

# GARAGE MANAGEMENT SYSTEM

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# GARAGE MANAGEMENT SYSTEM

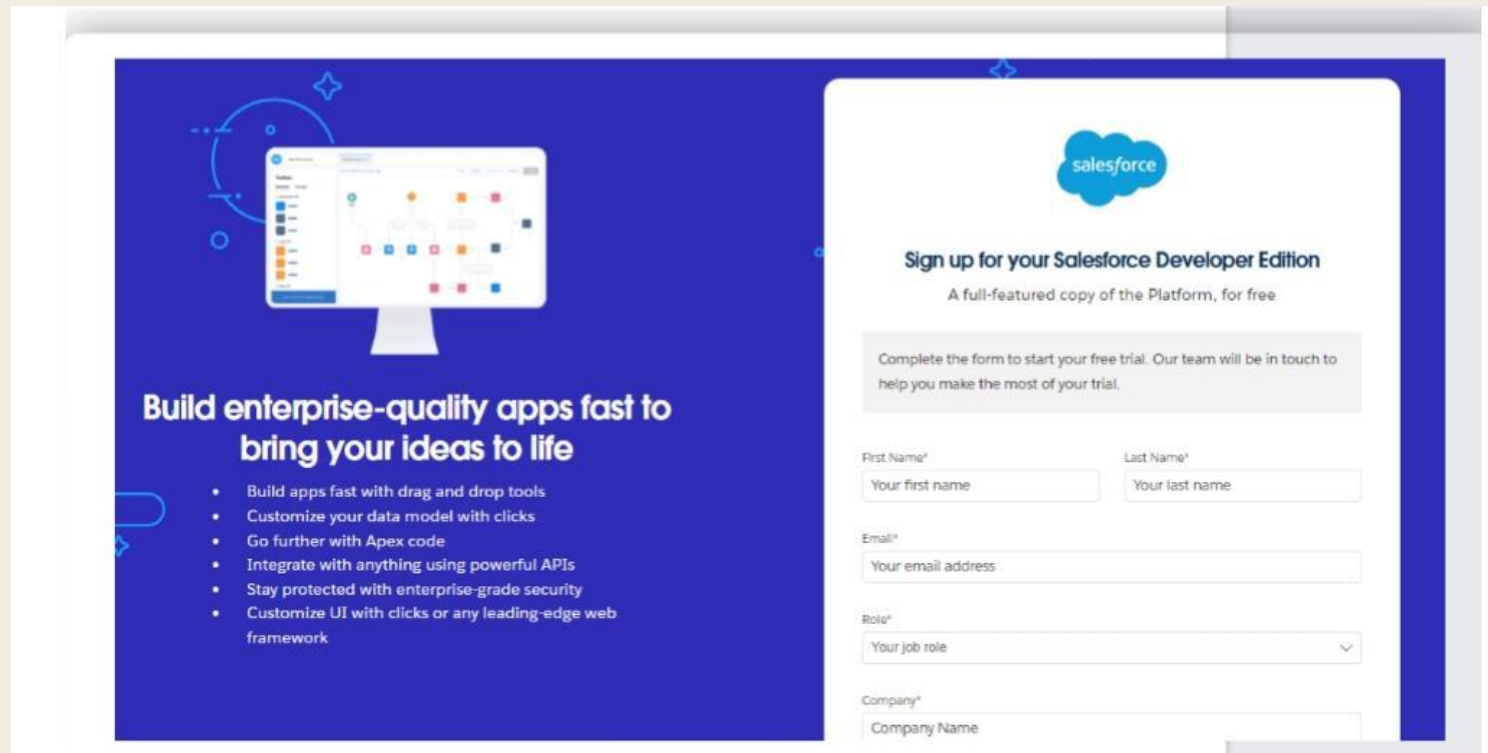
## INTRODUCTION

- Garage Management in SalesforceGarage management in Salesforce refers to the process of managing and tracking vehicle maintenance, repairs, and other services within a garage or automotive service center.
- Salesforce can be customized to meet the specific needs of a garage management

# 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.

# CREATING DEVELOPER ACCOUNT:



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

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

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

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

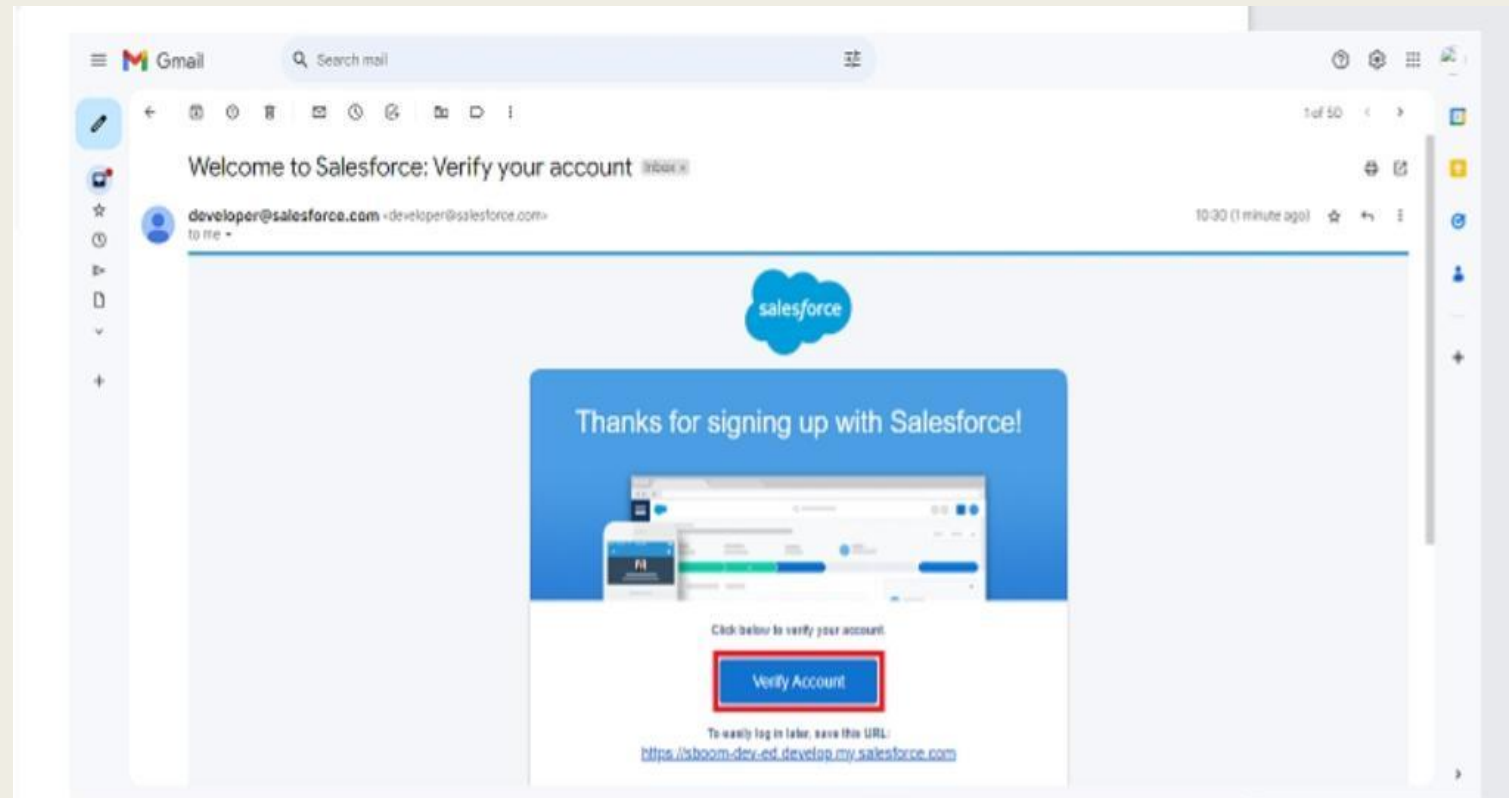
First Name\*  Last Name\*

Email\*

Role\*

Company\*

# ACCOUNT ACTIVATION



## Change Your Password

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

- 8 characters
- 1 letter
- 1 number

\* New Password

.....Good

\* Confirm New Password

.....Match


Security Question








▼ In what city were you born?

\* Answer

asdfghikl

Change Password





Setup

Home

Object Manager

Quick Find

Setup Home

Service Setup Assistant

Multi-Factor Authentication Assistant

Release Updates

Lightning Experience Transition Assistant

Salesforce Mobile App

Lightning Usage

Optimizer


ADMINISTRATION

Users

SETUP

Home


Create



### Get Started with Einstein Bots

Launch an AI-powered bot to automate your digital connections.


Get Started



### Mobile Publisher

Use the Mobile Publisher to create your own branded mobile app.

Learn More



### Real-time Collaborative Docs

Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce.

Get Started

# OBJECT

- Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects
- Salesforce objects are of two types:
- **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- **Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

# TABS

- A tab is like a user interface that is used to build records for objects and to view the records in the objects.

## **Types of Tabs:**

### **1. Custom Tabs**

**Custom object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.**

### **2. Web Tabs**

**Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window.**



### **3. Visualforce Tabs**

**Visualforce Tabs are custom tabs that display a Visualforce page. Visualforce tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.**

### **4. Lightning Component Tabs**

**Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.**

### **5. Lightning Page Tabs**

**Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu.**

**Lightning Page tabs don't work like other custom tabs.**

# Creating A Custom Tab

The screenshot shows the Salesforce Setup interface for Custom Tabs. Red boxes and arrows highlight key navigation elements: the 'Setup' menu, the 'Custom Tabs' link in the left sidebar, the 'Add Custom Tab' button, and the 'Add' button in the table header.

**Custom Tabs**

You can create new custom tabs to extend Salesforce functionality or to build new application functionality.

Custom Object tabs look and behave like the standard tabs provided with Salesforce. These tabs allow you to embed external web applications and content within the Salesforce window. Visualforce tabs allow you to embed Visualforce pages. Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app. Lightning Page tabs allow you to add Lightning Pages to Lightning Experience and the mobile app.

Active	Label	Tab Style	Description
On	ACCOUNT	Classic	created to setup with student activity/understand
On	ADDRESS	Apprentice	
On	CERAMICS	Lightning page	
On	CUSTOMER	Apprentice	This tab is related to Hotel Reservation App
On	SALES	Apprentice	
On	MARKS	Phone	This tab is related to College Management System
On	CORE_COURSE	Classic	
On	GROUPS	Classic	
On	CHURCHES	Classic	
On	STUDENTS	Classic	
On	CLASSROOMS	Highway Sign	This tab is related to Hotel Reservation App
On	ROADS	Highway Sign	This tab is related to Hotel Reservation App
On	ROADS	Apprentice	
On	ROADS	Apprentice	

## New Custom Object Tab

Help for this Page

### Step 1: Enter the Details

Step 1 of 3

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

Select an existing custom object or create a new custom object now.

Object:

Tab Style:

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

Splash Page Custom Link:

Enter a short description.

