

Salesforce Virtual Internship Program

SmartInternz

Garage management system

NAME : MICKERLA ANUSH

E-MAIL: 32310332011@gvpce.ac.in

COLLEGE NAME : GAYATRI VIDYA PARISHAD COLLEGE OF ENGINEERING

PROJECT ABSTRACT

The Salesforce-based Garage Management System (GMS) is a sophisticated solution tailored for automotive repair facilities to elevate service quality, streamline operations, and cultivate enduring customer relationships. Leveraging Salesforce's powerful CRM capabilities, GMS offers an intuitive interface and comprehensive features, allowing garages to thrive in a competitive marketplace. T

he system automates critical processes such as appointment scheduling, inventory management, billing, and customer communications. By integrating these functionalities within Salesforce, GMS ensures a seamless and satisfying experience for both customers and staff. This advanced solution empowers automotive repair businesses to deliver top-notch service, optimize workflows, and maintain a competitive edge.

INTRODUCTION

Running an automotive repair shop involves juggling many tasks, from scheduling appointments to managing inventory and billing customers. The Salesforce-based Garage Management System (GMS) is designed to make these tasks easier and more efficient.

This system uses Salesforce's powerful tools to help garages deliver better service and keep operations running smoothly. With GMS, repair shops can automate important tasks like booking appointments, tracking inventory, sending bills, and communicating with customers.

The user-friendly design of GMS ensures that both staff and customers have a pleasant experience. By using this system, garages can stay ahead of the competition, provide excellent service, and manage their business more effectively. GMS not only simplifies daily operations but also provides valuable insights to help make better business decisions.

Project title: Garage management system

1. Project Overview

This project focuses on the development of a Salesforce-based application, "The Garage Management System", a valuable tool for automotive repair facilities, helping them deliver top-notch service, increase operational efficiency, and build lasting customer relationships. With its user-friendly interface and powerful features, GMS empowers garages to thrive in a competitive market while ensuring a seamless and satisfying experience for both customers and staff.

The Garage Management System (GMS) developed on Salesforce is an innovative solution designed to optimize the operations of automotive repair facilities. By automating key processes and integrating various aspects of garage management into a single platform, GMS empowers businesses to operate more efficiently, deliver higher quality service, and build stronger customer relationships.

TASK 1:

1.1 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 :
 - First name & Last name
 - Email
 - Role : Developer
 - Company : College Name
 - County : India
 - Postal Code : pin code
 - Username : should be a combination of your name and company. This need not be an actual email id, you can give anything in the format : username@organization.com
- Click on sign me up after filling these.

1.2 Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.
2. Click on Verify Account
3. Give a password and answer a security question and click on change password.
4. Then you will redirect to your salesforce setup page.

TASK 2:

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.

TASK 3:

Create Appointment 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.

TASK4:

Create Service records Object

To create an object:

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

TASK 5:

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

TASK 6:

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 following highlights:

- Header:** The 'Setup' button is highlighted with a red box and an arrow. The 'Tabs' tab is also highlighted with a red box and an arrow.
- Search Bar:** A search bar containing 'tabs' is highlighted with a red box and an arrow.
- Section Headers:** 'Custom Tabs' and 'Data' are highlighted with red boxes and arrows.
- Table:** A table titled 'Custom Object Tabs' lists various tabs. One specific row for 'Customer Details' is highlighted with a red box and an arrow. This row includes columns for 'Object' (Customer Details), 'Tab Style' (Desk), and 'Description' (created to setup with student activity junction object).
- Action Buttons:** A 'New' button at the top right of the table is highlighted with a red box and an arrow.

1. 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 .
2. Make sure that the Append tab to users' existing personal customizations is checked.
3. Click save.

New Custom Object Tab

Help for this Page 

Step 1. Enter the Details Step 1 of 3

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or [create a new custom object now](#).

Object: 

Tab Style:  

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link: 

Enter a short description.

Description:

Next **Cancel**

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

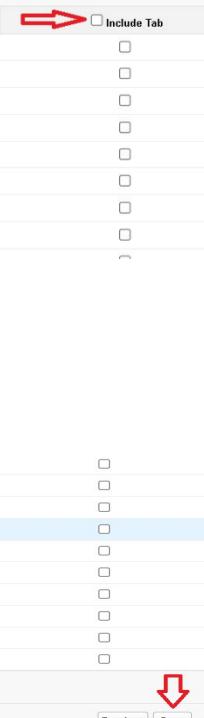
Step 3 of 3

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"/>
<input checked="" type="checkbox"/> Append tab to users' existing personal customizations	<input type="checkbox"/>

Save  **Cancel**



TASK 7:

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

TASK8:

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.

Lightning Experience App Manager

Clone Apps(Beta)

New Lightning App

App Name	Developer Name	Description	Last Modified	App Type	VL
All Tasks	Altisidel		04/12/2022, 10:13 am	Classic	
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic	
App Launcher	AppLauncher	App Launcher tabs	04/12/2022, 10:13 am	Classic	
East Solutions	Lightning<	Discover and manage business solutions designed for your industry.	04/12/2022, 10:16 am	Lightning	
Chatter Desktop	Chatter/Desktop	Chatter Desktop is an Adobe AIR-based desktop application that lets Chatter users stay connected to their social network from their desktop.	29/12/2022, 4:04 pm	Connected (Managed)	
Chatter Mobile for BlackBerry	Chatter/for BlackBerry	The Salesforce.com Chatter Mobile app lets you access Chatter data on the go. Use it to view feed items, send messages, and more.	29/12/2022, 4:05 pm	Connected (Managed)	
College Management System	Naadeem	demo app	08/12/2022, 4:16 pm	Lightning	
Community	Community	Salesforce CRM Communities	04/12/2022, 10:13 am	Classic	
Content	Content	Salesforce CRM Content	04/12/2022, 10:13 am	Classic	
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage records.	04/12/2022, 10:13 am	Lightning	

- 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.

App Details

Name your app...

Developer Name

Description

App Branding

Image

Primary Color Hex Value

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

App Launcher Preview

Next

- 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.

Available Items

Type to filter list...

- Accounts
- Activities
- Alert Settings
- All Sites
- Alternative Payment Methods
- App Launcher
- Appointment Invitations

Selected Items

No items selected

Next

- 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.

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

TASK 9:

Creation of fields for the Customer Details object

91. To create fields in an object:

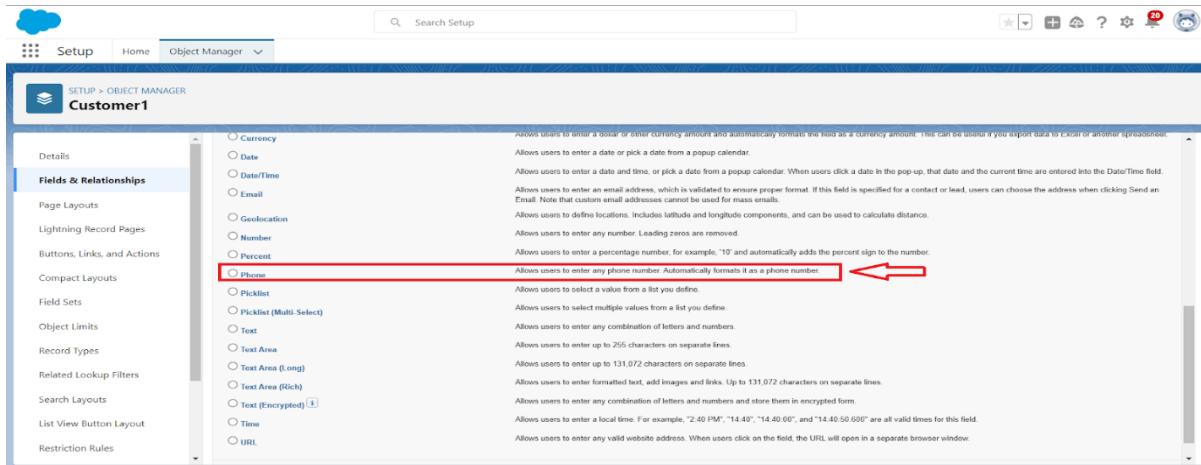
1. Go to setup >> click on Object Manager >> type object name(Customer Details) in search bar >> click on the object.

