

GARAGE MANAGEMENT SYSTEM

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Introduction

A **Garage Management System built on Salesforce** provides a cloud-based solution to streamline these processes. By leveraging Salesforce's CRM capabilities along with custom applications, garages can automate workflows, maintain accurate records, and deliver superior service to customers. Since Salesforce is highly customizable, it allows the garage to track vehicles, manage service requests, monitor spare parts, generate invoices, and build powerful reports all in one unified platform.

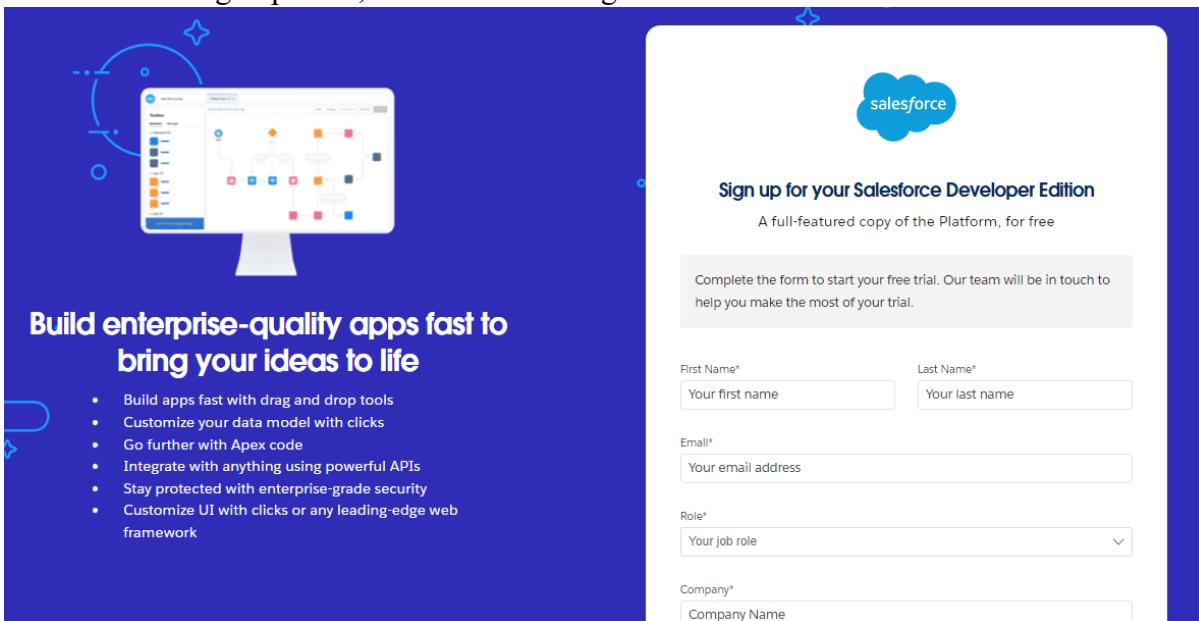
What You Will Learn:

- How to create and customize Salesforce objects (Customer, Vehicle, Service Request, Spare Parts).
- Building a Garage Management App with Lightning App Builder.
- Automating workflows using Flows, Approvals, and Email Alerts.
- Managing data: vehicle history, service records, and spare parts inventory.
- Generating invoices and tracking payments.
- Creating reports and dashboards for garage performance.
- Improving customer experience with reminders and notifications.

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 :



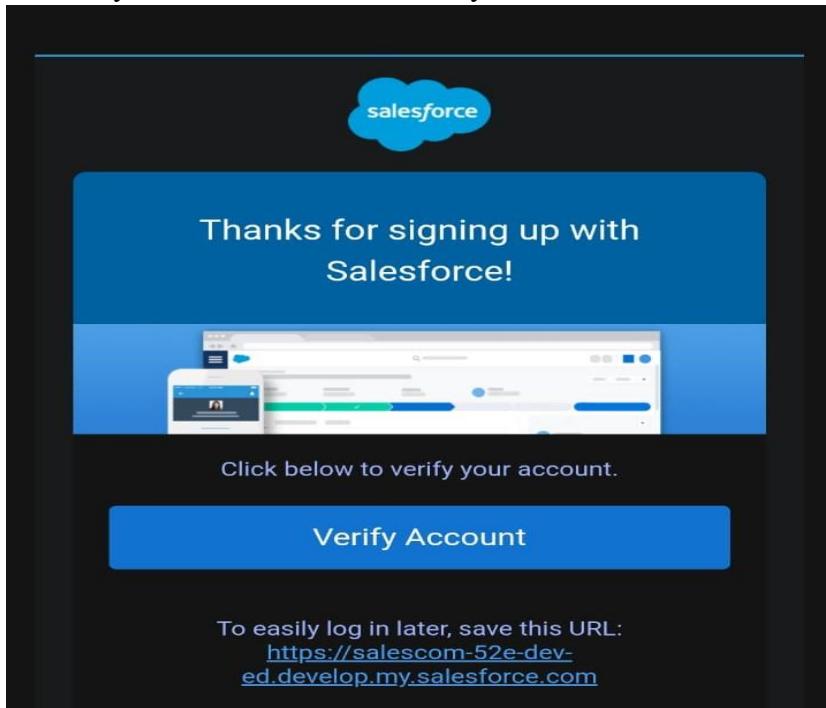
1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

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

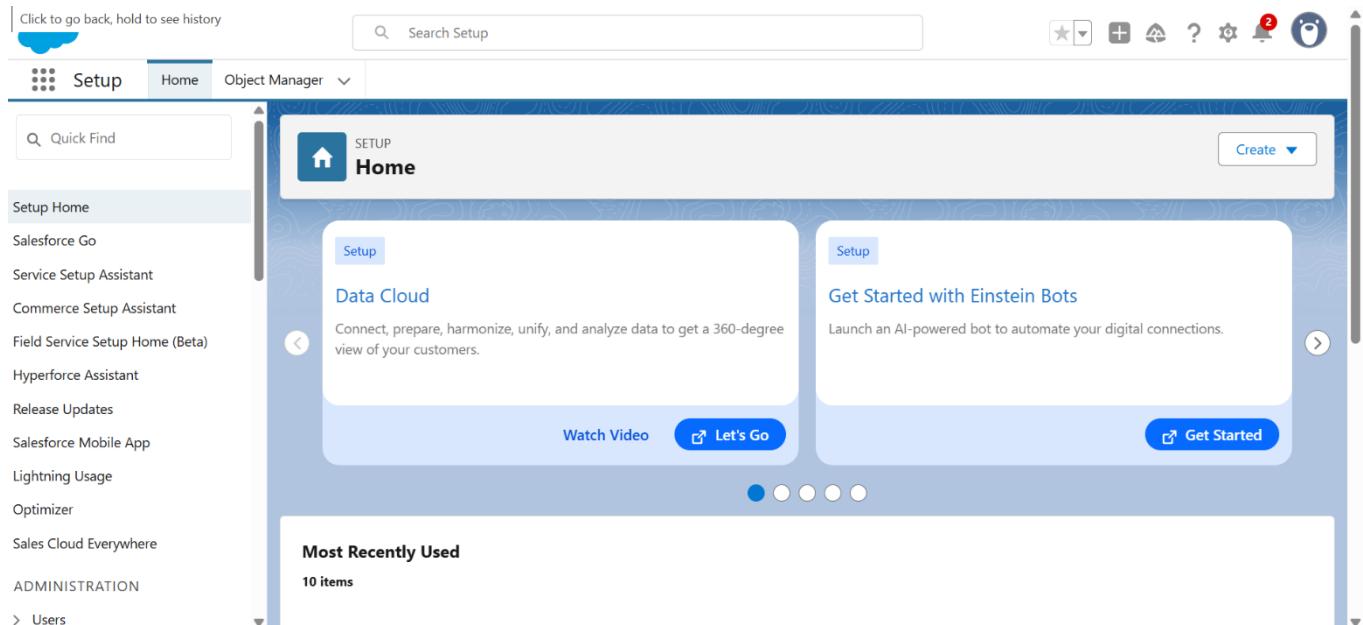
Click on sign me up after filling these.

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



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

Customer Details

Details

Description

API Name
Customer_Details__c

Custom ✓

Singular Label
Customer Details

Plural Label
Customer Details

Enable Reports ✓

Track Activities

Track Field History ✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

Create Appointment Object

To create an object:

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

Appointment

Details

Description

API Name
Appointment__c

Custom ✓

Singular Label
Appointment

Plural Label
Appointments

Enable Reports ✓

Track Activities

Track Field History ✓

Deployment Status
Deployed

Help Settings
Standard salesforce.com Help Window

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.

The screenshot shows the Salesforce Object Manager interface. The URL in the browser is <https://orgfarm-9672c6a01c-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgL0000028VK1/Details/view>. The page title is "Service records". The left sidebar lists various object settings like Fields & Relationships, Page Layouts, and Lightning Record Pages. The main "Details" tab shows the following configuration:

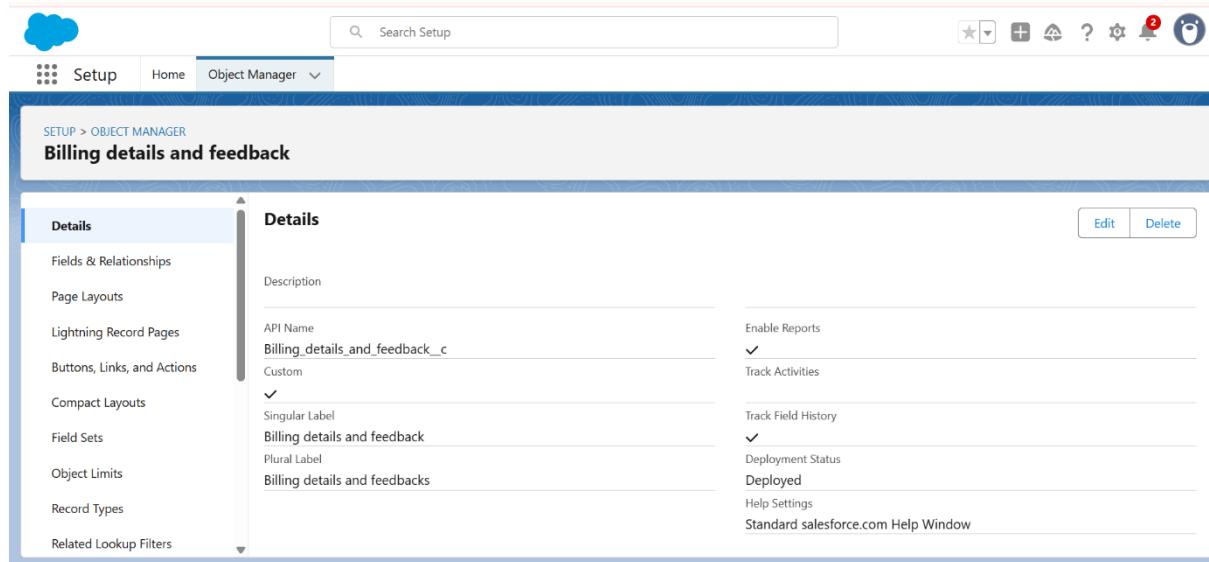
Setting	Value
Description	
API Name	Service_records_c
Custom	✓
Singular Label	Service records
Plural Label	Service records
Enable Reports	✓
Track Activities	
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

The status bar at the bottom shows the weather as "Mostly cloudy" at 29°C, system icons, and the date/time as "13-09-2025 19:09".

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.



