

GARAGE MANAGEMENT SYSTEM

Introduction:

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

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?".

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

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

<https://youtu.be/r9EX3lGde5k>

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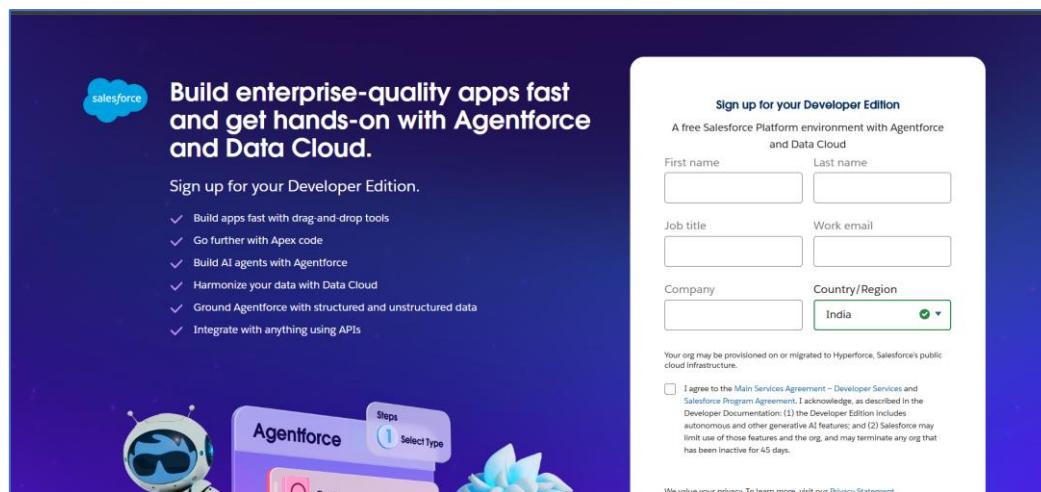
MILESTONE -1

Salesforce

ACTIVITY – 1: - Creating Developer Account:

Creating a developer org in salesforce.

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



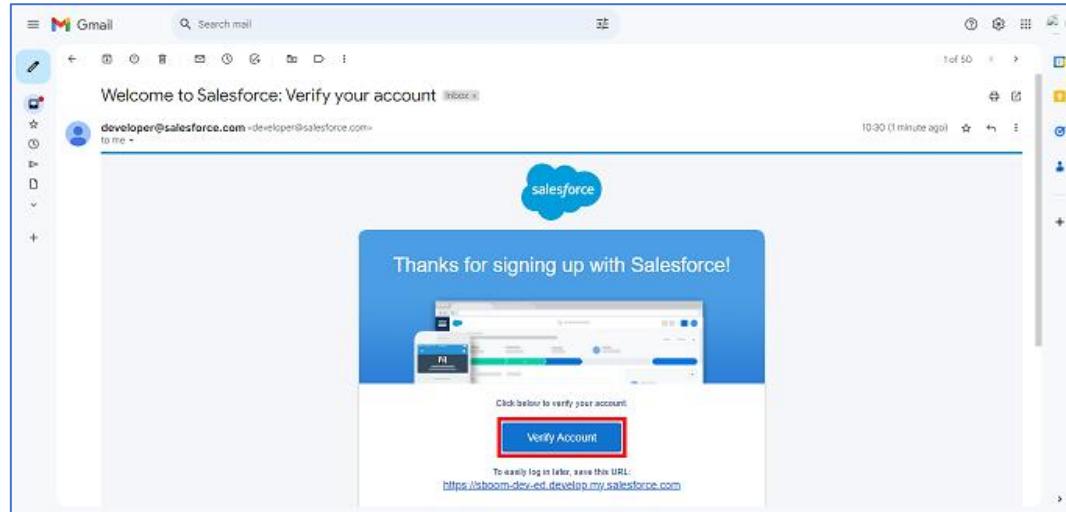
- **FIRST NAME:** Ganesh Kumar
- **LAST NAME:** Pamala
- **JOB TITLE:** Developer
- **WORK EMAIL:** ganeshpamala586@gmail.com
- **COMPANY:** Gayatri Degree College Tirupati
- **COUNTRY/ REGION:** India

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Activity 2: Account Activation:

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.

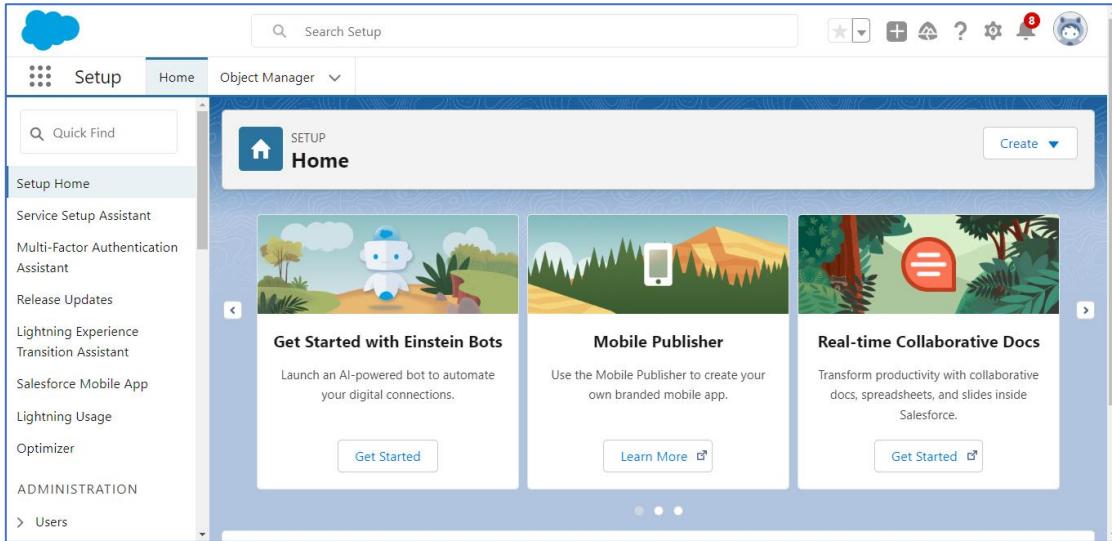


2. Click on Verify Account
3. Give a password and answer a security question and click on change password.

A screenshot of the Salesforce "Change Your Password" page. It shows fields for "New Password" and "Confirm New Password", both of which are highlighted with a red border. Below these are "Security Question" and "Answer" fields. A large blue "Change Password" button at the bottom is also highlighted with a red border.

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



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MILESTONE – 2

OBJECT

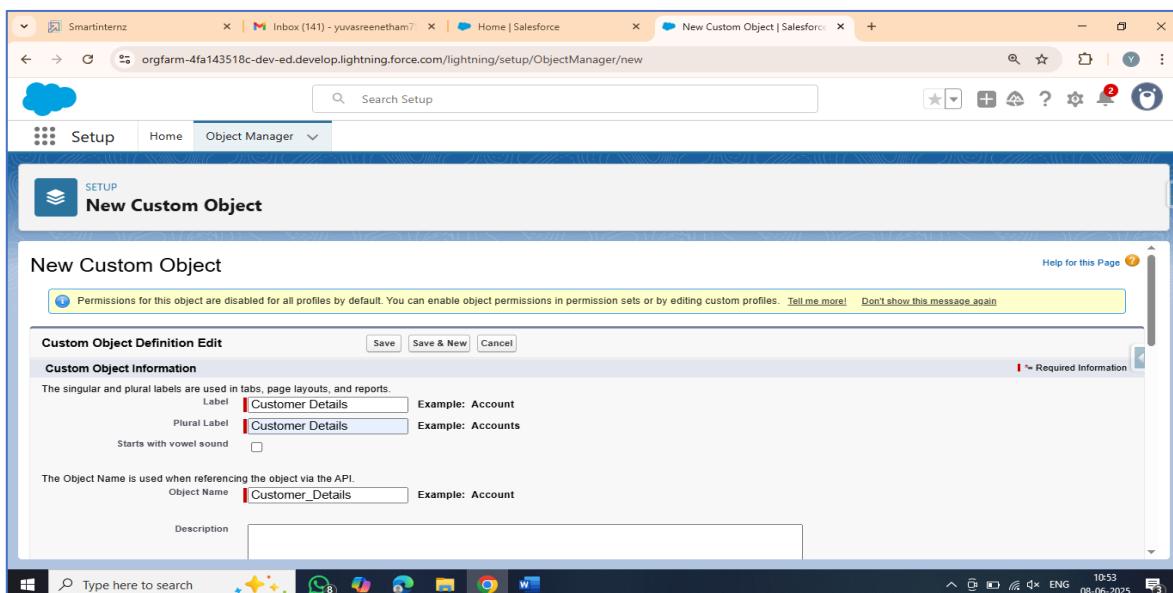
ACTIVITY – 1: Create Customer Details Object

To create an object:

- From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

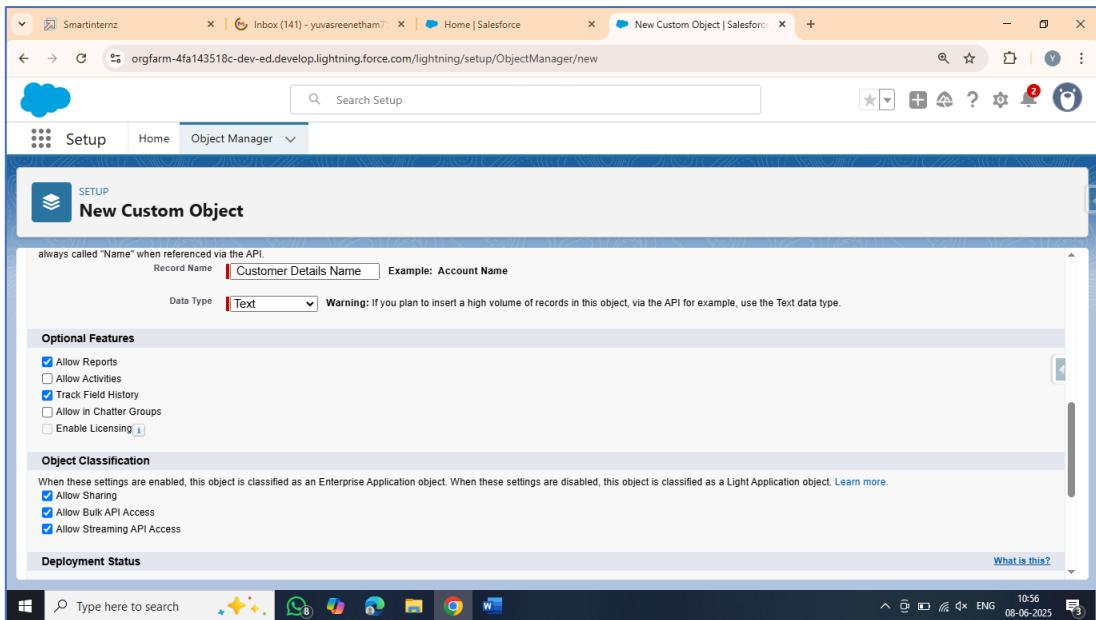


- Enter the label name >> Customer Details
- Plural label name >> Customer Details

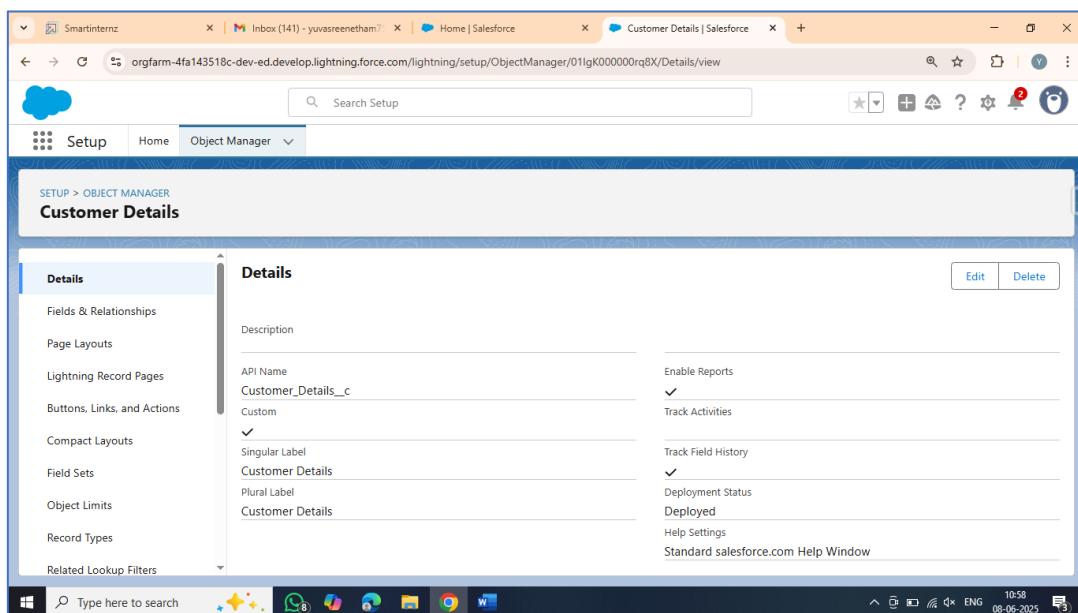


- Enter Record Name Label and Format
 - Record Name >> Customer Name
 - Data Type >> Text
- Click on Allow reports and Track Field History.

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7. Allow search >> Save.



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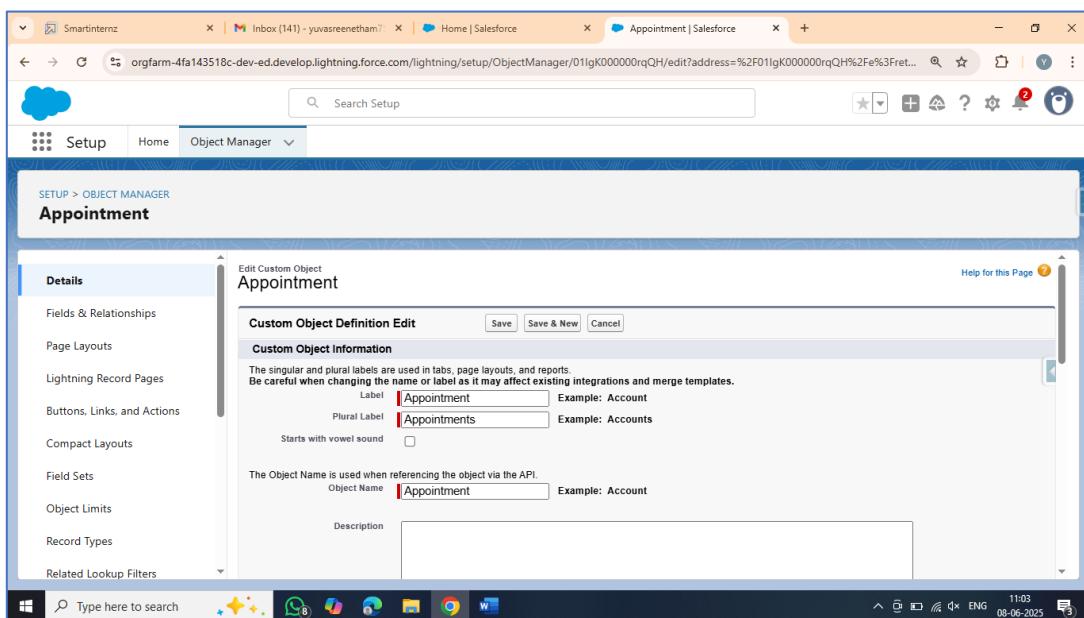
ACTIVITY – 2 : Create Appointment Object

To create an object:

- From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

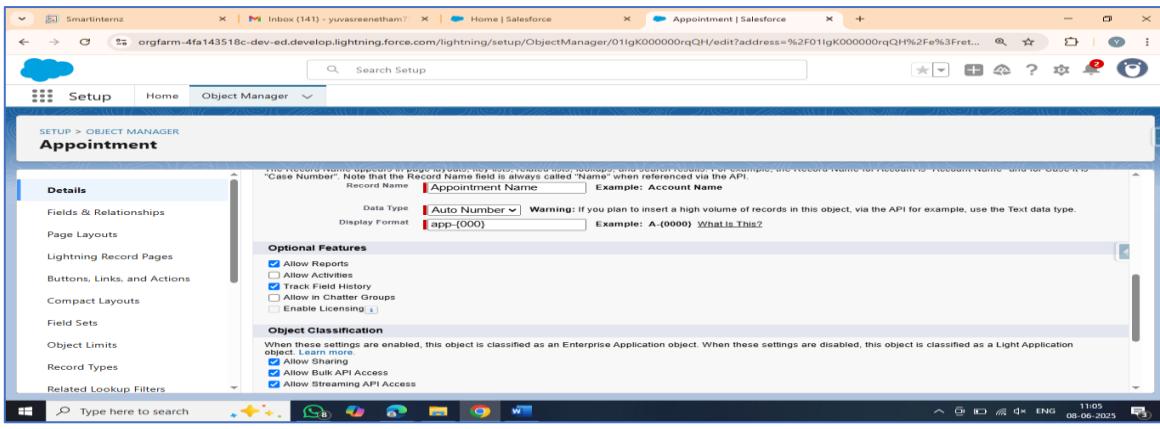


- Enter the label name >> Appointment
- Plural label name >> Appointments

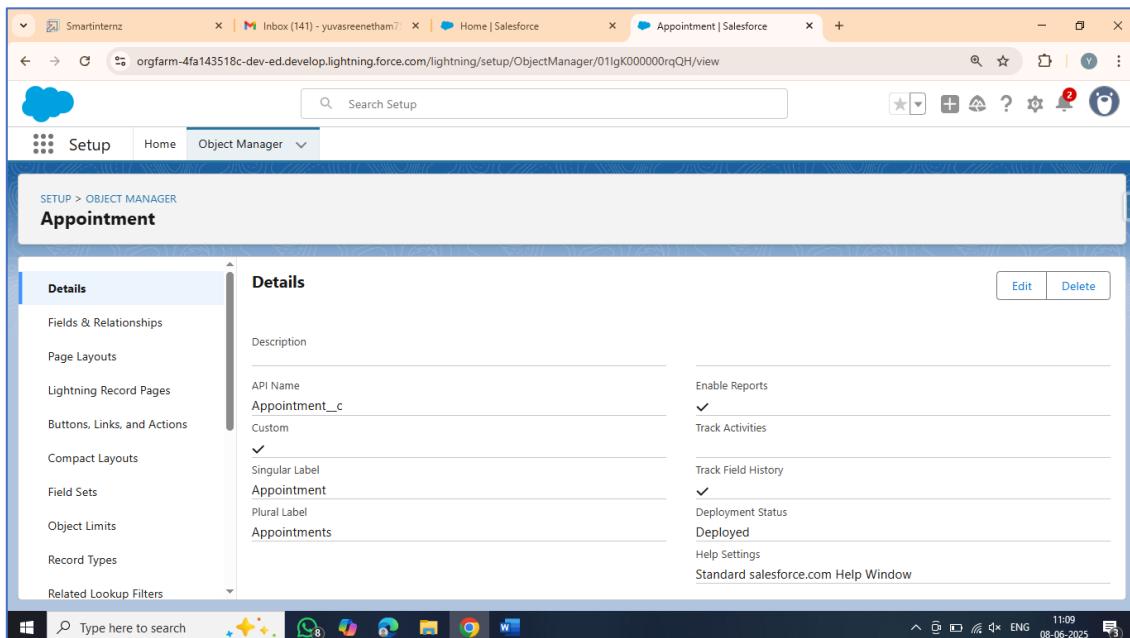
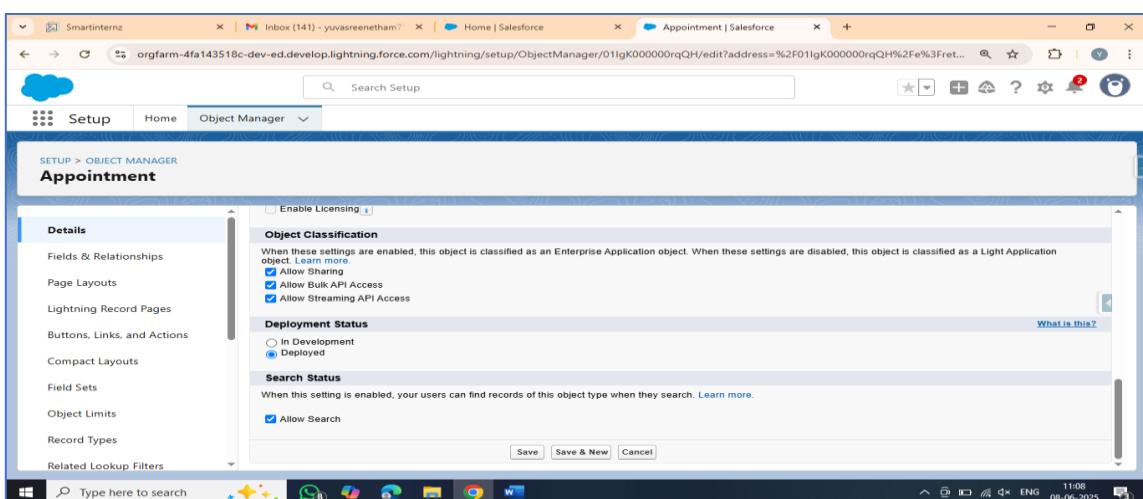


- Enter Record Name Label and Format
 - Record Name >> Appointment Name
 - Data Type >> Auto Number
 - Display Format >> app- {000}
 - Starting number >> 1
- Click on Allow reports and Track Field History.

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4. Allow search >> Save.