Description:

Next Cancel

## Tab Style Selector

Create your own style

Hide styles which are used on other tabs




Save

Cancel

### Step 3: Add to Custom Apps

Step 3 of 3

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

Custom App	 <input type="checkbox"/> Include Tab
Platform (standard__Platform)	<input type="checkbox"/>
Sales (standard__Sales)	<input type="checkbox"/>
Service (standard__Service)	<input type="checkbox"/>
Marketing (standard__Marketing)	<input type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>

Analytics Studio (standard__Insights)	<input type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input type="checkbox"/>
Service Console (standard__LightningService)	<input type="checkbox"/>
Sales (standard__LightningSales)	<input type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input type="checkbox"/>
Queue Management (standard__QueueManagement)	<input type="checkbox"/>
Bolt Solutions (standard__LightningBolt)	<input type="checkbox"/>
Data Manager (standard__DataManager)	<input type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>

☒ Append tab to users' existing personal customizations



# THE LIGHTNING APP

**\*An app is a collection of items that work together to serve a particular function.**

**\*In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.**

**\*Lightning apps let you brand your apps with a custom colour and logo. You can even include a utility bar and Lightning page tabs in your Lightning app.**

# CREATE A LIGHTNING APP

The screenshot shows the Salesforce App Manager interface. Red annotations highlight key features: a search bar labeled 'app manager', a 'Beta' badge, a 'Clone App (Beta)' button, and a 'New Lightning App' button. A table below lists various apps available for cloning.

App Name	Developer Name	Description	Last Modified	App Type	Vis.
1. Kit Tabs	KitApps		04/12/2022, 10:10 am	Classic	
2. Analytics Studio	Insights	Build CRM Analytics dashboards and apps	04/12/2022, 10:10 am	Classic	✓
3. App Launcher	AppLauncher	App Launcher tabs	04/12/2022, 10:10 am	Classic	✓
4. Best Solutions	LightningBot	Discover and manage business solutions designed for your industry	04/12/2022, 10:10 am	Lightning	✓
5. Chatter Desktop	Chatter/Desktop	Chatter Desktop is an Adobe AEM-based desktop application that lets Chatter users stay connected...	28/12/2022, 4:04 pm	Connected (Managed)	
6. Chatter Mobile for Standard...	Chatter/Mobile	The Salesforce.com Chatter Mobile app lets you access Chatter data on the go. Use it to view fe...	28/12/2022, 4:05 pm	Connected (Managed)	
7. College Management System	Hasseem	demo app	06/12/2022, 4:16 pm	Lightning	✓
8. Community	Community	Salesforce CRM Communities	04/12/2022, 10:10 am	Classic	✓
9. Content	Salesforce CRM Content		04/12/2022, 10:10 am	Classic	✓
10. Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes	04/12/2022, 10:10 am	Lightning	✓

New Lightning App

### App Details & Branding

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

App Details

\*App Name

Name your app.

\*Developer Name

Enter a developer name.

Description

Enter a description.

App Branding

Image

Primary Color Hex Value

#0070C2

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

Next

### 3. To Add Navigation Items:

New Lightning App

### Navigation Items

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

Available Items

Search

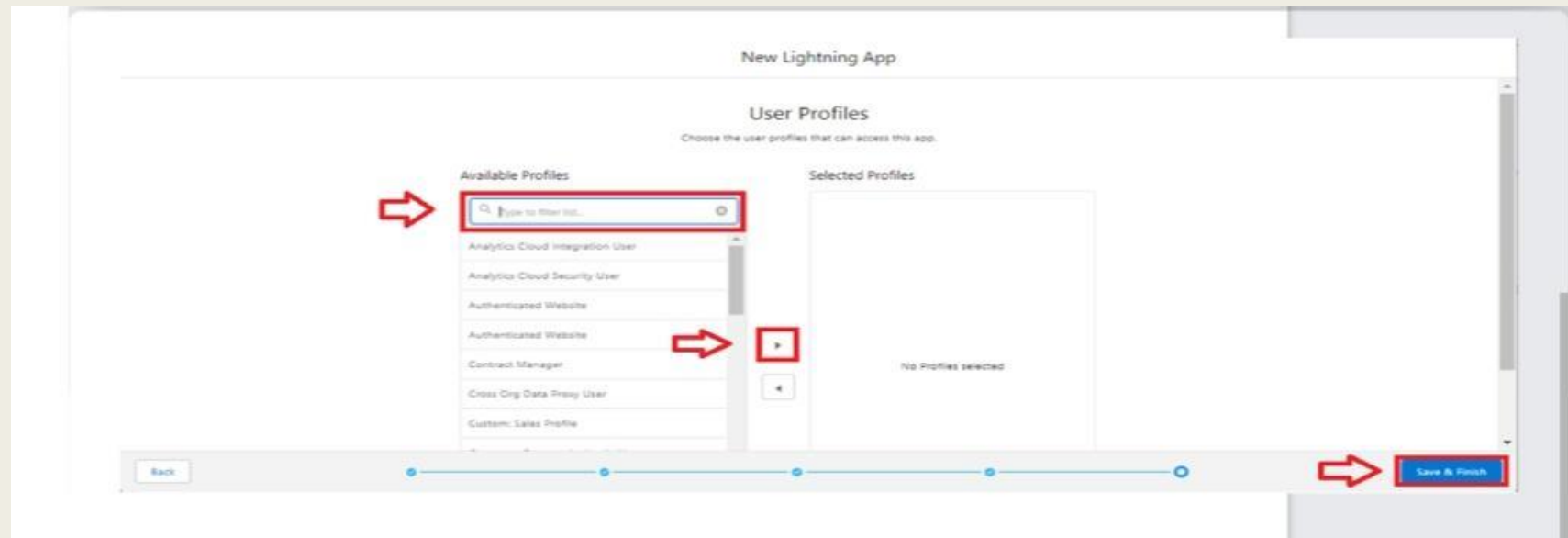
Type in item list.

- Accounts
- Activities
- Alert Settings
- My Files
- Alternative Payment Methods
- App Launcher
- Appointment Notifications

Selected Items

No items selected

Next





# FIELDS

- When we talk about Salesforce, Fields represent the data stored in the columns of a relational database.
- It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

## Types of Fields

1. Standard Fields

2. Custom Fields

## STANDARD FIELDS:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task.

- The main point is that you can't simply delete a Standard Field until it is a non-required standard field.
- Moreover, we have some fields that you will find common in every Salesforce application.

They are,

- \* Created By
- \* Owner
- \* Last Modified
- \* Field Made During object Creation

## CUSTOM FIELDS:

- On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements.
- Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

# CREATION OF FIELDS FOR THE CUSTOMER DETAILS OBJECT

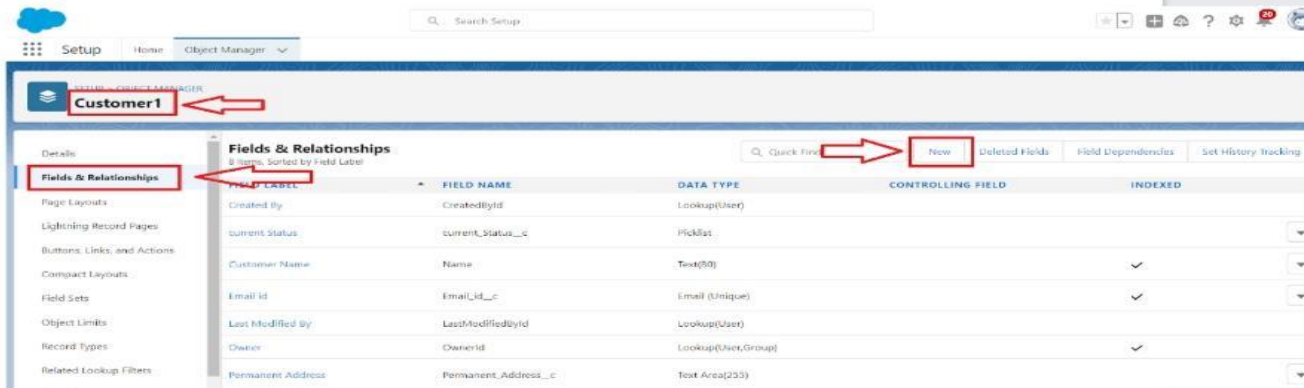
## 1. To create fields in an object:

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		06/13/2023	✓

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



Field Label	Field Name	Data Type	Controlling Field	Indexed
Created By	CreatedById	Lookup(User)		
Current Status	Current_Status__c	Picklist		
Customer Name	Name	Text(50)		✓
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)		



# CREATION OF LOOKUP FIELDS

Setup Home Object Manager

Object Manager

14 Items, Sorted by Label

Label	API Name	Type	Description	Last Modified	Deployed
Appointment	Appointment__c	Custom Object		24/09/2022	✓
Appointment Category	AppointmentCategory	Standard Object			
Appointment Institution	AppointmentInstitution	Standard Object			
Appointment Institute	AppointmentInstitute	Standard Object			

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

Setup > OBJECT MANAGER Appointment

Fields & Relationships

14 Items, Sorted by Field Label

Field Label	Field Name	Data Type	Controlling Field	Indexed
Appointment Date	Appointment__Date__c	Date		
Appointment Name	Appointment__Name__c	Auto Number		✓

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

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 derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

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

☒ Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

☐ Master-Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.

Next Cancel

## Lookup Filter

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

▼ Hide Filter Settings

Filter Criteria

[Insert Suggested Criteria](#)

[Clear Filter Criteria](#)

Field	Operator	Value / Field	
Appointment: Appointment Date	less than	Field Appointment: Created Date	<a href="#">Clear</a>
Begin typing to search for a field...	None	Value	<a href="#">Clear</a>

[Add filter logic...](#)

Filter Type

☒ **Required.** The user-entered value must match filter criteria.

