GARAGE MANAGEMENT SYSTEM

Creating a Developer Org in Salesforce

To start with the Project Ready Program, we first need to create a developer org in Salesforce. Visit Salesforce Developer Signup and fill in the required details: your first and last name, email, role as Developer, company (your college name), country (India), postal code, and a username. The username should be a combination of your name and company in the format

Creating a Developer Org in Salesforce (Repeated)

As part of our Project Ready Program, we begin by setting up a Salesforce developer org. Navigate to Salesforce Developer Signup and complete the form with your first and last name, email, role as Developer, company (college name), country (India), postal code, and a username in the format username@organization.com. Finally, click on "Sign Me Up" to complete the registration.

Creating a Custom Object - Customer Details

In this module, we create a custom object named "Customer Details". From the setup page, click on "Object Manager", then "Create", and select "Custom Object". Enter "Customer Details" for both the label and plural label names. For the record name, enter "Customer Name" and set the data type to Text. Ensure to allow reports, track field history, and allow search before saving.

Creating a Custom Object - Appointment

Here, we create a custom object named "Appointment". Go to the setup page, click on "Object Manager", "Create", and then "Custom Object". Label it as "Appointment" and use "Appointments" for the plural label. Set the record name to "Appointment Name" with an Auto Number data type. Use the display format app-{000} and start the numbering at 1. Allow reports, track field history, and allow search, then save.

Creating a Custom Object - Billing Details and Feedback

Next, we create a custom object named "Billing Details and Feedback". From the setup page, go to "Object Manager", click "Create", and choose "Custom Object". Enter "Billing Details and Feedback" for both the label and plural label. Set the record name to "Billing Details and Feedback Name" with an Auto Number data type. The display format should be bill-{000} starting at 1. Allow reports, track field history, and allow search, then save.

Creating Tabs for Custom Objects

In this module, we create a tab for the "Customer Details" object. Go to the setup page and type "Tabs" in the Quick Find bar. Click on "Tabs", then "New" under the custom object tab. Select "Customer Details", choose a tab style, and proceed to the next steps, keeping default settings for profiles and custom app inclusion. Ensure the option to append the tab to users' existing

Creating Tabs for Remaining Objects

Now, create tabs for the remaining objects: "Appointments", "Service Records", and "Billing Details and Feedback". Follow the same steps outlined in Module 7, ensuring each object has its corresponding tab created.

Creating a Lightning App - Garage Management Application

Finally, we create a Lightning App called "Garage Management Application". Go to the setup page, search for "App Manager" in the Quick Find bar, and select it. Click on "New Lightning App" and fill in the app name. Proceed through the app options and utility items pages, keeping default settings. Add navigation items such as Customer Details, Appointments, Service Records, Billing Details and Feedback, Reports, and Dashboards. Finally, assign the System Administrator profile to the app, then save and finish.

Feel free to upload screenshots corresponding to each module to create a comprehensive document.

Creating a Lookup Field on Appointment Object

To create a lookup field on the Appointment object, go to the setup page and click on "Object Manager". Search for the object name "Appointment" and click on it. Navigate to "Fields & Relationships" and click "New". Select "Lookup Relationship" as the data type and click Next. Choose "Customer Details" as the related object, then click Next, Next, and Save. Ensure that Activity 4 is completed before proceeding.

Creating a Lookup Field on Service Records Object

To create a lookup field on the Service Records object, go to the setup page, click on "Object Manager", and search for "Service Records". Click on the object, then go to "Fields & Relationships" and click "New". Select "Lookup Relationship" as the data type and click Next. Choose "Appointment" as the related object and click Next. Make it a required field by selecting the Required option. Scroll down to Lookup Filter, click "Show Filter Settings", and add the filter criteria: Field: Appointment: Appointment Date, Operator: less than, select field: Appointment: Created Date. Set the filter type to Required and provide an error message: "Value does not match the criteria". Enable the filter by clicking Active, then click Next, Next, and Save.

Creating a Lookup Field on Billing Details and Feedback Object

To create a lookup field on the Billing Details and Feedback object, go to the setup page, click on "Object Manager", and search for "Billing Details and Feedback". Click on the object, then go to "Fields & Relationships" and click "New". Select "Lookup Relationship" as the data type and click Next. Choose "Service Records" as the related object and click Next, Next, and Save.

Creating a Checkbox Field on Appointment Object

To create a checkbox field on the Appointment object, go to the setup page, click on "Object Manager", and search for "Appointment". Click on the object, then go to "Fields & Relationships" and click "New". Select "Checkbox" as the data type and click Next. Give the Field Label as "Maintenance Service" and keep the auto-populated field name. Set the default value to unchecked and click Next, Next, and Save.

Creating Another Checkbox Field on Appointment Object

Repeat the steps from above to create another checkbox field. This time, give the Field Label as "Repairs", keep the auto-populated field name, set the default value to unchecked, and click Next, Next, and Save.

Creation of Date Field on Appointment Object

To create a date field on the Appointment object, go to the setup page, click on "Object Manager", and search for "Appointment". Click on the object, then go to "Fields & Relationships" and click "New". Select "Date" as the data type and click Next. Give the Field Label as "Appointment Date" and keep the auto-populated field name. Make it a required field by clicking on the Required option. Click Next, Next, and Save.

Creation of Currency Fields

Creating a Currency Field on Appointment Object

To create a currency field on the Appointment object, go to the setup page, click on "Object Manager", and search for "Appointment". Click on the object, then go to "Fields & Relationships" and click "New". Select "Currency" as the data type and click Next. Give the Field Label as "Service Amount" and keep the auto-populated field name. Set it to read-only for all profiles in field-level security and click Next, Next, and Save.

