

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/r9EX3IGde5k>

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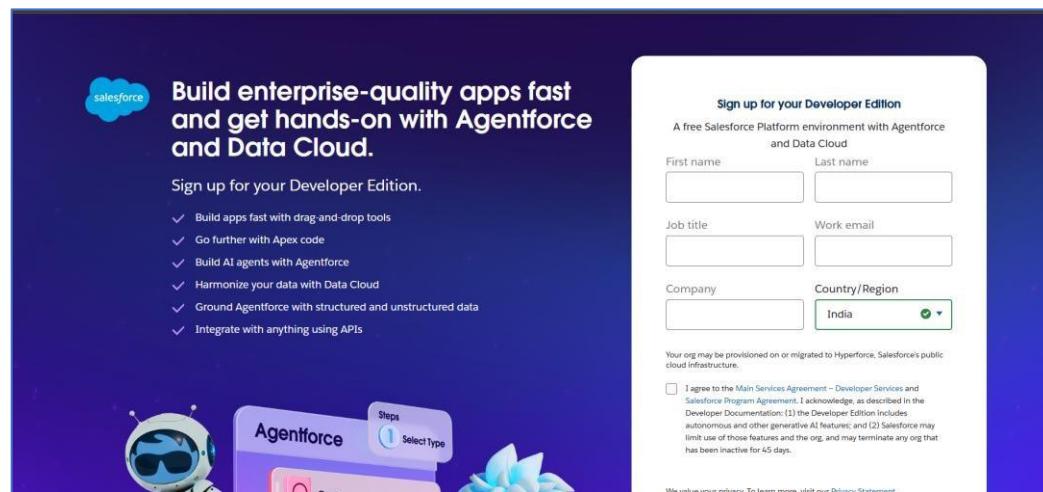
MILESTONE -1

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:



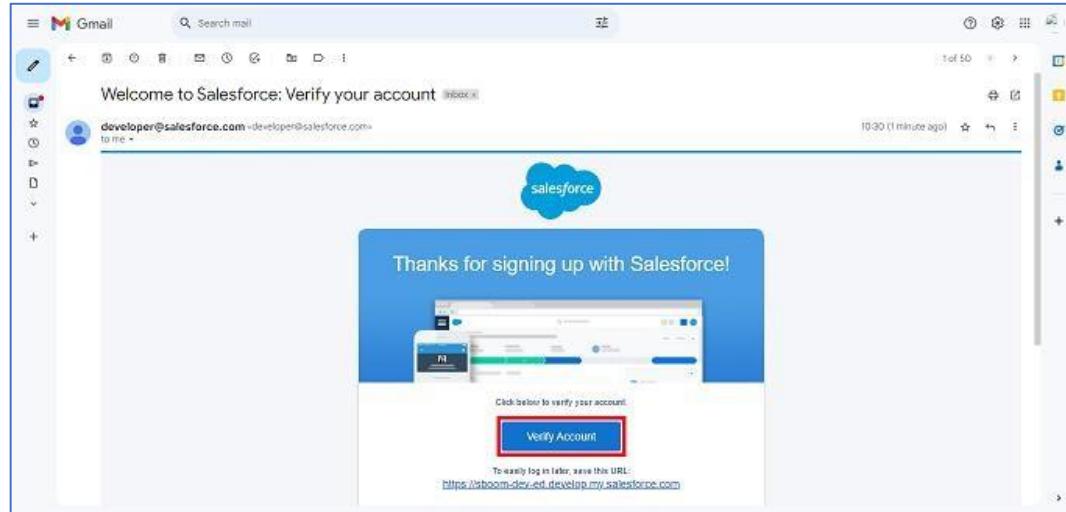
- **FIRST NAME:** nagooramma
- **LAST NAME:** singanamalli
- **JOB TITLE:** Developer
- **WORK EMAIL:** snagooramma05@email.com
- **COMPANY:** Gayatri Degree College Tirupati
- **COUNTRY/ REGION:** India

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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.

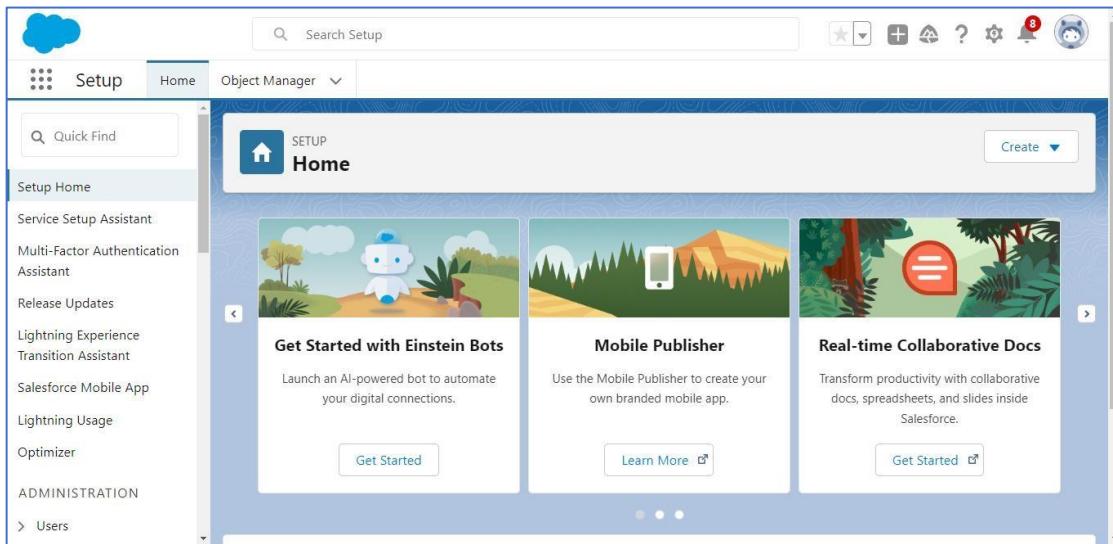


2. Click on Verify Account
3. Give a password and answer a security question and click on change password.

A screenshot of a "Change Your Password" page. It asks for a new password for lead@sb.com, specifying it must be at least 8 characters long, contain one letter, and one number. It includes fields for "New Password" and "Confirm New Password", both of which are highlighted with a red border. Below these are "Security Question" and "Answer" fields, also highlighted with a red border. A large blue "Change Password" button at the bottom is also highlighted with a red border.

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



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MILESTONE – 2

OBJECT

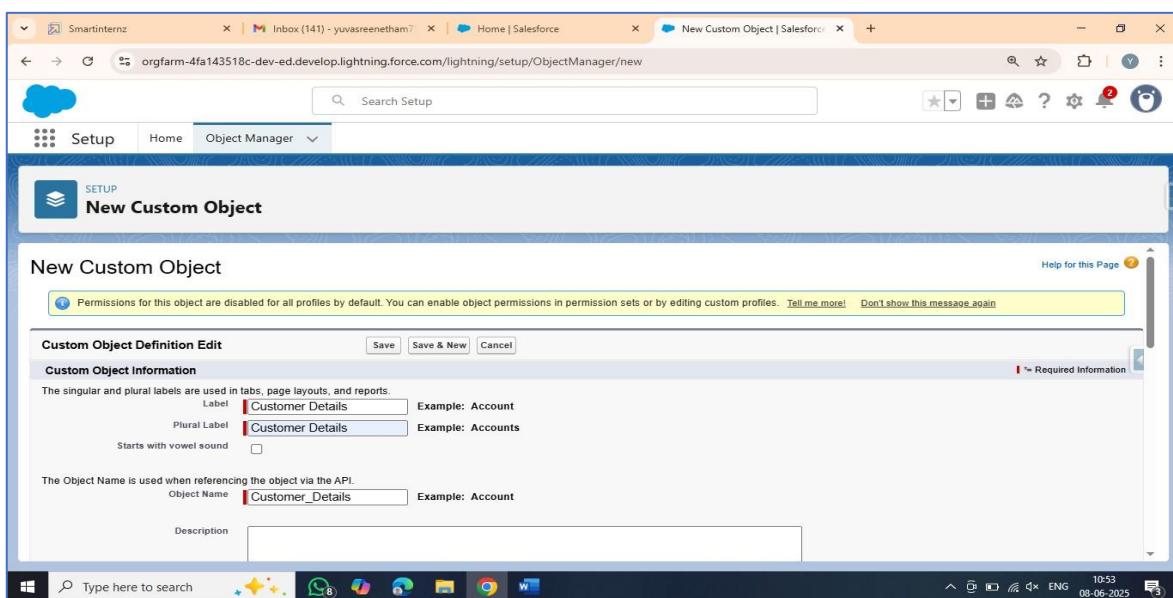
ACTIVITY – 1: Create Customer Details Object

To create an object:

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

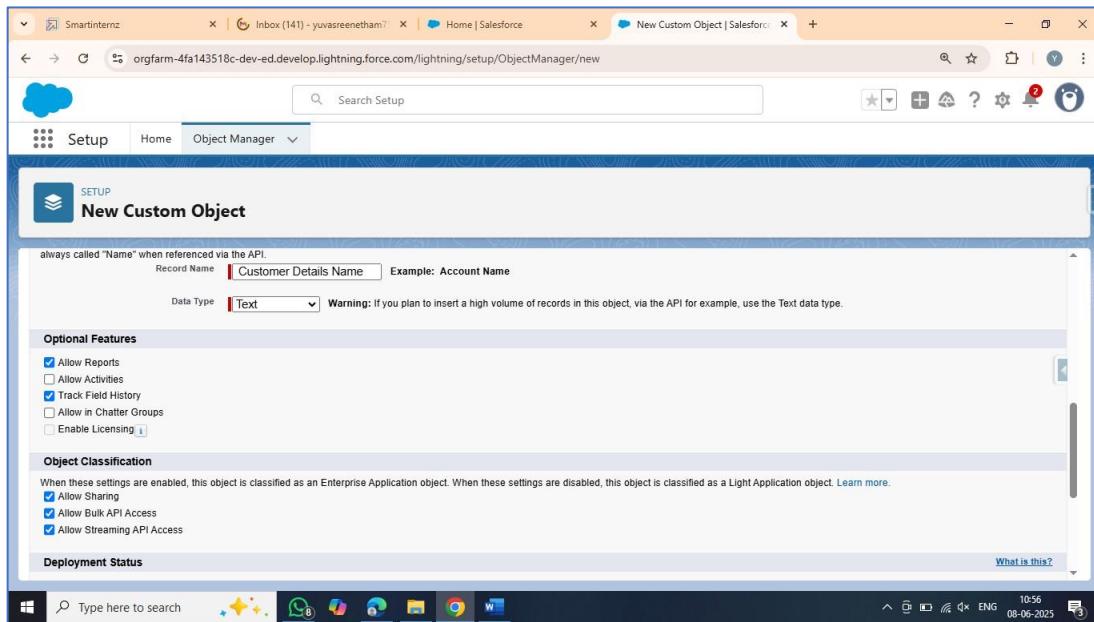


- Enter the label name >> Customer Details
- Plural label name >> Customer Details

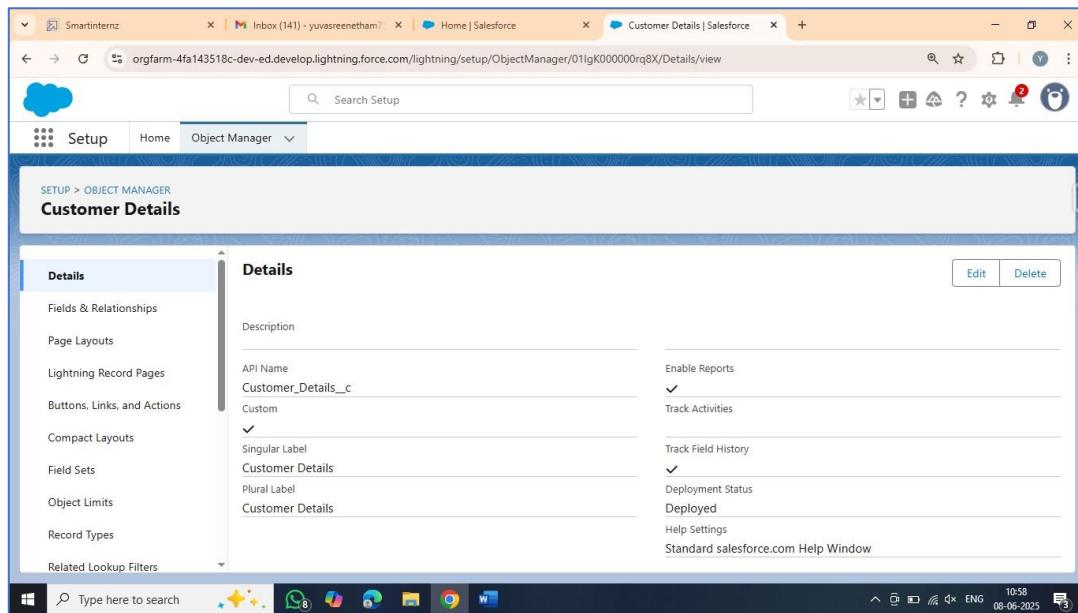


- Enter Record Name Label and Format
 - Record Name >> Customer Name
 - Data Type >> Text
- Click on Allow reports and Track Field History.

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7. Allow search >> Save.



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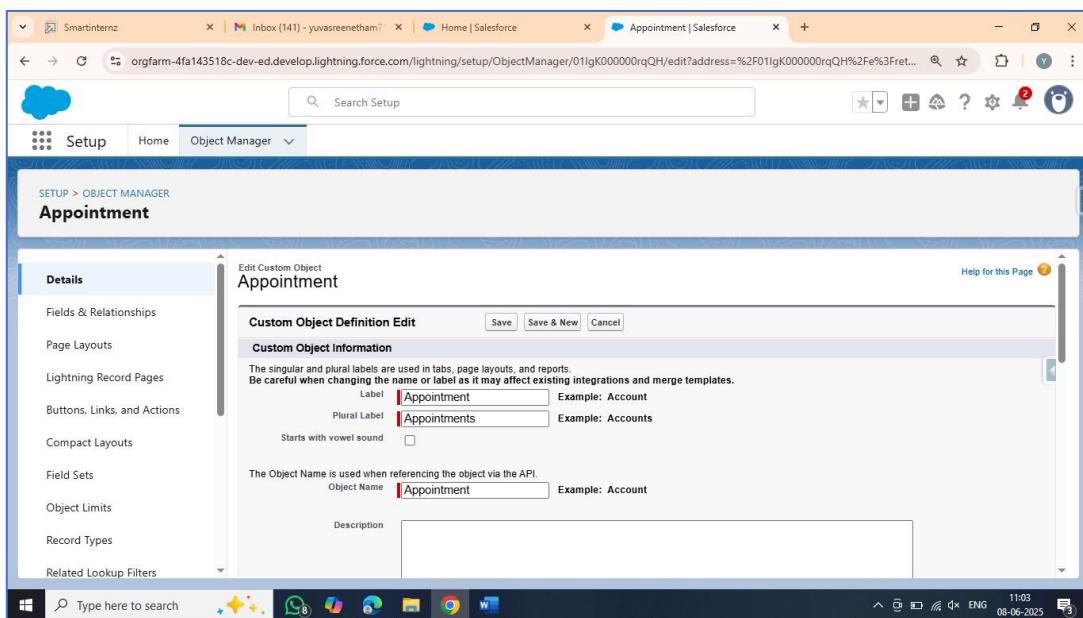
ACTIVITY – 2 : Create Appointment Object

To create an object:

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

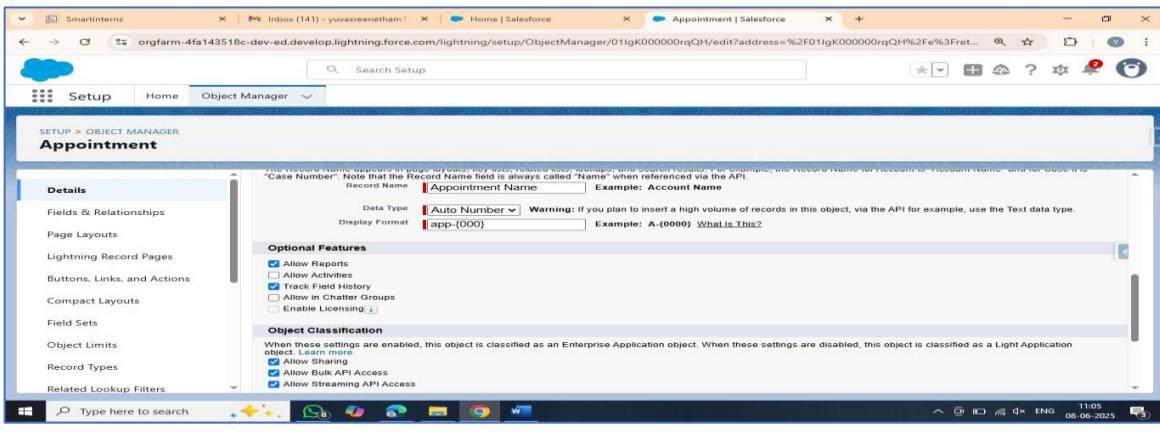


- Enter the label name >> Appointment
- Plural label name >> Appointments

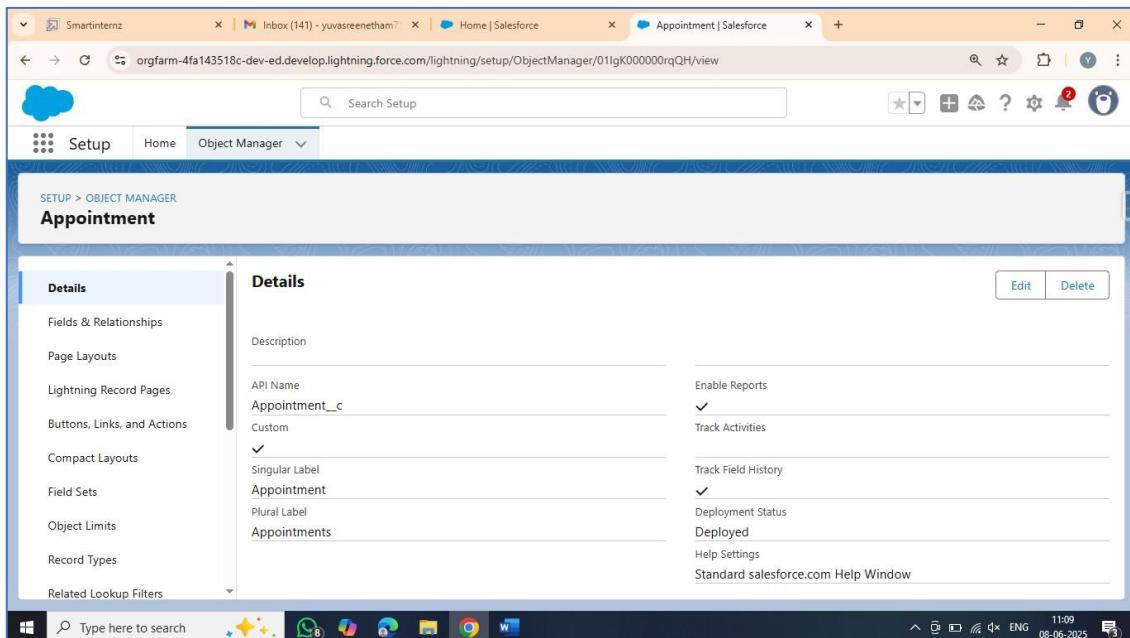
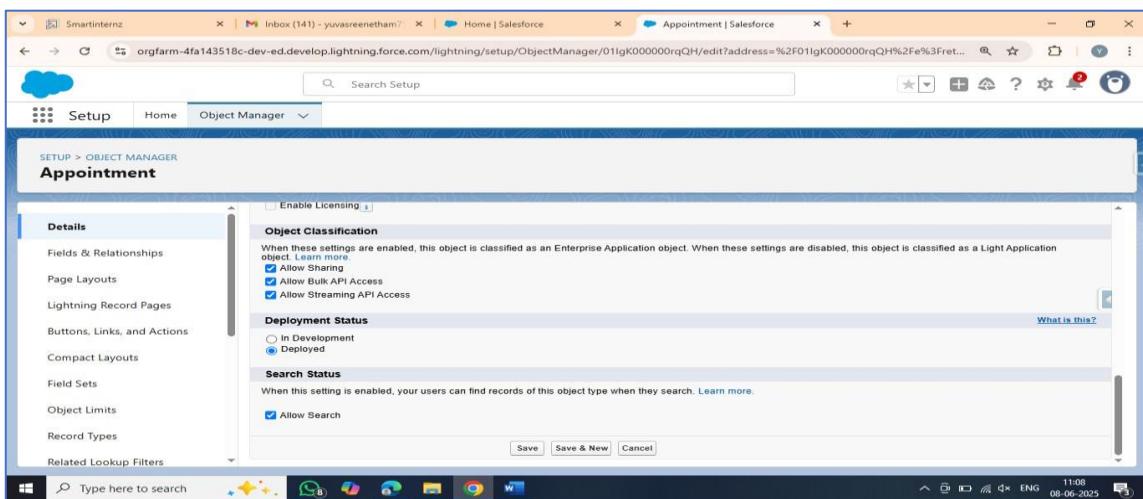


- Enter Record Name Label and Format
 - Record Name >> Appointment Name
 - Data Type >> Auto Number
 - Display Format >> app- {000}
 - Starting number >> 1
- Click on Allow reports and Track Field History.

