

Garage Management System

Submitted By:

**Rajalingam.D (712921104042)
Udhayanithi.G 712921104057)
Shreeram.T (712921104050)
Mugil.M(712921104032)**

Project Overview

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.

1. Objectives

- **Efficient Management:** Automate and streamline workflows for vehicle repair, maintenance scheduling, and part inventory management.
- **Customer-Centric Approach:** Improve the customer experience through personalized communication, service history tracking, and timely updates.
- **Data-Driven Decisions:** Use Salesforce reports and dashboards for insights into service trends, revenue performance, and inventory levels.
- **Scalability:** Leverage Salesforce's cloud infrastructure to scale operations as the business grows.
- **Integration:** Seamlessly integrate with external systems like accounting software, payment gateways, and parts suppliers

2. Salesforce Key Features and Concepts Utilized

- **Appointment Scheduling:**

- Allow customers to book services via Salesforce Experience Cloud or other integrated portals.
- Schedule and assign tasks to mechanics and service staff.
- Send automated appointment confirmations and reminders.

- **Service Tracking:**

- Log ongoing repairs and maintenance activities.
- Monitor job progress and estimated completion times.
- Record parts and labor used for billing purposes.

- **Billing and Payments:**

- Generate invoices automatically after service completion.

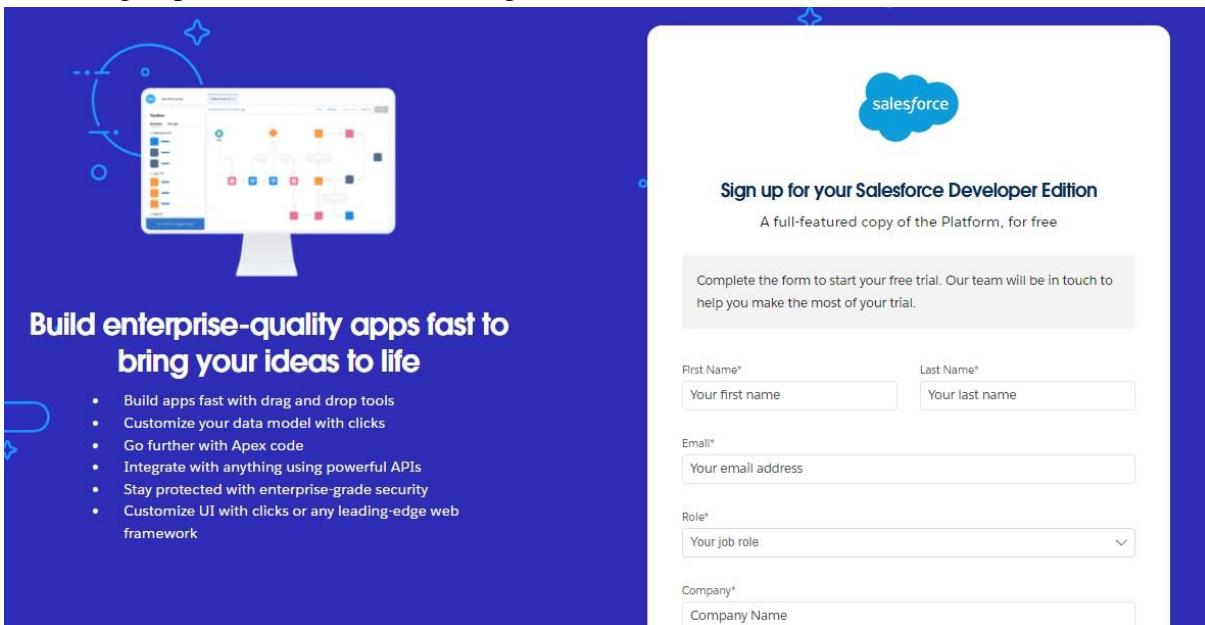
- Integrate with payment gateways for seamless transactions.
- Track outstanding payments and send reminders.
- **Reports and Dashboards:**
 - Visualize key metrics such as revenue, service turnaround time, and customer retention rates.
 - Generate customizable reports for inventory, staff performance, and financial summaries.

3. Detailed Steps to Solution Design

Step 1: Account Creation

Creating a developer org in salesforce.

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



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

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

Sign up for your Salesforce Developer Edition

A full-featured copy of the Platform, for free

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

First Name*	Last Name*
Your first name	Your last name
Email*	Your email address
Role*	Your job role
Company*	Company Name

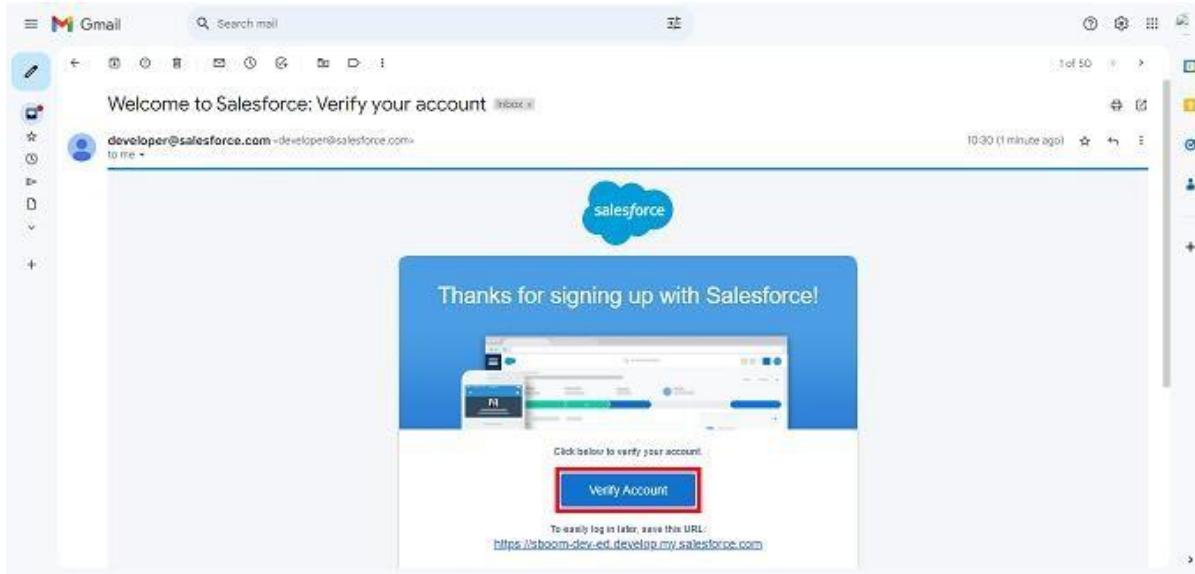
1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format : `username@organization.com`

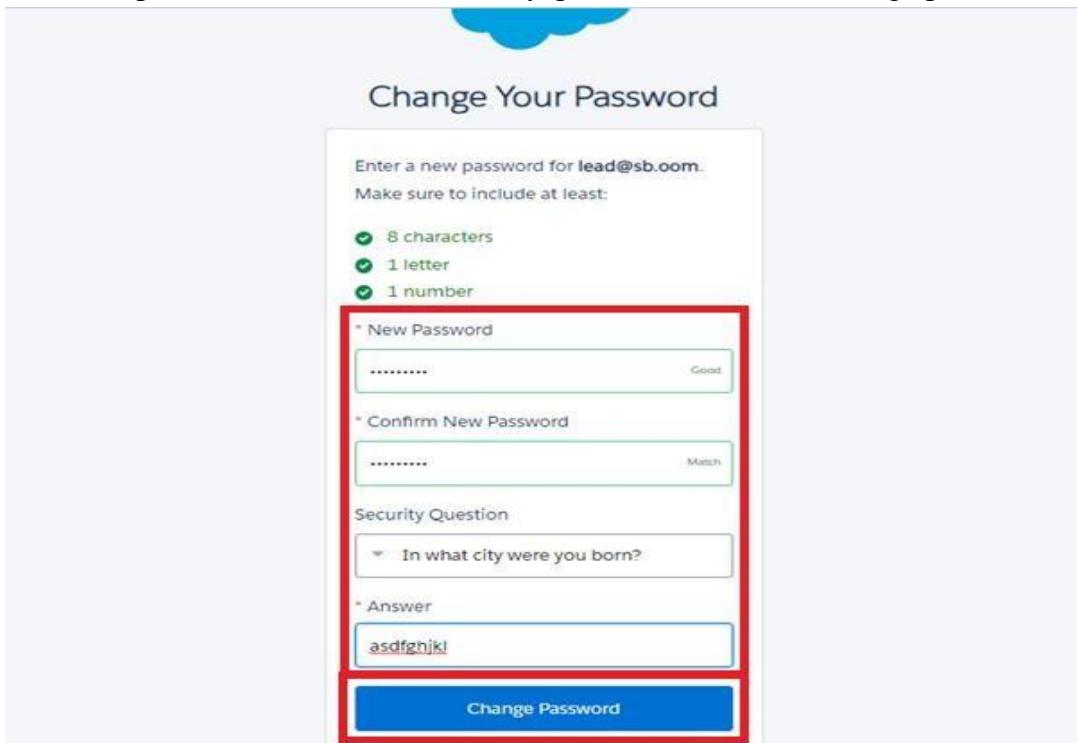
Click on sign me up after filling these.

Step 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.

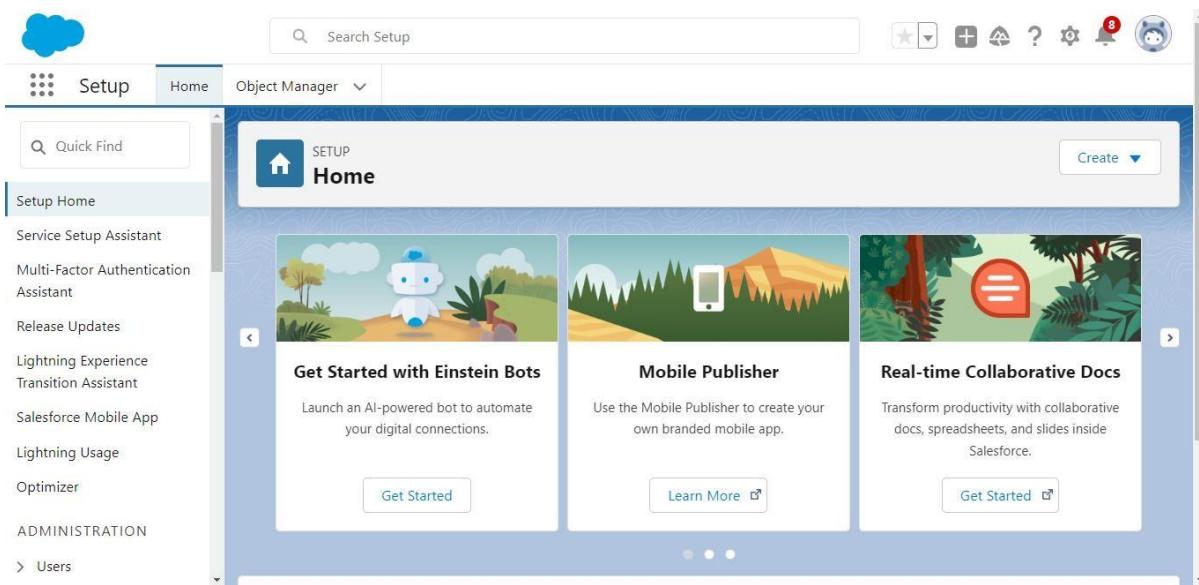


2. Click on Verify Account
3. Give a password and answer a security question and click on change password.



The screenshot shows the "Change Your Password" page. It prompts the user to enter a new password for lead@sb.oom, specifying requirements: 8 characters, 1 letter, and 1 number. A red box highlights the password input fields ("New Password" and "Confirm New Password"), the "Security Question" dropdown ("In what city were you born?"), and the "Answer" input field ("asdfghjkl"). The "Change Password" button at the bottom is also highlighted with a red border.

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

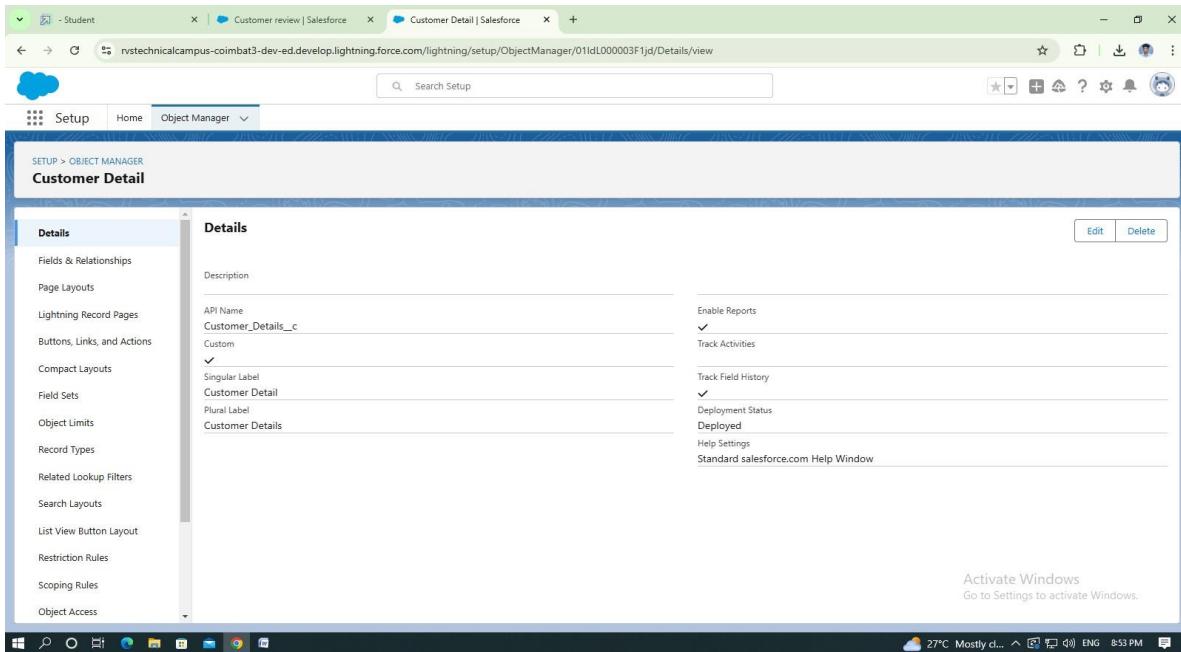


The screenshot shows the Salesforce Setup Home page. On the left, there is a sidebar with links like Quick Find, Setup Home, Service Setup Assistant, Multi-Factor Authentication Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, and Administration. The main area features three cards: "Get Started with Einstein Bots" (Launch an AI-powered bot to automate your digital connections), "Mobile Publisher" (Use the Mobile Publisher to create your own branded mobile app), and "Real-time Collaborative Docs" (Transform productivity with collaborative docs, spreadsheets, and slides inside Salesforce). Each card has a "Get Started" button.

Step 3: Create Customer Detail 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.

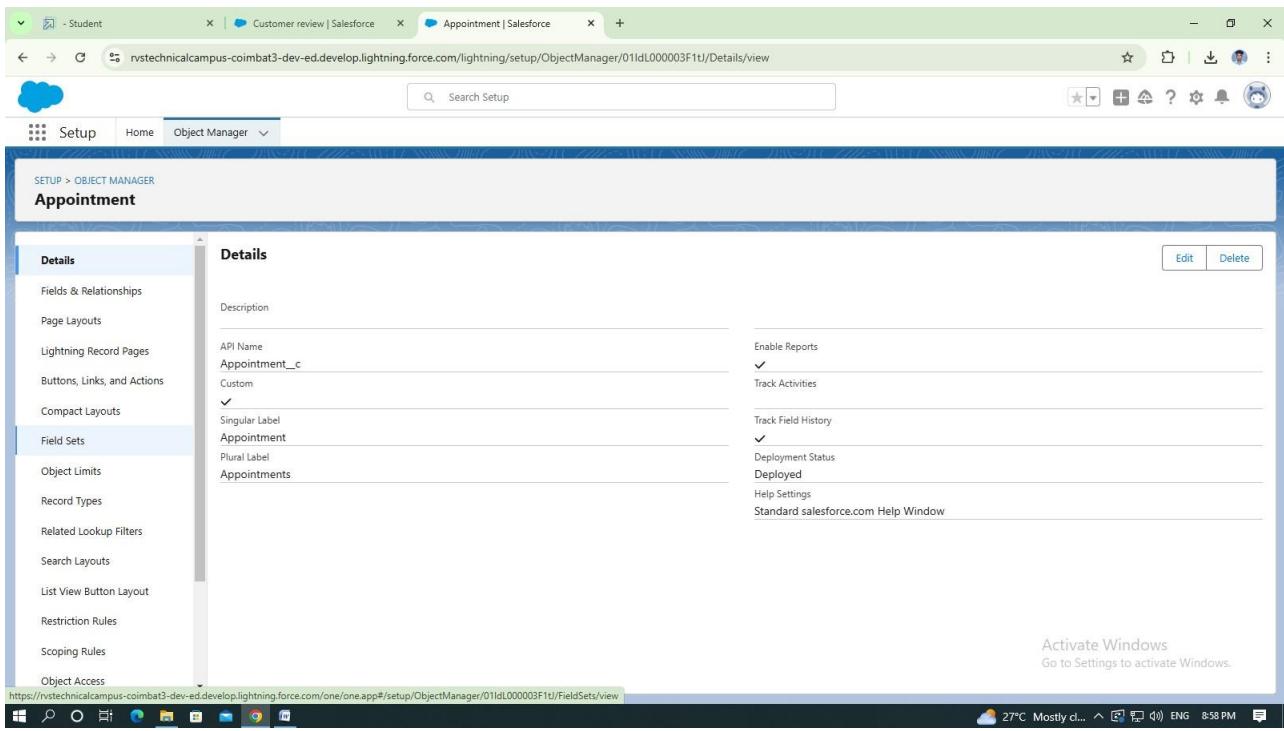


The screenshot shows the Salesforce Object Manager page for the "Customer Detail" object. The left sidebar lists various object configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, and Object Access. The main panel displays the "Customer Detail" object details. It includes fields for API Name (Customer_Details__c), Singular Label (Customer Detail), and Plural Label (Customer Details). On the right, there are checkboxes for enabling Reports, Activities, and Field History, along with deployment status (Deployed) and help settings. At the bottom, there is an "Activate Windows" link and a system status bar showing weather, battery, and network information.

