



Garage Management System

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Abstract

This project aims to design and implement a comprehensive garage management system leveraging Salesforce's robust platform. The system will streamline operations, enhance customer engagement, and boost productivity for garage owners and managers. Key features include:

Vehicle management: tracking maintenance, repairs, and inspections

Customer relationship management: managing customer interactions, appointments, and feedback

Inventory management: monitoring parts, supplies, and equipment

Work order management: assigning, tracking, and completing tasks

Reporting and analytics: providing insights into business performance and customer behavior

By harnessing Salesforce's cloud-based technology, this system will enable garage owners to:

Improve customer satisfaction through personalized service and timely communication

Increase operational efficiency through automated workflows and real-time tracking

Drive business growth through data-driven decision-making and targeted marketing

This project will demonstrate how Salesforce can be successfully adapted to meet the unique needs of the garage management industry, providing a scalable and flexible solution for businesses of all sizes.

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- Apex Trigger
- Reports
- Dashboards

Introduction

A Garage Management System (GMS) in Salesforce is a specialized application designed to streamline and optimize the operations of a garage or automotive service center by leveraging Salesforce's robust and customizable platform. This system integrates various functionalities essential for managing automotive service businesses, including customer relationship management (CRM), inventory management, service scheduling, invoicing, and analytics. Key features include a comprehensive customer database to manage customer information and service history, automated communication tools for service reminders and follow-ups, and an efficient service scheduling system that integrates with calendars to manage technician schedules and service bays. It also includes work order management, inventory tracking, and automated reordering to ensure parts availability, as well as supplier management. Billing and invoicing features allow for the creation of service estimates, detailed invoicing, and secure payment processing through integrated payment gateways. Performance dashboards and custom reporting tools help visualize key performance indicators and analyze various aspects of the business. Mobile access through a dedicated app enables technicians and managers to access schedules and update work orders on the go. The system supports extensive customization to meet specific business needs, scalability to accommodate growth, and integrates with other systems for seamless operation. Being cloud-based, it ensures data accessibility from anywhere, enhances security to protect sensitive information, and automates routine tasks to reduce manual effort and errors. Implementing a GMS in Salesforce involves analyzing requirements, customizing the platform, integrating with existing systems, training staff, deploying the system, and providing ongoing support and maintenance. This implementation can significantly enhance operational efficiency, improve customer satisfaction, and drive business growth for automotive service centers.

Objects

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:

1. **Standard Objects:** Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
2. **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.

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.

The screenshot shows the Salesforce Object Manager interface for a custom object named 'Customer Detail'. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, and Search Layouts. The main content area is titled 'Customer Detail' and includes an 'Edit' button and a 'Delete' button. The 'Details' section is expanded, showing the following configuration:

Field	Value
Description	
API Name	Customer_Detail__c
Custom	<input checked="" type="checkbox"/>
Singular Label	Customer Detail
Plural Label	Customer Details
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	<input checked="" type="checkbox"/>
Track Field History	<input checked="" type="checkbox"/>
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

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.

The screenshot shows the Salesforce Object Manager interface for the 'Appointment' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, and Record Types. The main content area is titled 'Appointment' and includes a 'Details' tab. The 'Details' section contains the following fields and values:

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

At the top right of the main content area, there are 'Edit' and 'Delete' buttons.

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.

SETUP > OBJECT MANAGER

Service records

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Details

Description

API Name
Service_records__c

Custom
✓

Singular Label
Service records

Plural Label
Service records

Enable Reports
✓

Track Activities

Track Field History
✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Create Billing details and feedback Object

To create an object:

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

Tabs

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

To create a Tab:

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. Select Object(Customer Details) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .
3. Make sure that the Append tab to users' existing personal customizations is checked.
4. Click save.
5. Repeat the step from 1 to 4 to make other tabs also .

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'tabs' entered, and the 'User Interface' section is expanded, showing 'Rename Tabs and Labels' and 'Tabs'. The main content area is titled 'Custom Tabs' and includes a 'New' button and a 'What Is This?' link. Below this is a table of existing custom object tabs.

Action	Label	Tab Style	Description
Edit Del	Appointments	Books	
Edit Del	Billing details and feedback	Bank	
Edit Del	Customer Details	Car	
Edit Del	Service records	Hammer	

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.