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4. Allow search >> Save.



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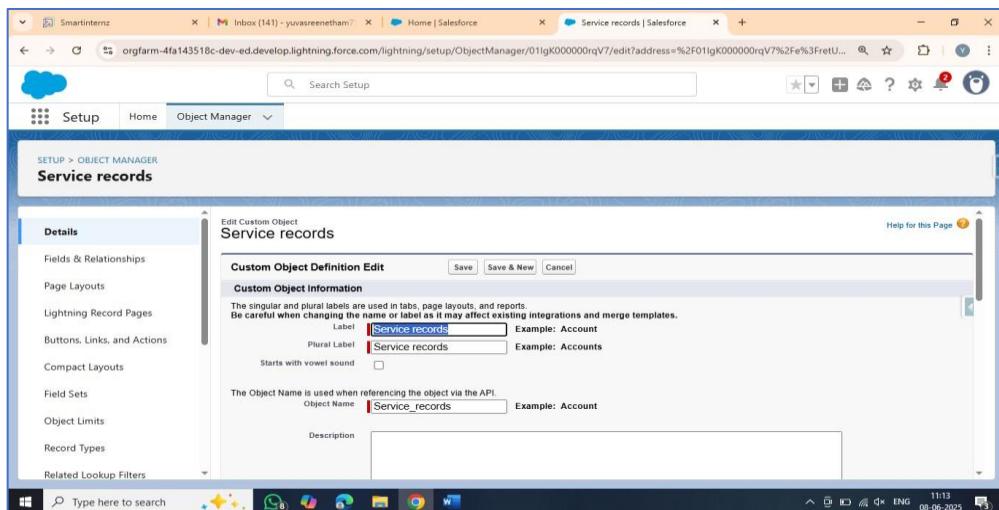
ACTIVITY -3 :- Create Service records Object

To create an object:

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

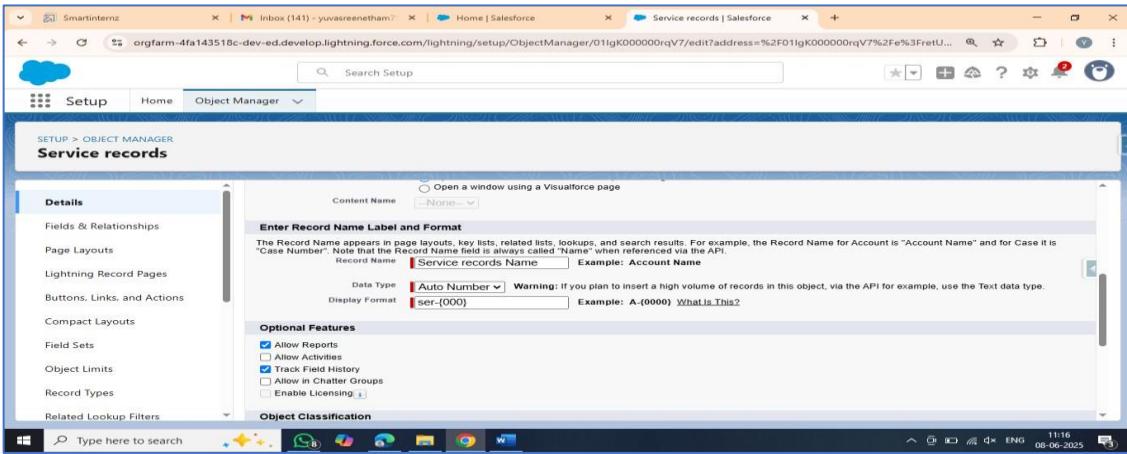


- Enter the label name >> Service records
- Plural label name >> Service records

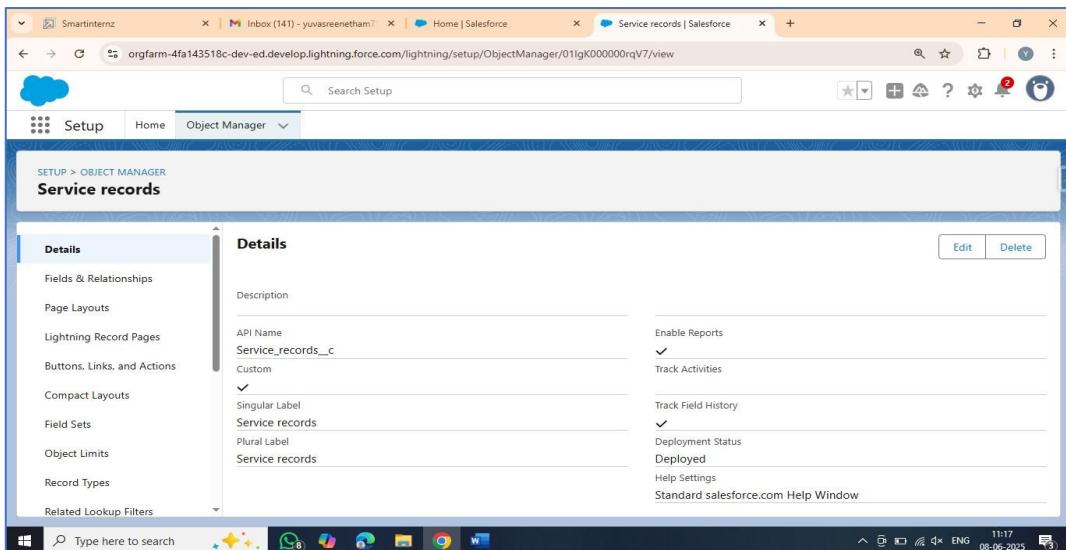
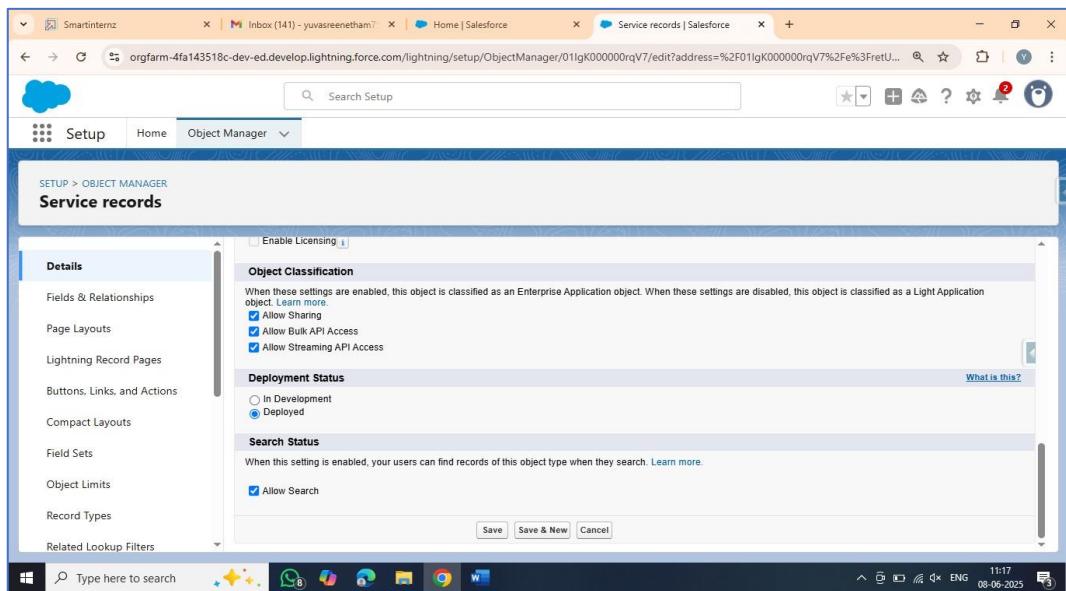


- Enter Record Name Label and Format
 - Record Name >> Service records Name
 - Data Type >> Auto Number
 - Display Format >> ser- {000}
 - Starting number >> 1
- Click on Allow reports and Track Field History,

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6. Allow search >> Save.



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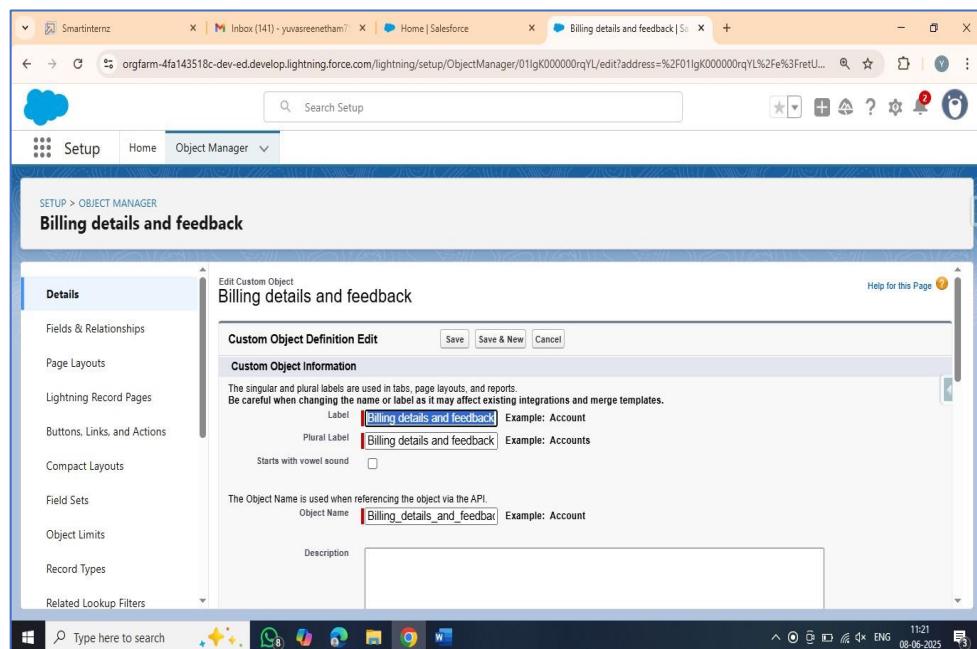
ACTIVITY – 4: Create Billing details and feedback Object

To create an object:

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

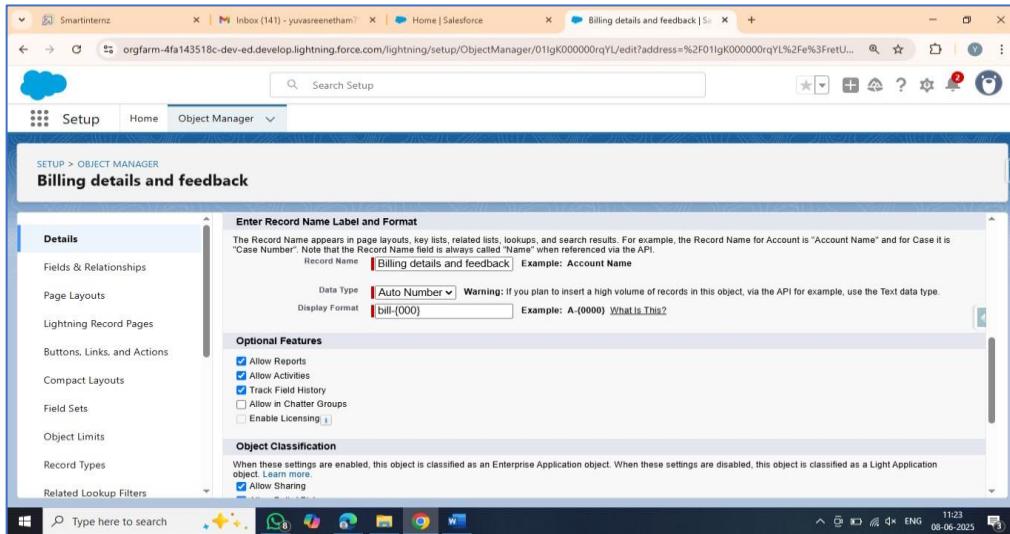


- Enter the label name >> Billing details and feedback
- Plural label name >> Billing details and feedback
- Enter Record Name Label and Format

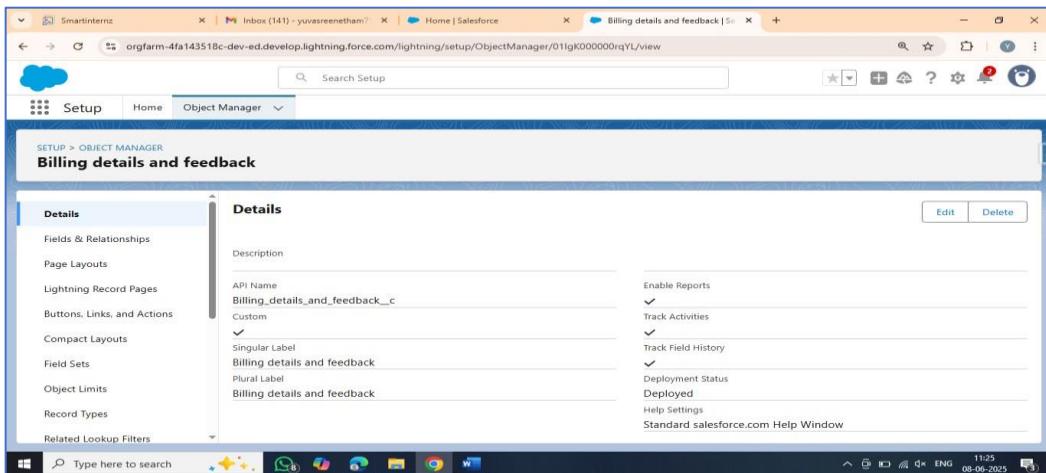
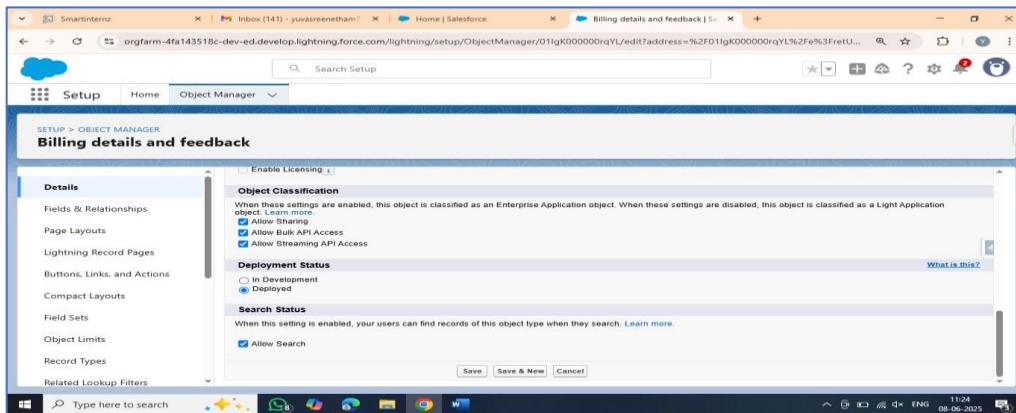


- Record Name >> Billing details and feedback Name
 - Data Type >> Auto Number
 - Display Format >> bill- {000}
 - Starting number >> 1
- Click on Allow reports and Track Field History,

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5. Allow search >> Save.



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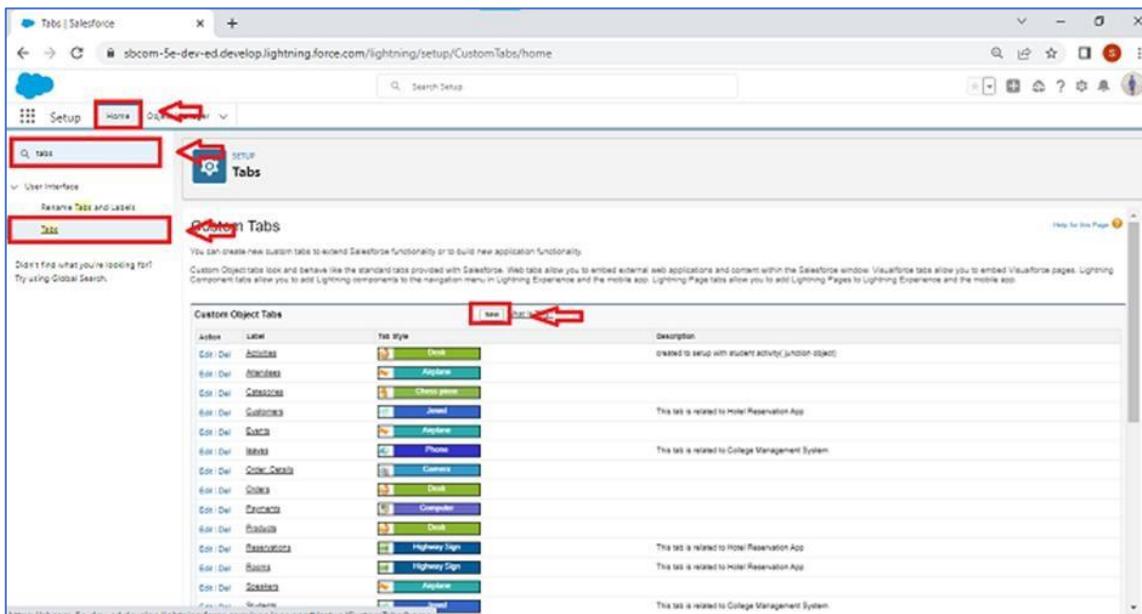
MILESTONE -3

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.

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Step 3. Add to Custom Apps

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

Custom App	<input type="checkbox"/> Include Tab
Platform (standard__Platform)	<input type="checkbox"/>
Sales (standard__Sales)	<input type="checkbox"/>
Service (standard__Service)	<input type="checkbox"/>
Marketing (standard__Marketing)	<input type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>

Analytics Studio (standard__Insights)

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

 Include Tab

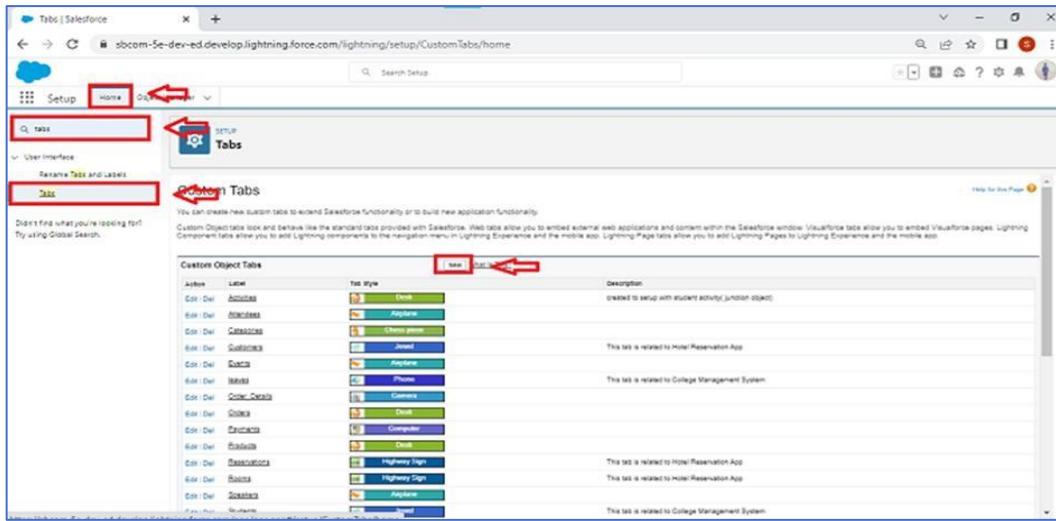
 Previous

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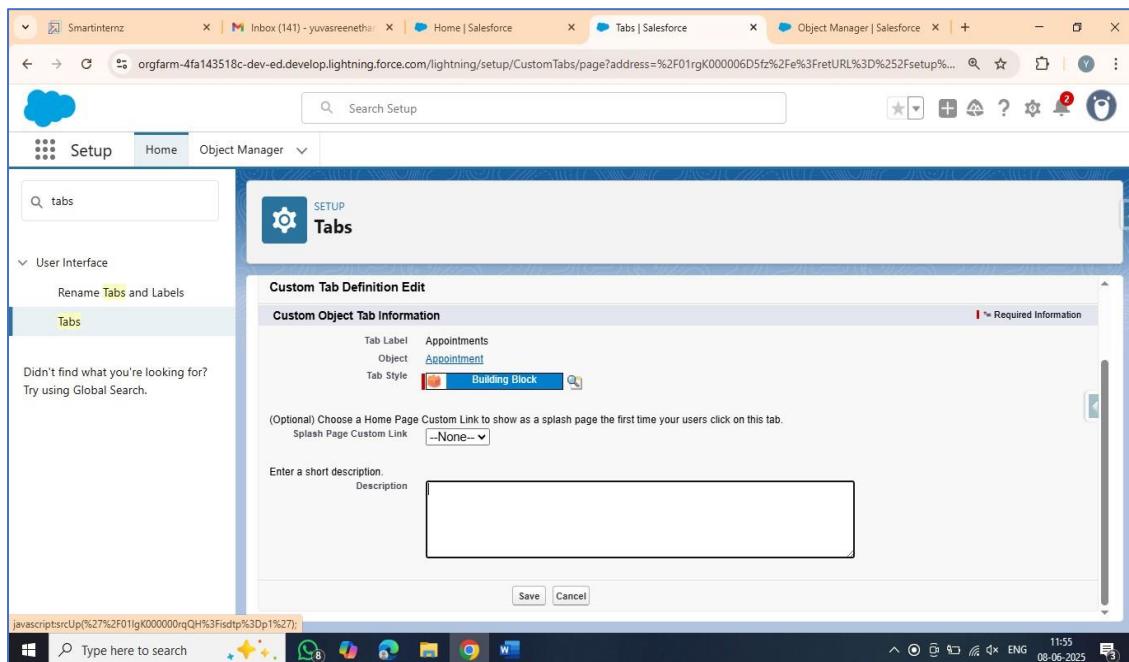
ACTIVITY – 2: Creating Remaining Tabs

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.