Creating a Currency Field on Billing Details and Feedback Object

Follow the same steps as above to create a currency field on the Billing Details and Feedback object. Change the label name to "Payment Paid" and keep the auto-populated field name. Click Next, Next, and Save.

Creation of Text Fields

Creating a Text Field on Appointment Object

To create a text field on the Appointment object, go to the setup page, click on "Object Manager", and search for "Appointment". Click on the object, then go to "Fields & Relationships" and click "New". Select "Text" as the data type and click Next. Give the Field Label as "Vehicle Number Plate" and keep the auto-populated field name. Set the length to 10 and make the field required and unique. Click Next, Next, and Save.

Creating a Text Field on Billing Details and Feedback Object

To create a text field on the Billing Details and Feedback object, go to the setup page, click on "Object Manager", and search for "Billing Details and Feedback". Click on the object, then go to "Fields & Relationships" and click "New". Select "Text" as the data type and click Next. Give the Field Label as "Rating for Service" and keep the auto-populated field name. Set the length to 1 and make the field required and unique. Click Next, Next, and Save.

Creation of Picklist Fields

Creating a Picklist Field on Service Records Object

To create a picklist field on the Service Records object, go to the setup page, click on "Object Manager", and search for "Service Records". Click on the object, then go to "Fields & Relationships" and click "New". Select "Picklist" as the data type and click Next. Enter the Field Label as "Service Status" and select "Enter values, with each value separated by a new line". Enter the values "Started" and "Completed". Click Next, Next, and Save.

Creating a Picklist Field on Billing Details and Feedback Object

To create a picklist field on the Billing Details and Feedback object, go to the setup page, click on "Object Manager", and search for "Billing Details and Feedback". Click on the object, then go to "Fields & Relationships" and click "New". Select "Picklist" as the data type and click Next. Enter the Field Label as "Payment Status" and select "Enter values, with each value separated by a new line". Enter the values "Pending" and "Completed". Click Next, Next, and Save.

Creation of Formula Fields

Creating a Formula Field on Service Records Object

To create a formula field on the Service Records object, go to the setup page, click on "Object Manager", and search for "Service Records". Click on the object, then go to "Fields & Relationships" and click "New". Select "Formula" as the data type and click Next. Give the Field Label and Field Name as "Service Date" and select "Date" as the formula return type. Click Next, then insert the formula "CreatedDate". Click "Check Syntax" to validate, then click Next, Next, and Save.

Creating a Checkbox Field on Service Records Object

To create a checkbox field on the Service Records object, go to the setup page, click on "Object Manager", and search for "Service Records". Click on the object, then go to "Fields & Relationships" and click "New". Select "Checkbox" as the data type and click Next. Give the Field Label as "Quality Check Status" and keep the auto-populated field name. Set the default value to unchecked and click Next, Next, and Save.

Feel free to upload screenshots corresponding to each module to create a comprehensive document.

Creating Date Fields

Description: We created date fields on the "Appointment" object to manage the appointment date.

Steps:

1. Go to the setup page.
2. Click on "Object Manager" and search for the "Appointment" object.
3. Click on "Fields & Relationships" and click "New".
4. Select "Date" as the data type and click "Next".
5. Enter the following details:
    - Field Label: Appointment Date
6. Click "Next" and then "Save".

Creating Roll-up Summary Fields

Description: We created roll-up summary fields on the "Billing details and feedback" object to summarize charges.

Steps:

1. Go to the setup page.
2. Click on "Object Manager" and search for the "Billing details and feedback" object.
3. Click on "Fields & Relationships" and click "New".
4. Select "Roll-up Summary" as the data type and click "Next".
5. Enter the following details:
    - Field Label: Total Service Charges
6. Click "Next".
7. Select the related object "Service records".
8. Select the summary type as "SUM" and the field to summarize as "Total Charges".
9. Click "Next" and then "Save".

Creating a Data Validation Rule

Description: We created a data validation rule on the "Appointment" object to ensure that the appointment date is not in the past.

Steps:

1. Go to the setup page.
2. Click on "Object Manager" and search for the "Appointment" object.
3. Click on "Validation Rules" and click "New".
4. Enter the following details:
    - Rule Name: Validate_Appointment_Date
    - Error Condition Formula: Appointment_Date__c < TODAY()
    - Error Message: "Appointment Date cannot be in the past."
5. Click "Save".

Importing Data Using Data Import Wizard

Description: We imported sample data into the "Customer Details" object using the Data Import Wizard.

Steps:

1. Go to the setup page.
2. Type "Data Import Wizard" in the Quick Find bar and select it.

3. Click on "Launch Wizard".
4. Select the "Customer Details" object.
5. Upload the CSV file with sample data.
6. Map the CSV fields to the Salesforce fields.
7. Click "Next" and then "Start Import".

Creating Reports and Dashboards

Description: We created reports and dashboards to analyze the data in our Salesforce org.

Steps:

1. **Creating a Report:**
    - Go to the Reports tab.
    - Click on "New Report".
    - Select the report type (e.g., "Customer Details with Appointments").
    - Add filters, columns, and groupings as needed.
    - Click "Save".
2. **Creating a Dashboard:**
    - Go to the Dashboards tab.
    - Click on "New Dashboard".
    - Add a name and select a folder for the dashboard.
    - Click "Create".
    - Add components to the dashboard (e.g., charts, tables) and link them to the reports created earlier.
    - Click "Save".