

PROJECT NAME : GARAGE MANAGEMENT SYSTEM

TEAM : ANUPAMA DUDI

BALAJI DANDASULA

NOOKESH ANAKAPALLI

The Garage Management System is a valuable tool for automotive repair facilities, helping them deliver top-notch service, increase operational efficiency, and build lasting customer relationships. With its user-friendly interface and powerful features, GMS empowers garages to thrive in a competitive market while ensuring a seamless and satisfying experience for both customers and staff.

Salesforce

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.

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 :

Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

Sign up for your Salesforce Developer Edition
A full-featured copy of the Platform, for free

Complete the form to start your free trial. Our team will be in touch to help you make the most of your trial.

First Name* Last Name*

Email*

Role*

Company*

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

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

Click on sign me up after filling these.

Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.
2. Click on Verify Account
3. Give a password and answer a security question and click on change password.
4. Then you will redirect to your salesforce setup page.

The screenshot shows the Salesforce Setup Home page. At the top, there's a search bar labeled "Search Setup" and various navigation icons. The main content area features a "SETUP Home" section with three cards: "Get Started with Einstein Bots", "Mobile Publisher", and "Real-time Collaborative Docs". On the left sidebar, there are links for "Setup Home", "Service Setup Assistant", "Multi-Factor Authentication Assistant", "Release Updates", "Lightning Experience Transition Assistant", "Salesforce Mobile App", "Lightning Usage", and "Optimizer". Under "ADMINISTRATION", there's a link for "Users".

Create Customer Details Object

To create an object:

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

The screenshot shows the "Customer Details" object creation page in the Salesforce Object Manager. The left sidebar lists various configuration tabs: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled "Edit Custom Object Customer Details" and contains sections for "Custom Object Information" (Label: Customer Details, Plural Label: Customer Details, Starts with vowel sound: unchecked), "Object Name" (Object Name: Customer_Details, Example: Account), "Description" (empty text area), "Context-Sensitive Help Setting" (radio button selected: Open the standard Salesforce.com Help & Training window), and "Content Name" (dropdown: -None-). At the bottom, there's a "Enter Record Name Label and Format" section.

The screenshot shows the Salesforce Setup interface for the 'Customer Details' object. The top navigation bar includes tabs for 'Smartinternz', 'Garage Management System', and 'Customer Details | Salesforce'. The main page title is 'Customer Details' under 'SETUP > OBJECT MANAGER'. On the left, a sidebar titled 'Details' lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area shows the 'Customer Details' object configuration. It includes sections for 'Optional Features' (Allow Reports, Allow Activities, Track Field History, Allow in Chatter Groups, Enable Licensing), 'Object Classification' (Allow Sharing, Allow Bulk API Access, Allow Streaming API Access), 'Deployment Status' (In Development, Deployed), and 'Search Status' (Allow Search). At the bottom are 'Save', 'Save & New', and 'Cancel' buttons. The status bar at the bottom of the screen displays weather information (92°F, Sunny), system icons, and the date/time (28-04-2024).

Create Appointment Object

To create an object:

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

The screenshot shows the Salesforce Setup interface for creating a custom object named 'Appointment'. The left sidebar lists various setup categories like Fields & Relationships, Page Layouts, and Record Types. The main content area displays the 'Custom Object Definition Edit' screen for 'Appointment'. It includes fields for Label (Appointment), Plural Label (Appointments), and Description. A note about changing the label is present, along with context-sensitive help settings. The status bar at the bottom shows it's 92°F and sunny.

This screenshot continues from the previous one, showing the 'Optional Features' and 'Deployment Status' sections of the custom object definition. Under 'Optional Features', 'Allow Reports' and 'Track Field History' are checked. Under 'Deployment Status', 'Deployed' is selected. The status bar at the bottom indicates it's 92°F and sunny.

Create Service Records Object

To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
2. Enter the label name >> Service records
3. Plural label name >> Service records
4. Enter Record Name Label and Format
 - Record Name >>Service records Name
 - Data Type >> Auto Number

- Display Format >> ser-{000}
 - Starting number >> 1
 5. Click on Allow reports and Track Field History,
 6. Allow search >> Save.

The screenshot shows the Salesforce Setup interface with the following details:

- Header:** Smartinternz, Garage Management System - X, Service records | Salesforce
- Page:** Setup > OBJECT MANAGER > Service records
- Left Sidebar (Details):** Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules.
- Main Content:** Edit Custom Object Service records.
 - Custom Object Definition Edit:** Save, Save & New, Cancel.
 - Custom Object Information:** Label: Service records (Example: Account), Plural Label: Service records (Example: Accounts), Starts with vowel sound:
 - Object Name:** Object Name: Service_records (Example: Account).
 - Description:** A large text input field.
 - Context-Sensitive Help Setting:** Open the standard Salesforce.com Help & Training window (radio button selected), Open a window using a Visualforce page.
 - Content Name:** None.
- Bottom Navigation:** Search, Home, Object Manager, Setup, Help for this Page.
- Bottom Status Bar:** 92°F Sunny, ENG IN, 10:42 28-04-2024, various system icons.

The screenshot shows the Salesforce Setup interface for managing object settings. The top navigation bar includes tabs for Smartinternz, Garage Management System, Service records | Salesforce, and a URL for creative-impala-8qr0t3-dev-ed.trailblaze.lightning.force.com. The main header features a blue cloud icon, a search bar with placeholder "Search Setup", and various global buttons like Home, Object Manager, and a gear icon.

The left sidebar lists several configuration categories: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules.

The right pane displays the "Service records" object settings. It includes sections for "Optional Features" (Allow Reports, Allow Activities, Track Field History, Allow in Chatter Groups, Enable Licensing), "Object Classification" (Allow Sharing, Allow Bulk API Access, Allow Streaming API Access), "Deployment Status" (In Development, Deployed), and "Search Status" (Allow Search). A "Display Format" field is set to "ser-{000}" with an example "A-{0000} What Is This?". At the bottom are "Save", "Save & New", and "Cancel" buttons.

Create Billing Details And Feedback Object

To create an object:

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

2. Enter the label name >> Billing details and feedback
3. Plural label name >> Billing details and feedback
4. Enter Record Name Label and Format
 - Record Name >> Billing details and feedback Name
 - Data Type >> Auto Number
 - Display Format >> bill-{000}
 - Starting number >> 1
5. Click on Allow reports and Track Field History,
6. Allow search >> Save.

Billing details and feedback

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label: Billing details and feedback **Example:** Account

Plural Label: Billing details and feedback **Example:** Accounts

Starts with vowel sound:

Object Name: Billing_details_and_feedback **Example:** Account

Description:

Context-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window Open a window using a Visualforce page

Content Name:

Enter Record Name Label and Format

Display Format: bill-{000} **Example:** A-{0000} [What Is This?](#)

Optional Features

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Enable Licensing [i](#)

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

Deployment Status

[What Is This?](#)

- In Development
- Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

- Allow Search

Buttons: Save, Save & New, Cancel

Billing details and feedback

Custom Object Definition Edit

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports. Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label: Billing details and feedback **Example:** Account

Plural Label: Billing details and feedback **Example:** Accounts

Starts with vowel sound:

Object Name: Billing_details_and_feedback **Example:** Account

Description:

Context-Sensitive Help Setting: Open the standard Salesforce.com Help & Training window Open a window using a Visualforce page

Content Name:

Enter Record Name Label and Format

Display Format: bill-{000} **Example:** A-{0000} [What Is This?](#)

Optional Features

- Allow Reports
- Allow Activities
- Track Field History
- Allow in Chatter Groups
- Enable Licensing [i](#)

