Garage Management System

User Story:

The **Garage Management System (GMS)** is designed to help garage owners and staff efficiently manage daily operations, including customer records, vehicle details, service tracking, and billing. It allows receptionists to register customers and their vehicles, while service advisors can assign repair jobs to mechanics and monitor their progress in real time. The system also manages spare parts inventory, automatically updating stock levels when parts are used and sending alerts for low stock. Once a service is completed, invoices are generated instantly with accurate details for labor and parts. Managers can view detailed reports on revenue, service trends, and mechanic performance to make better business decisions. Role-based access ensures data security and prevents unauthorized access. Overall, the GMS simplifies workflow, reduces paperwork, and enhances customer satisfaction by streamlining all garage operations in one centralized platform.

Project Overview :

The **Garage Management System** is a digital solution designed to streamline and automate garage operations. It helps manage customer details, vehicle records, repair jobs, and billing efficiently. The system allows staff to assign tasks, monitor job progress, and maintain parts inventory. It also generates invoices and reports for better financial and performance tracking. Overall, it improves service quality, reduces manual work, and enhances customer satisfaction.

Project Flow:

Milestone 1 :Salesforce
Milestone 2 : Object
Milestone 3 : Tabs
Milestone 4 : The Lightning App
Milestone 5 : Fields
Milestone 6 : Validation rule
Milestone 7 : Duplicate rule
Milestone 8 : Profiles
Milestone 9 : Role& Role Hierarchy
Milestone 10 :Users
Milestone 11 : Public Groups
Milestone 12 : Sharing Setting
Milestone 13 : Flows
Milestone 14 : Apex Triggers
Milestone 15 : Reports
Milestone 16 : Dashboards

Milestone 17 :User Adoption

What you'll learn

- System Design & Architecture
- Database Management
- CRUD Operations
- User Interface Design
- Role-Based Access Control
- Inventory & Billing Automation
- Report Generation
- Problem-Solving Skills
- Project Deployment

Milestone 1-Salesforce Account

Introduction:

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

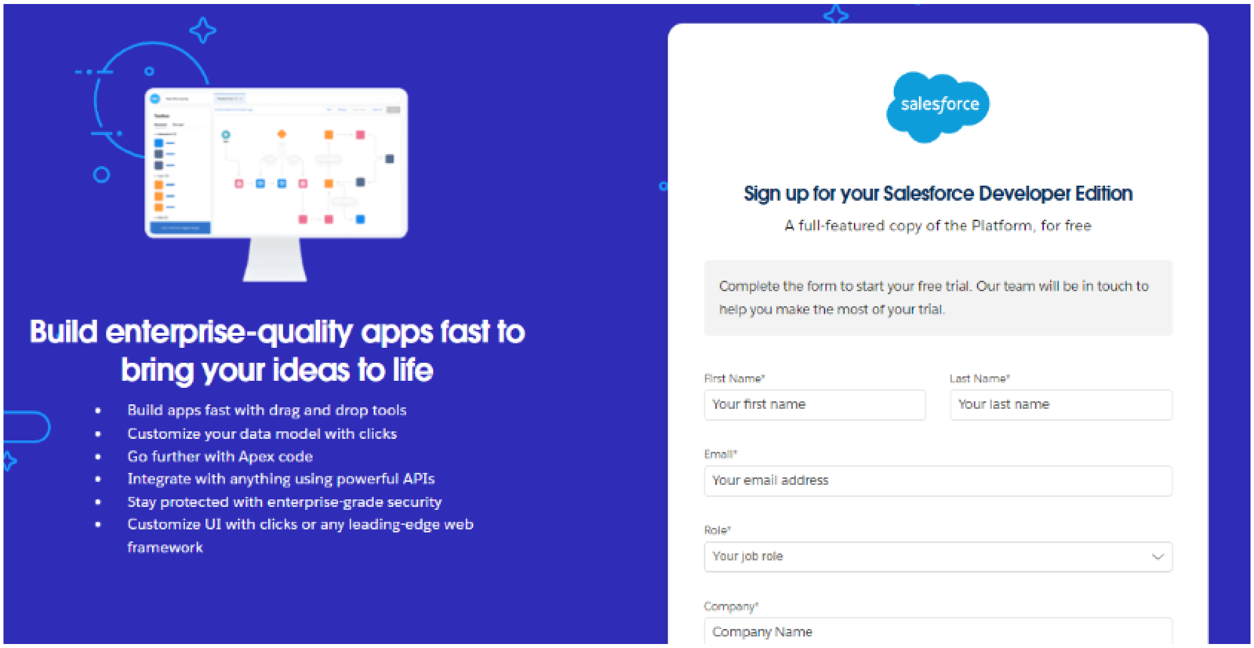
What Is Salesforce

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers. Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud. So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this: https://youtu.be/r9EX3lGde5k

Activity 1: Creating Developer Account

Creating a developer org in salesforce.

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

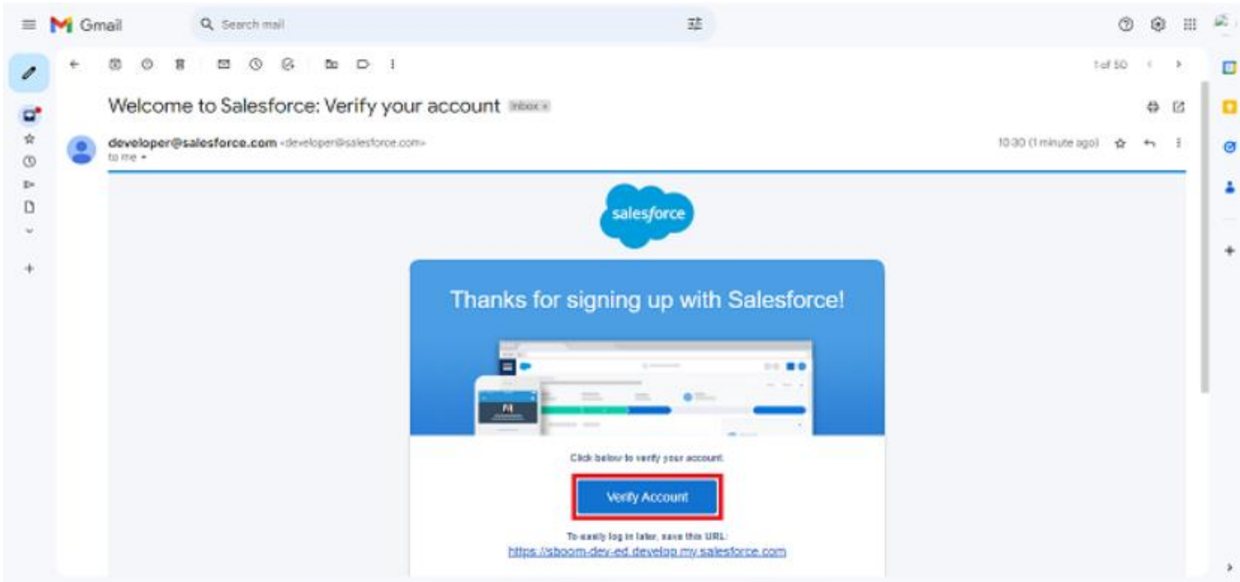


1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code

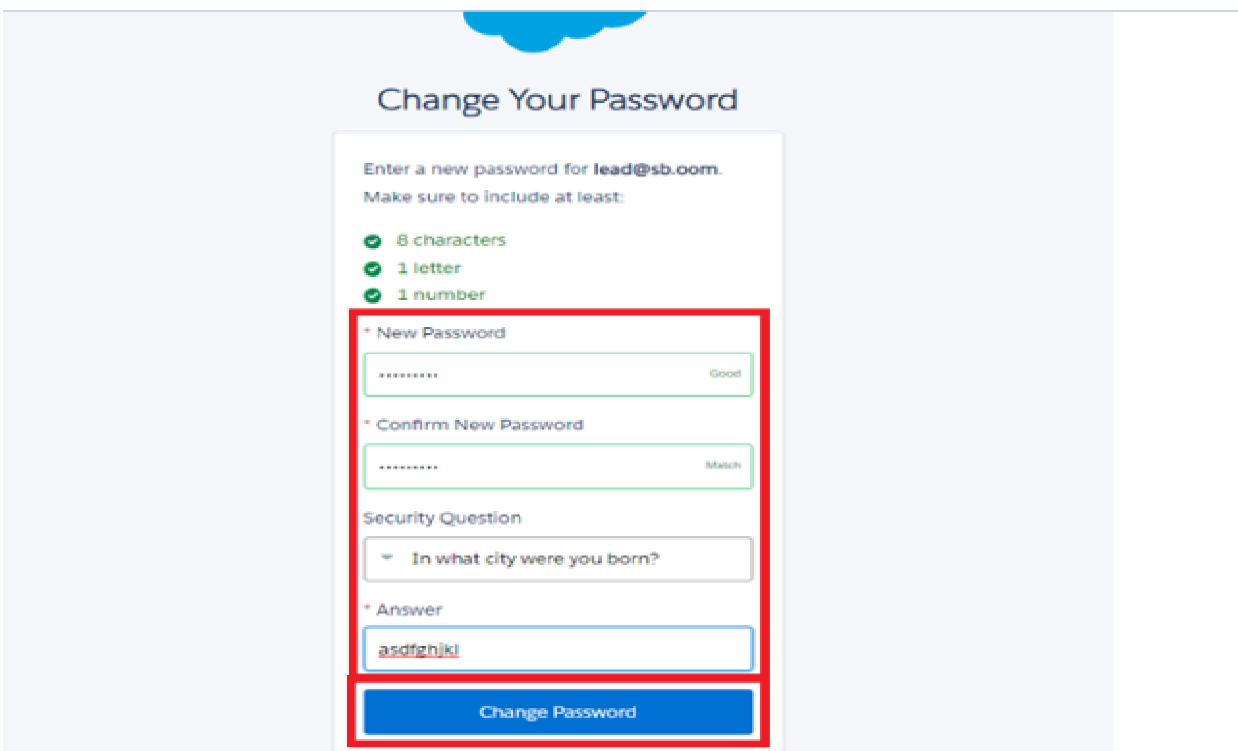
Username : should be a combination of your name and company
This need not be an actual email id, you can give anything in the format: username@organization.com
Click on sign me up after filling these.

Activity 2: Account Activation

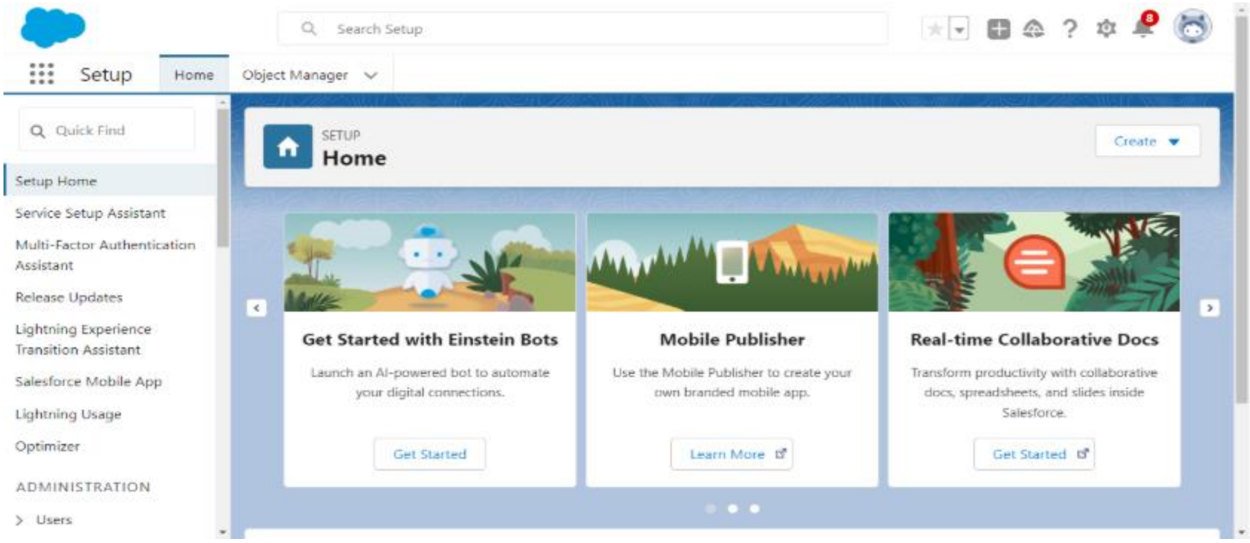
1.Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



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.



Milestone 2- Objects

In Salesforce, objects are database tables that allow you to store data specific to your organization.

Activity 1:Create Customer Details Object

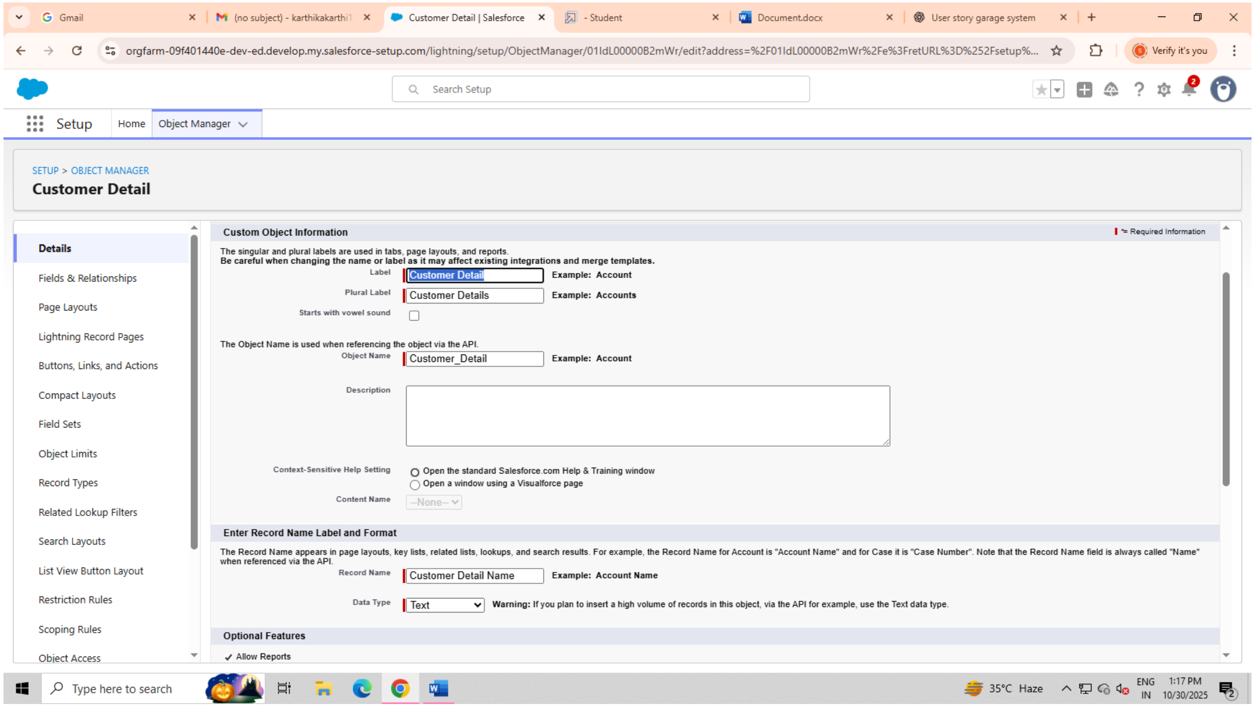
To create an object:

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

1. Enter the label name >> Customer Details
2. Plural label name >> Customer Details
3. Enter Record Name Label and Format
    - Record Name >> Customer Name
    - Data Type >> Text

2.Click on Allow reports and Track Field History,

3.Allow search >> Save.



