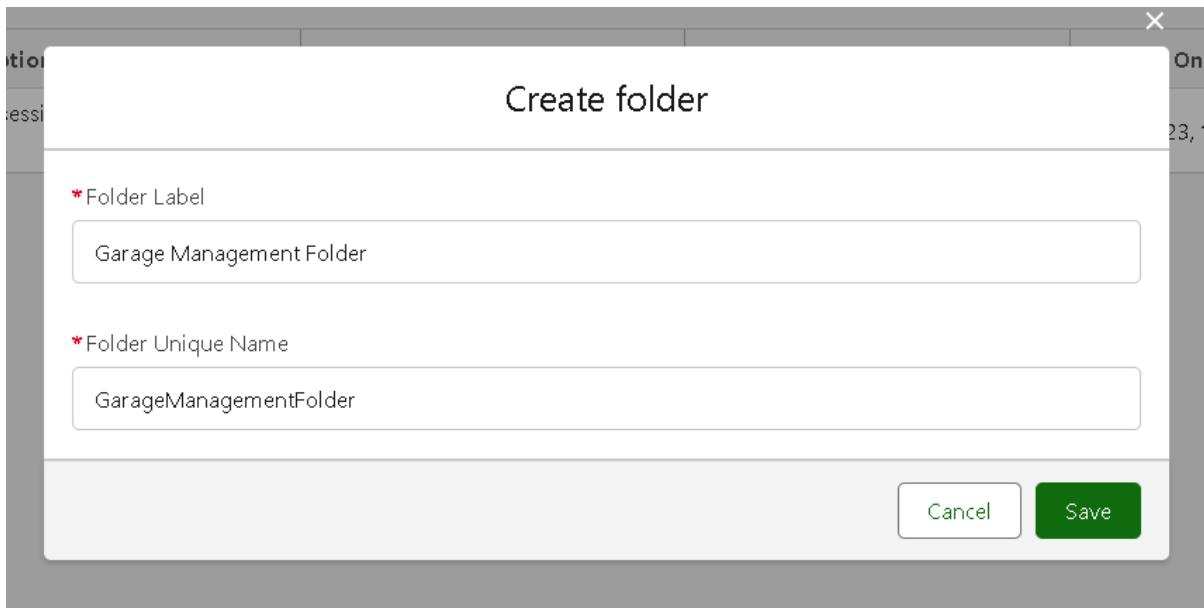
### ACTIVITY 1: CREATE A REPORTS FOLDER

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



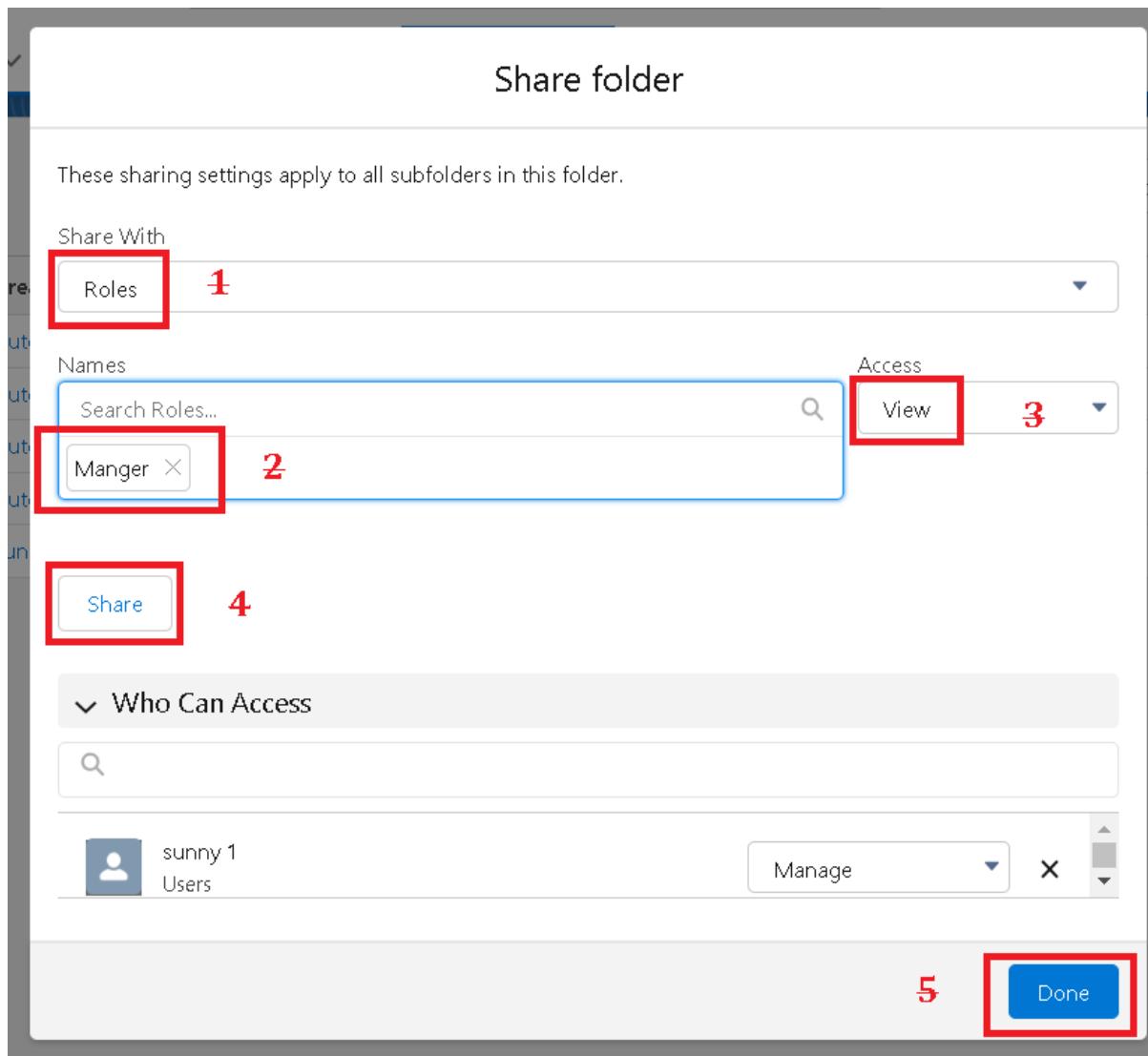
3. Give the Folder label as “Garage Management Folder”, Folder unique name will be auto populated.

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 RECORD TYPE

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

The screenshot shows the Salesforce Setup interface with the 'Report Types' page selected. The sidebar on the left has a 'Reports & Dashboards' section with a 'Report Types' link, which is highlighted with a green arrow. The main content area displays a list of 'All Custom Report Types' with a 'New Custom Report Type' button at the top. Another green arrow points to this button.

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.

The screenshot shows the 'Report Type Focus' configuration screen. It includes sections for 'Report Type Focus', 'Identification' (Primary Object, Report Type Label, Report Type Name, Description, Store in Category), and 'Deployment' (Deployment Status). The 'Report Type Label' and 'Report Type Name' fields are highlighted with green arrows. The 'Store in Category' field is also highlighted with a green arrow. In the 'Deployment' section, the 'Deployed' radio button is selected and highlighted with a green arrow. A green arrow also points to the 'Next' button at the bottom right.

9. now , Click on Related object box.
10. Click on Select Object, choose Appointment Object as shown in fig.

New Custom Report Type  
Service information

Step 2. Define Report Records Set Step 2 of 2

This report type will generate reports about Customer Details. You may define which related records from other objects are returned in report results by choosing a relationship to another object.

**A Customer Details Primary Object**

**B** Select Object...  
--Select Object--  
Activities  
Appointments  
Duplicate Record Items

At least one related "B" record.  
related "B" records.

Previous Save Cancel Previous Save Cancel

### Step 2. Define Report Records Set

This report type will generate reports about Customer Details. You may define which related records from other objects are returned in report results by choosing a relationship to another object.

**A Customer Details Primary Object**

**B** Appointments

**A to B Relationship:**

Each "A" record must have at least one related "B" record.  
 "A" records may or may not have related "B" records.

