

GARAGE MANAGEMENT SYSTEM USING SALESFORCE

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TITLE: GARAGE MANAGEMENT SYSTEM USING SALESFORCE

Phase 1: Requirement Analysis & Planning:-

To Garage Management:

"Utilizing Salesforce, our project streamlines garage operations including vehicle service management, customer tracking, and inventory control — ensuring efficiency, accuracy, and transparency."

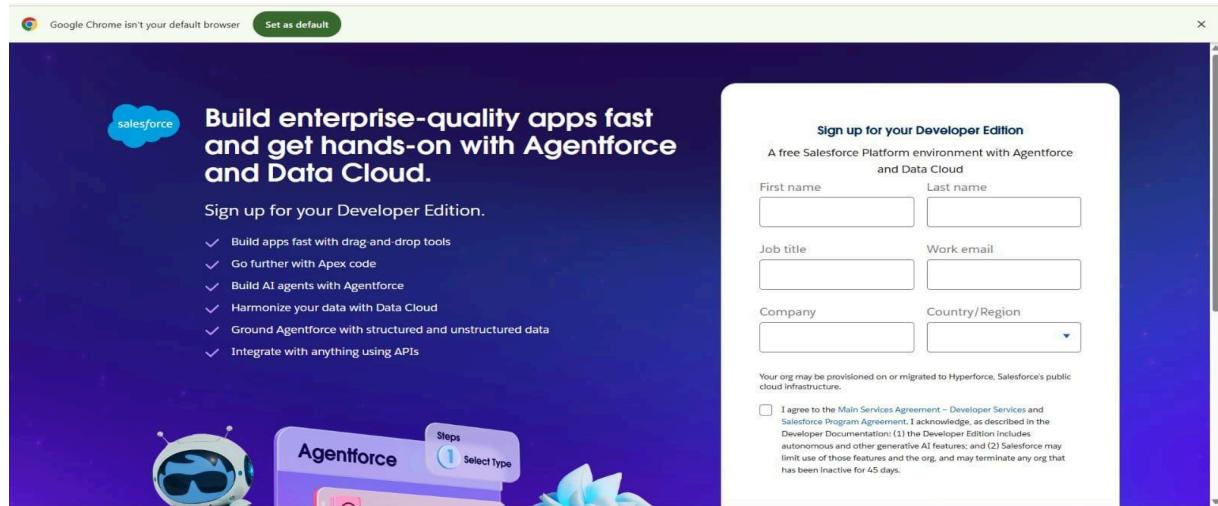
Phase 2: Salesforce Development – Backend &Configurations:-

Milestone 1: Salesforce developer account creation

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 or Company 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.

1. Click on Verify Account

2. Give a password and answer a security question and click on change password.

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

Milestone 2 :OBJECT :-

To Navigate to Setup page:

Click on gear icon ? click setup.

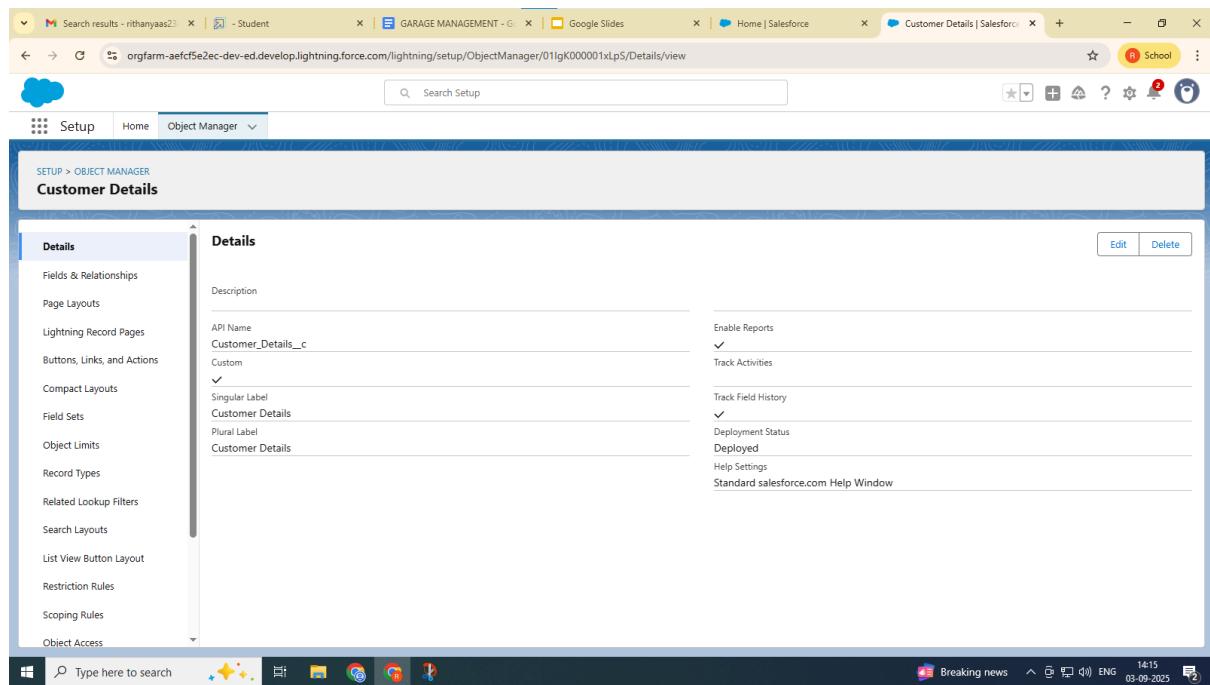
To create an object:

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

2. On Custom object defining page:

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

4. Click on Save.



Create Appointment Object

To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
- Enter the label name >> Appointment
- Plural label name >> Appointments
- Enter Record Name Label and Format
 - Record Name >> Appointment Name
 - Data Type >> Auto Number
 - Display Format >> app-{000}
 - Starting number >> 1

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

The screenshot shows the Salesforce Object Manager interface for the 'Appointment' object. The 'Details' tab is active, showing the following configuration:

- API Name:** Appointment__c
- Singular Label:** Appointment
- Plural Label:** Appointments
- Enable Reports:** ✓
- Track Activities:** ✓
- Track Field History:** ✓
- Deployment Status:** Deployed
- Help Settings:** Standard salesforce.com Help Window

6.Allow search >> Save.

Create Service records Object

To create an object:

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

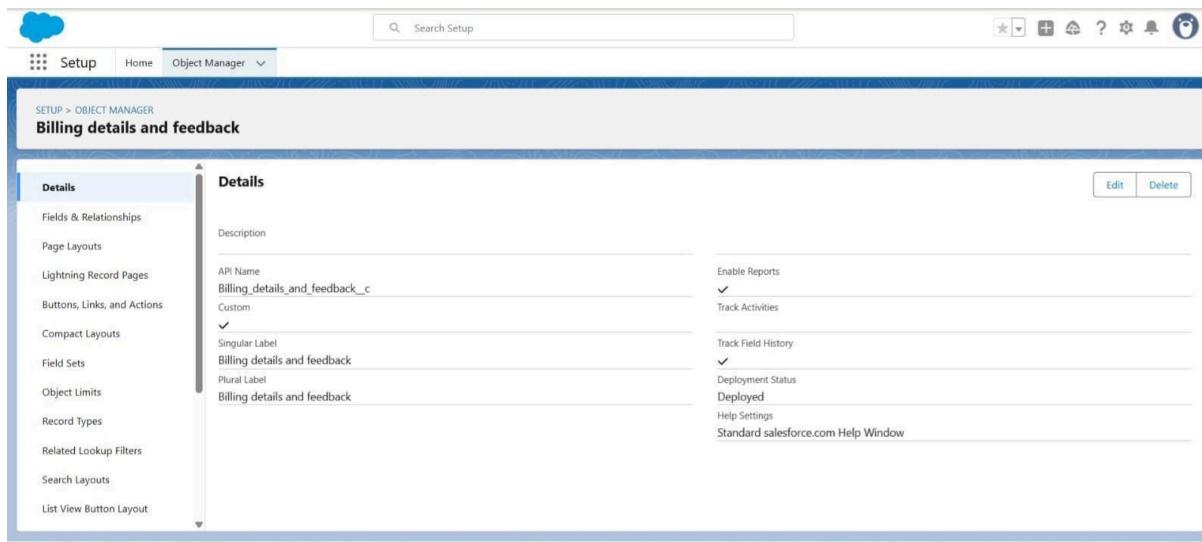
The screenshot shows the 'Edit Custom Object' screen for the 'Service records' object. The 'Custom Object Definition Edit' tab is active, showing the following configuration:

- Custom Object Information:**
 - Label: Service records (Example: Account)
 - Plural Label: Service records (Example: Accounts)
 - Starts with vowel sound:
- Object Name:** Object Name: Service_records (Example: Account)
- Description:** (Empty text area)
- Context-Sensitive Help Setting:**
 - Open the standard Salesforce.com Help & Training window
 - Open a window using a Visualforce page
- Content Name:** (Empty text area)

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



TABS:

A **tab** is a user interface element used to view or create records for objects in Salesforce.

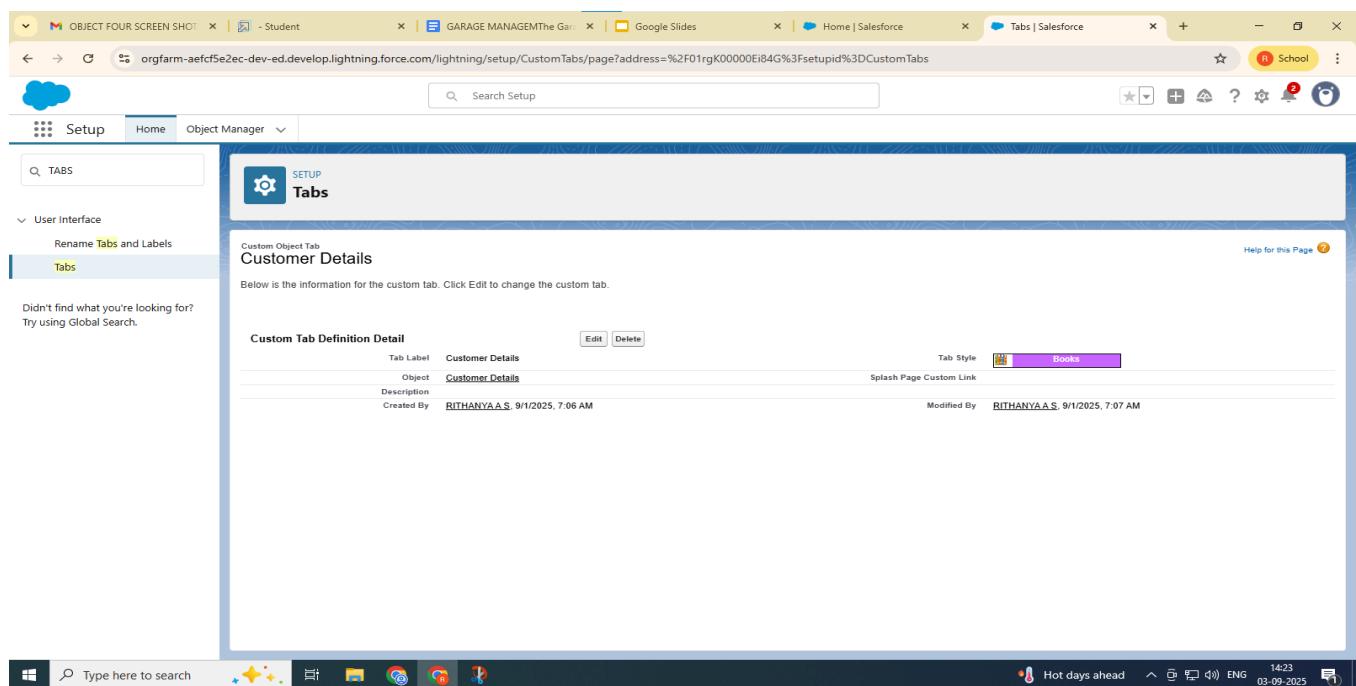
Types of Tabs:

- **Custom Tabs:** Display data from custom objects, similar to standard tabs like Accounts or Contacts.
- **Web Tabs:** Show external web content or apps within Salesforce.
- **Visualforce Tabs:** Display a Visualforce page within a tab.
- **Lightning Component Tabs:** Add Lightning components to the navigation in Lightning Experience or the mobile app.
- **Lightning Page Tabs:** Let you add Lightning Pages to the mobile app menu. These don't appear on the All Tabs page or in tab customization options.

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.

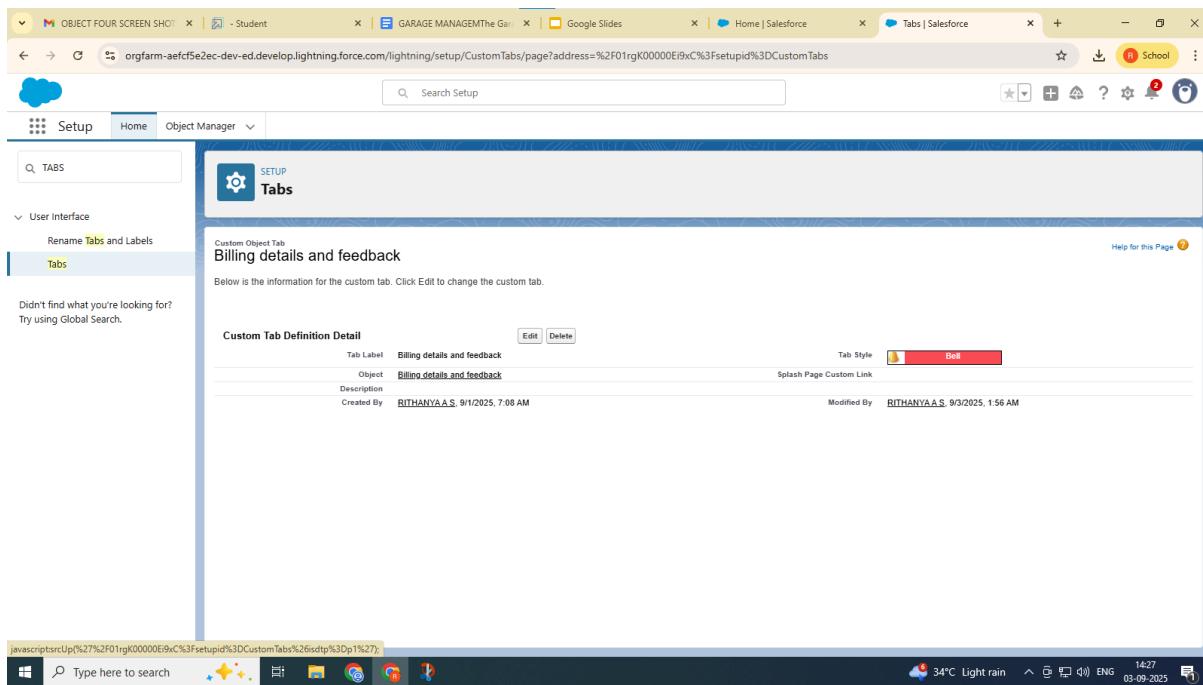


Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

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?".