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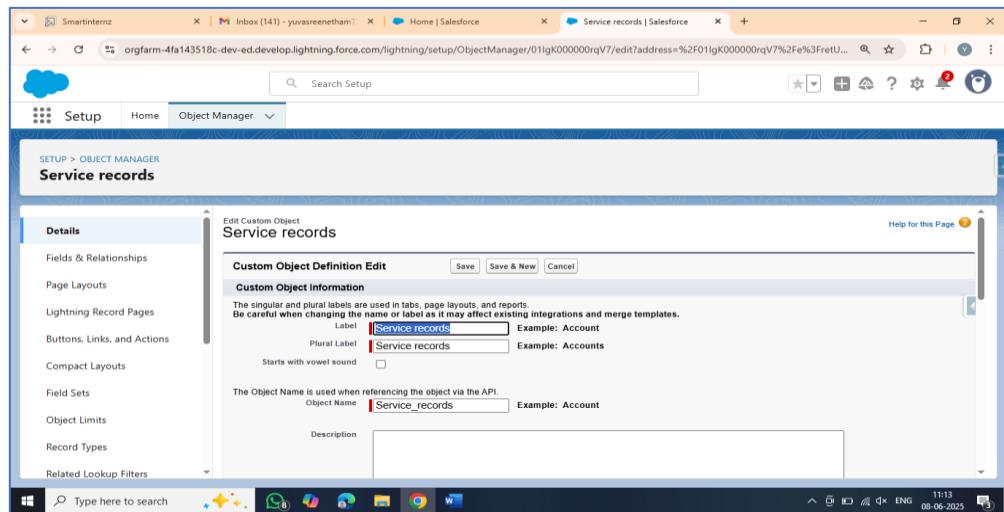
ACTIVITY -3 :- Create Service records Object

To create an object:

- From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

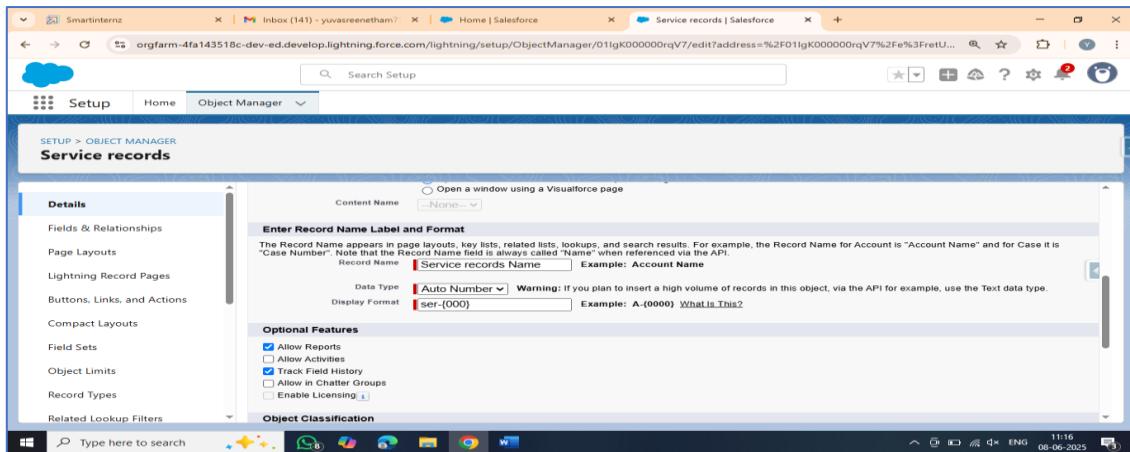


- Enter the label name >> Service records
- Plural label name >> Service records

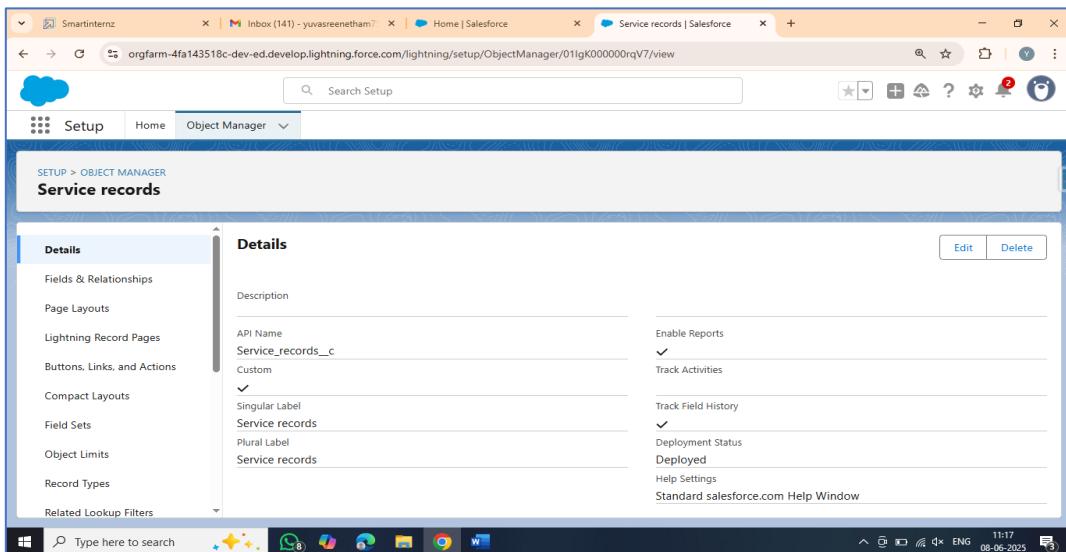
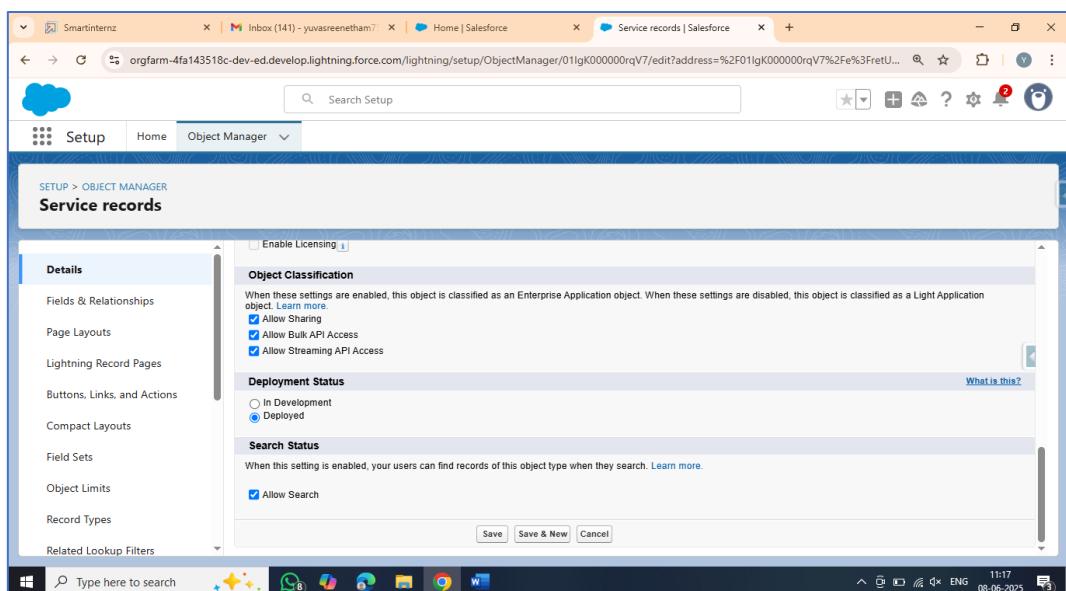


- Enter Record Name Label and Format
 - Record Name >> Service records Name
 - Data Type >> Auto Number
 - Display Format >> ser- {000}
 - Starting number >> 1
- Click on Allow reports and Track Field History,

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6. Allow search >> Save.



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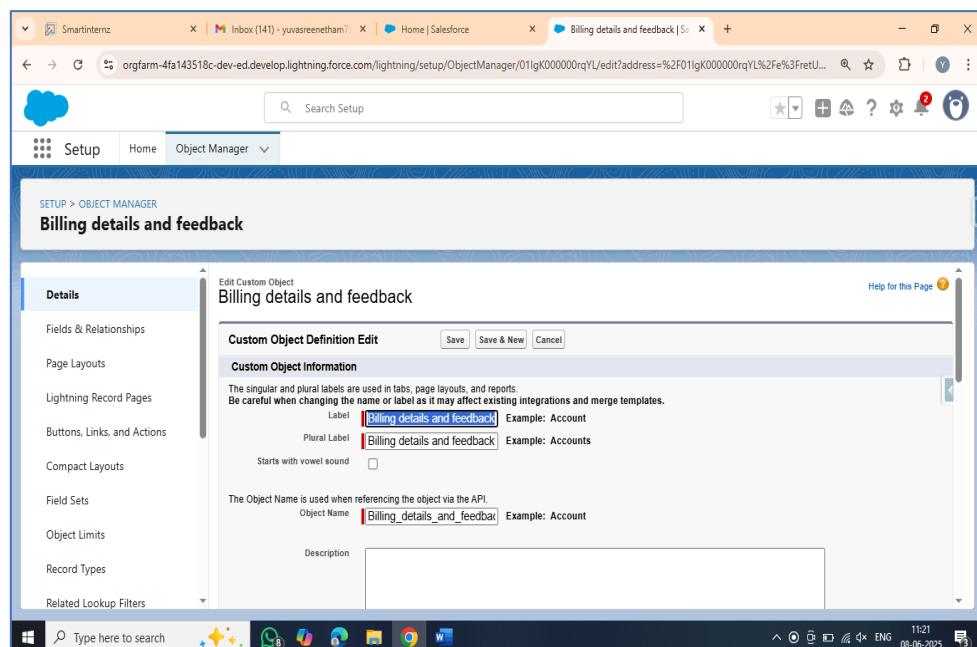
ACTIVITY – 4: Create Billing details and feedback Object

To create an object:

- From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

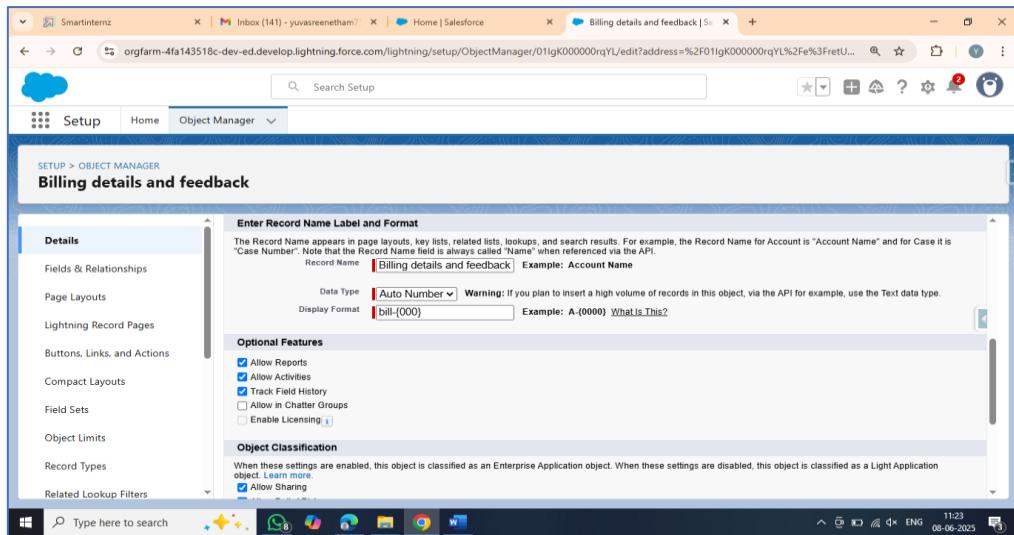


- Enter the label name >> Billing details and feedback
- Plural label name >> Billing details and feedback
- Enter Record Name Label and Format

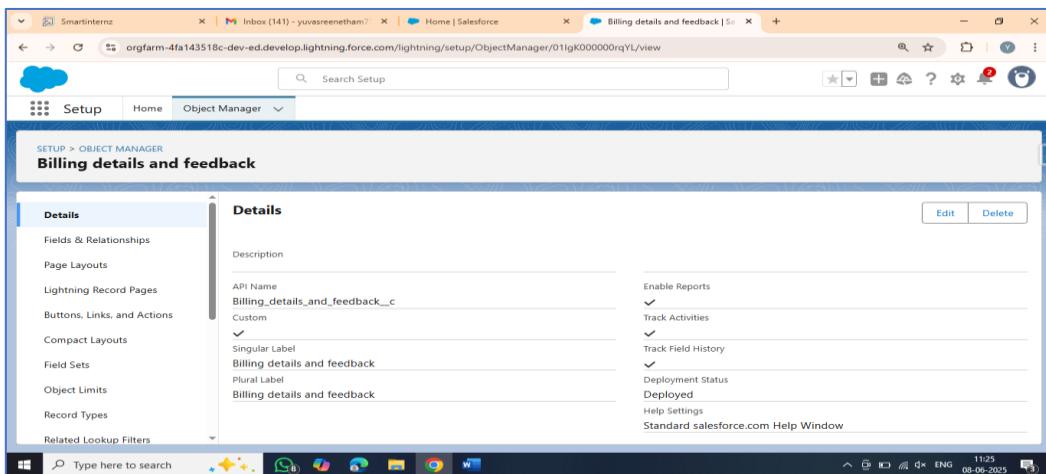
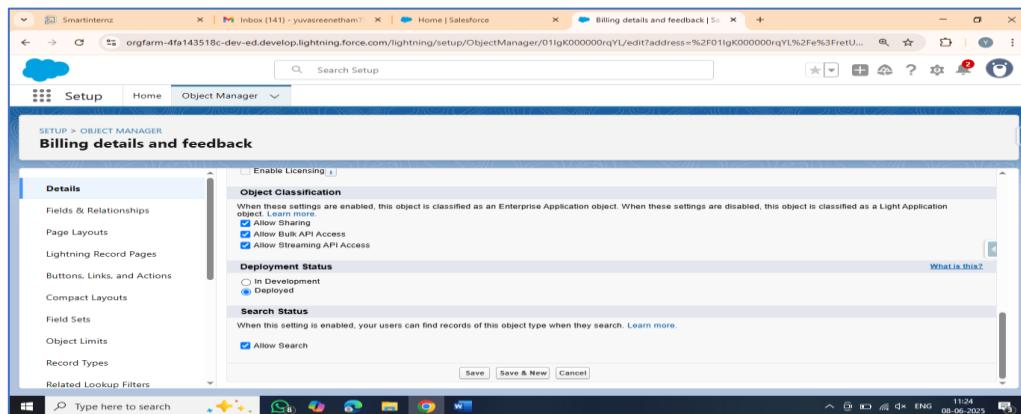


- Record Name >> Billing details and feedback Name
 - Data Type >> Auto Number
 - Display Format >> bill- {000}
 - Starting number >> 1
- Click on Allow reports and Track Field History,

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5. Allow search >> Save.



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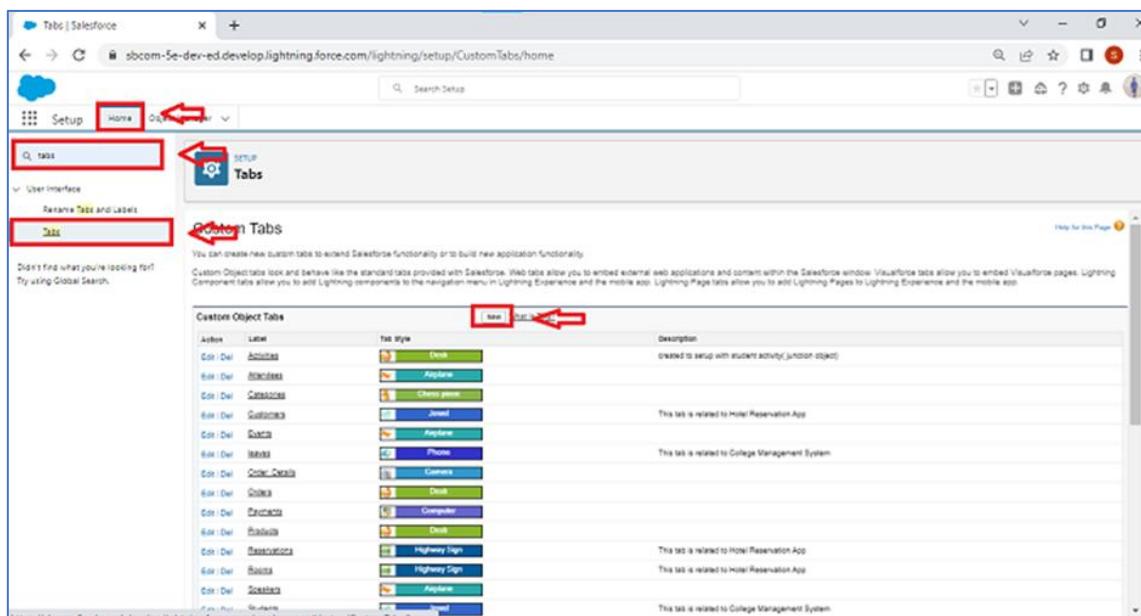
MILESTONE -3

TABS

ACTIVITY -1 :- Creating a Custom Tab

To create a Tab:(Customer Details)

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



- 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

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

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Step 3. Add to Custom Apps

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"/>
Bolt Solutions (standard__LightningBolt)	<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"/>

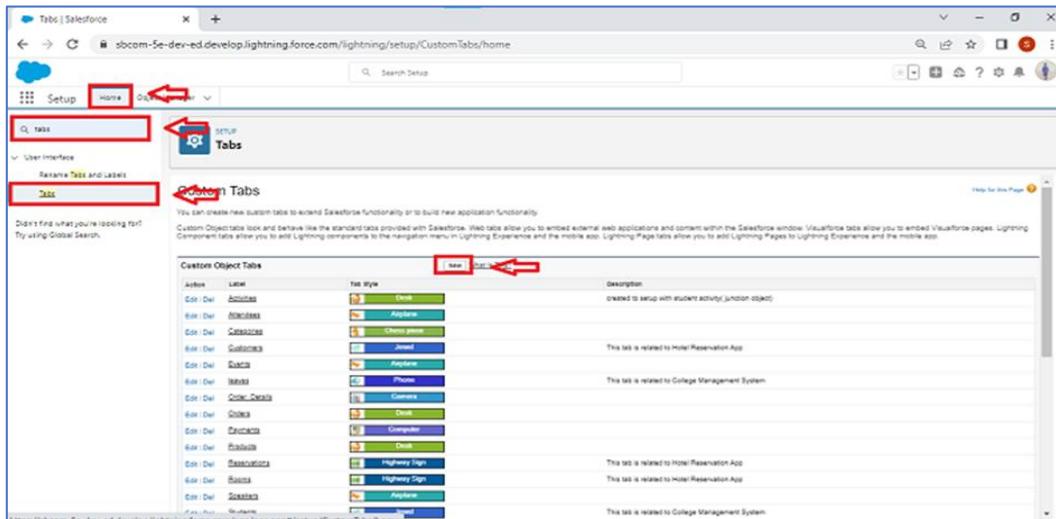
↓ [Previous](#) [Save](#) [Cancel](#)

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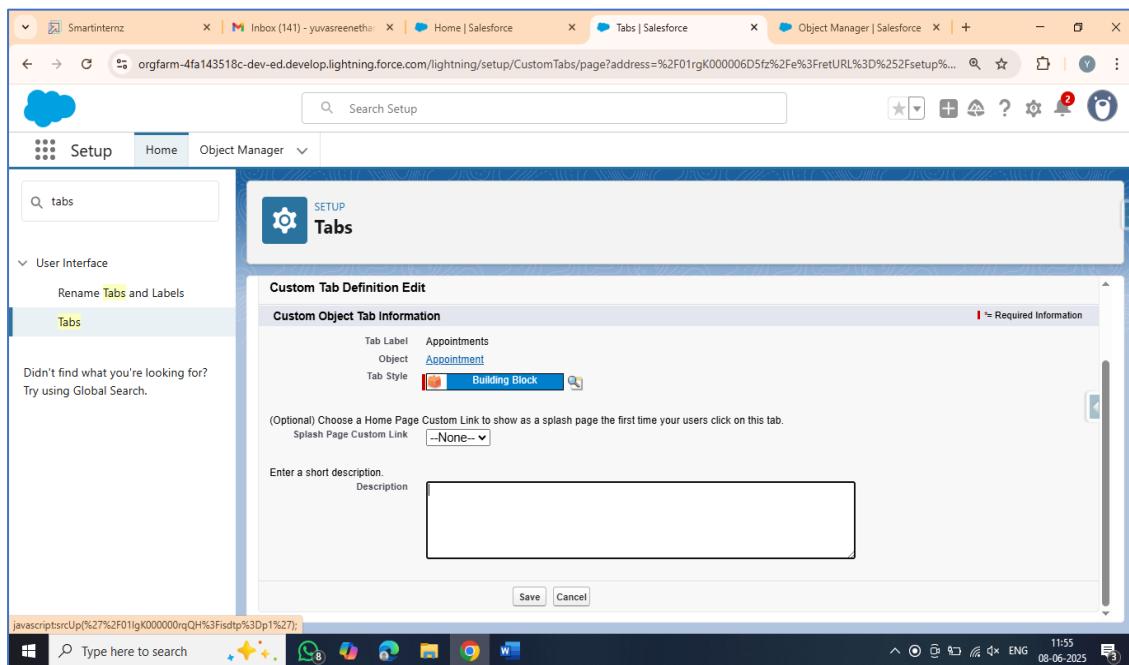
ACTIVITY – 2: Creating Remaining Tabs

To create a Tab:(Appointments)

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



- Select Object(appointments) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab.



