

# 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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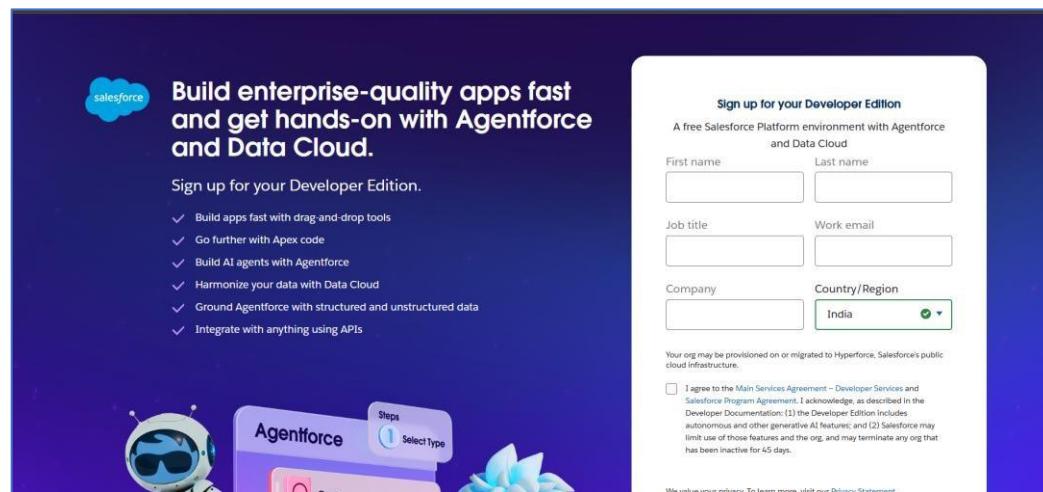
## MILESTONE -1

### 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:



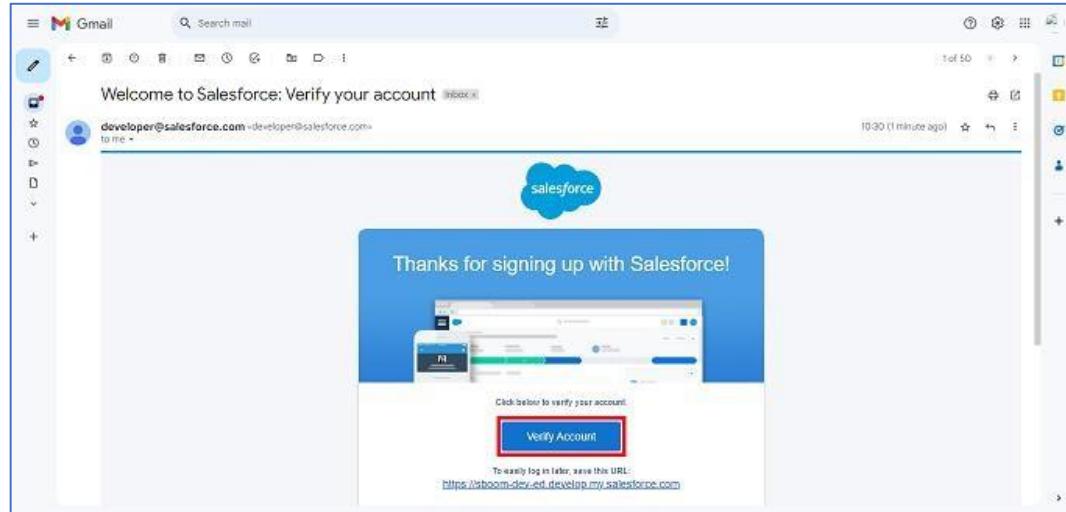
- **FIRST NAME:** Sukanya
- **LAST NAME:** Konduru
- **JOB TITLE:** Developer
- **WORK Email:** KONDURUSUKANYA103@GMAIL.COM
- **COMPANY:** Gayatri Degree College Tirupati
- **COUNTRY/ REGION:** India

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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.

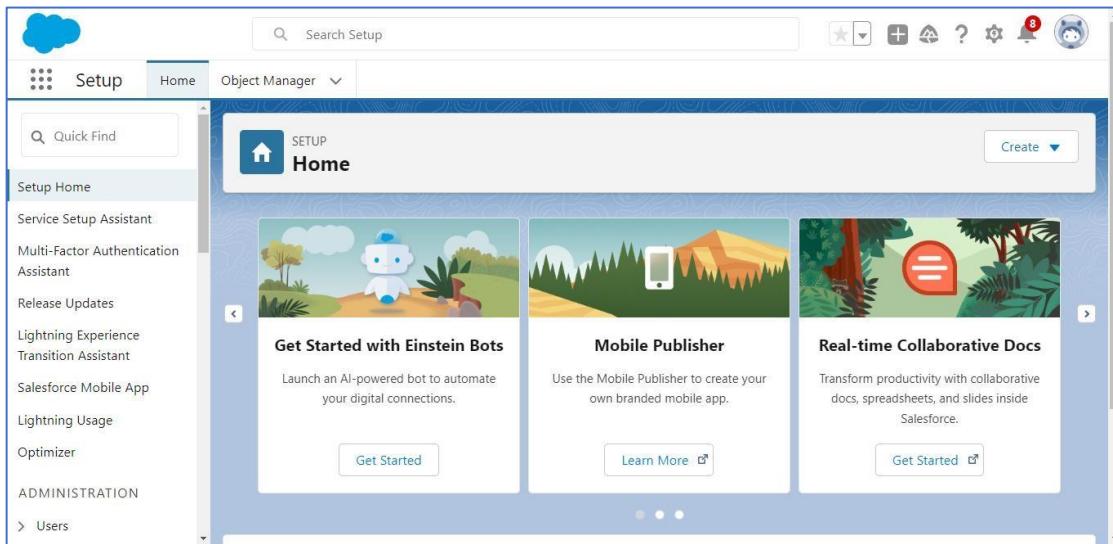


2. Click on Verify Account
3. Give a password and answer a security question and click on change password.

A screenshot of the Salesforce "Change Your Password" page. It asks for a new password for lead@sb.oom, 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 box. Below these are "Security Question" and "Answer" fields, and a "Change Password" button at the bottom, also highlighted with a red box.

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



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## MILESTONE – 2

### OBJECT

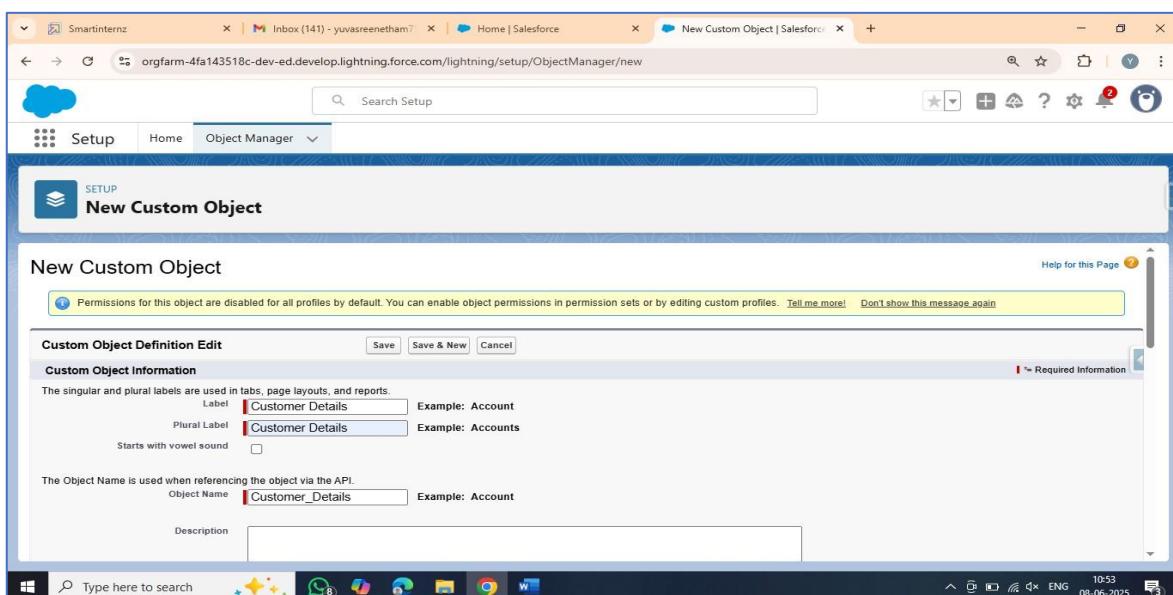
#### ACTIVITY – 1: Create Customer Details Object

To create an object:

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

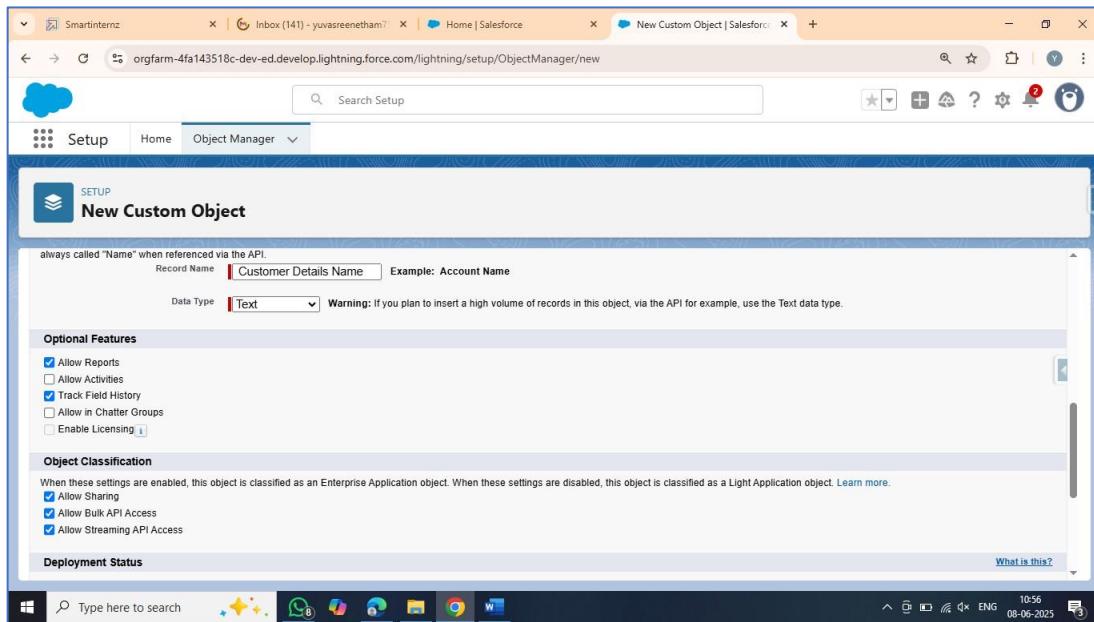


- Enter the label name >> Customer Details
- Plural label name >> Customer Details

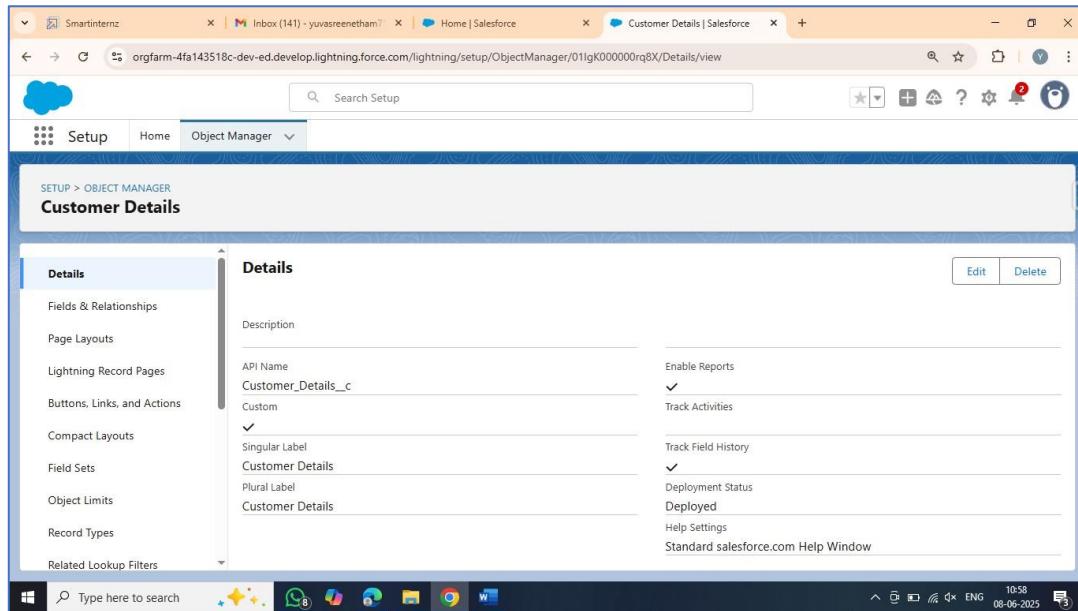


- Enter Record Name Label and Format
  - Record Name >> Customer Name
  - Data Type >> Text
- Click on Allow reports and Track Field History.

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7. Allow search >> Save.



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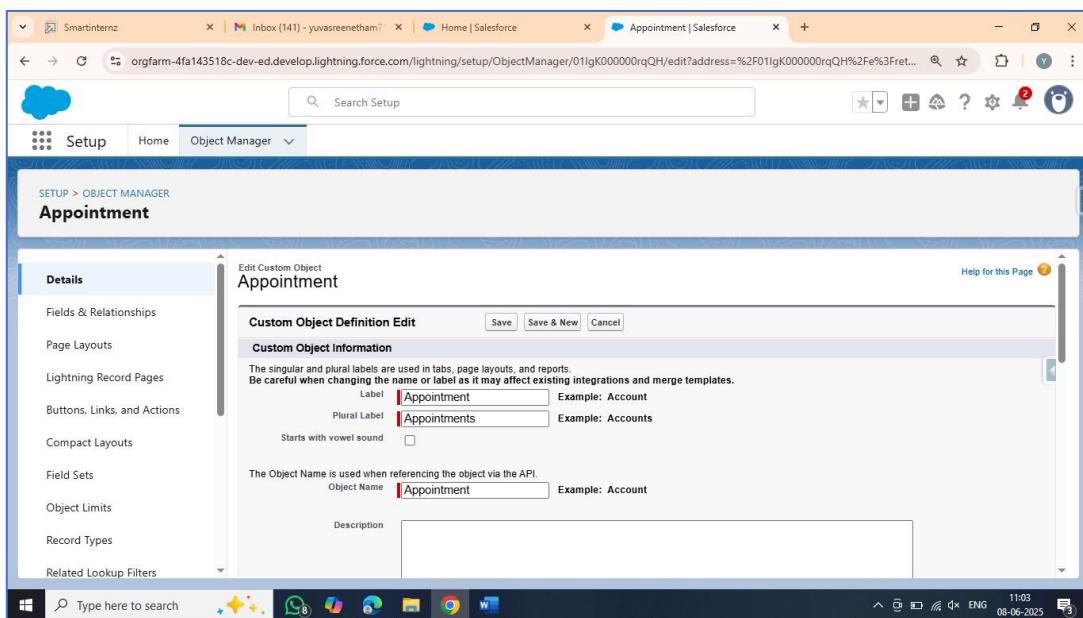
## ACTIVITY – 2 : Create Appointment Object

To create an object:

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

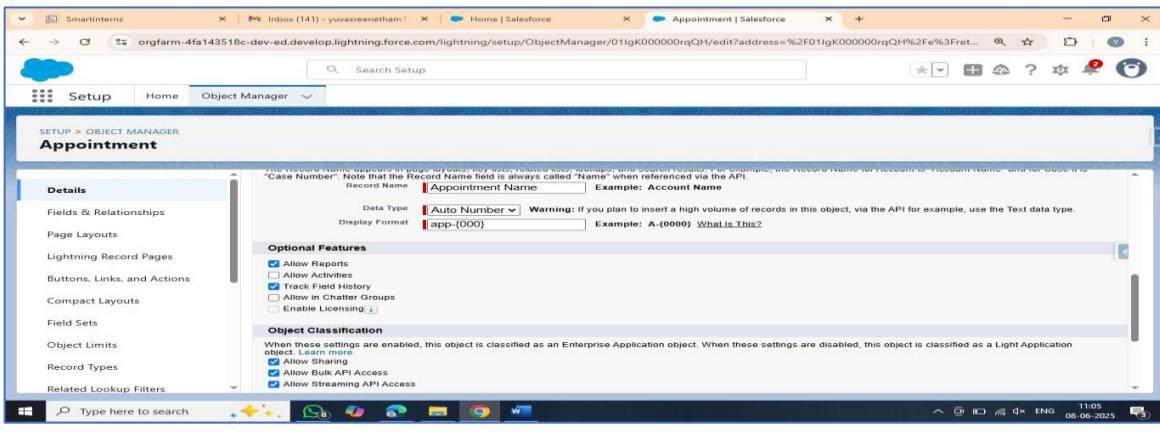


- Enter the label name >> Appointment
- Plural label name >> Appointments

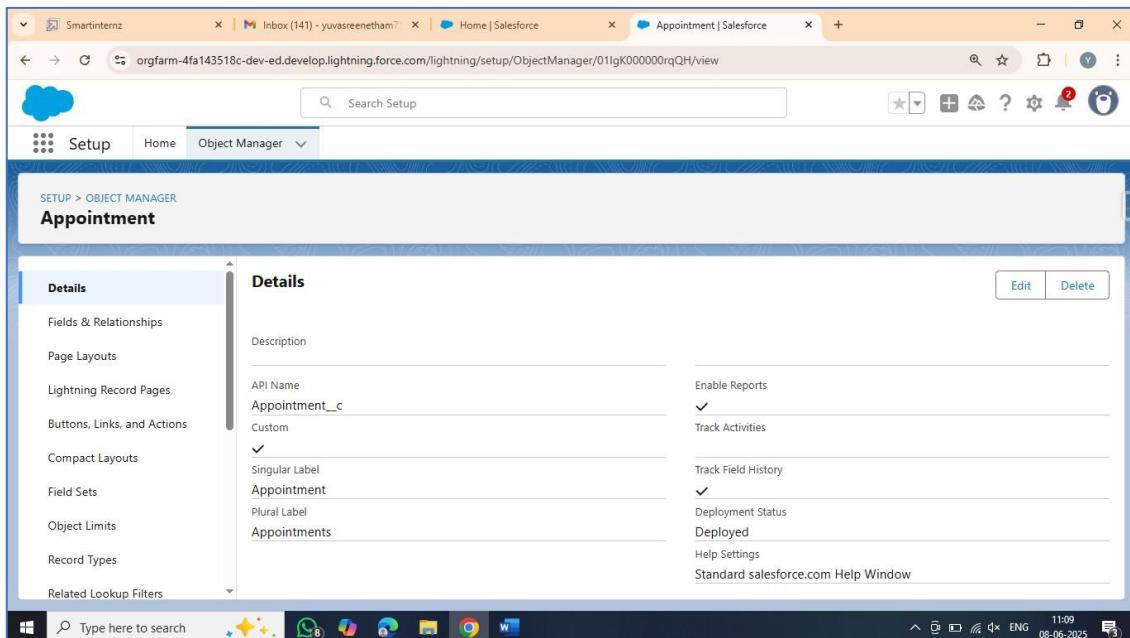
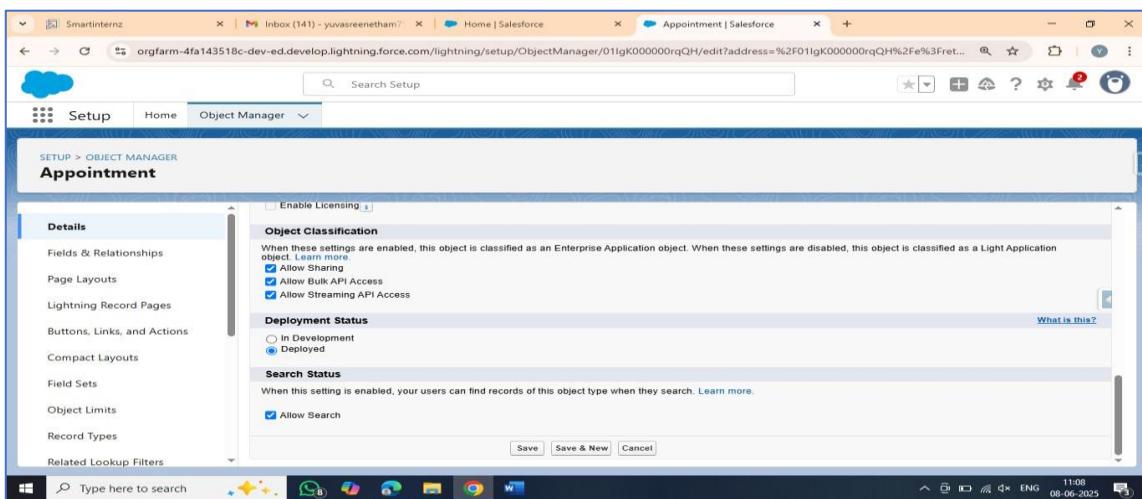


- Enter Record Name Label and Format
  - Record Name >> Appointment Name
  - Data Type >> Auto Number
  - Display Format >> app- {000}
  - Starting number >> 1
- Click on Allow reports and Track Field History.