Activity 2:Create Appointment Object

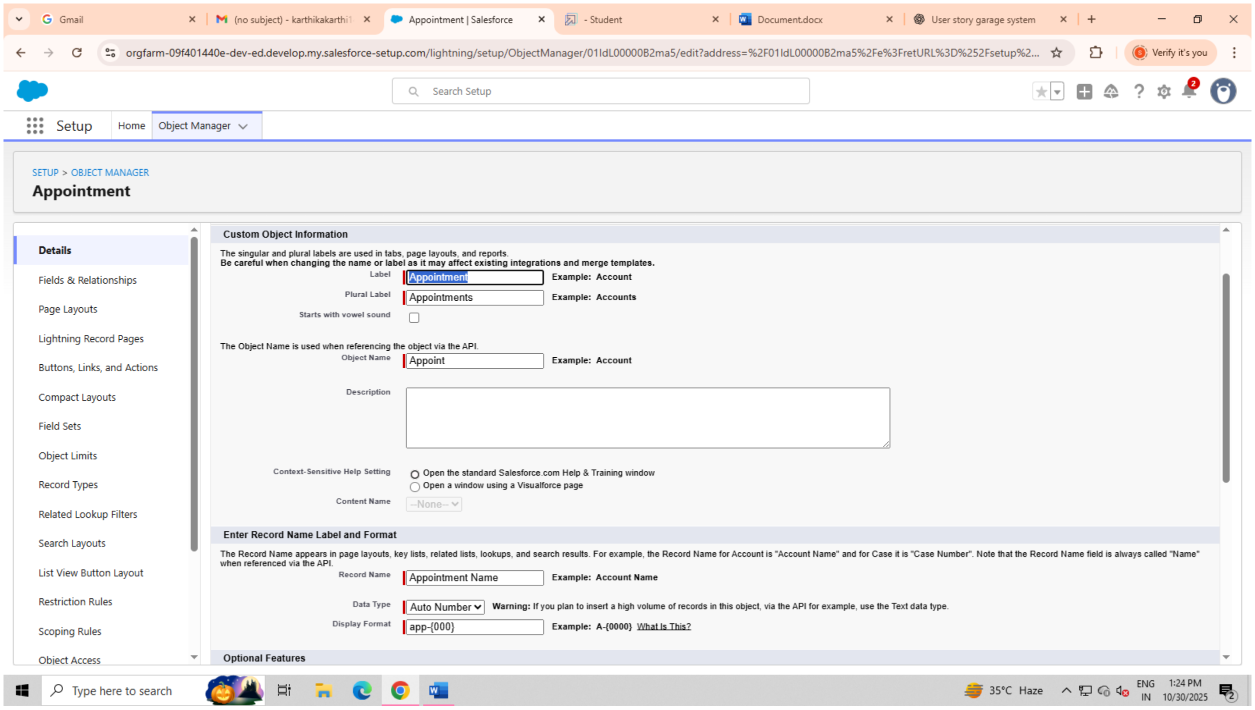
To create an object:

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

1. Enter the label name >> Appointment
2. Plural label name >> Appointments
3. Enter Record Name Label and Format
   - Record Name >> Appointment Name
   - Data Type >> Auto Number
   - Display Format >> app-{000}
   - Starting number >> 1

2.Click on Allow reports and Track Field History,

3.Allow search >> Save.



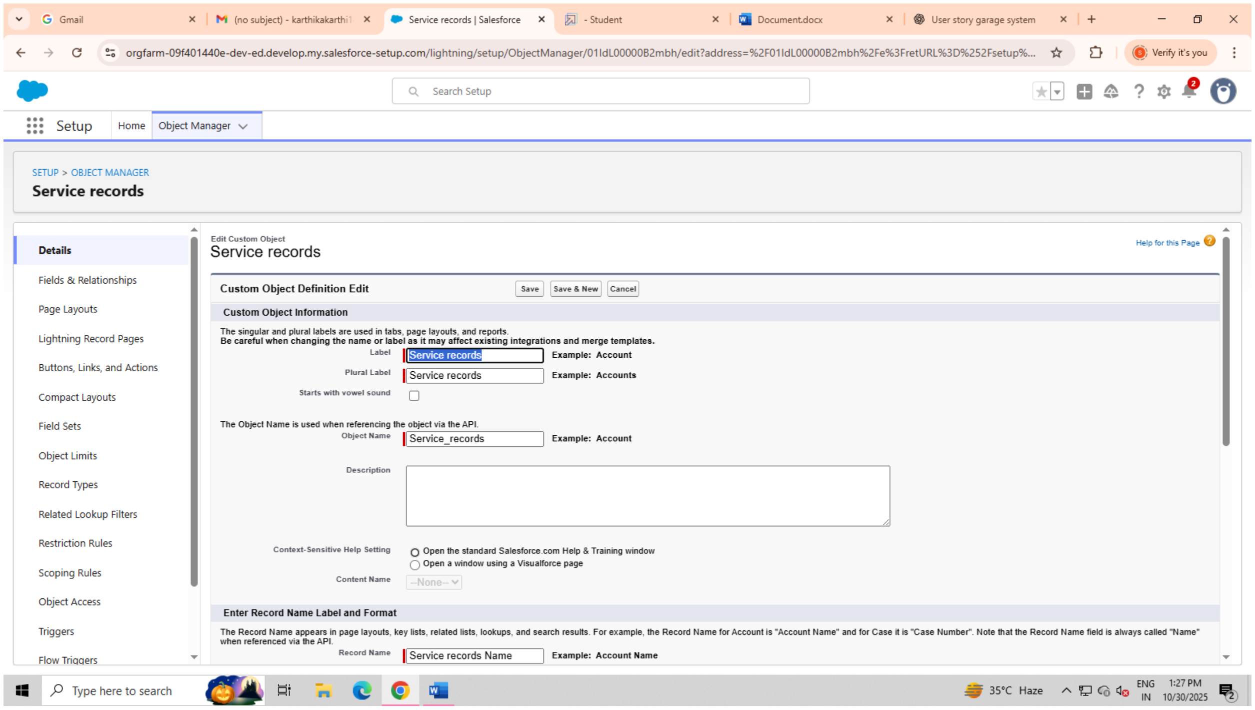
Activity 3:Create Service Record Object

To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
    1. Enter the label name >> Service records
    2. Plural label name >> Service records
    3. Enter Record Name Label and Format
        - Record Name >>Service records Name
        - Data Type >> Auto Number
        - Display Format >> ser-{000}
        - Starting number >> 1

2.Click on Allow reports and Track Field History,

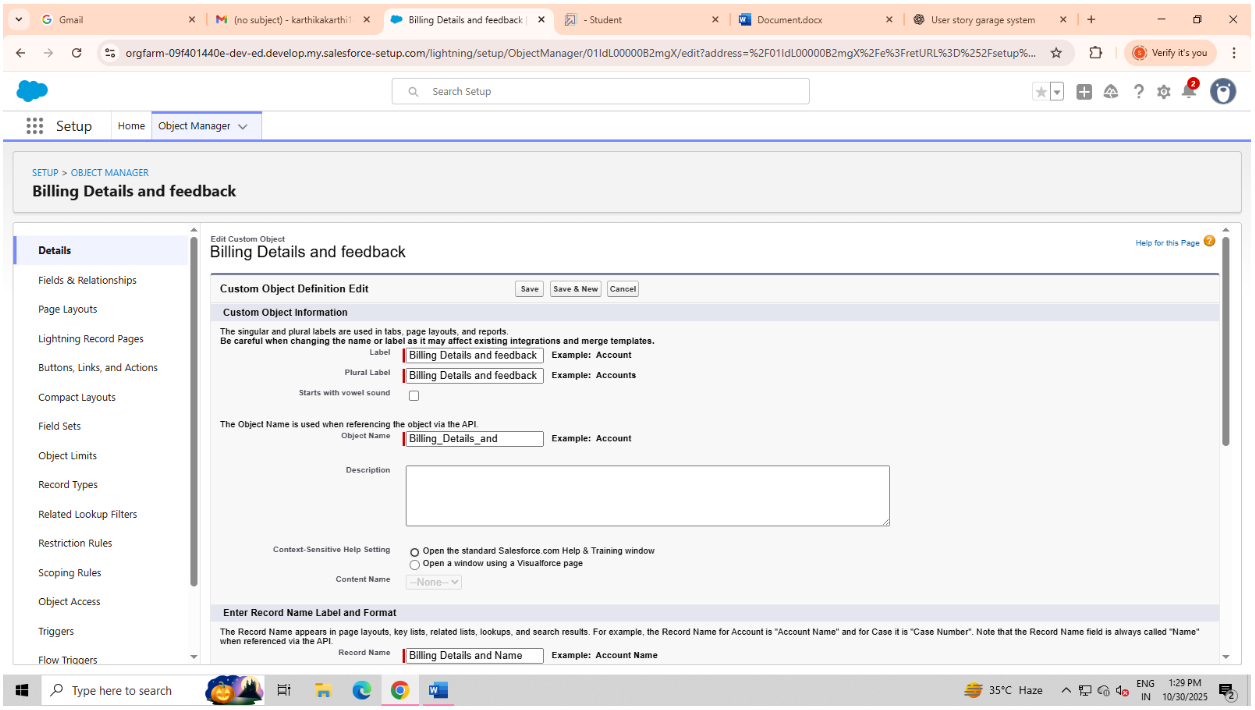
3.Allow search >> Save.



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



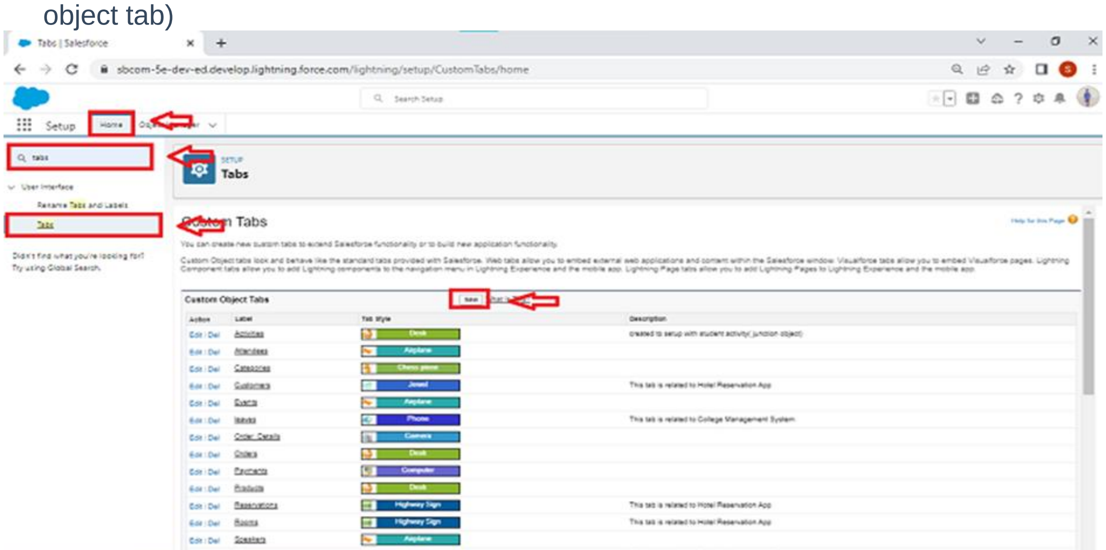
Milestone 3- Tabs

In Salesforce, tabs are used to make the data stored in objects accessible to users through the user interface. Tabs are a fundamental part of the Salesforce interface, providing a way to navigate to different objects and records.

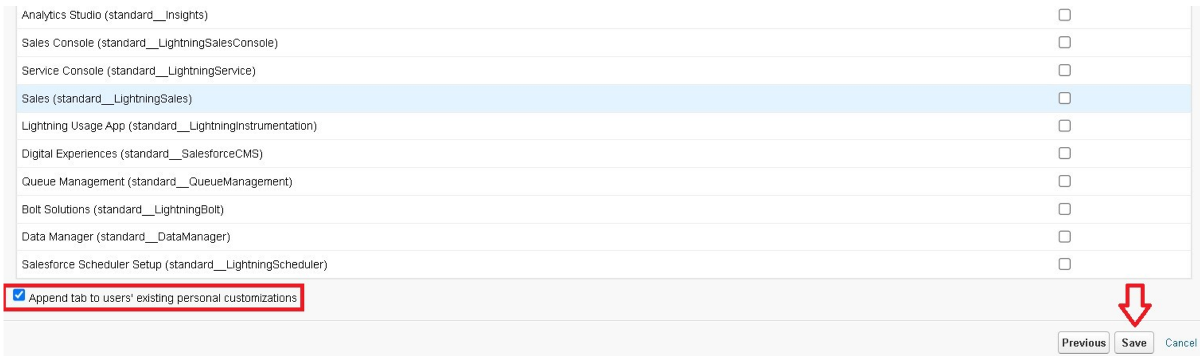
Activity 1:Creating A Custom Tab

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)

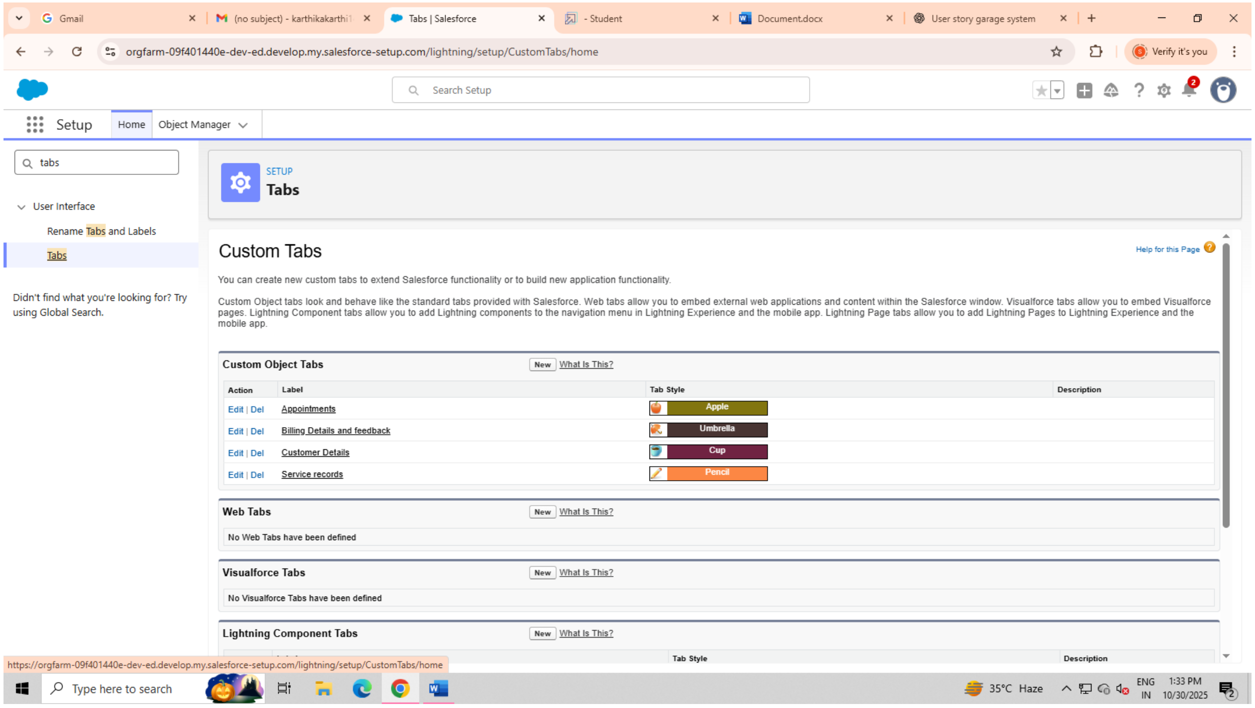


2. Select Object(Customer Details) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .
3. Make sure that the Append tab to users' existing personal customizations is checked.
4. Click save.



Activity 2: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 in Activity -1



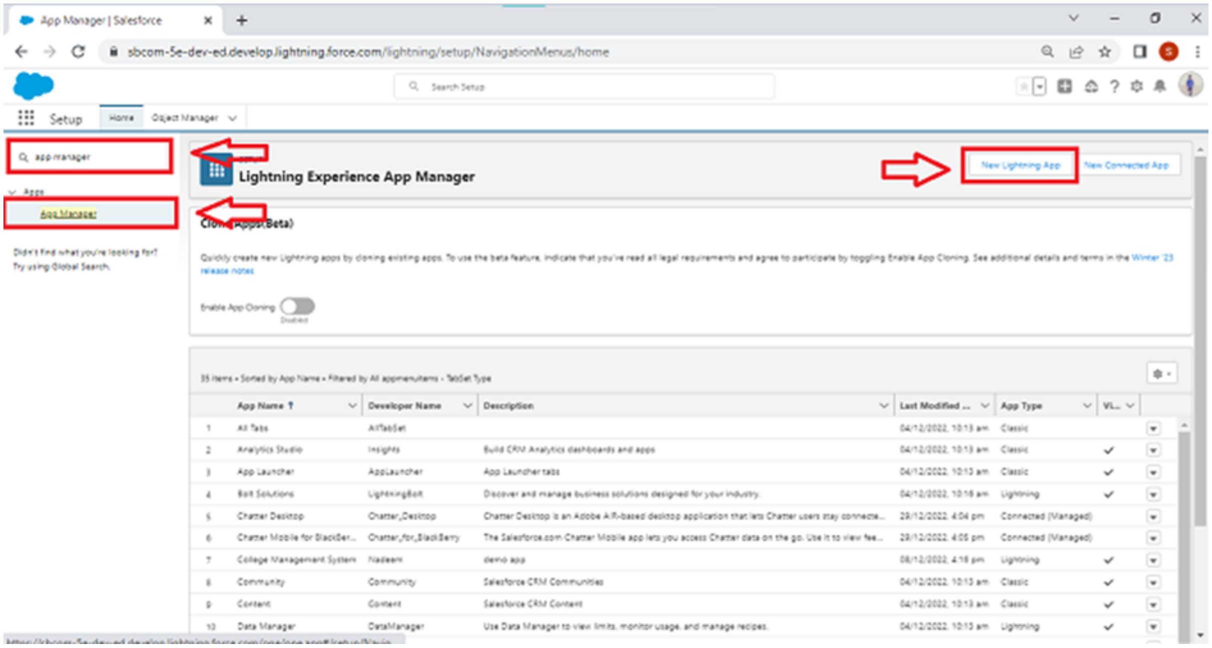
Milestone 4- The Lightning App

A Lightning App in Salesforce is a collection of items that work together to serve a particular function for the end-users. These items can include standard and custom objects, tabs, utilities, and other productivity tools. Lightning Apps are designed to provide a more intuitive and efficient user experience compared to traditional Salesforce apps.