Click to relate another object

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

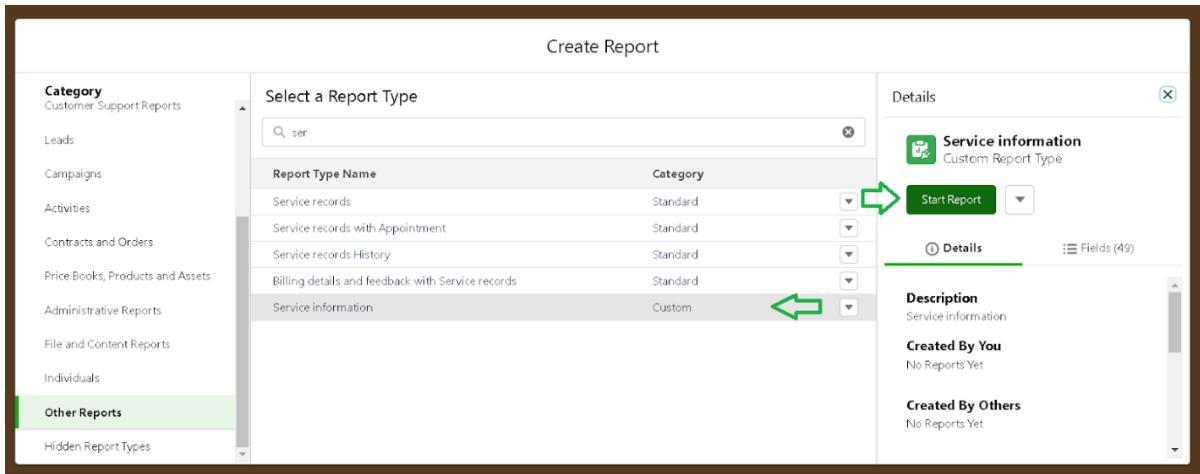
**Note: Before creating report, create latest “10” records in every object.**

**Try to fill every field in each record for better experience.**

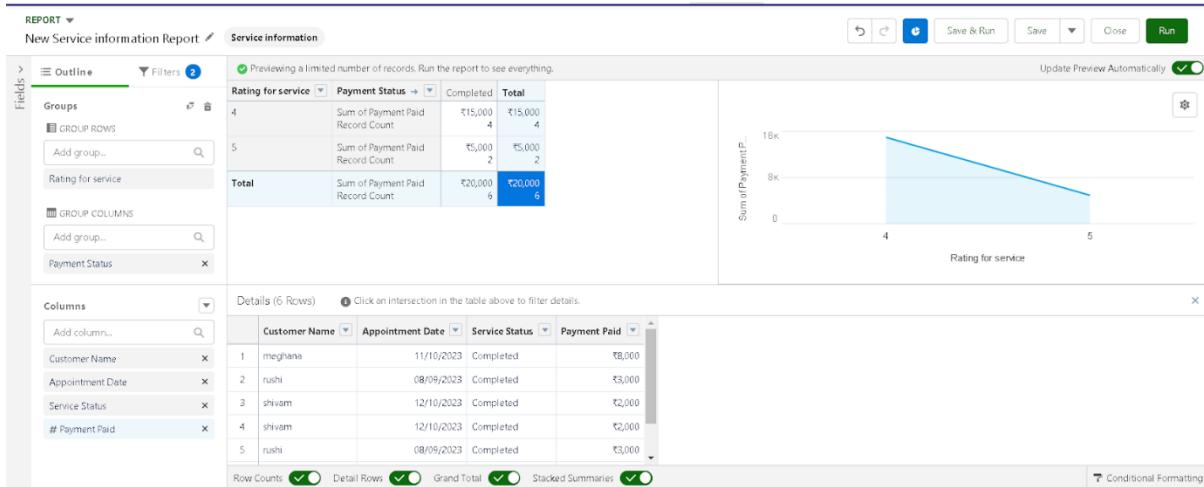
1. Go to the app >> click on the reports tab
2. Click New Report.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Employee's working on projects report		Private Reports	Employee Project	5/6/2023, 9:33 am	
Created by Me	Assets assigned to Employees		Private Reports	Employee Project	5/6/2023, 9:36 am	
Private Reports						
Public Reports						
All Reports						

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.
  1. Customer name
  2. Appointment Date
  3. Service Status
  4. Payment paid
5. Remove the unnecessary 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.
  1. 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.



The screenshot shows a "Save Report" dialog box. It contains fields for "Report Name" (set to "New Service information Report"), "Report Unique Name" (set to "New\_Service\_information\_Report\_oVu"), "Report Description" (empty), and "Folder" (set to "Garage Management Folder"). A green arrow points to the "Report Name" field. Another green arrow points to the "Folder" field. At the bottom right are "Cancel" and "Save" buttons.