Creating Remaining Tabs

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



The Lightning App

A **Lightning App** is a collection of objects, tabs, and tools grouped for a specific function. It provides a customized navigation bar in Lightning Experience, allowing users to work efficiently. Apps can be branded with custom colors, logos, utility bars, and Lightning page tabs.

Create a Lightning App

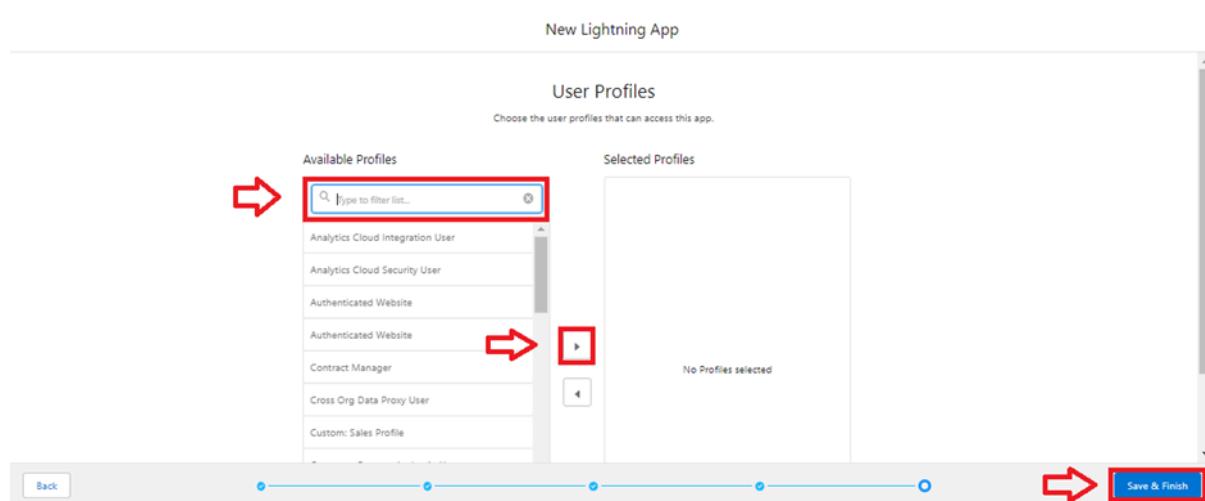
To create a lightning app page:

1. Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App.
 1. **App Details:**
 - Enter app name: **Garage Management Application**
 - Click **Next**
 2. **App Options:**
 - Keep default settings
 - Click **Next**
 3. **Utility Items:**
 - Keep default settings
 - Click **Next**
 4. **Navigation Items:**
 - Search and add:
 - **Customer Details**
 - **Appointments**
 - **Service Record**
 - **Billing Details and Feedback**
 - **Reports and Dashboards**

- Use the arrow button to move them to the selected list
- Click Next

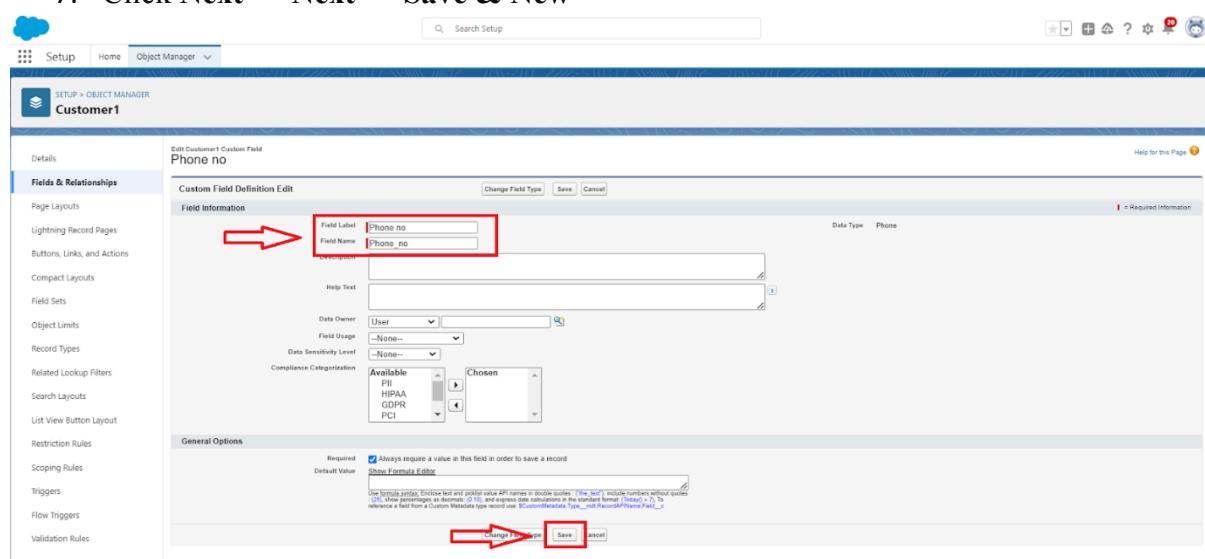
5. User Profiles:

- Search System Administrator
- Click the arrow button to add
- Click Save & Finish



Creation of fields for the Customer Details object

1. Go to Setup
2. Click Object Manager
3. Search for Customer Details and click on it
4. Click Fields & Relationships → New
5. Select Phone as Data Type → Next
6. Fill:
 - Field Label: Phone number
 - Field Name: Auto-generated
7. Click Next → Next → Save & New



Steps to Create Another Field in Customer Details:

1. Go to **Setup**
2. Click **Object Manager**
3. Search **Customer Details** and open it
4. Click **Fields & Relationships** → **New**
5. Select **Email** as Data Type → **Next**
6. Fill:
 - **Field Label:** Gmail
 - **Field Name:** Auto-generated
7. Click **Next** → **Next** → **Save & New**

Creation of Lookup Fields

Creation of Lookup Field on Appointment Object :

1. Go to **Setup**
2. Click **Object Manager**
3. Search **Appointment** and open it
4. Click **Fields & Relationships** → **New**
5. Select **Lookup Relationship** → **Next**
6. Choose **Customer Details** as the related object → **Next**
7. Click **Next** → **Next** → **Save**

Specify the type of information that the custom field will contain.

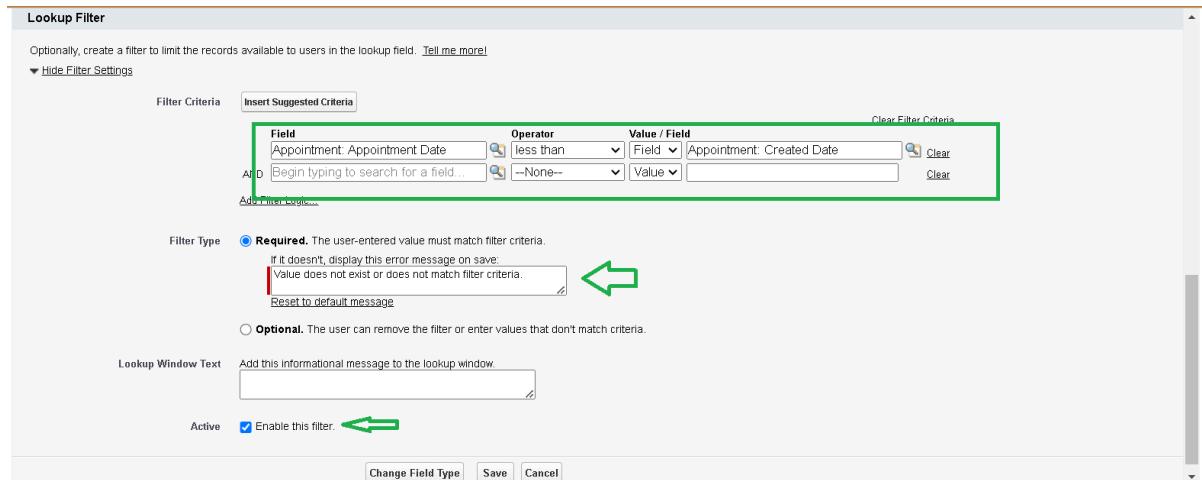
Data Type	
<input type="radio"/> None Selected	Select one of the data types below.
<input type="radio"/> Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
<input type="radio"/> Formula	A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
<input type="radio"/> Roll-Up Summary <small>[i]</small>	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.
<input checked="" type="radio"/> Lookup Relationship <small>[i]</small>	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.
<input type="radio"/> 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: <ul style="list-style-type: none"> • The relationship field is required on all detail records. • The ownership and sharing of a detail record are determined by the master record.

Creation of Lookup Field on Service records Object :

1. Go to **Setup**
2. Click **Object Manager**
3. Search **Service Records** and open it
4. Click **Fields & Relationships** → **New**
5. Select **Lookup Relationship** → **Next**
6. Choose **Appointment** as the related object → **Next**
7. **Make it Required** by checking the **Required** box
8. Scroll to **Lookup Filter** → Click **Show Filter Settings**
 - **Field:** Appointment: Appointment Date
 - **Operator:** Less than
 - **Select Field:** Appointment: Created Date

- **Filter Type:** Required
- **Error Message:** Value does not match the criteria.
- Check Active to enable the filter

9. Click Next → Next → Save



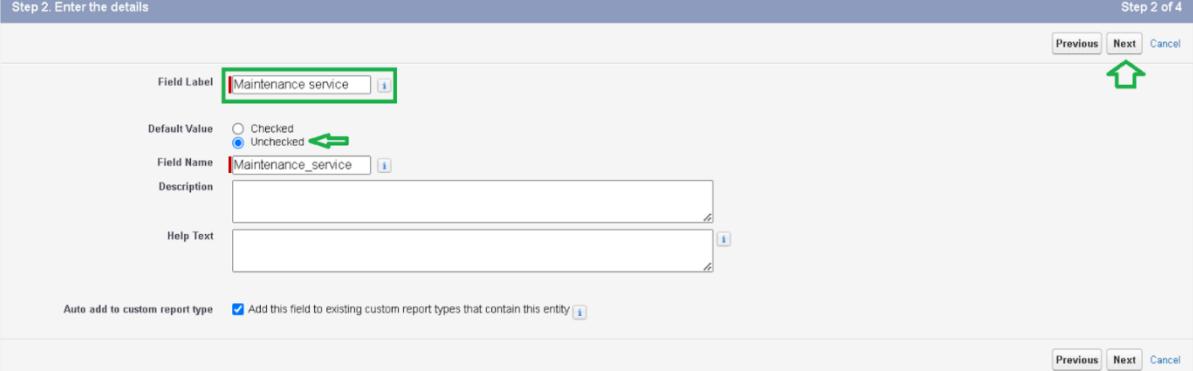
Creation of Lookup Field on Billing details and feedback Object :

1. Go to **Setup**
2. Click **Object Manager**
3. Search **Billing Details and Feedback** and open it
4. Click **Fields & Relationships** → **New**
5. Select **Lookup Relationship** → **Next**
6. Choose **Service Records** as the related object → **Next**
7. Click **Next** → **Next** → **Save & New**

Creation of Checkbox Fields

Creation of Checkbox Field on Appointment Object :

1. Go to **Setup**
2. Click **Object Manager**
3. Search **Appointment** and open it
4. Click **Fields & Relationships** → **New**
5. Select **Checkbox** → **Next**
6. Fill:
 - **Field Label:** Maintenance service
 - **Field Name:** Auto-populated
 - **Default Value:** Unchecked
7. Click **Next** → **Next** → **Save**



Step 2. Enter the details

Step 2 of 4

Field Label: Maintenance service 

Default Value: Checked Unchecked 

Field Name: Maintenance_service 

Description:

Help Text:

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

Previous Next Cancel

Creation of Another Checkbox Field on Appointment Object :

1. Repeat steps 1 to 3 (Go to Setup → Object Manager → Appointment → Fields & Relationships → New)
2. For Repairs:
 - **Field Label:** Repairs
 - **Field Name:** Auto-populated
 - **Default Value:** Unchecked
 - Click Next → Next → Save
3. Repeat steps 1 to 3 again
4. For Replacement Parts:
 - **Field Label:** Replacement Parts
 - **Field Name:** Auto-populated
 - **Default Value:** Unchecked
 - Click Next → Next → Save

Creation of Checkbox Field on Service records Object :

1. Go to **Setup**
2. Click **Object Manager**
3. Search **Service Records** and open it
4. Click **Fields & Relationships** → **New**
5. Select **Checkbox** → **Next**
6. Fill:
 - **Field Label:** Quality Check Status
 - **Field Name:** Auto-populated
 - **Default Value:** Unchecked
7. Click Next → Next → Save

Creation of date Fields

Creation of Date Field on Appointment Object :

1. Go to **Setup**
2. Click **Object Manager**

3. Search **Appointment** and open it
4. Click **Fields & Relationships** → **New**
5. Select **Date** → **Next**
6. Fill:
 - **Field Label:** Appointment Date
 - **Field Name:** Auto-populated
 - Check **Required**
7. Click **Next** → **Next** → **Save**

Appointment
New Custom Field

Help for this Page ?

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label:

Field Name:

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

Default Value: Show Formula Editor

Creation of Currency Fields

Creation of Currency Field on Appointment Object :

1. Go to **Setup**
2. Click **Object Manager**
3. Search **Appointment** and open it
4. Click **Fields & Relationships** → **New**
5. Select **Currency** → **Next**
6. Fill:
 - **Field Label:** Service Amount
 - **Field Name:** Auto-populated
7. Click **Next**
8. Set **Field-Level Security** to **Read-Only** for all profiles

Appointment
New Custom Field

Help for this Page ?