Step 4: Create Appointment Objects

To create an object:

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

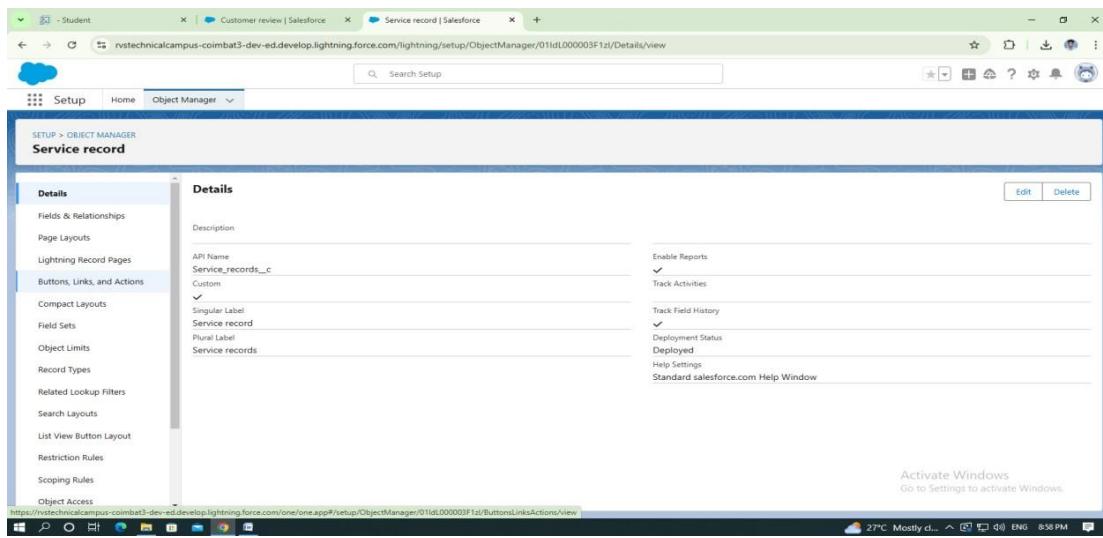


The screenshot shows the Salesforce Setup interface for creating a new object named 'Appointment'. The 'Field Sets' tab is currently selected in the left sidebar. In the main 'Details' pane, the API Name is set to 'Appointment__c', and the field set is marked as 'Custom'. Other settings shown include 'Enable Reports' and 'Track Field History' being checked. The status is listed as 'Deployed'.

Step 5: Create Service Record 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.

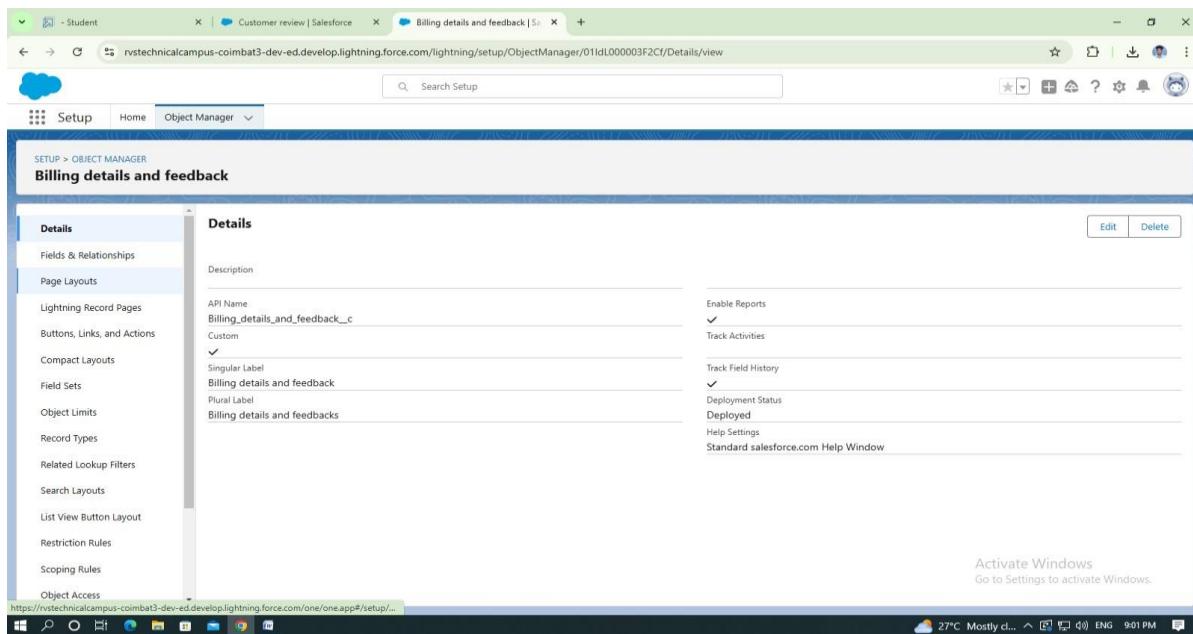


The screenshot shows the Salesforce Setup interface for creating a new object named 'Service record'. The left sidebar lists various configuration options like Fields & Relationships, Page Layouts, and Buttons, Links, and Actions. The main 'Details' tab is selected, showing the API name 'Service_records__c', a custom singular label 'Service record', and a plural label 'Service records'. On the right, under 'Enable Reports', 'Track Activities', and 'Track Field History', checkboxes are checked. Deployment status is set to 'Deployed'.

Step 6: 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.

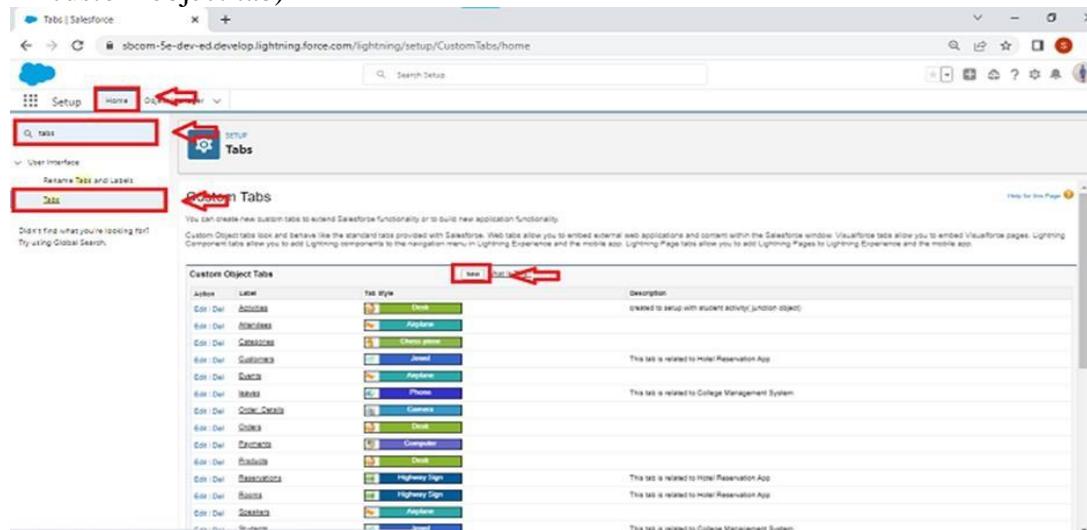


The screenshot shows the Salesforce Setup interface for creating a new object named 'Billing details and feedback'. The left sidebar lists various configuration options. The main 'Details' tab is selected, showing the API name 'Billing_details_and_feedback__c', a custom singular label 'Billing details and feedback', and a plural label 'Billing details and feedbacks'. On the right, under 'Enable Reports', 'Track Activities', and 'Track Field History', checkboxes are checked. Deployment status is set to 'Deployed'.

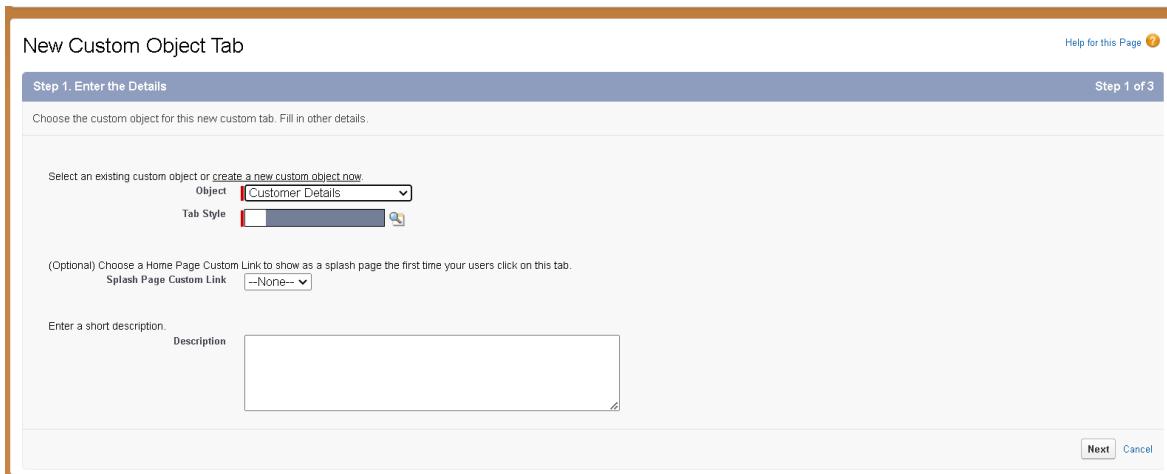
Step 7: Creating Customer Tab

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 of 3

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

Select an existing custom object or [create a new custom object now](#).

Object:

Tab Style:

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

Splash Page Custom Link:

Enter a short description.

Description:

Next **Cancel**

Tab Style Selector

[Create your own style](#)

[Hide styles which are used on other tabs](#)

	Airplane		Alarm clock		Apple		Balls
	Bank[1]		Bell		Big top		Boat[1]
	Books		Bottle		Box		Bridge
	Building		Building Block		Caduceus		Camera
	Can		Car		Castle		CD/DVD
	Cell phone		Chalkboard		Chess piece		Chip
	Circle		Compass		Computer		Credit card
	CRT TV		Cup		Desk[1]		Diamond
	Dice		Factory		Fan		Flag
	Form		Gears		Globe		Guitar
	Hammer		Hands		Handsaw		Headset
	Heart[1]		Helicopter		Hexagon		Highway Sign
	Hot Air Balloon		Insect		IP Phone		Jewel
	Keys		Laptop		Leaf		Lightning

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

Step 3. Add to Custom Apps

Step 3 of 3

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

Custom App	<input type="checkbox"/> Include Tab
Platform (standard_Platform)	<input type="checkbox"/>
Sales (standard_Sales)	<input type="checkbox"/>
Service (standard_Service)	<input type="checkbox"/>
Marketing (standard_Marketing)	<input type="checkbox"/>
Sample Console (standard_ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>
	

Analytics Studio (standard_Insights)	<input type="checkbox"/>
Sales Console (standard_LightningSalesConsole)	<input type="checkbox"/>
Service Console (standard_LightningService)	<input type="checkbox"/>
Sales (standard_LightningSales)	<input type="checkbox"/>
Lightning Usage App (standard_LightningInstrumentation)	<input type="checkbox"/>
Digital Experiences (standard_SalesforceCMS)	<input type="checkbox"/>
Queue Management (standard_QueueManagement)	<input type="checkbox"/>
Bolt Solutions (standard_LightningBolt)	<input type="checkbox"/>
Data Manager (standard_DataManager)	<input type="checkbox"/>
Salesforce Scheduler Setup (standard_LightningScheduler)	<input type="checkbox"/>
<input checked="" type="checkbox"/> Append tab to users' existing personal customizations	

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

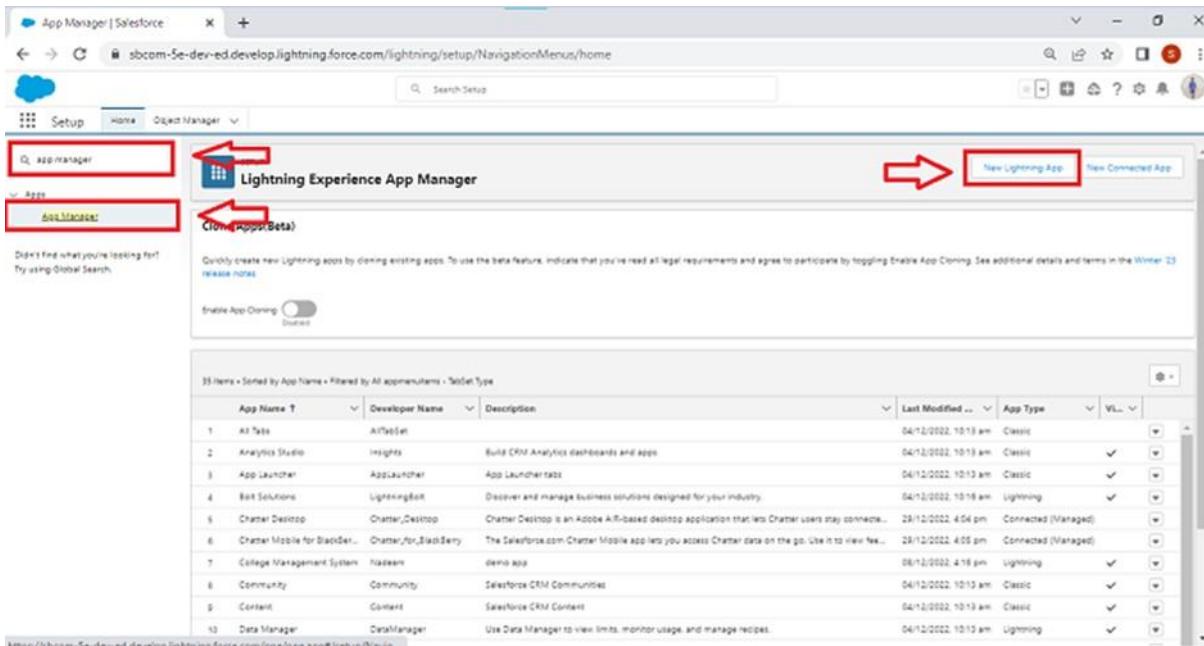
Step 8: Creating Remaining Tabs

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 .

Step 9: Create a Lightning App

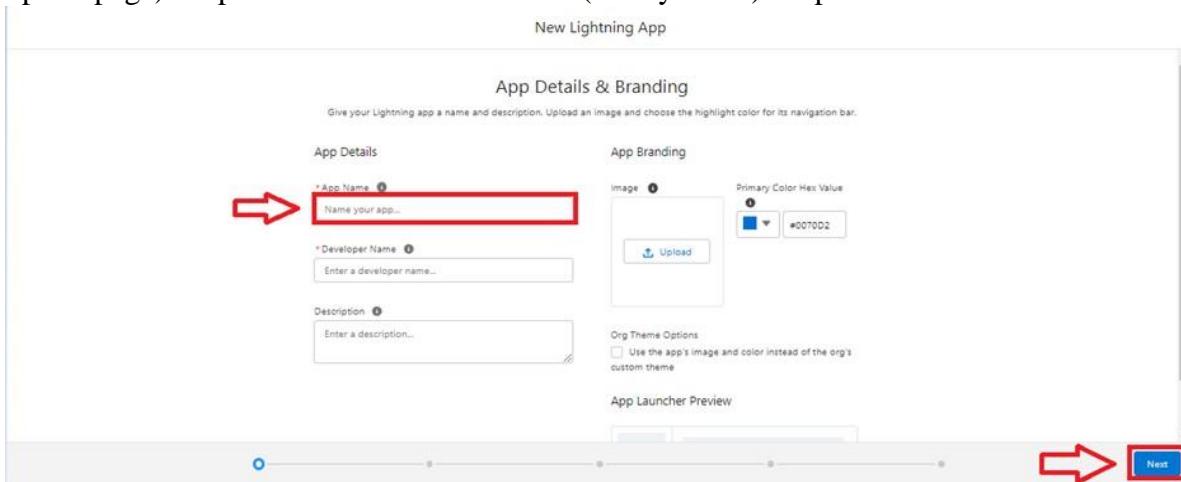
To create a lightning app page:

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



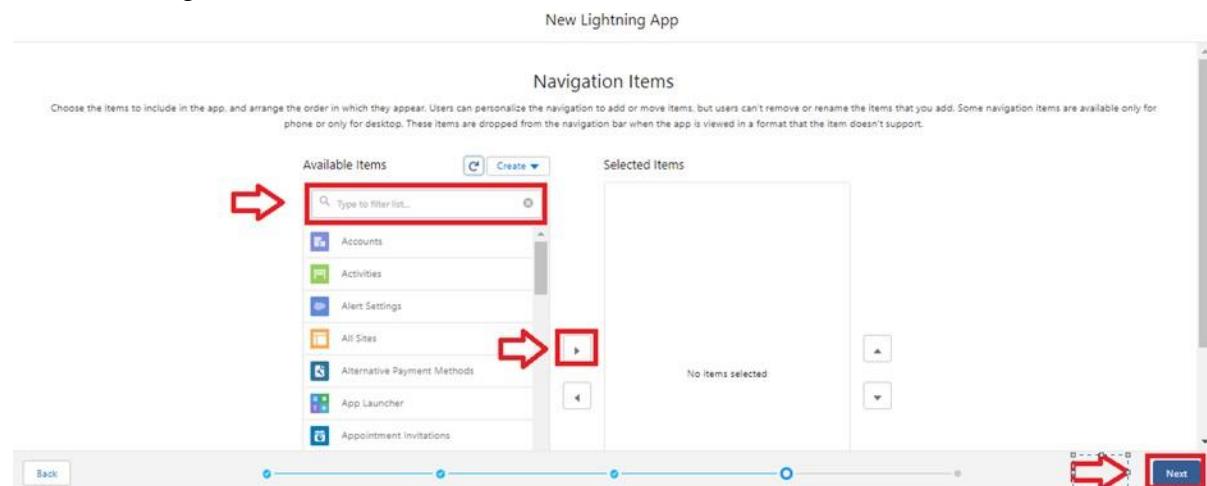
The screenshot shows the Salesforce App Manager interface. At the top, there is a search bar and a navigation menu with tabs for Setup, Home, and Object Manager. Below the navigation, there is a section titled "Lightning Experience App Manager" with a note about cloning apps. On the right side of this section, there is a red box highlighting the "New Lightning App" button. The main area displays a list of existing apps, with several fields like "App Name", "Developer Name", and "Last Modified" visible. A red box highlights the "Clone (Beta)" link under the "Actions" column for one of the listed apps.

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.