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## 4. Allow search >> Save.



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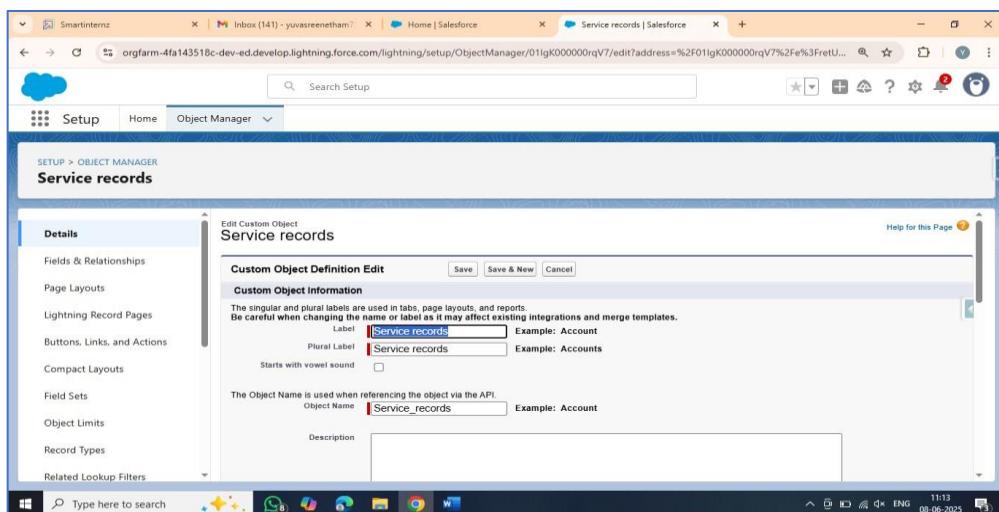
## ACTIVITY -3 :- Create Service records Object

### To create an object:

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

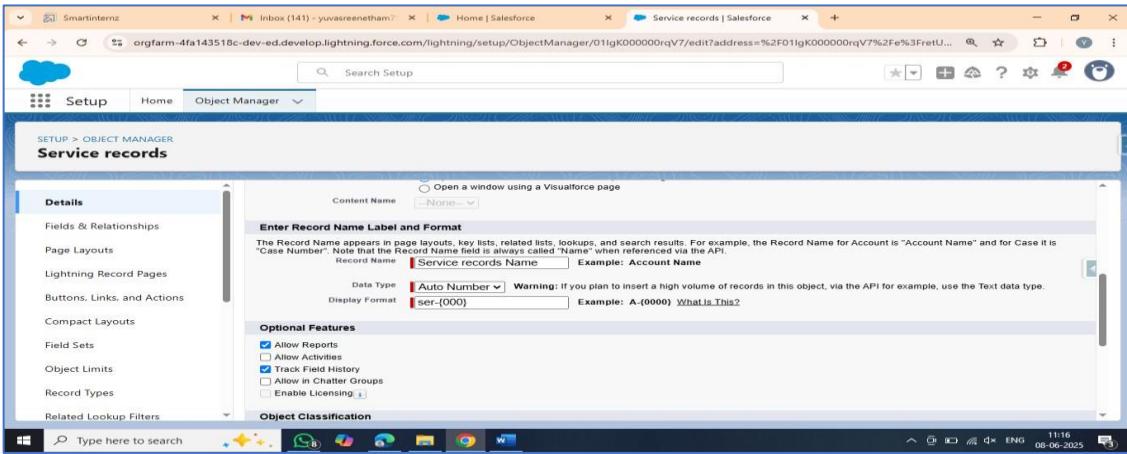


- Enter the label name >> Service records
- Plural label name >> Service records

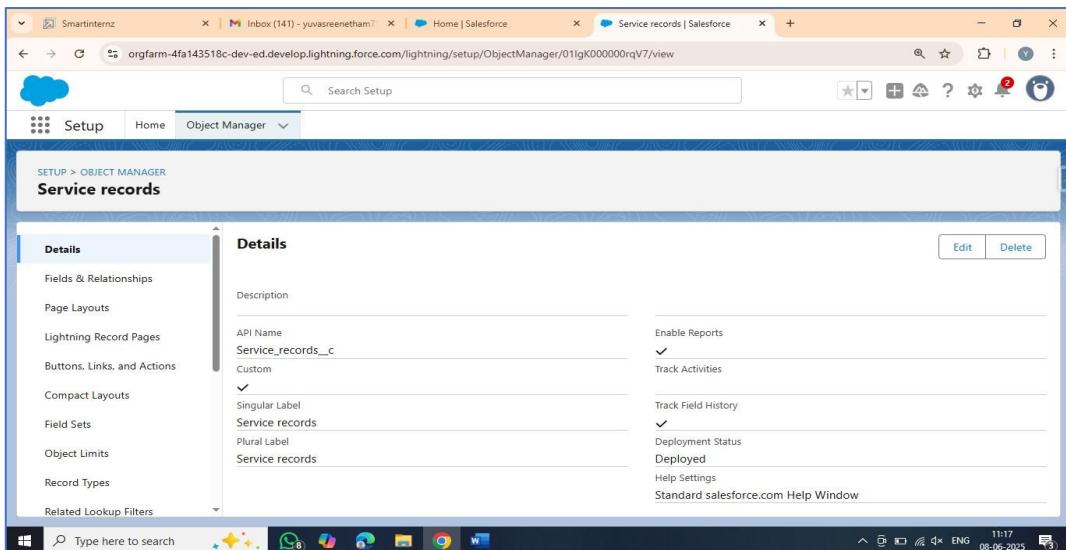
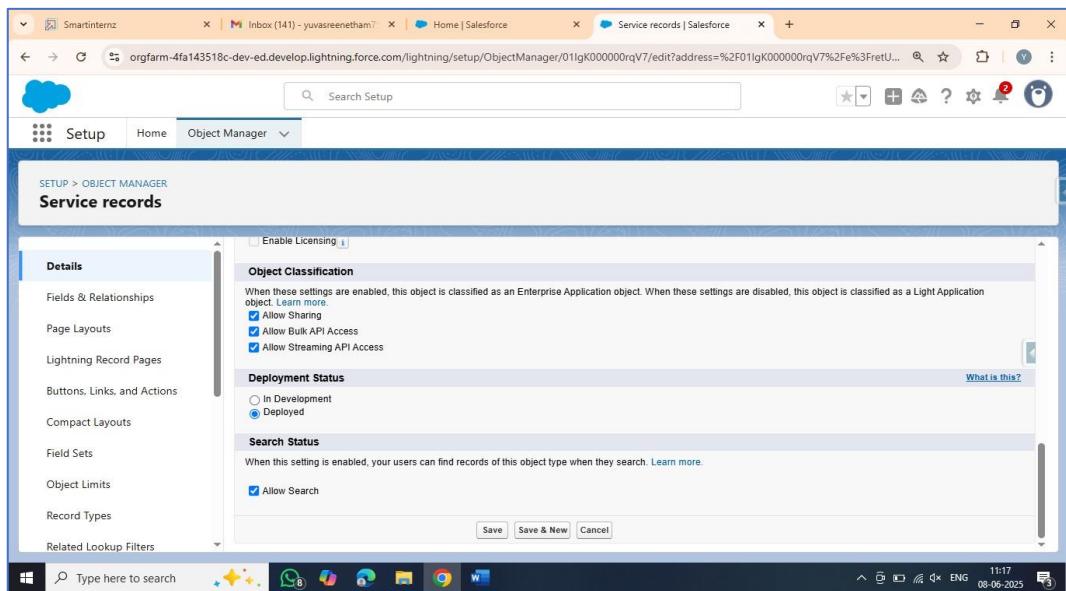


- Enter Record Name Label and Format
  - Record Name >> Service records Name
  - Data Type >> Auto Number
  - Display Format >> ser- {000}
  - Starting number >> 1
- Click on Allow reports and Track Field History,

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## 6. Allow search >> Save.



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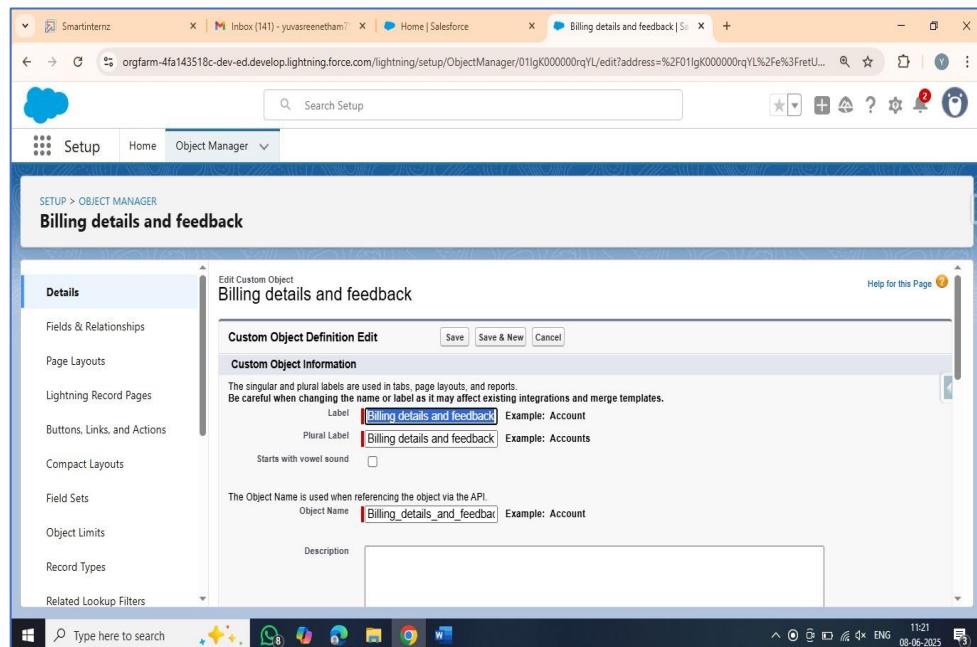
## ACTIVITY – 4: Create Billing details and feedback Object

### To create an object:

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

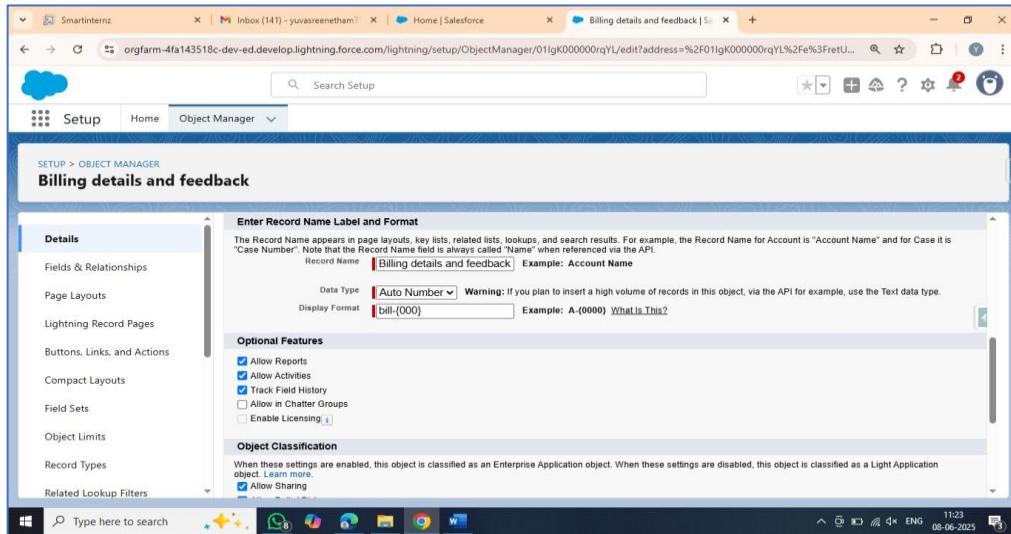


- Enter the label name >> Billing details and feedback
- Plural label name >> Billing details and feedback
- Enter Record Name Label and Format

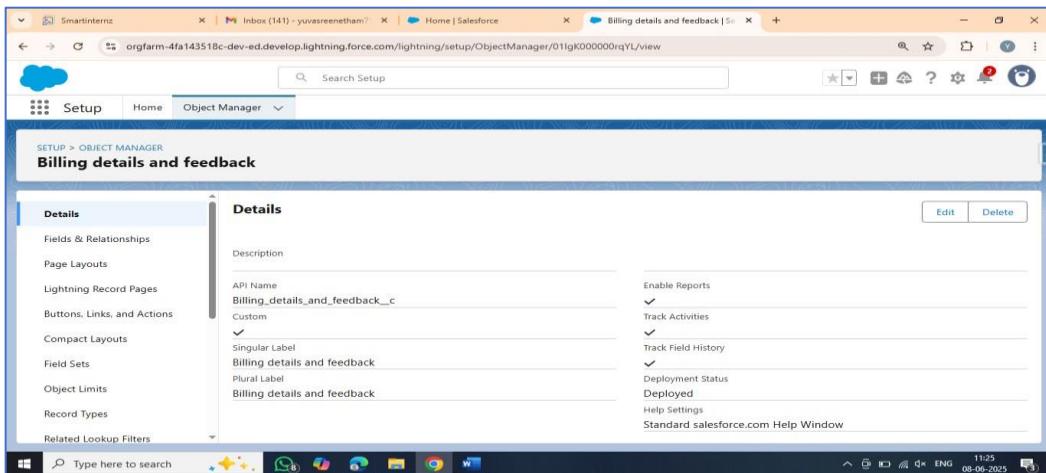
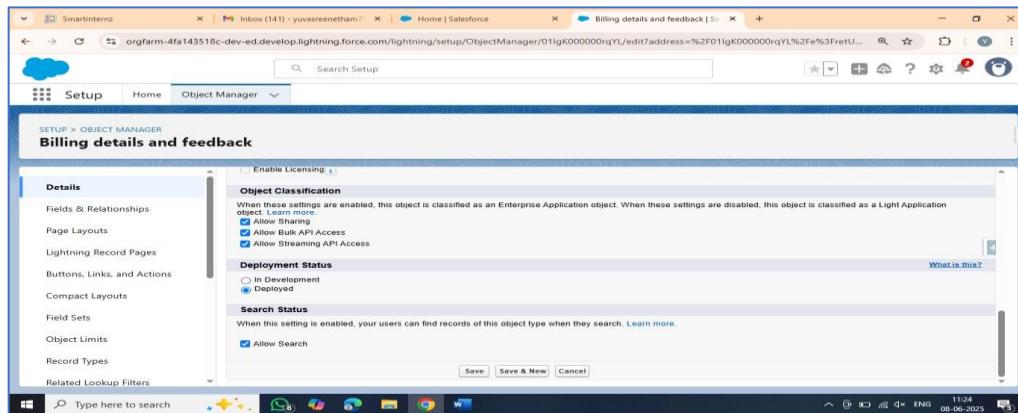


- Record Name >> Billing details and feedback Name
  - Data Type >> Auto Number
  - Display Format >> bill- {000}
  - Starting number >> 1
- Click on Allow reports and Track Field History,

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## 5. Allow search >> Save.