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

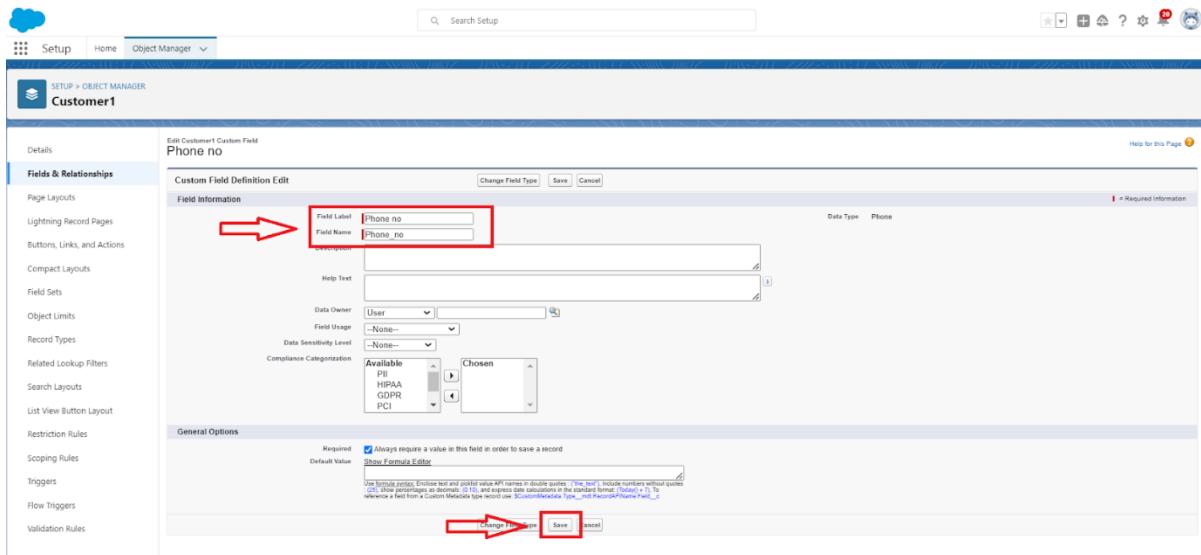
1. Now click on “Fields & Relationships” >> New

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		

1. Select Data Type as a “Phone”



1. Click on next.



5. Fill the Above as following:

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

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

9.2. 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.

TASK 10:

Creation of Lookup Fields

10.1 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', 'Object Manager', a search bar with 'Q app', and buttons for 'SchemaBuilder' and 'Create'. Below the header, a table lists objects: Appointment (Appointment__c, Custom Object), Appointment Category (AppointmentCategory, Standard Object), Appointment Invitation (AppointmentInvitation, Standard Object), and Appointment Invitee (AppointmentInvitee, Standard Object). The 'Appointment' row is highlighted with a red border.

1. 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'. The main table lists two fields: 'Appointment Date' (Appointment_Date__c, Date) and 'Appointment Name' (Name, Auto Number). A red box highlights the 'Fields & Relationships' tab in the left sidebar. A red box also highlights the 'New' button in the top right corner of the table header.

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

The screenshot shows the 'Data Type' configuration step. The 'None Selected' option is selected. Other options shown include 'Auto Number', 'Formula', 'Roll-Up Summary', 'Lookup Relationship' (which is circled in red), and 'Master-Detail Relationship'. A red arrow points to the 'Next' button at the bottom right. A note at the bottom states: 'Specify the type of information that the custom field will contain.'

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

2. Next >> Next >> Save.

Note: Make sure you complete Activity 4 Before continuing.

10.2 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	<input checked="" type="checkbox"/> Always require a value in this field in order to save a record		
What to do if the lookup record is deleted?	<input type="radio"/> Clear the value of this field. You can't choose this option if you make this field required. <input checked="" type="radio"/> Don't allow deletion of the lookup record that's part of a lookup relationship.		

1. Scroll down for Lookup Filter and click on Show filter settings.
2. Now add the filter criteria.
3. Field : Appointment: Appointment Date >> Operator : less than >> select field >> Appointment: Created Date
4. Filter type should be Required.

Lookup Filter

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

Hide Filter Settings

Filter Criteria	Insert Suggested Criteria	Clear Filter Criteria
Field: Appointment: Appointment Date	Operator: Less than	Value / Field: Appointment: Created Date
All D	Begin typing to search for a field... <input type="button" value="None"/>	<input type="button" value="Value"/> <input type="button" value="Clear"/>

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.

1. Error Message : Value does not match the criteria.
2. Enable the filter by click on Active.
3. Next >> Next >> Save.

10.3 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.

TASK 11:

Creation of Checkbox Fields

11.1 Creation of Checkbox Field on Appointment Object :

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

2. Now click on “Fields & Relationships” >> New.
3. Select “Check box” as data type and click Next.

The screenshot shows the Salesforce setup interface for the Appointment object. The 'Fields & Relationships' tab is active. In the 'Data Type' section, the 'Checkbox' option is selected and highlighted with a red box. Other options like 'None Selected', 'Auto Number', 'Formula', 'Roll Up Summary', 'Lookup Relationship', 'Master-Detail Relationship', and 'External Lookup Relationship' are also listed with their respective descriptions.

1. Give the Field Label : Maintenance service
2. Field Name : is auto populated
3. Default value : unchecked

The screenshot shows the 'Step 2. Enter the details' page for creating a new custom field. The 'Field Label' is set to 'Maintenance service'. The 'Default Value' is set to 'Unchecked' (radio button highlighted with a green arrow). The 'Field Name' is 'Maintenance_service'. There are fields for 'Description' and 'Help Text', both of which are empty. At the bottom, there are checkboxes for 'Auto add to custom report type' and 'Add this field to existing custom report types that contain this entity'.

1. Click on next >> next >> save.

11.2 Creation of Another Checkbox Field on Appointment Object :

1. Repeat the steps form 1 to 3.
2. Give the Field Label : Repairs
3. Field Nme : 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 Nme : is auto populated
9. Default value : unchecked
10. Click on next >> next >> save.