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Step 3. Add to Custom Apps

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

Custom App	<input type="checkbox"/> Include Tab
Platform (standard__Platform)	<input type="checkbox"/>
Sales (standard__Sales)	<input type="checkbox"/>
Service (standard__Service)	<input type="checkbox"/>
Marketing (standard__Marketing)	<input type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>

Analytics Studio (standard__Insights)	<input type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input type="checkbox"/>
Service Console (standard__LightningService)	<input type="checkbox"/>
Sales (standard__LightningSales)	<input type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input type="checkbox"/>
Queue Management (standard__QueueManagement)	<input type="checkbox"/>
Bolt Solutions (standard__LightningBolt)	<input type="checkbox"/>
Data Manager (standard__DataManager)	<input type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>

Append tab to users' existing personal customizations

→ ↓

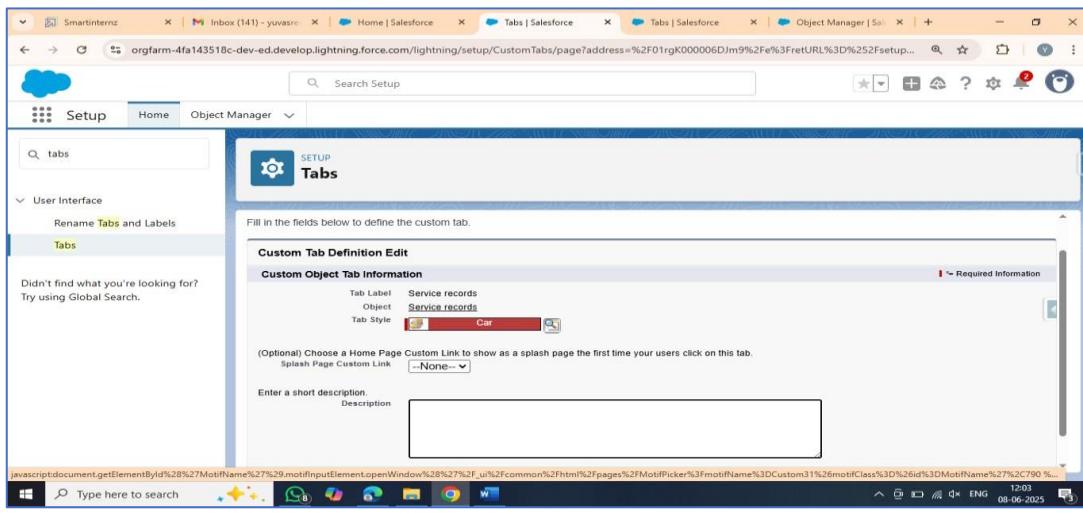
Previous Save Cancel

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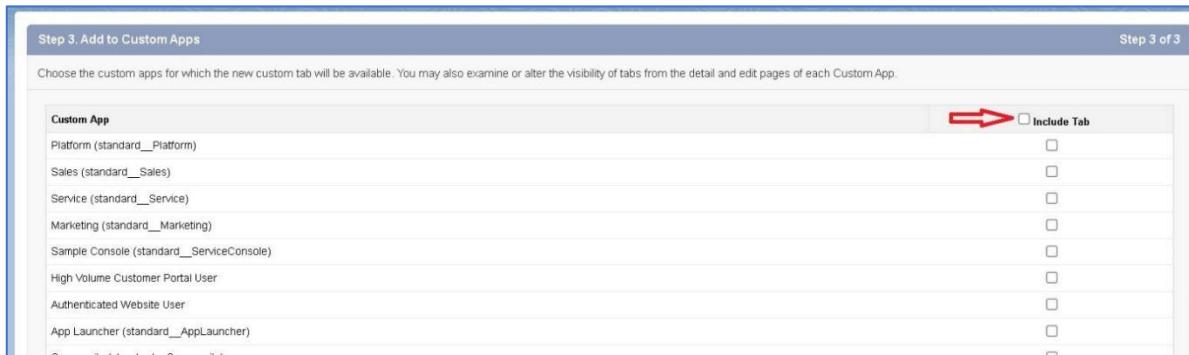
ACTIVITY -3 :- SERVICE RECORDS

To create a Tab:(Service records)

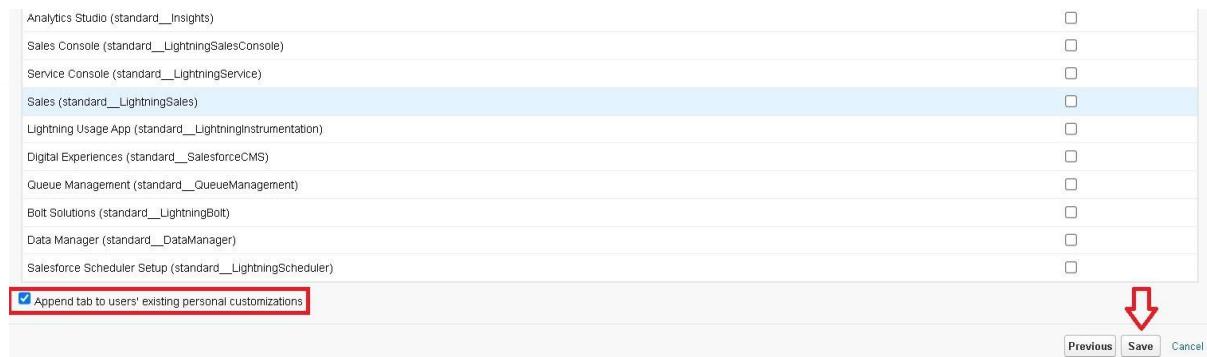
- Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
- Select Object (Service records) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab.



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



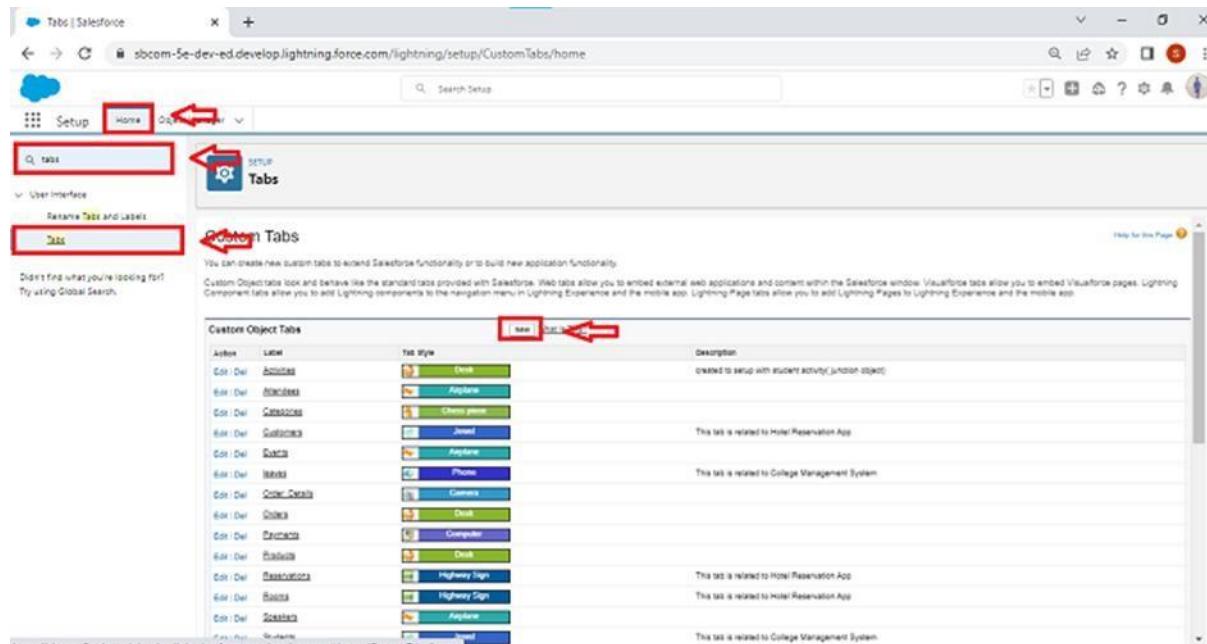
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ACTIVITY – 4:- BILLING DETAILS AND FEEDBACK

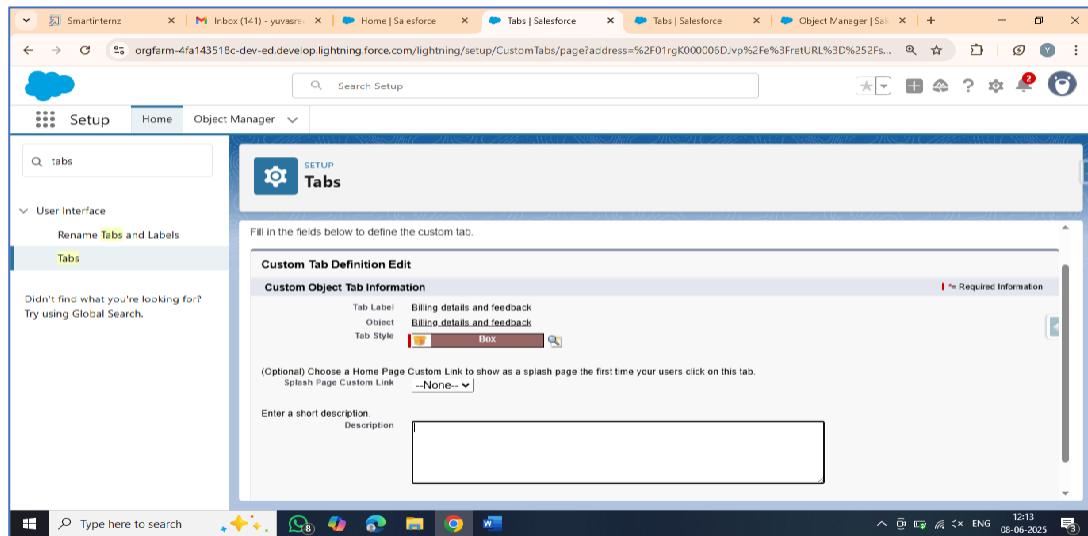
To create a Tab:(Billing details feedback)

- 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.

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

Step 3. Add to Custom Apps

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

Custom App	<input type="checkbox"/> Include Tab
Platform (standard__Platform)	<input type="checkbox"/>
Sales (standard__Sales)	<input type="checkbox"/>
Service (standard__Service)	<input type="checkbox"/>
Marketing (standard__Marketing)	<input type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>

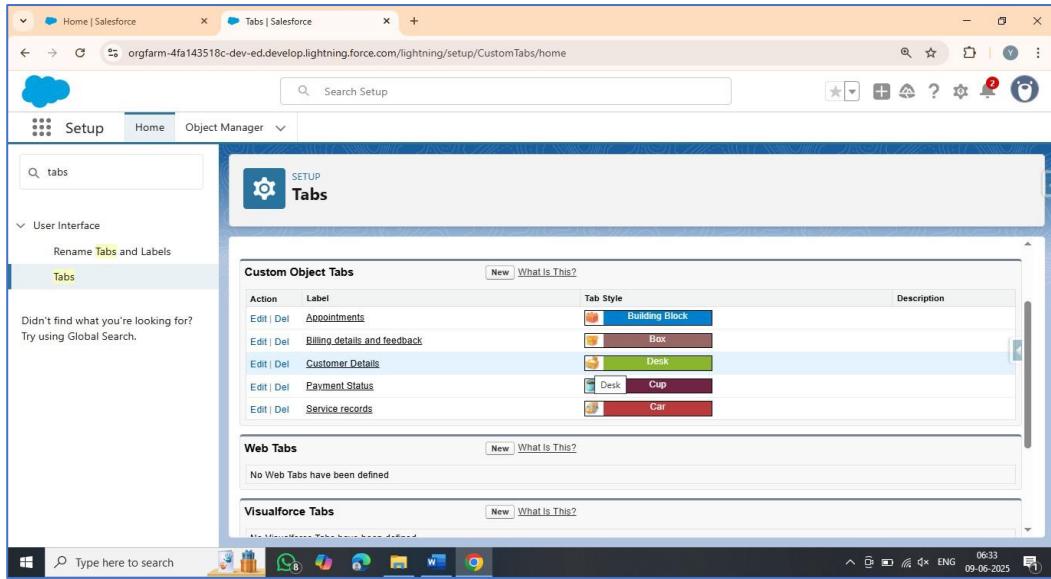
Step 3. Add to Custom Apps

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

Custom App	<input type="checkbox"/> Include Tab
Analytics Studio (standard__Insights)	<input type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input type="checkbox"/>
Service Console (standard__LightningService)	<input type="checkbox"/>
Sales (standard__LightningSales)	<input type="checkbox"/>
Lightning Usage App (standard__LightningInstrumentation)	<input type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input type="checkbox"/>
Queue Management (standard__QueueManagement)	<input type="checkbox"/>
Bolt Solutions (standard__LightningBolt)	<input type="checkbox"/>
Data Manager (standard__DataManager)	<input type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>
<input checked="" type="checkbox"/> Append tab to users' existing personal customizations	<input type="checkbox"/>

Previous **Save** **Cancel**

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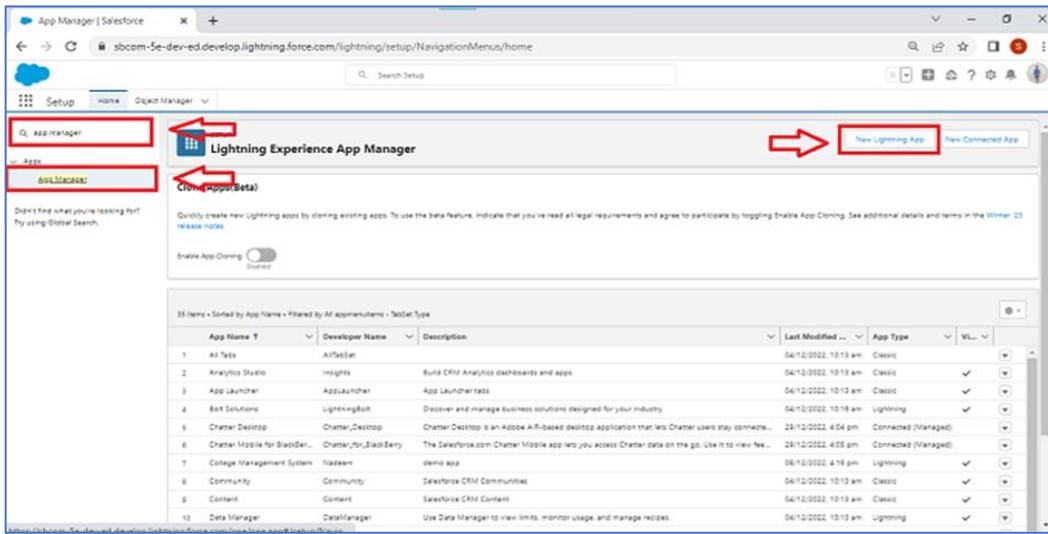
GARAGE MANAGEMENT SYSTEM

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.



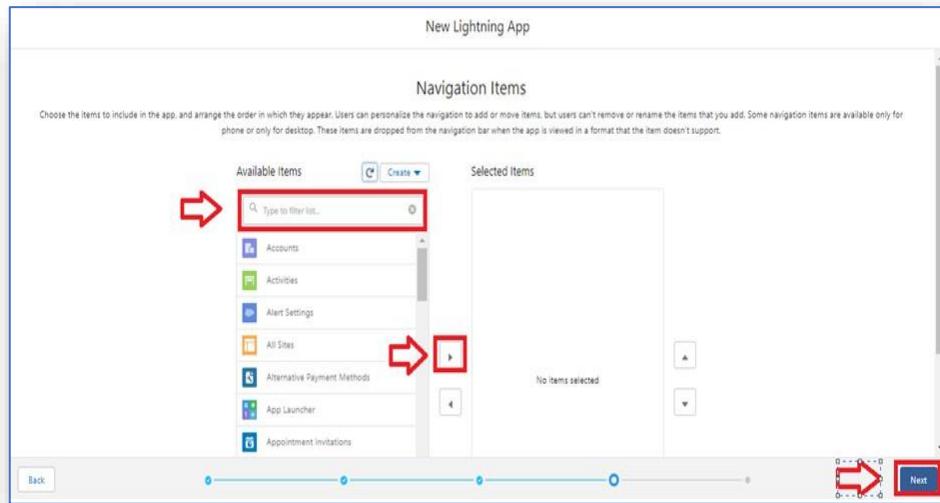
- Fill the app name in app details as Garage Management Application >> Next >> (App option page) keep it as default >> Next >> (Utility Items) keep it as default >> Next.

The screenshot shows the 'New Lightning App' configuration page. The title is 'New Lightning App'. The main section is 'App Details & Branding'. It includes fields for 'App Name' (with a red arrow pointing to the input field), 'Developer Name', 'Description', 'Image' (with an 'Upload' button), and 'Primary Color Hex Value' (#007002). Below these are 'Org Theme Options' and 'App Launcher Preview'. At the bottom right, there is a red arrow pointing to the 'Next' button.

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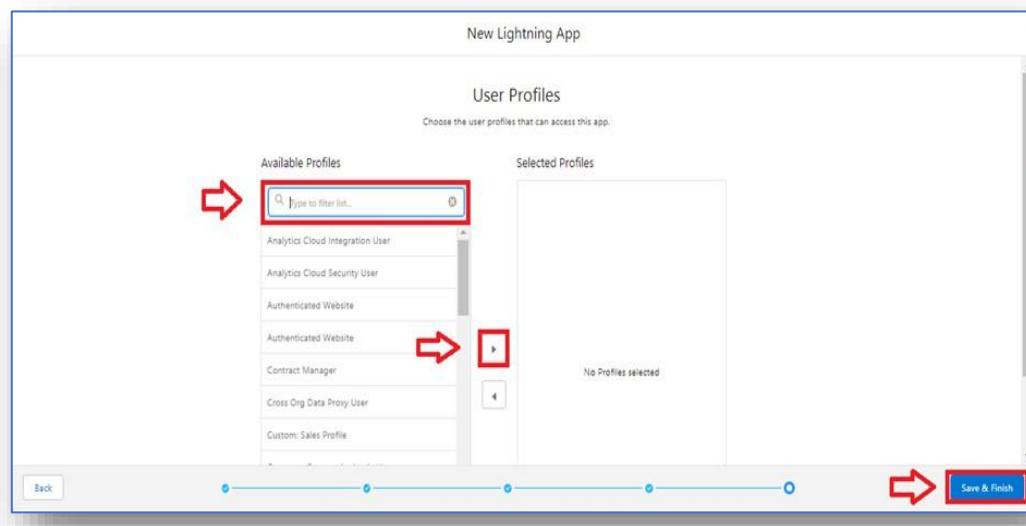
To Add Navigation Items:

- 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.



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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.

The screenshot shows the Salesforce Object Manager interface. At the top, there is a search bar with the text 'cus'. Below it, a table lists objects: 'Customer' (Standard Object) and 'Customer Details' (Custom Object). The 'Customer Details' row is highlighted with a red border. The table has columns for Label, API Name, Type, Description, Last Modified, and Deployed.

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

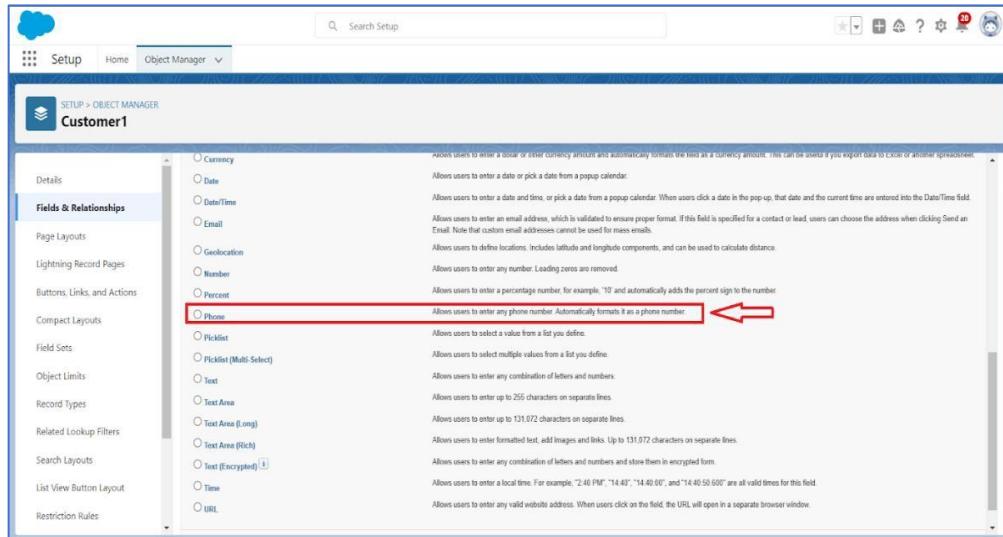
- Now click on "Fields & Relationships" >> New

The screenshot shows the 'Customer' object's Fields & Relationships page. On the left, a sidebar lists various setup items like Details, Fields & Relationships, Page Layouts, etc. The 'Fields & Relationships' item is selected and highlighted with a red box. In the main area, there is a table titled 'Fields & Relationships' with columns for FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. A red arrow points to the 'New' button at the top right of the table. Another red box highlights the 'Fields & Relationships' link in the sidebar.