## MILESTONE 15: DASHBOARDS

### ACTIVITY 1: CREATING DASHBOARDS FOLDER

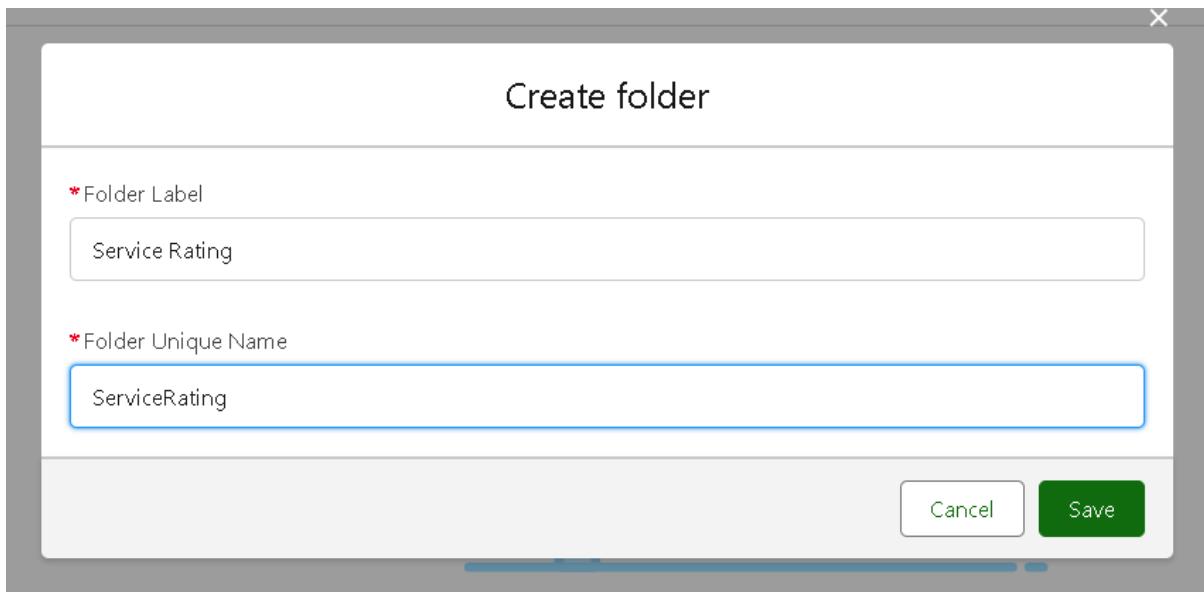
1. Click on the app launcher and search for dashboard.
2. Click on dashboard tab.
3. Click new folder, give the folder label as “Service Rating dashboard”.
4. Folder unique name will be auto populated.
5. Click save.