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)

The screenshot shows the Salesforce Setup interface with the 'Custom Tabs' page open. The left sidebar has 'User Interface' expanded, with 'Tabs' selected. The main content area displays a table of 'Custom Object Tabs' with the following data:

Action	Label	Tab Style	Description
Edit Del	Appointments	Flag	
Edit Del	Billing details and feedbacks	Headset	
Edit Del	Customer Details	Compass	
Edit Del	Service records	Cup	

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.

The screenshot shows the 'Edit Custom Object Tab' page for 'Customer Details'. The 'Custom Object Tab Information' section includes:

- Tab Label: Customer Details
- Object: Customer Details
- Tab Style: Compass

The 'Custom Tab Definition Edit' section includes:

- (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: --None--
- Enter a short description
Description: [Empty text input field]

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

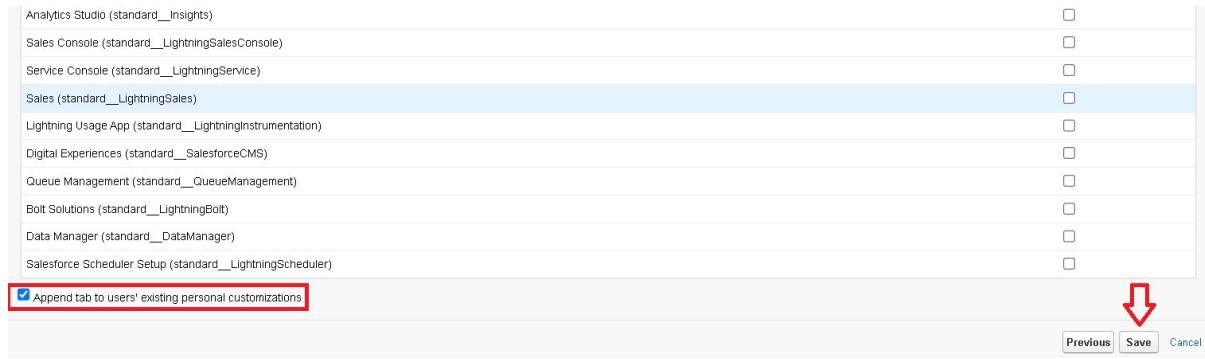
Save **Cancel**

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"/>



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 .

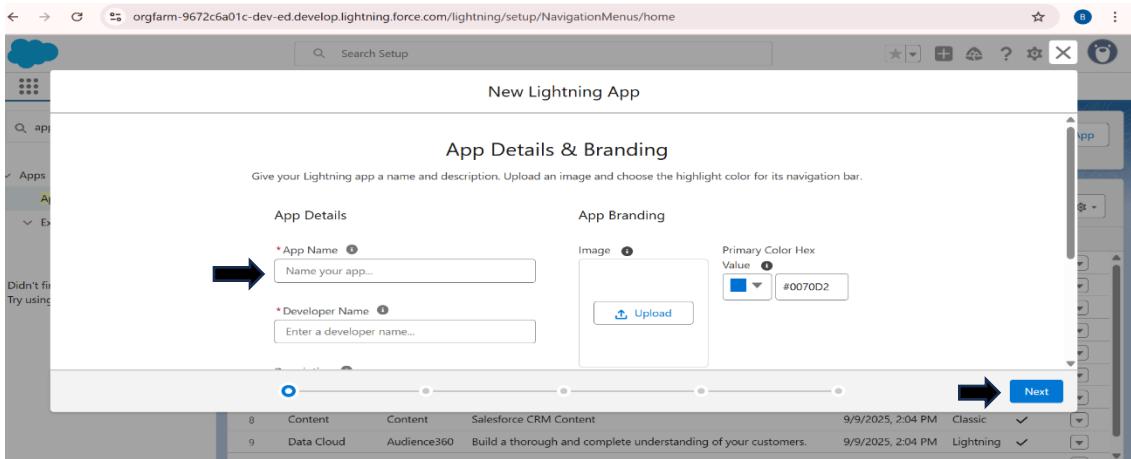
Create a Lightning App

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.

App Name	Developer	Description	Last Modified	App Type	Visibility
All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	9/9/2025, 2:04 PM	Classic	
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	9/9/2025, 2:04 PM	Classic	
App Launcher	AppLauncher	App Launcher tabs	9/9/2025, 2:04 PM	Classic	
Approvals	Approvals	Manage approvals and approval flows	9/9/2025, 2:04 PM	Lightning	
Automation	FlowsApp	Automate business processes and repetitive tasks.	9/9/2025, 2:10 PM	Lightning	
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	9/9/2025, 2:04 PM	Lightning	
Community	Community	Salesforce CRM Communities	9/9/2025, 2:04 PM	Classic	
Content	Content	Salesforce CRM Content	9/9/2025, 2:04 PM	Classic	
Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	9/9/2025, 2:04 PM	Lightning	

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:

Available Items	Selected Items
Accounts	Customer Details
Activation Targets	Service records
Activations	Billing details and feedbacks
All Sites	Reports
Alternative Payment Methods	Dashboards
Analytics	Appointments

After selecting these items click next and proceed.

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:

The screenshot shows the 'App Settings' section of the Lightning App Builder. On the left, there's a sidebar with 'App Details & Branding', 'App Options', and 'Utility Items (Desktop Only)'. The main area is titled 'Navigation Items' and contains two panels: 'Available Items' and 'Selected Items'. The 'Available Items' panel lists various objects like Accounts, Activation Targets, Activations, All Sites, Alternative Payment Methods, and Analytics. The 'Selected Items' panel contains 'Customer Details', 'Service records', 'Billing details and feedbacks', 'Reports', 'Dashboards', and 'Appointments'. Navigation arrows between the panels allow items to be moved.

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

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.

The screenshot shows the 'Object Manager' page in the Salesforce Setup. The search bar at the top contains 'customer'. A table below lists one object: 'Customer Details' (Label), 'Customer_Details_c' (API Name), 'Custom Object' (Type), '9/12/2025' (Last Modified), and a checkmark icon (Deployed). There is also a dropdown arrow icon at the bottom right of the table row.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Customer Details	Customer_Details_c	Custom Object		9/12/2025	✓

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

SETUP > OBJECT MANAGER
Customer

Fields & Relationships
9 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		✓
Created Date	CreatedDate	Date/Time		✓
Customer Status Type	CustomerStatusType	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Last Modified Date	LastModifiedDate	Date/Time		
Name	Name	Text(255)		✓
Owner Name	OwnerId	Lookup(User,Group)		✓
Party	PartyId	Lookup(Individual)		✓

3. Select Data Type as a “Phone”

SETUP > OBJECT MANAGER
Customer

Fields & Relationships

<input type="radio"/> Date/Time	Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
<input type="radio"/> Email	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Send an Email. Note that custom email addresses cannot be used for mass emails.
<input type="radio"/> Geolocation	Allows users to define locations. Includes latitude and longitude components, and can be used to calculate distance.
<input type="radio"/> Number	Allows users to enter any number. Leading zeros are removed.
<input type="radio"/> Percent	Allows users to enter a percentage number, for example, '10' and automatically adds the percent sign to the number.
<input checked="" type="radio"/> Phone	Allows users to enter any phone number. Automatically formats it as a phone number.
<input type="radio"/> Picklist	Allows users to select a value from a list you define.
<input type="radio"/> Picklist (Multi-Select)	Allows users to select multiple values from a list you define.
<input type="radio"/> Text	Allows users to enter any combination of letters and numbers.
<input type="radio"/> Text Area	Allows users to enter up to 255 characters on separate lines.
<input type="radio"/> Text Area (Long)	Allows users to enter up to 131,072 characters on separate lines.
<input type="radio"/> Text Area (Rich)	Allows users to enter formatted text, add images and links. Up to 131,072 characters on separate lines.

4. Click on next.

SETUP > OBJECT MANAGER
Customer

Details
Fields & Relationships **Fields & Relationships**
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters

Step 2. Enter the details Step 2 of 4

Field Label i
 Field Name i
 Description
 Help Text
 Required Always require a value in this field in order to save a record
 Add this field to existing custom report types that contain this entity i
 Default Value Show Formula Editor

Previous Next Cancel

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.

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 includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top right contains the text 'app'. Below the search bar are buttons for 'Schema Builder' and 'Create'. The main area displays a table with columns: 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', 'LAST MODIFIED', and 'DEPLOYED'. There are seven items listed, with the 'Appointment' object highlighted by a red box. The 'Appointment' row shows 'Appointment' as the label, 'Appointment_c' as the API name, 'Custom Object' as the type, and '24/08/2023' as the last modified date.

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

The screenshot shows the 'Fields & Relationships' page for the 'Appointment' object. The top navigation bar shows 'SETUP > OBJECT MANAGER' and the object name 'Appointment'. The main table has columns: 'FIELD LABEL', 'FIELD NAME', 'DATA TYPE', 'CONTROLLING FIELD', and 'INDEXED'. Two fields are listed: 'Appointment Date' (Field Label: Appointment Date, Field Name: Appointment_Date__c, Data Type: Date) and 'Appointment Name' (Field Label: Appointment Name, Field Name: Name, Data Type: Auto Number). A red box highlights the 'New' button in the top right corner of the table header.

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

The screenshot shows the 'Data Type' configuration step. It asks to specify the type of information the custom field will contain. Below is a list of data types:

- None Selected: Select one of the data types below.
- Auto Number: A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Formula: A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
- Roll-Up Summary: A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
- Lookup Relationship: Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
 - Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
- Master-Detail Relationship: Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.

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.

Lookup Options

Related To: Appointment

Related List Label: Service records

Child Relationship Name: Service_records

Required: Always require a value in this field. You can't choose this option if you make this field required.

What to do if the lookup record is deleted? Clear the value of this field. You can't choose this option if you make this field required. Don't allow deletion of the lookup record that's part of a lookup relationship.

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.

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

Field	Operator	Value / Field
Appointment: Appointment Date	less than	Field: Appointment: Created Date

Add: Begin typing to search for a field... Value

Clear Filter Criteria

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

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 :

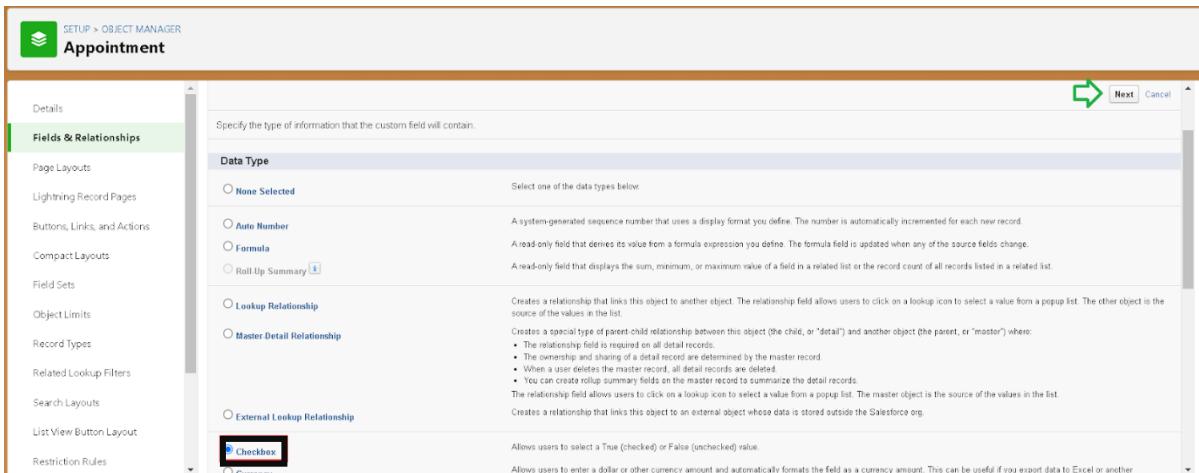
1. Go to setup >> click on Object Manager >> type object name(Billing details and feedback) in search bar >> click on the object.