11.3 Creation of Checkbox Field on Service records Object :

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

TASK 12:

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 Nme : 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

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:

TASK 13:

Creation of Currency Fields

13.1 Creation of Currency Field on Appointment Object :

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

This screenshot shows the 'Step 2: Enter the details' screen for creating a new custom field. The field label is set to 'Service Amount'. The length is set to 18, and the decimal places are set to 0. The field name is 'Service_Amount'. There is a description and help text input area, both of which are currently empty. Under the 'Required' section, there is a checkbox for 'Always require a value in this field in order to save a record'. Below that, there is a checkbox for 'Add this field to existing custom report types that contain this entity'. The top right corner shows 'Step 2 of 4' and navigation buttons for Previous, Next, and Cancel.

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

This screenshot shows the 'Step 3: Establish field-level security' screen. It displays the field details: Field Label is 'Service Amounts', Data Type is 'Currency', and Field Name is 'Service_Amounts'. Below this, it asks to select profiles for field-level security. A table lists various profiles: Analytics Cloud Integration User, Analytics Cloud Security User, Authenticated Website, Authenticated Website, Contract Manager, and Cross Org Data Proxy User. For each profile, there are two checkboxes: 'Visible' and 'Read-Only'. The 'Read-Only' checkbox is checked for all profiles. A green arrow points to the 'Read-Only' column header. The top right corner shows 'Step 3 of 4' and navigation buttons for Previous, Next, and Cancel.

1. Click on next >> save.

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

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

4. Field Name : is auto populated

TASK 14:

14.1 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 set to 10. The 'Field Name' is set to 'Vehicle_number_plate'. The 'Description' and 'Help Text' fields are empty. Under the 'Required' section, the checkbox is checked. Under the 'Unique' section, the checkbox is checked. Under the 'External ID' section, the checkbox is unchecked. At the bottom, there are buttons for 'Previous', 'Next', and 'Cancel'.

1. Click on next >> next >> save.

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

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

TASK 15:

Creation of Picklist Fields

15.1 Creation of Picklist Fields in Service records object :

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

15.2 Creation of Picklist Fields in Billing details and feedback object :

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

TASK 16:

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 [\[?\]](#)

Formula Return Type

None Selected Select one of the data types below.

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

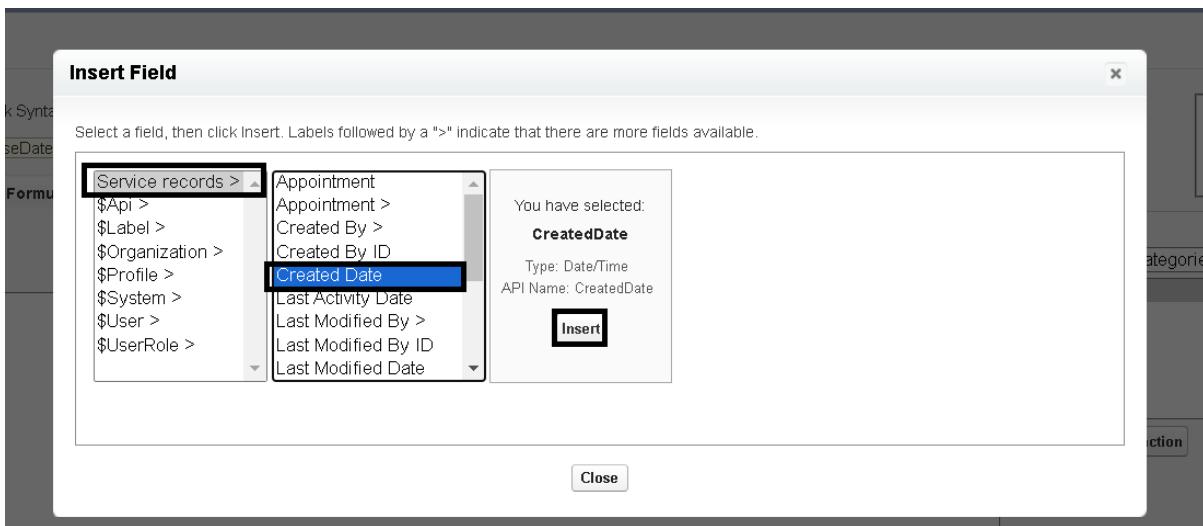
Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `Gross Margin = Amount - Cost_c`

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

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

Step 2 of 5 Previous Next Cancel ↑

1. Insert field formula should be : CreatedDate



Step 3. Enter formula

Step 3 of 5 Previous Next Cancel ↑

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

Functions ↑

`service dates (Date) =` CreatedDate ←

Quick Tips ↑

- Getting Started
- Operators & Functions

ABS
ACOS
ADDMONTHS
AND
ASCII

1. click “Check Syntax” .
2. Click next >> next >> Save.

TASK 17:

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.

The screenshot shows the Salesforce Object Manager interface for the 'Appointment' object. The left sidebar contains various tabs like 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, and Validation Rules. The 'Validation Rules' tab is highlighted with a green box. The main area displays a table titled 'Validation Rules' with one item: 'Vehicle'. The table columns are RULE NAME, ERROR LOCATION, ERROR MESSAGE, ACTIVE, and MODIFIED BY. The 'Vehicle' rule has 'Vehicle' as the rule name, 'Vehicle number plate' as the error location, 'Please enter valid number' as the error message, is active, and was modified by 'project 2' on 25/09/2023 at 11:56 am. A green box highlights the 'New' button in the top right corner of the table header.

1. Enter the Rule name as “ Vehicle ”.
2. Insert the Error Condition Formula as :-

NOT(REGEX(Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))

The screenshot shows the 'Validation Rule Edit' screen for the 'Vehicle' rule. It includes fields for Rule Name (Vehicle), Active (checked), and Description (vehicle). Below these, the 'Error Condition Formula' section is shown. The formula input field contains the expression: NOT (REGEX(Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))). A green box highlights this formula. To the right, a functions dropdown menu is open, showing options like ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, etc. A tooltip for the ABS function is visible. At the bottom left, a green box highlights the 'Check Syntax' button.

1. 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.



TASK 18:

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}"))

1. Enter the Error Message as “rating should be from 1 to 5”, select the Error location as Field and select the field as “Rating for Service”, and click Save.

TASK 19:

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. At the top, there's a navigation bar with 'Setup', 'Home', and 'Object Manager'. Below it is a search bar with 'matching' typed in. On the left, there's a sidebar with 'Data' expanded, showing 'Duplicate Management' and 'Matching Rules' (which is highlighted with a green arrow). The main area is titled 'Matching Rules' and shows a table of 'All Matching Rules'. The table has columns for 'Action', 'Role 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. At the bottom of the page, there's a navigation bar with letters from A to Z and a 'Help for this Page' link.

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

This screenshot shows the 'New Matching Rule' wizard. It's on 'Step 1: Select object'. The title is 'Matching Rule' and the sub-section is 'New Matching Rule'. The first step is 'Select the object to which this matching rule applies'. A dropdown menu labeled 'Object' has 'Customer Details' selected. A green arrow points to this dropdown. There are 'Next' and 'Cancel' buttons at the bottom right. Above the form, it says 'Step 1 of 2'.

1. Give the Rule name : Matching customer details
 2. Unique name : is auto populated
 3. Define the matching criteria as
 4. Field Matching Method
1. Gmail Exact
2. Phone Number Exact
1. Click save.
2. After Saving Click on Activate.

