

GARAGE MANAGEMENT SYSTEM

COLLEGE: AYYAN THIRUVALLUVAR COLLEGE OF ARTS AND SCIENCE

CODE:BRU4M

TEAM ID: NM2025TMID27918

TEAM SIZE:4

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Title:- Garage Management System

Using Salesforce...

Project Overview :

The Garage Management System (GMS) is a software solution designed to streamline and automate the daily operations of an automobile garage or service center. Traditionally, garages rely on manual processes such as paper records, handwritten job cards, and verbal communication, which often lead to inefficiency, delays, and errors. This system addresses these challenges by providing a centralized digital platform that manages customer details, vehicle information, service records, spare parts inventory, billing, and reporting.

The system allows garage owners and staff to track service jobs from booking to completion, manage mechanics' assignments, and ensure efficient use of resources. Customers benefit from timely updates, accurate billing, and improved service quality, while garage owners gain insights into business performance through detailed reports and analytics.

By automating critical processes such as job scheduling, invoicing, and stock management, the GMS reduces paperwork, saves time, and minimizes human error. Ultimately, the project aims to increase operational efficiency, enhance customer satisfaction, and boost overall profitability of the garage.

Objectives :

1. Customer & Vehicle Management

- Maintain detailed records of customers and their vehicles (e.g., make, model, registration, service history).
- Enable quick retrieval of customer details for future service or repairs.

2. Service & Repair Management

- Schedule, track, and manage vehicle services and repair jobs.
- Assign jobs to mechanics/technicians and monitor progress.
- Generate job cards and service histories automatically.

3. Inventory & Spare Parts Management

- Track stock levels of spare parts and consumables.
- Automate purchase orders for low-stock items.
- Reduce delays caused by unavailable parts.

4. Billing & Invoicing

- Generate accurate service estimates, invoices, and receipts.
- Support multiple payment modes (cash, card, online).
- Apply discounts, taxes, and warranties systematically.

5. Reporting & Analytics

- Provide insights on garage performance (e.g., daily revenue, service frequency, part usage).
- Help owners make data-driven decisions for efficiency and profitability.

6. Workforce Management

- Assign tasks to mechanics and track labor hours.
- Monitor productivity and performance.

7. Customer Communication & Retention

- Send reminders for upcoming services or pending bills.
- Provide updates via SMS/email on job progress.
- Improve customer loyalty through timely follow-ups.

8. Automation & Efficiency

- Reduce paperwork and manual errors.
- Save time by automating repetitive administrative tasks.
- Ensure smooth workflow from job booking to completion.

Student Outcomes :

By completing the Garage Management System project, students will be able to:

1. Technical Skills

- Apply database management concepts to design and implement a relational database for customers, vehicles, services, and inventory.
- Develop a functional software application using appropriate programming languages, frameworks, and tools.
- Integrate modules such as job scheduling, billing, inventory tracking, and reporting into a unified system.

2. Problem-Solving Abilities

- Analyze real-world challenges faced by automobile garages and propose digital solutions.
- Translate business requirements into technical specifications.
- Optimize workflows to reduce redundancy and improve efficiency.

3. Project Management & Teamwork

- Collaborate in a team to divide tasks, coordinate development, and ensure timely completion.
- Apply project management practices like planning, documentation, and version control.

4. Analytical & Critical Thinking

- Evaluate system performance through testing and debugging.
- Assess the effectiveness of the system in improving garage operations.
- Draw insights from generated reports to support decision-making.

5. Professional & Communication Skills

- Prepare project documentation (objectives, overview, design, implementation, testing, outcomes).
- Present the project effectively to both technical and non-technical audiences.
- Demonstrate awareness of customer-centric software development.

System Requirements :

Hardware Requirements:

- * Computer with min/sum 4 GB RAM, Dual-core processor
- * Stable internet connection

Software Requirements:

- * Salesforce Developer Edition Org

* Modern Web Browser (e.g., Google Chrome, Firefox)

Project Duration :

31 Hours

Phases Overview :

Phase No.

Phase Name Description Page Numbers

1 Requirement

Analysis & Planning

Gathering requirements from
donors, volunteers, and receivers;
defining scope and goals; planning
data model and workflows.

2 Salesforce

Development –

Backend &

Configurations

Creating custom objects, fields,
relationships; setting up Flows
and Apex Triggers for
automation.

4 - 11

3 UI/UX Development

& Customization

Building Lightning App,
customizing layouts, adding fields,
implementing Flows, and

developing UI logic.

11 - 28

4 Data Migration,

Testing & Security

Creating Users, Profiles, Public

Groups, Sharing Rules;

configuring Report Types, Reports, Dashboards; testing functionalities and ensuring data security.

28 - 37

5 Deployment,

Documentation &

Maintenance

Designing and finalizing Home

Page, deploying solution to live

environment, preparing

documentation, conclusion, and

ongoing system maintenance.

37 – 40

Phase 1: Requirement Analysis & Planning:-

Garage Management System

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

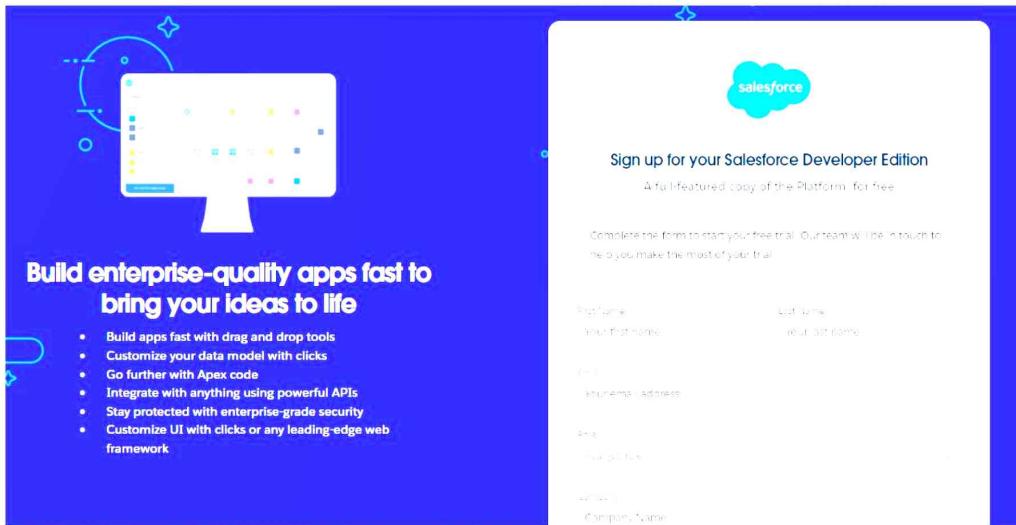
Phase 2: Salesforce Development – Backend & Configurations:-

Milestone 1: Salesforce developer account creation

Activity 1: Creating Developer Account

Creating a developer org in salesforce.

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



1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

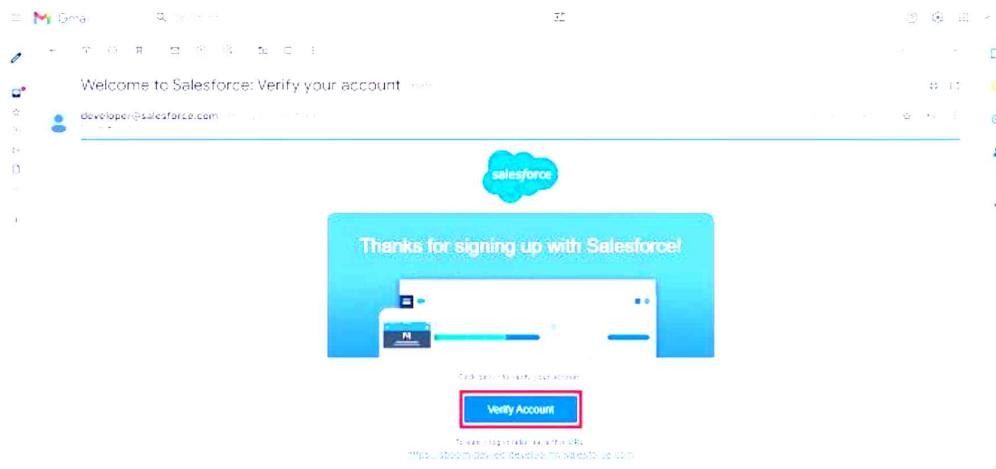
This need not be an actual email id, you can give anything in the format :

username@organization.com

Click on sign me up after filling these.

Activity 2: Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



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

Change Your Password

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

- 8 characters
- 1 letter
- 1 number

New Password
.....

Confirm New Password
.....

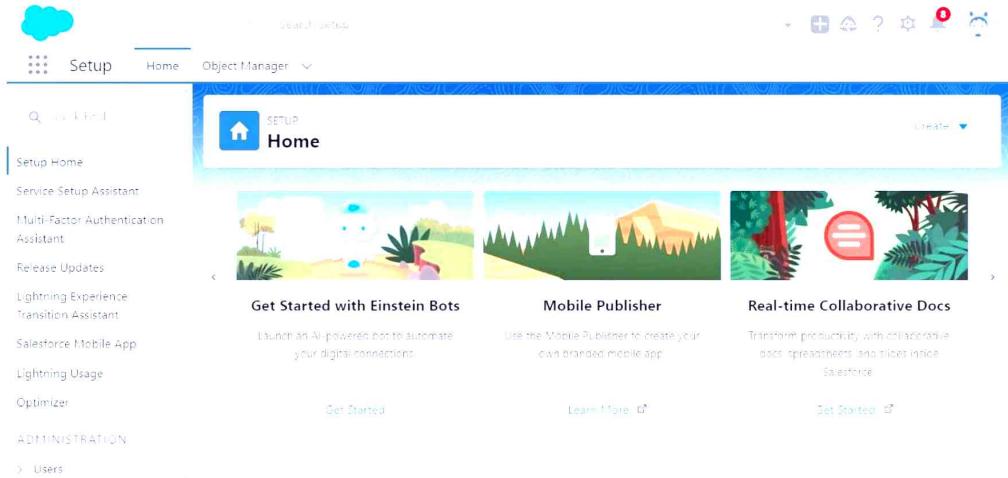
Security Question
In what city were you born?

Answer
asdgfghijkl

Change Password

A form for changing a password. It includes fields for "New Password" and "Confirm New Password", both containing placeholder dots. Below these is a "Security Question" field with the question "In what city were you born?". Underneath is an "Answer" field containing the text "asdgfghijkl". At the bottom is a large blue "Change Password" button.

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



Milestone 2: Object

What Is an 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:

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.

To Navigate to Setup page:

Click on gear icon ? click setup.



To create an object:

3. From the setup page ? Click on Object Manager ? Click on Create ? Click on Custom Object.



4. On Custom object defining page:

5. Enter the label name, plural label name, click on Allow reports, Allow search.

New Custom Object

Custom Object Definition Edit

Custom Object Information

The label for this custom object is:

Label: Example

The plural label for this custom object is:

Plural Label: Examples

Object Description

Object Name

Object Type

Object Status

Object Classification

Object Creation Options

Object Features

Optional Features

Allow Reports

Allow Search

Allow Reports & Search

Allow Reports & Search & Access

Deployment Status

Development

Test

Search Status

Indexable

Object Creation Options (Available only when custom object is first created)

Add to New Item

Add to Existing Item

Add to Existing Item (with Create New Record)

Save

6. Click on Save.

Activity 1: Create Customer Details 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 >> 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.

Activity 2: 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.

Activity 3: 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

Activity 4: 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.

Milestone 3: Tabs

What is Tab : 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. Web tabs make it easier for your users to quickly access content and applications they frequently use without leaving the salesforce.com application.

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.