[If it doesn't, display this error message on save:](#)

Value does not exist or does not match filter criteria

[Reset to default message](#)

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

Lookup Window Text

Add this informational message to the lookup window

Active

☒ **Enable this filter.**

[Change Field type](#)

[Save](#)

[Cancel](#)

# CREATION OF CHECK BOX FIELDS

SETUP > OBJECT MANAGER  
**Appointment**

Details  
**Fields & Relationships**  
Page Layouts  
Lightning Record Pages  
Buttons, Links, and Actions  
Compact Layouts  
Field Sets  
Object Users  
Record Types  
Related Lookup Filters  
Search Layouts  
List View Button Layout  
Restriction Rules

Specify the type of information that the custom field will contain

**Data Type**

Select one of the data types below

- ☐ None Selected
- ☐ Auto Number
- ☐ Formula
- ☐ Roll-Up Summary
- ☐ Lookup Relationship
- ☐ Master-Detail Relationship
- ☒ **Checkbox**
- ☐ External Lookup Relationship
- ☐ Currency

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

Next

Appointment  
**New Custom Field**

Help for this Page

Step 2 of 4

Step 2: Enter the details

Previous Next Cancel

Field Label Maintenance service

Default Value ☐ Checked ☒ Unchecked

Field Name Maintenance\_service

Description

Help Text

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

Previous Next Cancel

# CREATION OF DATE FIELDS

Appointment  
New Custom Field

Help for this Page

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label Appointment Date

Field Name Appointment\_Date

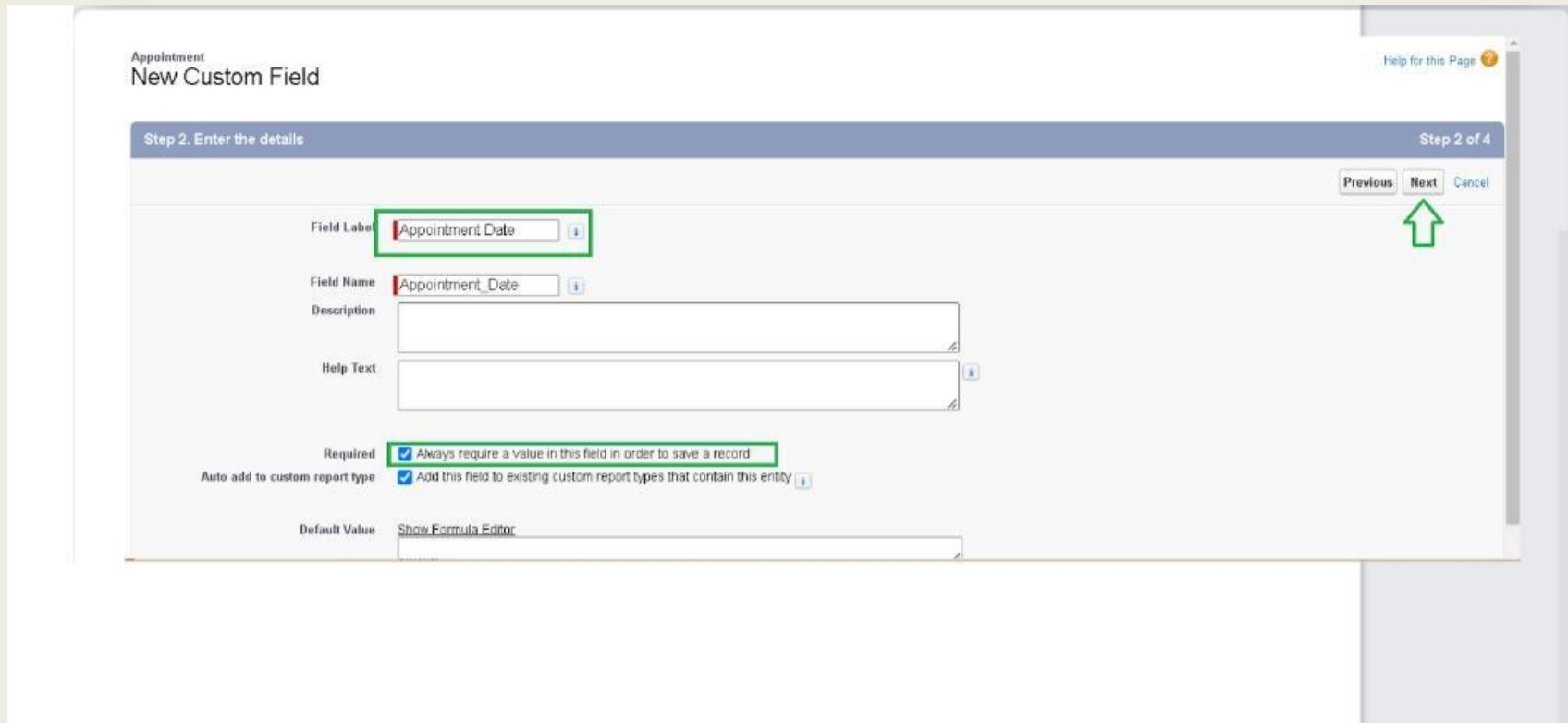
Description

Help Text

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

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

Default Value Show Formula Editor





# CREATION OF CURRENCY FIELDS

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label

Please enter the length of the number and the number of decimal places. For example, a number with a length of 6 and 2 decimal places can accept values up to \*12345678.90\*

Length  Decimal Places   
Number of digits to the left of the decimal point. Number of digits to the right of the decimal point.

Field Name

Description

Help Text

Required ☐ Always require a value in this field in order to save a record.  
Auto add to custom report type ☒ Add this field to existing custom report types that contain this entity.

Appointment  
New Custom Field

Help for this Page

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

Previous Next Cancel

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

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

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

# CREATION OF TEXT FIELDS

The screenshot shows a software interface for creating a text field, titled "Step 2. Enter the details" in the top left corner. In the top right corner, it says "Step 2 of 4" and includes "Previous", "Next", and "Cancel" buttons. The form contains the following fields and options:

- Field Label:** A text input field containing "Vehicle number plate" with a dropdown arrow icon.
- Length:** A text input field containing "10". Above it is the instruction: "Please enter the maximum length for a text field below."
- Field Name:** A text input field containing "vehicle\_number\_plate" with a dropdown arrow icon.
- Description:** A large empty text area with a small icon in the bottom right corner.
- Help Text:** A large empty text area with a small icon in the bottom right corner.
- Required:** A checkbox labeled "Required" which is checked, with the text "Always require a value in this field in order to save a record".
- Unique:** A checkbox labeled "Unique" which is checked, with the text "Do not allow duplicate values". Below this are two radio button options:
  - ☒ Treat "ABC" and "abc" as duplicate values (case insensitive)
  - ☐ Treat "ABC" and "abc" as different values (case sensitive)
- External ID:** A checkbox labeled "External ID" which is unchecked, with the text "Set this field as the unique record identifier from an external system".
- Auto add to custom report type:** A checkbox which is checked, with the text "Add this field to existing custom report types that contain this entity".

# CREATION OF PICKLIST FIELDS

**New Custom Field**

Step 2: Enter the details Step 2 of 4

[Previous](#) [Next](#) [Cancel](#)

Field Label

Values

☐ Use global picklist value set

☒ Enter values, with each value separated by a new line

☐ 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

Description

# CREATING FORMULA FIELD IN SERVICE RECORDS OBJECT

Step 2: Choose output type Step 2 of 5

Previous Next Cancel

Field Label  Field Name

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

**Formula Return Type**

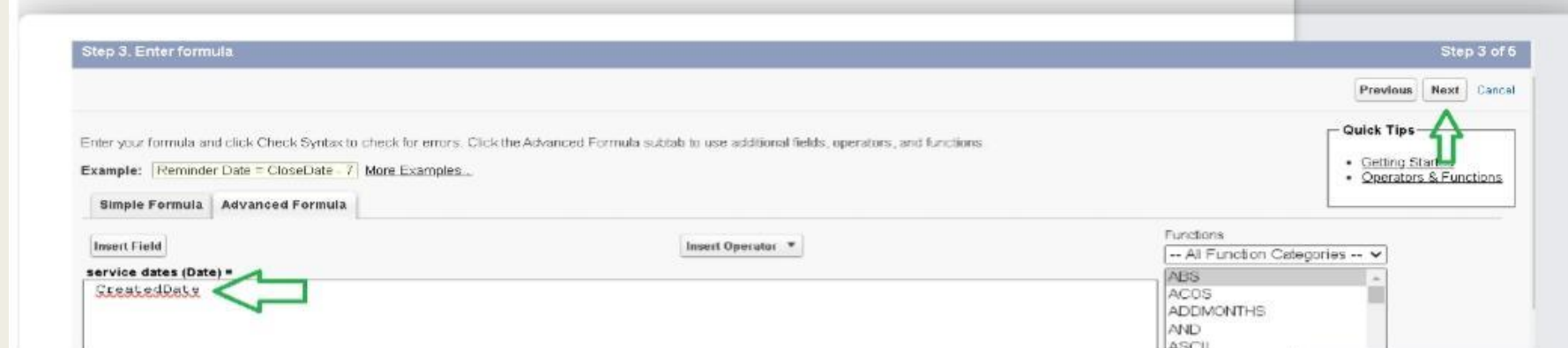
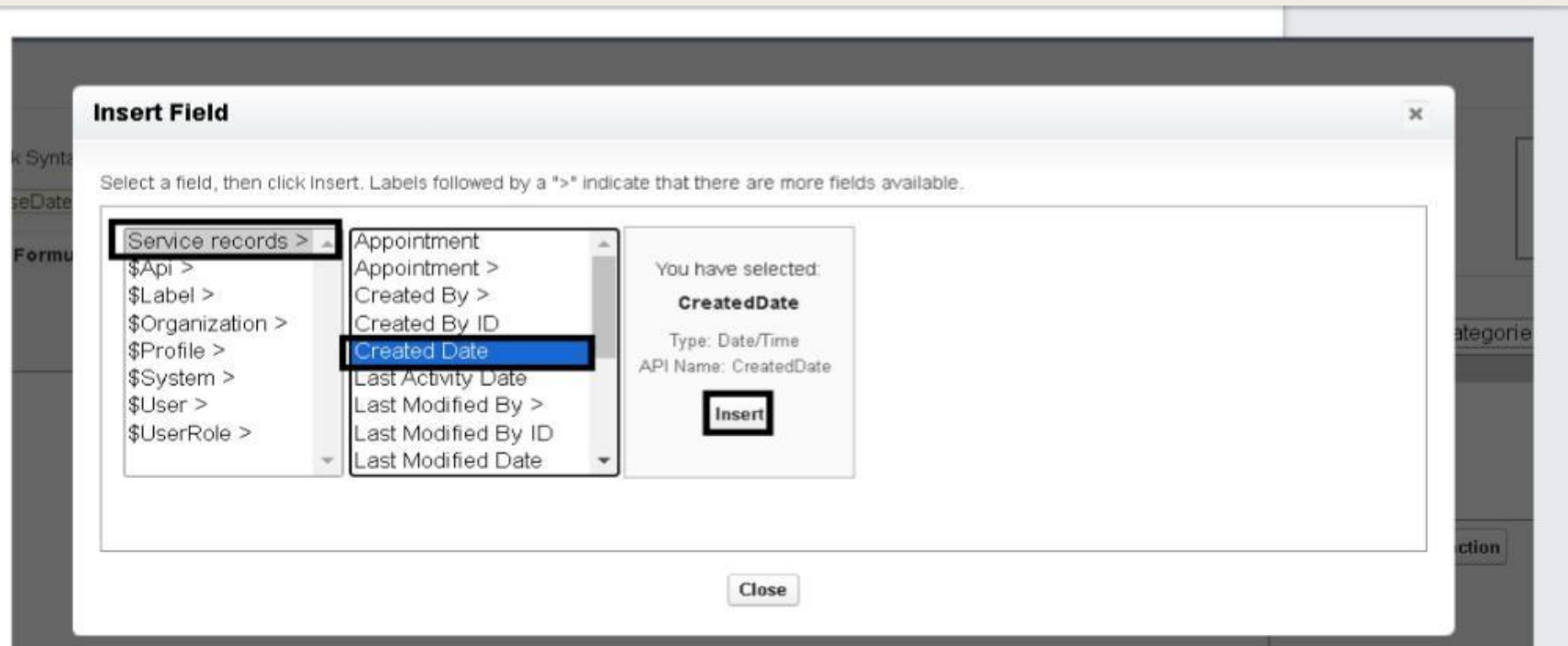
☐ None Selected Select one of the data types below.