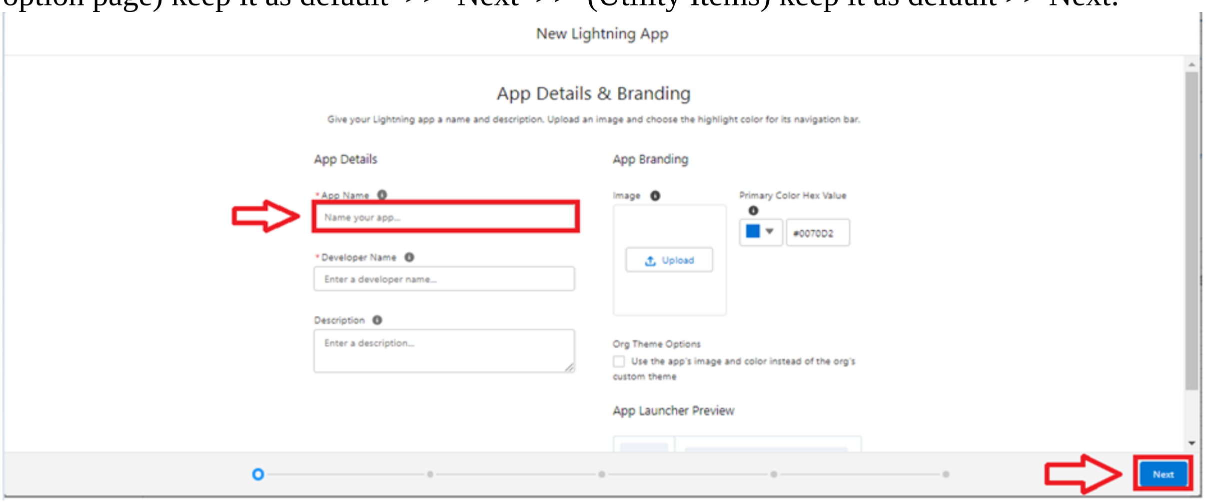
Activity 1:Creating A Lighting App

To create a lightning app page:

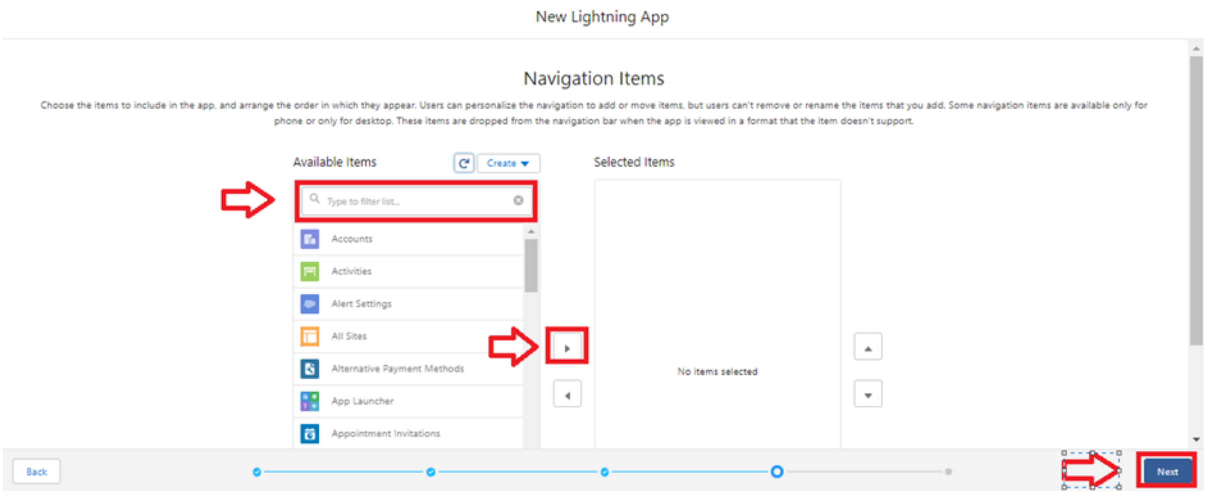
1. Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App.



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.

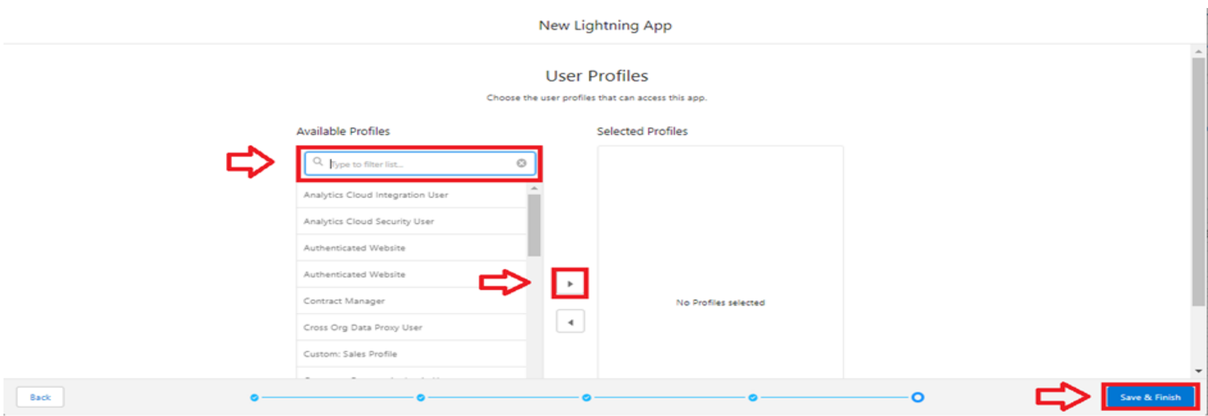


3. To Add Navigation Items:



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.

5. To Add User Profiles:



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

Milestone 5-Fileds

We talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

Types of Fields

1. Standard Fields
2. Custom Fields

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

- Created By
- Owner
- Last Modified
- Field Made During object Creation

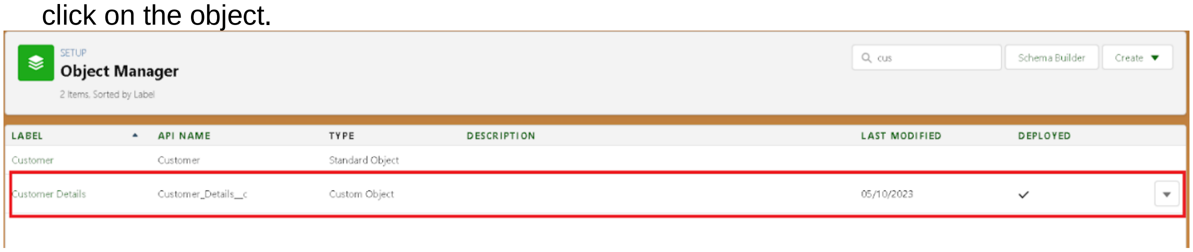
Custom Fields:

On the other side of the coin, Custom Fields are highly flexible, and users can change them according to requirements. Moreover, each organiser or company can use them if necessary. It means you need not always include them in the records, unlike Standard fields. Hence, the final decision depends on the user, and he can add/remove Custom Fields of any given form.

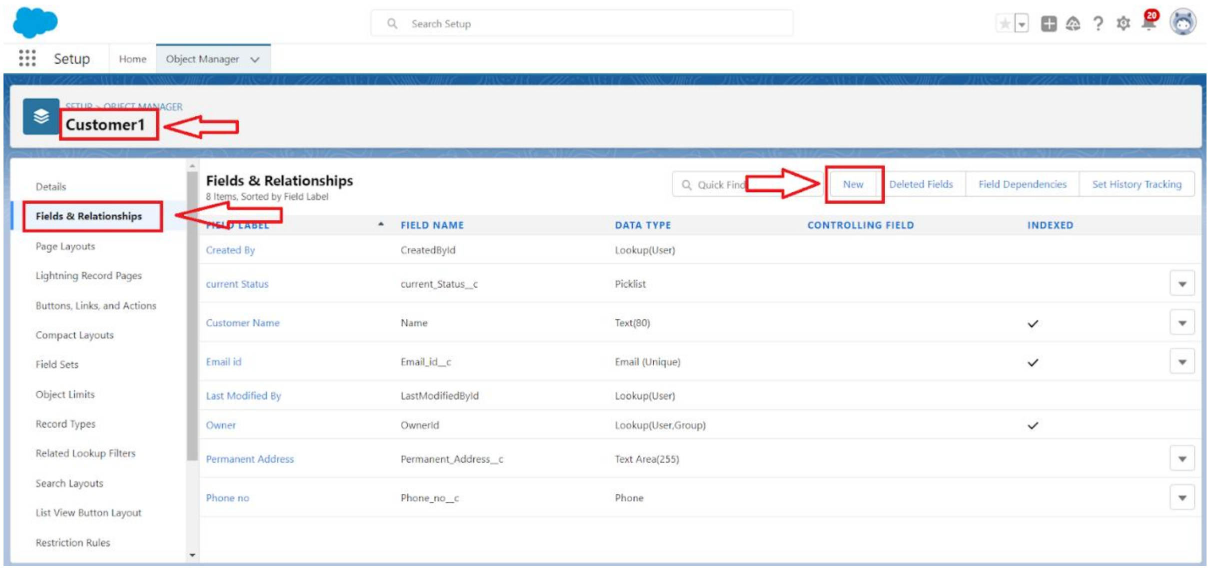
Activity 1:Creation Of Fileds For The Customer Details Object

To create fields in an object:

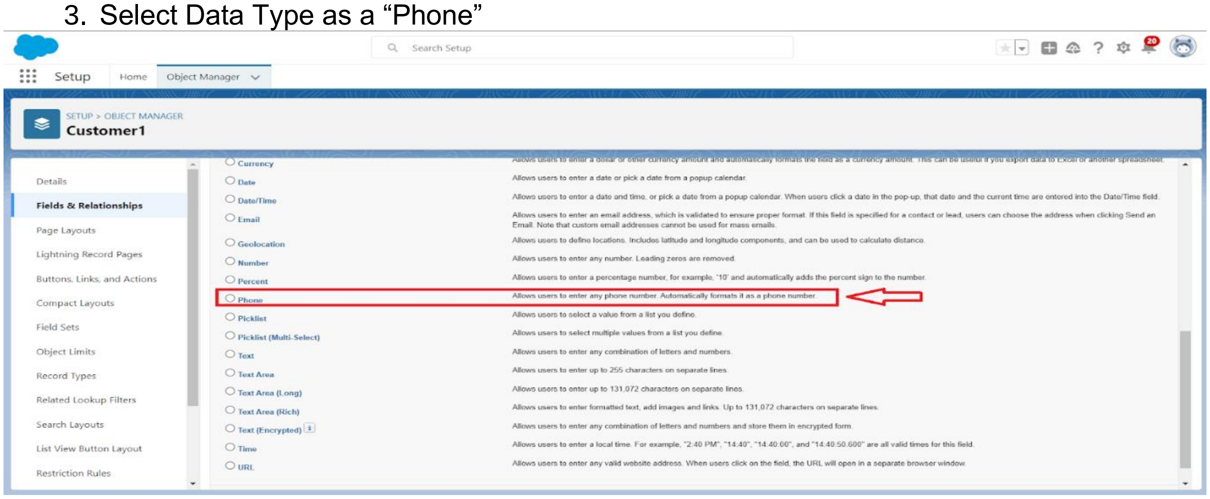
1. Go to setup >> click on Object Manager >> type object name(Customer Details) in search bar >> click on the object.



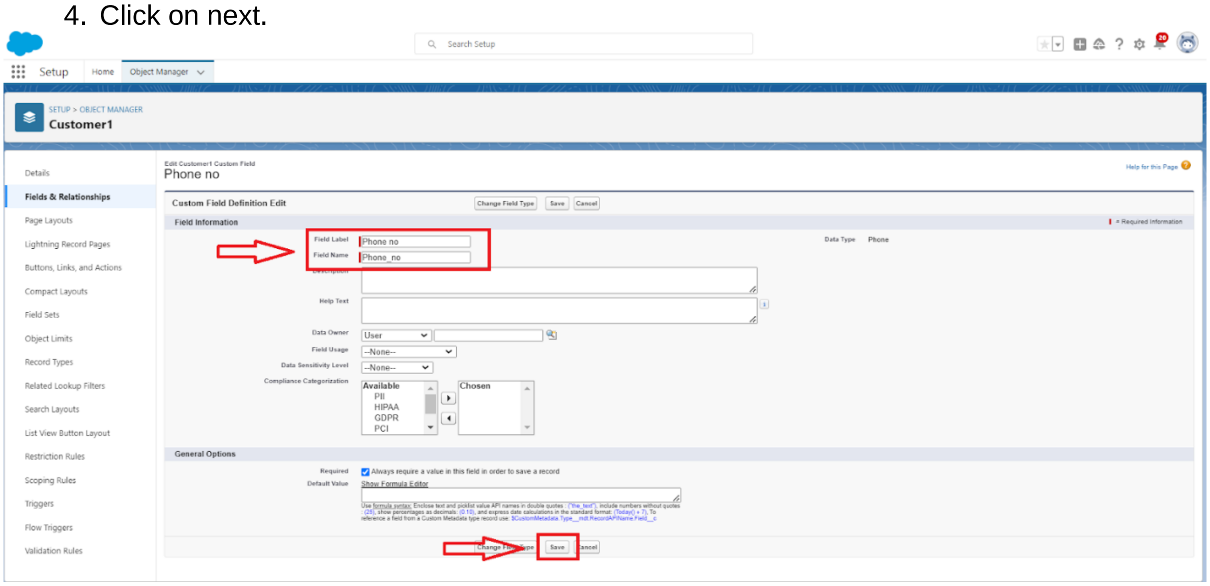
2. Now click on "Fields & Relationships" >> New



3. Select Data Type as a “Phone”



4. Click on next.



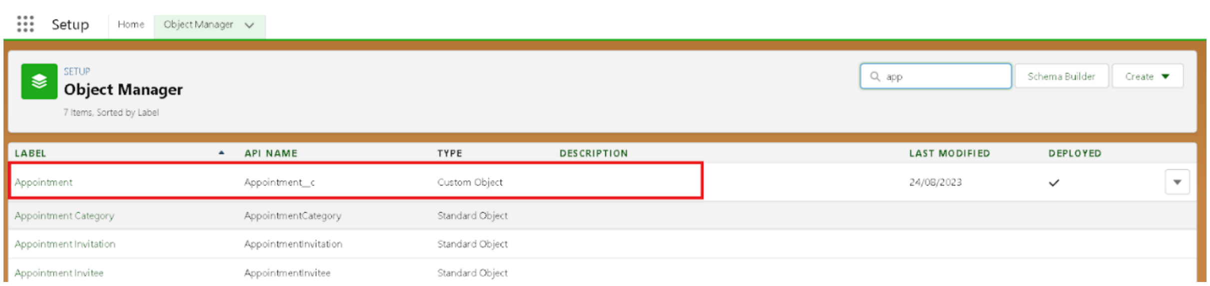
5. Fill the Above as following:
- Field Label: Phone number
- Field Name : gets auto generated
- Click on Next >> Next >> Save and new.