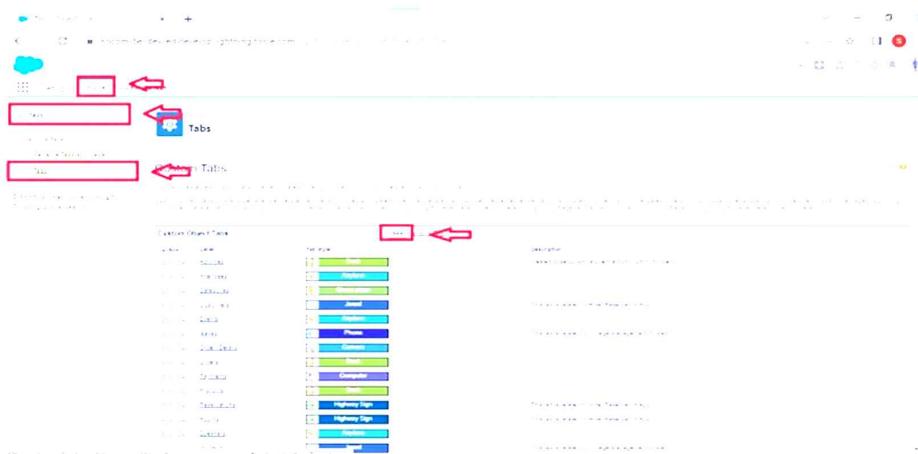
5. Lightning Page Tabs

Lightning Page Tabs let you add Lightning Pages to the mobile app navigation menu. Lightning Page tabs don't work like other custom tabs. Once created, they don't show up on the All Tabs page when you click the Plus icon that appears to the right of your current tabs. Lightning Page tabs also don't show up in the Available Tabs list when you customise the tabs for your apps.

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

New Custom Object Tab

Step 1: Set object details

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

Object: Customer Details

Tab Style: [Color]

Optional: choose a Home Page Custom Link to show as a splash page the first time your users click on the tab.

Splash Page Custom Link: None

Enter a short description

Description:

Next Step 2

Tab Style Selector		Create your own style			
Hide styles which are used on other tabs					
	Airplane		Alarm clock		Apple
	Bank[1]		Bell		Big top
	Books		Bottle		Box
	Building		Building Block		Caduceus
	Can		Car		Castle
	Cell phone		Chalkboard		Chess piece
	Circle		Compass		Computer
	CRT TV		Cup		Desk[1]
	Dice		Factory		Fan
	Form		Gears		Globe
	Hammer		Hands		Handsaw
	Heart[1]		Helicopter		Hologram
	Hot Air Balloon		Insect		IP Phone
	Keys		Laptop		Leaf
Save Cancel					

Step 2: Add to Custom App

Choose the custom app to which the new custom tab will be visible. You may also choose to skip the addition of tabs from the detailed edit pages of each Custom App.

Custom App		Include Tab
Platform (Standard_Platform)		
Service (Standard_Service)		
Service (Standard_Service)		
Marketing (Standard_Marketing)		
Sample Console (Standard_ServiceProvider)		
High Volume Customer Portal User		
Authenticated Website User		
App Launcher (Standard_Application)		



Activity 2: Creating Remaining Tabs

1. Now create the Tabs for the remaining Objects, they are “ Appointments, Service records,Billing details and feedback”.
2. Follow the same steps as mentioned in Activity -1 .

Milestone 4: The Lightning App

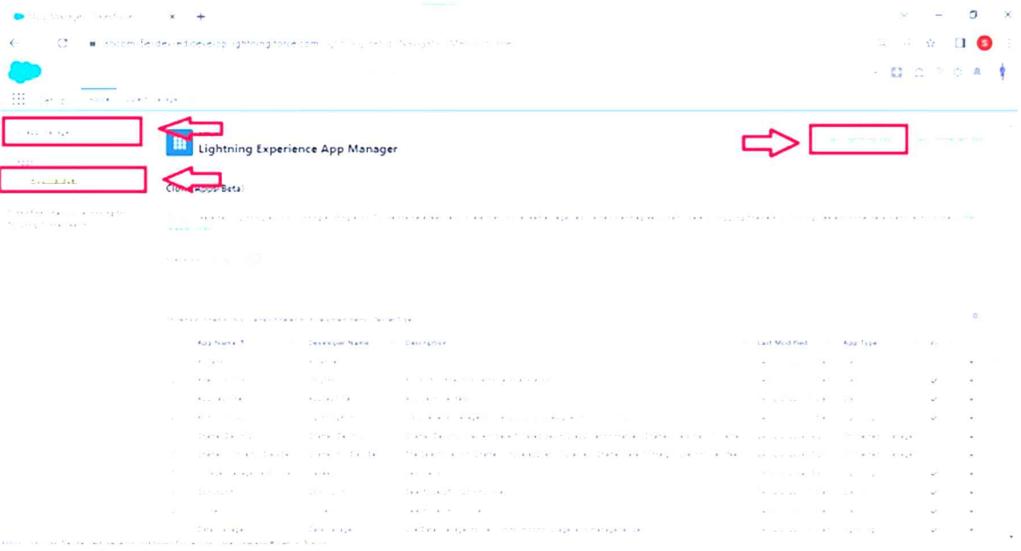
An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar.

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. Members of your org can work more efficiently by easily switching between apps.

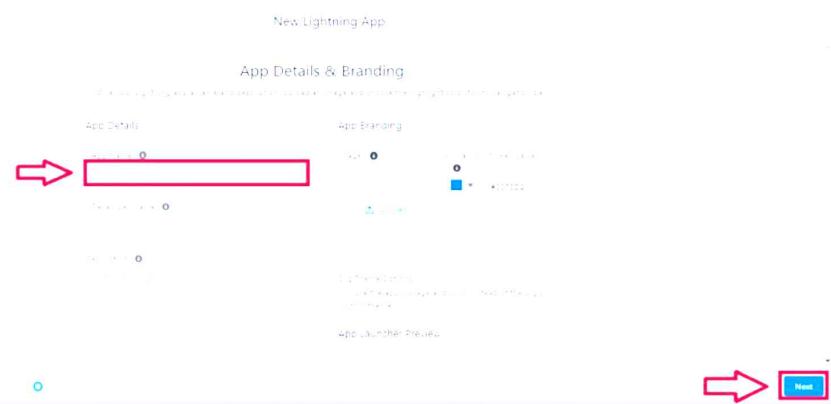
Activity 1: Create a Lightning App

To create a lightning app page:

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



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:



- Select the items (Customer Details, Appointments, Service records, Billing details and feedback, Reports and Dashboards) from the search bar and move it using the arrow button >> Next.
- To Add User Profiles:



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

Milestone 5: 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

- Standard Fields
- 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. Otherwise, users have the option to delete them at any point from the application freely. 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. Moreover, each organiser or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

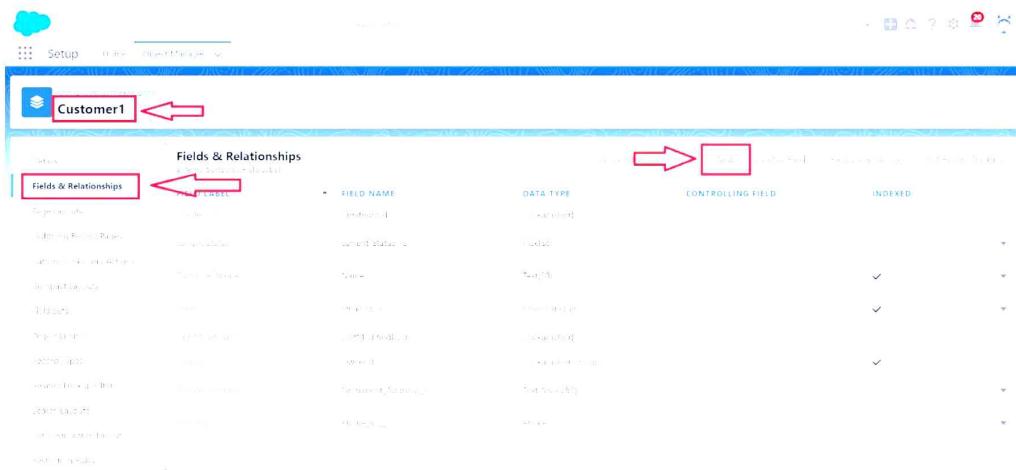
Activity 1: Creation of fields for the Customer Details object

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.



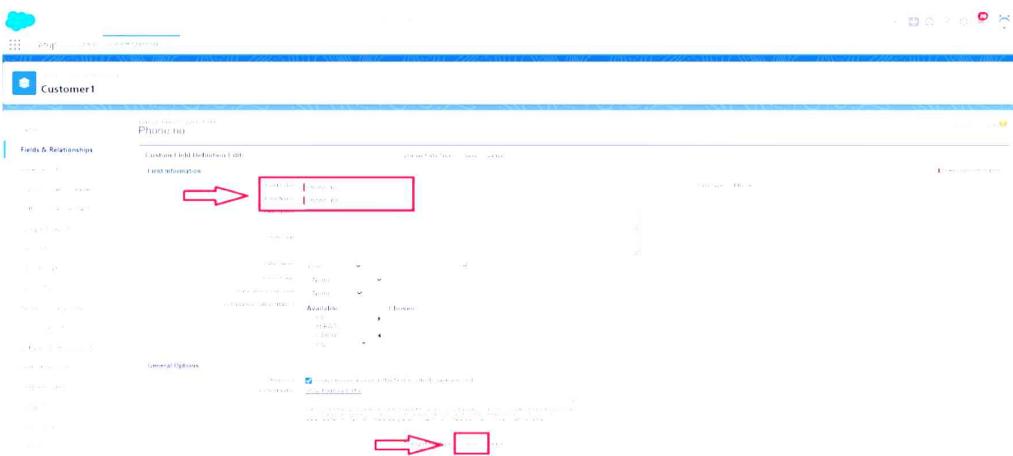
2. Now click on “Fields & Relationships” >> New



3. Select Data Type as a “Phone”



4. Click on next.



5. Fill the Above as following:

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

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

2. To create another fields in an object:

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

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

Activity 2: Creation of Lookup Fields

Creation of Lookup Field on Appointment Object :

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

The screenshot shows the Salesforce Object Manager interface. The top navigation bar has 'Setup' selected. Below it, the 'Object Manager' section is open, showing the 'Appointment' object. The table lists fields such as 'Last Name', 'First Name', 'Last Activity Date', and 'Last Activity Type'. The 'Last Modified' and 'Deployed' columns are also visible.

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

The screenshot shows the 'Fields & Relationships' section of the Appointment object's setup. It lists existing fields like 'Last Name' and 'First Name'. A new field is being created, with the 'FIELD NAME' set to 'Customer Details' and the 'DATA TYPE' set to 'Lookup'. The 'CONTROLLING FIELD' and 'INDEXED' options are also visible.

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

This screenshot shows the 'Data Type' selection step in the field creation wizard. The 'Lookup Relationship' option is selected, indicated by a red circle. Other options like 'Text', 'Text (Rich)', 'Text Area', 'Text Area (Rich)', 'Text (HTML)', 'Text (Rich) (HTML)', 'Text (HTML) (Rich)', 'Text Area (HTML)', and 'Text Area (Rich) (HTML)' are shown but not selected. A note at the bottom says 'Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The other object is the source of the values in the list.' A 'Next >' button is visible at the bottom right.

4. Select the related object “Customer Details” and click next.
5. Next >> Next >> Save.

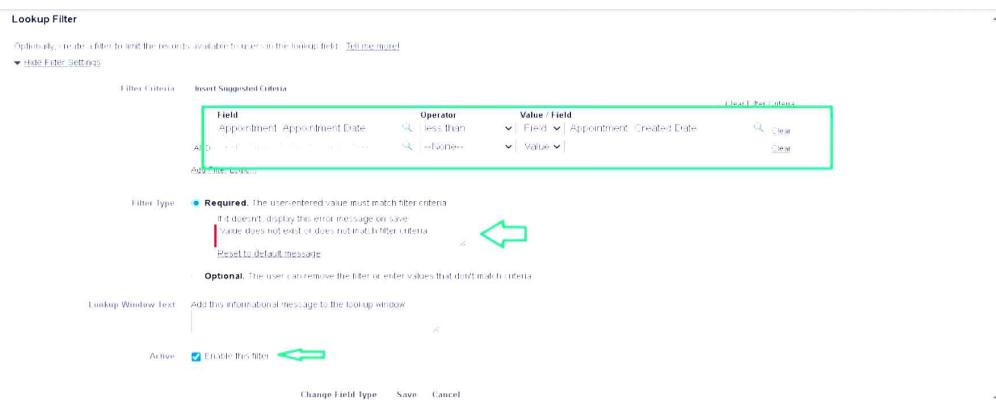
Note: Make sure you complete Activity 4 Before continuing.