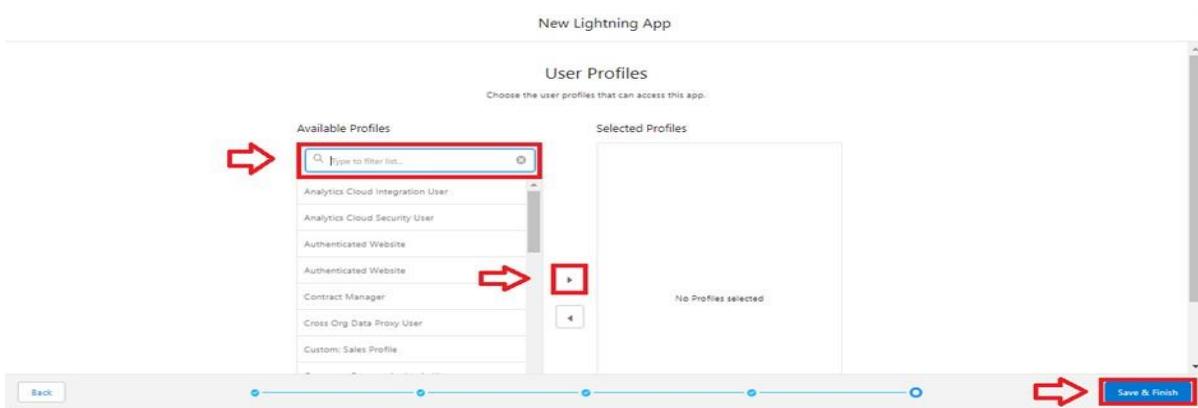
The screenshot shows the "New Lightning App" configuration page. The title is "New Lightning App". The main section is titled "App Details & Branding" with the sub-instruction "Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar." It contains three main sections: "App Details" (with fields for "App Name" (highlighted with a red box), "Developer Name", and "Description"), "App Branding" (with fields for "Image" (highlighted with a red box) and "Primary Color Hex Value" (#0070D2)), and "Org Theme Options" (with a checkbox for "Use the app's image and color instead of the org's custom theme"). At the bottom, there is a "App Launcher Preview" section and a "Next" button highlighted with a red box.

3. To Add Navigation Items:



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

5. To Add User Profiles:

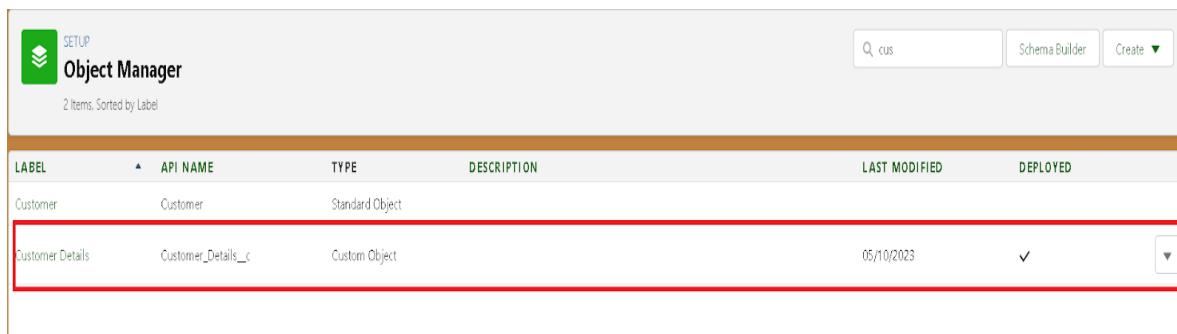


Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.

Step 10: Creation of Fields for The Customer DetailsObject

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.

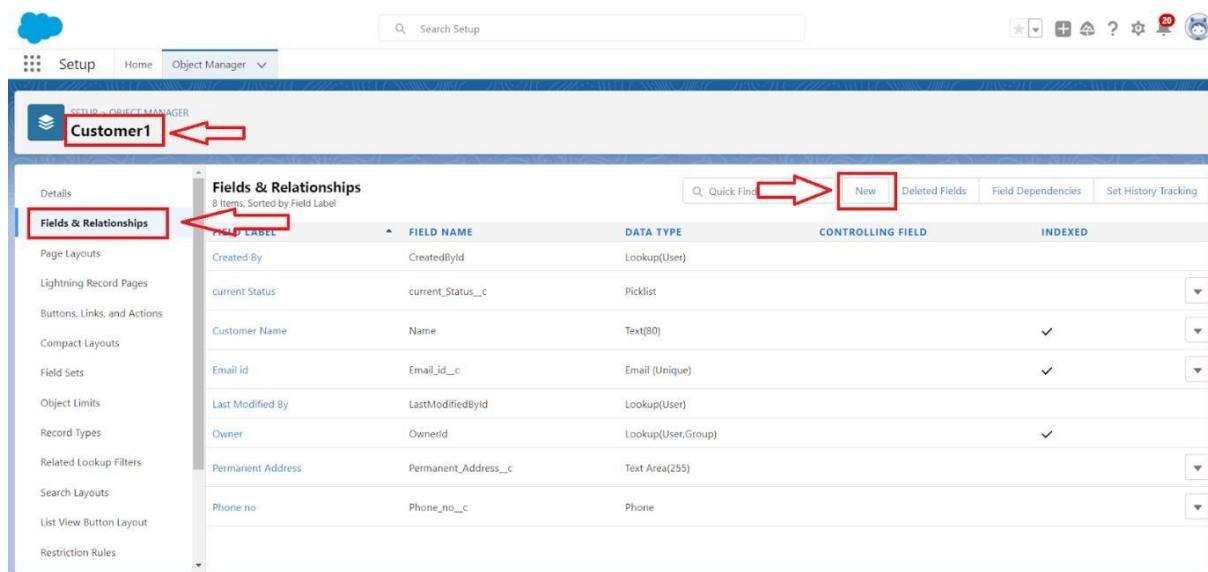


Object Manager

2 Items. Sorted by Label

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

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



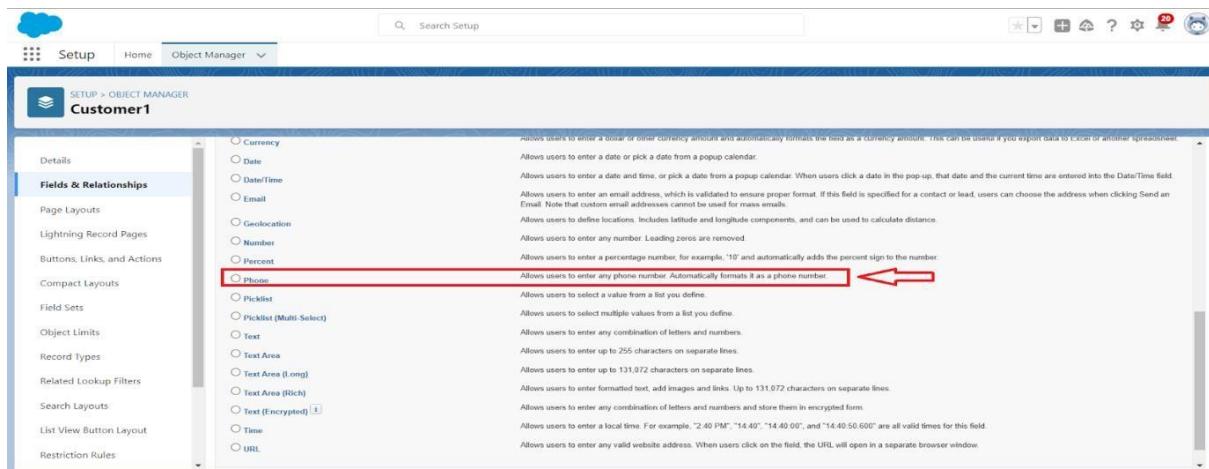
Customer1

Fields & Relationships

New

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

0. Select Data Type as a “Phone”



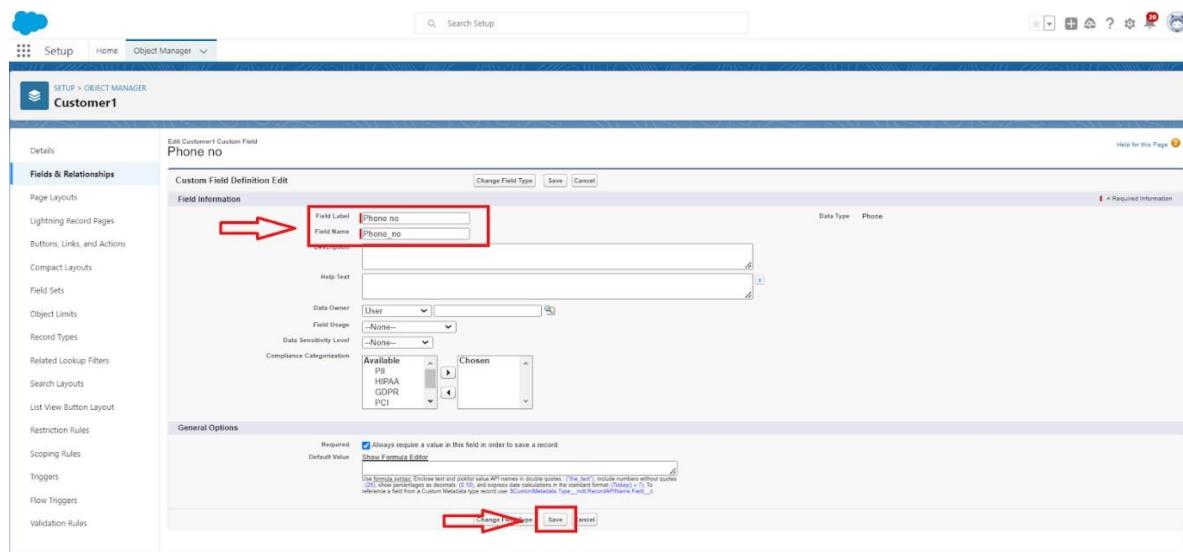
Customer1

Fields & Relationships

Phone

Allows users to enter any phone number. Automatically formats it as a phone number.

0. Click on next.



The screenshot shows the 'Edit Customer Custom Field' page. The 'Field Label' is set to 'Phone no' and the 'Field Name' is auto-generated as 'Phone_no'. A red arrow points to the 'Field Label' input field. Another red arrow points to the 'Save' button at the bottom right.

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.

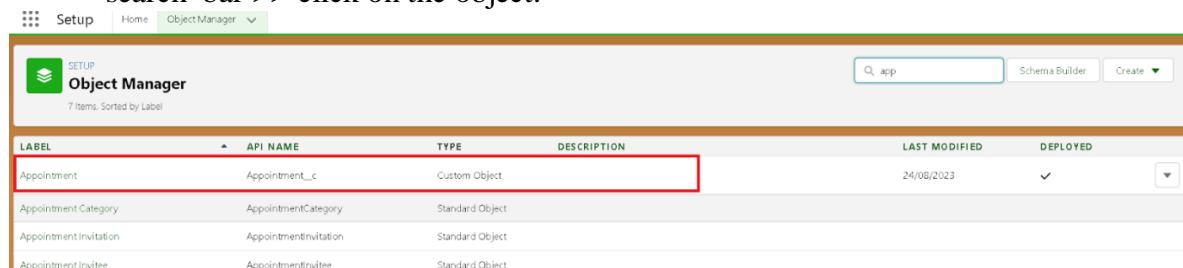
2. To create another fields in an object:

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.

Step 11: Creation of Lookup Field

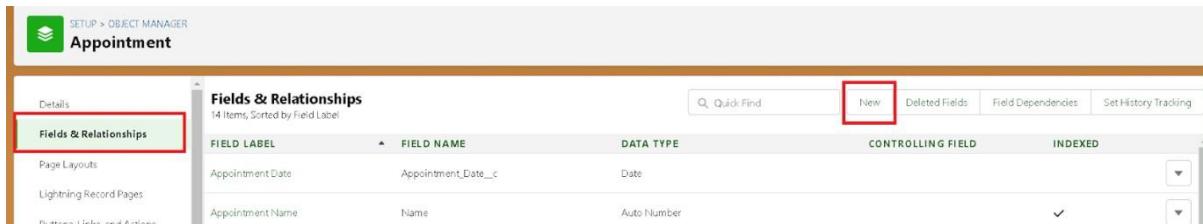
Creation of Lookup Field on Appointment Object :

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

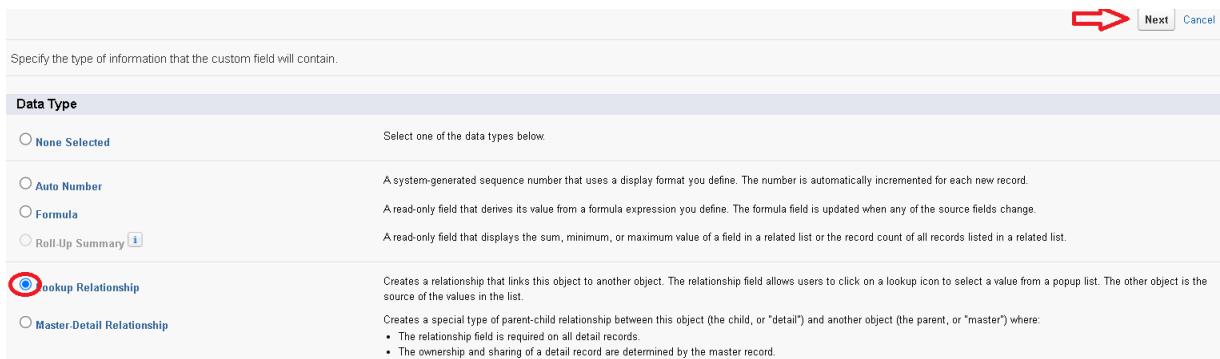


LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Appointment	Appointment_c	Custom Object		24/08/2023	✓
Appointment Category	AppointmentCategory	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			

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



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



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.

Lookup Filter

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

[▼ Hide Filter Settings](#)

[Filter Criteria](#) [Insert Suggested Criteria](#) [Clear Filter Criteria](#)

Field	Operator	Value / Field
Appointment: Appointment Date	less than	Field <input style="width: 20px; height: 20px;" type="button" value="..."/> Appointment: Created Date <input style="width: 20px; height: 20px;" type="button" value="..."/> <input style="width: 20px; height: 20px;" type="button" value="Clear"/>
A/B	Begin typing to search for a field... <input style="width: 20px; height: 20px;" type="button" value="..."/> <input style="width: 20px; height: 20px;" type="button" value="None"/> <input style="width: 20px; height: 20px;" type="button" value="Value"/>	<input style="width: 20px; height: 20px;" type="button" value="Clear"/>

[Add Filter Criterion](#)

Filter Type **Required.** The user-entered value must match filter criteria.
 If it doesn't, display this error message on save:
 Value does not exist or does not match filter criteria.

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

Lookup Window Text Add this informational message to the lookup window.

Active Enable this filter.

[Change Field Type](#) [Save](#) [Cancel](#)

Creation of 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.

Step 12: Creation of Checkbox field

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.

SETUP > OBJECT MANAGER
Appointment

[Details](#) [Fields & Relationships](#) [Page Layouts](#) [Lightning Record Pages](#) [Buttons, Links, and Actions](#) [Compact Layouts](#) [Field Sets](#) [Object Limits](#) [Record Types](#) [Related Lookup Filters](#) [Search Layouts](#) [List View Button Layout](#) [Restriction Rules](#)

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

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

Data Type

<input type="radio"/> None Selected	Select one of the data types below.
<input type="radio"/> Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
<input type="radio"/> Formula	A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
<input type="radio"/> Roll-Up Summary 	A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
<input type="radio"/> Lookup Relationship	Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The other object is the source of the values in the list.
<input type="radio"/> Master-Detail Relationship	Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where: <ul style="list-style-type: none"> The relationship field is required on all detail records. The ownership and sharing of a detail record are determined by the master record. When a user deletes the master record, all detail records are deleted. You can create roll-up summary fields on the master record to summarize the detail records.
<input type="radio"/> External Lookup Relationship	The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The master object is the source of the values in the list.
<input checked="" type="radio"/> Checkbox	Allows users to select a True (checked) or False (unchecked) value.
<input type="radio"/> Currency	Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another application.

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

Step 2. Enter the details

Step 2 of 4

Field Label 

Default Value Checked 

Field Name 

Description

Help Text

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

Previous Next Cancel 

0. 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 Nme : is auto populated
6. Default value : unchecked
7. Click on next >> next >> save

Step 13: Creation of Date Field

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

Help for this Page 

Step 2. Enter the details Step 2 of 4

Field Label 

Field Name 

Description

Help Text

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

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

Default Value Show Formula Editor

Previous Next Cancel 

Step 14: Creation of Currency Field

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 Nme : is auto populated

Step 2. Enter the details Step 2 of 4

Field Label 

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

Length Number of digits to the left of the decimal point

Decimal Places Number of digits to the right of the decimal point

Field Name 

Description

Help Text

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

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

0. Click on next
1. Give read only for all the profiles in field level security for profile.
2. Click on next >> save.

Appointment
New Custom Field

Help for this Page 

Step 3. Establish field-level security

Step 3 of 4

Previous Next Cancel

Field Label	Service Amounts
Data Type	Currency
Field Name	Service_Amounts
Description	

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

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

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 Nme : is auto populated

Step 15: Creation of Text Field

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.

Step 2. Enter the details

Step 2 of 4

Previous Next Cancel

Field Label	<input type="text" value="Vehicle number plate"/> 
Please enter the maximum length for a text field below.	
Length	<input type="text" value="10"/>
Field Name	<input type="text" value="Vehicle_number_plate"/> 
Description	<input type="text"/>
Help Text	<input type="text"/>

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

Unique Do not allow duplicate values

Treat “ABC” and “abc” as duplicate values (case insensitive)
 Treat “ABC” and “abc” as different values (case sensitive)

External ID Set this field as the unique record identifier from an external system

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

0. Click on next >> next >> save.

Creation of Text Fields in Billing details and feedback object :

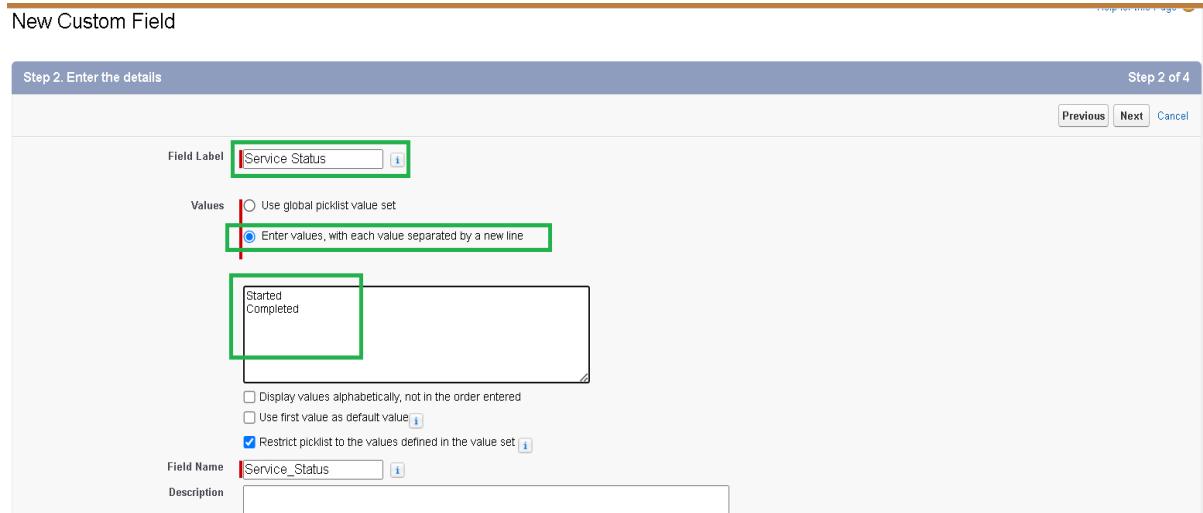
1. Go to setup >> click on Object Manager >> type object name(Billing details and feedback) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select “text” as data type and click Next.
4. Give the Field Label : Rating for service
5. Field Name : is auto populated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

Step 16: Creation of Picklist

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.
4. 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.
5. The values are: Started, Completed.