To create a lightning app page:

1. Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App.
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.
3. To Add Navigation Items:
4. 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.
5. To Add User Profiles:

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

← Lightning App Builder

⚙ App Settings

📄 Pages ▾

Garage Management Application

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

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 ⓘ
Garage Management Application

* Developer Name ⓘ
Garage_Management_Application

Description ⓘ
Enter a description...

App Branding

Image ⓘ

Upload

Primary Color Hex Value ⓘ

▼

 #0070D2

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

App Launcher Preview

GM

 Garage Management Appli...

← Lightning App Builder

⚙ App Settings

📄 Pages ▾

Garage Management Application

App Settings

App Details & Branding

App Options

Utility Items (Desktop Only)

Navigation Items

User Profiles

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 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

Create ▾

Type to filter list...

Accounts

All Sites

Alternative Payment Methods

Analytics

App Launcher

Approval Requests

Asset Action Sources

Selected Items

Customer Details

Appointments

Billing details and feedback

Service records

Dashboards

Reports

User Profiles

Choose the user profiles that can access this app.

Available Profiles

Type to filter list...

Analytics Cloud Integration User

Analytics Cloud Security User

Authenticated Website

Authenticated Website

B2B Reordering Portal Buyer Profile

Contract Manager

Selected Profiles

System Administrator

Manager

sales person

Fields

To create another fields in an object:

- Go to setup >> click on Object Manager >> type object name(Customer Details) in search bar >> click on the object.
- Now click on “Fields & Relationships” >> New
- Select Data type as a “Email” and Click on Next
- Fill the Above as following:
- Field Label : Gmail
- Field Name : gets auto generated
- Click on Next >> Next >> Save and new.

SETUP > OBJECT MANAGER
Customer Detail

Details

Fields & Relationships
6 Items, Sorted by Field Label

Q Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer Name	Name	Text(80)		✓
Gmail	Gmail__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone no	Phone_no__c	Phone		

Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts

Setup Home Object Manager

SETUP > OBJECT MANAGER
Appointment

Details

Fields & Relationships
11 Items, Sorted by Field Label

Q Quick Find

New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment Date	Appointment_Date__c	Date		
Appointment Name	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Customer Name	customer_Name__c	Lookup(Customer Detail)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Maintenance service	Maintenance_service__c	Checkbox		
Owner	OwnerId	Lookup(User,Group)		✓
Repairs	Repairs__c	Checkbox		
Replacement Parts	Replacement_Parts__c	Checkbox		

Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules

Setup

Home

Object Manager

Service records

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Fields & Relationships

8 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment	Appointment_c	Lookup(Appointment)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Quality Check Status	Quality_Check_Status__c	Checkbox		
service date	service_date__c	Formula (Date)		
Service records Name	Name	Auto Number		✓
Service Status	Service_Status__c	Picklist		

Setup

Home

Object Manager

Billing details and feedback

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Restriction Rules

Fields & Relationships

8 Items, Sorted by Field Label

Quick Find

New

Deleted Fields

Field Dependencies

Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Billing details and feedback Name	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Payment Paid	Payment_Paid__c	Currency(18, 0)		
Payment Status	Payment_Status__c	Picklist		
Rating for service	Rating_for_service__c	Text(1)		
Service records	Service_records__c	Lookup(Service records)		✓

Validation Rule

To create a validation rule

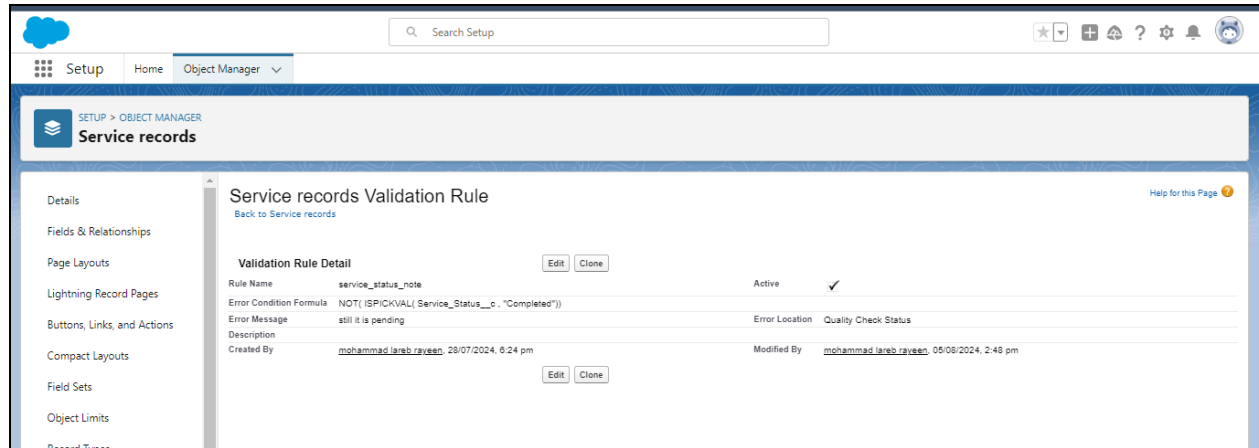
1. Go to the setup page >> click on object manager >> From drop down click edit for Appointment object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as " Vehicle ".
4. Insert the Error Condition Formula as : -
`NOT(REGEX(Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))`
5. Enter the Error Message as "Please enter valid number ", select the Error location as Field and select the field as "Vehicle number plate", and click Save.