Creation of Lookup Field on Service records Object :

1. Go to setup >> click on Object Manager >> type object name(Service records) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select “Look-up relationship” as data type and click Next.
4. Select the related object “ Appointment ” and click next.
5. Make it a required field so click on Required.



6. Scroll down for Lookup Filter and click on Show filter settings.
7. Now add the filter criteria.
8. Field : Appointment: Appointment Date >> Operator : less than >> select field >> Appointment: Created Date
9. Filter type should be Required.



10. Error Message : Value does not match the criteria.
11. Enable the filter by click on Active.
12. Next >> Next >> Save.

Creation of Lookup Field on Billing details and feedback Object :

1. Go to setup >> click on Object Manager >> type object name(Billing details and feedback) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select “Look-up relationship” as data type and click Next.
4. Select the related object “ Service records ” and click next.
5. Next >> Next >> Save & new.

Activity 3: Creation of Checkbox Fields

Creation of Checkbox Field on Appointment Object :

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



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



7. Click on next >> next >> save.

Creation of Another Checkbox Field on Appointment Object :

1. Repeat the steps form 1 to 3.
2. Give the Field Label : Repairs
3. Field Nme : is auto populated
4. Default value : unchecked
5. Click on next >> next >> save.
6. Follow the same and create another checkbox with given names

7. Give the Field Label : Replacement Parts
8. Field Nme : is auto populated
9. Default value : unchecked
10. Click on next >> next >> save.

Creation of Checkbox Field on Service records Object :

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

Activity 4: Creation of date Fields

Creation of Date Field on Appointment Object :

1. Go to setup >> click on Object Manager >> type object name(Appointment) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select “Date” as data type and click Next.
4. Give the Field Label : Appointment Date
5. Field Nme : is auto populated
6. Make it as a Required field by click on the Required option.
7. Click on next >> next >> save.

Appointment
New Custom Field

Step 2: Define the details Step 3 of 4

Previous Next

Field Label	Appointment Date
Field Name	appointment_date
Description	
Help Text	
Required	<input checked="" type="checkbox"/> Make this required for all fields in this object
Auto add to custom report type	<input checked="" type="checkbox"/> Add this field to every custom report type that contains this object
Default Value	None Formula Editor

Activity 5: Creation of Currency Fields

Creation of Currency Field on Appointment Object :

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

Step 2: Create field details

Field Label: Service Amount

Please enter the length of the number and the number of decimal places. For example, a number with a length of 15 and 2 decimal places can be displayed as "12345.6789".

Length:	15	Decimal Places:	2
Field Name:	Service_Amount	Description:	Number of digits to the left of the decimal point.
Help Text:	A value is required in this field in order to save a record.		
Required:	<input checked="" type="checkbox"/> Add this field to custom report types that contain this entity.		
Auto add to custom report type:	<input checked="" type="checkbox"/>		

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

Step 3: Set field-level security

Appointment
New Custom Field

Field Label: Service Amount
Data Type: Currency
Field Name: Service_Amount
Description:

Select the profile(s) whom you want to grant read access to the field at field-level security. The field will be hidden from the profile if you do not grant it field-level security.

Field Level Security for Profile	Visible	Read Only
Appointment Object Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Appointment Record Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Appointment Standard Object	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Appointment Standard Object	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Object Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
System Admin Profile	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

8. Click on next >> save.

Creation of Currency Field on Billing details and feedback Object :

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

Activity 6: Creation of Text Fields

1. Go to setup >> click on Object Manager >> type object name(Appointment) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select “Text” as data type and click Next.
4. Give the Field Label : Vehicle number plate
5. Field Name : is auto populated
6. Length :10
7. Make field as Required and Unique.

8. Click on next >> next >> save.

Creation of Text Fields in Billing details and feedback object :

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

Activity 7: Creation of Picklist Fields

Creation of Picklist Fields in Service records object :

1. Go to setup >> click on Object Manager >> type object name(Service records) in search bar >> click on the object.
2. Click on fields & relationship >> click on New.
3. Select Data type as “Picklist” and click Next.

- Enter Field Label as "Service Status", under values select "Enter values, with each value separated by a new line" and enter values as shown below.
- The values are: Started, Completed.

New Custom Field

Step 2: Enter the details Step 3 of 4

Previous Next Save

Field Label: Service Status

Values:

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

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:

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

Creation of Picklist Fields in Billing details and feedback object :

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

Activity 8: Creating Formula Field in Service records Object

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

Step 2: Choose output type

Field Label: **Created Date** Field Name: **Created Date**

Auto add to custom report type Add this field to the custom report type that contains the report.

Formula Return Type

None Selected

DateTime

Boolean

Currency

Date **Created Date**

Time

Select one of the data types below:

Example: A timestamp value.
Example: 1000000000000000000

Calculate a date or other currency amount and automatically format the field as a currency amount.
Example: 1000000000000000000 + 1000000000000000000

Calculate a date by adding or subtracting days to another date.
Example: Previous(Now(), -1) + 1000000000000000000

Add or subtract a datetime. For example, by adding a number of hours or days to another datetime.
Example: Now() + 1000000000000000000

5. Insert field formula should be : Created Date

Insert Field

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

Service records > Appointment
 \$Api >
 \$Label >
 \$Organization >
 \$Profile >
 \$System >
 \$User >
 \$UserRole >

Appointment >
 Created By >
 Created By ID
Created Date
 Last Activity Date
 Last Modified By >
 Last Modified By ID
 Last Modified Date

You have selected:
Created Date
 Type: DateTime
 API Name: CreatedDate

Insert

Close

Step 3: Enter formula

Enter a formula and click Check Syntax to check for errors. Click the Advanced Formula button to use addition, subtraction, multiplication, division, and modulus.

Example: `CreatedDate < CurrentDate` | More Examples...

Simple Formula **Advanced Formula**

Insert Field: `service_date (Date) = Created Date`

Insert Operator: **<**

Functions: **Editor Function Categories**
 ABS
 PI()
 ALLOWED(HS)
 AND
 ANDALL

Quick Tips: **With Operator** **Operators & Functions**

6. click "Check Syntax".

7. Click next >> next >> Save.

Milestone 6: 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. If the criteria are not met, the validation rule triggers an error message and prevents the user from saving the record until the issues are resolved.

Activity 1: To create a validation rule to an Appointment Object

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

The screenshot shows the 'Appointment' object's validation rules list. The 'Validation Rules' section is highlighted with a green box. The columns include Rule Name, Error Location, Error Message, Active, and Modified By. There are 10 validation rules listed, and the 'Validation Rules' section header is also highlighted with a green box.

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

The screenshot shows the 'Validation Rule Edit' page for the 'Vehicle' rule. The 'Rule Name' is set to 'Vehicle', 'Active' is checked, and the 'Description' is 'vehicle'. In the 'Error Condition Formula' section, the formula 'NOT(REGEX(Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))' is entered. The 'Error Condition Formula' field is highlighted with a green box. A tooltip for the 'ABS' function is visible on the right.

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.



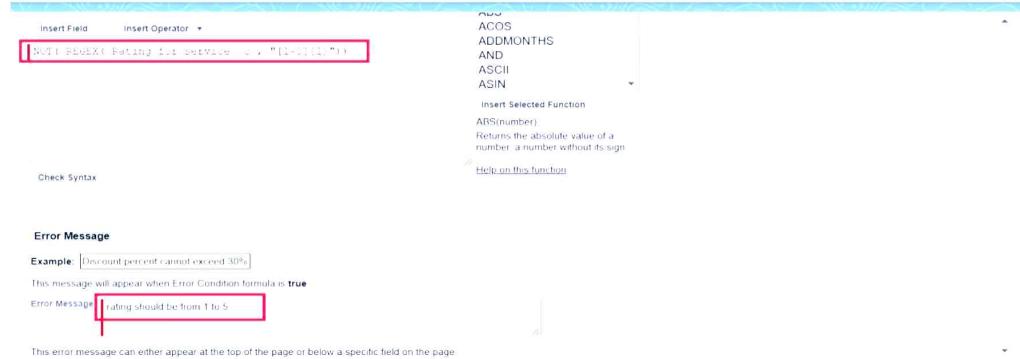
Activity 2: To create a validation rule to an Billing details and feedback Object

1. Go to the setup page >> click on object manager >> From drop down click edit for Billing details and feedback object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as “ rating_should_be_less_than_5”.
4. Insert the Error Condition Formula as :-

`NOT(REGEX(Rating_for_service__c , "[1-5]{1}"))`



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.

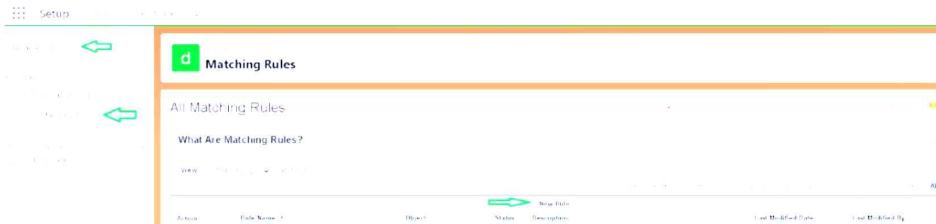


Milestone 7: Duplicate rule

Activity 1: 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

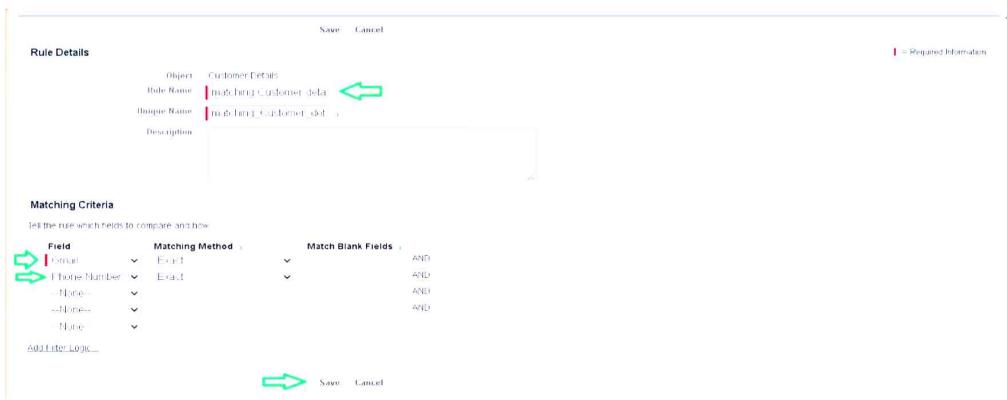
Matching Method

1. Gmail

2. Phone Number

8. Click save.

9. After Saving Click on Activate.



Matching Rule		matching Customer details				Delete	
Matching Rule Detail		Edit		Delete		Clone	
Object	Customer Details						
Rule Name	matching customer details						
Unique Name	matching_customer_details						
Description							
Matching Criteria	Exact values, contains, starts with, ends with, like, contains backslash, regular expression, matches, matches ignore case, matches ignore case, like, ignore case						
Status	Inactive						
Created By	project 2 (268-962023) 10-15-2023					Modified By	project 2 (30956203) 11-12 pm

Activity 2: 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.

[Edit Duplicate Rule](#)

Customer Detail duplicate

[Edit Form Step](#)

Duplicate Rule Edit
Save
Save & New
Cancel

Rule Details ! = Required Information

Role Name:	<input type="text" value="Customer Detail duplicate"/>
Description:	<input type="text" value="Customer Detail"/>
Object:	Customer Detail
Record Level Security:	<input checked="" type="radio"/> Enable sharing rules <input type="radio"/> Disable sharing rules

Actions

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

Action On Create:	<input type="checkbox"/> Allow <input checked="" type="checkbox"/> Alert <input type="checkbox"/> Report
Action On Edit:	<input type="checkbox"/> Allow <input checked="" type="checkbox"/> Alert <input type="checkbox"/> Report
Alert Text:	<input type="text" value="No one or more records"/>

Milestone 8: Profiles

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

Types of profiles in salesforce

1. Standard profiles:

By default salesforce provides below standard profiles.

