

PROJECT TITLE

GARAGE MANAGEMENT SYSTEM

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TITLE : GARAGE MANAGEMENT SYSTEM

USING SALESFORCE

Project Overview:

Salesforce is a cloud-based CRM platform that can be customized for a variety of business needs, including garage or service center management. With Salesforce, you can handle customer data, service requests, inventory management, billing, and more, all from a single platform.

Project Objectives

1. **To automate garage operations** – Reduce manual paperwork by digitizing customer, vehicle, and service records.
2. **To manage customer and vehicle details efficiently** – Maintain complete service history for each vehicle.
3. **To streamline appointment booking** – Avoid double bookings and send reminders to customers.
4. **To track service orders accurately** – Record labor, spare parts usage, and service status.
5. **To manage inventory effectively** – Update stock levels automatically and send low-stock alerts.
6. **To generate invoices automatically** – Calculate labor and parts cost, reducing billing errors.
7. **To provide real-time dashboards and reports** – Help managers analyze revenue, service trends, and inventory status.
8. **To implement secure role-based access** – Allow only authorized users (Admin, Mechanic, Receptionist) to perform specific actions.
9. **To improve customer satisfaction** – By ensuring faster service, accurate billing, and timely communication.
10. **To create a scalable cloud-based solution** – That can be extended with new features like online booking, mobile apps, and payment integration.

Student Outcomes

1. **Practical Knowledge in Salesforce CRM**
 - Students gain hands-on experience in creating custom objects, fields, and relationships.
2. **Skill in Business Process Automation**
 - Ability to design Flows, validation rules, and automation for real-world scenarios.
3. **Understanding of Data Modeling**
 - Learned how to design ER diagrams and connect entities like Customer, Vehicle, Service Order, and Invoice.
4. **Experience in Cloud Application Development**
 - Developed a cloud-based solution accessible anytime, anywhere, instead of a traditional local system.
5. **Improved Problem-Solving Skills**
 - Identified challenges in manual garage management and applied digital solutions.
6. **Knowledge of Security and User Roles**
 - Implemented role-based access using Profiles and Permission Sets.
7. **Reporting & Analytics Skills**
 - Created reports and dashboards to analyze garage performance and make data-driven decisions.
8. **Teamwork and Collaboration**
 - Worked as a team to gather requirements, design, build, and test the system.
9. **Presentation & Documentation Skills**
 - Prepared professional project documentation and demonstrated the system effectively.
10. **Career Readiness**

- Acquired skills relevant for Salesforce Admin/Developer roles, increasing job opportunities. **System**

Requirement

- **1. Hardware Requirements**

- **Minimum:**

- Processor: Intel i3 / AMD equivalent
- RAM: 4 GB
- Storage: 250 GB HDD
- Monitor: 1024 × 768 resolution
- Internet Connection: 2 Mbps

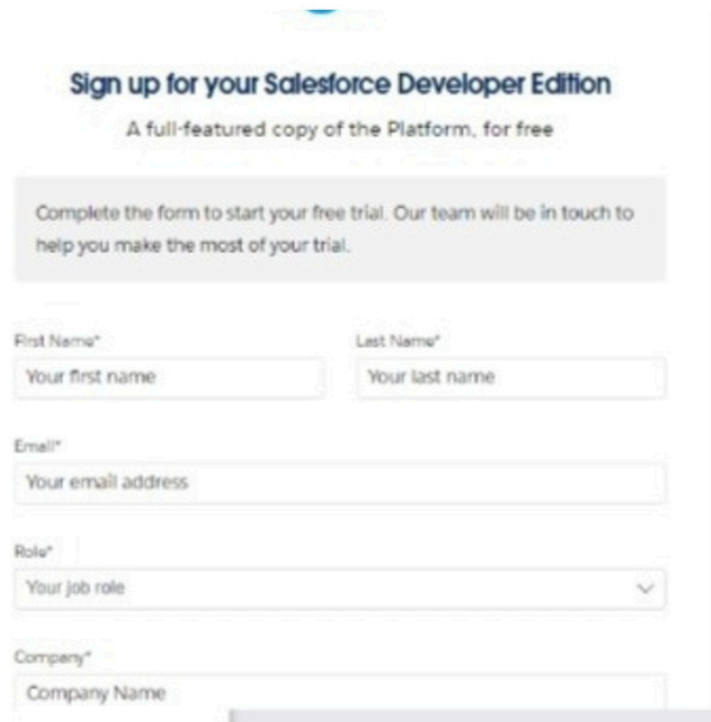
- **Recommended:**

- Processor: Intel i5 or higher

- RAM: 8 GB or higher
- Storage: 500 GB HDD / SSD
- Monitor: Full HD (1920 × 1080)
- Internet Connection: 10 Mbps broadband (stable for Salesforce Cloud access)
-
- **2. Software Requirements**
- **Operating System:** Windows 10 / 11, macOS, or Linux (any modern OS with browser support)
- **Browser:** Google Chrome (latest), Mozilla Firefox, Microsoft Edge, or Safari
- **Salesforce Platform:** Salesforce Developer Edition / Trailhead Playground (free)
- **IDE/Tools (Optional):**
- VS Code with Salesforce Extensions (for Apex/Lightning development)
- Lucidchart / Draw.io (for ER diagrams & DFDs)
- Microsoft Office / Google Docs (for documentation & reports)
-
- **3. User Requirements**
- Basic knowledge of CRM concepts.
- Internet-enabled device (PC / Laptop / Tablet).
- Salesforce Developer Org login credentials.
-
- **4. Non-Functional Requirements**
- **Availability:** System accessible 24×7 (cloud-based).
- **Scalability:** Can support multiple garages and thousands of records.
- **Security:** Role-based access, data protection through Salesforce security model.
- **Performance:** Real-time updates for appointments, inventory, and billing.
- **Usability:** Simple Lightning UI, mobile-friendly

STEP 1: SALESFORCE SETUP

- **Create a Salesforce Developer Organization**
- **Enable the necessary permissions**
- **Set up profiles and users for the project**



The screenshot shows the Salesforce Developer Edition sign-up page. At the top, it says "Sign up for your Salesforce Developer Edition" and "A full-featured copy of the Platform, for free". Below this, a grey box contains the text: "Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial." The form fields are: "First Name*" (with placeholder "Your first name"), "Last Name*" (with placeholder "Your last name"), "Email*" (with placeholder "Your email address"), "Role*" (a dropdown menu with "Your job role" and a downward arrow), and "Company*" (with placeholder "Company Name").