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

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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"/>
Bolt Solutions (standard__LightningBolt)	<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"/>

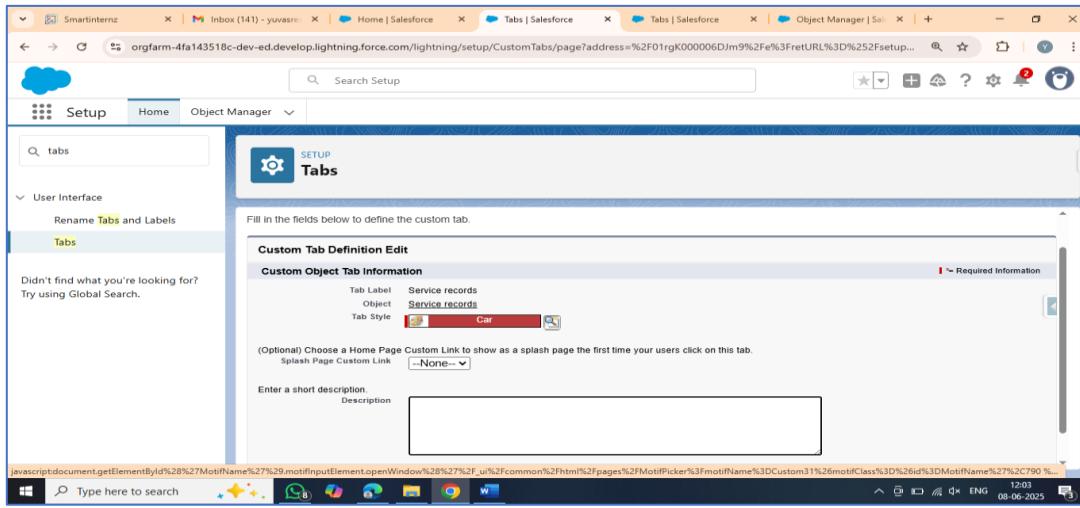
[Previous](#) [Save](#) [Cancel](#)

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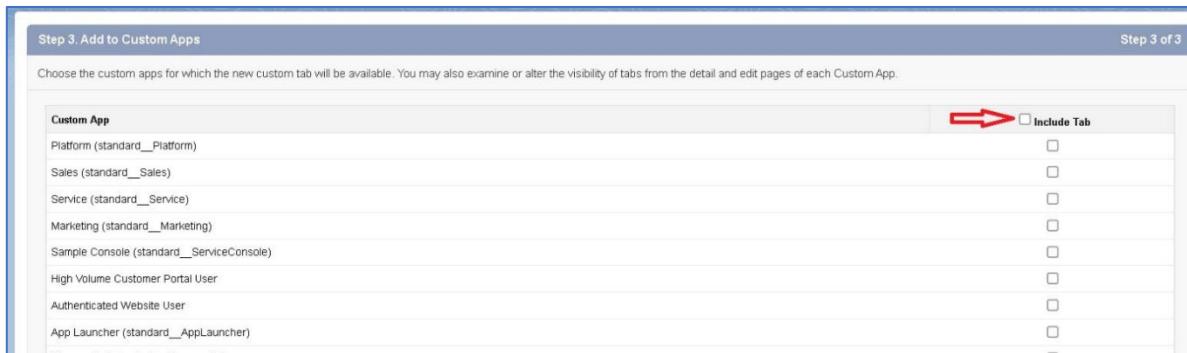
ACTIVITY -3 :- SERVICE RECORDS

To create a Tab:(Service records)

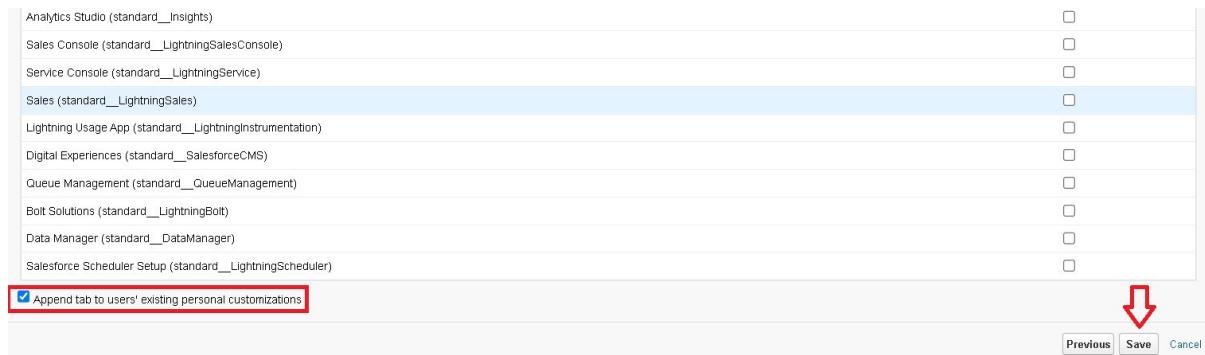
- Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
- Select Object (Service records) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab.



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



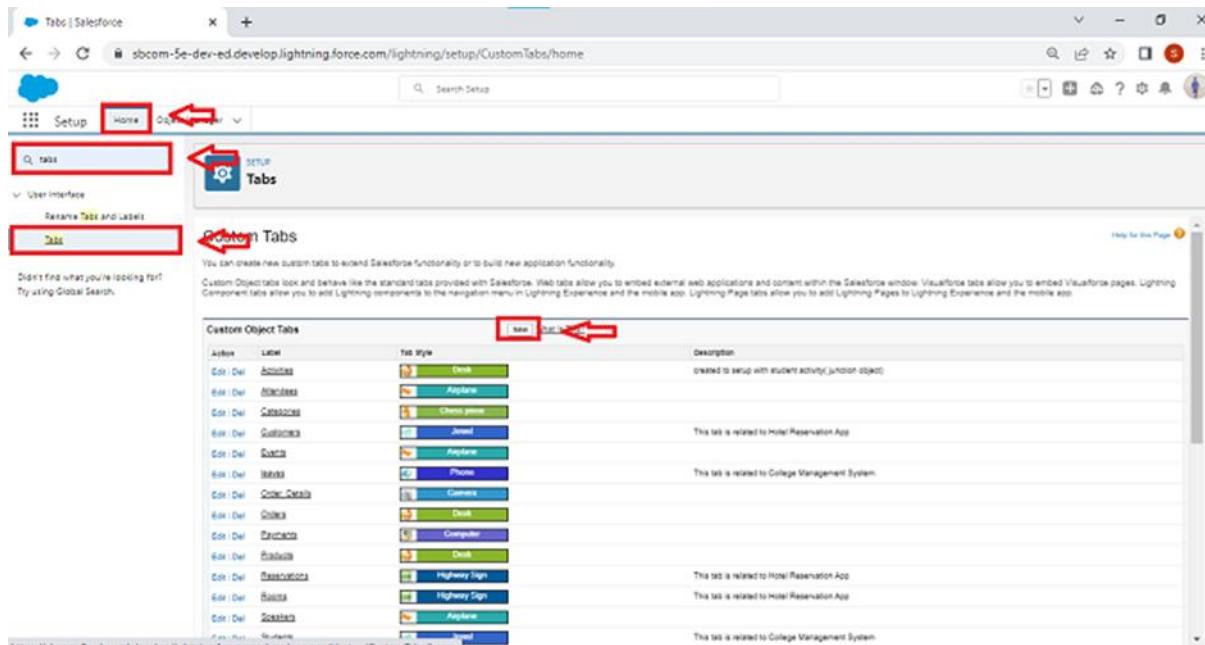
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ACTIVITY – 4:- BILLING DETAILS AND FEEDBACK

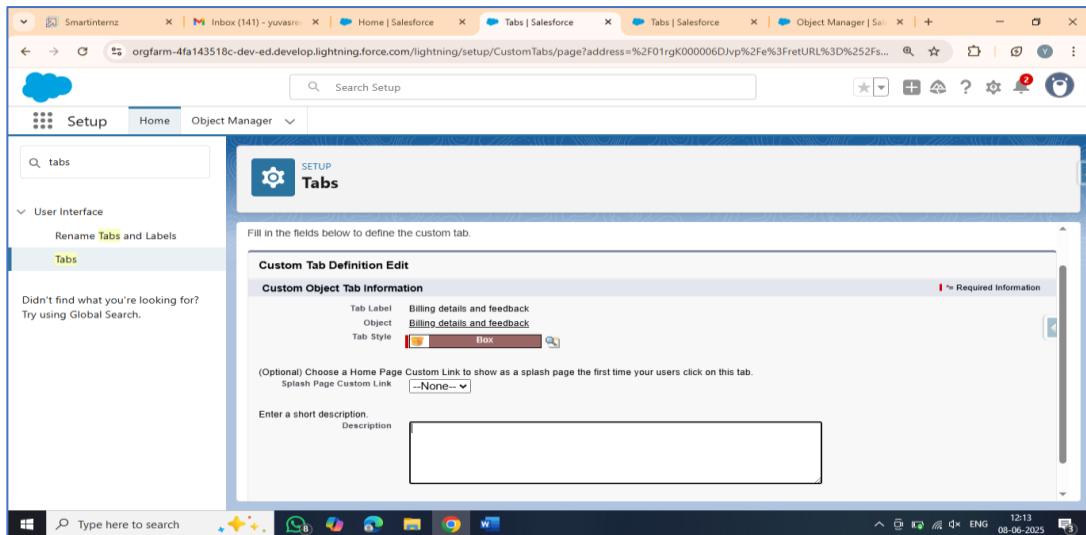
To create a Tab:(Billing details feedback)

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



- Select Object (Billing details feedback) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab.

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

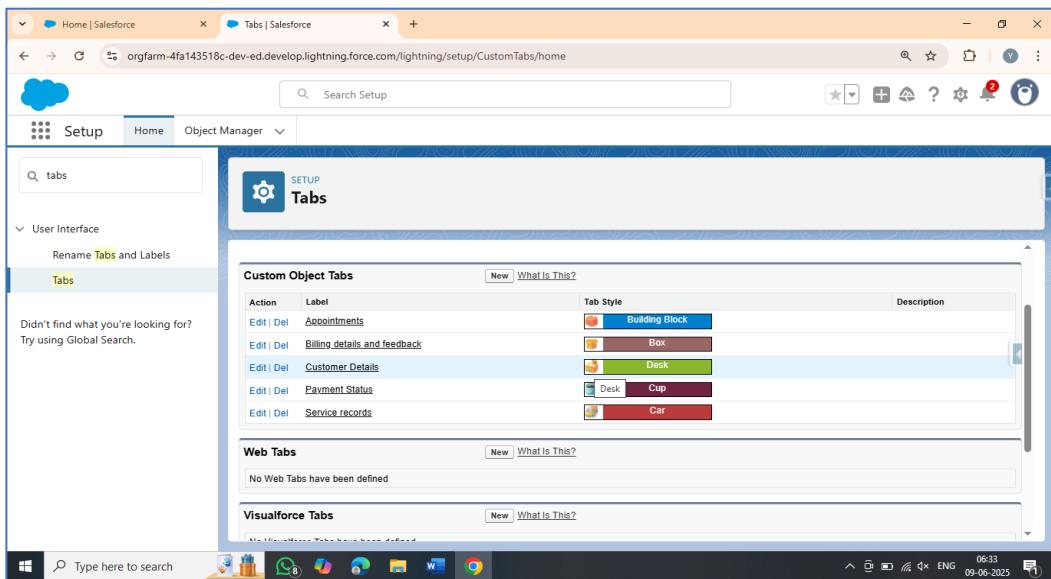
Step 3. Add to Custom Apps

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"/>

Custom App	<input type="checkbox"/> Include Tab
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 checked="" type="checkbox"/>
Lightning Usage App (standard_LightningInstrumentation)	<input type="checkbox"/>
Digital Experiences (standard_SalesforceCMS)	<input type="checkbox"/>
Queue Management (standard_QueueManagement)	<input type="checkbox"/>
Bolt Solutions (standard_LightningBolt)	<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="button" value="Save"/>

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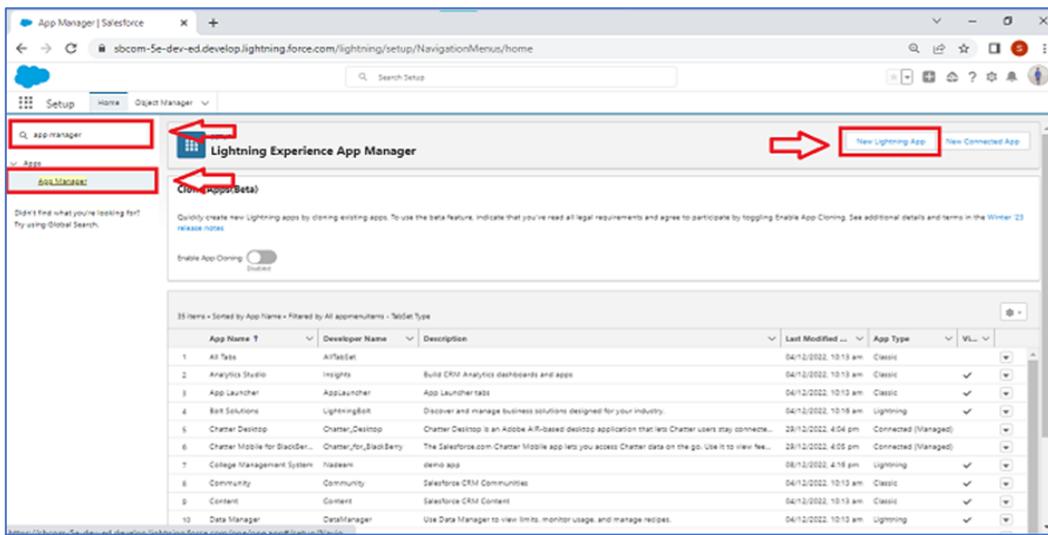
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MILESTONE – 4 THE LIGHTNING APP

ACTIVITY – 1:- Create a Lightning App

➤ To create a lightning app page:

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



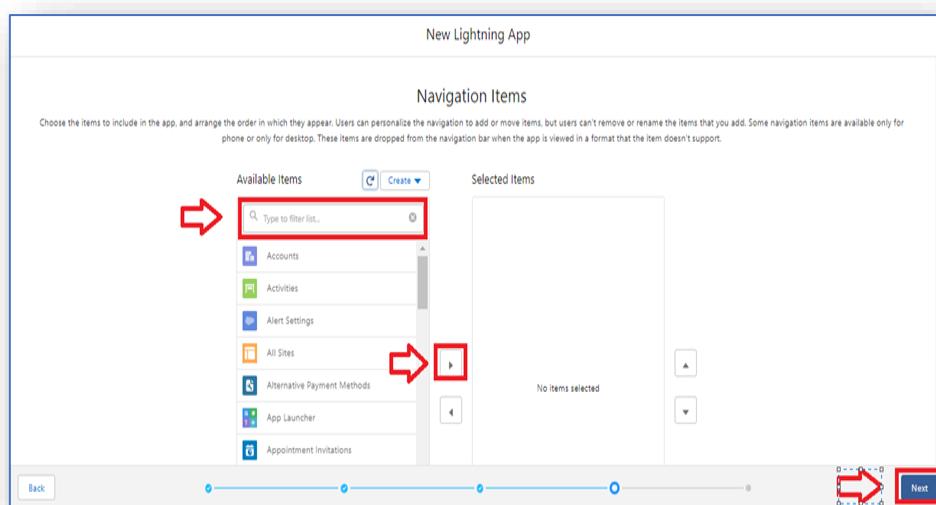
- Fill the app name in app details as Garage Management Application >> Next >> (App option page) keep it as default >> Next >> (Utility Items) keep it as default >> Next.

The screenshot shows the "New Lightning App" configuration page. It has two main sections: "App Details" and "App Branding". In the "App Details" section, there's a field labeled "App Name" with the placeholder "Name your app...". A red arrow points to this field. Below it are fields for "Developer Name" and "Description". In the "App Branding" section, there's a "Primary Color Hex Value" field set to "#007002", a "Upload" button for an image, and a checkbox for "Org Theme Options". At the bottom, there's a "Next" button with a red arrow pointing to it.

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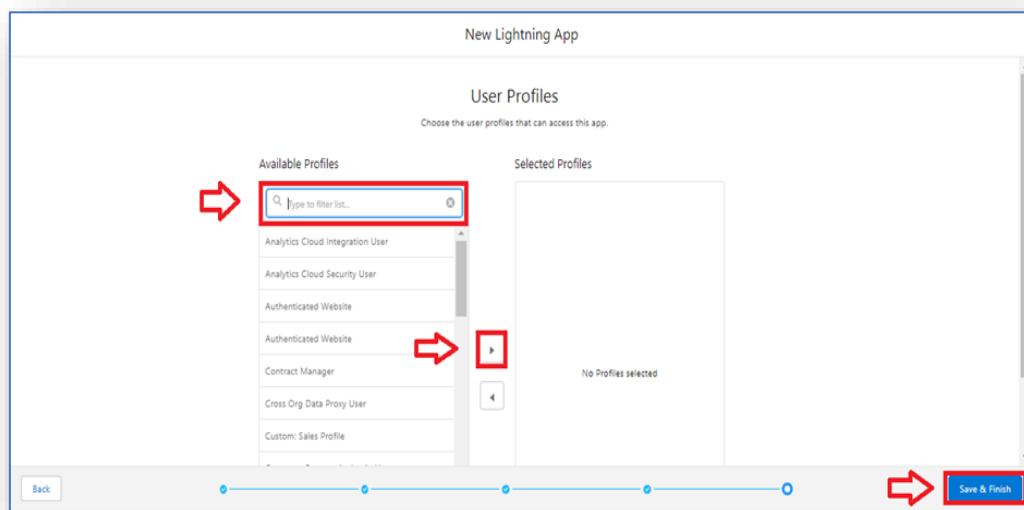
To Add Navigation Items:

- 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



➤ To Add User Profiles:

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



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MILESTONE – 5

FIELDS

ACTIVITY -1 : Creation of fields for the Customer Details object

1. To create fields in an object:

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

The screenshot shows the Salesforce Object Manager interface. At the top, there's a search bar with 'cus' typed into it, a 'SchemaBuilder' button, and a 'Create' button. Below the header, a table lists objects. The 'Customer' object is listed under 'Standard Object'. The 'Customer Details' object is listed under 'Custom Object'. Both rows have red boxes around them. The 'Customer Details' row also has a blue border around the entire row.

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

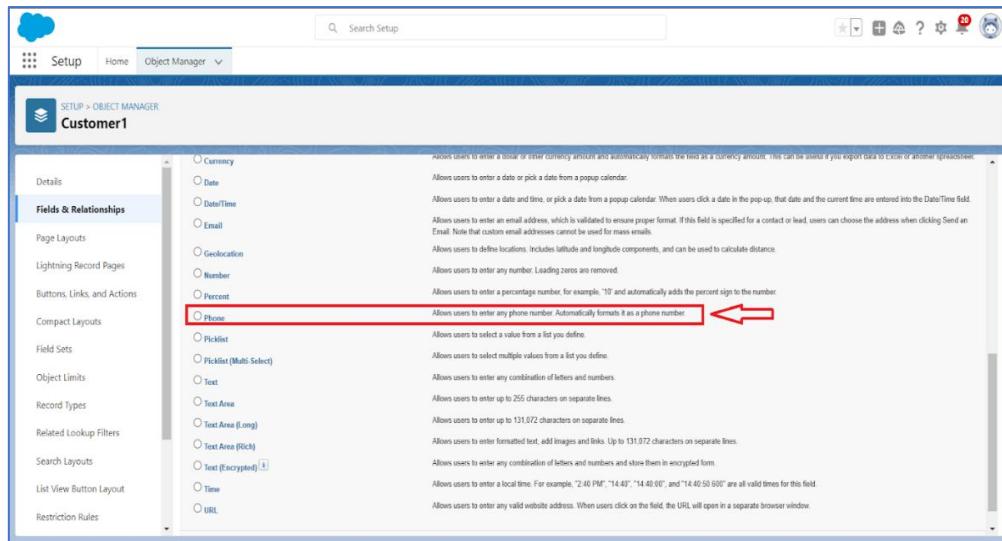
- Now click on "Fields & Relationships" >> New

The screenshot shows the 'Fields & Relationships' section of the Customer object's setup. On the left, there's a sidebar with links like 'Details', 'Fields & Relationships' (which is selected and highlighted with a red box), 'Page Layouts', etc. The main area shows a table of existing fields. A red arrow points to the 'Customer1' object label at the top of the list. Another red box highlights the 'Fields & Relationships' link in the sidebar. A third red box highlights the 'New' button in the top right corner of the table header.