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

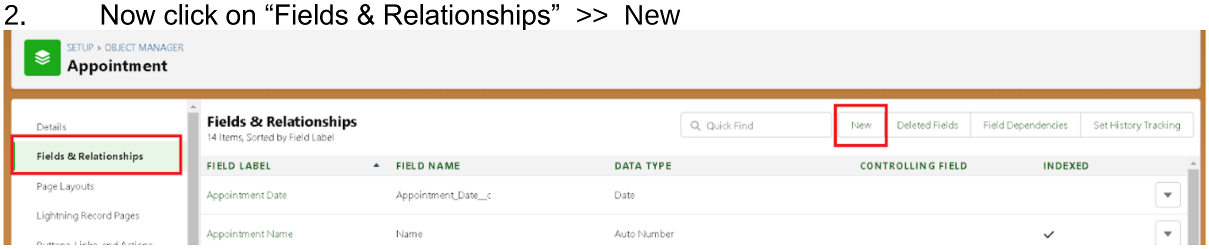
2. To create another fields in an object:
1. Go to setup >> click on Object Manager >> type object name(Customer Details) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Email” and Click on Next
4. Fill the Above as following:
   - Field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

Activity 2:Creation Of Lookup Fields

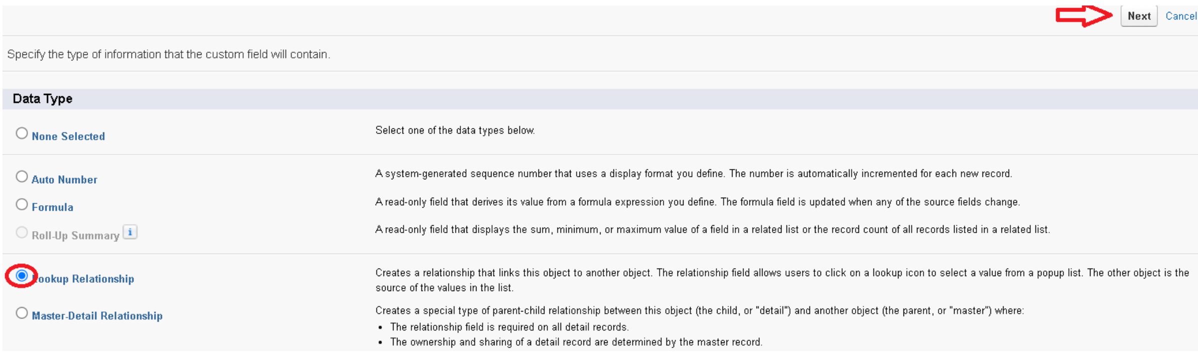
1. Go to setup >> click on Object Manager >> type object name(Appointment) in the search bar >> click on the object.



2. Now click on “Fields & Relationships” >> New



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

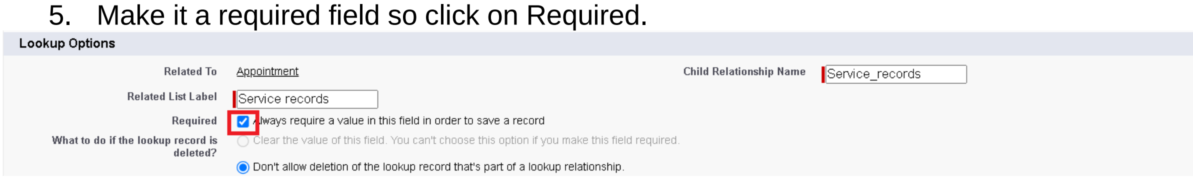


4. Select the related object “ Customer Details” and click next.
5. Next >> Next >> Save.

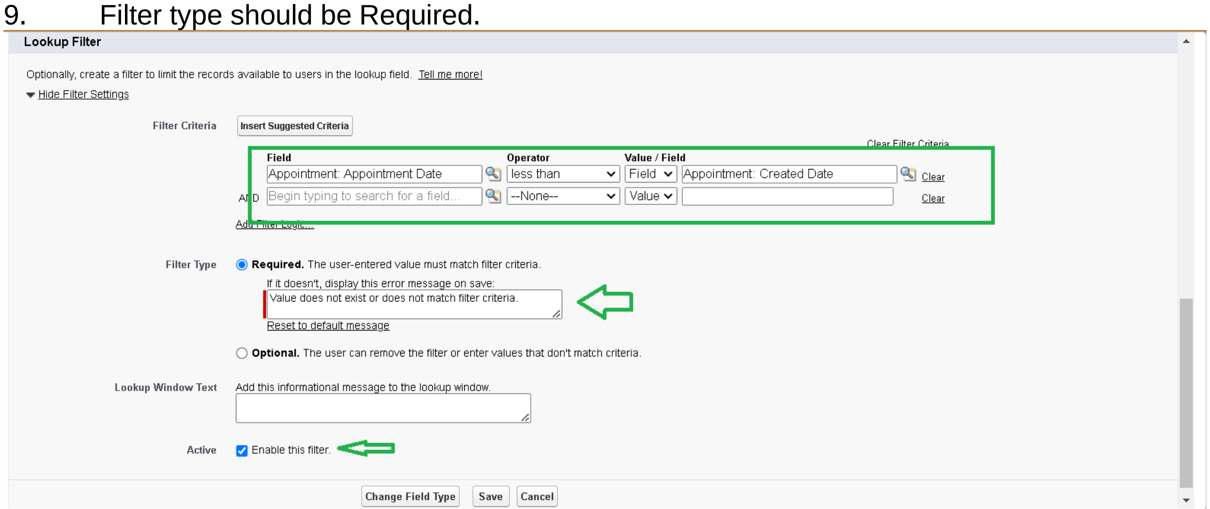
Note: Make sure you complete Activity 4 Before continuing.

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.



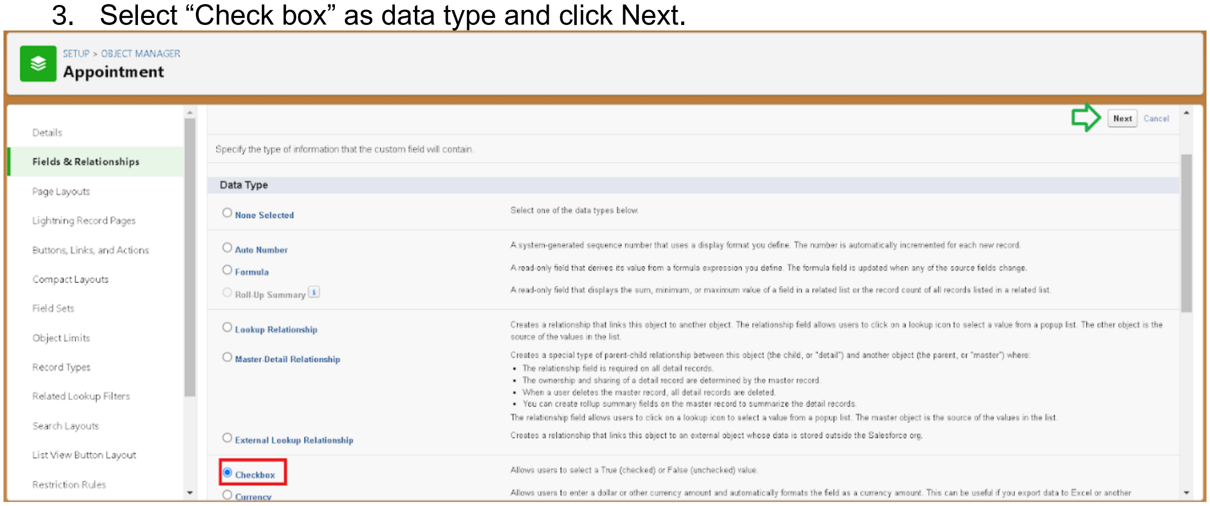
10. Error Message : Value does not match the criteria.
11. Enable the filter by click on Active.
12. Next >> Next >> Save.

Creation of Lookup Field on Billing details and feedback Object :

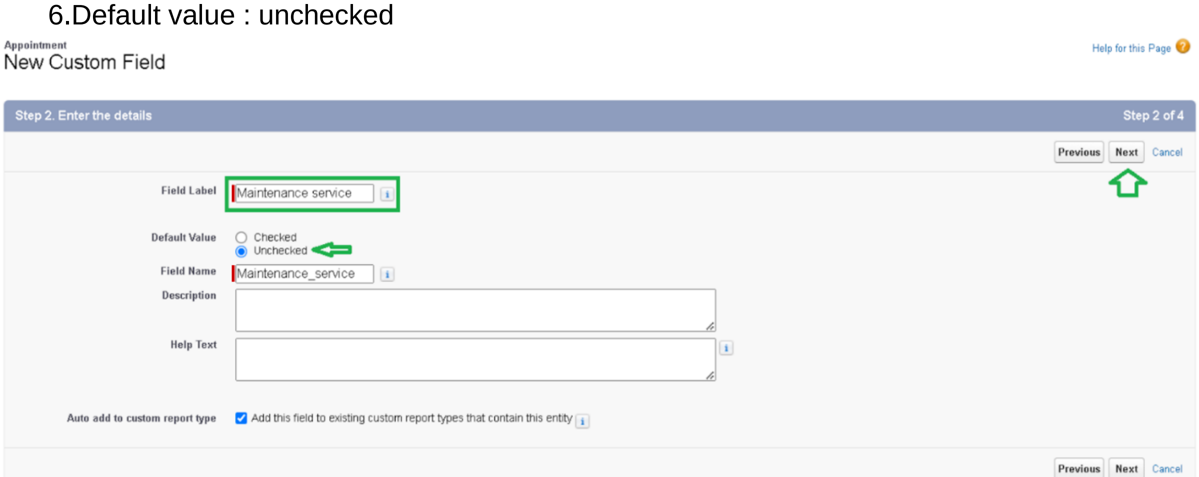
1. Go to setup >> click on Object Manager >> type object name(Billing details and feedback) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select “Look-up relationship” as data type and click Next.
4. Select the related object “ Service records” and click next.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

Activity 3:Creation Of CheckBox Fields

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.



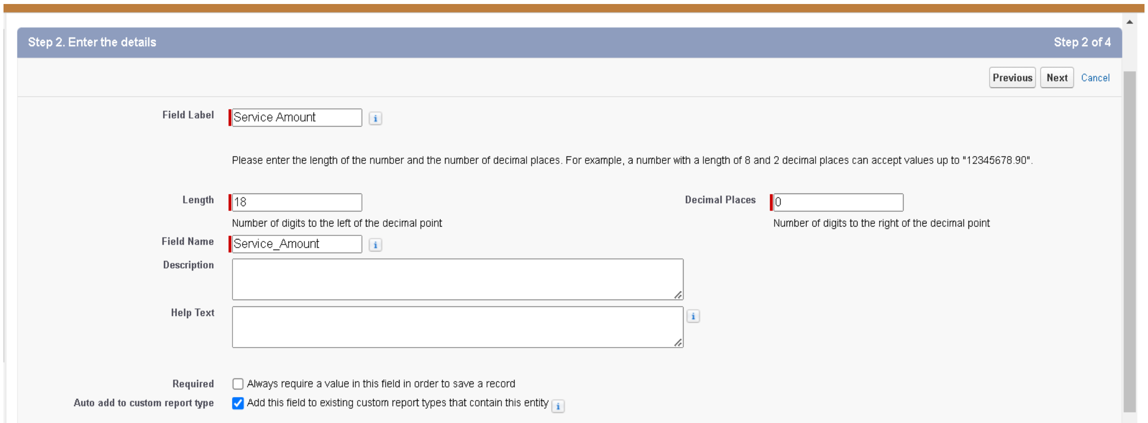
4.Give the Field Label : Maintenance service
5.Field Name : is auto populated
6.Default value : unchecked



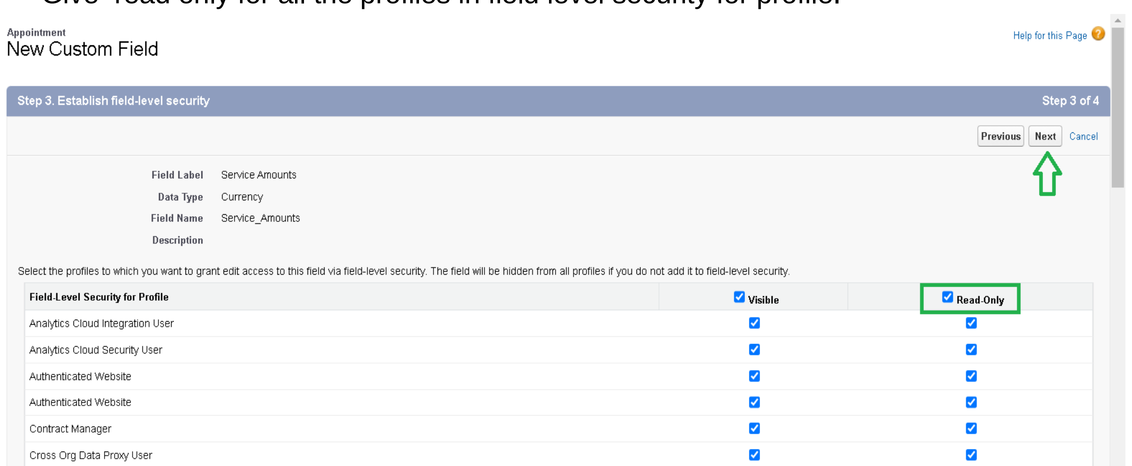
7. Click on next >> next >> save.

Activity 4:Creation Of Date 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 “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.



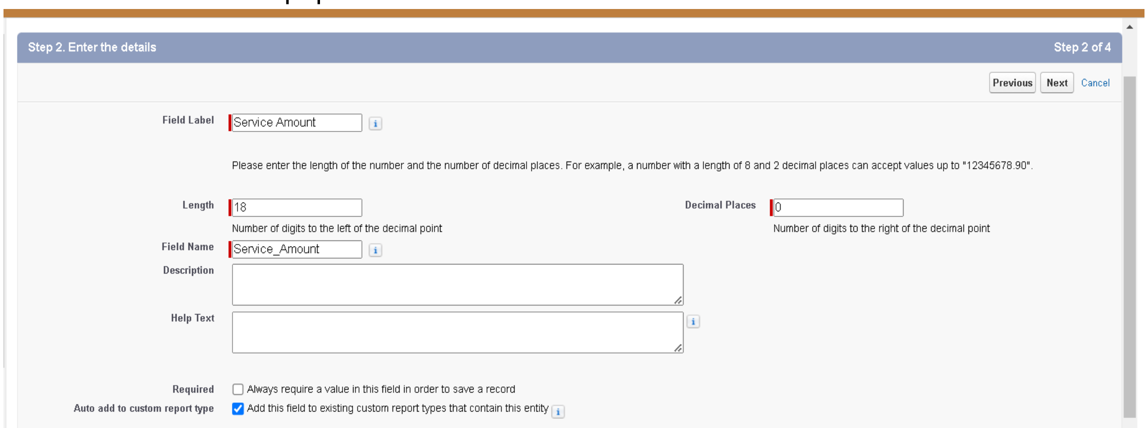
8. Click on next > > save.

Creation of Currency Field on Billing details and feedback Object :

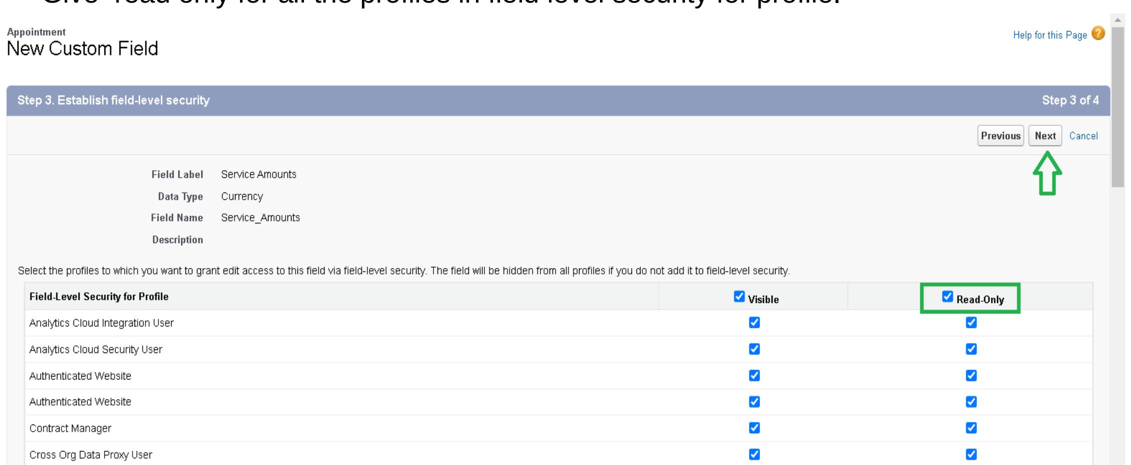
1. Follow the same steps as mentioned above in Billing details and feedback Object.
2. Change the label name as mentioned.
3. Give the Field Label : Payment Paid
4. Field Name : is auto populated

Activity 5:Creation Of Currency 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 “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.



