GARAGE MANAGEMENT SYSTEM

Introduction:

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.
Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?".

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.
Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:
https://youtu.be/r9EX3lGde5k

GARAGE MANAGEMENT SYSTEM

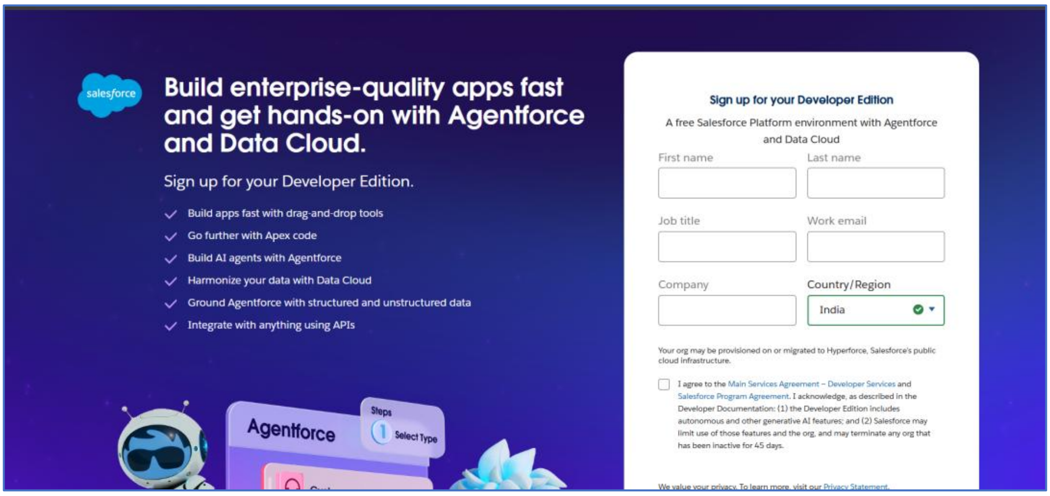
MILESTONE -1

Salesforce

ACTIVITY – 1: - Creating Developer Account:

Creating a developer org in salesforce.

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

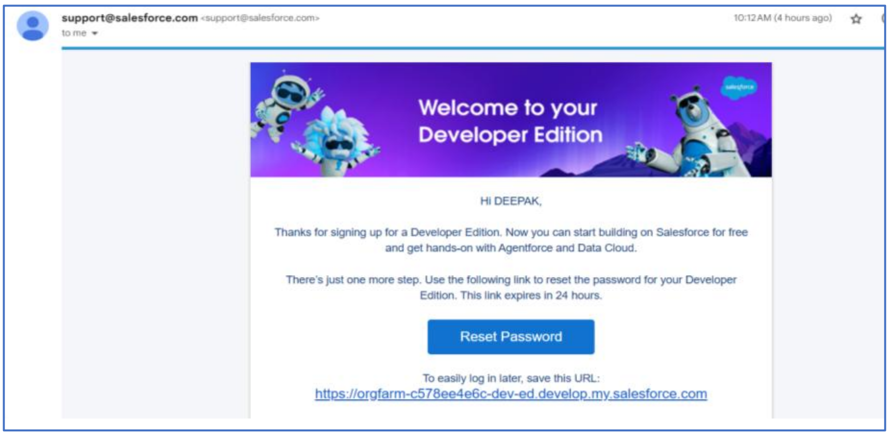


- **FIRST NAME:** YUVASREE
- **LAST NAME:** NETHAM
- **JOB TITLE:** Developer
- **WORK EMAIL:** yuvasreenetham751@gmail.com
- **COMPANY:** Gayatri Degree College Tirupati
- **COUNTRY/ REGION:** India

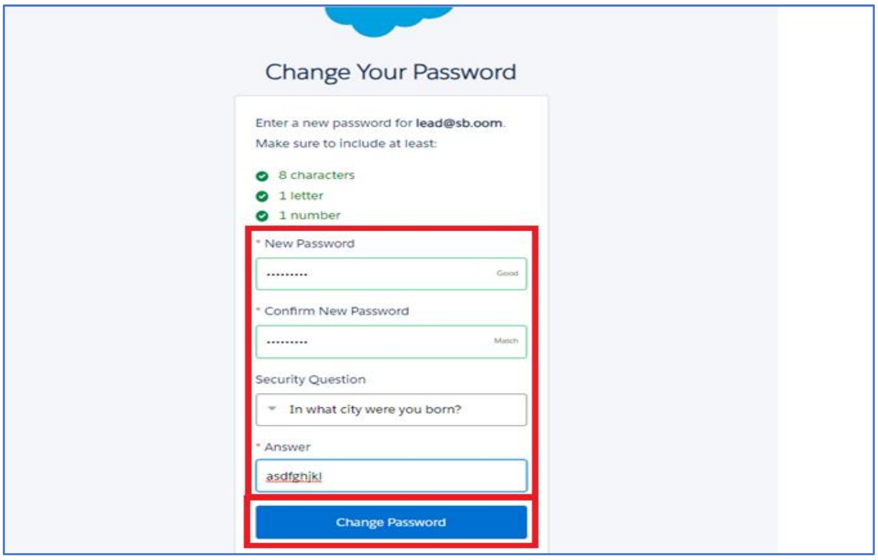
Activity 2: Account Activation:

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.

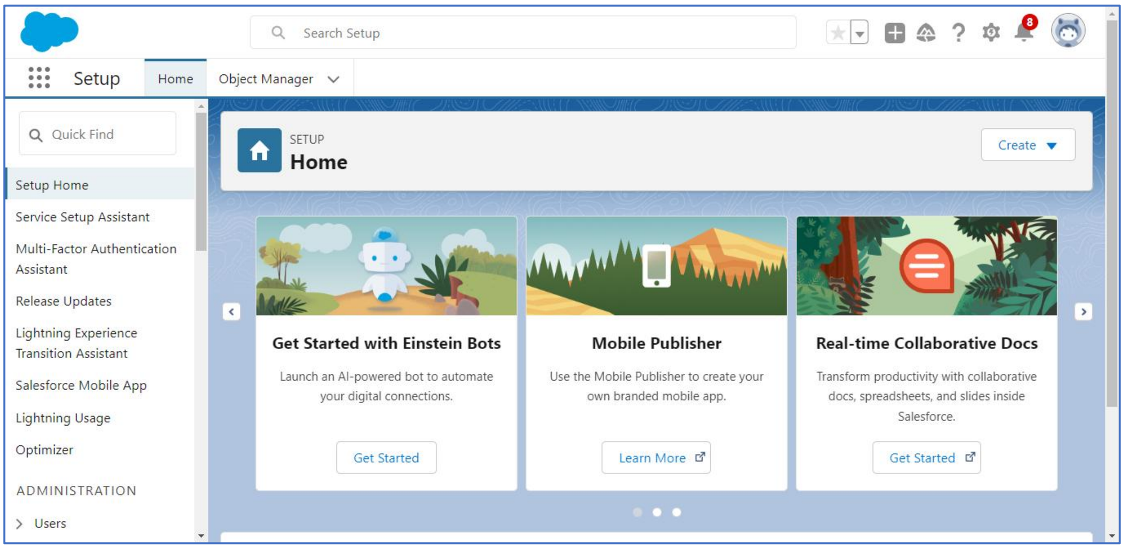


2. Click on Verify Account
3. Give a password and answer a security question and click on change password.



GARAGE MANAGEMENT SYSTEM

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



MILESTONE – 2

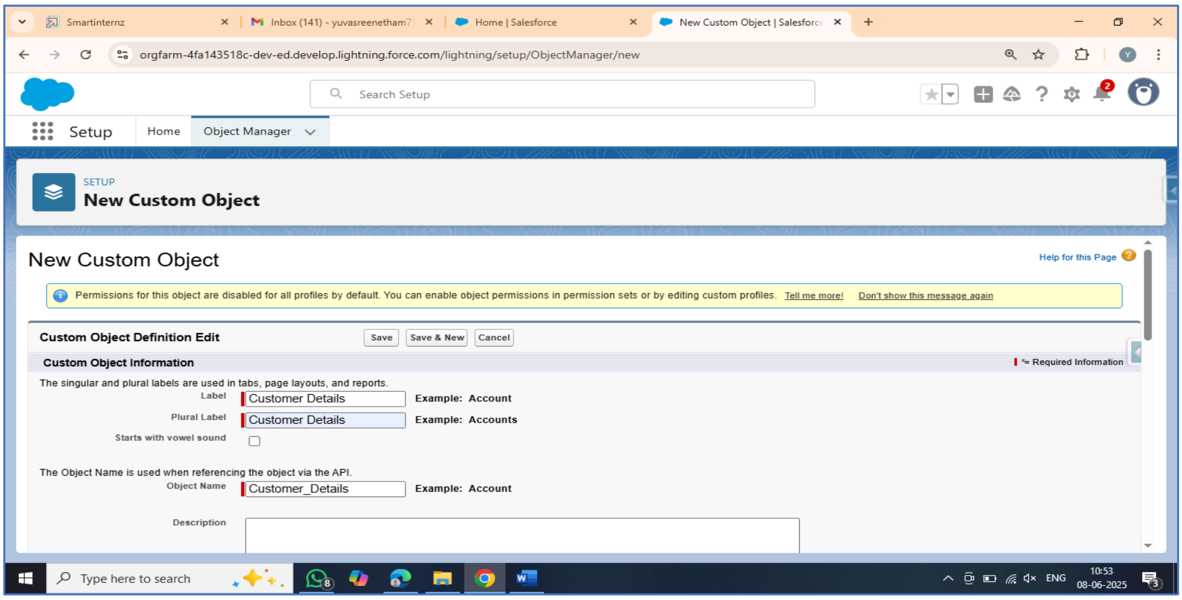
OBJECT

ACTIVITY – 1: Create Customer Details Object

To create an object:

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

2. Enter the label name >> Customer Details
3. Plural label name >> Customer Details



4. Enter Record Name Label and Format
5. Record Name >> Customer Name
6. Data Type >> Text

➢ Click on Allow reports and Track Field History.

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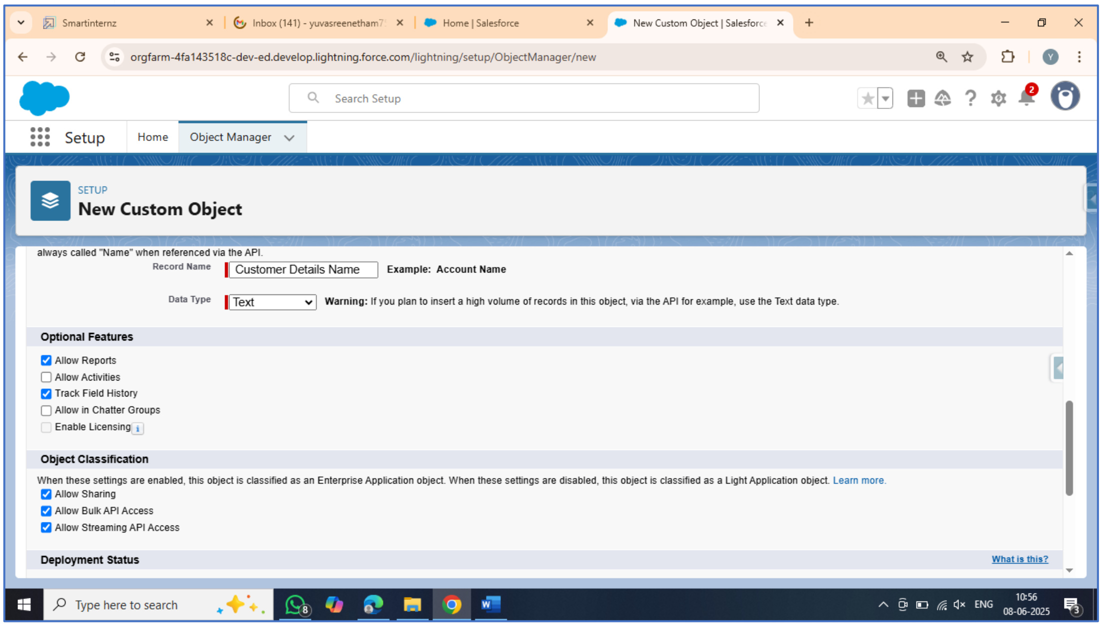
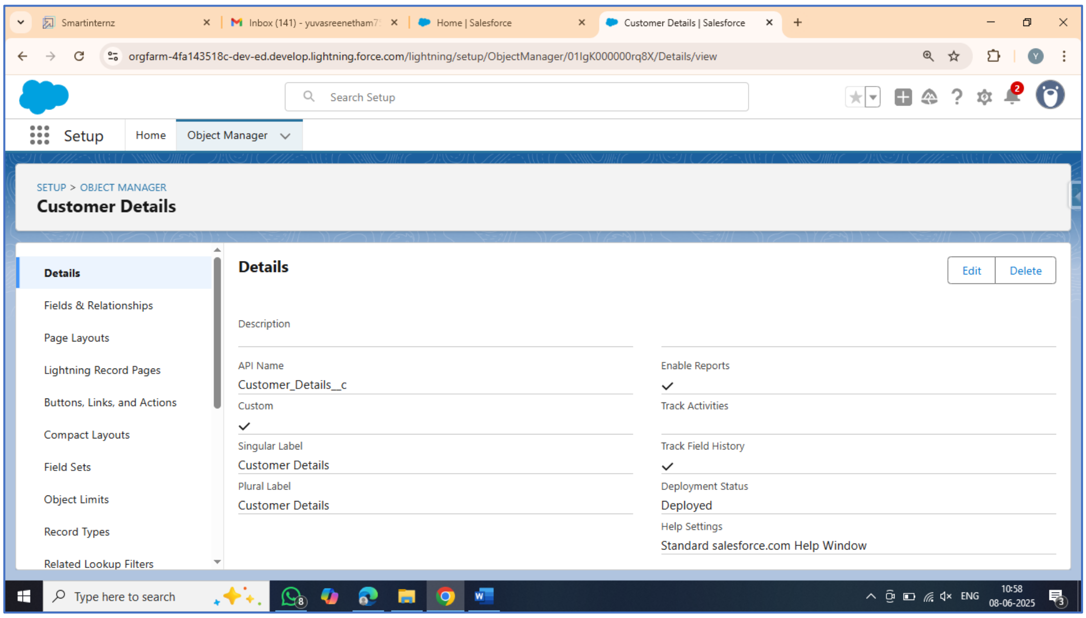


7. Allow search > > Save.

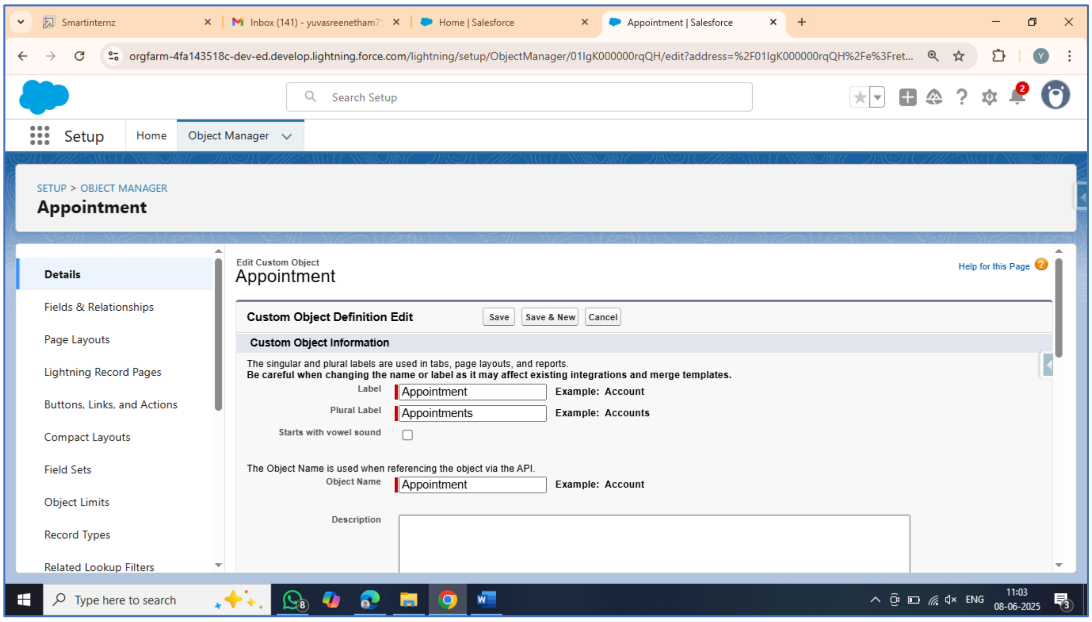


ACTIVITY – 2 : Create Appointment Object

To create an object:

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

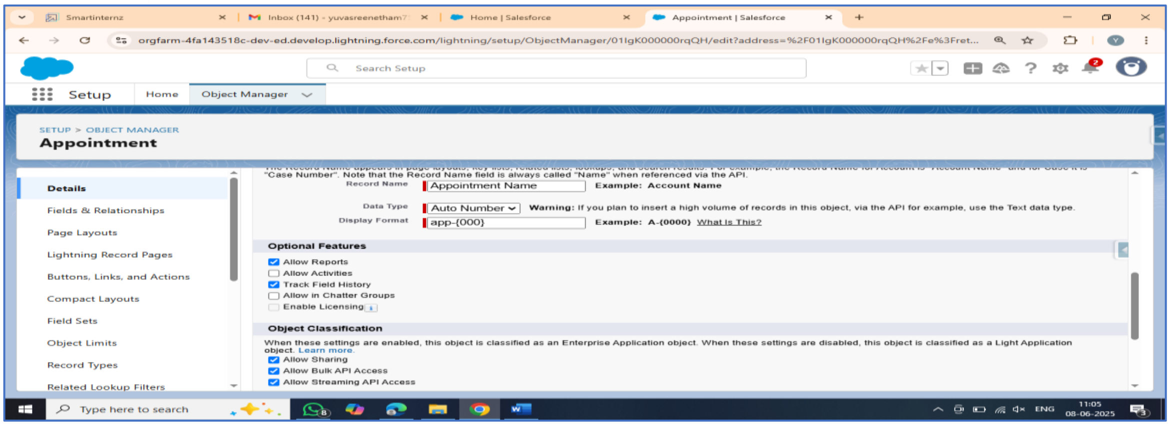
2. Enter the label name >> Appointment
3. Plural label name >> Appointments



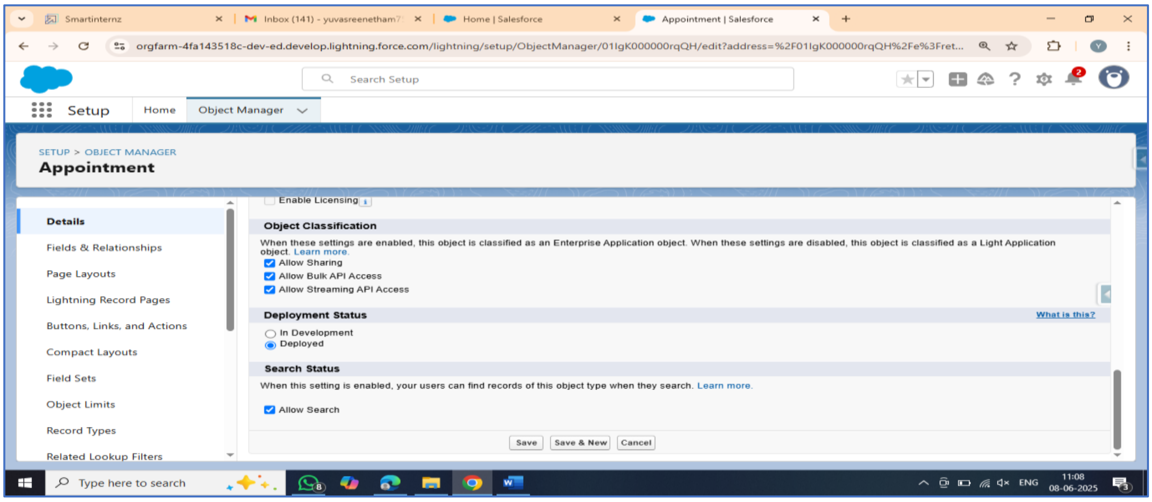
3. Enter Record Name Label and Format
   - Record Name >> Appointment Name
   - Data Type >> Auto Number
   - Display Format >> app- {000}
   - Starting number >> 1

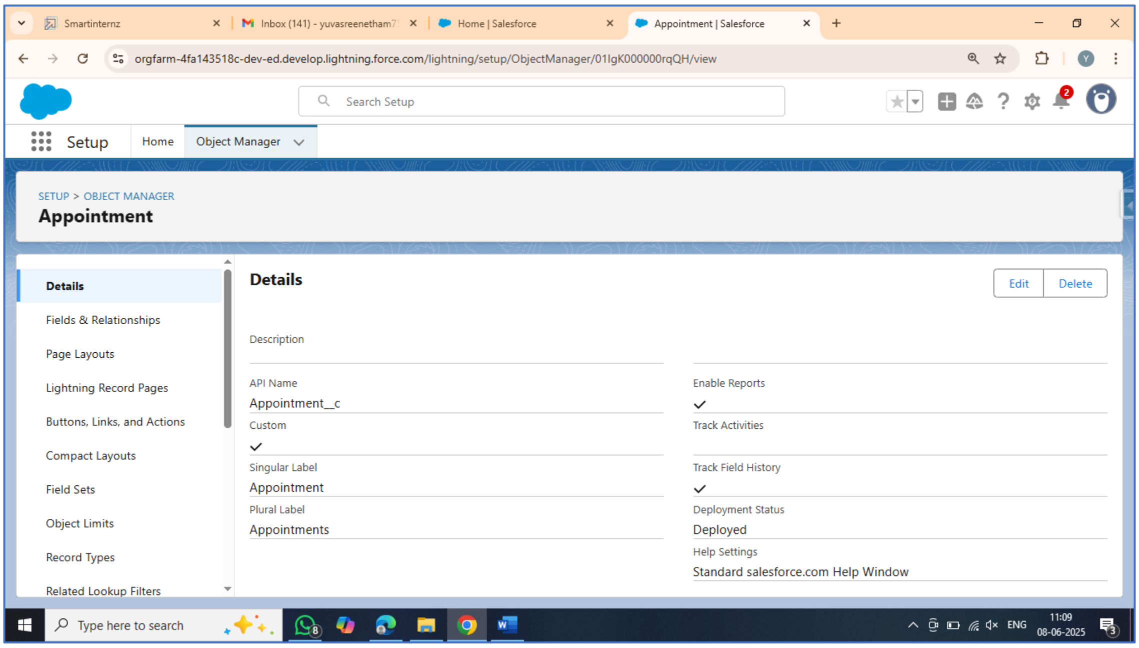
4. Click on Allow reports and Track Field History.

GARAGE MANAGEMENT SYSTEM



4. Allow search >> Save.





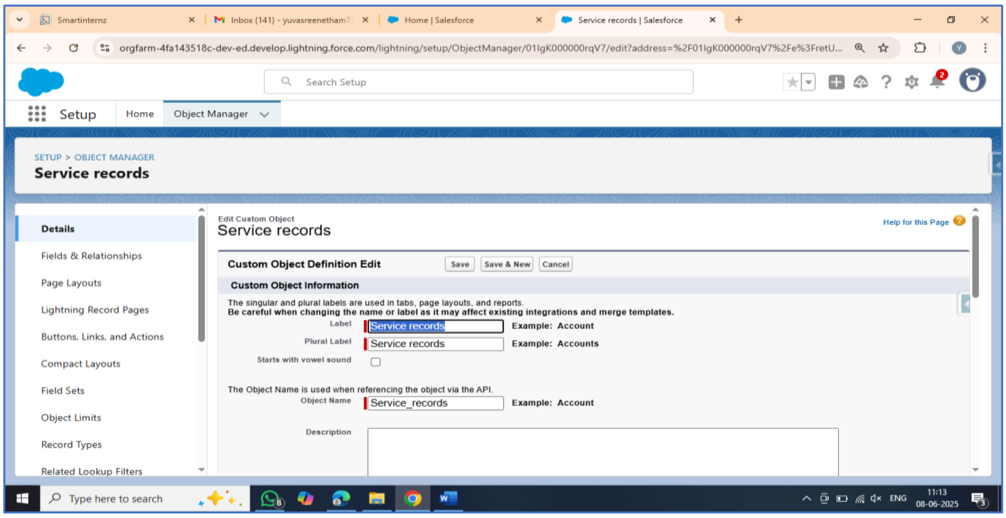
GARAGE MANAGEMENT SYSTEM

ACTIVITY -3 :- Create Service records Object

To create an object:

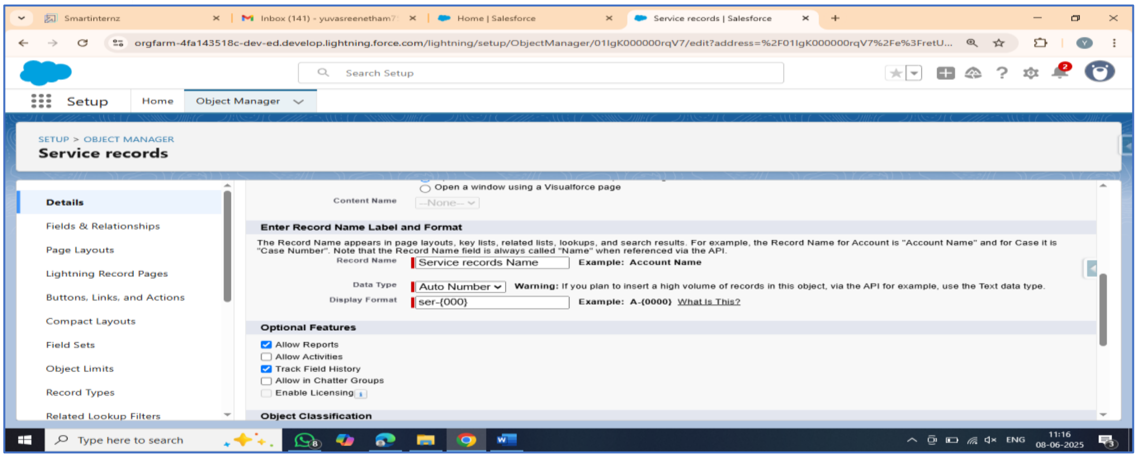
- From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.