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.

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

Appointment
New Custom Field

Help for this Page ?

Step 2. Enter the details Step 2 of 4

Field Label Maintenance service

Default Value Checked Unchecked 

Field Name Maintenance_service

Description

Help Text

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

Previous Next Cancel



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

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. Enter the details Step 2 of 4

Field Label: [i](#)

Field Name: [i](#)

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 [i](#)

Default Value: [i](#)

Previous [Next](#) Cancel

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 Nme : is auto populated

This screenshot shows the 'Step 2. Enter the details' screen for creating a new field. The field label is set to 'Service Amount'. The length is set to 18, and the decimal places are set to 0. The field name is 'Service_Amount'. There are input fields for Description and Help Text, both of which are currently empty. Below these fields are two checkboxes: 'Required' (unchecked) and 'Auto add to custom report type' (checked). At the bottom right of the screen, there are 'Previous', 'Next', and 'Cancel' buttons. The top right corner indicates 'Step 2 of 4'.

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

This screenshot shows the 'Step 3. Establish field-level security' screen. It displays the field details: Field Label 'Service Amounts', Data Type 'Currency', Field Name 'Service_Amounts', and Description empty. Below this, a table titled 'Field-Level Security for Profile' lists various profiles and their visibility and read-only status. A green arrow points to the 'Next' button at the top right of the screen. The top right corner indicates 'Step 3 of 4'.

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"/>

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 Nme : is auto populated

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.

Step 2. Enter the details Step 2 of 4

Field Label: Vehicle number plate

Length: 10

Field Name: Vehicle_number_plate

Description:

Help Text:

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

Unique: Do not allow duplicate values

External ID: Treat "ABC" and "abc" as duplicate values (case insensitive) Treat "ABC" and "abc" as different values (case sensitive)

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

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

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.
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: 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:

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.

Creating 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

Step 2 of 5

Field Label: service date

Field Name: service_date

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

Formula Return Type

None Selected

Checkbox

Currency

Date

Date/Time

Select one of the data types below

Calculate a boolean value
Example: TODAY() > CloseDate

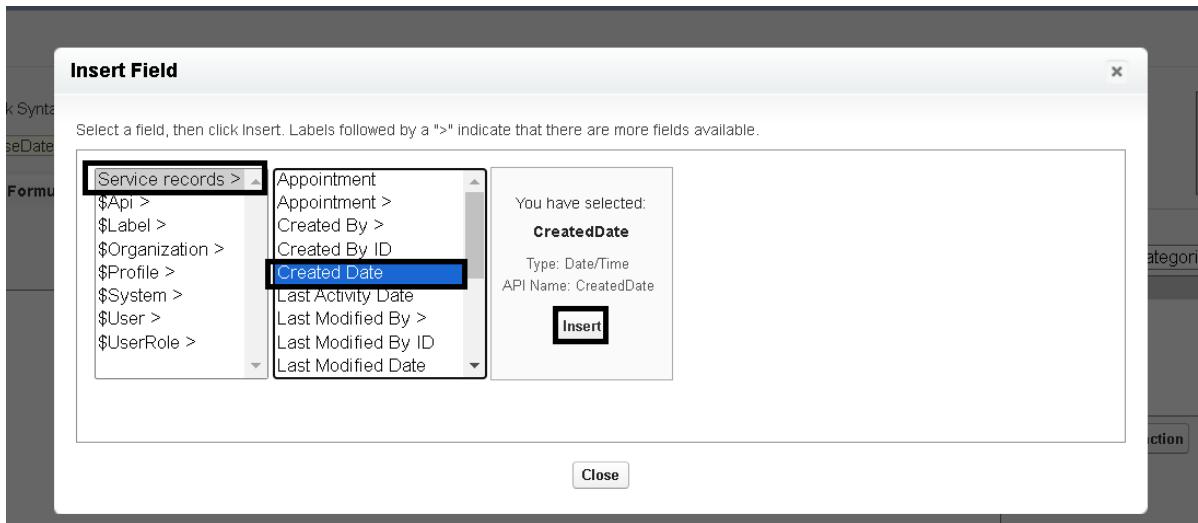
Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: Gross Margin = Amount - Cost_c

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

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

Previous Next Cancel

5. Insert field formula should be : CreatedDate



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

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.

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

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

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

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 valid number”, 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

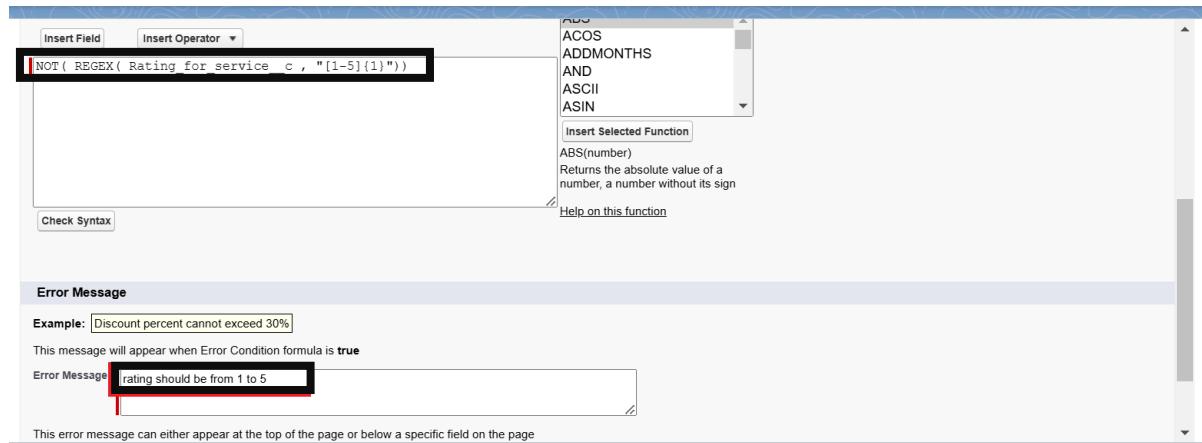
To create a validation rule to an Billing details and feedback Object

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}"))

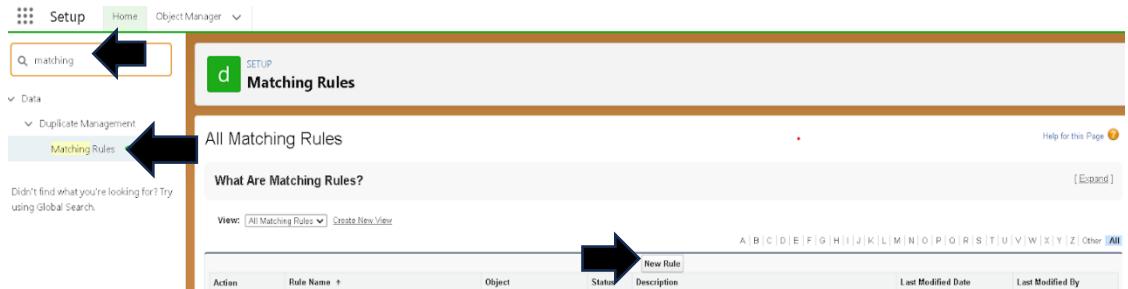


5. Enter the Error Message as “rating should be from 1 to 5”, select the Error location as Field and select the field as “Rating for Service”, and click Save.

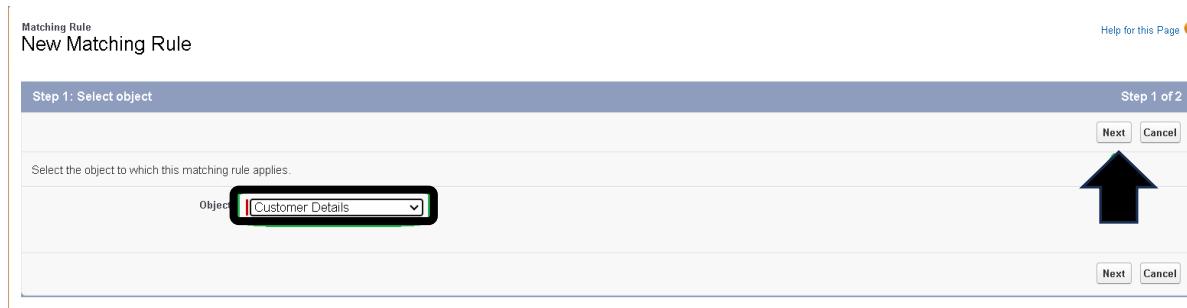


To create a matching rule to an Customer details Object

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

2. Phone Number

8. Click save.

9. After Saving Click on Activate.

The screenshot shows the Salesforce Setup interface. In the top navigation bar, 'Setup' is selected. The left sidebar has 'Data' expanded, with 'Duplicate Management' and 'Matching Rules' selected. A search bar at the top left contains the text 'matching'. The main content area is titled 'Matching Rules' under 'SETUP'. It shows 'Rule Details' for a rule named 'Matching customer details' with unique name 'Matching_customer_details'. The 'Matching Criteria' section lists fields 'Gmail', 'Phone number', and '--None--' with matching methods 'Exact', 'Exact', and 'Exact' respectively, and an 'AND' operator for all criteria.

The screenshot shows the Salesforce Setup interface after saving the rule. The left sidebar and search bar are identical to the previous screen. The main content area shows the 'Matching Rule' for 'Matching customer details'. The 'Matching Rule Detail' table includes columns for Object (Customer Details), Rule Name (Matching customer details), Unique Name (Matching_customer_details), Description (Customer Details: Gmail EXACT MatchBlank = FALSE) AND (Customer Details: Phone_number EXACT MatchBlank = FALSE), Status (Active), Created By (Roshini.S. 9/13/2025, 1:44 AM), and Modified By (Roshini.S. 9/13/2025, 1:44 AM). A 'Help for this Page' link is visible in the top right corner.

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.

The screenshot shows the Salesforce Setup interface with the search bar containing "duplicate". The "Data" section is expanded, and "Duplicate Rules" is selected under "Duplicate Management". The main content area displays the "All Duplicate Rules" page with the title "What Are Duplicate Rules?". A table lists four rules:

Rule Name	Description	Object	Matching Rule	Active	Last Modified By	Last Modified Date
Customer Detail duplicate		Customer Details	Matching customer details	<input checked="" type="checkbox"/>	ros	9/13/2025
Standard Account Duplicate Rule	Identify accounts that duplicate other accounts.	Account	Standard Account Matching Rule	<input checked="" type="checkbox"/>	QEPIC	9/9/2025
Standard Contact Duplicate Rule	Identify contacts that duplicate other contacts and leads.	Contact	Standard Contact Matching Rule Standard Lead Matching Rule	<input checked="" type="checkbox"/>	QEPIC	9/9/2025
			Standard Contact Matching	<input type="checkbox"/>	QEPIC	9/9/2025

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.

The screenshot shows the "Edit Duplicate Rule" page for "Customer Detail duplicate". The "Rule Details" section includes fields for "Rule Name" (Customer Detail duplicate), "Description" (Customer Details), "Object" (Customer Details), and "Record-Level Security" (Enforce sharing rules selected). A black arrow points to the "Rule Name" field. The "Actions" section specifies actions on create and edit, and an alert text field.