**Create folder**

\* Folder Label  
Service Rating

\* Folder Unique Name  
ServiceRating

Cancel Save



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

## 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.

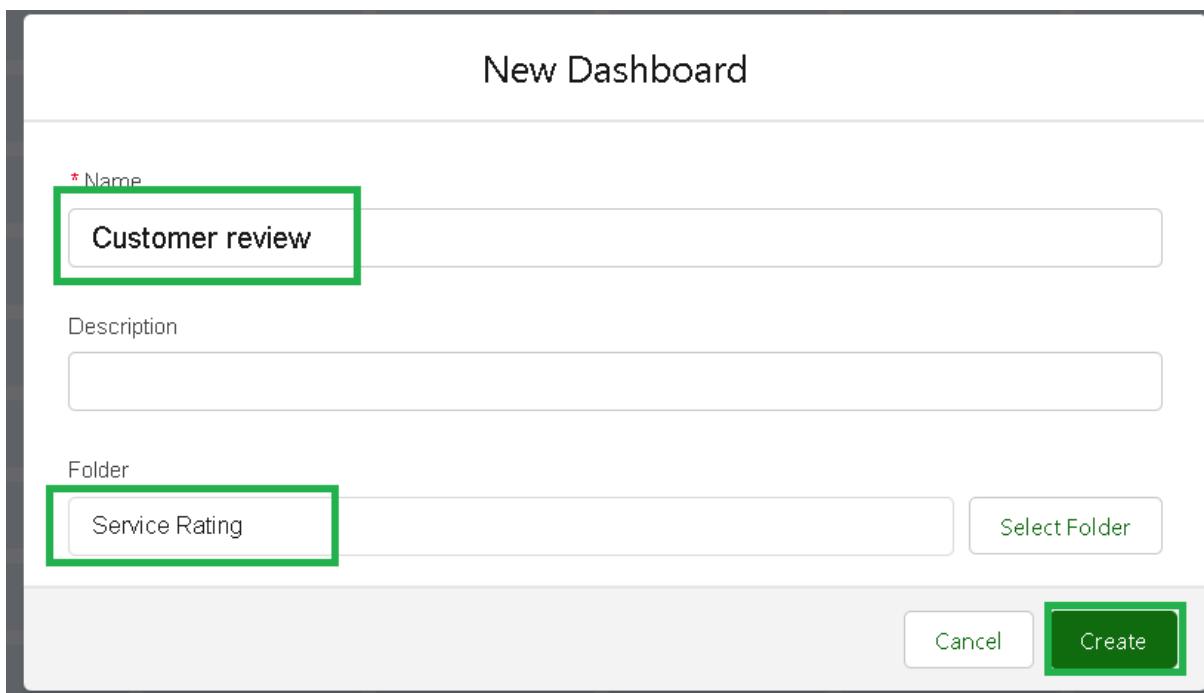
**New Dashboard**

\* Name  