- Enter the label name >> Service records
- Plural label name >> Service records

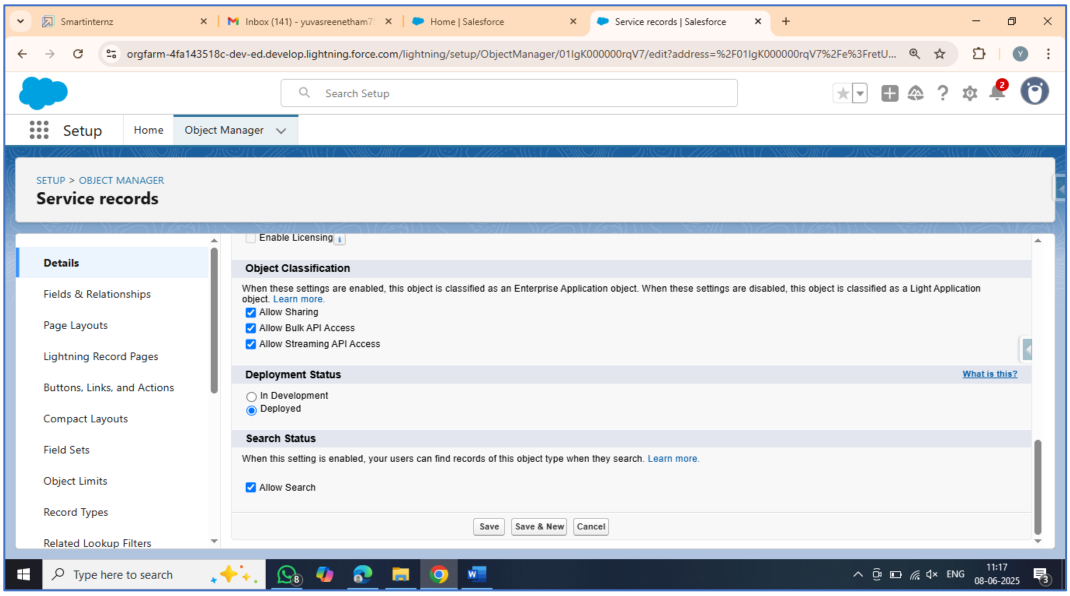


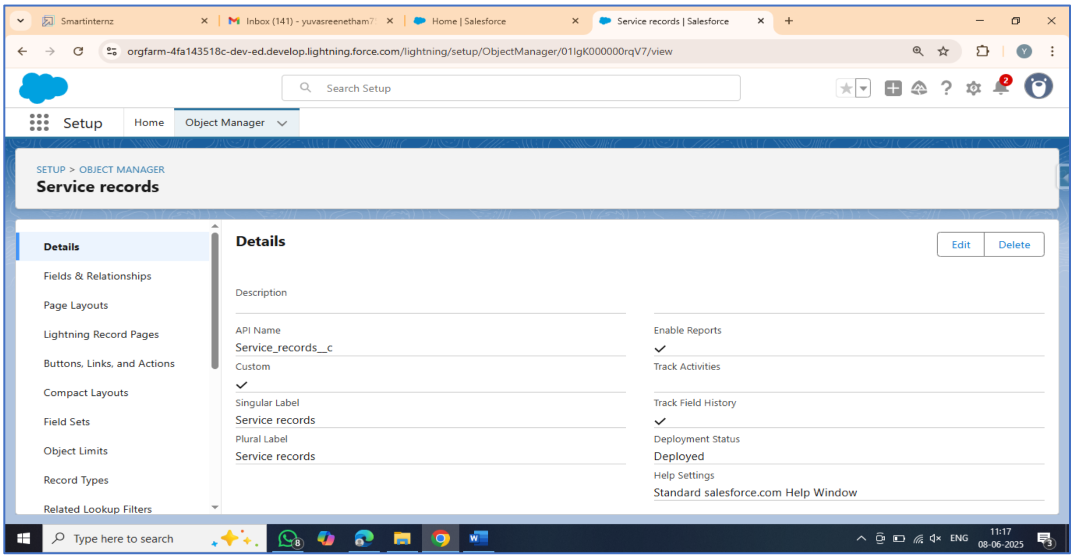
4. Enter Record Name Label and Format
   - Record Name >>Service records Name
   - Data Type >> Auto Number
   - Display Format >> ser- {000}
   - Starting number >> 1
5. Click on Allow reports and Track Field History,

GARAGE MANAGEMENT SYSTEM



6. Allow search >> Save.

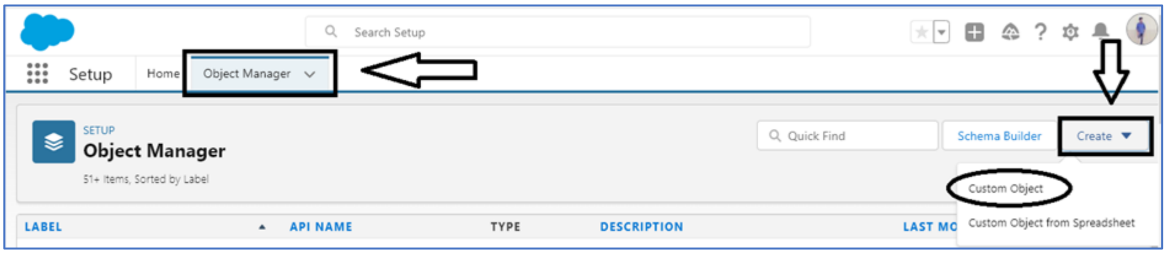




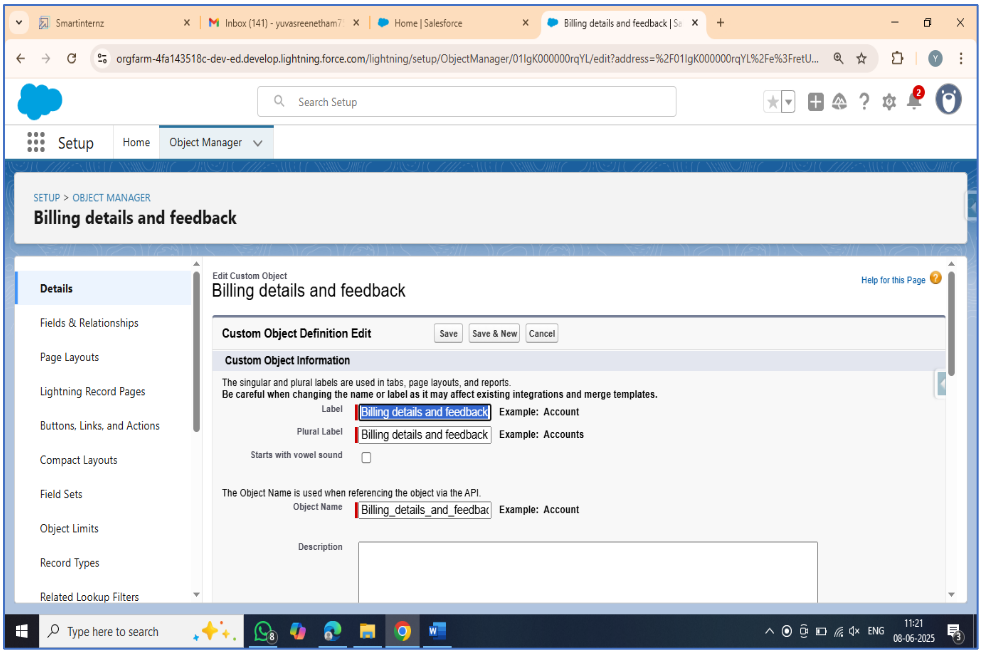
ACTIVITY – 4: Create Billing details and feedback Object

To create an object:

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



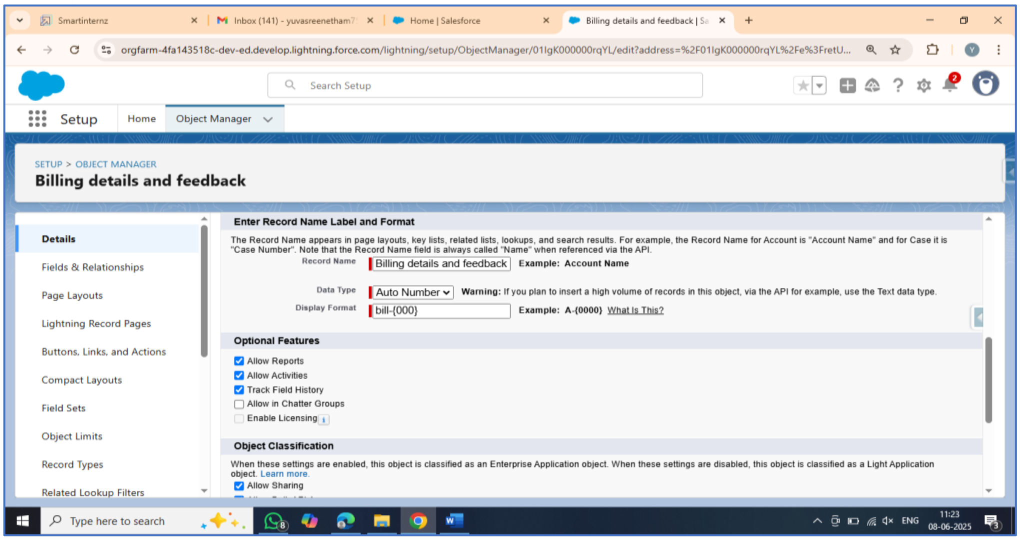
1. Enter the label name >> Billing details and feedback
2. Plural label name >> Billing details and feedback
3. Enter Record Name Label and Format



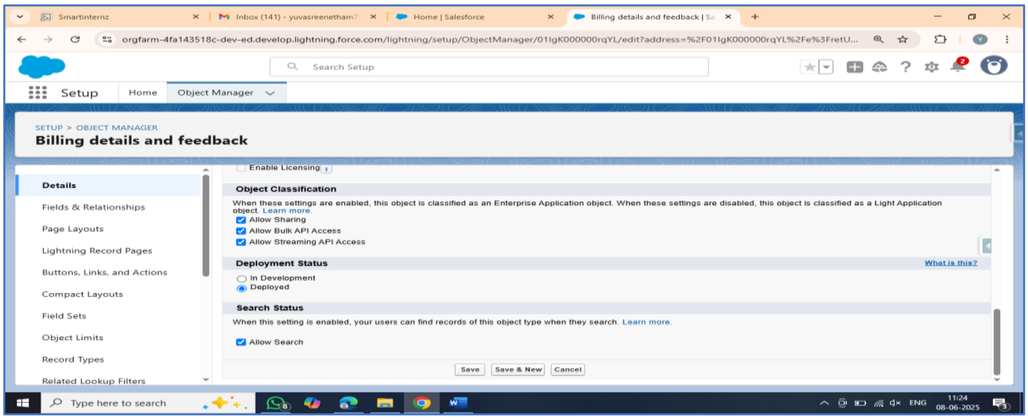
- Record Name >> Billing details and feedback Name
- Data Type >> Auto Number
- Display Format >> bill- {000}
- Starting number >> 1

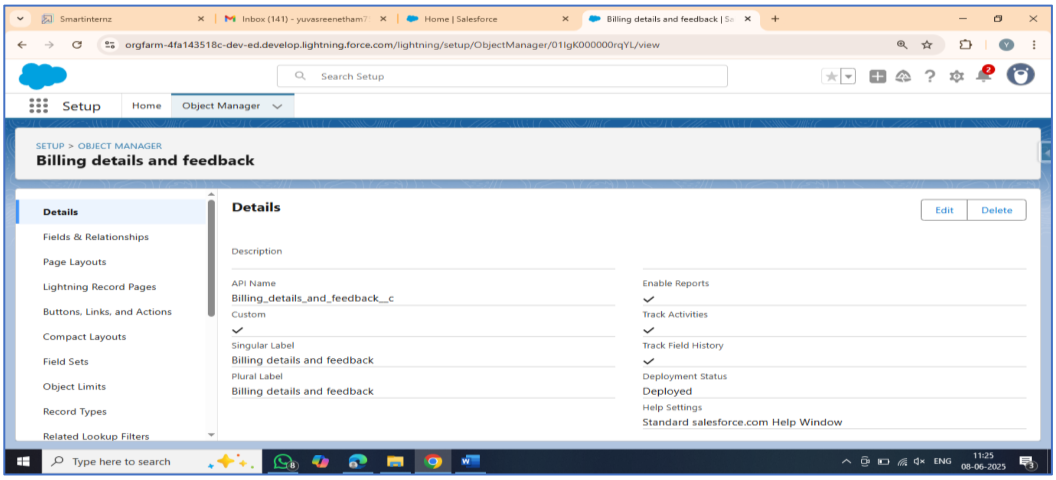
4. Click on Allow reports and Track Field History,

GARAGE MANAGEMENT SYSTEM



5. Allow search >> Save.





GARAGE MANAGEMENT SYSTEM

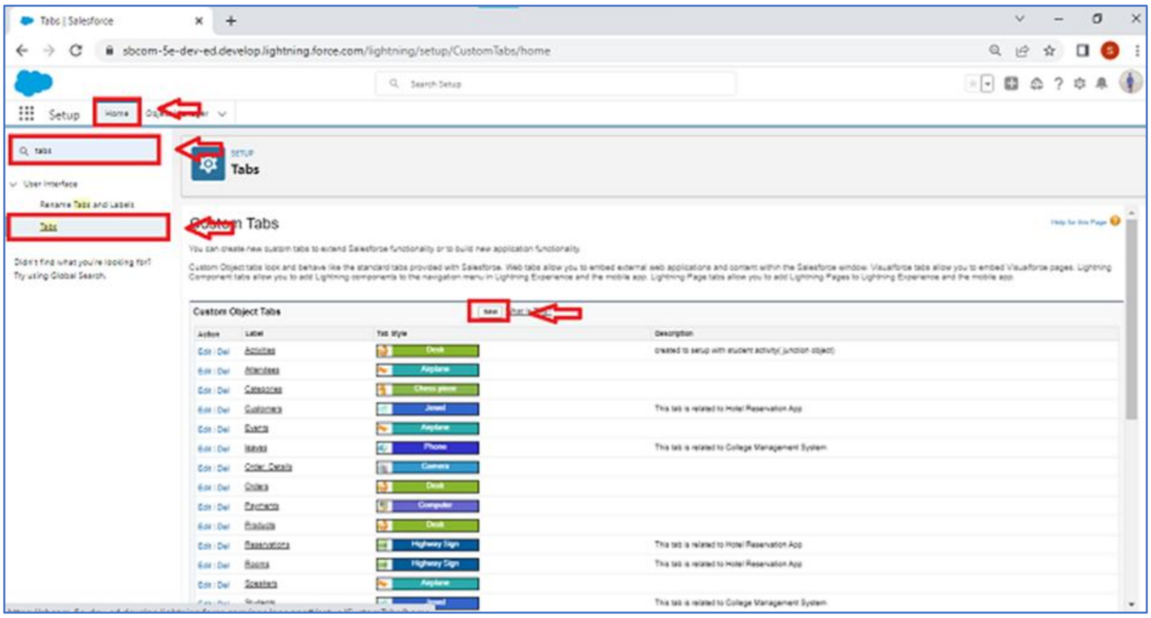
MILESTONE -3

TABS

ACTIVITY -1 :- Creating a Custom Tab

To create a Tab:(Customer Details)

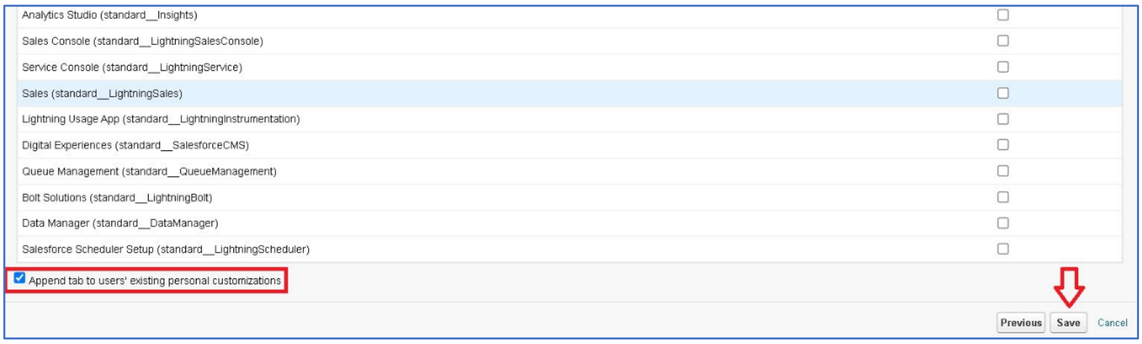
- Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)



- 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

- Make sure that the Append tab to users' existing personal customizations is checked.
- Click save.

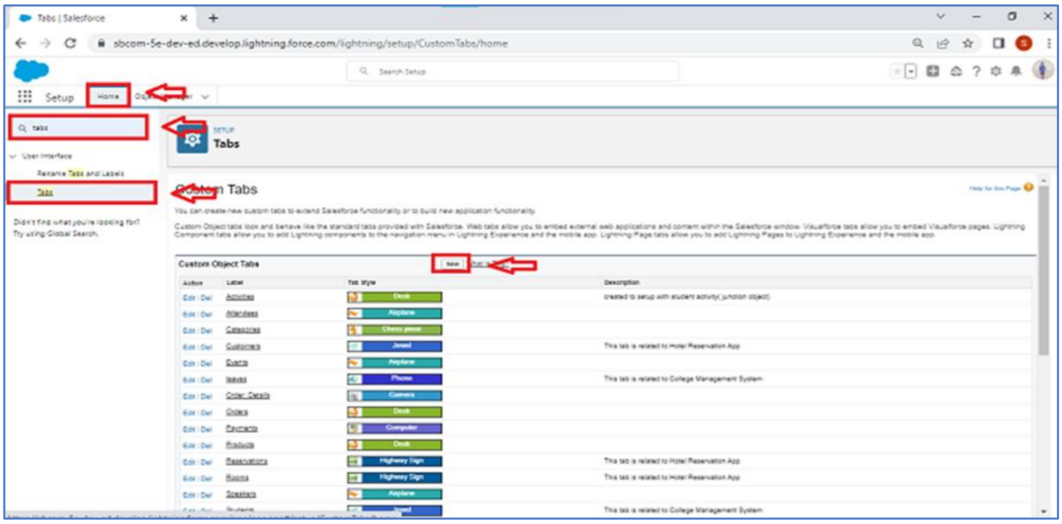

Step 3. Add to Custom Apps
Step 3 of 3
Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.
Custom App
Include Tab
Platform (standard__Platform)
Sales (standard__Sales)
Service (standard__Service)
Marketing (standard__Marketing)
Sample Console (standard__ServiceConsole)
High Volume Customer Portal User
Authenticated Website User
App Launcher (standard__AppLauncher)


Analytics Studio (standard__Insights)
Sales Console (standard__LightningSalesConsole)
Service Console (standard__LightningService)
Sales (standard__LightningSales)
Lightning Usage App (standard__LightningInstrumentation)
Digital Experiences (standard__SalesforceCMS)
Queue Management (standard__QueueManagement)
Bolt Solutions (standard__LightningBolt)
Data Manager (standard__DataManager)
Salesforce Scheduler Setup (standard__LightningScheduler)
Append tab to users' existing personal customizations
Previous
Save
Cancel

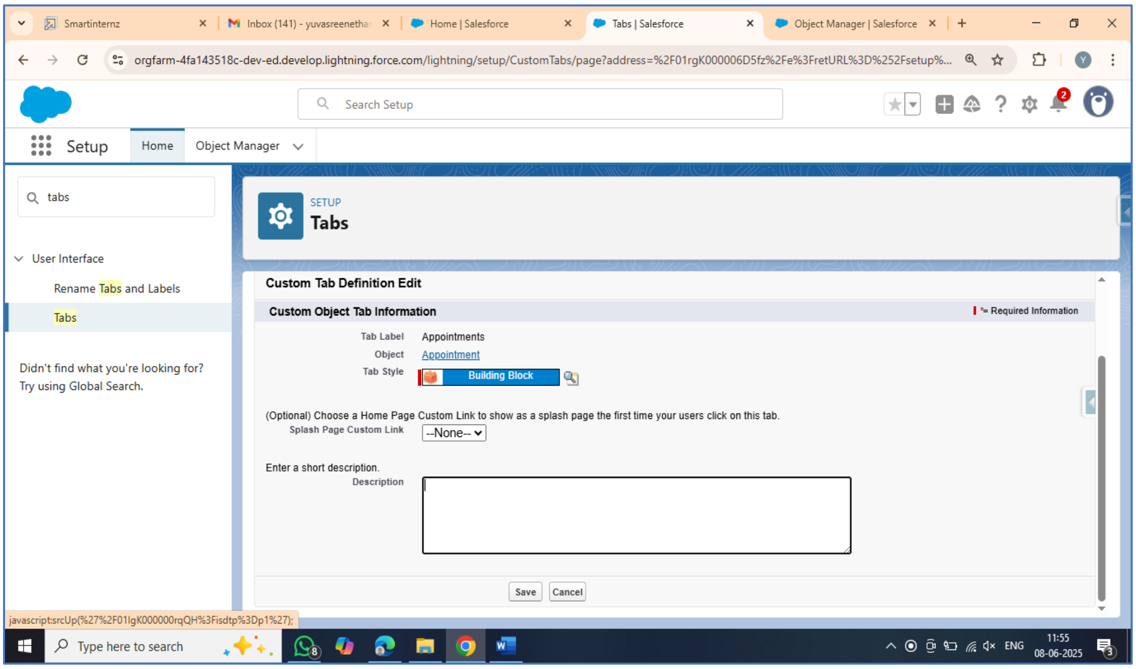
ACTIVITY – 2: Creating Remaining Tabs

To create a Tab:(Appointments)

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

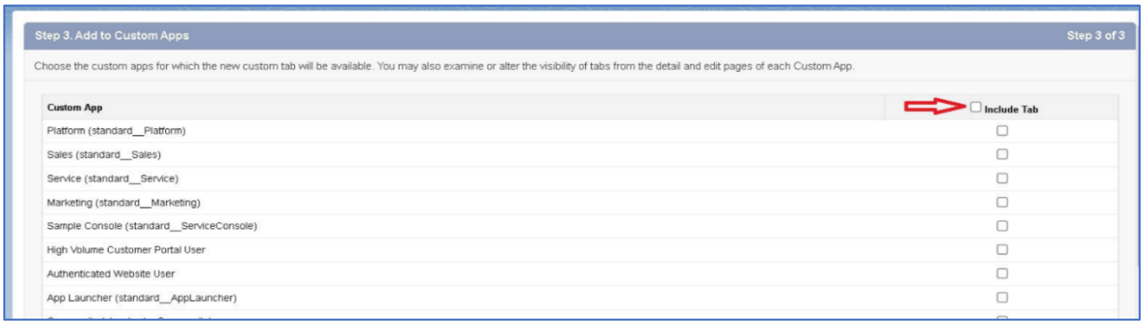


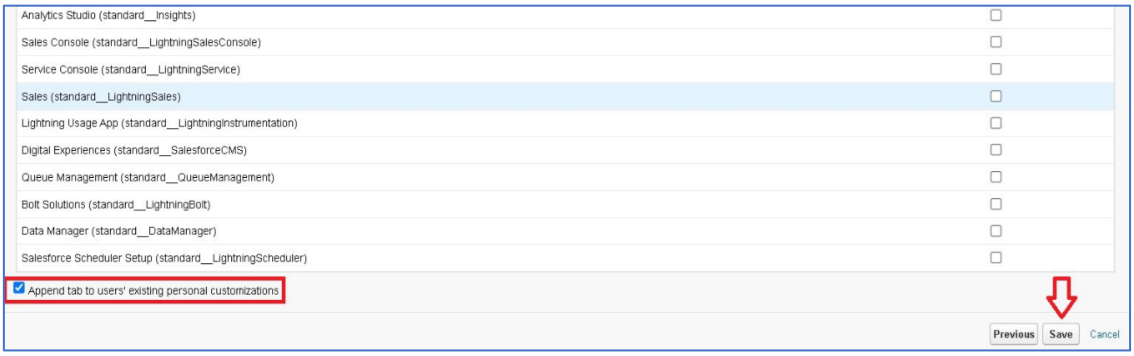
- Select Object(appointments) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab.



- Make sure that the Append tab to users' existing personal customizations is checked.
- Click save.

GARAGE MANAGEMENT SYSTEM



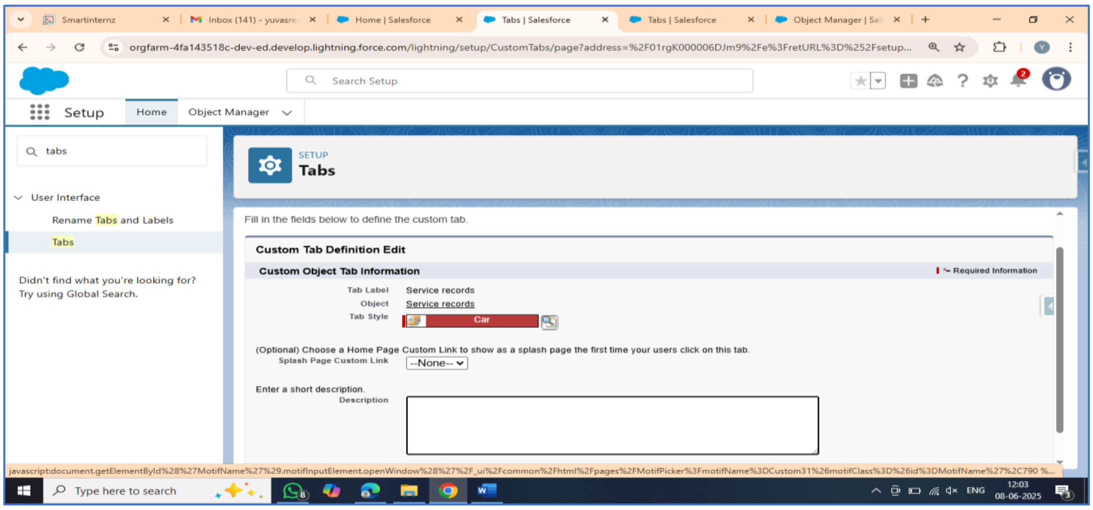


GARAGE MANAGEMENT SYSTEM

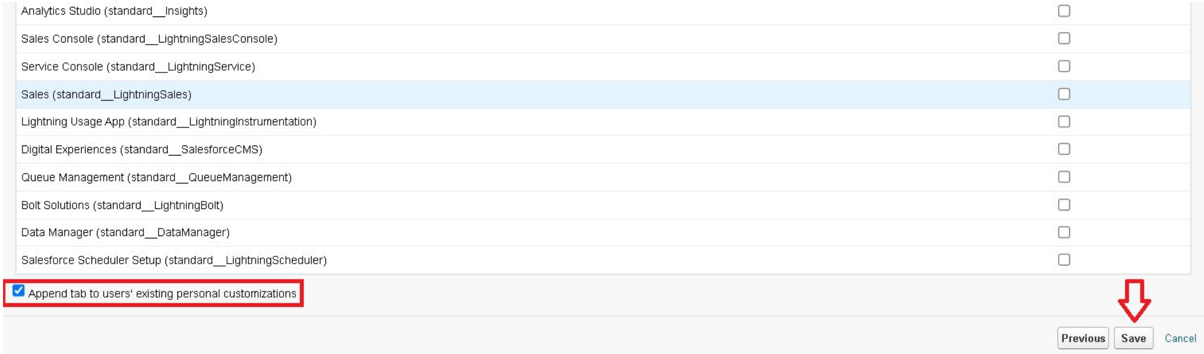
ACTIVITY -3 :- SERVICE RECORDS

To create a Tab:(Service records)

- Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
- Select Object (Service records) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab.



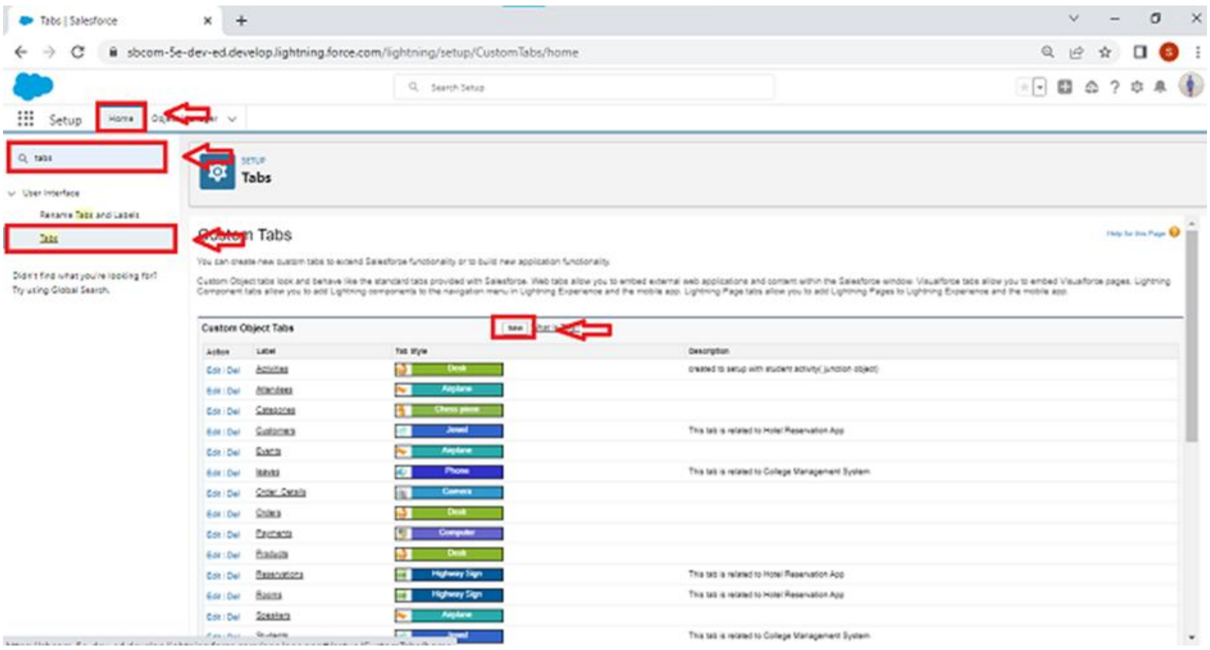
- Make sure that the Append tab to users' existing personal customizations is checked.
- Click save.



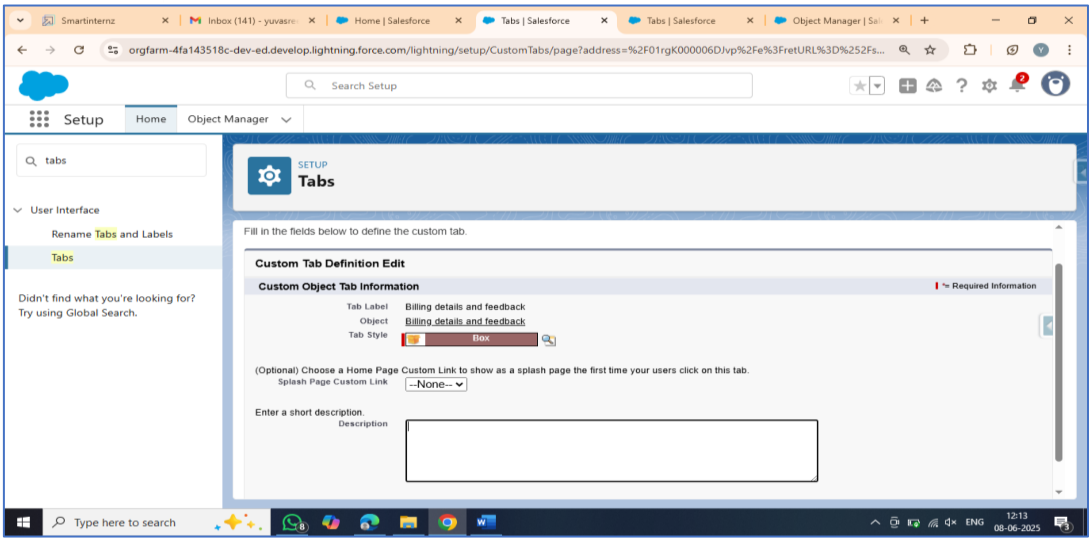
ACTIVITY – 4:- BILLING DETAILS AND FEEDBACK

To create a Tab:(Billing details feedback)

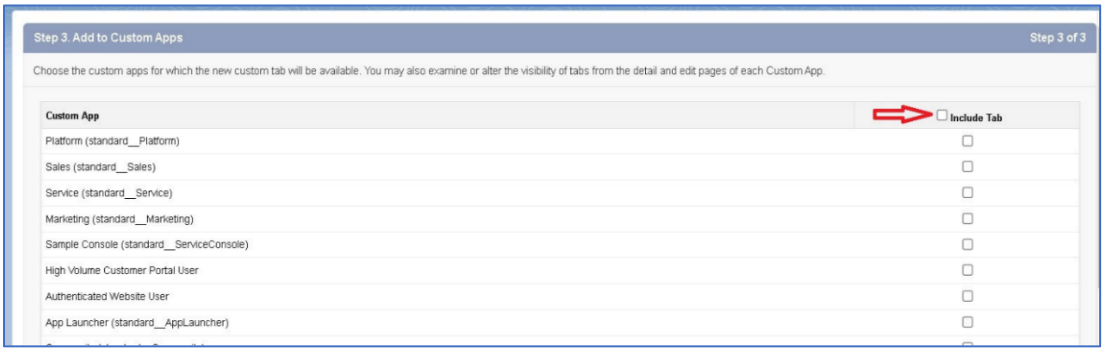
- Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)

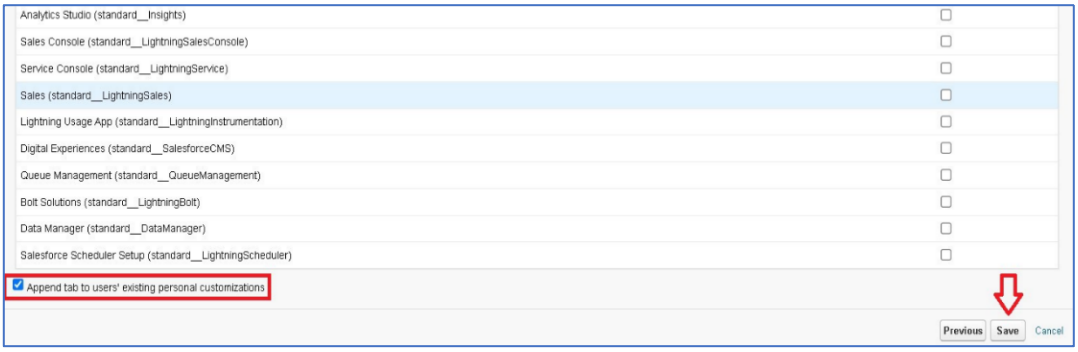


- Select Object (Billing details feedback) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab.