STEP 2: Create Objects

1. Customer Details Object

This object stores customer-related information such as name and contact details. It helps in maintaining customer records for easy access and service reference.

Management

Salesforce

Object

**Create Customer
DetailsObject**Create Appointment
ObjectCreate Service Records
ObjectCreate Billing Details And
Feedback Object

Tabs

Creating A Custom Tab

Create Customer DetailsObject

To create an object:

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

2. Appointment Object

This object is used to record customer appointments with unique auto-generated IDs. It helps in scheduling and tracking customer visits efficiently.

Project

Project Workspace

Management

Salesforce

Object

Create Customer DetailsObject

Create Appointment Object

Create Service Records Object

Create Billing Details And Feedback Object

Tabs

Creating A Custom Tab

Create Appointment Object

To create an object:

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

3. Service Records Object

This object stores details of the services provided to customers. It helps in maintaining a service history for better customer support.

Management

Salesforce

Object

Create Customer
DetailsObjectCreate Appointment
Object**Create Service Records
Object**Create Billing Details And
Feedback Object

Tabs

Creating A Custom Tab

Create Service Records Object

To create an object:

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

4. Billing Details and Feedback Object

This object records billing transactions and customer feedback.

It helps in financial tracking as well as collecting feedback for service improvement



Create Service Records Object

To create an object:

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

STEP 3: CREATING TABS

Creating a Custom Tab

1. A custom tab is created to make custom objects (like Customer Details) easily accessible in the Salesforce app.
2. It allows users to view, add, and manage records of that object directly from the navigation bar.
3. Tabs can be customized with a unique label, style, and profile access settings.
4. It improves usability by linking the custom object with Salesforce apps for quick access.



Garage Management System

+ Salesforce

+ Object

- Tabs

Creating A Custom Tab

Creating Remaining Tabs

+ The Lightning App

+ Fields

+ Validation Rule

+ Duplicate Rule

+ Profiles

Creating A Custom Tab

To create a Tab:(Customer Details)

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



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

STEP 4: CREATING LIGHTNING APP

Creating a Lightning App

1. A Lightning App allows grouping of custom objects, tabs, and utilities into one unified workspace.
2. It provides a user-friendly interface for easy navigation and better productivity.
3. The app can be customized with branding, navigation style, and assigned to specific profiles.

Guided Project
Project Workspace
⌵

+
Salesforce

+
Object

-
Tabs

-
Creating A Custom Tab

-
Creating Remaining Tabs

-
The Lightning App

+
Create A Lightning App

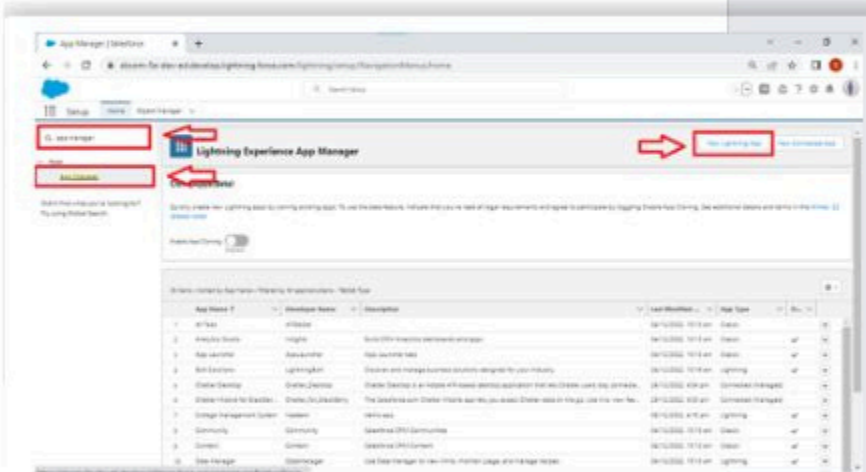
+
Fields

+
Validation Rule

+
Duplicate Rule

+
Profiles

select "app manager" >> click on New Lightning App.



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

STEP 5 : CREATE FIELDS

Creating Fields for the Customer Details Object :

1. Fields are created to store specific information like customer name, phone, and email
2. These fields help in capturing and organizing customer-related data effectively.

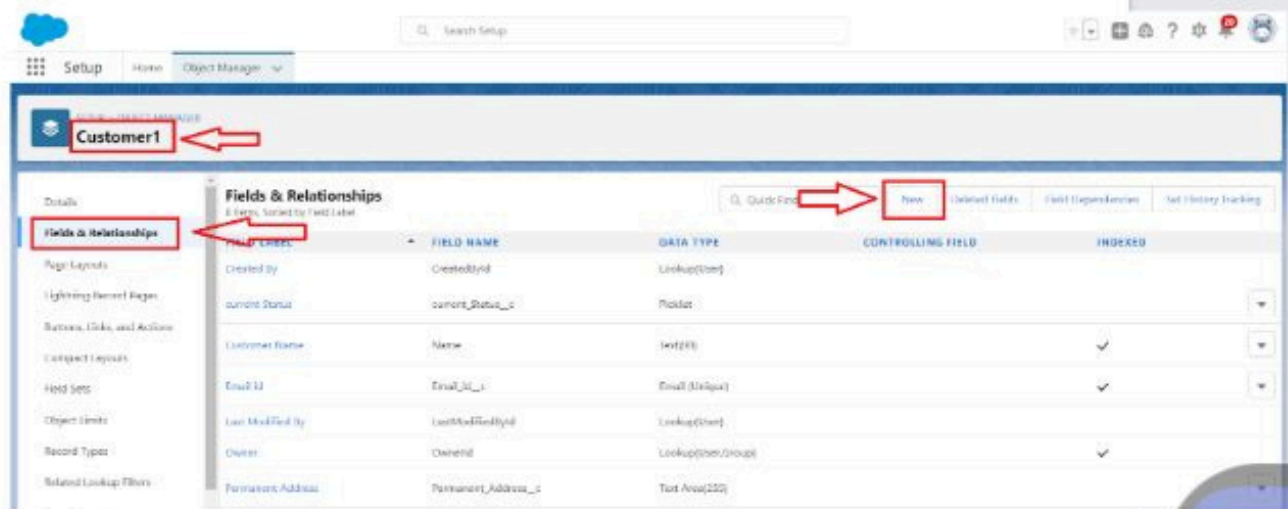
1. To create fields in an object:

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		06/10/2023	✓

2. Now click on "Fields & Relationships" >> New



Customer1

Fields & Relationships

8 Fields, Sorted by Field Label

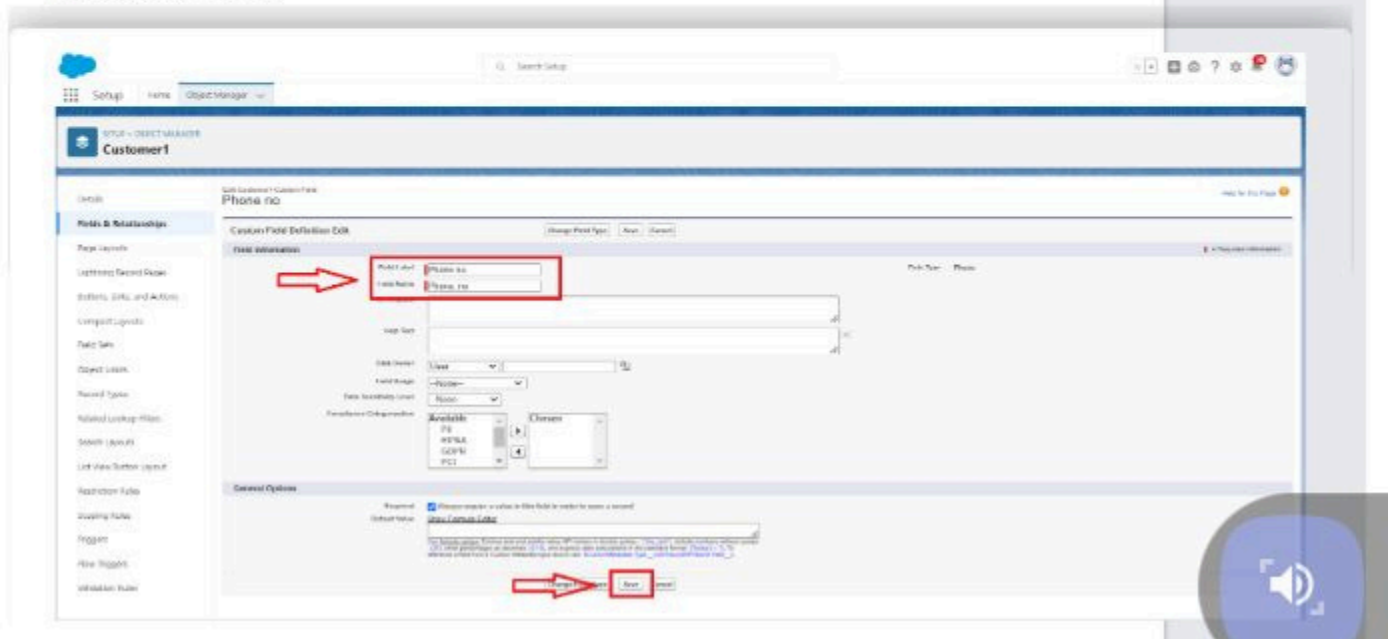
Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Current Status	current_Status__c	Picklist		
Customer Name	Name	Text(255)		✓
Email ID	EmailId__c	Email (16384)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
Permanent Address	Permanent_Address__c	Text Area(16384)		

2. Select Data Type as "Phone"



4. Click on next.

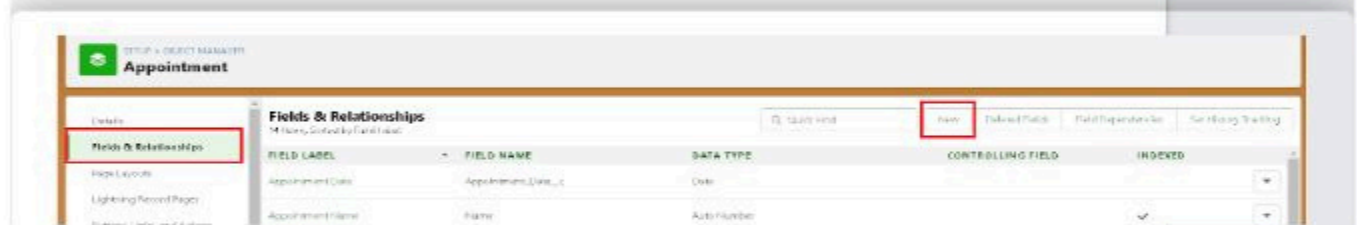


Lookup Fields

1. Lookup fields create a relationship between two objects.
2. They allow linking records, for example, connecting a customer to their appointments.



2. Now click on "Fields & Relationships" >> New



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



Checkbox Fields

1. Checkbox fields are used to capture true/false or yes/no type values.
2. They help in identifying simple status information like "Active Customer".

Appointment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Component Layouts

Field Sets

Object Labels

Record Types

Related Lookup Filters

Search Layouts

ListView Button Layout

Record Rules

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

Data Type

☐ None Selected

Select one of the data types below.

☐ Auto Number

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

☐ Formula

A read-only field that displays its value from a formula expression you define. The formula field is updated when any of the source fields change.

☐ Roll-Up Summary

A read-only field that displays the sum, maximum, or minimum value of a field in a related list or the record count of all records listed in a related list.

☐ Lookup Relationship

Create 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.

☐ Master-Detail Relationship

Create a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create setup dependency fields on the master record to synchronize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.

☐ External Lookup Relationship

Create a relationship that links this object to an external object whose data is stored outside the Salesforce org.

☐ Currency

Allows users to enter a True (checked) or False (unchecked) value.

☐ Percentage

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 expect data to float in another

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

Appointment

New Custom Field

Step 2: Enter the details

Step 2 of 4

Field Label: Maintenance service

Default Value: ☒ Checked ☒ Unchecked

Field Name: Maintenance_service

Description:

Help Text:

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

Previous Next Cancel

Date Fields

1. Date fields store date values like appointment date or service date
2. They are useful for tracking timelines and scheduling.

Appointment

New Custom Field

Step 2: Enter the details

Step 2 of 4

Field Label: Appointment Date

Field Name: Appointment_Date

Description:

Help Text:

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

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

Default Value: Show Formula Editor

Previous Next Cancel

Currency Fields

1. Currency fields store financial values such as billing amounts.
2. They are useful for calculations in invoices and payments.