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

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

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

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



# VALIDATION RULE

**Validation rules are applied when a user tries to save a record and are used to check if the data meets specified criteria.**

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

Validation Rule Edit

Save

Save & New

Cancel

Rule Name

rating\_should\_be\_less\_than\_5

Active

☒

Description

Quick Tips

- [Operators & Functions](#)

Error Condition Formula

The screenshot shows the 'Error Message' configuration interface. The 'Error Condition' field is populated with the formula: `NOT ( ISBLANK ( Rating_for_service_c , "[1-5]{1}" ) )`. The 'Error Message' field contains the text: `rating should be from 1 to 5`. A dropdown menu on the right lists various functions: `ACOS`, `ADDMONTHS`, `AND`, `ASCII`, and `ASIN`. Below the list, there is a section for the 'Insert Selected Function' with a description for the `ABS(number)` function.

# DUPLICATE RULE

## TO CREATE A DUPLICATE RULE TO AN CUSTOMER DETAILS OBJECT

The screenshot displays the Salesforce Duplicate Rules setup interface. On the left, the navigation sidebar includes a search bar and a menu with 'Duplicate Management' expanded, showing 'Duplicate Error Logs', 'Duplicate Rules' (highlighted), and 'Matching Rules'. The main content area is titled 'Duplicate Rules' and shows 'All Duplicate Rules'. Below this, there's a section 'What Are Duplicate Rules?' with an 'Expand' link. A 'View' dropdown is set to 'All Duplicate Rules'. A table lists existing rules, and a 'New Rule' dropdown menu is open, showing 'Customer Details' as the selected object.

Rule Name	Description	Matching Rule	Action	Last Modified By	Last Modified Date
Customer Detail Duplicate		Match Customer details	<input type="checkbox"/>	ed	10/10/2023
Standard Account Duplicate Rule	Identify accounts that duplicate other accounts.	Account Amount Matching Rule	<input checked="" type="checkbox"/>	ed	24/08/2023
Standard Contact Duplicate Rule	Identify contacts that duplicate other contacts and leads.	Identify Lead Matching Rule	<input checked="" type="checkbox"/>	ed	24/08/2023
Standard Lead Duplicate Rule	Identify leads that duplicate other leads and contacts.	Identify Contact Matching Rule	<input checked="" type="checkbox"/>	ed	24/08/2023

## Duplicate Rule Edit

Save

Save &amp; New

Cancel

## Rule Details

! = Required Information

Rule Name Customer Detail duplicat

Description

Object Customer Details

Record-Level Security

☒ Enforce sharing rules☐ Bypass sharing rules

## Actions

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

Action On Create

☐ Allow ☒ Alert ☐ Report

Action On Edit

☐ Allow ☐ Alert ☐ Report

Alert Text

Use one of these records?

## 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	Operator	Value	
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND

Add Filter Logic...



Save

Save &amp; New

Cancel



# PROFILES

A profile is a group/collection of settings and permissions that define what a user can do in salesforce.

## Types of profiles in salesforce

### Standard profiles:

\*By default salesforce provides below standard profiles.

\*Contract Manager

\*Read Only

\*Marketing User

\*Solutions Manager

\*Standard User

\*System Administrator.

\*We cannot delete standard ones

### Custom Profiles:

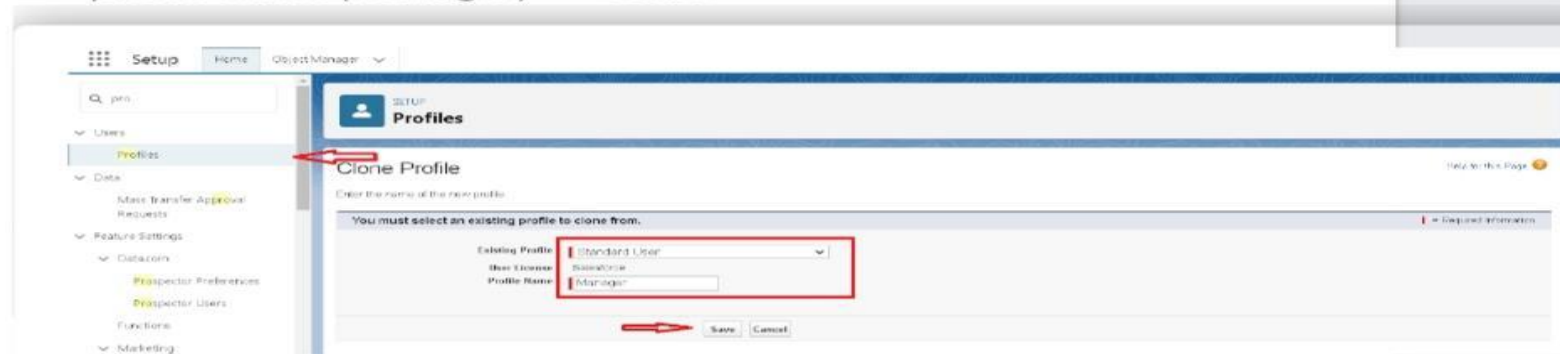
\*Custom ones defined by us.

\*They can be deleted if there are no users assigned with that particular one.

# MANAGER PROFILE

## To create a new profile:

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



The screenshot shows the Salesforce Setup interface. In the left sidebar, the 'Profiles' link is highlighted. The main content area is titled 'Clone Profile'. It contains a form with the following fields:

- Existing Profile:** A dropdown menu with 'Standard User' selected.
- Base License:** A dropdown menu with 'Salesforce' selected.
- Profile Name:** A text input field containing 'Manager'.

Below the form are 'Save' and 'Cancel' buttons. A red arrow points to the 'Save' button.

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



The screenshot shows the 'Profile Manager' page for the 'Manager' profile. It includes a 'Profile Detail' section with the following information:

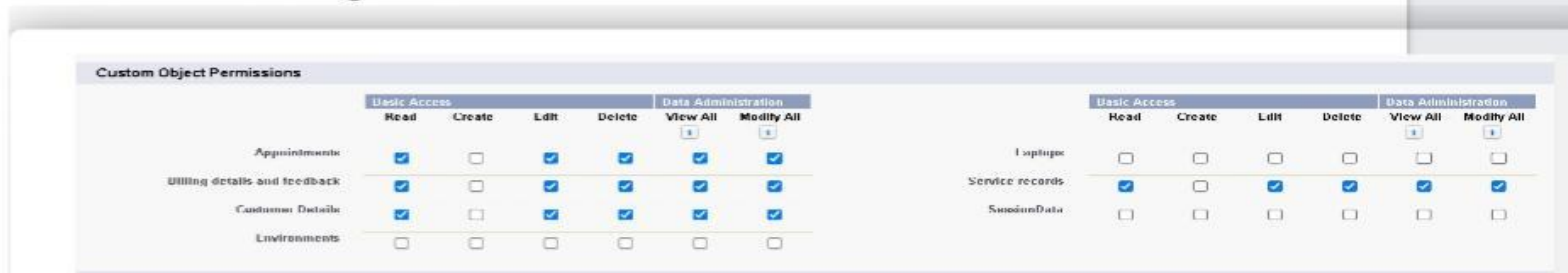
Name	Manager
Base License	Salesforce
Description	
Created By	admin@1, 13/06/2023, 2:40 pm
Modified By	admin@1, 13/06/2023, 2:40 pm

At the top of the 'Profile Detail' section, there are buttons: 'Edit', 'Clone', 'Delete', and 'View Users'. The 'Edit' button is highlighted with a red box.

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.



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

# SALES PERSON PROFILE

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

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

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Laptops	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service records	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SessionData	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. And click save.

# ROLE & ROLE HIERARCHY

A role in Salesforce defines a user's visibility access at the record level.

## Creating Manager Role

Creating Manager Role:

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

The screenshot displays the Salesforce Setup interface for the 'Roles' section. On the left, a sidebar contains a search bar with 'roles' entered, and a list of navigation options including 'Users', 'Roles', 'Feature Settings', 'Sales', 'Service', and 'Case Teams'. The main content area is titled 'Understanding Roles' and includes a description: 'Set up your Role Hierarchy to control how your organization reports on and accesses data.' Below this, a 'Sample Role Hierarchy' is shown, which is a 'Territory-based Sample'. The hierarchy diagram illustrates a top-down structure starting with 'Executive Staff' (CEO, President, CFO, VP Sales) at the top. This branches into three regional roles: 'Western Sales Director', 'Eastern Sales Director', and 'International Sales Director'. Each regional director role further branches into specific regional roles: 'Western Sales Rep', 'Eastern Sales Rep', and 'International Sales Rep'. To the right of the diagram, there are three callout boxes providing details about each level of the hierarchy, such as 'View & edit data, roll up forecasts, & generate reports for all users below' for the regional directors. At the bottom right, there is a 'Get Tips Here' button and a checkbox labeled 'Don't show this page again'.

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

#### Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)

[-] Nick Enterprises

    Add Role

    [-] CEO Edit | Del | Assign

        Add Role

        [-] HR Edit | Del | Assign

            Add Role

        [-] Manager Edit | Del | Assign

            Add Role

        [-] On Site Emp Edit | Del | Assign

            Add Role

        [-] Remote Emp Edit | Del | Assign

            Add Role

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

#### Role Edit

Label

Role Name

This role reports to

Role Name as displayed on reports



Save

Save & New

Cancel

# CREATING ANOTHER ROLES

Creating another two roles under manager

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



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

# USERS

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records.

## CREATE USER

**New User** [Help for this Page](#)

**User Edit** Save Save & New Cancel

**General Information**

First Name   
Last Name   
Alias   
Email   
Username   
Nickname  [i](#)  
Title   
Company   
Department   
Division

**Required Information**

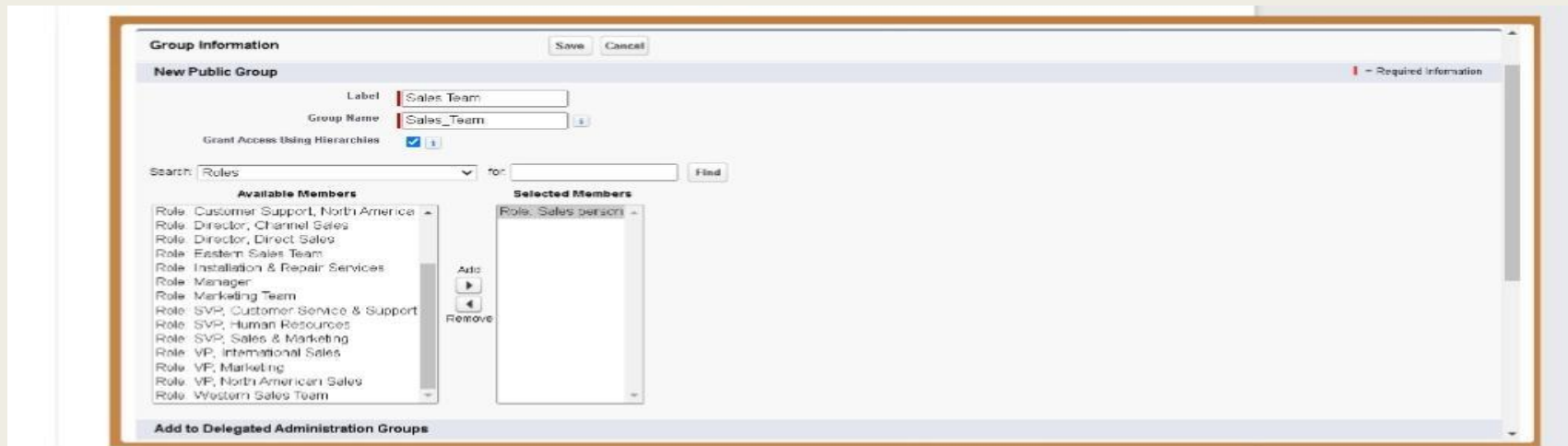
Role  [i](#)  
User License   
Profile  [i](#)  
Active ☒  
Marketing User ☐  
Offline User ☐  
Knowledge User ☐  
Flow User ☐  
Service Cloud User ☐  
Site.com Contributor User ☐  
Site.com Publisher User ☐  
WDC User ☐  
Data.com User Type  [i](#)



# PUBLIC GROUPS

- Public groups are a valuable tool for Salesforce administrators and developers to streamline user management, data access, and security settings.