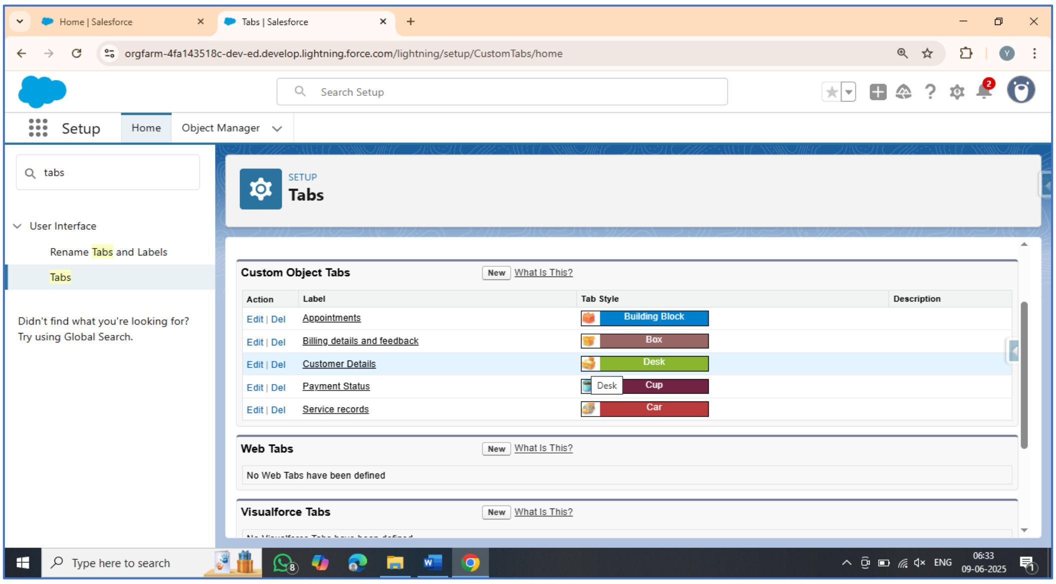


- Make sure that the Append tab to users' existing personal customizations is checked.
- Click save.





GARAGE MANAGEMENT SYSTEM



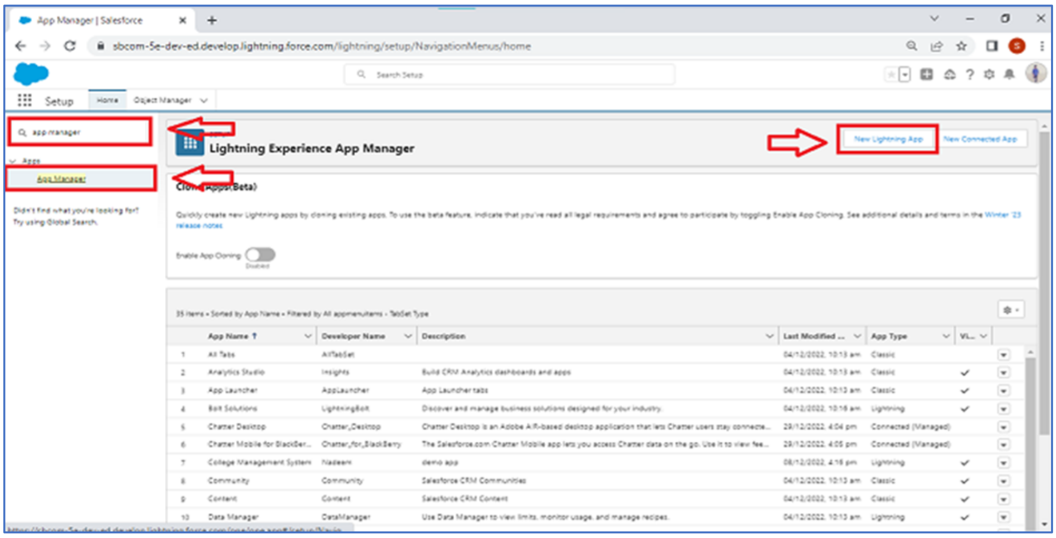
GARAGE MANAGEMENT SYSTEM

MILESTONE – 4
THE LIGHTNING APP

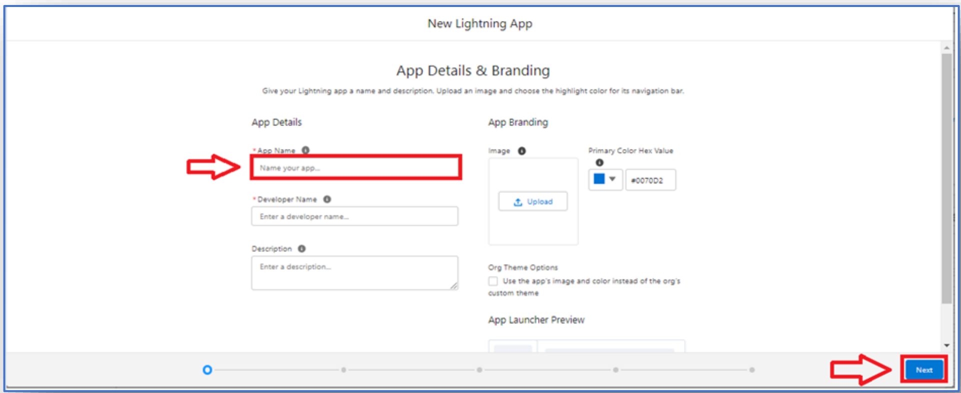
ACTIVITY – 1:- Create a Lightning App

➢ **To create a lightning app page:**

- Go to setup page >> search "app manager" in quick find >> select "app manager" >> click on new lightning App.

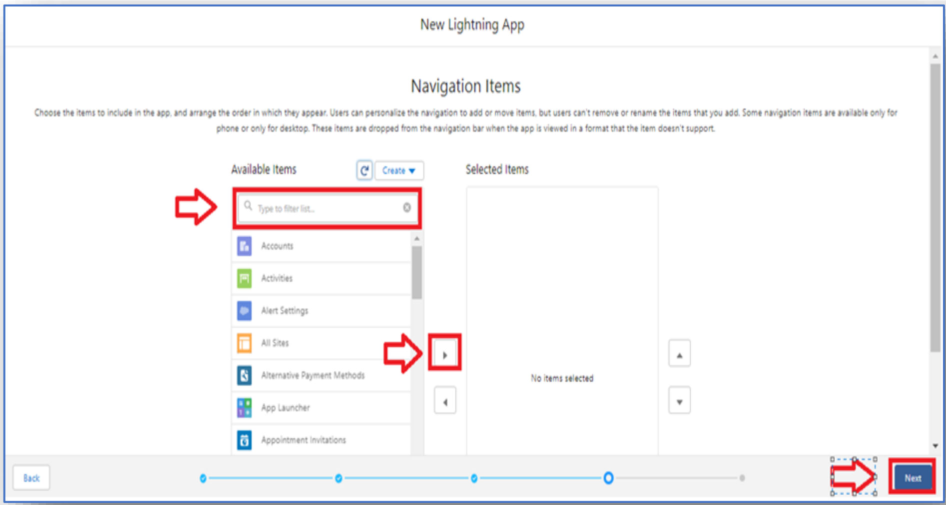


- Fill the app name in app details as Garage Management Application >> Next >> (App option page) keep it as default >> Next >> (Utility Items) keep it as default >> Next.



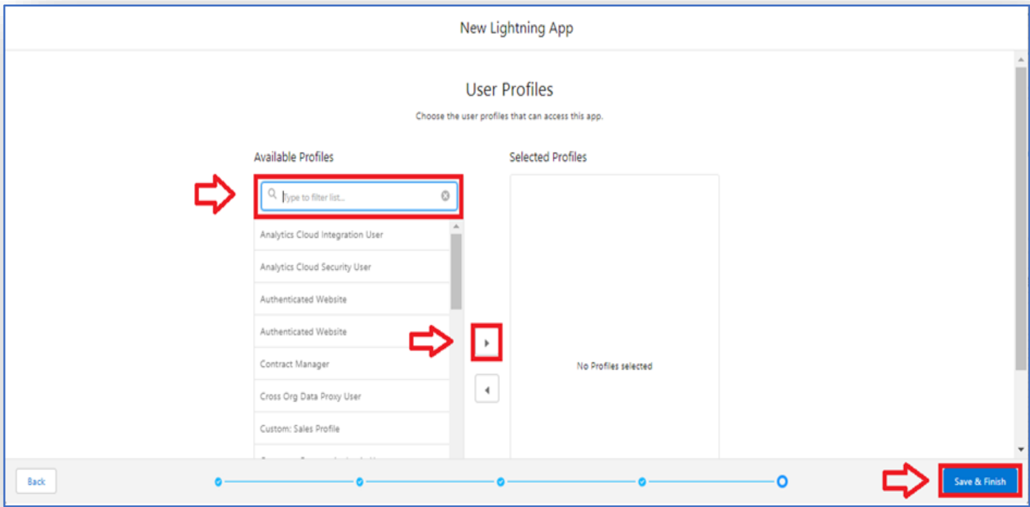
To Add Navigation Items:

- 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.



GARAGE MANAGEMENT SYSTEM

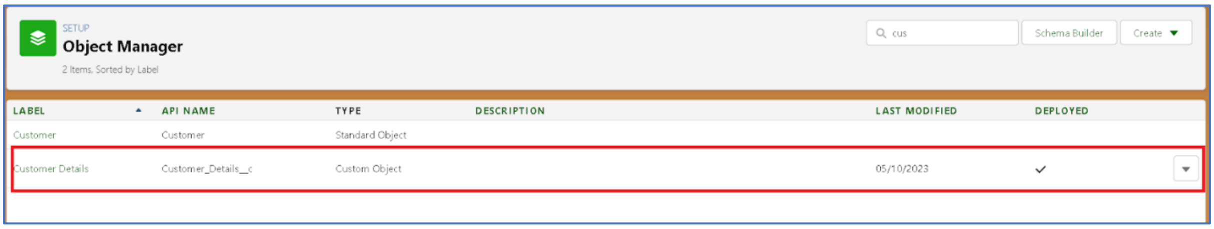
MILESTONE – 5

FIELDS

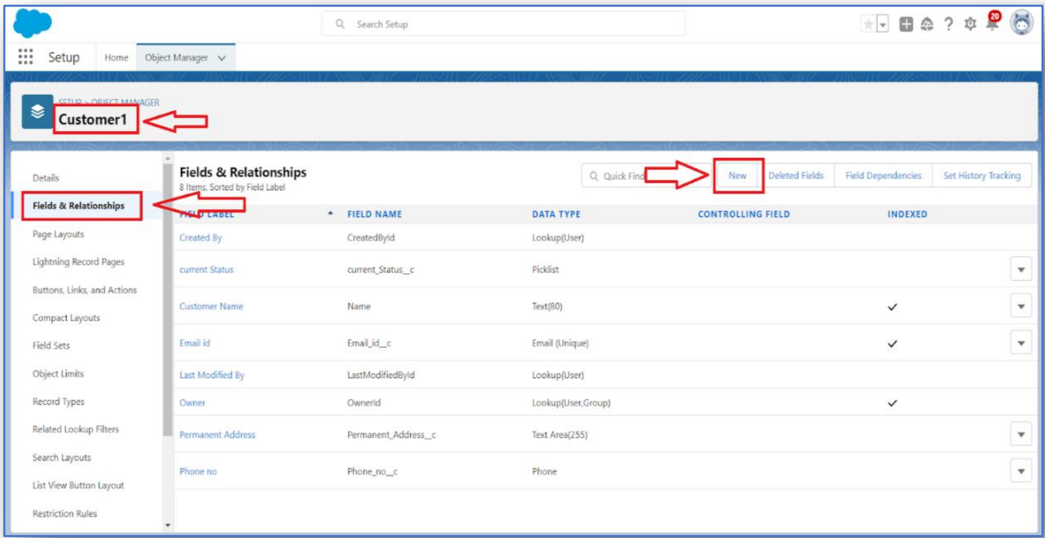
ACTIVITY -1 : Creation of fields for the Customer Details object

1. To create fields in an object:

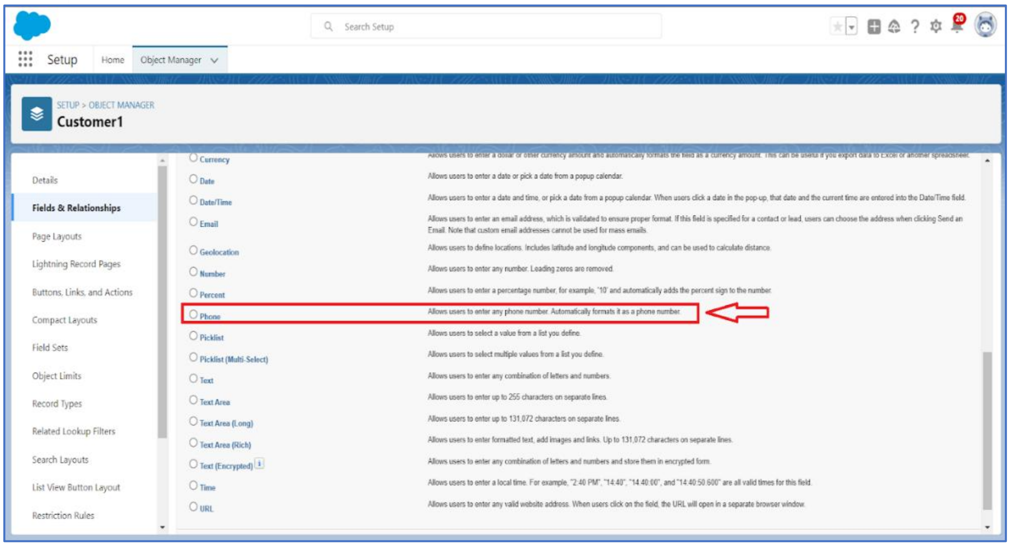
- Go to setup >> click on Object Manager >> type object name (Customer Details) in search bar >> click on the object.



- Now click on "Fields & Relationships" >> New



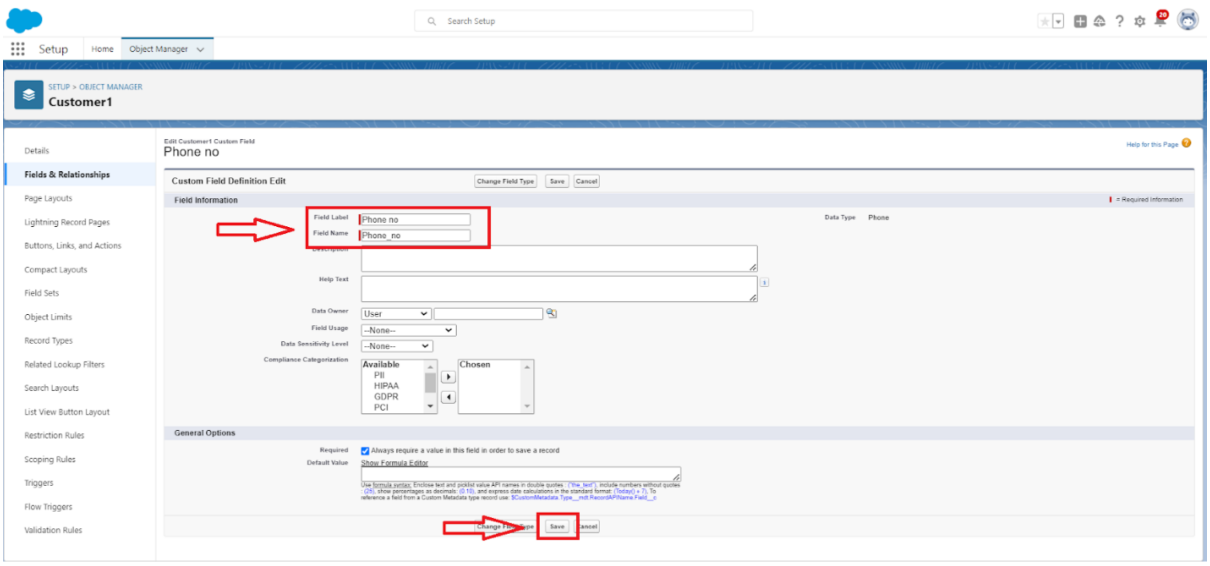
- Select Data Type as a "Phone"



➢ Click on next.

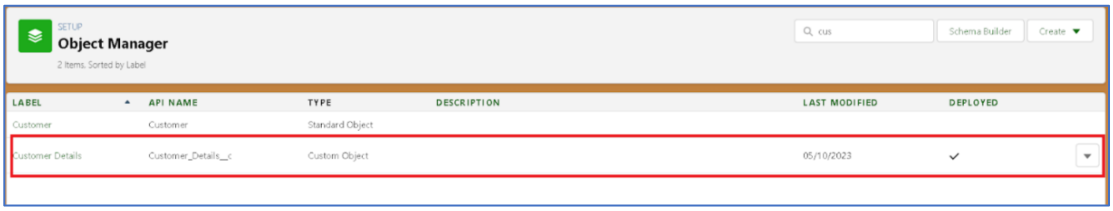
➢ Fill the Above as following:

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

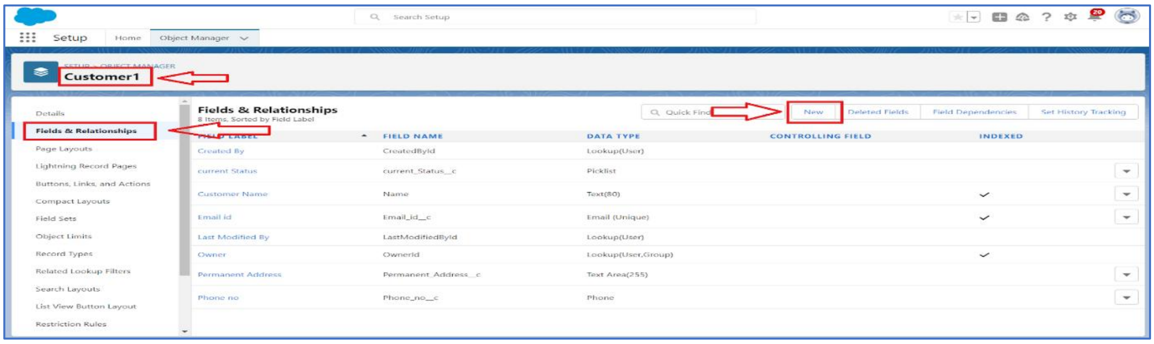


2. To create other fields in an object:

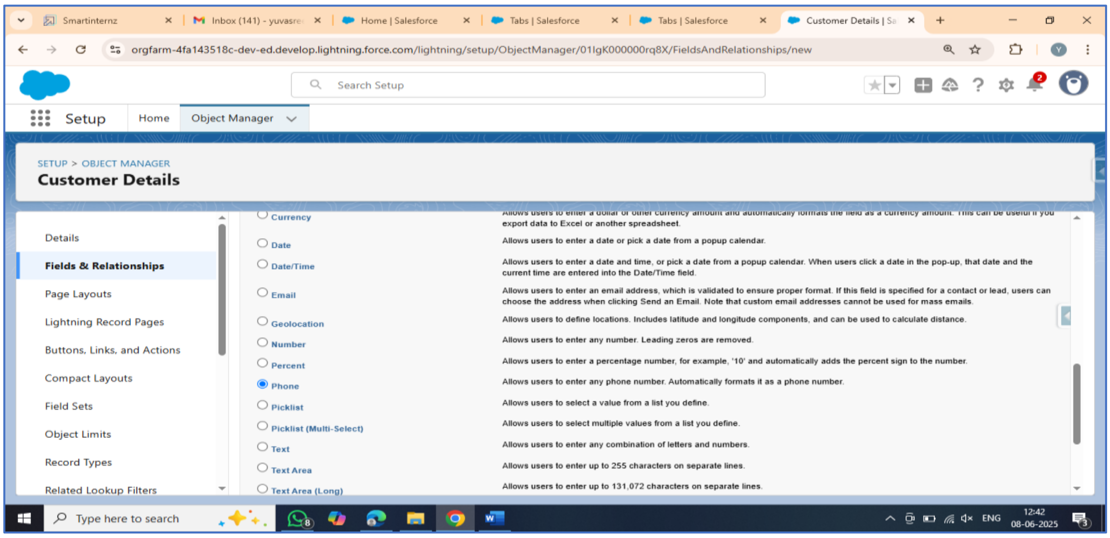
- Go to setup >> click on Object Manager >> type object name(Customer Details) in search bar >> click on the object.



- Now click on “Fields & Relationships” >> New



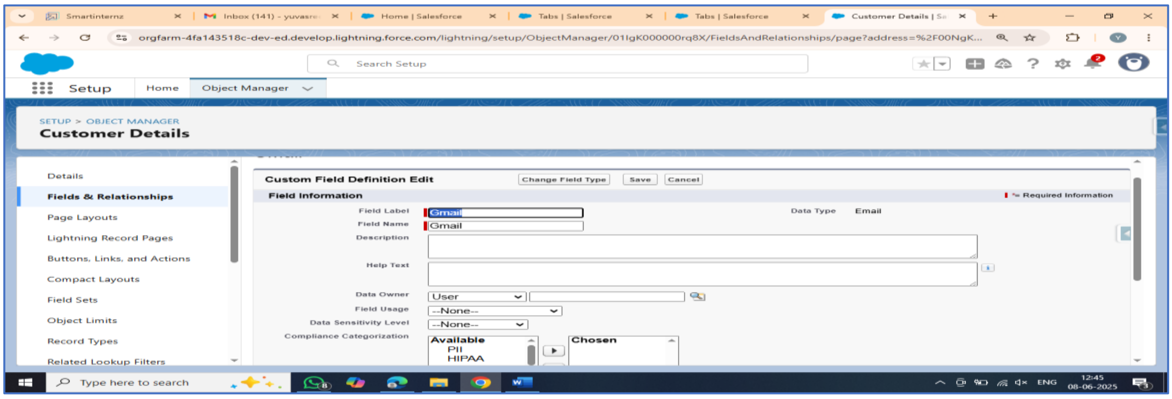
- Select Data Type as a “Email”

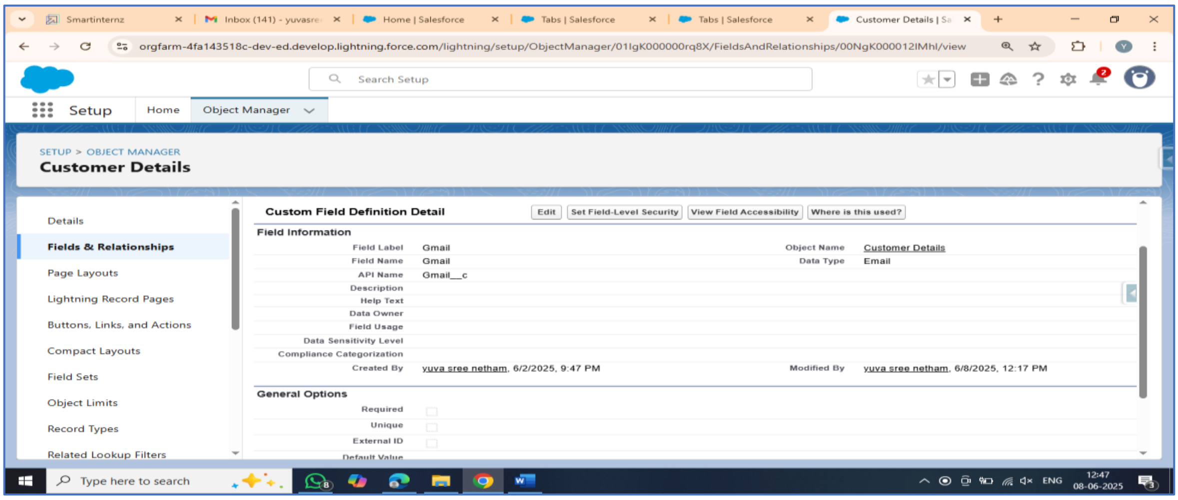


- Click Next
- Fill the Above as following:
- Field Label: Gmail

GARAGE MANAGEMENT SYSTEM

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

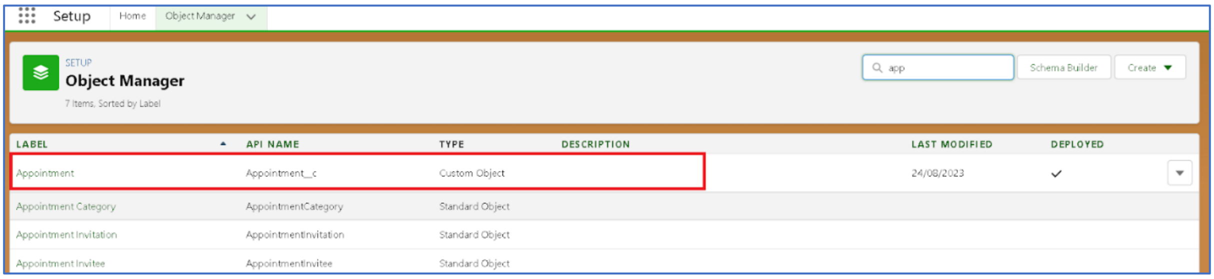




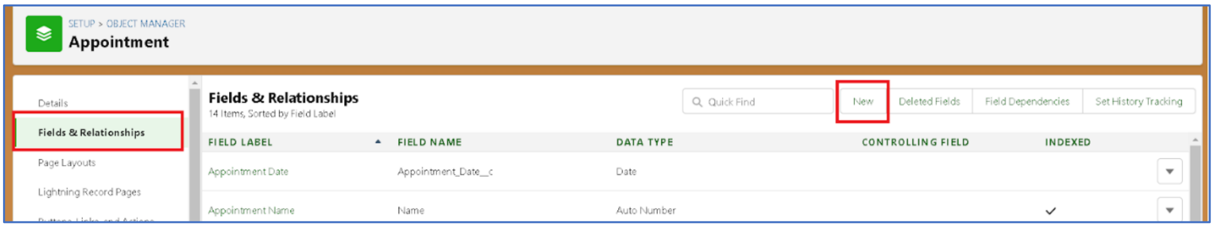
ACTIVITY – 2:- Creation of Lookup Fields

Creation of Lookup Field on Appointment Object:

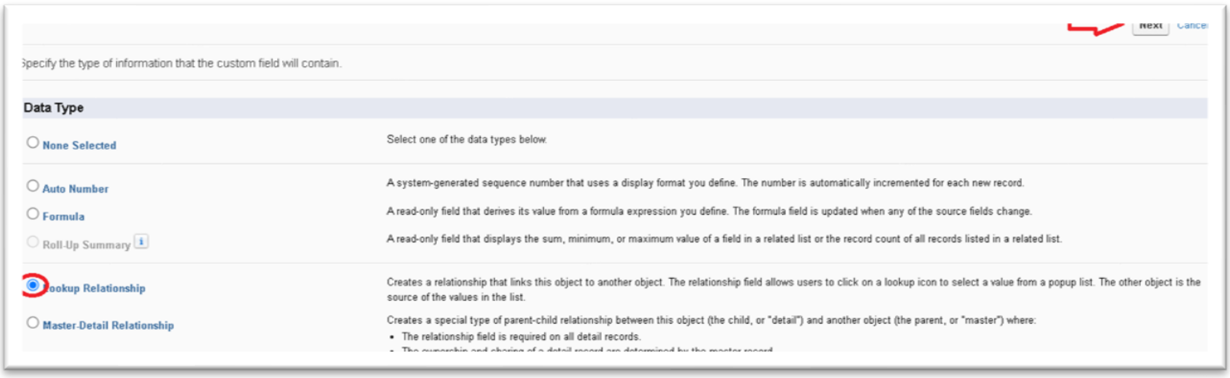
- Go to setup >> click on Object Manager >> type object name (Appointment) in the search bar >> click on the object.



- Now click on “Fields & Relationships” >> New



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

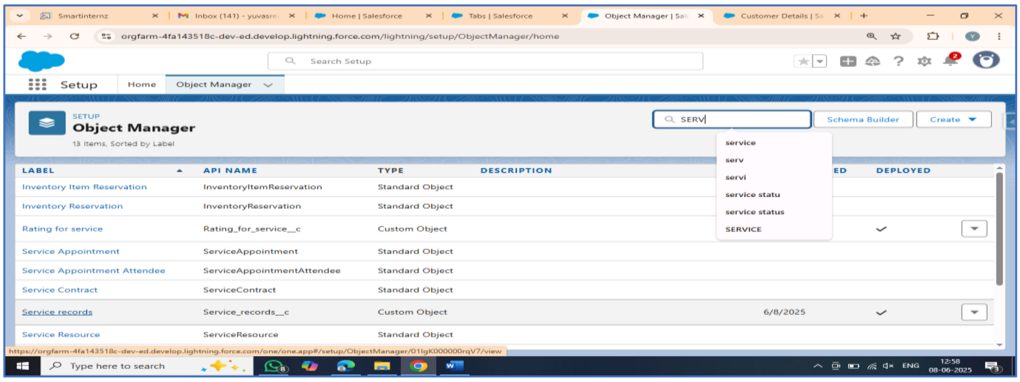


- Select the related object “Customer Details” and click next.
- Next >> Next >> Save

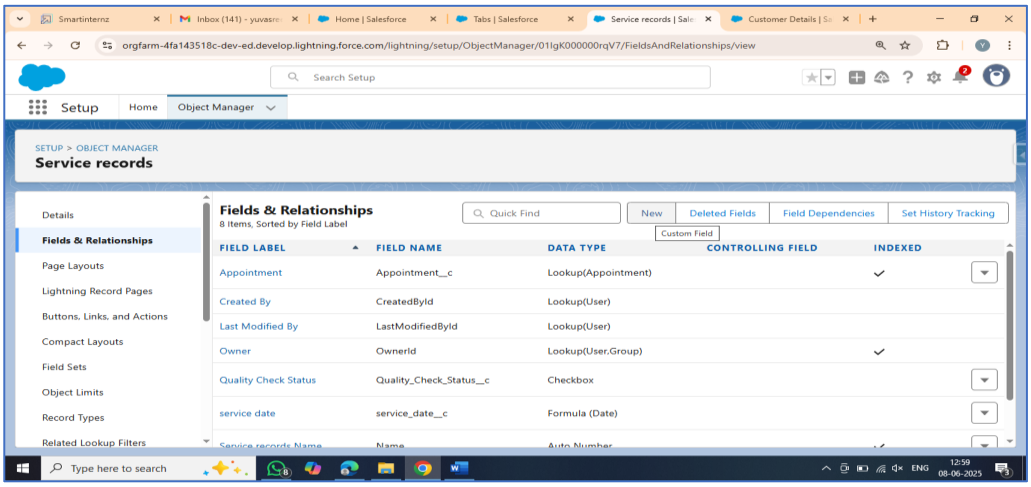
GARAGE MANAGEMENT SYSTEM

➢ Creation of Lookup Field on Service records Object:

- Go to setup >> click on Object Manager >> type object name (Service records) in search bar >> click on the object.