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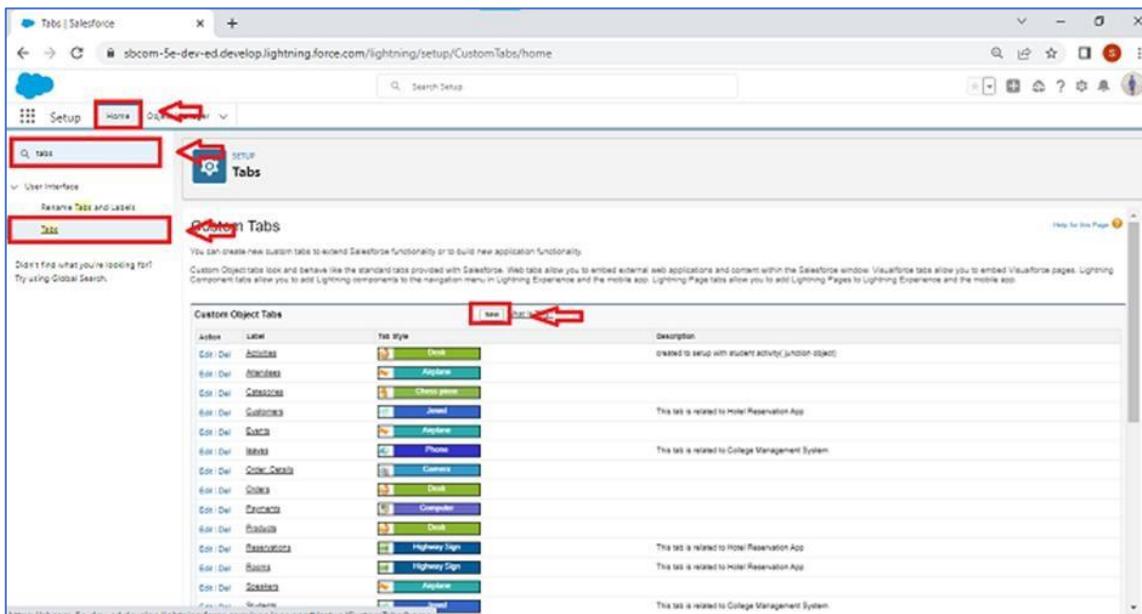
## MILESTONE -3

### 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)	<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

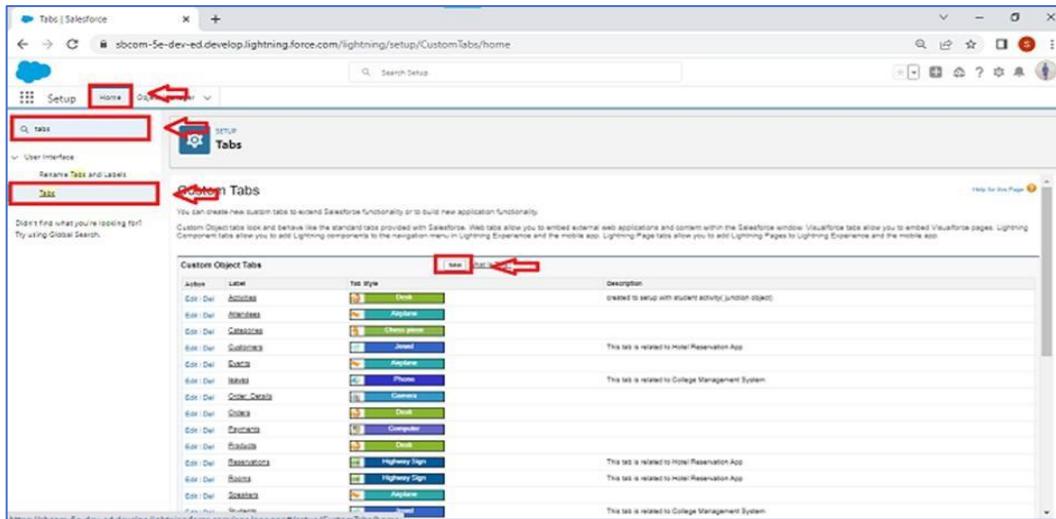
➡  Previous  Save  Cancel ➡

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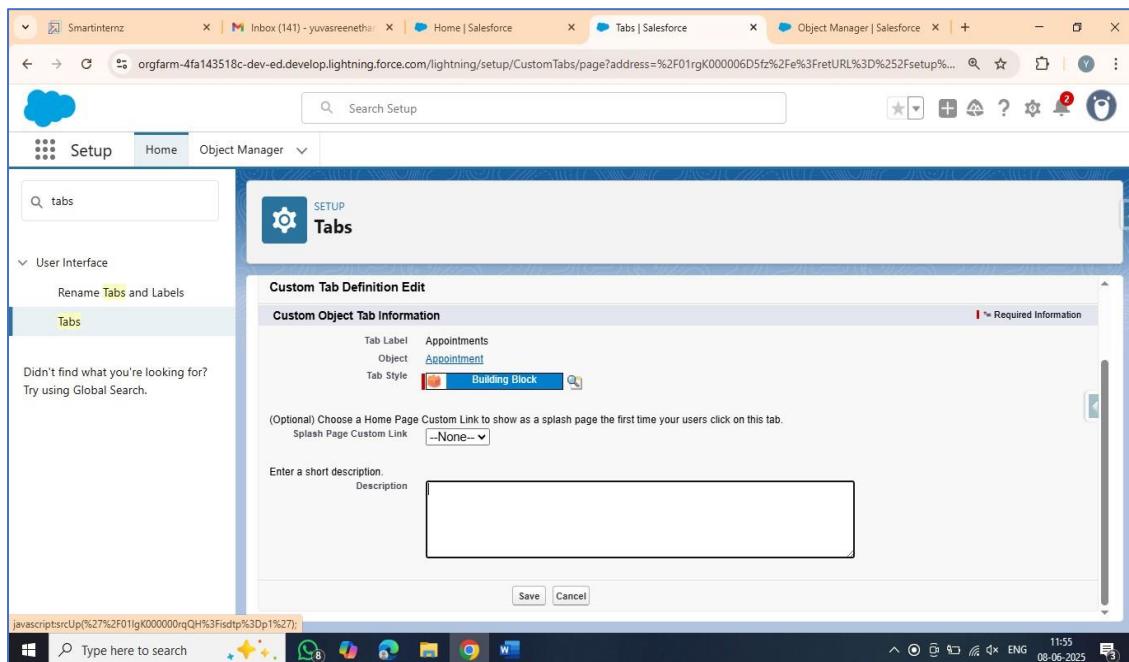
## ACTIVITY – 2: Creating Remaining Tabs

### 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

→ ↓

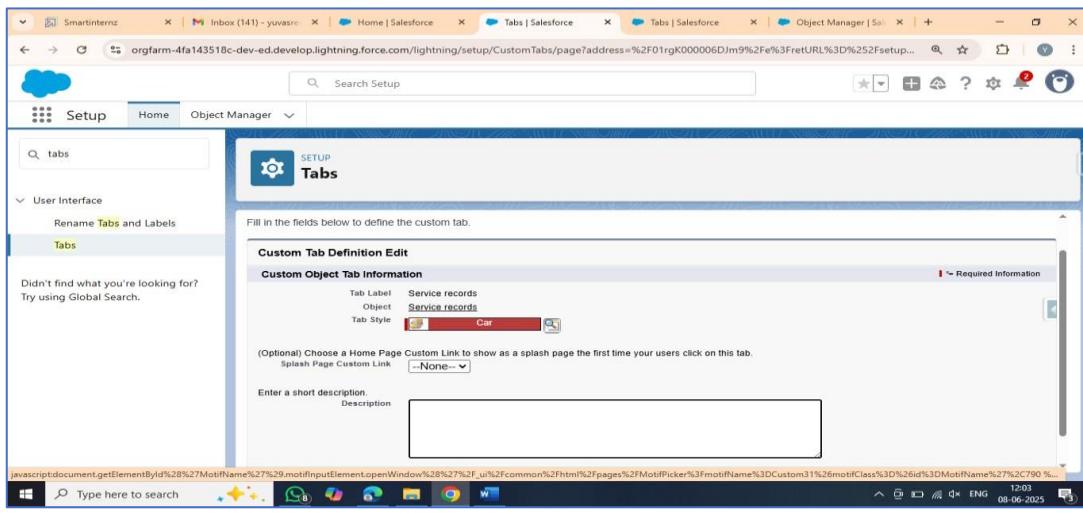
Previous Save Cancel

# GARAGE MANAGEMENT SYSTEM

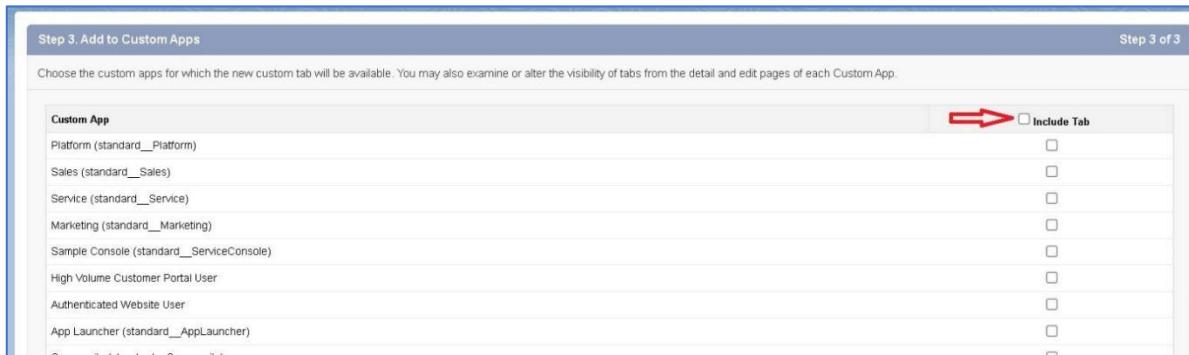
## ACTIVITY -3 :- SERVICE RECORDS

### To create a Tab:(Service records)

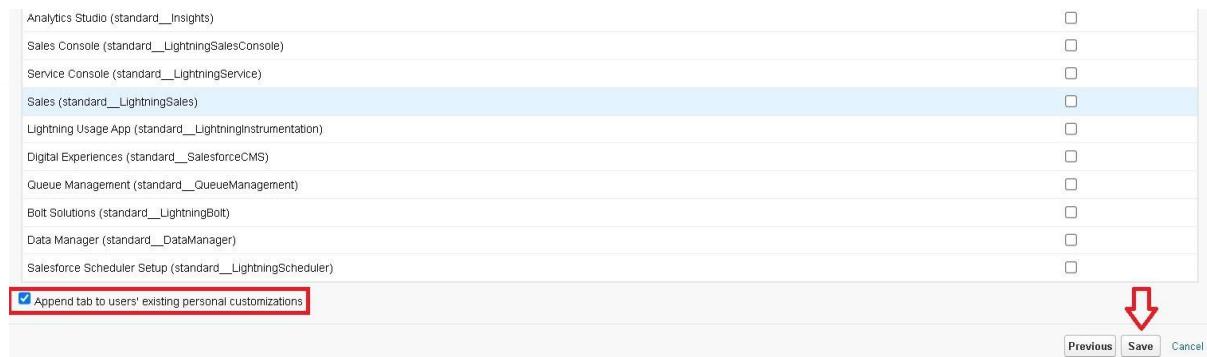
- Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
- Select Object (Service records) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab.



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



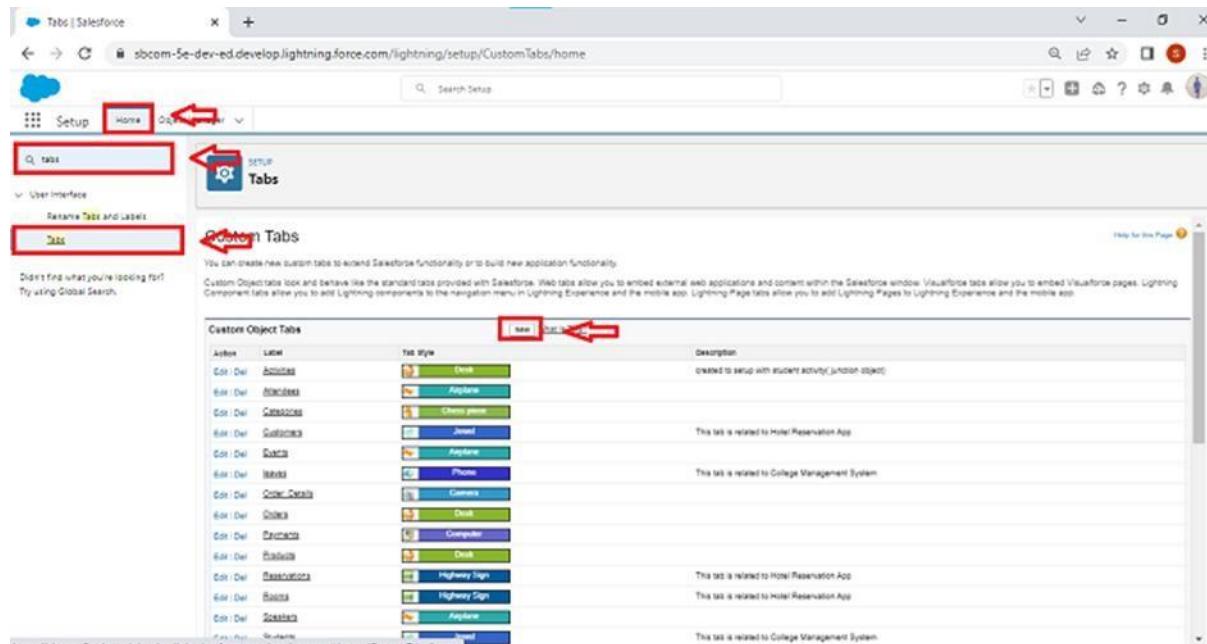
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## ACTIVITY – 4:- BILLING DETAILS AND FEEDBACK

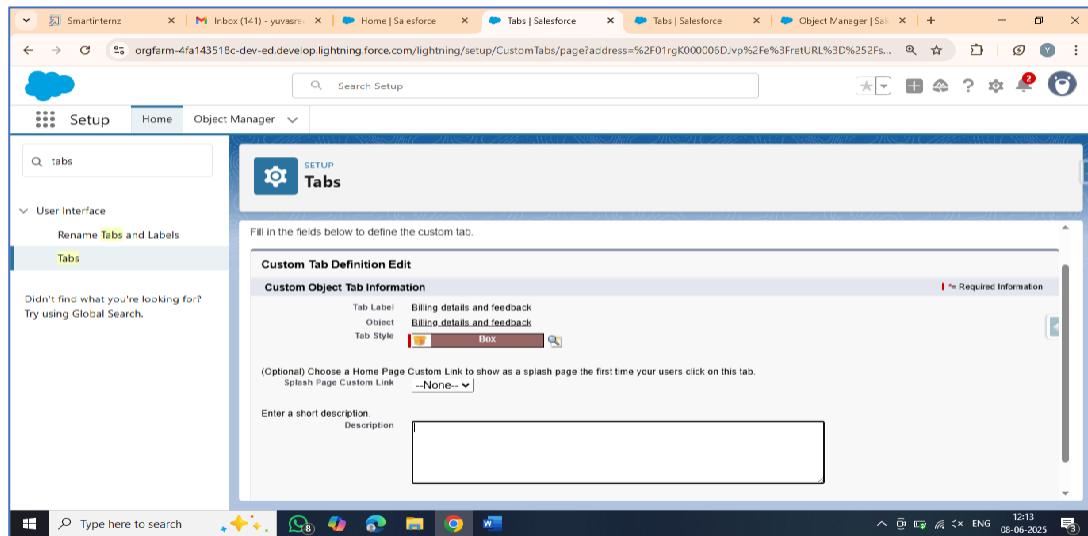
### To create a Tab:(Billing details feedback)

- 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"/>

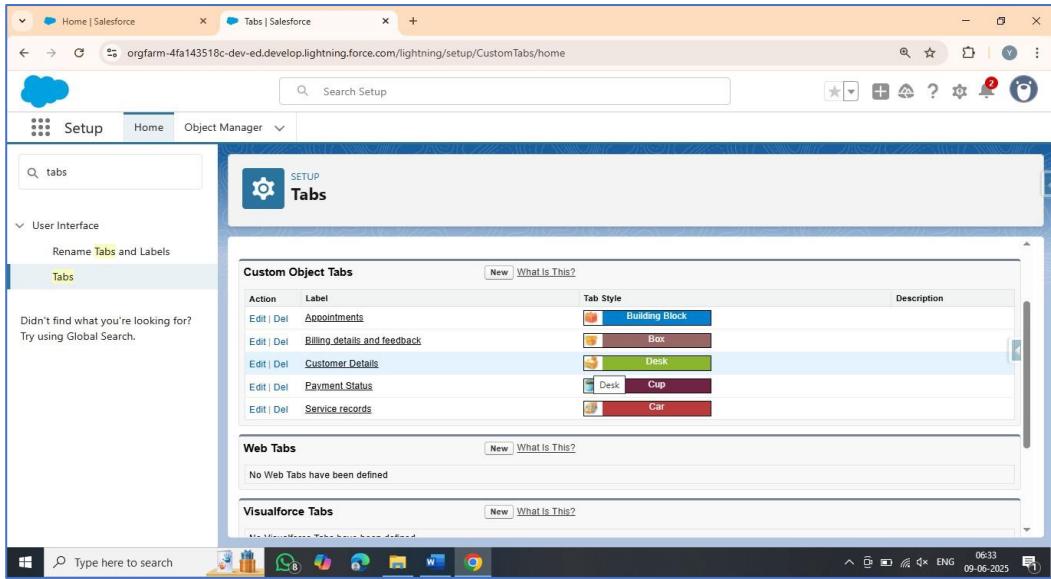
**Step 3. Add to Custom Apps**

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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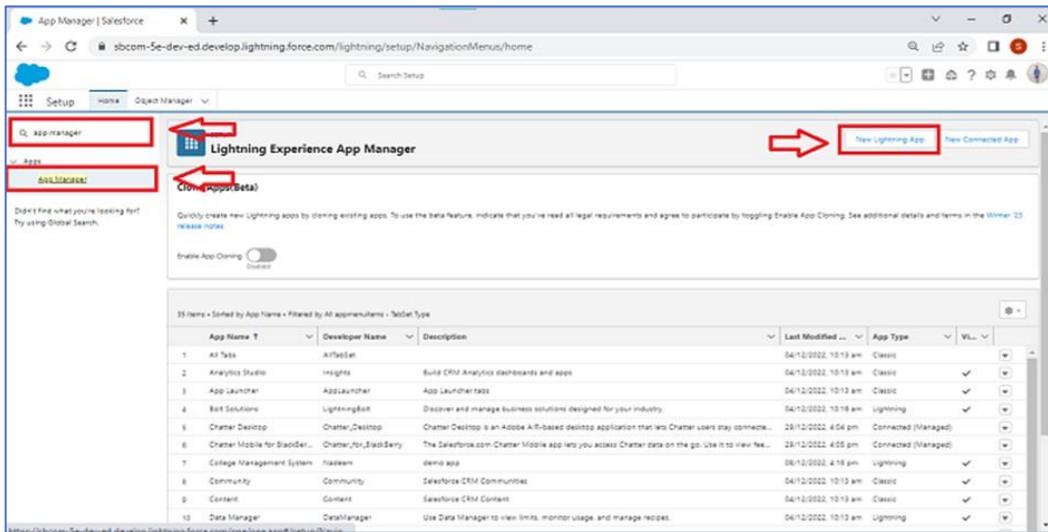
# GARAGE MANAGEMENT SYSTEM

## 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.



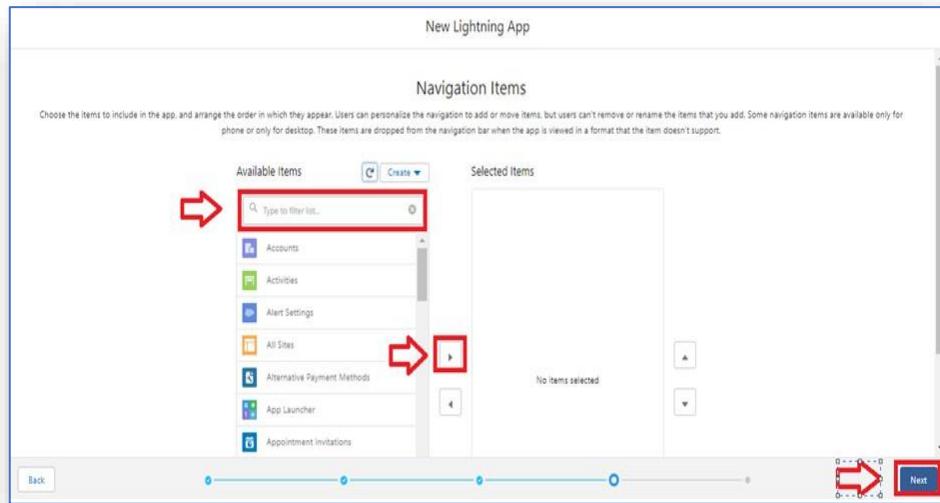
- Fill the app name in app details as Garage Management Application >> Next >> (App option page) keep it as default >> Next >> (Utility Items) keep it as default >> Next.