The screenshot shows the Salesforce Setup interface. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. The left sidebar lists various setup options like 'Details', 'Fields & Relationships', 'Page Layouts', etc. The main content area is titled 'Appointment Validation Rule' and contains a table with the following details:

Validation Rule Detail		Active
Rule Name	Vehicle	✓
Error Condition Formula	NOT(REGEX(Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))	
Error Message	Please enter valid number.	Error Location Vehicle number plate
Description		
Created By	mohammad jareb rabeen, 28/07/2024, 6:23 pm	Modified By mohammad jareb rabeen, 01/08/2024, 1:23 pm

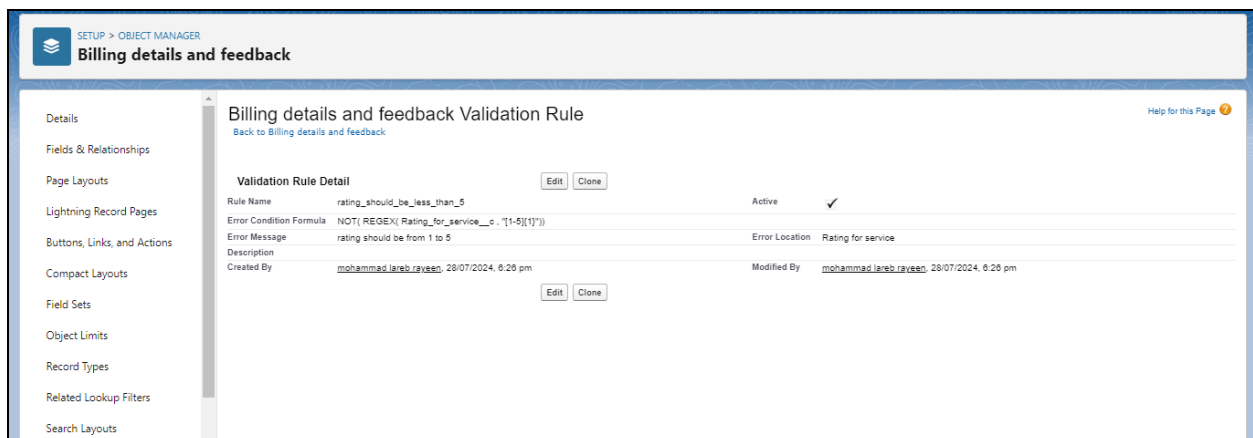
An Service records Object

1. Go to the setup page >> click on object manager >> From drop down click edit for Service records object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as " service_status_note ".
4. Insert the Error Condition Formula as : -
`NOT(ISPICKVAL(Service_Status__c , "Completed"))`
5. Enter the Error Message as "still it is pending", select the Error location as Field and select the field as "Service status", and click Save.



An Billing details and feedback Object

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



Duplicates Rule

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. Unique name : is auto populated
6. Define the matching criteria as
7.

Field	Matching Method
1. Gmail	Exact
2. Phone Number	Exact
8. Click save.
9. After Saving Click on Activate.