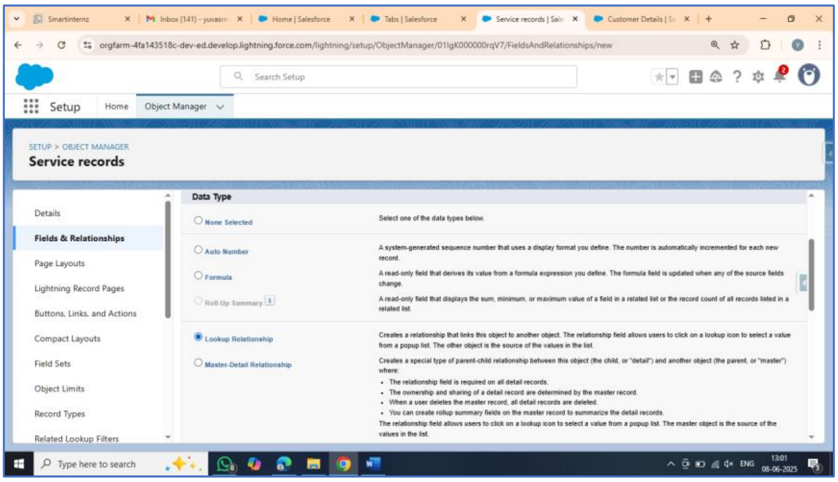


- Now click on "Fields & Relationships" >> New

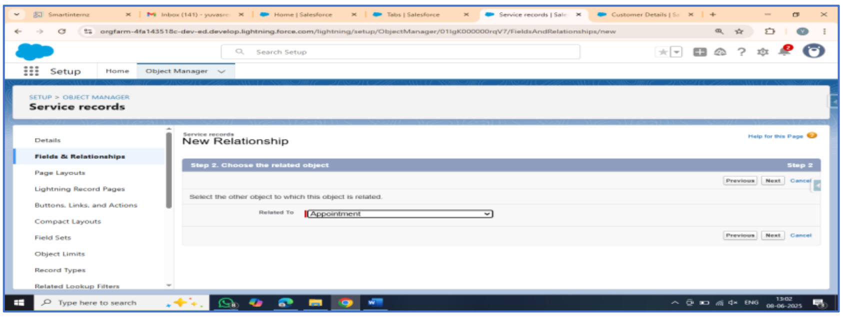


- Select "Look-up relationship" as data type and click Next.

GARAGE MANAGEMENT SYSTEM



- Select the related object “Appointment” and click next.



- Make it a required field so click on Required.

- Scroll down for Lookup Filter and click on Show filter settings.

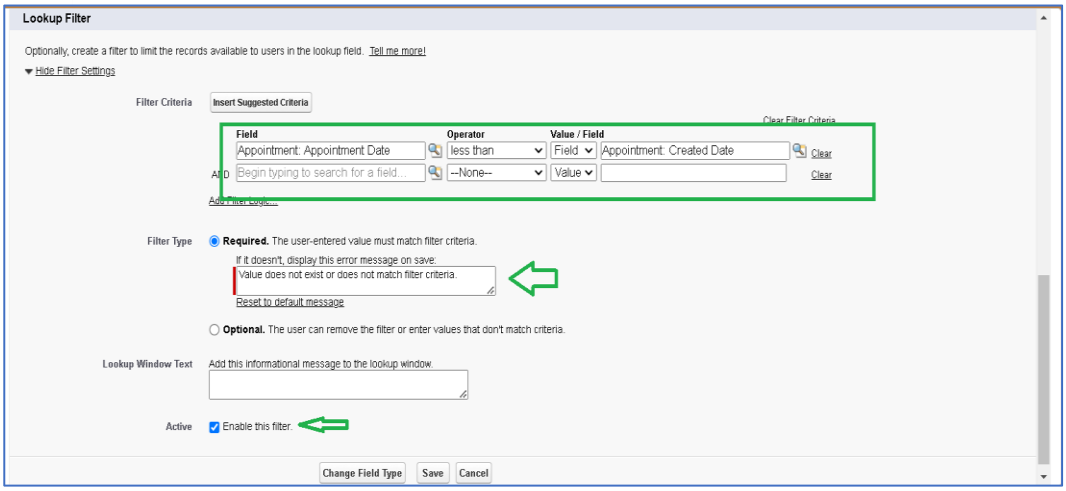
- Now add the filter criteria.

- Field: Appointment: Appointment Date >> Operator: less than >> select field >> Appointment: Created Date

- Filter type should be Required**.**
- Error Message: Value does not match the criteria.

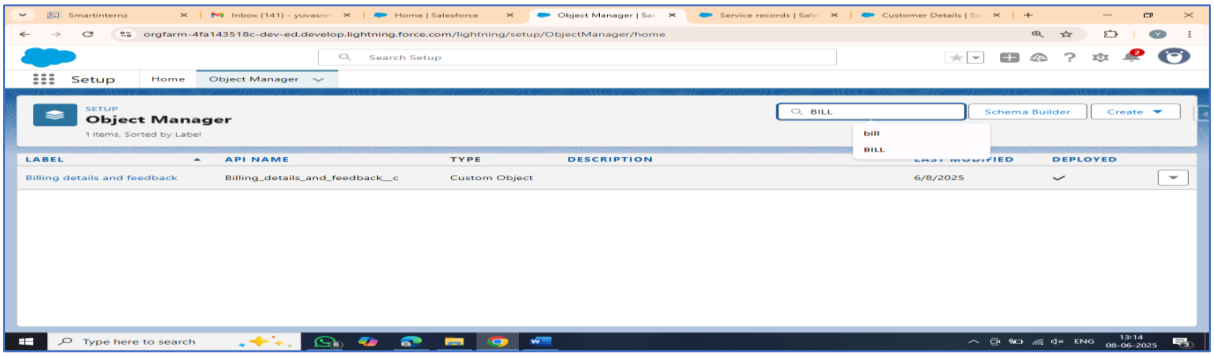
- Enable the filter by click on Active.

- Next >> Next >> Save.

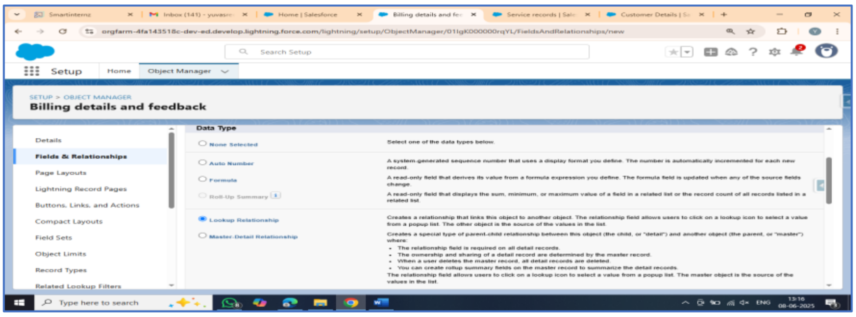


Creation of Lookup Field on Billing details and feedback Object:

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



- Now click on “Fields & Relationships” >> New.
- Select “Look-up relationship” as data type and click Next.



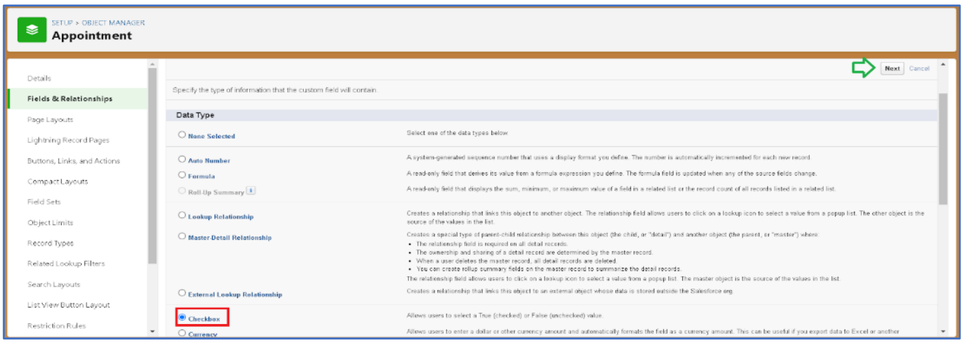
- Select the related object “Service records” and click next.
- Next >> Next >> Save & new.

GARAGE MANAGEMENT SYSTEM

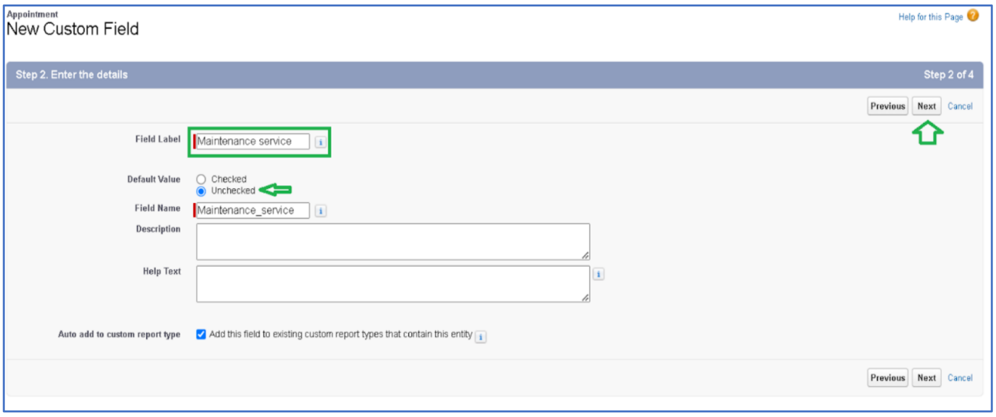
ACTIVITY -3 : Creation of Checkbox Fields

Creation of Checkbox Field on Appointment Object:

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



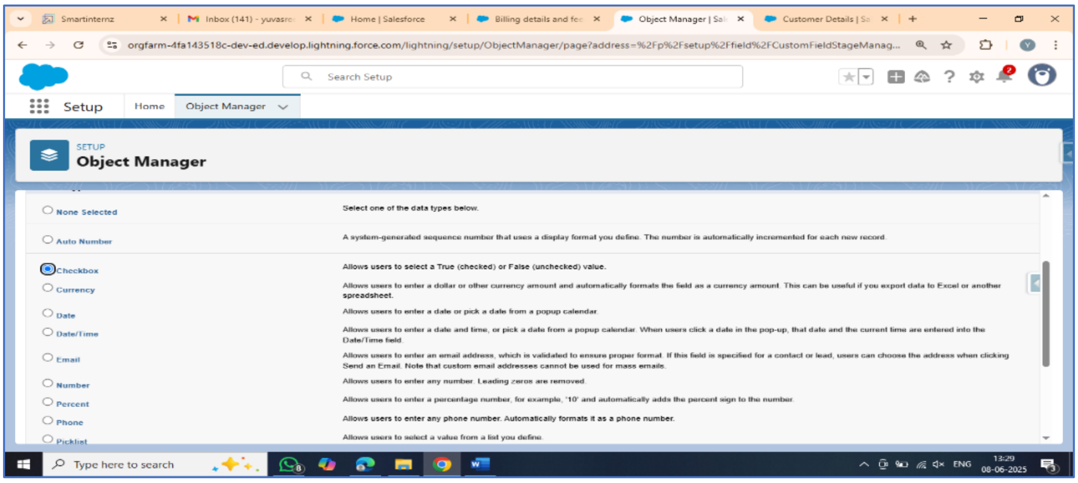
- Give the Field Label: Maintenance service
- Field Name: is auto populated
- Default value: unchecked



- Click on next >> next >> save.

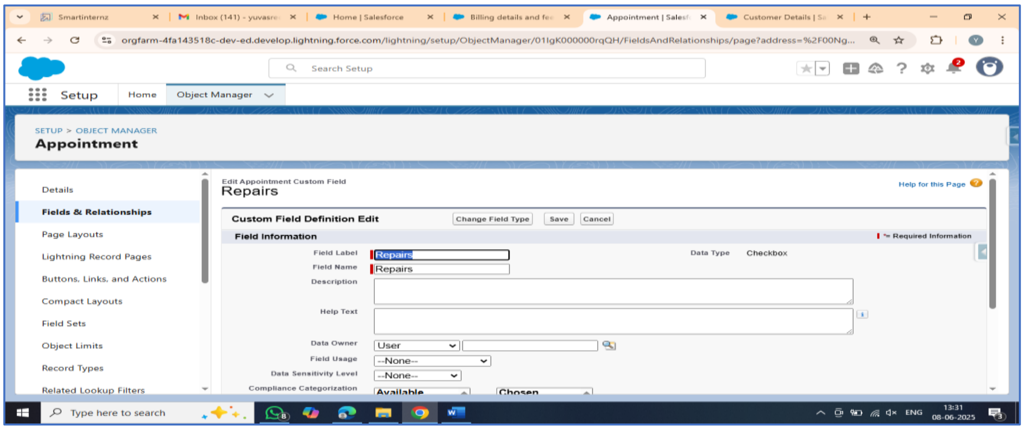
Creation of Another Checkbox Field on Appointment Object :

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

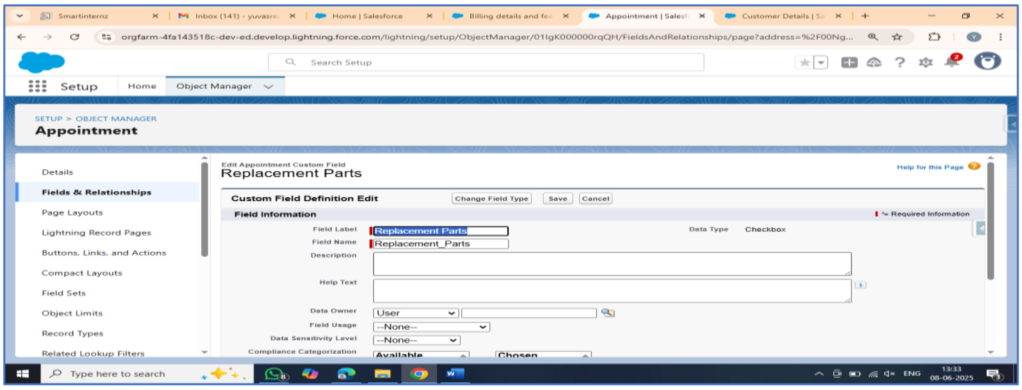


=

- Give the Field Label: Repairs
- Field Name: is auto populated
- Default value: unchecked



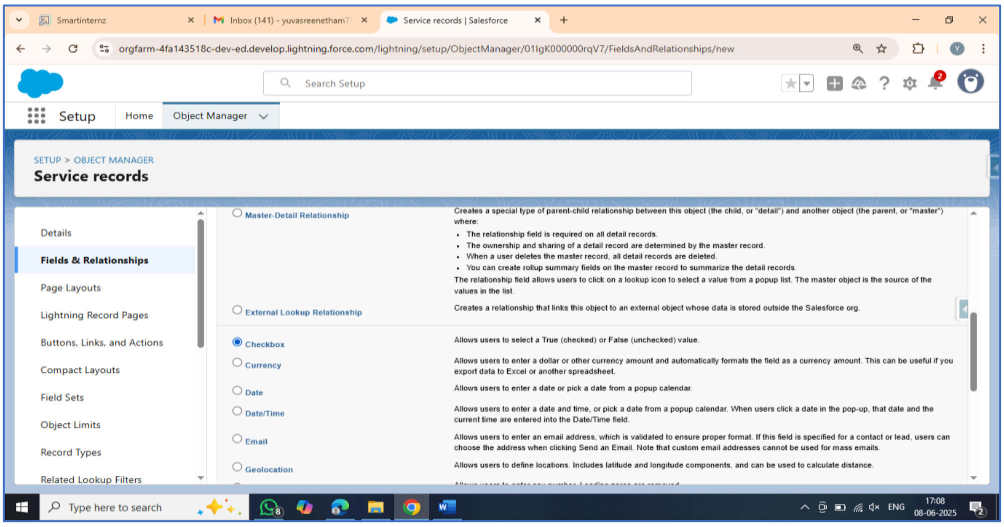
- Click on next >> next >> save.
- Follow the same and create another checkbox with given names
- Give the Field Label : Replacement Parts
- Field Name: is auto populated



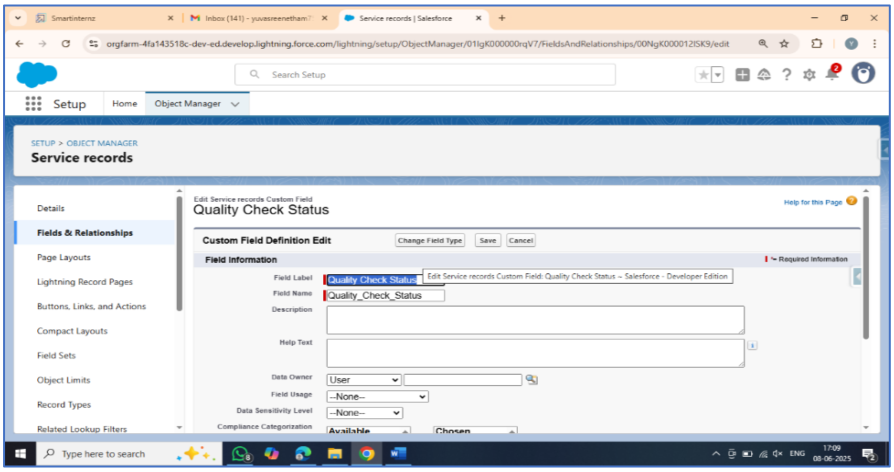
- Default value: unchecked
- Click on next >> next >> save.

Creation of Checkbox Field on Service records Object :

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



- Give the Field Label: Quality Check Status
- Field Name : is auto populated
- Default value : uncheck

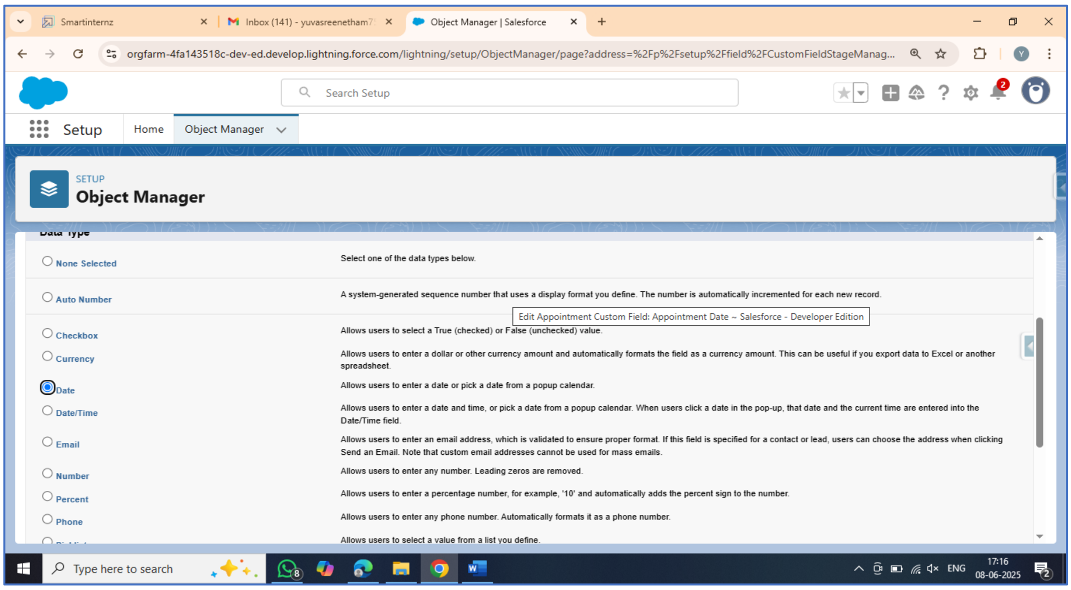


- Click on next >> next >> save.

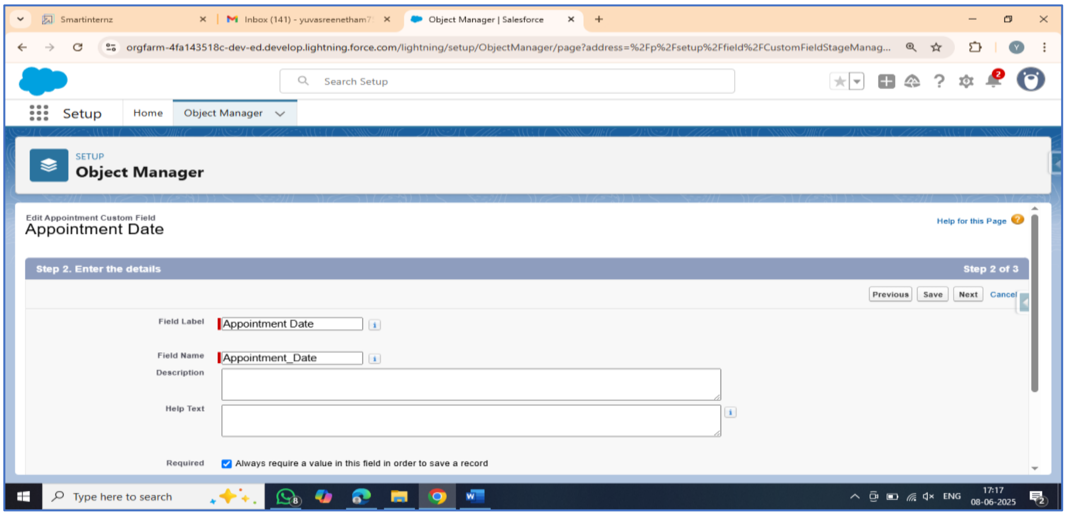
ACTIVITY – 4 : Creation of date Fields

Creation of Date Field on Appointment Object:

- Go to setup >> click on Object Manager >> type object name (Appointment) in the search bar >> click on the object.
- Now click on "Fields & Relationships" >> New.
- Select "Date" as data type and click Next.



- Give the Field Label: Appointment Date
- Field Name : is auto populated

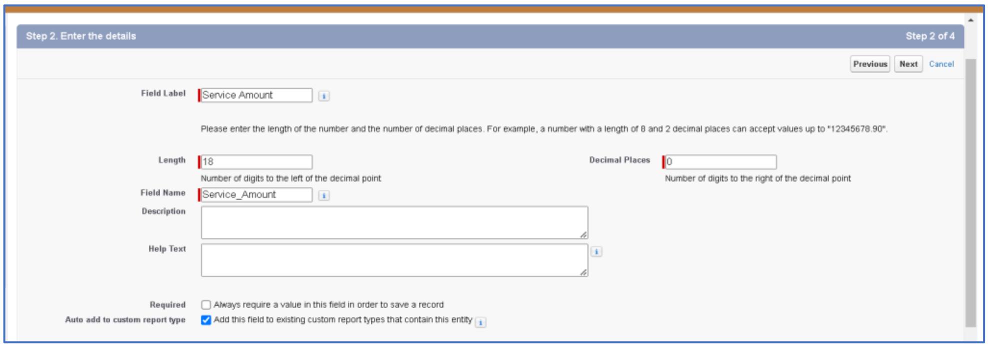


- Make it as a Required field by click on the Required option.
- Click on next >> next >> save.

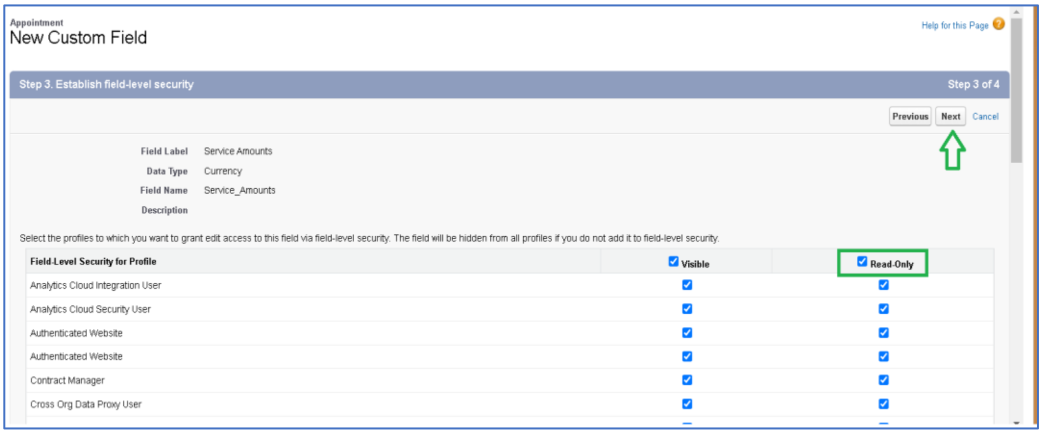
ACTIVITY – 5 :- Creation of Currency Fields

Creation of Currency Field on Appointment Object :

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



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

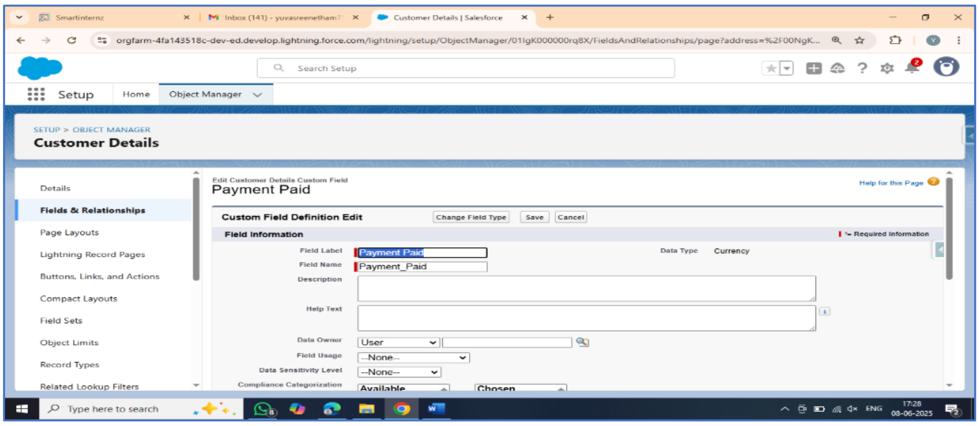


- Click on next > > save.

GARAGE MANAGEMENT SYSTEM

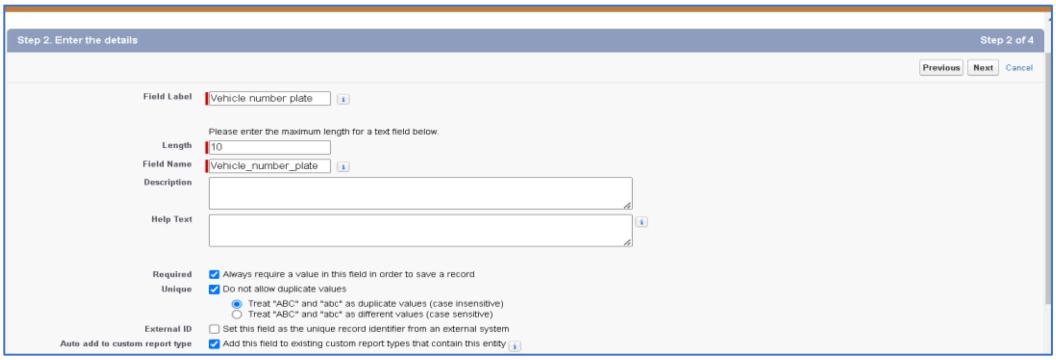
Creation of Currency Field on Billing details and feedback Object :

- Go to setup >> click on Object Manager >> type object name(Appointment) in the search bar >> click on the object.
- Now click on “Fields & Relationships” >> New.
- Change the label name as mentioned.
- Give the Field Label : Payment Paid
- Field name : is auto populated



ACTIVITY – 6 :- Creation of Text Fields

- Go to setup >> click on Object Manager >> type object name(Appointment) in the search bar >> click on the object.
- Now click on “Fields & Relationships” >> New.
- Select “Text” as data type and click Next.
- Give the Field Label : Vehicle number plate

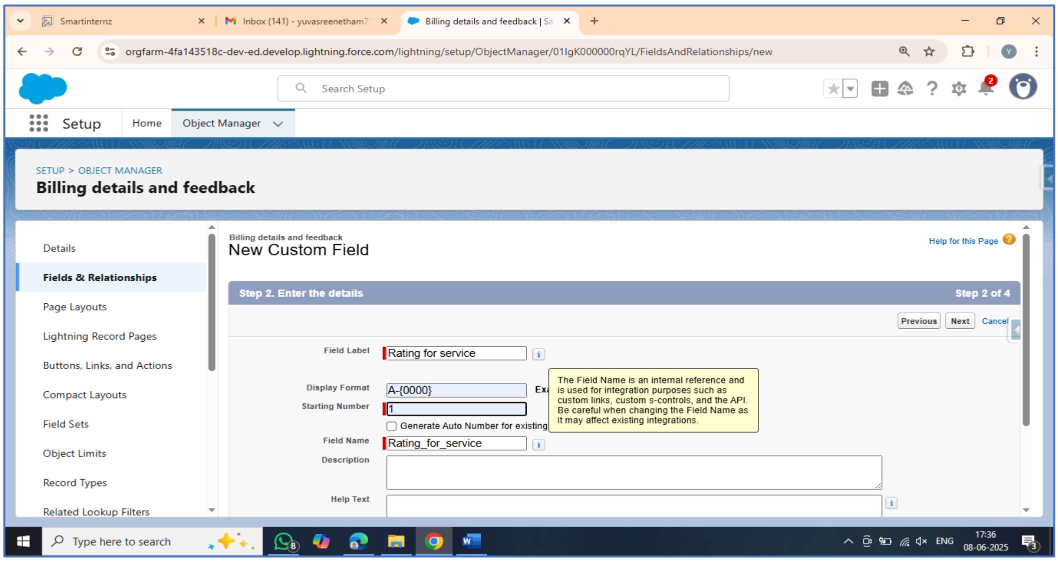


- Field Name : is auto populated
- Length : 10
- Make field as Required and Unique.
- Click on next >> next >> save.