Step 3. Establish field-level security Step 3 of 4

Previous Next Cancel

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"/>



Creation of Currency Field on Billing details and feedback Object :

1. Go to **Setup**
2. Click **Object Manager**
3. Search **Billing Details and Feedback** and open it
4. Click **Fields & Relationships** → **New**
5. Select **Currency** → **Next**
6. Fill:
 - **Field Label:** Payment Paid
 - **Field Name:** Auto-populated
7. Click **Next**
8. Set **Field-Level Security** to **Read-Only** for all profiles
9. Click **Next** → **Save**

Creation of Text Fields

1. Go to **Setup**
2. Click **Object Manager**
3. Search **Appointment** and open it
4. Click **Fields & Relationships** → **New**
5. Select **Text** → **Next**
6. Fill:
 - **Field Label:** Vehicle number plate
 - **Field Name:** Auto-populated
 - **Length:** 10
 - Check **Required** and **Unique**
7. Click **Next** → **Next** → **Save**

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label	<input type="text" value="Vehicle number plate"/> i
Please enter the maximum length for a text field below.	
Length	<input type="text" value="10"/> i
Field Name	<input type="text" value="Vehicle_number_plate"/> i
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
Unique	<input checked="" type="checkbox"/> Do not allow duplicate values <ul style="list-style-type: none"> <input checked="" type="radio"/> Treat "ABC" and "abc" as duplicate values (case insensitive) <input type="radio"/> Treat "ABC" and "abc" as different values (case sensitive)
External ID	<input type="checkbox"/> Set this field as the unique record identifier from an external system
Auto add to custom report type	<input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity i

Creation of Text Fields in Billing details and feedback object :

1. Go to **Setup**
2. Click **Object Manager**
3. Search **Billing Details and Feedback** and open it
4. Click **Fields & Relationships → New**
5. Select **Text → Next**
6. Fill:
 - **Field Label:** Rating for service
 - **Field Name:** Auto-populated
 - **Length:** 1
 - Check **Required**
7. Click **Next → Next → Save**

Creation of Picklist Fields

Creation of Picklist Fields in Service records object :

1. Go to **Setup**
2. Click **Object Manager**
3. Search **Service Records** and open it
4. Click **Fields & Relationships → New**
5. Select **Picklist → Next**
6. Fill:
 - **Field Label:** Service Status
 - Choose **Enter values, with each value separated by a new line**
 - Enter values:
7. Click **Next → Next → Save**

Step 2. Enter the details

Step 2 of 4

Field Label: Service Status

Values:

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

Started
Completed

Field Name: Service_Status

Description:

Creation of Picklist Fields in Billing details and feedback object :

1. Go to Setup
2. Open Object Manager
3. Find and select **Billing Details and Feedback**
4. Click on **Fields & Relationships**, then New
5. Choose **Picklist** and click Next
6. Enter **Payment Status** as the Field Label
7. Choose to enter values manually, and add:
 - Pending
 - Completed
8. Click Next, Next, then Save

Creating Formula Field in Service records Object

1. Go to **Setup**
2. Click **Object Manager**
3. Search and select **Service Records**
4. Go to **Fields & Relationships** → New
5. Select **Formula** → Next
6. Enter **Field Label** and **Field Name** as **service date**
7. Choose **Formula Return Type** as **Date** → Click Next
8. In the formula editor, insert **CreatedDate**
9. Click **Check Syntax**
10. Click Next → Next → Save

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

Validation Rules
1 Items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Vehicle	Vehicle number plate	Please enter valid number	✓	project 2, 25/09/2023, 11:56 am

New

- 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**

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

Validation Rule Edit

Save Save & New Cancel

Rule Name Vehicle

Active

Description vehicle

Error Condition Formula

Example: 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

`NOT (REGEX (Vehicle_number_plate_c , "[A-Z] (2) [0-9] (2) [A-Z] (2) [0-9] (4)))`

Functions -- All Function Categories --

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

ABS(number)
Returns the absolute value of a number, a number without its sign
[Help on this function](#)

Check Syntax

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.

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is true

Error Message Please enter valid number

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

Error Location Top of Page Field Vehicle number plate

Save Save & New Cancel

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

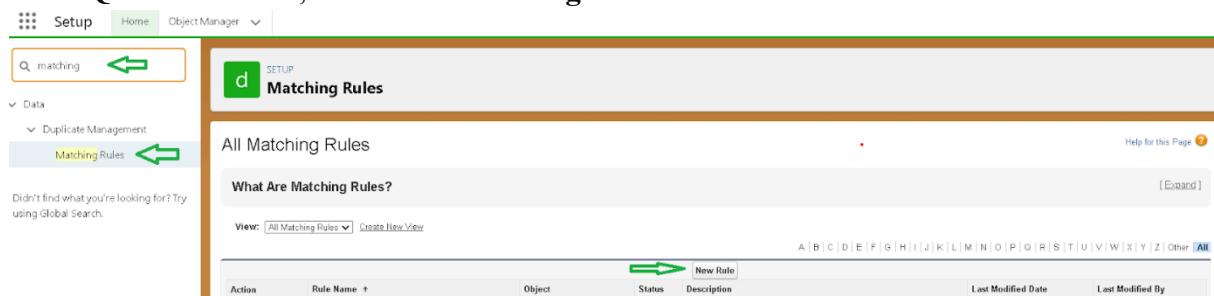
1. Go to **Setup**
2. Click **Object Manager**
3. Find and open **Billing Details and Feedback**
4. Click **Validation Rules → New**

5. **Rule Name:** rating_should_be_less_than_5
6. In the formula area, add the logic to check if rating is between 1 and 5
7. **Error Message:** rating should be from 1 to 5
8. **Error Location:** Choose Field → Select Rating for Service
9. Click Save

The screenshot shows the 'Validation Rule Edit' interface. The 'Rule Name' field contains 'rating_should_be_less_than_5'. The 'Active' checkbox is checked. The 'Error Condition Formula' section contains the formula 'NOT(REGEX(Rating_for_service_c , "[1-5]{1}"))'. A dropdown menu for functions like ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN is visible. The 'Error Message' section contains the message 'rating should be from 1 to 5'. A note at the bottom says 'This error message can either appear at the top of the page or below a specific field on the page'.

To create a matching rule to an Customer details Object

1. Go to Setup
2. In the Quick Find box, search for Matching Rule



3. Click Matching Rules → New Rule

The screenshot shows the 'New Matching Rule' wizard. Step 1: Select object. It asks to select the object to which this matching rule applies. A dropdown menu for 'Object' is open, showing 'Customer Details' which is highlighted with a green box. A green arrow points to this dropdown. The top right corner of the screen has a green arrow pointing up.

4. Select Customer Details as the object → Click Next
5. Enter Rule Name: Matching customer details
 - Unique Name: Auto-filled

6. Define Matching Criteria:
 - **Gmail** → Matching Method: Exact
 - **Phone Number** → Matching Method: Exact
7. Click Save
8. After saving, click 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... ➡ Save Cancel

Matching Rule
matching Customer details Help for this Page ?

Matching Rule Detail

Object	Customer Details
Rule Name	matching Customer details
Unique Name	matching_Customer_details
Description	
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

➡ Edit Delete Clone Activate

To create a Duplicate rule to an Customer details Object

1. Go to Setup
2. In the Quick Find box, search for **Duplicate Rules**

Duplicate Rules

All Duplicate Rules Help for this Page ?

What Are Duplicate Rules? [Expand]

View: All Duplicate Rules A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other All

Rule Name	Description	Matching Rule	Active	Last Modified By	Last Modified Date
Customer Detail duplicate	Identify accounts that duplicate other accounts.	matching Customer details	<input type="checkbox"/>	g2	10/10/2023
Standard Account Duplicate Rule	Identify contacts that duplicate other contacts and leads.	standard Account Matching Rule	<input checked="" type="checkbox"/>	g2	24/09/2023
Standard Contact Duplicate Rule	Identify leads that duplicate other leads and contacts.	standard Lead Matching Rule	<input checked="" type="checkbox"/>	g2	24/09/2023
Standard Lead Duplicate Rule		standard Contact Matching Rule	<input checked="" type="checkbox"/>	g2	24/09/2023
Customer Details					

3. Click **Duplicate Rules** → New Rule
4. Select **Customer Details** as the object
5. Enter **Rule Name: Customer Detail duplicate**
6. Scroll to the **Matching Rule** section
7. Select **Matching customer details**

8. Click Save

9. After saving, click Activate

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.

Profile Manager

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Custom Profile ✓

Name	Manager
User License	Salesforce
Description	
Created By	sunny_1, 13/06/2023, 2:40 pm
Modified By	sunny_1, 13/06/2023, 2:40 pm

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

Data Manager (standard_DataManager)

Digital Experiences (standard_SalesforceCMS)

Garage Management Application (Garage_Management_Application)

Laptop Hub (Laptop_Hub)

(standard_ServiceConsole) Service (standard_Service)

Service Console (standard_LightningService)

Site.com (standard_Sites)

Subscription Management (standard_RevenueCloudConsole)

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.

Object	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 “ neverexpires ”.

8. Minimum password length should be “ 8 ”, and click save.

Sales person Profile

1. Go to Setup
2. In the Quick Find box, type Profiles
3. Click on Profiles
4. Find and clone the profile **Salesforce Platform User**
5. Enter **Profile Name: sales person** → Click Save
6. On the profile page, click Edit
7. Set **Garage Management Application** as the default app
8. Scroll to **Custom Object Permissions**
9. Give required access to:
 - Appointments
 - Billing details and feedback
 - Service records
 - Customer details

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"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input 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"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input 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"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input 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"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<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"/>
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<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"/>
	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input 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"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Creating Manager Role

1. Go to Setup
2. In the Quick Find box, search for Roles

The screenshot shows the 'Roles' page in the Salesforce Setup menu. The search bar at the top has 'roles' typed into it. Below the search bar, there's a sidebar with sections like 'Users' and 'Roles'. The main content area displays a 'Sample Role Hierarchy' diagram. At the top of the hierarchy is 'Executive Staff', which includes 'CEO - President' and 'CFO - VP, Sales'. Below them are 'Western Sales Director', 'Eastern Sales Director', and 'International Sales Director'. Each of these directors oversees multiple sales representatives (e.g., CA Sales Rep, NY Sales Rep, MA Sales Rep). To the right of the diagram, there's a legend explaining the icons: a person icon for View & edit data, a document icon for Roll up summaries, & generate reports, and a gear icon for Can't access data of other objects. A red box highlights the 'Set Up Roles' button at the bottom right of the page.

3. Click on Set Up Roles

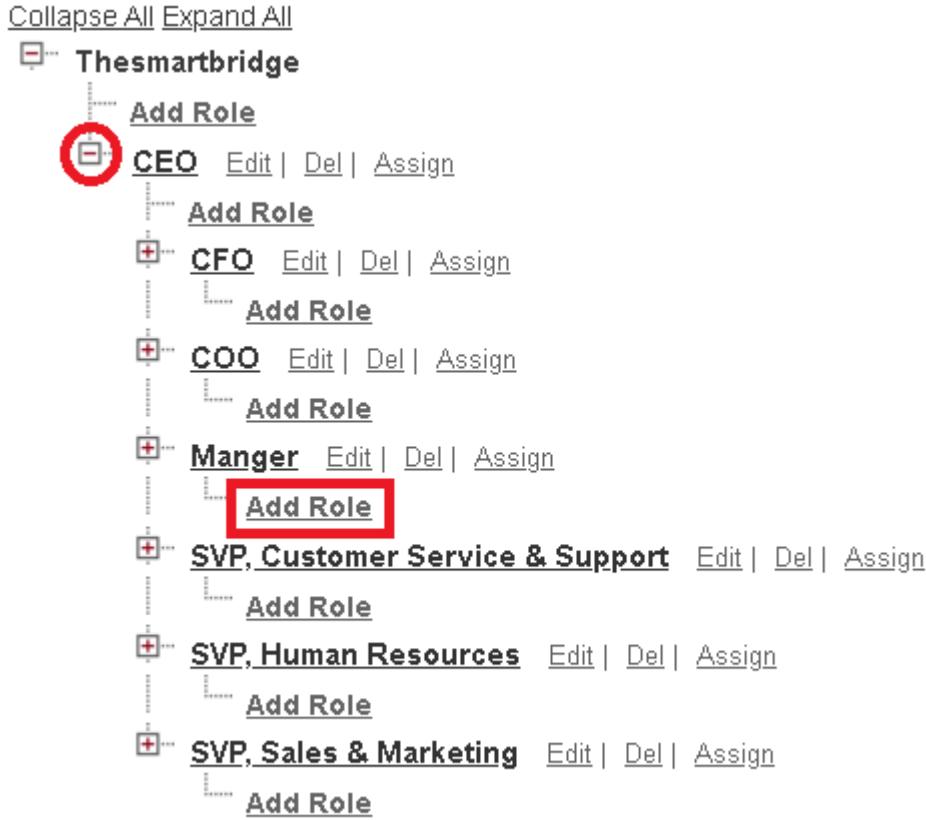
The screenshot shows the 'Your Organization's Role Hierarchy' page. At the top left, there are 'Collapse All' and 'Expand All' buttons, with 'Expand All' highlighted by a red box. The main tree view shows the 'Nick Enterprises' organization structure. Under 'Nick Enterprises', there are several roles listed with their respective edit, delete, and assign buttons. The 'Manager' role is specifically highlighted with a red box around its 'Edit | Del | Assign' buttons. Underneath the 'Manager' role, there are further sub-roles like 'On Site Emp' and 'Remote Emp', each with their own edit, delete, and assign buttons. A red box also highlights the 'Add Role' button under the 'Manager' role.

4. Click Expand All
5. Click Add Role under the role this new role reports to
6. Enter Label: Manager (Role Name auto-fills)
7. Click Save

The screenshot shows the 'Role Edit' form. It has fields for 'Label' (containing 'Manger' with a red arrow pointing to it), 'Role Name' (containing 'Manger'), 'This role reports to' (set to 'CEO'), and 'Role Name as displayed on reports' (empty). At the bottom of the form, there are 'Save', 'Save & New', and 'Cancel' buttons, with a red arrow pointing to the 'Save' button.

Creating another roles

1. Go to **Setup**
 2. In the **Quick Find** box, type **Roles**
 3. Click **Set Up Roles**
 4. Click the **plus (+)** next to **CEO** to expand
 5. Click **Add Role** under **Manager**
-



6. Enter **Label:** *sales person* (Role Name auto-fills)
7. Click **Save**

Create User

1. Go to **Setup**
2. In the **Quick Find** box, type **Users**
3. Click **Users**
4. Click **New User**
5. Fill in the details:
 - **First Name:** Niklaus
 - **Last Name:** Mikaelson
 - **Alias:** (your chosen alias)
 - **Email:** (your personal email)
 - **Username:** (format: text@text.text)
 - **Nickname:** (your chosen nickname)
 - **Role:** Manager
 - **User License:** Salesforce
 - **Profile:** Manager

6. Click Save

New User

User Edit

General Information

First Name	Niklaus
Last Name	Mikaelson
Alias	nmika
Email	
Username	Mikaelson@Niklaus
Nickname	nik
Title	
Company	
Department	
Division	

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--

Customer Review | Salesforce

Users | Salesforce

orgfarm-78403a2162-dev-ed.lightning.force.com/lightning/setup/ManageUsers/home

Setup Home Object Manager

Search Setup

Users

All Users

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users [Edit](#) [Create New View](#)

Action	Full Name	Alias	Username	Role	Active	Profile
Edit	Chatter Expert	Chatter	chatty.00gp000009davyauu.z7073a8zddn@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
Edit	EPIC_OrgFarm	OEPIG	epic.344bc231e35@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
Edit	John Michael	mjohn	abjohn@mrcheat28.com		<input checked="" type="checkbox"/>	sales person
Edit	M_abiasra	abi	abbiasra777@agentforce.com	sales.person	<input checked="" type="checkbox"/>	System Administrator
Edit	Mikaelson_Niklaus	nmika	abmikaelson@niklaus28.com	Manager	<input checked="" type="checkbox"/>	Manager
Edit	Sales_Person	psale	abpsale@sales28.com	sales.person	<input checked="" type="checkbox"/>	sales person
Edit	User_Integration	integ	integration@00dp000009davyauu.com		<input checked="" type="checkbox"/>	Analytics_Cloud_Integration_User
Edit	User_Security	sec	insightssecurity@00dg000009davyauu.com		<input checked="" type="checkbox"/>	Analytics_Cloud_Security_User