## CREATING NEW PUBLIC GROUP



# SHARING SETTING

Salesforce allows you to configure sharing settings to control how records are accessed and shared within your organization.

## CREATING SHARING SETTINGS

The screenshot displays the Salesforce Setup page for Sharing Settings. The page is titled "Sharing Settings" and includes a sidebar with a list of objects. The main content area shows a table of sharing settings for various objects. The "Service records" row is highlighted with a red box, indicating the selected sharing setting is "Private". Below the table, there are sections for "User Visibility Settings" and "Other Settings". The "Save" button at the bottom is also highlighted with a red box.

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

**User Visibility Settings**

Portal User Visibility ☐ [?](#) Site User Visibility ☐ [?](#)

**Other Settings**

Standard Report Visibility ☒ [?](#) Manual User Record Sharing ☐ [?](#) Manager Groups ☐ [?](#)

Minimize the number of roles created, which improves performance by cutting down processing loads ☒ [?](#)

Grant site users access to related cases ☒ [?](#)

Secure guest user record access ☒ [?](#)

Require permission to view record names in lookup fields ☐ [?](#)

**Save** **Cancel**



SETUP

## Sharing Settings

You can use sharing rules only to grant **Read** access to data, not to restrict access.

### Step 1: Rule Name

**|** = Required Information

Label **|** sharing settings

Rule Name **|** sharing\_settings

Description

### Step 2: Select your rule type

Rule Type ☒ Based on record owner ☐ Based on criteria

### Step 3: Select which records to be shared

Service records: owned by members of **|** Roles **|** Sales person

### Step 4: Select the users to share with

Share with **|** Roles **|** Manager

### Step 5: Select the level of access for the users

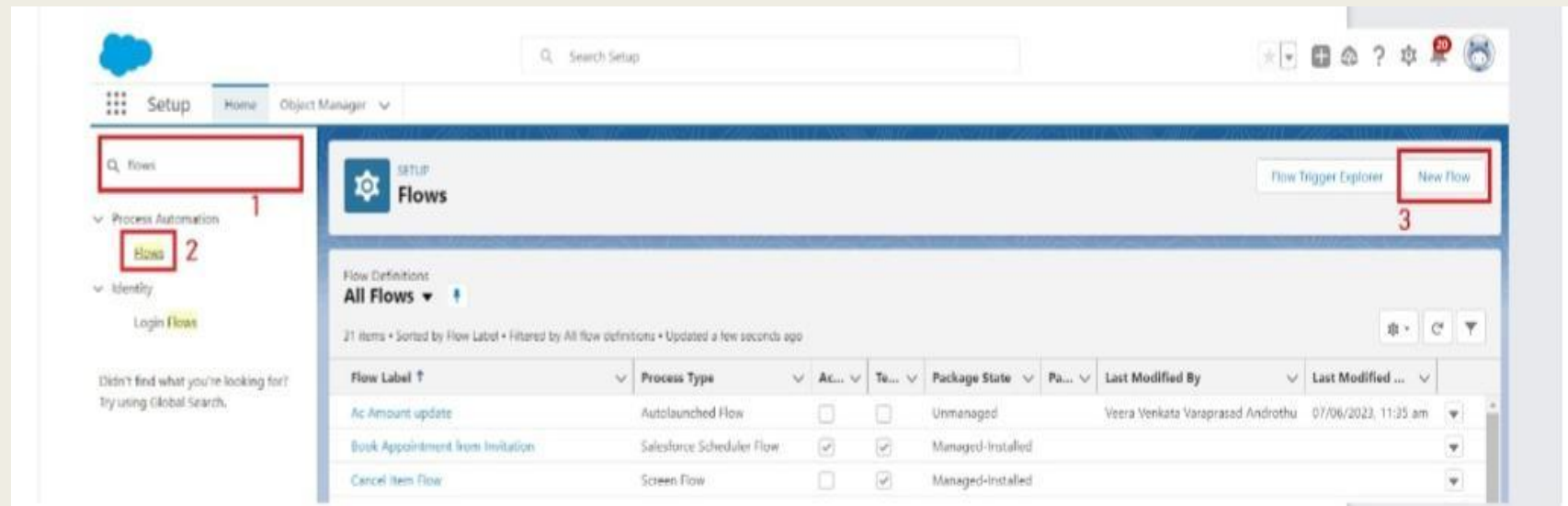
Access Level **|** Read/Write

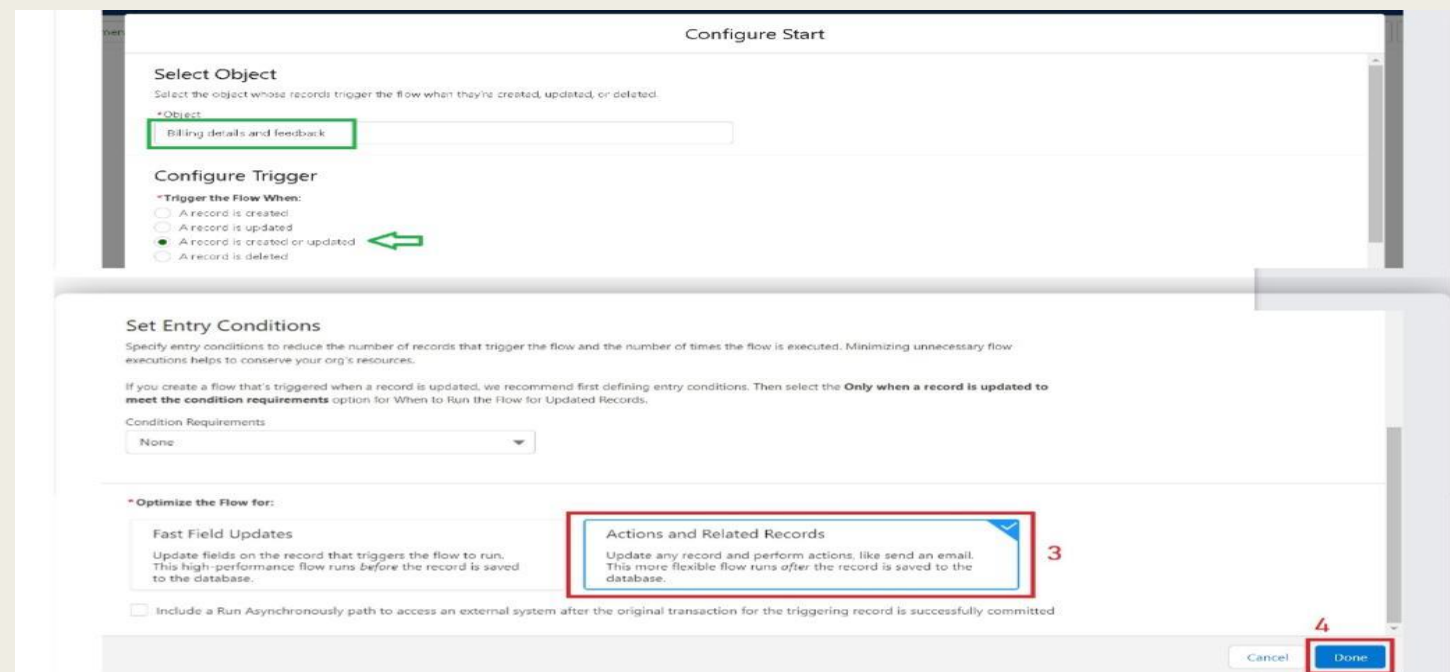
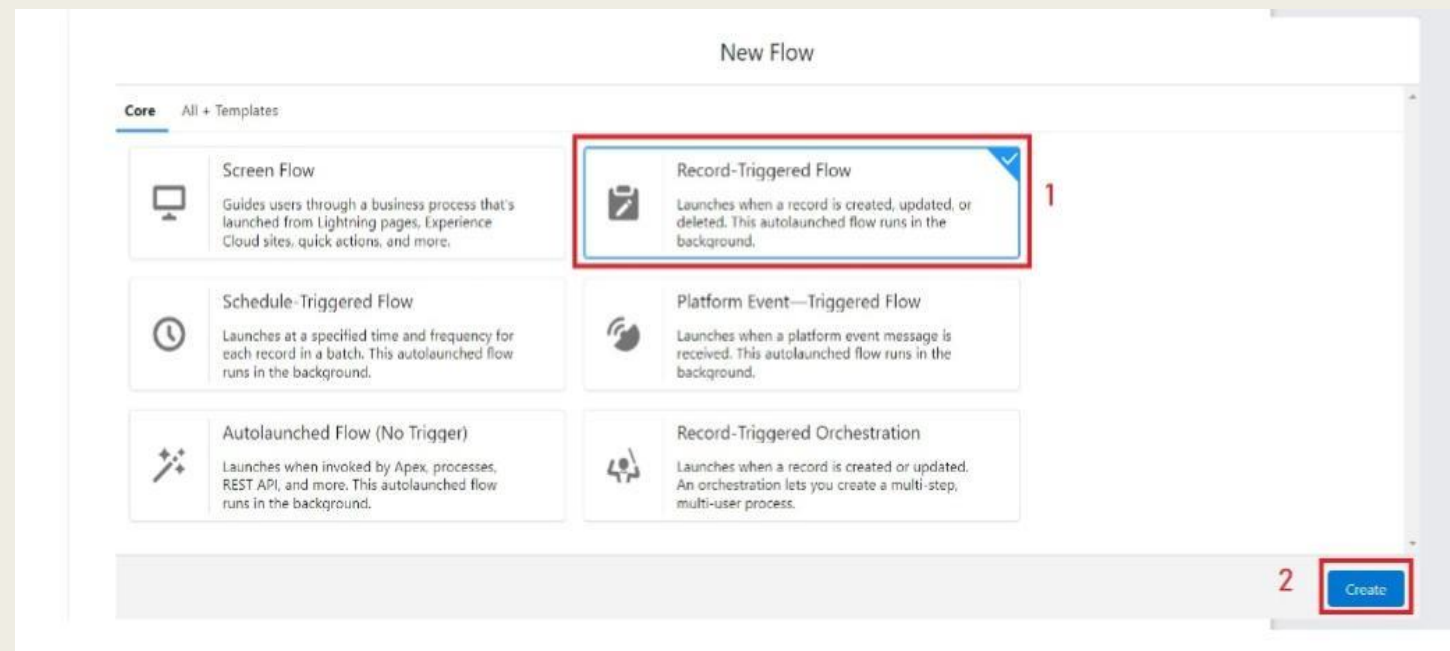
Save Cancel