The screenshot shows the 'New Custom Field' dialog, Step 2 of 4. The 'Field Label' is 'Vehicle number plate'. The 'Length' is set to 10. The 'Field Name' is 'Vehicle_number_plate'. The 'Description' and 'Help Text' fields are empty. The 'Required' checkbox is checked with the label 'Always require a value in this field in order to save a record'. The 'Unique' checkbox is checked with the label 'Do not allow duplicate values'. The 'Treat "ABC" and "abc" as duplicate values (case insensitive)' radio button is selected. The 'Treat "ABC" and "abc" as different values (case sensitive)' radio button is unselected. The 'External ID' checkbox is unchecked with the label 'Set this field as the unique record identifier from an external system'. The 'Auto add to custom report type' checkbox is checked with the label 'Add this field to existing custom report types that contain this entity'.

Text Fields

1. Text fields allow entering names, addresses, or short descriptions.
2. They are used for storing general customer information.

The screenshot shows the 'New Custom Field' dialog, Step 2 of 4. The 'Field Label' is 'Service Status'. The 'Values' section has the 'Use global picklist value set' radio button unselected and the 'Enter values, with each value separated by a new line' radio button selected. The text area contains 'Started' and 'Completed'. The 'Display values alphabetically, not in the order entered' checkbox is unchecked. The 'Use first value as default value' checkbox is unchecked. The 'Restrict picklist to the values defined in the value set' checkbox is checked. The 'Field Name' is 'Service_Status' and the 'Description' field is empty.

Picklist Fields

1. Picklist fields provide predefined options for selection (e.g., Service Type: Repair, Cleaning, etc.).
2. They help in maintaining data consistency and avoid typing errors.

New Custom Field

Step 2 of 4: Enter the details

Field Label: Service Status

Values:

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

Not Started
Completed

☐ Display values alphabetically, not in the order entered

☐ Use first value as default value

☒ Restrict picklist to the values defined in the value set

Field Name: Service_Status

Description:

Formula Fields in Service Records Object

1. Formula fields are used to calculate values dynamically based on other fields.
2. They update automatically (e.g., Total Cost = Quantity × Price)
3. They are read-only and ensure accuracy in service records.

Field Label: **service_date** Field Name: **service_date**

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

Formula Return Type

☐ None Selected

☐ Checkbox

☐ Currency

☒ **Date**

☐ Date/Time

Select one of the data types below:

Calculate a boolean value.
Example: `[TODATE] > CloseDate`

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

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 = BONE] + 1`

5. Insert field formula should be : CreatedDate

Insert Field

Select a field, then click insert. Labels followed by a ">" indicate that there are more fields available.

Service records > Appointment > Appointment > Created By > Created By ID > **Created Date** > Last Activity Date > Last Modified By > Last Modified By ID > Last Modified Date

You have selected
CreatedDate
Type: Date/Time
API Name: CreatedDate

Insert

Close

Step 3: Enter Formula

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] = [Close Date] + 7` More Examples...

Simple Formula **Advanced Formula**

Insert Field

service_date (Date) = **SKED660856**

Insert Operator

Functions
All Function Categories

ABS
ACOS
ARITHMETIC

Quick Tip
• Getting Started
• Operators & Functions

STEP 6 : VALIDATION RULES

Validation Rules

Field Name: **LEASE END DATE** Error Message: **DATE** Action: **WARNING**

Formula: `[LEASE END DATE] < [LEASE START DATE]`

Prevent the submission of blank mandatory fields.

- Ensure that the lease end date is later than the start date.
- Validate the contact details of tenants.
- Prevent the submission of blank mandatory fields.

STEP 7: CREATING DUPLICATE

1.To Create a Matching Rule for Customer Details Object

A matching rule is used to identify duplicate records in Salesforce.

For Customer Details, it compares fields like Name, Email, or Phone.

It helps in finding similar records when new data is entered.

This ensures clean and accurate customer information.

Guided Project

Project Workspace

To Create A Validation Rule To An Billing Details And Feedback Object

Duplicate Rule

To Create A Matching Rule To An Customer Details Object

To Create A Duplicate Rule To An Customer Details Object

Profiles

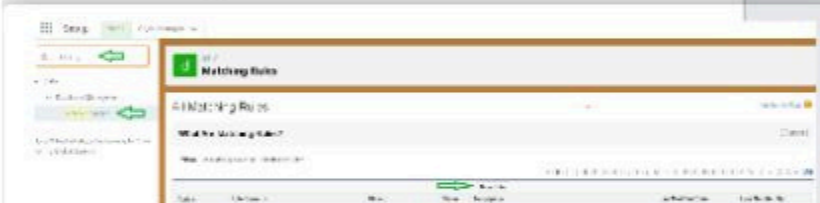
Role & Role Hierarchy

Users

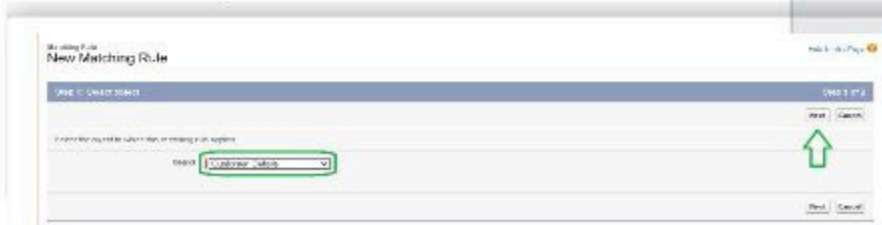
Public Groups

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.



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



4. Give the Rule name : Matching customer details
5. Uncheck suppress duplicates.

2. To create a Duplicate Rule for Customer Details Object

A duplicate rule works with the matching rule to block or allow duplicates.

It prevents users from saving records that match existing customer data.

You can choose to allow, block, or alert users on duplicates.

This keeps the Customer Details Object free from duplicate entries.

To Create A Validation Rule To An Billing Details And Feedback Object

➤ Duplicate Rule

To Create A Matching Rule To An Customer Details Object

To Create A Duplicate Rule To An Customer Details Object

➤ Profiles

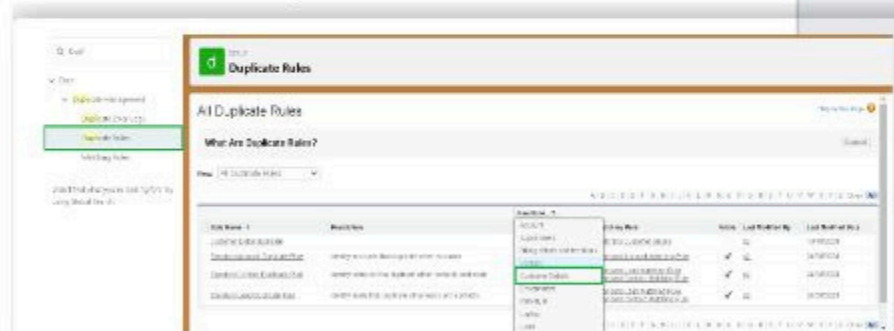
➤ Role & Role Hierarchy

➤ Users

➤ Public Groups

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.