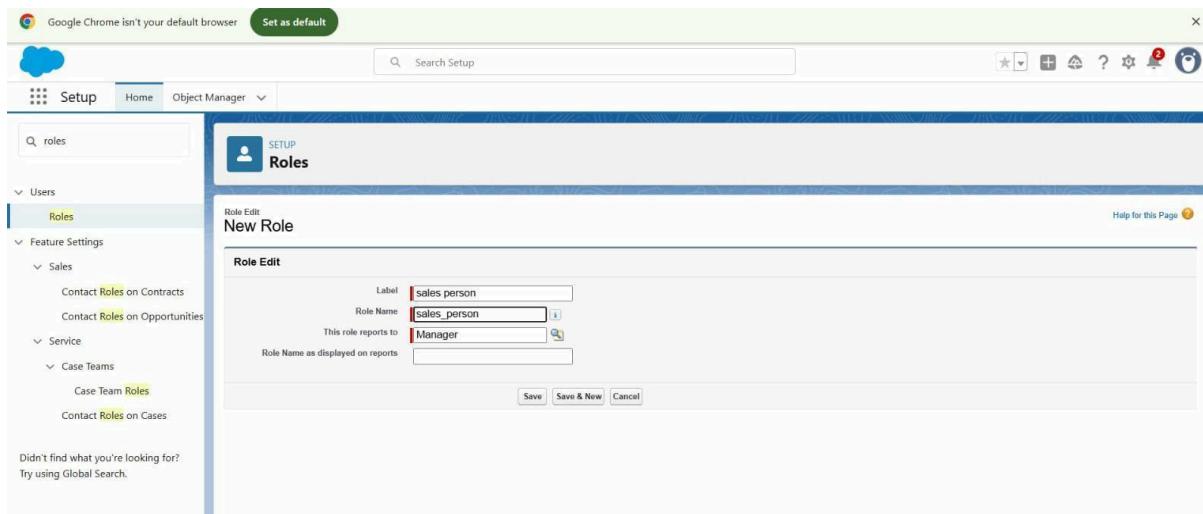
A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

Very humid Now

ENG IN 20:36 05-09-2025

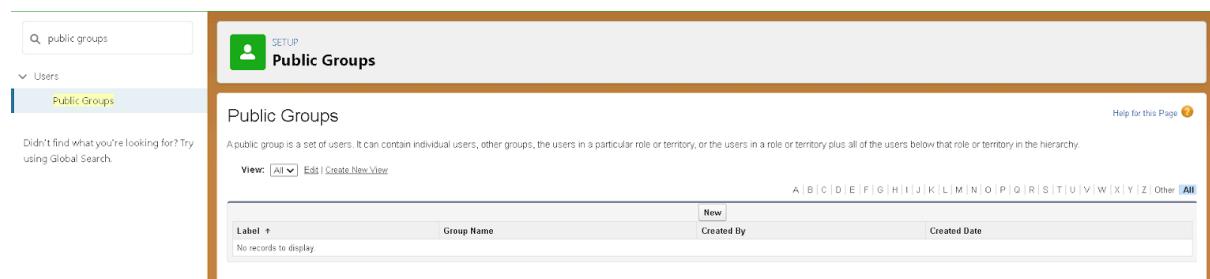
creating another users

1. Repeat the steps to create a new user
2. Fill in the details as before, but change these:
 - **Role:** sales person
 - **User License:** Salesforce Platform
 - **Profile:** sales person
3. Complete other fields as needed
4. Click Save

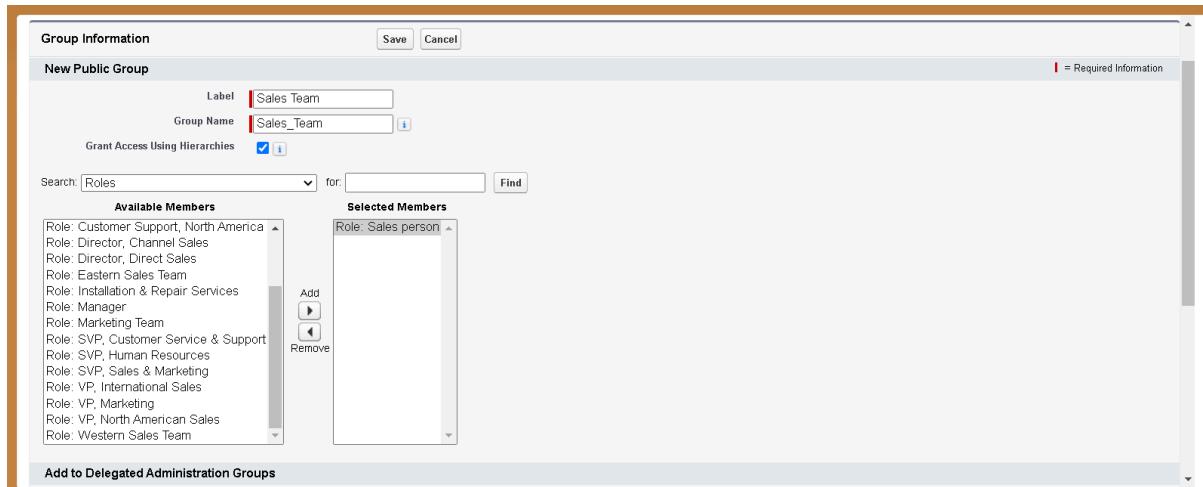


Creating New Public Group

1. Go to **Setup**
2. In the **Quick Find** box, type **Public Groups**



3. Click **Public Groups → New**
4. Enter **Label:** sales team (Group Name auto-fills)
5. Search for **Roles**
6. In **Available Members**, select **Sales person**
7. Click **Add** to move it to **Selected Members**
8. Click **Save**



Creating Sharing settings

1. Go to **Setup**
2. In **Quick Find**, type **Sharing Settings**
3. Click **Sharing Settings** → Click **Edit**
4. Change **Organization-Wide Default (OWD)** for **Service Records** to **Private**

The screenshot shows the 'Sharing Settings' page under the 'SETUP' tab. The 'Service records' row in the main table has its dropdown menu set to 'Private'. The 'Save' button at the bottom is highlighted with a red box.

5. Click **Save** and **Refresh**
6. Scroll down to **Service Records Sharing Rules** → Click **New**

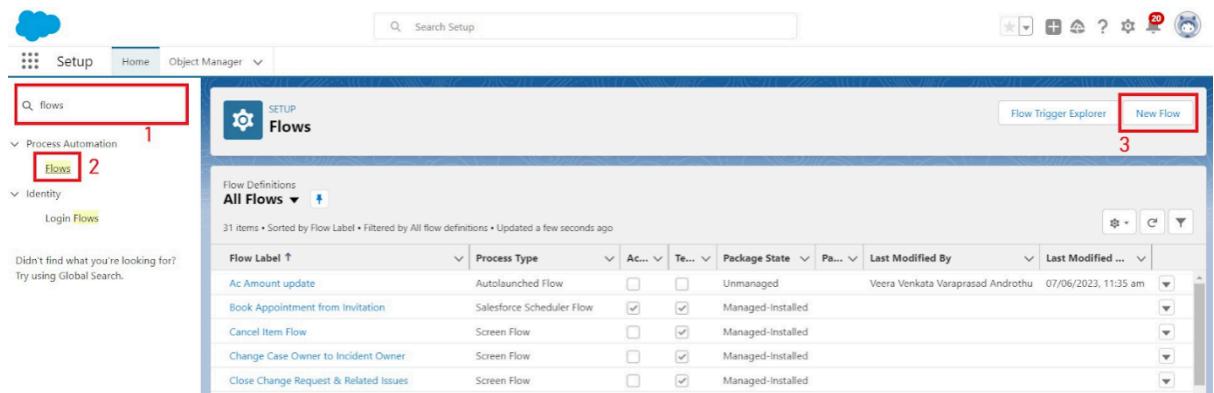
The screenshot shows the 'Service records Sharing Rules' page. The 'New' button is highlighted with a red arrow.

7. Enter **Label**: Sharing setting (Rule Name auto-fills)
8. In **Step 3**: Select records owned by **Roles** → choose **Sales person**
9. In **Step 4**: Share with **Roles** → choose **Manager**
10. In **Step 5**: Set access level to **Read/Write**
11. Click **Save**

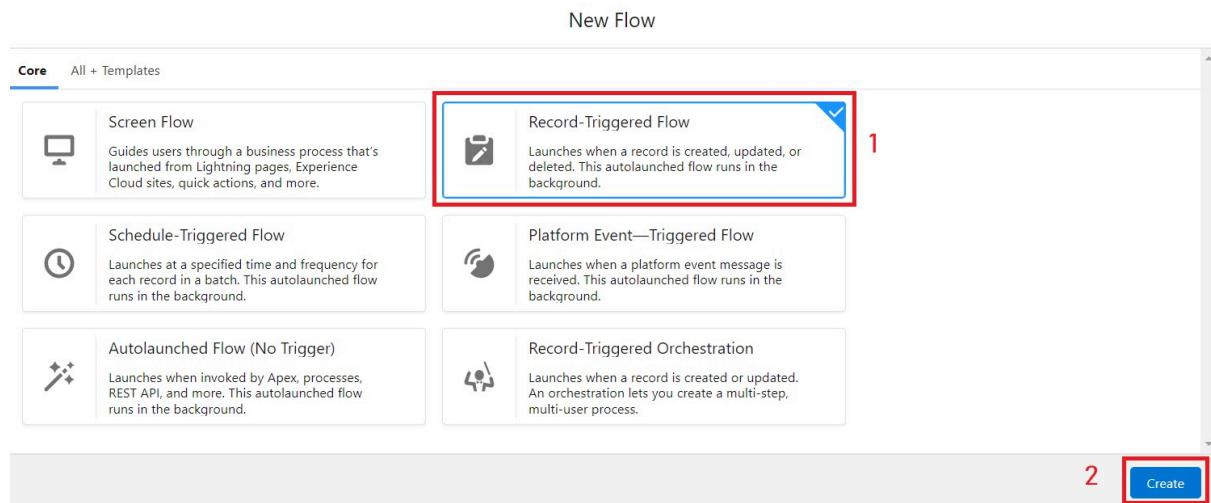
The screenshot shows the 'Sharing Settings' page with a new sharing rule being configured. Arrows point to the 'Label' field ('sharing settings'), 'Rule Name' field ('sharing_settings'), 'Record Owner' dropdown ('Sales person'), 'Share With' dropdown ('Manager'), and the 'Access Level' dropdown ('Read/Write'). The 'Save' button at the bottom is highlighted with a red box.

Create a Flow

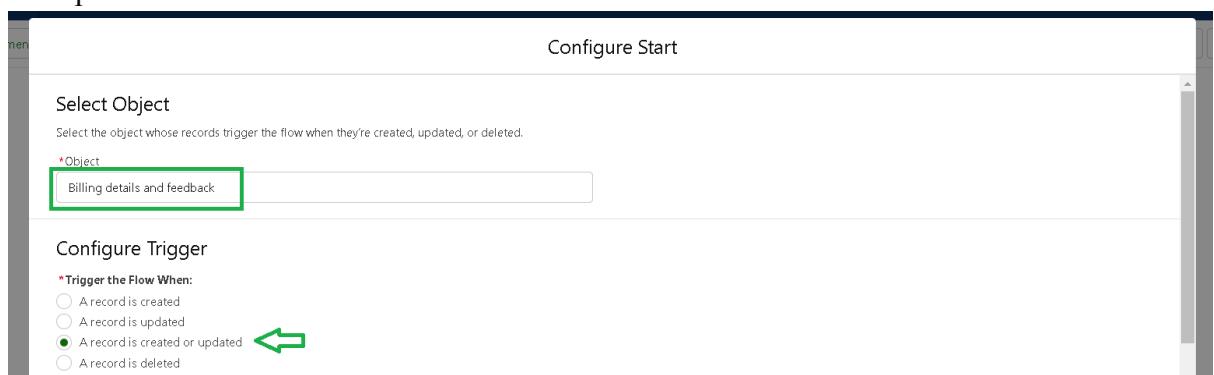
1. Go to setup and type **Flow** in the quick find box, then click on **Flows** and select **New Flow**.



2. Choose **Record-triggered flow** and click **Create**



3. Select the object as **Billing details and feedback** from the drop-down list.
4. Set the trigger to run when **A record is Created or Updated**.
5. Optimize the flow for **Actions and Related Records** and click **Done**.



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

▼

* Optimize the Flow for:

Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

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

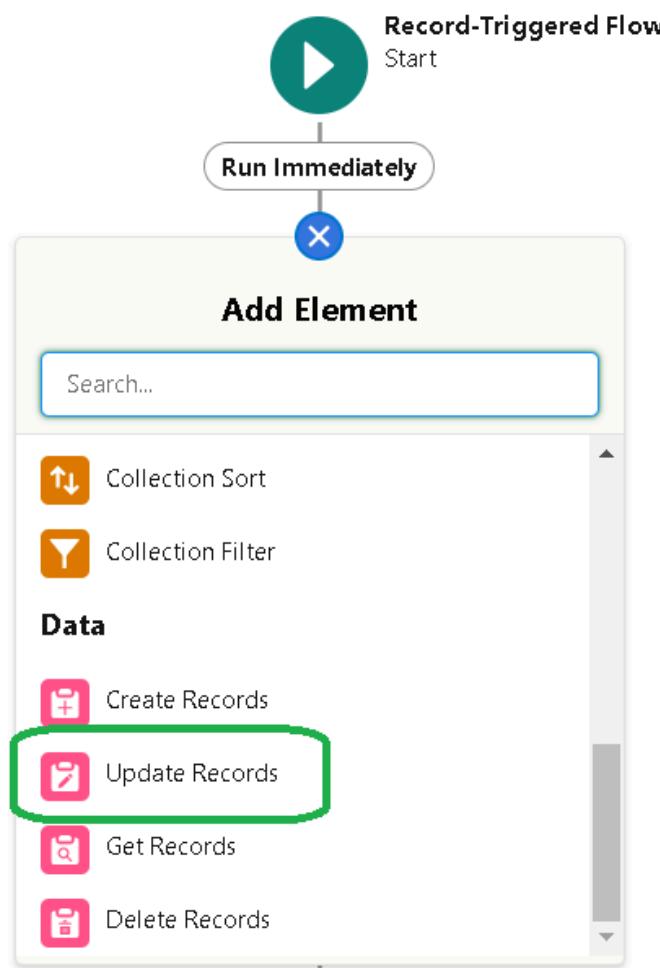
3

4

Cancel

Done

- Under the Record-triggered Flow, click the + symbol and select **Update Records**.



- Give the label name **Amount Update** (API name auto-fills).

Edit Update Records

Update Salesforce records using values from the flow.