The screenshot shows the 'New Lightning App' configuration page. The 'App Details & Branding' section is visible, containing fields for 'App Name' (with a red box highlighting the input field), 'Developer Name', and 'Description'. To the right, there are sections for 'App Branding' (including 'Image' and 'Primary Color Hex Value') and 'Org Theme Options'. At the bottom right of the page, a red box highlights the 'Next' button.

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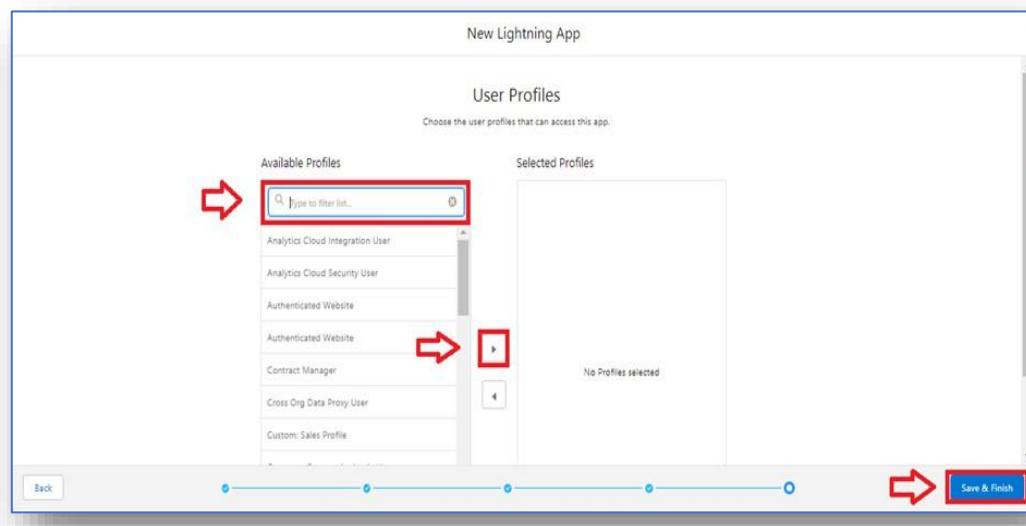
To Add Navigation Items:

- 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	✓

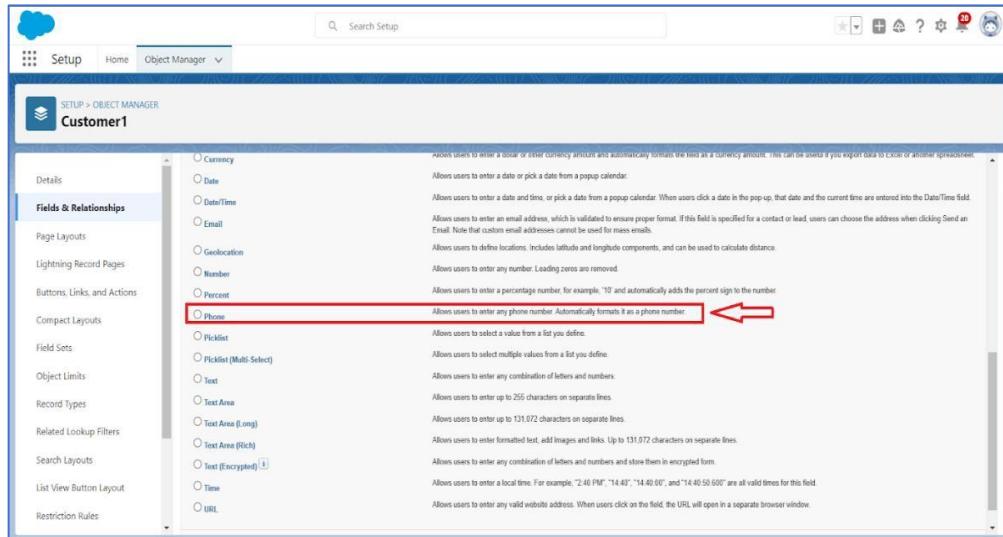
- Now click on "Fields & Relationships" >> New

The screenshot shows the "Fields & Relationships" page for the "Customer" object. 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: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. A red arrow points to the "New" button at the top right of the table header. The table contains several field entries, such as "Created By", "current\_Status\_\_c", "Customer Name", "Email Id", etc.

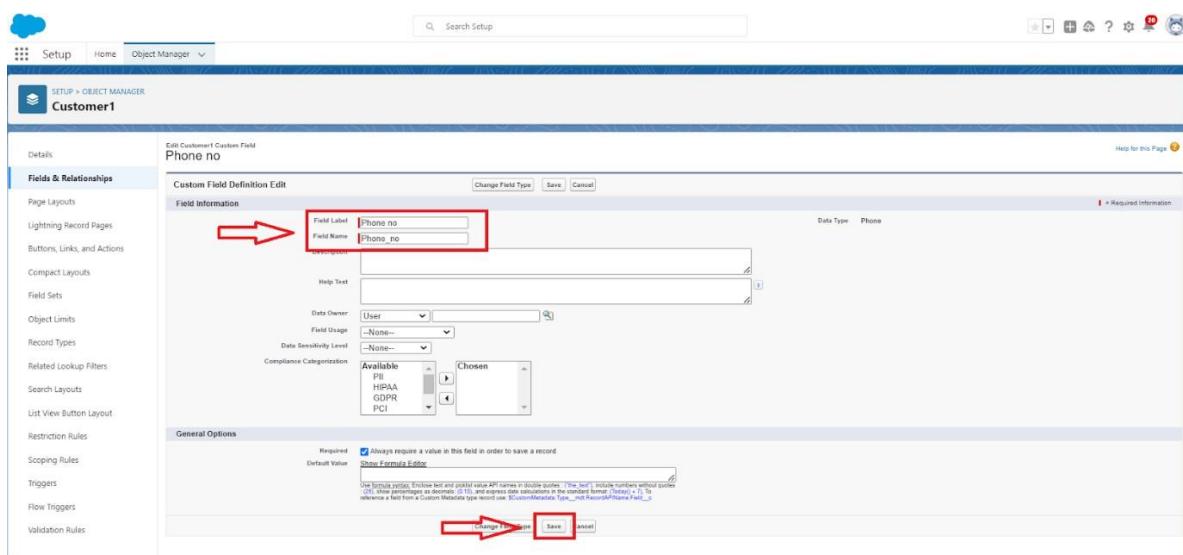
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
current_Status__c	current_Status__c	Picklist		
Customer Name	Name	Text(80)		✓
Email Id	EmailId__c	Email (Unique)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Permanent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

- 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 below it.

- 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, Page Layouts, Lightning Record Pages, etc. The main area shows a table with columns: FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. Several fields are listed, including "Created By" (Lookup(User)), "current\_Status\_\_c" (Picklist), "Customer Name" (Text(80)), "Email Id" (Email (Unique)), "Last Modified By" (Lookup(User)), "Owner" (Lookup(User,Group)), "Permanent Address" (Text Area(255)), and "Phone no" (Phone). A red arrow points to the "New" button at the top right of the table.

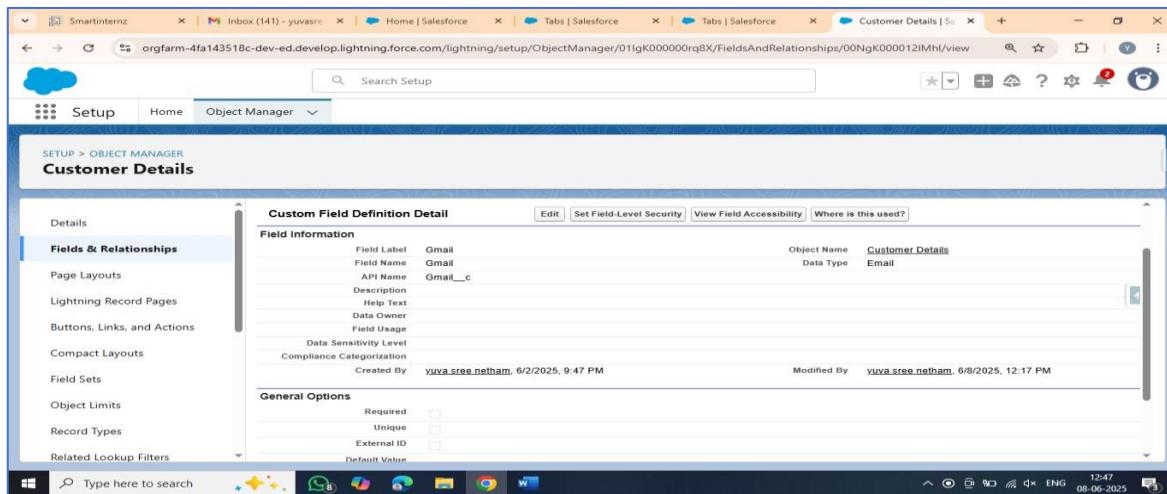
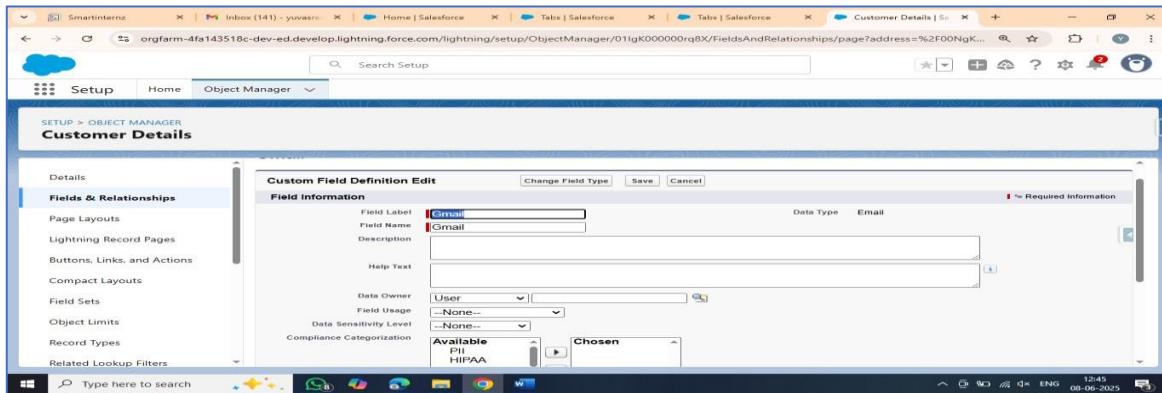
- Select Data Type as a "Email"

The screenshot shows the "Customer Details" object creation screen. The left sidebar lists "Details" and "Fields & Relationships". The main area shows a list of field types with their descriptions: Currency, Date, Date/Time, Email, Geolocation, Number, Percent, Phone, Picklist, Picklist (Multi-Select), Text, Text Area, and Text Area (Long). The "Phone" option is selected. A detailed description of the "Phone" field is shown on the right, stating it allows users to enter any phone number and automatically formats it as a phone number.

- 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', and a search bar with 'app'. Below the header, the title 'Object Manager' is displayed with a note '7 Items. Sorted by Label'. A table lists four objects: Appointment, Appointment Category, Appointment Invitation, and Appointment Invitee. The 'Appointment' row is highlighted with a red border. The columns are labeled 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', 'LAST MODIFIED', and 'DEPLOYED'.

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

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

The screenshot shows the 'Fields & Relationships' section for the Appointment object. The left sidebar has tabs for 'Details', 'Fields & Relationships' (which is selected and highlighted with a red box), 'Page Layouts', 'Lightning Record Pages', and 'Relationships (Child and Master)'. The main area is titled 'Fields & Relationships' with a sub-note '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) and 'Appointment Name' (Name, Auto Number type). A red box highlights the 'New' button in the top right corner of the table header.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment Date	Appointment_Date__c	Date		
Appointment Name	Name	Auto Number		✓

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

The screenshot shows the 'Data Type' selection 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 checked. The 'next' button is visible at the bottom right.

- 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.

The screenshot shows the Salesforce Object Manager interface. In the search bar at the top right, 'SERV' is typed. Below the search bar, there is a table with columns: LABEL, API NAME, TYPE, and DESCRIPTION. The 'Service records' object is listed with the following details:

LABEL	API NAME	TYPE	DESCRIPTION
Service records	Service_records_c	Custom Object	6/8/2025

On the right side of the table, there are two buttons: 'ED' and 'DEPLOYED'. A status bar at the bottom right indicates the date and time: 12:58 08-06-2025.

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

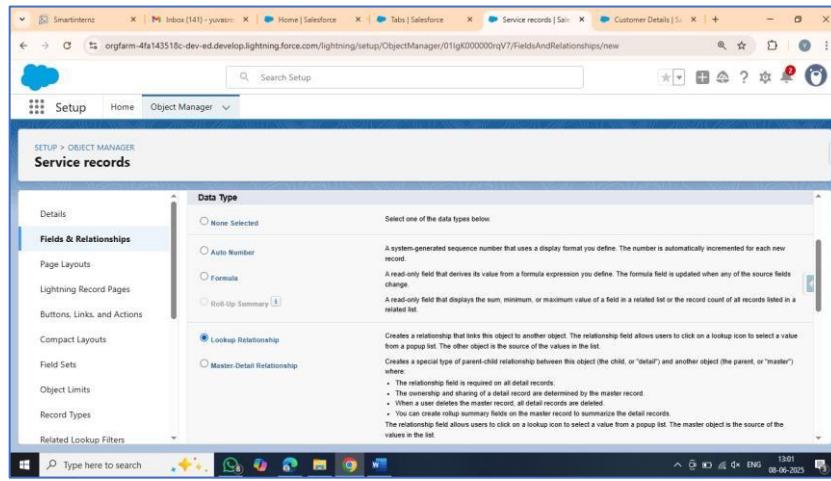
The screenshot shows the 'Fields & Relationships' section of the 'Service records' object in the Object Manager. On the left, there is a sidebar with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, and Related Lookup Filters. The 'Fields & Relationships' section is selected. At the top of this section, there is a table header with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. Below the header, there is a list of fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment	Appointment_c	Lookup(Appointment)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Quality Check Status	Quality_Check_Status_c	Checkbox		
Record Types	service date	service_date_c	Formula (Date)	

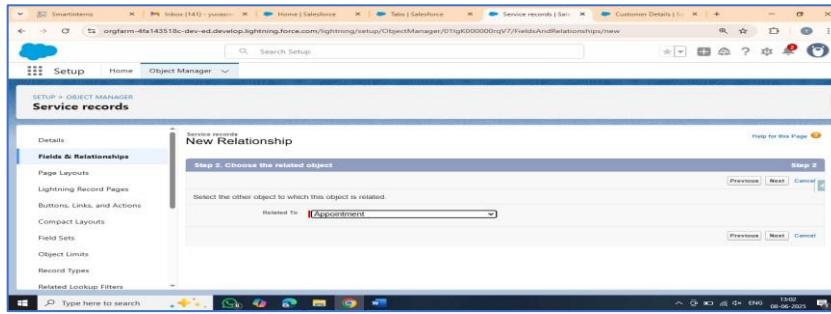
A status bar at the bottom right indicates the date and time: 12:59 08-06-2025.

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

## GARAGE MANAGEMENT SYSTEM



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

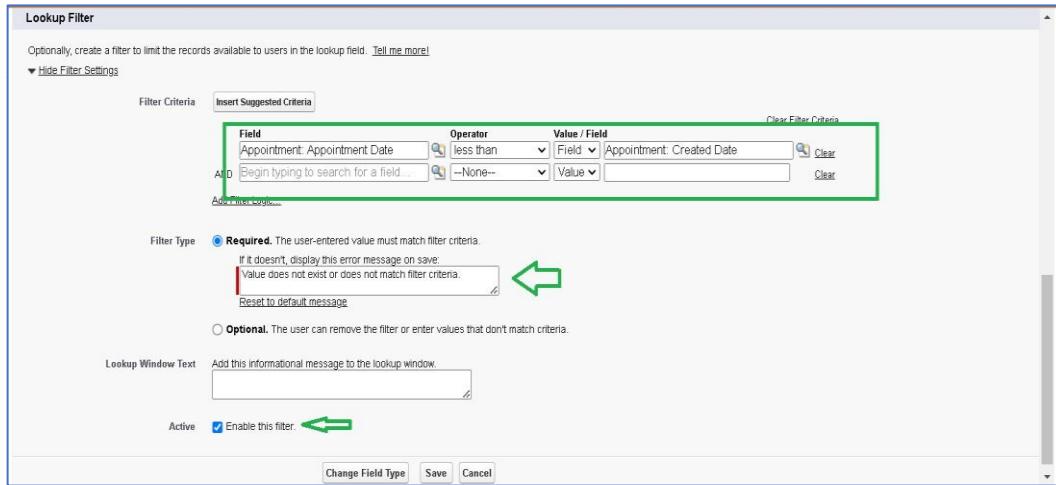


- Make it a required field so click on Required.



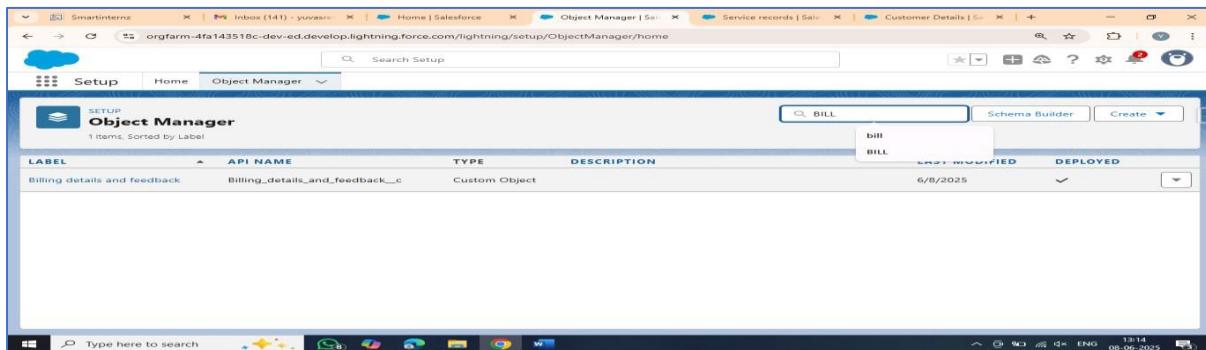
- Scroll down for Lookup Filter and click on Show filter settings.
- Now add the filter criteria.
- Field: Appointment: Appointment Date >> Operator: less than >> select field >> Appointment: Created Date
- Filter type should be Required.
- Error Message: Value does not match the criteria.
- Enable the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

# GARAGE MANAGEMENT SYSTEM

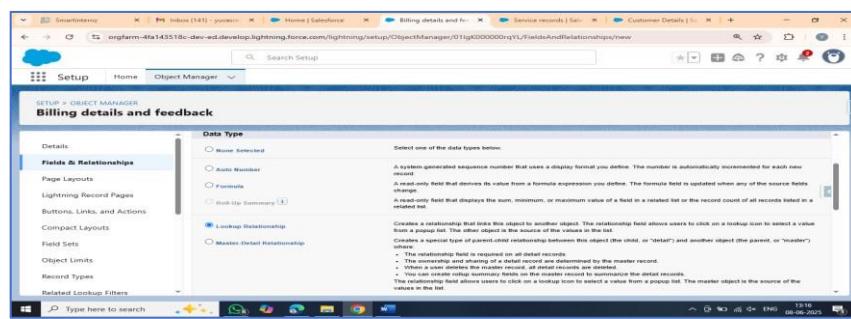


## Creation of Lookup Field on Billing details and feedback Object:

- 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** Next Cancel

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

**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 ready-made field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.