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'matc' and a navigation menu with 'Data' and 'Duplicate Management' expanded, showing 'Matching Rules'. The main content area is titled 'Matching Rules' and shows a specific rule named 'Matching customer details'. The rule details are as follows:

Matching Rule Detail	
Object	Customer Detail
Rule Name	Matching customer details
Unique Name	Matching_customer_details
Description	
Matching Criteria	(Customer_Detail: Gmail EXACT MatchBlank = FALSE) AND (Customer_Detail: Phone_no EXACT MatchBlank = FALSE)
Status	Active
Created By	mohammad jacob rayaan, 28/07/2024, 6:27 pm
Modified By	mohammad jacob rayaan, 28/07/2024, 6:28 pm

Profiles

To 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.
- 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

The screenshot shows the 'Profile Manager' page in Salesforce. The profile name is 'Manager'. Below the name, there are links for various permissions: Login IP Ranges, Enabled Apex Class Access, Enabled Visualforce Page Access, Enabled External Data Source Access, Enabled Named Credential Access, Enabled External Credential Principal Access, Enabled Custom Metadata Type Access, Enabled Custom Setting Definitions Access, Enabled Flow Access, Enabled Service Presence Status Access, and Enabled Custom Permissions. The 'Profile Detail' section shows the Name as 'Manager', User License as 'Salesforce', Description as 'Custom Profile', Created By as 'mohammad.larab.raveen' on 28/07/2024 at 8:30 pm, and Modified By as 'mohammad.larab.raveen' on 05/08/2024 at 3:53 pm. There are buttons for Edit, Clone, Delete, and View Users.

The screenshot shows the 'Custom Object Permissions' section of the 'Manager' profile. It displays two tables: 'Basic Access' and 'Data Administration'. The 'Basic Access' table has columns for Read, Create, Edit, Delete, View All, and Modify All. The 'Data Administration' table has columns for Read, Create, Edit, Delete, View All, and Modify All. The objects listed are Appointments, Billing details and feedback, Brokers, and Customer Details. The 'Session Settings' section shows 'Session Times Out After' as '8 hours of inactivity' and 'Session Security Level Required at Login'. The 'Password Policies' section shows 'User passwords expire in' as 'Never expires', 'Enforce password history' as '3 passwords remembered', 'Minimum password length' as '8', 'Password complexity requirement' as 'Must include alpha and numeric characters', 'Password question requirement' as 'Cannot contain password', 'Maximum invalid login attempts' as '10', 'Lockout effective period' as '15 minutes', 'Obscure secret answer for password resets' as 'No', 'Require a minimum 1 day password lifetime' as 'No', and 'Don't immediately expire links in forgot password emails' as 'No'.

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.
5. And click save.

Profile
sales person

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

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

[Login IP Ranges](#) | [Enabled Apex Class Access](#) | [Enabled Visualforce Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled External Credential Principal Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Setting Definitions Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

Profile Detail [Edit](#) [Clone](#) [Delete](#) [View Users](#)

Name	sales person
User License	Salesforce Platform
Description	
Created By	mohammad jareb rayeen, 28/07/2024, 6:38 pm
Modified By	mohammad jareb rayeen, 05/08/2024, 3:53 pm

Page Layouts

SETUP
Profiles

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"/>
Brokers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Properties	<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"/>
waypoints	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Session Settings

Session Times Out After	2 hours of inactivity
Session Security Level Required at Login	

Password Policies

User passwords expire in	90 days
Enforce password history	3 passwords remembered
Minimum password length	8
Password complexity requirement	Must include alpha and numeric characters
Password question requirement	Cannot contain password
Maximum invalid login attempts	10
Lockout effective period	15 minutes
Obscure secret answer for password resets	<input type="checkbox"/>
Require a minimum 1 day password lifetime	<input type="checkbox"/>

Role & Role Hierarchy

A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

Creating Manager Role:

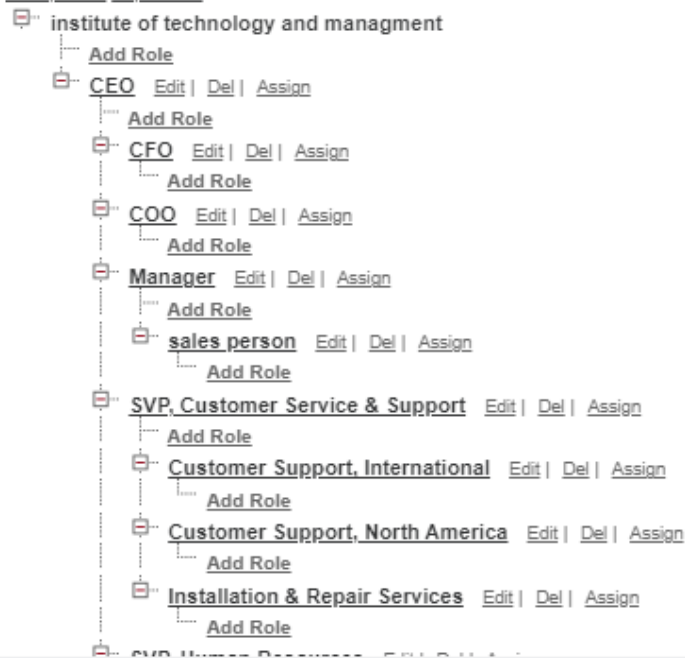
1. Go to quick find >> Search for Roles >> click on set up roles.
2. Click on Expand All and click on add role under whom this role works.
3. Give Label as "Manager" and Role name gets auto populated. Then click on Save.