*Label	*API Name
Amount Update	Amount_Update

Description

***How to Find Records to Update and Set Their Values**

- Use the billing details and feedback record that triggered the flow
- Update records related to the billing details and feedback record that triggered the flow
- Use the IDs and all field values from a record or record collection
- Specify conditions to identify records, and set fields individually

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

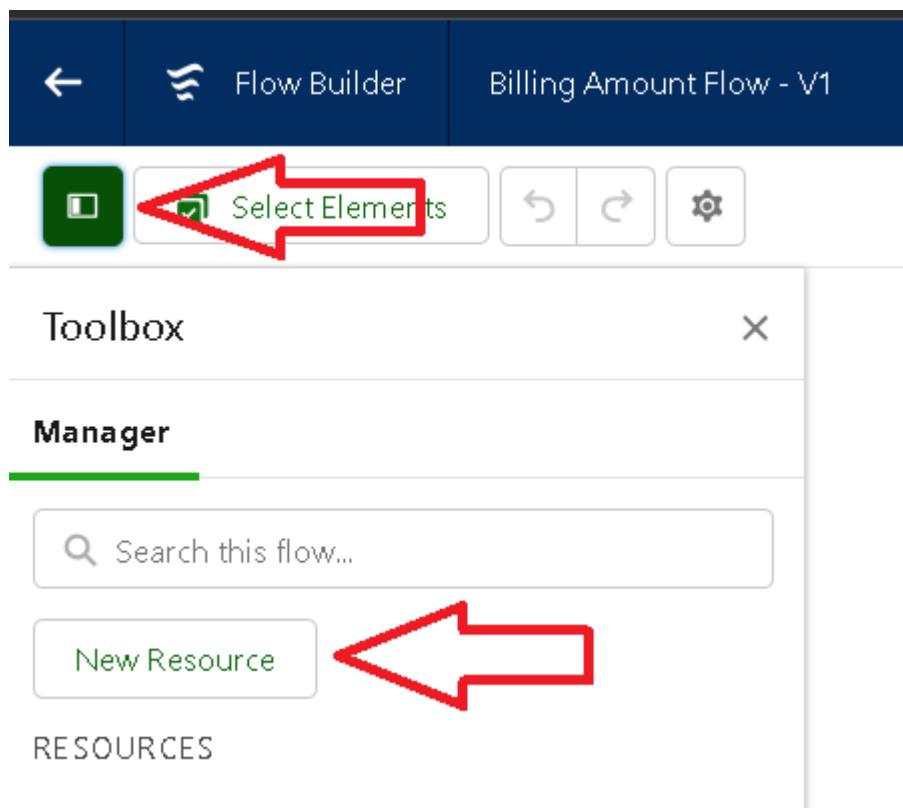
Set Field Values for the Billing details and feedback Record

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

+ Add Field

Cancel Done

8. Set the filter condition as **All Conditions are met (AND)**, with field **Payment_Status__c** equals **Completed**.
9. Set the field value for **Payment_Paid__c** to **{!\$Record.Service_records__r.Appointment__r.Service_Amount__c}**.
10. Click **Done**.
11. From the toolbox on the top left, click **New Resource**.



12. Select resource type **Text Template**.
13. Enter API name as **alert**.
14. Change view to **Plain Text**.

The screenshot shows the 'Edit Text Template' dialog box. At the top, it says 'Edit Text Template'. Below that, there is a field labeled 'API Name' with the value 'alert' entered. To the right of the API name field is a 'Description' field containing a large empty text area. Below these fields is a section labeled 'Body' with a sub-label 'Insert a resource...'. To the right of the 'Insert a resource...' field is a 'View as Plain Text' dropdown menu, which is highlighted with a red arrow. In the body field, there is a line of text: 'Dear {!\$Record.Service_records__r.Appointment__r.Customer__Name__r.Name},'. At the bottom right of the dialog box are two buttons: 'Cancel' and 'Done', with 'Done' being highlighted with a red arrow.

15. Paste the given syntax in the body field.
16. Click on **Add Element (+)** and select **Action**.
17. In the action search bar, type **Send Email** and select it.
18. Give the **Label as Email Alert** (API name auto-fills).
19. In **Set Input Values**, enable the **Body** field.
20. For **Body**, select the text template created earlier: **{!alert}**.

21. In **Recipient Address List**, add the email field from the record:

{!\$Record.Service_records_r.Appointment_r.Customer_Name_r.Gmail_c}

22. For **Subject**, type: **Thank You for Your Payment - Garage Management.**

23. Click **Done**.

Edit Action

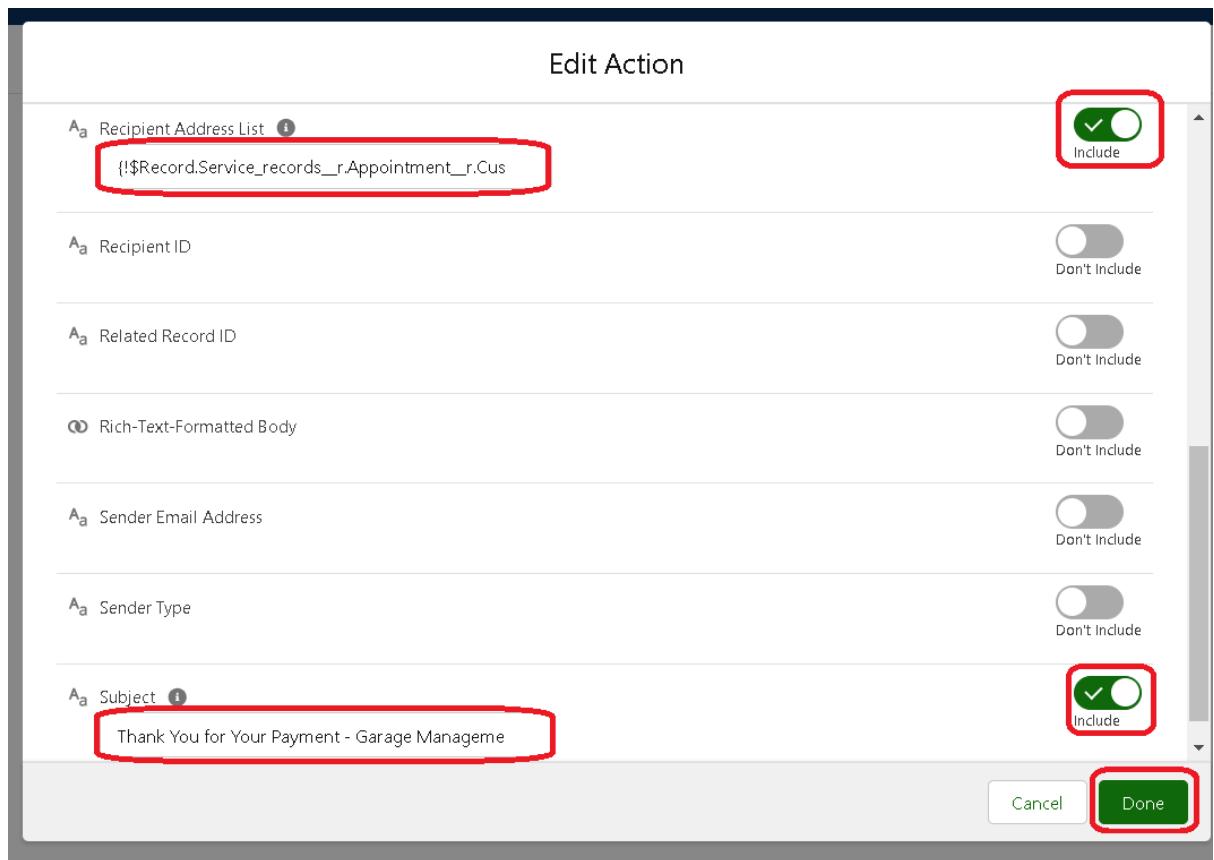
Use values from earlier in the flow to set the inputs for the "Send Email" core action. To use its outputs later in the flow, store them in variables.

*Label	*API Name
Email Alert	Email_Alert

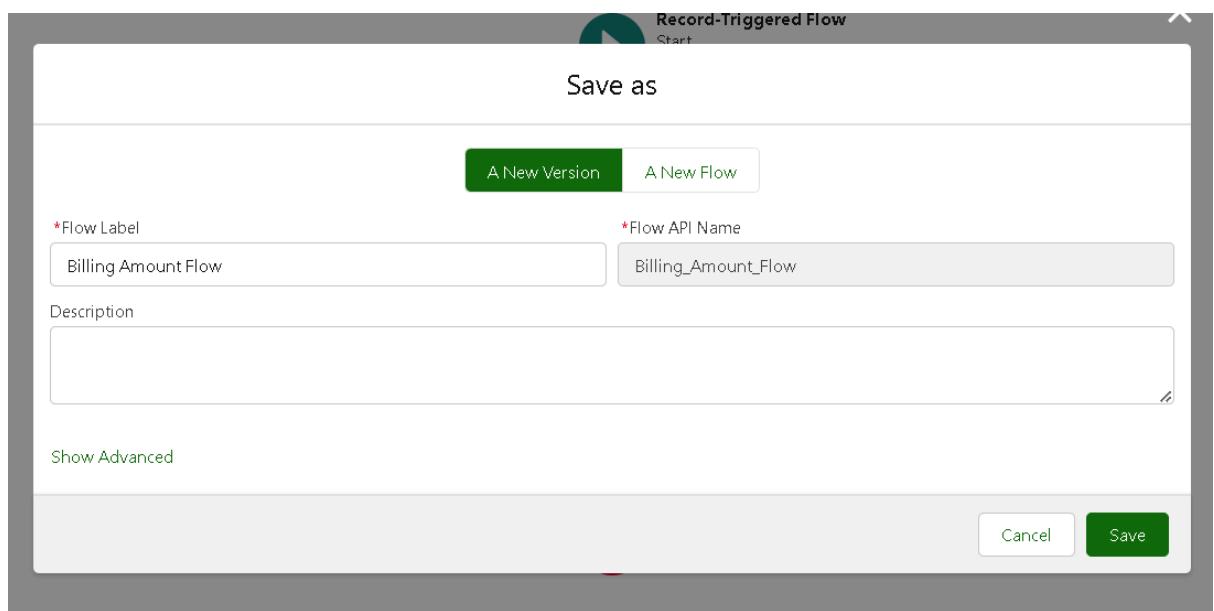
Description

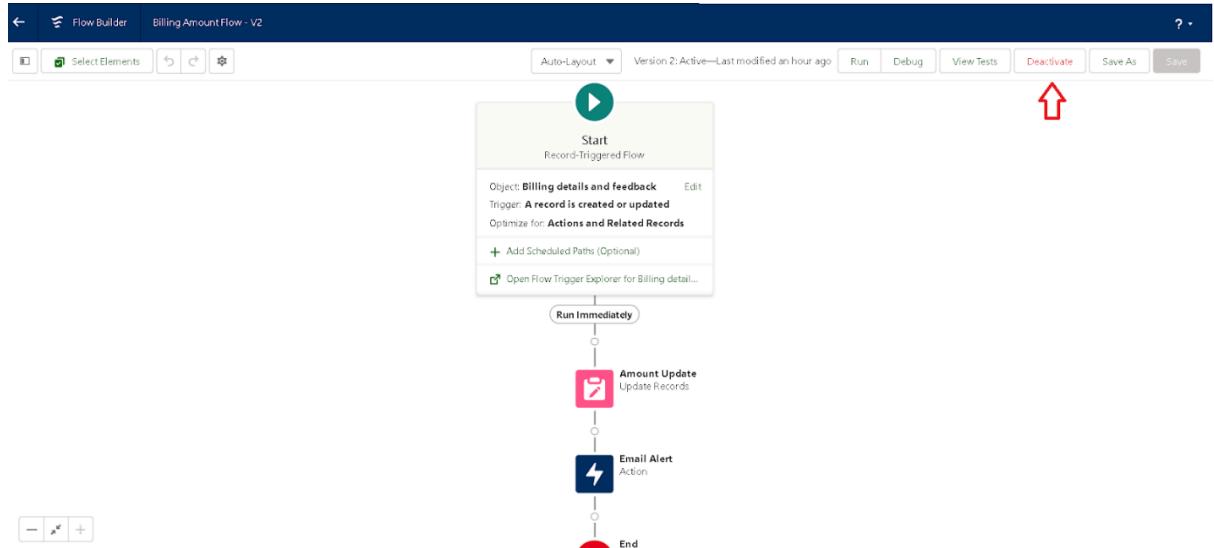
Set Input Values for the Selected Action

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



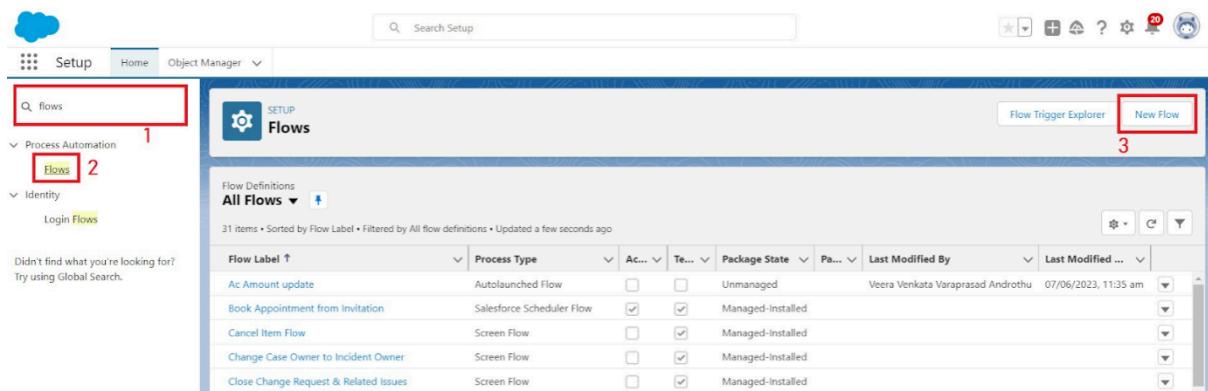
24. Click **Save**, enter a **Flow Label** (API name auto-populates), then click **Save** again.
25. Finally, click **Activate**.



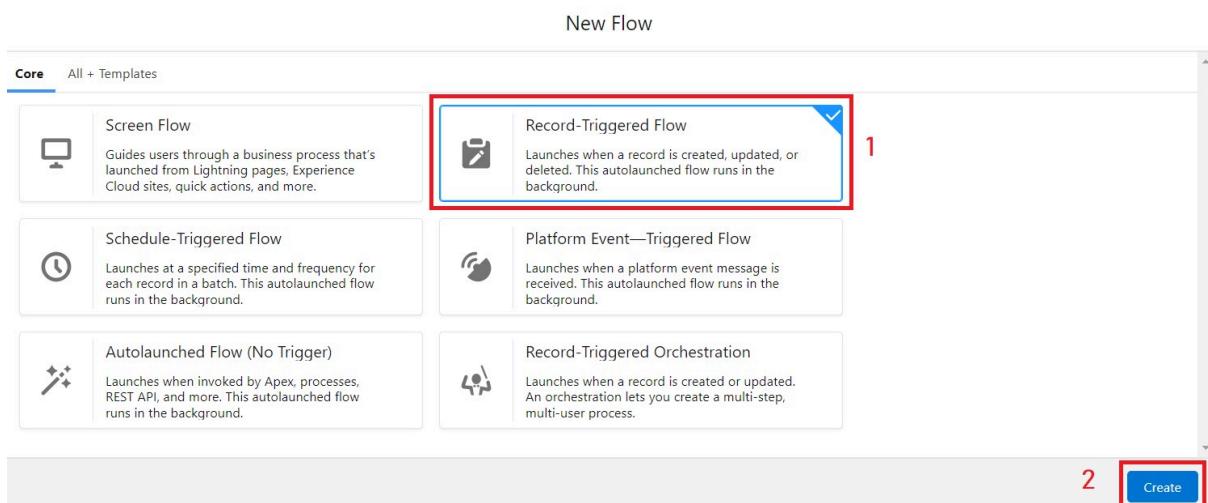


Create another Flow

1. Go to **Setup**, type **Flow** in the Quick Find box, and click on **Flows**.



2. Click on **New Flow**.
3. Select **Record-Triggered Flow** and click **Create**.



4. Choose the object **Service records** from the dropdown.

5. Set trigger to **A record is Created or Updated**.
6. Optimize for **Actions and Related Records**, then click **Done**.
7. Click the + symbol and select **Update Records**.
8. Set filter condition: **All Conditions Are Met (AND)**
 - Field: **Quality_Check_Status__c**
 - Operator: **Equals**
 - Value: **True**
9. Set field values:
 - Field: **Service_Status__c**
 - Value: **Completed**

Set Filter Conditions

Condition Requirements to Update Record

All Conditions Are Met (AND) ▾

Field	Operator	Value
Quality_Check_Status__c	Equals	True X Delete

+ Add Condition

Set Field Values for the Service record Record

Field	Value
Service_Status__c	Completed Delete

+ Add Field

10. Click **Done**.
11. Click **Save**, enter the flow label as **Update Service Status** (API name auto-fills).
12. Click **Save**, then **Activate**.