New Custom Field



Step 2. Enter the details Step 2 of 4

Field Label: Service Status

Values: 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:

6. Click Next.
7. Next >> Next >> Save.

Creation of Picklist 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. Click on fields &relationship >> click on New.
3. Select Data type as “Picklist” and click Next.

4. 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.
5. The values are: Pending, Completed.
6. Click Next.
7. Next >> Next>> Save.

Step 17: Creation of Formula Field 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 “Formula” and click Next.
4. 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 Field Name Upload

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

Formula Return Type

None Selected Select one of the data types below.

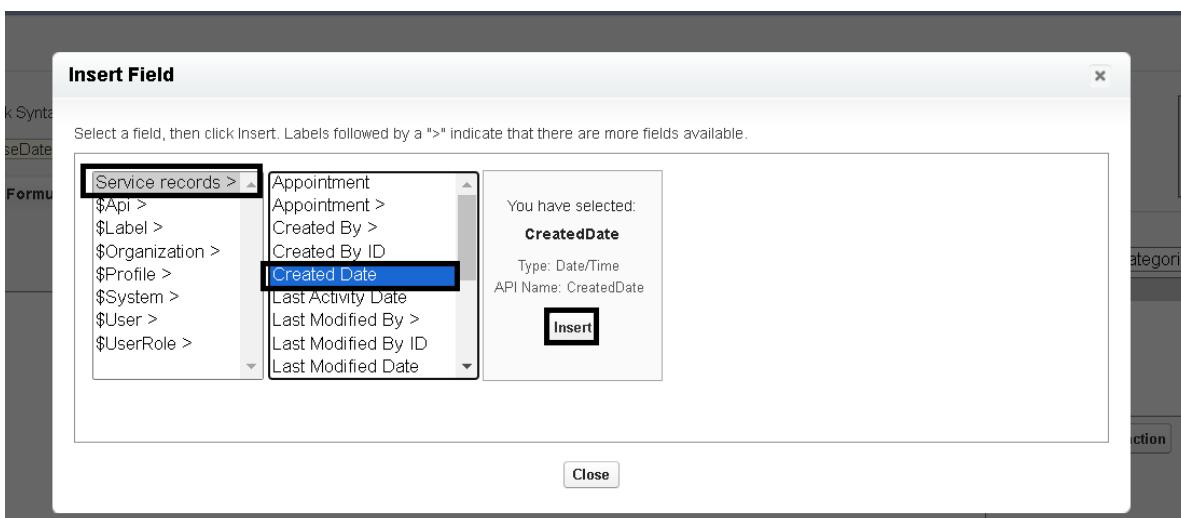
Checkbox Calculate a boolean value.
Example: `TODAY() > CloseDate`

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

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

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

5. Insert field formula should be :CreatedDate



Step 3. Enter formula Step 3 of 5

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: [Reminder Date = CloseDate - 7](#) [More Examples...](#)

Simple Formula Advanced Formula

Insert Field Insert Operator

service dates (Date) = [CreatedDate](#) ←

Functions

— All Function Categories —
 ABS
 ACOS
 ADDMONTHS
 AND
 ASCII

Quick Tips

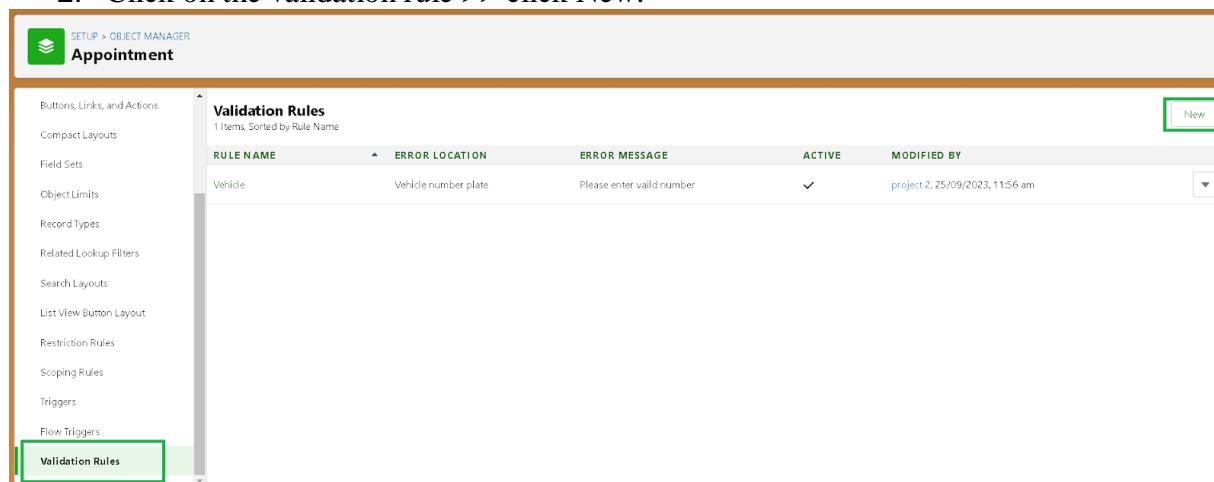
- Getting Started
- Operators & Functions

6. click “Check Syntax” .
7. Click next >> next >> Save.

Step 18: Validation Rule

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.



SETUP > OBJECT MANAGER

Appointment

Buttons, Links, and Actions

Validation Rules

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Vehicle	Vehicle number plate	Please enter valid number	✓	project 2, 25/09/2023, 11:56 am

New

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

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

Validation Rule Edit

Save Save & New Cancel

Rule Name Vehicle

Active

Description vehicle

Error Condition Formula

Example: [Discount_Percent_c>0.30](#) [More Examples...](#)

Display an error if Discount is more than 30%

If this formula expression is true, display the text defined in the Error Message area

Insert Field Insert Operator

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

Functions

— All Function Categories —
 ABS
 ACOS
 ADDMONTHS
 AND
 ASCII
 ASIN

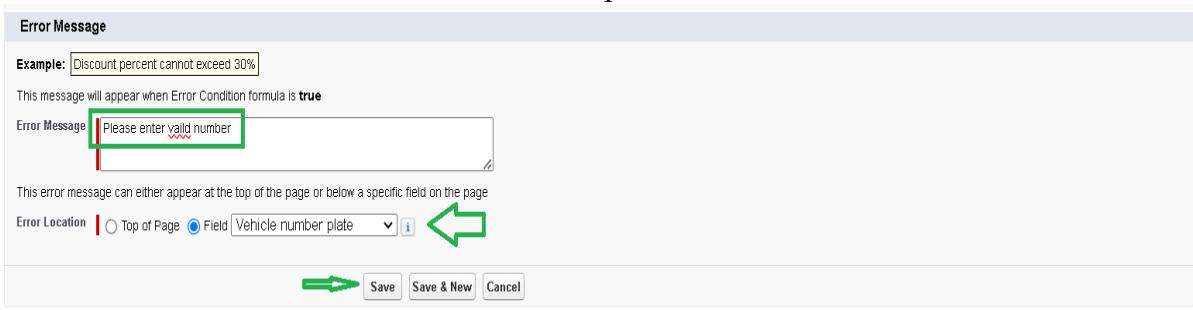
Insert Selected Function

ABS(number)
 Returns the absolute value of a number, a number without its sign

Help on this function

Check Syntax

5. Enter the Error Message as “Please enter validnumber ”, select the Error location as Field and select the field as “Vehicle number plate”, and click Save.



Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is true

Error Message: Please enter valid number

This error message can either appear at the top of the page or below a specific field on the page

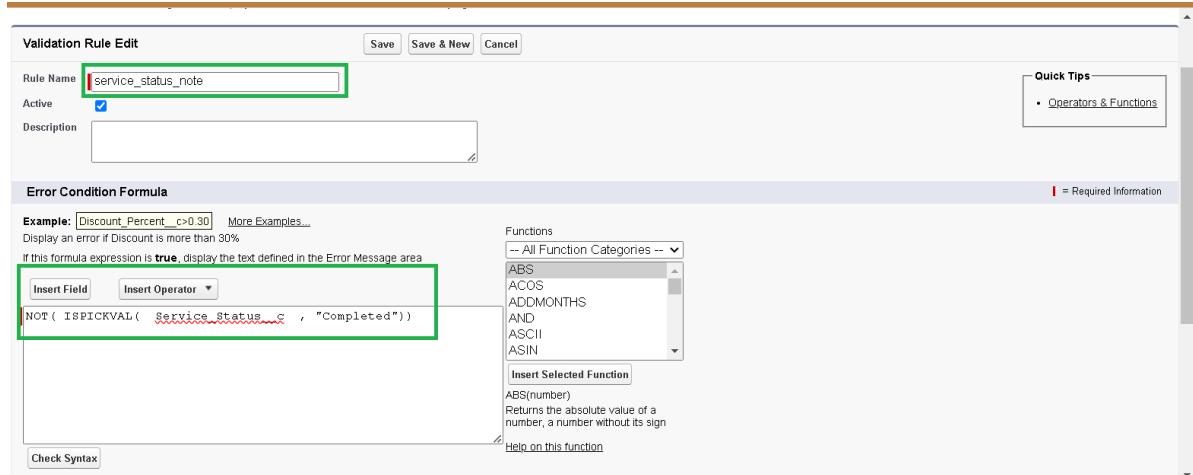
Error Location: Top of Page Field Vehicle number plate

Save Save & New Cancel

To create a validation rule to an Service records Object

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

NOT(ISPICKVAL(Service_Status_c , "Completed"))



Validation Rule Edit

Save Save & New Cancel

Rule Name: Service_status_note

Active:

Description:

Error Condition Formula

Example: Discount_Percent_c>30 More Examples..

If this formula expression is true, display the text defined in the Error Message area

NOT(ISPICKVAL(Service_Status_c , "Completed"))

Functions

-- All Function Categories --

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

Insert Selected Function

ABS(number)
Returns the absolute value of a number, a number without its sign

Help on this function

Check Syntax

5. Enter the Error Message as “still it is pending”, select the Error location as Field and select the field as “Service status”, and click Save.



Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is true

Error Message: still it is pending

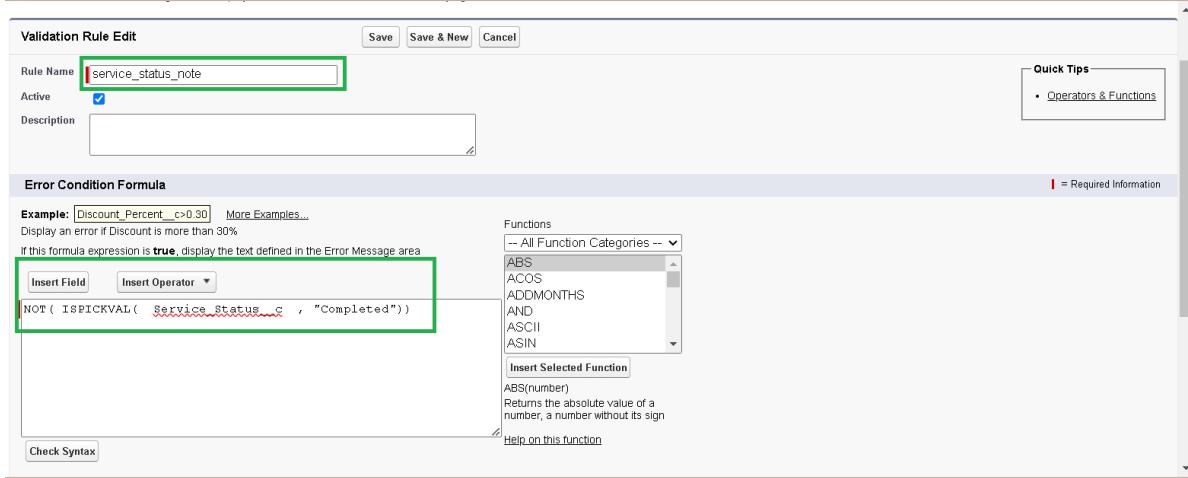
This error message can either appear at the top of the page or below a specific field on the page

Error Location: Top of Page Field Service Status

Save Save & New Cancel

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}"))`



Validation Rule Edit

Save Save & New Cancel

Rule Name: service_status_note

Active:

Description:

Error Condition Formula

Example: Discount_Percent_c>0.30 More Examples...

If this formula expression is true, display the text defined in the Error Message area.

Insert Field Insert Operator NOT(ISPICKVAL(Service_Status_c , "Completed"))

Functions

- All Function Categories --
- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

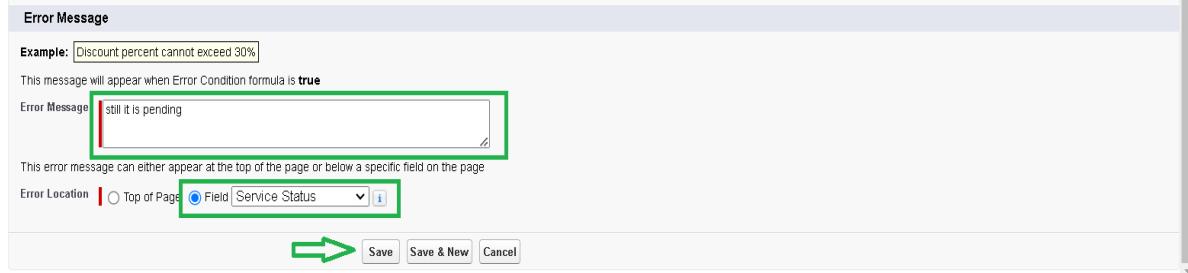
Insert Selected Function

ABS(number)
Returns the absolute value of a number, a number without its sign

Help on this function

Check Syntax

0. 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.



Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is true

Error Message: still it is pending

This error message can either appear at the top of the page or below a specific field on the page

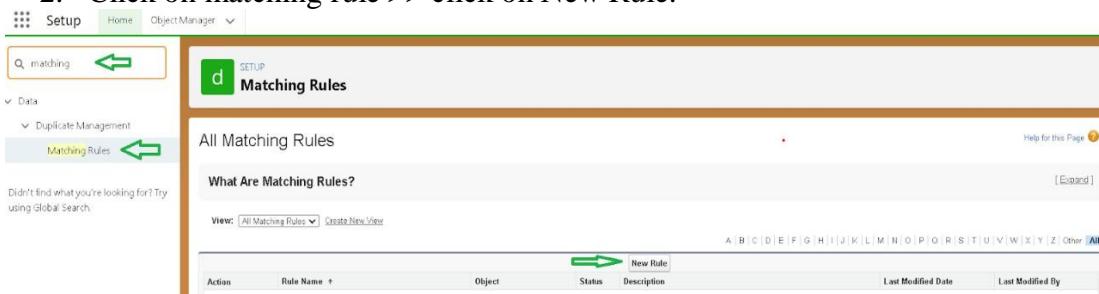
Error Location: Top of Page Field: Service Status

Save Save & New Cancel

Step 19: Duplication Rule

To create a matching rule to an Customer details Object

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



Setup Home Object Manager

Q: matching

d SETUP Matching Rules

All Matching Rules

What Are Matching Rules?

View: All Matching Rules Create New View

Action	Rule Name	Object	Status	Description	Last Modified Date	Last Modified By

- Select the object as Customer details and click Next.

Matching Rule
New Matching Rule

Help for this Page ?

Step 1: Select object Step 1 of 2

Select the object to which this matching rule applies.

Object: Customer Details 

Next Cancel 

Next Cancel

- Give the Rule name : Matching customer details

0. Unique name : is auto populated

0. Define the matching criteria as

0. Field	Matching Method
----------	-----------------

1. Gmail	Exact
----------	-------

2. Phone Number	Exact
-----------------	-------

0. Click save.

0. After Saving Click on Activate.

Save Cancel

Rule Details

Object: Customer Details
Rule Name: matching Customer data 

Unique Name: matching_Customer_det 

Description:

Matching Criteria

Tell the rule which fields to compare and how.

Field: Gmail	Matching Method: Exact	Match Blank Fields: AND
Field: Phone Number	Matching Method: Exact	Match Blank Fields: AND
-None-	Exact	AND
-None-	Exact	AND
-None-	Exact	

Add Filter Logic... 

Save Cancel 

Matching Rule
matching Customer details

Help for this Page ?

Matching Rule Detail

Edit Delete Clone Activate 

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

To create a Duplicate rule to an Customer details Object

- Go to quick find box in setup and search for Duplicate rules.
- Click on Duplicate rule >> click on New Rule >> select customer details object.

Dupli

DATA

- Duplicate Management
- Duplicate Error Logs
- Duplicate Rules**
- Matching Rules

Did you find what you're looking for? Try using Global Search.

Duplicate Rules

All Duplicate Rules

What Are Duplicate Rules?

View: All Duplicate Rules

Rule Name	Description	New Rule	Matching Rule	Active	Last Modified By	Last Modified Date
Customer Detail duplicate	Identify accounts that duplicate other accounts.	Account	Matching Customer details	<input type="checkbox"/>	g2	10/10/2023
Standard Account Duplicate Rule	Identify contacts that duplicate other contacts and leads.	Appointment	Standard Account Matching Rule	<input checked="" type="checkbox"/>	g2	24/09/2023
Standard Contact Duplicate Rule	Identify leads that duplicate other leads and contacts.	Billing details and feedback	Standard Lead Matching Rule	<input checked="" type="checkbox"/>	g2	24/09/2023
Standard Lead Duplicate Rule	Identify leads that duplicate other leads and contacts.	Contact	Standard Contact Matching Rule	<input checked="" type="checkbox"/>	g2	24/09/2023
		Customer Details				
		Environment				
		Individual				
		Laptop				
		Lead				

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

A | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | Other | All

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

Edit Duplicate Rule
Customer Detail duplicate

Help for this Page ?

Duplicate Rule Edit

Rule Details

Rule Name: Customer Detail duplicate 

Description:

Object: Customer Details

Record Level Security: Enforce sharing rules Bypass sharing rules

Actions

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

Action On Create: Allow Alert Report

Action On Edit: Allow Alert Report

Alert Text: Use one of these records:

Matching Rules

Define how duplicate records are identified.