Matching Rules

Define how duplicate records are identified.

Compare Customer Details With: Customer Details
Matching Rule: matching Customer details

Matching Criteria: (Customer Details: Gmail 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--		
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		

Add Filter Logic

Save Save & New Cancel

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.

Setup Home Object Manager

profiles

Users Profiles

Didn't find what you're looking for?
Try using Global Search.

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile: Standard User
User License: Salesforce
Profile Name: Manager

Save Cancel

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

The screenshot shows the Salesforce Setup Profiles page. At the top, there's a blue header bar with a user icon and the word "SETUP". Below it, the title "Profiles" is displayed. On the left, a sidebar lists "Profile Manager". The main content area shows the "Manager" profile details. It includes fields for Name (Manager), User License (Salesforce), Description, Created By (Roshini S.), and Modified By (Roshini S.). There are buttons for "Edit", "Clone", "Delete", and "View Users". Below this, the "Page Layouts" section is shown, with tabs for "Standard Object Layouts" and "Location Group Layouts".

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

The screenshot shows the "Custom App settings" page. It displays a list of applications and their status. The "Garage Management Application" is selected as the default setting. Other applications listed include Data Manager, Digital Experiences, Laptop Hub, Service Console, Site.com, and Subscription Management.

- Scroll down to Custom Object Permissions and Give access permissions for Appointments,Billing details and feedback , service records and customer details objects as mentioned in the below diagram.

The screenshot shows the "Custom Object Permissions" page. It lists several objects: Appointments, Billing details and feedback, Customer Details, Environments, Laptops, Service records, and SessionData. For each object, there are checkboxes for Basic Access (Read, Create, Edit, Delete) and Data Administration (View All, Modify All). The "Customer Details" object has all checkboxes checked under both categories.

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

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"/>

5. And click save.

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 interface. In the top left, there's a search bar with 'roles' typed in. Below it, under 'Users', there's a 'Roles' link which is also highlighted with a red box. On the left sidebar, there are several sections like 'Feature Settings' and 'Sales'. Under 'Sales', there are links for 'Contact Roles on Contracts' and 'Contact Roles on Opportunities'. Under 'Service', there are 'Case Teams' and 'Case Team Roles'. At the bottom left, there's a note: 'Didn't find what you're looking for? Try using Global Search.' On the right, the main content area is titled 'Understanding Roles' with a sub-section 'Sample Role Hierarchy'. It shows a hierarchy from 'Executive Staff' down to 'Western Sales Reps' and 'Eastern Sales Reps'. Arrows indicate the reporting relationships between these roles. A 'Territory-based Sample' dropdown is visible. At the bottom right, there's a 'Set Up Roles' button and a 'Don't show this page again' checkbox.

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

Creating the Role Hierarchy

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

Your Organization's Role Hierarchy

Kumaraguru College of Liberal Arts and Science

- CEO** Edit | Del | Assign
- CFO** Edit | Del | Assign
- COO** Edit | Del | Assign
- Manager** Edit | Del | Assign
- sales person** Edit | Del | Assign

Add Role

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

Role Edit

Label	Manger
Role Name	Manger
This role reports to	CEO
Role Name as displayed on reports	Manger

Save **Save & New** **Cancel**

Creating another roles

Creating another two roles under manager

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

The screenshot shows the Salesforce Setup Roles page. At the top, there is a blue header bar with a user icon and the text "SETUP Roles". Below the header, a banner reads "Your Organization's Role Hierarchy". Underneath the banner, there are two links: "Collapse All" and "Expand All".

The main content area displays a hierarchical tree of roles:

- Kumaraguru College of Liberal Arts and Science**
 - CEO** (highlighted with a red circle) [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - CFO** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - COO** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - Manager** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#) (highlighted with a black rectangle)
 - sales person** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - SVP, Customer Service & Support** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - Customer Support, International** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)
 - Customer Support, North America** [Edit](#) | [Del](#) | [Assign](#)
 - [Add Role](#)

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

Create User

- Go to setup >> type users in quick find box >> select users >> click New user.
- Fill in the fields
 - First Name : Niklaus
 - Last Name : Mikaelson
 - Alias : Give a Alias Name
 - Email id : Give your Personal Email id
 - Username : Username should be in this form: text@text.text
 - Nick Name : Give a Nickname

7. Role : Manager
8. User licence : Salesforce
9. Profiles : Manager

The screenshot shows the Salesforce Setup interface under the 'Users' section. On the left, there's a navigation sidebar with links like 'Permission Set Groups', 'Profiles', 'Public Groups', 'Queues', 'Roles', 'User Management Settings', 'Feature Settings', 'Data.com', and 'Prospector Users'. The main area is titled 'User Edit' for 'Niklaus Mikaelson'. The 'General Information' section contains fields for First Name (Niklaus), Last Name (Mikaelson), Alias (nmiika), Email (roshinisanthakumar@gmail.com), Username (roshinisanthakumar@gmail.com), and Nickname (rose). To the right, there are sections for 'Role' (Manager), 'User License' (Salesforce), 'Profile' (Manager), and 'Active' status (checked). Other optional checkboxes include 'Marketing User', 'Offline User', 'Knowledge User', and 'Flow User'.

3. Save.

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.

Creating New Public Group

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

The screenshot shows the Salesforce Setup interface under the 'Public Groups' section. On the left, there's a navigation sidebar with links like 'Users' and 'Public Groups'. The main area is titled 'Public Groups' and contains a table with columns for 'Label', 'Group Name', 'Created By', and 'Created Date'. A note at the bottom of the table area says 'No records to display.'

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.

The screenshot shows the Salesforce Setup interface. On the left, the navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar at the top left contains the text 'public'. The main content area is titled 'Public Groups' under the 'SETUP' tab. It displays a 'Group Membership' section for a group named 'sales team'. The 'Edit Public Group' form shows the 'Label' field set to 'sales team' and the 'Group Name' field set to 'sales_team'. A checked checkbox indicates 'Grant Access Using Hierarchies'. Below the form are two sections: 'Available Members' (containing '--None--') and 'Selected Members' (containing 'Role: sales person'). A sidebar on the left lists categories like 'Users', 'Feature Settings', and 'Company Settings', with 'Public Groups' highlighted. A message at the bottom left encourages users to try global search.

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.

User Provisioning Request	Private	Private	<input checked="" type="checkbox"/>
Waitlist	Private	Private	<input checked="" type="checkbox"/>
Web Cart Document	Private	Private	<input checked="" type="checkbox"/>
Work Order	Private	Private	<input checked="" type="checkbox"/>
Work Plan	Private	Private	<input checked="" type="checkbox"/>
Work Plan Template	Private	Private	<input checked="" type="checkbox"/>
Work Step Template	Private	Private	<input checked="" type="checkbox"/>
Work Type	Private	Private	<input checked="" type="checkbox"/>
Work Type Group	Public Read/Write	Private	<input checked="" type="checkbox"/>
Appointment	Public Read/Write	Private	<input checked="" type="checkbox"/>
Billing details and feedback	Public Read/Write	Private	<input checked="" type="checkbox"/>
Customer Details	Public Read/Write	Private	<input checked="" type="checkbox"/>
Service records	Private	Private	<input checked="" type="checkbox"/>

Other Settings Other Settings Help (?)

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

Service Resource Sharing Rules		<input type="button" value="New"/> <input type="button" value="Recalculate"/>	Service Resource Sharing Rules Help (?)
No sharing rules specified.			

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.

The screenshot shows the 'Sharing Settings' configuration page in Salesforce Setup. It consists of five steps:

- Step 1: Rule Name**: Fields include Label ('sharing settings'), Rule Name ('sharing_settings'), and Description. A large black arrow points to the Rule Name field.
- Step 2: Select your rule type**: Options are 'Based on record owner' (selected) and 'Based on criteria'.
- Step 3: Select which records to be shared**: Service records: owned by members of 'Roles' (selected), with 'Sales person' as the value.
- Step 4: Select the users to share with**: Share with 'Roles' (selected), with 'Manager' as the value.
- Step 5: Select the level of access for the users**: Access Level is set to 'Read/Write'. At the bottom are 'Save' and 'Cancel' buttons.

Create a Flow

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

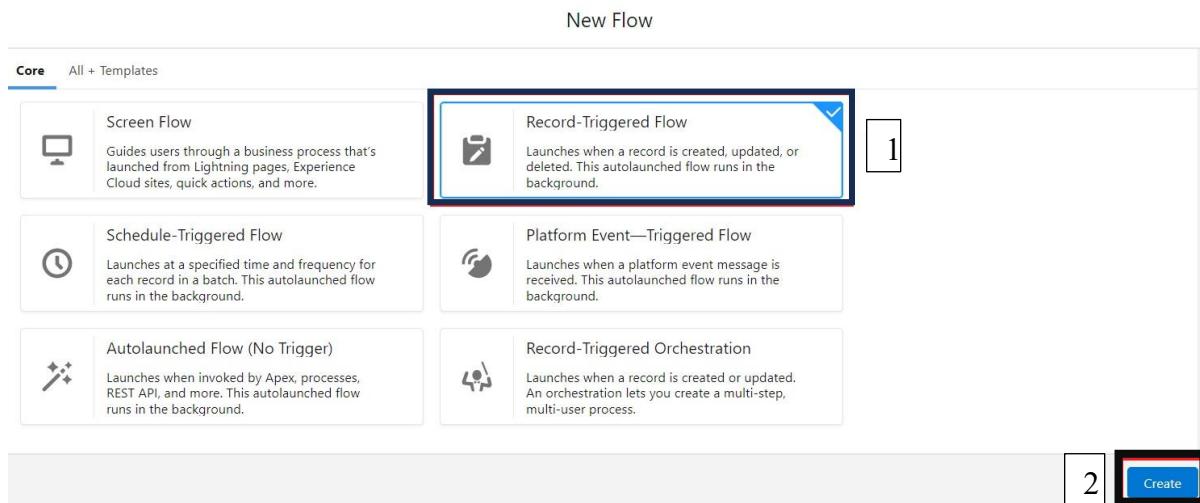
The screenshot shows the Salesforce Setup interface with the following navigation path:

1. In the top-left corner, under 'Setup', click on 'flows'.
2. In the left sidebar, under 'Process Automation', click on 'Flows'.
3. On the main screen, click on the 'New Flow' button.

The main screen displays the 'Flows' list with the following details:

Flow Label	Process Type	A...	Te...	Package State	Pa...	Las...	Last Modifie...
Add or Modify Service Appointment...	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Approvals Workflow: Evaluate Apr...	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Approvals Workflow: Process Apr...	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Authentication Provider User Regis...	Identity User Registration Fl...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Basic Approval Request	Flow Orchestration for CMS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Billing Amount Flow	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged	Roshini S	9/13/2025, 3:14 A...	
Book Appointment from Invitation	Salesforce Scheduler Flow	<input type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			

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

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.