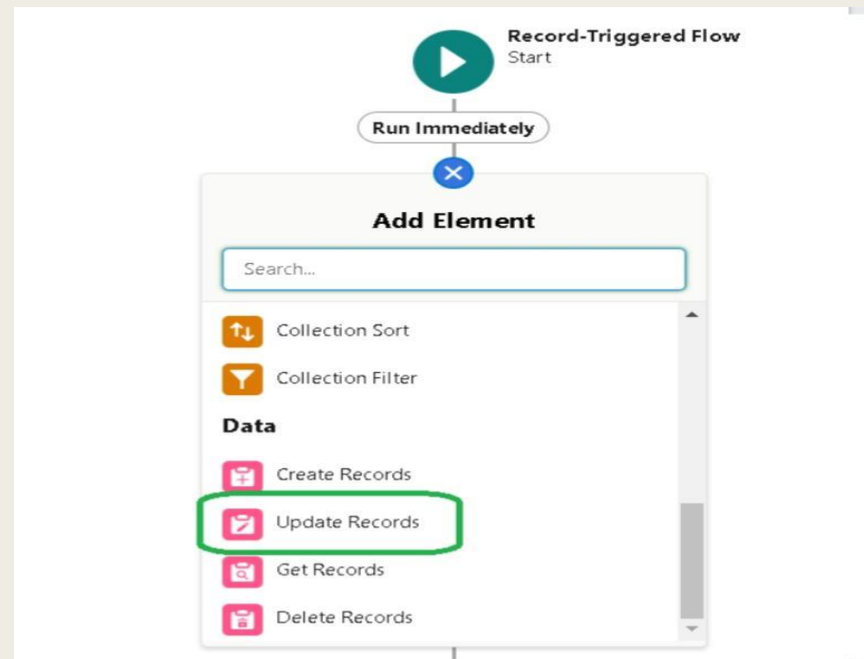
# FLOWS

In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps.

## CREATE A FLOW







### Edit Update Records

Update Salesforce records using values from the flow.

*Label	*API Name
<input type="text" value="Amount Update"/>	<input type="text" value="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

### Set Filter Conditions

Condition Requirements to Update Record

All Conditions Are Met (AND) ▼

Field

Payment\_Status\_\_c

Operator

Equals ▼

Value

Completed

+ Add Condition

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

Field

Payment\_Paid\_\_c

Value

← \$Record > Service records > Appointment > Service A... X

+ Add Field

Cancel

Done



Flow Builder

Billing Amount Flow - V1



Select Elements



Toolbox



Manager



Search this flow...

New Resource

RESOURCES

### Edit Text Template

\*API Name  
alert

Description

\*Body ⓘ  
Insert a resource... View as Plain Text ▼

Dear (!\$Record.Service\_records\_\_r.Appointment\_\_r.Customer\_Name\_\_r.Name),

Cancel Done

### Edit Action

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

\*Label  
Email Alert

\*API Name  
Email\_Alert

Description

#### Set Input Values for the Selected Action

A Body ⓘ  
(!alert)

A Email Template ID

Log Email on Send

Include

Don't include

Don't include



Record-Triggered Flow

Start

Save as

A New Version

A New Flow

\*Flow Label

Billing Amount Flow

\*Flow API Name

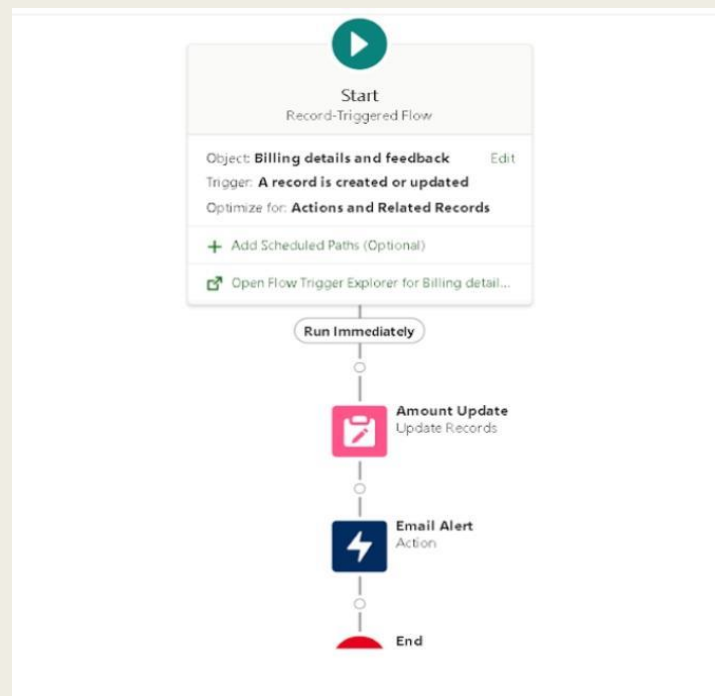
Billing\_Amount\_Flow

Description

Show Advanced

Cancel

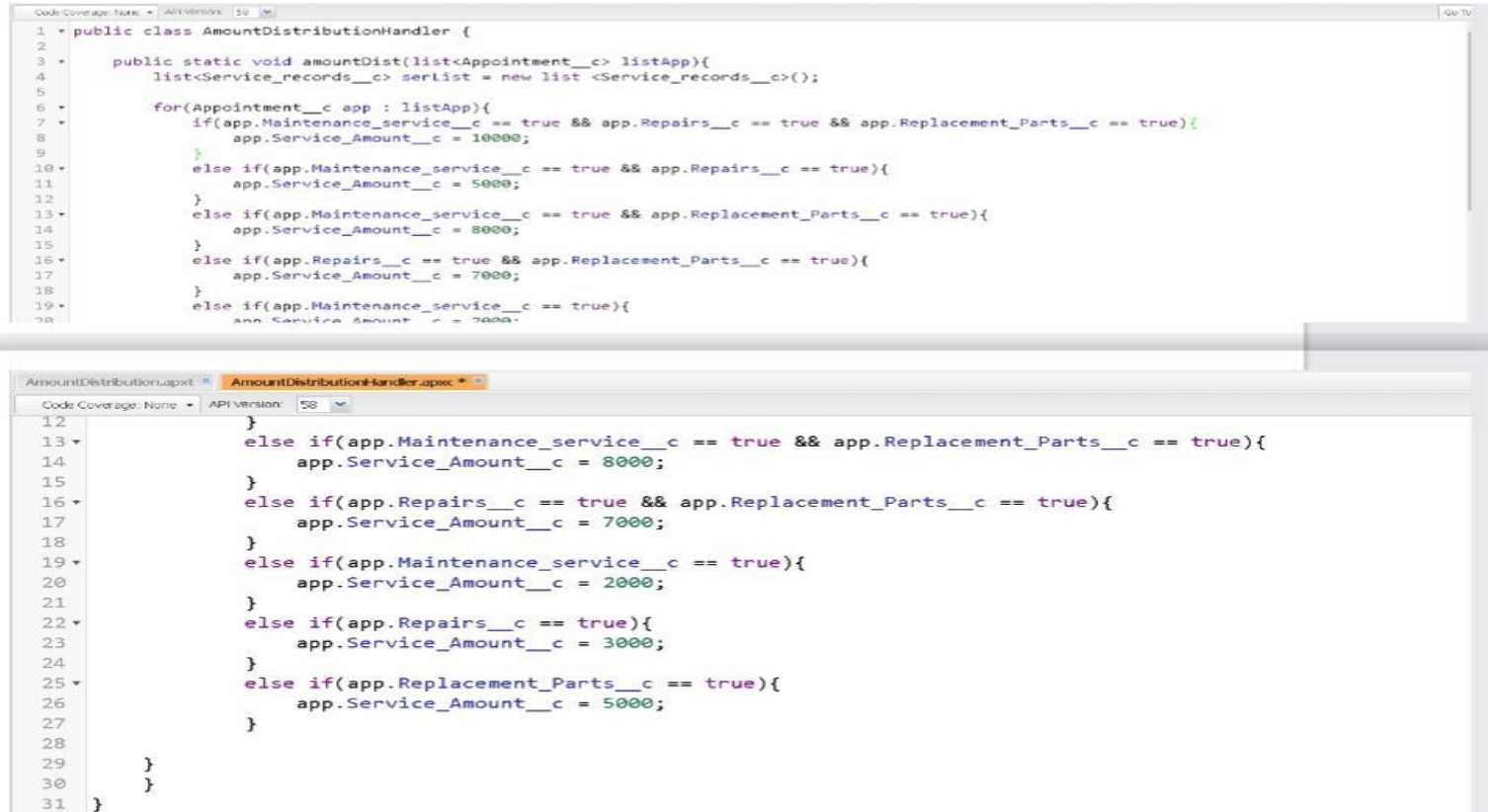
Save



# APEX TRIGGER

Apex can be invoked by using triggers. Apex triggers enable you to perform custom actions

