

# **GARAGE MANAGEMENT SYSTEM**

1

---

**By**

**Rusum Nagamani**

**[nagamanirusum@gmail.com](mailto:nagamanirusum@gmail.com)**

# ABSTRACT

The Garage Management System (GMS) is an all-in-one solution designed to streamline operations for automotive repair shops and garages. With its intuitive user interface and robust features, GMS enables businesses to deliver exceptional service, enhance productivity, and foster long-term customer loyalty.

## Key Technologies

**Salesforce CRM:** Centralizes customer data, service history, and communication, allowing personalized interactions and streamlined management.

**Salesforce Service Cloud:** Manages service cases, work orders, and repair tracking. Automates customer support and communication for timely updates.

**Salesforce Analytics and Reporting:** Generates insightful reports and dashboards, helping businesses make data-driven decisions on performance, revenue, and customer trends.

**Salesforce Integration Tools (APIs):** Facilitates integration with third-party systems, such as accounting software, parts inventory, and payment gateways, ensuring seamless operations.

## Benefits

- Improved Operational Efficiency
- Enhanced Customer Satisfaction
- Real-Time Access and Updates
- Comprehensive Reporting
- Scalability and Customization

By incorporating Salesforce's technologies into GMS, garages can boost productivity, improve customer satisfaction.

## INDEX PAGE

S.NO	TOPIC	PAGE NO
1.	ABSTRACT	3
2.	OBJECT	4-8
3.	TABS	9
4.	LIGHTNING APP	11-12
5.	FIELDS	13
6.	VALIDATION RULE	14 <sup>3</sup>
7.	DUPLICATE RULE	15
8.	PROFILES	16
9.	ROLES	17
10.	USERS	18
11.	PUBLIC GROUPS	19
12	SHARING SETTINGS	20
12.	FLOWS	21-23
13.	APEX TRIGGER	24-25

14.	REPORTS	26-27
15.	DASHBOARDS	28-29

# **PROCESS OF GARAGE MANAGEMENT SYSTEM**

## **1.OBJECT CREATION**

Salesforce objects are database tables that permit you to store data that is specific to an organization. What are the types of Salesforce objects

Salesforce objects are of two types:

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

**Custom Objects:** Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.

5

- **CREATION OF “CUSTOMER DETAILS OBJECT”**

1. To create an object:
2. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
3. Enter the label name >> Customer Details
4. Plural label name >> Customer Details
5. Enter Record Name Label and Format
6. Record Name >> Customer Name
7. Data Type >> Text
8. Click on Allow reports and Track Field History,
9. Allow search >> Save

- **CREATION OF “APPOINTMENT” OBJECT:**

To create an object:

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

6

- **CREATION OF “APPOINTMENT” OBJECT**

To create an object:

From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

Enter the label name >> Service records

Plural label name >> Service records

Enter Record Name Label and Format

Record Name >>Service recordsName

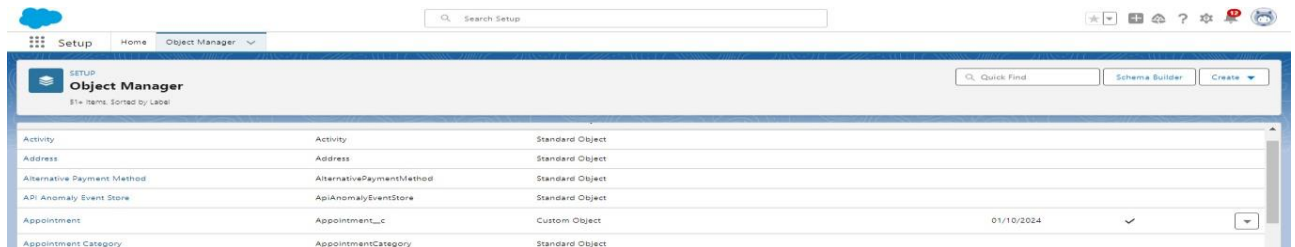
Data Type >> Auto Number

Display Format >> ser-{000}

Starting number >> 1

Click on Allow reports and Track Field History,  
Allow search >> Save.

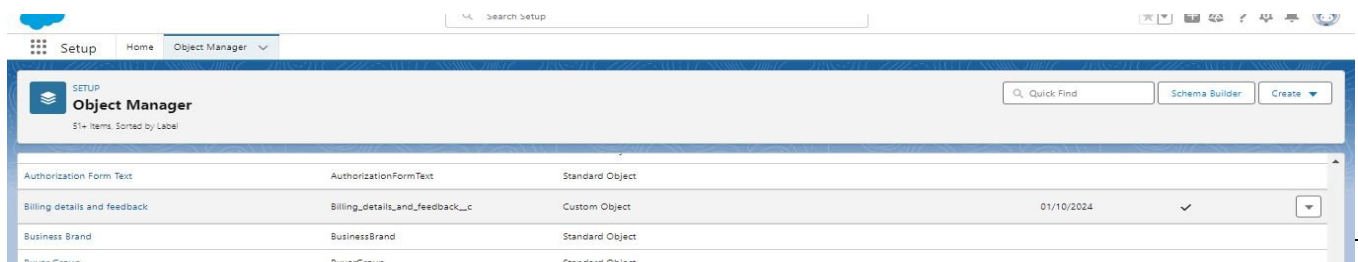
RESULTING PAGE OF AFTER CREATING OBJECTIVES:



Object Manager

31+ Items, Sorted by Label

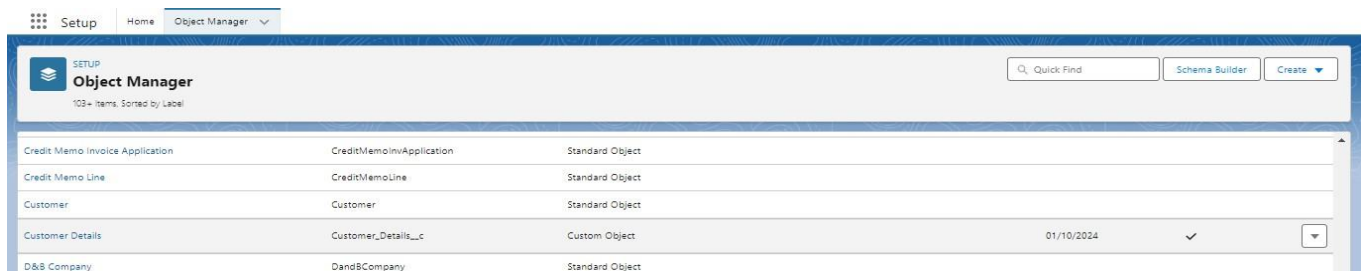
Activity	Activity	Standard Object		
Address	Address	Standard Object		
Alternative Payment Method	AlternativePaymentMethod	Standard Object		
API Anomaly Event Store	ApiAnomalyEventStore	Standard Object		
Appointment	Appointment_c	Custom Object	01/10/2024	✓
Appointment Category	AppointmentCategory	Standard Object		