Rollup Summary A ready-made 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 special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") when:

- The relationship field is required on all detail records.
- The master object is the source of the values in the list.
- When a user edits the master record, all detail records are edited.
- When a user deletes the master record, all detail records are deleted.
- You can use the relationship field to sort and filter the detail records.
- The relationship field also allows users to click on a checkmark 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 Creates a relationship that links this object to an external object whose data is stored outside the SalesLogix org.

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

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

- 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

**Field Label:** Maintenance service   

**Default Value:**  Checked  Unchecked 

**Field Name:** Maintenance\_service 

**Description:** 

**Help Text:** 

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

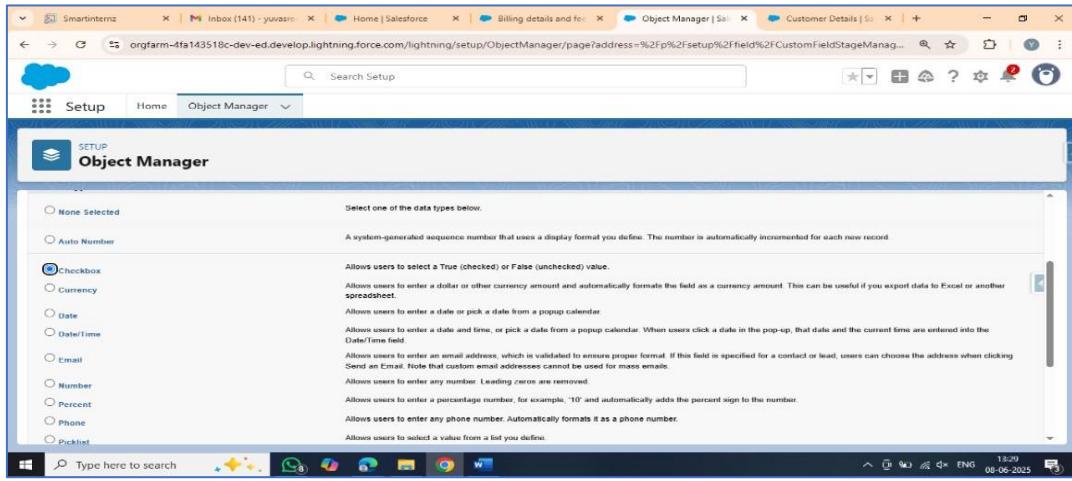
**Previous** **Next** **Cancel**

- Click on next >> next >> save.

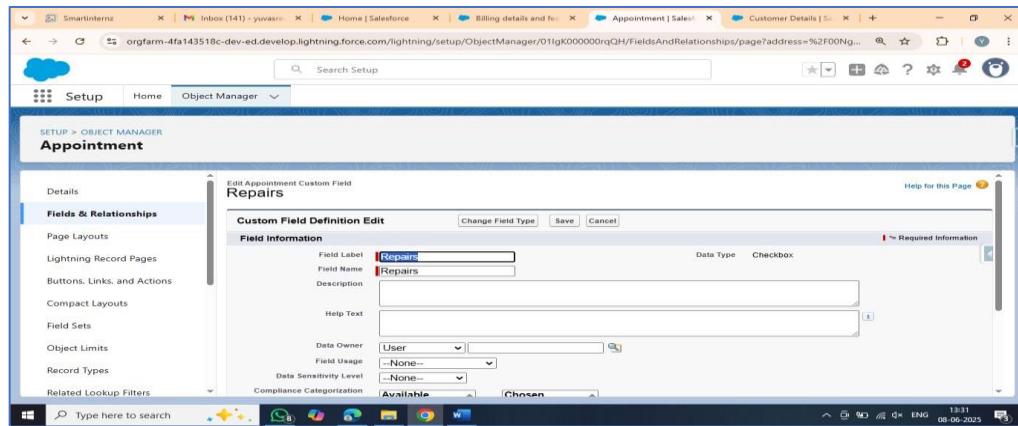
## **Creation of Another Checkbox Field on Appointment Object :**

- 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.

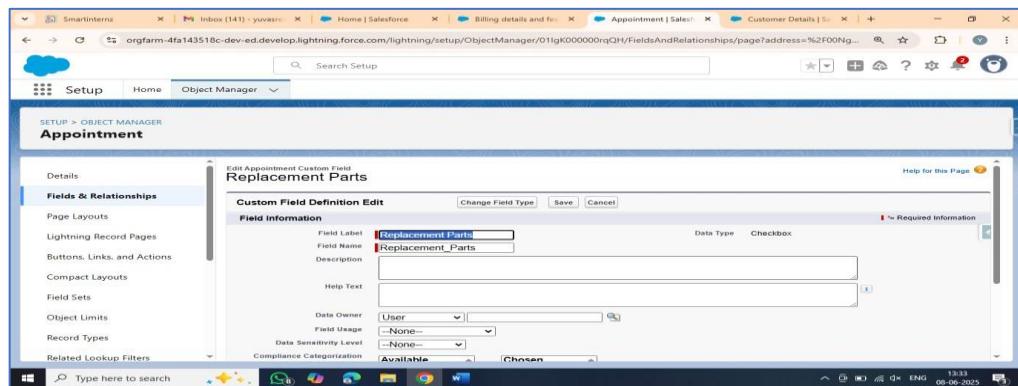
# GARAGE MANAGEMENT SYSTEM



- 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

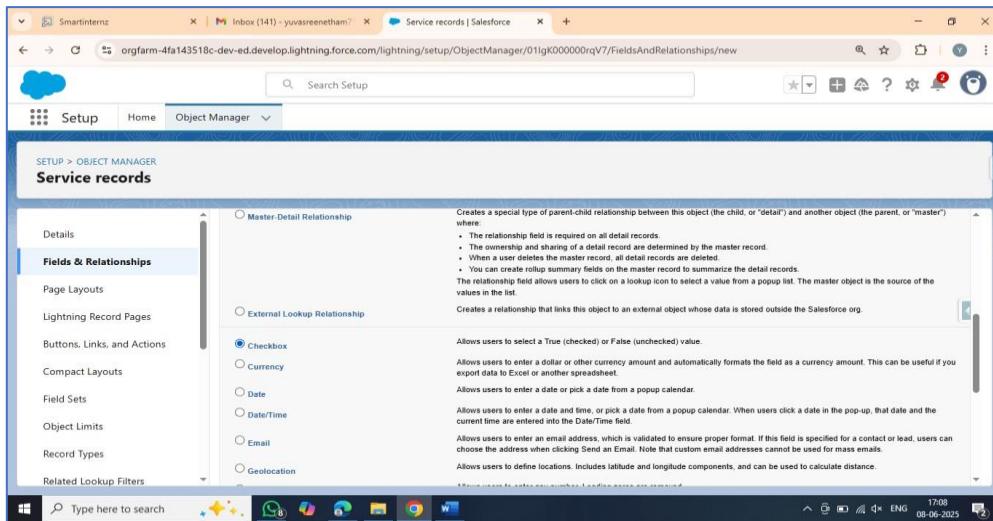


# GARAGE MANAGEMENT SYSTEM

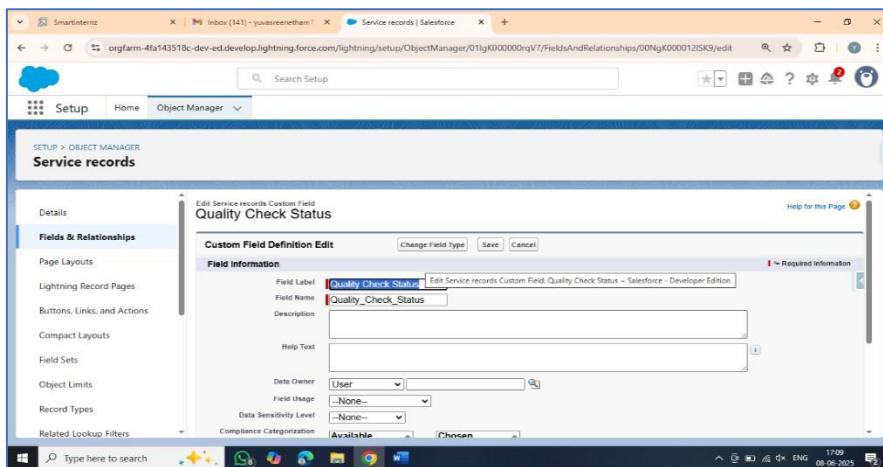
- Default value: unchecked
- Click on next >> next >> save.

## 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



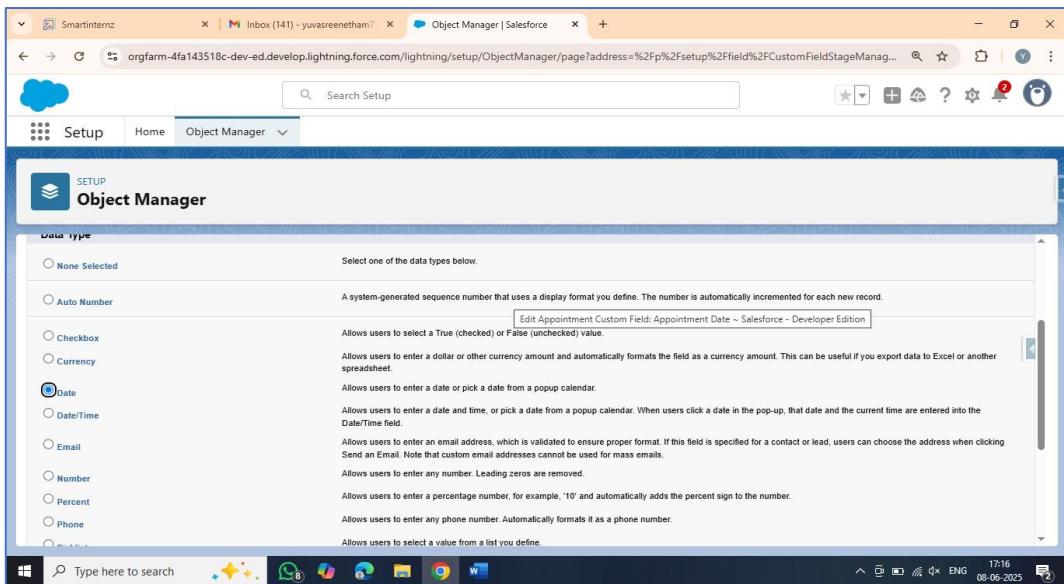
- Click on next >> next >> save.

# GARAGE MANAGEMENT SYSTEM

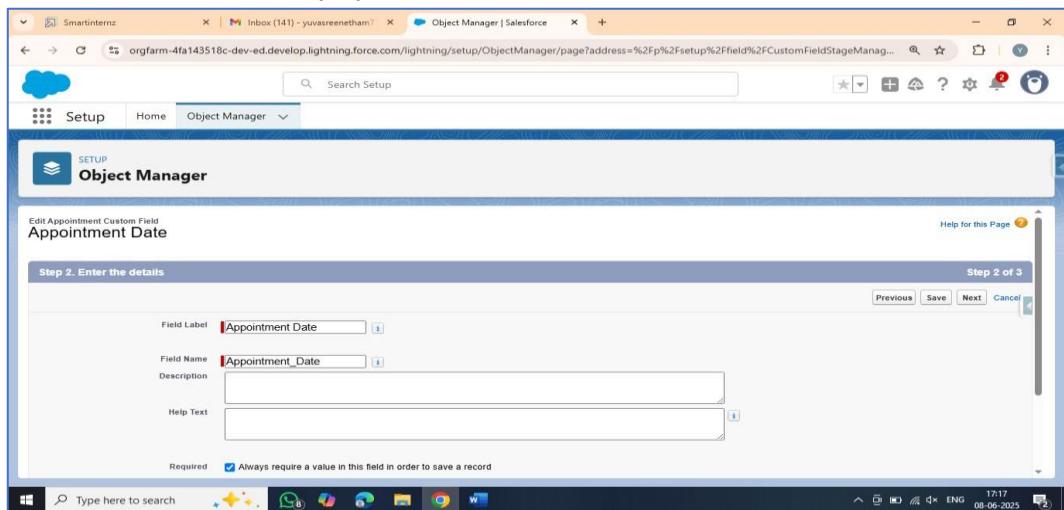
## ACTIVITY – 4 : Creation of date Fields

### 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

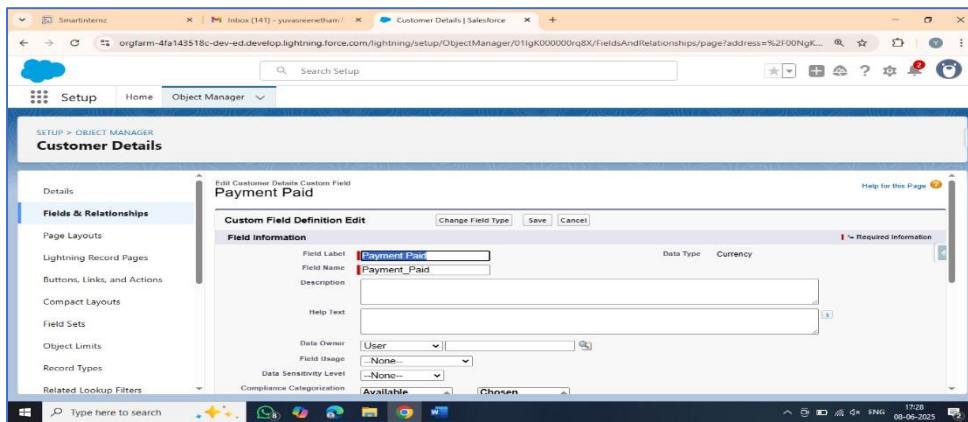
Previous Next Cancel

- 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

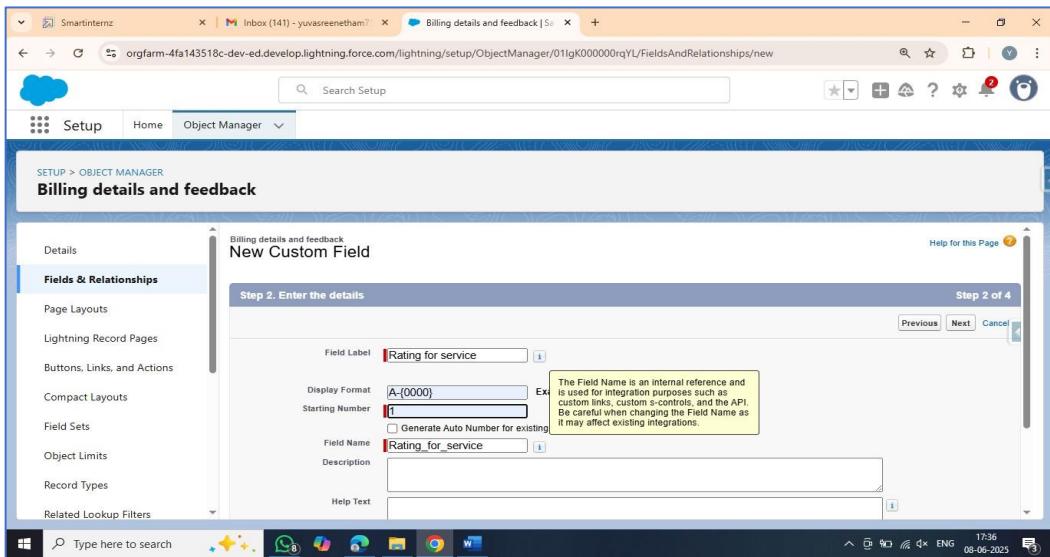
The screenshot shows the 'Step 2. Enter the details' dialog box. The 'Field Label' is set to 'Vehicle number plate'. The 'Length' is set to 10. The 'Field Name' is 'Vehicle\_number\_plate'. Under 'Required', the checkbox is checked. Under 'Unique', the checkbox is checked. There are two radio button options under 'External ID': 'Treat "ABC" and "abc" as duplicate values (case insensitive)' (selected) and 'Treat "ABC" and "abc" as different values (case sensitive)'. At the bottom, there are checkboxes for 'Set this field as the unique record identifier from an external system' and '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.

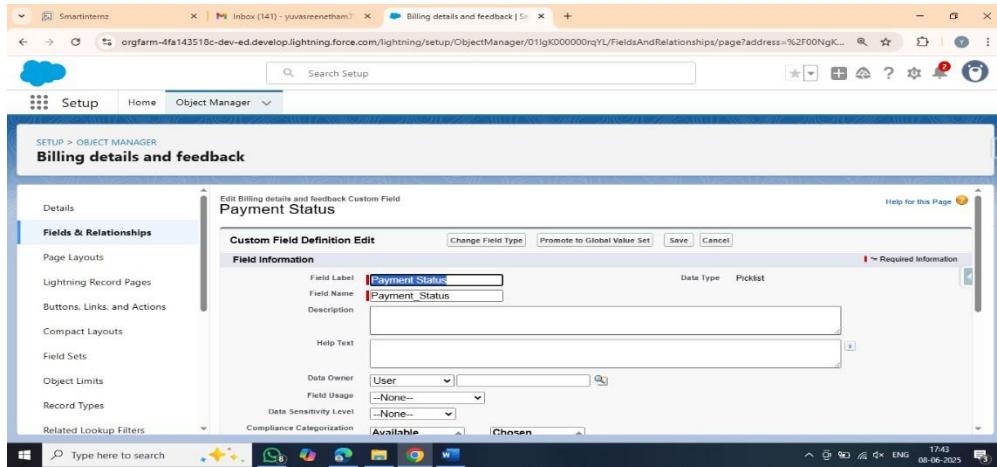


- Click Next.
- Next >> Next >> Save.