Apex handler

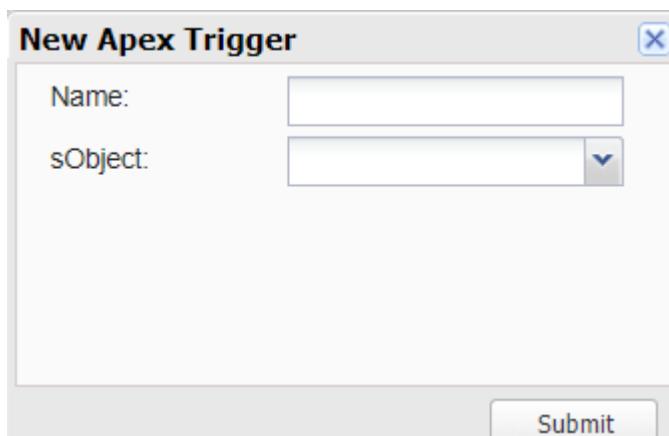
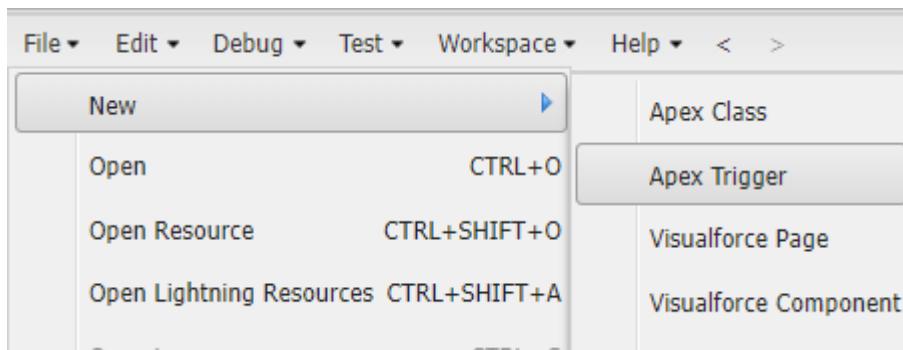
1. **Log in** to your **Trailhead account**.
2. Click the **gear icon** (⚙️) in the top-right corner.
3. Select **Developer Console** — a new window will open.
4. In the Developer Console, click on **File** in the toolbar.
5. Go to **New** → select **Apex Class**.
6. In the pop-up, enter the class name: **AmountDistributionHandler**.
7. Click **OK**.

Trigger Handler :

How to create a new trigger :

1. While logged into your **Trailhead account**, click the **gear icon** (⚙️) in the top-right corner.
2. Select **Developer Console** — it will open in a new window.

3. In the Developer Console, go to the **File** menu.
4. Click on **New** → then select **Trigger**.
5. In the pop-up window:
 - **Trigger Name:** AmountDistribution
 - **sObject:** Appointment__c
6. Click **Submit**.



```

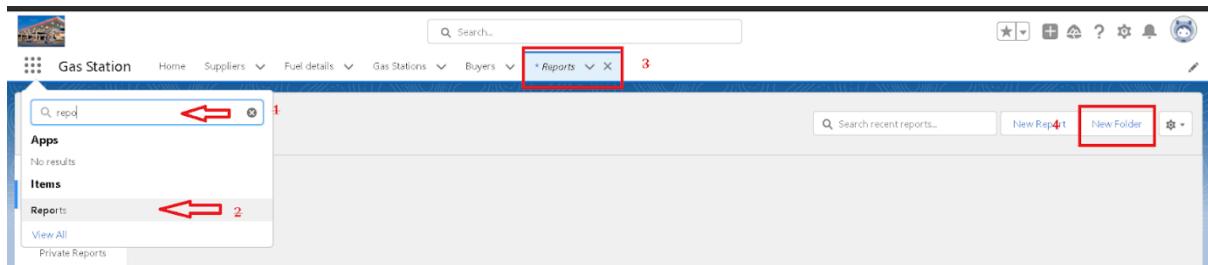
trigger AmountDistribution on Appointment__c (before insert, before update) {
    if(trigger.isbefore && trigger.isinsert || trigger.isupdate){
        AmountDistributionHandler.amountDist(trigger.new);
    }
}

```

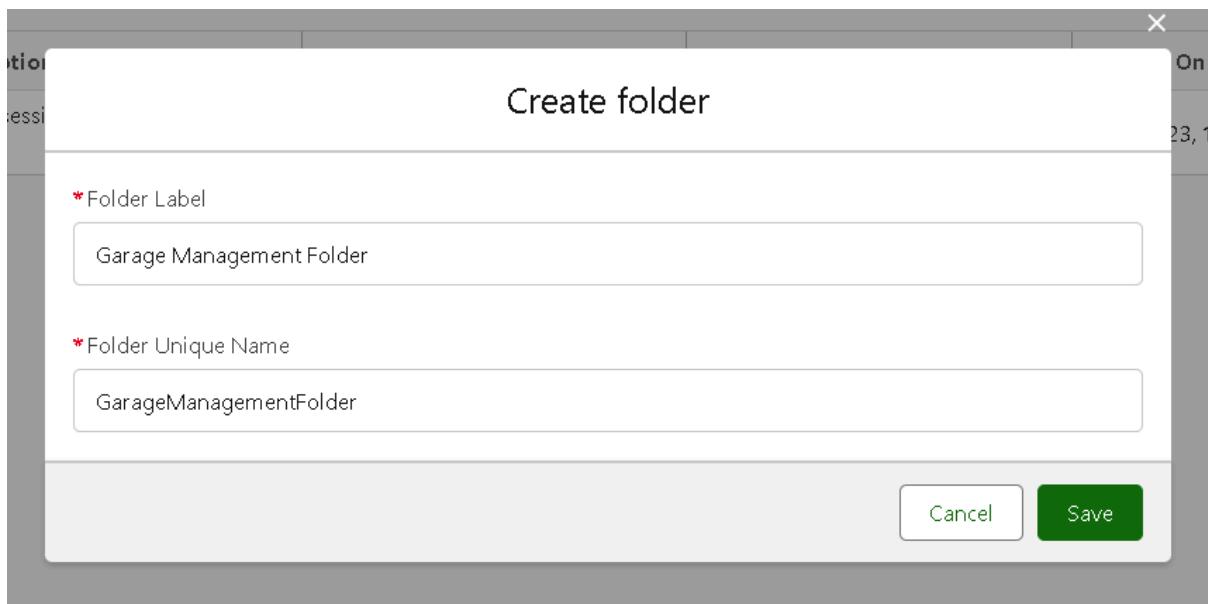
The screenshot shows the code editor in the Salesforce Developer Console. The file is named 'AmountDistribution.apxt'. The code contains a trigger for the 'Appointment__c' object, firing before insert or update. It calls a method 'amountDist' from a class 'AmountDistributionHandler' on the new records.

create a report folder

1. Click on the **App Launcher** (grid icon) and search for **Reports**.
2. Click on the **Reports** tab.
3. Click on **New Folder**.

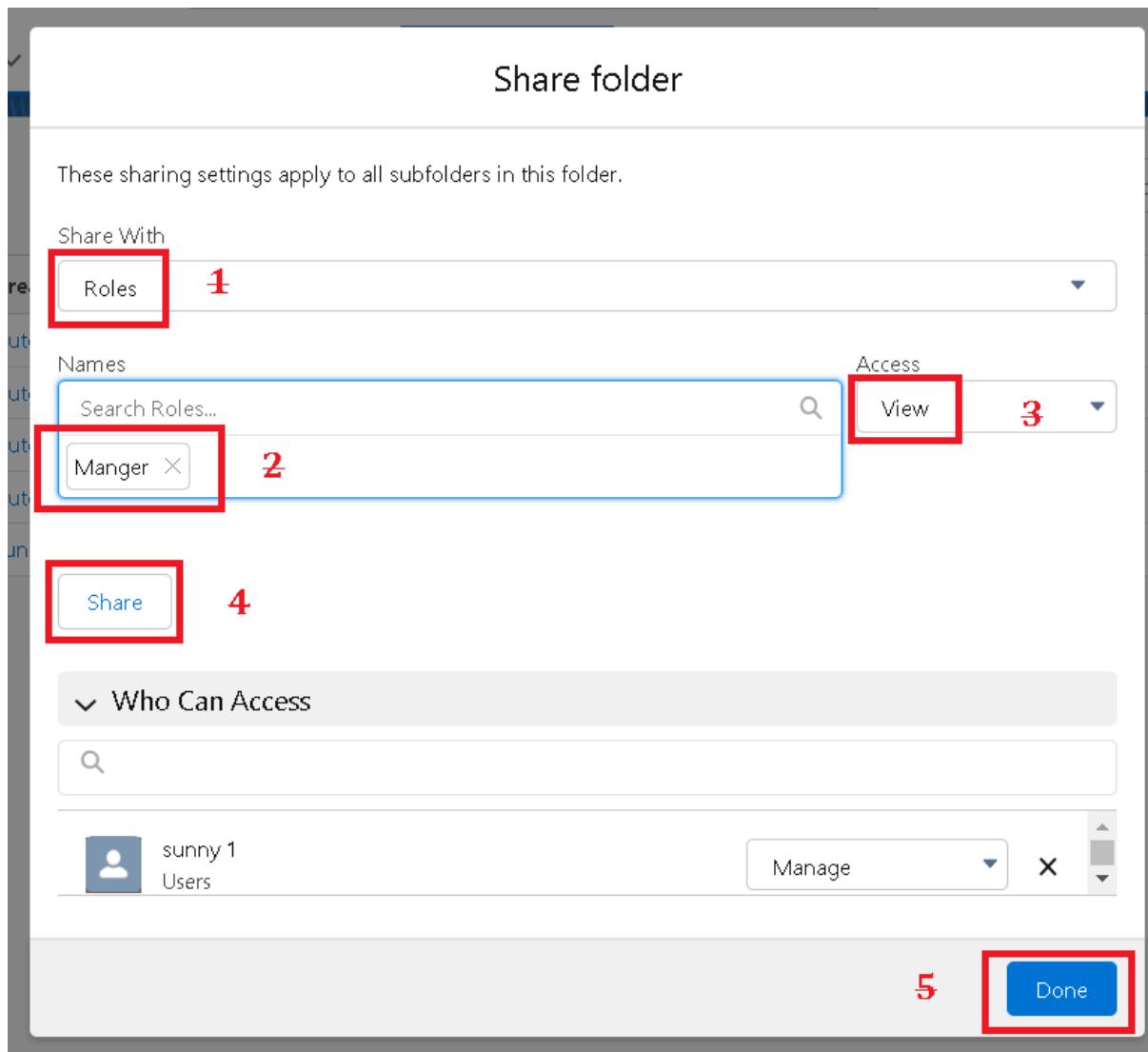


4. Enter the **Folder Label** as **Garage Management Folder** (Unique Name auto-fills).
5. Click **Save**.



Sharing a report folder

1. Go to the **App** and click on the **Reports** tab.
2. Click on **All Folders** on the left side.
3. Find the **Garage Management Folder**, click the **dropdown arrow** next to it.
4. Click on **Share**.
5. In the **Share With** field, select **Roles**.
6. In the **Name** field, search and select **Manager**.
7. Set the access level to **View**.
8. Click **Share**, then click **Done**.



Create Report Type

1. Go to **Setup**.
2. In the **Quick Find** box, type **Report Type** and click on **Report Types**.
3. Click **Continue** if prompted.
4. Click **New Custom Report Type**.

The screenshot shows the 'Report Types' page under 'Setup'. The sidebar has a 'Report Types' link (1) with a green arrow pointing to it. The main area shows a list of 'All Custom Report Types' with a 'New Custom Report Type' button (2) at the top. A green arrow points to this button. The list includes items like 'Bot Metrics Daily Summer '23', 'Bot Metrics Hourly Summer '23', 'Screen Flows', and 'Session Metrics Summer '23'. Each item has an 'Edit | Del' link and a description.

5. Enter the **Report Type Label** as **Service information** (Name auto-fills).

6. Keep the **Description** as it is.
7. Set **Store in Category** to **Other Reports**.
8. Set **Deployment Status** to **Deployed**, then click **Next**.

Report Type Focus

Specify what type of records (rows) will be the focus of reports generated by this report type.
Example: If reporting on "Contacts with Opportunities with Partners," select "Contacts" as the primary object.

Identification

- Primary Object: Customer Details (highlighted with a green arrow)
- Report Type Label: Service information (highlighted with a green arrow)
- Report Type Name: Service_information (highlighted with a green arrow)
- Description: Service information (highlighted with a green arrow)
- Store in Category: Other Reports (highlighted with a green arrow)

Deployment

A report type with deployed status is available for use in the report wizard. While in development, report types are visible only to authorized administrators and their delegates.

- Deployment Status: Deployed (highlighted with a green arrow)

Next **Cancel**

New Custom Report Type
Service information

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.