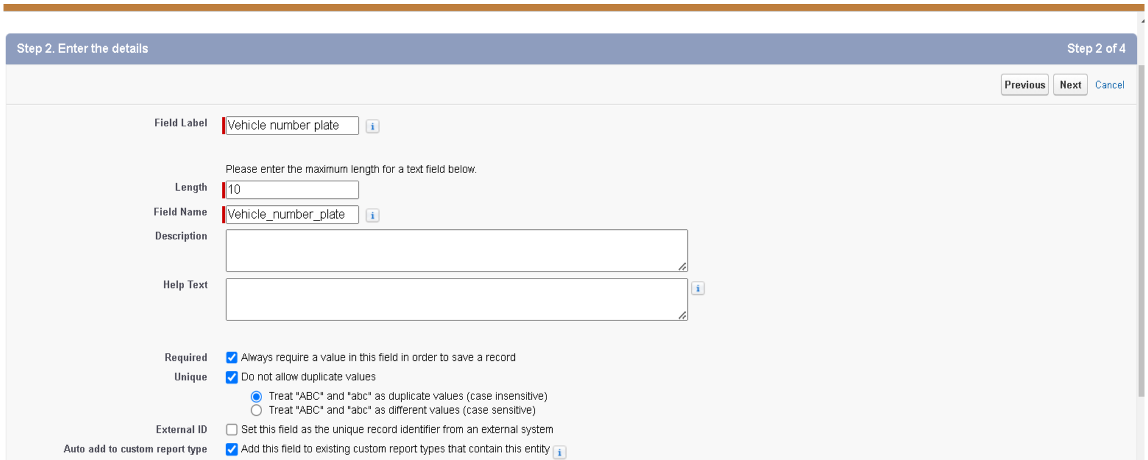
8. Click on next > > save.

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 Name : is auto populated

Activity 6: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.



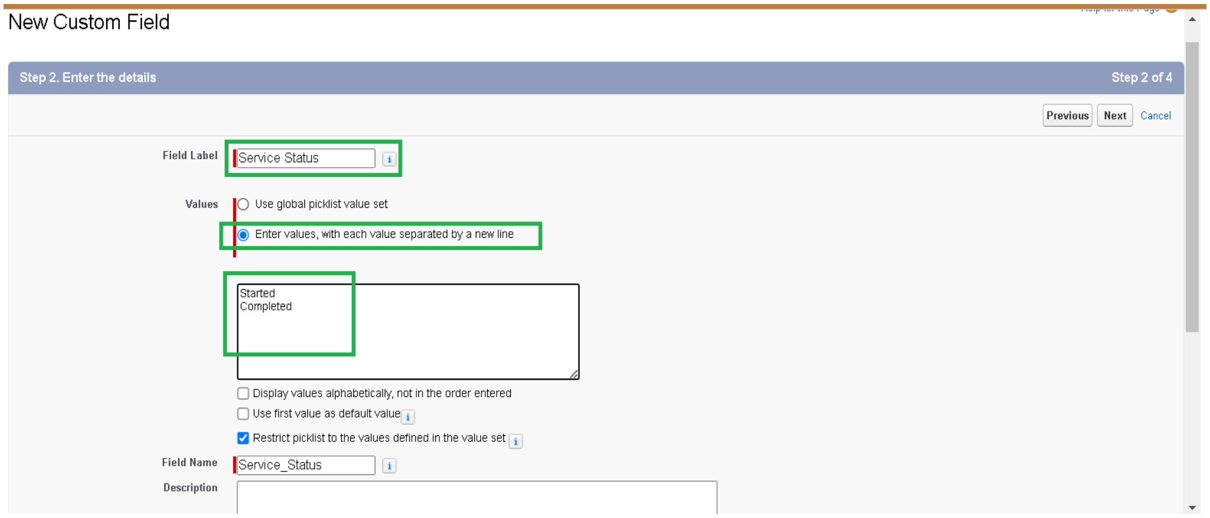
8.Click on next >> next >> save.

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.
8. Click on next >> next >> save

Activity 7:Creation Of Picklist Fields

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.



6. Click Next.
7. Next >> Next >> Save.

Creation of Picklist Fields in Billing details and feedback object :

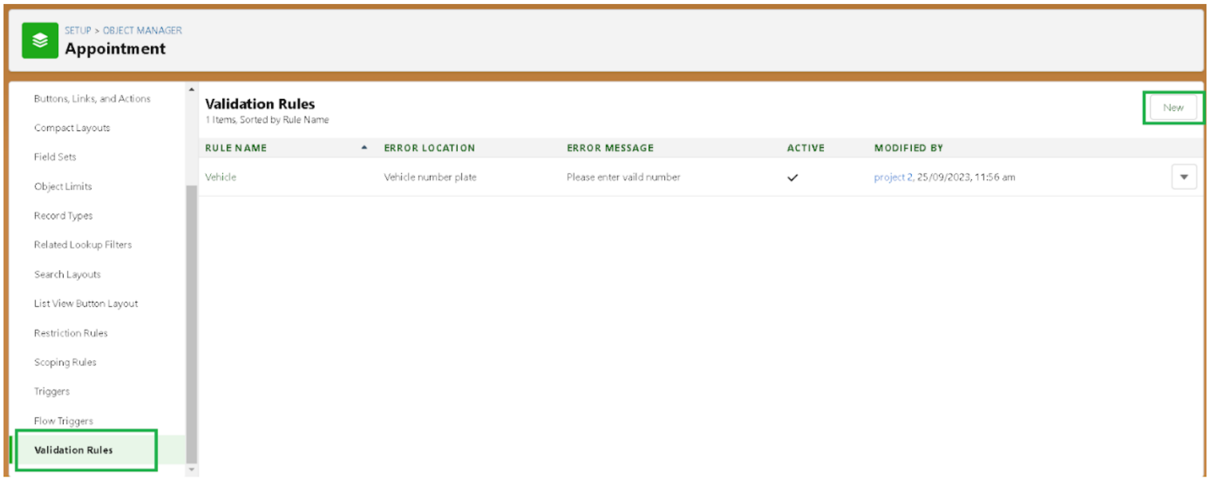
1. Go to setup >> click on Object Manager >> type object name(Billing details and feedback) in search bar >> click on the object.
2. Click on fields & relationship >> click on New.
3. Select Data type as “Picklist” and click Next.
4. Enter Field Label as “Payment Status”, under values select “Enter values, 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.

Milestone 6-Validation Rule

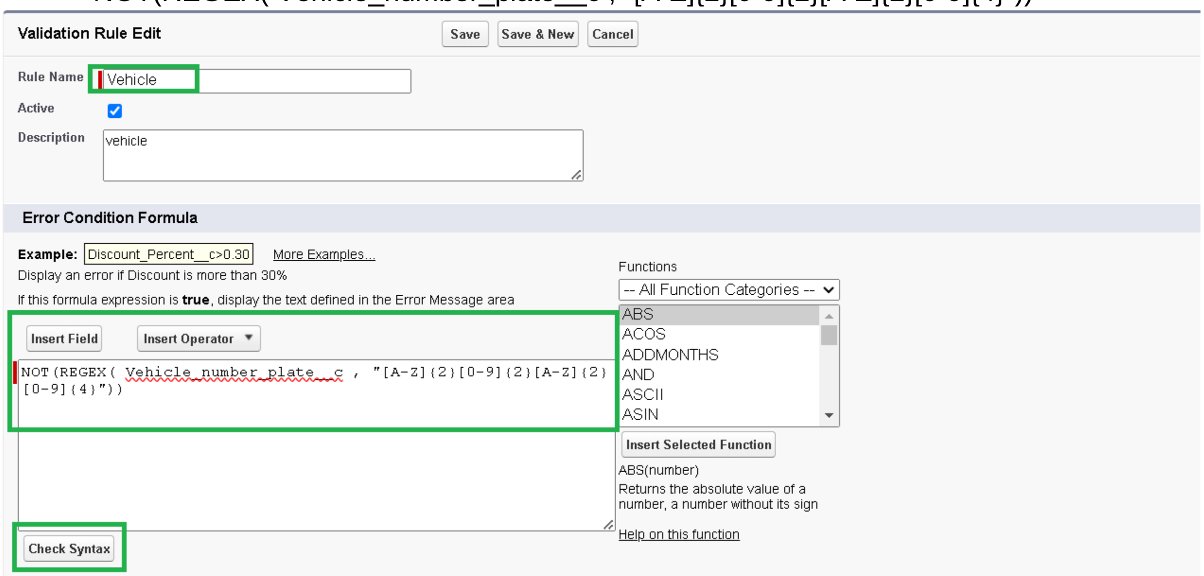
Validation rules are applied when a user tries to save a record and are used to check if the data meets specified criteria. If the criteria are not met, the validation rule triggers an error message and prevents the user from saving the record until the issues are resolved.

Activity 1:To Create A Validation Rule To An Appointment Object

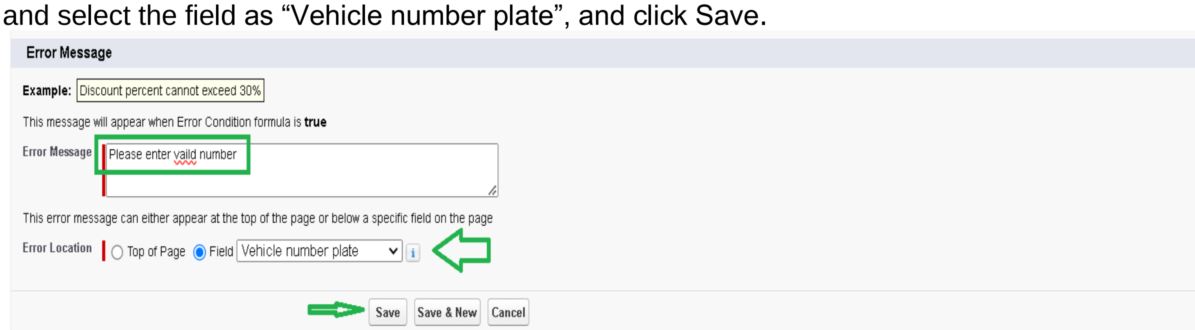
1. Go to the setup page >> click on object manager >> From drop down click edit for Appointment object.
2. Click on the validation rule >> click New.



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}"))



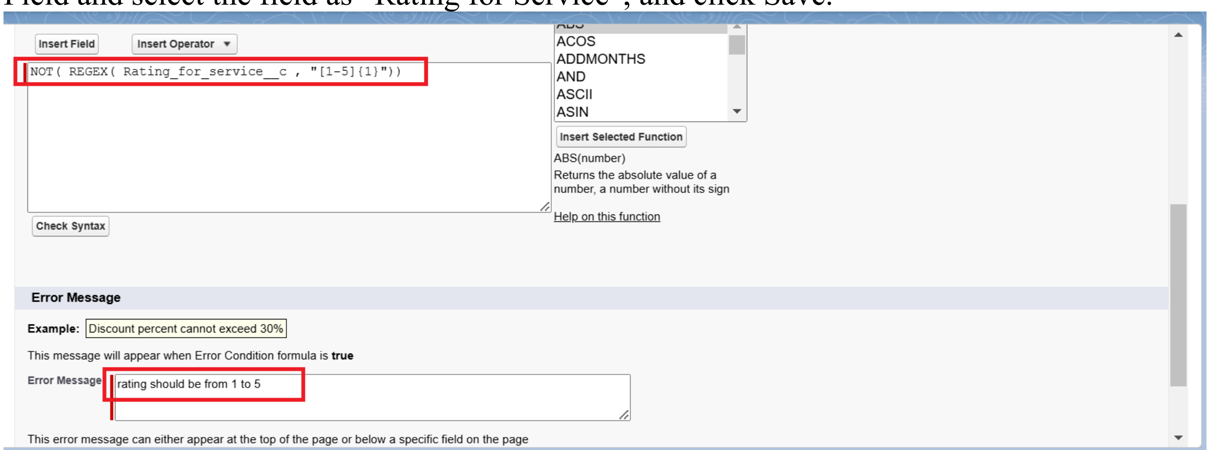
5. Enter the Error Message as “Please enter vaild number ”, select the Error location as Field and select the field as “Vehicle number plate”, and click Save.



Activity 2:To Create A Validation Rule To An Billing Details And Feedback Object

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.



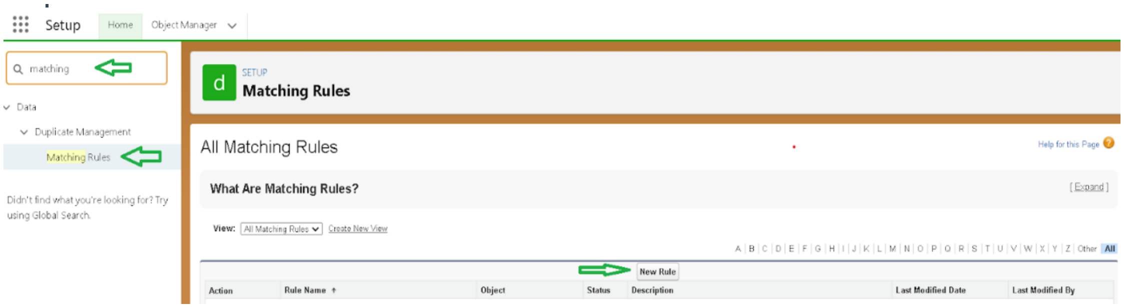
Milestone 7-Duplicate Rule

Duplicate rules are applied when a user tries to save a record and are used to check if the data meets specified criteria. If the criteria are not met, the validation rule triggers an error message and prevents the user from saving the record until the issues are resolved.

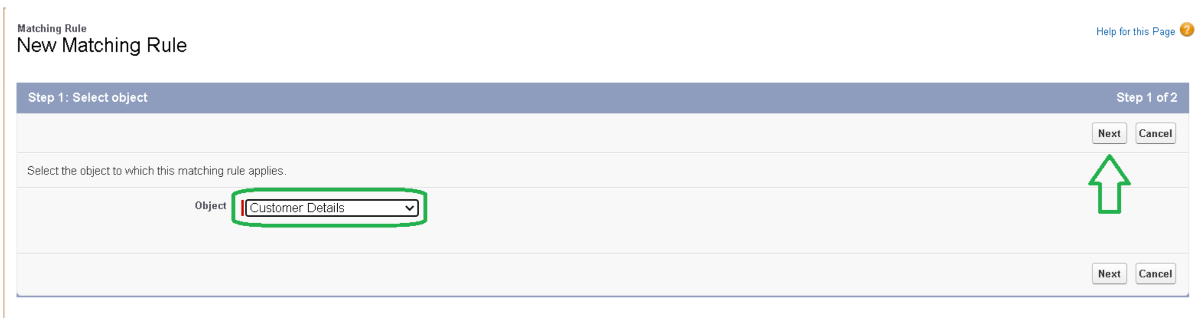
Activity 1:To Create A Matching Rule To An Customer Details

1. Go to quick find box in setup and search for matching Rule.
2. Click on matching rule >> click on New Rule.

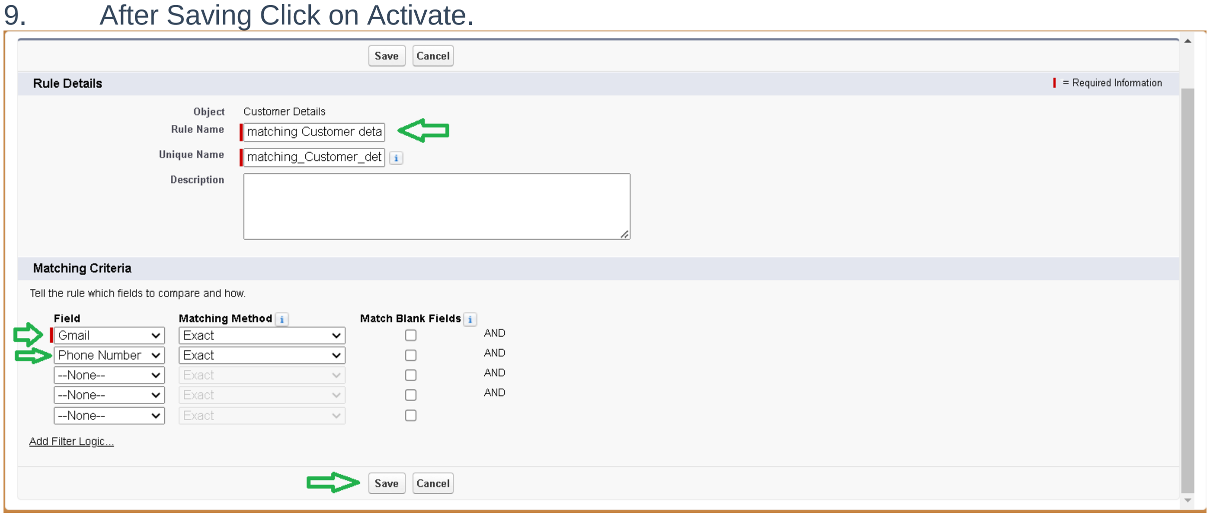
.