This screenshot shows the 'Rule Details' page. It's titled 'Rule Details' and has tabs for 'Save' and 'Cancel'. The 'Object' is set to 'Customer Details'. The 'Rule Name' is 'matching Customer data' (highlighted with a green arrow). The 'Unique Name' is 'matching_Customer_det' (highlighted with a green arrow). The 'Description' field is empty. The next section is 'Matching Criteria', which asks 'Tell the rule which fields to compare and how.' It shows a table with 'Field' (Gmail, Phone Number), 'Matching Method' (Exact), and 'Match Blank Fields' (AND). A green arrow points to the 'Field' dropdown for 'Gmail'. At the bottom, there are 'Add Filter Logic...', 'Save', and 'Cancel' buttons.

Matching Rule
matching Customer details

Matching Rule Detail

Object	Customer Details
Rule Name	matching Customer details
Unique Name	matching_Customer_details
Description	(Customer Details: Gmail EXACT MatchBlank = FALSE) AND (Customer Details: Phone_Number EXACT MatchBlank = FALSE)
Status	Inactive
Created By	project2, 25/09/2023, 10:15 am
Modified By	project2, 10/10/2023, 3:32 pm

TASK 20:

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.

Duplicate Rules

All Duplicate Rules

What Are Duplicate Rules?

View: All Duplicate Rules

Role Name	Description	Matching Rule	Active	Last Modified By	Last Modified Date
Customer Detail duplicate	Identify accounts that duplicate other accounts	Standard Account Matching Rule	<input checked="" type="checkbox"/>	t2	10/10/2023
Standard Account Duplicate Rule	Identify contacts that duplicate other contacts and leads	Standard Lead Matching Rule	<input checked="" type="checkbox"/>	t2	24/09/2023
Standard Contact Duplicate Rule	Identify leads that duplicate other leads and contacts	Standard Contact Matching Rule	<input checked="" type="checkbox"/>	t2	24/09/2023
Standard Lead Duplicate Rule		Standard Lead Matching Rule	<input checked="" type="checkbox"/>	t2	24/09/2023

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

Edit Duplicate Rule
Customer Detail duplicate

Duplicate Rule Edit

Rule Details

Rule Name	Customer Detail duplicate
Description	
Object	Customer Details
Record-Level Security	<input checked="" type="radio"/> Enforce sharing rules <input type="radio"/> Bypass sharing rules

Actions

Specify what happens when a user tries to save a duplicate record.

Action On Create	Allow <input checked="" type="checkbox"/> Alert <input type="checkbox"/> Report
Action On Edit	Allow <input type="checkbox"/> Alert <input checked="" type="checkbox"/> Report
Alert Text	Use one of these records?

TASK 21:

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.

The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'Users', the 'Profiles' link is highlighted with a red arrow. The main content area is titled 'Clone Profile'. It contains a form with fields: 'Existing Profile' dropdown set to 'Standard User' (highlighted with a red box), 'User License' dropdown set to 'Salesforce', and 'Profile Name' input field containing 'Manager' (also highlighted with a red box). At the bottom are 'Save' and 'Cancel' buttons, with 'Save' also highlighted with a red arrow.

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

The screenshot shows the 'Profile Detail' page for the 'Manager' profile. The 'Edit' button at the top of the page is highlighted with a red box. The page displays various profile details: Name (Manager), User License (Salesforce), Description, Created By (sunny_1, 13/06/2023, 2:40 pm), and Modified By (sunny_1, 13/06/2023, 2:40 pm). Below the profile details, there is a section for 'Custom App settings as default for the Garage management'.

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



1. 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.

This screenshot shows a 'Custom Object Permissions' table. The table has two main sections: 'Basic Access' and 'Data Administration'. The 'Basic Access' section includes columns for Read, Create, Edit, Delete, View All, and Modify All. The 'Data Administration' section includes columns for View All and Modify All. The rows represent different objects: Appointments, Billing details and feedback, Customer Details, Environments, Laptops, Service records, and SessionData. Checkmarks indicate the specific permissions granted for each object.

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

TASK 22:

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 and click save.

TASK 22:

Creating Manager Role

Creating Manager Role:

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

The screenshot shows the Salesforce Setup interface for Roles. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The search bar is filled with 'roles'. In the left sidebar, 'Users' is expanded, and 'Roles' is selected. The main content area displays a 'Sample Role Hierarchy' diagram. At the top of the hierarchy is 'Executive Staff' (CEO, President, CFO, VP, Sales). Below it are 'Sales' (Western Sales, Eastern Sales, International Sales), which further branch into regional and individual roles like 'CA Sales Rep', 'NY Sales Rep', 'MA Sales Rep', etc. A legend explains the hierarchy levels: *View & edit data, roll up forecasts, & all users directly* (top level), *View & edit data, roll up forecasts, & all users directly* (second level), and *View & edit data, roll up forecasts, & all users directly* (third level). A 'Set Up Roles' button is located at the bottom right of the main area.

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

The screenshot shows the 'Your Organization's Role Hierarchy' page. The tree view starts with 'Collapse All' and 'Expand All'. Under 'Nick Enterprises', the 'CEO' node is expanded, showing 'Add Role', 'Edit | Del | Assign', and a list of child roles: 'HR', 'Manager', 'On Site Emp', and 'Remote Emp'. The 'Manager' node is currently selected, and its children 'On Site Emp' and 'Remote Emp' are also listed. A red box highlights the 'Add Role' link under the 'Manager' node.

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

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

TASK 23:

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.



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

TASK 24:

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

User Edit	
<input type="button" value="Save"/> <input type="button" value="Save & New"/> <input type="button" value="Cancel"/>	
General Information	
First Name	Niklaus
Last Name	Mikaelson
Alias	nnika
Email	
Username	Mikaelson@Niklaus
Nickname	nik
Title	
Company	
Department	
Division	
User Details	
Role	Manger
User License	Salesforce
Profile	Manager
Active	<input checked="" type="checkbox"/>
Marketing User	<input type="checkbox"/>
Offline User	<input type="checkbox"/>
Knowledge User	<input type="checkbox"/>
Flow User	<input type="checkbox"/>
Service Cloud User	<input type="checkbox"/>
Site.com Contributor User	<input type="checkbox"/>
Site.com Publisher User	<input type="checkbox"/>
WDC User	<input type="checkbox"/>
Data.com User Type	<input type="button" value="--None--"/>

1. Save.

TASK 25: **creating another users**

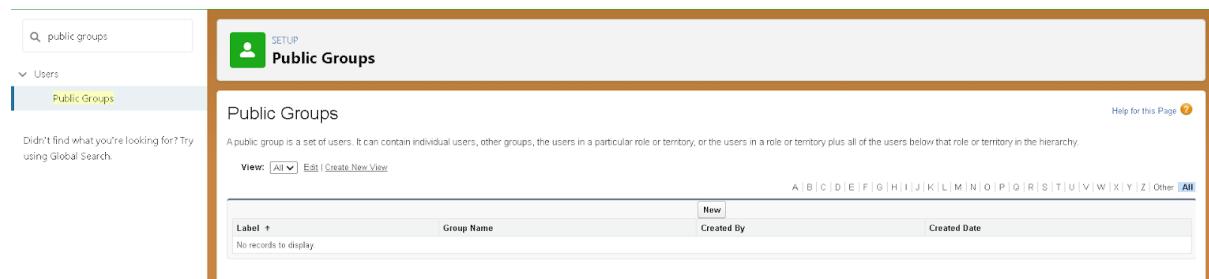
1. Repeat the steps and create another user using

- a. Role : sales person
- b. User licence : Salesforce Platform
- c. Profile : sales person

Note : create atleast 3 users with these permissions.