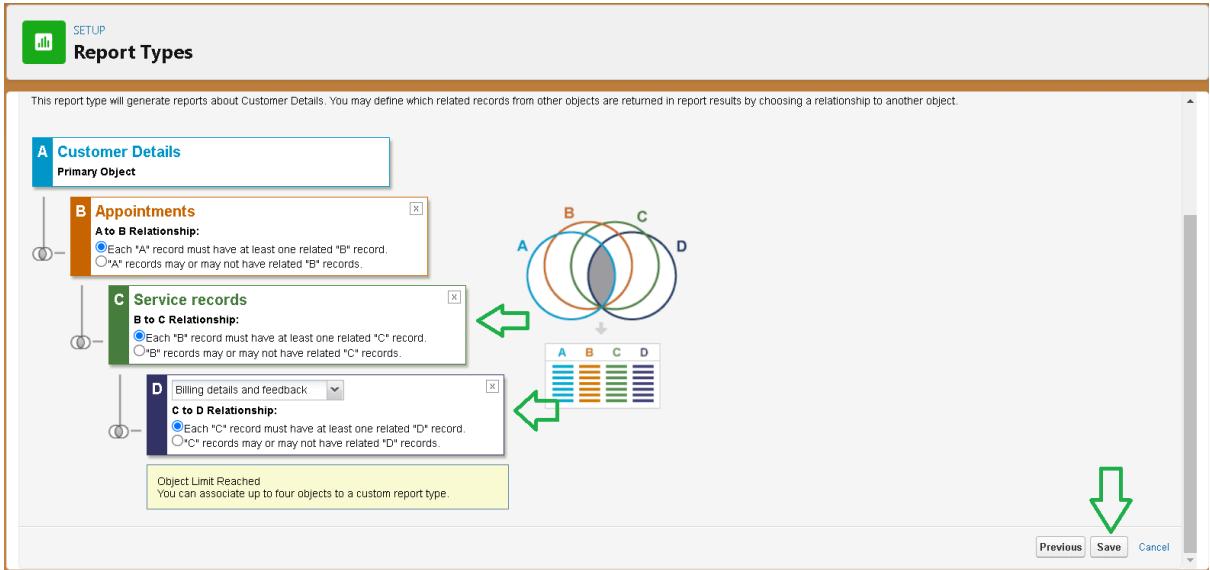
A Customer Details
Primary Object

B **Select Object:**
--Select Object--
Activities
Appointments (highlighted with a green arrow)
Duplicate Record Items

Relationship Diagram: A Venn diagram with two overlapping circles labeled A and B. Below the diagram is a downward arrow pointing to a grid divided into two columns, one blue and one orange, representing the relationship between the selected objects.

Previous **Save** **Cancel**

9. Under the **Related Object** box, click **Select Object**.
10. Choose the object **Appointment**.
11. After selecting **Appointment** as the related object, click + **Click to relate another object**.
12. Choose the related object **Service records**.
13. Again, click + **Click to relate another object** under Service records.
14. Select the related object **Billing details and feedback**.
15. Click **Save**.



Create Report

1. Go to the App, then click on the Reports tab.
2. Click New Report.

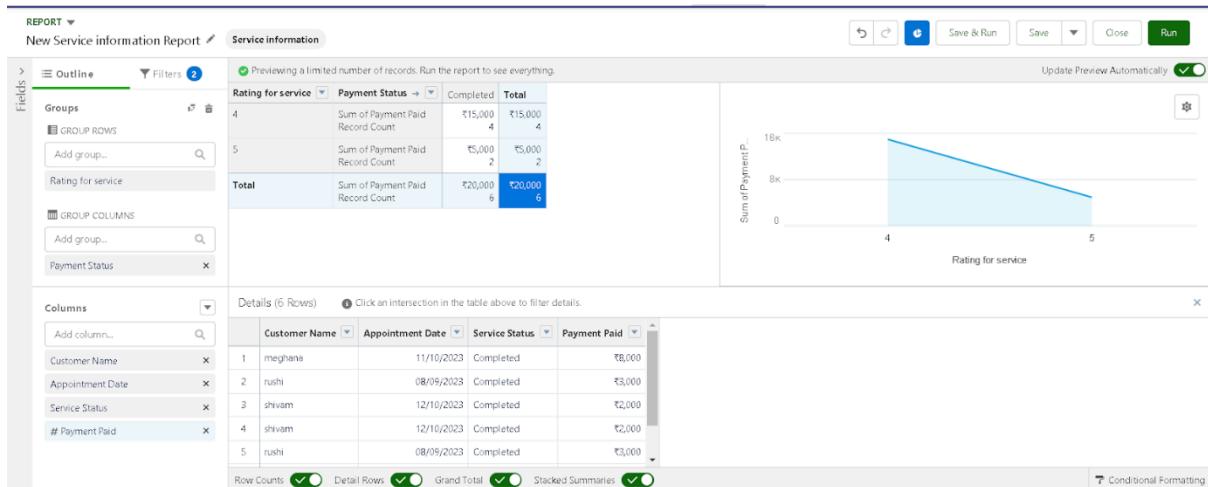
3. In Category, select Other Reports.

4. Search for Service Information, click on it, then click Start Report.

5. In the Outline pane, under Columns, add the following fields:

- Customer Name
- Appointment Date

- Service Status
 - Payment Paid
6. Remove any unnecessary fields.
 7. Under **Group Rows**, add:
 - Rating for Service
 - Payment Status
 8. Click on Add Chart, then choose **Line Chart**.
 9. Click **Save**.
 10. Enter **Report Name** as **New Service information Report** (Unique Name auto-fills).
 11. Select the **Garage Management Folder** you created earlier.
 12. Click **Save**.

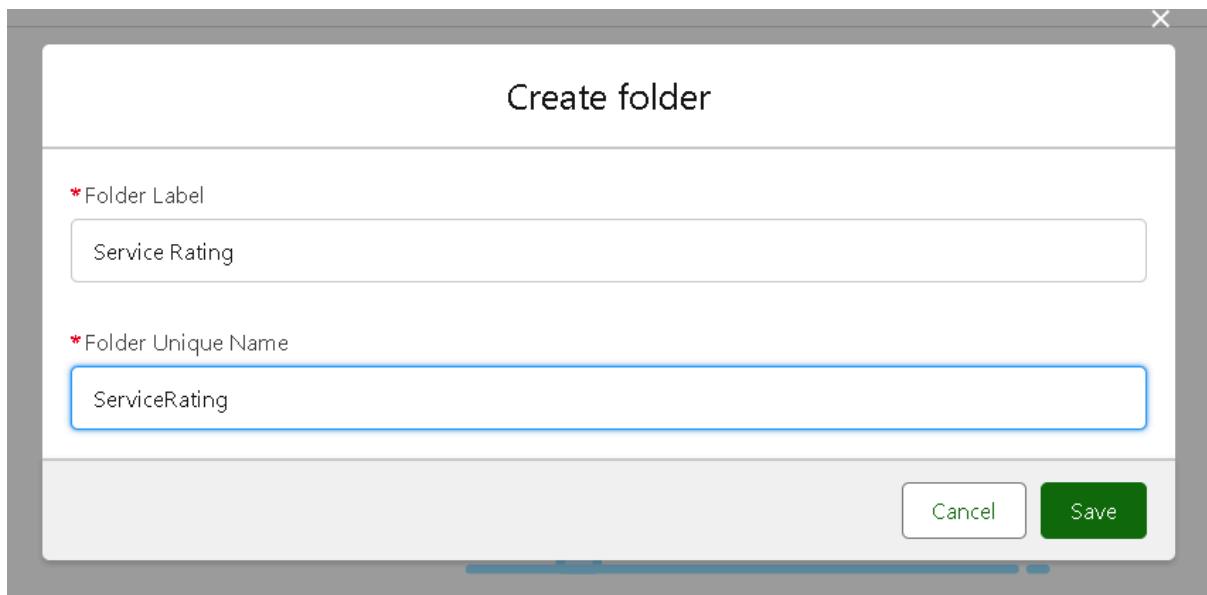


The screenshot shows the 'Save Report' dialog box. It has fields for 'Report Name' (set to 'New Service information Report'), 'Report Unique Name' (auto-filled as 'New_Service_information_Report_oVu'), 'Report Description' (empty), and 'Folder' (set to 'Garage Management Folder'). A green arrow points to the 'Report Name' field. Another green arrow points to the 'Folder' field. At the bottom right are 'Cancel' and 'Save' buttons.

Create Dashboard Folder

1. Click on the **App Launcher** and search for **Dashboard**.
2. Click on the **Dashboard** tab.
3. Click **New Folder**.
4. Enter the folder label as **Service Rating dashboard**.
5. Folder unique name will auto-populate.

6. Click **Save**.



7. Now, follow the same sharing steps you did for the reports folder:
 - Click the dropdown arrow on the new folder.
 - Select **Share**.
 - Share with **Roles**, search for **Manager** role.
 - Give **View** access.
 - Click **Share** and then **Done**.

Create Dashboard

1. Go to the app and click on the **Dashboards** tab.
2. Give the dashboard a **Name**.
3. Select the **Service Rating dashboard** folder you created.
4. Click **Create**.

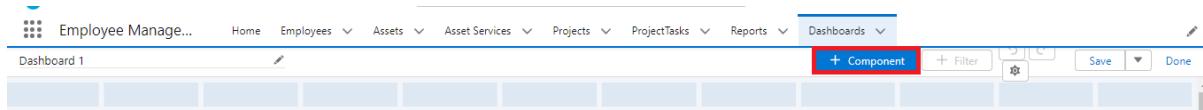
New Dashboard

* Name
Customer review

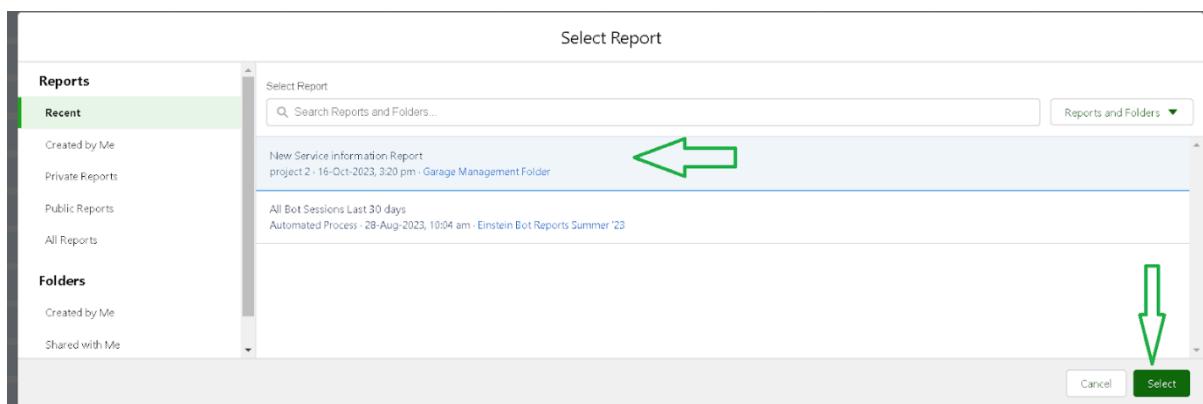
Description

Folder
Service Rating

5. Click Add Component.



6. Select a Report and click Select.

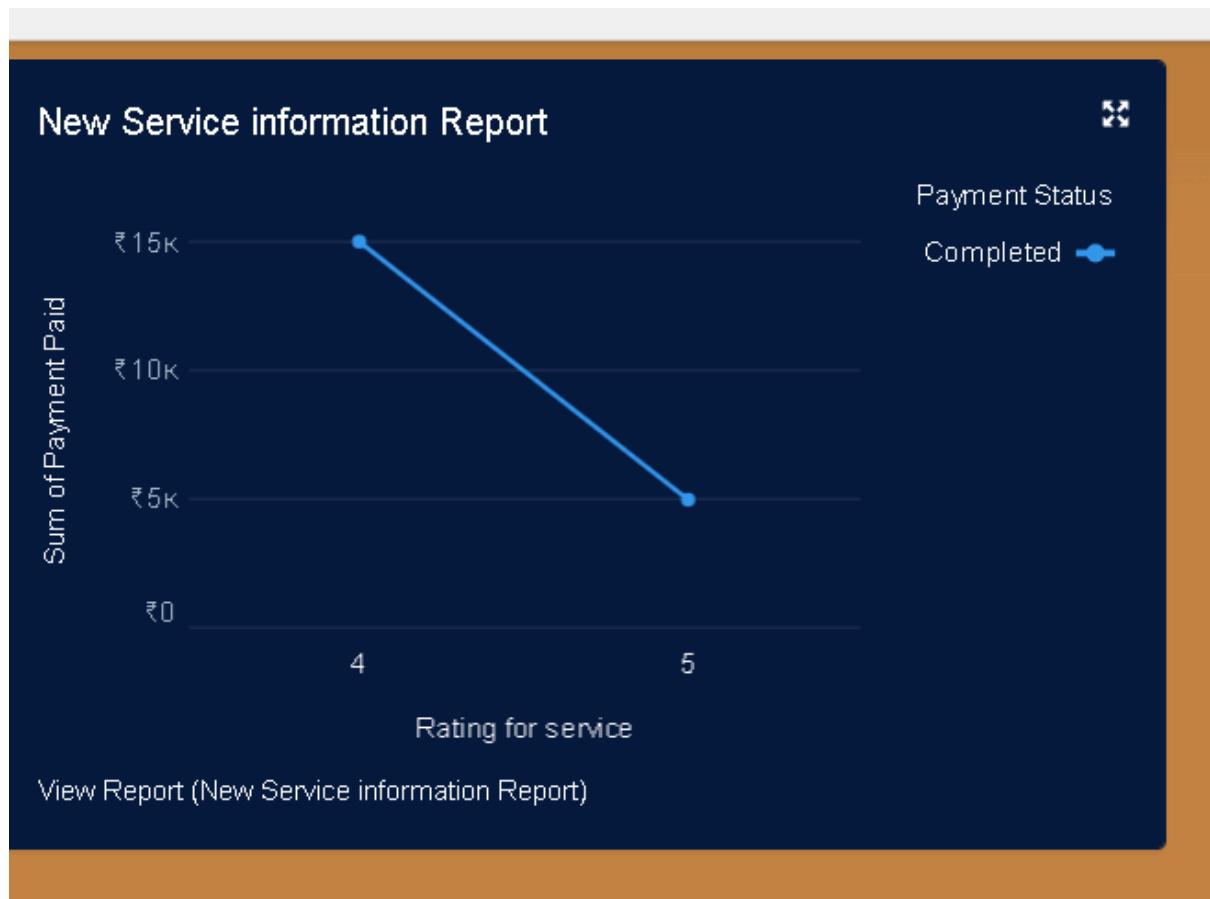


7. Choose the Line Chart type.

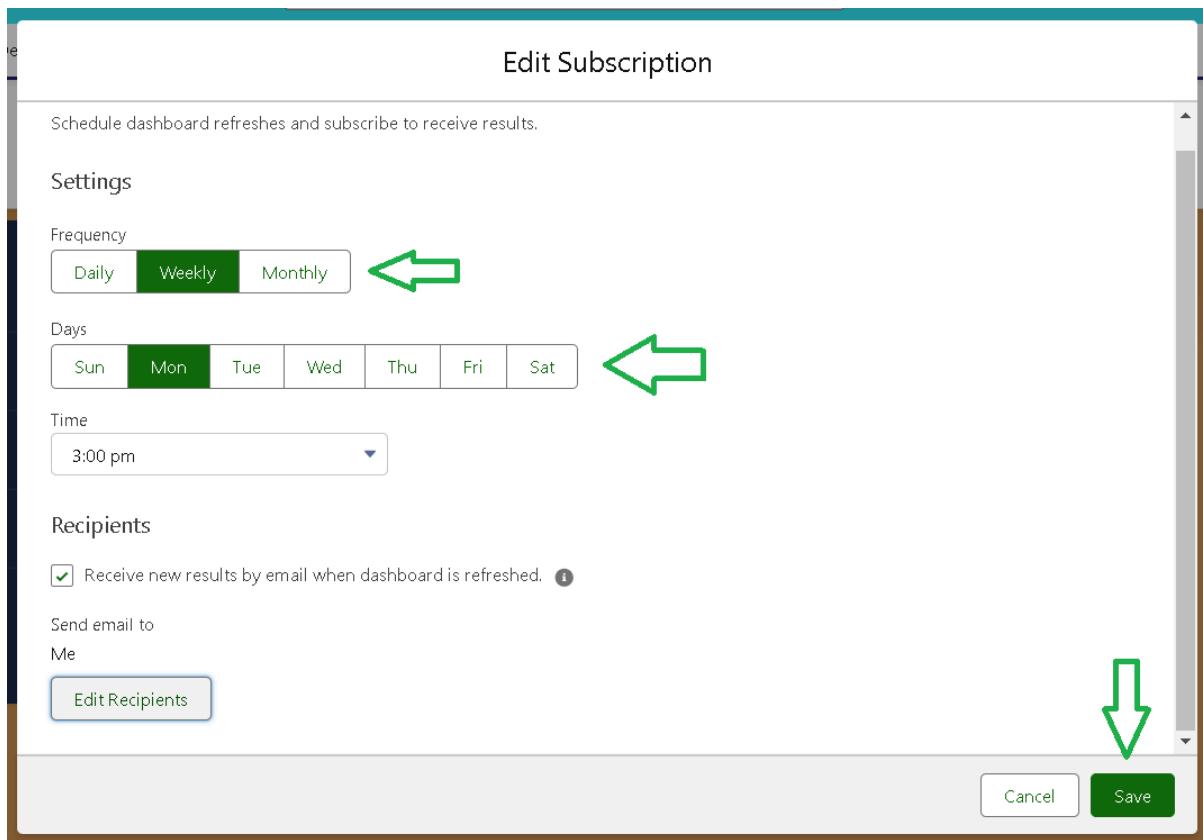
8. Change the theme if needed.