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

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



Users

Create User

1. Go to setup >> type users in quick find box >> select users >> click New user.
2. 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
3. Save.

The screenshot shows the 'User Detail' page for a user named Niklaus Mikaelson. The page includes a header with the 'SETUP' icon and 'Users' text. Below the user's name, there are several tabs: 'Permission Set Assignments', 'Permission Set Assignments: Activation Required', 'Permission Set Group Assignments', 'Permission Set License Assignments', 'Personal Groups', 'Public Groups Membership', 'Queue Membership', 'Team', 'Managers in the Role Hierarchy', 'OAuth Apps', 'Third-Party Account Links', 'Installed Mobile Apps', 'Authentication Settings for External Systems', 'Login History', and 'User Provisioning Accounts'. The 'User Detail' tab is active, showing a table of user information. The table has columns for Name, Alias, Email, Username, Nickname, Title, Company, Department, Division, Address, Time Zone, Locale, Language, Delegated Approver, Role, User License, Profile, Active, Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, Mobile Push Registrations, and Data.com User Type. The user's details are as follows: Name: Niklaus Mikaelson, Alias: nmika, Email: mikaelson@gmail.com, Username: mikaelson@niklaus1.com, Nickname: User17221723881165032684, Title: , Company: , Department: , Division: , Address: Samadhiya Colony Road Samadhiya Colony Kala Saiyad A 14/4 Gwalior 474001 Madhya Pradesh India, Time Zone: (GMT+05:30) India Standard Time (Asia/Kolkata), Locale: English (India), Language: English, Delegated Approver: , Role: Manager, User License: Salesforce, Profile: Manager, Active: checked, Marketing User: unchecked, Offline User: unchecked, Knowledge User: unchecked, Flow User: unchecked, Service Cloud User: unchecked, Site.com Contributor User: unchecked, Site.com Publisher User: unchecked, WDC User: unchecked, Mobile Push Registrations: View, Data.com User Type: .

Name	Alias	Email	Username	Nickname	Title	Company	Department	Division	Address	Time Zone	Locale	Language	Delegated Approver	Role	User License	Profile	Active	Marketing User	Offline User	Knowledge User	Flow User	Service Cloud User	Site.com Contributor User	Site.com Publisher User	WDC User	Mobile Push Registrations	Data.com User Type
Niklaus Mikaelson	nmika	mikaelson@gmail.com	mikaelson@niklaus1.com	User17221723881165032684					Samadhiya Colony Road Samadhiya Colony Kala Saiyad A 14/4 Gwalior 474001 Madhya Pradesh India	(GMT+05:30) India Standard Time (Asia/Kolkata)	English (India)	English		Manager	Salesforce	Manager	checked	unchecked	unchecked	unchecked	unchecked	unchecked	unchecked	unchecked	View	.	

Creating another users

<input type="checkbox"/>	Edit	lodhi_muskan	mlodhi	muskan@lodhi.com	sales_person	<input checked="" type="checkbox"/>	sales_person
<input type="checkbox"/>	Edit	Mikaelson, Niklaus	nmika	mikaelson@niklaus1.com	Manager	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	Edit	raveen, ml	mrave	raveen@ml.com	sales_person	<input checked="" type="checkbox"/>	sales_person

Public Group

Creating New Public Group

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.

SETUP

Public Groups

Group

sales team

Help for this Page ?

EditDeleteView Summary

Label

sales team

Group Name

sales_team

Grant Access Using Hierarchies

✓

Created By

mohammad lareb raveen, 28/07/2024, 6:57 pm

Modified By

mohammad lareb raveen, 28/07/2024, 6:57 pm

View All Users

Name	Type
sales person	Role

Role

sales person

Help for this Page ?