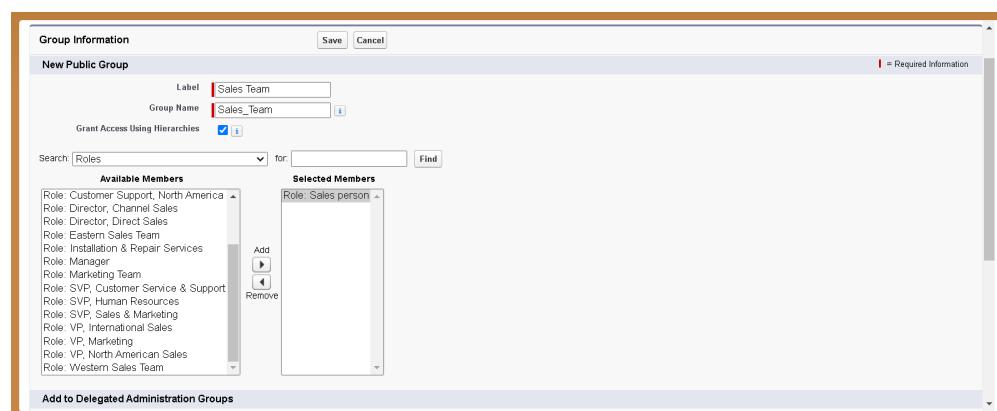
TASK 26: **Creating New Public Group**

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



The screenshot shows the 'Public Groups' page in the Salesforce setup. The top navigation bar has 'SETUP' and a user icon. Below it, there's a search bar with 'public groups' and a dropdown menu with 'Users' and 'Public Groups'. The main area is titled 'Public Groups' with a sub-instruction: 'A public group is a set of users. It can contain individual users, other groups, the users in a particular role or territory, or the users in a role or territory plus all of the users below that role or territory in the hierarchy.' There are buttons for 'View: All' and 'Edit | Create New View'. A navigation bar at the bottom includes letters from A to Z and an 'All' button. The table header includes columns for 'Label', 'Group Name', 'Created By', and 'Created Date'. A message at the bottom says 'No records to display'.

1. Give the Label as “sales team”.
2. Group name is autopopulated.
3. Search for Roles.
4. In Available Members select Sales person and click on add it will be moved to selected member.
5. Click on save.



The screenshot shows the 'New Public Group' dialog box. At the top, there are fields for 'Label' (set to 'Sales Team') and 'Group Name' (set to 'Sales_Team'). A checkbox 'Grant Access Using Hierarchies' is checked. Below these are sections for 'Available Members' and 'Selected Members'. The 'Available Members' list includes various roles like 'Customer Support, North America', 'Director, Channel Sales', etc. The 'Selected Members' list currently contains 'Sales person'. There are 'Add' and 'Remove' buttons between the two lists. At the bottom, there's a 'Save' button and a note: '|= Required Information'.

TASK 27: **Creating Sharing settings**

1. Go to setup >> type users in quick find box >> select Sharing Settings >> click Edit.
2. Change the OWD setting of the Service records Object to private as shown in fig.

Sharing Settings

Work Plan Template	Private	Private	<input checked="" type="checkbox"/>
Work Step Template	Private	Private	<input checked="" type="checkbox"/>
Work Type	Private	Private	<input checked="" type="checkbox"/>
Work Type Group	Public Read/Write	Private	<input checked="" type="checkbox"/>
Appointment	Public Read/Write	Private	<input checked="" type="checkbox"/>
Billing details and feedback	Public Read/Write	Private	<input checked="" type="checkbox"/>
Customer Details	Public Read/Write	Private	<input checked="" type="checkbox"/>
Environment	Public Read/Write	Private	<input checked="" type="checkbox"/>
Laptop	Public Read/Write	Private	<input checked="" type="checkbox"/>
Service records	Private	Private	<input checked="" type="checkbox"/>
SessionData	Public Read/Write	Private	<input checked="" type="checkbox"/>

User Visibility Settings

Other Settings

Standard Report Visibility Manual User Record Sharing Manager Groups

Minimize the number of roles created, which improves performance by cutting down processing loads Grant site users access to related cases Secure guest user record access Require permission to view record names in lookup fields

Save **Cancel**

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

Service records Sharing Rules **New** Recalculate Service records Sharing Rules Help ?

No sharing rules specified.

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

Sharing Settings

Step 1: Rule Name

Label: sharing settings
Rule Name: sharing_settings

Step 2: Select your rule type

Rule Type: Based on record owner

Step 3: Select which records to be shared

Service records: owned by members of: Roles
Sales person

Step 4: Select the users to share with

Share with: Roles
Manager

Step 5: Select the level of access for the users

Access Level: Read/Write

Save **Cancel**

TASK 28:

Create a Flow

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

1. Click on the 'Flows' link in the sidebar.

2. Click on the 'All Flows' button.

3. Click on the 'New Flow' button.

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

1. Select the 'Record-Triggered Flow' option.

2. Click on the 'Create' button.

1. Select the Object as “Billing details and feedback”in the Drop down list.
2. Select the Trigger Flow when: “A record is Created or Updated”.
3. Select the Optimize the flow for: “Actions and Related Records” and Click on Done.

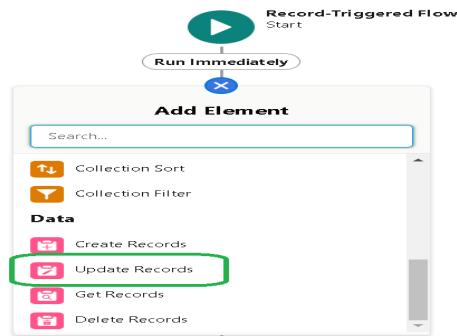
1. Select the Object as “Billing details and feedback” in the Object dropdown.

2. Under Trigger the Flow When, select “A record is created or updated”.

3. Under Optimize the Flow for, select “Actions and Related Records”.

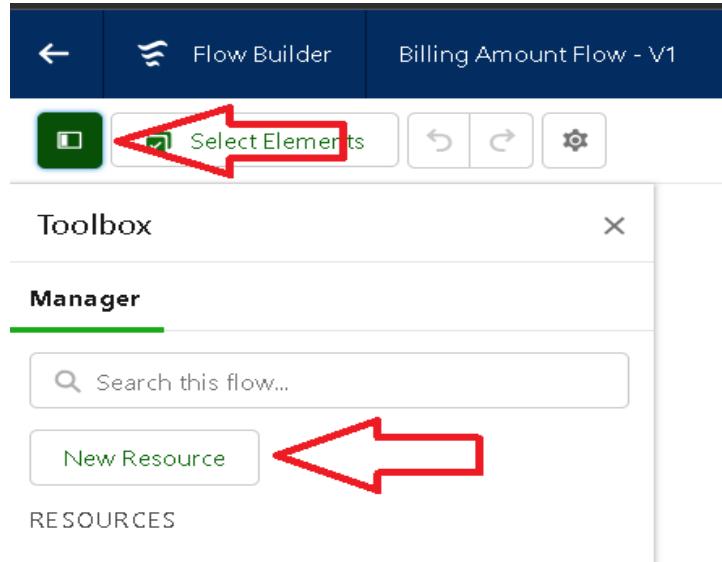
4. Click on the ‘Done’ button.