Object Manager

5+ Items, Sorted by Label

Authorization Form Text	AuthorizationFormText	Standard Object		
Billing details and feedback	Billing_details_and_feedback_c	Custom Object	01/10/2024	✓
Business Brand	BusinessBrand	Standard Object		
Business Form	BusinessForm	Standard Object		



Object Manager

103+ Items, Sorted by Label

Credit Memo Invoice Application	CreditMemoInvApplication	Standard Object		
Credit Memo Line	CreditMemoLine	Standard Object		
Customer	Customer	Standard Object		
Customer Details	Customer_Details_c	Custom Object	01/10/2024	✓
D&B Company	DandBCompany	Standard Object		

SetupHomeObject Manager

SETUP

Object Manager

203 Items, Sorted by Label

Quick Find

Schema Builder

Create

Scorecard	Scorecard	Standard Object		
Scorecard Association	ScorecardAssociation	Standard Object		
Scorecard Metric	ScorecardMetric	Standard Object		
Seller	Seller	Standard Object		
Service Appointment	ServiceAppointment	Standard Object		
Service Appointment Attendee	ServiceAppointmentAttendee	Standard Object		
Service Contract	ServiceContract	Standard Object		
Service records	Service_records__c	Custom Object	01/10/2024	✓



## 2.TABS:

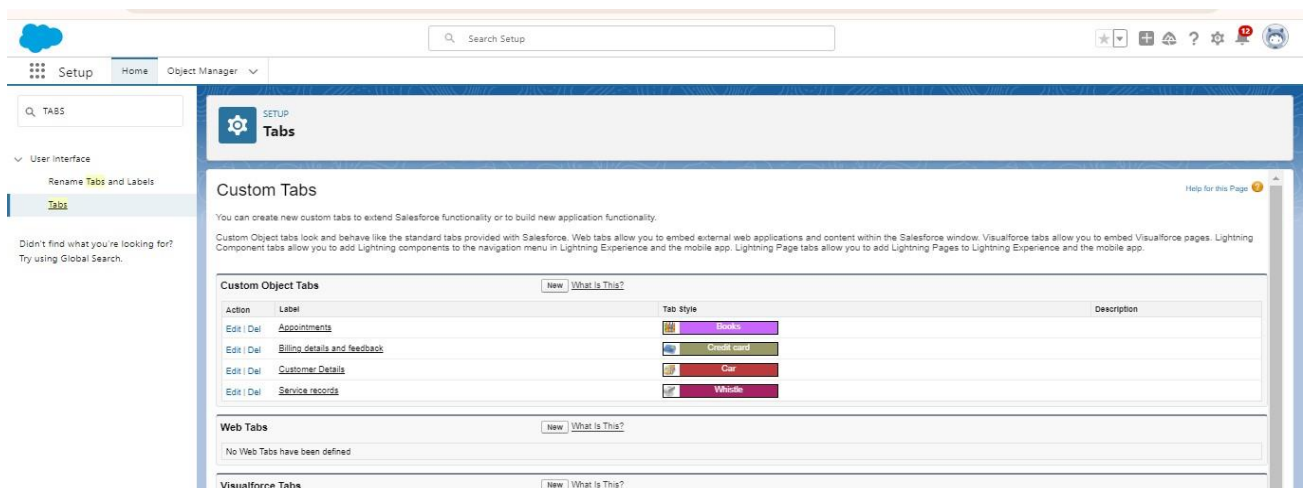
- To create a Tab:(Customer Details)

Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)

- 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 .
- Make sure that the Append tab to users' existing personal customizations is checked.
- Click save.
- Now create the Tabs for the remaining Objects, they are “ Appointments, Service records,Billing details and feedback”.

## RESULTING PAGE OF AFTER CREATING TABS:

9



### 3. The Lightning App:

- To create a lightning app page:
- Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App
- 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.
- To Add Navigation Items:
- Select the items (Customer Details,Appointments, Service records, Billing details and feedback, Reports and Dashboards) from the search bar and move it using the arrow button >> Next.
- To Add User Profiles:
- Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.

10

## RESULTING PAGE OF LIGHTNING APP

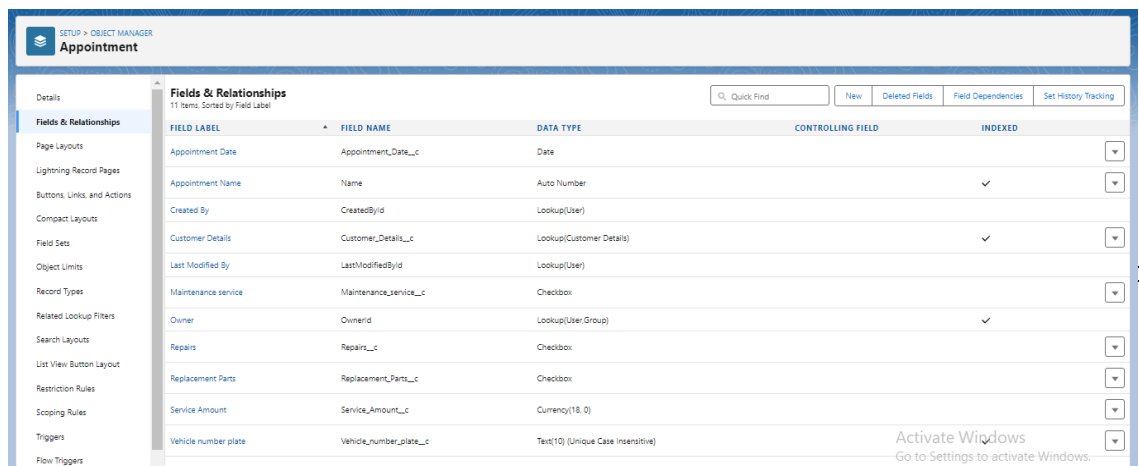
The screenshot shows the 'App Details & Branding' configuration page in the Lightning App Builder. The left sidebar lists navigation options: App Settings, App Details & Branding (selected), App Options, Utility Items (Desktop Only), Navigation Items, and User Profiles. The main content area is divided into two columns. The left column, 'App Details', contains fields for 'App Name' (Garage Management Application), 'Developer Name' (Garage\_Management\_Application), and 'Description' (a text area with the placeholder 'Enter a description...'). The right column, 'App Branding', includes an 'Image' upload section with an 'Upload' button, a 'Primary Color Hex Value' dropdown set to '#0070D2', and an 'Org Theme Options' checkbox (unchecked) with the label 'Use the app's image and color instead of the org's custom theme'. At the bottom, an 'App Launcher Preview' shows a blue square icon with 'GM' and the text 'Garage Management Appli...'.