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

STEP 8 : PROFILES

MANAGER PROFILE

The Manager Profile has full access to all objects and records.

They can create, edit, delete, and view customer, service, and billing data.

Managers can run reports, track performance, and monitor team activities.

This profile is designed for higher-level control and decision-making.



To Create A matching
Rule To An Customer
Details Object

To Create A Duplicate
Rule To An Customer
Details Object

Profiles

Manager Profile

Sales Person Profile

Role & Role Hierarchy

Creating Manager Role

Creating Another Roles

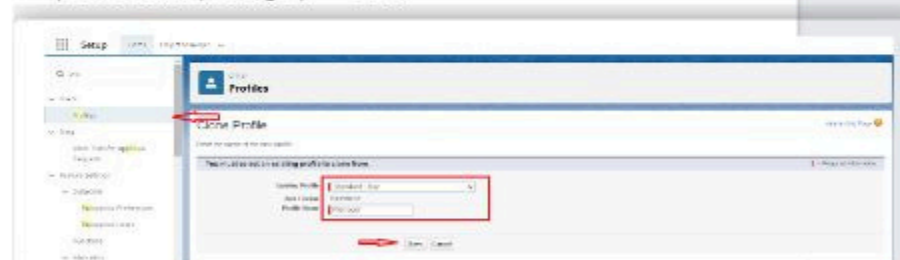
Users

Public Groups

Manager Profile

To create a new profile:

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



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



Sales Person Profile

The Sales Person Profile has limited access compared to managers.

They can create and update customer details, appointments, and service records.

Sales persons can view their assigned data but cannot modify admin settings.

This profile is designed to focus on customer handling and sales activities.

To Create A matching
Rule To An Customer
Details Object

To Create A Duplicate
Rule To An Customer
Details Object

Profiles

Manager Profile

Sales Person Profile

Role & Role Hierarchy

Creating Manager Role

Creating Another Roles

Users

Public Groups

Sales Person Profile

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

Custom Object	View	Create	Edit	Delete	Assign	Transfer
Appointments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Billing details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Feedback	<input checked="" 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 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"/>

5. And click save.

STEP 9 : ROLE AND ROLE HIERARCHY

Creating Manager Role

The Manager Role defines hierarchy access above sales persons.

Managers can view and control records created by their team.

It helps in monitoring customer details, service records, and billing.

This role ensures proper supervision and decision-making authority

Guided Project

Project Workspace

Validation Rule

Duplicate Rule

Profiles

Role & Role Hierarchy

Creating Manager Role

Creating Another Roles

Users

Public Groups

Sharing Setting

Flows

Apex Trigger

Creating Manager Role

Creating Manager Role:

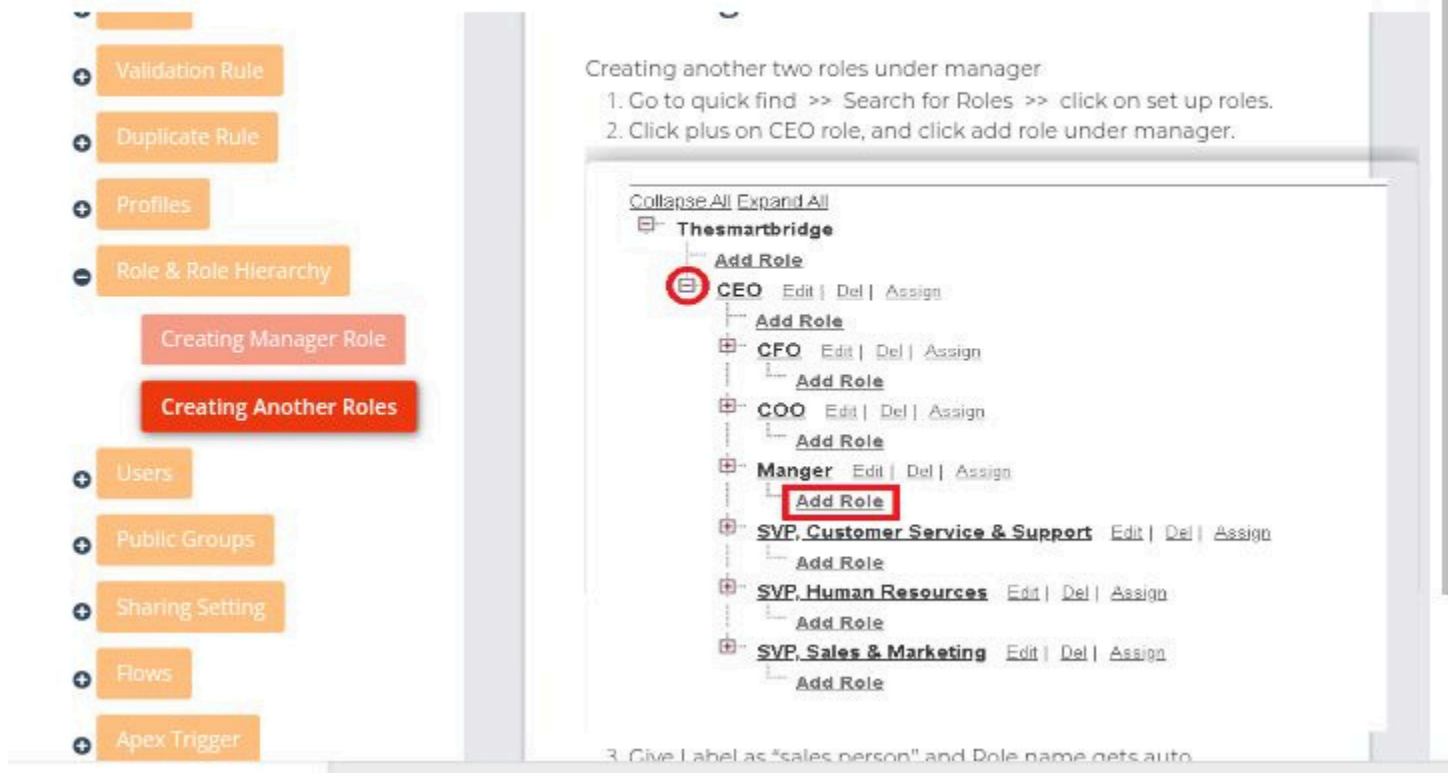
- Go to quick find >> Search for Roles >> click on set up roles.