Customer review

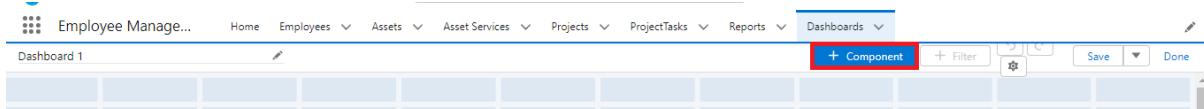
Description

Folder  
Service Rating Select Folder

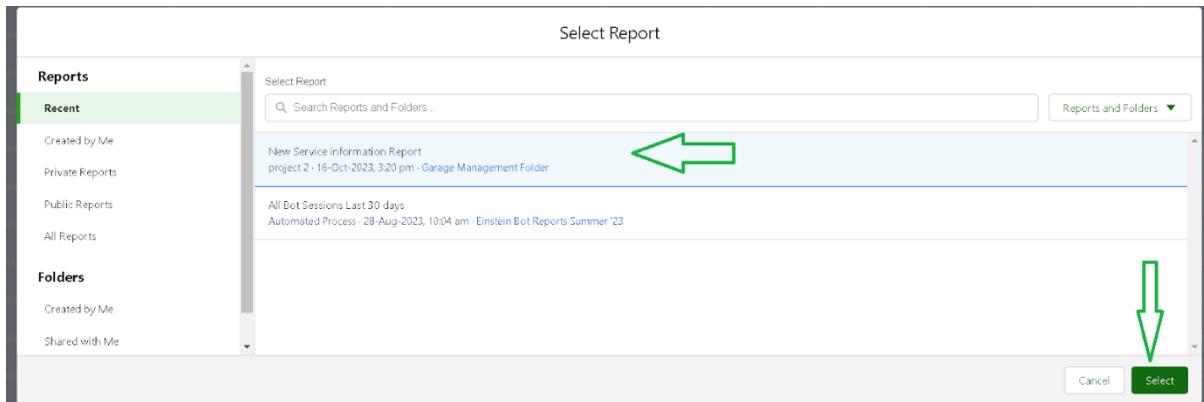
Cancel Create



3. Select add component.



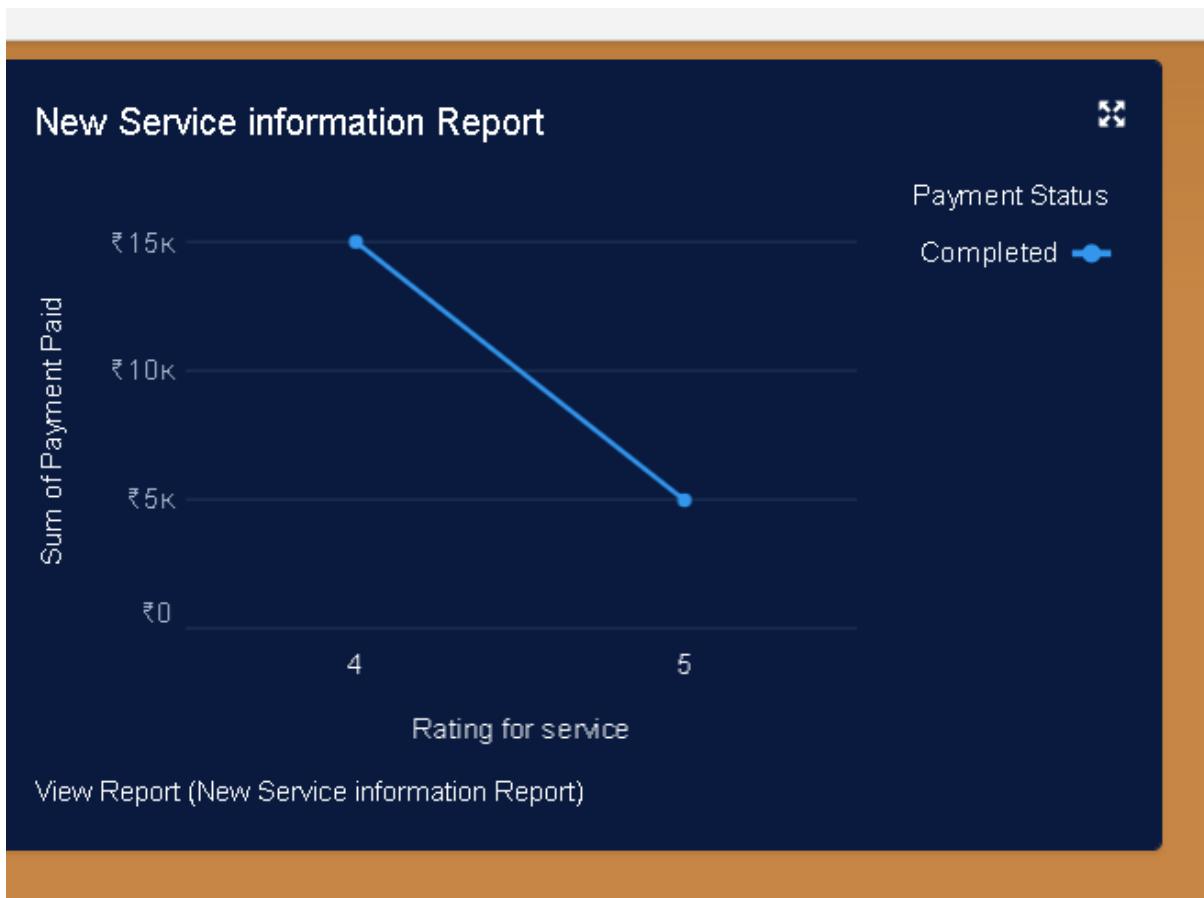
4. Select a Report and click on select.