## 4.FIELDS:

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

## RESULTING PAGE OF EACH OBJECT:

- APPOINTMENT OBJECT

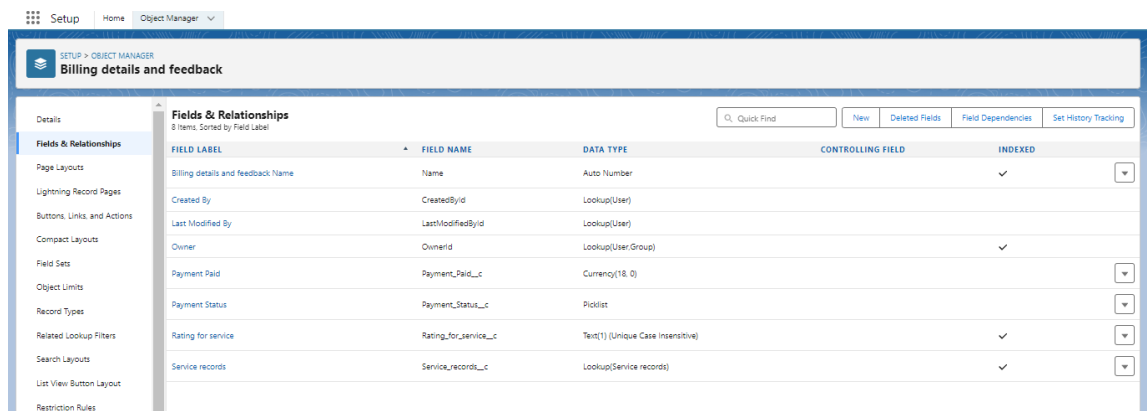


The screenshot shows the 'Appointment' object configuration page. The left sidebar contains a list of configuration options, with 'Fields & Relationships' selected. The main area displays a table of fields for the 'Appointment' object, sorted by Field Label. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. There are 11 items listed.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment Date	Appointment_Date__c	Date		
Appointment Name	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Customer Details	Customer_Details__c	Lookup(Customer Details)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Maintenance service	Maintenance_service__c	Checkbox		
Owner	OwnerId	Lookup(User/Group)		✓
Repairs	Repairs__c	Checkbox		
Replacement Parts	Replacement_Parts__c	Checkbox		
Service Amount	Service_Amount__c	Currency(18, 0)		
Vehicle number plate	Vehicle_number_plate__c	Text(10) (Unique Case Insensitive)		

At the bottom right, there is a message: 'Activate Windows Go to Settings to activate Windows.'

- BILLING DETAILS AND FEED BACK OBJECT:



The screenshot shows the 'Billing details and feedback' object configuration page. The left sidebar contains a list of configuration options, with 'Fields & Relationships' selected. The main area displays a table of fields for the 'Billing details and feedback' object, sorted by Field Label. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed status. There are 8 items listed.

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

- CUSTOMER DETAILS OBJECT:

Setup Home Object Manager

Customer Details

Details

Fields & Relationships

7 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer Details	Customer_Details__c	Lookup(Customer Details)		✓
Customer Name	Name	Text(80)		✓
Gmail	Gmail__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User Group)		✓
Phone number	Phone_number__c	Phone		

- SERVICE RECORDS OBJECT:

Setup Home Object Manager

Service records

Details

Fields & Relationships

8 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

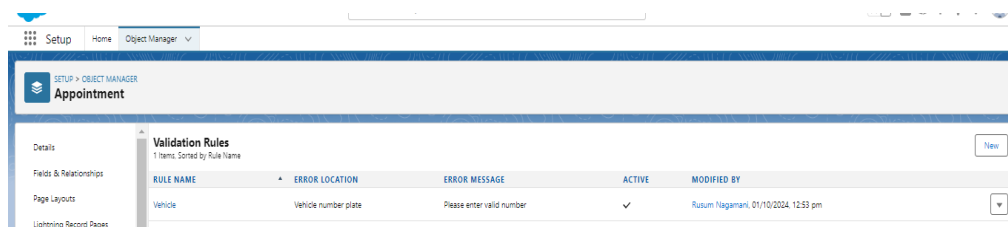
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment	Appointment__c	Lookup(Appointment)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User Group)		✓
Quality Check Status	Quality_Check_Status__c	Checkbox		
service date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

## 5.VALIDATION RULE:

- Go to the setup page >> click on object manager >> From drop down click edit for Appointment object.
- Click on the validation rule >> click New.
- Enter the Rule name as “ ”.
- Insert the Error Condition Formula
- Enter the Error Message as “ ”, select the Error location as Field and select the field as “ ”, and click Save.

## RESULTING OF VALIADATION RULE IN EACH OBJECT

- APPIONTMENT OBJECT

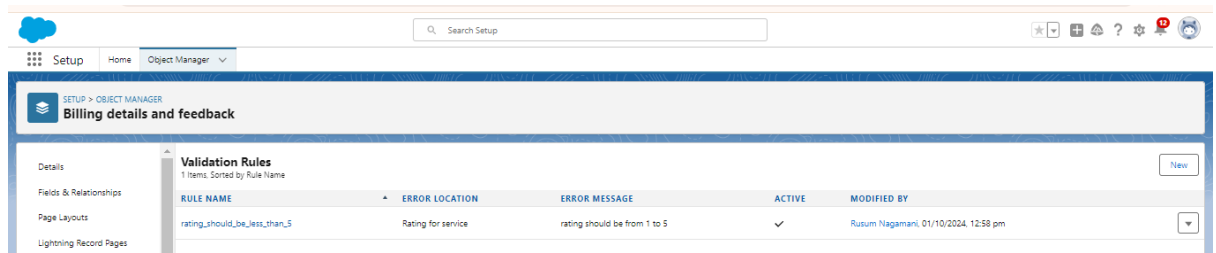


The screenshot shows the 'Appointment' object page in the Salesforce Setup interface. The 'Validation Rules' section is active, displaying a table with one rule. The table has columns for Rule Name, Error Location, Error Message, Active status, and Modified By. The rule is named 'Vehicle', located at 'Vehicle number plate', with the message 'Please enter valid number'. It is active and was modified by 'Rusum Nagamani' on '01/10/2024, 12:53 pm'.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Vehicle	Vehicle number plate	Please enter valid number	✓	Rusum Nagamani, 01/10/2024, 12:53 pm

- BILLING DETAILLS AND FEEDBACK OBJECT:

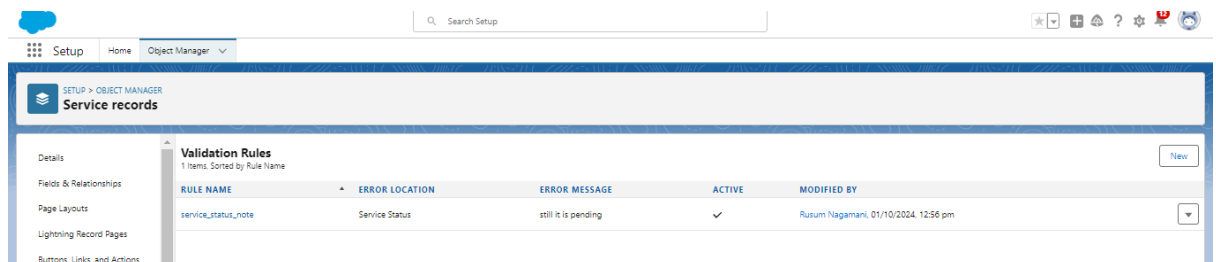
13



The screenshot shows the 'Billing details and feedback' object page in the Salesforce Setup interface. The 'Validation Rules' section is active, displaying a table with one rule. The table has columns for Rule Name, Error Location, Error Message, Active status, and Modified By. The rule is named 'rating\_should\_be\_less\_than\_5', located at 'Rating for service', with the message 'rating should be from 1 to 5'. It is active and was modified by 'Rusum Nagamani' on '01/10/2024, 12:58 pm'.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
rating_should_be_less_than_5	Rating for service	rating should be from 1 to 5	✓	Rusum Nagamani, 01/10/2024, 12:58 pm

- SERVICE RECORDS OBJECT:



The screenshot shows the 'Service records' object page in the Salesforce Setup interface. The 'Validation Rules' section is active, displaying a table with one rule. The table has columns for Rule Name, Error Location, Error Message, Active status, and Modified By. The rule is named 'service\_status\_note', located at 'Service Status', with the message 'still it is pending'. It is active and was modified by 'Rusum Nagamani' on '01/10/2024, 12:56 pm'.

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
service_status_note	Service Status	still it is pending	✓	Rusum Nagamani, 01/10/2024, 12:56 pm

## 6.DUPLICATE RULE:

Go to quick find box in setup and search for matching Rule.

Click on matching rule >> click on New Rule.

Select the object as Customer details and click Next.

Give the Rule name : Matching customer details

Unique name : is auto populated

Define the matching criteria as

Field	Matching Method
1. Gmail	Exact
2. Phone Number	Exact

Click save.

After Saving Click on Activate.

## RESULT PAGE OF DUPLICATE RULES:

14

The screenshot displays the Salesforce Setup interface. The left sidebar contains navigation links such as 'Setup Home', 'Service Setup Assistant', 'Commerce Setup Assistant', 'Multi-Factor Authentication Assistant', 'Hyperforce Assistant', 'Release Updates', 'Lightning Experience Transition Assistant', 'Salesforce Mobile App', 'Lightning Usage', 'Optimizer', and 'Sales Cloud Everywhere'. The main content area is titled 'Duplicate Rules' and includes a search bar, a 'What Are Duplicate Rules?' section with an 'Expand' link, and a table of existing rules. The table has columns for Rule Name, Description, Object, Matching Rule, Active status, Last Modified By, and Last Modified Date. It lists four standard duplicate rules: Customer Detail Duplicate Rule, Standard Account Duplicate Rule, Standard Contact Duplicate Rule, and Standard Lead Duplicate Rule, all of which are active and were last modified by 'RUpa' on 01/10/2024.

Rule Name	Description	Object	Matching Rule	Active	Last Modified By	Last Modified Date
Customer Detail Duplicate Rule	Identify accounts that duplicate other accounts.	Account	Matching customer details	✓	RUpa	01/10/2024
Standard Account Duplicate Rule	Identify accounts that duplicate other accounts.	Account	Standard Account Matching Rule	✓	RUpa	01/10/2024
Standard Contact Duplicate Rule	Identify contacts that duplicate other contacts and leads.	Contact	Standard Lead Matching Rule	✓	RUpa	01/10/2024
Standard Lead Duplicate Rule	Identify leads that duplicate other leads and contacts.	Lead	Standard Contact Matching Rule	✓	RUpa	01/10/2024

## 7.PROFILES:

- Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (Manager) >> Save.
- While still on the profile page, then click Edit.
- Select the Custom App settings as default for the Garage management.
- Scroll down to Custom Object Permissions and Give access permissions for Appointments,Billing details and feedback , service records and customer details objects as mentioned in the below diagram.
- Changing the session times out after should be “ 8 hours of inactivity”.
- Change the password policies as mentioned :
- User passwords expire in should be “ never expires ”.
- Minimum password length should be “ 8 ”, and click save

15

## RESULT PAGE OF PROFILES:

The screenshot displays the Salesforce 'Profiles' setup page. The left sidebar shows the navigation menu with 'Setup' and 'Home' options. The main content area is titled 'Profiles' and includes a search bar and a list of profiles. The 'Custom' profile is selected, and its settings are visible on the right. The 'User License' dropdown is set to 'Custom'.

Action	Profile Name	User License
<input type="checkbox"/> Edit   Clone	Chatter Moderator User	Chatter Free
<input type="checkbox"/> Edit   Clone	Contract Manager	Salesforce
<input type="checkbox"/> Edit   Clone	Cross Org Data Proxy User	XOrg Proxy User
<input type="checkbox"/> Edit   Del   ...	Custom Marketing Profile	Salesforce
<input type="checkbox"/> Edit   Del   ...	Custom Sales Profile	Salesforce
<input type="checkbox"/> Edit   Del   ...	Custom Support Profile	Salesforce
<input type="checkbox"/> Edit   Clone	Customer Community Login User	Customer Community Login
<input type="checkbox"/> Edit   Clone	Customer Community Plus Login User	Customer Community Plus Login
<input type="checkbox"/> Edit   Clone	Customer Community Plus User	Customer Community Plus
<input type="checkbox"/> Edit   Clone	Customer Community User	Customer Community
<input type="checkbox"/> Edit   Clone	Customer Portal Manager Custom	Customer Portal Manager Custom
<input type="checkbox"/> Edit   Clone	Customer Portal Manager Standard	Customer Portal Manager Standard

## 8.Role & Role Hierarchy

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

### Creating Manager Role:

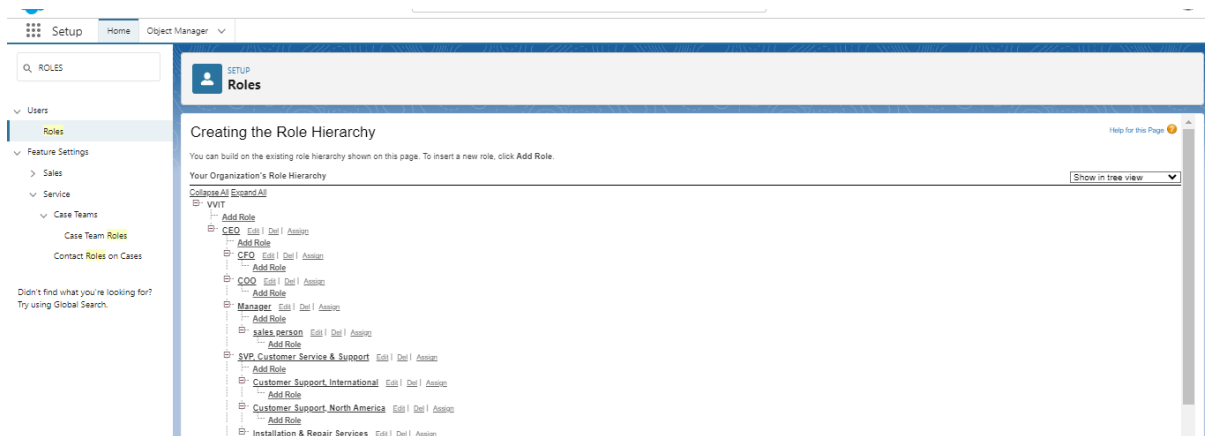
Go to quick find >> Search for Roles >> click on set up roles.