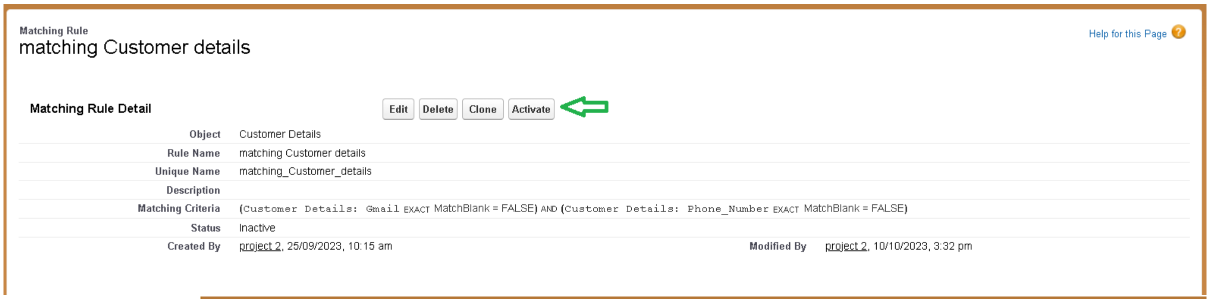


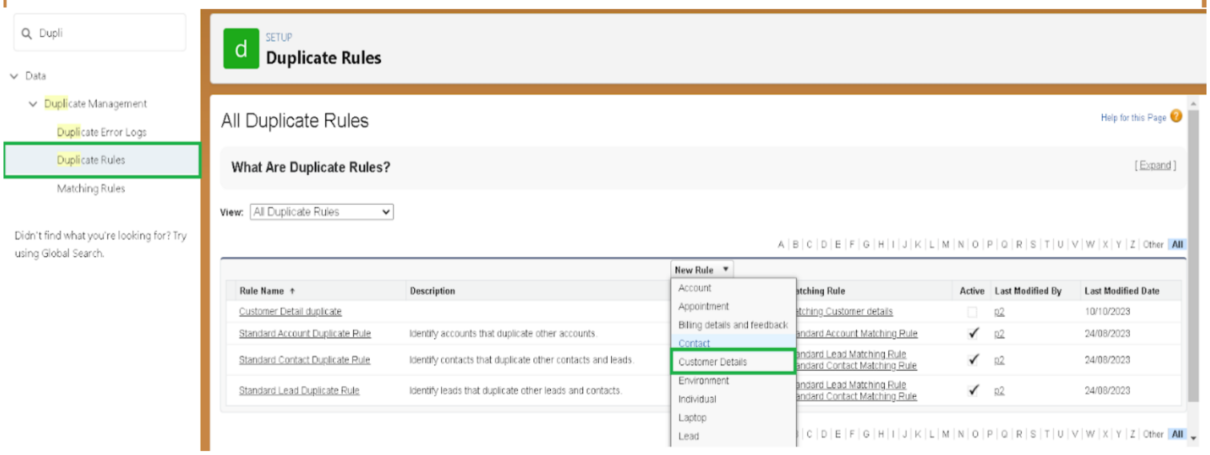
3. Select the object as Customer details and click Next.



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.



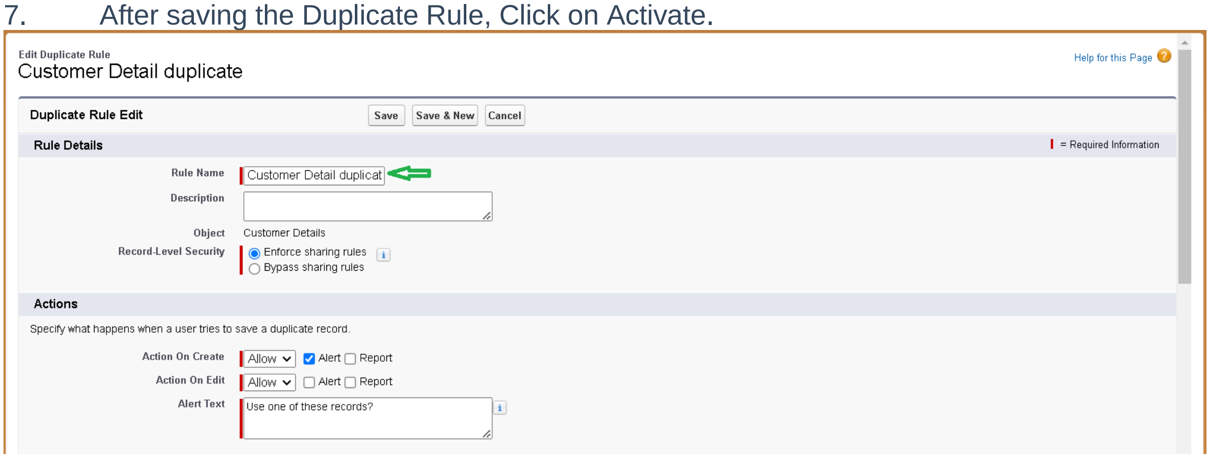


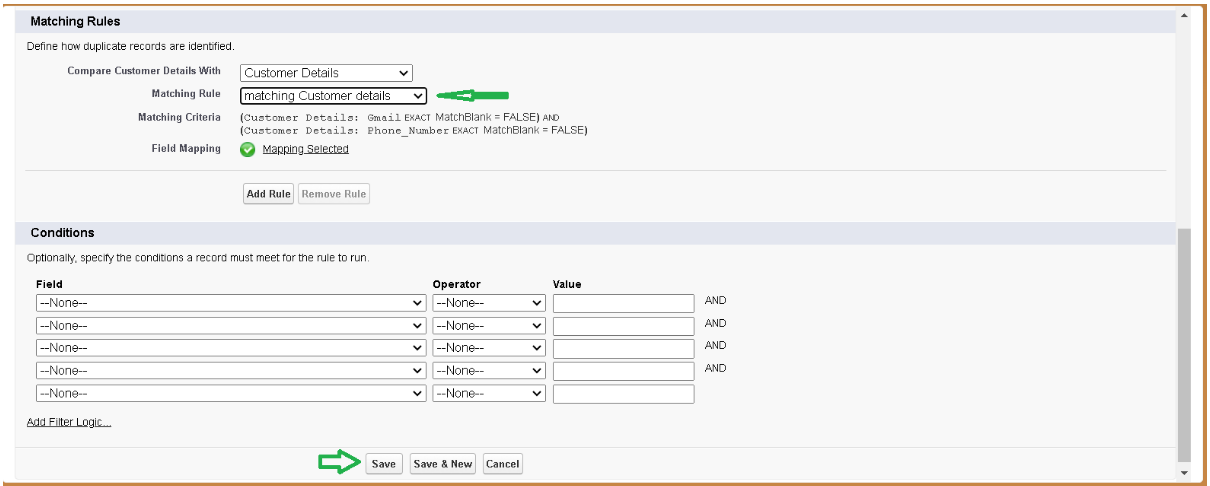


Activity2-To Create A Duplicate Rule To An Customer Details Object

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.





Milestone 8-Profiles

Profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls "Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

Types of profiles in salesforce

1.Standard profiles:

By default salesforce provides below standard profiles.

- Contract Manager
- Read Only
- Marketing User
- Solutions Manager
- Standard User
- System Administrator.

We cannot deleted standard ones

Each of these standard ones includes a default set of permissions for all of the standard objects available on the platform.

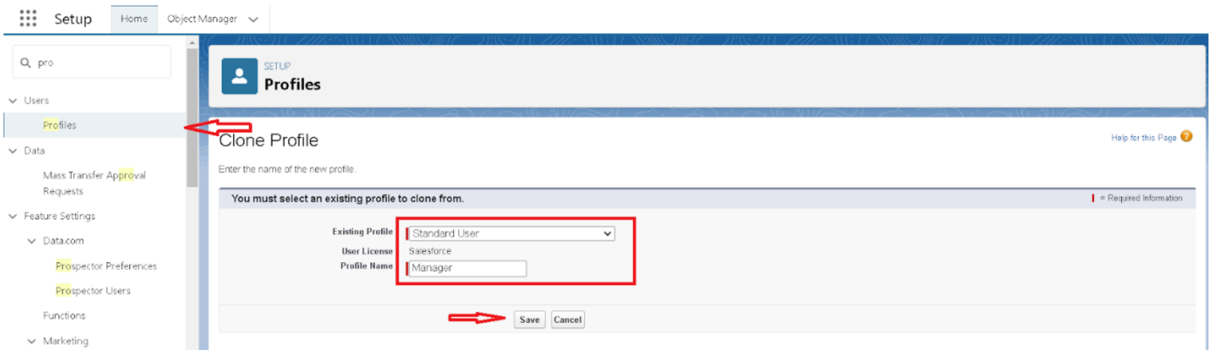
2.**Custom Profiles:**

Custom ones defined by us.

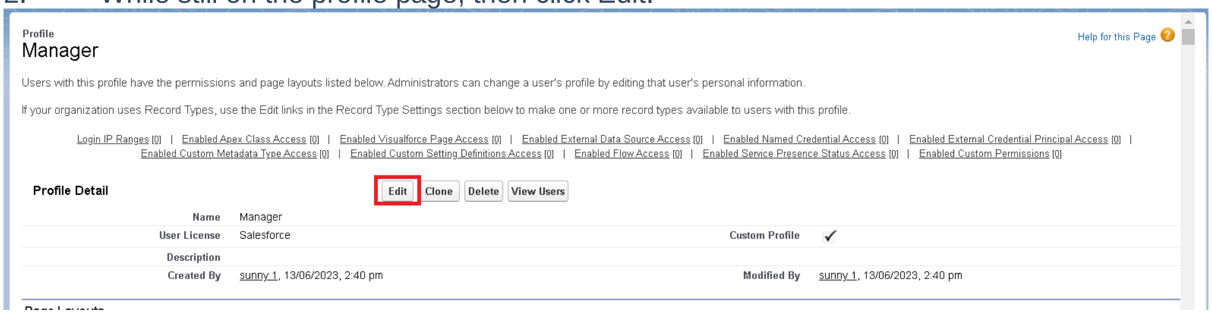
They can be deleted if there are no users assigned with that particular one.

Activity 1-Manger Profile

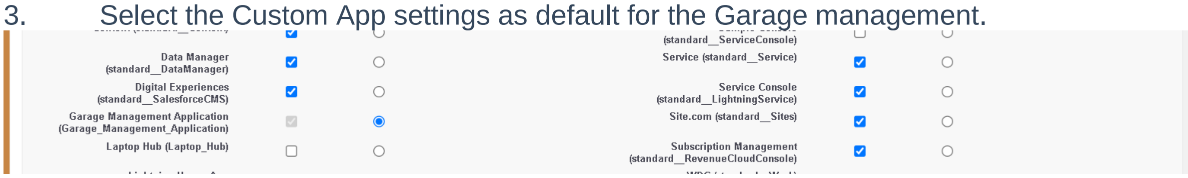
1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (Manager) >> Save.



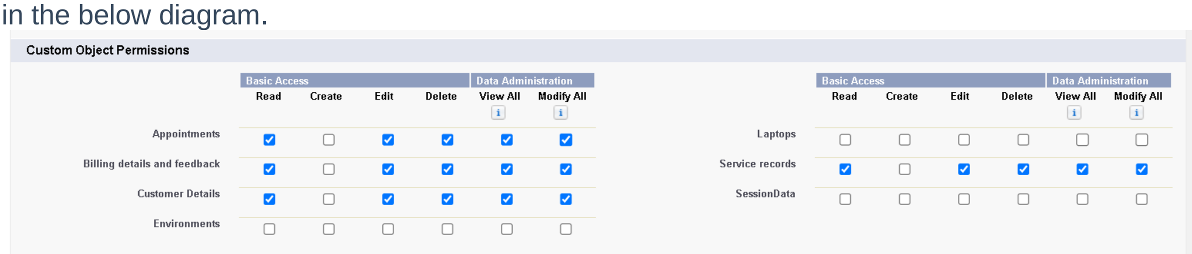
2. While still on the profile page, then click Edit.



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



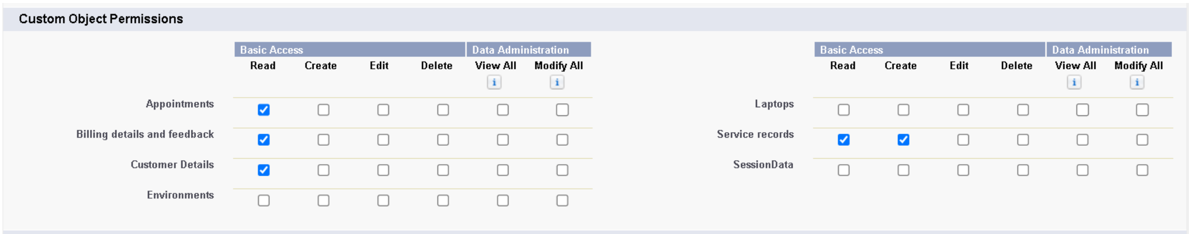
4. Scroll down to Custom Object Permissions and Give access permissions for Appointments,Billing details and feedback , service records and customer details objects as mentioned in the below diagram.



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

Activity 2-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: Read	Create	Edit	Delete	Data Administration: View All	Modify All
Appointments	✓					
Billing details and feedback	✓					
Customer Details	✓					
Environments						
Laptops						
Service records	✓	✓				
SessionData						

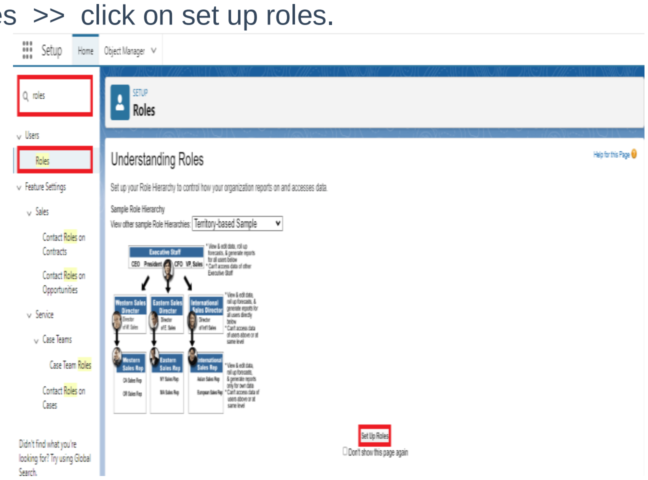
5. And click save.

Milestone 9-Role & Role Hierarchy

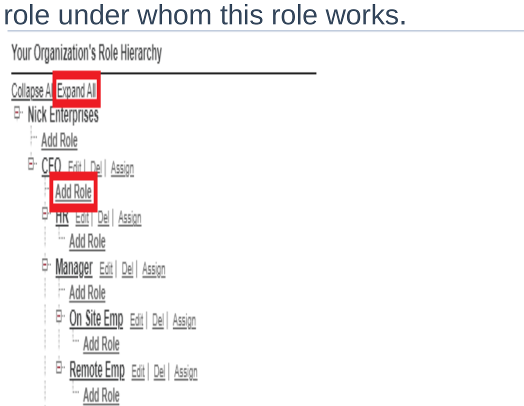
A role in Salesforce defines a user's visibility access at the record level. Roles may be used to specify the types of access that people in your Salesforce organization can have to data. Simply put, it describes what a user could see within the Salesforce organization.