Creation of Text Fields in Billing details and feedback object :

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

GARAGE MANAGEMENT SYSTEM

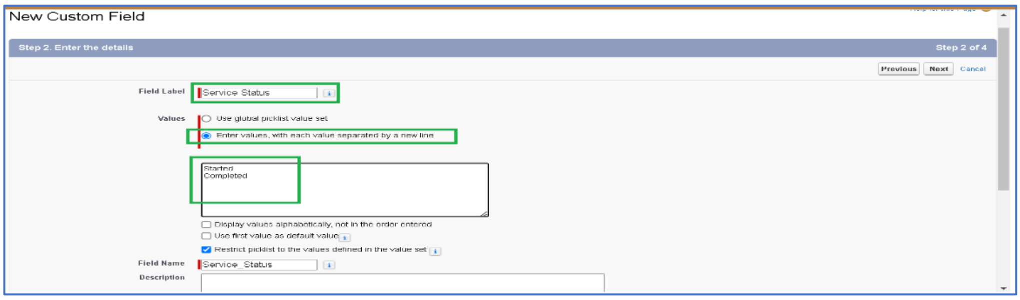


- Click on next >> next >> save

ACTIVITY – 7 :- Creation of Picklist Fields

Creation of Picklist Fields in Service records object :

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

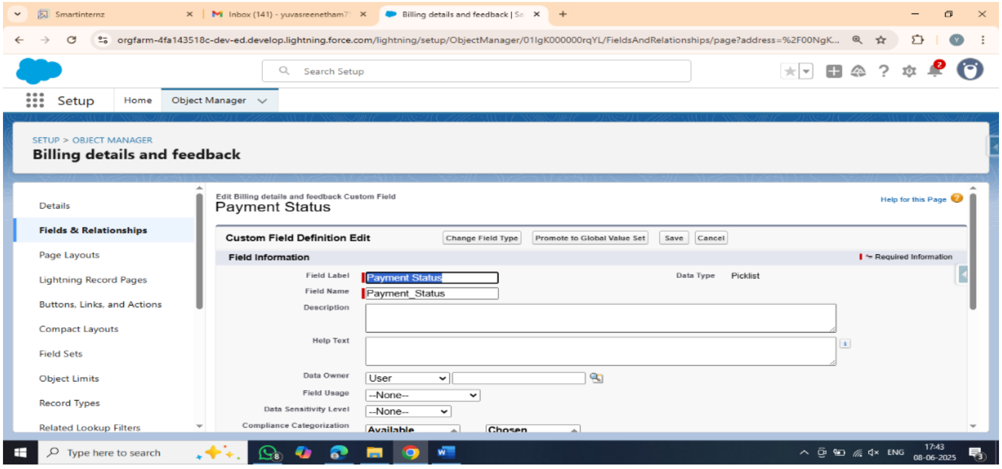


- Click Next.
- Next >> Next >> Save.

Creation of Picklist Fields in Billing details and feedback object :

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

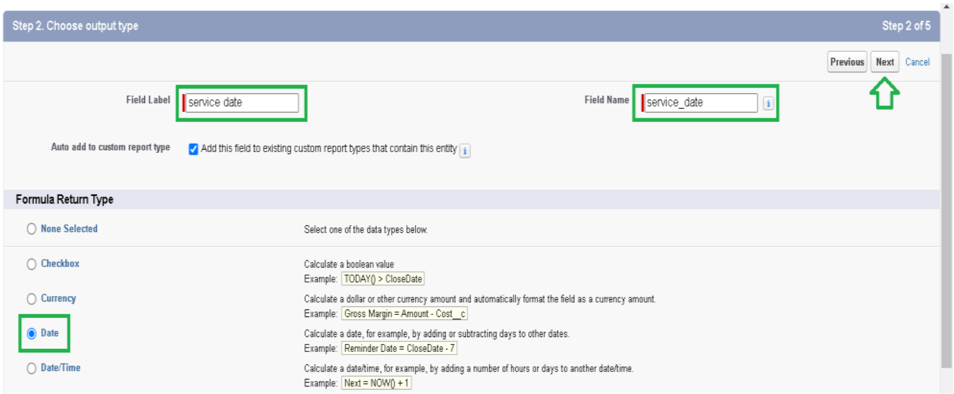
GARAGE MANAGEMENT SYSTEM



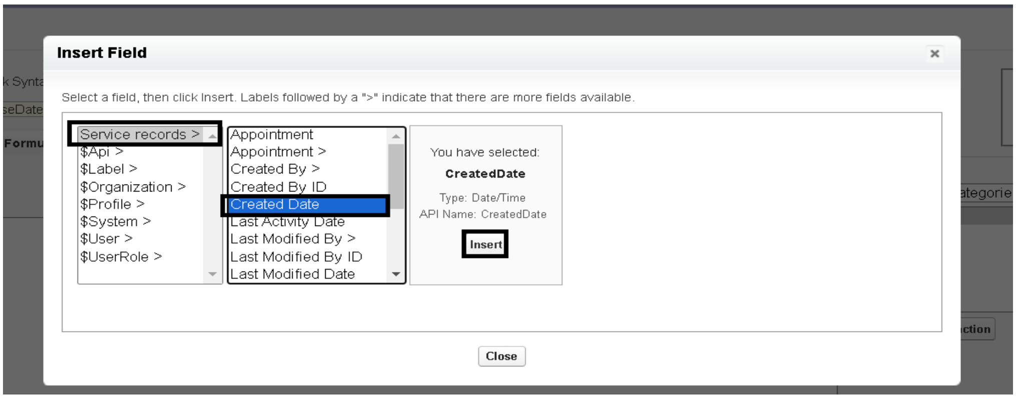
- Click Next.
- Next >> Next >> Save.

ACTIVITY – 8 :- Creating Formula Field in Service records Object

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



- Insert field formula should be : Created Date



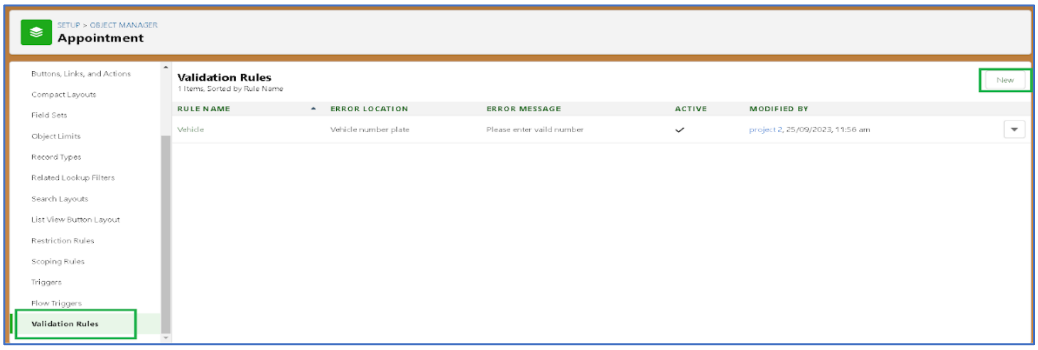
MILESTONE – 6

Validation rule

ACTIVITY -1 :- To create a validation rule to an Appointment Object

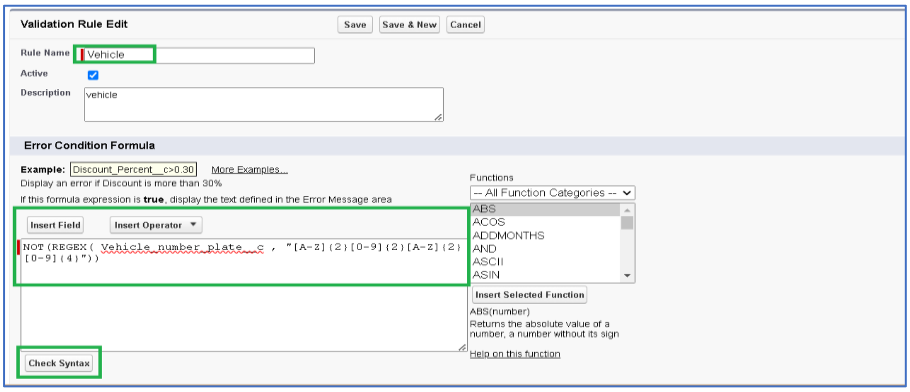
- Go to the setup page >> click on object manager >> From drop down click edit for Appointment object.

- Click on the validation rule >> click New.

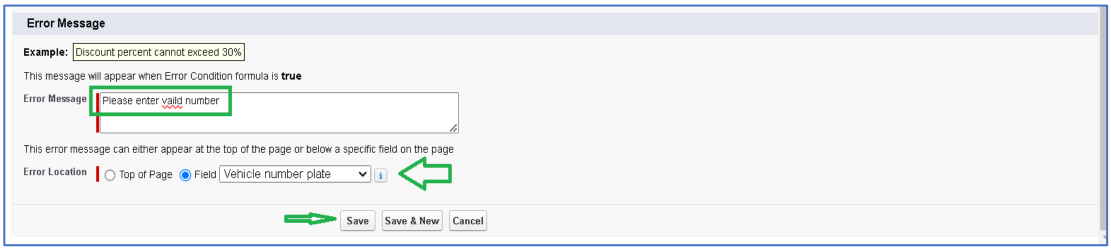


- Enter the Rule name as " Vehicle ".

- Insert the Error Condition Formula as : -
NOT(REGEX(Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))

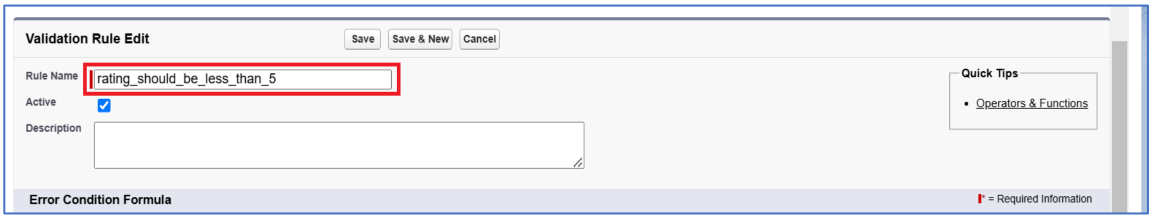


- Enter the Error Message as "Please enter vaild number ", select the Error location as Field and select the field as "Vehicle number plate", and click Save.

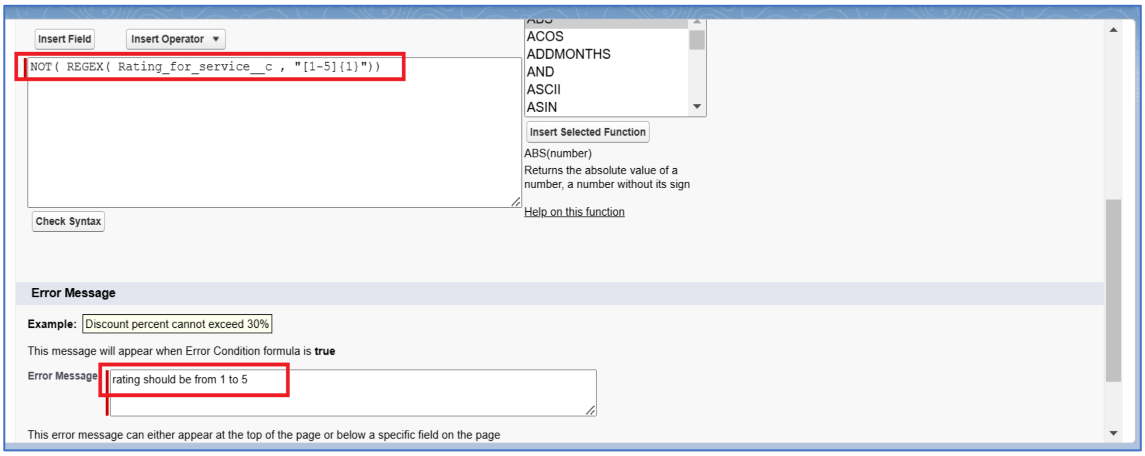


ACTIVITY -2:- To create a validation rule to an Billing details and feedback Object

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



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

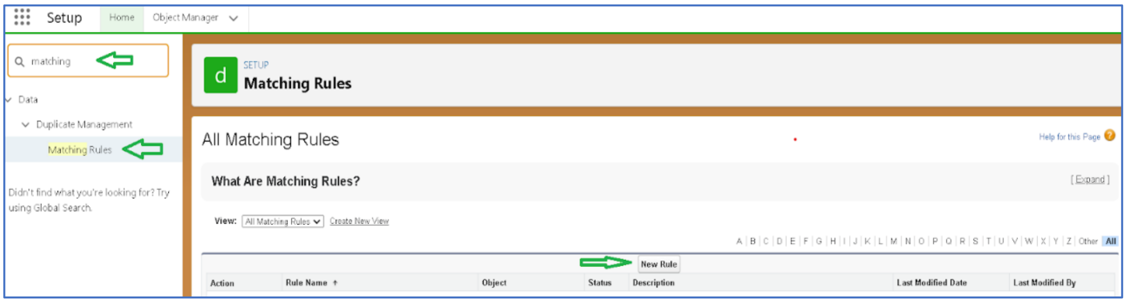


MILESTONE– 7

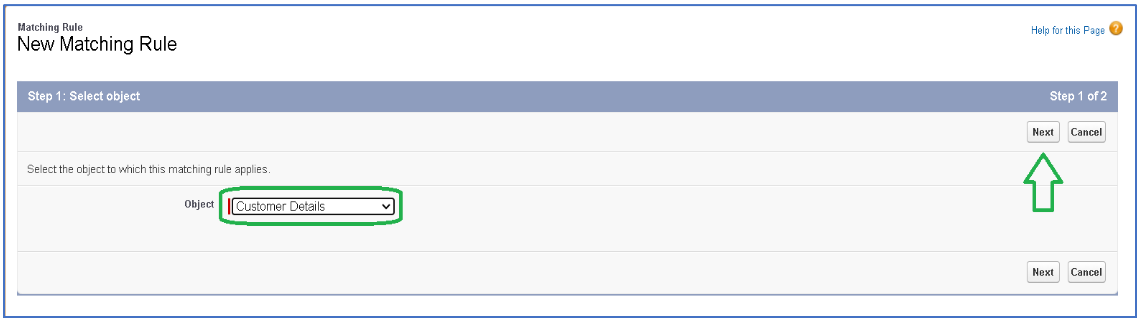
Duplicate rule

ACTIVITY – 1:- To create a matching rule to an Customer details Object

- 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.

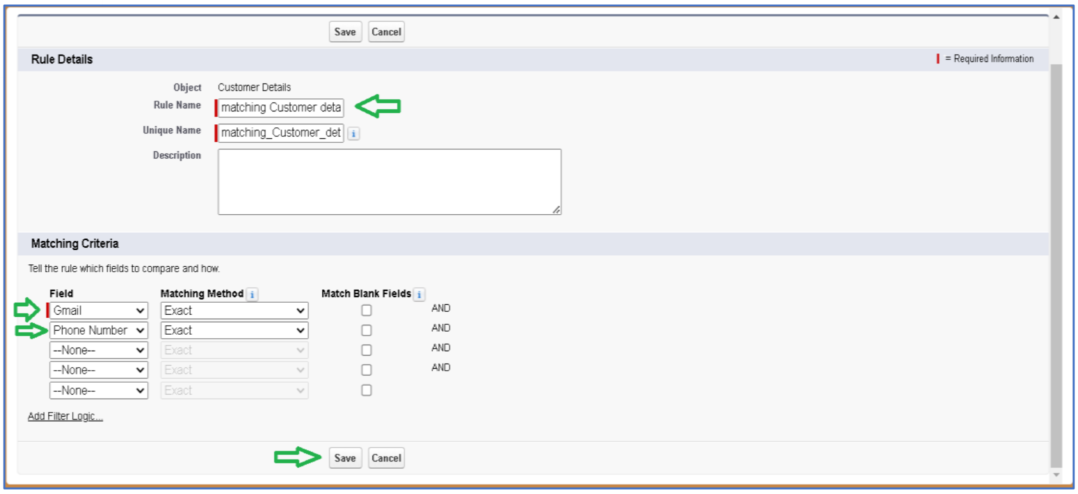


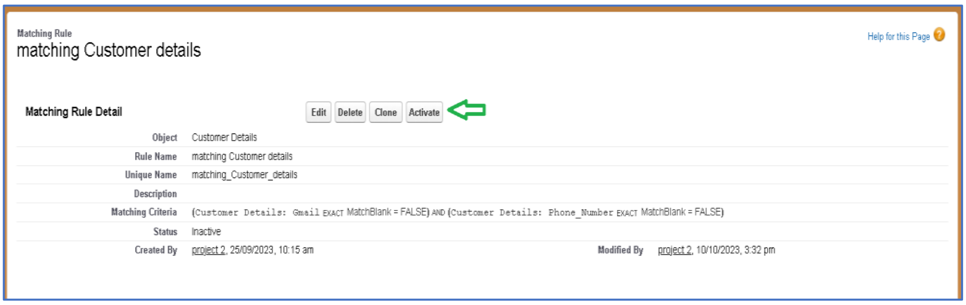
- Give the Rule name : Matching customer details
- Unique name : is auto populated
- Define the matching criteria as
- **Field** **Matching Method**

1. Gmail **Exact**

2. Phone Number **Exact**

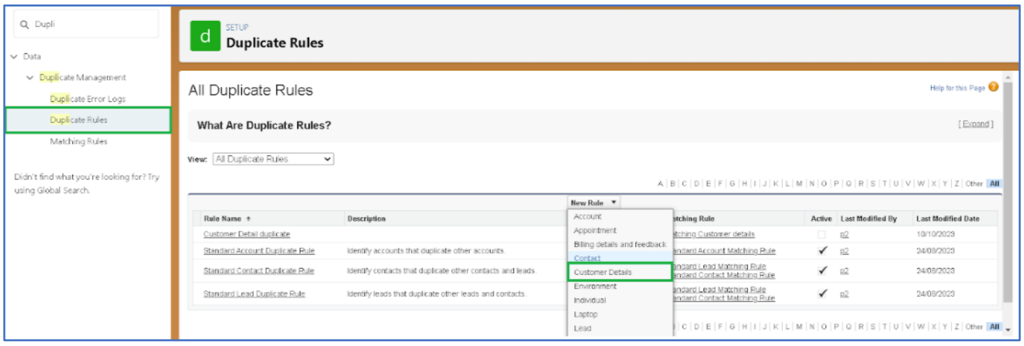
- Click save.
- After Saving Click on Activate.



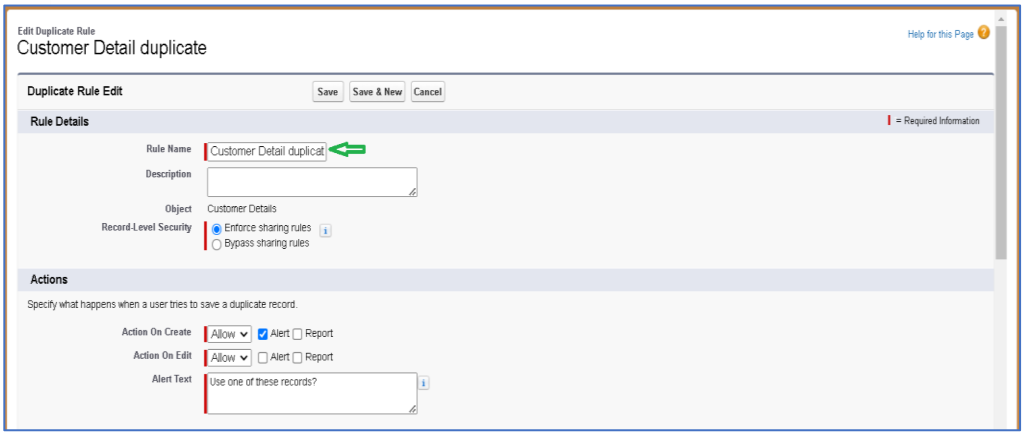


ACTIVITY – 2:- To create a Duplicate rule to an Customer details

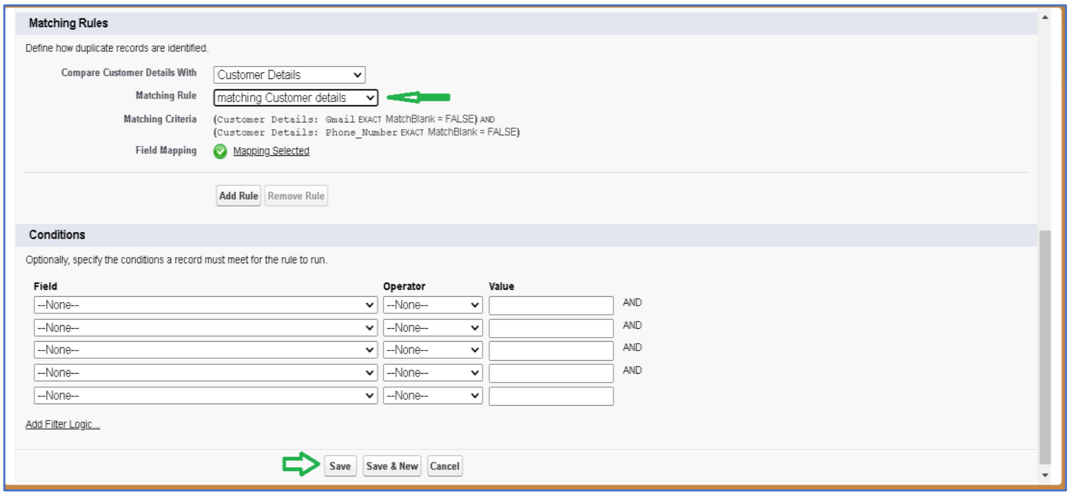
- Go to quick find box in setup and search for Duplicate rules.
- Click on Duplicate rule >> click on New Rule >> select customer details object.



- Give the Rule name as : Customer Detail duplicate
- Scroll a little in Matching rule section



- Select the matching rule : Matching customer details
- And Click on save.
- After saving the Duplicate Rule, Click on Activate.



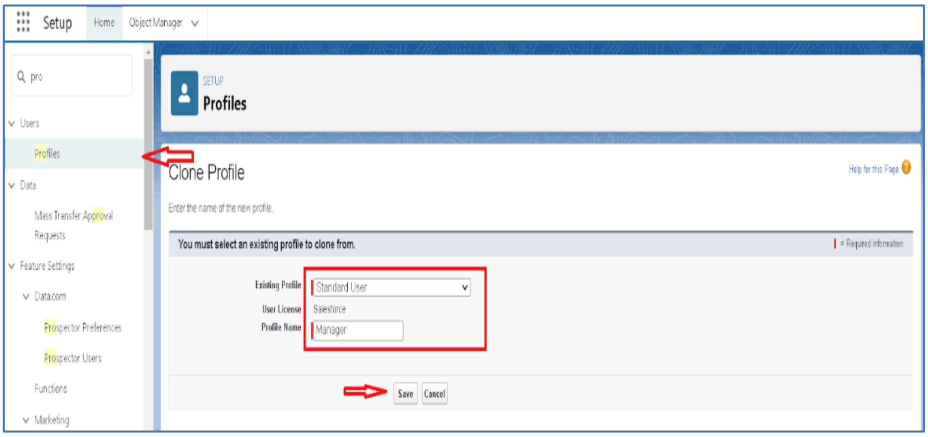
GARAGE MANAGEMENT SYSTEM

MILESTONE – 8

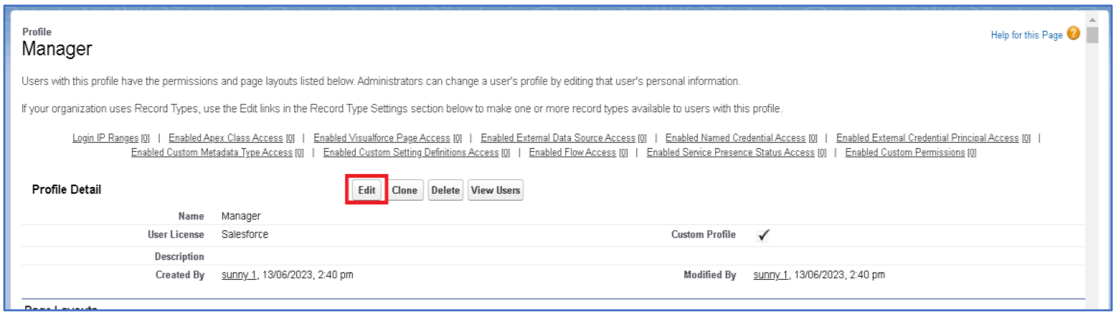
Profiles

ACTIVITY – 1 :- Manager Profile create a new profile:

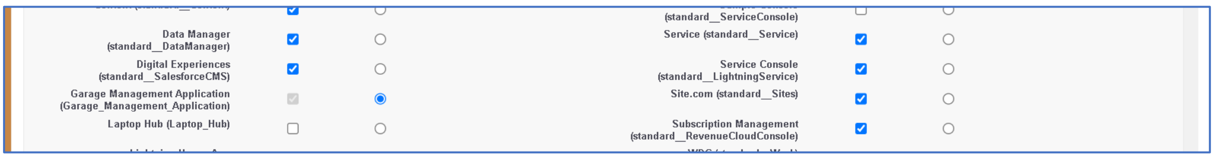
- Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (Manager) >> Save



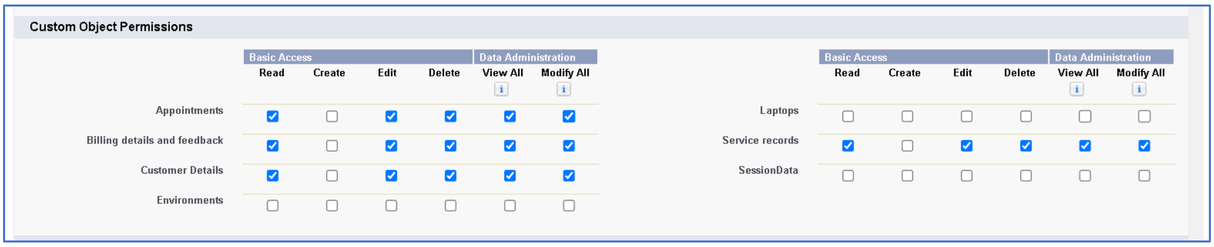
- While still on the profile page, then click Edit.



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



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



Custom Object Permissions

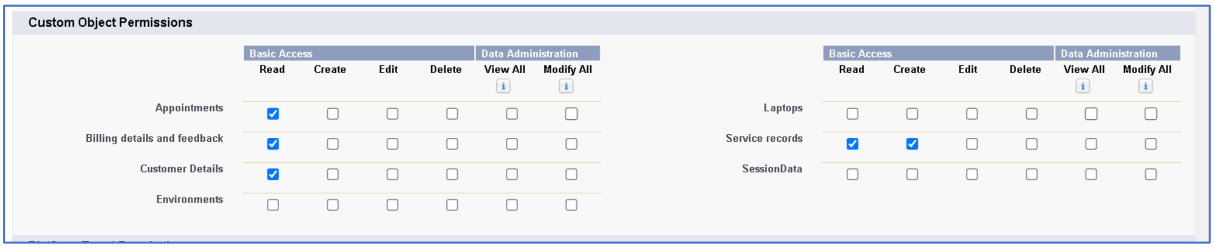
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Appointments	☑	☐	☑	☑	☑	☑
Billing details and feedback	☑	☐	☑	☑	☑	☑
Customer Details	☑	☐	☑	☑	☑	☑
Environments	☐	☐	☐	☐	☐	☐

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Laptops	☐	☐	☐	☐	☐	☐
Service records	☑	☐	☑	☑	☑	☑
SessionData	☐	☐	☐	☐	☐	☐

- 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.

ACTIVITY – 2: sales person Profile

- 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.
- 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 And click save.
- objects as mentioned in the below diagram.



Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Appointments	☑	☐	☐	☐	☐	☐
Billing details and feedback	☑	☐	☐	☐	☐	☐
Customer Details	☑	☐	☐	☐	☐	☐
Environments	☐	☐	☐	☐	☐	☐

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Laptops	☐	☐	☐	☐	☐	☐
Service records	☑	☑	☐	☐	☐	☐
SessionData	☐	☐	☐	☐	☐	☐

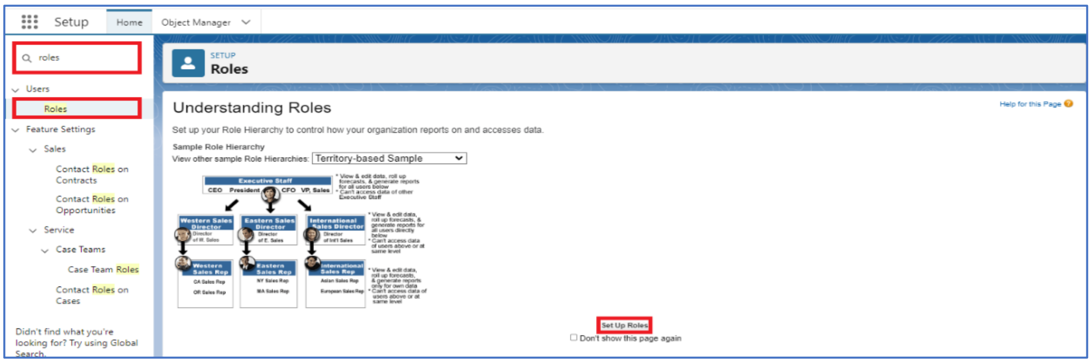
- And click save.