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Light Application object. [Learn more.](#)

- Allow Sharing
- Allow Bulk API Access
- Allow Streaming API Access

Deployment Status

[What Is This?](#)

- In Development
- Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

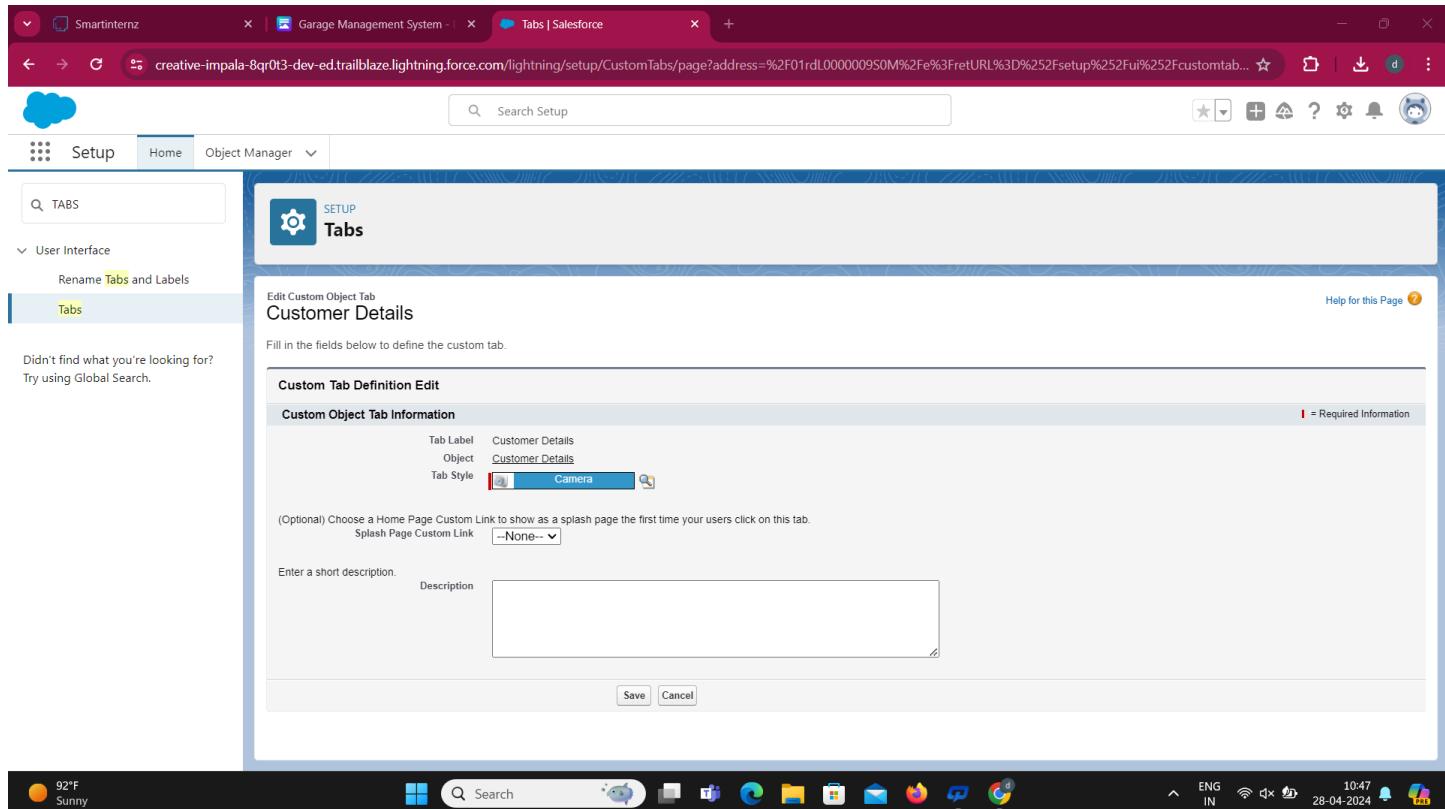
- Allow Search

Buttons: Save, Save & New, Cancel

Creating A Custom Tab

To create a Tab:(Customer Details)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. Select Object(Customer Details) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .
3. Make sure that the Append tab to users' existing personal customizations is checked.
4. Click save.



Creating Remaining Tabs

1. Now create the Tabs for the remaining Objects, they are “ Appointments, Service records,Billing details and feedback”.
2. Follow the same steps as mentioned above

Create A Lightning App

To create a lightning app page:

1. Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App.
2. Fill the app name in app details as Garage Management Application >> Next >> (App option page) keep it as default >> Next >> (Utility Items) keep it as default >> Next.
3. To Add Navigation Items:
4. Select the items (Customer Details,Appointments, Service records, Billing details and feedback, Reports and Dashboards) from the search bar and move it using the arrow button >> Next.

To Add User Profiles:

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

Creation Of Fields For The Customer Details Object

1. To create fields in an object:

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

Note: Follow the above steps for the remaining field for the same object.

2. To create another fields in an object:

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

Creation of Lookup Field on Appointment Object :

1. Go to setup >> click on Object Manager >> type object name(Appointment) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select “Look-up relationship” as data type and click Next.
4. Select the related object “ Customer Details” and click next.
5. Next >> Next >> Save.

Note: Make sure you complete Activity 4 Before continuing.

Creation of Lookup Field on Service records Object :

1. Go to setup >> click on Object Manager >> type object name(Service records) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select “Look-up relationship” as data type and click Next.
4. Select the related object “ Appointment ” and click next.
5. Make it a required field so click on Required.
6. Scroll down for Lookup Filter and click on Show filter settings.
7. Now add the filter criteria.
8. Field : Appointment: Appointment Date >> Operator : less than >> select field >> Appointment: Created Date
9. Filter type should be Required.

Lookup Filter

Optional, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

Field	Operator	Value / Field
Appointment: Appointment Date	less than	Field <input type="button" value="Appointment: Created Date"/> Clear
AND	Begin typing to search for a field...	--None-- Value <input type="button" value="Value"/> Clear

Filter Type **Required.** The user-entered value must match filter criteria.
If it doesn't, display this error message on save:
Value does not exist or does not match filter criteria.
 

Optional. The user can remove the filter or enter values that don't match criteria.

Lookup Window Text Add this informational message to the lookup window.

Active Enable this filter. 

1. Error Message : Value does not match the criteria.
2. Enable the filter by click on Active.
3. Next >> Next >> Save.

Creation of Lookup Field on Billing details and feedback Object :

1. Go to setup ? click on Object Manager ? type object name(Billing details and feedback) in search bar ? click on the object.
2. Now click on “Fields & Relationships” ? New
3. Select “Look-up relationship” as data type and click Next.
4. Select the related object “ Service records” and click next.
5. Next ? Next ? Save&new.

Creation of Lookup Field on Appointment Object :

1. Go to setup >> click on Object Manager >> type object name(Appointment) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select “Look-up relationship” as data type and click Next.
4. Select the related object “ Customer Details” and click next.
5. Next >> Next >> Save.

Note: Make sure you complete Activity 4 Before continuing.

Creation of Lookup Field on Service records Object :

1. Go to setup >> click on Object Manager >> type object name(Service records) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select “Look-up relationship” as data type and click Next.
4. Select the related object “ Appointment ” and click next.
5. Make it a required field so click on Required.

Lookup Options

Related To	Appointment	Child Relationship Name	Service_records
Related List Label	Service records		
Required	<input checked="" type="checkbox"/> Always require a value in this field in order to save a record		
What to do if the lookup record is deleted?	<input type="radio"/> Clear the value of this field. You can't choose this option if you make this field required. <input checked="" type="radio"/> Don't allow deletion of the lookup record that's part of a lookup relationship.		