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

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

Give the sales person followed by manager in its internal with same factors with the name”sales person”

### RESULT OF ROLES AND HEIARCHY:





## 9. Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

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

Role : Manager

User licence : Salesforce

Profiles : Manager

Save

Repeat the steps and create another user using

Role : sales person

User licence : Salesforce Platform

Profile : sales person

RESULT PAGE OF USERS:

Setup

Home

Object Manager

users

Users

Permission Set Groups

Permission Sets

Profiles

Public Groups

Queues

Roles

User Management Settings

**Users**

Feature Settings

Data.com

Prospector

Users

Didn't find what you're looking for?

Try using Global Search.

SETUP

Users

All Users

Help for this Page

On this page you can create, view, and manage users.

To get more licenses, use the Your Account app. [Let's Go](#)

View: All Users Edit Create New User

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

New User Reset Password(s) Add Multiple Users

<input type="checkbox"/>	Action Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	<a href="#">Edit</a> <a href="#">Chatter Expert</a>	<a href="#">Chatter</a>	<a href="#">chatty00dwu000000qz3w2aq.ick70nnnidy@chatter.salesforce.com</a>		✓	<a href="#">Chatter Free User</a>
<input type="checkbox"/>	<a href="#">Edit</a> <a href="#">kishore, yuva</a>	<a href="#">ykish</a>	<a href="#">yuvekishore@yuva.yuva</a>	<a href="#">sales person</a>	✓	<a href="#">sales person</a>
<input type="checkbox"/>	<a href="#">Edit</a> <a href="#">Mikaelson, Niklaus</a>	<a href="#">nmika</a>	<a href="#">hellomaru@manu.manu</a>	<a href="#">Manager</a>	✓	<a href="#">Manager</a>
<input type="checkbox"/>	<a href="#">Edit</a> <a href="#">Naqamani, Ruum</a>	<a href="#">RNaqa</a>	<a href="#">projectnaqamanager@gmail.com</a>		✓	<a href="#">System Administrator</a>
<input type="checkbox"/>	<a href="#">Edit</a> <a href="#">sisla, alekhiya</a>	<a href="#">asist</a>	<a href="#">sisla@alekhiya.sisla</a>	<a href="#">sales person</a>	✓	<a href="#">sales person</a>
<input type="checkbox"/>	<a href="#">Edit</a> <a href="#">thoti, anitha</a>	<a href="#">athot</a>	<a href="#">anitha@thoti.thoti</a>	<a href="#">sales person</a>	✓	<a href="#">sales person</a>
<input type="checkbox"/>	<a href="#">Edit</a> <a href="#">User, Integration</a>	<a href="#">integ</a>	<a href="#">integration@00dwu000000qz3w2aq.com</a>		✓	<a href="#">Analytics Cloud Integration User</a>
<input type="checkbox"/>	<a href="#">Edit</a> <a href="#">User, Security</a>	<a href="#">sec</a>	<a href="#">insightssecurity@00dwu000000qz3w2aq.com</a>		✓	<a href="#">Analytics Cloud Security User</a>

New User Reset Password(s) Add Multiple Users

## 10.PUBLIC GROUPS:

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

### Creating New Public Group

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

Give the Label as “sales team”.

Group name is autopopulated.

Search for Roles.

In Available Members select Sales person and click on add it will be moved to selected member.

Click on save.

19

### RESULT OF PUBLIC GROUPS:

The screenshot displays the Salesforce Setup interface for creating a new Public Group. The page title is "Public Groups". The "Group Membership" section shows "Group: sales team". The "Group Information" section includes fields for "Label" (sales team), "Group Name" (sales\_team), and "Grant Access Using Hierarchies" (checked). Below this is a search bar for "Public Groups". The "Available Members" list shows "--None--" and the "Selected Members" list shows "Role: sales person". There are "Add" and "Remove" buttons between the lists. The left sidebar shows the navigation menu with "Public Groups" highlighted under the "Users" section.

## 11. Sharing Setting

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

Go to setup >> type users in quick find box >> select Sharing Settings >> click Edit.

Change the OWD setting of the Service records Object to private .

Click on save and refresh.

Scroll down a bit, Click new on Service records sharing Rules.

Give the Label name as “ Sharing setting”

Rule name is auto populated.

In step 3 : Select which records to be shared, members of “ Roles ” >> “ Sales person”

In step 4: share with, select “ Roles ” >> “ Manager ”

In step 5 : Change the access level to “ Read / write ”.

Click on save.

### RESULT PAGE:

The screenshot displays the Salesforce 'Sharing Settings' page. The left sidebar shows the navigation menu with 'Setup' selected. The main content area is titled 'Sharing Settings' and contains a table of objects and their sharing settings. The 'Service Appointment' object is highlighted in blue. The table lists various objects and their sharing settings, including OWD (Owner Read/Write) and sharing rules. The 'Service Appointment' object is highlighted in blue, showing its OWD (Owner Read/Write) and sharing rules. The 'Service Appointment Attendee' object is also visible, showing its OWD (Private) and sharing rules. The 'Service Appointment' object is highlighted in blue.

Object	OWD	Sharing Rules
Promotion Segment	Private	Private
Queue	Public Read/Write	Private
Queued Party	Public Read/Write	Private
Queue Messaging Template	Public Read/Write	Private
Quick Text	Private	Private
Quick Text Usage	Private	Private
Rebate Payout Snapshot	Private	Private
Return Order	Private	Private
Scorecard	Private	Private
Seller	Private	Private
Service Appointment	Public Read/Write	Private
Service Appointment Attendee	Private	Private
Service Contract	Private	Private
Service Resource	Public Read/Write	Private
Service Territory	Public Read/Write	Private
Shift	Private	Private
Shipment	Private	Private
Shipping Carrier	Public Read Only	Private
Shipping Carrier Method	Public Read Only	Private
Shipping Configuration Set	Public Read Only	Private
Streaming Channel	Public Read/Write	Private
Tableau Host Mapping	Public Read Only	Private
User Provisioning Request	Private	Private
Waitlist	Private	Private
Web Cart Document	Private	Private

## 12.FLOWS

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

Select the Record-triggered flow and Click on Create.