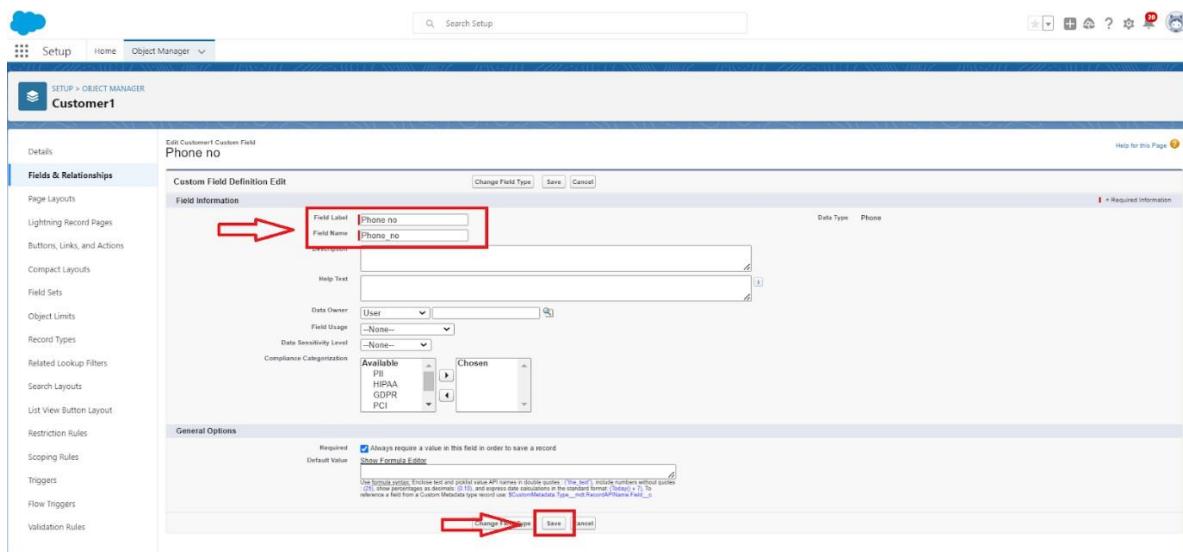
FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	Lookup(User)		
current_Status	Picklist		
Customer Name	Name	Text(80)	✓
Email Id	Email (Unique)		✓
Last Modified By	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)	✓
Permanent Address	Permanent_Address__c	Text Area(255)	
Phone no	Phone_no__c	Phone	

- Select Data Type as a "Phone"

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- Click on next.
- Fill the Above as following:
 - Field Label: Phone number
 - Field Name : gets auto generated
 - Click on Next > Next > Save and new.



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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.

The screenshot shows the Salesforce Object Manager interface. A search bar at the top contains the text "cus". Below it is a table with columns: Label, API Name, Type, Description, Last Modified, and Deployed. Two rows are listed: "Customer" (Standard Object) and "Customer Details" (Custom Object). The "Customer Details" row is highlighted with a red border. The "Customer" row is also partially visible with a red border around its first three columns.

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

The screenshot shows the "Fields & Relationships" section for the "Customer1" object. On the left, there's a sidebar with options like Details, Fields & Relationships (which is selected and highlighted with a red box), Page Layouts, etc. The main area lists various fields with their field names, data types, and descriptions. A red arrow points to the "New" button at the top right of the list table. Another red arrow points to the "Customer1" object name in the title bar.

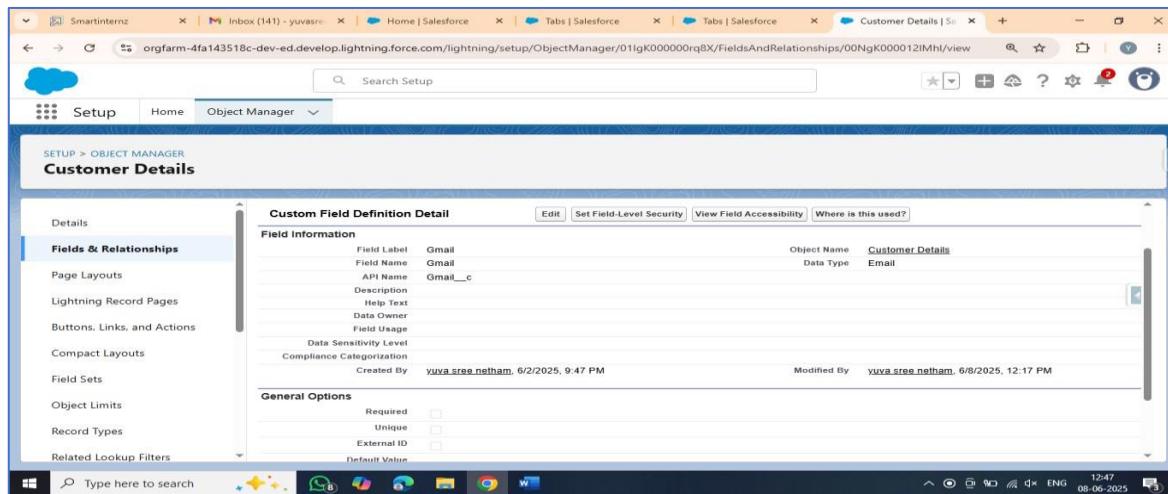
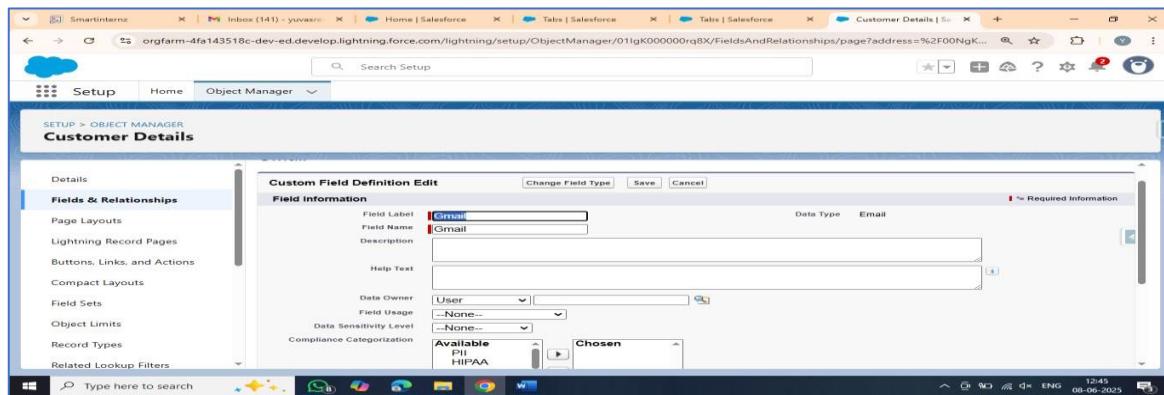
- Select Data Type as a "Email"

The screenshot shows the "Customer Details" object's field definition page. The left sidebar shows "Fields & Relationships" selected. The main area displays a list of field types with their descriptions. The "Phone" field type is selected and highlighted with a red box. A large portion of the right side of the screen is occupied by the detailed description of the "Phone" field type, which includes information about its usage and validation rules.

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

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



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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.

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes 'Setup', 'Home', 'Object Manager', a search bar ('Q app'), 'Schema Builder', and a 'Create' button. Below the header, the title 'Object Manager' is displayed with a green icon. A sub-header indicates '7 Items. Sorted by Label'. The main table lists four objects: 'Appointment' (API Name: Appointment__c, Type: Custom Object), 'Appointment Category' (API Name: AppointmentCategory, Type: Standard Object), 'Appointment Invitation' (API Name: AppointmentInvitation, Type: Standard Object), and 'Appointment Invitee' (API Name: AppointmentInvitee, Type: Standard Object). The 'Appointment' row is highlighted with a red border.

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

The screenshot shows the 'Appointment' object details in the Object Manager. The left sidebar has tabs for 'Details', 'Fields & Relationships' (which is selected and highlighted with a red border), 'Page Layouts', 'Lightning Record Pages', and 'Buttons, Links, and Actions'. The main area is titled 'Fields & Relationships' with a sub-header '14 Items. Sorted by Field Label'. It contains a table with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. Two fields are listed: 'Appointment Date' (Appointment_Date__c, Date type, no controlling field, indexed) and 'Appointment Name' (Name, Auto Number type, no controlling field, indexed). A 'New' button is highlighted with a red box at the top right of the table.

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

The screenshot shows the 'Data Type' configuration screen. At the top, it says 'Specify the type of information that the custom field will contain.' Below is a 'Data Type' section with several options:

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

 The 'Lookups Relationship' option is highlighted with a red circle and a red arrow points to it from the previous screenshot. The 'next' button is visible at the bottom right.

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

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➤ **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.

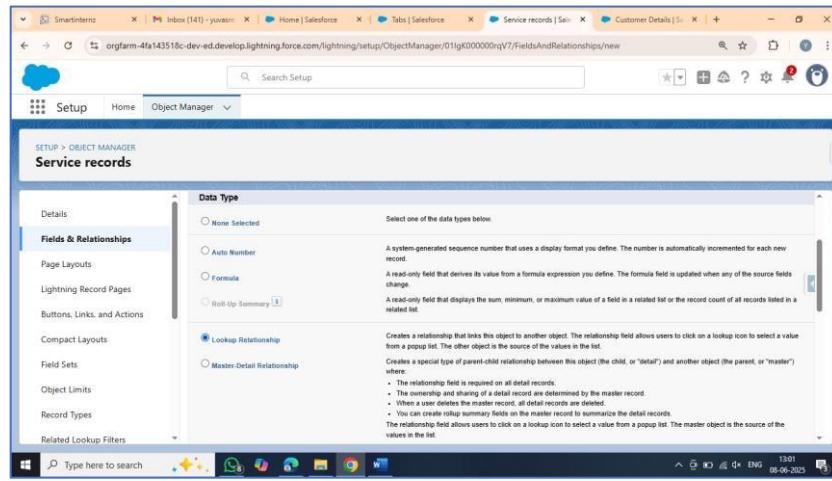
The screenshot shows the Salesforce Object Manager interface. In the search bar at the top right, 'SERV' is typed. Below the search bar, there's a table with columns: LABEL, API NAME, TYPE, and DESCRIPTION. One row in the table is highlighted for 'Service records'. To the right of the table, there's a schema builder interface with tabs for 'ED' (Edit) and 'DEPLOYED'. A status message 'SERVICE' is shown with a dropdown arrow.

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

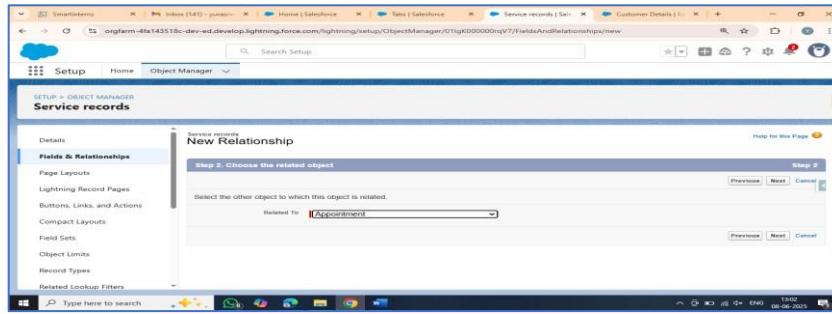
The screenshot shows the 'Fields & Relationships' section of the 'Service records' object. On the left, there's a sidebar with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The main area displays a table titled 'Fields & Relationships' with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. Several fields are listed, such as 'Appointment', 'Created By', 'Last Modified By', 'Owner', 'Quality Check Status', 'service date', and 'service_date__c'. At the top of the table, there are buttons for 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'.

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

GARAGE MANAGEMENT SYSTEM



- Select the related object "Appointment" and click next.

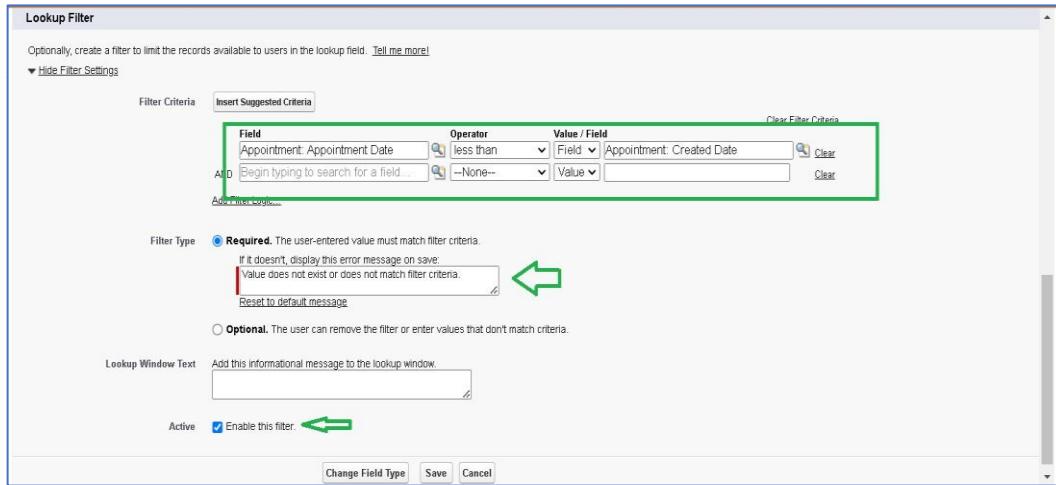


- Make it a required field so click on Required.



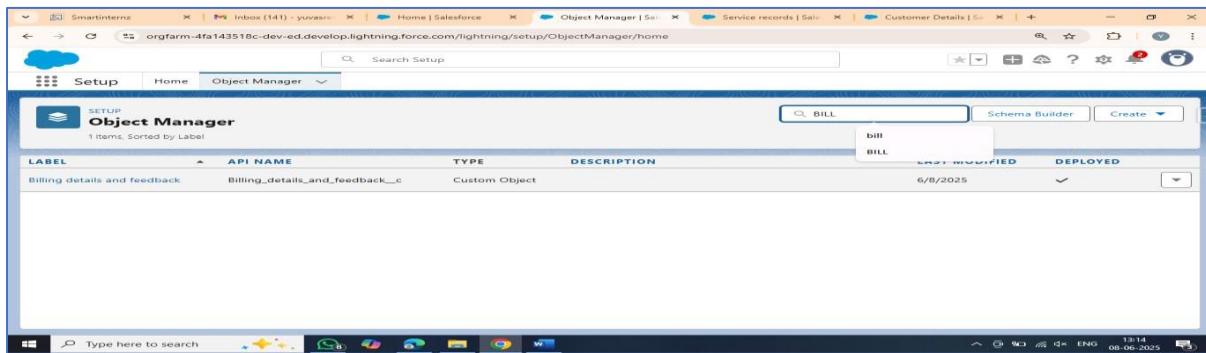
- Scroll down for Lookup Filter and click on Show filter settings.
- Now add the filter criteria.
- Field: Appointment: Appointment Date >> Operator: less than >> select field >> Appointment: Created Date
- Filter type should be Required.
- Error Message: Value does not match the criteria.
- Enable the filter by click on Active.
- Next >> Next >> Save.

GARAGE MANAGEMENT SYSTEM

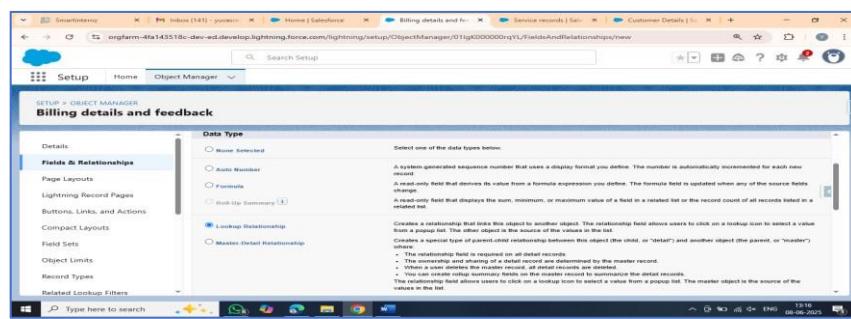


Creation of Lookup Field on Billing details and feedback Object:

- 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.

SETUP > OBJECT MANAGER

Appointment

Details

Fields & Relationships

Data Type

None Selected

Select one of the data types below.

Auto Number

A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

Formula

A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Roll Up Summary

A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

Lookup Relationship

Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The other object is the source of the values in the list.

Master Detail Relationship

Creates a relationship of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The master object is required to be present.
- The relationship field is required to be an all-list records.
- When a user creates the master record, all detail records are added.
- The master object is the source of the values in the list.
- The relationship field allows users to click on a lookup icon to select a value from a pop-up list. The master object is the source of the values in the list.

External Lookup Relationship

Allows users to select a True (checked) or False (unchecked) value.

Allows users to enter a value or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another application.

Next **CANCEL**

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

Appointment
New Custom Field

Help for this Page 

Step 2. Enter the details Step 2 of 4

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



Field Label	<input type="text" value="Maintenance service"/> 
Default Value	<input type="radio"/> Checked  <input checked="" type="radio"/> Unchecked 
Field Name	<input type="text" value="Maintenance_service"/> 
Description	<input type="text"/>
Help Text	<input type="text"/>

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

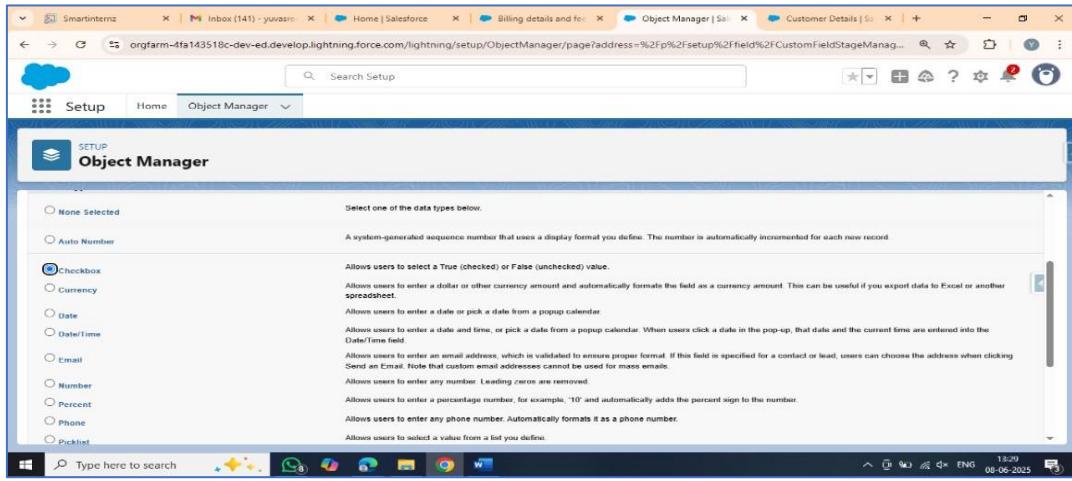
[Previous](#) [Next](#) [Cancel](#)

- Click on next >> next >> save.

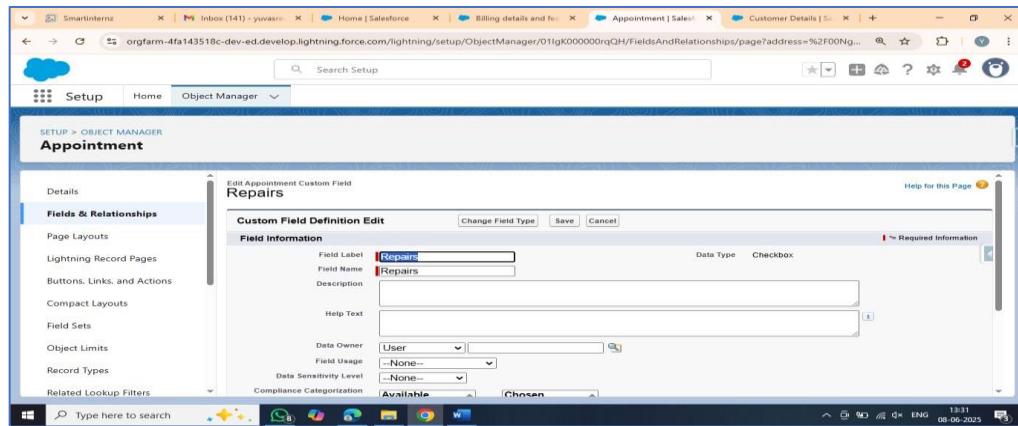
Creation of Another Checkbox Field on Appointment Object :

- 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.