1. Scroll down for Lookup Filter and click on Show filter settings.
2. Now add the filter criteria.
3. Field : Appointment: Appointment Date >> Operator : less than >> select field >> Appointment: Created Date
4. Filter type should be Required.

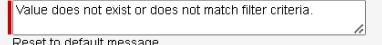
Lookup Filter

Optional, create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

[Hide Filter Settings](#)

Field	Operator	Value / Field
Appointment: Appointment Date	less than	Field: Appointment: Created Date
Value	--None--	Value

[Add Filter Logic...](#)

Filter Type **Required.** The user-entered value must match filter criteria.
 If it doesn't, display this error message on save:
 Value does not exist or does not match filter criteria. 

Optional. The user can remove the filter or enter values that don't match criteria.

Lookup Window Text Add this informational message to the lookup window.

Active Enable this filter. 

[Change Field Type](#) [Save](#) [Cancel](#)

1. Error Message : Value does not match the criteria.
2. Enable the filter by click on Active.
3. Next >> Next >> Save.

Creation of Lookup Field on Billing details and feedback Object :

1. Go to setup ? click on Object Manager ? type object name(Billing details and feedback) in search bar ? click on the object.
2. Now click on “Fields & Relationships” ? New
3. Select “Look-up relationship” as data type and click Next.
4. Select the related object “ Service records” and click next.
5. Next ? Next ? Save&new.

Creation Of Checkbox Fields

Creation of Checkbox Field on Appointment Object :

1. Go to setup >> click on Object Manager >> type object name(Appointment) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select “Check box” as data type and click Next.
4. Give the Field Label : Maintenance service
5. Field Name : is auto populated
6. Default value : unchecked
7. Click on next >> next >> save.

Creation of Another Checkbox Field on Appointment Object :

1. Repeat the steps form 1 to 3.
2. Give the Field Label : Repairs
3. Field Nme : is auto populated
4. Default value : unchecked
5. Click on next >> next >> save.
6. Follow the same and create another checkbox with given names
7. Give the Field Label : Replacement Parts
8. Field Nme : is auto populated

9. Default value : unchecked
10. Click on next >> next >> save.

Creation of Checkbox Field on Service records Object :

1. Go to setup >> click on Object Manager >> type object name(Service records) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select “Check box” as data type and click Next.
4. Give the Field Label : Quality Check Status
5. Field Nme : is auto populated
6. Default value : unchecked
7. Click on next >> next >> save

Creation Of Date Fields

Creation of Date Field on Appointment Object :

1. Go to setup >> click on Object Manager >> type object name(Appointment) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select “Date” as data type and click Next.
4. Give the Field Label : Appointment Date
5. Field Nme : is auto populated
6. Make it as a Required field by click on the Required option.
7. Click on next >> next >> save.

Creation Of Currency Fields

Creation of Currency Field on Appointment Object :

1. Go to setup >> click on Object Manager >> type object name(Appointment) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select “Currency” as data type and click Next.
4. Give the Field Label : Service Amount
5. Field Nme : is auto populated
6. Click on next
7. Give read only for all the profiles in field level security for profile.
8. Click on next >> save.

Creation of Currency Field on Billing details and feedback Object :

1. Follow the same steps as mentioned above in Billing details and feedback Object.
2. Change the label name as mentioned.
3. Give the Field Label : Payment Paid
4. Field Nme : is auto populated

Creation Of Text Fields

1. Go to setup >> click on Object Manager >> type object name(Appointment) in the search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.

3. Select “Text” as data type and click Next.
4. Give the Field Label : Vehicle number plate
5. Field Name : is auto populated
6. Length : 10
7. Make field as Required and Unique.

Step 2. Enter the details Step 2 of 4

Field Label [i](#)

Please enter the maximum length for a text field below.
Length

Field Name [i](#)

Description

Help Text

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

Unique Do not allow duplicate values

- Treat “ABC*” and “abc” as duplicate values (case insensitive)
- Treat “ABC*” and “abc” as different values (case sensitive)

External ID Set this field as the unique record identifier from an external system

Auto add to custom report type Add this field to existing custom report types that contain this entity [i](#)

Click on next >> next >> save.

Creation of Text Fields in Billing details and feedback object :

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

Creation Of Picklist Fields

Creation of Picklist Fields in Service records object :

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

New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label

Values Use global picklist value set
 Enter values, with each value separated by a new line

Started
 Completed

Display values alphabetically, not in the order entered
 Use first value as default value
 Restrict picklist to the values defined in the value set

Field Name

Description

Previous Next Cancel

Click Next.Next >> Next >> Save.

Creation of Picklist Fields in Billing details and feedback object :

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

Creating Formula Field In Service Records Object

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

Step 2. Choose output type Step 2 of 5

Field Label

Field Name

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

Formula Return Type

Select one of the data types below.

None Selected

Checkbox Calculate a boolean value
Example: `TODAY() > CloseDate`

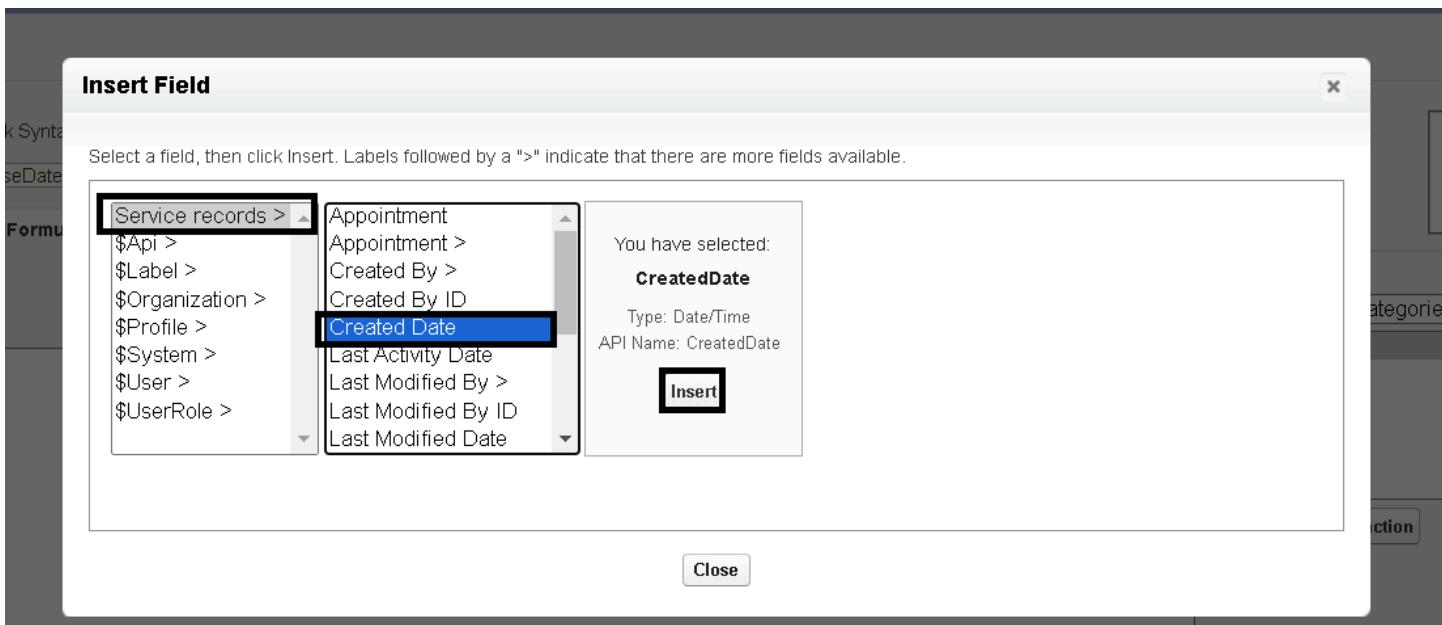
Currency Calculate a dollar or other currency amount and automatically format the field as a currency amount.
Example: `Gross Margin = Amount - Cost__c`

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

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

Previous Next Cancel

Insert field formula should be : CreatedDate



Step 3. Enter formula Step 3 of 5

Enter your formula and click Check Syntax to check for errors. Click the Advanced Formula subtab to use additional fields, operators, and functions.