Compare Customer Details With: Customer Details 

Matching Rule: matching Customer details 

Matching Criteria: (Customer Details: Email EXACT MatchBlank = FALSE) AND (Customer Details: Phone_Number EXACT MatchBlank = FALSE)

Field Mapping: Mapping Selected

Add Rule Remove Rule

Conditions

Optional, specify the conditions a record must meet for the rule to run.

Field	Operator	Value	AND
--None--	--None--	<input type="text"/>	AND
--None--	--None--	<input type="text"/>	AND
--None--	--None--	<input type="text"/>	AND
--None--	--None--	<input type="text"/>	AND

Add Filter Logic... 

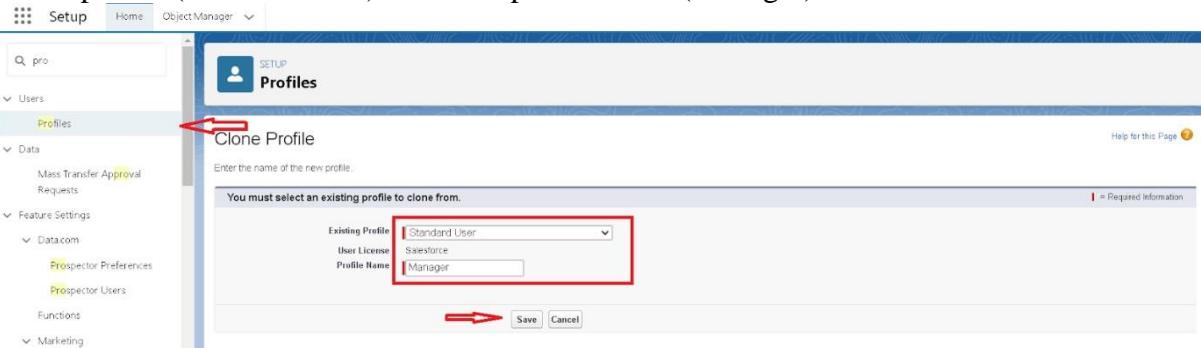
Save Save & New Cancel

Step 20: Profiles

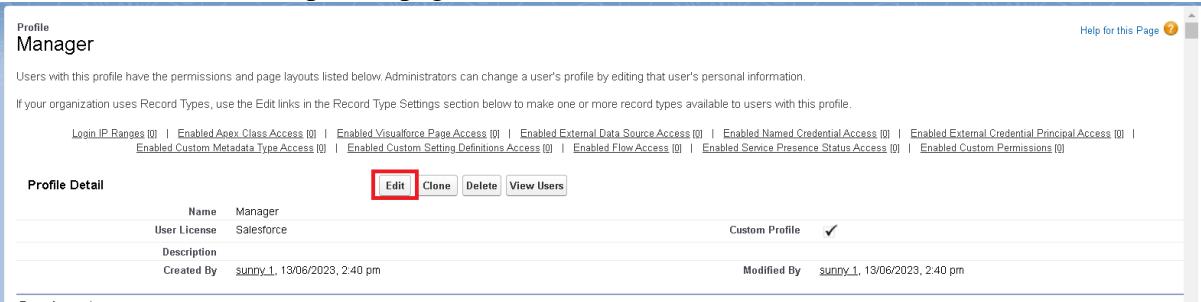
Manager Profile

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.



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

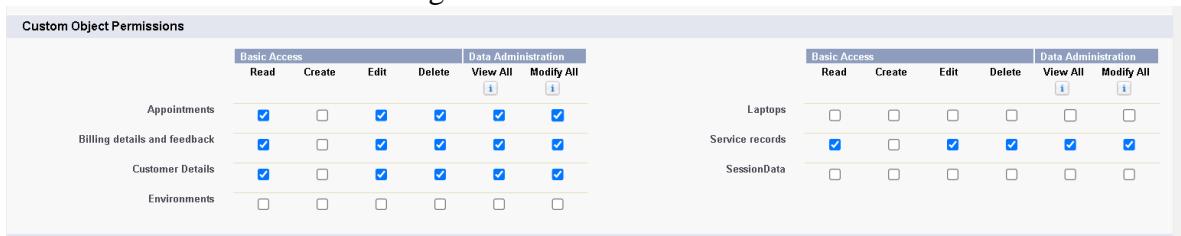


Name	Manager
User License	Salesforce
Description	
Created By	sunny_1, 13/06/2023, 2:40 pm
Modified By	sunny_1, 13/06/2023, 2:40 pm

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



0. 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.



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

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

Sales Person Profile

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

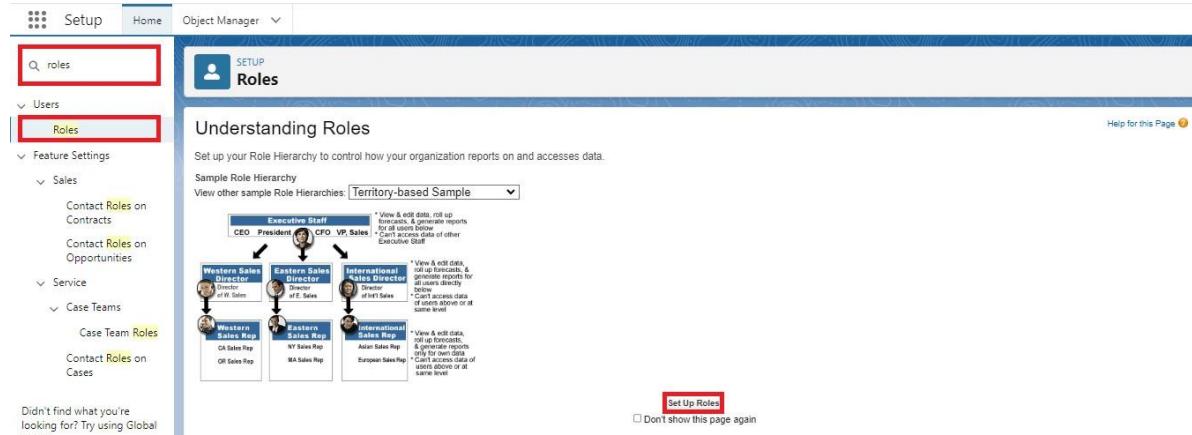
Custom Object Permissions											
	Basic Access				Data Administration						
	Read	Create	Edit	Delete	View All	Modify All					
Appointments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>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

0. And click save.

Step 21: Role & Role Hierarchy

Creating Manager Role:

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



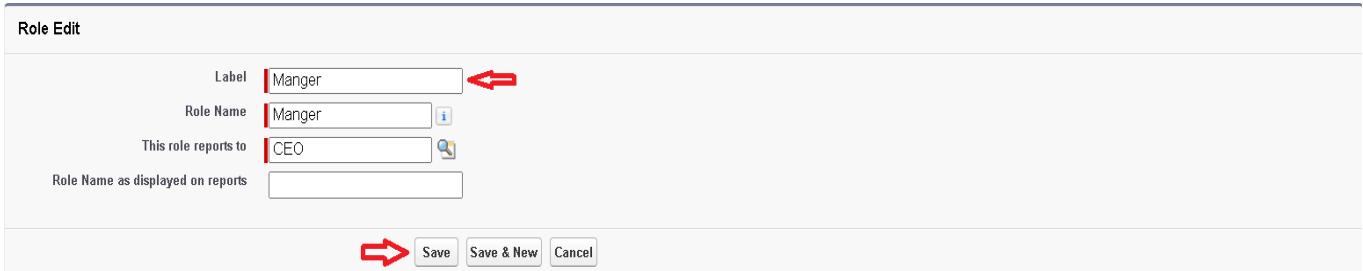
The screenshot shows the Salesforce Setup interface. In the top navigation bar, 'Setup' is selected. On the left, the 'Roles' tab is highlighted under the 'Users' category. A sample role hierarchy diagram titled 'Territory-based Sample' is shown, illustrating a hierarchy from 'Executive Staff' down to 'Sales Reps'. At the bottom right of the page, there is a red box around the 'Set Up Roles' button.

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



The screenshot shows the 'Your Organization's Role Hierarchy' page. At the top left, there is a 'Collapse All' and 'Expand All' button, with 'Expand All' highlighted by a red box. Below this, a tree view of roles is displayed under 'Nick Enterprises'. Each role node has an 'Add Role' button next to it, also highlighted by a red box. The roles listed include CEO, HR, Manager, On Site Emp, and Remote Emp.

0. Give Label as “Manager” and Role name gets auto populated. Then click on Save.



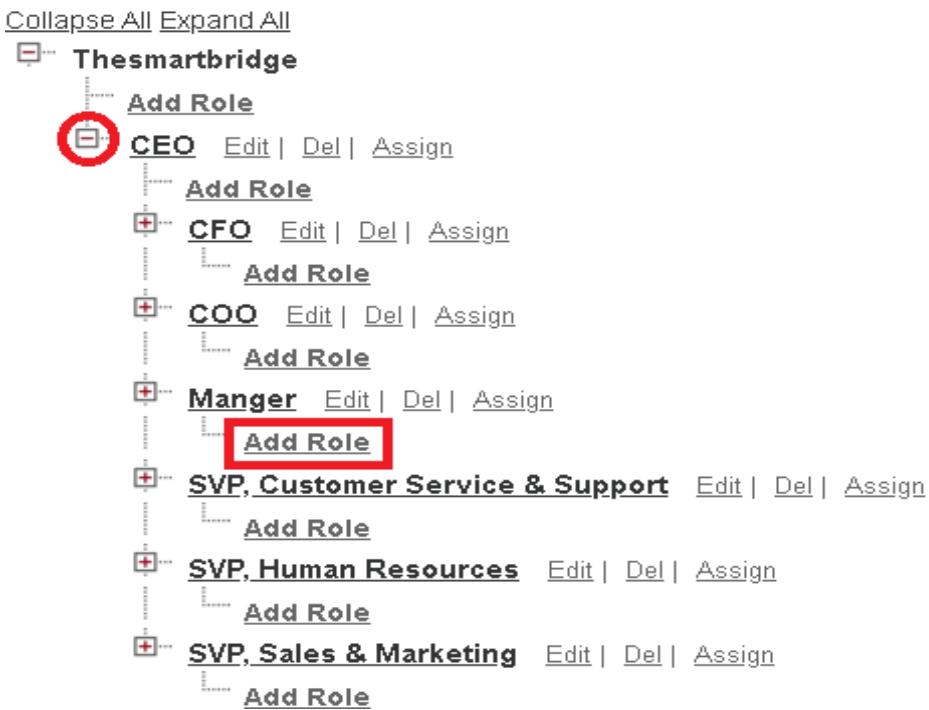
The screenshot shows the "Role Edit" page. It has four input fields: "Label" (containing "Manger" with a red arrow pointing to it), "Role Name" (containing "Manger" with a blue arrow pointing to it), "This role reports to" (containing "CEO" with a blue arrow pointing to it), and "Role Name as displayed on reports" (empty). Below the fields are three buttons: a red double-headed arrow icon, "Save" (disabled), "Save & New" (disabled), and "Cancel".

Creating Another Roles

Creating another two roles under manager

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

Collapse All Expand All



The screenshot shows a hierarchical list of roles under "Thesmartbridge". The "CEO" role is circled in red. Under "CEO", there is an "Add Role" button. The "Manger" role is also circled in red. Under "Manger", there is an "Add Role" button highlighted with a red box. Other roles listed include "CFO", "COO", "SVP, Customer Service & Support", "SVP, Human Resources", and "SVP, Sales & Marketing", each with their own "Edit | Del | Assign" links and an "Add Role" button.

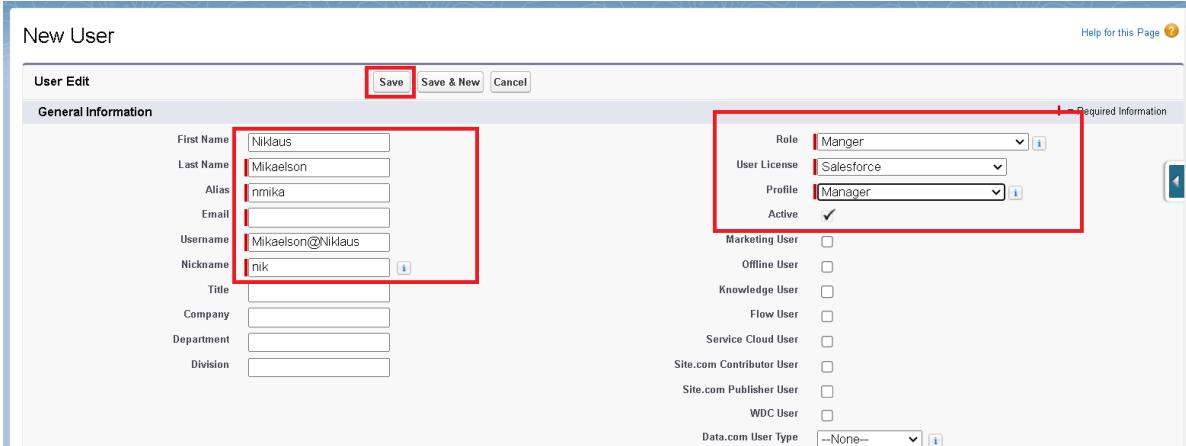
0. Give Label as “sales person” and Role name gets auto populated. Then click on Save.

Step 22: Users

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



0. Save.

Creating Another Users

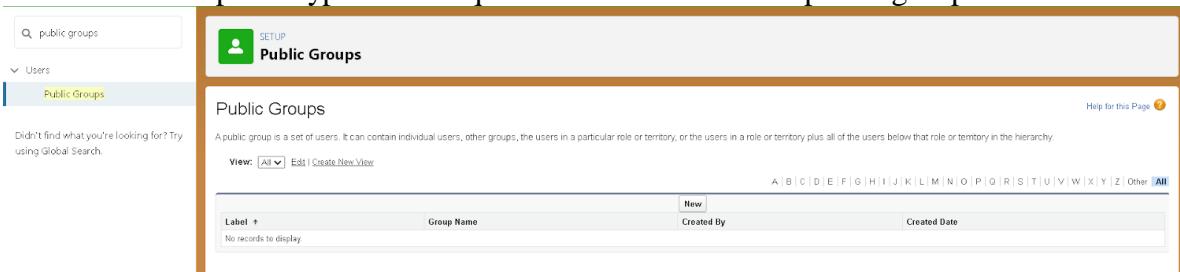
1. Repeat the steps and create another user using
 - . Role : sales person
 - . User licence : Salesforce Platform
 - . Profile : sales person

Note :**create atleast 3 users with these permissions.**

Step 23: Public Group

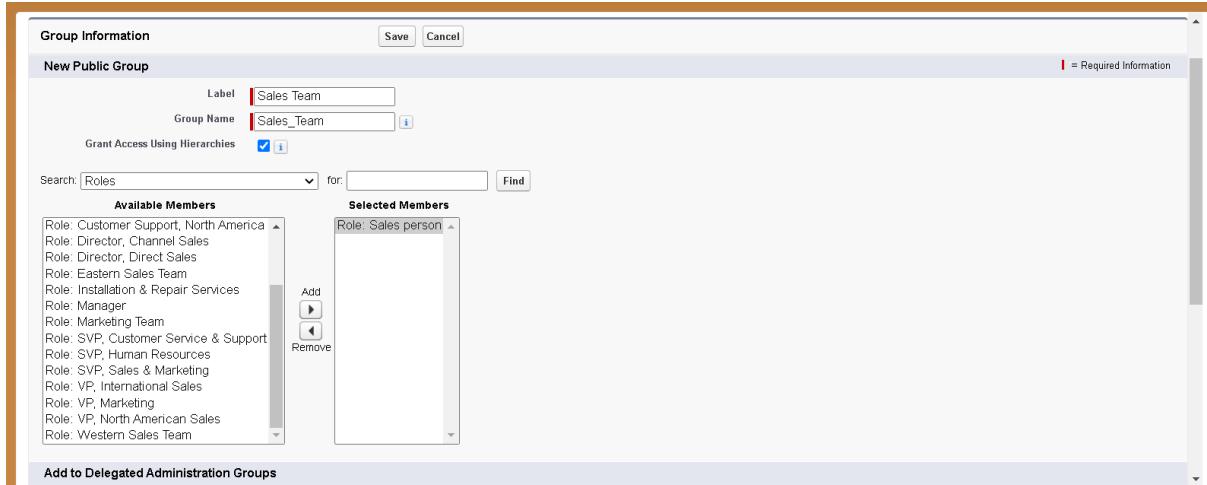
Creating New Public Group

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



0. Give the Label as "sales team".

0. Group name is autopopulated.
0. Search for Roles.
0. In Available Members select Sales person and click on add it will be moved to selected member.
0. Click on save.



Group Information

New Public Group

Label:

Group Name:

Grant Access Using Hierarchies:

Search: Roles for: Find

Available Members

- Role: Customer Support, North America
- Role: Director, Channel Sales
- Role: Director, Direct Sales
- Role: Eastern Sales Team
- Role: Installation & Repair Services
- Role: Manager
- Role: Marketing Team
- Role: SVP, Customer Service & Support
- Role: SVP, Human Resources
- Role: SVP, Sales & Marketing
- Role: VP, International Sales
- Role: VP, Marketing
- Role: VP, North American Sales
- Role: Western Sales Team

Selected Members

- Role: Sales person

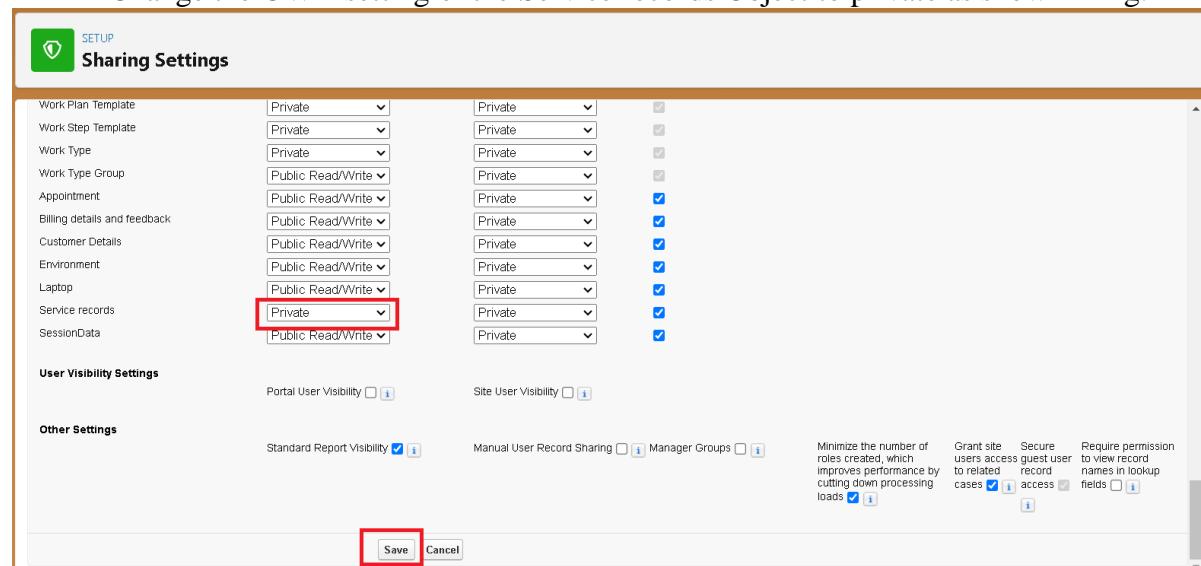
Add Remove

Add to Delegated Administration Groups

Step24 : Sharing Setting

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.