- Under the Record-triggered Flow Click on “+” Symbol and In the Drop down List select the “Update records Element”.



- Give the Label Name : Amount Update
- Api name : is auto populated
- Set a filter condition : All Conditions are met(AND)
- Field : Payment_Status__c
- Operator : Equals
- Value : Completed
- And Set Field Values for the Billing details and feedback Record
- Field : Payment_Paid__c
- Value : {!\$Record.Service_records__r.Appointment__r.Service_Amount__c}
- Click On Done.

1. Before creating another Element. Create a New Resource form Toolbox form top left.



1. Click on the New Resource, And select Variable.
2. Select the resource type as text template.
3. Enter the API name as “ alert ”.
4. Change the view as Rich Text ? View to Plain Text.
5. 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 .

1. Click done.



Now Click on Add Element , select Action.

1. Their action bar will be opened in that search for “ send email ” and click on it.
2. Give the label name as “ Email Alert ”
3. API name will be auto populated.
4. Enable the body in set input values for the selected action.
5. Select the text template that created , Body : {!alert}
6. Include recipient address list select the email form the record.
7. RecipientAddressList:
 {!\$Record.Service_records__r.Appointment__r.Customer_Name__r.Gmail__c}
8. Include subject as “ Thank You for Your Payment - Garage Management ”.
9. 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: **Email Alert** *API Name: **Email_Alert**

Description:

Set Input Values for the Selected Action

Aa Body: **{!\$Record.Service_records__r.Appointment__r.Cus}** Include **Include**

Aa Email Template ID Don't Include

@@ Log Email on Send Don't Include

Edit Action

Aa Recipient Address List: **{!\$Record.Service_records__r.Appointment__r.Cus}** Include **Include**

Aa Recipient ID Don't Include

Aa Related Record ID Don't Include

@@ Rich-Text-Formatted Body Don't Include

Aa Sender Email Address Don't Include

Aa Sender Type Don't Include

Aa Subject: **Thank You for Your Payment - Garage Management** Include **Include**

Cancel Done

1. Click on save. Give the Flow label , Flow Api name will be autopopulated.
2. And click save, and click on activate.

Record-Triggered Flow
Start

Save as

A New Version A New Flow

*Flow Label: **Billing Amount Flow**

*Flow API Name: **Billing_Amount_Flow**

Description:

Show Advanced

Cancel Save

TASK 30:

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”.

```
AmountDistribution.apxt | AmountDistributionHandler.apxc * 
Code Coverage: None | API Version: 58 | Go To
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        }
23    }
24}
25}
26}
27}
28}
29}
30}
31}

AmountDistribution.apxt | AmountDistributionHandler.apxc * 
Code Coverage: None | API Version: 58 | Go To
12
13    }
14    else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
15        app.Service_Amount__c = 8000;
16    }
17    else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
18        app.Service_Amount__c = 7000;
19    }
20    else if(app.Maintenance_service__c == true){
21        app.Service_Amount__c = 2000;
22    }
23    else if(app.Repairs__c == true){
24        app.Service_Amount__c = 3000;
25    }
26    else if(app.Replacement_Parts__c == true){
27        app.Service_Amount__c = 5000;
28    }
29}
30}
31}
```

Code:

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

        for(Appointment__c app : listApp){
            if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){
                app.Service_Amount__c = 10000;
            }
            else if(app.Maintenance_service__c == true && app.Repairs__c == true){
                app.Service_Amount__c = 5000;
            }
            else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
                app.Service_Amount__c = 8000;
            }
            else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
                app.Service_Amount__c = 7000;
            }
            else if(app.Maintenance_service__c == true){
                app.Service_Amount__c = 2000;
            }
            else if(app.Repairs__c == true){
                app.Service_Amount__c = 3000;
            }
            else if(app.Replacement_Parts__c == true){
                app.Service_Amount__c = 5000;
            }
        }
    }
}
```

```

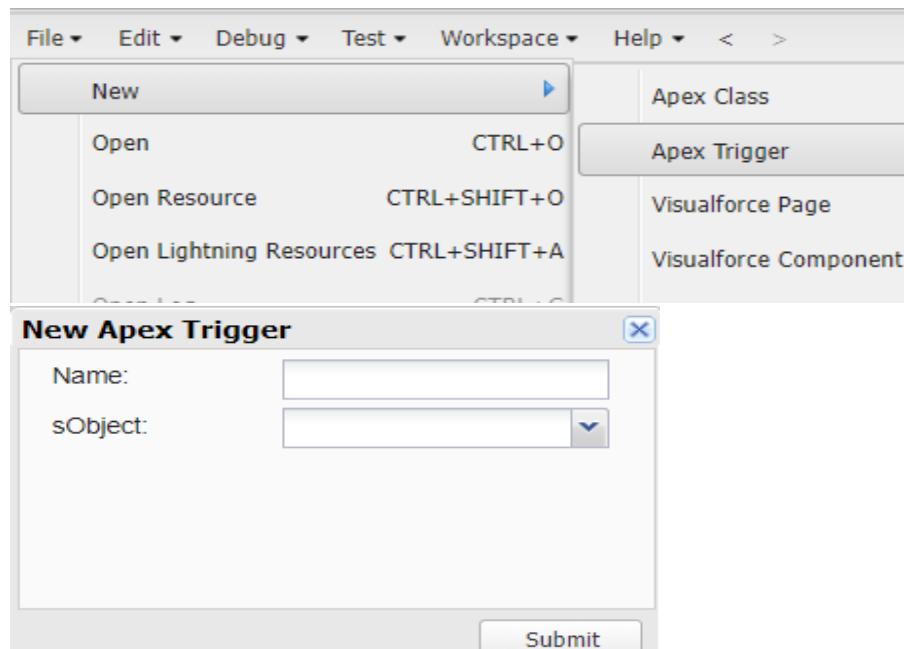
}
else if(app.Maintenance_service__c == true){
    app.Service_Amount__c = 2000;
}
else if(app.Repairs__c == true){
    app.Service_Amount__c = 3000;
}
else if(app.Replacement_Parts__c == true){
    app.Service_Amount__c = 5000;
}}
}

```

Trigger Handler :

How to create a new trigger :

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



Syntax For creating trigger :

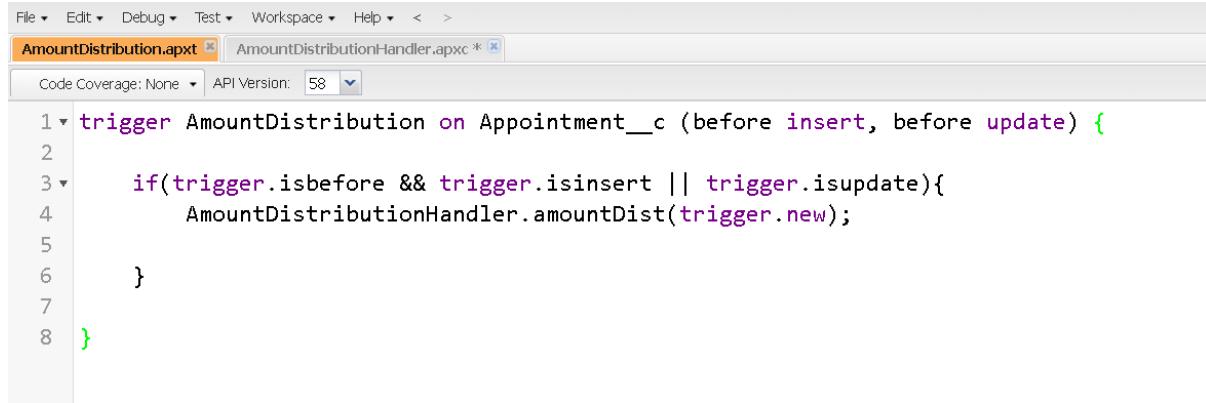
The syntax for creating trigger is :