- Contract Manager
- Read Only
- Marketing User
- Solutions Manager
- Standard User
- System Administrator.

We cannot deleted standard ones

Each of these standard ones includes a default set of permissions for all of the standard objects available on the platform.

2. Custom Profiles:

Custom ones defined by us.

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

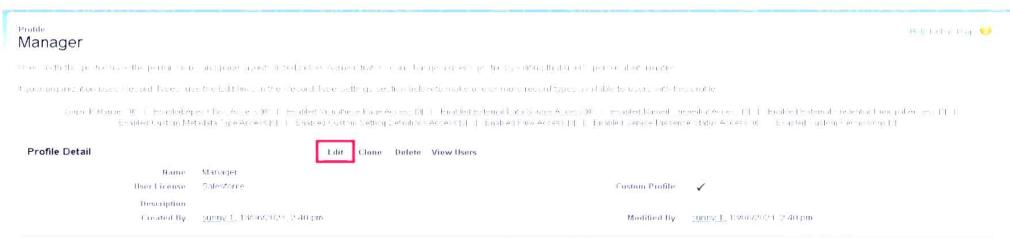
Activity 1: Manager Profile

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.



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



standard - Service Standard
Service Standard - Service
standard - Customer
standard - Lightning Service
Site.com Standard - Sales

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.

Activity 2: 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						
	Read	Create	Edit	Delete	View All	Modify All
Appointments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Billing details and feedback	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Environments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Laptops	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service records	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
NewandData	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. And click save.

Milestone 9: 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.

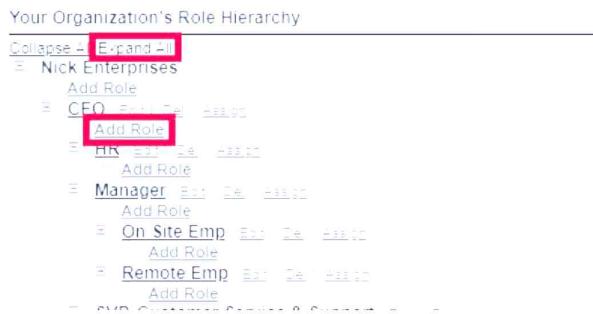
Activity 1: Creating Manager Role

Creating Manager Role:

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

The screenshot shows the Salesforce Setup Roles page. The left sidebar has 'Feature Settings' expanded, with 'Roles' selected. The main content area is titled 'Understanding Roles' with a sub-section 'Sample Rule Hierarchy'. A diagram illustrates a role hierarchy:
Executive Staff (CEO, President, CFO, VP Sales)
International Manager (International Sales Rep, International Service Rep)
Eastern Manager (Eastern Sales Rep, Eastern Service Rep)
Western Manager (Western Sales Rep, Western Service Rep)
The 'Get New Roles' button is visible at the bottom right.

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.

Role Edit

Label: [Edit](#)

Role Name: [Edit](#)

This role reports to: [Edit](#)

(This Name is displayed on reports)

[Save](#) [Save & New](#) [Cancel](#)

Activity 2: Creating another roles

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.

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

- Thesmartbridge**
 - [Add Role](#)
 - CEO** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - CFO** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - COO** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - Manager** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - SVP, Customer Service & Support** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - SVP, Human Resources** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - SVP, Sales & Marketing** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)

Milestone 10: 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. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

Activity 1: Create User

1. Go to setup >> type users in quick find box >> select users >> click New user.
2. Fill in the fields
 - 1. First Name : Niklaus
 - 2. Last Name : Mikaelson
 - 3. Alias : Give a Alias Name
 - 4. Email id : Give your Personal Email id
 - 5. Username : Username should be in this form: text@text.text
 - 6. Nick Name : Give a Nickname
 - 7. Role : Manager
 - 8. User licence : Salesforce
 - 9. Profiles : Manager

3. Save.

Activity 2: Creating another users

1. Repeat the steps and create another user using
 - a. Role : sales person
 - b. User licence : Salesforce Platform
 - c. Profile : sales person

Note : create atleast 3 users with these permissions.

Milestone 11: Public groups

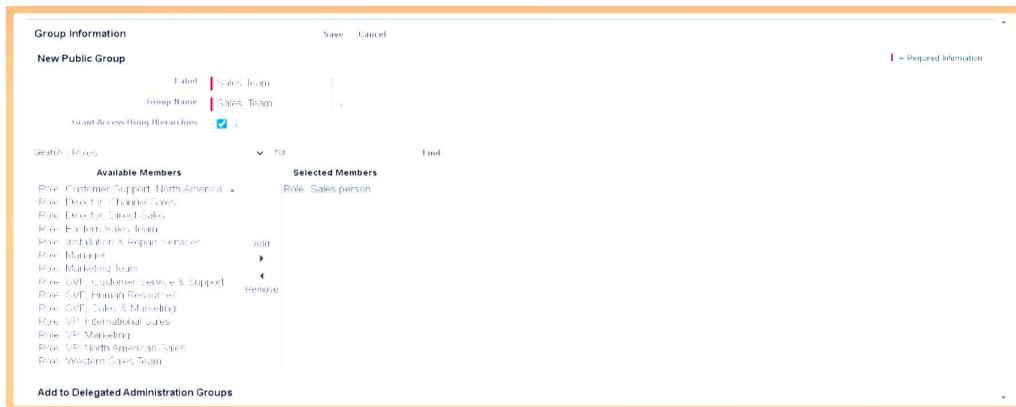
Public groups are a valuable tool for Salesforce administrators and developers to streamline user management, data access, and security settings. By creating and using public groups effectively, you can maintain a secure and organized Salesforce environment while ensuring that users have appropriate access to the resources they need.

Activity 1: 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.



Milestone 12: Sharing Setting

Salesforce allows you to configure sharing settings to control how records are accessed and shared within your organization. These settings are crucial for maintaining data security and privacy. Salesforce provides a variety of tools and mechanisms to define and enforce sharing rules, such as:

Organization-Wide Default (OWD) Settings:

These settings define the default level of access for all objects within your Salesforce org. OWD settings include Private, Public Read-Only, Public Read/Write, and Controlled by Parent.

OWD settings can be configured for each standard and custom object.

Role Hierarchy:

Salesforce uses a role hierarchy to determine record access.

Users at higher levels in the hierarchy have greater access to records owned by or shared with users lower in the hierarchy.

The role hierarchy is often used in combination with OWD settings to grant different levels of access.

Profiles and Permission Sets:

Profiles and permission sets allow administrators to specify object-level and field-level permissions for users.

Profiles are typically used to grant general object and field access, while permission sets can be used to extend those permissions to specific users.

Sharing Rules:

Sharing rules are used to extend access to records for users who meet specific criteria. They can be used to grant read-only or read-write access to records owned by other users.

Manual Sharing:

Administrators and record owners can manually share specific records with other users or groups.

Activity 1: Creating Sharing settings

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

The screenshot shows the 'Sharing Settings' page in Salesforce. Under the 'Service records' section, the 'Object Default sharing' dropdown is set to 'Private'. Other objects like Work Plan Template, Work Step Template, Work Type, Work Type Group, Assignment, Billing Details and Remarks, Customer Details, Environment, Laptop, Session/Debug, and User Visibility Settings remain at their default 'Private' values. At the bottom, there are 'Save' and 'Cancel' buttons.

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



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 " >> " Manager "
10. In step 5 : Change the access level to " Read / write ".
11. Click on save.

Sharing Settings

Step 1: Rule Name

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

Specify records: owned by members of: ← Salesperson ←

Step 4: Select the users to share with

Share with: ← Manager ←

Step 5: Select the level of access for the users

Access Level: ReadWrite ←

← Save Cancel

Milestone 13: Flows

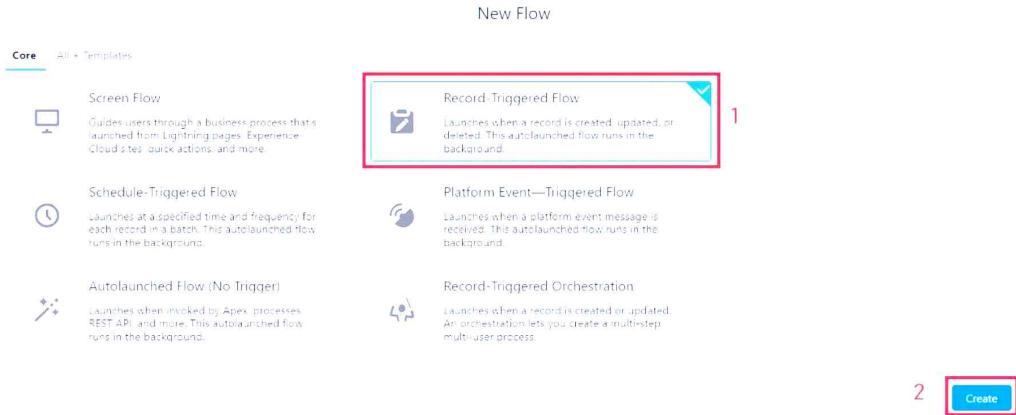
In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

Activity 1: 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.

Select Object

Get the object whose change triggers the workflow record creation, update, or delete.

Billing details and feedback

Configure Trigger

*Trigger the Flow When:

- A record is created
- A record is updated
- A record is created or updated
- A record is deleted

Set Entry Conditions

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

By selecting a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for when to run the flow for updated records.

Optimize the Flow for:

Fast Field Updates

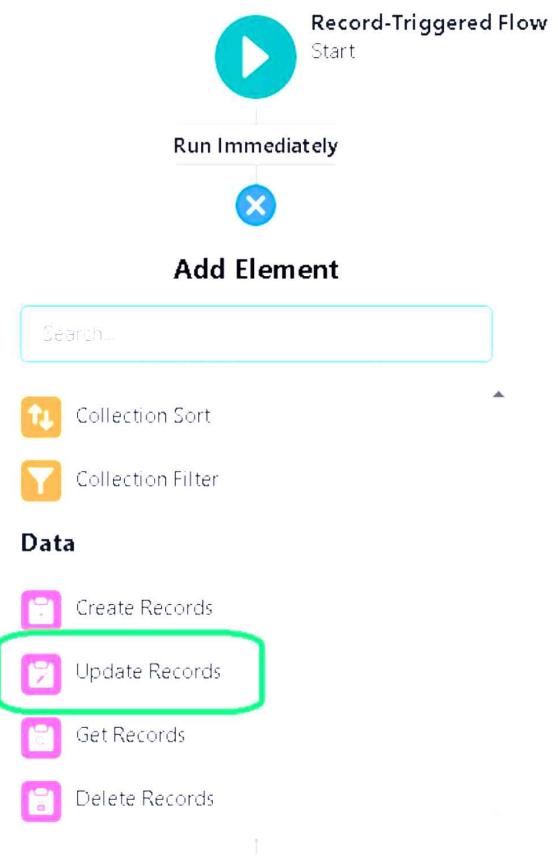
Update fields on the record that triggers the flow to run. This high-performance flow runs before the record is saved to the database.

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

Actions and Related Records

Update any record and perform actions, like send an email. This more flexible flow runs after the record is saved to the database.

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

Edit Update Records

Update Salesforce records using values from the flow.