Sharing Settings

Object	OWD	
Work Plan Template	Private	Private
Work Step Template	Private	Private
Work Type	Private	Private
Work Type Group	Public Read/Write	Private
Appointment	Public Read/Write	Private
Billing details and feedback	Public Read/Write	Private
Customer Details	Public Read/Write	Private
Environment	Public Read/Write	Private
Laptop	Public Read/Write	Private
Service records	Private	Private
SessionData	Public Read/Write	Private

User Visibility Settings

Portal User Visibility Site User Visibility

Other Settings

Standard Report Visibility Manual User Record Sharing Manager Groups

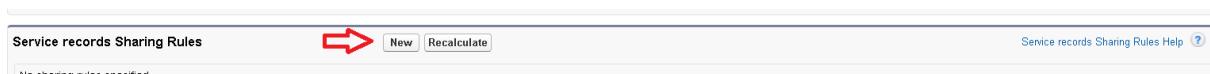
Minimize the number of roles created, which improves performance by cutting down processing loads

Grant site users access to related cases Secure guest user record access Require permission to view record names in lookup fields

Save Cancel

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

0.



Service records Sharing Rules

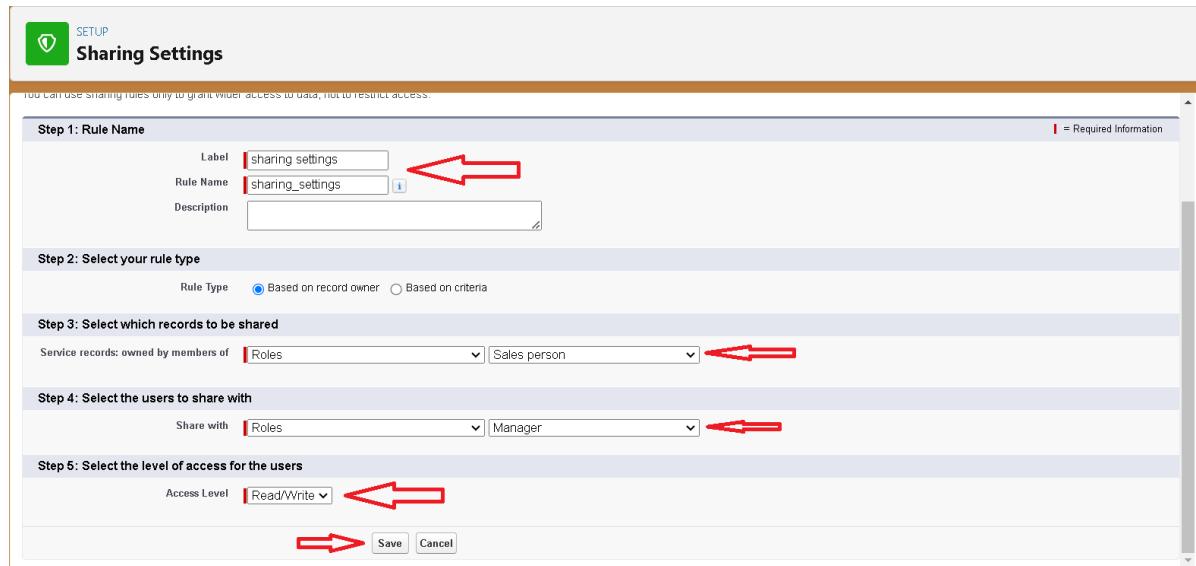
New Recalculate

No sharing rules specified.

Service records Sharing Rules Help ?

0. Give the Label name as " Sharing setting"

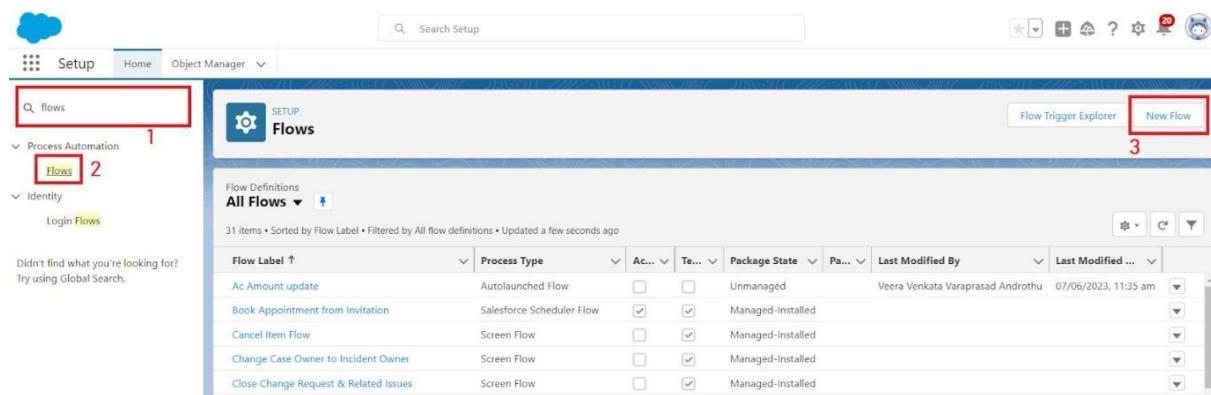
0. Rule name is auto populated.
0. In step 3 : Select which records to be shared, members of “ Roles ” >> “ Sales person”
0. In step 4: share with, select “ Roles ” >> “ Manager ”
0. In step 5 : Change the access level to “ Read / write ”
0. Click on save.



Step 25: Flows

Create a flow

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



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

New Flow

Core All + Templates

Screen Flow 	Record-Triggered Flow 
Schedule-Triggered Flow 	Platform Event—Triggered Flow 
Autolaunched Flow (No Trigger) 	Record-Triggered Orchestration 

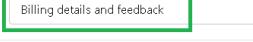
1

2 

0. Select the Object as “Billing details and feedback” in the Drop down list.
0. Select the Trigger Flow when: “A record is Created or Updated”.
0. Select the Optimize the flow for: “Actions and Related Records” and Click on Done.

Configure Start

Select Object
Select the object whose records trigger the flow when they're created, updated, or deleted.

*Object
 

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.

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

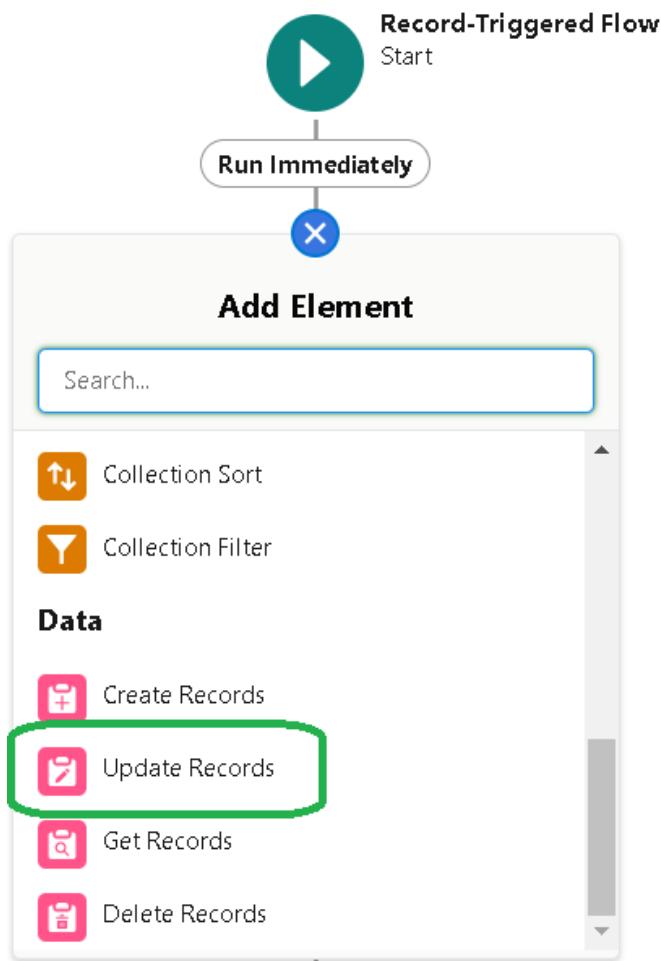
Condition Requirements

*Optimize the Flow for:
Fast Field Updates
Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.
Actions and Related Records
Update any record and perform actions, like send an email. This more flexible flow runs *after* the record is saved to the database. 
 Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed 

3

4 

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



0. Give the Label Name : Amount Update
0. 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

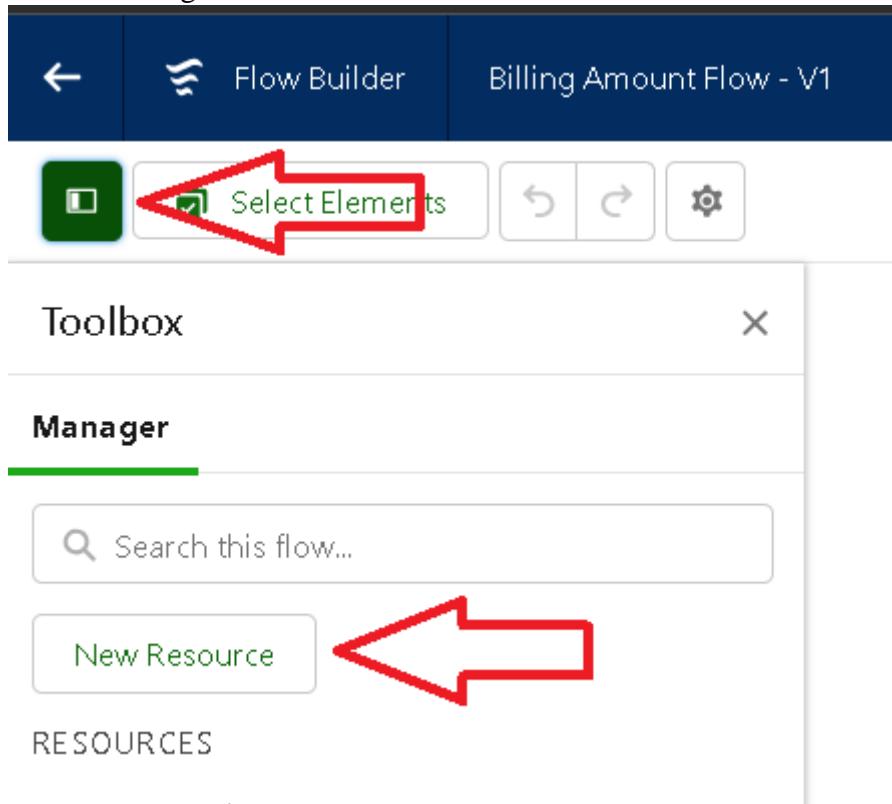
Field	Value
Payment_Paid__c	\$Record > Service records > Appointment > Service A... X

+ Add Field

Cancel **Done**

0. Set a filter condition : All Conditions are met(AND)
0. Field : Payment_Status__c
0. Operator : Equals
0. Value : Completed
0. And Set Field Values for the Billing details and feedback Record
0. Field : Payment_Paid__c
0. Value : {\$Record.Service_records__r.Appointment__r.Service_Amount__c}
0. Click On Done.

0. Before creating another Element. Create a New Resource form Toolbox form top left.



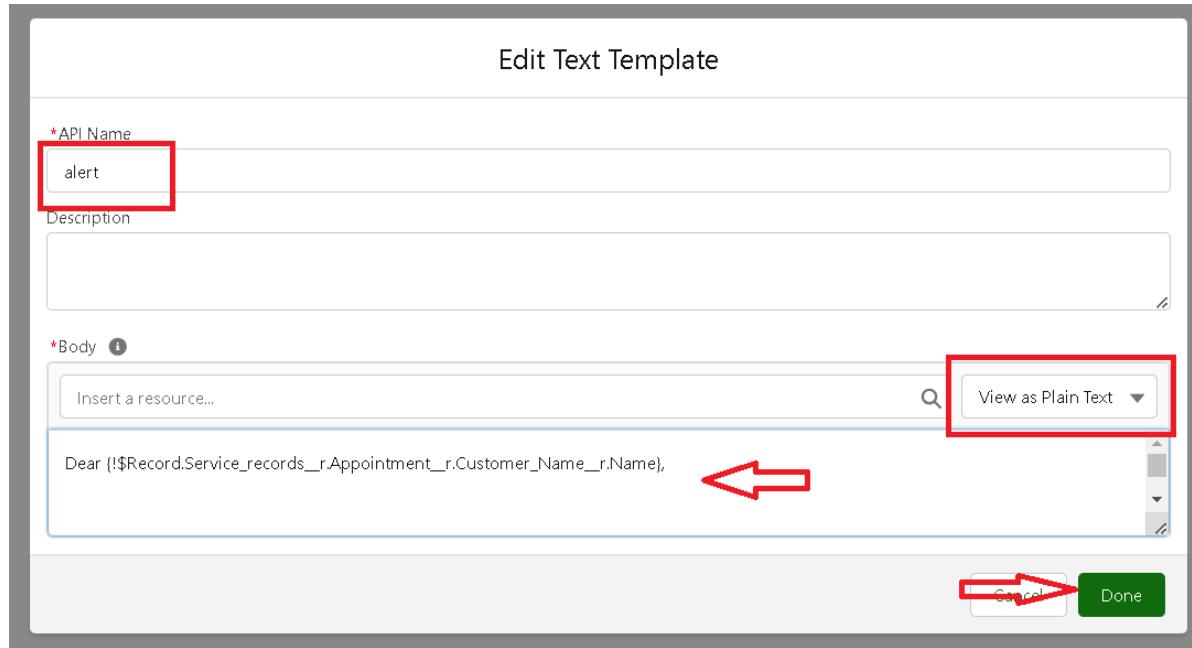
0. Click on the New Resource, And select Variable.
0. Select the resource type as text template.
0. Enter the API name as “alert”.
0. Change the view as Rich Text ? View to Plain Text.
0. In body field paste the syntax that given below.

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 .

0. Click done.



0. Now Click on Add Element , select Action.
0. Their action bar will be opened in that search for “ send email ” and click on it.
0. Give the label name as “ Email Alert”
0. API name will be auto populated.
0. Enable the body in set input values for the selected action.
0. Select the text template that created , Body : { !alert }
0. Include recipient address list select the email form the record.
0. RecipientAddressList:
{ !\$Record.Service_records__r.Appointment__r.Customer_Name__r.Gmail__c }
0. Include subject as “ Thank You for Your Payment - Garage Management”.
0. 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
Email Alert	Email_Alert

Description

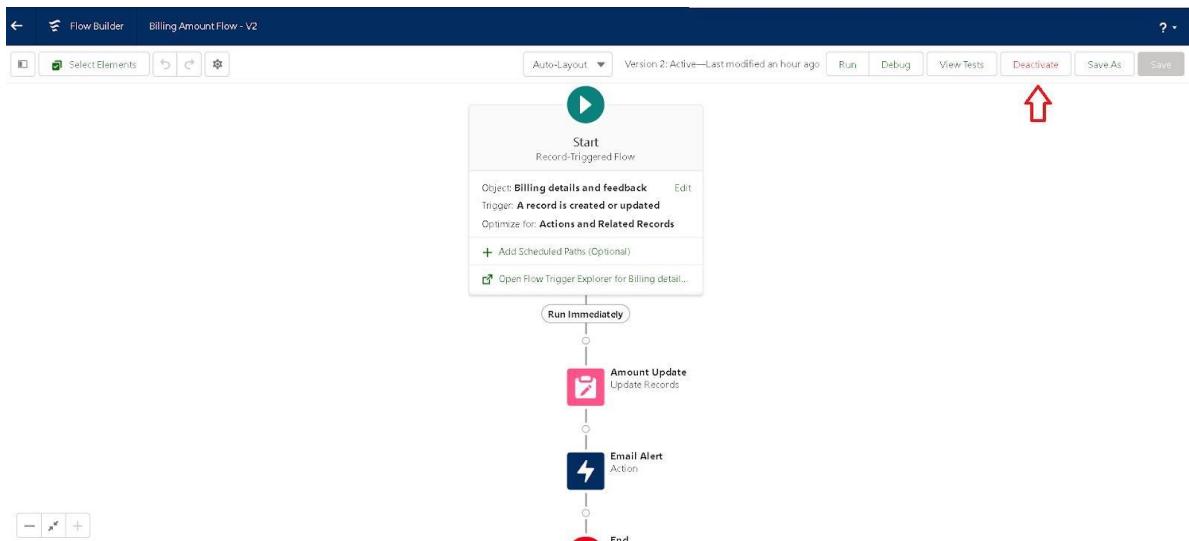
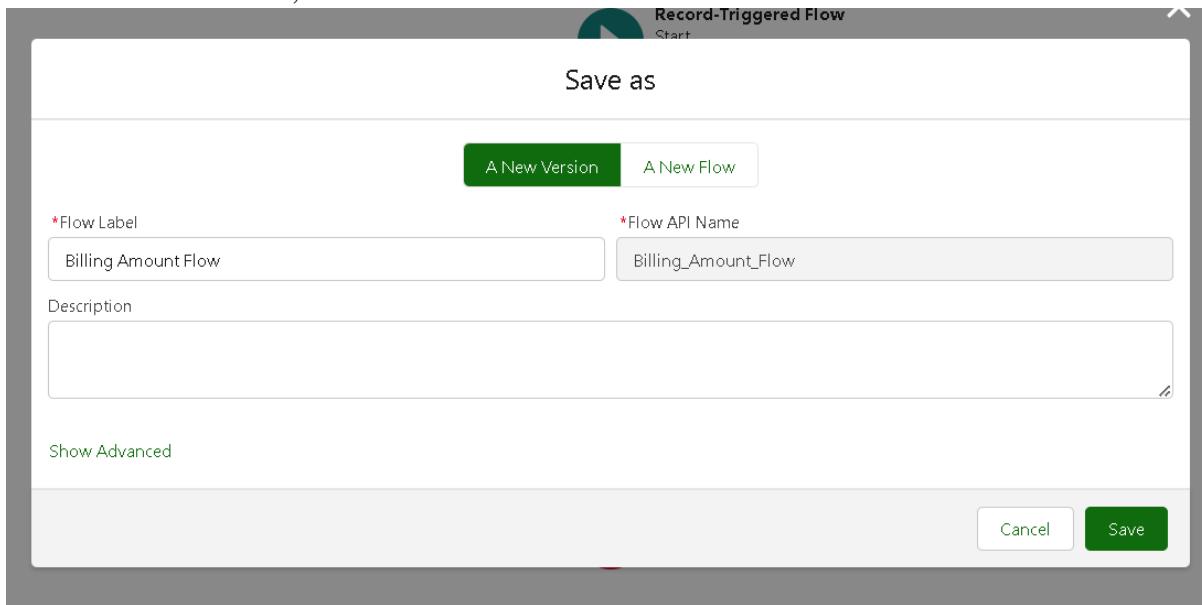
Set Input Values for the Selected Action