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
None

***Optimize the Flow for:**

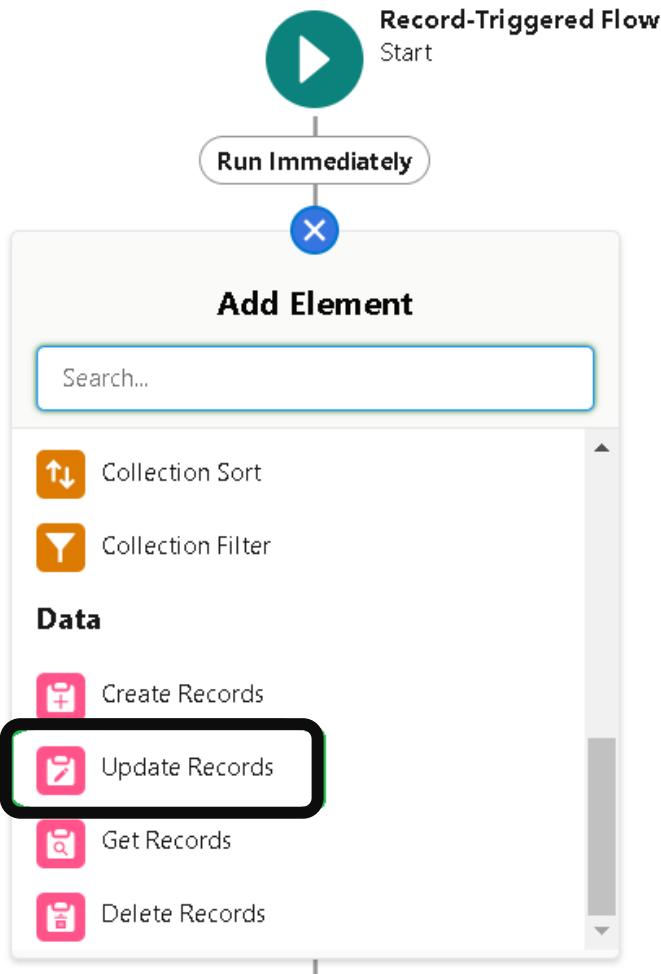
Fast Field Updates
Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

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

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 <ul style="list-style-type: none"> <input checked="" type="radio"/> Use the billing details and feedback record that triggered the flow <input type="radio"/> Update records related to the billing details and feedback record that triggered the flow <input type="radio"/> Use the IDs and all field values from a record or record collection <input type="radio"/> Specify conditions to identify records, and set fields individually 	
Set Filter Conditions	
Condition Requirements to Update Record	
<input type="button" value="All Conditions Are Met (AND)"/>	
<input type="button" value="Cancel"/> <input type="button" value="Done"/>	

Set Filter Conditions

Condition Requirements to Update Record

All Conditions Are Met (AND)

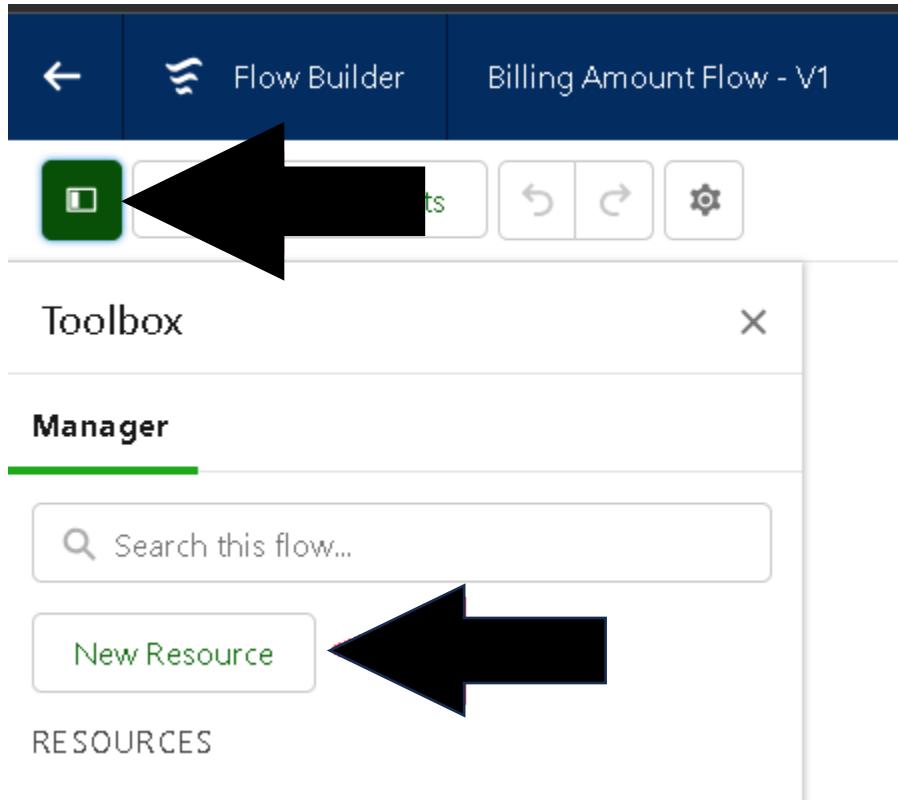
Field	Operator	Value
Payment_Status__c	Equals	Completed

Set Field Values for the Billing details and feedback Record

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

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.

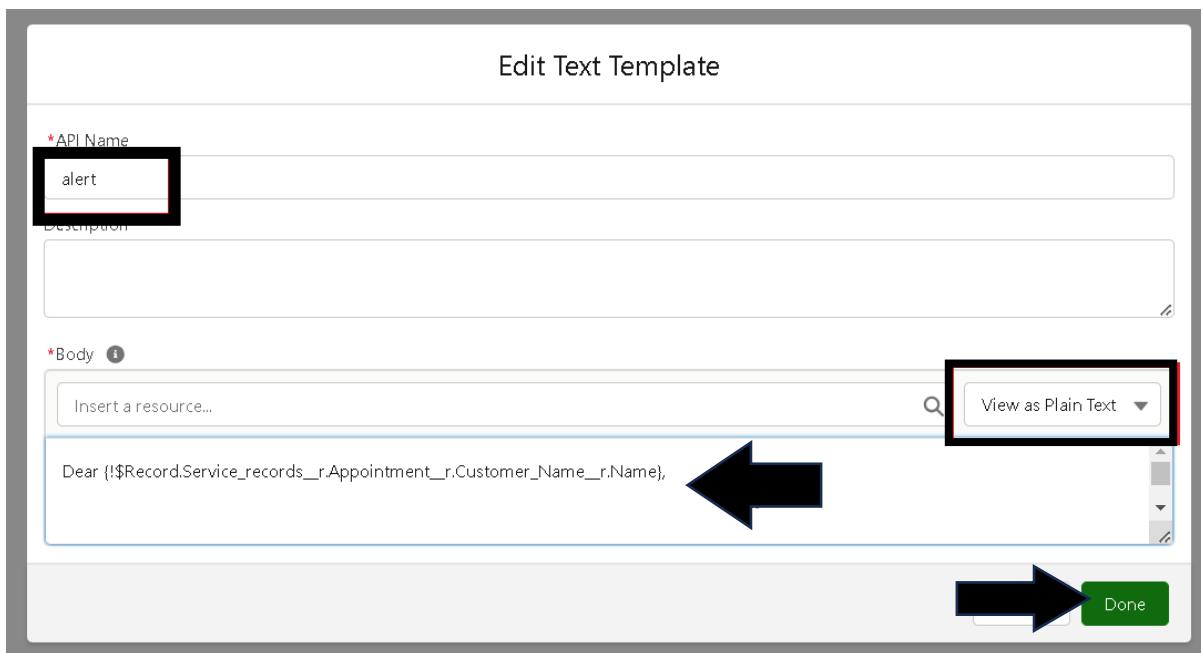
Dear {!\$Record.Service_records__r.Appointment__r.Customer_Name__r.Name},

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
Email Alert	Email_Alert
Description	
<input type="text"/>	

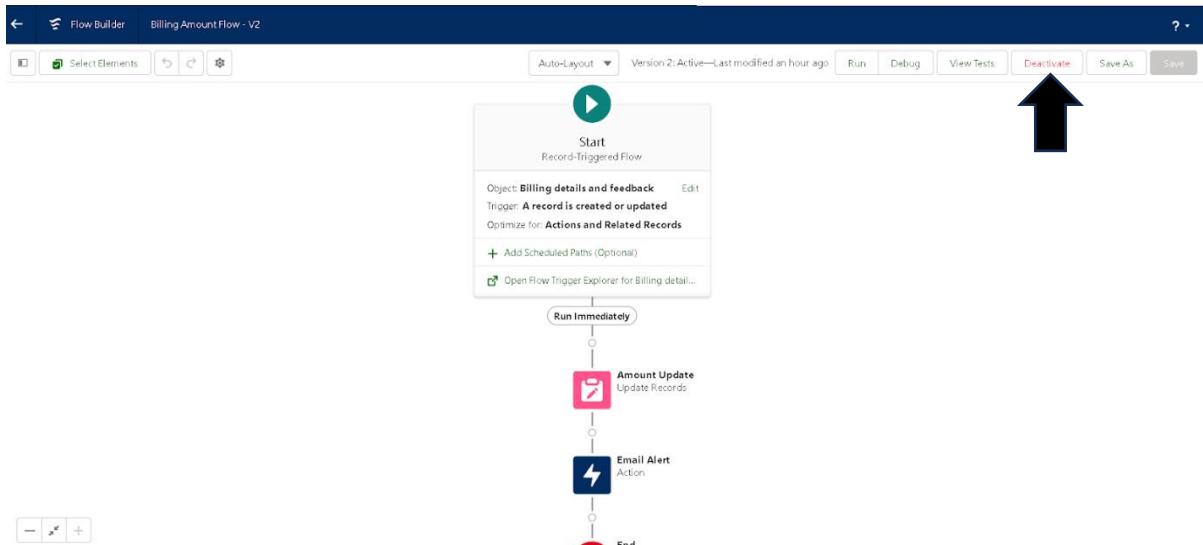
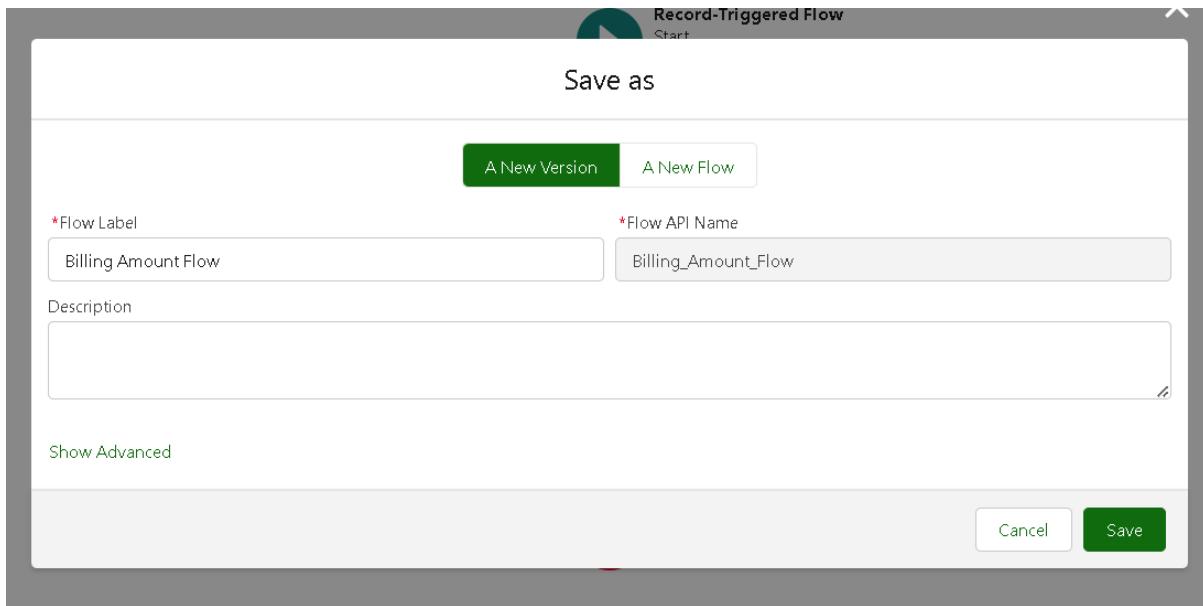
Set Input Values for the Selected Action

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

Edit Action

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

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



Create another Flow

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

Flows

1

Process Automation

2

Identity

Login Flows

Didn't find what you're looking for?
Try using Global Search.