MILESTONE – 9
Role & Role Hierarchy

ACTIVITY – 1:- Creating Manager Role

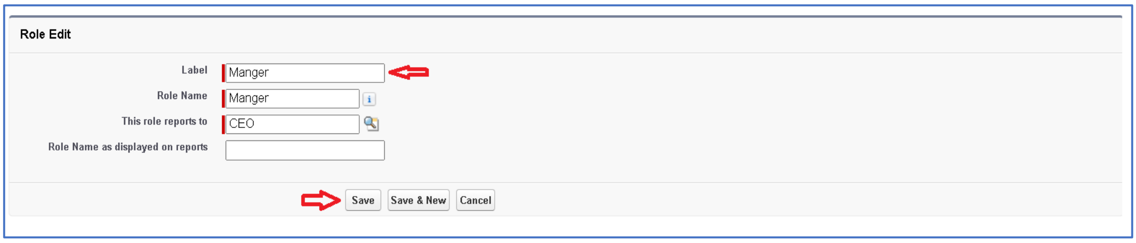
Creating Manager Role:

- 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



ACTIVITY – 2:- Creating another roles

Creating another two roles under manager

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

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

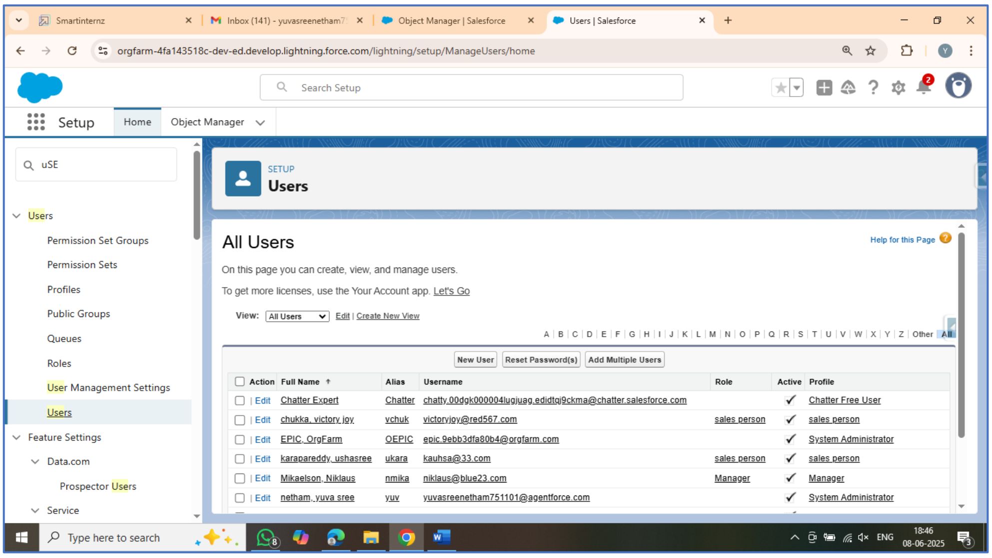
GARAGE MANAGEMENT SYSTEM

MILESTONE – 10

Users

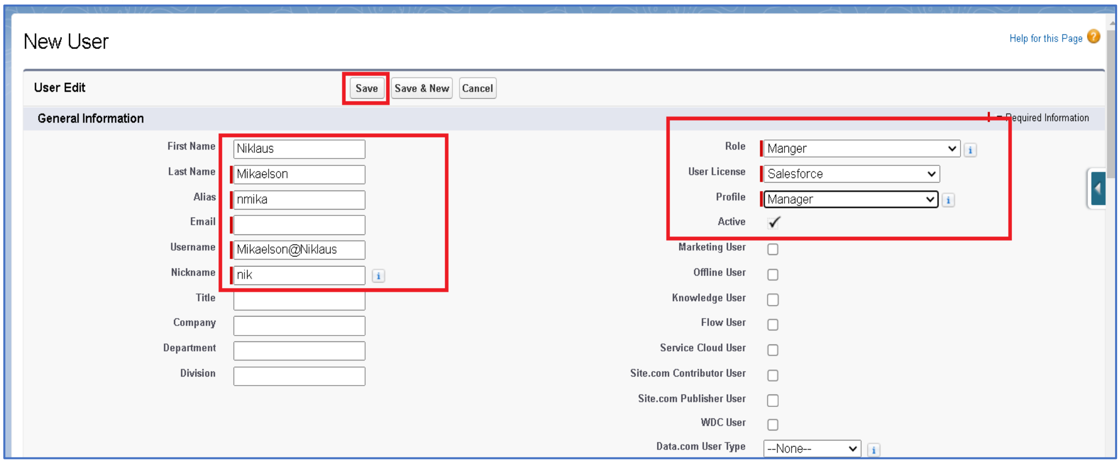
ACTIVITY – 1:- Create User

- Go to setup >> type users in quick find box >> select users >> click New user.



- Fill in the fields

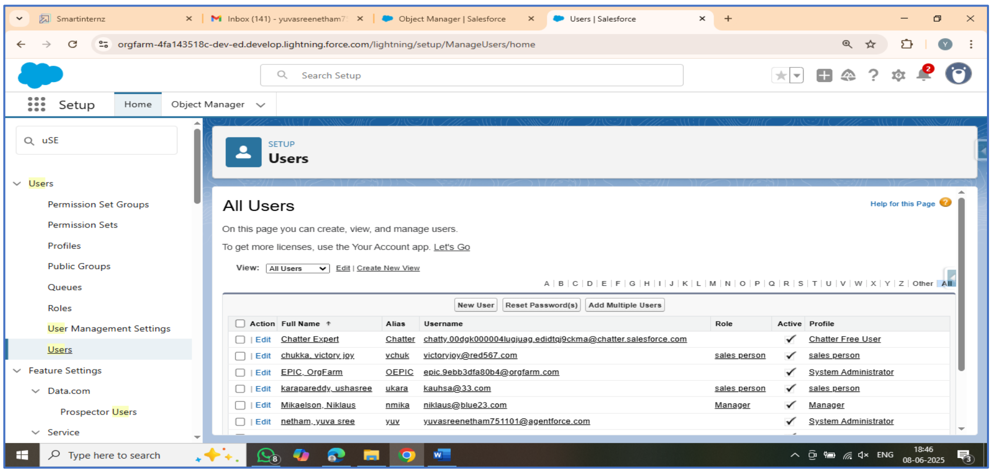
  - ➢ First Name : Niklaus
  - ➢ Last Name : Mikaelson
  - ➢ Alias : Give a Alias Name
  - ➢ Email id : Give your Personal Email id
  - ➢ Username : Username should be in this form: text@text.text
  - ➢ Nick Name : Give a Nickname
  - ➢ Role : Manager
  - ➢ User licence : Salesforce
  - ➢ Profiles : Manager.



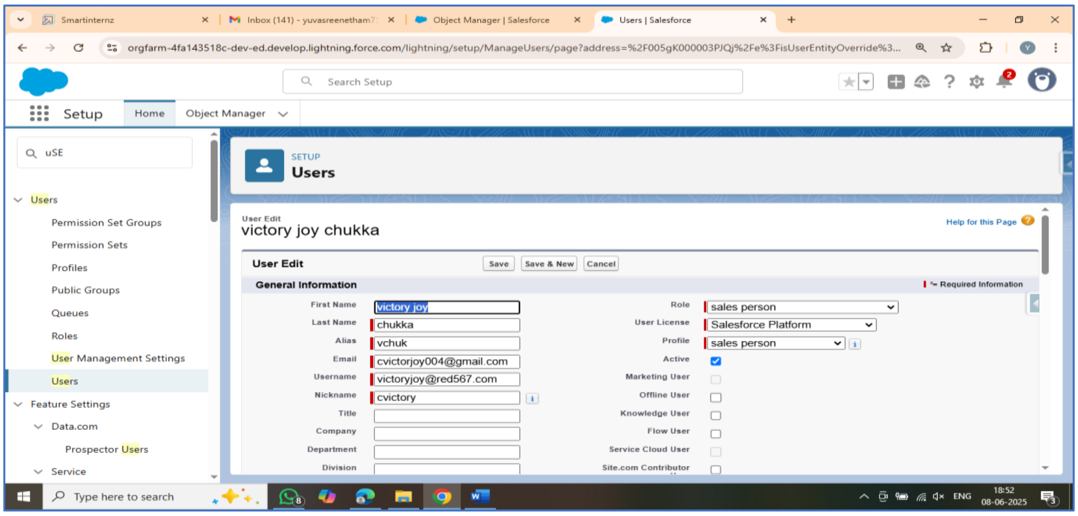
- Save.

ACTIVITY – 2 :- creating another users

- Go to setup >> type users in quick find box >> select users >> click New user.



➢ Fill in the fields
  - First Name : victory joy
  - Last Name : chukka
  - Alias : vchuk
  - Email id : victoryjoy@gmail.com
  - Username : Username should be in this form: text@text.text
  - Nick Name : joy
  - Role : sales person
  - User licence : Salesforce Platform
  - Profiles : sales person


Setup
Home
Object Manager
Search Setup
Users
Permission Set Groups
Permission Sets
Profiles
Public Groups
Queues
Roles
User Management Settings
Users
Feature Settings
Data.com
Prospector Users
Service
SETUP
Users
User Edit
victory joy chukka
Help for this Page
User Edit
Save
Save & New
Cancel
General Information
= Required Information
First Name
victory joy
Last Name
chukka
Alias
vchuk
Email
cvictorjoy004@gmail.com
Username
victoryjoy@red567.com
Nickname
cvictory
Title
Company
Department
Division
Role
sales person
User License
Salesforce Platform
Profile
sales person
Active
Marketing User
Offline User
Knowledge User
Flow User
Service Cloud User
Site.com Contributor
Type here to search

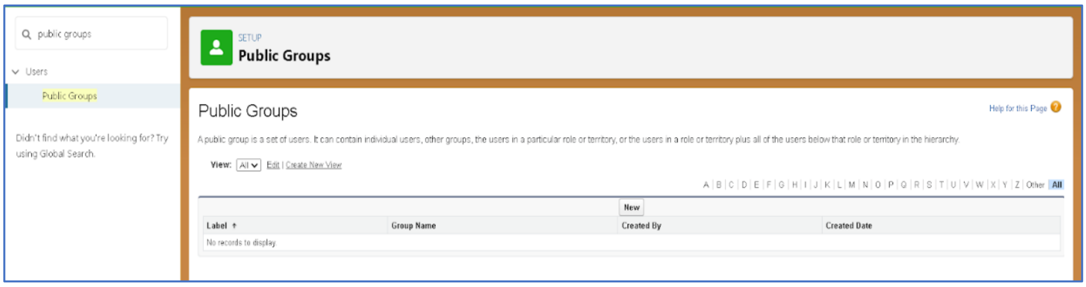
- Save.

GARAGE MANAGEMENT SYSTEM

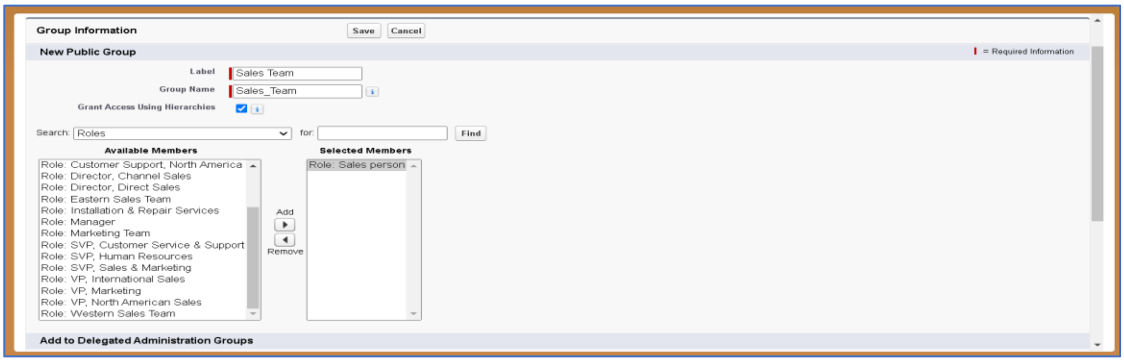
Milestone - 11
Public Groups

ACTIVITY – 1:- Creating New Public Group

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



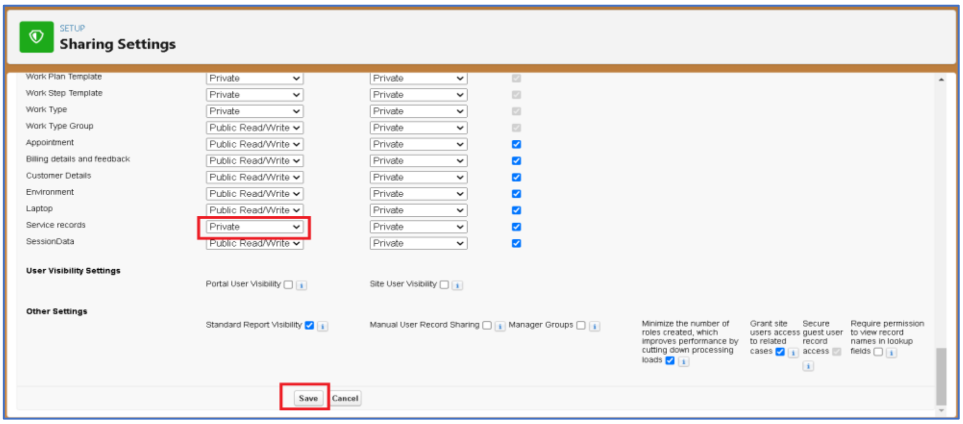
- Give the Label as “sales team”.
- Group name is auto populated.
- Search for Roles.
- In Available Members select Sales person and click on add it will be moved to selected member.
- Click on save.



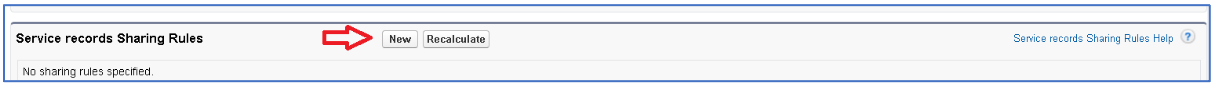
Milestone – 12
Sharing Settings

ACTIVITY – 1:- Creating Sharing settings

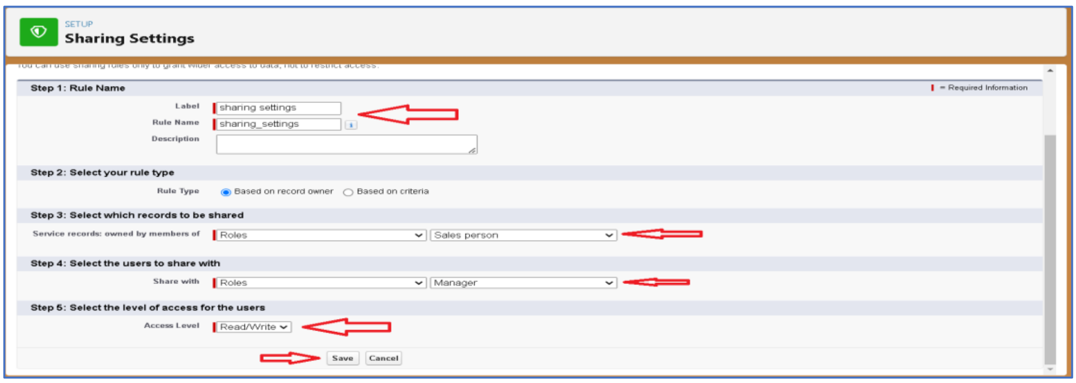
- Go to setup >> type users in quick find box >> select Sharing Settings >> click Edit.
- Change the OWD setting of the Service records Object to private as shown in fig.



- Click on save and refresh.
- Scroll down a bit, Click new on Service records sharing Rule



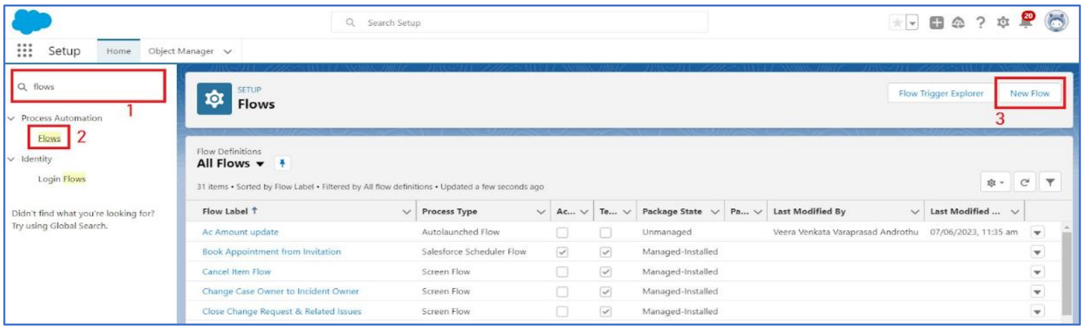
- Give the Label name as " Sharing setting"
- Rule name is auto populated.
- In step 3 : Select which records to be shared, members of " Roles " >> " Sales person"
- In step 4: share with, select " Roles " >> " Manager "
- In step 5 : Change the access level to " Read / write ".
- Click on save.



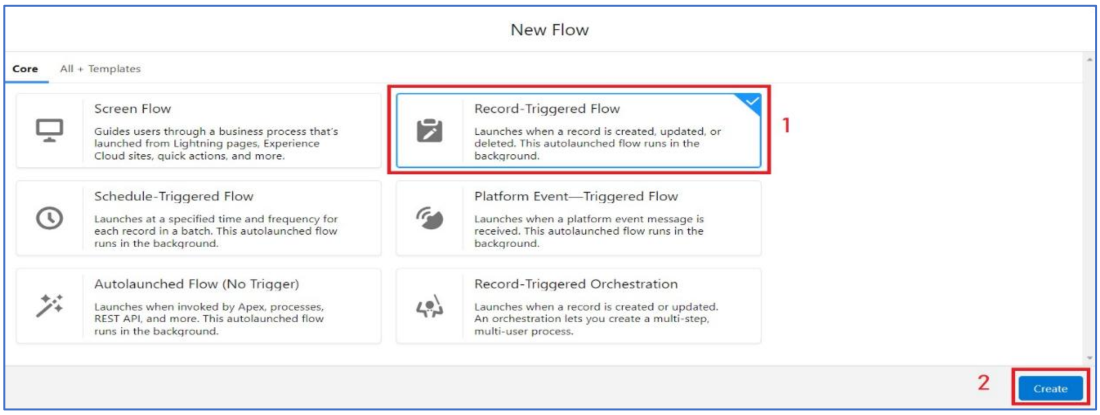
Milestone – 13
Fields

ACTIVITY – 1:- Create a Flow

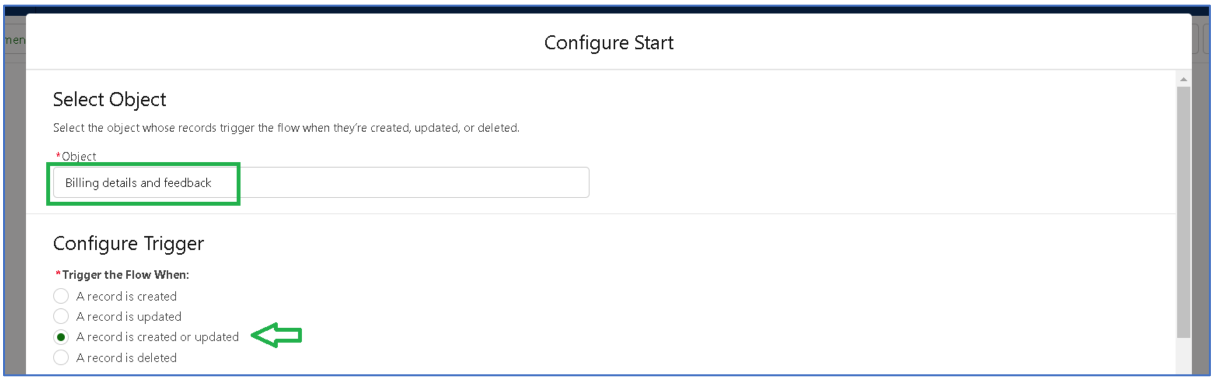
- Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.



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

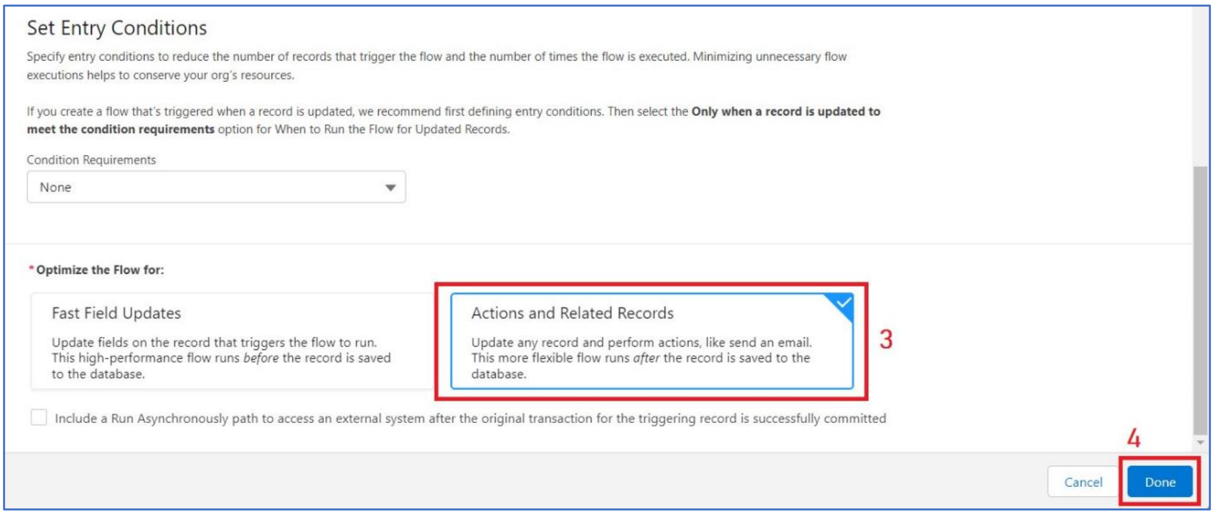


- Select the Object as “Billing details and feedback”in the Drop down list.
- Select the Trigger Flow when: “A record is Created or Updated”.

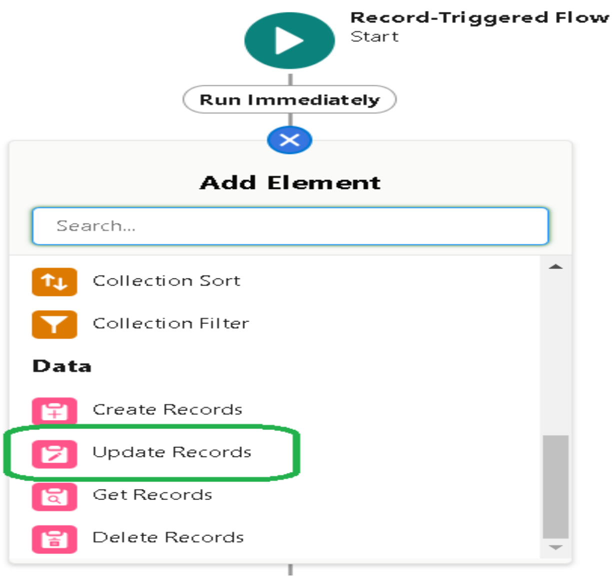


Select the Optimize the flow for: “Actions and Related Records” and Click on Done.

GARAGE MANAGEMENT SYSTEM

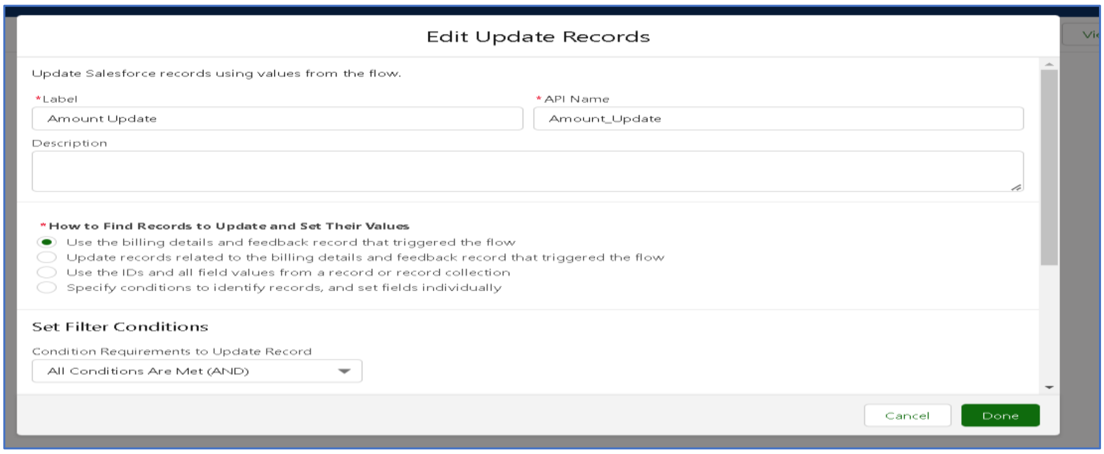


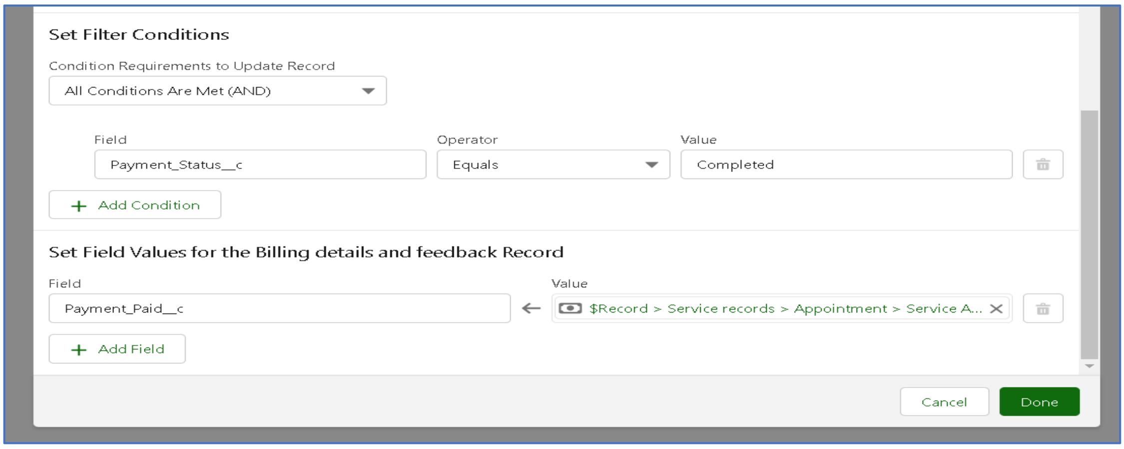
- Under the Record-triggered Flow Click on "+" Symbol and In the Drop down List select the "Update records Element".



Give the Label Name : Amount Update

- Api name : is auto populated

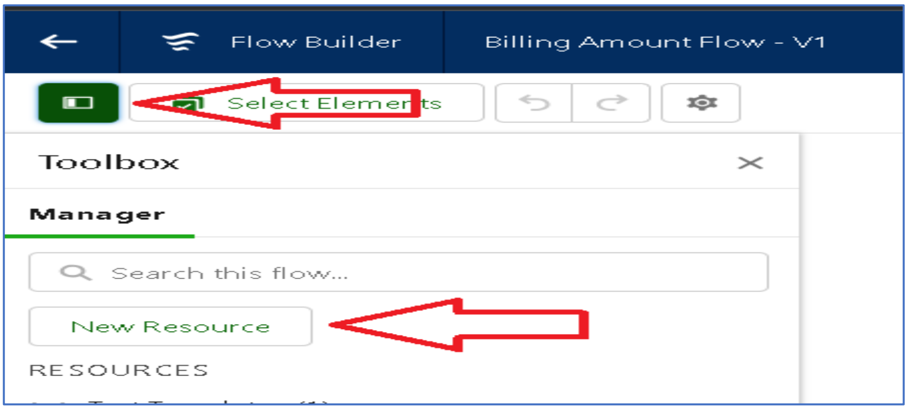




Set a filter condition : All Conditions are met(AND)

- 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.

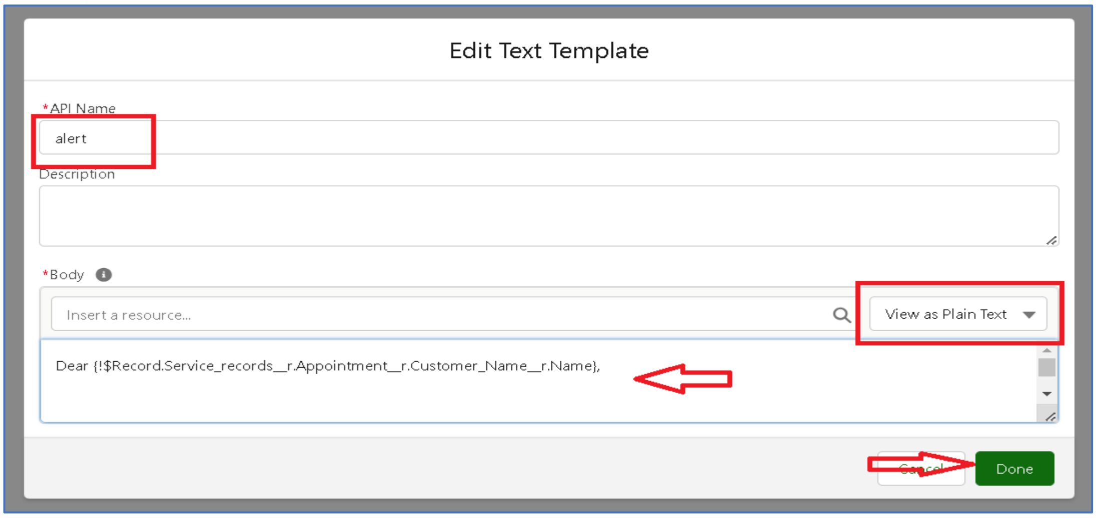
Dear {!$Record.Service_records__r.Appointment__r.Customer_Name__r.Name},

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.