Example: Reminder Date = CloseDate - 7 More Examples...

Simple Formula Advanced Formula

Insert Field Insert Operator Functions

service dates (Date) = **CreatedDate**

Functions -- All Function Categories -- ABS ACOS ADDMONTHS AND ASCII

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is true

Error Message Please enter valid number

Error Location Top of Page Field Vehicle number plate

Save Save & New Cancel

click "Check Syntax". Click next >> next >> Save.

To Create A Validation Rule To An Appointment Object

1. Go to the setup page >> click on object manager >> From drop down click edit for Appointment object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as " Vehicle ".
4. Insert the Error Condition Formula as : - NOT(REGEX(Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))

Validation Rule Edit

Save Save & New Cancel

Rule Name Active

Description vehicle

Error Condition Formula

Example: More Examples...
Display an error if Discount is more than 30%
If this formula expression is true, display the text defined in the Error Message area

Insert Field Insert Operator NOT (REGEX(Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))

Functions -- All Function Categories -- ABS ACOS ADDMONTHS AND ASCII ASIN

Insert Selected Function ABS(number)
Returns the absolute value of a number, a number without its sign
[Help on this function](#)

Check Syntax

Enter the Error Message as “Please enter valid number”, select the Error location as Field and select the field as “Vehicle number plate”, and click Save.

Error Message

Example: Discount percent cannot exceed 30%
This message will appear when Error Condition formula is true

Error Message

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

Error Location Top of Page Field  

Save Save & New Cancel

To Create A Validation Rule To An Service Records Object

1. Go to the setup page >> click on object manager >> From drop down click edit for Service records object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as “ service_status_note ”.
4. Insert the Error Condition Formula as : - NOT(ISPICKVAL(Service_Status__c , "Completed"))
5. Enter the Error Message as “still it is pending”, select the Error location as Field and select the field as “Service status”, and click Save.

To Create A Validation Rule To An Billing Details And Feedback Object

1. Go to the setup page >> click on object manager >> From drop down click edit for Billing details and feedback object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as “ rating_should_be_less_than_5 ”.
4. Insert the Error Condition Formula as : - NOT(REGEX(Rating_for_service__c , "[1-5]{1}"))
5. Enter the Error Message as “rating should be from 1 to 5”, select the Error location as Field and select the field as “Rating for Service”, and click Save

To Create A Matching Rule To An Customer Details Object

1. Go to quick find box in setup and search for matching Rule.
2. Click on matching rule >> click on New Rule.
3. Select the object as Customer details and click Next.
4. Give the Rule name : Matching customer details
5. Unique name : is auto populated
6. Define the matching criteria as
7. Field Matching Method 1. Gmail Exact 2. Phone Number Exact
8. Click save.
9. After Saving Click on Activate.

Rule Details

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

Matching Criteria

Tell the rule which fields to compare and how.

Field	Matching Method	Match Blank Fields
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... Add

Save Cancel

Matching Rule
matching Customer details Help for this Page ?

Matching Rule Detail

Object	Customer Details	Action Buttons
Rule Name	matching Customer details	Edit Delete Clone Activate
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

To Create A Duplicate Rule To An Customer Details Object

1. Go to quick find box in setup and search for Duplicate rules.
2. Click on Duplicate rule >> click on New Rule >> select customer details object.
3. Give the Rule name as : Customer Detail duplicate
4. Scroll a little in Matching rule section
5. Select the matching rule : Matching customer details
6. And Click on save.
7. After saving the Duplicate Rule, Click on Activate.

Manager Profile

To create a new profile:

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (Manager) >> Save.
2. While still on the profile page, then click Edit.
3. 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 type="radio"/>
Digital Experiences (standard_SalesforceCMS)	<input checked="" type="checkbox"/>	<input type="radio"/>		Service Console (standard_LightningService)	<input checked="" type="checkbox"/>	<input type="radio"/>
Garage Management Application (Garage_Management_Application)	<input checked="" type="checkbox"/>	<input type="radio"/>		Site.com (standard_Sites)	<input checked="" type="checkbox"/>	<input type="radio"/>
Laptop Hub (Laptop_Hub)	<input type="checkbox"/>	<input type="radio"/>		Subscription Management (standard_RevenueCloudConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
				WPS Office (standard_WPSOffice)	<input type="checkbox"/>	<input type="radio"/>

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

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

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

Sales Person Profile

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Salesforce Platform User) >> enter profile name (sales person) >> Save.
2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the GArage management.
4. Scroll down to Custom Object Permissions and Give access permissions for Appointments,Billing details and feedback , service records and customer details objects as mentioned in the below diagram.

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

And click save.

Creating Manager Role

Creating Manager Role:

1. Go to quick find >> Search for Roles >> click on set up roles.
2. Click on Expand All and click on add role under whom this role works.
3. Give Label as “Manager” and Role name gets auto populated. Then click on Save.

Role Edit

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

Creating Another Roles

Creating another two roles under manager

1. Go to quick find >> Search for Roles >> click on set up roles.
2. Click plus on CEO role, and click add role under manager.
3. Give Label as “sales person” and Role name gets auto populated. Then click on Save.

Create User

1. Go to setup >> type users in quick find box >> select users >> click New user.
2. Fill in the fields
3. First Name : Niklaus
4. Last Name : Mikaelson
5. Alias : Give a Alias Name
6. Email id : Give your Personal Email id
7. Username : Username should be in this form: text@text.text
8. Nick Name : Give a Nickname
9. Role : Manager
10. User licence : Salesforce
11. Profiles : Manager
12. Save.

The screenshot shows the Salesforce Setup interface. On the left, a sidebar navigation bar includes links for Home, Object Manager, and various setup categories like Permission Set Groups, Profiles, Public Groups, Queues, Roles, User Management Settings, and Users. The 'Users' link is currently selected. The main content area displays the 'User Edit' screen for a user named 'Niklaus Mikaelson'. The 'General Information' section contains fields for First Name (Niklaus), Last Name (Mikaelson), Alias (nmika), Email (ndprased0143@gmail.com), Username (anubaby@anu.in), Nickname (anubaby), Title (empty), Company (empty), Department (empty), and Division (empty). To the right of these fields are dropdown menus for Role (Manager), User License (Salesforce), Profile (Manager), and Active status (checked). Below these are several checkboxes for Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, and Data.com User Type (set to 'None'). At the bottom, there are fields for Data.com Monthly Addition Limit (300) and Accessibility Mode (Classic Only).

Creating Another Users

1. Repeat the steps and create another user using
 1. Role : sales person
 2. User licence : Salesforce Platform
 3. Profile : sales person

Note : create atleast 3 users with these permissions.