*Label	*API Name
Amount Update	Amount_Update

Description

***How to Find Records to Update and Set Their Values**

- Use the billing details and feedback record that triggered the flow
- Update records related to the billing details and feedback record that triggered the flow
- Use the IDs and all field values from a record or record collection
- Specify conditions to identify records, and set fields individually

Set Filter Conditions

Condition Requirements to Update Record

All Conditions Are Met (AND)

Set Field Values for the Billing details and feedback Record

Field Value

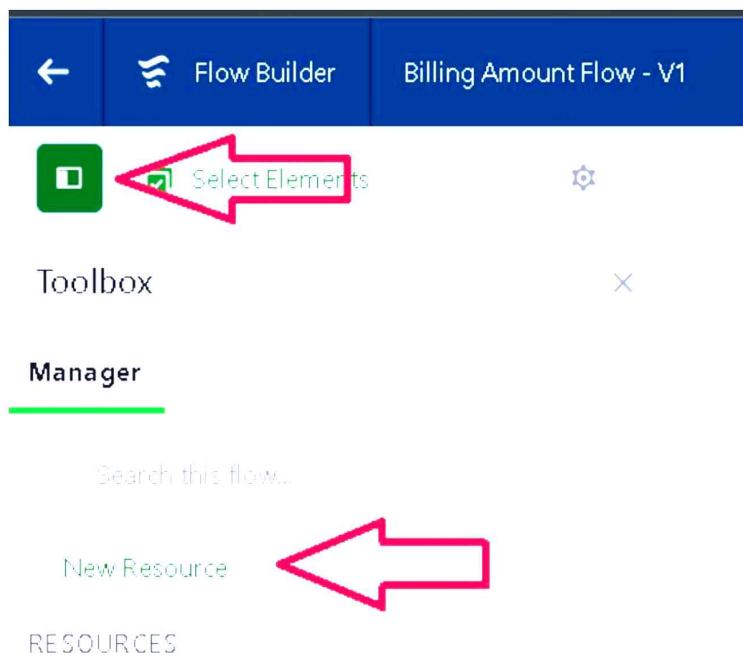
Payment_Paid__c {!\$Record.Service_records__r.Appointment__r.Service_Amount__c}

+ Add Field

Cancel Done

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.

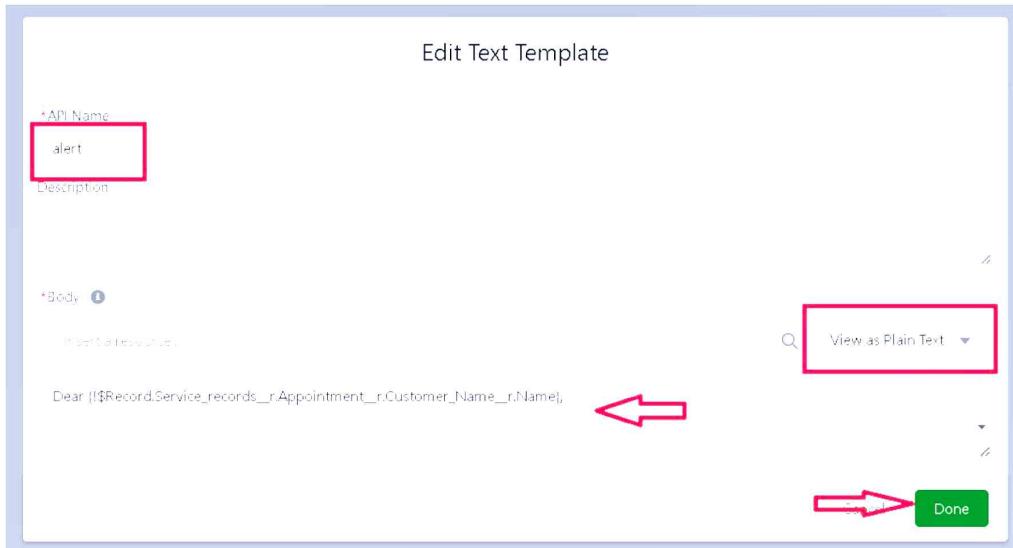
Dear {\$Record.Service_records__r.Appointment__r.Customer_Name__r.Name},

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.

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.

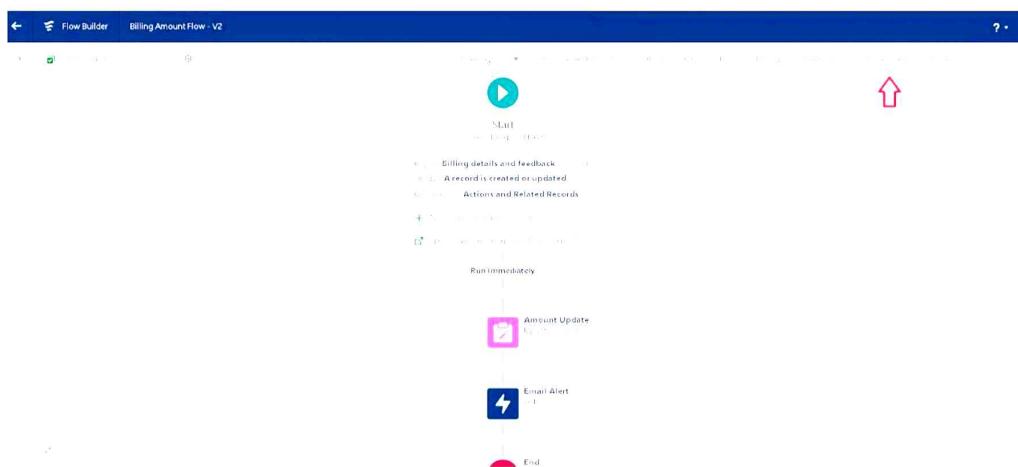
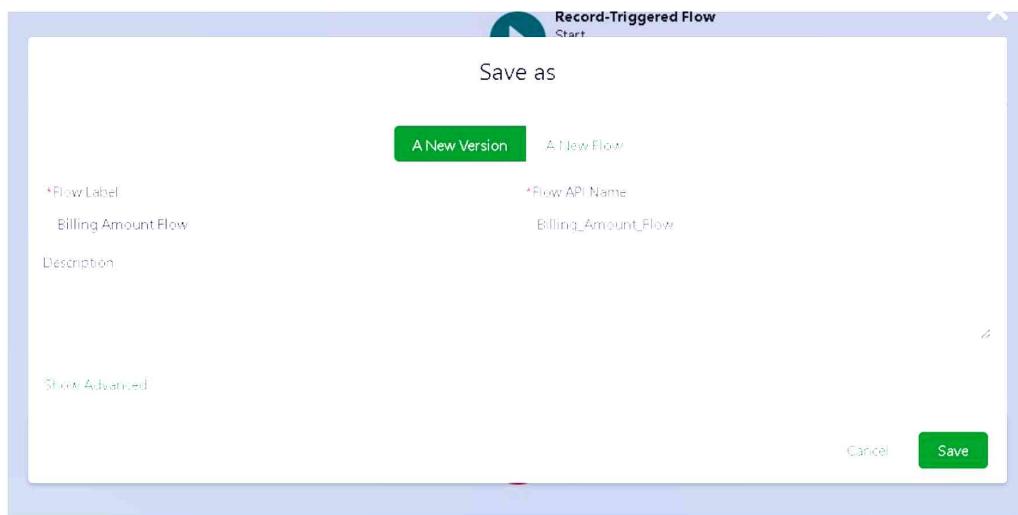
*Label	*API Name						
<input style="border: 2px solid red;" type="text" value="Email Alert"/>	Email_Alert						
Description							
<p>Set Input Values for the Selected Action</p> <table border="0"> <tr> <td>A₁ Body ({!alert})</td> <td><input checked="" type="checkbox"/> Include</td> </tr> <tr> <td>A₂ Email Template ID</td> <td><input type="checkbox"/> Don't include</td> </tr> <tr> <td>O₁ Long Email in Send</td> <td><input type="checkbox"/> Don't include</td> </tr> </table>		A ₁ Body ({!alert})	<input checked="" type="checkbox"/> Include	A ₂ Email Template ID	<input type="checkbox"/> Don't include	O ₁ Long Email in Send	<input type="checkbox"/> Don't include
A ₁ Body ({!alert})	<input checked="" type="checkbox"/> Include						
A ₂ Email Template ID	<input type="checkbox"/> Don't include						
O ₁ Long Email in Send	<input type="checkbox"/> Don't include						

Edit Action

A ₁ Recipient Address List ({!\$RecordService_records__r.Appointment__r.Cus})	<input checked="" type="checkbox"/> Include
A ₂ Recipient ID	<input type="checkbox"/> Don't include
A ₃ Related Record ID	<input type="checkbox"/> Don't include
O ₁ Rich-Text-Formatted Body	<input type="checkbox"/> Don't include
A ₄ Sender Email Address	<input type="checkbox"/> Don't include
A ₅ Sender Type	<input type="checkbox"/> Don't include
A ₆ Subject Thank You for Your Payment - Garage Manageme	<input checked="" type="checkbox"/> Include

Cancel **Done**

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

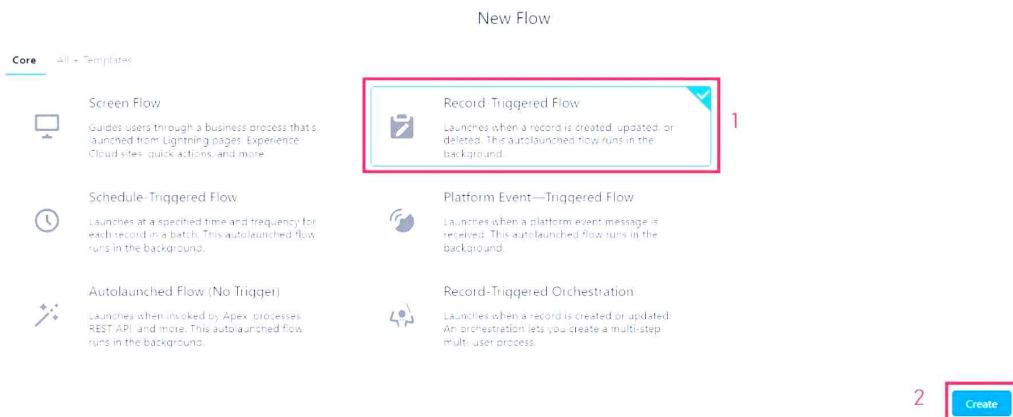


Activity 2: Create another Flow

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 "**Service records**" in the Drop down list.
4. Select the Trigger Flow when: "A record is Created or Updated".
5. Select the Optimise 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. Set a filter condition : All Conditions are met(AND)
8. Field : **Quality_Check_Status__c**
9. Operator : **Equals**
10. Value : **True**
11. And Set Field Values for the Billing details and feedback Record
12. Field : **Service_Status__c**
13. Value : **Completed**

Set Filter Conditions

Condition Requirements to Update Record

All Conditions Are Met (AND) ▾

Field	Operator	Value
Quality_Check_Status__c	Equals	True

+ Add Condition

Set Field Values for the Service record Record

Field	Value
Service_Status__c	Completed

+ Add Field

14. Click On **Done**.

15. Click on **save**

16. Given the Flow label as **Update Service Status** , Flow Api name will be auto populated.

17. And click save, and click on **activate**.

Milestone 14: Apex Trigger

Apex can be invoked by using triggers. Apex triggers enable you to perform customer actions before or after changes to Salesforce records, such as insertions, updates, or deletions.

A trigger is Apex code that executes before or after the following types of operations:

- insert
- update
- delete
- merge
- upsert
- undelete

For example, you can have a trigger run before an object's records are inserted into the database, after records have been deleted, or even after a record is restored from the Recycle Bin.

You can define triggers for top-level standard objects that support triggers, such as a Contact or an Account, some standard child objects, such as a CaseComment, and custom objects. To define a trigger, from the object management settings for the object whose triggers you want to access, go to Triggers.

There are primarily two types of Apex Triggers:

Before Trigger: This type of trigger in Salesforce is used either to update or validate the values of a record before they can be saved into the database. So, basically, the before trigger validates the record first and then saves it. Some criteria or code can be set to check data before it gets ready to be inserted into the database.

After Trigger: This type of trigger in Salesforce is used to access the field values set by the system and affect any change in the record. In other words, the after trigger makes changes to the value from the data inserted in some other record.