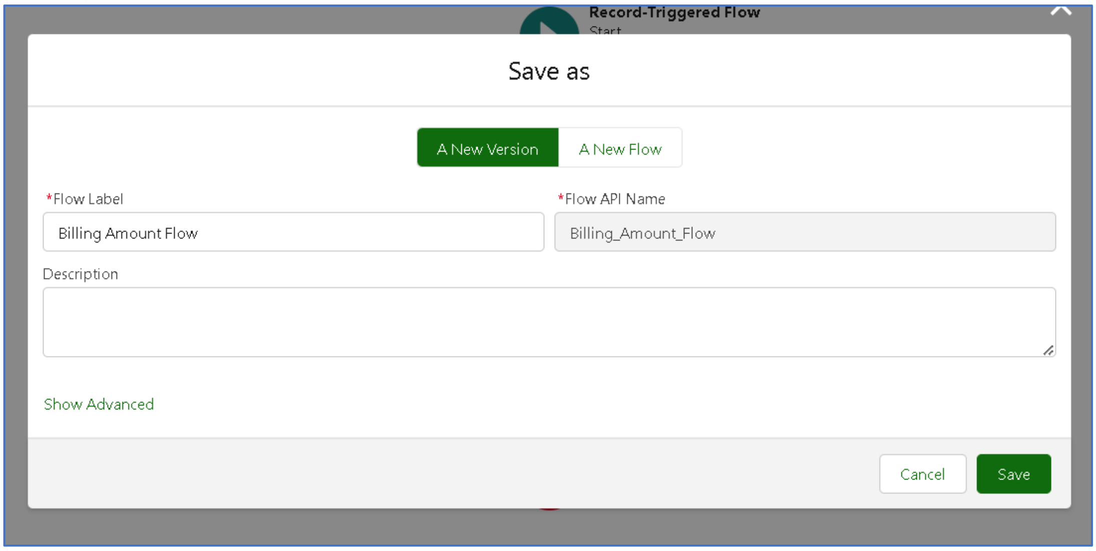
Amount paid : {!$Record.Payment_Paid__c}

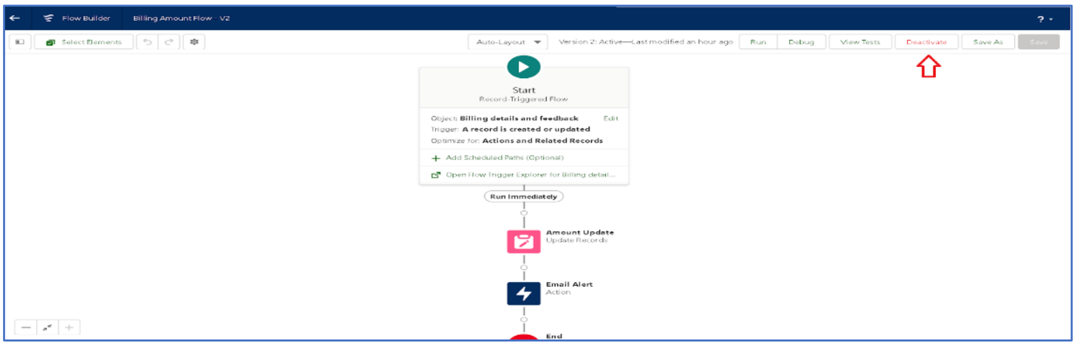
Thank you for Coming .

- Click done.



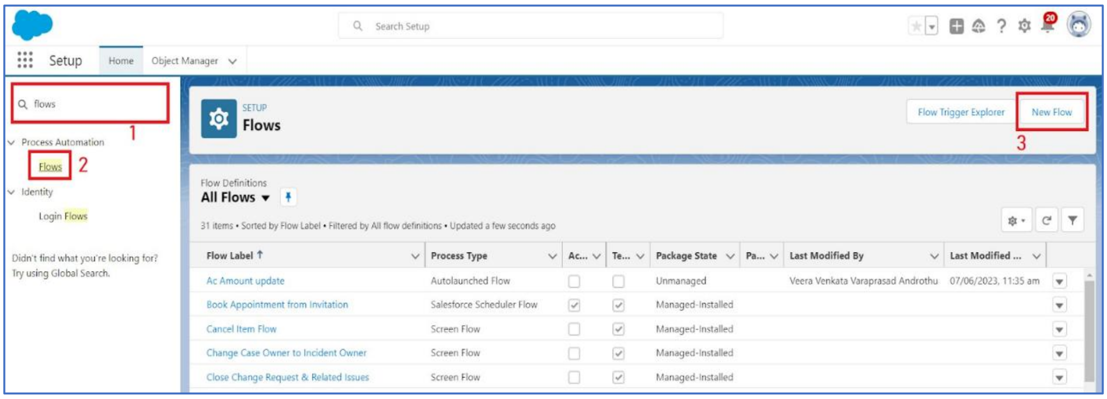
- Now Click on Add Element , select Action.
- Their action bar will be opened in that search for " send email " and click on it.
- Give the label name as " Email Alert"
- API name will be auto populated.
- Enable the body in set input values for the selected action.
- Select the text template that created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



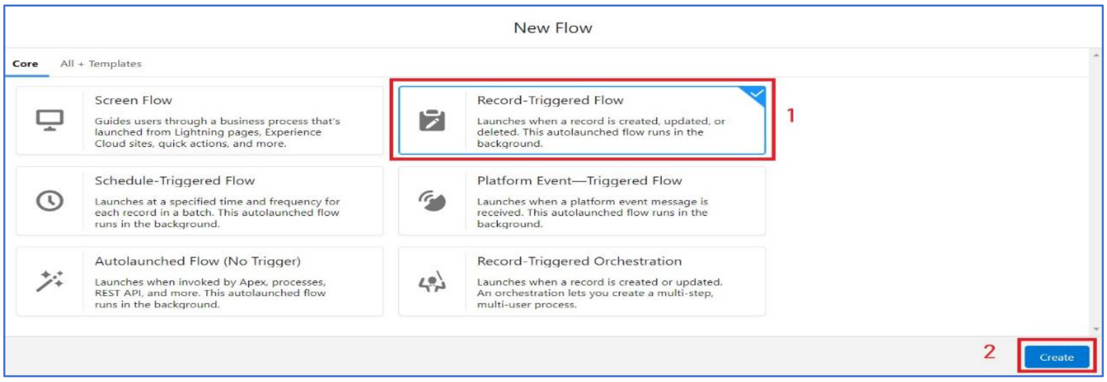


ACTIVITY – 2 :- Create another Flow

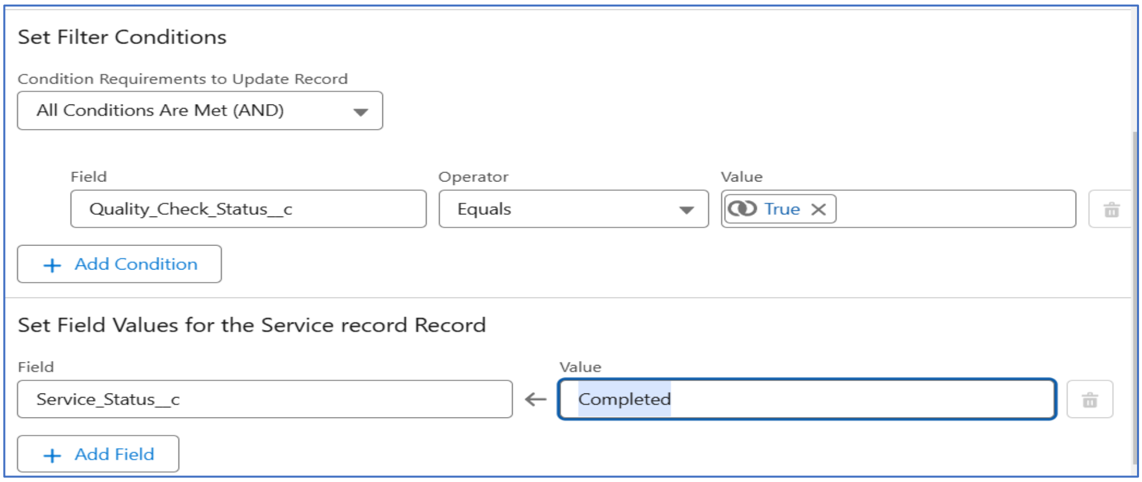
- Go to setup ? type Flow in quick find box ? Click on the Flow and Select the New Flow.



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



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



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

GARAGE MANAGEMENT SYSTEM

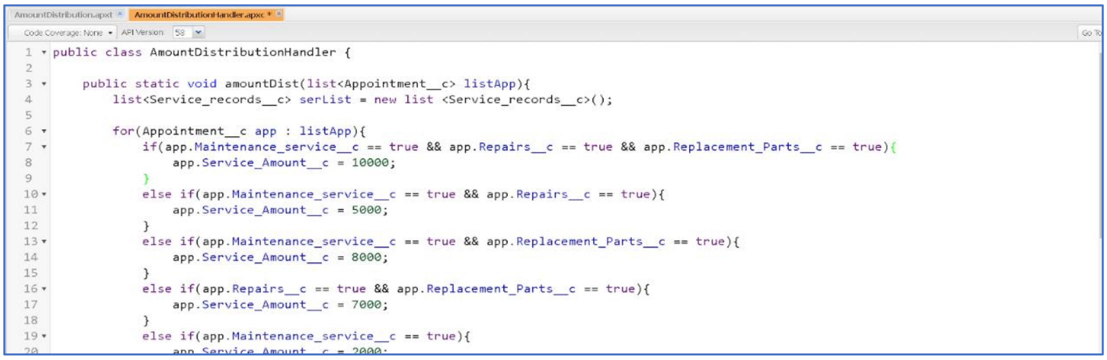
MILESTONE – 14

Apex Trigger

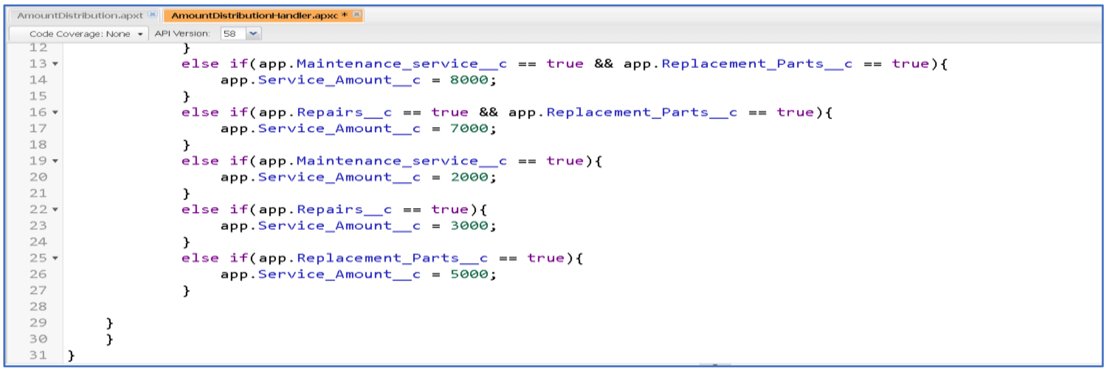
ACTIVITY -1 :- Apex handler

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

- 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 ”.



```
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.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;
            }

        }
    }
}
```

Code:

```
public class AmountDistributionHandler {

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

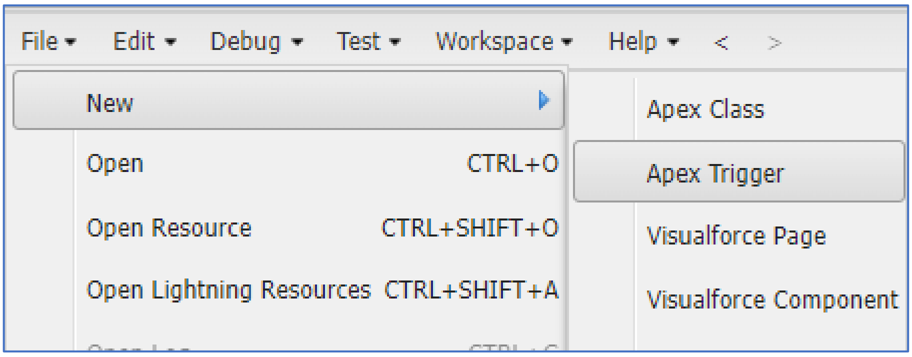
```
list<Service_records__c> serList = new list <Service_records__c>();

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 :

- 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**



Syntax For creating trigger :

The syntax for creating trigger is :

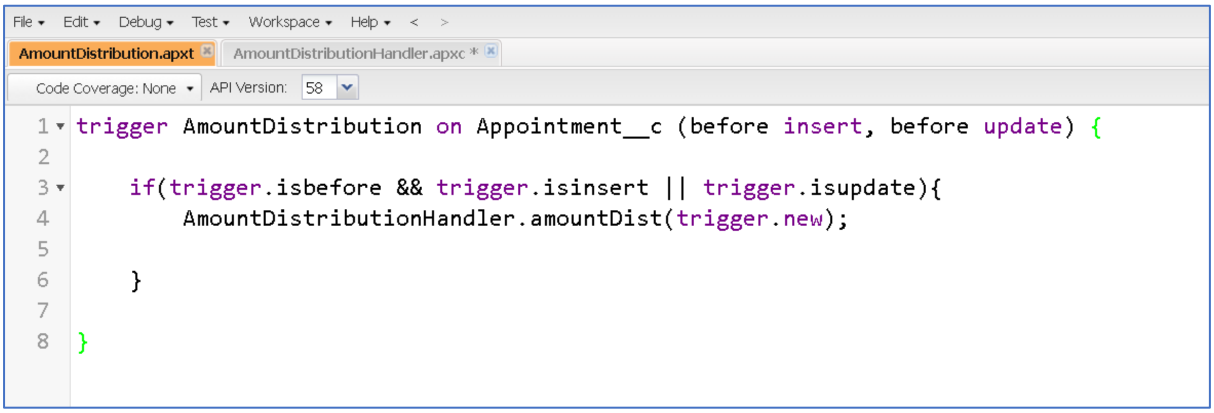
Trigger [trigger name] on [object name](Before/After event)

{

}

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**



Code:

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

    if(trigger.isbefore && trigger.isinsert || trigger.isupdate){

        AmountDistributionHandler.amountDist(trigger.new);