This screenshot is identical to the previous one, showing the 'User Edit' screen for a new user named 'Anupama Dudi'. The 'General Information' section has been populated with different values: First Name (Anupama), Last Name (Dudi), Alias (ADudi), Email (ndprasad0143@gmail.com), Username (ndprasad0143@creative-im), Nickname (ndprasad0143), Title (empty), Company (Smart bridge), Department (empty), and Division (empty). The 'Role' dropdown is set to '<None Specified>'. The 'Profile' dropdown is set to 'System Administrator'. The 'Active' checkbox is checked. Other checkboxes for Marketing User, Offline User, Knowledge User, Flow User, Service Cloud User, Site.com Contributor User, Site.com Publisher User, WDC User, and Data.com User Type (set to '--None--') are all unchecked. The bottom section shows the Data.com Monthly Addition Limit is set to 300 and the Accessibility Mode is set to 'Classic Only'.

User Edit
balaji dandasula

User Edit

General Information

First Name: balaji
Last Name: dandasula
Alias: bdand
Email: ndprasad0143@gmail.com
Username: balaji@d.in
Nickname: balaji
Title:
Company:
Department:
Division:

Role: sales person
User License: Salesforce Platform
Profile: sales person
Active:
Marketing User:
Offline User:
Knowledge User:
Flow User:
Service Cloud User:
Site.com Contributor User:
Site.com Publisher User:
WDC User:
Data.com User Type: --None--
Data.com Monthly Addition Limit: 300
Accessibility Mode (Classic Only):

User Edit
nookesh anakapalli

User Edit

General Information

First Name: nookesh
Last Name: anakapalli
Alias:inanak
Email: ndprasad0143@gmail.com
Username: nookesh@a.in
Nickname: nookesh
Title:
Company:
Department:
Division:

Role: sales person
User License: Salesforce Platform
Profile: sales person
Active:
Marketing User:
Offline User:
Knowledge User:
Flow User:
Service Cloud User:
Site.com Contributor User:
Site.com Publisher User:
WDC User:
Data.com User Type: --None--
Data.com Monthly Addition Limit: 300
Accessibility Mode (Classic Only):

Creating New Public Group

1. Go to setup >> type users in quick find box >> select public groups >> click New.
2. Give the Label as “sales team”.
3. Group name is autopopulated.
4. Search for Roles.
5. In Available Members select Sales person and click on add it will be moved to selected member.
6. Click on save.

Creating Sharing Settings

1. Go to setup >> type users in quick find box >> select Sharing Settings >> click Edit.
2. Change the OWD setting of the Service records Object to private
3. Click on save and refresh.
4. Scroll down a bit, Click new on Service records sharing Rules.

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

The screenshot shows the Salesforce Sharing Settings page. In the top navigation bar, there are three tabs: Smartinternz, Garage Management System, and Sharing Settings | Salesforce. The current tab is 'Sharing Settings'. The URL in the address bar is creative-impala-8qr0t3-dev.trailblaze.lightning.force.com/lightning/setup/SecuritySharing/page?address=%2Fsetup%2Fown%2FshareRule.jsp%3Fid%3D02edL00000001Lt%26enti...'. The main content area is titled 'Sharing Settings' and shows a 'Service records Sharing Rule' configuration. The rule has the following details:

Label	Sharing setting
Rule Name	Sharing_setting
Description	(empty)
Service records: owned by members of	Role: sales person
Share with	Role: Manager
Access Level	Read/Write
Created By	Anupama Dudi, 23/04/2024, 1:31 pm

At the bottom of the form are 'Save' and 'Cancel' buttons. On the left sidebar, under 'Setup', the 'Sharing Settings' tab is selected. A search bar at the top left contains 'shar'. The bottom of the screen shows a Windows taskbar with various icons and system status.

Create A Flow

1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.
2. Select the Record-triggered flow and Click on Create.
3. Select the Object as "Billing details and feedback" in the Drop down list.
4. Select the Trigger Flow when: "A record is Created or Updated".
5. Select the Optimize the flow for: "Actions and Related Records" and Click on Done.
6. Under the Record-triggered Flow Click on "+" Symbol and In the Drop down List select the "Update records Element".
7. Give the Label Name : Amount Update
8. Api name : is auto populated

Edit Update Records

Update Salesforce records using values from the flow.

*Label

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

Payment_Status__c

Operator

Equals

Value

Completed



+ Add Condition

Set Field Values for the Billing details and feedback Record

Field

Payment_Paid__c

Value

\$Record > Service records > Appointment > Service A...



+ Add Field

Cancel

Done

1. Set a filter condition : All Conditions are met(AND)
2. Field : Payment_Status__c
3. Operator : Equals
4. Value : Completed
5. And Set Field Values for the Billing details and feedback Record
6. Field : Payment_Paid__c

7. Value : {!\$Record.Service_records__r.Appointment__r.Service_Amount__c}
8. Click On Done.
9. Before creating another Element. Create a New Resource form Toolbox form top left.
10. Click on the New Resource, And select Variable.
11. Select the resource type as text template.
12. Enter the API name as " alert".
13. Change the view as Rich Text ? View to Plain Text.
14. In body field paste the syntax that given below.

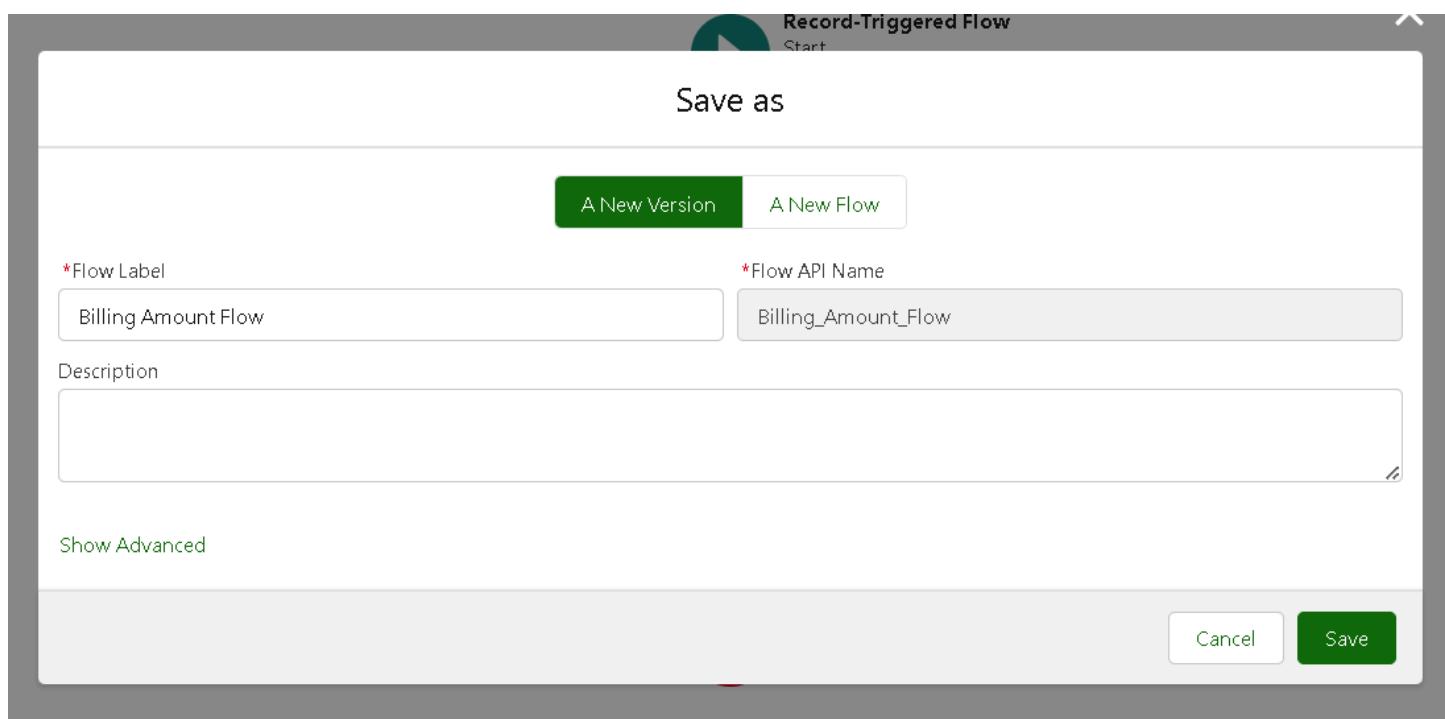
Dear {!\$Record.Service_records__r.Appointment__r.Customer_Name__r.Name},