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

Your Organization's Role Hierarchy

Creating Another Role (Sales Person Role)

The Sales Person Role is created below the manager role in hierarchy.
It allows handling customer details, appointments, and service records.



STEP 10: CREATE USER

Creating a User

A user is created in Salesforce to give login access to the system.

Details like name, email, profile, and role are assigned while creating.

The user can access objects and records based on their profile permissions.

This ensures secure and personalized access for each individual.



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

3. Save.

Creating Another User

Another user can be created for different roles like Sales Person or Manager.

They are given unique credentials and access settings.

This helps in assigning responsibilities according to their job role.

It ensures smooth teamwork and proper data access control.

STEP 11: CREATING PUBLIC GROUPS

A public group is created to combine multiple users, roles, and profiles.


It helps in sharing records and giving common access permissions.

Managers can use groups to assign tasks or share data with many users at once.

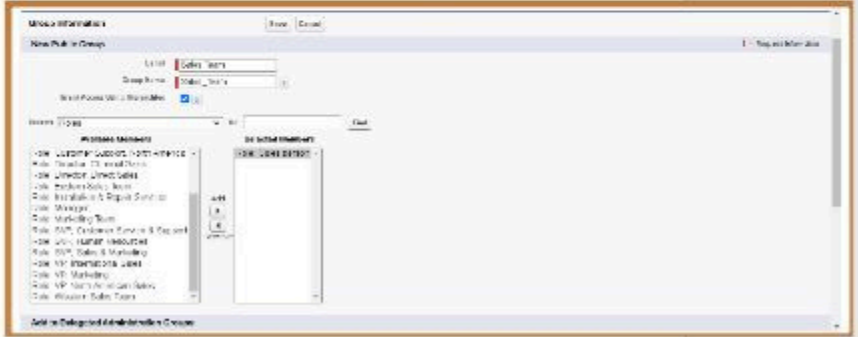
This ensures easier collaboration and controlled record sharing in Salesforce

- Role & Role Hierarchy
 - Creating Manager Role
 - Creating Another Roles
- Users
 - Create User
 - Creating Another Users
- Public Groups
 - Creating New Public Group
- Sharing Setting
- Flows
- Apex Trigger
- Reports
- Dashboards

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



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



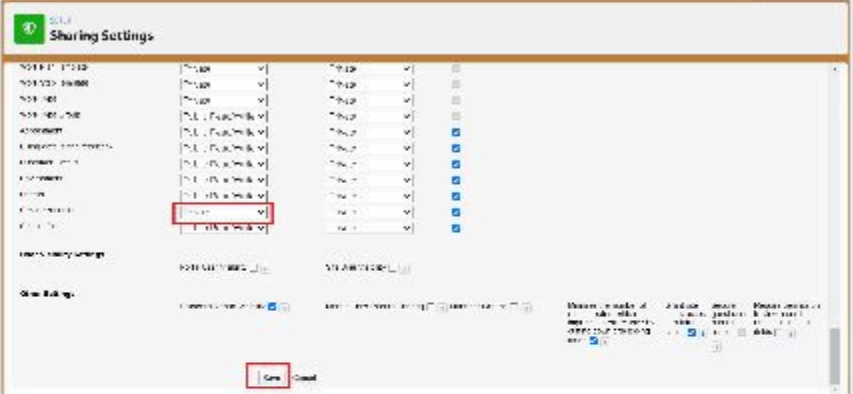
STEP 12 : CREATING SHARING SETTINGS

Creating Sharing Settings


Sharing settings control the visibility of records across users in Salesforce. They define whether data is private, public, or shared with specific roles/groups. Admins can set organization-wide defaults and then add exceptions. This ensures secure access while allowing collaboration when needed.

- Creating Another Roles
- Users
 - Create User
 - Creating Another Users
- Public Groups
 - Creating New Public Group
- Sharing Setting
 - Creating Sharing Settings
- Flows
- Apex Trigger
- Reports
- Dashboards

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.



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



6. Give the Label name as " Sharing setting"
7. Rule name is auto populated.
8. In step 3 : Select which records to be shared, members of " Roles " >> " Sales person"
9. In step 4: share with select " Roles " as " Manager "

STEP 13 : CREATING FLOWS

Creating a Flow

A flow automates business processes like data entry, updates, or approvals.

It is built using Flow Builder with drag-and-drop elements.

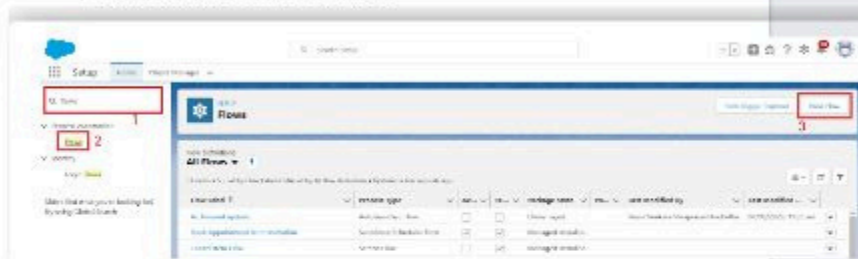
Flows reduce manual work by performing actions automatically.