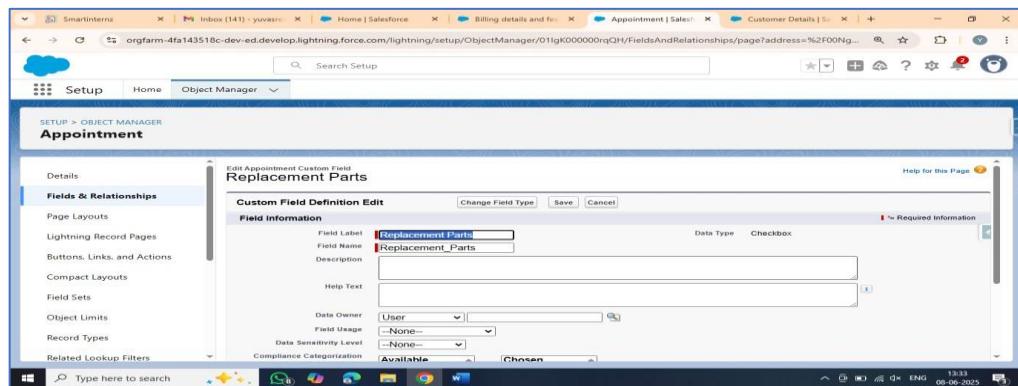
GARAGE MANAGEMENT SYSTEM



- 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

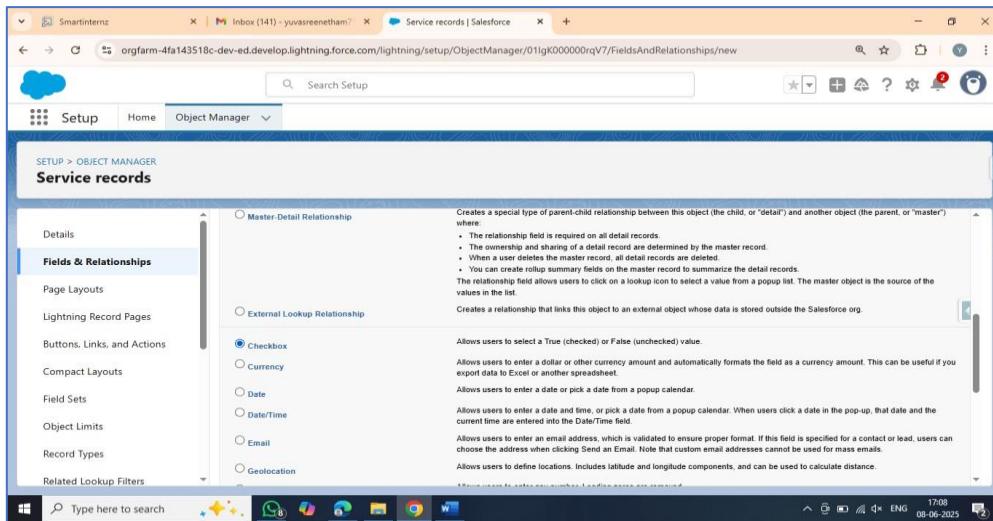


GARAGE MANAGEMENT SYSTEM

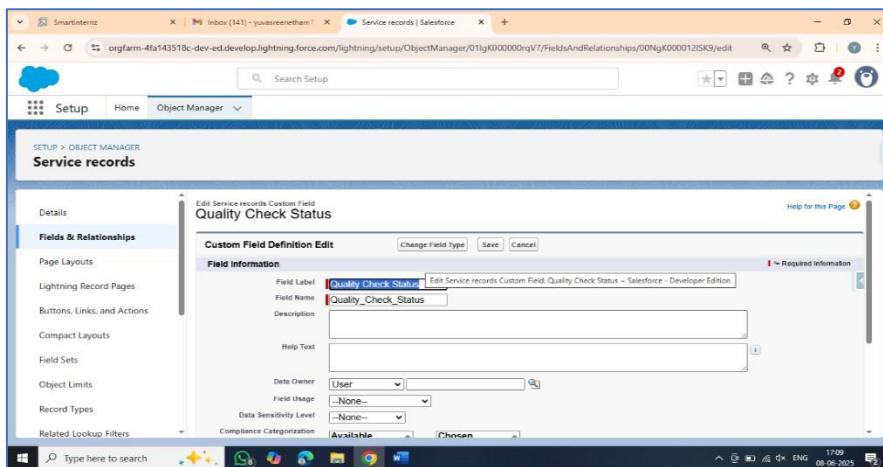
- Default value: unchecked
- Click on next >> next >> save.

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



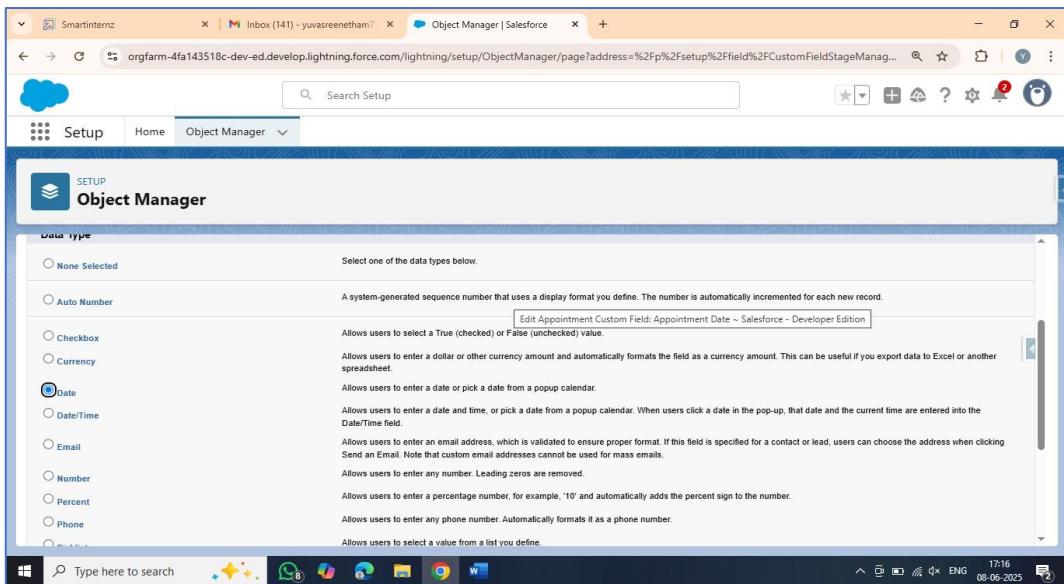
- Click on next >> next >> save.

GARAGE MANAGEMENT SYSTEM

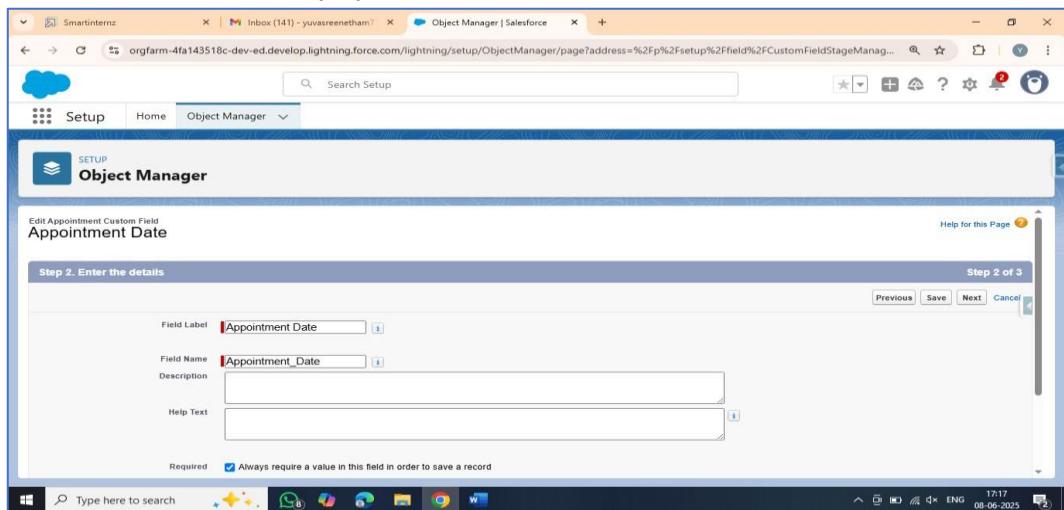
ACTIVITY – 4 : Creation of date Fields

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.

GARAGE MANAGEMENT SYSTEM

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

Step 2. Enter the details

Field Label: Service Amount

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

Length: 18 Decimal Places: 0

Field Name: Service_Amount

Description:

Help Text:

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

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

Step 2 of 4

Previous Next Cancel

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

Appointment
New Custom Field

Step 3. Establish field-level security

Field Label: Service Amounts
Data Type: Currency
Field Name: Service_Amounts
Description:

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

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

Step 3 of 4

Help for this Page

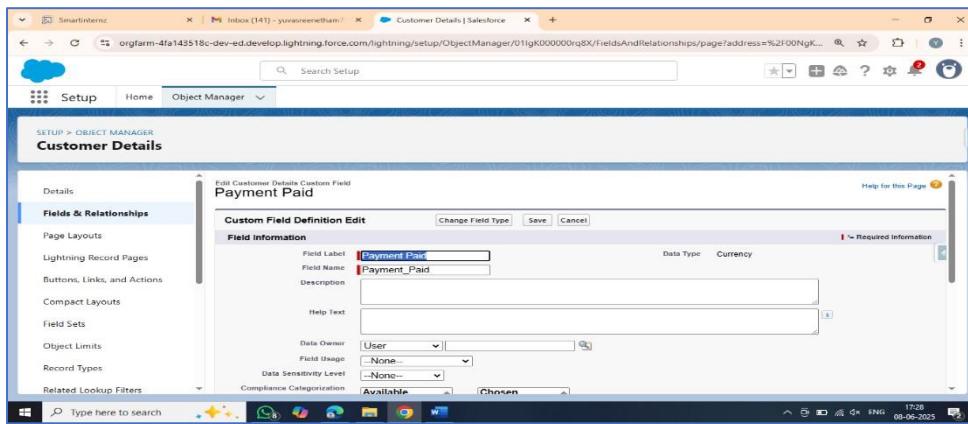
Previous Next Cancel

- 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



GARAGE MANAGEMENT SYSTEM

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

Step 2. Enter the details

Field Label: Vehicle number plate

Length: 10

Field Name: Vehicle_number_plate

Description:

Help Text:

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

Unique: Do not allow duplicate values

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

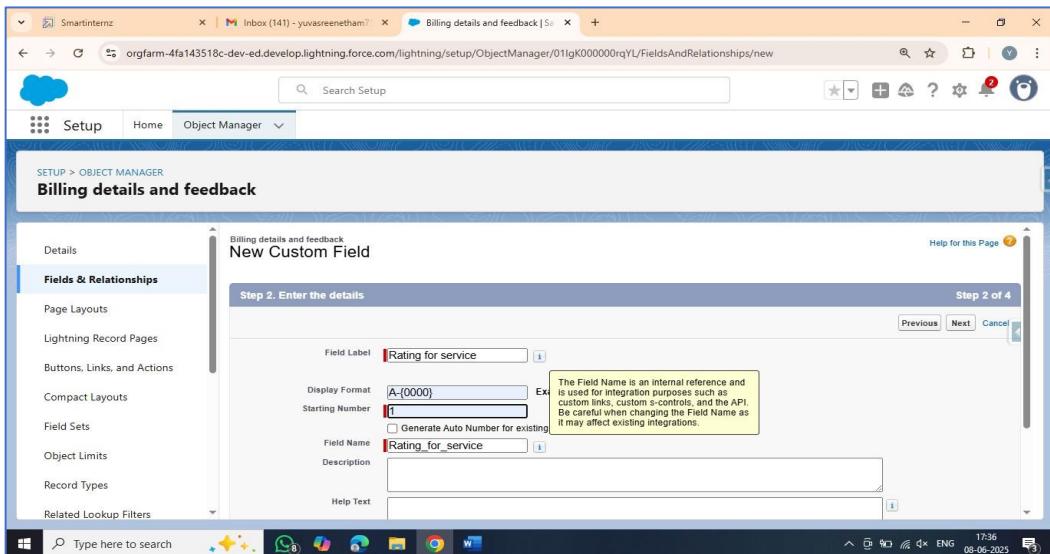
Auto add to custom report type: Set this field as the unique record identifier from an external system Add this field to existing custom report types that contain this entity

- 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



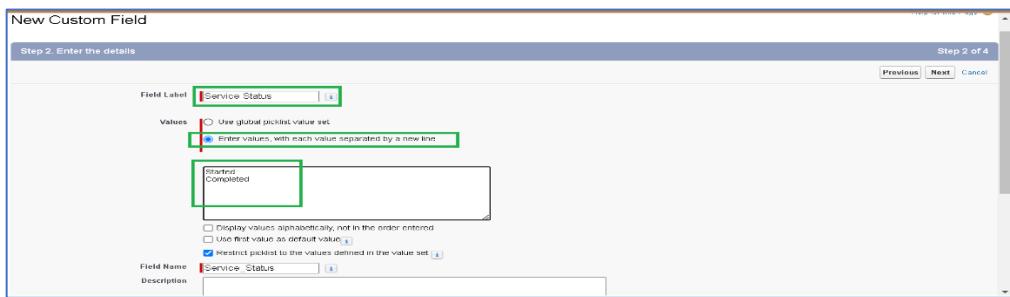
- Click on next >> next >> save

GARAGE MANAGEMENT SYSTEM

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.

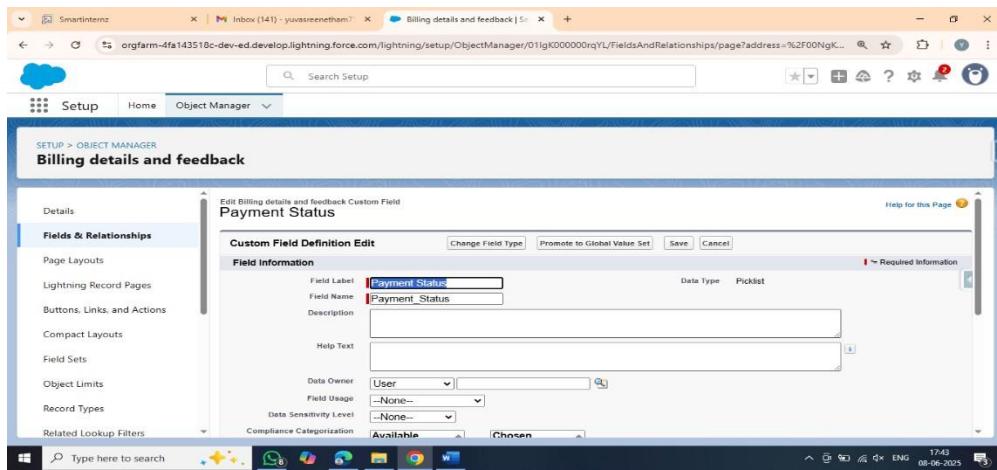


- Click Next.
- Next >> Next >> Save.

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.

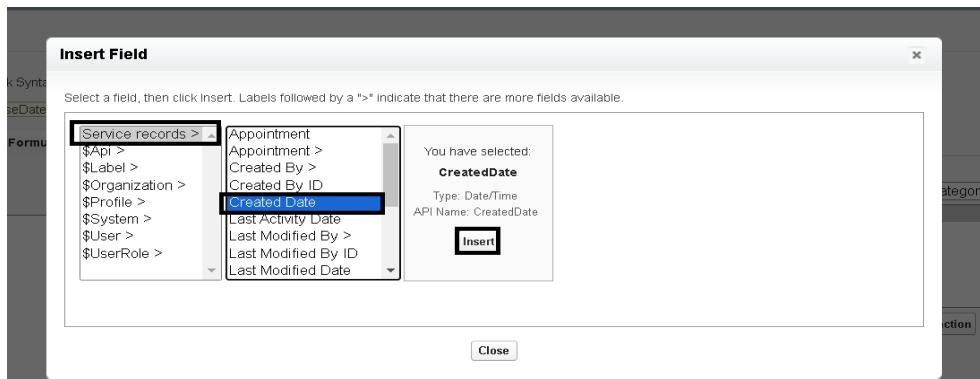
GARAGE MANAGEMENT SYSTEM

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



GARAGE MANAGEMENT SYSTEM

MILESTONE – 6

Validation rule

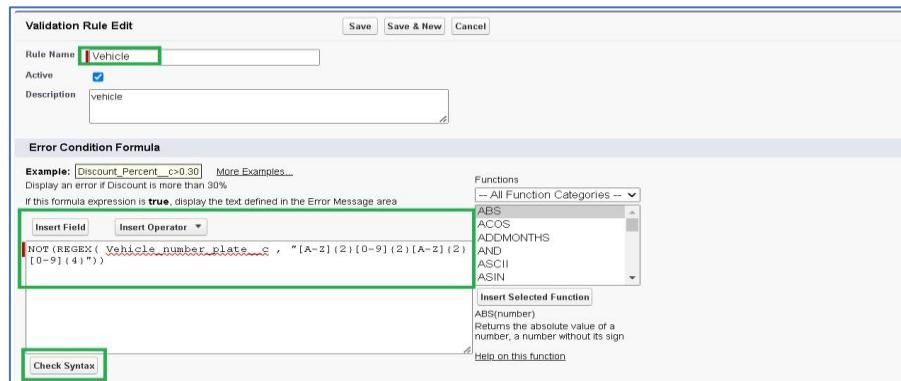
ACTIVITY -1 :- To create a validation rule to an Appointment Object

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

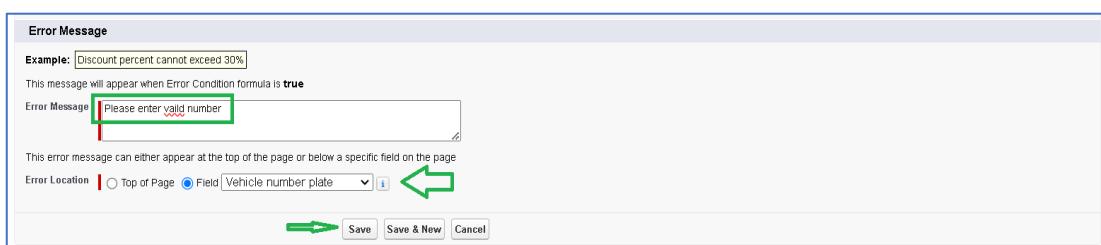


- Enter the Rule name as " Vehicle ".
- Insert the Error Condition Formula as : -

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 valid number ", select the Error location as Field and select the field as "Vehicle number plate", and click Save.



GARAGE MANAGEMENT SYSTEM

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}"))

Validation Rule Edit

Rule Name: rating_should_be_less_than_5

Active:

Description:

Error Condition Formula:

Quick Tips: Operators & Functions

- 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.

Insert Field

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

Check Syntax

Insert Selected Function

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

Help on this function

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is true

Error Message: rating should be from 1 to 5

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

GARAGE MANAGEMENT SYSTEM

MILESTONE- 7

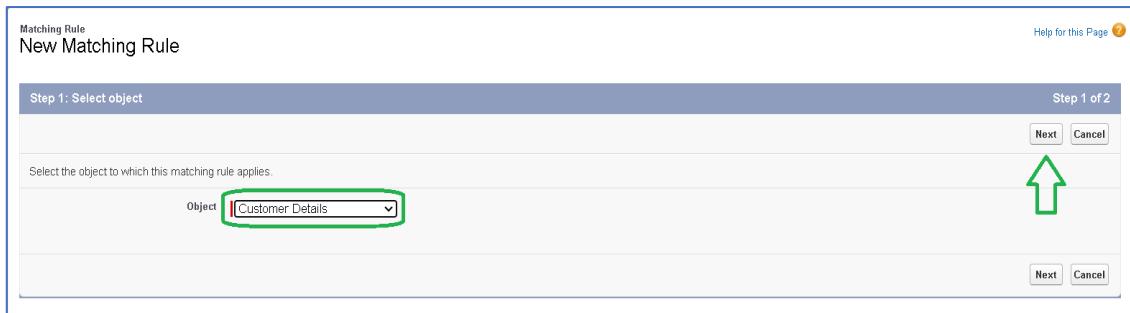
Duplicate rule

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.

GARAGE MANAGEMENT SYSTEM

Rule Details

Object: Customer Details
Rule Name: matching Customer data
Unique Name: matching_Customer_det

Matching Criteria

Tell the rule which fields to compare and how.

Field	Matching Method	Match Blank Fields	AND
Gmail	Exact	<input type="checkbox"/>	AND
Phone Number	Exact	<input type="checkbox"/>	AND
--None--	Exact	<input type="checkbox"/>	AND
--None--	Exact	<input type="checkbox"/>	AND
--None--	Exact	<input type="checkbox"/>	

Add Filter Logic... >>

<< Save Cancel

Matching Rule
matching Customer details

Matching Rule Detail

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

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.

DUP SETUP Duplicate Rules

All Duplicate Rules

What Are Duplicate Rules?

View: All Duplicate Rules

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

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

GARAGE MANAGEMENT SYSTEM

Edit Duplicate Rule
Customer Detail duplicate

Help for this Page

Duplicate Rule Edit **Save** **Save & New** **Cancel**

Rule Details ! = Required Information

Rule Name	<input type="text" value="Customer Detail duplicate"/>
Description	<input type="text"/>
Object	Customer Details
Record-Level Security	<input checked="" type="radio"/> Enforce sharing rules <input type="radio"/> Bypass sharing rules

Actions

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

Action On Create	<input type="radio"/> Allow <input checked="" type="checkbox"/> Alert <input type="checkbox"/> Report
Action On Edit	<input type="radio"/> Allow <input type="checkbox"/> Alert <input type="checkbox"/> Report
Alert Text	<input type="text" value="Use one of these records?"/>

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

Matching Rules

Define how duplicate records are identified.