## APEX HANDLER



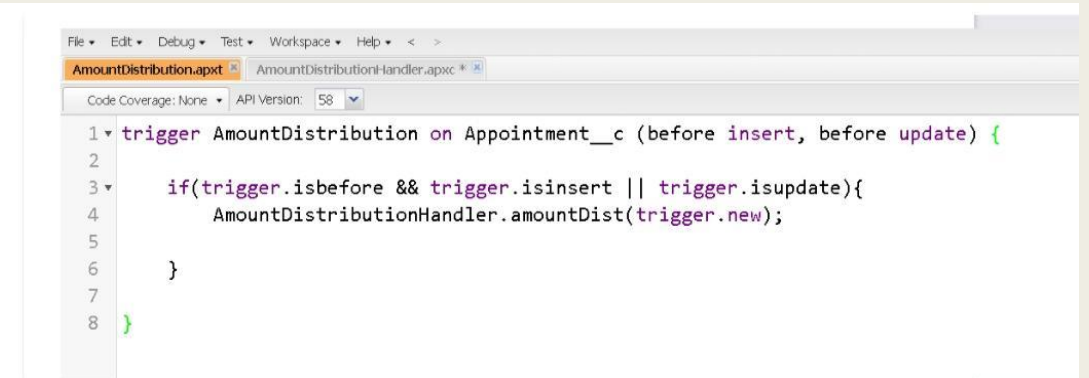
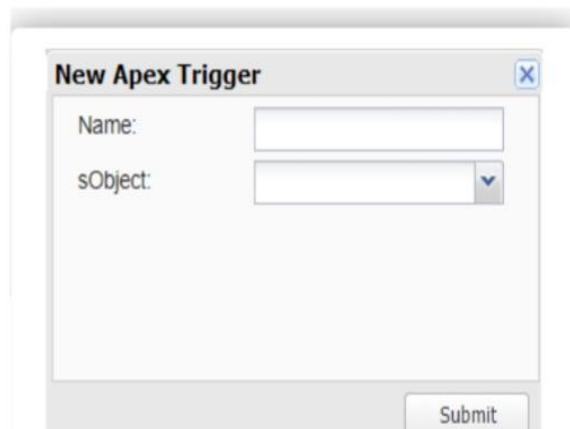
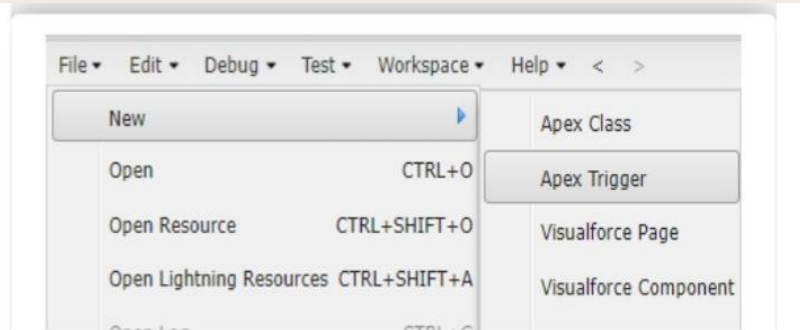
```
1 public class AmountDistributionHandler {
2
3     public static void amountDist(list<Appointment__c> listApp){
4         list<Service_records__c> serlist = new list<Service_records__c>();
5
6         for(Appointment__c app : listApp){
7             if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){
8                 app.Service_Amount__c = 10000;
9             }
10            else if(app.Maintenance_service__c == true && app.Repairs__c == true){
11                app.Service_Amount__c = 5000;
12            }
13            else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
14                app.Service_Amount__c = 8000;
15            }
16            else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
17                app.Service_Amount__c = 7000;
18            }
19            else if(app.Maintenance_service__c == true){
20                app.Service_Amount__c = 2000;
21            }
22            else if(app.Repairs__c == true){
23                app.Service_Amount__c = 3000;
24            }
25            else if(app.Replacement_Parts__c == true){
26                app.Service_Amount__c = 5000;
27            }
28        }
29    }
30 }
31 }
```