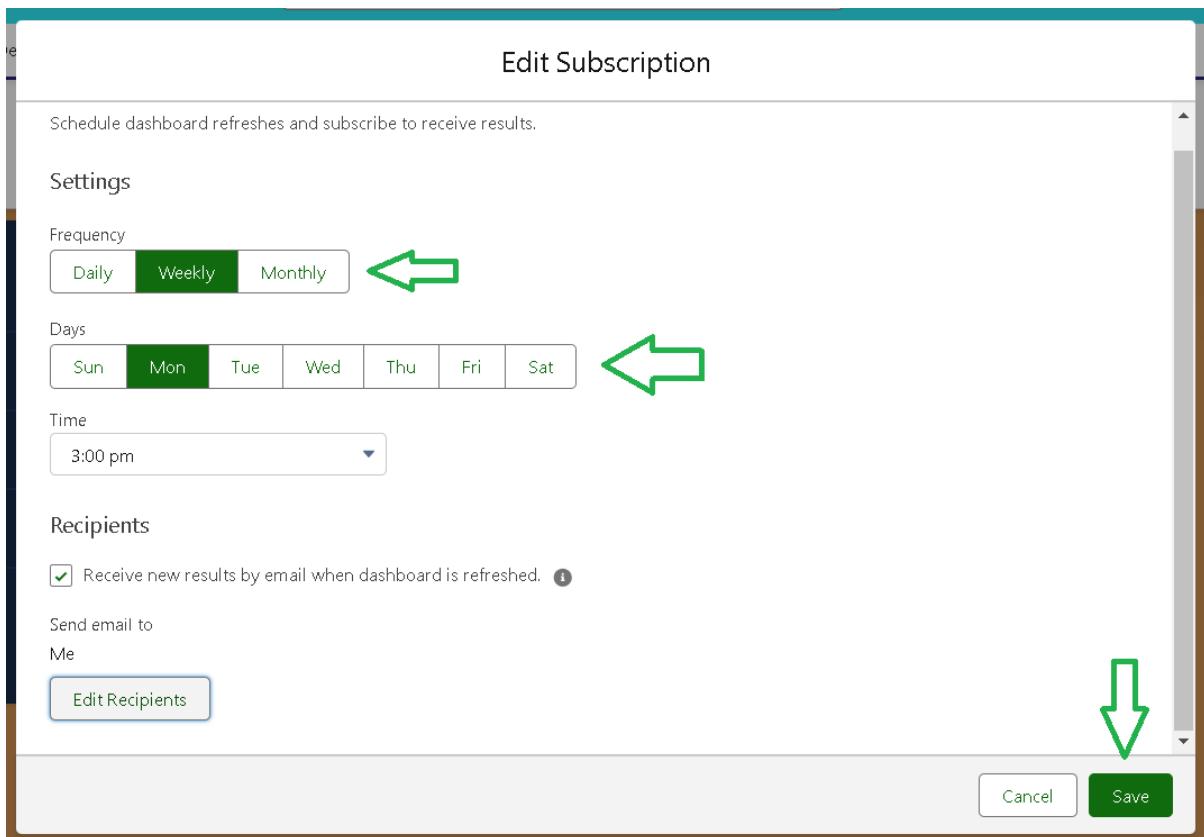
5. Select the Line Chart. Change the theme.

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 16: USER ADOPTION

### ACTIVITY: CREATING RECORDS

To create a record in the follow objects follow these steps

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

## New Customer Details

\* = Required Information

### Information

<b>* Customer Name</b>	Owner
Selva	Raghul K
<b>Phone number</b>	
383822828	
<b>Gmail</b>	
selva@gmail.com	

[Cancel](#) [Save & New](#) [Save](#)

Now, Create the Appointment Record

1. Click on the “**Appointment** tab”.
2. Enter the customer details as created, while entering Appointment Date enter the date less than the created date.
3. Match the validation while entering the vehicle number plate.
4. Select the services you need.
5. Click on save to see the Service Amount.

\* = Required Information

Information

Appointment Name	Owner
Selva	Raghul K
Customer Details	Customer Details
Selva	X
* Appointment Date	Appointment Date
9/5/2025	X
Maintenance service	Maintenance service
<input checked="" type="checkbox"/>	X
Repairs	Repairs
<input checked="" type="checkbox"/>	X
Replacement Parts	Replacement Parts
<input checked="" type="checkbox"/>	X
Service Amount	Service Amount
\$10,000	X
* Vehicle number plate	Vehicle number plate
TN01 TS 28	X

Cancel Save & New Save

## Now, Create a service Record

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

Related **Details**

Service records Name	Owner
ser-002	Raghul K
Appointment	
app-005	X
Service Status	
Started	X
service date	
9/7/2025	X
Quality Check Status	
<input checked="" type="checkbox"/>	X
Created By	Last Modified By
Raghul K, 9/7/2025, 4:39 AM	Raghul K, 9/7/2025, 4:39 AM

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.

## CONCLUSION

The Garage Management System provides an efficient and organized solution for managing day-to-day operations of a garage, including customer records, vehicle details, job assignments, billing, and inventory tracking. By automating manual tasks, the system reduces human errors, saves time, and improves overall productivity. It enhances customer satisfaction through quick service tracking, accurate billing, and transparent communication.

In addition, the system supports better decision-making by generating useful reports and maintaining historical data for future reference. With scalability and adaptability, it can be further enhanced to integrate with online booking, digital payments, and mobile applications.

Overall, the Garage Management System simplifies operations, improves accuracy, and ensures smooth functioning, making it a valuable tool for modern garage businesses.