Compare Customer Details With

Matching Rule

Matching Criteria

Field Mapping Mapping Selected

Add Rule **Remove Rule**

Conditions

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

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

Add Filter Logic...

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

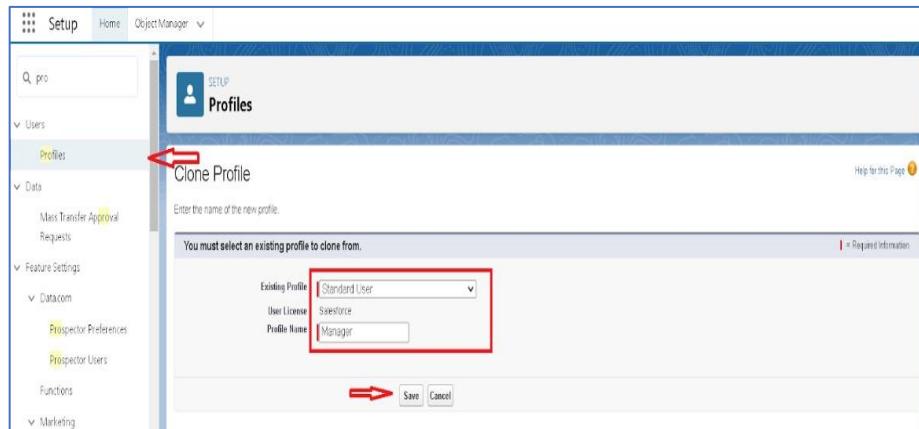
GARAGE MANAGEMENT SYSTEM

MILESTONE – 8

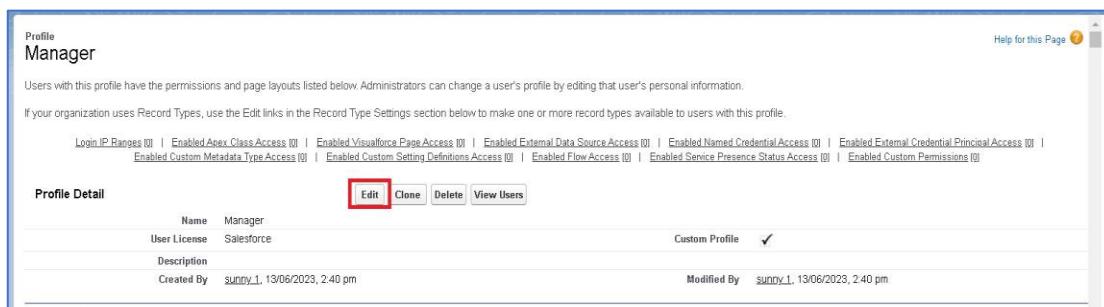
Profiles

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.

Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>	<input type="radio"/>	(standard__ServiceConsole)	<input type="checkbox"/>	<input checked="" type="radio"/>
Digital Experiences (standard__SalesforceCMS)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="radio"/>
Garage Management Application (Garage_Management_Application)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	Service Console (standard__LightningService)	<input checked="" type="checkbox"/>	<input type="radio"/>
Laptop Hub (Laptop_Hub)	<input type="checkbox"/>	<input type="radio"/>	Site.com (standard__Sites)	<input checked="" type="checkbox"/>	<input type="radio"/>

- 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.

GARAGE MANAGEMENT SYSTEM

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

- 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	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Billing details and feedback	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Customer Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Environments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Laptops	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Service records	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>				
SessionData	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- And click save.

GARAGE MANAGEMENT SYSTEM

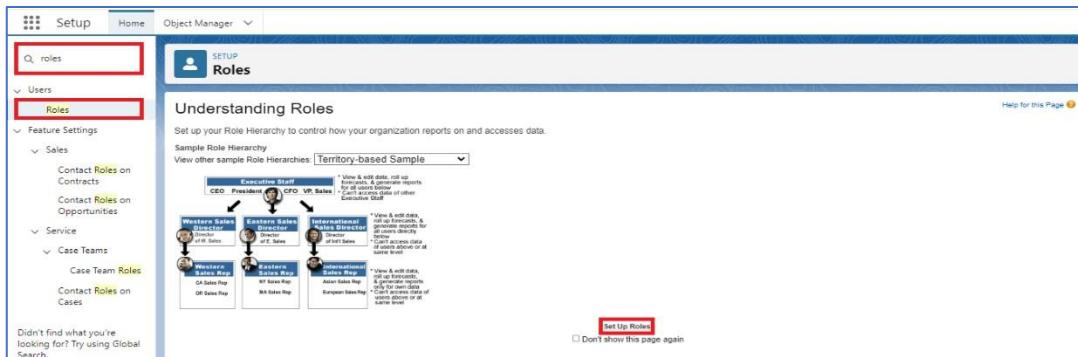
MILESTONE – 9

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.



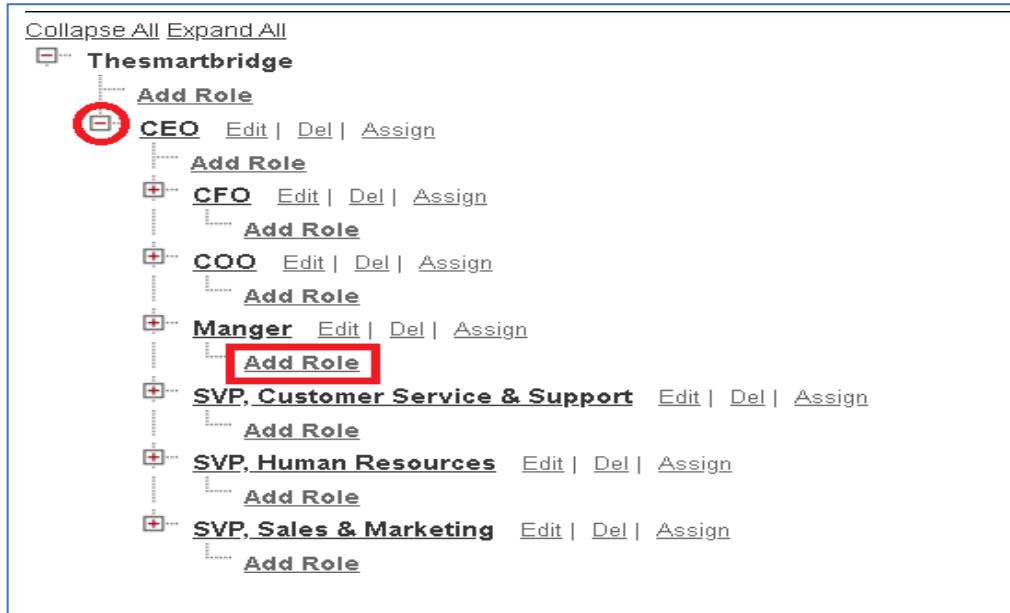
- Give Label as "Manager" and Role name gets auto populated. Then click on Save

GARAGE MANAGEMENT SYSTEM

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.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty00dgk000004auqjua0.edditq9ckma@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	chukka_victory_ivy	vchuk	victorivoy@ed567.com		<input checked="" type="checkbox"/>	Sales Person
<input type="checkbox"/>	EPIC_OrgFarm	OEPIc	oe9bb1dfa80b4@orgfarm.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	karapareddy_ushasree	ukara	kaushsa@33.com		<input checked="" type="checkbox"/>	Sales Person
<input type="checkbox"/>	Mikaelson_Niklaus	nmika	niklaus@blue23.com	Manager	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	netham_yuva_sree	yuv	yuvasreenetham751101@agentforce.com		<input checked="" type="checkbox"/>	System Administrator

- 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.

GARAGE MANAGEMENT SYSTEM

New User

User Edit

Save | Save & New | Cancel

General Information

First Name	Niklaus
Last Name	Mikaelson
Alias	nmika
Email	
Username	Mikaelson@Niklaus
Nickname	nik
Title	
Company	
Department	
Division	

Role: Manager
User License: Salesforce
Profile: Manager
Active: ✓

Marketing User:
Offline User:
Knowledge User:
Flow User:
Service Cloud User:
Site.com Contributor User:
Site.com Publisher User:
WDC User:
Data.com User Type: None

- Save.

ACTIVITY – 2 :- creating another users

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

Smartinternz | Inbox (141) - yuvareenetham7 | Object Manager | Salesforce | Users | Salesforce

Setup | Home | Object Manager |

SEARCH Setup

uSE

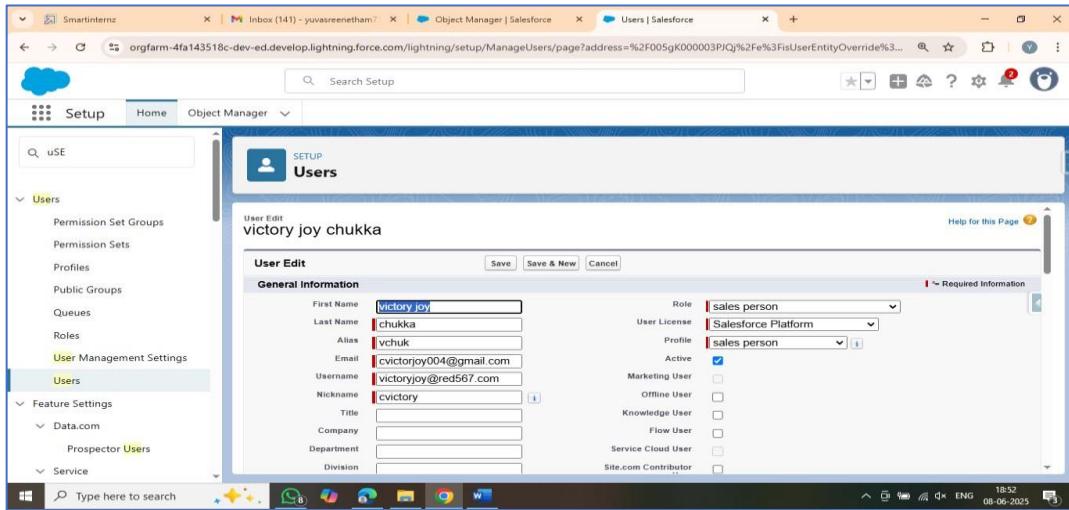
Users

All Users

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Export	Chatter	chatty_0dgk00004lujuao_eddit0@ckma@chatter.salesforce.com	salesperson	✓	Chatter Free User
<input type="checkbox"/>	Chukka_victory_joy	vchuk	victoryjoy@gre657.com	salesperson	✓	sales person
<input type="checkbox"/>	EPIC_OrgFarm	OEPIC	eoic_9eb33dab9b4@orgfarm.com	System Administrator	✓	System Administrator
<input type="checkbox"/>	Karanaparthy_uhasree	ukara	kausa@33.com	salesperson	✓	sales person
<input type="checkbox"/>	Mikaelson_Niklaus	nmika	niklaus@blue23.com	Manager	✓	Manager
<input type="checkbox"/>	netham_yuva sree	yuu	yuvareenetham751101@agentforce.com		✓	System Administrator

- 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

GARAGE MANAGEMENT SYSTEM



- Save.

GARAGE MANAGEMENT SYSTEM

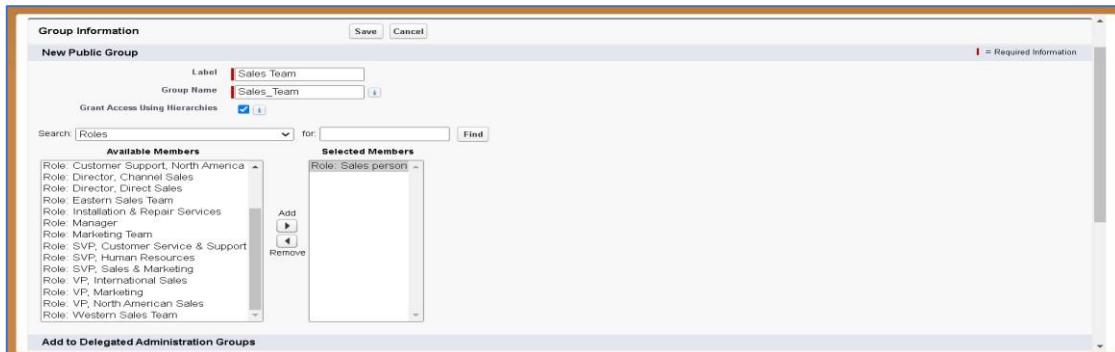
Milestone - 11 Public Groups

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.



GARAGE MANAGEMENT SYSTEM

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.

The screenshot shows the 'Sharing Settings' page in Salesforce. Under the 'Sharing Settings' section, there is a table where rows represent different objects and their Out-of-the-Box Default (OWD) sharing levels. The 'Service records' row has its OWD dropdown set to 'Private', which is highlighted with a red box. Other objects like Work Plan Template, Work Step Template, Work Type, etc., have their OWD set to 'Public Read/Write'. At the bottom of the page, there are 'Save' and 'Cancel' buttons, with 'Save' also highlighted with a red box.

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

The screenshot shows the 'Service records Sharing Rules' page. At the top left, it says 'Service records Sharing Rules' and has a 'New' button highlighted with a red arrow. Below that, it says 'No sharing rules specified.' On the right side, there is a 'Service records Sharing Rules Help' link.

- 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.

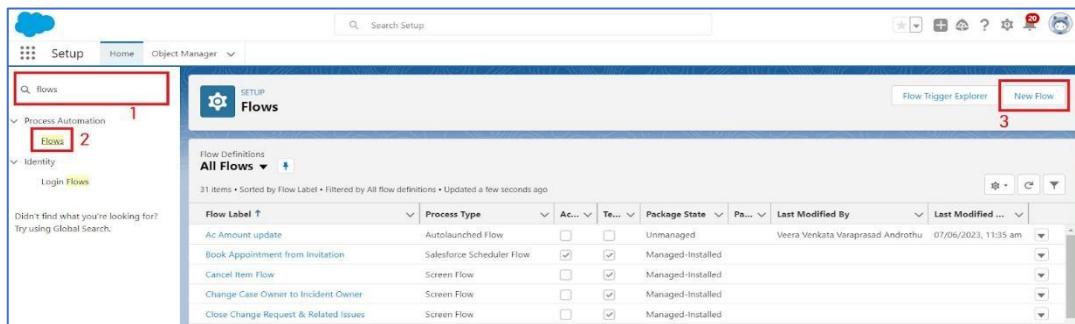
The screenshot shows the 'Sharing Settings' configuration steps.
 - Step 1: Rule Name: 'sharing settings' is highlighted with a red arrow.
 - Step 2: Select your rule type: 'Based on record owner' is selected.
 - Step 3: Select which records to be shared: 'Service records: owned by members of' dropdown is highlighted with a red arrow.
 - Step 4: Select the users to share with: 'Share with' dropdown is highlighted with a red arrow.
 - Step 6: Select the level of access for the users: 'Access Level' dropdown is highlighted with a red arrow.
 - At the bottom, 'Save' and 'Cancel' buttons are visible.

GARAGE MANAGEMENT SYSTEM

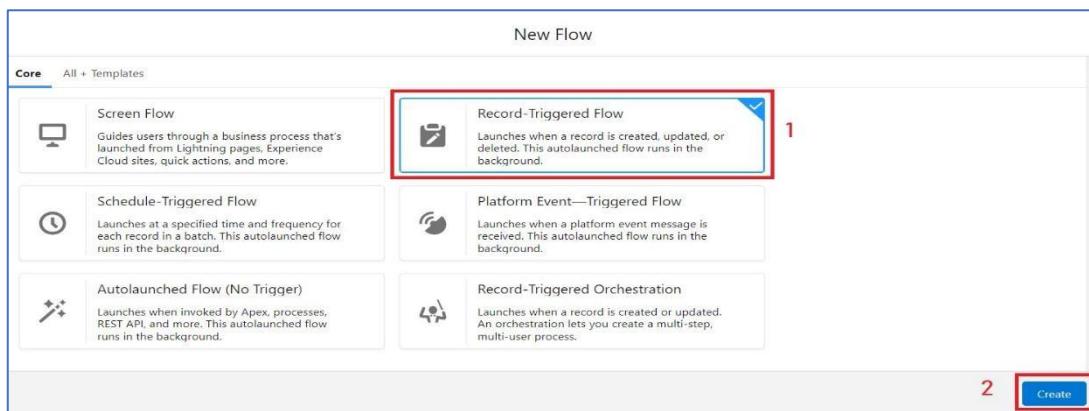
Milestone – 13 Fields

ACTIVITY – 1:- Create a Flow

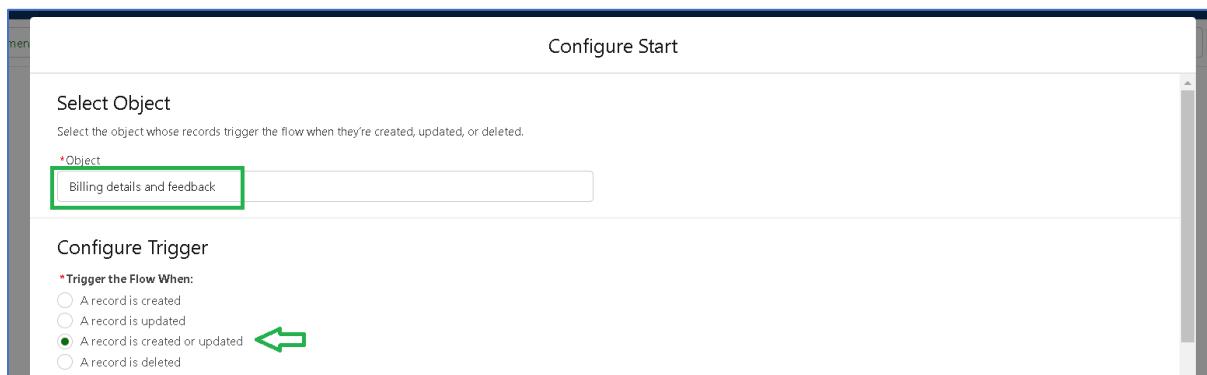
- Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.



- 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

Set Entry Conditions

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

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

Condition Requirements:

None

* Optimize the Flow for:

Fast Field Updates

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

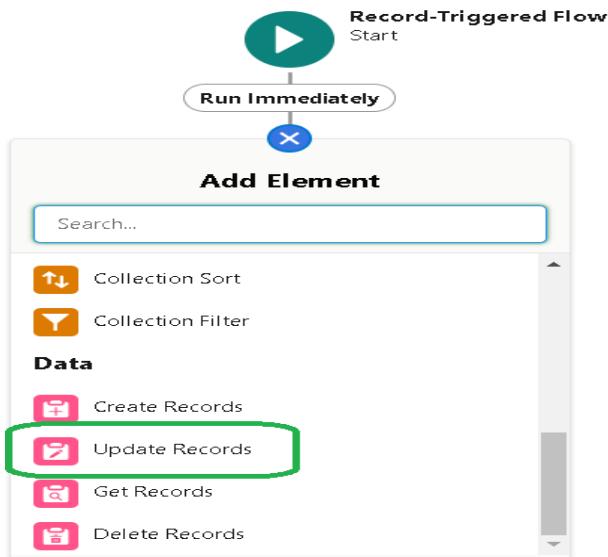
Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

Actions and Related Records 3

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

Cancel Done 4

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



GARAGE MANAGEMENT SYSTEM

Give the Label Name : Amount Update

- Api name : is auto populated

Edit Update Records

Update Salesforce records using values from the flow.