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: institute of technology and managment » CEO » Manager » sales person

Users in sales person Role (2)

Role Detail

EditDelete

Label

sales person

This role reports to

Manager

Modified By

mohammad lareb raveen, 28/07/2024, 6:42 pm

Opportunity Access

Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities

Case Access

Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases

Role Name

sales_person

Role Name as displayed on reports

Sharing Groups

Role, Role and Subordinates

Users in sales person Role

Assign Users to RoleNew User

Users in sales person Role Help ?

Action	Full Name	Alias	Username	Active
Edit	ml raveen	mrave	raveen@ml.com	✓
Edit	muskan lodhi	mlodh	muskan@lodhi.com	✓

Sharing Settings

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 Rules.
- 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.

SETUP
Sharing Settings

Service records	Private	Private	<input type="checkbox"/>
Streaming Channel	Public Read/Write	Private	<input type="checkbox"/>
Tableau Host Mapping	Public Read Only	Private	<input type="checkbox"/>
Thanks	Public Read Only	Private	<input type="checkbox"/>
Web Cart Document	Private	Private	<input type="checkbox"/>
Work Order	Private	Private	<input type="checkbox"/>
Work Plan	Private	Private	<input type="checkbox"/>
Work Plan Template	Private	Private	<input type="checkbox"/>
Work Step Template	Private	Private	<input type="checkbox"/>
Appointment	Public Read/Write	Private	<input checked="" type="checkbox"/>
Billing details and feedback	Public Read/Write	Private	<input checked="" type="checkbox"/>
Broker	Public Read/Write	Private	<input checked="" type="checkbox"/>
Customer Detail	Public Read/Write	Private	<input checked="" type="checkbox"/>
Property	Public Read/Write	Private	<input checked="" type="checkbox"/>
Service records	Private	Private	<input checked="" type="checkbox"/>
waypoint	Public Read/Write	Private	<input checked="" type="checkbox"/>

Other Settings

Flows

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.
3. Select the Object as "Billing details and feedback" in the Drop down list.
4. Select the Trigger Flow when: "A record is Created or Updated".
5. Select the Optimize the flow for: "Actions and Related Records" and Click on Done.
6. Under the Record-triggered Flow Click on "+" Symbol and In the Drop down List select the "Update records Element".
7. Give the Label Name : Amount Update
8. Api name : is auto populated
9. Set a filter condition : All Conditions are met(AND)
10. Field : Payment_Status__c
11. Operator : Equals
12. Value : Completed
13. And Set Field Values for the Billing details and feedback Record
14. Field : Payment_Paid__c
15. Value : {!\$Record.Service_records__r.Appointment__r.Service_Amount__c}
16. Click On Done.
17. Before creating another Element. Create a New Resource form Toolbox form top left.
18. Click on the New Resource, And select Variable.
19. Select the resource type as text template.
20. Enter the API name as " alert".
21. Change the view as Rich Text ? View to Plain Text.
22. In body field paste the syntax that given below.