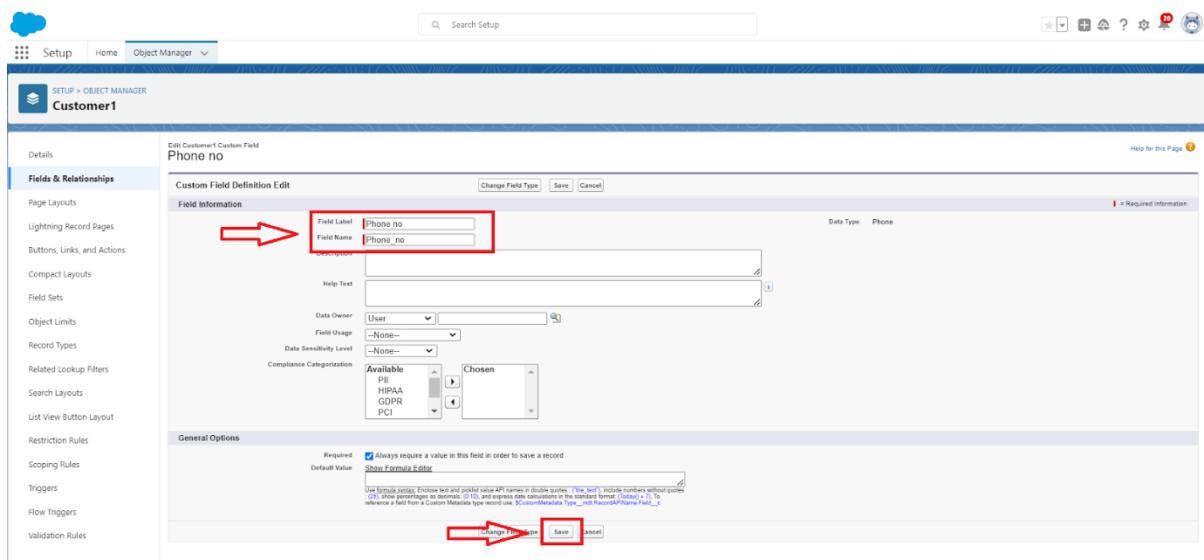
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
current Status	current_Status__c	Picklist		
Customer Name	Name	Text(80)	✓	
Email id	Email_id__c	Email (Unique)	✓	
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓	
Permanent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

- Select Data Type as a "Phone"

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- Click on next.
- Fill the Above as following:
 - Field Label: Phone number
 - Field Name : gets auto generated
 - Click on Next > Next > Save and new.



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2. To create other fields in an object:

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

The screenshot shows the Salesforce Object Manager interface. A search bar at the top contains the text "cus". Below it, a table lists two objects: "Customer" and "Customer Details". The "Customer Details" row is highlighted with a red border. The columns in the table are: Label, API Name, Type, Description, Last Modified, and Deployed.

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

- Now click on "Fields & Relationships" >> New

The screenshot shows the "Fields & Relationships" section for the "Customer" object. On the left, a sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Field Sets. The main area displays a table of existing fields with columns: FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. A red arrow points to the "New" button at the top right of the table area.

FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	Lookup(User)		
current_Status	Picklist		
Customer Name	Text(80)		✓
Email Id	Email (Unique)		✓
Last Modified By	Lookup(User)		
Owner	Lookup(User,Group)		✓
Permanent Address	Text Area(55)		
Phone no	Phone		

- Select Data Type as a "Email"

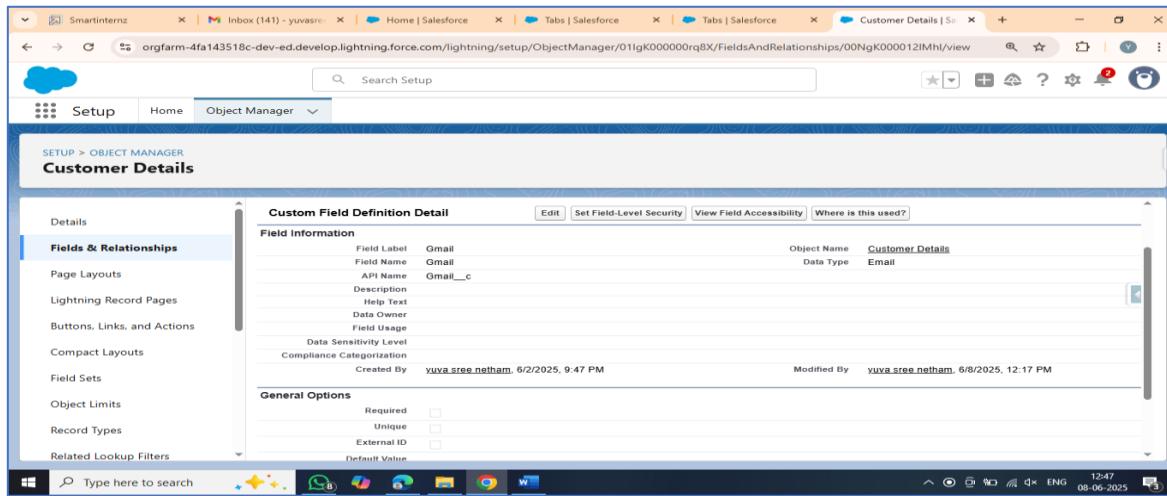
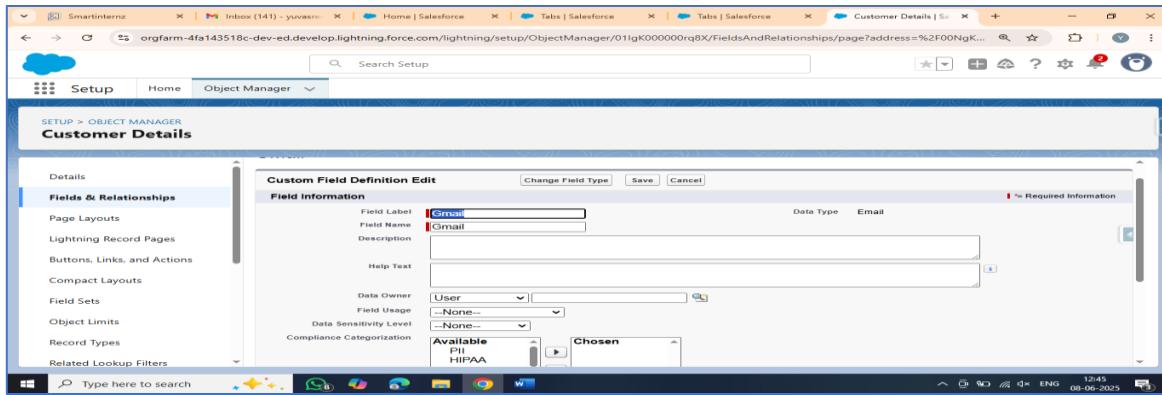
The screenshot shows the "Fields & Relationships" section for the "Customer Details" object. The "Details" tab is selected in the sidebar. A modal dialog is open, listing various data types with their descriptions. The "Email" option is selected and highlighted with a red border. A red arrow points to the "Next Step" button at the bottom right of the dialog.

DATA TYPE	DESCRIPTION
Currency	Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
Date	Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Date/Time	Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
Email	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
Geolocation	Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
Number	Allows users to enter any number. Leading zeros are removed.
Percent	Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
Picklist	Allows users to select a value from a list you define.
Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
Text	Allows users to enter any combination of letters and numbers.
Text Area	Allows users to enter up to 255 characters on separate lines.
Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.

- Click Next
- Fill the Above as following:
- Field Label: Gmail

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



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ACTIVITY – 2:- Creation of Lookup Fields

Creation of Lookup Field on Appointment Object:

- 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 'Object Manager' tab is selected. A search bar at the top right contains the text 'app'. Below the search bar, there is a 'Schema Builder' button and a 'Create' dropdown menu. The main table lists four objects: Appointment, Appointment Category, Appointment Invitation, and Appointment Invitee. The 'Appointment' row is highlighted with a red border. The columns in the table are labeled: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Appointment	Appointment__c	Custom Object		24/08/2023	✓
Appointment Category	AppointmentCategory	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			

- Now click on "Fields & Relationships" >> New

The screenshot shows the 'Fields & Relationships' section for the Appointment object. The 'Fields & Relationships' tab is selected. A 'New' button is highlighted with a red box. The table lists two fields: 'Appointment Date' and 'Appointment Name'. The columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment Date	Appointment_Date__c	Date		
Appointment Name	Name	Auto Number		✓

- Select "Look-up relationship" as data type and click Next.

The screenshot shows the 'Data Type' configuration screen. The 'None Selected' option is selected. A note says 'Select one of the data types below.' Below are five options: 'Auto Number', 'Formula', 'Roll-Up Summary', 'Lookup Relationship' (which is circled in red), and 'Master-Detail Relationship'. A note for 'Lookup Relationship' says: '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.' Another note for 'Master-Detail Relationship' says: 'Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where: • The relationship field is required on all detail records. • The recordowner field is not determined by the master record.'

- Select the related object "Customer Details" and click next.
- Next >> Next >> Save

GARAGE MANAGEMENT SYSTEM

➤ Creation of Lookup Field on Service records Object:

- Go to setup >> click on Object Manager >> type object name (Service records) in search bar >> click on the object.

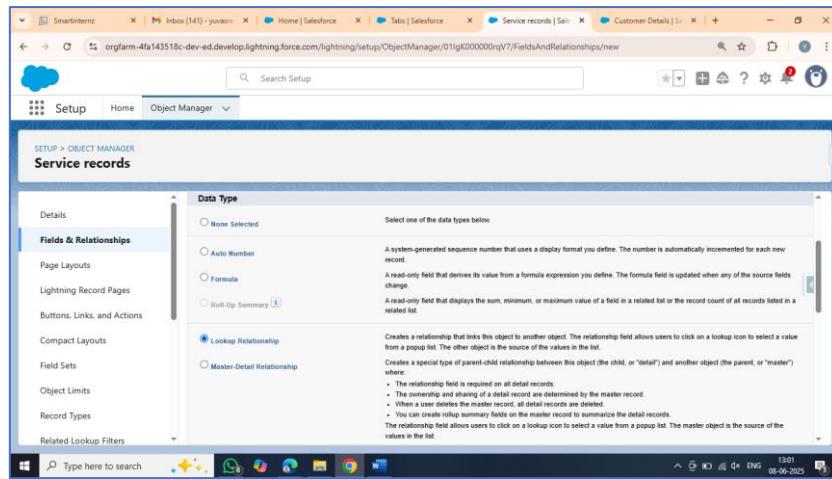
The screenshot shows the Salesforce Object Manager interface. In the search bar at the top right, the text 'SERV' is typed. Below the search bar, a table lists various objects, including 'Service records'. The 'Service records' row is highlighted. To the right of the table, there is a 'Schema Builder' button and a 'Create' button. The status bar at the bottom right indicates the date and time as '08-06-2025'.

- Now click on "Fields & Relationships" >> New

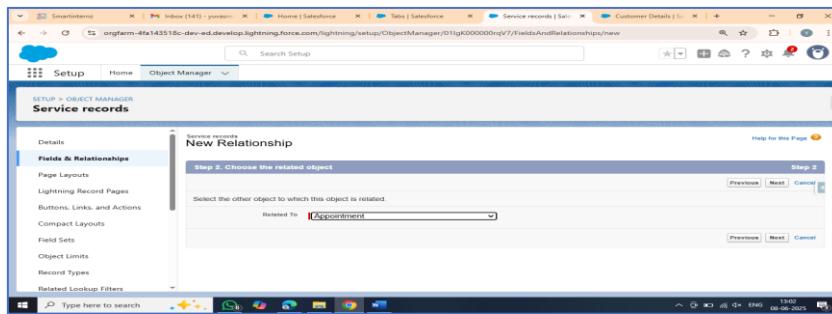
The screenshot shows the 'Fields & Relationships' page for the 'Service records' object. On the left, there is a sidebar with options like 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', and 'Related Lookup Filters'. The main area displays a table titled 'Fields & Relationships' with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. Several fields are listed, including 'Appointment', 'Created By', 'Last Modified By', 'Owner', 'Quality Check Status', 'service date', and 'Service record Name'. The status bar at the bottom right indicates the date and time as '08-06-2025'.

- Select "Look-up relationship" as data type and click Next.

GARAGE MANAGEMENT SYSTEM



- Select the related object “Appointment” and click next.

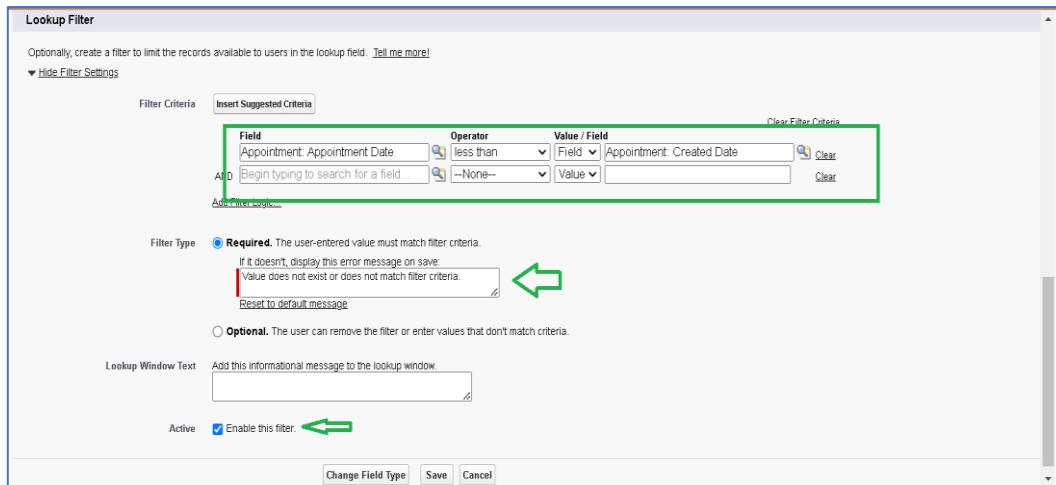


- Make it a required field so click on Required.



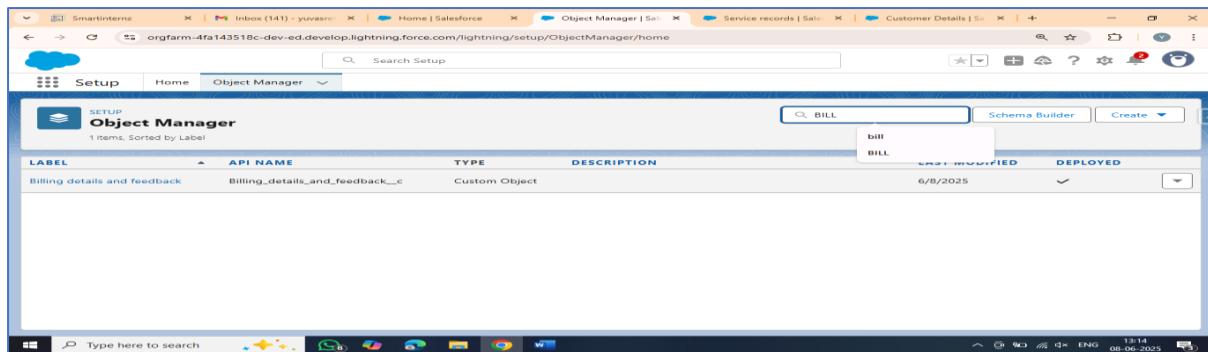
- Scroll down for Lookup Filter and click on Show filter settings.
- Now add the filter criteria.
- Field: Appointment: Appointment Date >> Operator: less than >> select field >> Appointment: Created Date
- Filter type should be Required.
- Error Message: Value does not match the criteria.
- Enable the filter by click on Active.
- Next >> Next >> Save.

GARAGE MANAGEMENT SYSTEM

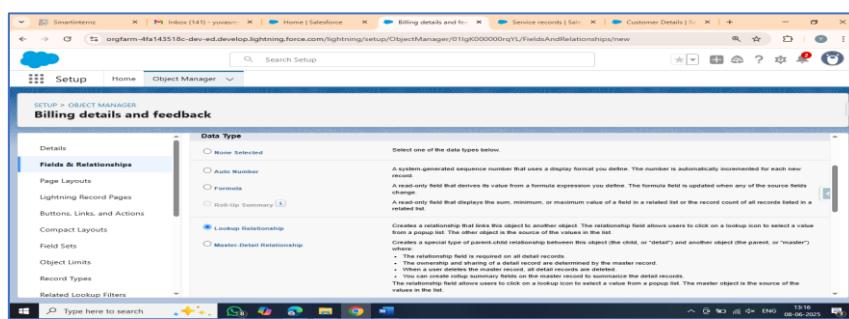


Creation of Lookup Field on Billing details and feedback Object:

- Go to setup >> click on Object Manager >> type object name (Billing details and feedback) in search bar >> click on the object.



- Now click on "Fields & Relationships" >> New.
- Select "Look-up relationship" as data type and click Next.



- Select the related object "Service records" and click next.
- Next >> Next >> Save & new.

GARAGE MANAGEMENT SYSTEM

ACTIVITY -3 : Creation of Checkbox Fields

Creation of Checkbox Field on Appointment Object:

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



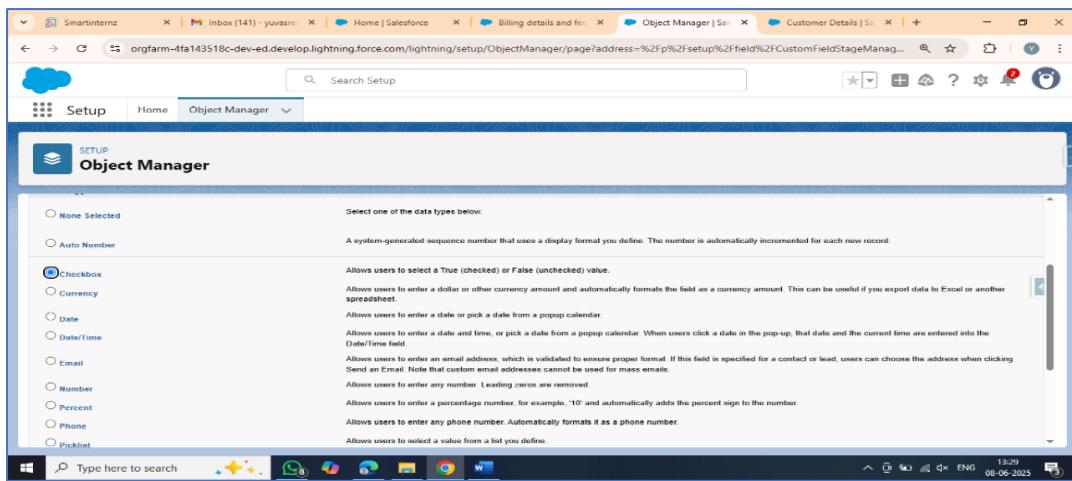
- Give the Field Label: Maintenance service
- Field Name: is auto populated
- Default value: unchecked

- Click on next >> next >> save.

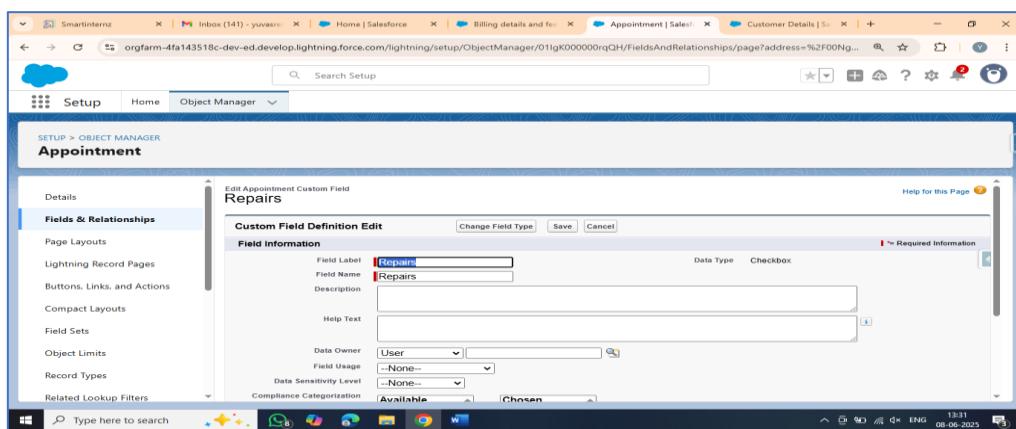
Creation of Another Checkbox Field on Appointment Object :

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

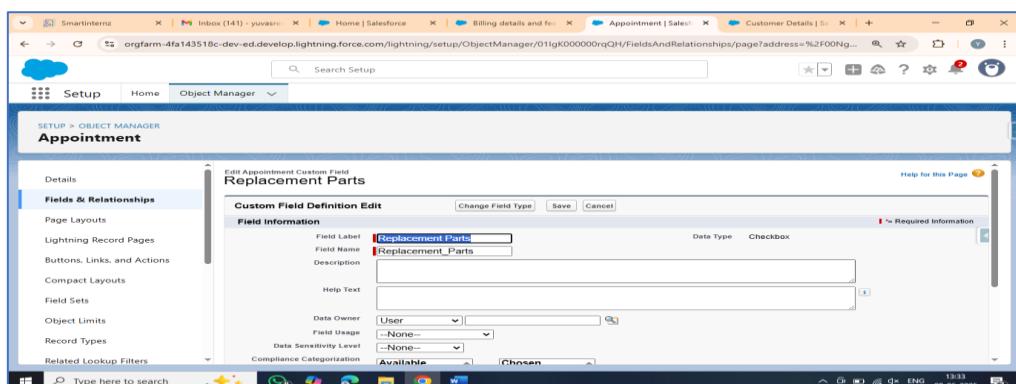
GARAGE MANAGEMENT SYSTEM



- Give the Field Label: Repairs
- Field Name: is auto populated
- Default value: unchecked



- Click on next >> next >> save.
- Follow the same and create another checkbox with given names
- Give the Field Label : Replacement Parts
- Field Name: is auto populated

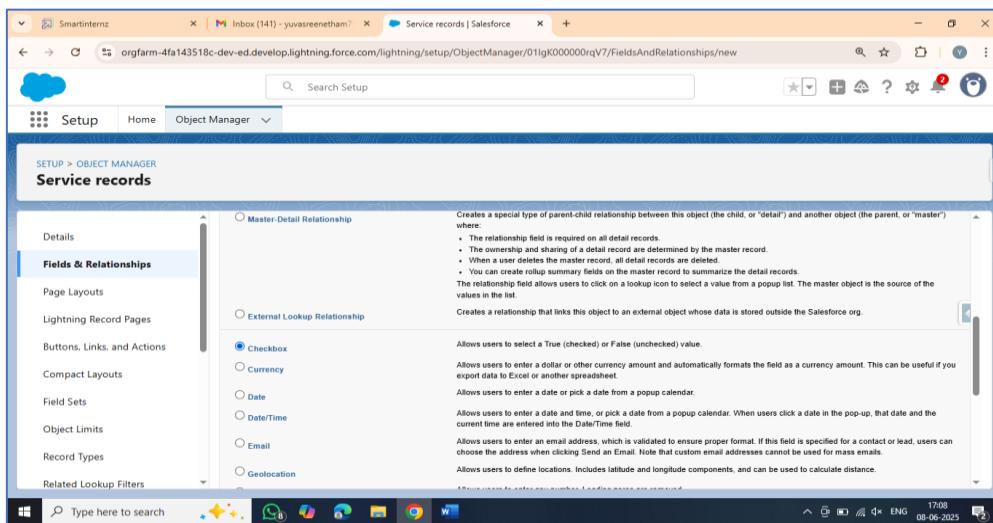


GARAGE MANAGEMENT SYSTEM

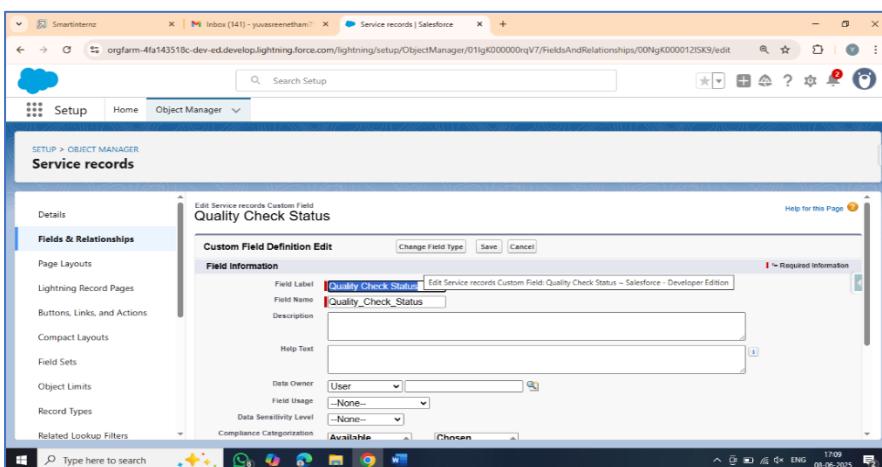
- Default value: unchecked
- Click on next >> next >> save.