```

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

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

1. Handler for the Appointment Object



```
File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >
AmountDistribution.apxt AmountDistributionHandler.apxc * [X]
Code Coverage: None API Version: 58
1 trigger AmountDistribution on Appointment__c (before insert, before update) {
2
3 if(trigger.isbefore && trigger.isinsert || trigger.isupdate){
4     AmountDistributionHandler.amountDist(trigger.new);
5
6 }
7
8 }
```

Code:

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

TASK 31:

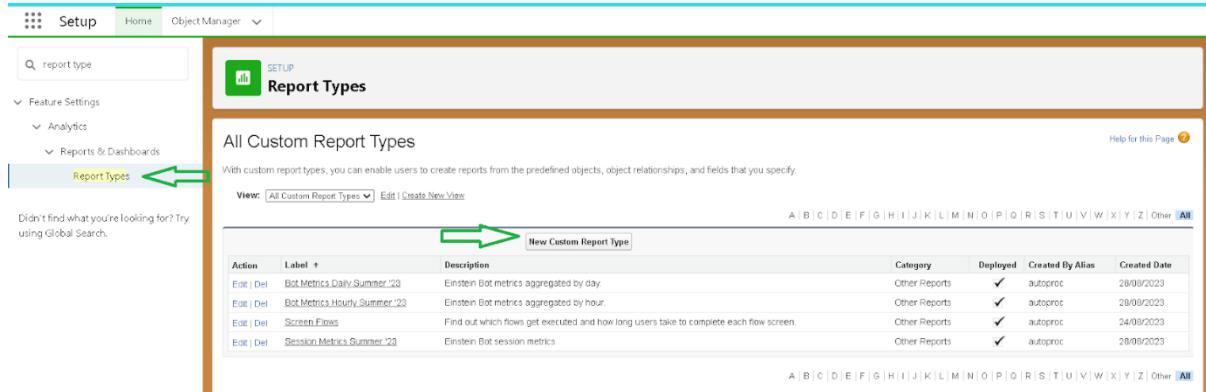
Sharing a report folder

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.

TASK 32:

Create Report Type

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



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

- Left Navigation Bar:** Shows "Setup" selected, along with "Home" and "Object Manager".
- Search Bar:** Contains the text "report type".
- Feature Settings:** Includes "Analytics" and "Reports & Dashboards".
- Report Types:** A section with a green arrow pointing to the "Report Types" link under "Reports & Dashboards".
- Report Types Page:** Titled "Report Types" with a sub-header "All Custom Report Types". It includes a search bar for "View: [All Custom Report Types]".
- Table:** Displays a list of existing report types with columns: Action, Label, Description, Category, Deployed, Created By Alias, and Created Date.
- Buttons:** "New Custom Report Type" (with a green arrow pointing to it) and "Edit | Create New View".
- Page Footer:** Includes links for "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" and "Help for this Page".

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

SETUP

Report Types

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.

Primary Object: Customer Details

Identification

Report Type Label: Service information

Report Type Name: Service_information

Description: Service information

Store in Category: Other Reports

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

Next **Cancel**

1. now , Click on Related object box.
2. 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

Relationship diagram: A (Customer Details) is connected to B (Appointment Object). A shaded overlapping area between them indicates the relationship. Below the diagram, two boxes labeled A and B show a grid of horizontal lines, representing the related records.

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)

1. Again Click to relate another object.
2. And select the related object as “ service records”.
3. Repeat the process and select the related object as “ Billing details and feedback”.
4. And click on save.

SETUP Report Types

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.

C Service records
B to C Relationship:

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

D Billing details and feedback
C to D Relationship:

- Each "C" record must have at least one related "D" record.
- "C" records may or may not have related "D" records.

Object Limit Reached
You can associate up to four objects to a custom report type.

Previous Save Cancel

TASK 33:

Create Report

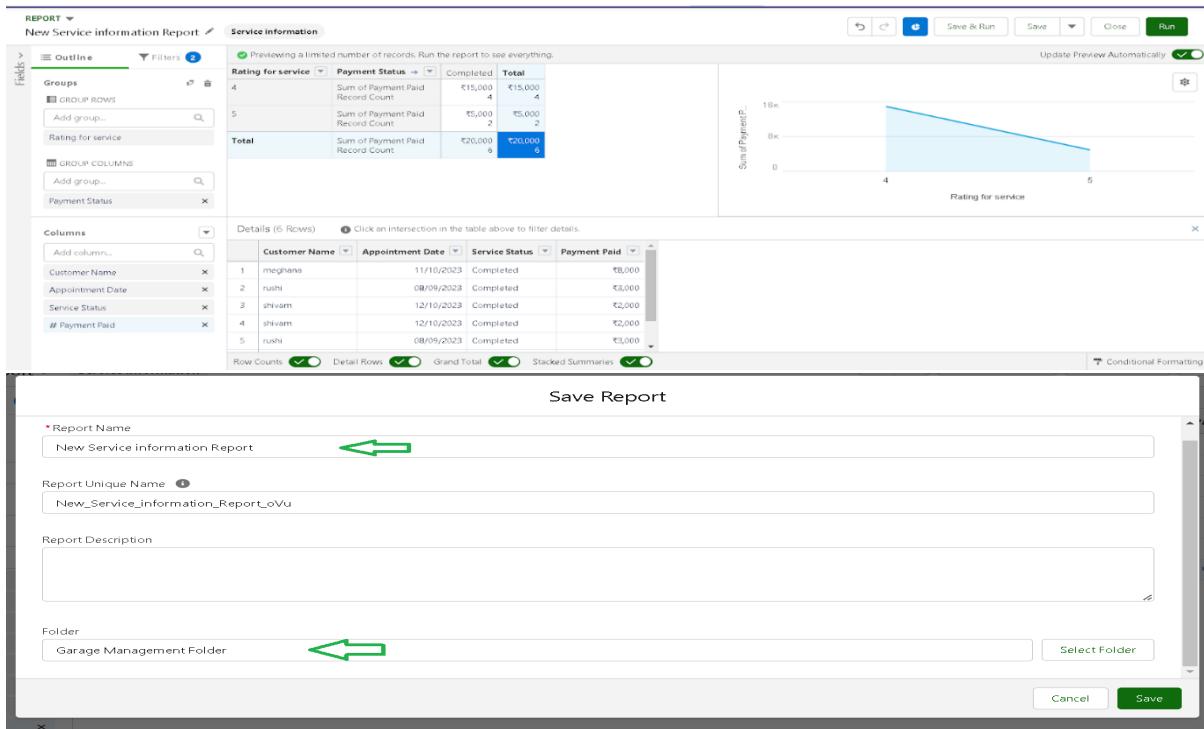
Note : Before creating report, create latest “10” records in every object.