They ensure accuracy and save time in managing security

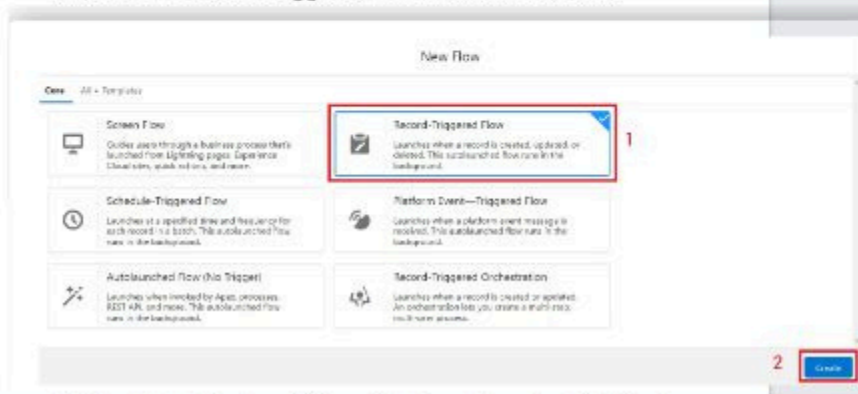
- Validation Rule
- Duplicate Rule
- Profiles
- Role & Role Hierarchy
- Users
- Public Groups
- Sharing Setting
- Flows
- Create A Flow**
- Create Another Flow
- Apex Trigger
- Reports
- Dashboards

Create A Flow

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



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



STEP 14: APEX TRIGGER

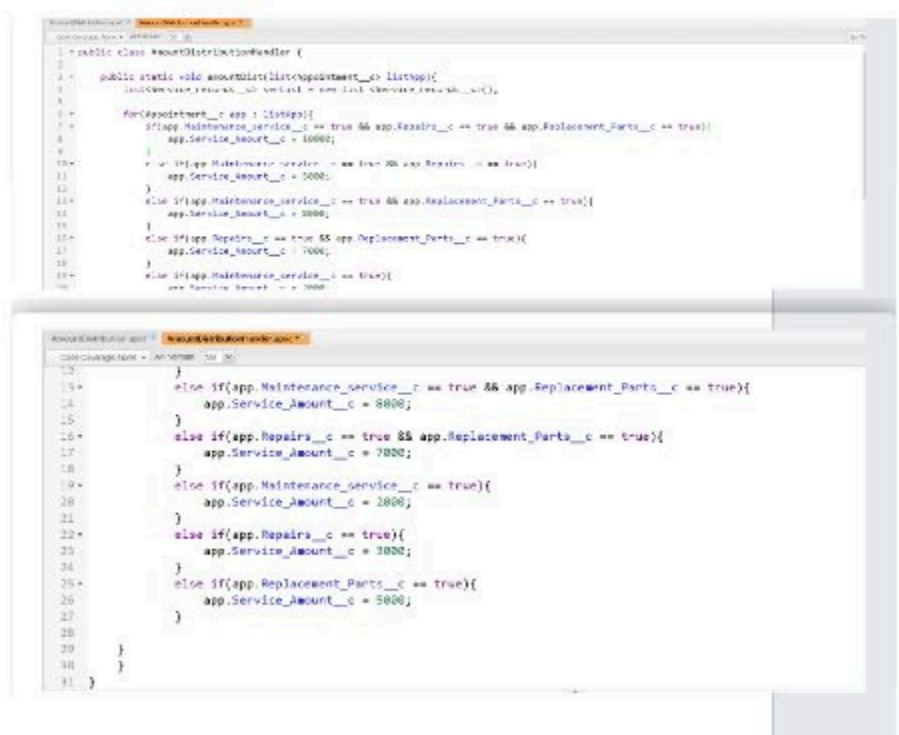
Apex handler:

An Apex Handler is a class used to manage the logic of Apex Triggers.

It keeps the trigger code clean by separating logic into a handler class.

This improves reusability, readability, and easier maintenance of code.

Handlers support best practices by avoiding complex logic directly in triggers.



STEP 15 : REPORTS

Create a Report Folder

A report folder is created to organize reports in Salesforce.

It helps in grouping related reports for easy access.

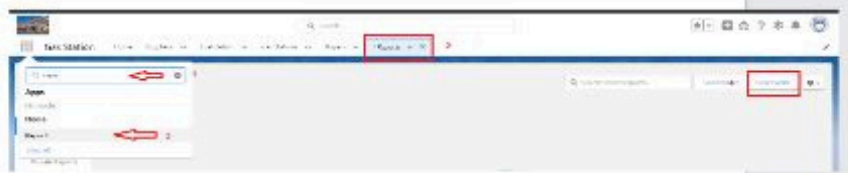
Folders can be private or shared with specific users.

This ensures structured storage and secure access to reports.



Create A Report Folder

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



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



Sharing a Report Folder

Report folders can be shared with users, roles, or public groups.

Sharing allows others to view, edit, or manage reports inside the folder.

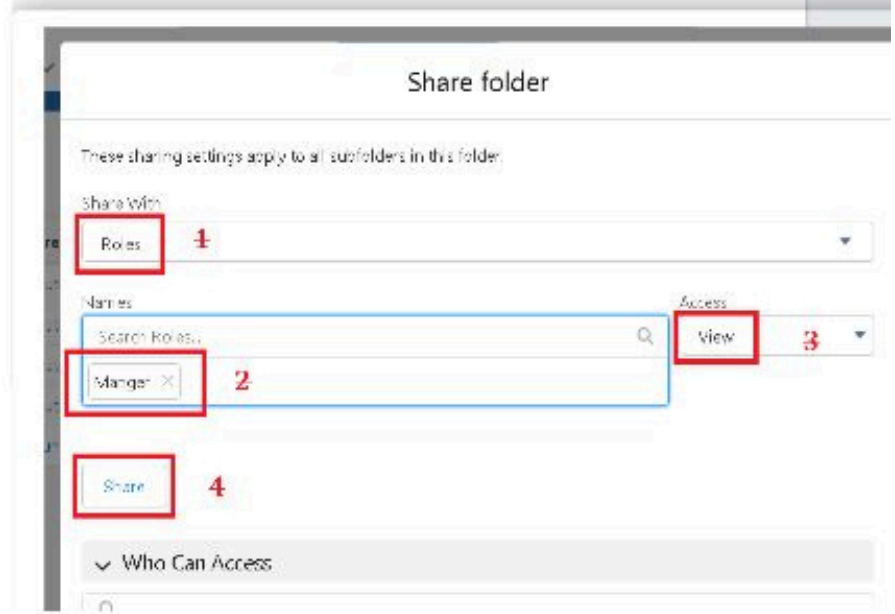
Access levels like Viewer, Editor, or Manager can be assigned.

This improves collaboration while maintaining data security.



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.



Create Report Type

A report type defines which objects and fields are available in a report.

It acts as a template for building customized reports.

Admins can create custom report types to meet business needs.

This ensures flexibility in analyzing specific data.