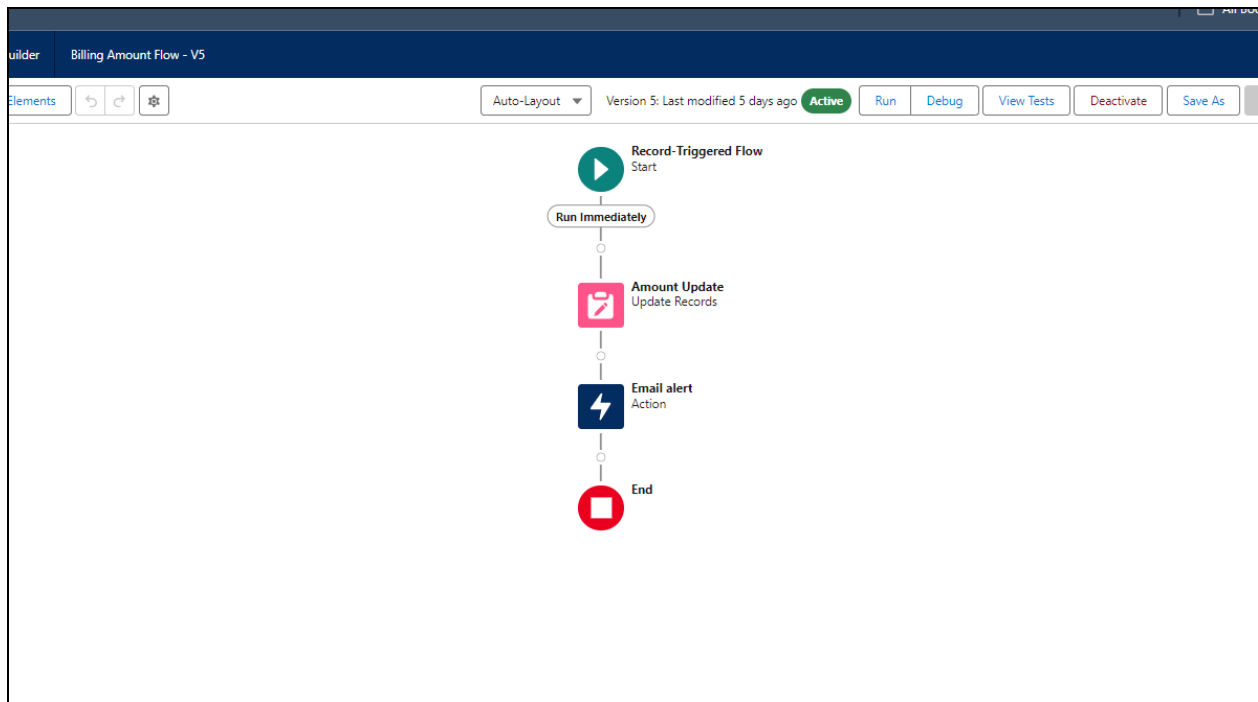
Dear {!\$Record.Service_records__r.Appointment__r.Customer_Name__r.Name},

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 .

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

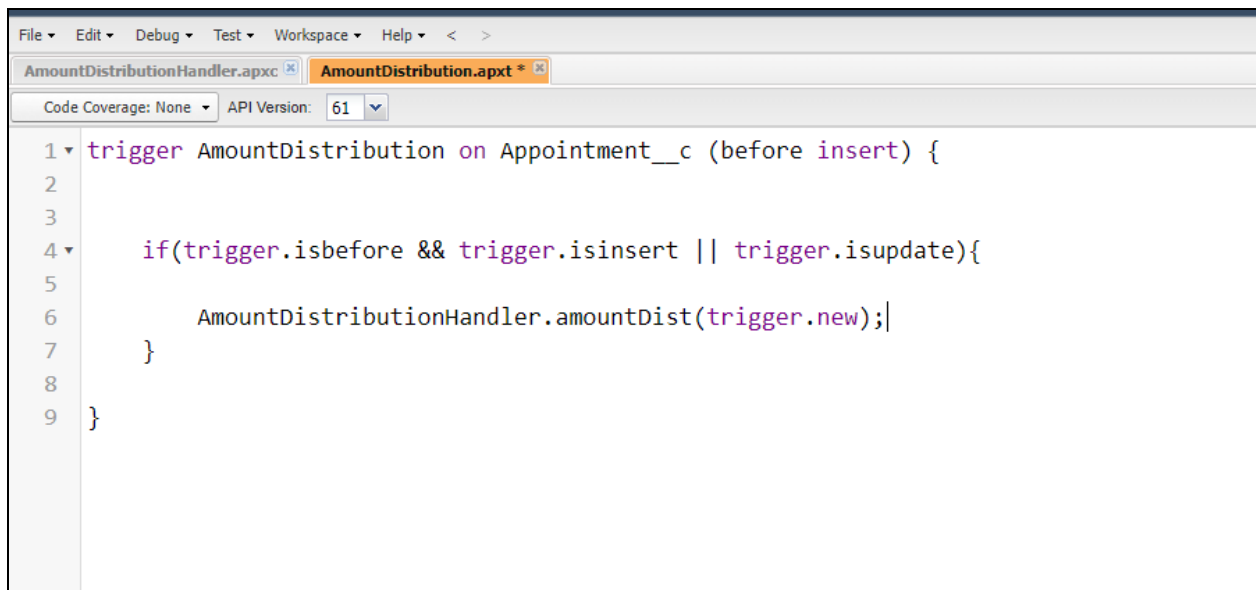


Apex Trigger

Trigger Handler :