A_a Body ⓘ	<input checked="" type="checkbox"/> Include <input type="checkbox"/> Don't Include
{!alert}	
A_a Email Template ID	
A_a Log Email on Send	

Edit Action	
A_a Recipient Address List ⓘ	<input checked="" type="checkbox"/> Include <input type="checkbox"/> Don't Include
{!\$Record.Service_records__r.Appointment__r.Cus}	
A_a Recipient ID	
A_a Related Record ID	
A_a Rich-Text-Formatted Body	
A_a Sender Email Address	
A_a Sender Type	
A_a Subject ⓘ	<input checked="" type="checkbox"/> Include <input type="checkbox"/> Don't Include
Thank You for Your Payment - Garage Manageme	

0. Click on save. Give the Flow label , Flow Api name will be autopopulated.

0. And click save, and click on activate.



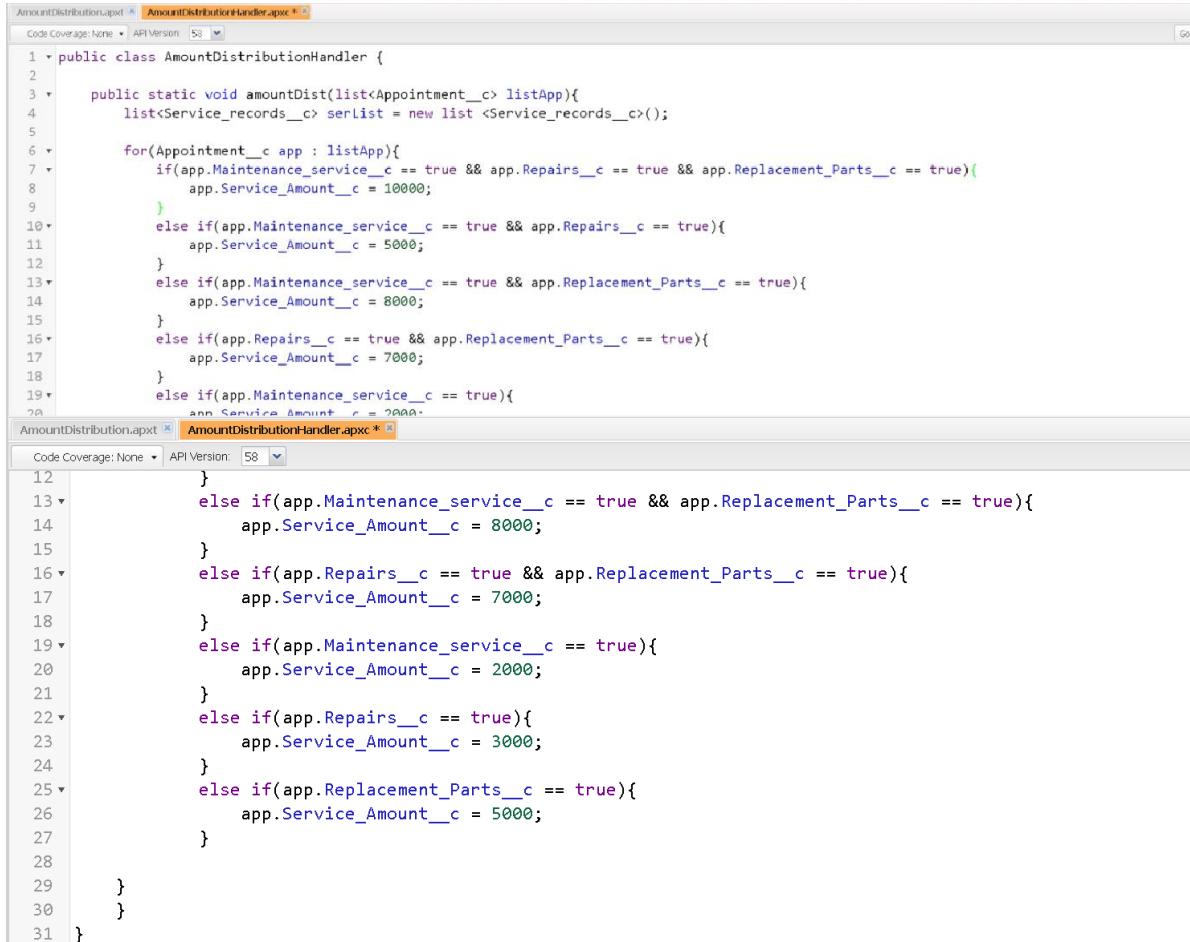
Step 26: Apex Trigger

Apex Handler

UseCase : 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”.



```

1 public class AmountDistributionHandler {
2
3   public static void amountDist(list<Appointment_c> listApp){
4     list<Service_records_c> serList = new list <Service_records_c>();
5
6     for(Appointment_c app : listApp){
7       if(app.Maintenance_service_c == true && app.Repairs_c == true && app.Replacement_Parts_c == true){
8         app.Service_Amount_c = 10000;
9       }
10      else if(app.Maintenance_service_c == true && app.Repairs_c == true){
11        app.Service_Amount_c = 5000;
12      }
13      else if(app.Maintenance_service_c == true && app.Replacement_Parts_c == true){
14        app.Service_Amount_c = 8000;
15      }
16      else if(app.Repairs_c == true && app.Replacement_Parts_c == true){
17        app.Service_Amount_c = 7000;
18      }
19      else if(app.Maintenance_service_c == true){
20        app.Service_Amount_c = 2000;
21      }
22    }
23  }
24
25  else if(app.Maintenance_service_c == true && app.Replacement_Parts_c == true){
26    app.Service_Amount_c = 8000;
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;
}

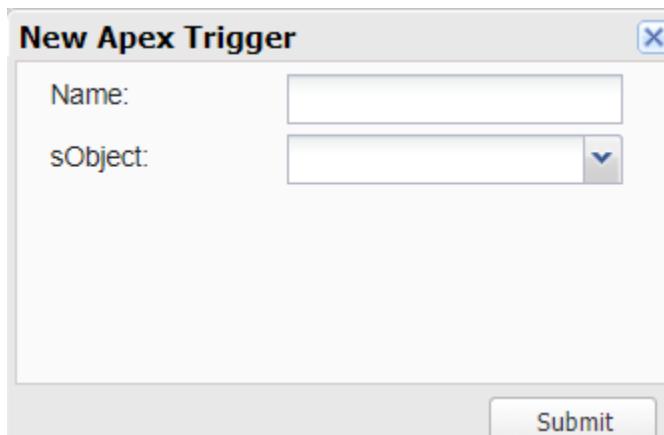
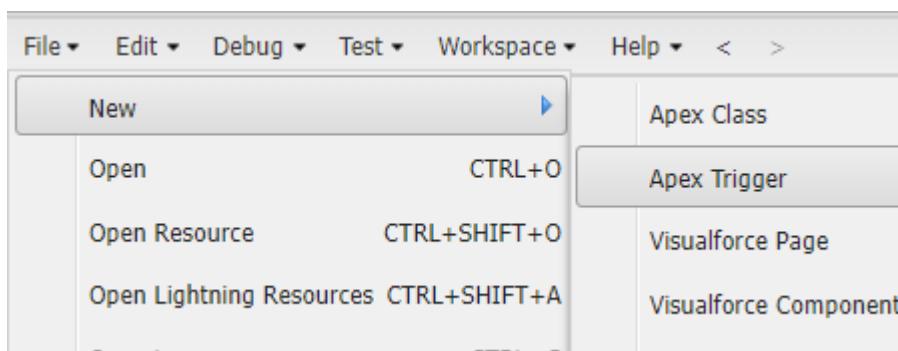
}
}
}

```

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



Syntax For creating trigger :

The syntax for creating trigger is :

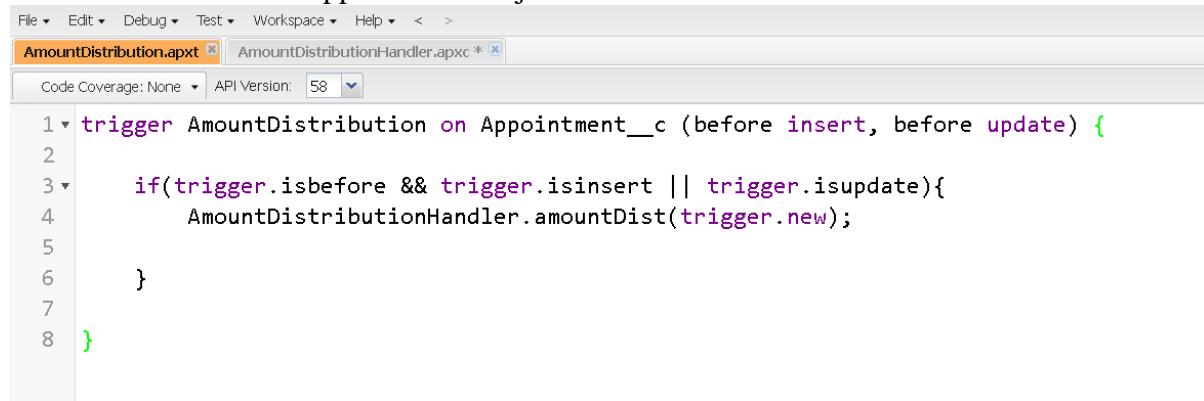
Trigger [trigger name] on [object name](Before/After event)

{

}

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



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

Code:

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

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

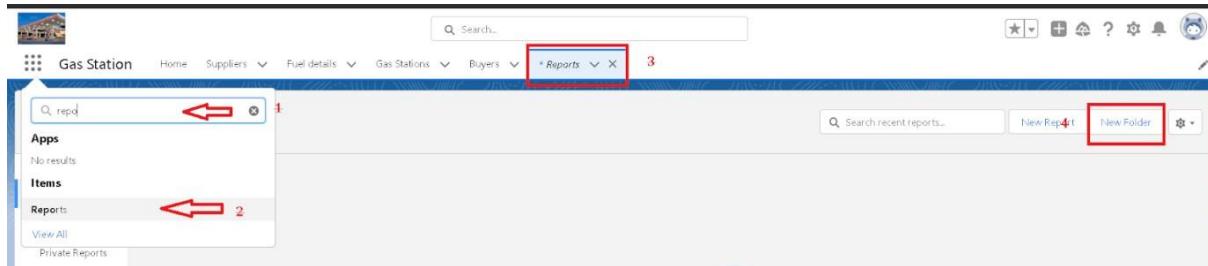
    }

}
```

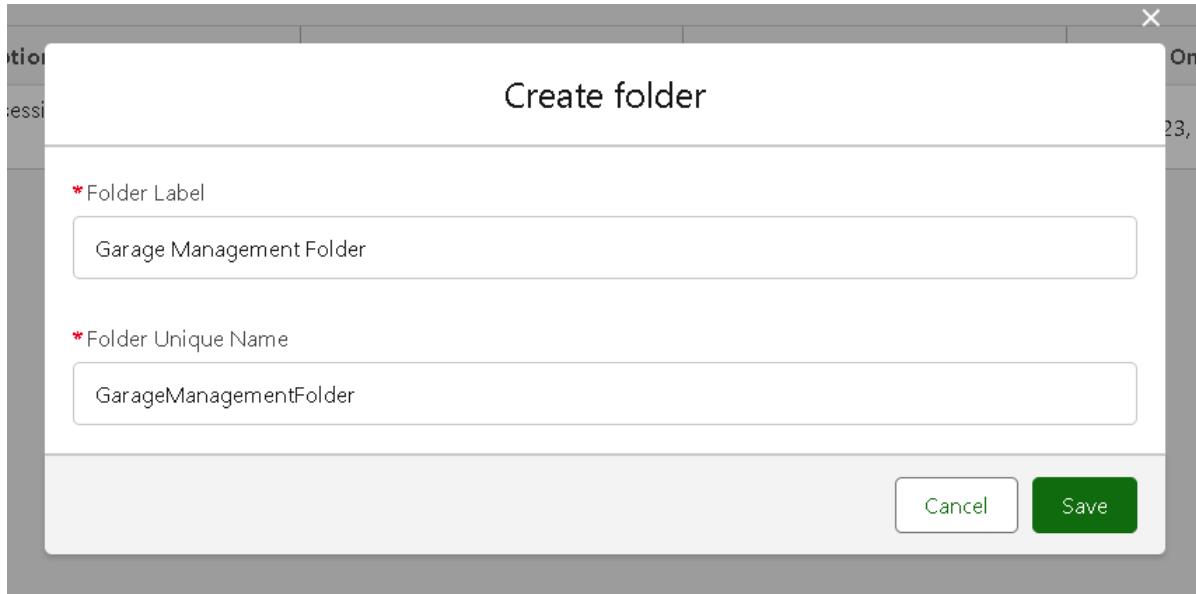
Step 27 : Reports

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.

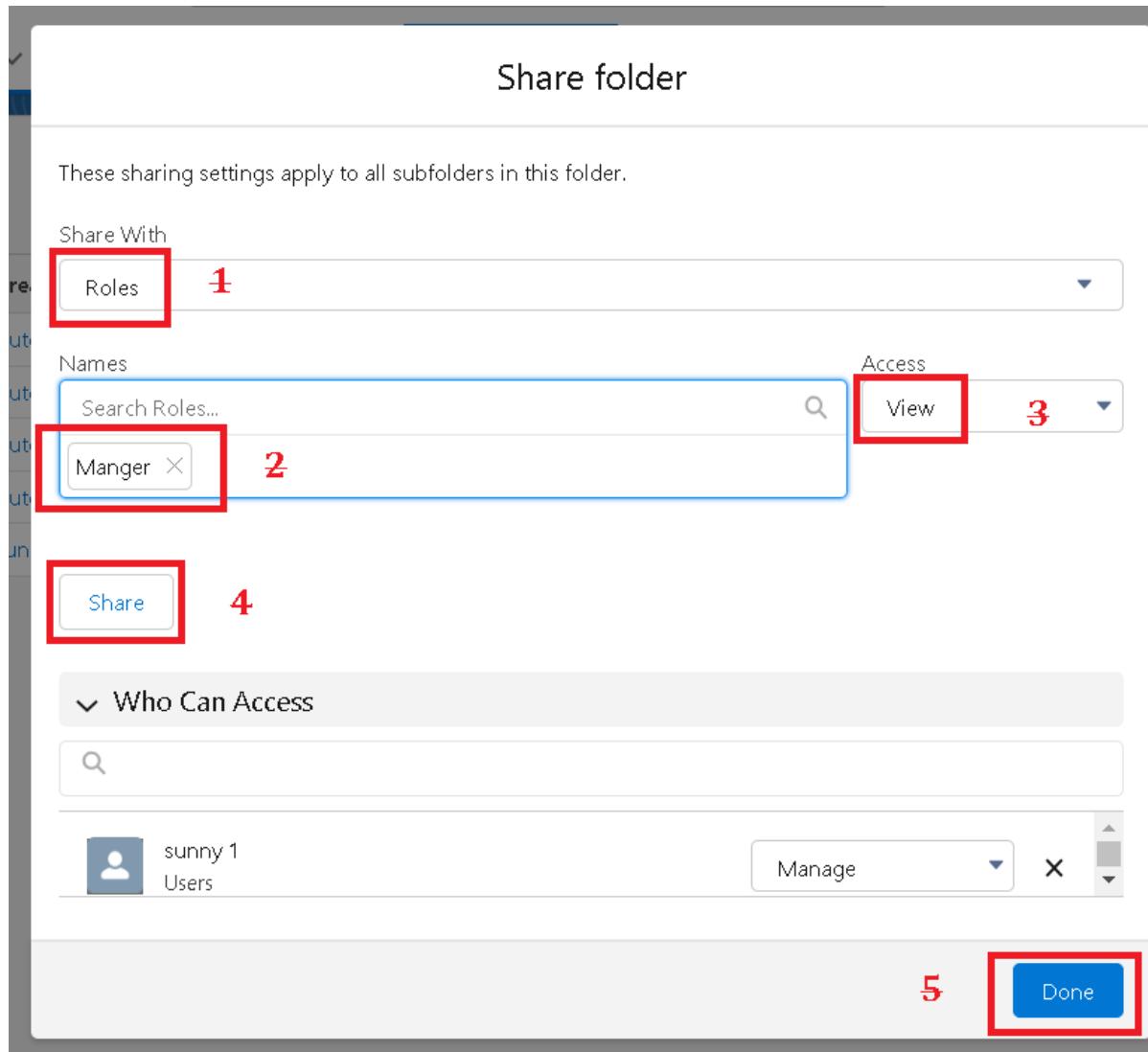


0. Give the Folder label as “Garage Management Folder”, Folder unique name will be auto populated.
0. Click save.



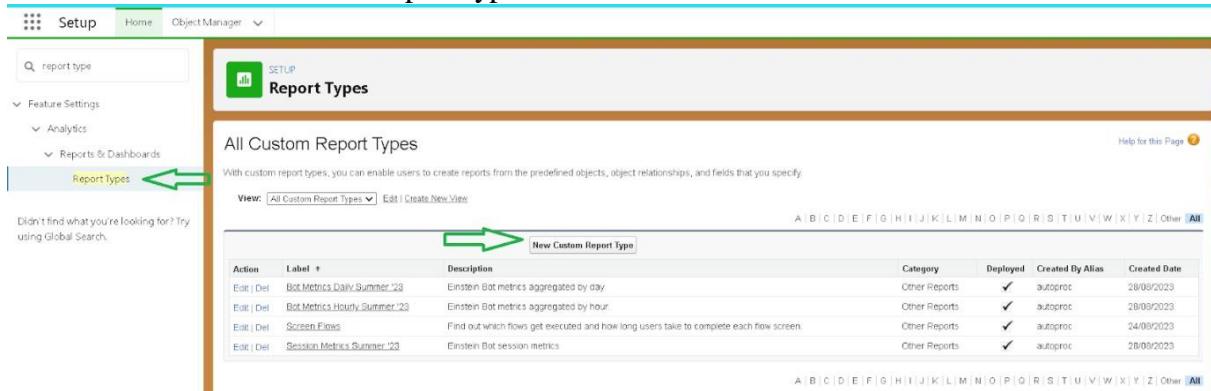
2.Sharing a report folder

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.



3. Create a 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.



Setup Home Object Manager

report type

SETUP Report Types

All Custom Report Types

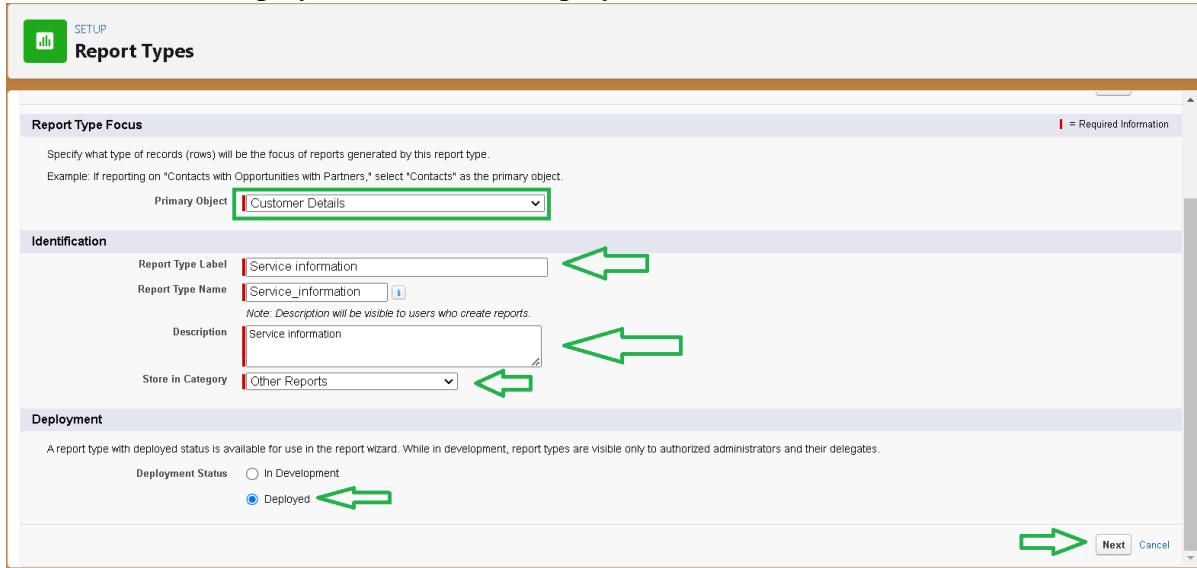
With custom report types, you can enable users to create reports from the predefined objects, object relationships, and fields that you specify.

View: All Custom Report Types | Edit | Create New View

Action	Label	Description	Category	Deployed	Created By Alias	Created Date
Edit Del	Bot Metrics Daily Summer '23	Einstein Bot metrics aggregated by day.	Other Reports	✓	autoproc	28/09/2023
Edit Del	Bot Metrics Hourly Summer '23	Einstein Bot metrics aggregated by hour.	Other Reports	✓	autoproc	28/09/2023
Edit Del	Screen Flows	Find out which flows get executed and how long users take to complete each flow screen.	Other Reports	✓	autoproc	24/09/2023
Edit Del	Session Metrics Summer '23	Einstein Bot session metrics.	Other Reports	✓	autoproc	28/09/2023

0. Select the Primary object as “Customer details” .
0. Give the Report type Label as “Service information ”
0. Report type Name is autopopulated.

0. Keep the Description as same.
0. Select Store in Category as “other Reports”
0. 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 with Partners," select "Contacts" as the primary object.

Primary Object: Customer Details

Identification

Report Type Label: Service information

Report Type Name: Service_information

Description: Service information

Store in Category: Other Reports

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: Deployed

Next Cancel

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



New Custom Report Type

Help for this Page

Step 2 of 2

Service information

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 returned in report results by choosing a relationship to another object.

A Customer Details
Primary Object

B Select Object --Select Object--
Activities
Appointments
Duplicate Record Items

at one related "B" record
related "B" records.

A B

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 returned in report results by choosing a relationship to another object.

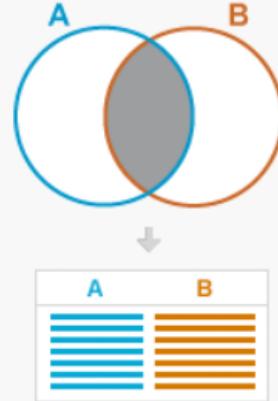
A Customer Details
Primary Object

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.

(Click to relate another object)



The diagram shows two overlapping circles labeled A and B. The intersection area is shaded grey, representing the records that are both A and B. An arrow points down to a grid below.

A	B

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

SETUP 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:

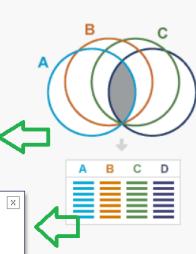
- Each "B" record must have at least one related "C" record.
- "B" records may or may not have related "C" records.

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.



The diagram shows three overlapping circles labeled A, B, and C. The intersection area of A, B, and C is shaded grey. Below the circles is a separate row of four boxes labeled A, B, C, and D. Arrows point from the circles to the boxes.

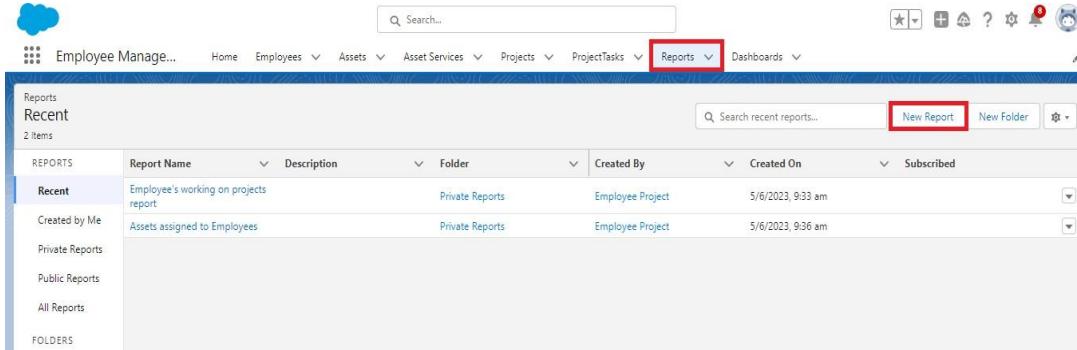
A	B	C	D

Save **Cancel**

4. Create report

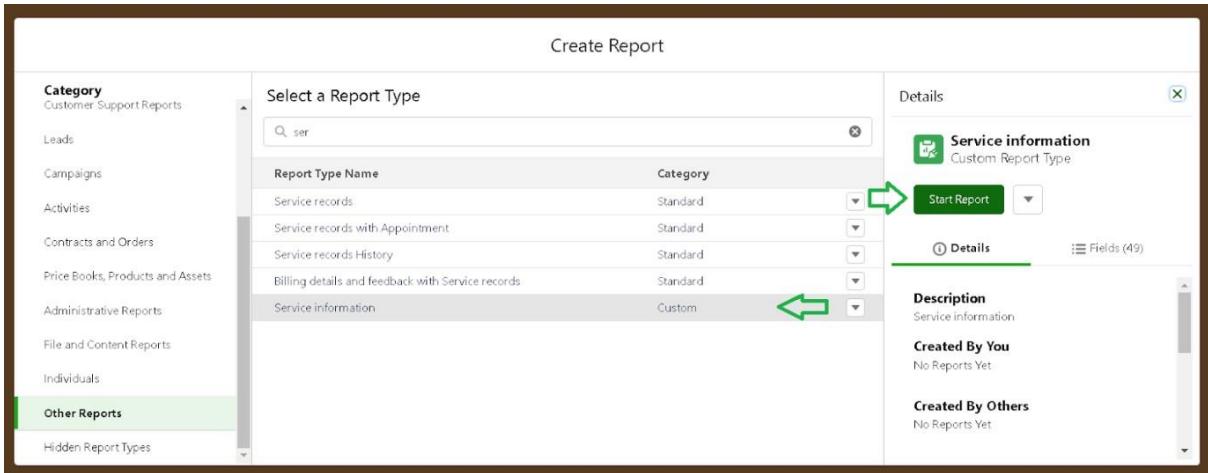
Note : Before creating report, create latest “10” records in every object.
Try to fill every field in each record for better experience.

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



The screenshot shows the 'Employee Manage...' interface. The top navigation bar includes Home, Employees, Assets, Asset Services, Projects, Project Tasks, Reports (which is highlighted with a red box), and Dashboards. Below the navigation is a search bar and a toolbar with various icons. The main content area is titled 'Reports' and shows a table of 'Recent' reports. The table has columns for Report Name, Description, Folder, Created By, Created On, and Subscribed. There are also buttons for 'New Report' and 'New Folder'. On the left, there's a sidebar with categories like Reports, Recent, Folders, and links for Recent, Created by Me, Private Reports, Public Reports, and All Reports.

0. 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. On the left is a sidebar with various report categories. The 'Other Reports' category is highlighted with a green background. The main area is titled 'Select a Report Type' and contains a search bar with 'ser' typed in. Below the search is a list of report types, each with a 'Report Type Name' and a 'Category'. The 'Service information' report type is selected and highlighted with a green arrow. To the right, a 'Details' pane displays the selected report type ('Service information', 'Custom Report Type') and a 'Start Report' button. Below the report type, there are sections for 'Description', 'Created By You', and 'Created By Others'.

0. Their outline pane is opened already, select the fields that mentioned below in column section.
 - . Customer name
 - a. Appointment Date
 - b. Service Status
 - c. Payment paid
0. Remove the unnecessary fields.
0. Select the fields that mentioned below in GROUP ROWS section.
 - . Rating for Service
0. Select the fields that mentioned below in GROUP ROWS section.
 - . Payment Status
0. Click on Add Chart , Select the Line Chart.

0. Click on save, Give the report Name : New Service information Report
0. Report unique Name is auto populated.
0. Select the folder the created and Click on save.

REPORT ▾

New Service information Report ▾ Service information

Fields

Rating for service ▾ Payment Status ▾ Completed Total

	Rating for service	Payment Status	Completed	Total
4	Sum of Payment Paid	₹15,000	₹15,000	
	Record Count	4	4	
5	Sum of Payment Paid	₹5,000	₹5,000	
	Record Count	2	2	
Total	Sum of Payment Paid	₹20,000	₹20,000	
	Record Count	6	6	

Update Preview Automatically

Rating for service

Customer Name Appointment Date Service Status Payment Paid

Customer Name	Appointment Date	Service Status	Payment Paid
1 meghana	11/10/2023	Completed	₹8,000
2 rushi	08/09/2023	Completed	₹3,000
3 shivam	12/10/2023	Completed	₹2,000
4 shivam	12/10/2023	Completed	₹2,000
5 rushi	08/09/2023	Completed	₹3,000

Row Counts Detail Rows Grand Total Stacked Summaries Conditional Formatting

Save Report

*Report Name

Report Unique Name (i)

Report Description

Folder

Select Folder

Cancel Save

Step 28 : Dashboards

1. Create a 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

* Folder Unique Name

Cancel
Save

0. Follow the same steps, from milestone 15, and activity 2, and provide the sharing settings for the folder that just created.

2.Creation 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

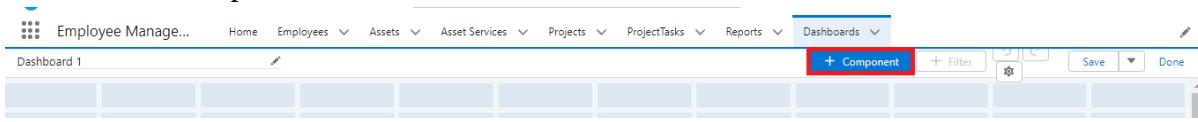
Description

Folder

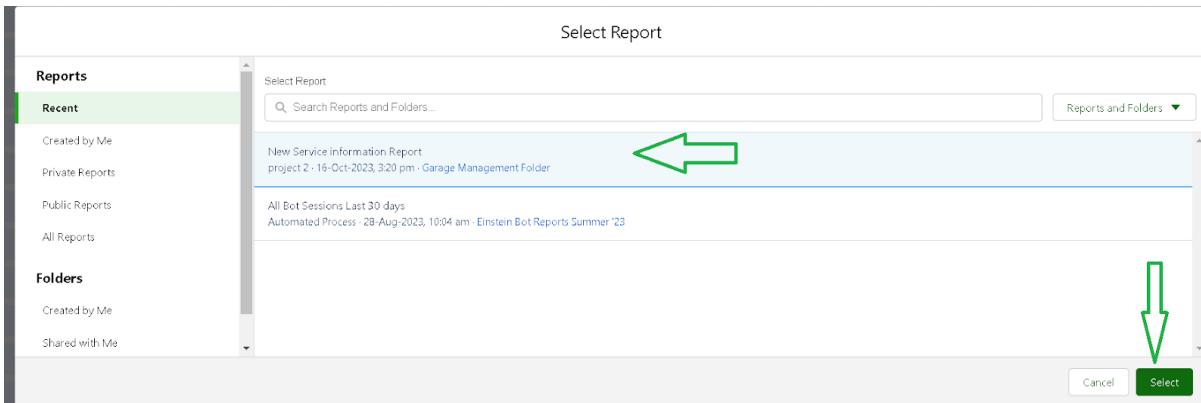
Select Folder

Cancel
Create

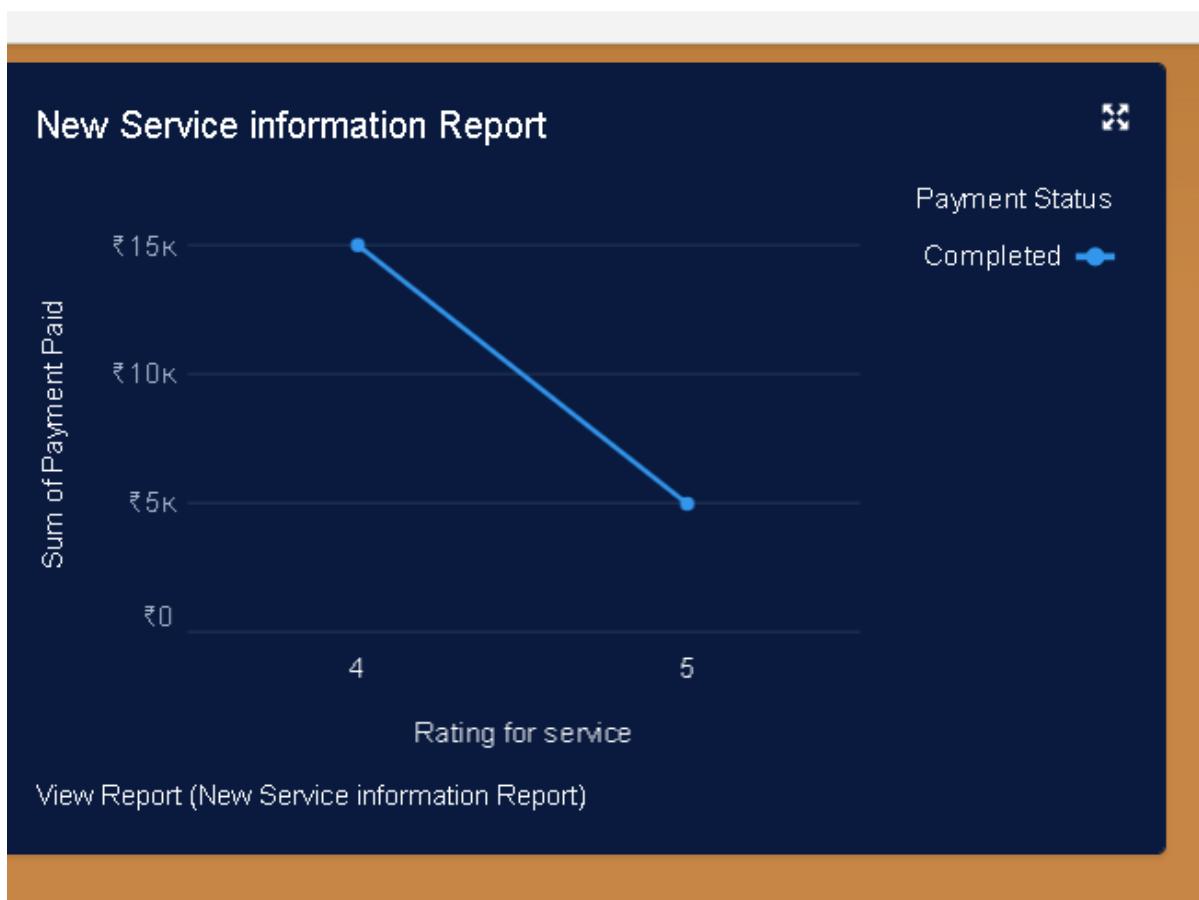
0. Select add component.



0. Select a Report and click on select.



0. Select the Line Chart. Change the theme.
0. Click Add then click on Save and then click on Done.
0. Preview is shown below.



0. After that Click on Subscribe on top right.
0. Set the Frequency as “ weekly ”.
0. Set a day as monday.
0. And Click on save.

Edit Subscription

Schedule dashboard refreshes and subscribe to receive results.

Settings

Frequency

Daily	Weekly	Monthly
-------	--------	---------



Days

Sun	Mon	Tue	Wed	Thu	Fri	Sat
-----	-----	-----	-----	-----	-----	-----



Time

3:00 pm	▼
---------	---

Recipients

Receive new results by email when dashboard is refreshed. i

Send email to

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4. Conclusion

In conclusion, the Garage Management Project implemented in Salesforce offers a comprehensive solution to streamline and enhance the efficiency of garage operations. By leveraging Salesforce's robust platform, the project integrates key business processes such as inventory management, customer service, scheduling, and billing into a unified system. The project has improved data accuracy, real-time reporting, and overall customer satisfaction by providing seamless access to critical information. Furthermore, the automation of routine tasks has reduced manual errors and improved operational efficiency.

With Salesforce's customization capabilities, the system can adapt to the evolving needs of the business, ensuring long-term scalability and growth. The ability to track sales, monitor service requests, and manage customer interactions in a centralized CRM system has significantly boosted the sales team's productivity and customer relationship management.

Overall, the implementation of Salesforce for garage management has proven to be a valuable tool, optimizing operations, enhancing customer engagement, and driving business growth, while setting a strong foundation for future technological advancements in the industry.