Activity 1: Apex handler

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

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

```
File -> Developer Console -> AmountDistributionHandler.apex
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 = 0;
            }
        }
    }
}
```

```

AmountDistributionHandler.cs  AmountDistributionHandler.apxc *
Code Coverage Name: API Version: 59
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;
            }
        }
    }
}

```

```
}
```

```
}
```

```
}
```

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



New Apex Trigger ×

Name:

Submit

Syntax For creating trigger :

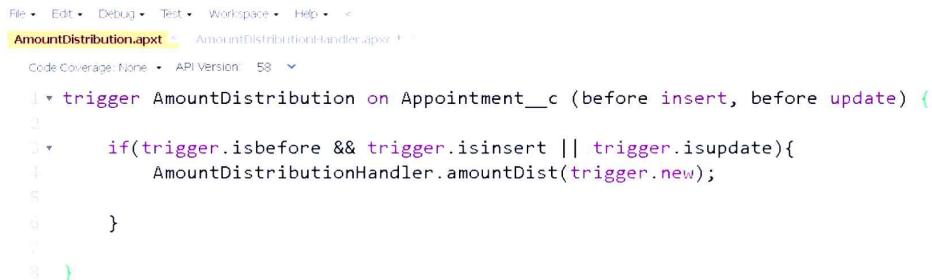
The syntax for creating trigger is :

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

```
}
```

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

1. Handler for the Appointment Object



The screenshot shows a code editor with the following code:

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

Code:

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

    if(trigger.isbefore && trigger.isinsert || trigger.isupdate){
        AmountDistributionHandler.amountDist(trigger.new);