SETUP Flows

All Flows

Flow Definitions

Flow Label ↑ Process Type A... Te... Package State Pa... Las... Last Modifie...

Add or Modify Service Appointmen...	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed
Approvals Workflow: Evaluate Appr...	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed
Approvals Workflow: Process Appr...	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed
Authentication Provider User Regis...	Identity User Registration Fl...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed
Basic Approval Request	Flow Orchestration for CMS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed
Billing Amount Flow	Autolaunched Flow	<input type="checkbox"/>	<input type="checkbox"/>	Unmanaged

Rochini S 9/12/2025 2:14 AM

- 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

- 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

12. Field : **Service_Status__c**

13. Value : **Completed**

Set Filter Conditions

Condition Requirements to Update Record

All Conditions Are Met (AND) ▾

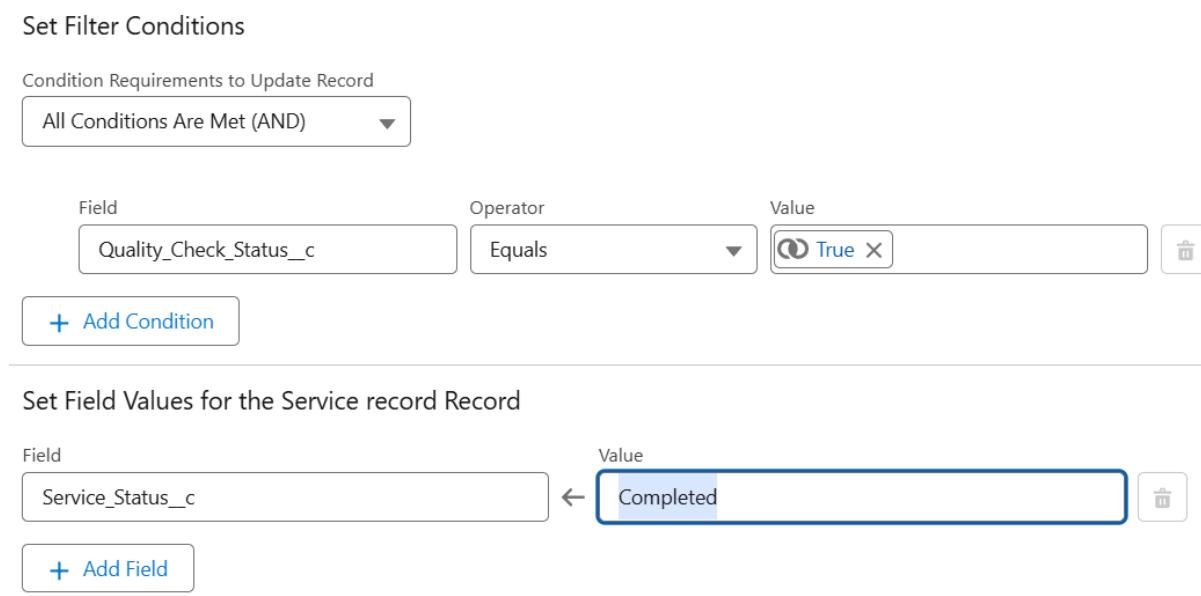
Field	Operator	Value
Quality_Check_Status__c	Equals	True X

+ 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**.

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”.

AmountDistribution.apxt AmountDistributionHandler.apxc

```

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    public void amountDist(list<Appointment__c> listApp){
26        list<Service_records__c> serList = new list <Service_records__c>();
27
28        for(Appointment__c app : listApp){
29            if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){
30                app.Service_Amount__c = 8000;
31            }
32            else if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){
33                app.Service_Amount__c = 7000;
34            }
35            else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
36                app.Service_Amount__c = 3000;
37            }
38            else if(app.Replacement_Parts__c == true){
39                app.Service_Amount__c = 5000;
40            }
41        }
42    }
43
44 }

```

Code:

```

public class AmountDistributionHandler {

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

```

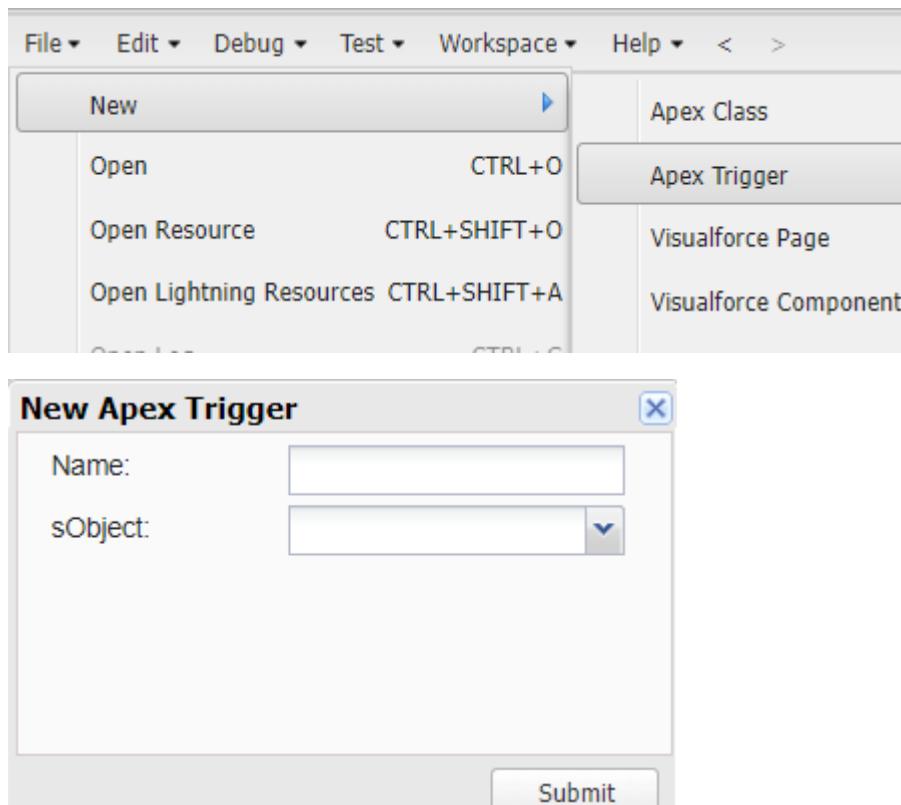
```
for(Appointment__c app : listApp){  
    if(app.Maintenance_service__c == true && app.Repairs__c == true &&  
        app.Replacement_Parts__c == true){  
        app.Service_Amount__c = 10000;  
    }  
    else if(app.Maintenance_service__c == true && app.Repairs__c == true){  
        app.Service_Amount__c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

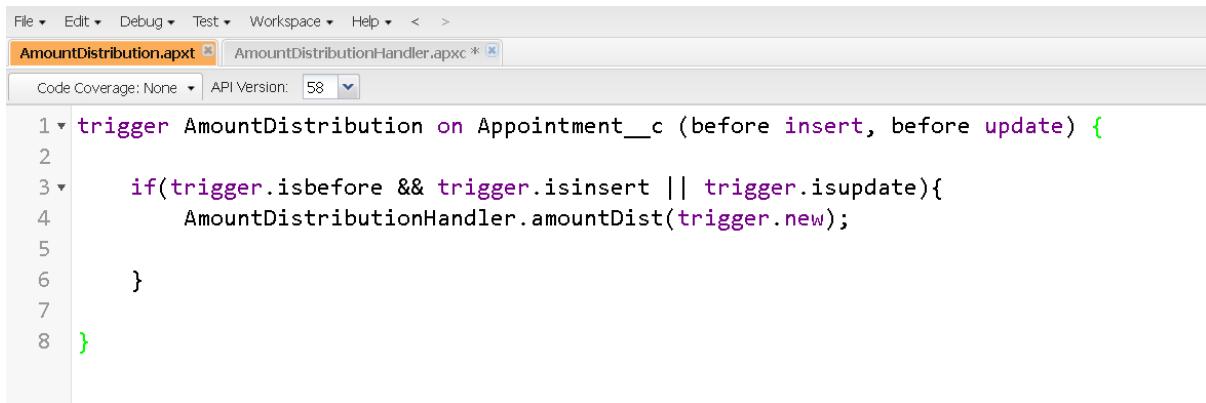
Trigger [trigger name] on [object name](Before/After event)

{

}

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



```
File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >
AmountDistribution.apxt AmountDistributionHandler.apxc * 
Code Coverage: None ▾ API Version: 58 ▾
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);