Activity1-Creating Manager Role

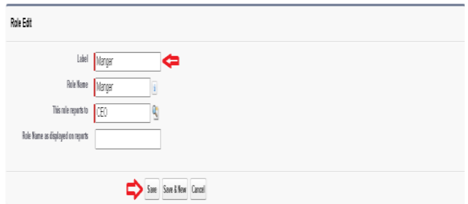
1.Go to quick find >> Search for Roles >> click on set up roles.



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

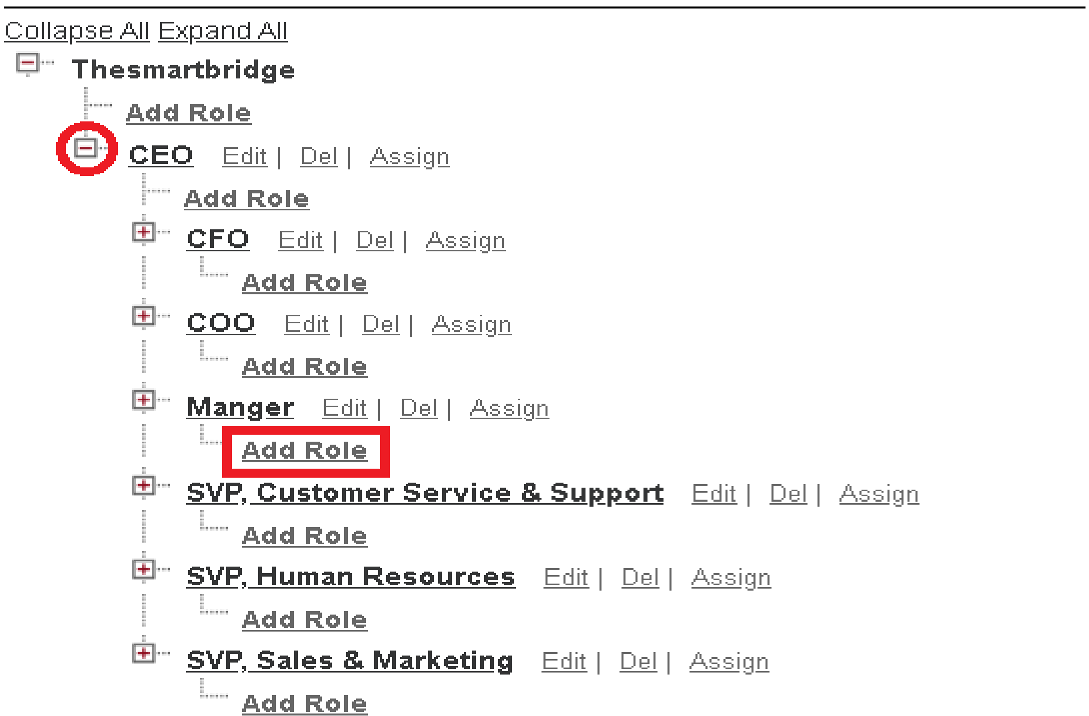


3. Give Label as “Manager” and Role name gets auto populated. Then click on Save.



Activity2-Creating Another Roles

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.

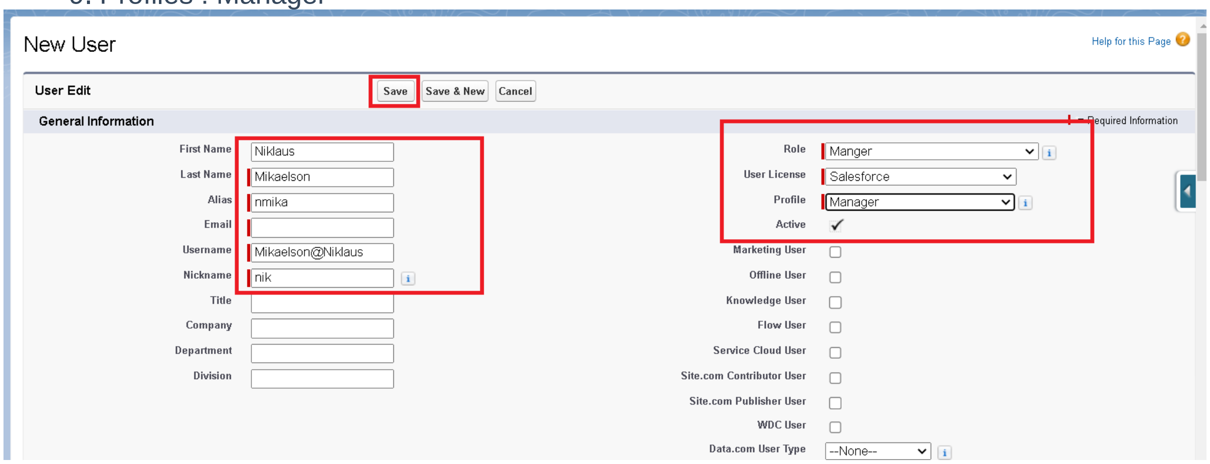
Milestone 10-Users

A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in

Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

Activity1-Create Users

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



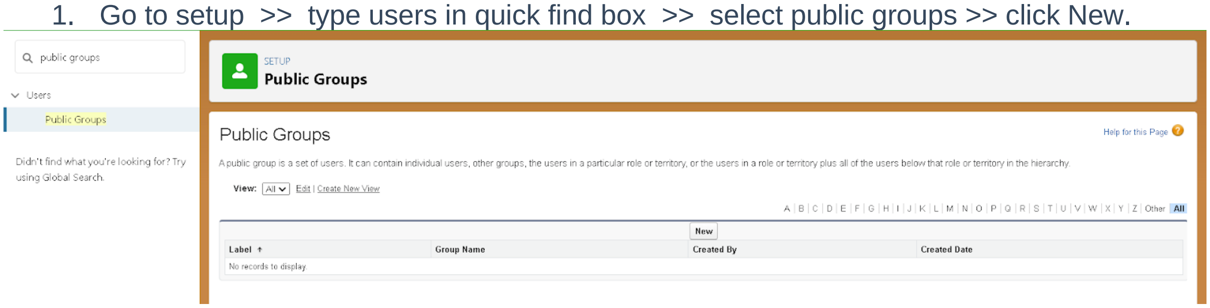
3. Save.

Milestone 11-Public Groups

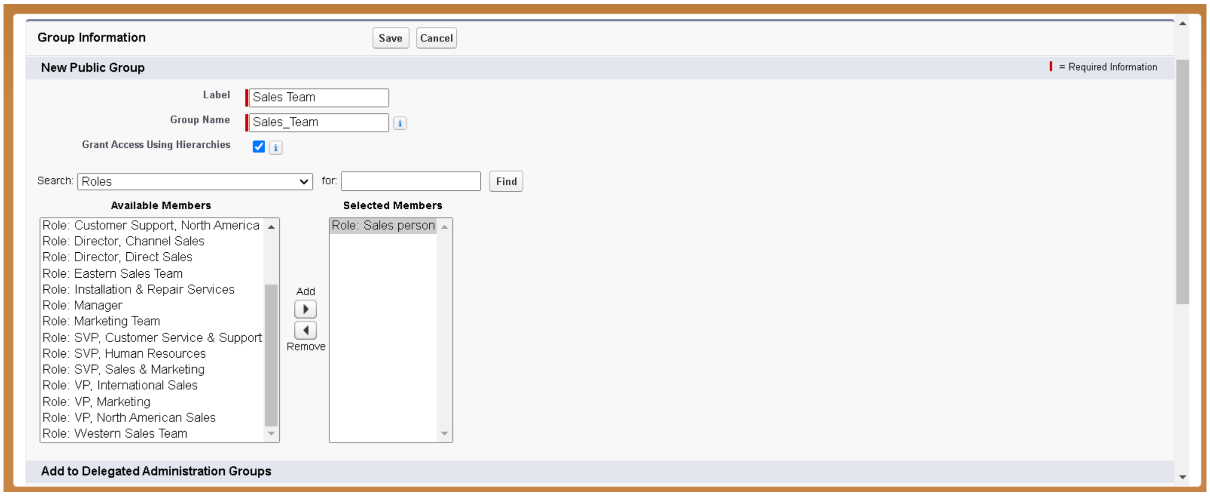
Public groups are a valuable tool for Salesforce administrators and developers to streamline user management, data access, and security settings. By creating and using public groups effectively, you can maintain a secure and organized Salesforce environment while ensuring that users have appropriate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

Activity1-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.

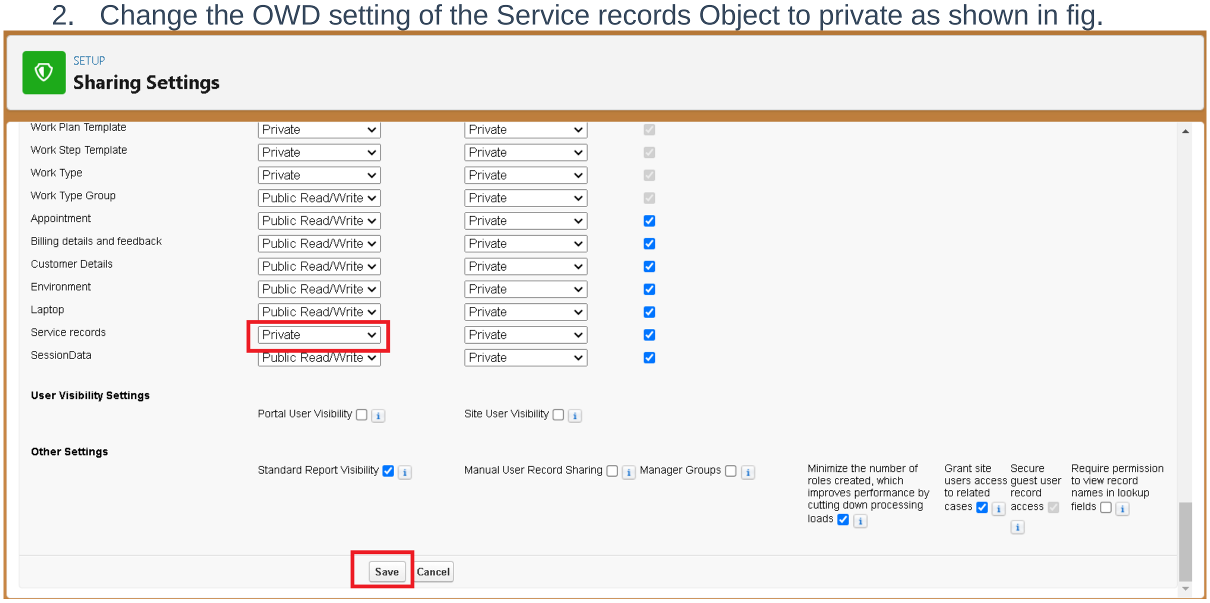


Milestone 12-Sharing Setting

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

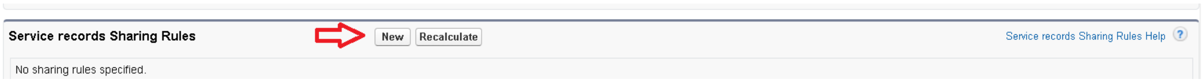
Activity1-Creating Sharing Settings

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 as shown in fig.

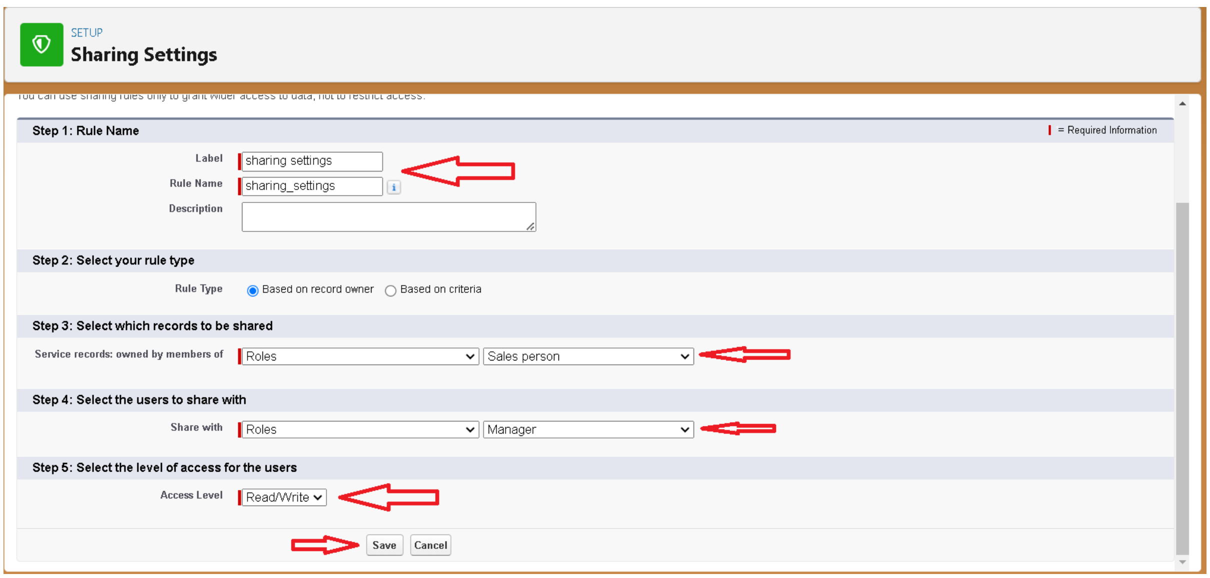


3. Click on save and refresh.

4. Scroll down a bit, Click new on Service records sharing Rules.
5.



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



Milestone 15-Reports

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

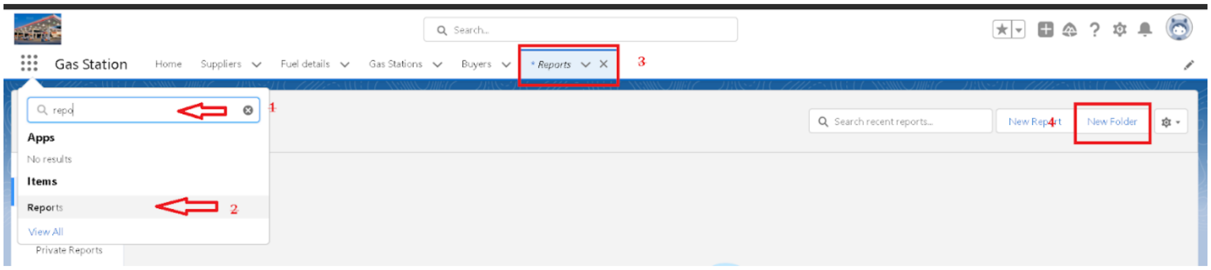
Types of Reports in Salesforce

1. Tabular
2. Summary
3. Matrix
4. Joined Reports

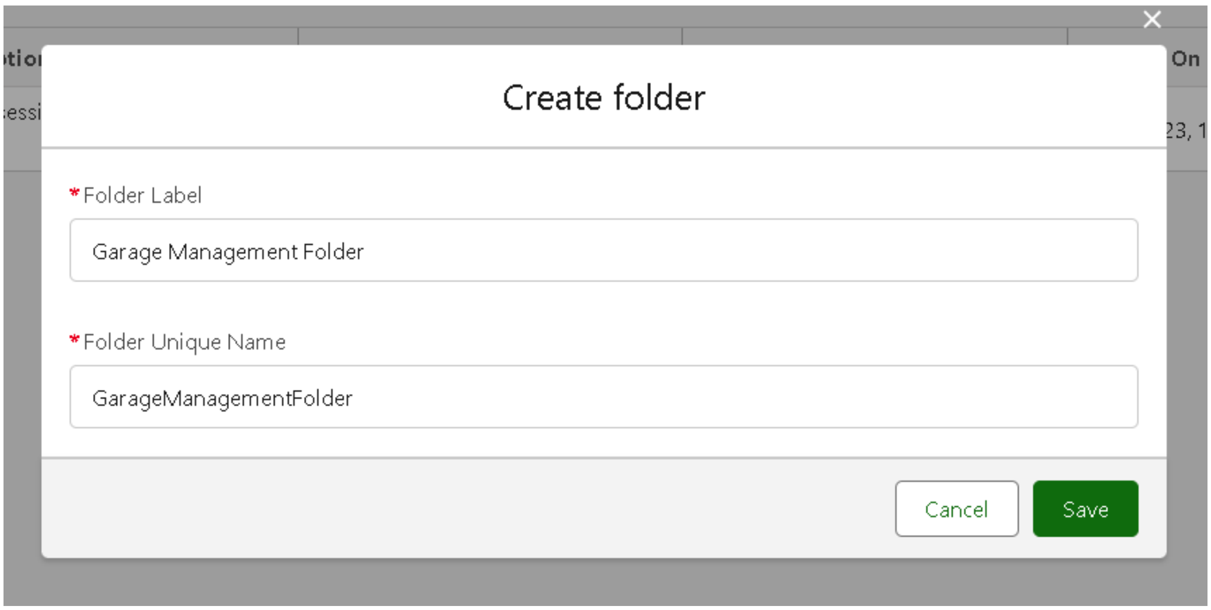
Activity1-Create A Report Folder

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.