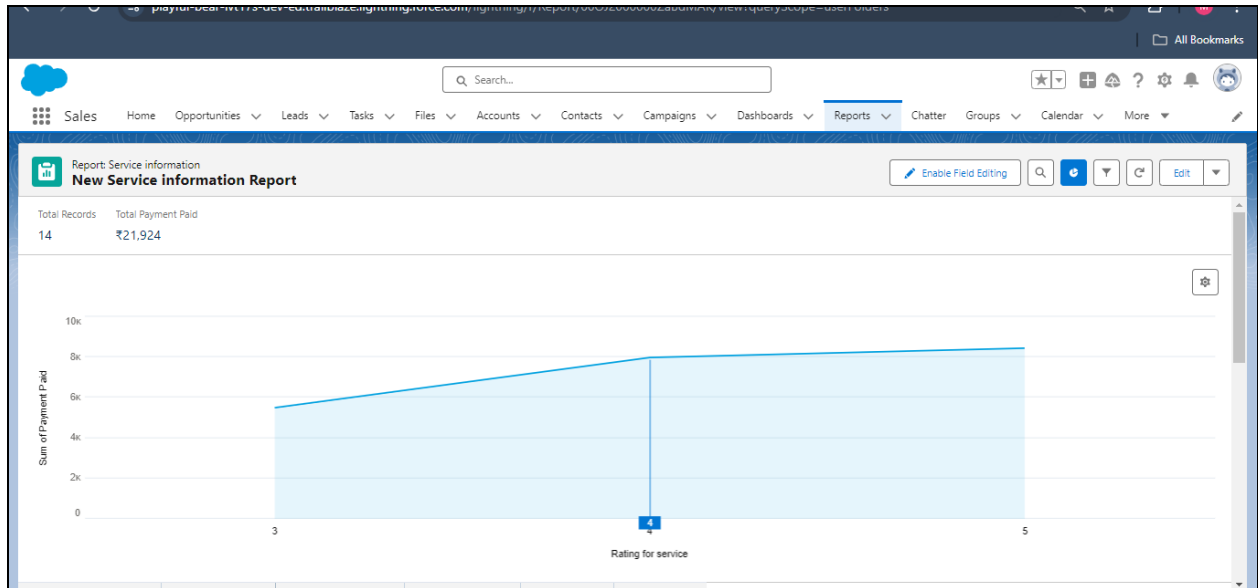
How to create a new trigger :

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

A screenshot of the Salesforce Developer Console. The interface shows a menu bar at the top with options: File, Edit, Debug, Test, Workspace, and Help. Below the menu bar, there are two tabs: 'AmountDistributionHandler.apxc' and 'AmountDistribution.apxt'. The 'AmountDistribution.apxt' tab is active. Below the tabs, there is a status bar showing 'Code Coverage: None' and 'API Version: 61'. The main area of the console displays the following Apex code:

```
1 trigger AmountDistribution on Appointment__c (before insert) {  
2  
3  
4     if(trigger.isbefore && trigger.isinsert || trigger.isupdate){  
5  
6         AmountDistributionHandler.amountDist(trigger.new);  
7     }  
8  
9 }
```


Reports



Report: Service information
New Service information Report

Rating for service

<input type="checkbox"/> Rating for service ↑	<input type="checkbox"/> Payment Status ↑	<input type="checkbox"/> Customer Name	<input type="checkbox"/> Appointment Date	<input type="checkbox"/> Service Status	<input type="checkbox"/> Payment Paid
<input type="checkbox"/> 3 (2)	Completed (2)	Hania	23/08/2024	Completed	₹500
		Muskan Lodhi	31/08/2024	Completed	₹4,999
	Subtotal				₹5,499
Subtotal					₹5,499
<input type="checkbox"/> 4 (5)	Pending (3)	Manvendra Singh	07/08/2024	Completed	₹4,999
		Eva	22/08/2024	Completed	₹299
		Arfa	27/08/2024	Completed	₹899
	Subtotal				₹6,197
	Completed (2)	Unaiza	31/08/2024	Completed	₹788
		salesforce	15/08/2024	Completed	₹999
	Subtotal				₹1,787
Subtotal					₹7,984
<input type="checkbox"/> 5 (7)	Completed (7)	Arshi	23/08/2024	Completed	₹1,700
		Neha	15/08/2024	Completed	₹999
		MOHAMMAD RAYEEN	21/08/2024	Completed	₹599

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.
3. Select add component.
4. Select a Report and click on select.
5. Select the Line Chart. Change the theme.
6. Click Add then click on Save and then click on Done.
7. Preview is shown below.
8. After that Click on Subscribe on top right.
9. Set the Frequency as “ weekly ”.
10. Set a day as monday.
11. And Click on save.