Select the Object as “Billing details and feedback” in the Drop down list.

Select the Trigger Flow when: “A record is Created or Updated”.

Select the Optimize 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”.

Give the Label Name : Amount Update

Api name : is auto populated

Set a filter condition : All Conditions are met(AN

Field : Payment\_Status\_\_c

Operator : Equals Value : Completed

And Set Field Values for the Billing details and feedback Record

Field	Payment_Paid__c	Value
		: {!\$Record.Service_records__r.Appointment__r.Service_Amount__c}

Click On Done.

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

Click on the New Resource, And select Variable.

Select the resource type as text template Enter the API name as “ alert”.

Change the view as Rich Text ? View to Plain Text.

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 .

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:

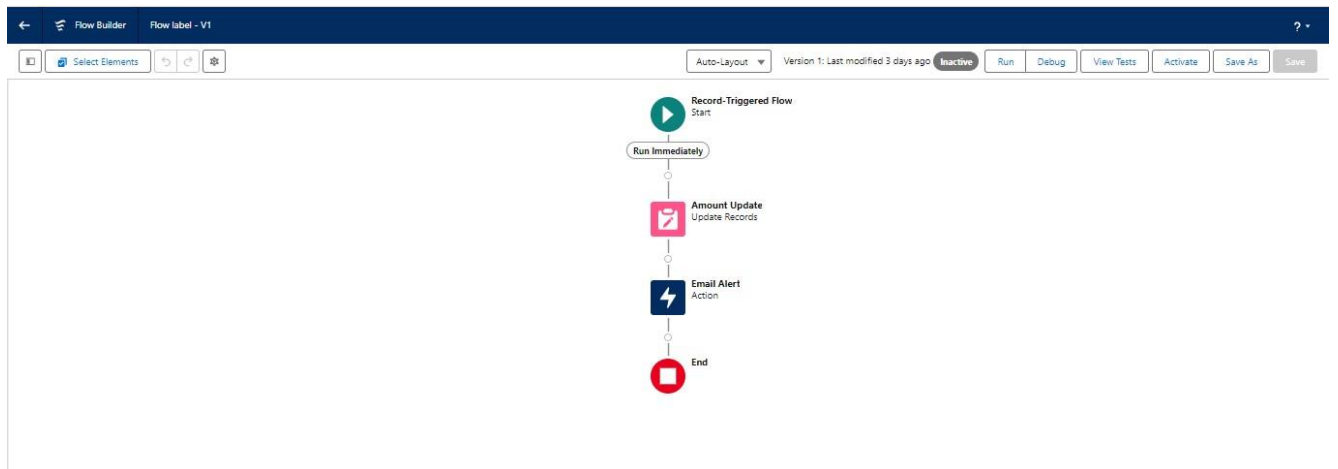
{!\$Record.Service\_records\_\_r.Appointment\_\_r.Customer\_Name\_\_r.  
Gmail\_\_c }

32. Include subject as “ Thank You for Your Payment - Garage Management”.

33. Click done.

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

## RESULT OF FLOW:



## 13.APEX TRIGGER:

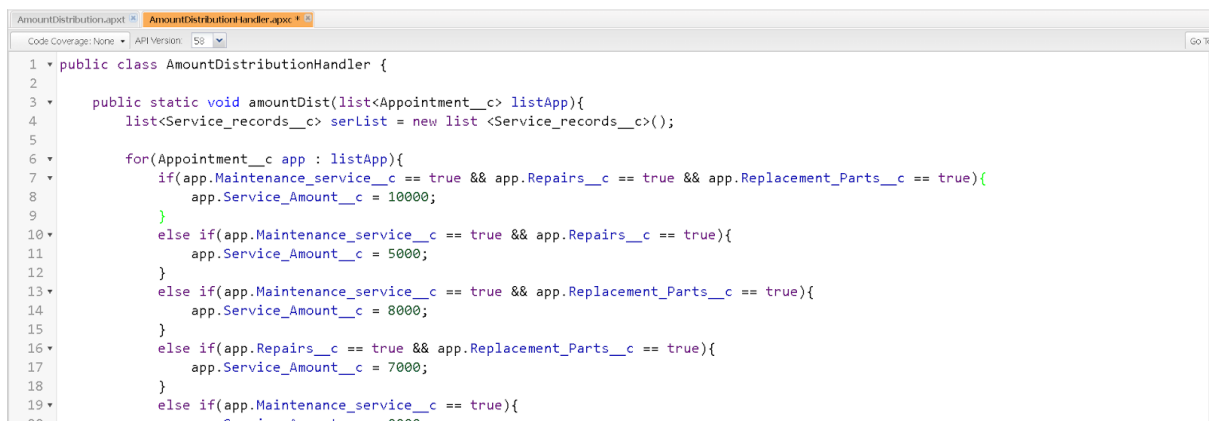
Apex can be invoked by using triggers. Apex triggers enable you to perform custom actions before or after changes to Salesforce records, such as insertions, updates, or deletions.

Login to the respective trailhead account and navigate to the gear icon in the top right corner.

Click on the Developer console. Now you will see a new console window.

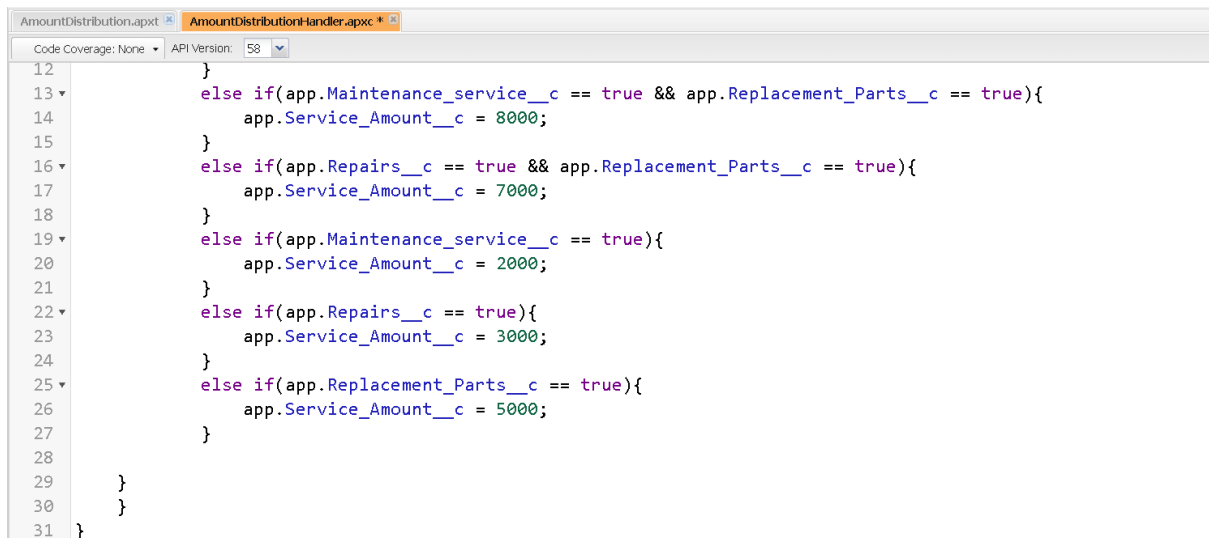
In the toolbar, you can see FILE. Click on it and navigate to new and create New apex class.