Creation of Checkbox Field on Service records Object :

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



- Give the Field Label: Quality Check Status
- Field Name : is auto populated
- Default value : uncheck



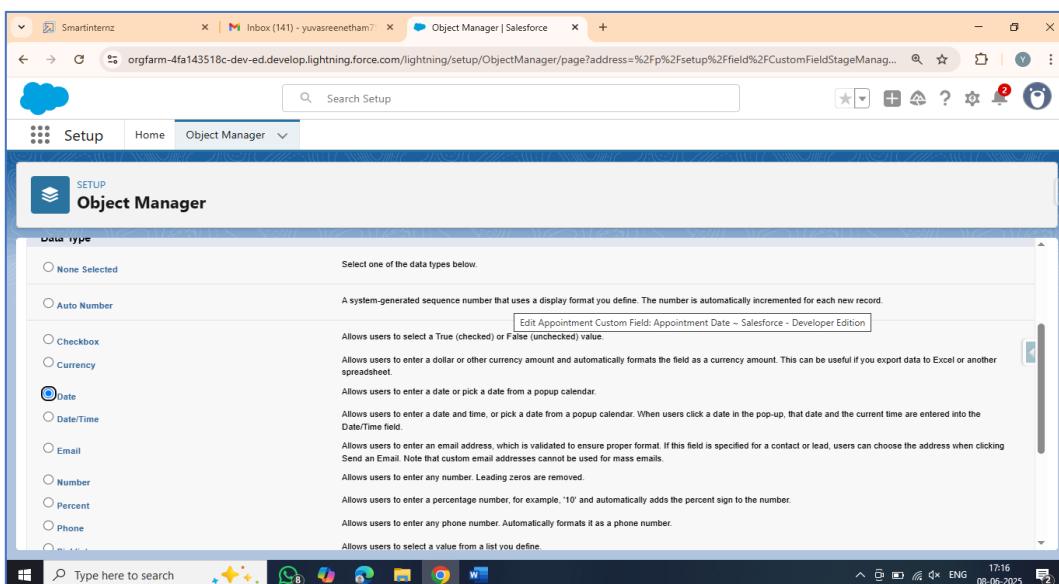
- Click on next >> next >> save.

GARAGE MANAGEMENT SYSTEM

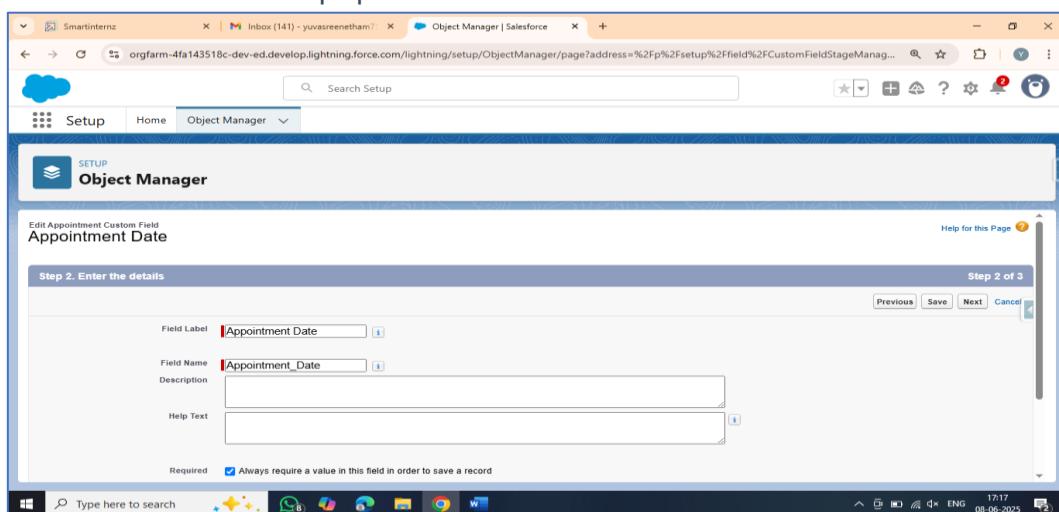
ACTIVITY – 4 : Creation of date Fields

Creation of Date Field on Appointment Object:

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



- Give the Field Label: Appointment Date
- Field Name : is auto populated



- Make it as a Required field by click on the Required option.
- Click on next >> next >> save.

GARAGE MANAGEMENT SYSTEM

ACTIVITY – 5 :- Creation of Currency Fields

Creation of Currency Field on Appointment Object :

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

Step 2. Enter the details

Field Label: Service Amount

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

Length: 18 Decimal Places: 0

Field Name: Service_Amount

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

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

Appointment
New Custom Field

Step 3. Establish field-level security

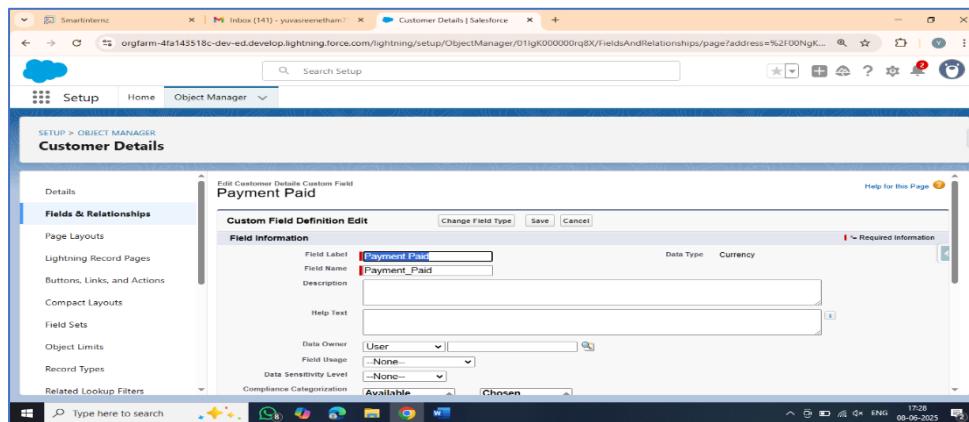
Field Level Security for Profile	Visible	Read-Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>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

- Click on next >> save.

GARAGE MANAGEMENT SYSTEM

Creation of Currency Field on Billing details and feedback Object :

- Go to setup >> click on Object Manager >> type object name(Appointment) in the search bar >> click on the object.
- Now click on “Fields & Relationships” >> New.
- Change the label name as mentioned.
- Give the Field Label : Payment Paid
- Field name : is auto populated



GARAGE MANAGEMENT SYSTEM

ACTIVITY – 6 :- Creation of Text Fields

- Go to setup >> click on Object Manager >> type object name(Appointment) in the search bar >> click on the object.
- Now click on “Fields & Relationships” >> New.
- Select “Text” as data type and click Next.
- Give the Field Label : Vehicle number plate

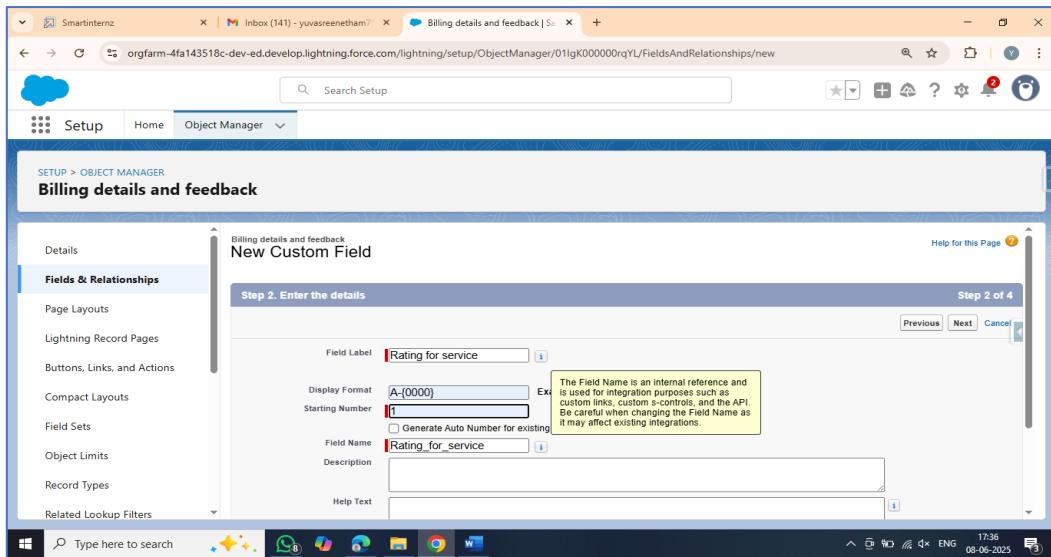
The screenshot shows the configuration of a new text field. The 'Field Label' is set to 'Vehicle number plate'. The 'Length' is specified as 10. The 'Field Name' is 'Vehicle_number_plate'. Under the 'Required' section, the checkbox is checked. Under 'Unique', both 'Do not allow duplicate values' (selected) and 'Treat "ABC" and "abc" as different values (case insensitive)' (selected) are checked. There are also options for 'External ID' and 'Auto add to custom report type'.

- Field Name : is auto populated
- Length : 10
- Make field as Required and Unique.
- Click on next >> next >> save.

Creation of Text Fields in Billing details and feedback object :

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

GARAGE MANAGEMENT SYSTEM



- Click on next >> next >> save

GARAGE MANAGEMENT SYSTEM

ACTIVITY – 7 :- Creation of Picklist Fields

Creation of Picklist Fields in Service records object :

- Go to setup >> click on Object Manager >> type object name(Service records) in search bar >> click on the object.
- Click on fields & relationship >> click on New.
- Select Data type as “Picklist” and click Next.
- 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.
- The values are: Started, Completed.

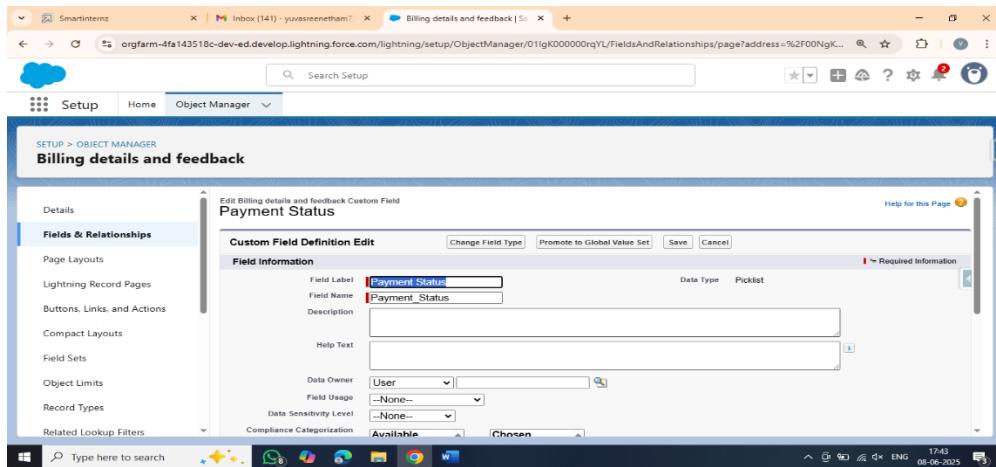


- Click Next.
- Next >> Next >> Save.

Creation of Picklist Fields in Billing details and feedback object :

- Go to setup >> click on Object Manager >> type object name(Billing details and feedback) in search bar >> click on the object.
- Click on fields & relationship >> click on New.
- Select Data type as “Picklist” and click Next.
- 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.
- The values are: Pending, Completed.

GARAGE MANAGEMENT SYSTEM



- Click Next.
- Next >> Next >> Save.

GARAGE MANAGEMENT SYSTEM

ACTIVITY – 8 :- Creating Formula Field in Service records Object

- Go to setup >> click on Object Manager >> type object name(Service records) in search bar >> click on the object.
- Click on fields & relationship >> click on New.
- Select Data type as “Formula” and click Next.
- Give Field Label and Field Name as “service date” and select formula return type as “Date” and click next.

Step 2. Choose outputtype

Step 2 of 5

Field Label	<input type="text" value="service date"/>	Field Name	<input type="text" value="service_date"/>	Previous	Next	Cancel
-------------	---	------------	---	----------	------	--------

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

Formula Return Type

None Selected

Select one of the data types below

Checkbox
 Currency
 Date
 Date/Time

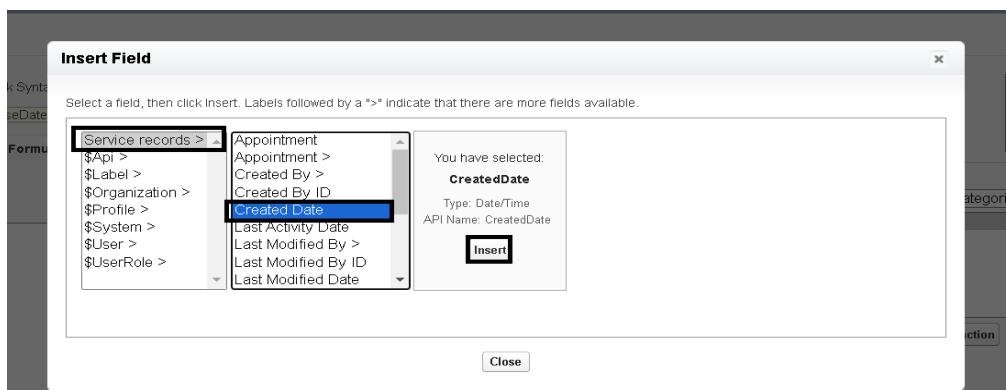
Calculate a boolean value
Example: `TODAY() > CloseDate`

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

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

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

- Insert field formula should be : Created Date



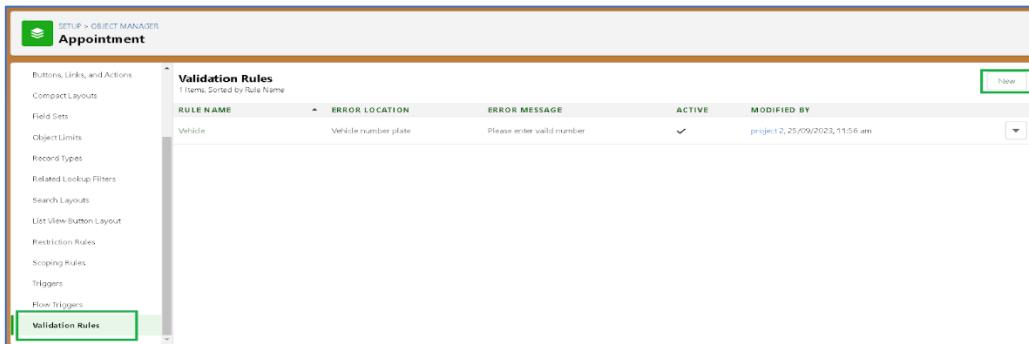
GARAGE MANAGEMENT SYSTEM

MILESTONE – 6

Validation rule

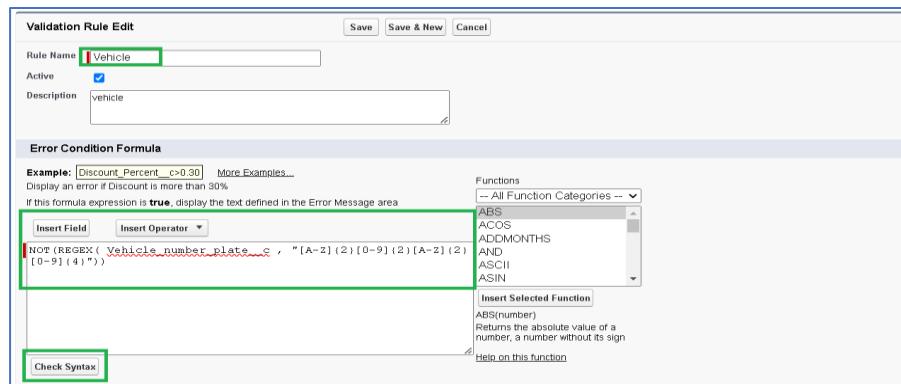
ACTIVITY -1 :- To create a validation rule to an Appointment Object

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

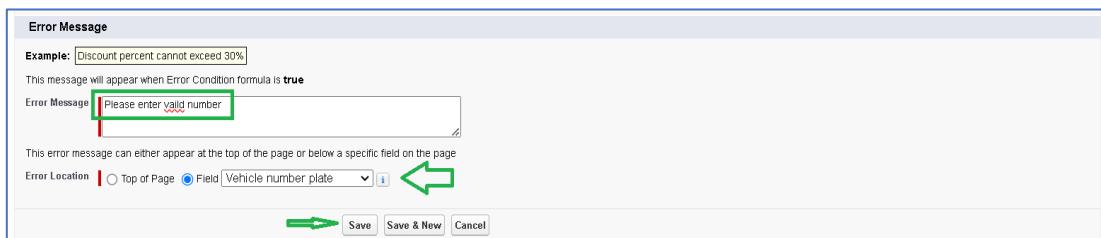


- Enter the Rule name as " Vehicle ".
- Insert the Error Condition Formula as : -

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



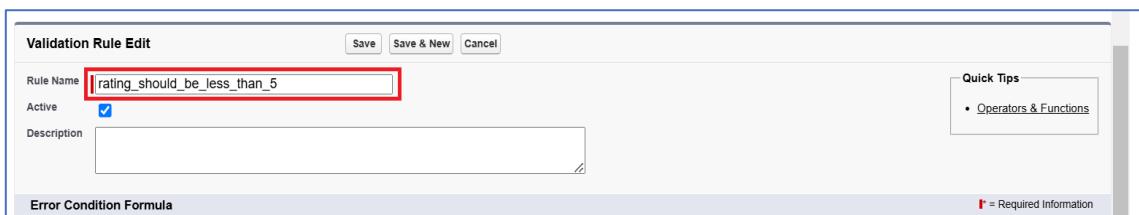
- Enter the Error Message as "Please enter valid number ", select the Error location as Field and select the field as "Vehicle number plate", and click Save.