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.

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

1. Their outline pane is opened already, select the fields that mentioned below in column section.
 - a. Customer name
 - b. Appointment Date
 - c. Service Status
 - d. Payment paid
2. Remove the unnecessary fields.
3. Select the fields that mentioned below in GROUP ROWS section.
 - a. Rating for Service
4. Select the fields that mentioned below in GROUP ROWS section.
 - a. Payment Status
5. Click on Add Chart , Select the Line Chart.
1. Click on save, Give the report Name : New Service information Report
2. Report unique Name is auto populated.
3. Select the folder the created and Click on save.



TASK 34:

Create Dashboard Folder

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

The figure shows a 'Create folder' dialog box with fields for 'Folder Label' and 'Folder Unique Name'.

Fields:

- * Folder Label:** Service Rating
- * Folder Unique Name:** ServiceRating

Buttons: Cancel, Save

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

TASK 35:

Create Dashboard

1. Go to the app >> click on the Dashboards tabs.

- Give a Name and select the folder that created, and click on create.

New Dashboard

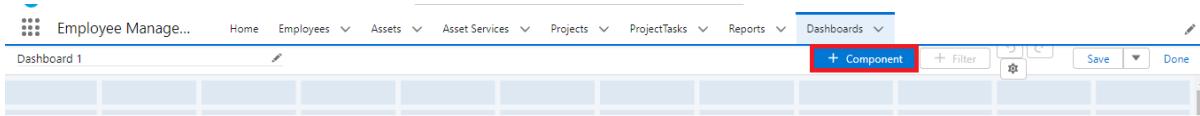
* Name
Customer review

Description

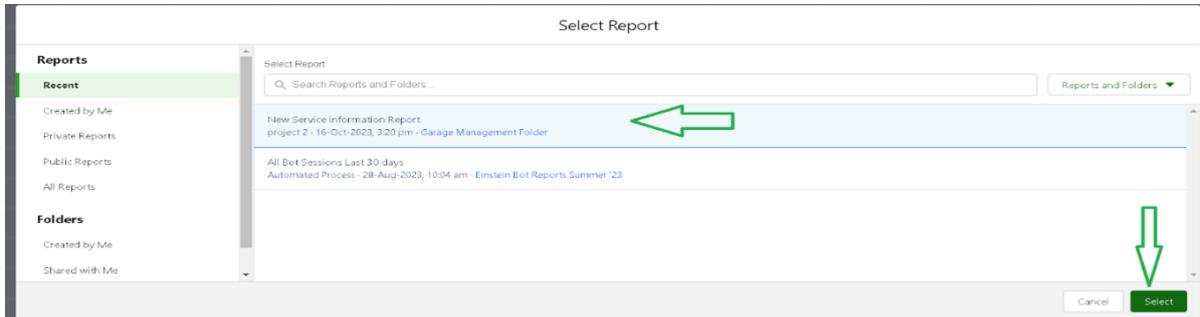
Folder
Service Rating Select Folder

Cancel Create

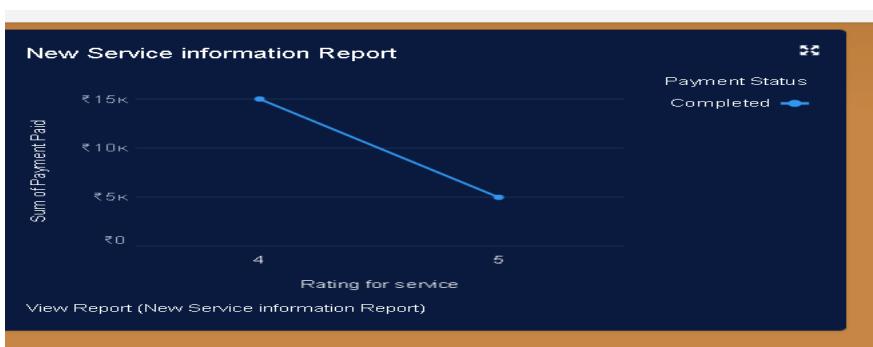
- Select add component.



- Select a Report and click on select.

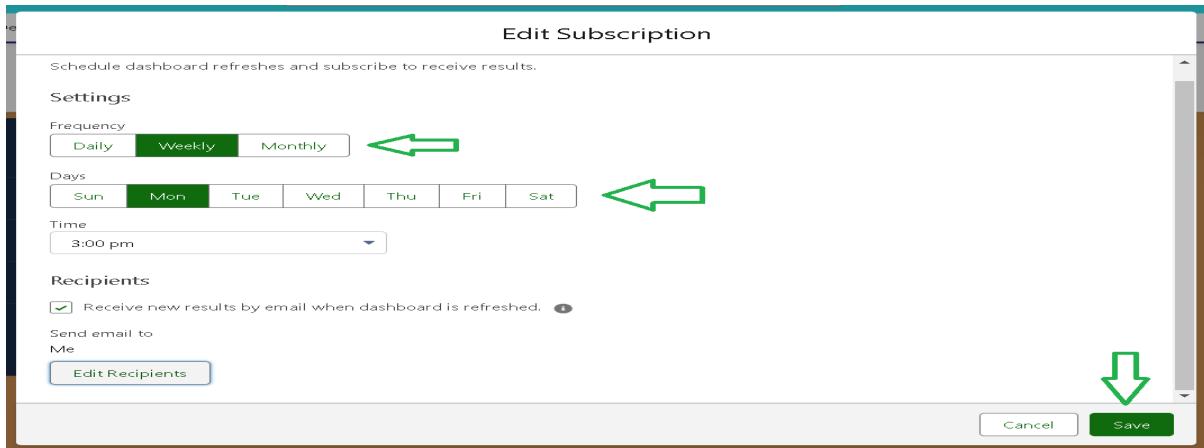


- Select the Line Chart. Change the theme.
- Click Add then click on Save and then click on Done.
- Preview is shown below.



- After that Click on Subscribe on top right.

2. Set the Frequency as “ weekly ”.
3. Set a day as monday.
4. And Click on save.



TASK 36: 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.

The screenshot shows the 'New Customer Detail' form. At the top, it says 'New Customer Detail' and has a note: '*= Required Information'. The 'Information' section contains three required fields: 'Customer Name' (Mac), 'Phone number' (5678765567), and 'Gmail' (mac@gmail.com). To the right, it shows the 'Owner' as 'Annapurna SmartBridge'. At the bottom, there are 'Cancel', 'Save & New', and 'Save' buttons, with arrows pointing to the 'Customer Name' field and the 'Save & New' button.

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.

- Click on save to see the Service Amount.

Now, Create a service Record

- Click on the “Service record tab”.
- Enter the Appointment, and started is selected as default.
- Click on save.

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

Conclusion

By leveraging the Salesforce platform, the project successfully established a streamlined and transparent system for garage management. The salesforce-based garage management system simplifies and streamlines the operations of a running and auto repair shop. By automating tasks such as appointment scheduling, inventory tracking, billing and customer communication, the system enhances efficiency and improves the overall user experience for both staff and customers.