Code:

```
public class AmountDistributionHandler {

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

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



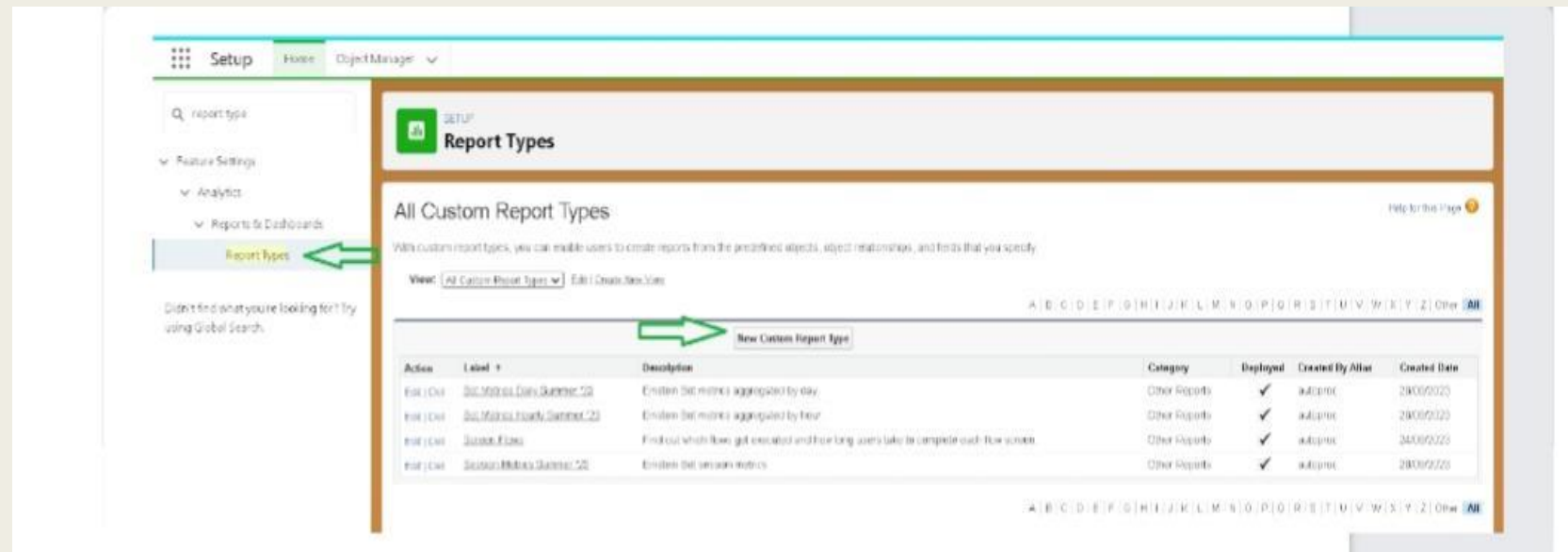
Code:

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

# REPORTS

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations

## CREATE REPORT TYPE



SETUP

Report Types

Report Type Focus

Specify what type of records (rows) will be the focus of reports generated by this report type.

Example: If reporting on "Contacts with Opportunities with Partners," select "Contacts" as the primary object.

Primary Object: Customer Details

Identification

Report Type Label: Service information

Report Type Name: Service information

Description: Service information

Note: Description will be visible to users who create reports.

Store in Category: Other Reports

Deployment

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

Deployment Status: in Development Deployed

Next

Cancel

## Step 2. Define Report Records Set

This report type will generate reports about Customer Details. You may define which related records from other objects are

A

Customer Details

Primary Object

B

Appointments

A to B Relationship:

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

(Click to relate another object)

## New Custom Report Type

### Service information

#### Step 2. Define Report Records Set

Step 2 of 2

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

A

Customer Details

Primary Object

B

Appointments

A to B Relationship:

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

## Report Types

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

A

Customer Details

Primary Object

B

Appointments

A to B Relationship:

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

C

Service records

B to C Relationship:

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

D

Billing details and feedback

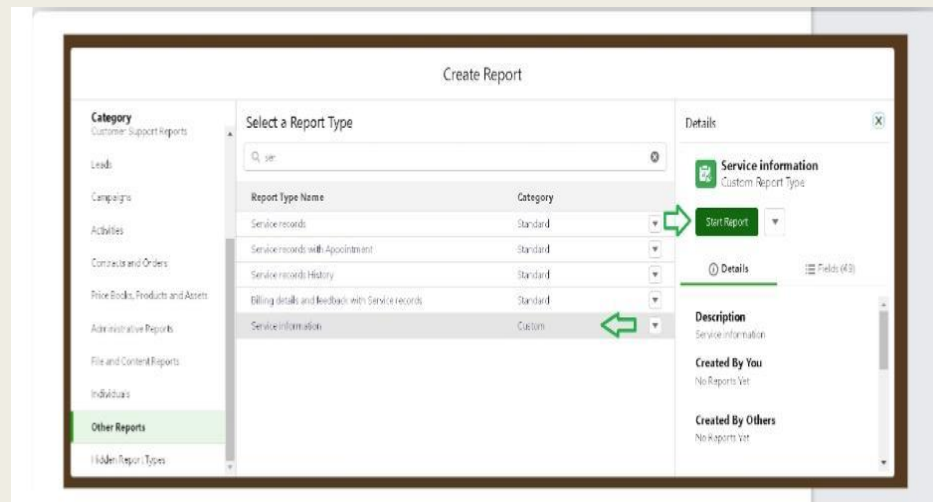
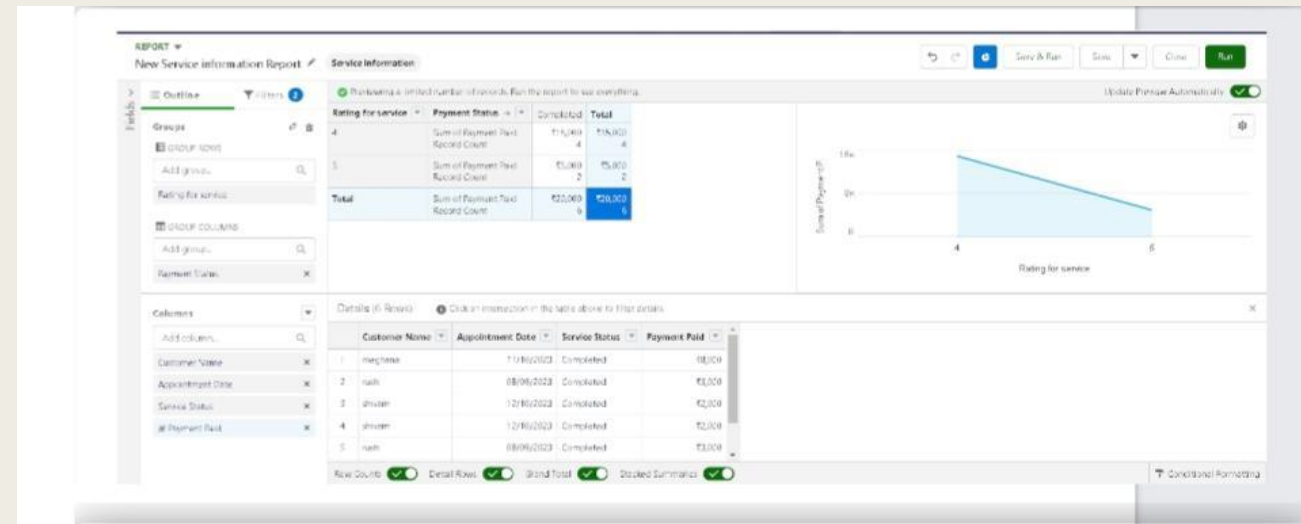
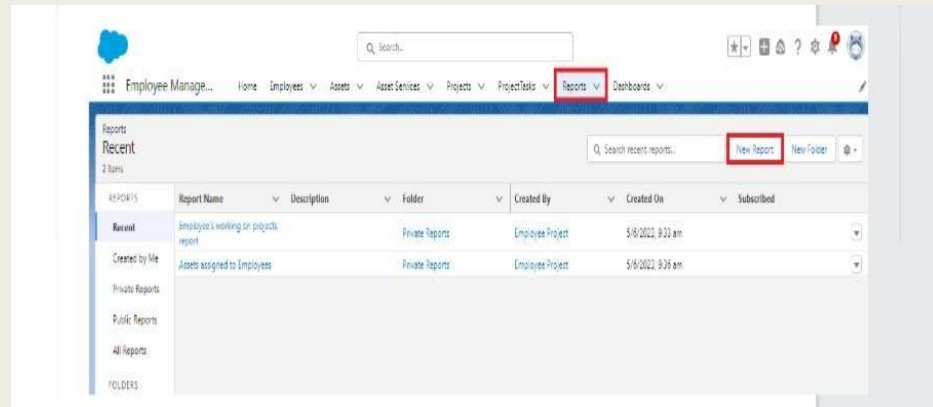
C to D Relationship:

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

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

Previous Save Cancel

# CREATE REPORT

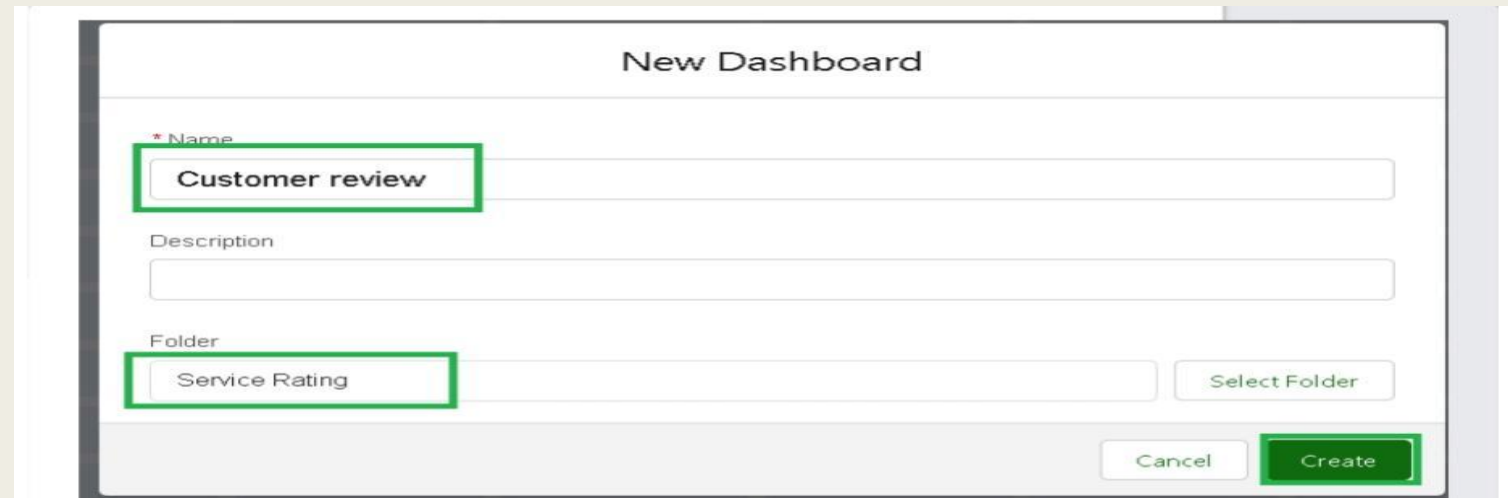


This screenshot shows the 'Save Report' dialog box. It has a 'Report Name' field, a 'Report Unique Name' field, a 'Report Description' field, and a 'Folder' field. The 'New Service Information Report' is entered in the 'Report Name' field, and the 'Garage Management Folder' is selected in the 'Folder' field. The 'Save' button is highlighted with a green arrow.

# DASHBOARDS

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports

## CREATE DASHBOARD

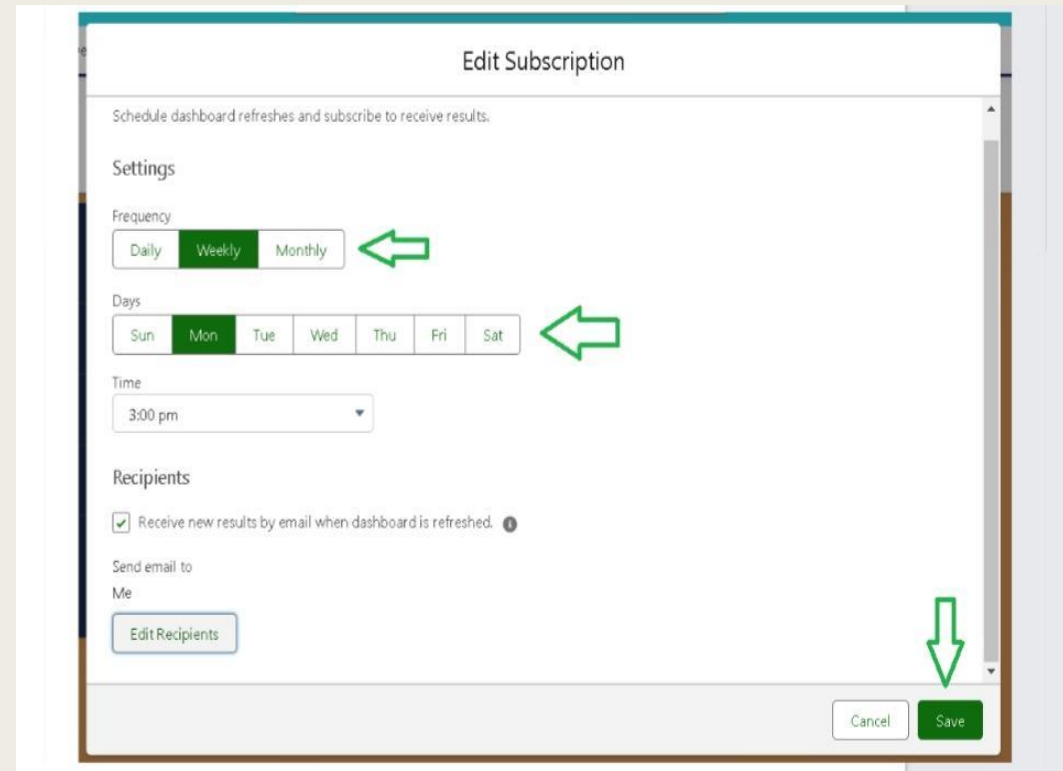
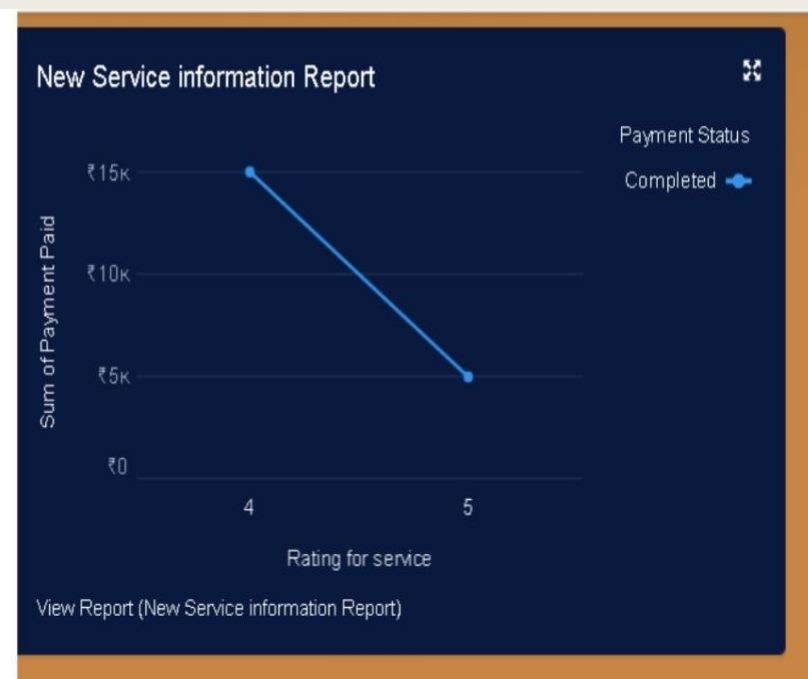
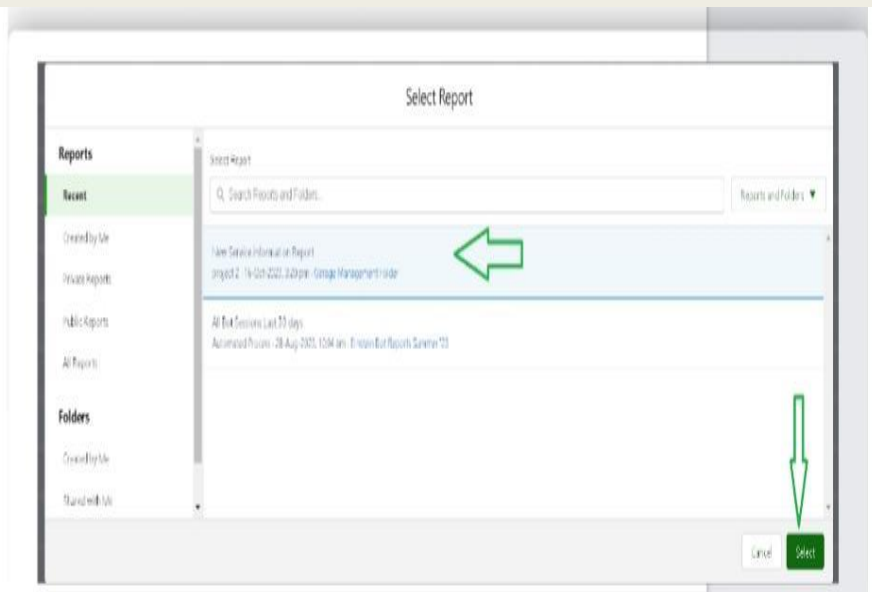


The screenshot shows a 'New Dashboard' form with the following fields and controls:

- Name:** A text input field containing 'Customer review', highlighted with a green border.
- Description:** An empty text input field.
- Folder:** A text input field containing 'Service Rating', highlighted with a green border.
- Select Folder:** A button located to the right of the Folder input field.
- Buttons:** 'Cancel' and 'Create' buttons at the bottom right of the form.







# USER ADOPTION

## CREATING RECORDS

New Customer Detail

\* = Required Information

Information

\* Customer Name  ↩

Owner

Phone number  ↩

Gmail  ↩

Garage Manage... Customer Details ▾ Appointments ▾ Service records ▾ Billing details and feedback ▾ Reports ▾ Dashboards ▾

Appointment  
**app-016**

Appointment Name  Owner

Customer Details  ↩

\* Appointment Date  ↩

Maintenance service ☒ ↩

Repairs ☒ ↩

Replacement Parts ☐

Service Amount  ↩

\* Vehicle number plate

Created By:

New Service record

\* = Required Information

Information

Service Record Name

Owner

Annapurna SmartBridge

\* Appointment

app-016

X

Quality Check Status

☐

Service Status

Started

▼

Cancel

Save & New

Save

Service Record Name

ser-010

Owner

Annapurna SmartBridge

\* Appointment

app-016

X

Quality Check Status

☒

Service Status

Started

▼

service date

18/11/2024

This field is calculated upon save

Created By

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

Cancel

Save

Modified By

Annapurna SmartBridge, 18/11/2024, 4:34 pm

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

# ADVANTAGES & DISADVANTAGES

Pros	Cons
<ul style="list-style-type: none"><li>✓ Customization</li><li>✓ Cloud-based Access</li><li>✓ Artificial Intelligence</li><li>✓ Reporting and Analytics</li></ul>	<ul style="list-style-type: none"><li>✗ Expensive</li><li>✗ Cloud-only Deployment</li><li>✗ Complicated Implementation</li><li>✗ Poor Customer Support Reputation</li></ul>

# CONCLUSION

Implementing a garage management system in Salesforce can be a powerful solution for automotive service centers and garages.

By leveraging the capabilities of Salesforce, organizations can streamline their operations, improve customer satisfaction, and increase efficiency.