- + Users
- + Public Groups
- + Sharing Setting
- + Flows
- Apex Trigger
- Apex Handler
- Reports
 - Create A Report Folder
 - Sharing A Report Folder
 - Create Report Type
 - Create Report
- + Dashboards
- + User Adoption

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

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

Create Report

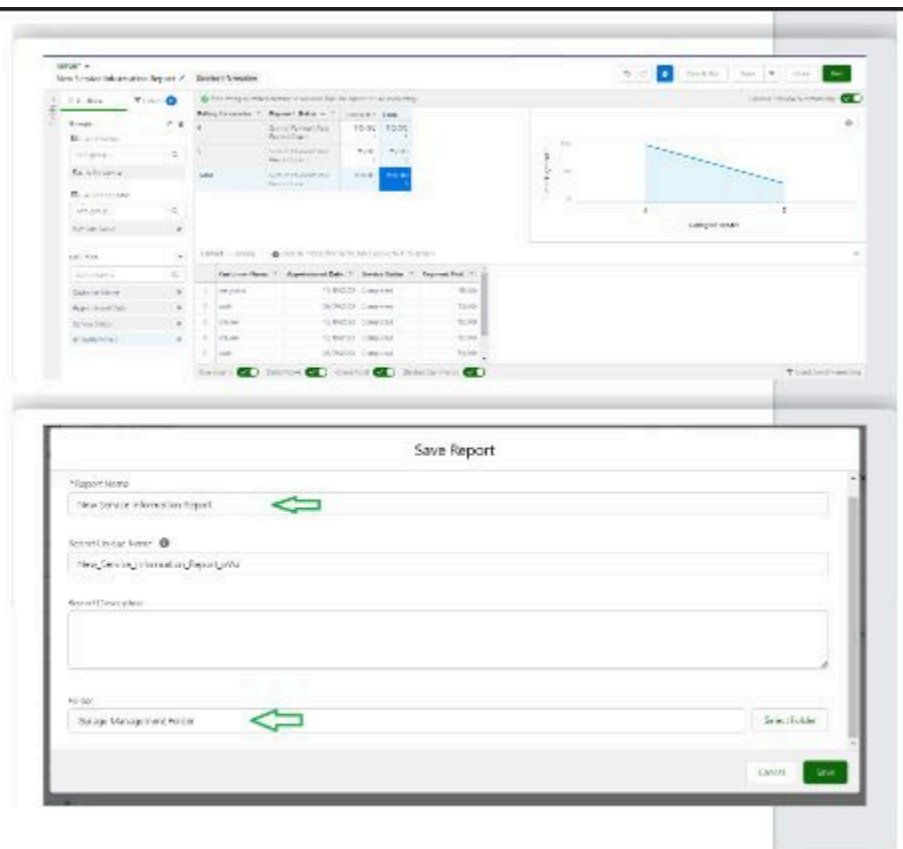
A report is created to analyze and present Salesforce data.

Users can filter, group, and summarize records in different formats.

Reports help in tracking performance, sales, and customer activity.

They provide insights for better decision-making.

- + Users
- + Public Groups
- + Sharing Setting
- + Flows
- Apex Trigger
 - Apex Handler
- Reports
 - Create A Report Folder
 - Sharing A Report Folder
 - Create Report Type
 - Create Report
- + Dashboards
- + User Adoption



STEP 16: DASHBOARD

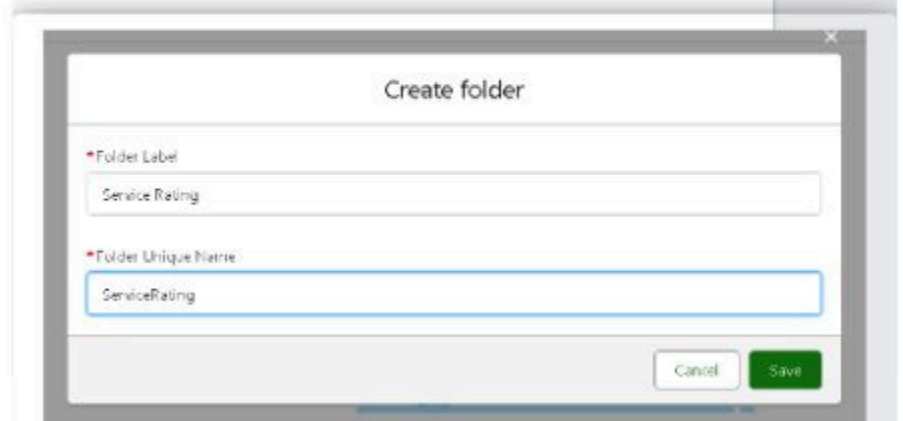
Create Dashboard Folder

A dashboard folder is created to store and organize dashboards securely.

- + Flows
- Apex Trigger
 - Apex Handler
- Reports
 - Create A Report Folder
 - Sharing A Report Folder
 - Create Report Type
 - Create Report
- Dashboards
 - Create Dashboard Folder
 - Create Dashboard
- + User Adoption

Create Dashboard Folder

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



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

Create Dashboard

A dashboard visually represents report data using charts and graphs.

Create Dashboard

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

New Dashboard

* Name
Customer review

Description

Folder
Service Rating

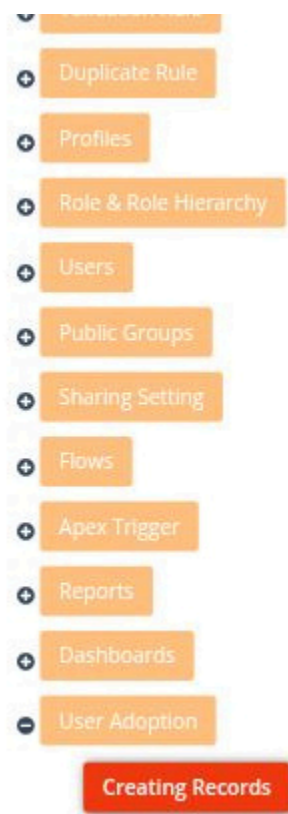
Select Folder

Cancel Create

3. Select add component.

STEP 17: USER ADOPTION

1. Users are encouraged to actively create records like customers, appointments, and services.
2. This ensures real-time data entry and accuracy in the system
3. More record creation by users shows higher adoption and effective system usage.



Creating Records

To create a record in the follow objects follow these steps

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

Now, Create the Appointment Record

CONCLUSION

The Garage Management System in Salesforce provides an efficient way to manage customers, appointments, services, and billing. With features like custom objects, roles, profiles, automation (flows, triggers), and reports, it ensures smooth operations. It improves data accuracy, enhances customer satisfaction, and supports decision-making through insights. Overall, the system streamlines garage activities and helps achieve better productivity and service quality.