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;
```





```
12 }
13 else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
14     app.Service_Amount__c = 8000;
15 }
16 else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
17     app.Service_Amount__c = 7000;
18 }
19 else if(app.Maintenance_service__c == true){
20     app.Service_Amount__c = 2000;
21 }
22 else if(app.Repairs__c == true){
23     app.Service_Amount__c = 3000;
24 }
25 else if(app.Replacement_Parts__c == true){
26     app.Service_Amount__c = 5000;
27 }
28
29 }
30 }
31 }
```

## CODE:

```
public class AmountDistributionHandler {
```

```
    public static void amountDist(list<Appointment__c> listApp){
```

```
        list<Service_records__c> serList = new list <Service_records__c>();
```

```
        for(Appointment__c app : listApp){
```

```
            if(app.Maintenance_service__c == true && app.Repairs__c == true &&
app.Replacement_Parts__c == true){
```

```
                app.Service_Amount__c = 10000;
```

```
            }
```

```
            else if(app.Maintenance_service__c == true && app.Repairs__c == true){
```

```
                app.Service_Amount__c = 5000;
```

```
            }
```

```
            else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
```

```
                app.Service_Amount__c = 8000;
```

```
            }
```

```
            else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
```

```
                app.Service_Amount__c = 7000;
```

```
            }
```

```
            else if(app.Maintenance_service__c == true){
```

```

        app.Service_Amount__c = 2000;
    }

    else if(app.Repairs__c == true){
        app.Service_Amount__c = 3000;
    }

    else if(app.Replacement_Parts__c == true){
        app.Service_Amount__c = 5000;
    }

}

}

}

```

## Trigger Handler :

26

How to create a new trigger :

While still in the trailhead account, navigate to the gear icon in the top right corner.

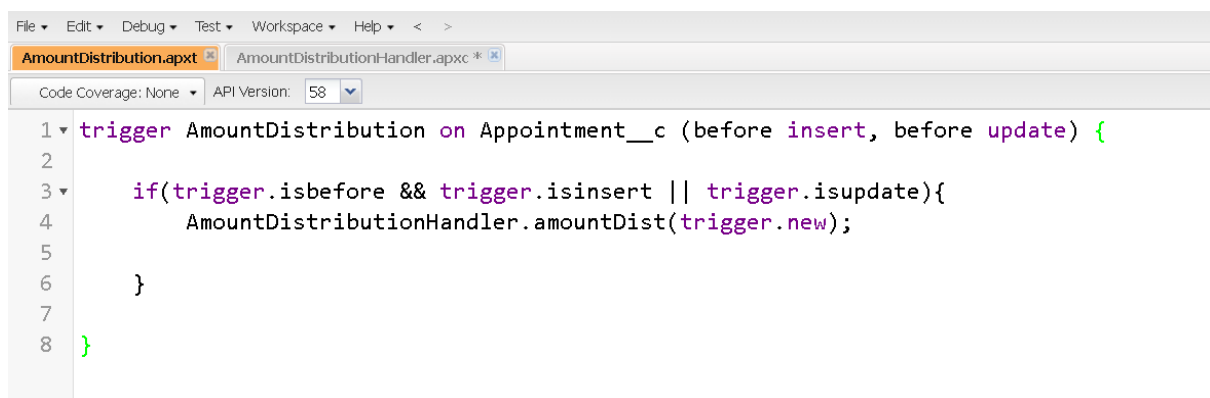
Click on developer console and you will be navigated to a new console window.

Click on File menu in the tool bar, and click on new? Trigger.

Enter the trigger name and the object to be triggered.

Name : AmountDistribution

sObject : Appointment\_\_c



The screenshot shows the Salesforce IDE interface. The top menu bar includes File, Edit, Debug, Test, Workspace, and Help. Below the menu bar, there are two tabs: 'AmountDistribution.apxt' (active) and 'AmountDistributionHandler.apxc \*'. The status bar at the bottom indicates 'Code Coverage: None' and 'API Version: 58'. The main editor area displays the following Apex code:

```

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);
```

```
}
```

```
}
```

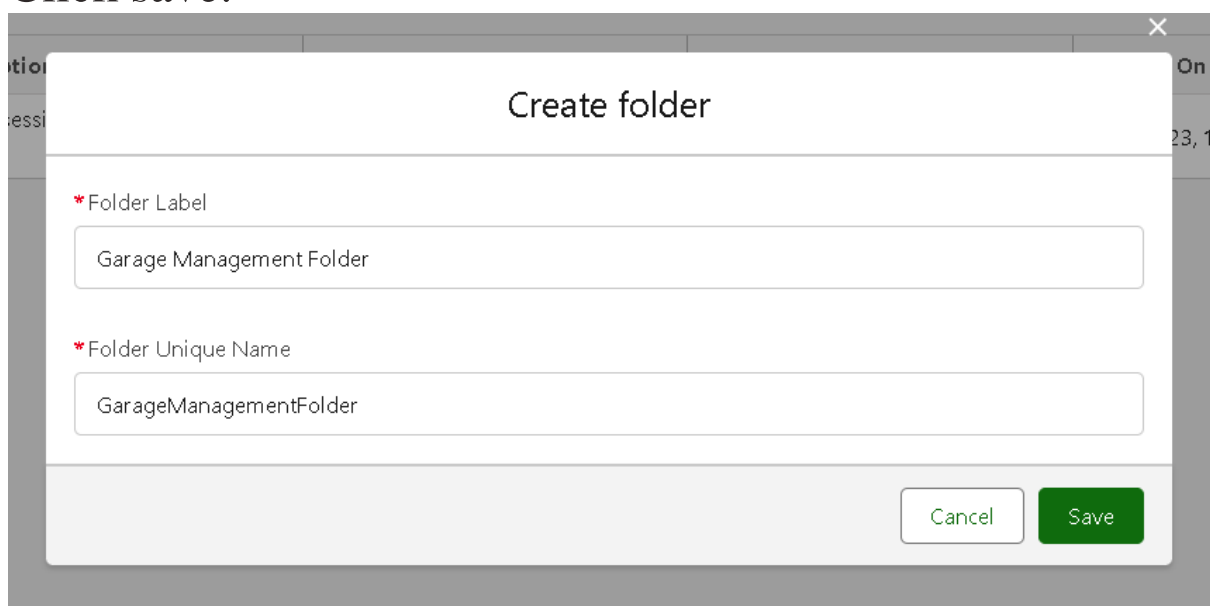
## 14.CREATE REPORT:

Click on the app launcher and search for reports.

Click on the report tab, click on new folder

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

Click save.



tion

On

23, 1

Create folder

\* Folder Label

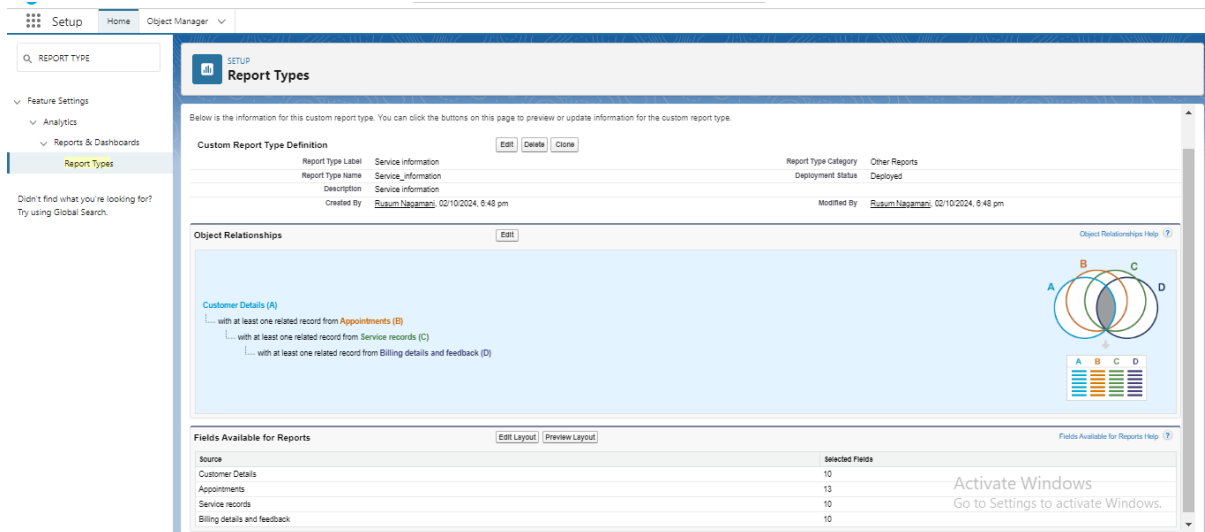
Garage Management Folder

\* Folder Unique Name

GarageManagementFolder

Cancel Save

## RESULT OF SHARING REPORTS:



## 15.DASHBOARDS:

Click on the app launcher and search for dashboard.

Click on dashboard tab.

Click new folder, give the folder label as “ Service Ratingg dashboard”.

Folder unique name will be auto populated.

Click save

The 'Create folder' dialog box contains the following fields and buttons:

- Folder Label:** Service Rating
- Folder Unique Name:** ServiceRating
- Buttons:** Cancel, Save

Go to the app >> click on the Dashboards tabs.

Give a Name and select the folder that created, and click on create.

Select add component.

Select the Line Chart. Change the theme.

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

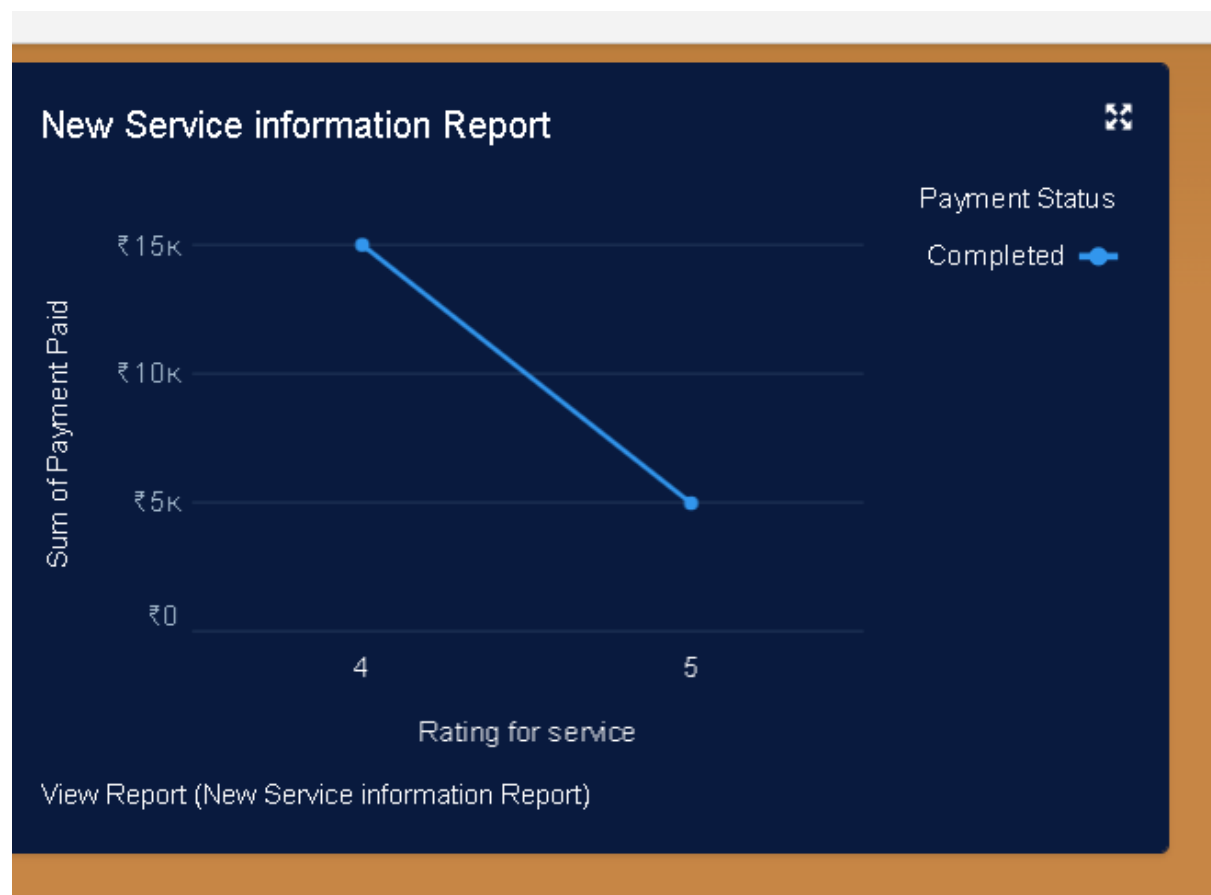
Preview is shown below.

After that Click on Subscribe on top right.

Set the Frequency as “ weekly ”.

Set a day as monday.

And Click on save.



# THANKYOU