    }
}
```

}

create a report folder

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

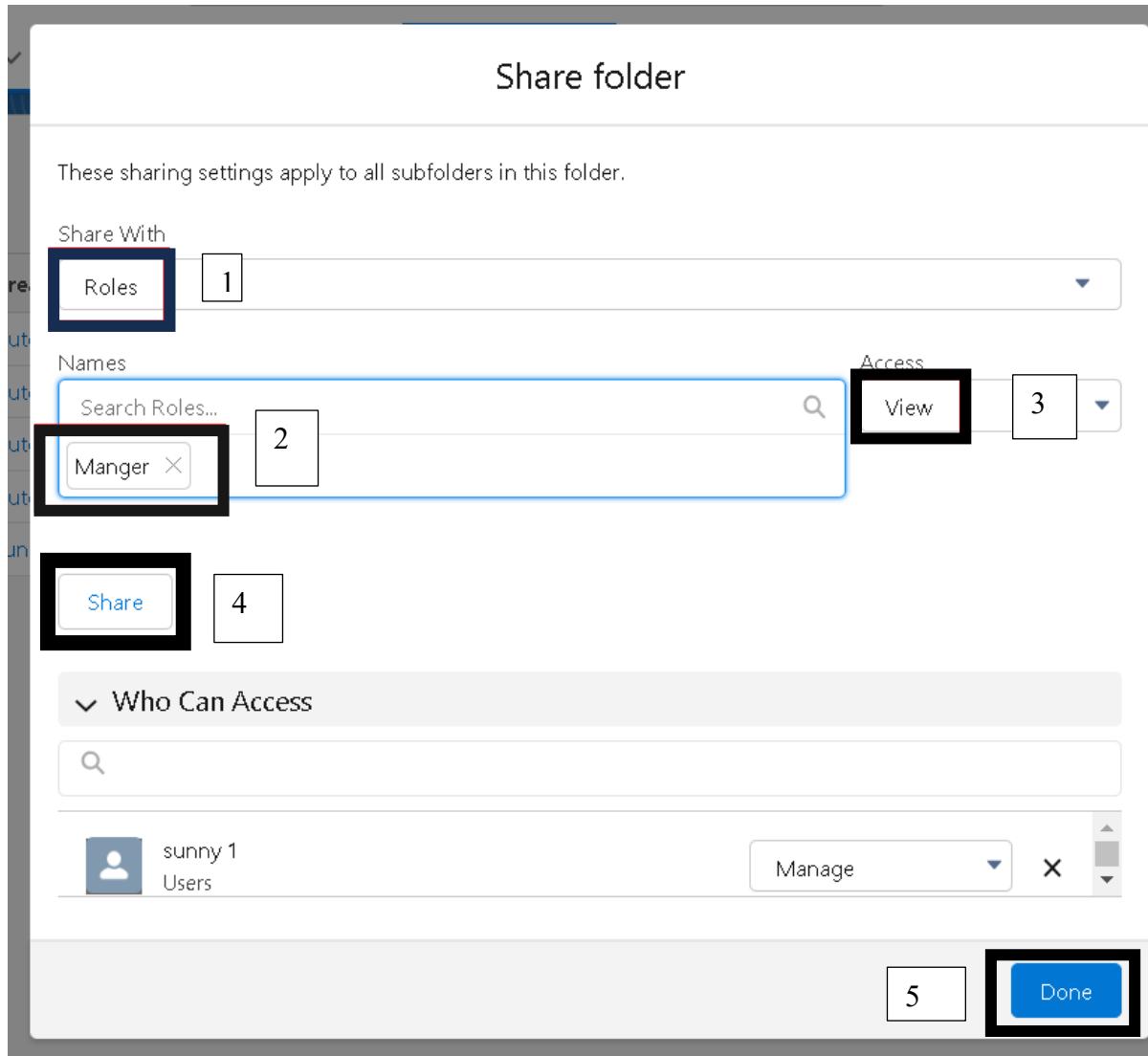
The screenshot shows the Garage Management application interface. On the left, there is an 'App Launcher' sidebar with a search bar containing 'rep'. It lists categories: Apps (No results), Items, Reports, and FOLDERS. Under Reports, it shows 'Public Reports' and 'All Reports'. On the right, the main area is titled 'Reports' with a search bar 'Search recent reports...' and a 'New Report' button. A table displays a single row of data: Description (Garage Management Folder), Folder (Roshini S), Created On (9/13/2025, 5:37 AM).

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

The screenshot shows a 'Create folder' dialog box. It has two input fields: 'Folder Label' containing 'Garage Management Folder' and 'Folder Unique Name' containing 'GarageManagementFolder'. At the bottom, there are 'Cancel' and 'Save' buttons.

Sharing a report folder

1. Go to the app >> click on the reports tab.
2. Click on the All folder , click on the Drop down arrow for Garage Management folder, and Click on share.
3. Select the share with as “roles”, in name field search for “manager”, give “view” as access for that role.
4. Then click share, and click on Done.



Create Report Type

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

Search Setup

Setup Home Object Manager

report types

Feature Settings

- Analytics
- Reports & Dashboards
- Report Types**

All Custom Report Types

Custom Report Type

Label ↑	Name	Description	Category	Created Date
Orchestration Run Logs Spring...	flow_orchestration_log_oottb_crt...	Find out which orchestration run...	Other Repor...	autproc 9/9/2025, 2:04 PM
Orchestration Runs Spring '24	flow_orchestration_run_oottb_crt...	Find out which orchestration run...	Other Repor...	autproc 9/9/2025, 2:04 PM
Orchestration Stage Runs Spi...	flow_orchestration_stage_run_o...	Find out which orchestration sta...	Other Repor...	autproc 9/9/2025, 2:04 PM
Orchestration Step Runs Spring...	flow_orchestration_step_run_oot...	Find out which orchestration ste...	Other Repor...	autproc 9/9/2025, 2:04 PM
Orchestration Work Items Spri...	flow_orchestration_work_item_o...	Find out which orchestration wo...	Other Repor...	autproc 9/9/2025, 2:04 PM
Program Definition Spring '24	Program_Definition_sfcdSESV60	Review your analytics with a pro...	Other Repor...	autproc 9/9/2025, 2:04 PM
Program Definition Summer '24	Program_Definition_sfcdSESV61	Review your analytics with a pro...	Other Repor...	autproc 9/9/2025, 2:04 PM

3. Select the Primary object as “ Customer details” .
4. Give the Report type Label as “ Service information ”
5. Report type Name is autpopulated.
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

Primary Object: Customer Details

Identification

Report Type Label: Service information

Report Type Name: Service_information

Description: Service information

Store in Category: Other Reports

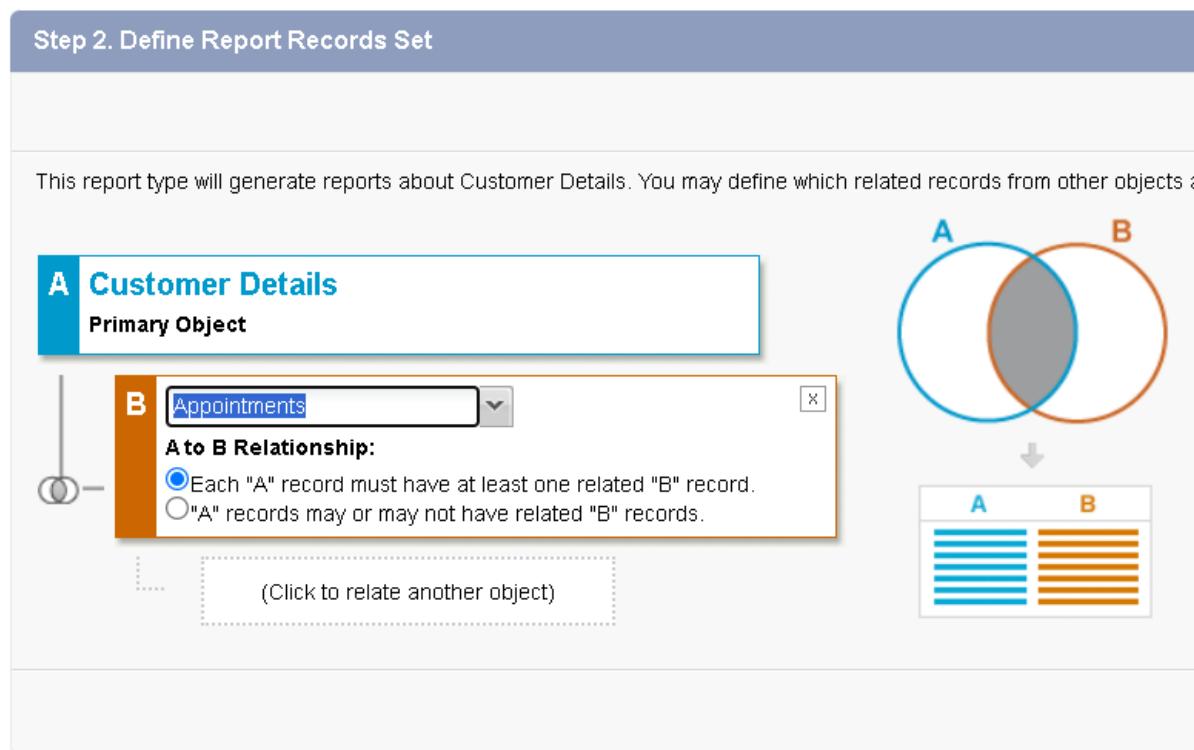
Deployment

Deployment Status: Deployed

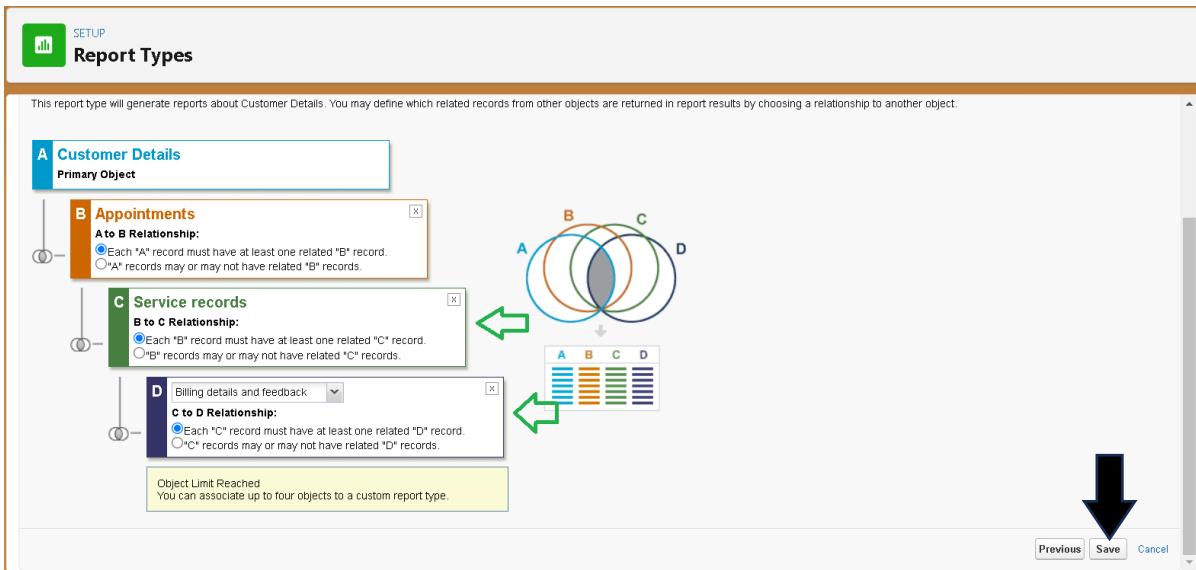
Next Cancel

9. now , Click on Related object box.

- Click on Select Object, choose Appointment Object as shown in fig.



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



Create Report

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

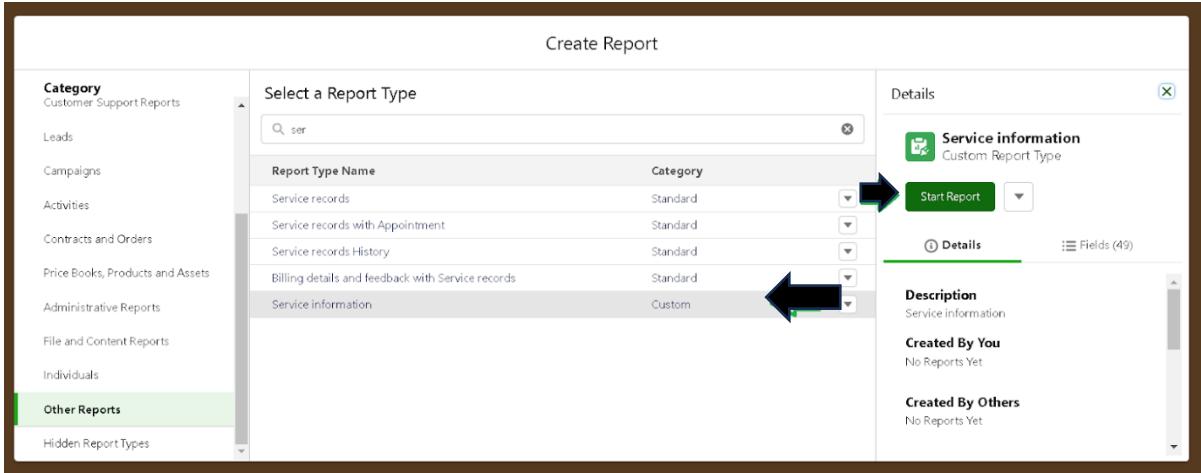
Try to fill every field in each record for better experience.

1. Go to the app >> click on the reports tab

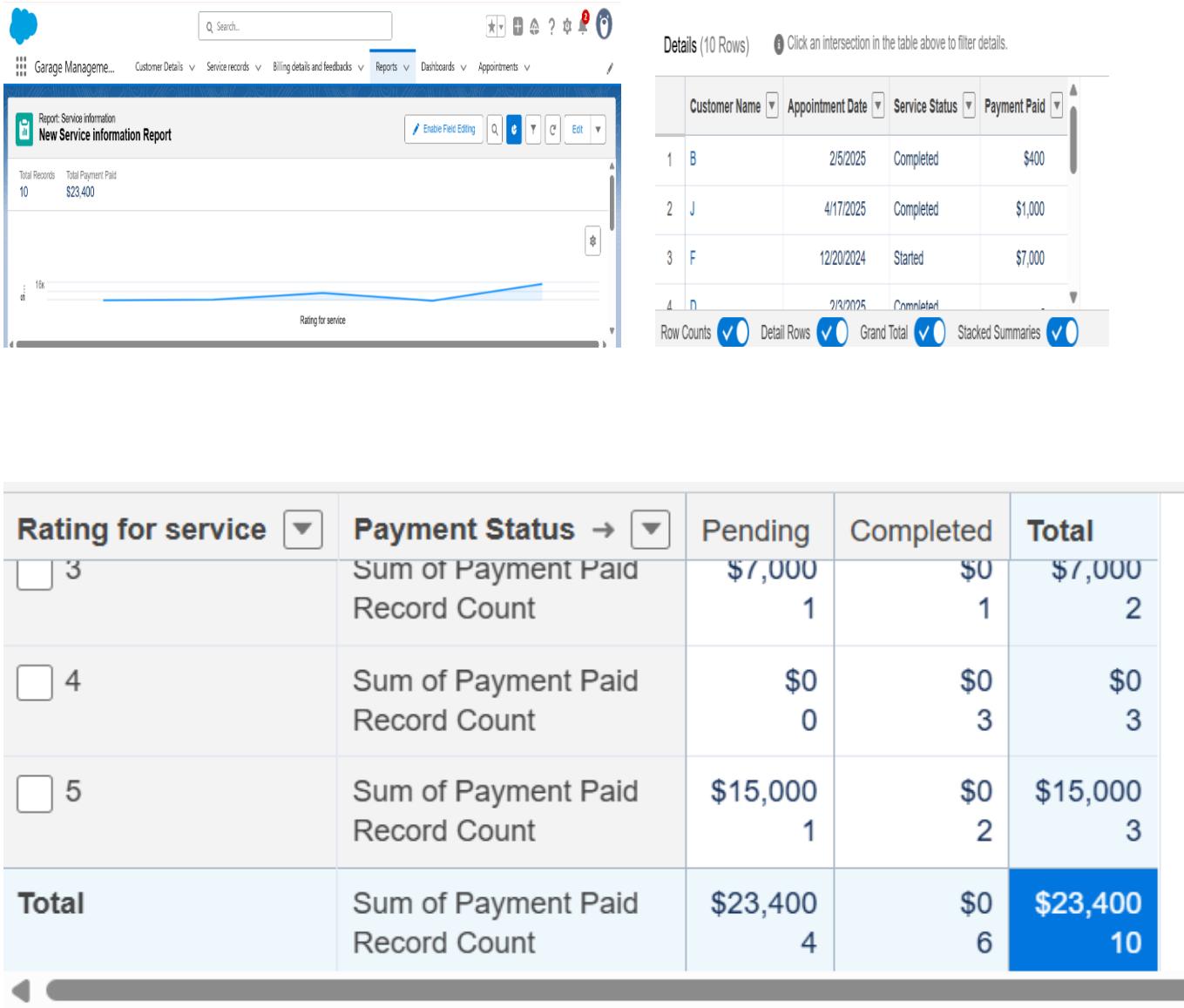
2. Click New Report.

Report Name	Description	Folder	Created By	Created On	Subscribed
New Service information Report		Garage Management Folder	Roshini S	9/13/2025, 5:37 AM	

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



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.



- Report Name: *New Service Information Report*
- Total Records: **10**
- Total Payment Paid: **\$23,400**
- The line chart plots **Rating for Service vs. Payment Trend**.

This report tracks **how much money is pending vs. completed payments**, broken down by **customer service ratings**. It helps see if higher ratings link with payment completion, and gives managers visibility into pending dues.

Save Report

*Report Name
New Service information Report

Report Unique Name ⓘ
New_Service_information_Report_oVu

Report Description

Folder
Garage Management Folder

Select Folder

Cancel Save



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

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

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.

Garage Management System

Customer Details

Service records

Billing details and feedbacks

Reports

Dashboards

Appointments

+ Widget X

+ Filter

Cancel Create

New Dashboard

* Name

Customer Review

Description

Folder

Service Rating Select Folder

3. Select a Report and click on select.

The screenshot shows the 'Reports' section of the Garage Management system. The 'Recent' tab is selected, displaying one item: 'New Service information Report'. The report details are as follows:

Report Name	Description	Folder	Created By	Created On	Subscribers
New Service information Report		Garage Management Folder	Roshini S	9/13/2025, 5:37 AM	

On the left sidebar, under 'REPORTS', the 'Recent' tab is also selected. Other options include 'Created by Me', 'Private Reports', 'Public Reports', and 'All Reports'. Under 'FOLDERS', there is a single entry: 'Garage Management Folder'.

4. Select the Line Chart. Change the theme.

5. Click Add then click on Save and then click on Done.

6. Preview is shown below.

The screenshot shows the 'Customer Review' dashboard. The title is 'Customer Review' and it indicates 'As of Sep 13, 2025, 5:51 AM' and 'Viewing as Roshini S'. The main content is a line chart titled 'New Service information Report'.

Line Chart Data:

Rating for service	Sum of Payment Due (\$)
1	\$0
2	\$1k
3	\$7k
4	\$7k
5	\$15k

Legend:

- Pending (Blue arrow)
- Completed (Green arrow)

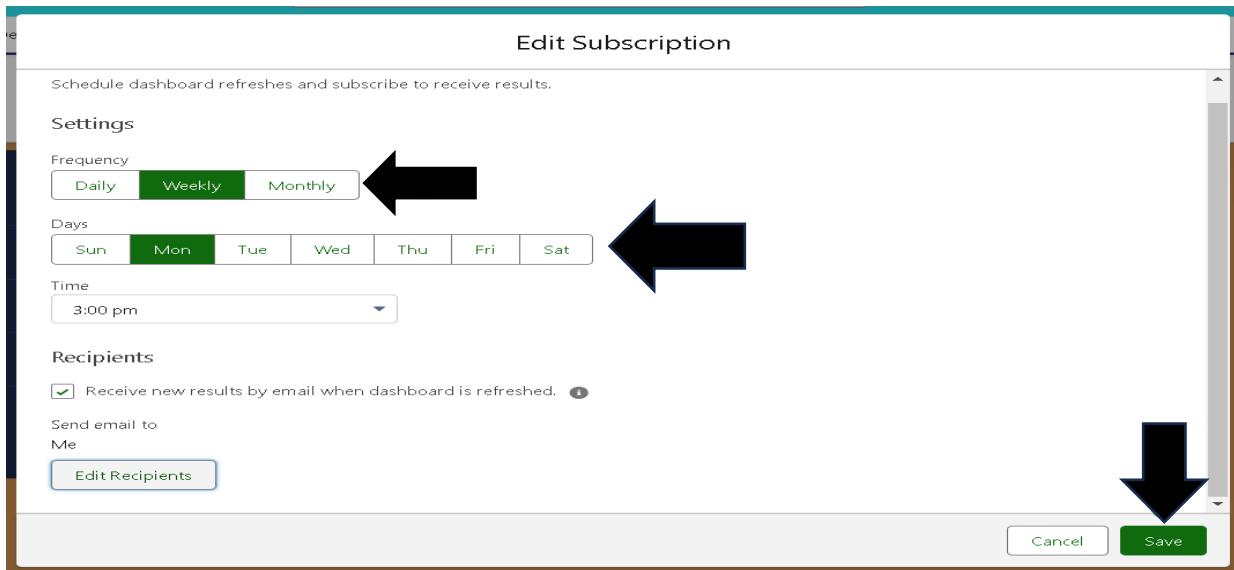
At the bottom of the chart, it says 'View Report (New Service information Re...)' and 'As of Sep 13, 2025, 5:51 AM'.

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.



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.

The screenshot shows the 'New Customer Details' form. At the top, it says 'New Customer Details'. Below that is a section titled 'Information'. It contains four input fields: 'Customer Name' (containing 'Z'), 'Phone number' (containing '234545'), 'Gmail' (containing 'z@gmail.com'), and 'Phone' (empty). To the right of these fields is an 'Owner' section with a user icon and the name 'Roshini S'. At the bottom of the form are three buttons: 'Cancel', 'Save & New' (highlighted in blue), and '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.

The screenshot shows a web-based application interface for managing appointments. At the top, there is a header with a logo, a search bar containing "Search...", and several navigation links: "Customer Details", "Service records", "Billing details and feedbacks", "Reports", "Dashboards", and "Appointments". The "Appointments" link is highlighted. Below the header, a sub-header displays "Appointments" and "Recently Viewed". A dropdown arrow next to "Recently Viewed" indicates a list of items. To the right of this are buttons for "New", "Import", and "Change Owner". A message "11 items • Updated a few seconds ago" is displayed. The main content area is a table listing 11 appointment entries, each with a checkbox and a link. The entries are numbered 1 through 11, followed by a checkbox and a link labeled "app-001" through "app-001".

	Appointment Name
1	app-011
2	app-010
3	app-009
4	app-008
5	app-007
6	app-006
7	app-005
8	app-004
9	app-003
10	app-002
11	app-001

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.

The screenshot shows the Garage Management System interface. At the top, there is a navigation bar with icons for cloud, garage, and user profile, followed by the text "Garage Manageme...". To the right of the navigation bar are links for "Customer Details", "Service records", "Billing details and feedbacks", "Reports", and "Dash". Below the navigation bar is a search bar with the placeholder "Search..." and a magnifying glass icon. The main content area is titled "Service records" with a pink coffee cup icon. Below the title, it says "Recently Viewed" with a dropdown arrow and a refresh button. A message indicates "11 items • Updated a few seconds ago". To the right of this message is a search bar with the placeholder "Search this list..." and a magnifying glass icon. The main list is titled "Service records Name" and contains 11 items, numbered 1 to 11, each with a checkbox and a link to "ser-014", "ser-013", "ser-012", "ser-011", "ser-010", "ser-009", "ser-008", "ser-007", "ser-006", "ser-005", and "ser-004".

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

The screenshot shows a modal dialog for editing a service record. At the top left is a close button (X). Below it is a "Quality Check Status" field containing a checked checkbox, which is highlighted with a yellow background. To the right of this field is a back arrow icon. Below the quality check status is a "Service Status" field with a dropdown menu showing "Started".

5. Click on save.

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

The screenshot shows a software interface for 'Garage Management'. At the top, there's a navigation bar with links for 'Customer Details', 'Service records', 'Billing details and feedbacks' (which is the active tab), 'Reports', 'Dashboards', and 'Appointments'. Below the navigation is a search bar and a toolbar with 'New Contact' and 'Edit' buttons. The main area displays a service record for 'bill-010'. The record includes fields for 'Billing details and feedback Name' (bill-010), 'Service records' (ser-013), 'Payment Paid' (checkbox), 'Rating for service' (4), 'Payment Status' (Completed), and 'Created By' (Roshini S. on 9/13/2025, 5:31 AM). On the right side, there's a large blue placeholder area labeled 'Placeholder'.

Final Output