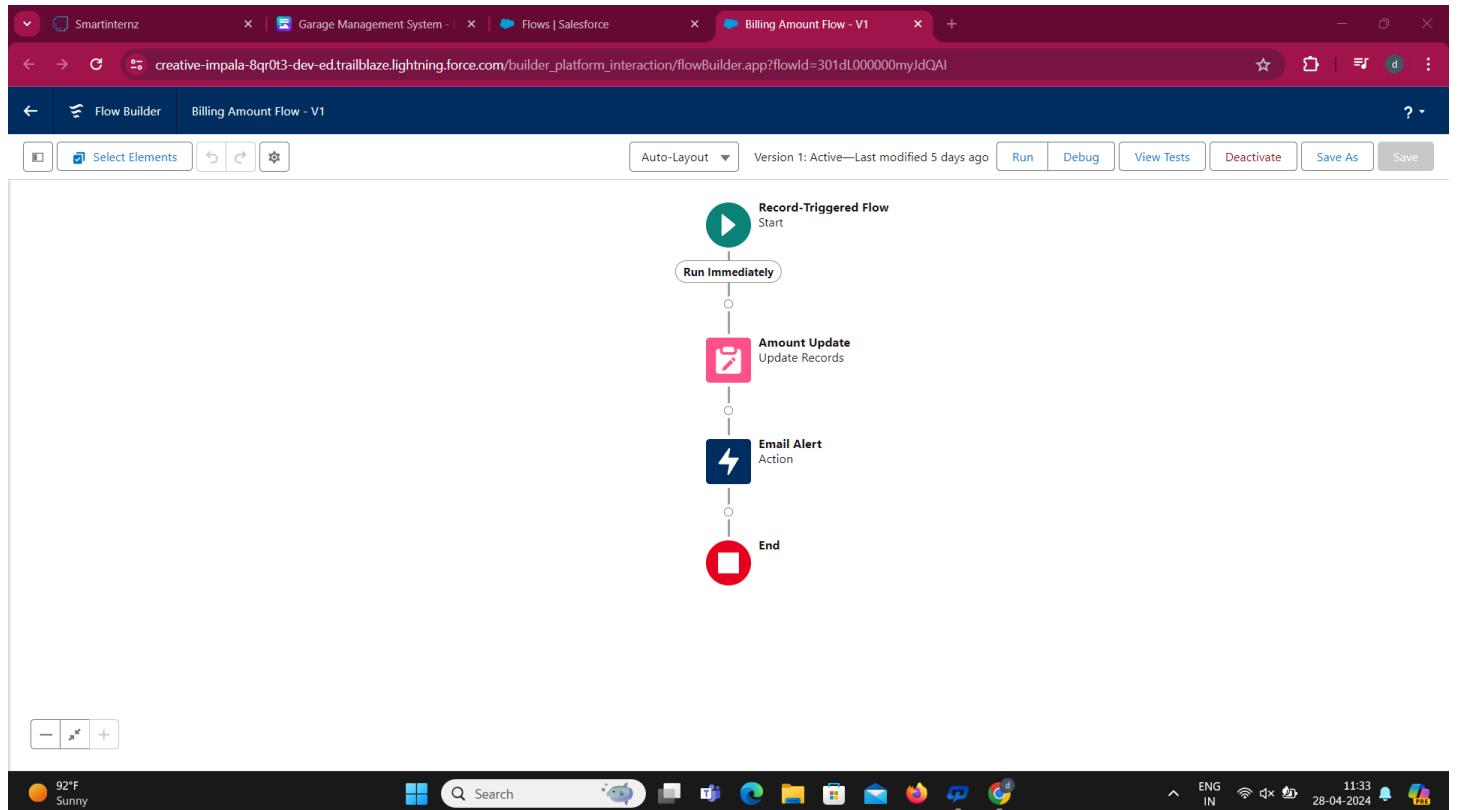
I hope this message finds you well. I wanted to take a moment to express my sincere gratitude for your recent payment for the services provided by our garage management team. Your prompt payment is greatly appreciated, and it helps us continue to provide top-notch services to you and all our valued customers.

Amount paid : {!\$Record.Payment_Paid__c}

Thank you for Coming .

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





Apex Handler

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

1. Login to the respective trailhead account and navigate to the gear icon in the top right corner.
2. Click on the Developer console. Now you will see a new console window.
3. In the toolbar, you can see FILE. Click on it and navigate to new and create New apex class.
4. Name the class as “AmountDistributionHandler” .

```
AmountDistribution.apxc  AmountDistributionHandler.apxc + 0
Code Coverage: None API Version: 58 Go To
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    }
}
```

AmountDistribution.apxt AmountDistributionHandler.apxc *

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){

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

        for(Appointment__c app : listApp){

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

                app.Service_Amount__c = 10000;

            }

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

                app.Service_Amount__c = 5000;

            }

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

                app.Service_Amount__c = 8000;

            }

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

                app.Service_Amount__c = 7000;

            }

        }

    }

}
```

```
}

else if(app.Maintenance_service__c == true){

app.Service_Amount__c = 2000;

}

else if(app.Repairs__c == true){

app.Service_Amount__c = 3000;

}

else if(app.Replacement_Parts__c == true){

app.Service_Amount__c = 5000;