    }
}
```

Milestone 15: Reports

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

Types of Reports in Salesforce

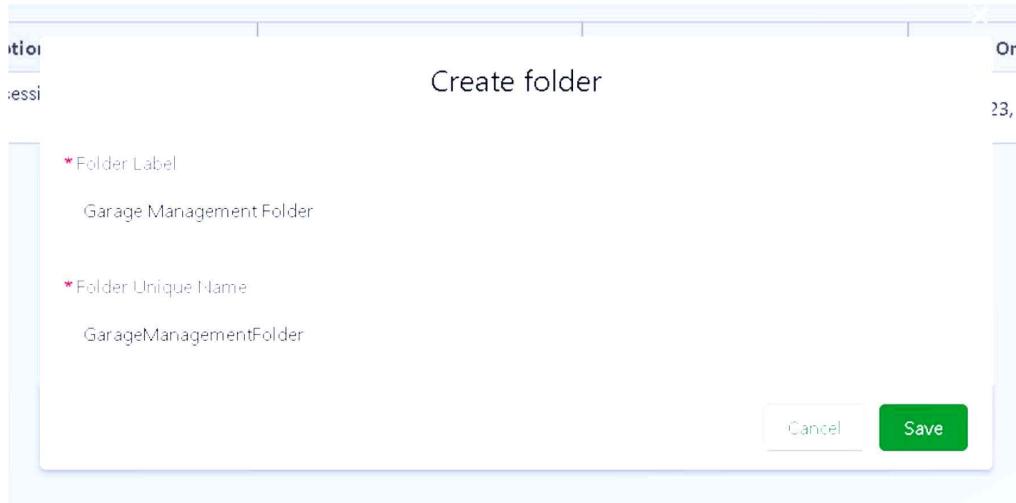
1. Tabular
2. Summary
3. Matrix
4. Joined Reports

Activity 1: Create a report folder

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

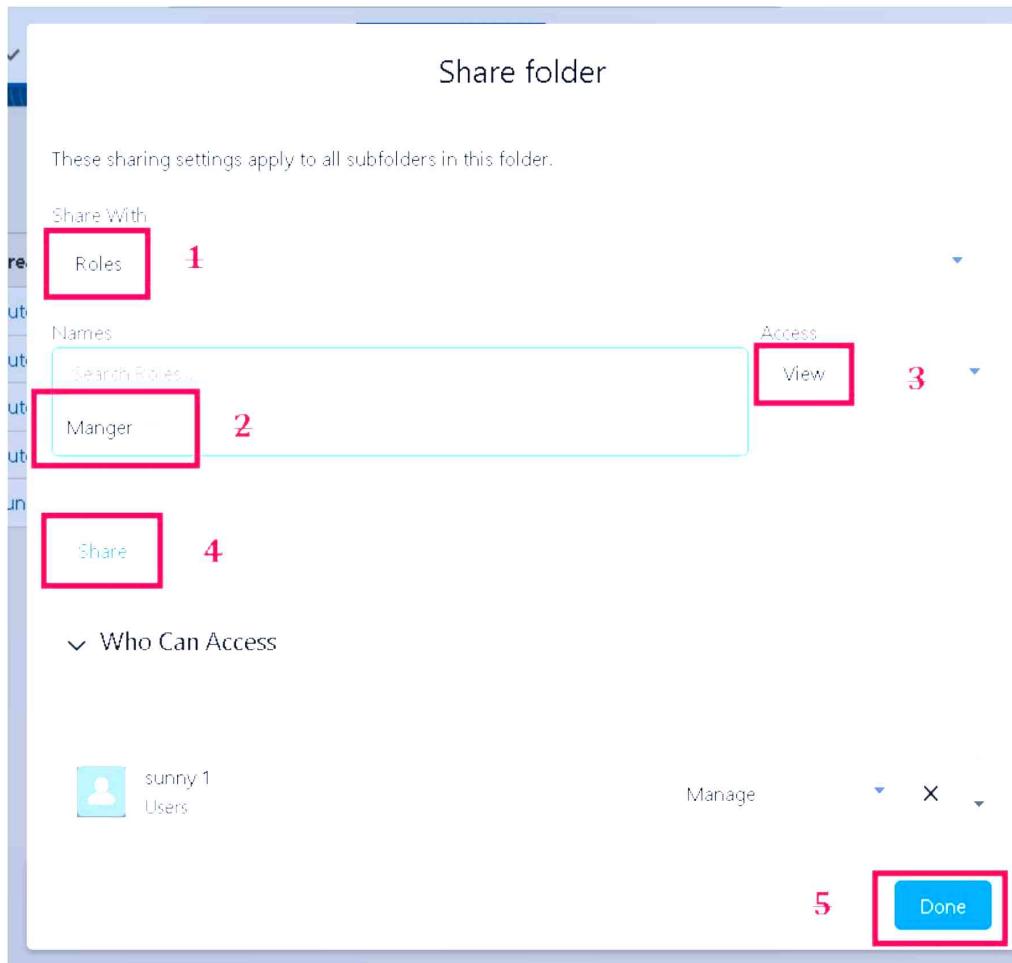


3. Give the Folder label as "Garage Management Folder", Folder unique name will be auto populated.
4. Click save.



Activity 2: 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.



Activity 3: Create Report Type

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

Action	Label	Description	Category	Deployed	Created By Alias	Created Date
View	Standard Reports	Standard reports are pre-defined reports that can be used as they are or modified to suit your needs.	Standard	✓	Salesforce	2023-01-01
View	Custom Reports	Custom reports are reports that you have created or modified to meet your specific needs.	Custom	✓	Salesforce	2023-01-01
View	Report Types	Report types are pre-defined reports that can be used as they are or modified to suit your needs.	Report Type	✓	Salesforce	2023-01-01
View	Report Categories	Report categories are pre-defined categories that can be used as they are or modified to suit your needs.	Report Category	✓	Salesforce	2023-01-01

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.

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," select "Contacts" as the primary object.

Primary Object: Customer Details

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

Identification

Deployment

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

Deployment Status: In Development

Deployed

Next Step

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

New Custom Report Type

Service information

Step 2 of 3

Step 2: Define Report Records Rel.

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

A Customer Details

Primary Object

B Select Object

Select object: appointment. Shows related B record (e.g. meeting, appointment, opportunity, contact, lead, account, etc.)

Diagram: Two overlapping circles labeled A and B. Below them are two sets of colored horizontal bars: blue and yellow.

Previous Save Cancel

Step 2. Define Report Records Set

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

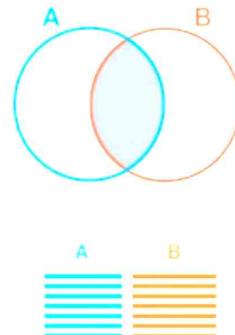
A Customer Details
Primary Object

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)



11. Again Click to relate another object.
12. And select the related object as “ service records”.
13. Repeat the process and select the related object as “ Billing details and feedback”.
14. And click on save.

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

Activity 4: Create Report

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

Try to fill every field in each record for better experience.

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

The screenshot shows the Employee Management application interface. The top navigation bar has several tabs: Home, Employee, Attendance, Project, Reports, and Reports. The 'Reports' tab is highlighted with a red box. Below the navigation bar is a search bar with a placeholder 'Search'. Underneath the search bar is a table with columns: Report Name, Description, Folder, Created By, Created On, and Subscribed. There are two rows of data in the table. At the bottom left of the table area, there is a 'FOLDERS' section with a 'New Folder' button. On the far right of the table, there is a 'More Options' button.

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

The screenshot shows the 'Create Report' dialog box. The left side has a sidebar with categories: 'Other Reports', 'Other Reports', and 'Other Reports'. The main area is titled 'Select a Report Type' and lists report types categorized by 'Category': 'Other Reports', 'Other Reports', and 'Other Reports'. The right side is titled 'Details' and shows a report named 'Service information'. It includes fields like 'Start Report', 'Description', 'Created By You', and 'Created By Others'. A green arrow points from the 'Start Report' button to the 'Service information' report, and another green arrow points from the 'Service information' report back to the 'Start Report' button.

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

The screenshot shows the Microsoft Power BI service interface. At the top, there's a navigation bar with 'REPORT' and 'New Service information Report'. Below it is a 'Service information' card with various metrics like 'Rating for service' (4.5), 'Payment Status' (Paid), and 'Total' (\$20,000). To the right of the card is a chart showing a single data point. Below the card is a 'Columns' section listing fields: Customer Name, Appointment Date, Service Status, and Payment Paid. A green arrow points from the 'Report Name' field in the 'Save Report' dialog to the 'Customer Name' field in the columns list.

Save Report

*Report Name: New Service information Report * ←

Report Unique Name: New_Service_information_Report_cV9j

Report Description:

Folder: Estate Management Folder ←

Select Folder

Cancel Save

Milestone 16: 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. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

Activity 1: 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.

Create folder

*Folder Label
Service Rating

*Folder Unique Name
ServiceRating

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

Activity 2: 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

Description

Folder

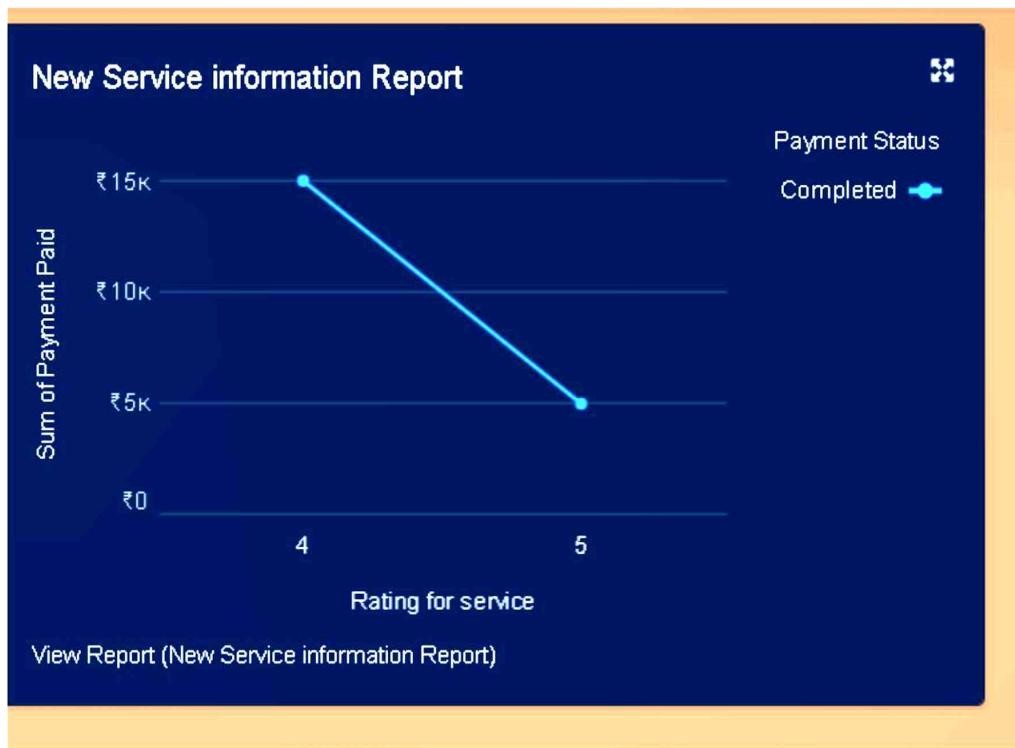
- ### 3. Select add component.



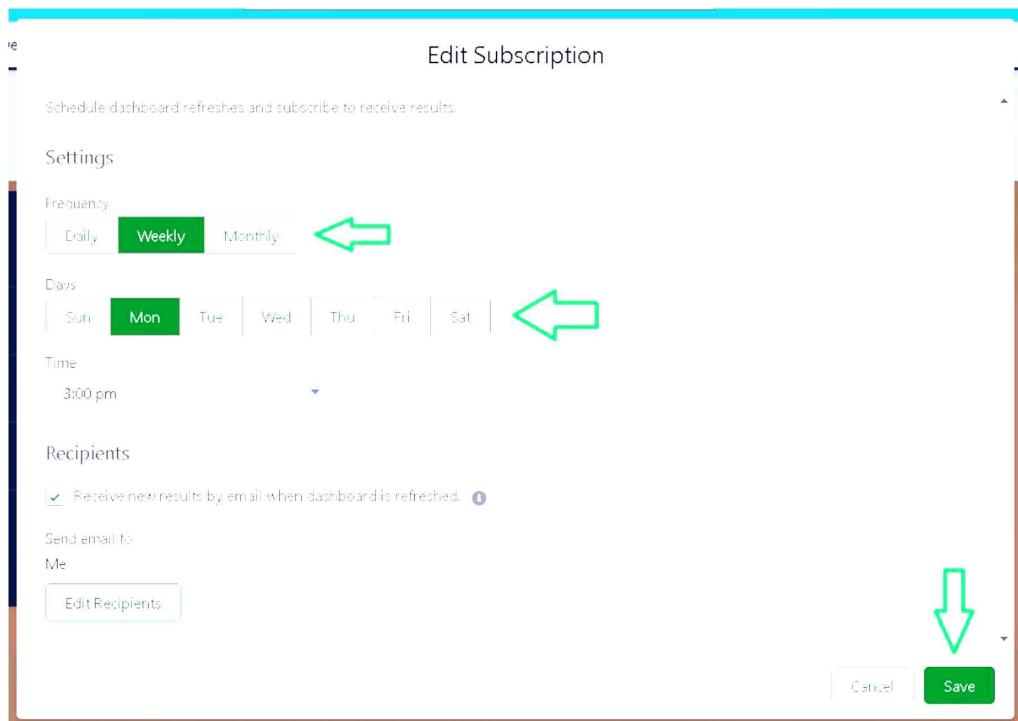
4. Select a Report and click on select.



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.



Milestone 17: User Adoption

Activity 1: 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.

New Customer Detail

* = Required Information

Information	
* Customer Name	Mac
Phone number	5678765567
Gmail	mac@gmail.com

Cancel Save & New **Save**

Now, Create the Appointment Record

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

Garage Management System

Appointments

Appointment app-016

Appointment Name	app-016	Customer Details	Mac	Owner	Annapurna SmartBridge
Customer Details	Mac	Customer Details	Mac	Owner	Annapurna SmartBridge
* Appointment Date	13/11/2024	Maintenance service	<input checked="" type="checkbox"/>	Repairs	<input checked="" type="checkbox"/>
Replacement Parts		Service Amount			
* Vehicle number plate	TS30EU0443				

Cancel **Save**

Now, Create a service Record

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

New Service record

Information

Service Record Name: ser-010

Owner: Annapurna SmartBridge

* Appointment: app-016

Quality Check Status:

Service Status: Started

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

Service Record Name: ser-010

Owner: Annapurna SmartBridge

* Appointment: app-016

Quality Check Status:

Service Status: Started

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

6. Now automatically Service status will be moved to completed.

Milestone 13: Flows

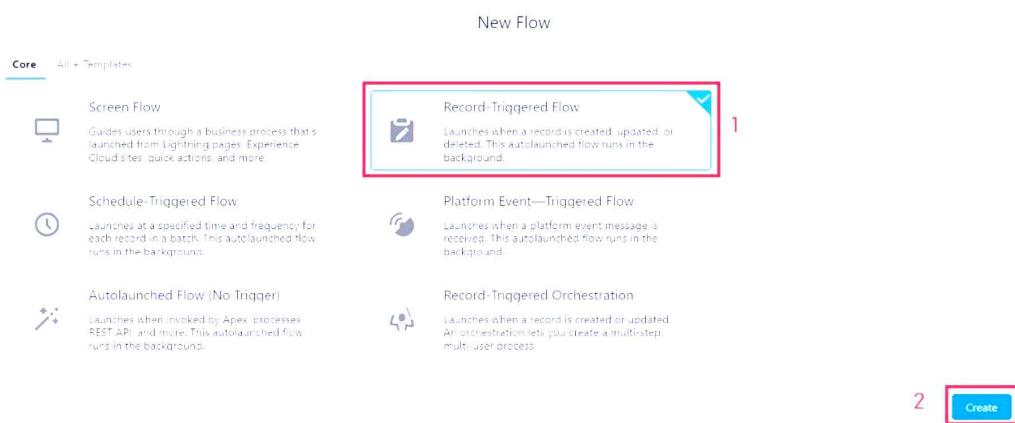
In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps. Flows are built using a visual interface and can be created without any coding knowledge.

Activity 1:Create a Flow

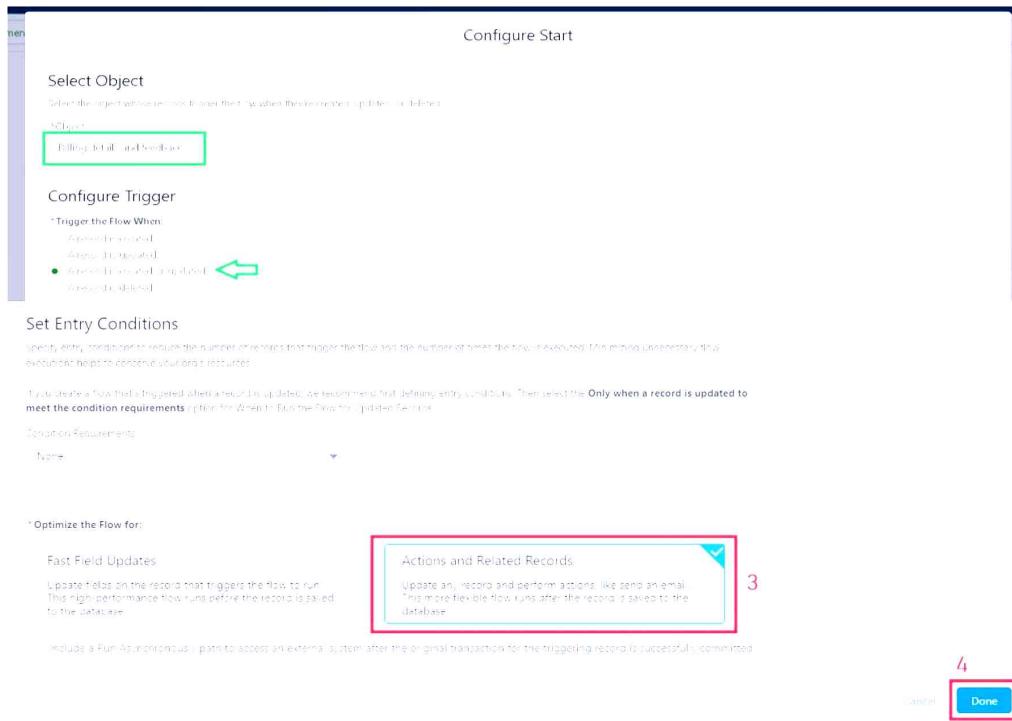
1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.



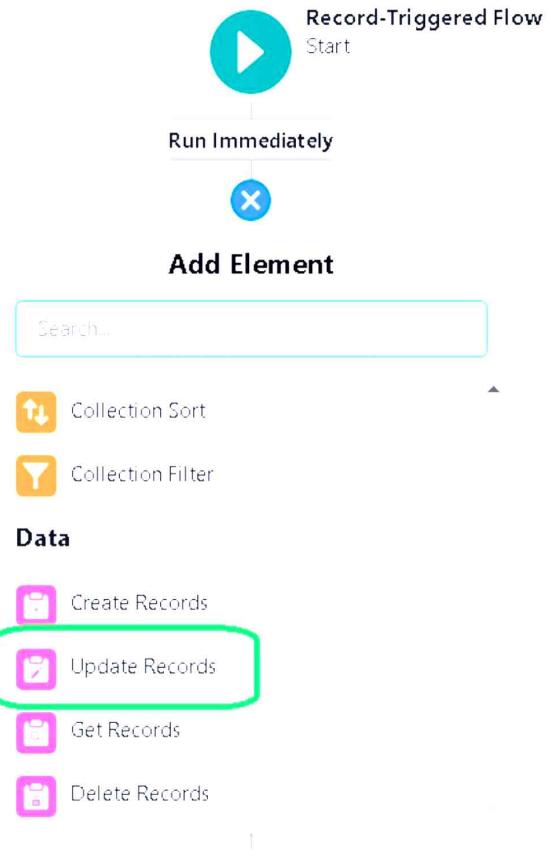
2. Select the Record-triggered flow and Click on Create.



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

Edit Update Records

Update Salesforce records using values from the flow.

*Label	*API Name
Amount Update	Amount_Update
Description	

***How to Find Records to Update and Set Their Values**

- Use the billing details and feedback record that triggered the flow
- Update records related to the billing details and feedback record that triggered the flow
- Use the IDs and all field values from a record or record collection
- Specify conditions to identify records, and set fields individually

Set Filter Conditions

Condition Requirements to Update Record

All Conditions Are Met (AND) ▾

Cancel Done

Set Filter Conditions

Condition Requirements to Update Record

All Conditions Are Met (AND) ▾

Field	Operator	Value
Payment_Status__c	Equals	Completed

+ Add Condition

Set Field Values for the Billing details and feedback Record

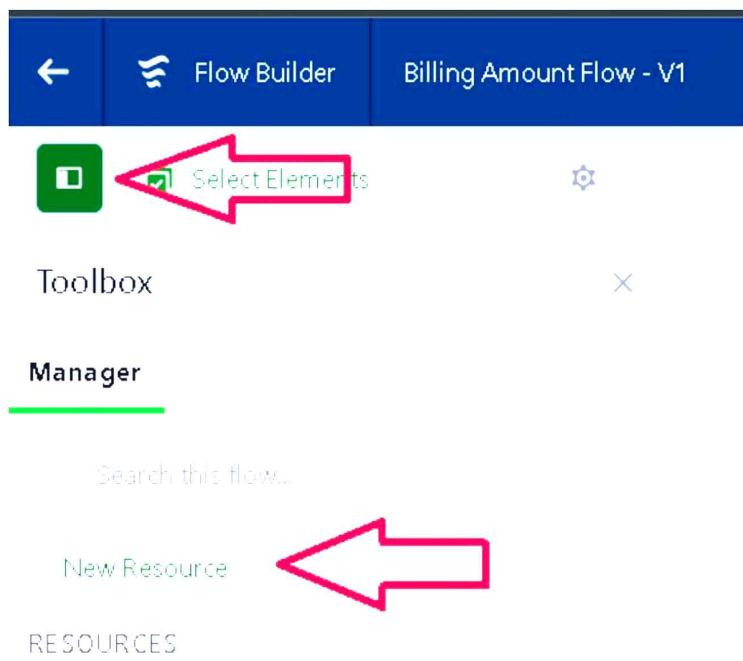
Field	Value
Payment_Paid__c	← [!\$Record.Service_records.Appointment.Service_Amount__c] X

+ Add Field

Cancel Done

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.Appointment.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.

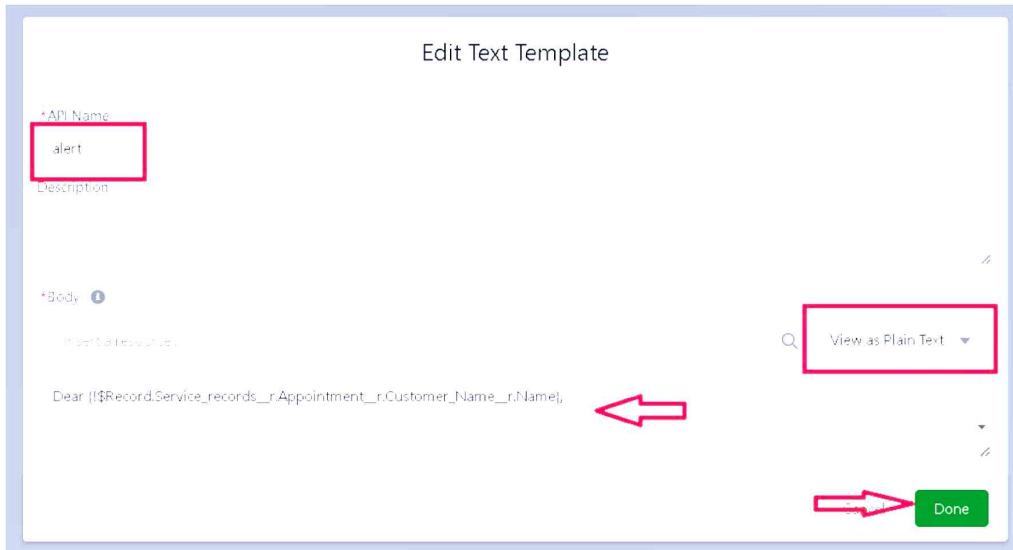