### **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.

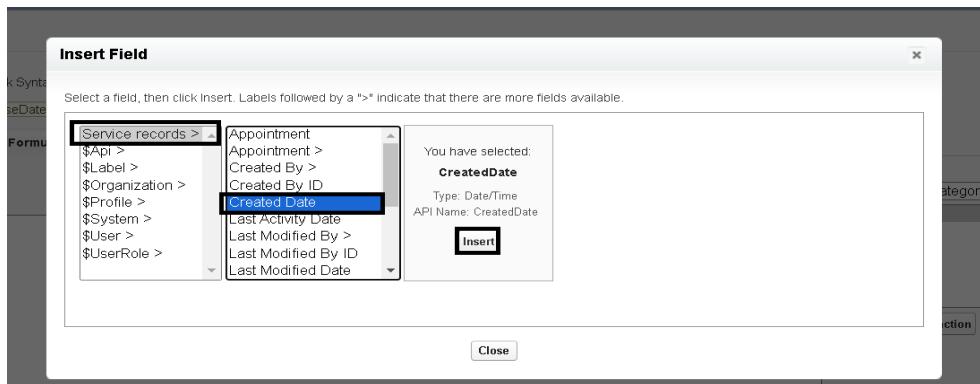
# GARAGE MANAGEMENT SYSTEM

## 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

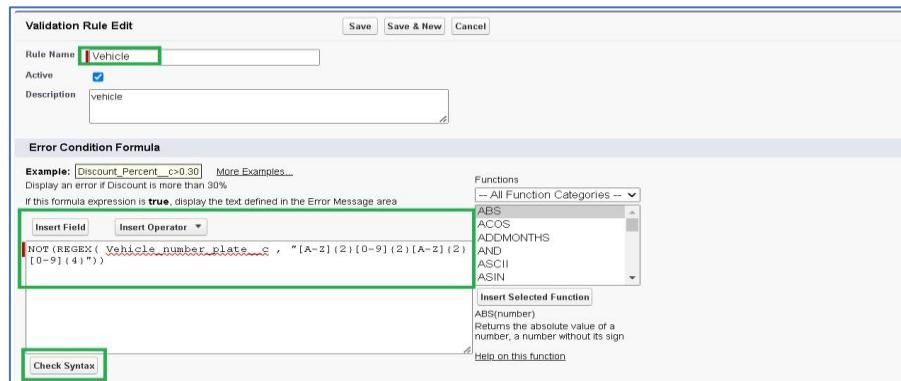
### Validation rule

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

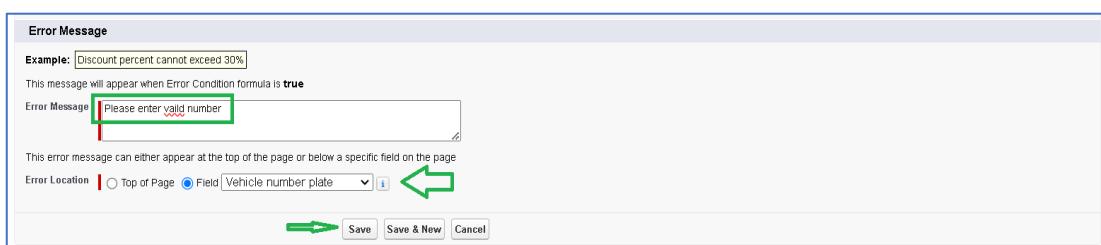
- Go to the setup page >> click on object manager >> From drop down click edit for Appointment object.
- Click on the validation rule >> click New.



- 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

Save Save & New Cancel

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 Insert Operator ▾

NOT( REGEX( Rating\_for\_service\_c , "[1-5]{1}" ))

Check Syntax

ABS  
ACOS  
ADDMONTHS  
AND  
ASCII  
ASIN

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

Help on this function

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

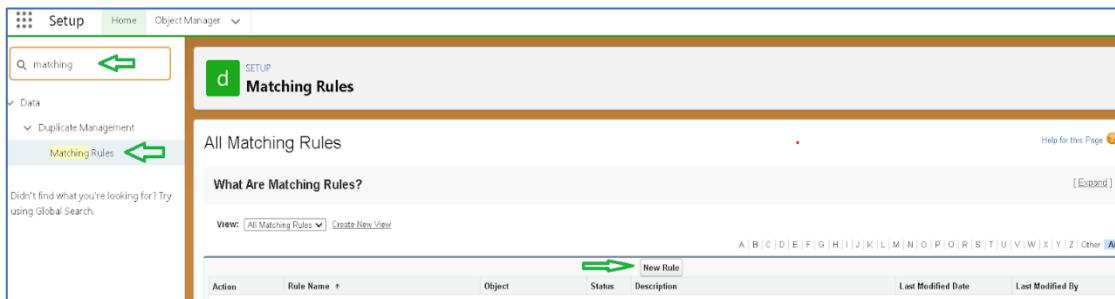
# GARAGE MANAGEMENT SYSTEM

## MILESTONE- 7

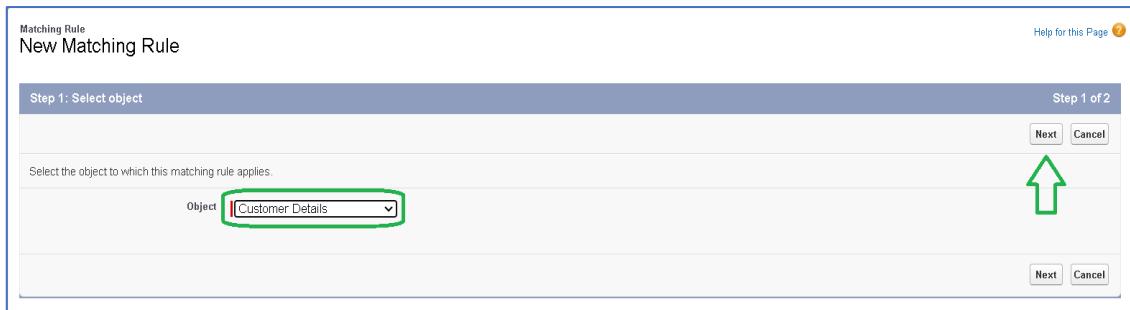
### Duplicate rule

#### 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"/>	AND

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 details 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	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	Allow <input checked="" type="radio"/> Alert <input type="checkbox"/> Report
Action On Edit	Allow <input checked="" type="radio"/> Alert <input type="checkbox"/> Report
Alert Text	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

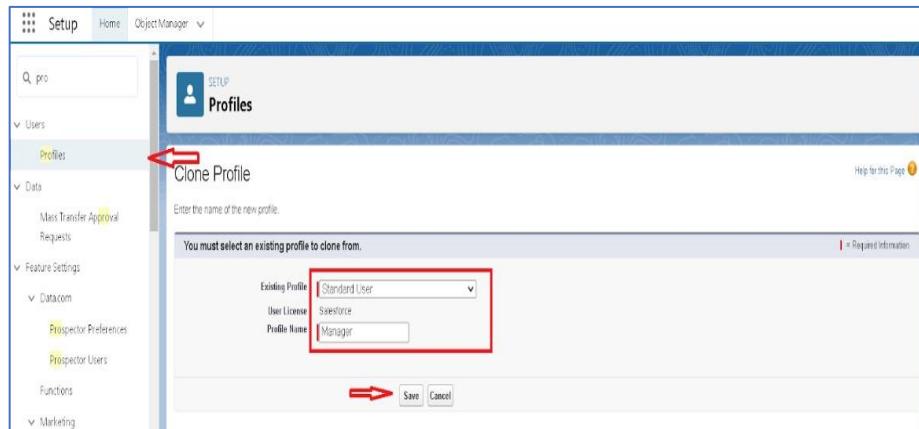
# GARAGE MANAGEMENT SYSTEM

## MILESTONE – 8

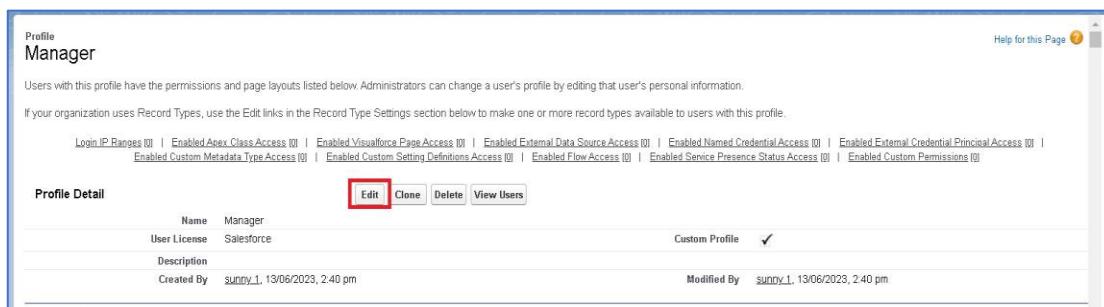
### Profiles

#### 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

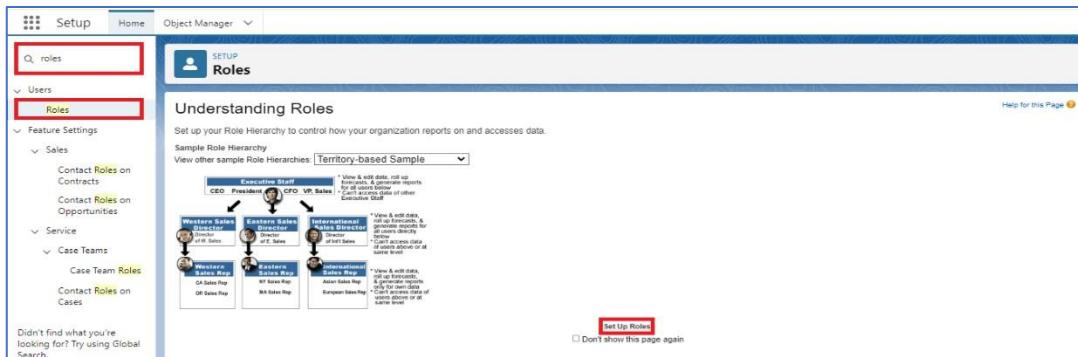
## MILESTONE – 9

### 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

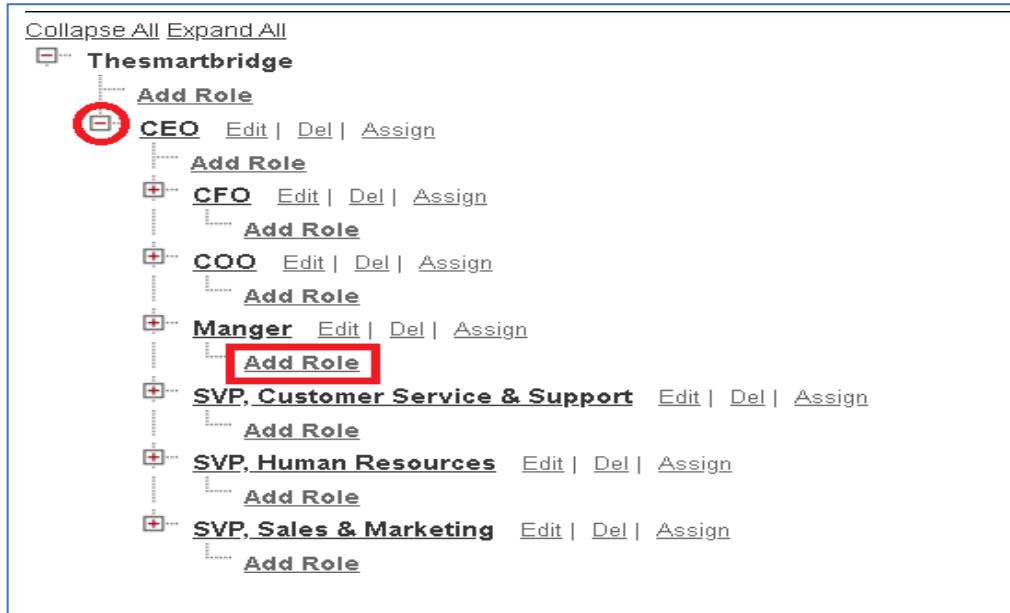
Role Edit	
Label	Manger
Role Name	Manger
This role reports to	CEO
Role Name as displayed on reports	
<input type="button" value="Save"/> <input type="button" value="Save &amp; New"/> <input type="button" value="Cancel"/>	

## 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	geo_9ebb1dfa80b4@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.

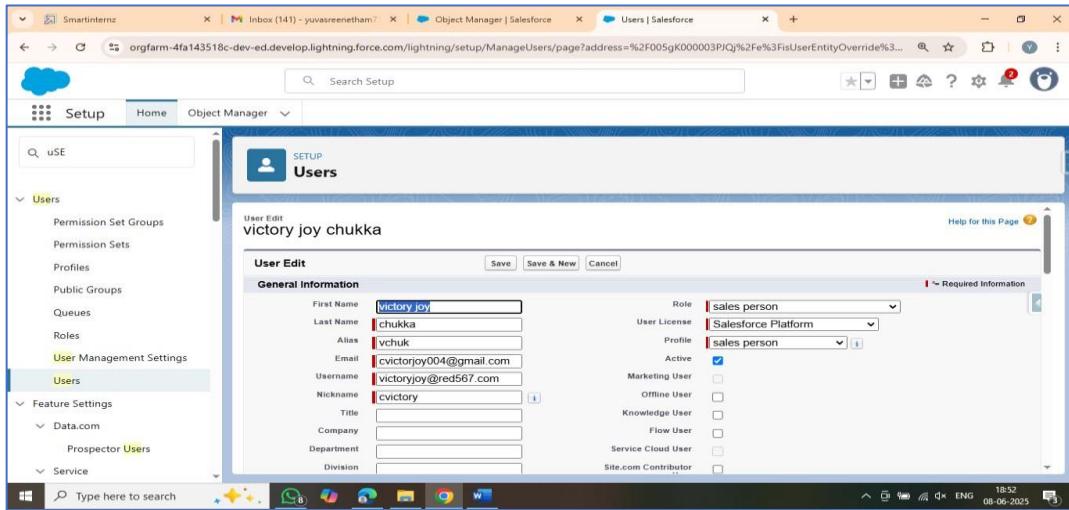
## ACTIVITY – 2 :- creating another users

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

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Export	Chatter	chatty_0dgk00004lujuao_eddit0@ckma@chatter.salesforce.com	✓	✓	Chatter Free User
<input type="checkbox"/>	chukka_victory.joy	vchuk	victoryjoy@gre657.com	sales person	✓	sales person
<input type="checkbox"/>	EPIC_OrgFarm	OEPIC	eoic_9eb33dab9b4@orgfarm.com	✓	✓	System Administrator
<input type="checkbox"/>	karapareddy_uhasree	ukara	kausa@33.com	sales person	✓	sales person
<input type="checkbox"/>	Mikaelson_Niklaus	nmika	niklaus@blue23.com	Manager	✓	Manager
<input type="checkbox"/>	netham_yuva sree	yuu	yuvashreenetham751101@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

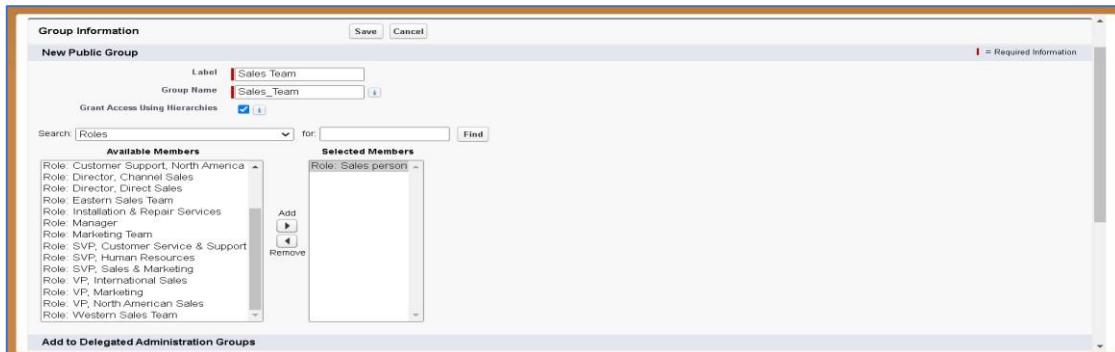
## Milestone - 11 Public Groups

### 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 'Sharing Settings', there is a table where 'Service records' is listed with its 'OWD' dropdown set to 'Private'. A red box highlights this dropdown. Below the table, under 'Other Settings', there are several checkboxes and options. A red box highlights the 'Save' button at the bottom left of the page.

- 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, there is a 'New' button with a red arrow pointing to it. Below the button, it says 'No sharing rules specified.' and 'Service records Sharing Rules Help'.

- 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.

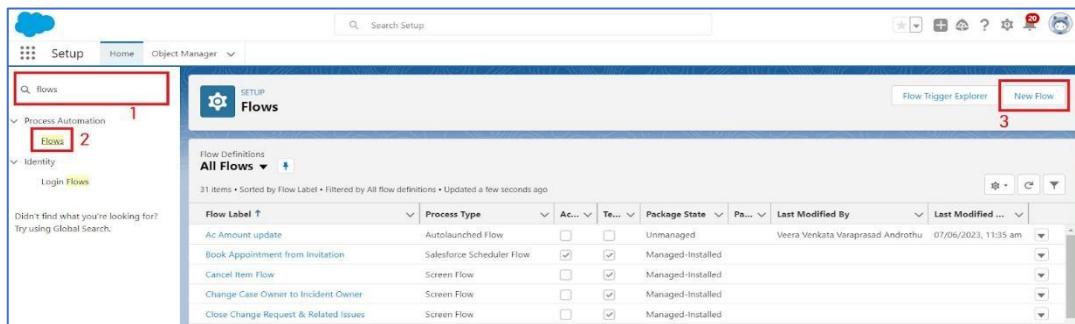
The screenshot shows the 'Sharing Settings' configuration steps. Step 1: Rule Name shows 'sharing settings' in the label field. Step 2: Select your rule type shows 'Based on record owner'. Step 3: Select which records to be shared shows 'Service records' owned by 'Roles' and 'Sales person'. Step 4: Select the users to share with shows 'Share with' set to 'Manager'. Step 6: Select the level of access for the users shows 'Access Level' set to 'ReadWrite'. Red arrows point to each of these five steps.