*Label: Amount Update *API Name: Amount_Update

Description:

How to Find Records to Update and Set Their Values

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

Set Filter Conditions

Condition Requirements to Update Record: All Conditions Are Met (AND)

Cancel Done

Set Filter Conditions

Condition Requirements to Update Record: All Conditions Are Met (AND)

Field	Operator	Value
Payment_Status__c	Equals	Completed

+ Add Condition

Set Field Values for the Billing details and feedback Record

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

+ Add Field

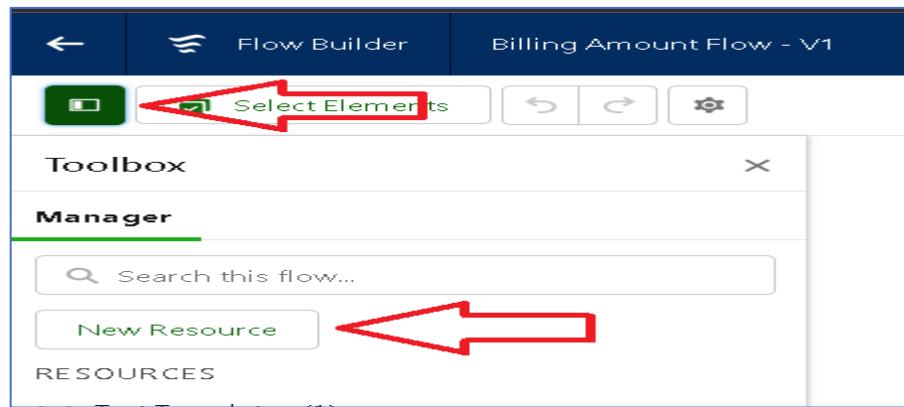
Cancel Done

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}

GARAGE MANAGEMENT SYSTEM

- 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},

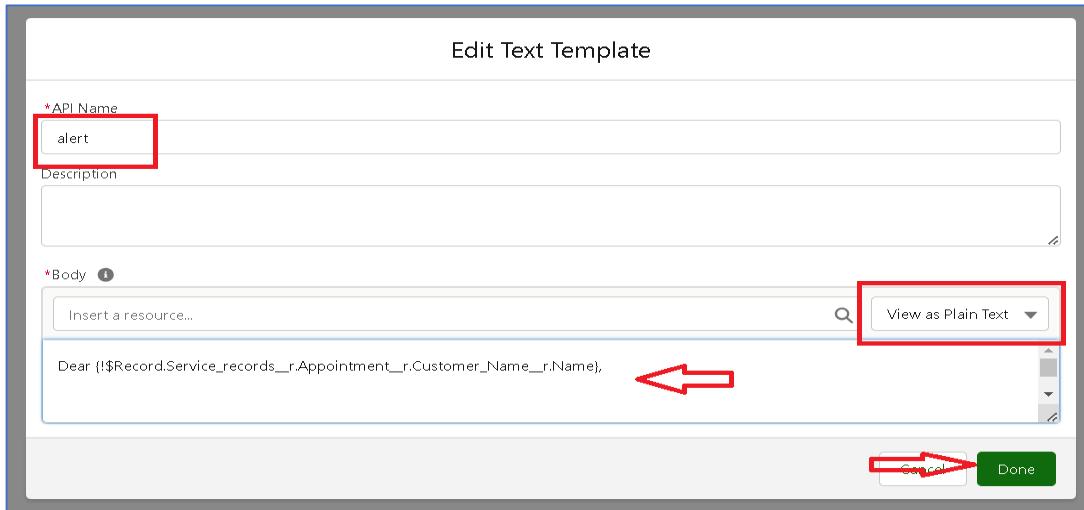
I hope this message finds you well. I wanted to take a moment to express my sincere gratitude for your recent payment for the services provided by our garage management team. Your prompt payment is greatly appreciated, and it helps us continue to provide top-notch services to you and all our valued customers.

Amount paid : {!\$Record.Payment_Paid__c}

Thank you for Coming .

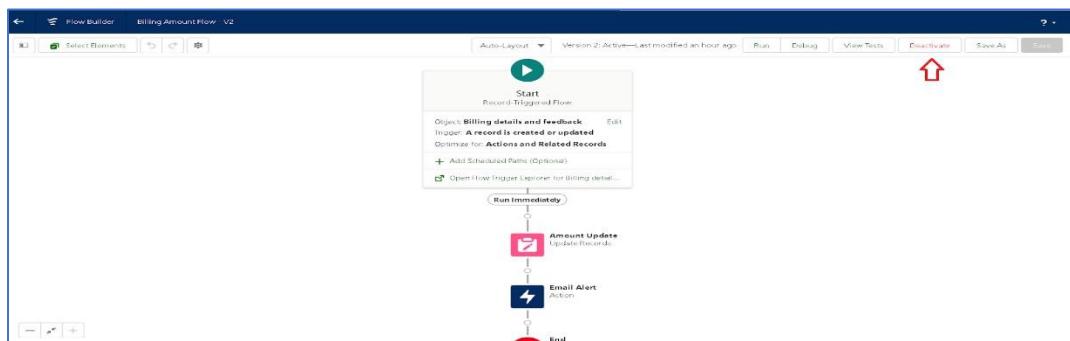
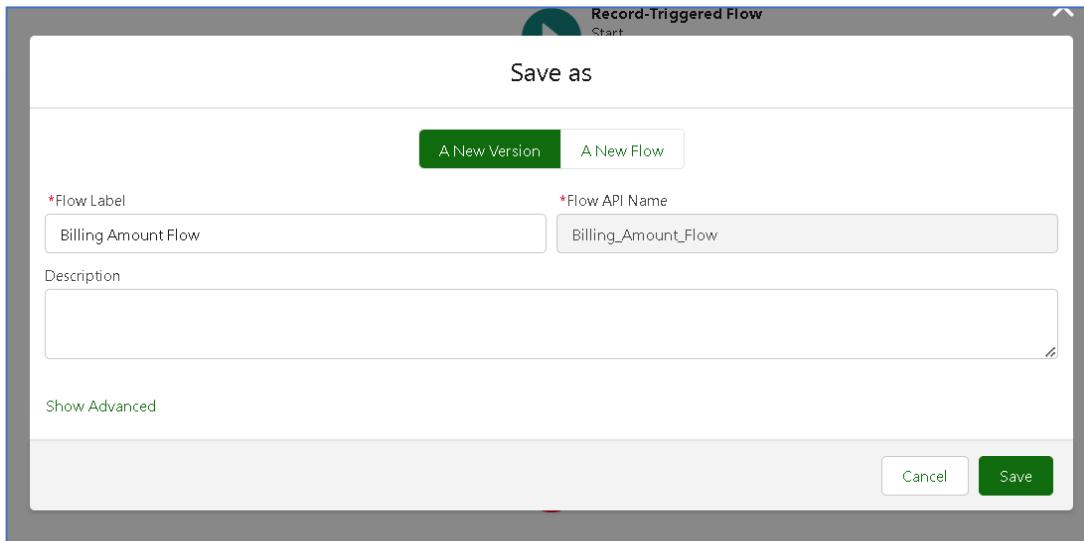
- Click done.

GARAGE MANAGEMENT SYSTEM



- 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.

GARAGE MANAGEMENT SYSTEM

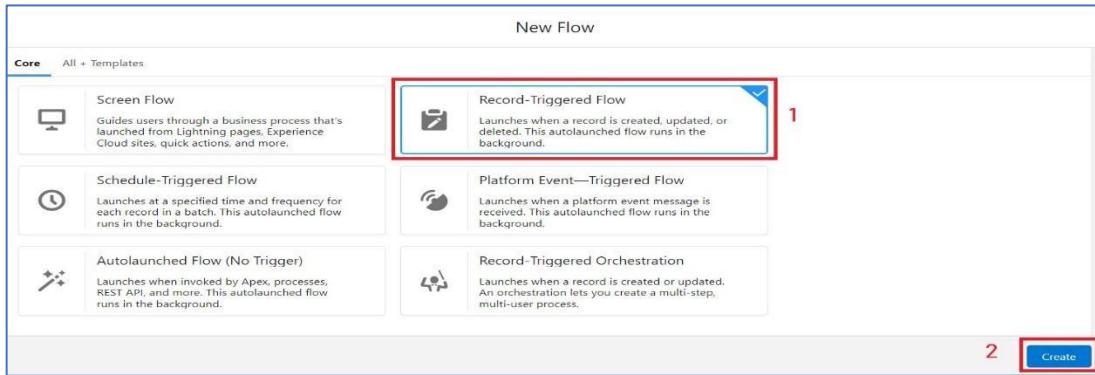


ACTIVITY – 2 :- Create another Flow

- 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.

GARAGE MANAGEMENT SYSTEM



- 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

GARAGE MANAGEMENT SYSTEM

Set Filter Conditions

Condition Requirements to Update Record

All Conditions Are Met (AND)

Field	Operator	Value
Quality_Check_Status_c	Equals	True 

[+ Add Condition](#)

Set Field Values for the Service record Record

Field	Value
Service_Status_c	Completed 

[+ Add Field](#)

- 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

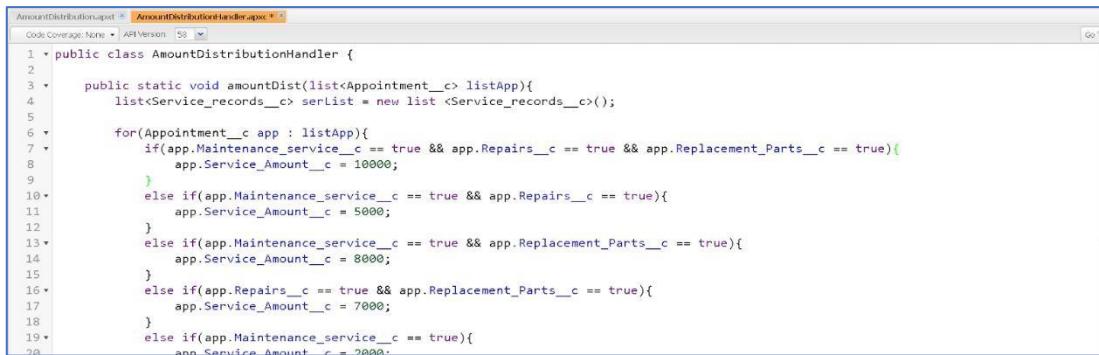
MILESTONE – 14

Apex Trigger

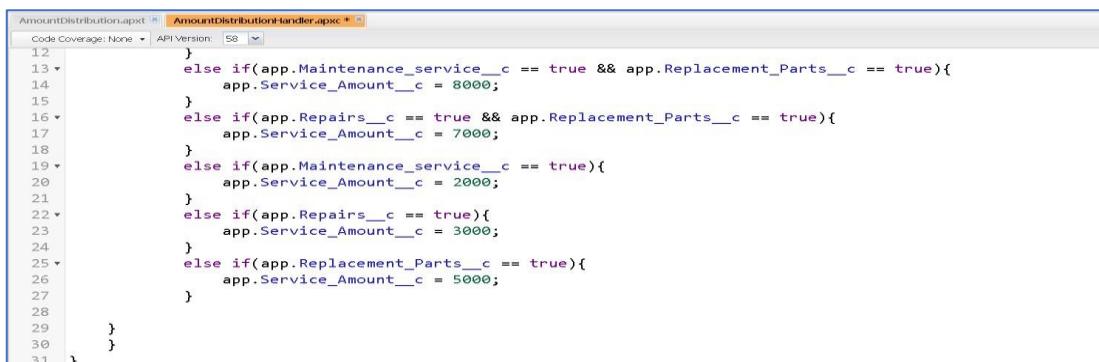
ACTIVITY -1 :- Apex handler

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".



```
AmountDistribution.apc1  AmountDistributionHandler.apc1 * [1]
Code Coverage: None API Version: 58
1 public class AmountDistributionHandler {
2
3     public static void amountDist(list<Appointment__c> listApp){
4         list<Service_records__c> serList = new list <Service_records__c>();
5
6         for(Appointment__c app : listApp){
7             if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){
8                 app.Service_Amount__c = 10000;
9             }
10            else if(app.Maintenance_service__c == true && app.Repairs__c == true){
11                app.Service_Amount__c = 5000;
12            }
13            else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
14                app.Service_Amount__c = 8000;
15            }
16            else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
17                app.Service_Amount__c = 7000;
18            }
19            else if(app.Maintenance_service__c == true){
20                app.Service_Amount__c = 2000;
21            }
22        }
23    }
24}
25}
26}
27}
28}
29}
30}
31}
```



```
AmountDistribution.apc1  AmountDistributionHandler.apc1 * [2]
Code Coverage: None API Version: 58
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){
```

GARAGE MANAGEMENT SYSTEM

```
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){
```

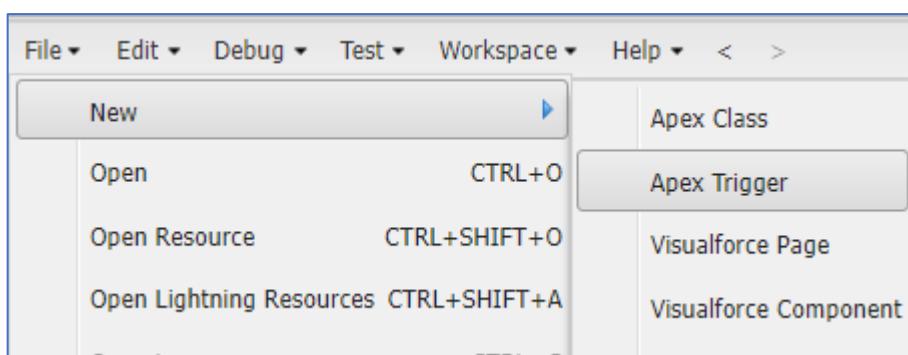
GARAGE MANAGEMENT SYSTEM

```
    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**



GARAGE MANAGEMENT SYSTEM



Syntax For creating trigger :

The syntax for creating trigger is :

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

```
{
}
```

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

1. Handler for the Appointment Object

```
File ▾ Edit ▾ Debug ▾ Test ▾ Workspace ▾ Help ▾ < >
AmountDistribution.apxt AmountDistributionHandler.apxc * 
Code Coverage: None ▾ API Version: 58 ▾
1 trigger AmountDistribution on Appointment__c (before insert, before update) {
2
3     if(trigger.isbefore && trigger.isinsert || trigger.isupdate){
4         AmountDistributionHandler.amountDist(trigger.new);
5     }
6
7 }
8 }
```

Code:

trigger AmountDistribution on Appointment_c (before insert, before update)

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

    AmountDistributionHandler.amountDist(trigger.new);

}
```

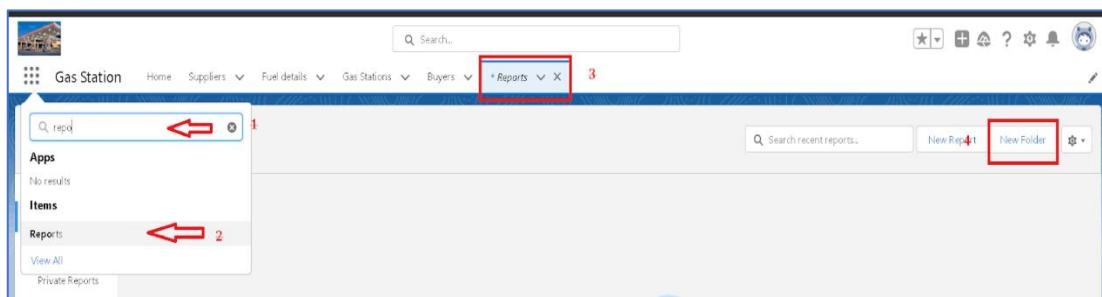
GARAGE MANAGEMENT SYSTEM

MILESTONE – 15

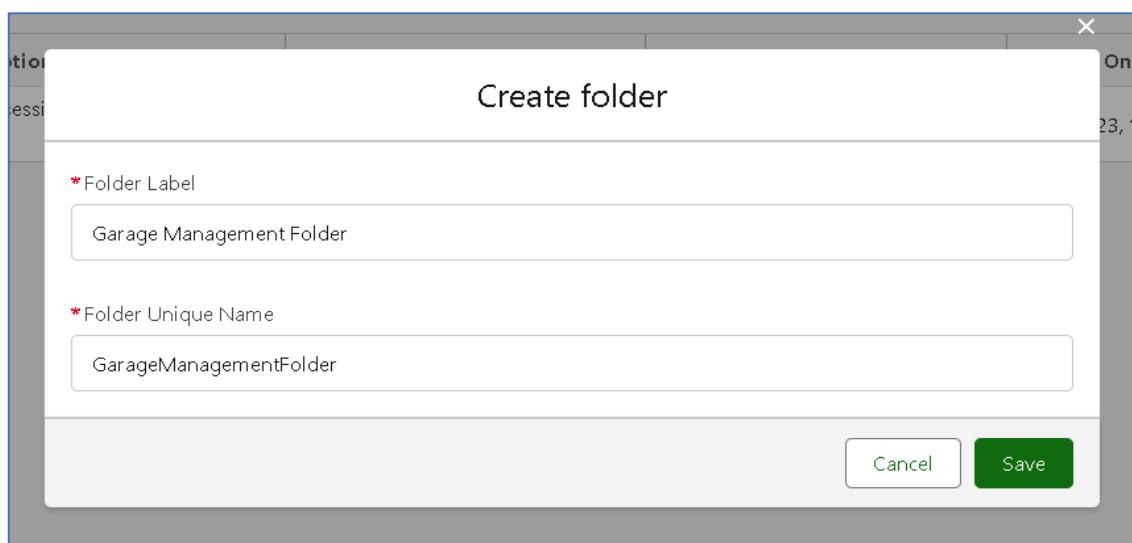
Reports

ACTIVITY – 1:- create a report folder

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



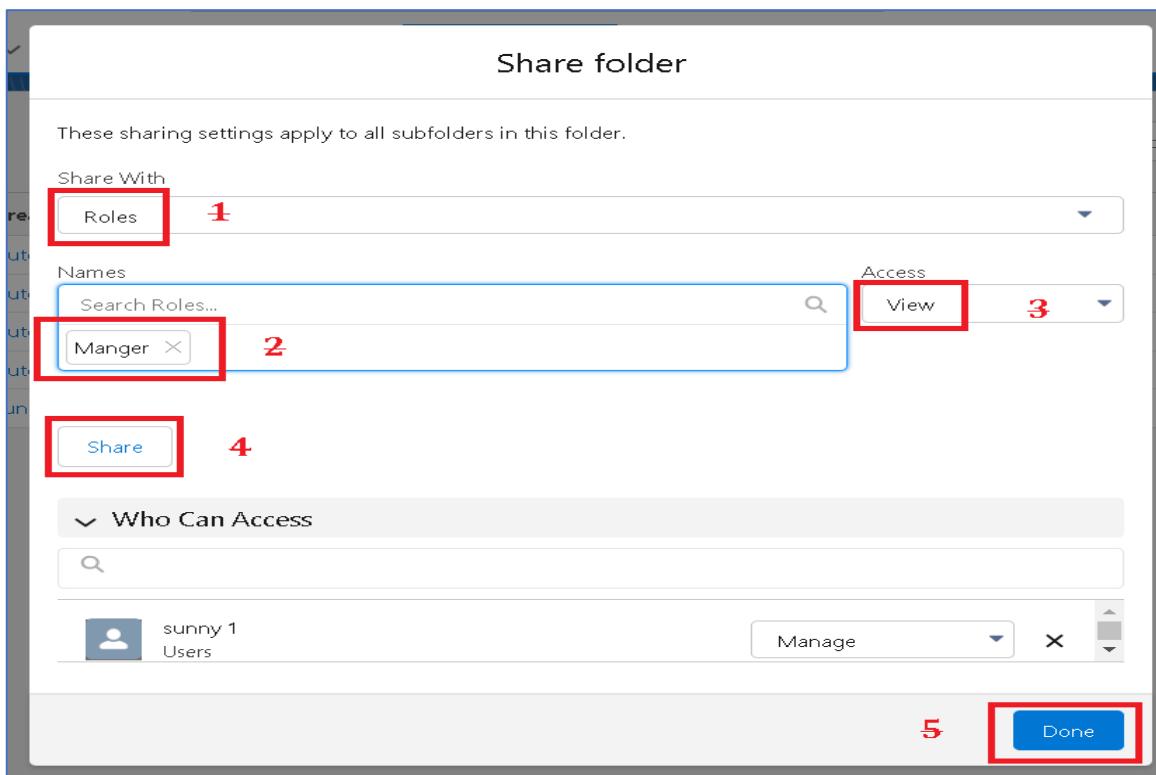
- Give the Folder label as "Garage Management Folder", Folder unique name will be auto populated.
- Click save.



GARAGE MANAGEMENT SYSTEM

ACTIVITY – 2: - Sharing a report folder

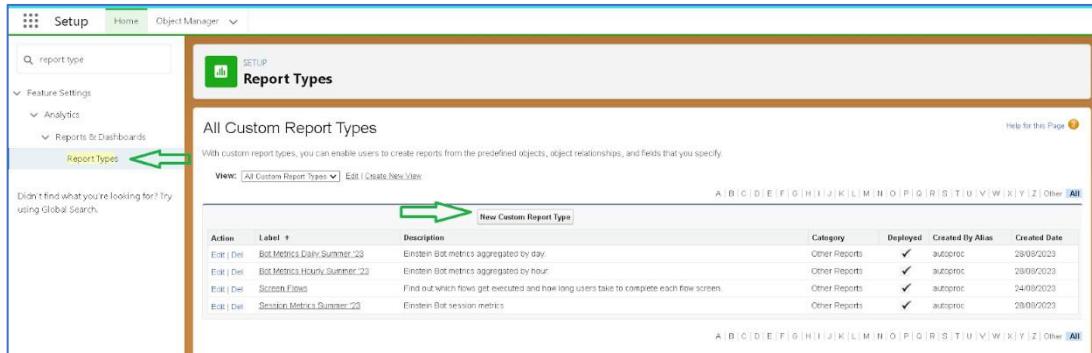
- Go to the app >> click on the reports tab.
- Click on the All folder , click on the Drop down arrow for Garage Management folder, and Click on share.
- Select the share with as “roles”, in name field search for “manager”, give “view” as access for that role.
- Then click share, and click on Done.



GARAGE MANAGEMENT SYSTEM

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.