}

}

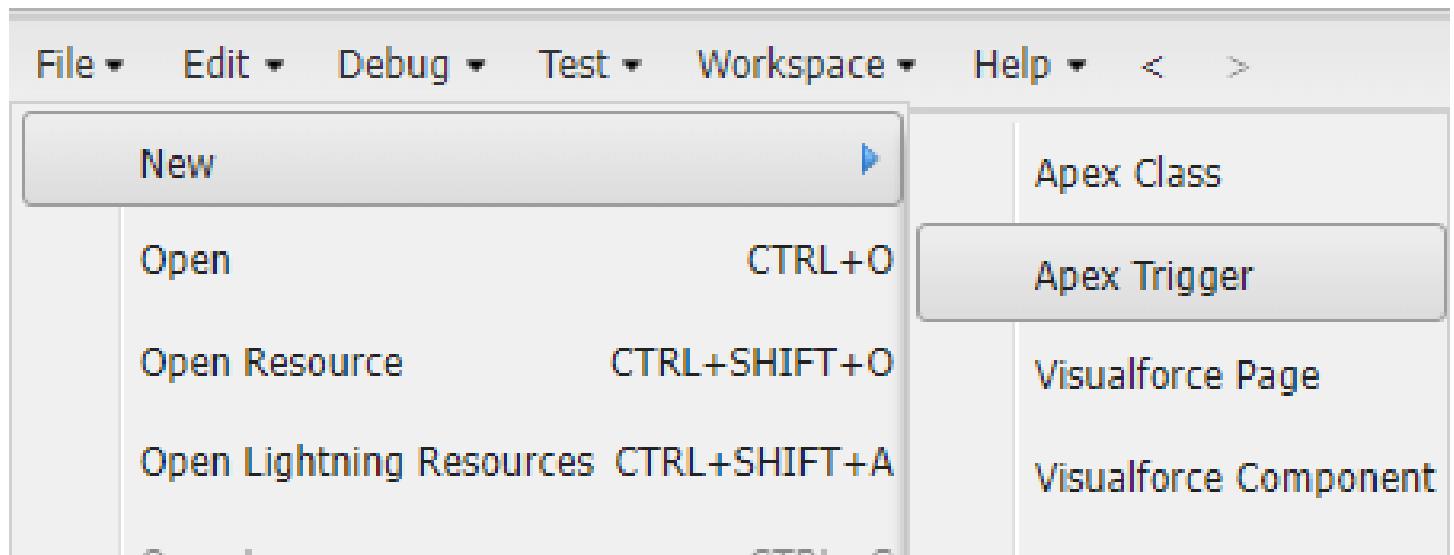
}

}
```

Trigger Handler :

How to create a new trigger :

1. While still in the trailhead account, navigate to the gear icon in the top right corner.
2. Click on developer console and you will be navigated to a new console window.
3. Click on File menu in the tool bar, and click on new? Trigger.
4. Enter the trigger name and the object to be triggered.
5. Name : AmountDistribution
6. sObject : Appointment__c



New Apex Trigger

Name:

sObject:

Submit

Syntax For creating trigger :

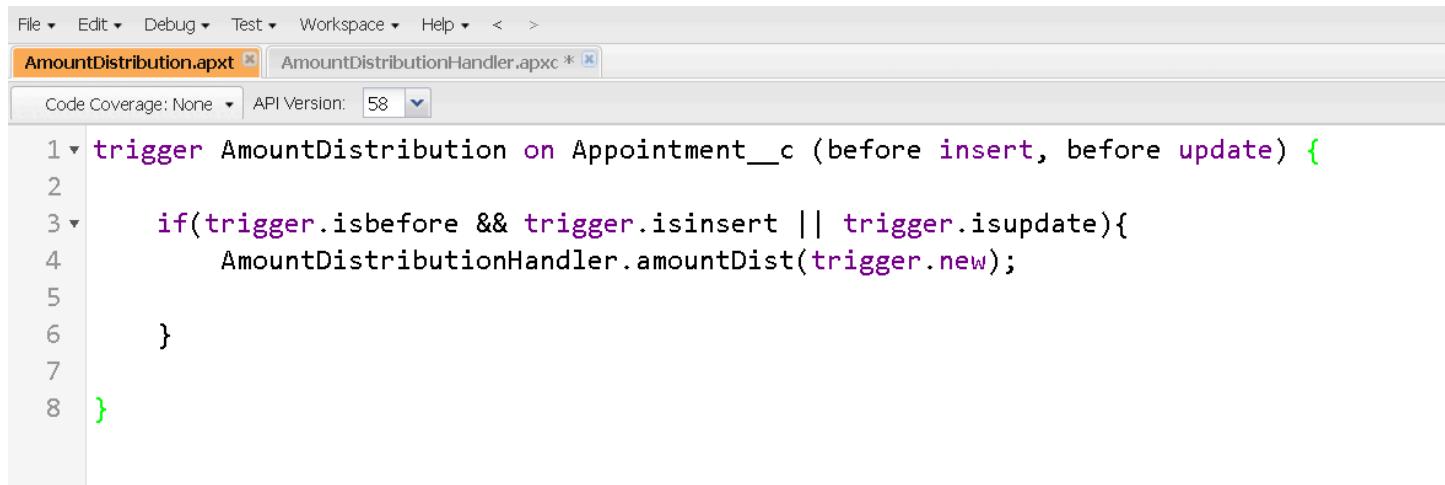
The syntax for creating trigger is :

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



The screenshot shows a Salesforce IDE interface with two tabs: "AmountDistribution.apxt" and "AmountDistributionHandler.apxc". The "AmountDistributionHandler.apxc" tab is active, displaying a trigger for the "Appointment__c" object. The code is as follows:

```
1 trigger AmountDistribution on Appointment__c (before insert, before update) {  
2  
3     if(trigger.isbefore && trigger.isinsert || trigger.isupdate){  
4         AmountDistributionHandler.amountDist(trigger.new);  
5     }  
6 }  
7  
8 }
```

Code:

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

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

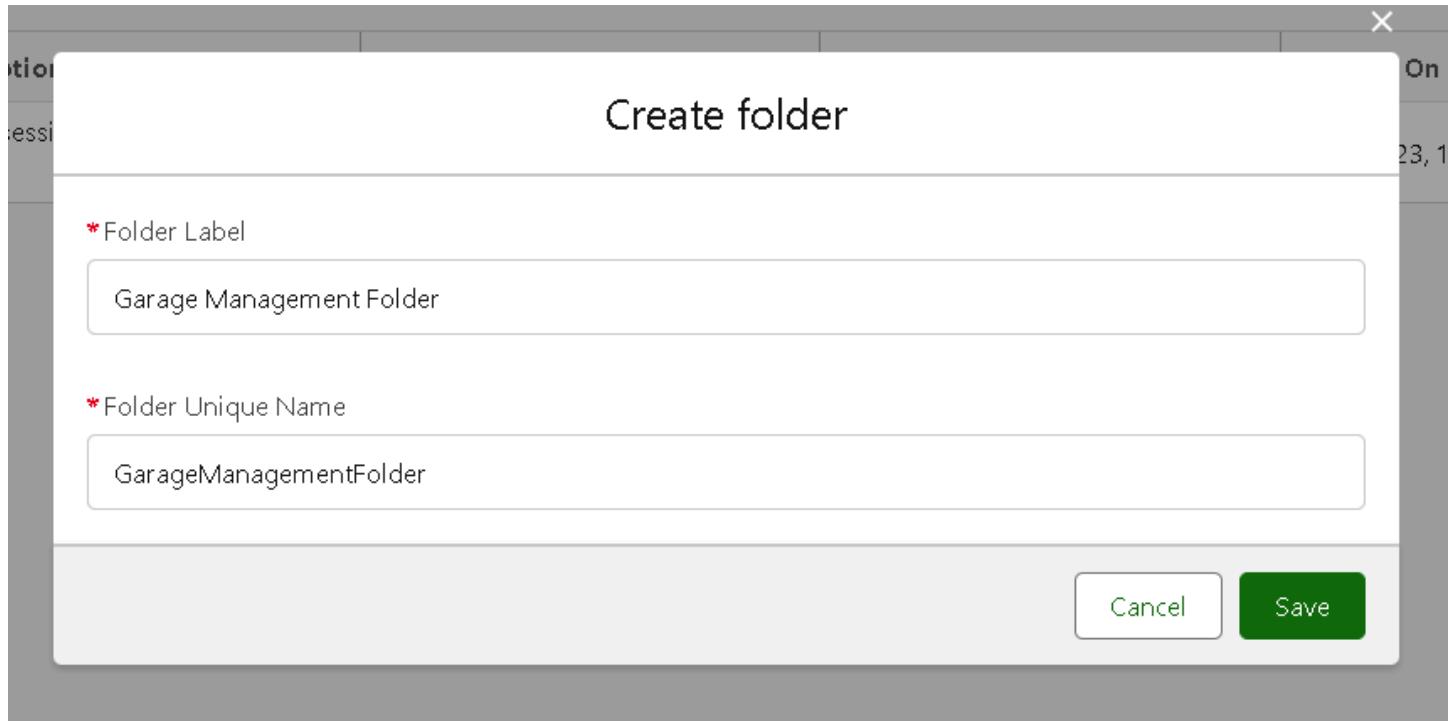
```
        AmountDistributionHandler.amountDist(trigger.new);
```