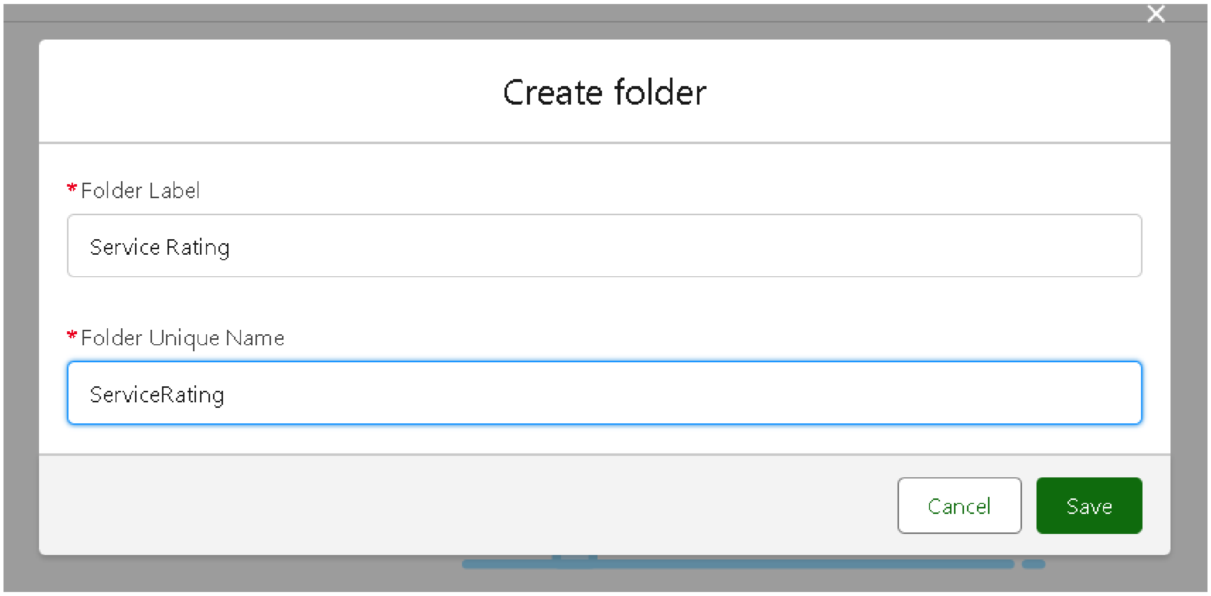


Milestone 16-Dashboards

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you’ve gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

Activity1-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.



6. Follow the same steps, from Reports Milestone and Activity 2, and provide the sharing settings for the folder that was just created.

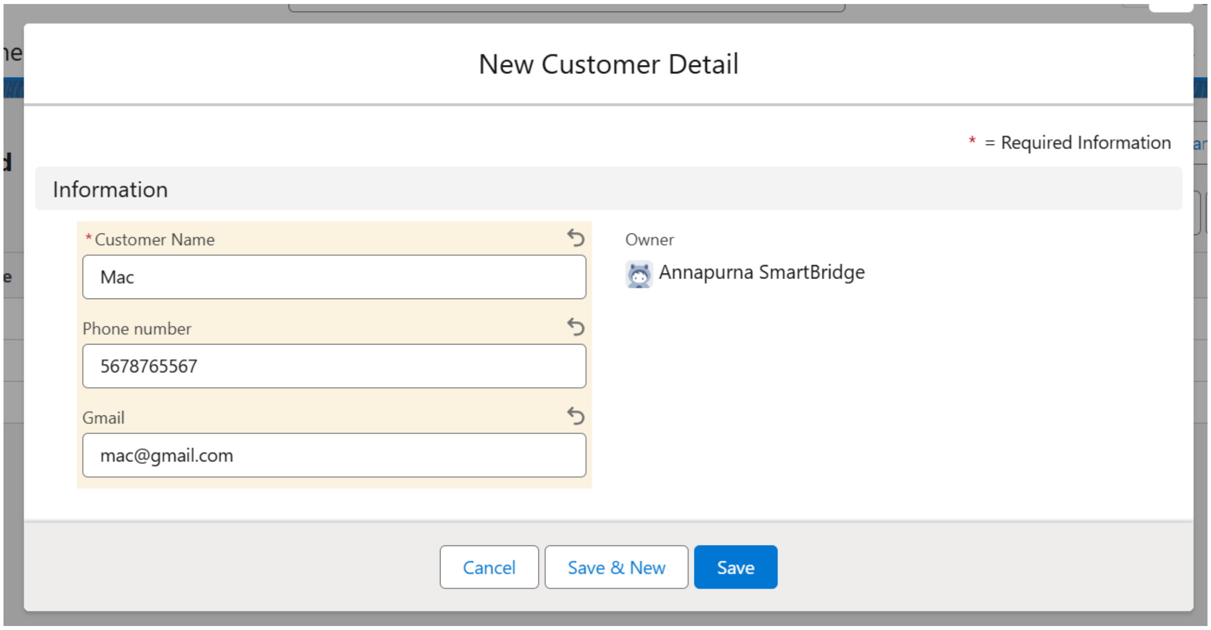
Milestone 17-User Adoption

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

Activity1-Creating Records

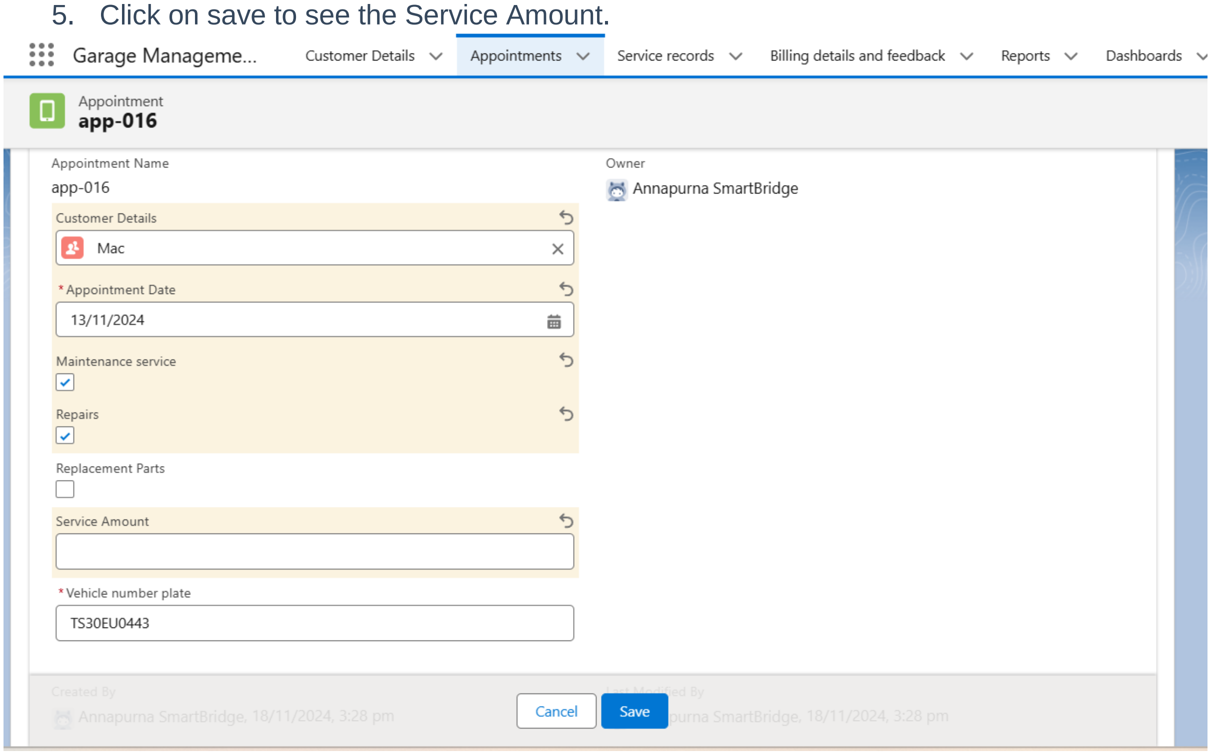
To create a record in the follow objects follow these steps

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



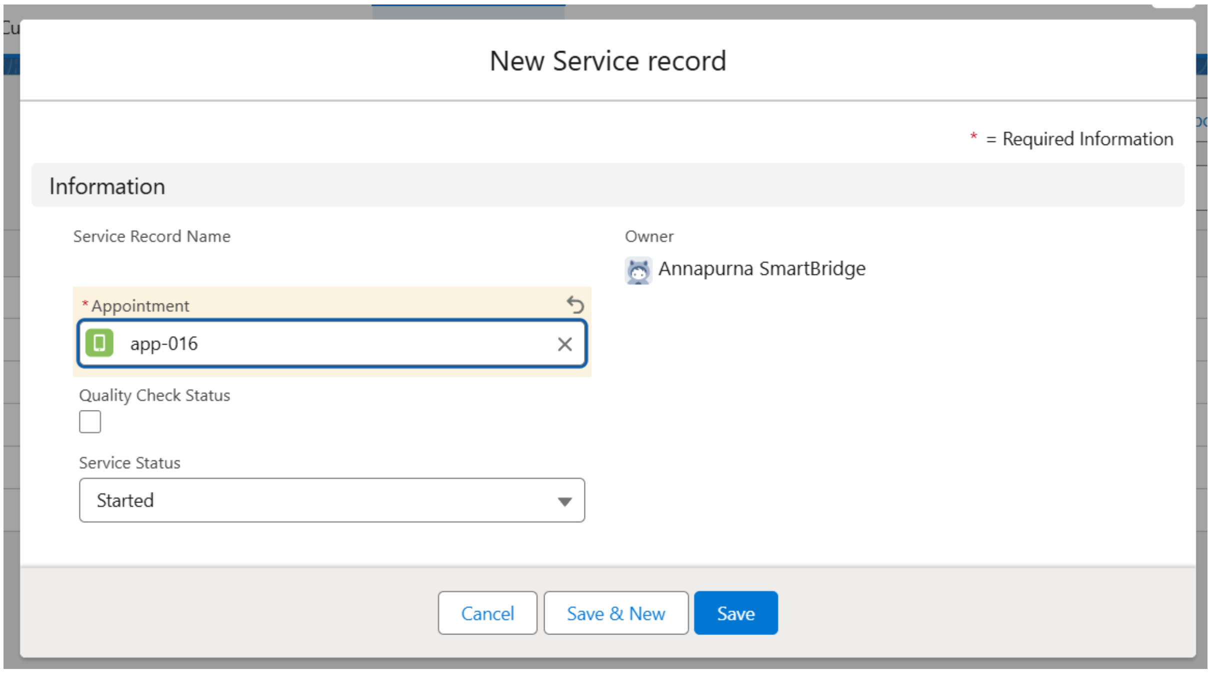
Now, Create the Appointment Record

1. Click on the “**Appointment** tab”.
2. Enter the customer details as created, while entering Appointment Date enter the date less than the created date.
3. Match the validation while entering the vehicle number plate.
4. Select the services you need.
5. Click on save to see the Service Amount.

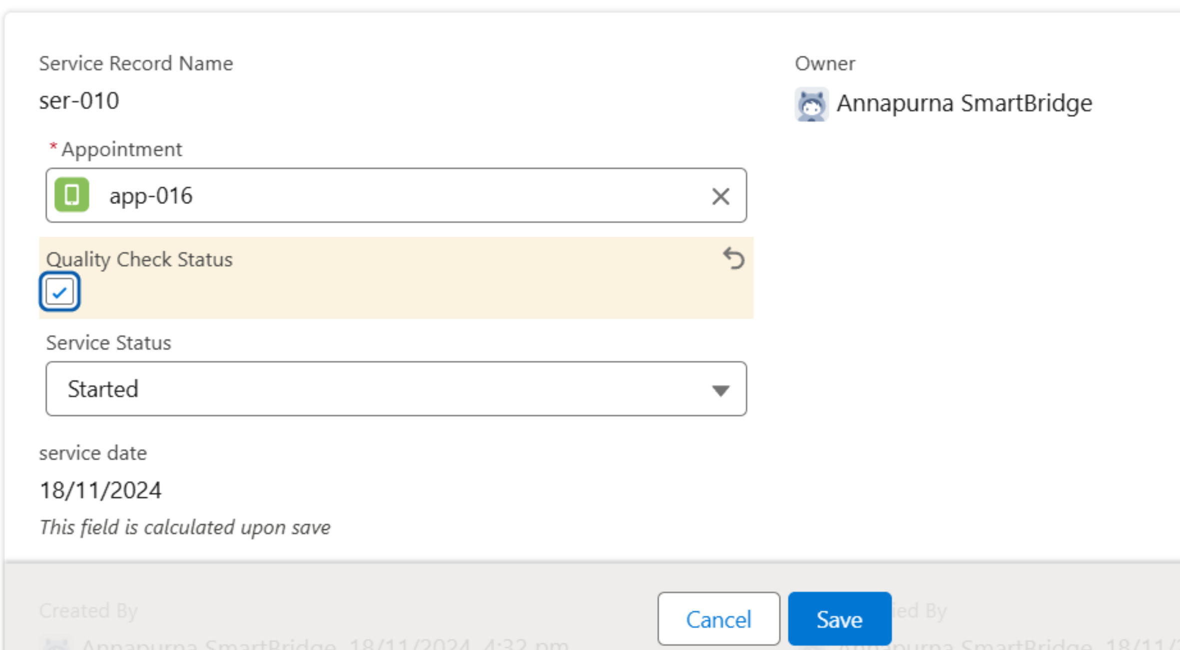


Now, Create a service Record

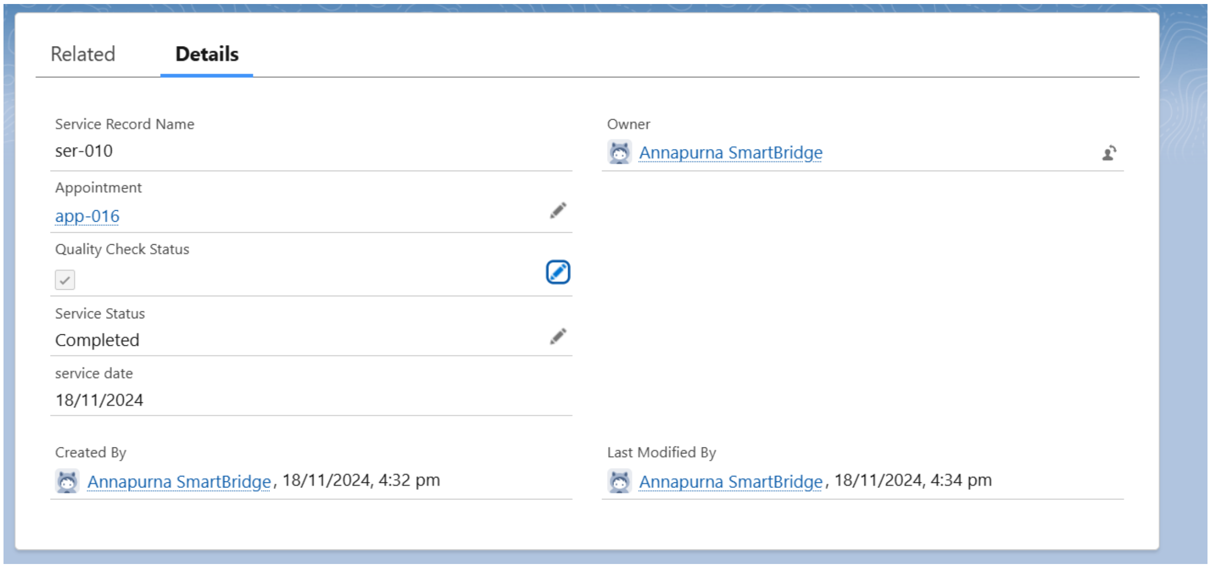
1. Click on the “**Service record** tab”.
2. Enter the Appointment, and started is selected as default.
3. Click on save.



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



6. Now automatically Service status will be moved to completed.


Related
Details
Service Record Name
ser-010
Owner
Annapurna SmartBridge
Appointment
app-016
Quality Check Status
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