# GARAGE MANAGEMENT SYSTEM

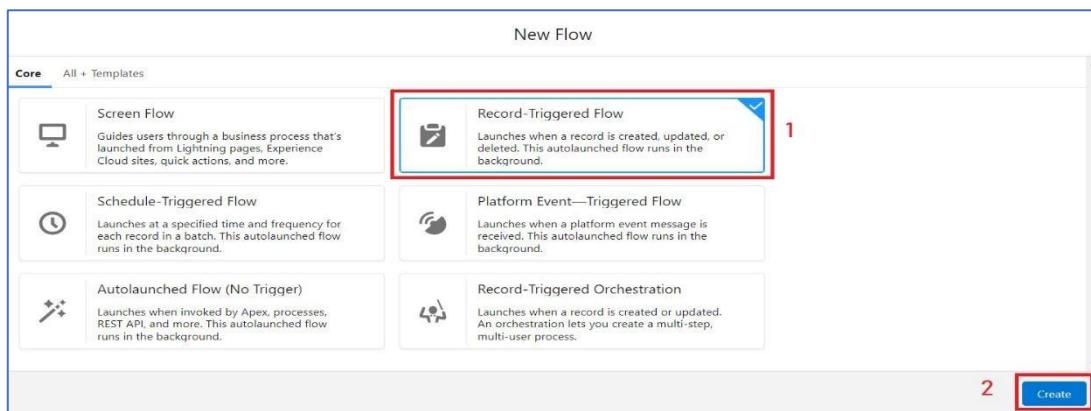
## Milestone – 13 Fields

### ACTIVITY – 1:- Create a Flow

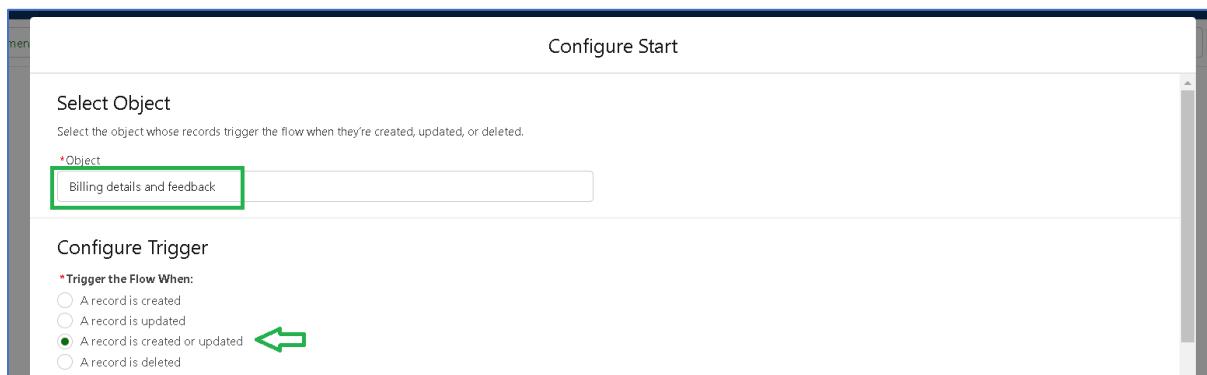
- Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.



- 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.

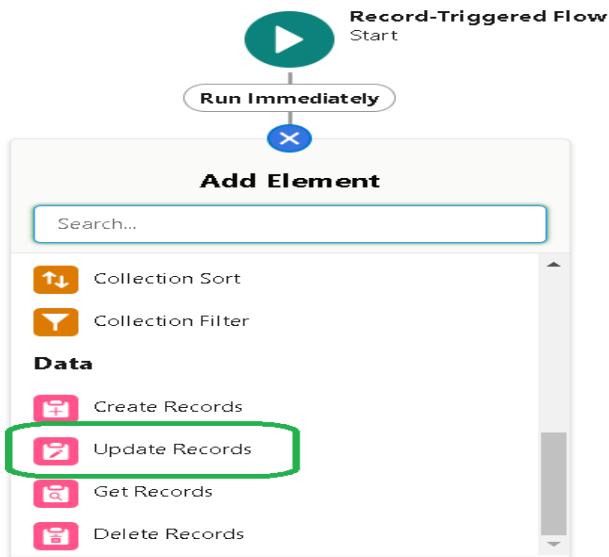
Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

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

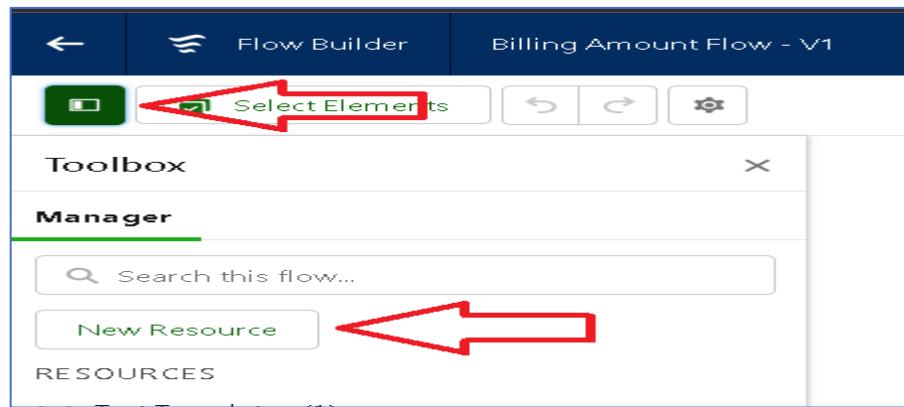
Cancel    Done

**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},

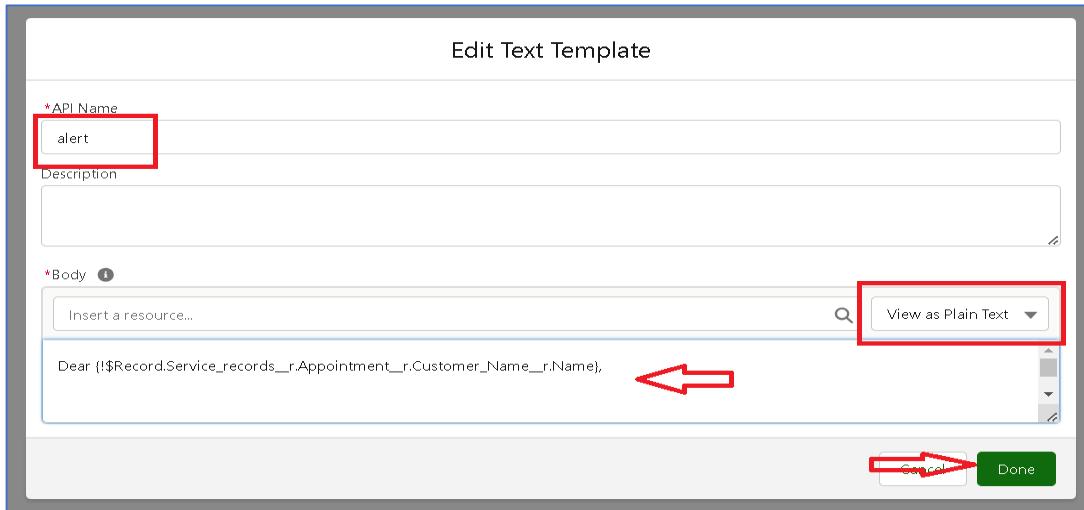
I hope this message finds you well. I wanted to take a moment to express my sincere gratitude for your recent payment for the services provided by our garage management team. Your prompt payment is greatly appreciated, and it helps us continue to provide top-notch services to you and all our valued customers.

Amount paid : {!\$Record.Payment\_Paid\_\_c}

Thank you for Coming .

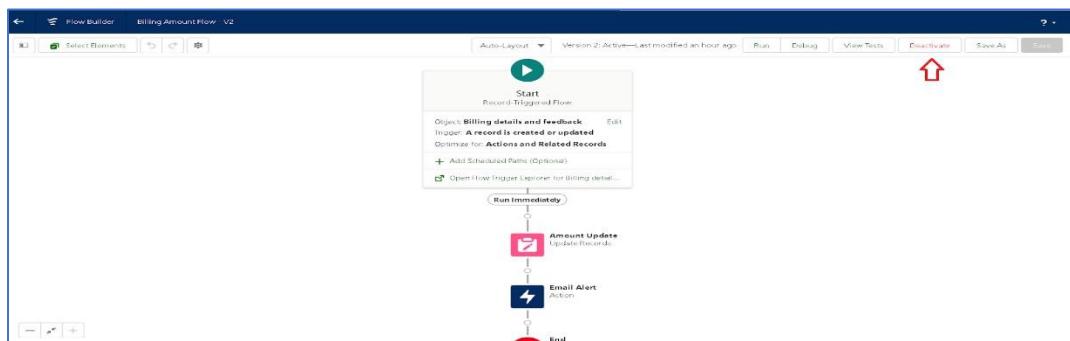
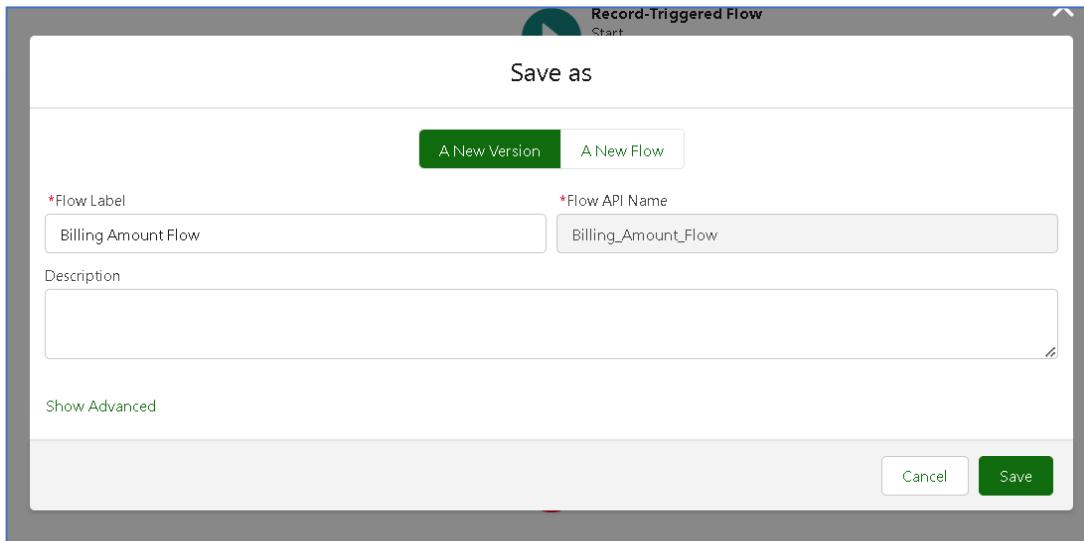
- Click done.

## 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

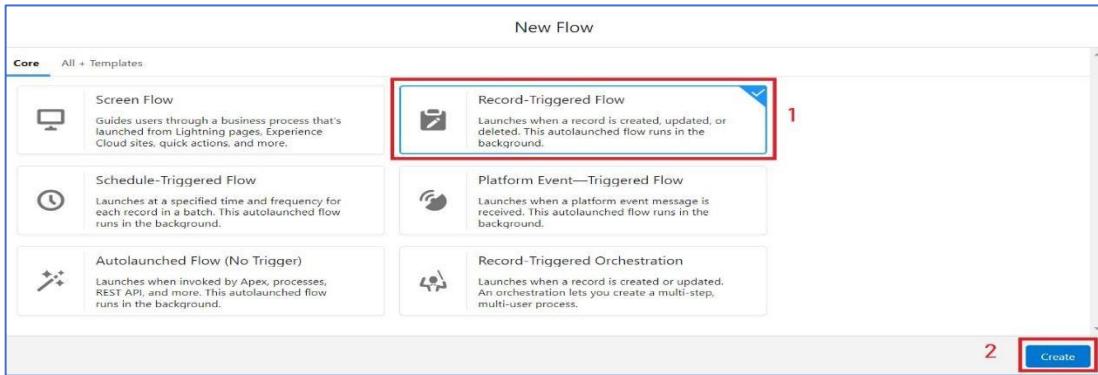


## ACTIVITY – 2 :- Create another Flow

- 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

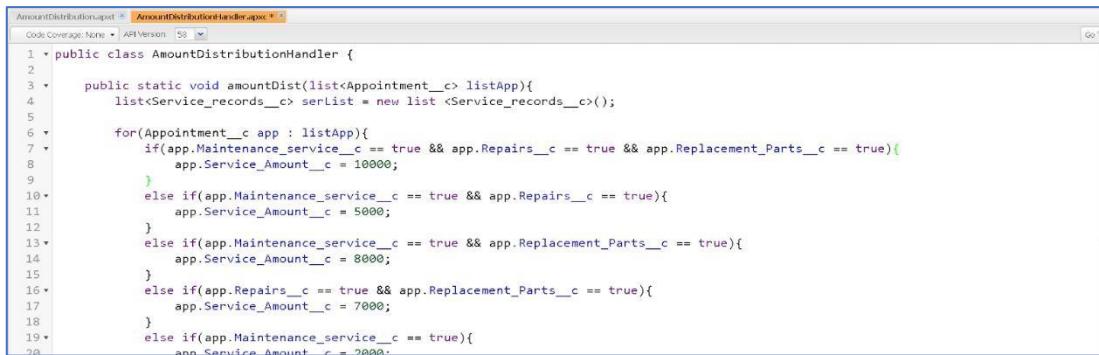
## MILESTONE – 14

### Apex Trigger

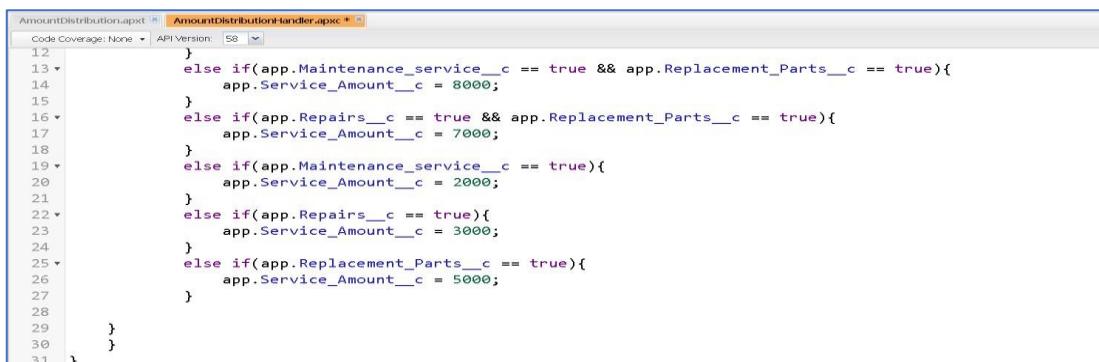
#### ACTIVITY -1 :- Apex handler

**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){
```

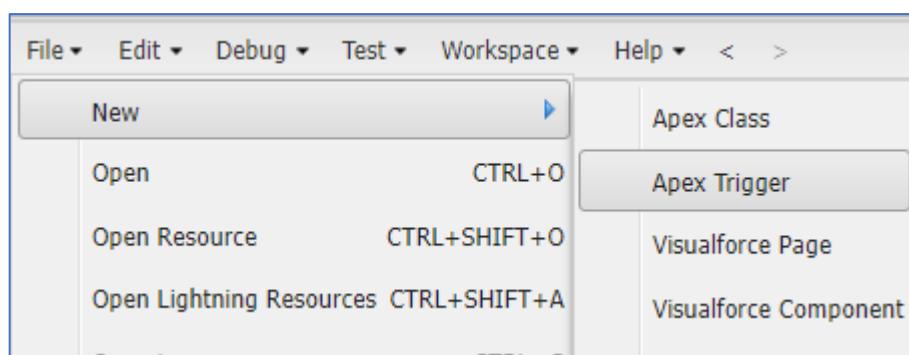
## GARAGE MANAGEMENT SYSTEM

```
    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);

}
```

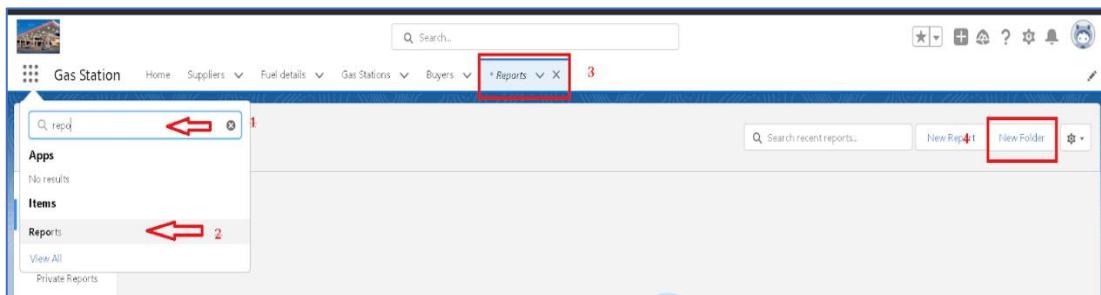
# GARAGE MANAGEMENT SYSTEM

## MILESTONE – 15

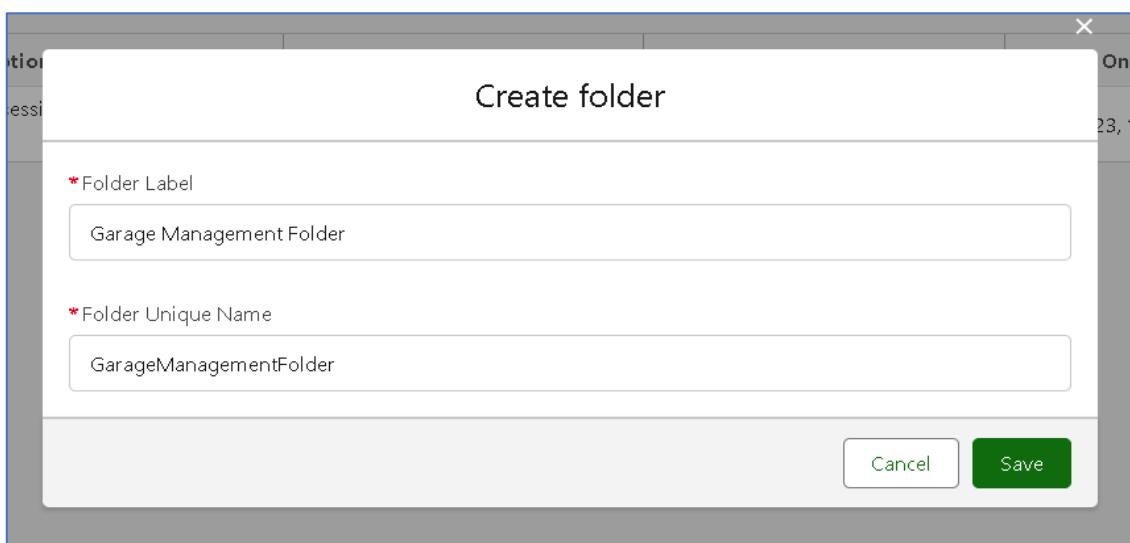
### Reports

#### ACTIVITY – 1:- create a report folder

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



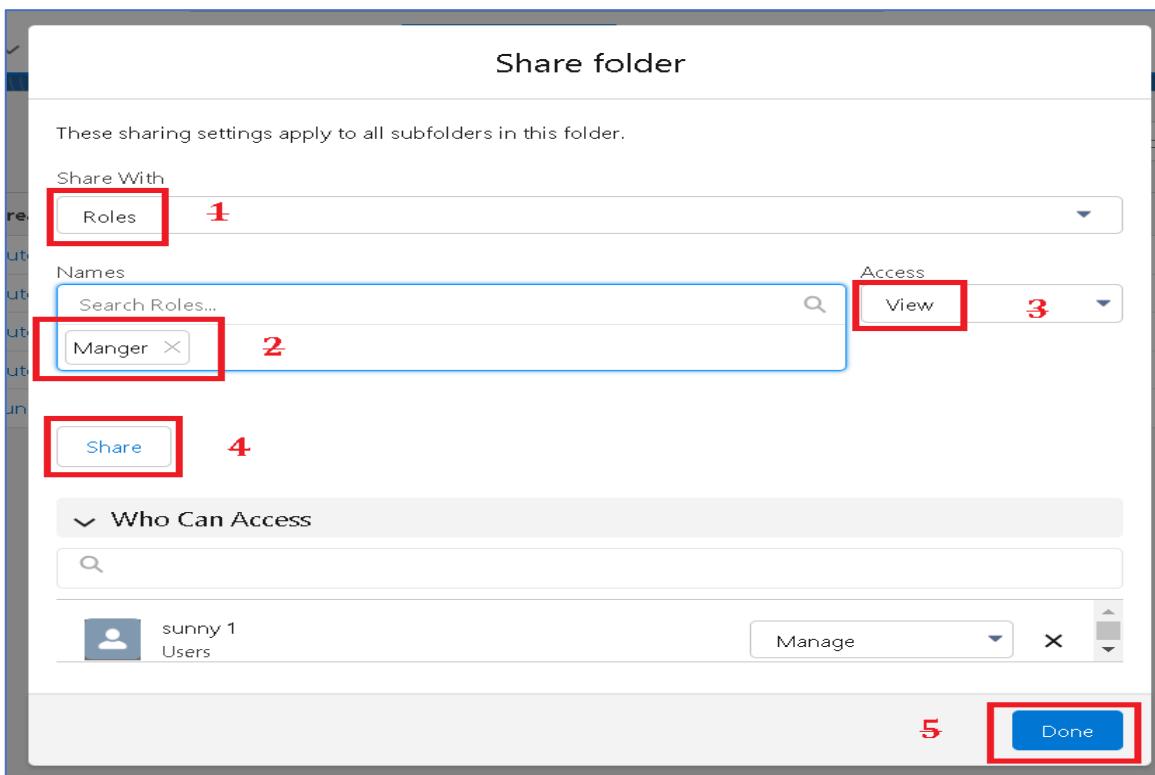
- Give the Folder label as "Garage Management Folder", Folder unique name will be auto populated.
- Click save.



## GARAGE MANAGEMENT SYSTEM

### ACTIVITY – 2: - Sharing a report folder

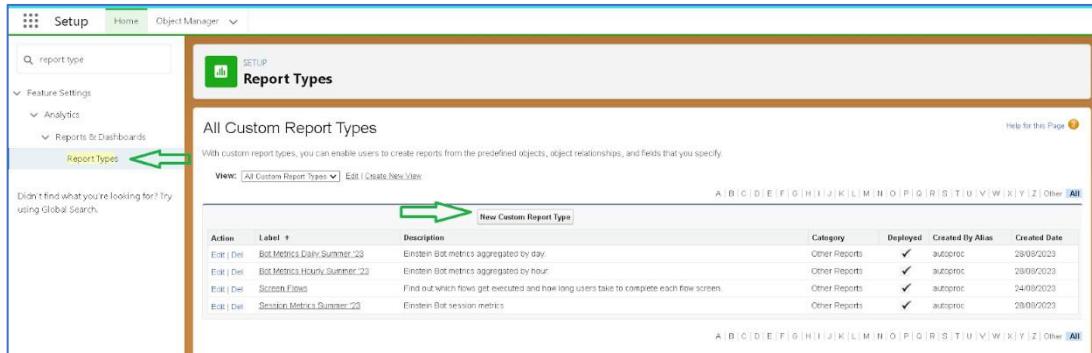
- Go to the app >> click on the reports tab.
- Click on the All folder , click on the Drop down arrow for Garage Management folder, and Click on share.
- Select the share with as “roles”, in name field search for “manager”, give “view” as access for that role.
- Then click share, and click on Done.



# 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.



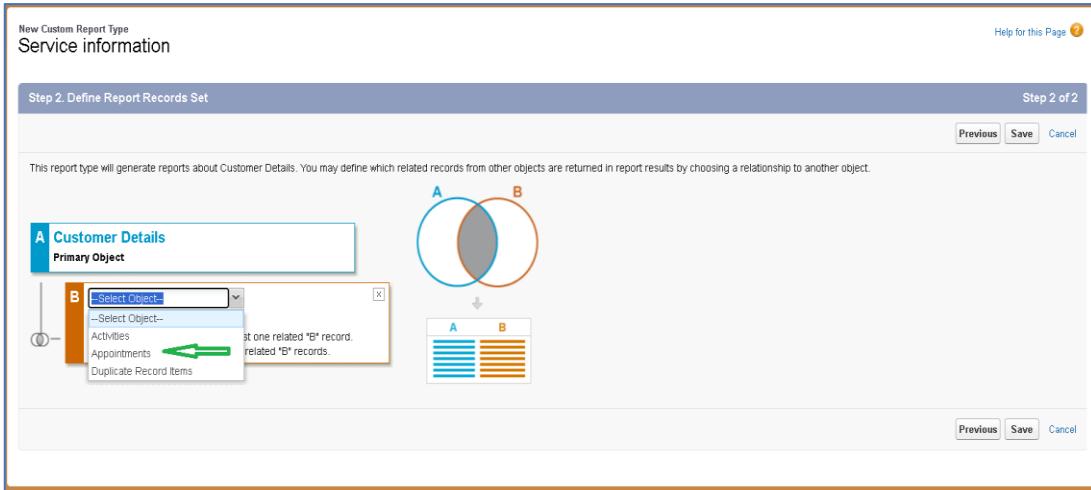
- Select the Primary object as " Customer details" .
- Give the Report type Label as " Service information "
- Report type Name is autopopulated.
- Keep the Description as same.
- Select Store in Category as " other Reports "
- Select the deployment status as " Deployed ", click on Next.

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.

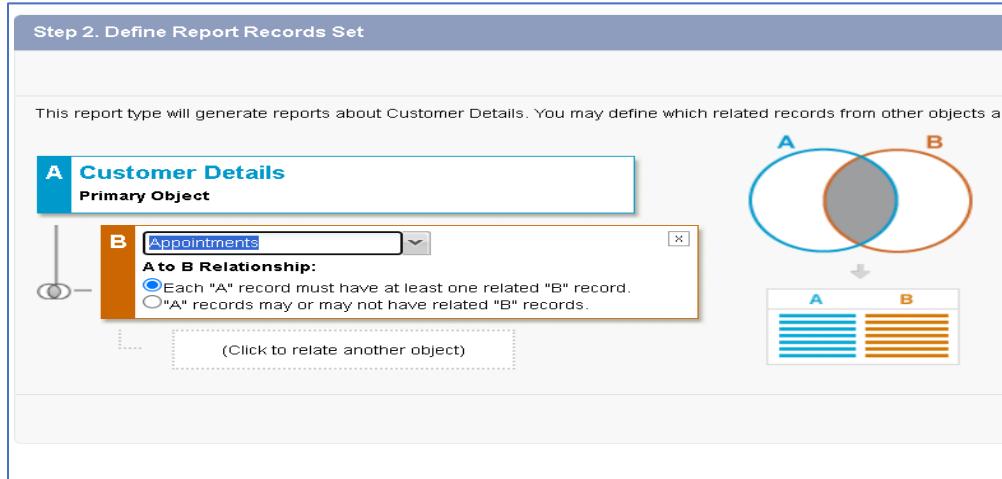
- now , Click on Related object box.

## GARAGE MANAGEMENT SYSTEM

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

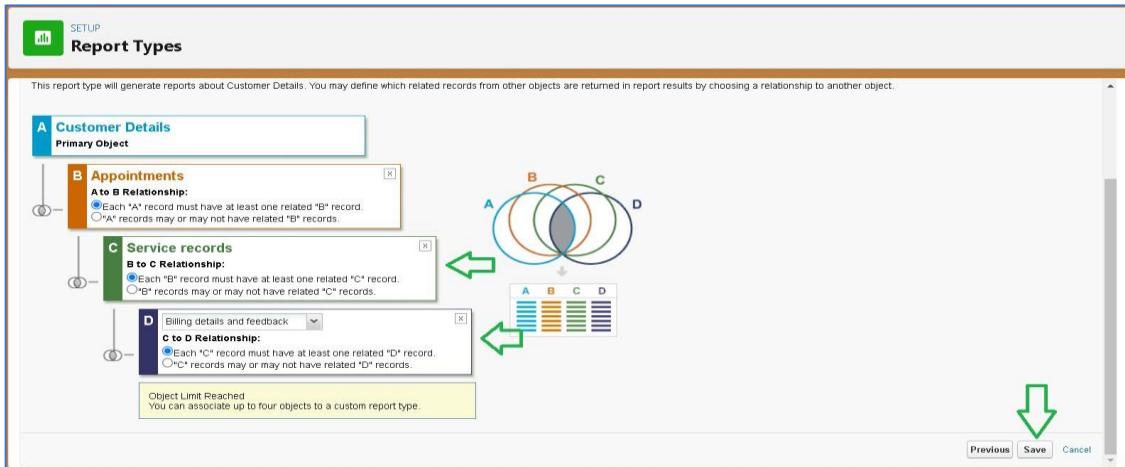


- Again, click to relate another object.



- 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

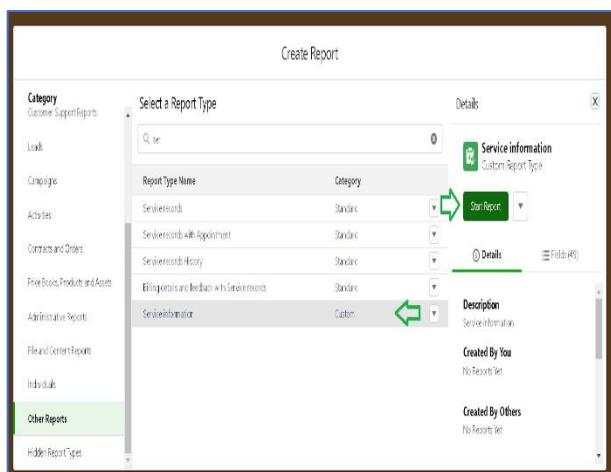


## ACTIVITY – 4 :- Create Report

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

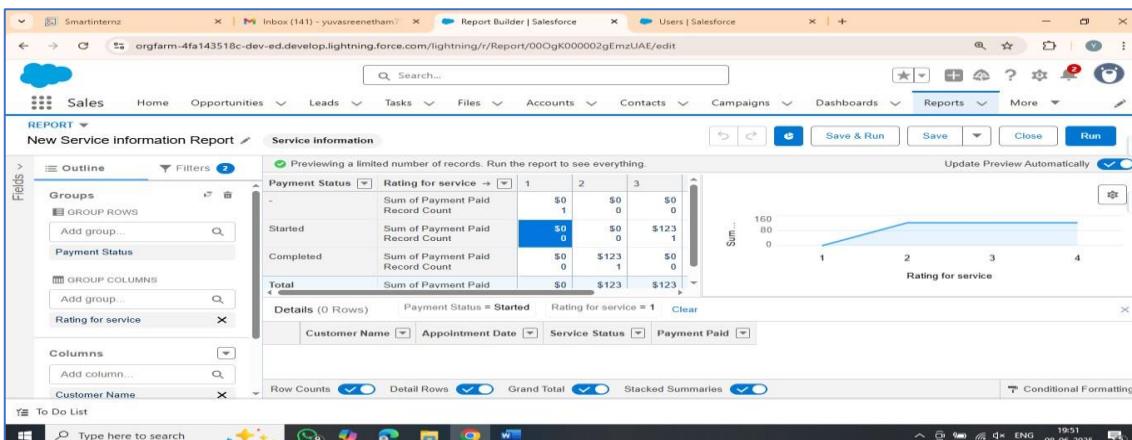
Report Name	Description	Folder	Created By	Created On	Subscribed
Employee's working on projects report	Private Reports	Employee Project	5/6/2023, 9:33 am		
Assets assigned to Employees	Private Reports	Employee Project	5/6/2023, 9:36 am		

- 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

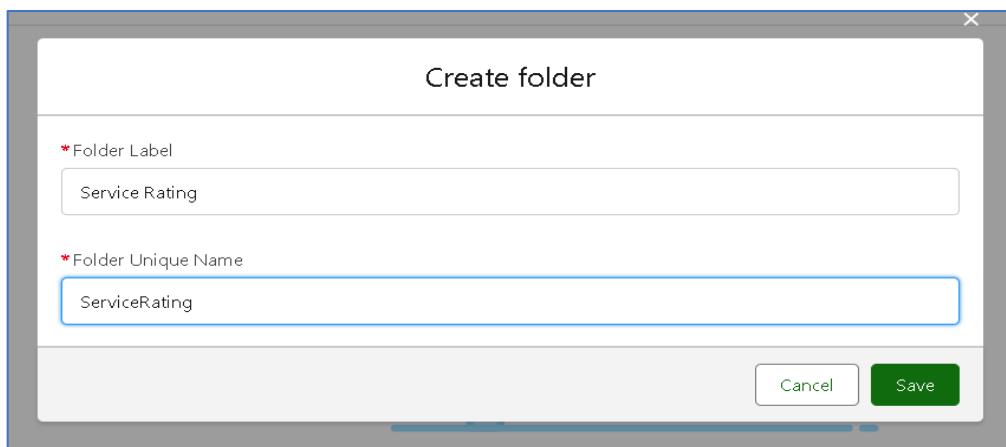
### Dashboards

#### 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 'Recent' section has 2 items. The first item is 'Customer Review', which is described as 'View data on how Enablement helps drive your business outcomes.' The second item is 'Enablement Dashboard', which 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.' At the top right of the list, there are buttons for 'New Dashboard' and 'New Folder'. The bottom of the screen shows the Windows taskbar with various pinned icons and the system tray.

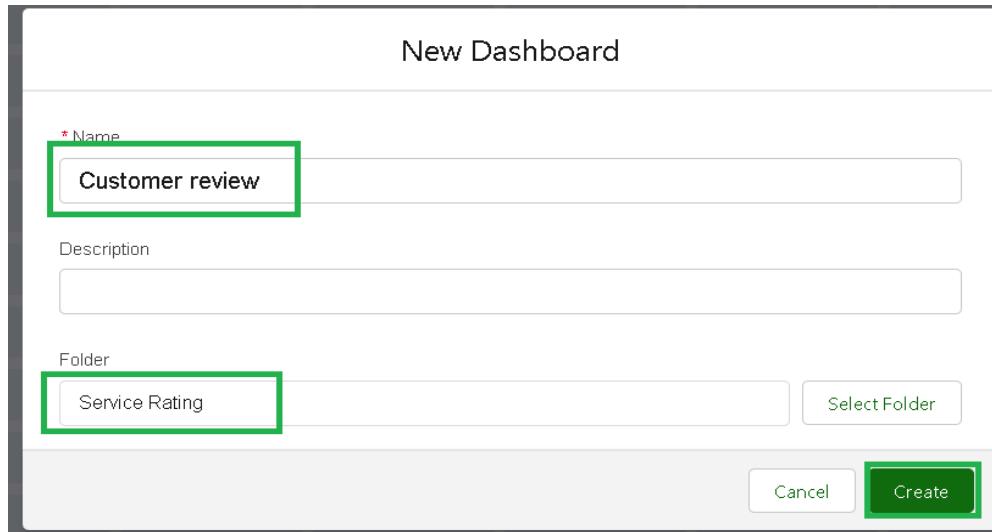
- Click new folder, give the folder label as " Service Rating dashboard".
- Folder unique name will be auto populated.
- Click save.



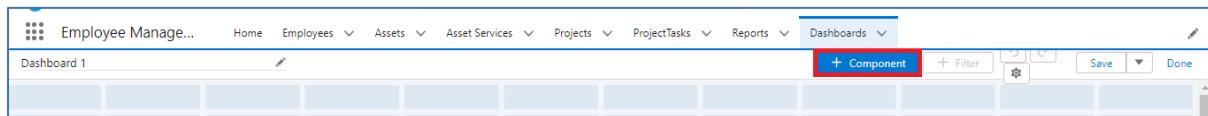
## GARAGE MANAGEMENT SYSTEM

### ACTIVITY – 2: Create Dashboard

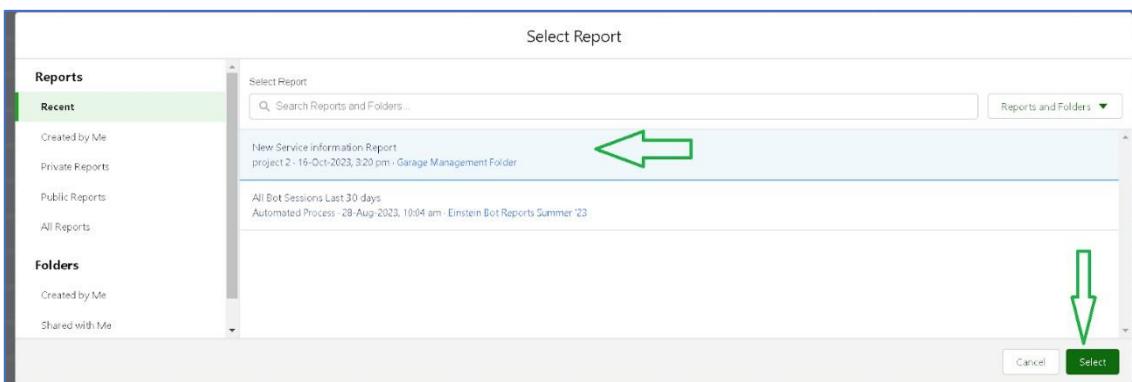
- Go to the app >> click on the Dashboards tabs.
- Give a Name and select the folder that created, and click on create.



- 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.

## GARAGE MANAGEMENT SYSTEM

- Preview is shown below.

The screenshot shows a Salesforce Lightning interface. At the top, there are several tabs: Smartinternz, Inbox (141), Customer Review | Salesforce, and Users | Salesforce. The main title is "Customer Review". Below the title, there is a chart titled "New Service information Report". The chart has two series: "Sum of Payment Paid" (blue line) and "Rating for service" (red line). The "Sum of Payment Paid" series starts at \$0 for rating 1 and rises to approximately \$120 for rating 3. The "Rating for service" series starts at 1 for payment \$0 and rises to approximately 3 for payment \$120. A legend indicates that blue dots represent "Sum of Payment Paid" and red dots represent "Rating for service". Below the chart, there is a link "View Report (New Service information Report)". To the right of the chart is a large, empty grid area. At the bottom of the screen, there is a taskbar with icons for various applications and a search bar.

# 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.

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.

## GARAGE MANAGEMENT SYSTEM

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.

## GARAGE MANAGEMENT SYSTEM

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  
ser-010

Appointment  
[app-016](#) Edit

Quality Check Status ✓ Edit

Service Status  
Completed

service date  
18/11/2024

Created By Annapurna SmartBridge, 18/11/2024, 4:32 pm Last Modified By Annapurna SmartBridge, 18/11/2024, 4:34 pm

# GARAGE MANAGEMENT SYSTEM

## 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 &amp; 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 &amp; New"/> <input type="button" value="Save"/>	
Customer Name: <input type="text"/>	

# GARAGE MANAGEMENT SYSTEM

## 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 &amp; 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 &amp; New"/> <input type="button" value="Save"/>	