```
}
```

```
}
```

Create A Report Folder

1. Click on the app launcher and search for reports.
2. Click on the report tab, click on new folder.
3. Give the Folder label as “Garage Management Folder”, Folder unique name will be auto populated.
4. Click save.



Sharing A Report Folder

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

Create Report Type

1. Go to setup >> type users in quick find box >> select Report Type >> click on Continue.
2. Click on new custom report type.
3. Select the Primary object as “ Customer details” .
4. Give the Report type Label as “ Service information ”
5. Report type Name is autopopulated.
6. Keep the Description as same.
7. Select Store in Category as “ other Reports ”
8. Select the deployment status as “ Deployed ”, click on Next.

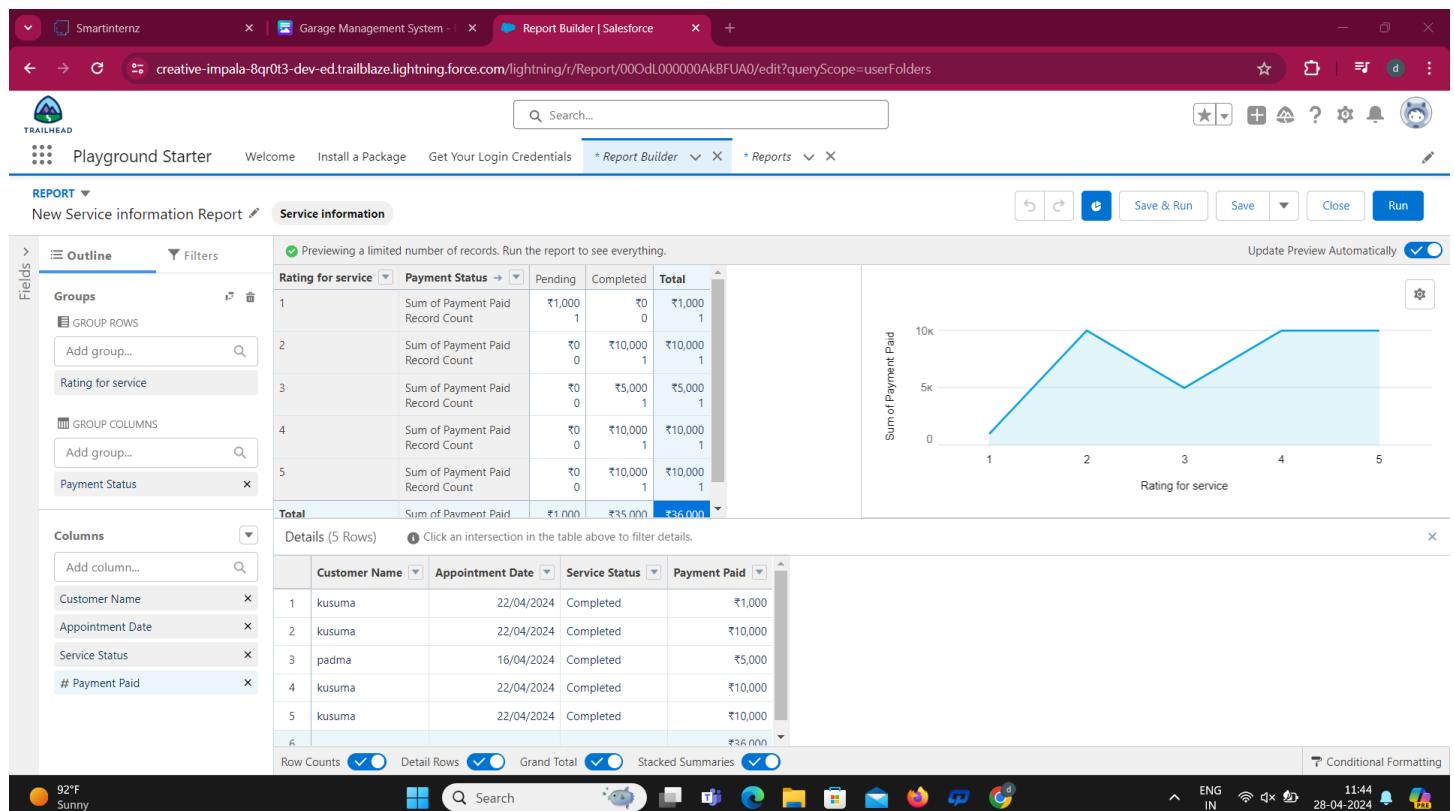
1. now , Click on Related object box.
2. Click on Select Object, choose Appointment Object
3. Again Click to relate another object.
4. And select the related object as “ service records”.
5. Repeat the process and select the related object as “ Billing details and feedback”.
6. And click on save.

Create Report

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

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

1. Go to the app >> click on the reports tab
2. Click New Report.
3. Select the Category as other reports, search for Service Information, select that report, click on it. And click on start report.
4. Their outline pane is opened already, select the fields that mentioned below in column section.
 1. Customer name
 2. Appointment Date
 3. Service Status
 4. Payment paid
5. Remove the unnecessary fields.
6. Select the fields that mentioned below in GROUP ROWS section.
 1. Rating for Service
7. Select the fields that mentioned below in GROUP ROWS section.
 1. Payment Status
8. Click on Add Chart , Select the Line Chart.
9. Click on save, Give the report Name : New Service information Report
10. Report unique Name is auto populated.
11. Select the folder the created and Click on save.



Create Dashboard Folder

1. Click on the app launcher and search for dashboard.
2. Click on dashboard tab.
3. Click new folder, give the folder label as “ Service Rating dashboard”.
4. Folder unique name will be auto populated.
5. Click save.

Create folder

* Folder Label
Service Rating

* Folder Unique Name
ServiceRating

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

Follow the same steps, from milestone 15, and activity 2, and provide the sharing settings for the folder that just created.

Create Dashboard

1. Go to the app >> click on the Dashboards tabs.
2. Give a Name and select the folder that created, and click on create.
3. Select add component.
4. Select a Report and click on select.
5. Select the Line Chart. Change the theme.
6. Click Add then click on Save and then click on Done.

New Service information Report

Payment Status

Pending →

Completed →

Sum of Payment Paid

Rating for service

View Report (New Service information Report)

92°F Sunny

Search

ENG IN

11:47 28-04-2024

1. After that Click on Subscribe on top right.
2. Set the Frequency as “ weekly ”.

3. Set a day as monday.
4. And Click on save.

Smartinternz | Garage Management System | Customer review | Salesforce

creative-impala-8qr0t3-dev-ed.trailblaze.lightning.force.com/lightning/r/01ZdL000004Q0UAE/view?queryScope=userFolders

Playground Starter Welcome Inst...

Dashboard Customer review As of 28-Apr-2024, 11:48 am: Viewing as Anupama Dudi

New Service information Report

Sum of Payment Paid

Rating for service

View Report (New Service information Report)

Edit Subscription

Schedule dashboard refreshes and subscribe to receive results.

Settings

Frequency: Weekly

Days: Mon

Time: 8:00 pm

Recipients

Receive new results by email when dashboard is refreshed. ⓘ

Send email to: Me

Edit Recipients

Unsubscribe Cancel Save

92°F Sunny

Search

11:48 28-04-2024 ENG IN