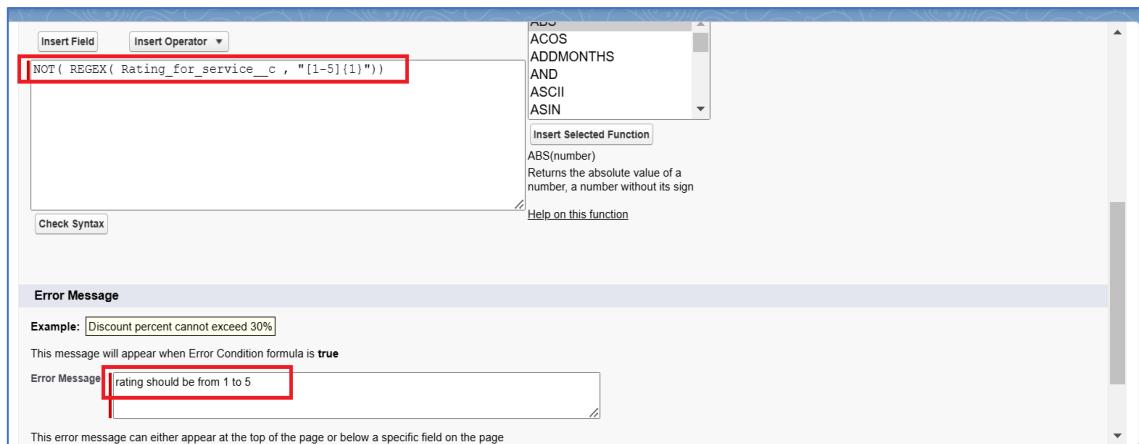
GARAGE MANAGEMENT SYSTEM

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

- Go to the setup page >> click on object manager >> From drop down click edit for Billing details and feedback object.
- Click on the validation rule >> click New.
- Enter the Rule name as " rating_should_be_less_than_5".
- Insert the Error Condition Formula as :-
- NOT(REGEX(Rating_for_service_c , "[1-5]{1}"))



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



GARAGE MANAGEMENT SYSTEM

MILESTONE- 7

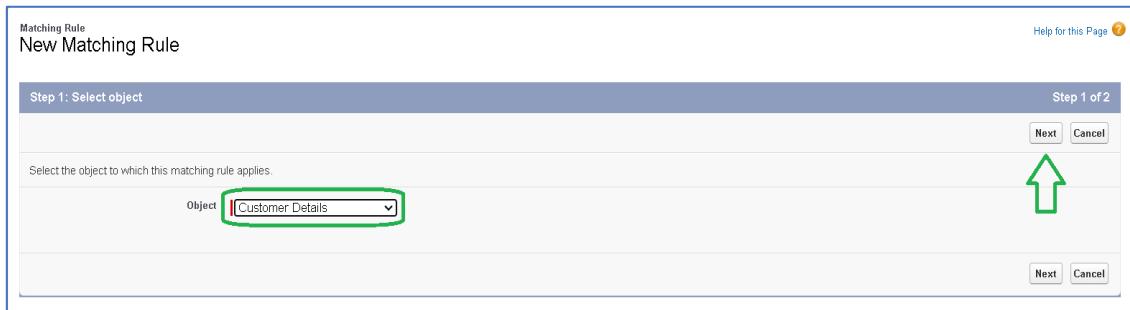
Duplicate rule

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

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



- Select the object as Customer details and click Next.



- Give the Rule name : Matching customer details
- Unique name : is auto populated
- Define the matching criteria as

Field Matching Method

1. Gmail Exact

2. Phone Number Exact

- Click save.
- After Saving Click on Activate.

GARAGE MANAGEMENT SYSTEM

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	AND
Gmail	Exact	<input type="checkbox"/>	AND
Phone Number	Exact	<input type="checkbox"/>	AND
--None--	Exact	<input type="checkbox"/>	AND
--None--	Exact	<input type="checkbox"/>	AND
--None--	Exact	<input type="checkbox"/>	AND

Add Filter Logic...

Buttons: Save Cancel

Matching Rule
matching Customer details

Matching Rule Detail

Object: Customer Details
Rule Name: matching Customer details
Unique Name: matching_Customer_details
Description:
Matching Criteria: {Customer Details: Gmail EXACT MatchBlank = FALSE} AND {Customer Details: Phone_Number EXACT MatchBlank = FALSE}
Status: Inactive
Created By: project_2, 25/09/2023, 10:15 am
Modified By: project_2, 10/10/2023, 3:32 pm

Buttons: Edit Delete Clone Activate

ACTIVITY – 2:- To create a Duplicate rule to an Customer details

- Go to quick find box in setup and search for Duplicate rules.
- 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

Rule Name	Description	Matching Rule	Active	Last Modified By	Last Modified Date
Customer Detail Duplicate	Identify accounts that duplicate other accounts.	standard.Customer.details	<input type="checkbox"/>	sa2	10/10/2023
Standard Account Duplicate Rule	Identify contacts that duplicate other contacts and leads.	standard.Account.Matching.Rule	<input checked="" type="checkbox"/>	sa2	24/09/2023
Standard Contact Duplicate Rule	Identify leads that duplicate other leads and contacts.	standard.Contact.Matching.Rule	<input checked="" type="checkbox"/>	sa2	24/09/2023
Standard Lead Duplicate Rule		standard.Lead.Matching.Rule	<input checked="" type="checkbox"/>	sa2	24/09/2023
Contact		standard.Contact.Matching.Rule	<input checked="" type="checkbox"/>	sa2	24/09/2023
Account		standard.Account.Matching.Rule	<input type="checkbox"/>	sa2	10/10/2023
Lead		standard.Lead.Matching.Rule	<input checked="" type="checkbox"/>	sa2	24/09/2023

- Give the Rule name as : Customer Detail duplicate
- Scroll a little in Matching rule section

GARAGE MANAGEMENT SYSTEM

Edit Duplicate Rule
Customer Detail duplicate

Help for this Page

Rule Details	<div style="display: flex; justify-content: space-between;"> Save Save & New Cancel </div> <p>Rule Name: Customer Detail duplicate </p> <p>Description: <input type="text"/></p> <p>Object: Customer Details</p> <p>Record-Level Security: <input checked="" type="radio"/> Enforce sharing rules <input type="radio"/> Bypass sharing rules </p>
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 checked="" type="checkbox"/> Alert <input type="checkbox"/> Report Alert Text: Use one of these records?	

- Select the matching rule : Matching customer details
- And Click on save.
- After saving the Duplicate Rule, Click on Activate.

Matching Rules

Define how duplicate records are identified.

Compare Customer Details With:	Customer Details
Matching Rule:	matching Customer details
Matching Criteria:	
(Customer Details: Email EXACT MatchBlank = FALSE) AND (Customer Details: Phone_Number EXACT MatchBlank = FALSE)	
Field Mapping: Mapping Selected	
Add Rule Remove Rule	
Conditions Optionally, specify the conditions a record must meet for the rule to run.	
Field <input type="button" value="–None–"/> Operator <input type="button" value="–None–"/> Value <input type="text"/> AND Field <input type="button" value="–None–"/> Operator <input type="button" value="–None–"/> Value <input type="text"/> AND Field <input type="button" value="–None–"/> Operator <input type="button" value="–None–"/> Value <input type="text"/> AND Field <input type="button" value="–None–"/> Operator <input type="button" value="–None–"/> Value <input type="text"/> AND Field <input type="button" value="–None–"/> Operator <input type="button" value="–None–"/> Value <input type="text"/>	
Add Filter Logic <div style="display: flex; justify-content: space-around;"> Save Save & New Cancel </div>	

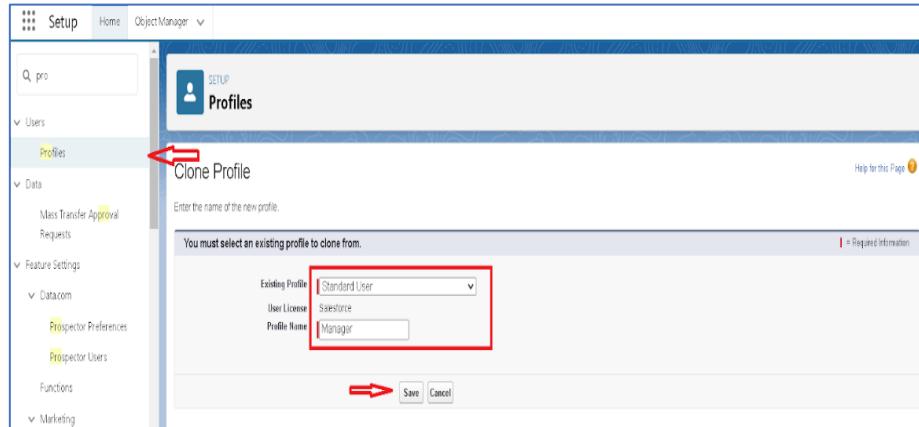
GARAGE MANAGEMENT SYSTEM

MILESTONE – 8

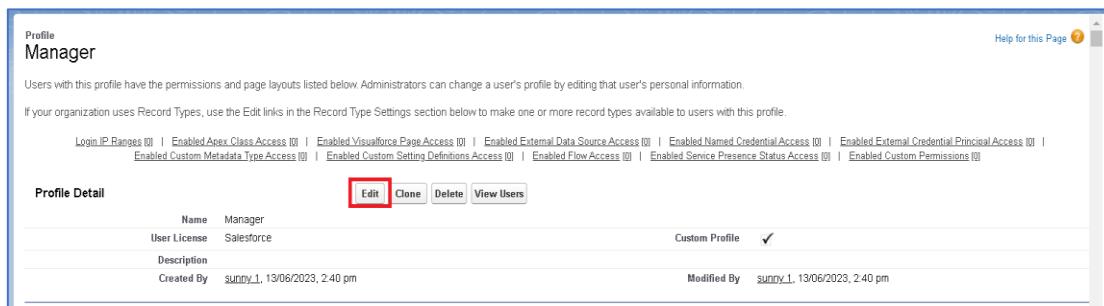
Profiles

ACTIVITY – 1 :- Manager Profile create a new profile:

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



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



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



- 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.

GARAGE MANAGEMENT SYSTEM

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

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

ACTIVITY – 2: sales person Profile

- 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.
- While still on the profile page, then click Edit.
- Select the Custom App settings as default for the GArage management.
- Scroll down to Custom Object Permissions and Give access permissions for Appointments,Billing details and feedback , service records and customer details And click save.
- objects as mentioned in the below diagram.

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

- And click save.

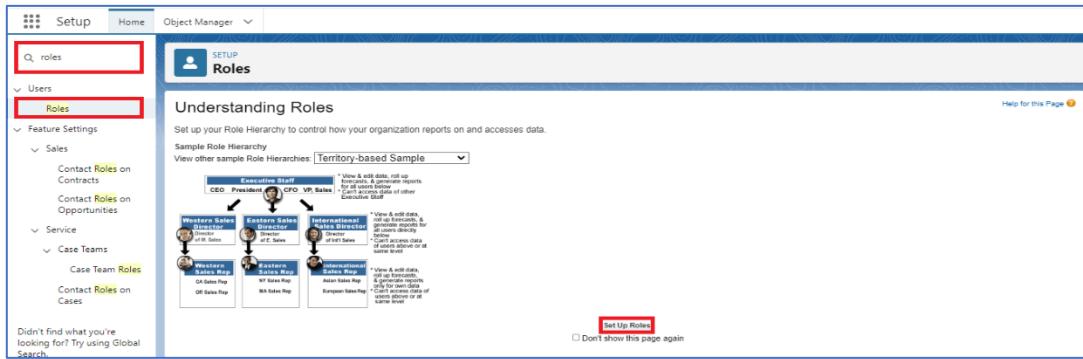
GARAGE MANAGEMENT SYSTEM

MILESTONE – 9 Role & Role Hierarchy

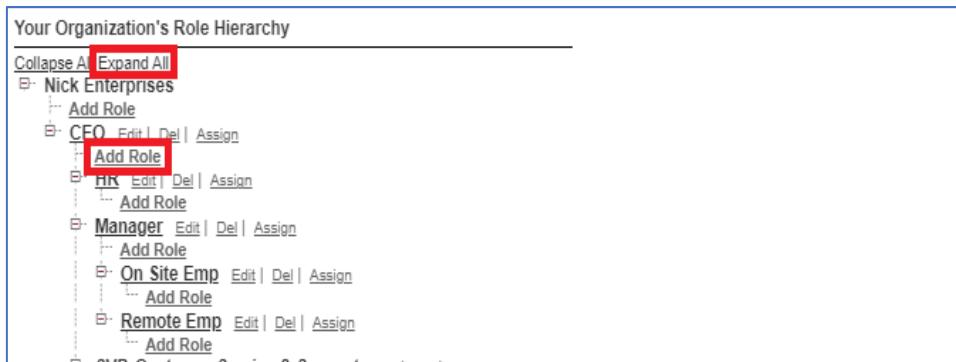
ACTIVITY – 1:- Creating Manager Role

Creating Manager Role:

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



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



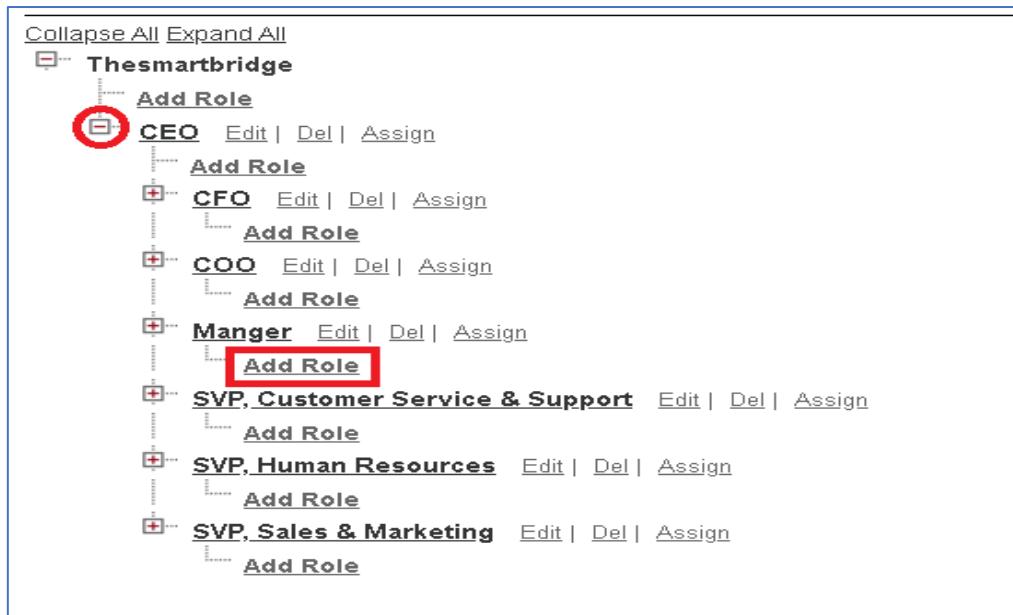
- Give Label as "Manager" and Role name gets auto populated. Then click on Save

GARAGE MANAGEMENT SYSTEM

ACTIVITY – 2:- Creating another roles

Creating another two roles under manager

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



- Give Label as "sales person" and Role name gets auto populated. Then click on Save.

GARAGE MANAGEMENT SYSTEM

MILESTONE – 10

Users

ACTIVITY – 1:- Create User

- Go to setup >> type users in quick find box >> select users >> click New user.

Action	Full Name	Alias	Username	Role	Active Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty_000pk000004tujug9.eddit09ckma@chatter.salesforce.com		✓ Chatter Free User
<input type="checkbox"/>	chukka_victorjoy	vchuk	victorjoy@red567.com	sales person	✓ sales person
<input type="checkbox"/>	EPIC_OrgFarm	OEPI	epic_9ebbf3fa80b4@orgfarm.com		✓ System Administrator
<input type="checkbox"/>	karpagareddy_ushasree	ukara	kaihsa@33.com	sales person	✓ sales person
<input type="checkbox"/>	Mikaelson_Niklaus	nmika	niklaus@blue23.com	Manager	✓ Manager
<input type="checkbox"/>	netham_yuva_stree	yuv	yuvashreenetham751101@agentforce.com		✓ System Administrator

- Fill in the fields

- First Name : Niklaus
- Last Name : Mikaelson
- Alias : Give a Alias Name
- Email id : Give your Personal Email id
- Username : Username should be in this form: text@text.text
- Nick Name : Give a Nickname
- Role : Manager
- User licence : Salesforce
- Profiles : Manager.

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New User

User Edit Save Save & New Cancel

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

- Save.

ACTIVITY – 2 :- creating another users

- Go to setup >> type users in quick find box >> select users >> click New user.

Smartinternz X | Inbox (141) - yuvacreenetham? | Object Manager | Salesforce | Users | Salesforce

Setup Home Object Manager

uSE

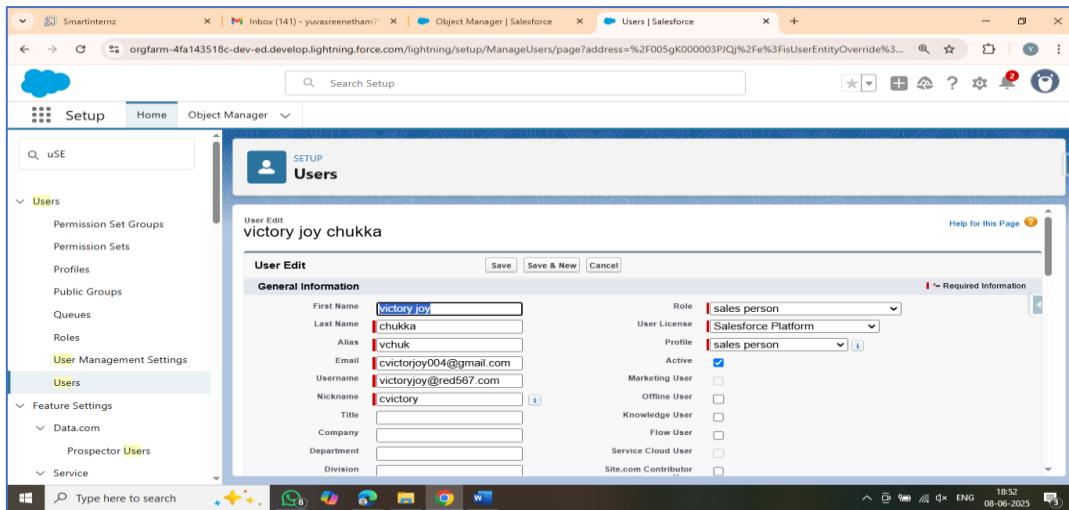
Users

All Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty.00000004luojao.edditto@ckma@chatter.salesforce.com	sales person	✓	Chatter Free User
<input type="checkbox"/>	chukka_victory.joy	vchuk	victoryjoy@red567.com	sales person	✓	sales person
<input type="checkbox"/>	EPIC_OrgFarm	OEPIIC	eric.9eb33ffab04@orgfarm.com	System Administrator	✓	System Administrator
<input type="checkbox"/>	karanapradhy_uhasree	uktara	kausa@13.com	sales person	✓	sales person
<input type="checkbox"/>	Mikaelson_Niklaus	nmika	niklaus@blue23.com	Manager	✓	Manager
<input type="checkbox"/>	netham_yuva sree	yuu	yuvacreenetham751101@agentforce.com	System Administrator	✓	System Administrator

- Fill in the fields
- First Name : victory joy
 - Last Name : chukka
 - Alias : vchuk
 - Email id : victoryjoy@gmail.com
 - Username : Username should be in this form: text@text.text
 - Nick Name : joy
 - Role : sales person
 - User licence : Salesforce Platform
 - Profiles : sales person

GARAGE MANAGEMENT SYSTEM



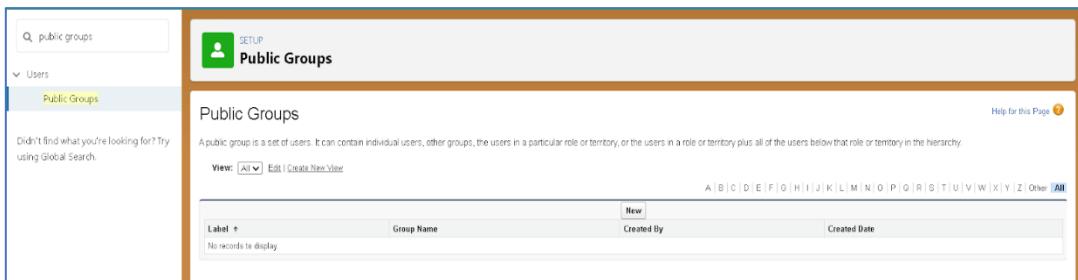
- Save.

GARAGE MANAGEMENT SYSTEM

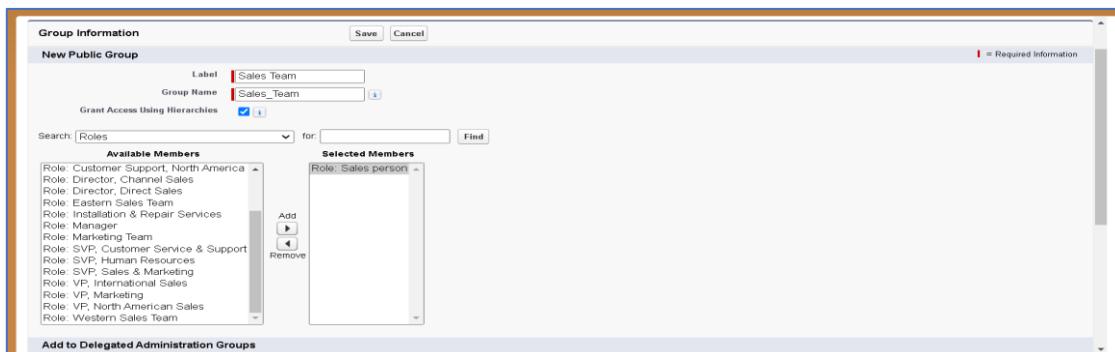
Milestone - 11 Public Groups

ACTIVITY – 1:- Creating New Public Group

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



- Give the Label as "sales team".
- Group name is auto populated.
- Search for Roles.
- In Available Members select Sales person and click on add it will be moved to selected member.
- Click on save.