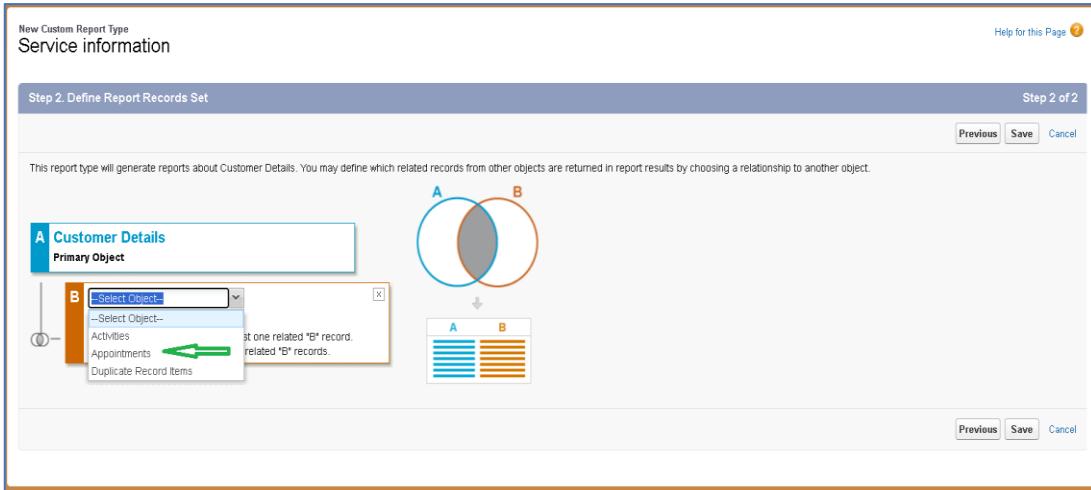
- Select the Primary object as " Customer details" .
- Give the Report type Label as " Service information "
- Report type Name is autopopulated.
- Keep the Description as same.
- Select Store in Category as " other Reports "
- Select the deployment status as " Deployed ", click on Next.

This screenshot shows the 'Report Type Focus' configuration page. It includes sections for 'Identification' (Primary Object: Customer Details, Report Type Label: Service information, Report Type Name: Service_information, Description: Service information, Store in Category: Other Reports) and 'Deployment' (Deployment Status: Deployed). A green arrow points to the 'Next' button at the bottom right of the form.

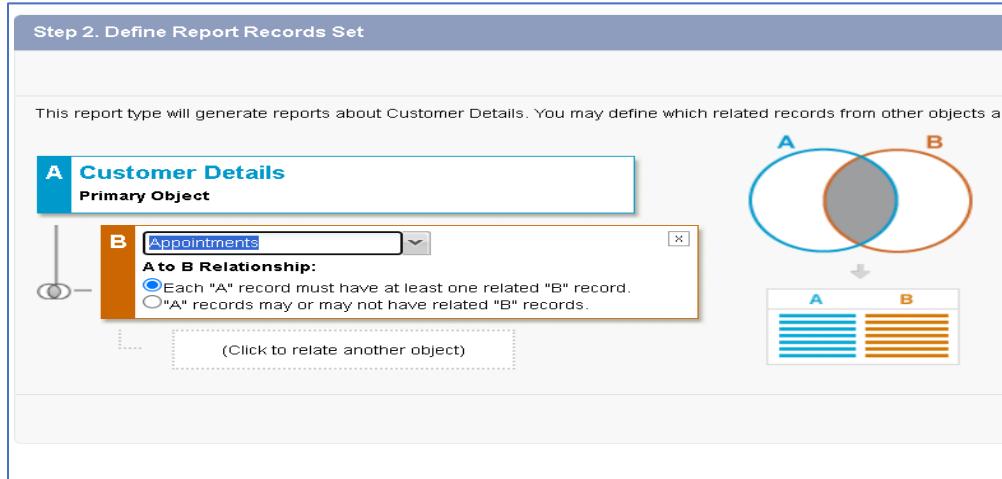
- now , Click on Related object box.

GARAGE MANAGEMENT SYSTEM

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

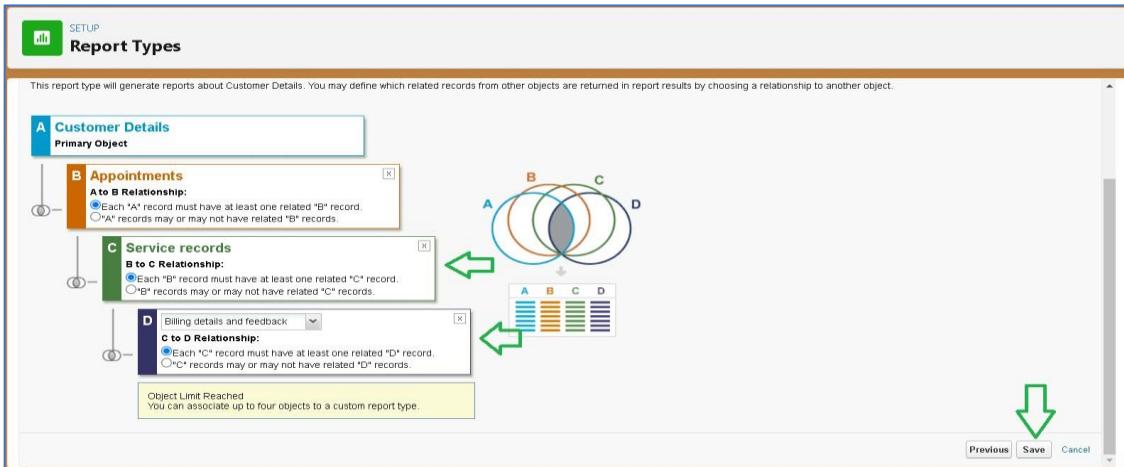


- Again, click to relate another object.



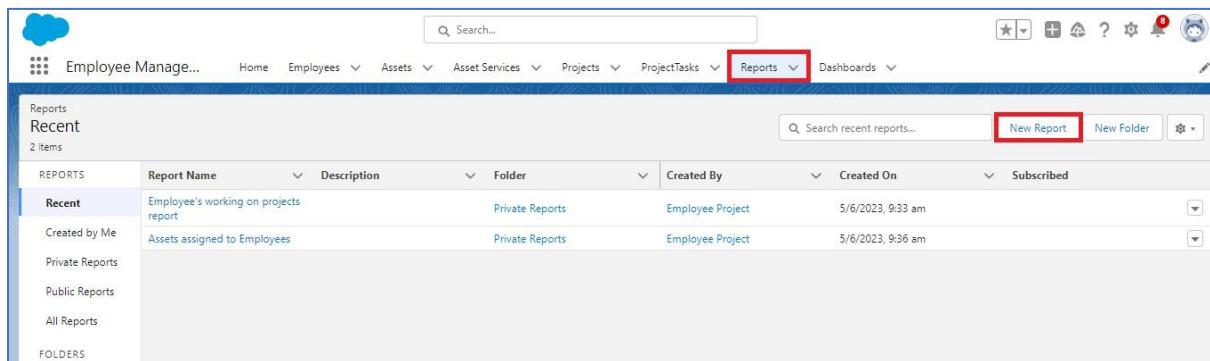
- And select the related object as " service records".
- Repeat the process and select the related object as " Billing details and feedback".
- And click on save.

GARAGE MANAGEMENT SYSTEM

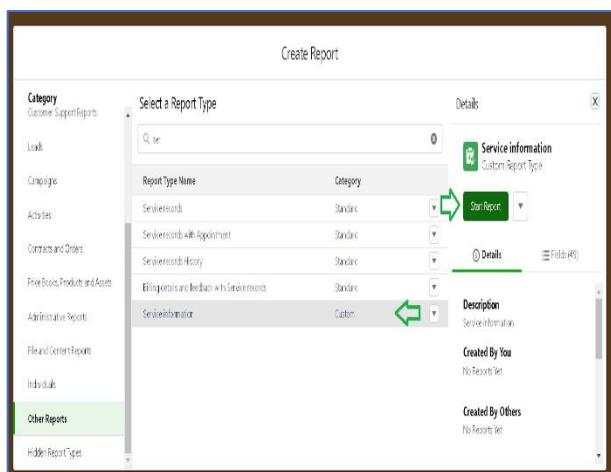


ACTIVITY – 4 :- Create Report

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

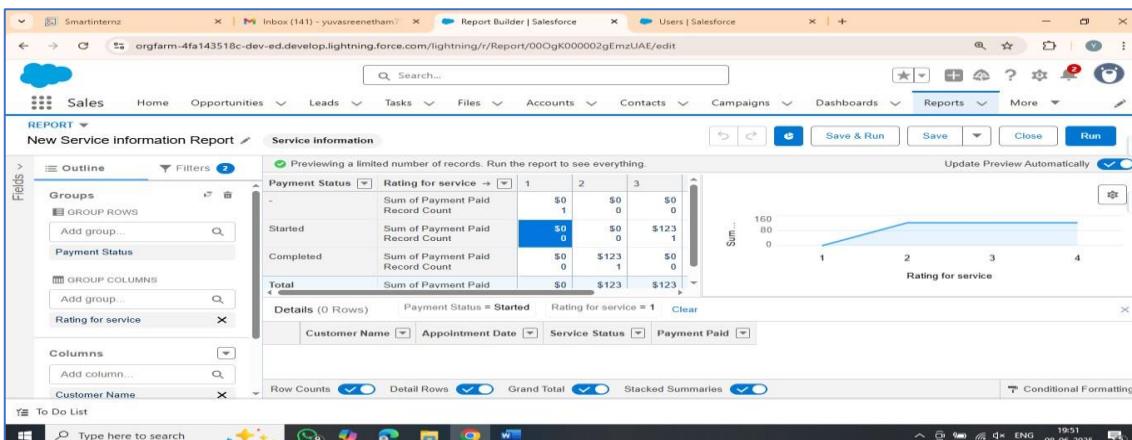


- Select the Category as other reports, search for Service Information, select that report, click on it. And click on start report



GARAGE MANAGEMENT SYSTEM

- Their outline pane is opened already, 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



Save Report

Report Name: New Service information Report

Report Unique Name: New_Service_information_Report_oVu

Report Description:

Folder: Garage Management Folder

Cancel Save

GARAGE MANAGEMENT SYSTEM

MILESTONE – 16

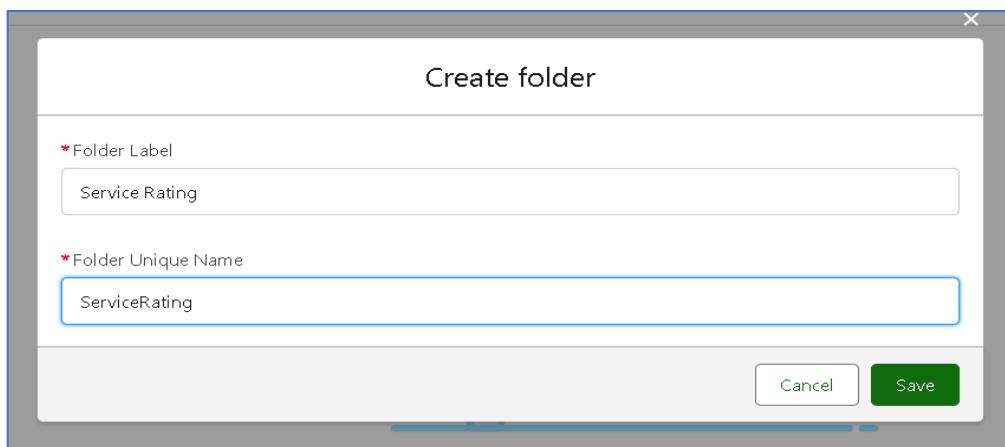
Dashboards

ACTIVITY – 1 :- Create Dashboard Folder

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

The screenshot shows the Salesforce Lightning interface. The top navigation bar includes links for Smartinternz, Inbox (141), Recent | Dashboards | Salesfo..., and Users | Salesforce. The main content area is titled 'Dashboards' and shows a list of recent dashboards. The 'Customer Review' dashboard is described as 'View data on how Enablement helps drive your business outcomes.' The 'Enablement Dashboard' is described as 'This is your main dashboard for all Enablement analytics. Don't delete it. If you want to make changes to this dashboard, duplicate it.' A sidebar on the left lists categories like 'Recent', 'DASHBOARDS', 'Folders', and 'FAVORITES'. At the bottom, there's a search bar and a taskbar.

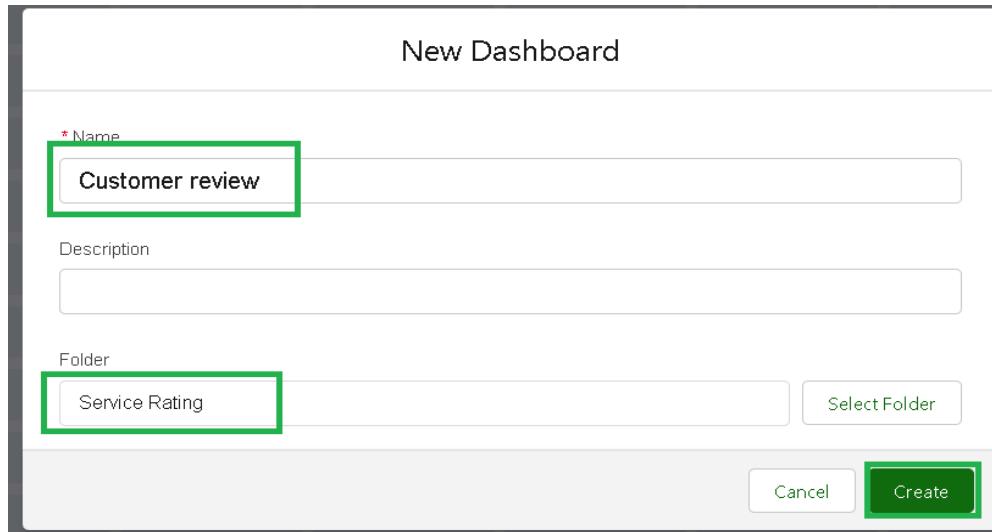
- Click new folder, give the folder label as " Service Rating dashboard".
- Folder unique name will be auto populated.
- Click save.



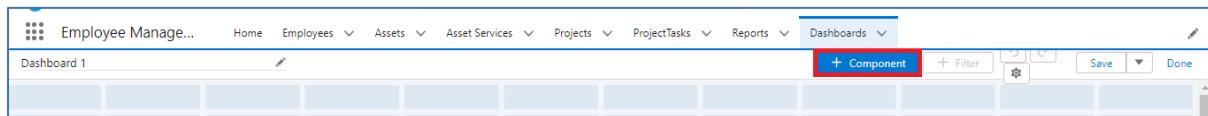
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ACTIVITY – 2: Create Dashboard

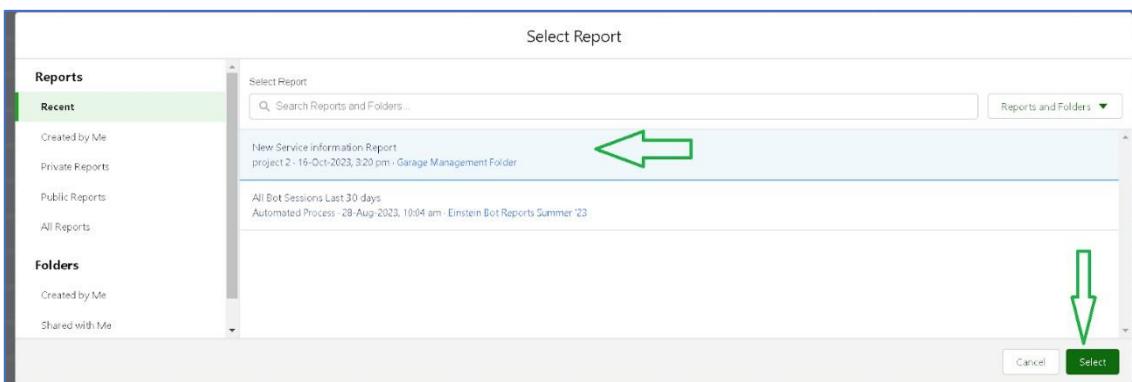
- Go to the app >> click on the Dashboards tabs.
- Give a Name and select the folder that created, and click on create.



- Select add component



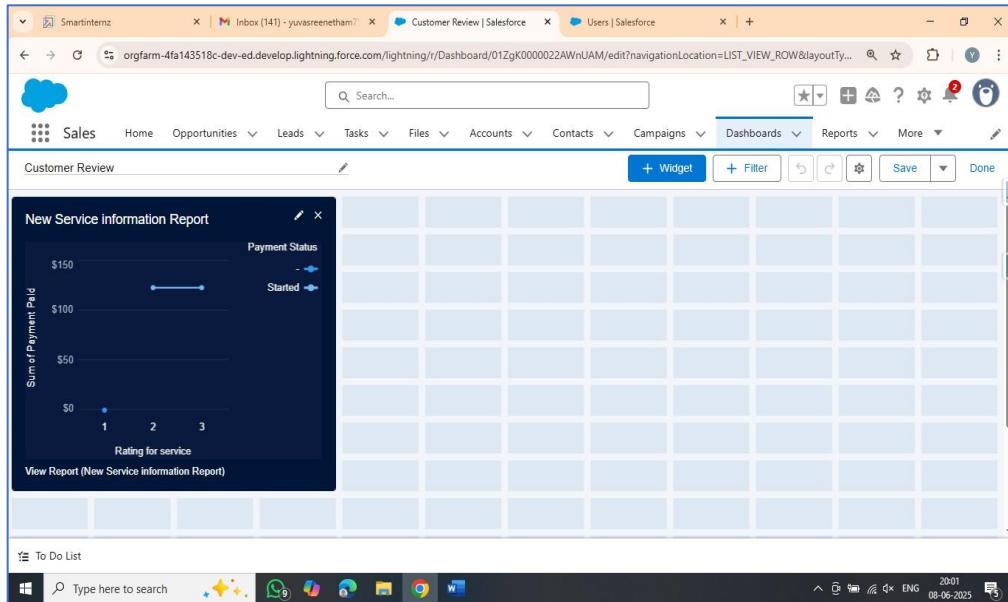
- Select a Report and click on select.



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

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- Preview is shown below.



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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.

New Customer Detail

* = Required Information

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

Owner: Annapurna SmartBridge

Cancel Save & New 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.

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The screenshot shows the 'Appointment' creation page. At the top, there's a navigation bar with tabs like 'Customer Details', 'Appointments', 'Service records', 'Billing details and feedback', 'Reports', and 'Dashboards'. Below the navigation is a header with a green icon and the text 'Appointment app-016'. The main form contains fields for 'Appointment Name' (app-016), 'Customer Details' (Mac), 'Appointment Date' (13/11/2024), 'Maintenance service' (checked), 'Repairs' (checked), 'Replacement Parts' (unchecked), 'Service Amount' (empty), and 'Vehicle number plate' (TS30EU0443). On the right, it shows the 'Owner' as 'Annapurna SmartBridge'. At the bottom, there are 'Cancel' and 'Save' buttons, along with a note that the 'Save' button was used at 18/11/2024, 3:28 pm.

Now, Create a service Record

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

The screenshot shows the 'New Service record' creation page. It has a header 'New Service record' and a note '* = Required Information'. The 'Information' section includes fields for 'Service Record Name' (Appointment app-016), 'Owner' (Annapurna SmartBridge), 'Quality Check Status' (unchecked), and 'Service Status' (Started). At the bottom, there are 'Cancel', 'Save & New', and 'Save' buttons.

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

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Service Record Name
ser-010

* Appointment
 X

Quality Check Status ✓ ↶

Service Status

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

Created By Annapurna SmartBridge, 18/11/2024, 4:32 pm Save

- Now automatically Service status will be moved to completed.

Related	Details
Service Record Name	<input type="text" value="ser-010"/>
Appointment	<input type="text" value="app-016"/> -pencil
Quality Check Status	<input checked="" type="checkbox"/> -pencil
Service Status	<input type="text" value="Completed"/>
service date	<input type="text" value="18/11/2024"/>
Created By	Annapurna SmartBridge, 18/11/2024, 4:32 pm
Last Modified By	Annapurna SmartBridge, 18/11/2024, 4:34 pm

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Outputs:

Customer Details:

New Customer Details

* = Required Information

Information	
* Customer Name	<input type="text"/>
Phone number	<input type="text"/>
Gmail	<input type="text"/>
* Service Status	<input type="text" value="--None--"/>
Payment Paid	<input type="text"/>
Payment Status	<input type="text" value="--None--"/>
<input type="button" value="Rating for service"/> <input type="button" value="Cancel"/> <input type="button" value="Save & New"/> <input type="button" value="Save"/>	

Appointment:

New Appointment

* = Required Information

Information	
Customer Details	<input style="width: 150px; height: 25px; margin-bottom: 5px;" type="text"/> <input type="button" value="Search Customer Details..."/> <input type="button" value=""/>
Maintenance service	<input type="checkbox"/>
Repairs	<input type="checkbox"/>
Replacement Parts	<input type="checkbox"/>
* Appointment Date	<input type="text"/>
Service Amount	<input type="text"/>
* Vehicle number plate	<input type="text"/>
<input type="button" value="Cancel"/> <input type="button" value="Save & New"/> <input type="button" value="Save"/>	
Customer Name: <input type="text"/>	

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Service Records:

New Service records

* = Required Information

Information	
Service records Name	Owner  yuva sree netham
Quality Check Status <input checked="" type="checkbox"/>	
Service Status --None--	
* Appointment Search Appointments... <input type="button" value="🔍"/>	
<input type="button" value="Cancel"/> <input type="button" value="Save & New"/> <input type="button" value="Save"/>	

Billing Details and Feedback:

New Billing details and feedback

* = Required Information

Information	
Billing details and feedback Name	Owner  yuva sree netham
* Rating for service <input type="text"/>	
Payment Status --None--	
Service records Search Service records... <input type="button" value="🔍"/>	
* Payment Paid <input type="text"/>	
<input type="button" value="Cancel"/> <input type="button" value="Save & New"/> <input type="button" value="Save"/>	