9. Click Add, then Save, and then Done.

10. Preview appears below.

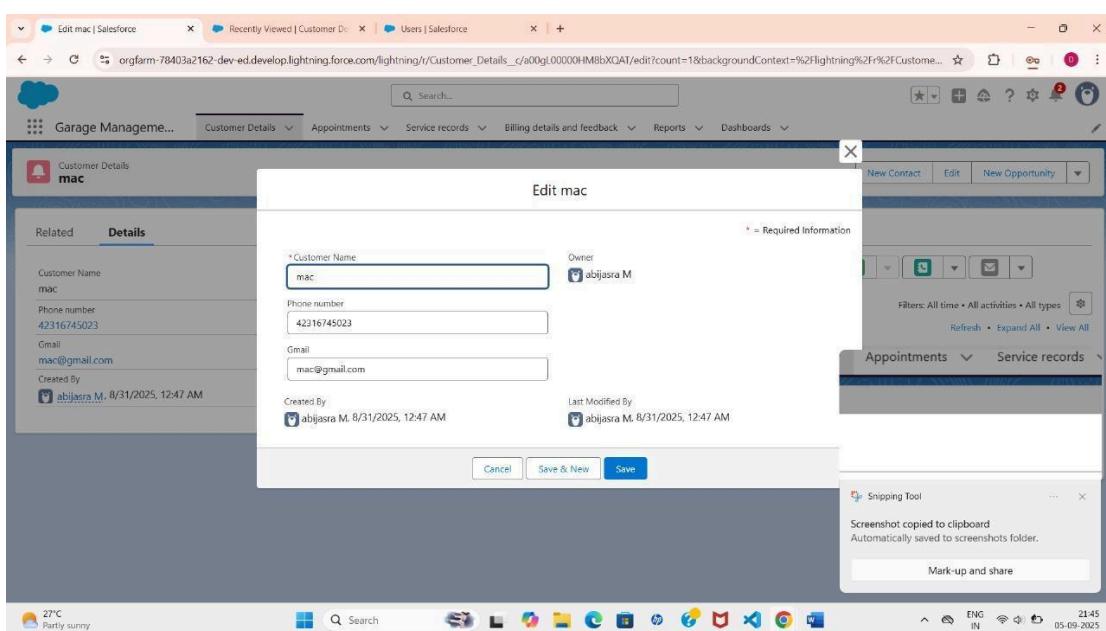


11. Click **Subscribe** on the top right.
12. Set frequency to **Weekly**.
13. Choose the day as **Monday**.
14. Click **Save**.

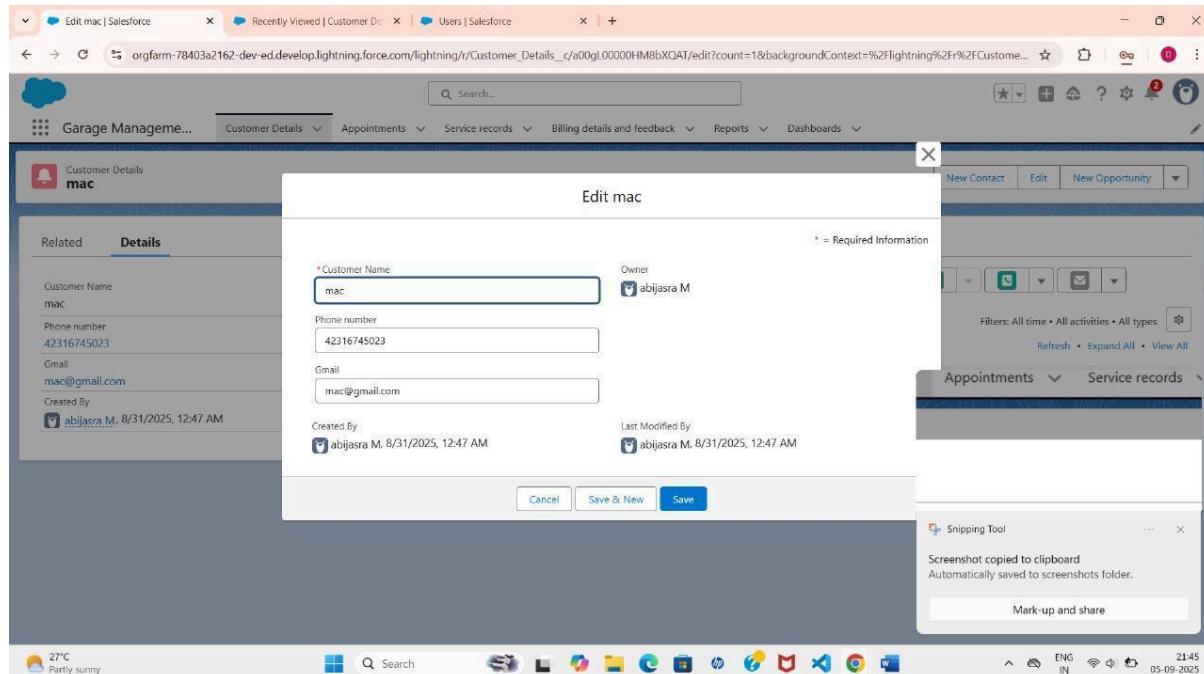


creating records

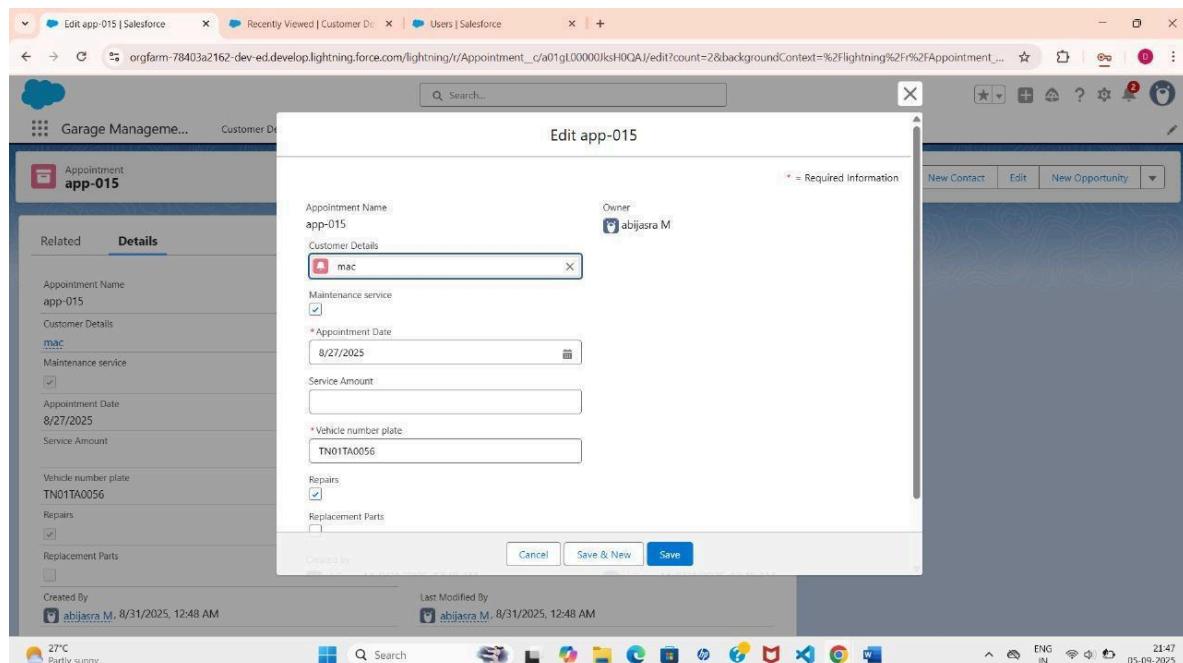
1. Click the **app launcher** (left side).
2. Search and open **Garage Management**.
3. Go to **Customer Details** tab.
4. Click **New**, fill in the details, and click **Save**.



5. Go to **Appointment** tab.
6. Select the created customer, enter an appointment date earlier than today.
7. Enter the vehicle number plate (follow validation).
8. Choose the needed services and click **Save** to see Service Amount.

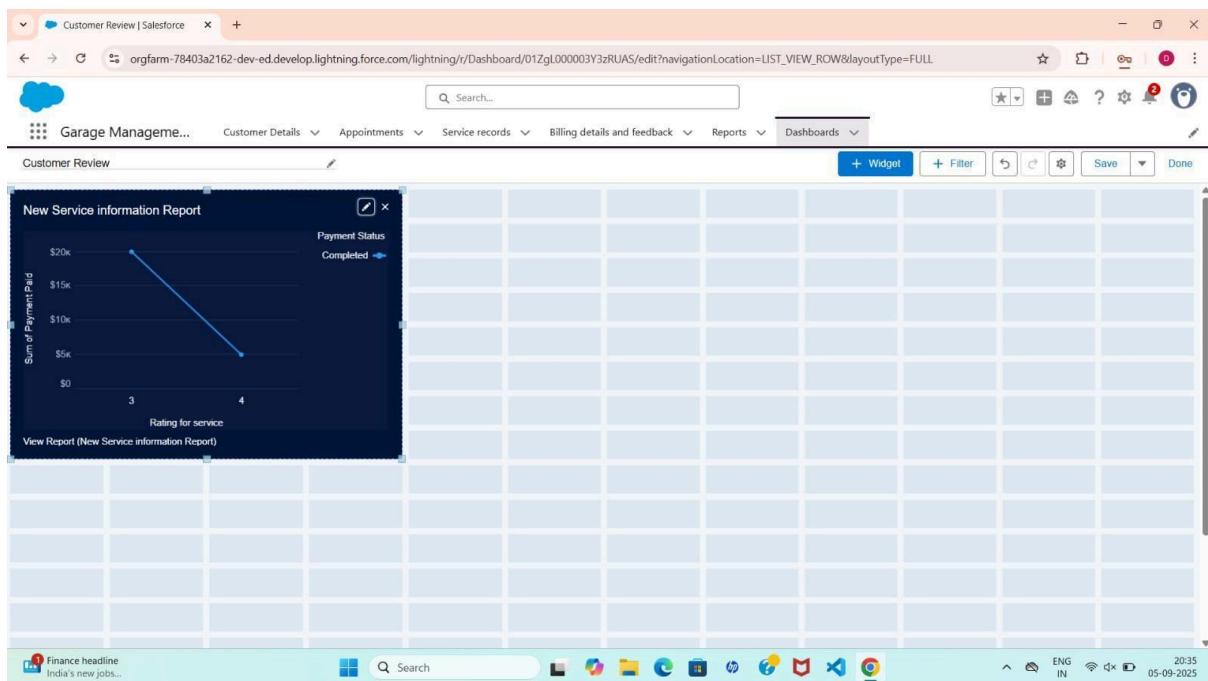
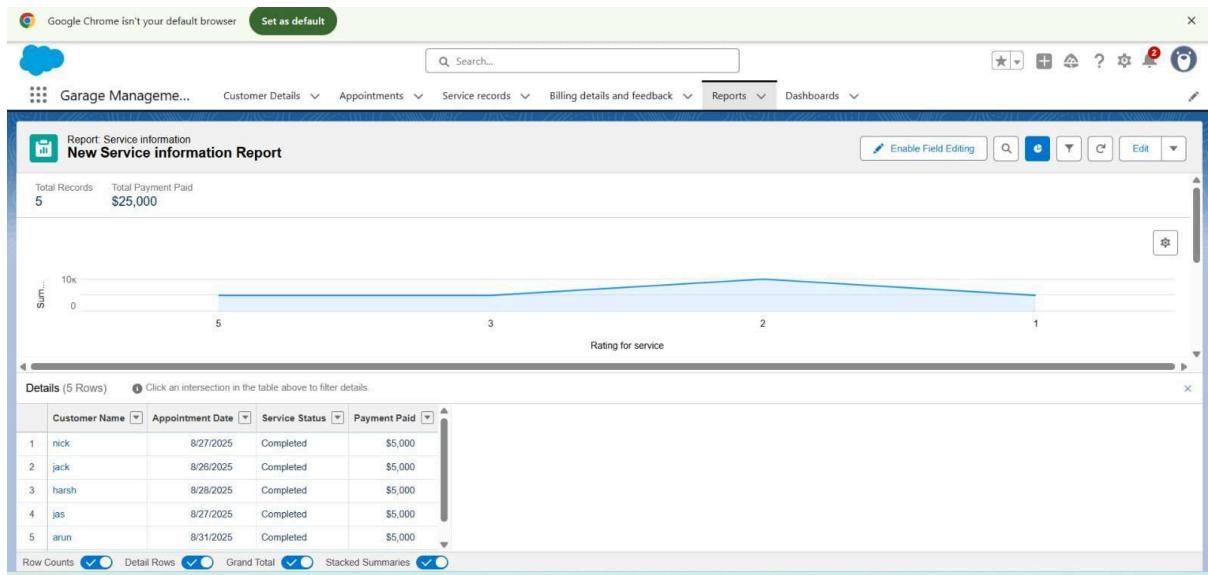


9. Go to **Service Record** tab.



10. Select the appointment, ensure “Started” is selected by default, and click **Save**
11. Open the record, check **Quality Check Status** as true, and click **Save**.

Conclusion :



Our Vision

- The Garage Management System brings automation to traditional garage processes.
- It improves efficiency in service management and billing.
- Inventory tracking becomes more accurate and reliable.
- Customer satisfaction is enhanced through transparency and timely updates.
- Overall, it ensures smooth operations and long-term sustainability

THANKYOU!