GARAGE MANAGEMENT SYSTEM

Milestone – 12 Sharing Settings

ACTIVITY – 1:- Creating Sharing settings

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

- Click on save and refresh.
- Scroll down a bit, Click new on Service records sharing Rule

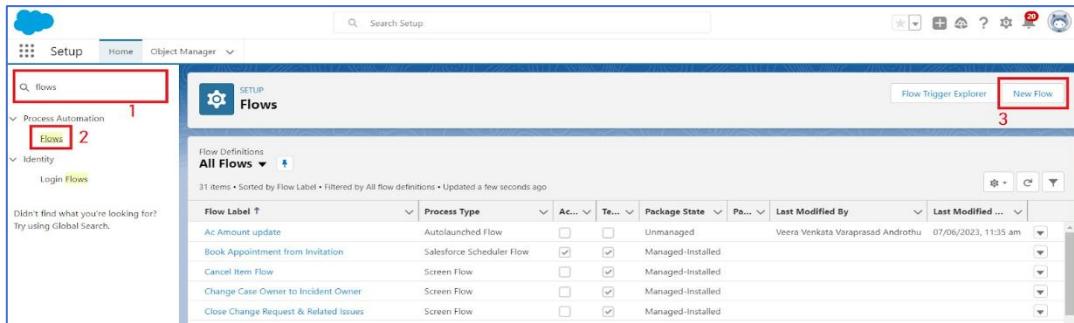
- Give the Label name as " Sharing setting"
- Rule name is auto populated.
- In step 3 : Select which records to be shared, members of " Roles " >> " Sales person "
- In step 4: share with, select " Roles " >> " Manager "
- In step 5 : Change the access level to " Read / write " .
- Click on save.

GARAGE MANAGEMENT SYSTEM

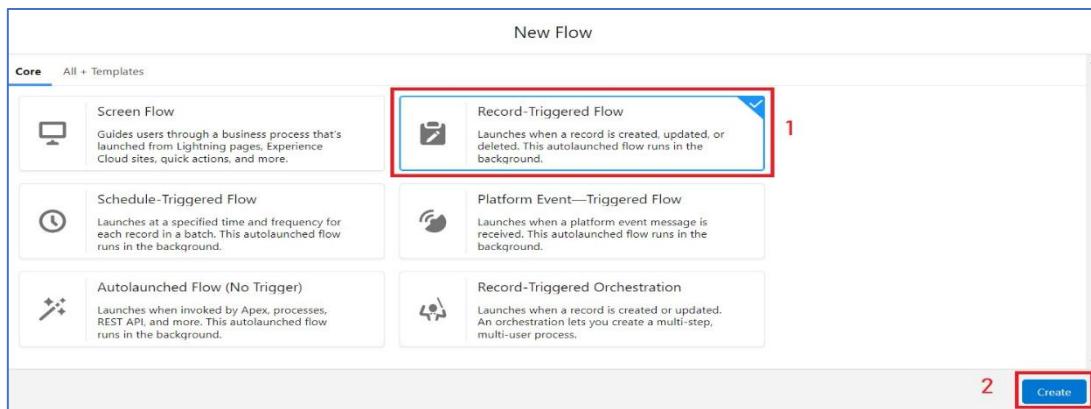
Milestone – 13 Fields

ACTIVITY – 1:- Create a Flow

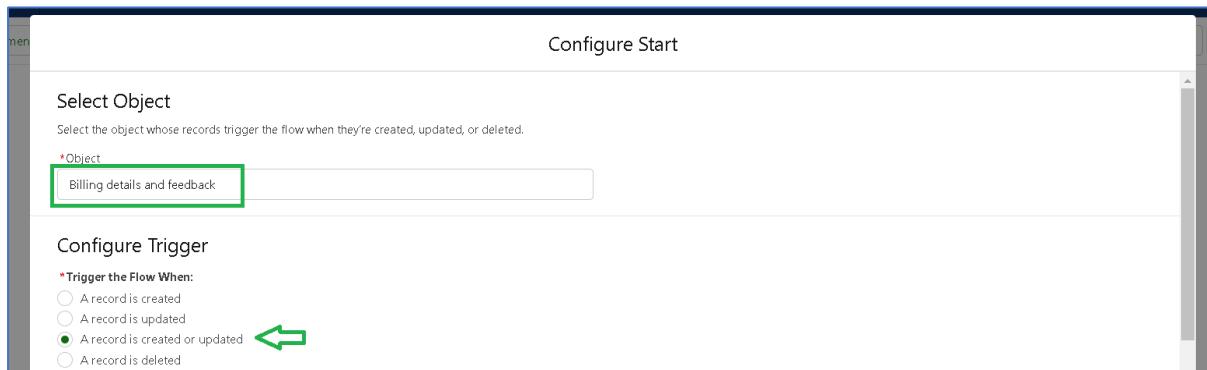
- Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.



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



- Select the Object as "Billing details and feedback" in the Drop down list.
- Select the Trigger Flow when: "A record is Created or Updated".



Select the Optimize the flow for: "Actions and Related Records" and Click on Done.

GARAGE MANAGEMENT SYSTEM

Set Entry Conditions

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

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

Condition Requirements

None

* Optimize the Flow for:

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.

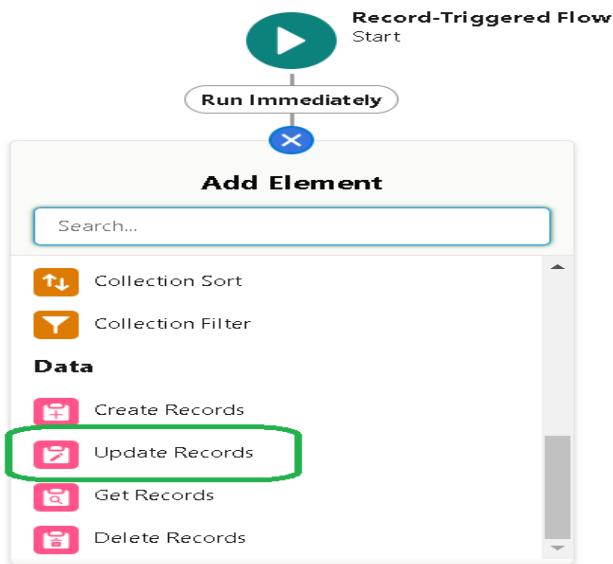
Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

3

4

Cancel Done

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



GARAGE MANAGEMENT SYSTEM

Give the Label Name : Amount Update

- Api name : is auto populated

Edit Update Records

Update Salesforce records using values from the flow.

*Label: Amount Update *API Name: 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...

+ Add Field

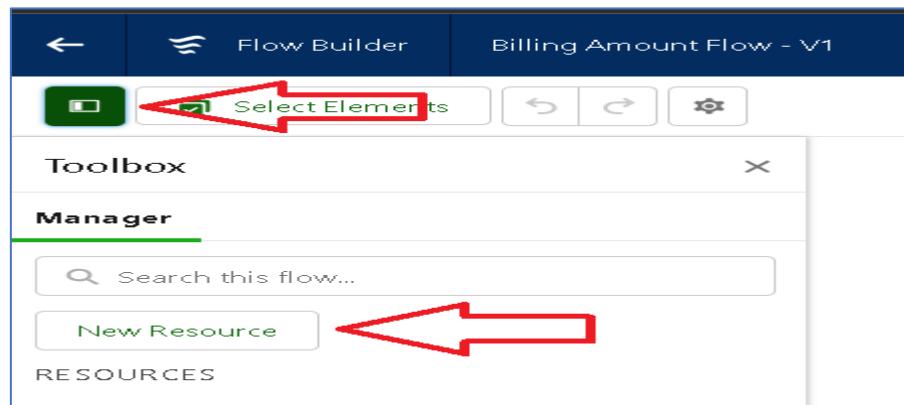
Cancel Done

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}

GARAGE MANAGEMENT SYSTEM

- Click On Done.
- Before creating another Element. Create a New Resource form Toolbox form top left.



- Click on the New Resource, And select Variable.
- Select the resource type as text template.
- Enter the API name as " alert".
- Change the view as Rich Text ? View to Plain Text.
- In body field paste the syntax that given below.

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

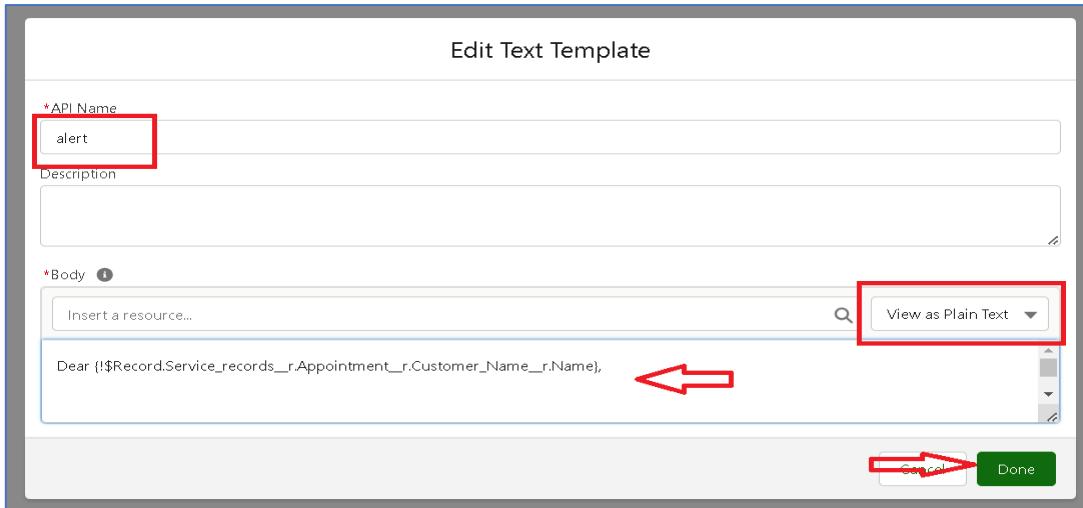
I hope this message finds you well. I wanted to take a moment to express my sincere gratitude for your recent payment for the services provided by our garage management team. Your prompt payment is greatly appreciated, and it helps us continue to provide top-notch services to you and all our valued customers.

Amount paid : {!\$Record.Payment_Paid__c}

Thank you for Coming .

- Click done.

GARAGE MANAGEMENT SYSTEM



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

GARAGE MANAGEMENT SYSTEM

Record-Triggered Flow  Start

Save as

[A New Version](#) [A New Flow](#)

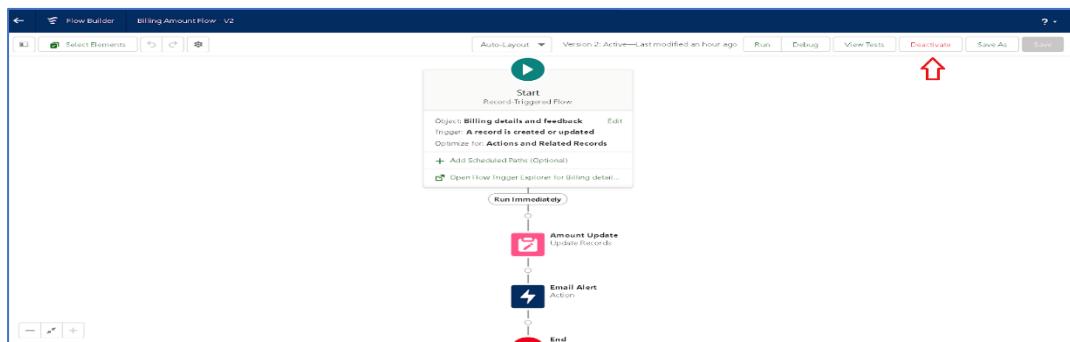
*Flow Label: Billing Amount Flow

*Flow API Name: Billing_Amount_Flow

Description:

Show Advanced

[Cancel](#) [Save](#)



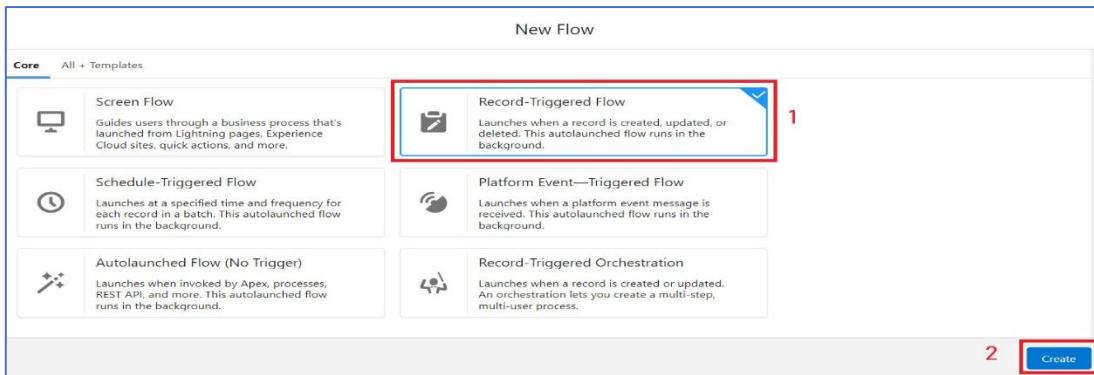
ACTIVITY – 2 :- Create another Flow

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

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

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

GARAGE MANAGEMENT SYSTEM



- Select the Object as " Service records" in the Drop down list.
- Select the Trigger Flow when: "A record is Created or Updated".
- Select the Optimise the flow for: "Actions and Related Records" and Click on Done.
- Under the Record-triggered Flow Click on "+" Symbol and In the Drop down List select the "Update records Element".
- Set a filter condition : All Conditions are met(AND)
- Field : Quality_Check_Status__c
- Operator : Equals
- Value : True
- And Set Field Values for the Billing details and feedback Record
- Field : Service_Status__c
- Value : Completed

GARAGE MANAGEMENT SYSTEM

Set Filter Conditions

Condition Requirements to Update Record

All Conditions Are Met (AND)

Field	Operator	Value
Quality_Check_Status_c	Equals	True X

+ Add Condition

Set Field Values for the Service record Record

Field	Value
Service_Status_c	Completed X

+ Add Field

- Click On Done.
- Click on save
- Given the Flow label as Update Service Status , Flow Api name will be auto populated.
- And click save, and click on activate.

MILESTONE – 14

Apex Trigger

ACTIVITY -1 :- Apex handler

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

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

```

1 public class AmountDistributionHandler {
2
3     public static void amountDist(list<Appointment__c> listApp){
4         list<Service_records__c> serList = new list <Service_records__c>();
5
6         for(Appointment__c app : listApp){
7             if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){
8                 app.Service_Amount__c = 10000;
9             }
10            else if(app.Maintenance_service__c == true && app.Repairs__c == true){
11                app.Service_Amount__c = 5000;
12            }
13            else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
14                app.Service_Amount__c = 8000;
15            }
16            else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
17                app.Service_Amount__c = 7000;
18            }
19            else if(app.Maintenance_service__c == true){
20                app.Service_Amount__c = 2000;
21            }
22        }
23    }
24
25 }
26
27
28
29
30
31

```

```

12
13            else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
14                app.Service_Amount__c = 8000;
15            }
16            else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
17                app.Service_Amount__c = 7000;
18            }
19            else if(app.Maintenance_service__c == true){
20                app.Service_Amount__c = 2000;
21            }
22            else if(app.Repairs__c == true){
23                app.Service_Amount__c = 3000;
24            }
25            else if(app.Replacement_Parts__c == true){
26                app.Service_Amount__c = 5000;
27            }
28        }
29    }
30
31

```

Code:

```

public class AmountDistributionHandler {

    public static void amountDist(list<Appointment__c> listApp){

```

GARAGE MANAGEMENT SYSTEM

```
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){
```

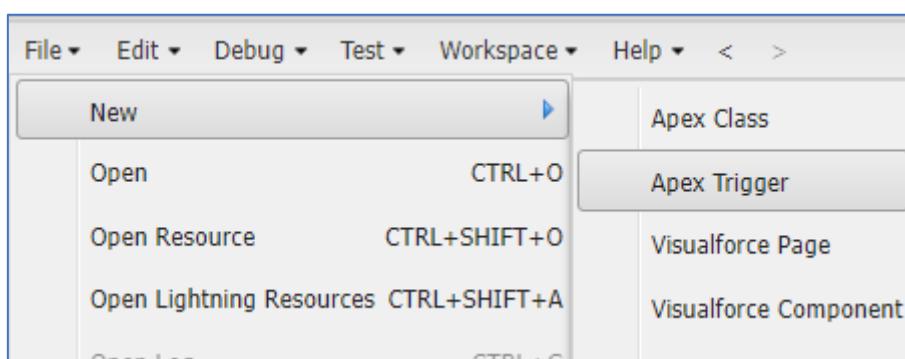
GARAGE MANAGEMENT SYSTEM

```
app.Service_Amount_c = 5000;  
}  
  
}  
  
}  
}
```

Trigger Handler :

How to create a new trigger :

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



GARAGE MANAGEMENT SYSTEM



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

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

Code:

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

```
if(trigger.isbefore && trigger.isinsert || trigger.isupdate){

    AmountDistributionHandler.amountDist(trigger.new);

}
```

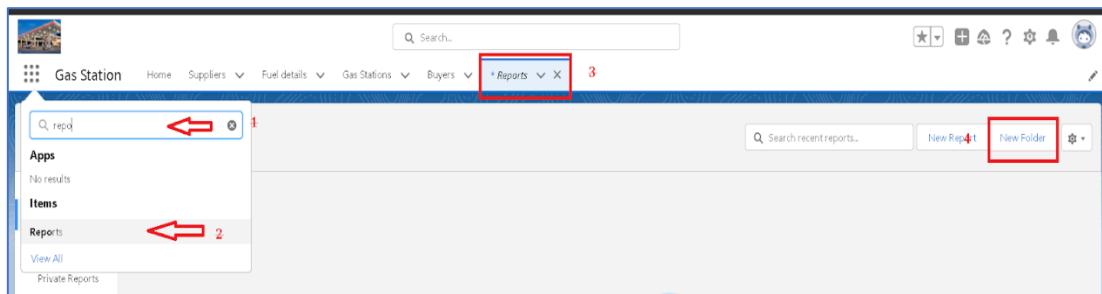
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MILESTONE – 15

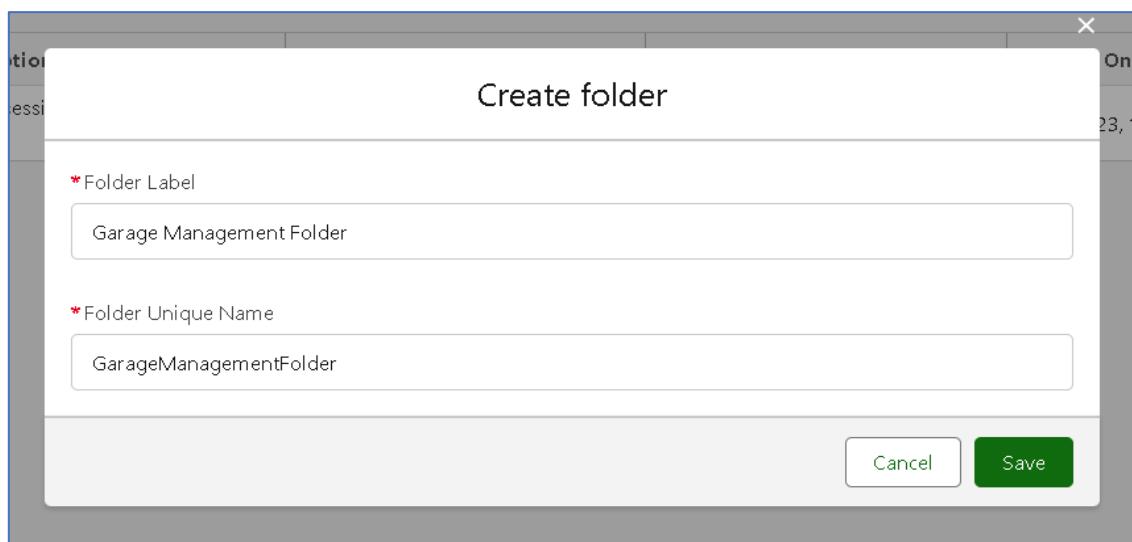
Reports

ACTIVITY – 1:- create a report folder

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



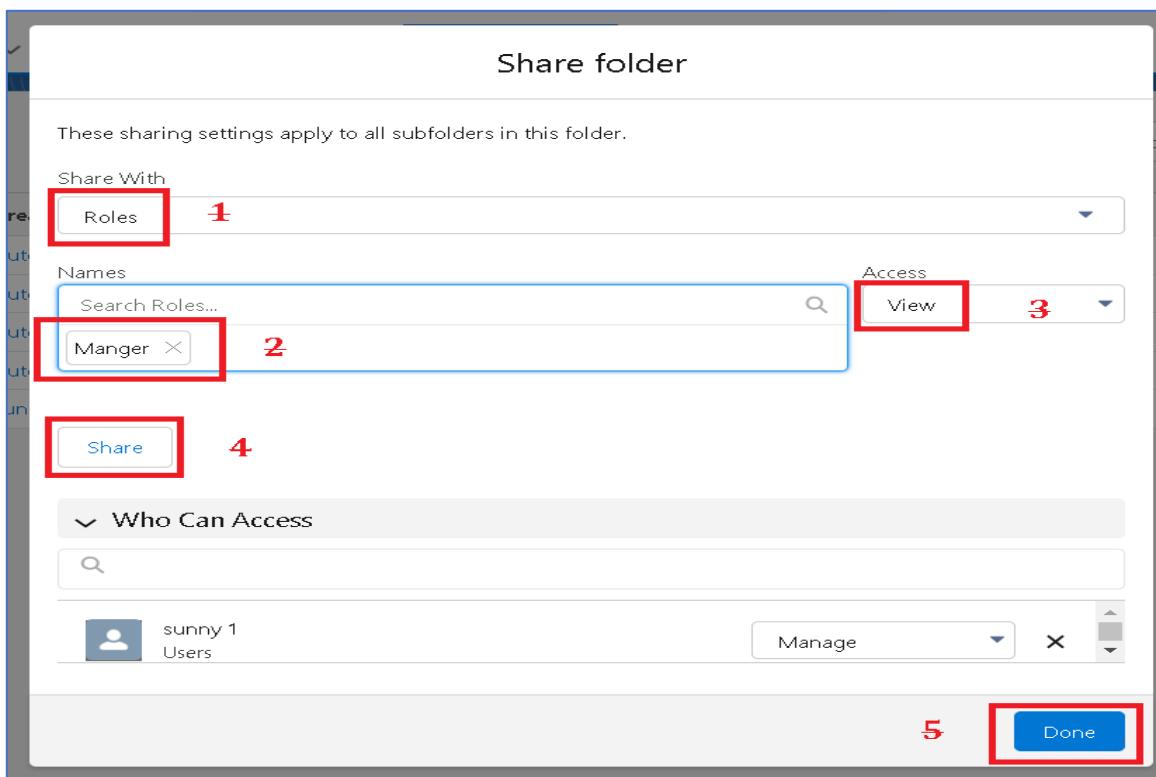
- Give the Folder label as "Garage Management Folder", Folder unique name will be auto populated.
- Click save.



GARAGE MANAGEMENT SYSTEM

ACTIVITY – 2: - Sharing a report folder

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



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ACTIVITY – 3:- Create Report Type

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

The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'Reports & Dashboards', the 'Report Types' link is highlighted with a green arrow. In the main content area, there is a heading 'All Custom Report Types' and a table listing several report types. At the top right of the table, there is a 'New Custom Report Type' button, which is also highlighted with a green arrow.

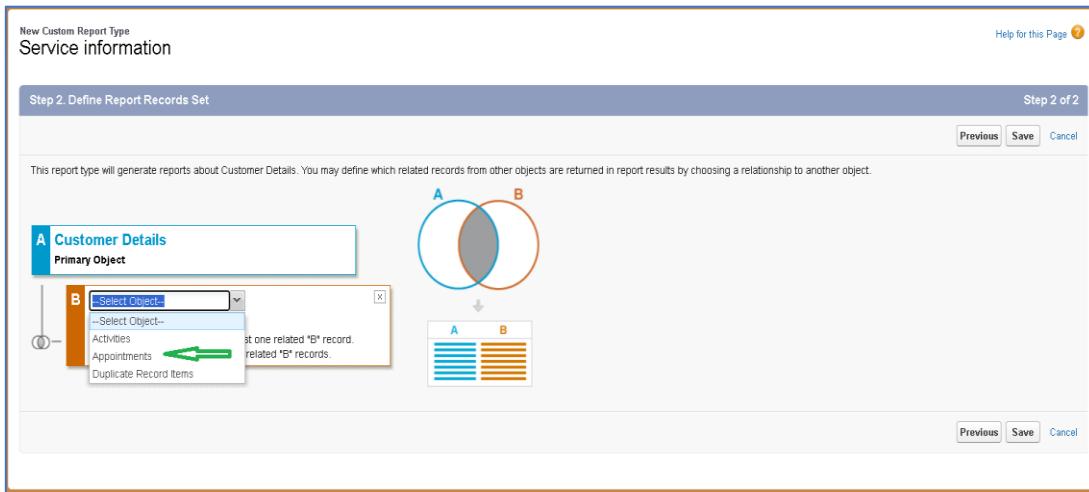
- Select the Primary object as " Customer details" .
- Give the Report type Label as " Service information "
- Report type Name is autopopulated.
- Keep the Description as same.
- Select Store in Category as " other Reports "
- Select the deployment status as " Deployed ", click on Next.

The screenshot shows the 'Report Type Focus' configuration page. It has sections for 'Identification' and 'Deployment'. In the 'Identification' section, the 'Primary Object' is set to 'Customer Details', 'Report Type Label' is 'Service information', 'Report Type Name' is 'Service_information', 'Description' is 'Service information', and 'Store in Category' is 'Other Reports'. In the 'Deployment' section, the 'Deployment Status' is set to 'Deployed'. A green arrow points to the 'Next' button at the bottom right of the page.

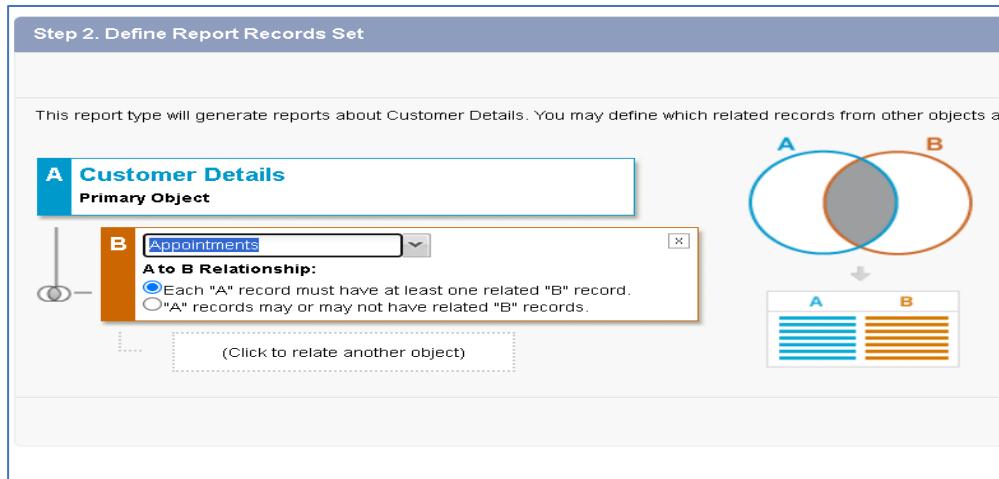
- now , Click on Related object box.

GARAGE MANAGEMENT SYSTEM

- Click on Select Object, choose Appointment Object as shown in fig.

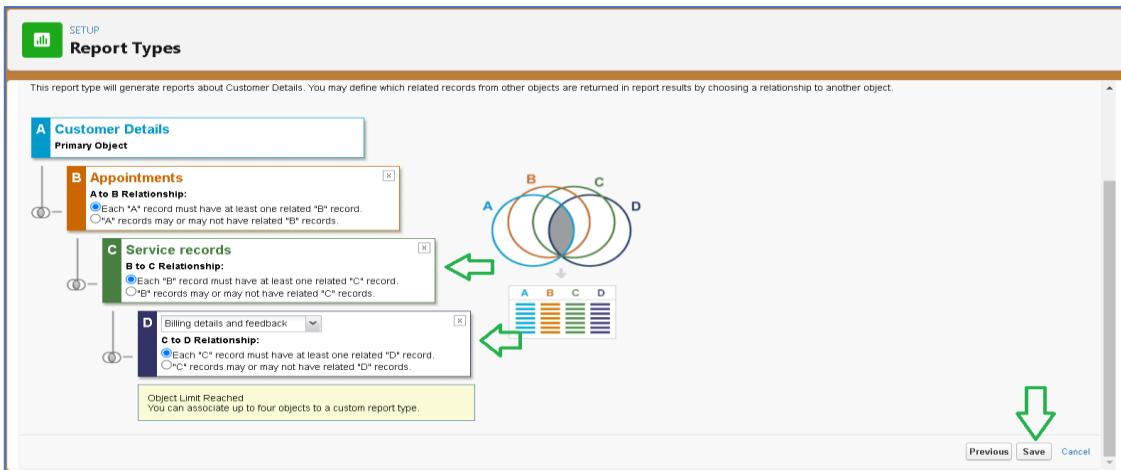


- Again, click to relate another object.



- And select the related object as " service records".
- Repeat the process and select the related object as " Billing details and feedback".
- And click on save.

GARAGE MANAGEMENT SYSTEM

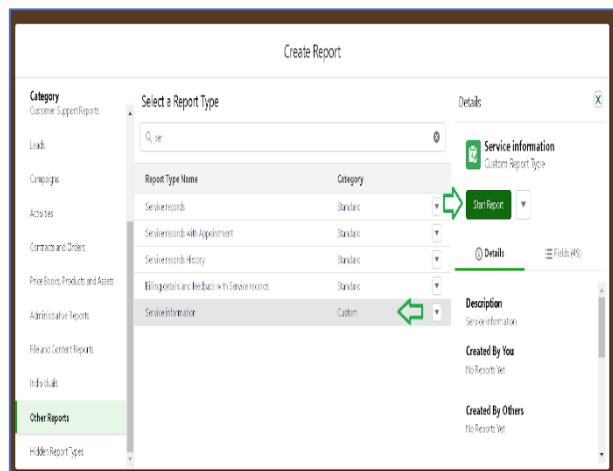


ACTIVITY – 4 :- Create Report

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

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

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



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- Their outline pane is opened already, select the fields that mentioned below in column section.
 - Customer name
 - Appointment Date
 - Service Status
 - Payment paid
- Remove the unnecessary fields.
- Select the fields that mentioned below in GROUP ROWS section.
 - Rating for Service
- Select the fields that mentioned below in GROUP

The screenshot shows the Salesforce Report Builder interface. A report titled "New Service information Report" is displayed. The report includes a table with columns for Payment Status (Started, Completed), Rating for service (1, 2, 3, 4), and Sum of Payment Paid. There is also a chart showing the sum of payment paid across different rating categories. The interface includes various filters, groupings, and summary options.

Payment Status	Rating for service	Sum of Payment Paid
Started	1	\$0
	2	\$0
	3	\$123
Completed	1	\$0
	2	\$123
	3	\$0
Total		\$0 \$123 \$123

The screenshot shows a "Save Report" dialog box. It has fields for Report Name (containing "New Service information Report"), Report Unique Name (containing "New_Service_information_Report_oVu"), Report Description (empty), and a Folder dropdown (containing "Garage Management Folder"). At the bottom are "Cancel" and "Save" buttons.

GARAGE MANAGEMENT SYSTEM

MILESTONE – 16

Dashboards

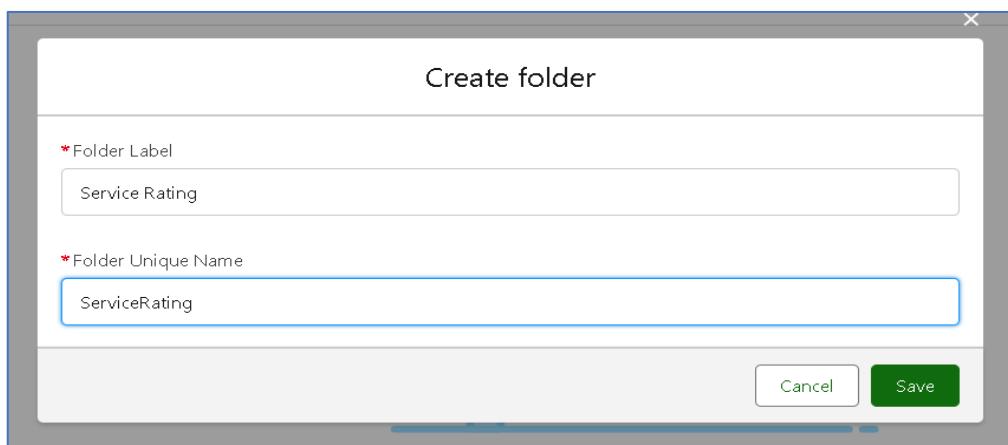
ACTIVITY – 1 :- Create Dashboard Folder

- Click on the app launcher and search for dashboard.
- Click on dashboard tab.

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

- Sidebar:** Shows 'Recent' dashboards (2 items) and 'Folders' (All Folders).
- Table:** Displays two dashboards:
 - Customer Review:** Service Rating, Created by yuva sree netham, Created On 6/6/2025, 8:25 AM.
 - Enablement Dashboard Spring '24:** Enablement Dashboard, Automated Process, Created On 5/22/2025, 10:17 AM.
- Top Bar:** Includes a search bar, 'New Dashboard' and 'New Folder' buttons, and other navigation links like Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, and More.

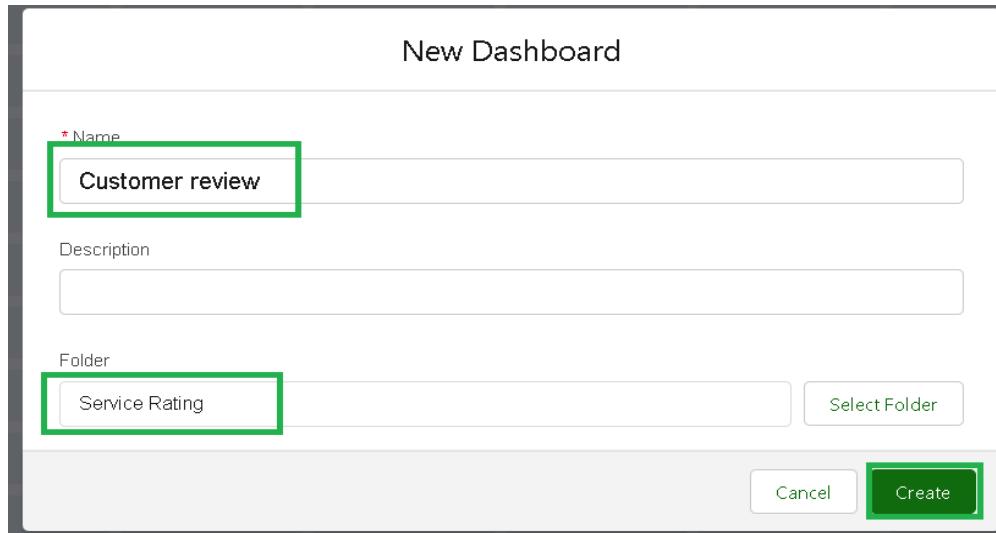
- Click new folder, give the folder label as " Service Rating dashboard".
- Folder unique name will be auto populated.
- Click save.



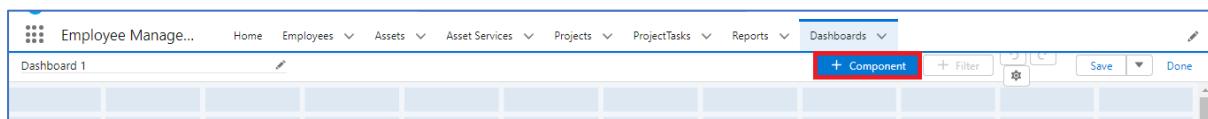
GARAGE MANAGEMENT SYSTEM

ACTIVITY – 2: Create Dashboard

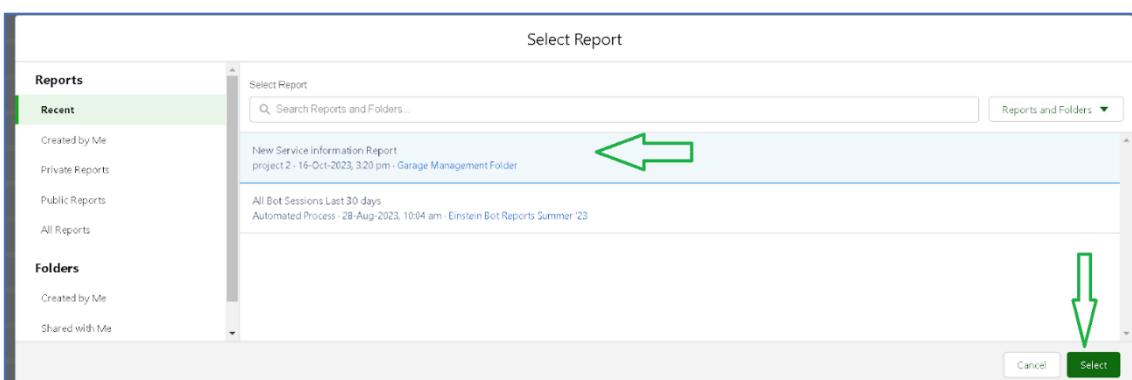
- Go to the app >> click on the Dashboards tabs.
- Give a Name and select the folder that created, and click on create.



- Select add component



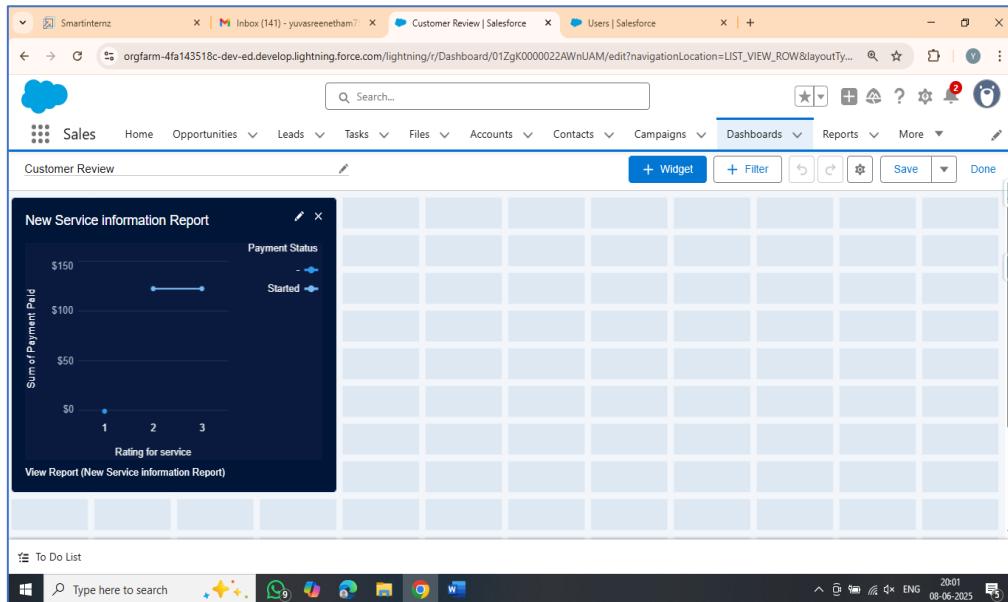
- Select a Report and click on select.



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

GARAGE MANAGEMENT SYSTEM

- Preview is shown below.



GARAGE MANAGEMENT SYSTEM

MILESTONE – 17

User Adoption

ACTIVITY – 1 : creating records

To create a record in the follow objects, follow these steps

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

New Customer Detail

* = Required Information

Information

* Customer Name: Mac

Phone number: 5678765567

Gmail: mac@gmail.com

Owner: Annapurna SmartBridge

Cancel Save & New Save

Now, Create the Appointment Record

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

GARAGE MANAGEMENT SYSTEM

Garage Management System

Customer Details Appointments Service records Billing details and feedback Reports Dashboards

Appointment app-016

Appointment Name: app-016

Customer Details: Mac

* Appointment Date: 13/11/2024

Maintenance service:

Repairs:

Replacement Parts:

Service Amount:

* Vehicle number plate: TS30EU0443

Created By: Annapurna SmartBridge, 18/11/2024, 3:28 pm

Modified By: Annapurna SmartBridge, 18/11/2024, 3:28 pm

Cancel **Save**

Now, Create a service Record

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

New Service record

* = Required Information

Information

Service Record Name: app-016

Owner: Annapurna SmartBridge

* Appointment: app-016

Quality Check Status:

Service Status: Started

Cancel **Save & New** **Save**

- Open the record and click on Quality check status as true.
- Click on save.

GARAGE MANAGEMENT SYSTEM

Service Record Name
ser-010

* Appointment
 X

Quality Check Status
 ↶

Service Status

service date
18/11/2024
This field is calculated upon save

Created By
 Annapurna SmartBridge, 18/11/2024, 4:32 pm

Cancel
Save

Last Modified By
 Annapurna SmartBridge, 18/11/2024, 4:34 pm

- Now automatically Service status will be moved to completed.

Related **Details**

Service Record Name
ser-010

Owner
 Annapurna SmartBridge

Appointment
[app-016](#)

Quality Check Status

Service Status
Completed

service date
18/11/2024

Created By
 Annapurna SmartBridge, 18/11/2024, 4:32 pm

Last Modified By
 Annapurna SmartBridge, 18/11/2024, 4:34 pm

GARAGE MANAGEMENT SYSTEM

Outputs:

Customer Details:

New Customer Details

* = Required Information

Information	
<p>* Customer Name</p> <input style="width: 100%; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="text"/>	<p>Owner</p> yuva sree netham
Phone number	<input style="width: 100%; border: 1px solid #ccc; padding: 2px;" type="text"/>
Gmail	<input style="width: 100%; border: 1px solid #ccc; padding: 2px;" type="text"/>
* Service Status	<input style="width: 100%; border: 1px solid #ccc; padding: 2px; height: 25px;" type="button" value="--None--"/>
Payment Paid	<input style="width: 100%; border: 1px solid #ccc; padding: 2px;" type="text"/>
Payment Status	<input style="width: 100%; border: 1px solid #ccc; padding: 2px; height: 25px;" type="button" value="--None--"/>
Rating for service Cancel Save & New Save	

Appointment:

New Appointment

* = Required Information

Information		
<p>Customer Details</p> <div style="display: flex; align-items: center; gap: 10px;"> <input style="width: 150px; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="text"/> Search Customer Details... 🔍 </div>	<p>Owner</p> yuva sree netham	
Maintenance service	<input type="checkbox"/>	
Repairs	<input type="checkbox"/>	
Replacement Parts	<input type="checkbox"/>	
* Appointment Date	<input style="width: 100%; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="text"/>	
Service Amount	<input style="width: 100%; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="text"/>	
*Vehicle number plate	<input style="width: 100%; border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;" type="text"/>	
Customer Name Cancel Save & New Save		

GARAGE MANAGEMENT SYSTEM

Service Records:

New Service records

* = Required Information

Information

Service records Name	Owner
<input type="text"/>	 yuva sree netham
Quality Check Status	<input checked="" type="checkbox"/>
Service Status	<input type="text" value="--None--"/>
* Appointment	<input type="text" value="Search Appointments..."/> 🔍

Billing Details and Feedback:

New Billing details and feedback

* = Required Information

Information

Billing details and feedback Name	Owner
<input type="text"/>	 yuva sree netham
* Rating for service	<input type="text"/>
Payment Status	<input type="text" value="--None--"/>
Service records	<input type="text" value="Search Service records..."/> 🔍
* Payment Paid	<input type="text"/>