Dear {!\$Record.Service_records__r.Appointment__r.Customer_Name__r.Name},

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.

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.

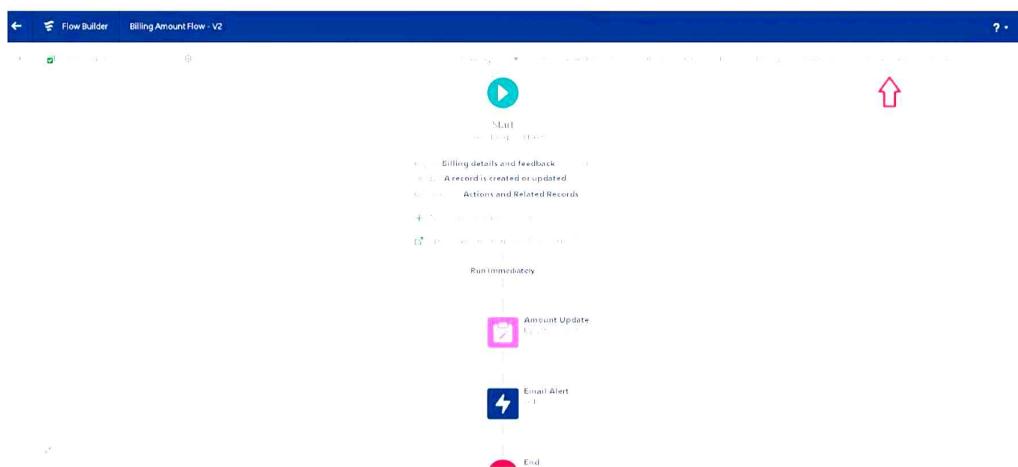
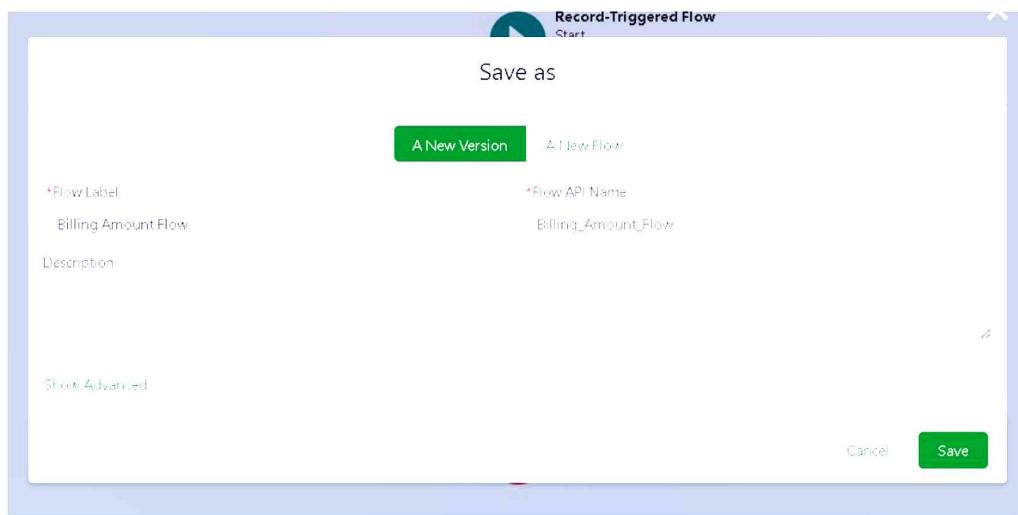
*Label	*API Name						
<input style="border: 2px solid red;" type="text" value="Email Alert"/>	Email_Alert						
Description							
<p>Set Input Values for the Selected Action</p> <table border="0"> <tr> <td>A₁ Body ({!alert})</td> <td><input checked="" type="checkbox"/> Include</td> </tr> <tr> <td>A₂ Email Template ID</td> <td><input type="checkbox"/> Don't include</td> </tr> <tr> <td>O₁ Long Email in Send</td> <td><input type="checkbox"/> Don't include</td> </tr> </table>		A ₁ Body ({!alert})	<input checked="" type="checkbox"/> Include	A ₂ Email Template ID	<input type="checkbox"/> Don't include	O ₁ Long Email in Send	<input type="checkbox"/> Don't include
A ₁ Body ({!alert})	<input checked="" type="checkbox"/> Include						
A ₂ Email Template ID	<input type="checkbox"/> Don't include						
O ₁ Long Email in Send	<input type="checkbox"/> Don't include						

Edit Action

A ₁ Recipient Address List ({!\$Record.Service_records__r.Appointment__r.Cus})	<input checked="" type="checkbox"/> Include
A ₂ Recipient ID	<input type="checkbox"/> Don't include
A ₃ Related Record ID	<input type="checkbox"/> Don't include
O ₁ Rich-Text-Formatted Body	<input type="checkbox"/> Don't include
A ₄ Sender Email Address	<input type="checkbox"/> Don't include
A ₅ Sender Type	<input type="checkbox"/> Don't include
A ₆ Subject Thank You for Your Payment - Garage Manageme	<input checked="" type="checkbox"/> Include

Cancel **Done**

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



Activity 2: Create another Flow

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

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

New Flow

Core All + Templates

Screen Flow
Guides users through a business process that is launched from Lightning pages, Experience Cloud sites, quick actions, and more.

Record-Triggered Flow
Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.

Schedule-Triggered Flow
Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.

Platform Event-Triggered Flow
Launches when a platform event message is received. This autolaunched flow runs in the background.

Autolaunched Flow (No Trigger)
Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.

Record-Triggered Orchestration
Launches when a record is created or updated. An orchestration lets you create a multi-step, multi-user process.

Create

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

Set Filter Conditions

Condition Requirements to Update Record

All Conditions Are Met (AND) ▾

Field	Operator	Value
Quality_Check_Status__c	Equals	True

+ Add Condition

Set Field Values for the Service record Record

Field	Value
Service_Status__c	Completed

+ Add Field

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

Conclusion :

The Garage Management System successfully demonstrates how technology can simplify and optimize the daily operations of an automobile service center. By digitizing processes such as customer management, vehicle tracking, job scheduling, billing, and inventory control, the system reduces manual effort, minimizes errors, and ensures smooth workflow.

The project highlights the importance of integrating multiple modules into a single platform to achieve efficiency, accuracy, and transparency. Garage owners gain valuable insights through reports and analytics, while customers benefit from timely communication, accurate billing, and better service experiences.

From a student perspective, the project provided hands-on exposure to software development, database management, problem-solving, and teamwork. It served as a practical application of theoretical knowledge, bridging the gap between classroom learning and real-world implementation.

In conclusion, the Garage Management System not only addresses the operational challenges of garages but also contributes to customer satisfaction and business growth, making it a valuable solution for the automobile service industry.

Project Achievements :

The development of the Garage Management System led to several key achievements:

1. Successful System Development
 - Designed and implemented a fully functional software solution to manage garage operations efficiently.
 - Integrated modules for customer records, vehicle details, job scheduling, billing, and inventory control.
2. Automation of Manual Processes
 - Reduced reliance on paper-based systems by digitalizing job cards, invoices, and service histories.

- Automated repetitive tasks such as stock tracking, billing, and service reminders.

3. Improved User Experience

- Created an intuitive interface for easy navigation by both administrators and garage staff.
- Enabled faster service processing, leading to improved customer satisfaction.

4. Data Management & Reporting

- Established a centralized database for secure and efficient storage of customer and garage information.
- Implemented reporting features to monitor revenue, job completion, and inventory usage.

5. Practical Learning for Students

- Strengthened technical skills in software design, programming, and database management.
- Developed teamwork, project management, and problem-solving abilities through collaborative effort.
- Gained real-world insight into how IT solutions can enhance business operations.

Student Learning Outcomes :

By working on the Garage Management System project, students achieved the following learning outcomes:

1. Knowledge Application

- Applied software engineering principles, database concepts, and programming techniques to solve a real-world problem.
- Understood how theoretical concepts from coursework translate into practical system development.

2. Technical Proficiency

- Gained hands-on experience in designing databases, developing user interfaces, and integrating system modules.
- Learned to implement features such as job scheduling, inventory tracking, billing, and reporting.

3. Problem-Solving & Critical Thinking

- Analyzed existing manual processes in garages and identified areas for improvement.
- Designed innovative solutions to optimize efficiency, reduce errors, and enhance customer service.

4. Collaboration & Project Management

- Practiced teamwork through task distribution, communication, and coordination during development.
- Applied project planning, documentation, and version control tools to manage progress effectively.

5. Communication & Professional Skills

- Enhanced skills in preparing structured project documentation and reports.
- Developed the ability to present technical information clearly to both technical and non-technical audiences.

6. Lifelong Learning & Adaptability

- Gained exposure to real-world challenges, encouraging adaptability and continuous learning.
- Understood the role of IT in transforming traditional businesses into efficient, technology-driven enterprises.

Future Scope :

The Garage Management System provides a strong foundation for automating garage operations, but it also has significant potential for future enhancements and scalability. Some possible future improvements include:

1. Mobile Application Integration

- Develop Android/iOS apps for customers and staff to enable real-time service updates, online booking, and job tracking.

2. Online Booking & Payment System

- Allow customers to schedule appointments through a web portal or mobile app.
- Integrate secure online payment gateways for advance or full payments.

3. IoT & Smart Vehicle Integration

- Connect with IoT-enabled vehicles to automatically detect and report service needs.

- Enable predictive maintenance by analyzing vehicle sensor data.

4. Customer Relationship Management (CRM)

- Implement loyalty programs, discounts, and personalized offers to retain customers.
- Introduce automated SMS/email reminders for service due dates and promotional offers.

5. Advanced Analytics & AI

- Use AI to forecast demand for spare parts and optimize inventory management.
- Provide data-driven insights to improve decision-making and business growth.

6. Cloud Deployment

- Migrate the system to the cloud for better scalability, accessibility, and data security.
- Enable multiple garage branches to access a centralized system.

7. Multi-language & Regional Support

- Offer support for different languages and regional formats to cater to a wider customer base.

8. Integration with Third-Party Services

- Connect with insurance companies for faster claim processing.
- Link with suppliers for automated spare part reordering.