    }
```

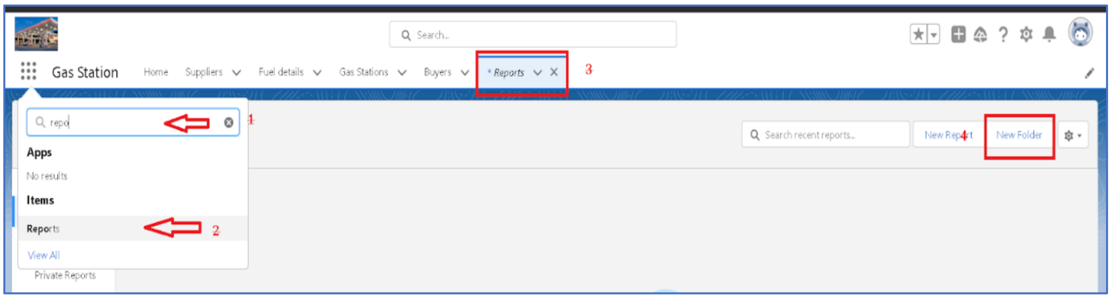
GARAGE MANAGEMENT SYSTEM

MILESTONE – 15

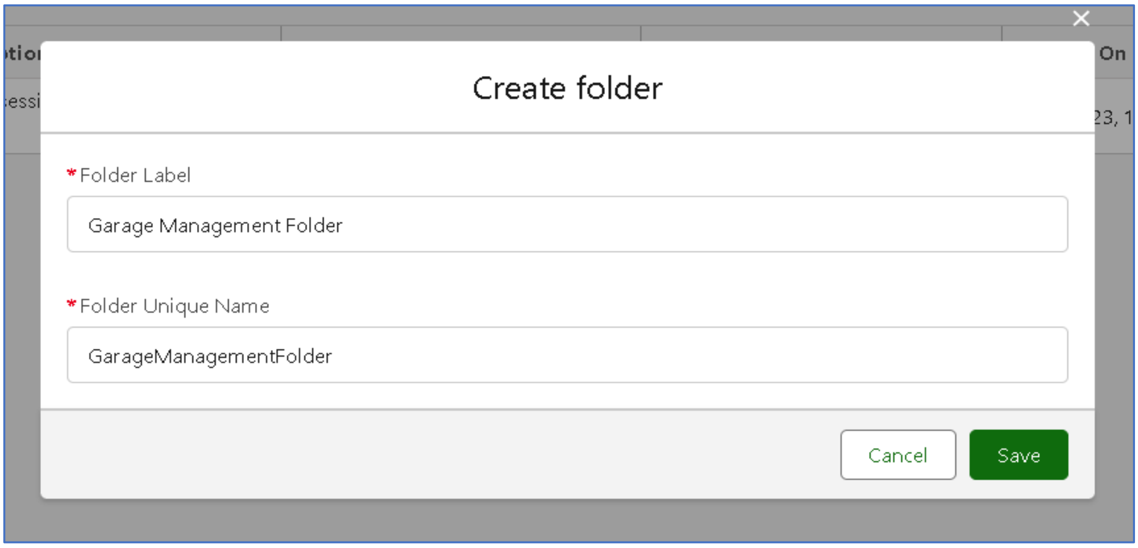
Reports

ACTIVITY – 1:- create a report folder

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

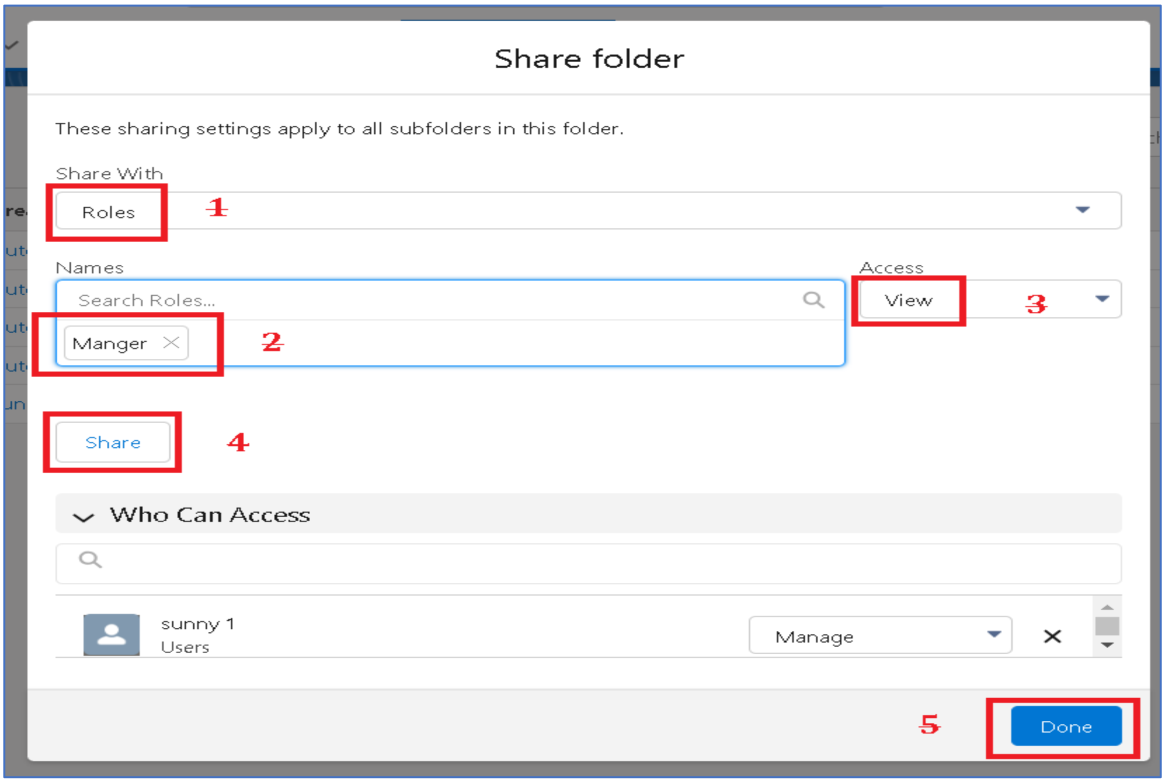


- Give the Folder label as “Garage Management Folder”, Folder unique name will be auto populated.
- Click save.



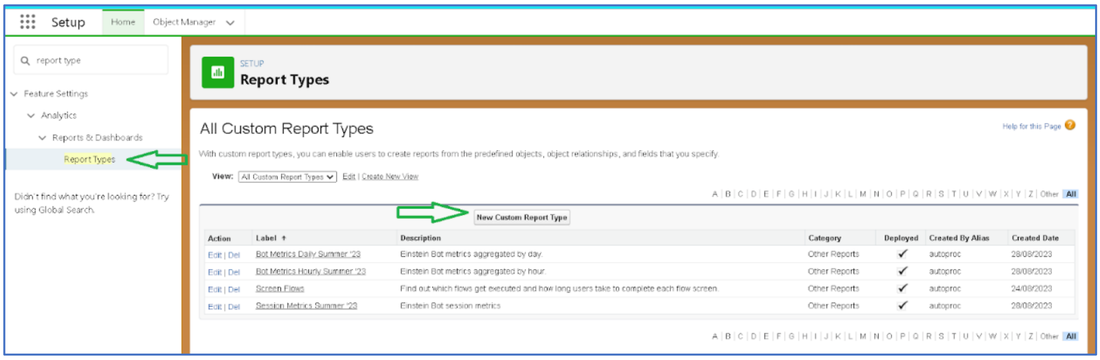
ACTIVITY – 2: - Sharing a report folder

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

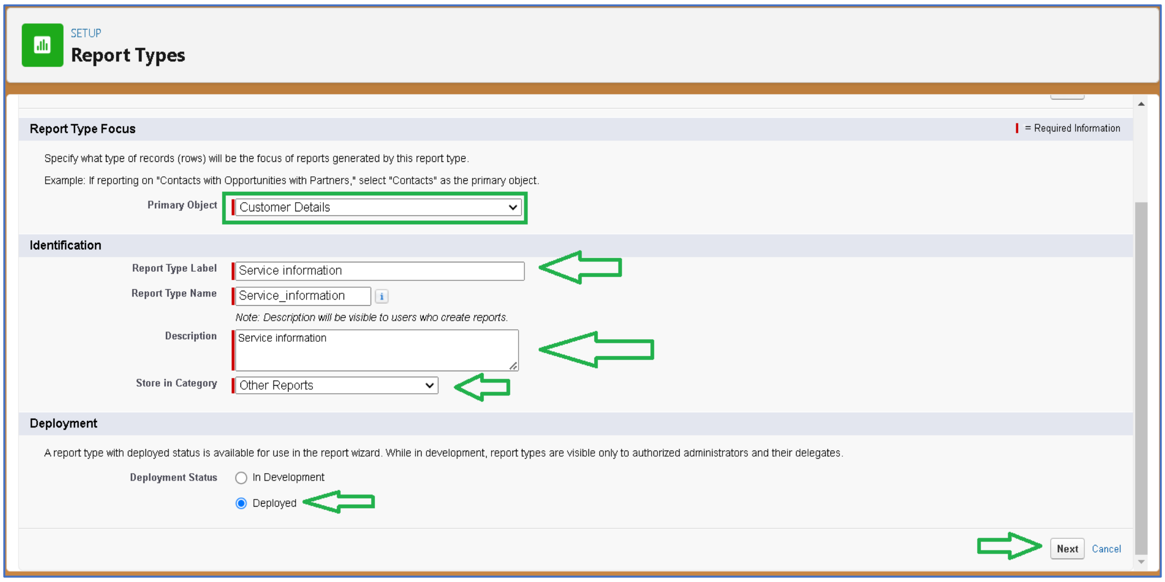


ACTIVITY – 3:- Create Report Type

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

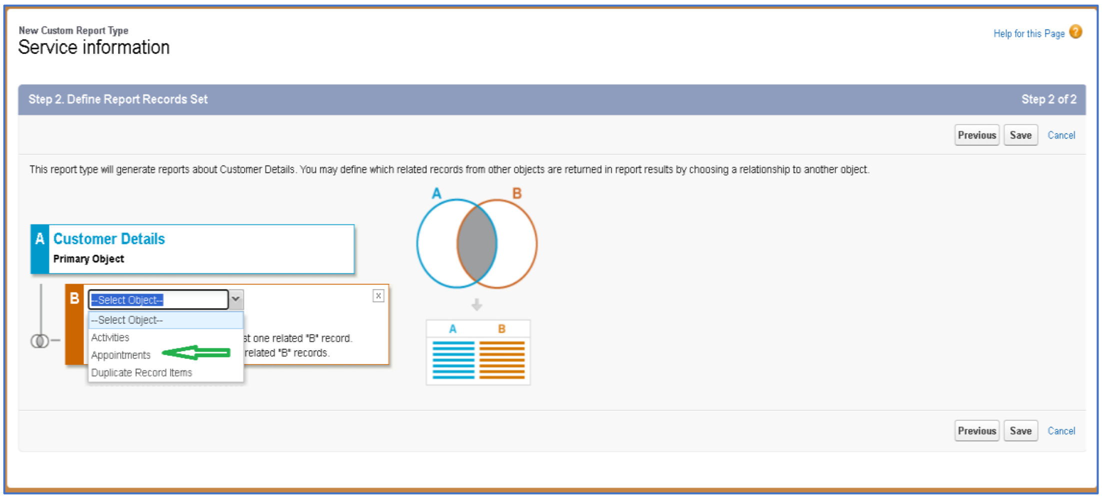


- Select the Primary object as " Customer details" .
- Give the Report type Label as " Service information "
- Report type Name is autopopulated.
- Keep the Description as same.
- Select Store in Category as " other Reports "
- Select the deployment status as " Depolyed ", click on Next.

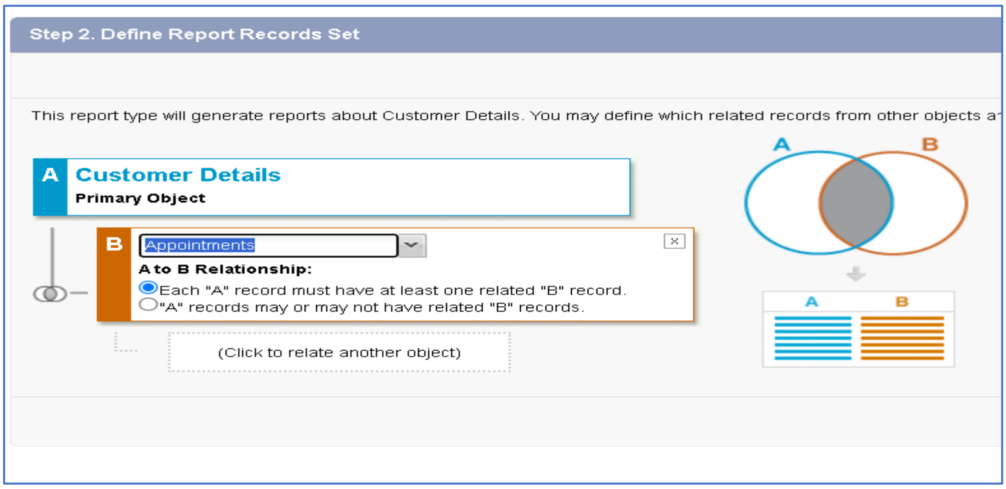


- now , Click on Related object box.

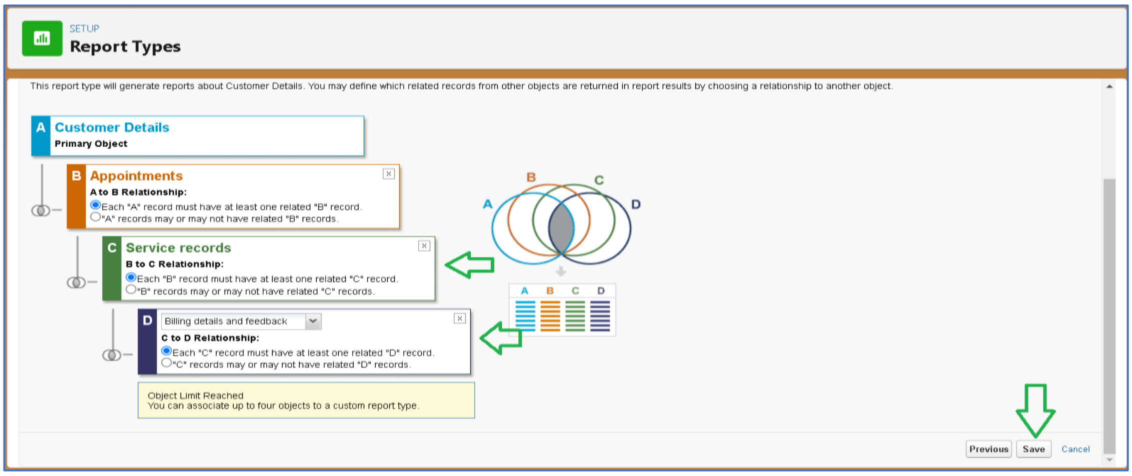
- Click on Select Object, choose Appointment Object as shown in fig.



- Again, click to relate another object.

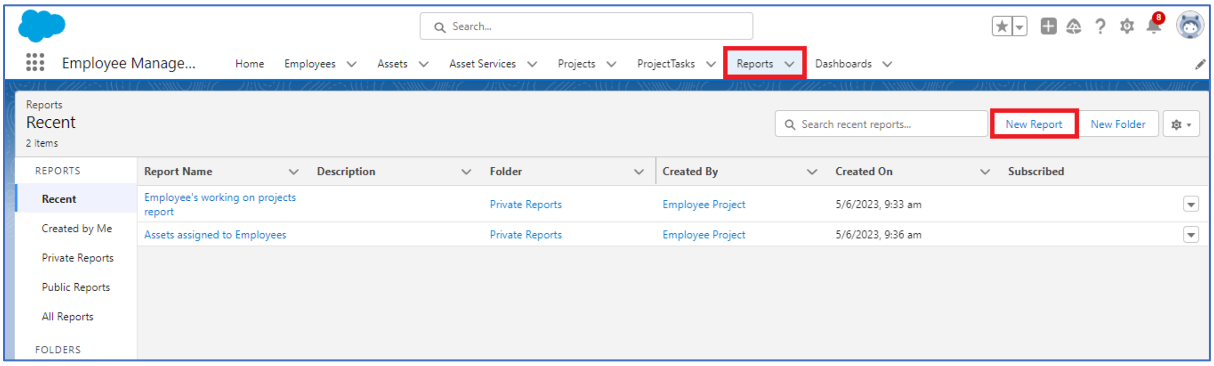


- And select the related object as " service records".
- Repeat the process and select the related object as " Billing details and feedback".
- And click on save.

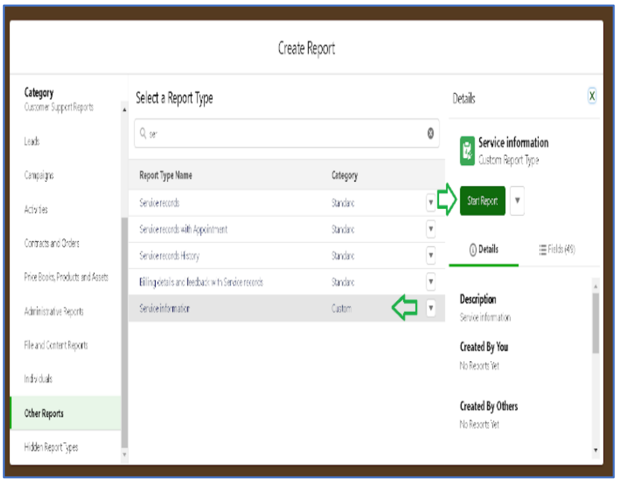


ACTIVITY – 4 :- Create Report

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

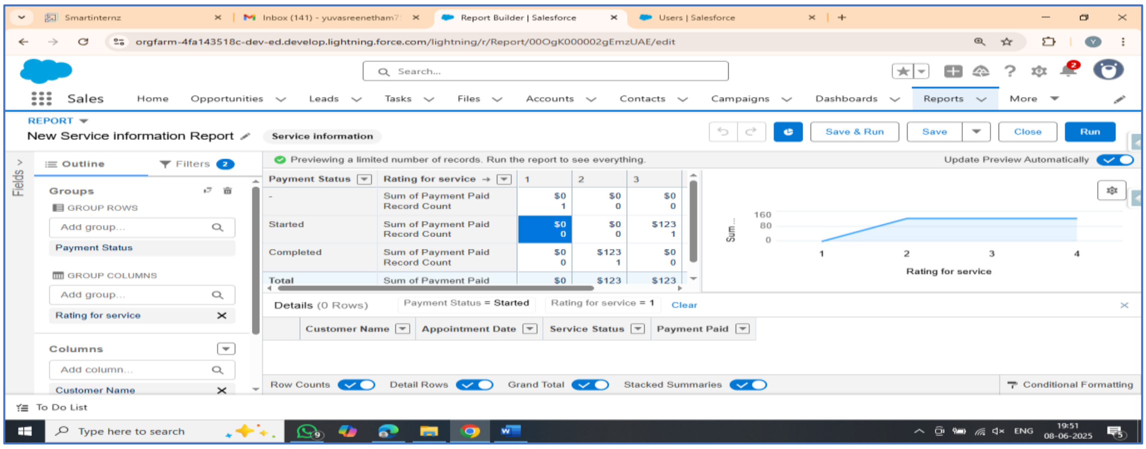


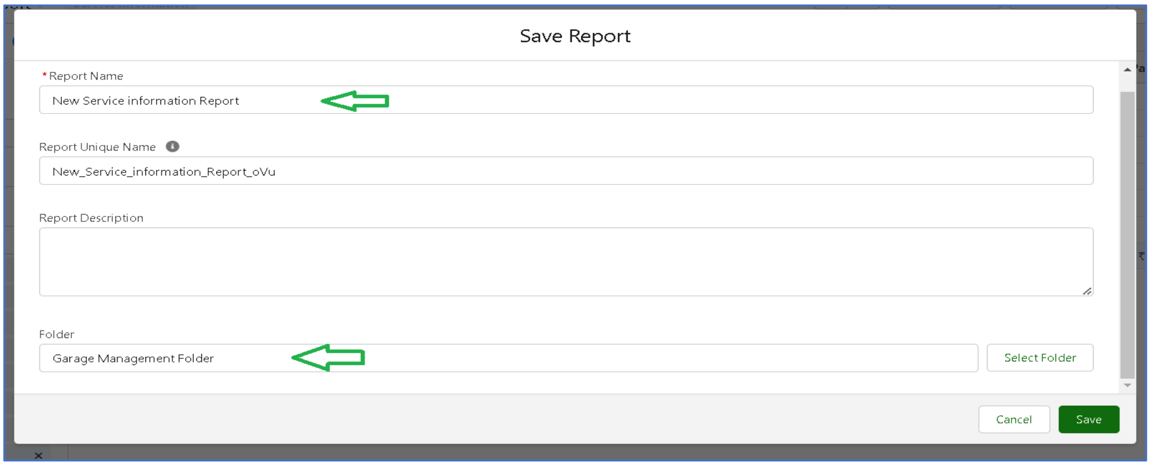
- Select the Category as other reports, search for Service Information, select that report, click on it. And click on start report



GARAGE MANAGEMENT SYSTEM

- Their outline pane is opened alredy, select the fields that mentioned below in column section.
    - Customer name
    - Appointment Date
    - Service Status
    - Payment paid
- Remove the unnecessary fields.
- Select the fields that mentioned below in GROUP ROWS section.
    - Rating for Service
- Select the fields that mentioned below in GROUP





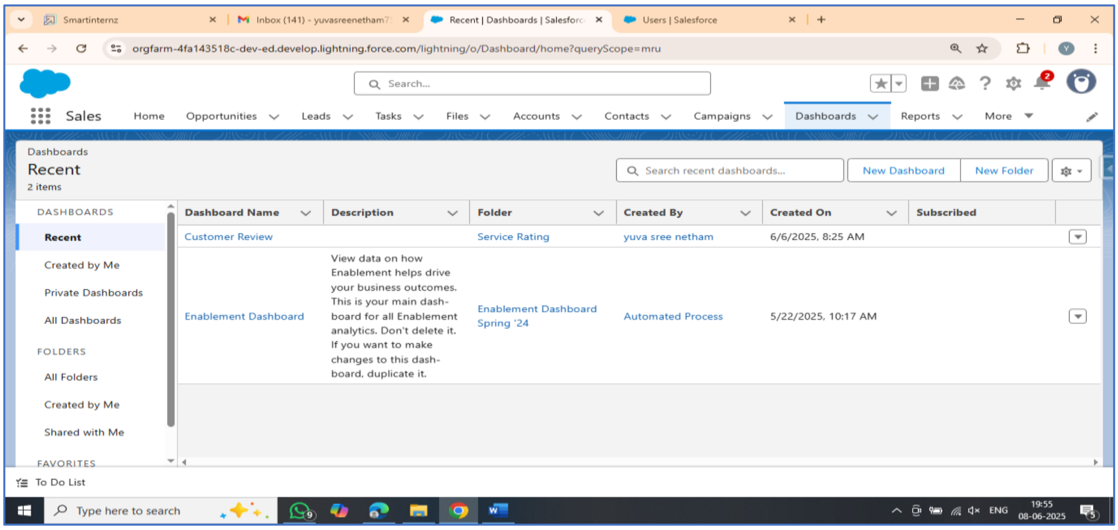
GARAGE MANAGEMENT SYSTEM

MILESTONE – 16

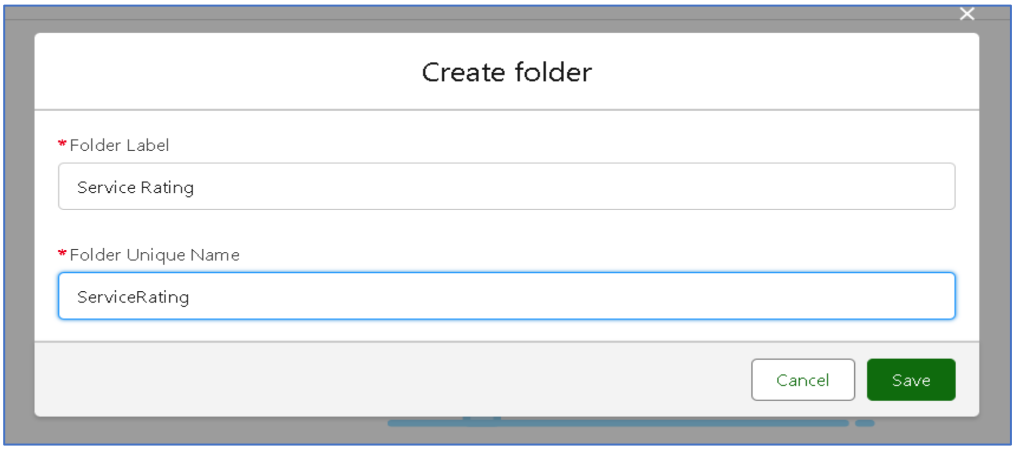
Dashboards

ACTIVITY – 1 :- Create Dashboard Folder

- Click on the app launcher and search for dashboard.
- Click on dashboard tab.

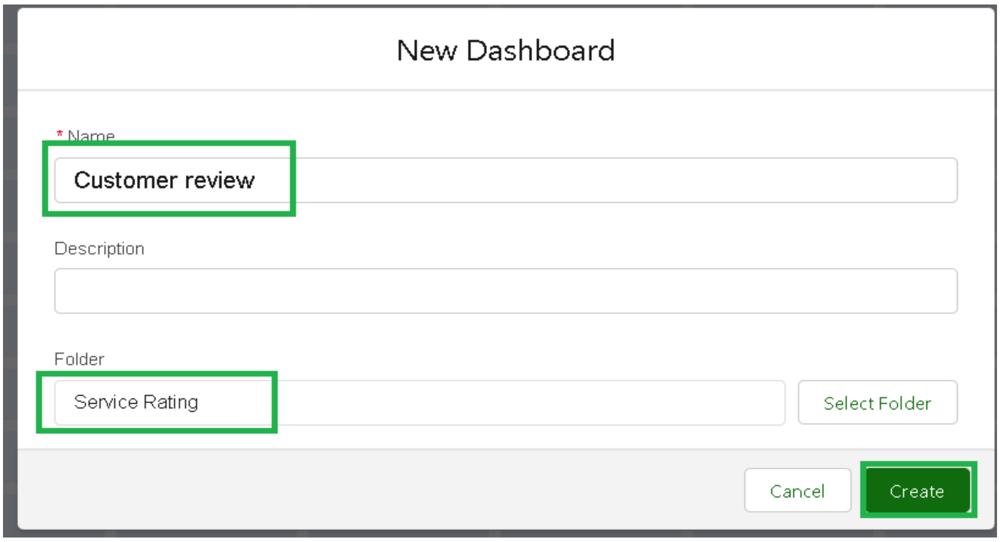


- Click new folder, give the folder label as " Service Rating dashboard".
- Folder unique name will be auto populated.
- Click save.

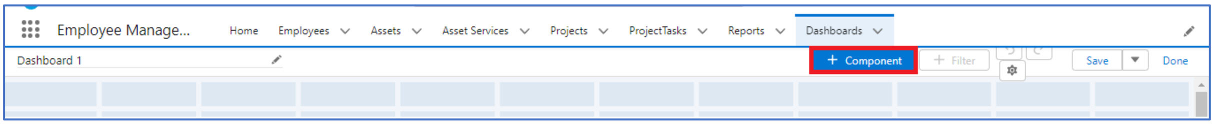


ACTIVITY – 2: Create Dashboard

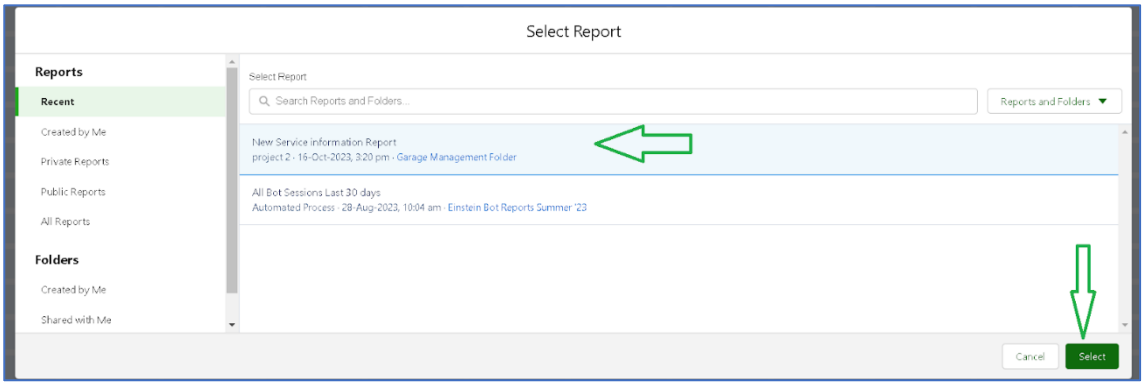
- Go to the app >> click on the Dashboards tabs.
- Give a Name and select the folder that created, and click on create.



- Select add component

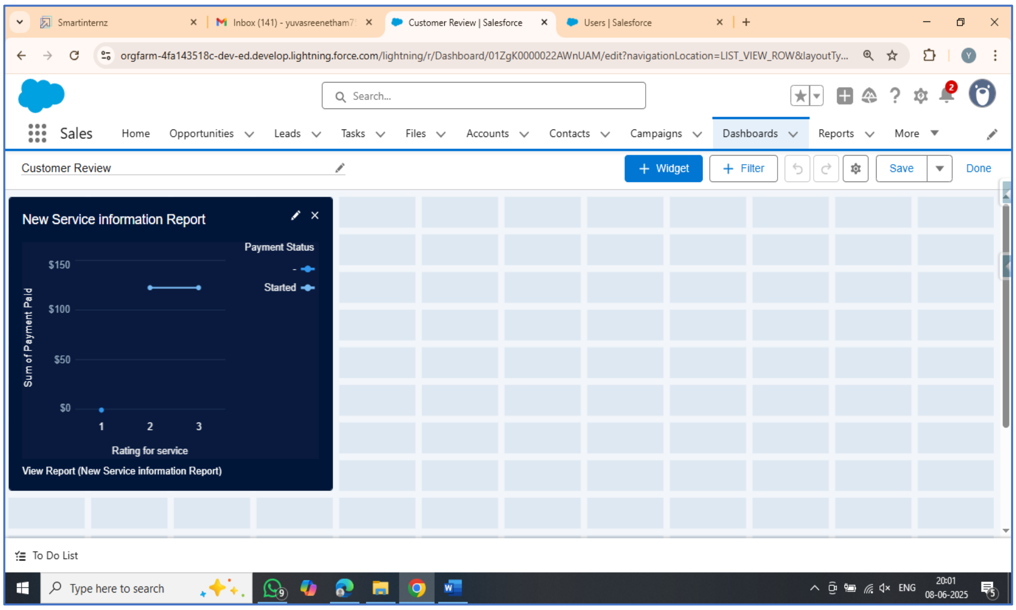


- Select a Report and click on select.



- Select the Line Chart. Change the theme.
- Click Add then click on Save and then click on Done.

- Preview is shown below.



GARAGE MANAGEMENT SYSTEM

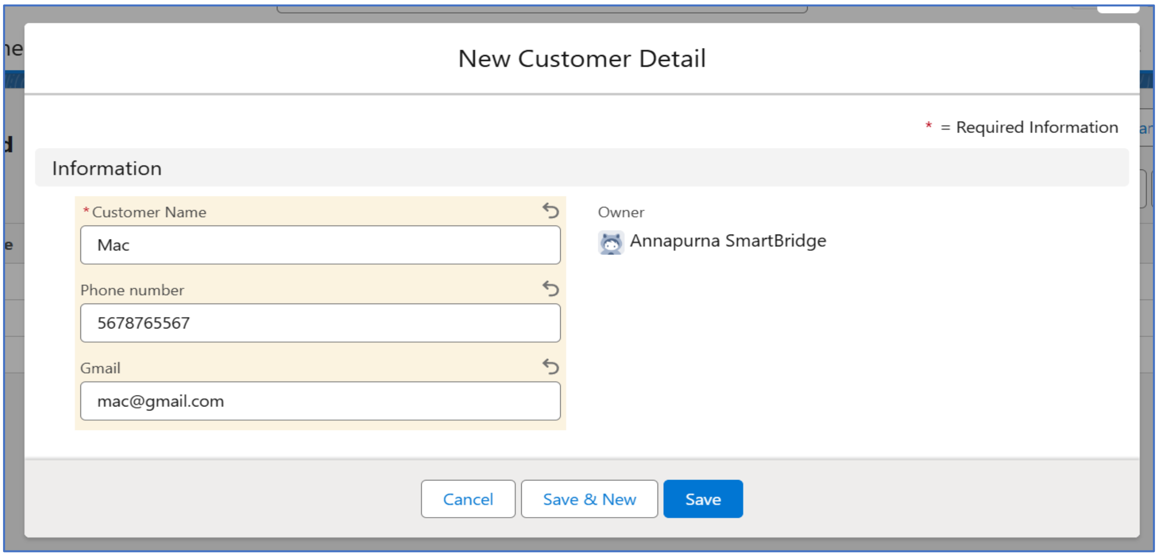
MILESTONE – 17

User Adoption

ACTIVITY – 1 : creating records

To create a record in the follow objects, follow these steps

- Click on the app launcher located at the left side of the screen.
- Search for "Garage Management" and click on it.
- Click on the "Consumer details tab".
- Click on new and fill the details as shown below figs, and click save.



Now, Create the Appointment Record

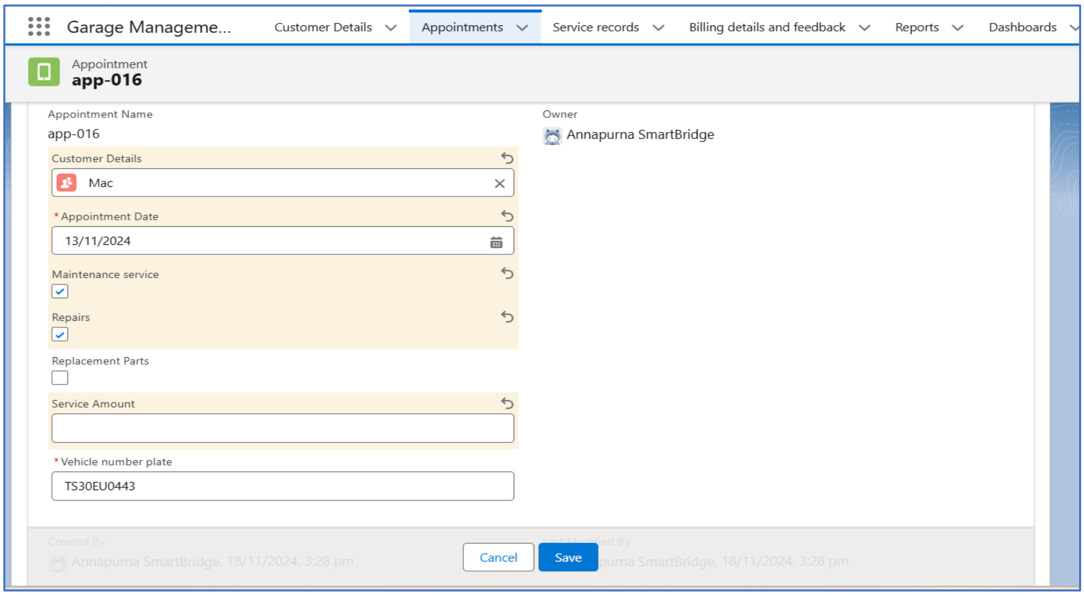
- Click on the "**Appointment** tab".

- Enter the customer details as created, while entering Appointment Date enter the date less than the created date.

- Match the validation while entering the vehicle number plate.

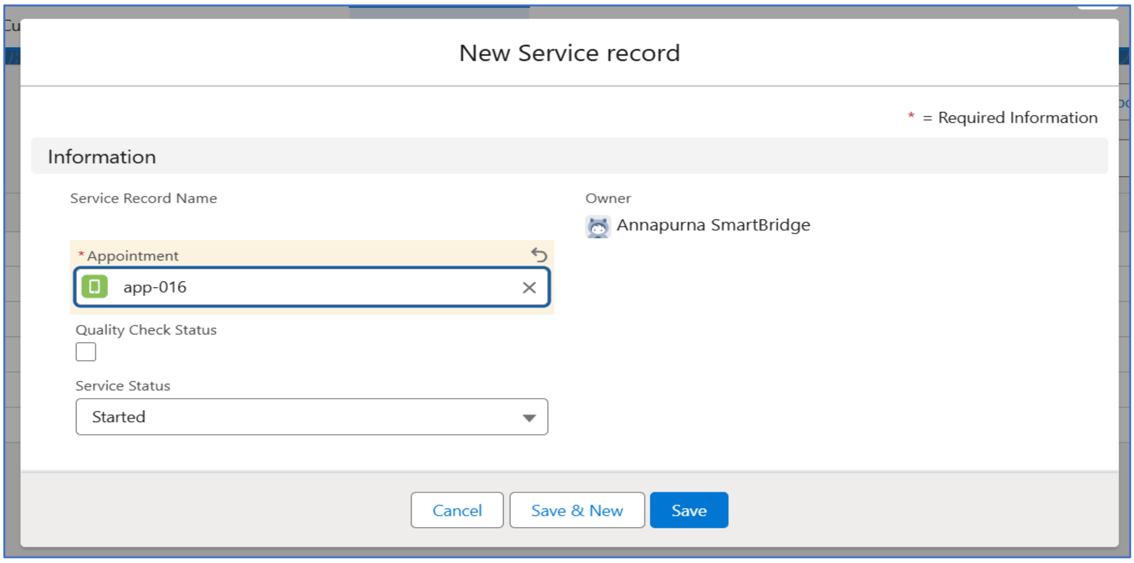
- Select the services you need.

- Click on save to see the Service Amount.



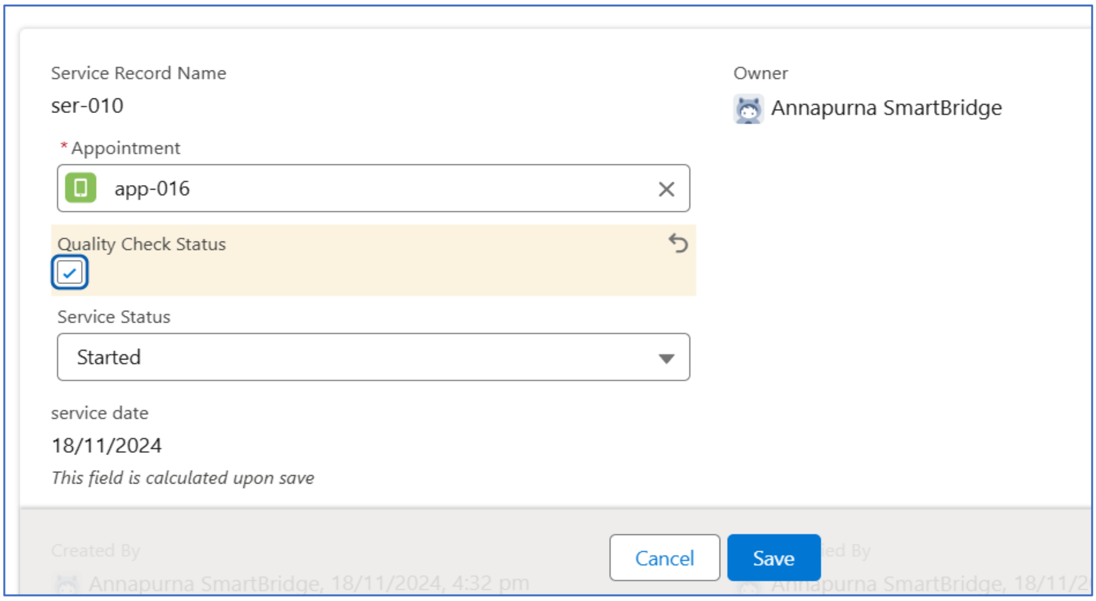
Now, Create a service Record

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

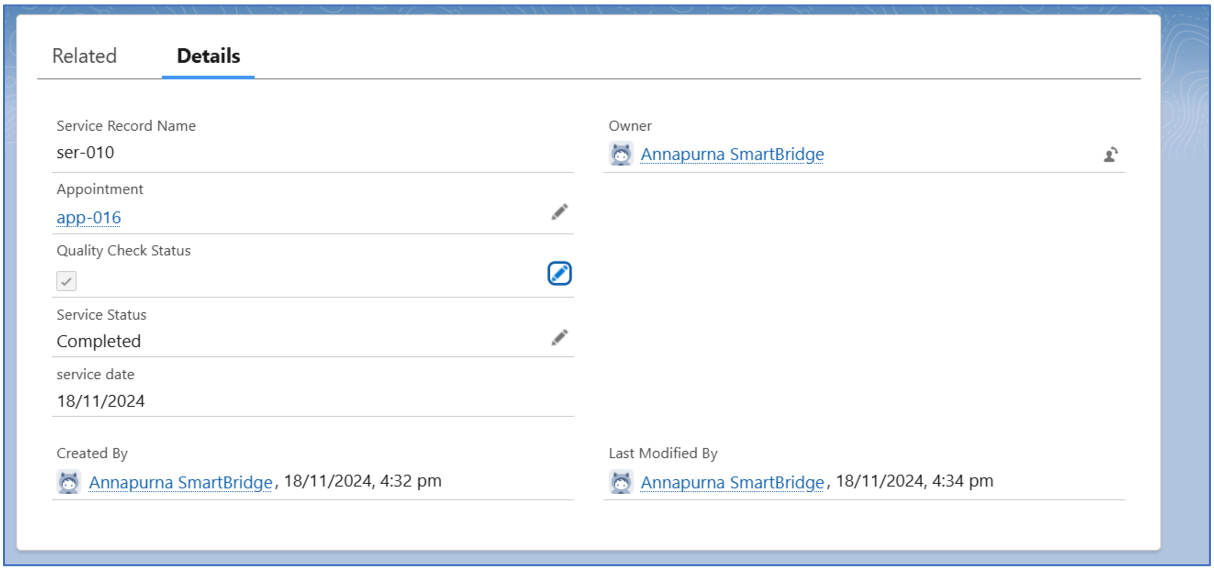


- Open the record and click on Quality check status as true.
- Click on save.

GARAGE MANAGEMENT SYSTEM

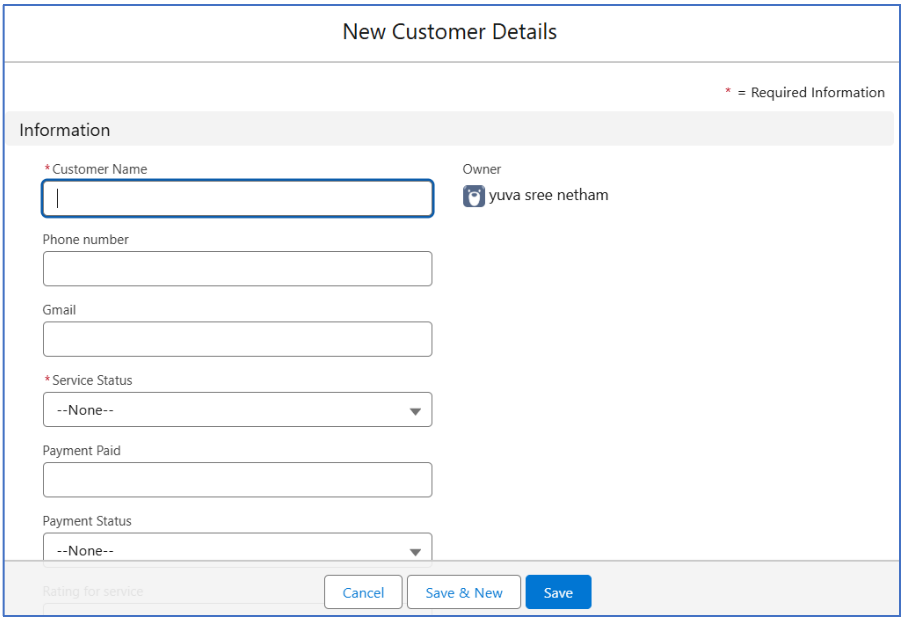


- Now automatically Service status will be moved to completed.

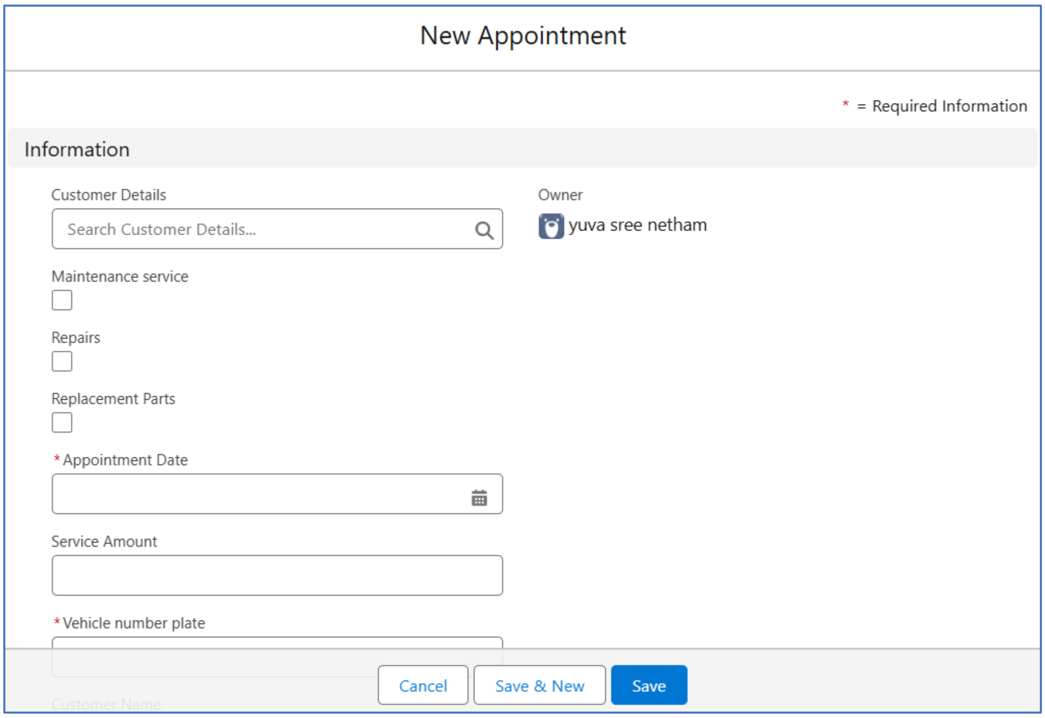


Outputs:

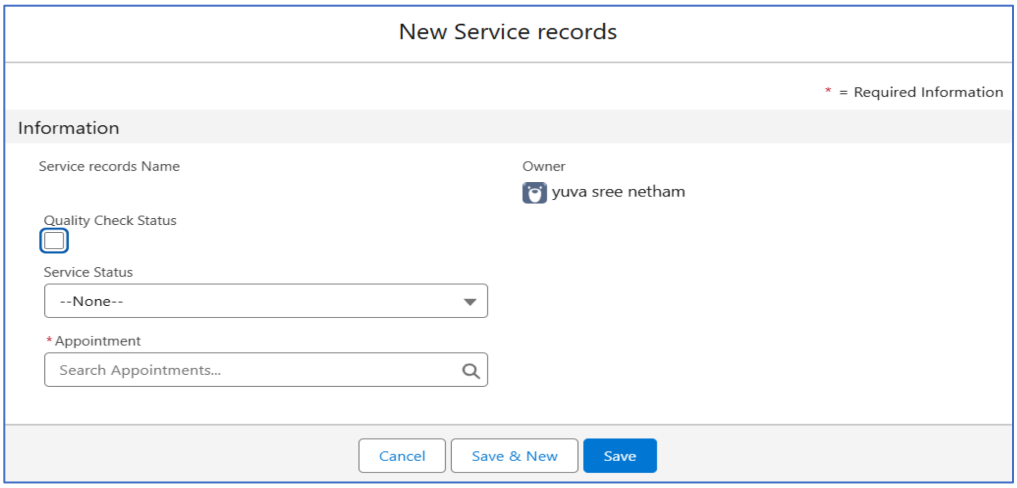
Customer Details:



Appointment:



Service Records:



Billing Details and Feedback: