GARAGE MANAGEMENT SYSTEM

By

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Project Abstraction

The Garage Management Systemis a web-based tool designedto manage and track all garage operations. The system aims to provide a centralized platform for garage ownersto monitor and control theirbusiness activities,including employee management, inventory tracking, and customer service

The system is built on the Salesforce platform, which providesa robustand secure infrastructure for managing and storing data. The Salesforce platform also offers a wide range of tools and features that can be used tocustomize and extend the system to meet the specific needs of the garagebusiness.

One of the key features of the Garage Management System is its employee management module. This module allows garage owners to keep track of all their employees, including their contact information, workschedules, and job assignments. The system also provides tools for managing employee performance, such as tracking attendance and evaluating performance.

The GarageManagement System also includes a customer servicemodule, which allowsgarage owners to keep track of all their customersand their interactions with the garage.The system providestools for
managing customerinformation, such as contact detailsand service history, as well as tools for scheduling appointments and trackingcustomerfeedback.

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INTRODUCTION

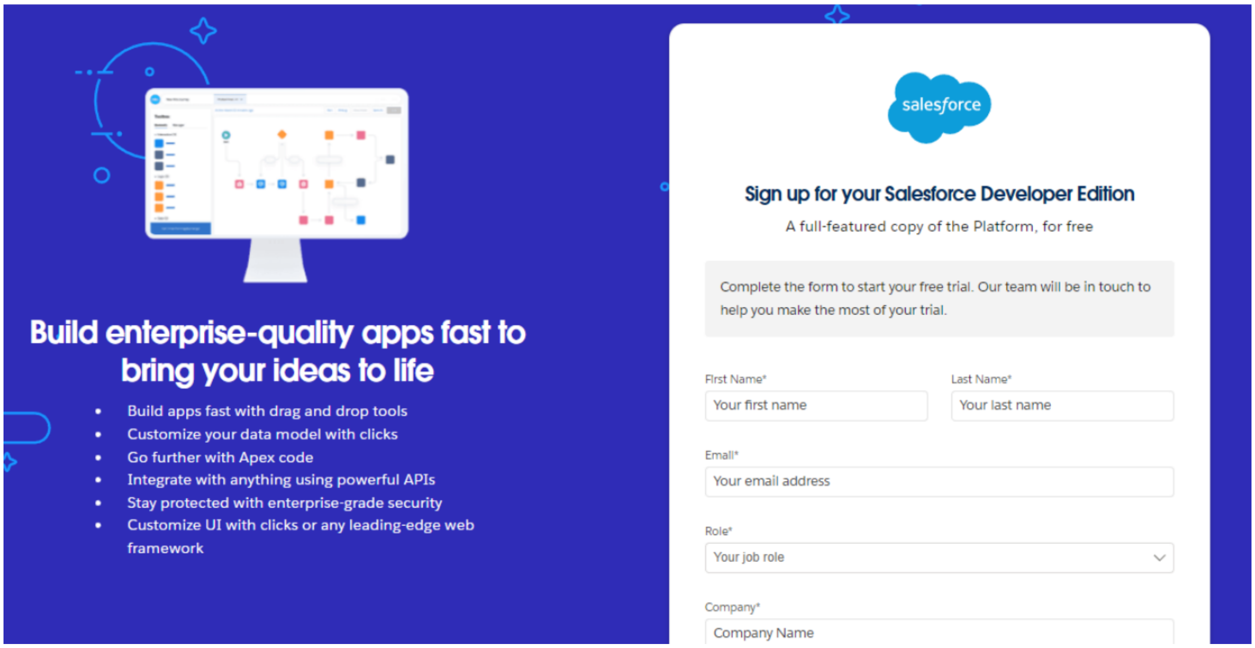
The Garage Management System is a comprehensive solution designed to optimize the usage of vehicles and trailers that carry inventories to stores. The system aims to streamline the management of vehicle records, track vehicles, and ensure efficient inventory transportation. The Garage Management System will be built on the Salesforce platform, leveraging its robust architecture and scalability. The system will consist of several components, including vehicle records, inventory management, workflow automation, and integration with other Salesforce modules. The implementation strategy will involve requirements gathering, design, development, testing, and deployment. The abstraction framework for the system will use an Integration Procedure to get input from a workflow, query the product model based on that input, and update products, attributes, and inventory levels. The Garage Management System will provide a flexible and scalable architecture for managing and optimizing inventory transportation, ensuring efficient vehicle utilization, and automating business processes.

TASK 1:

Creating Developer Account:

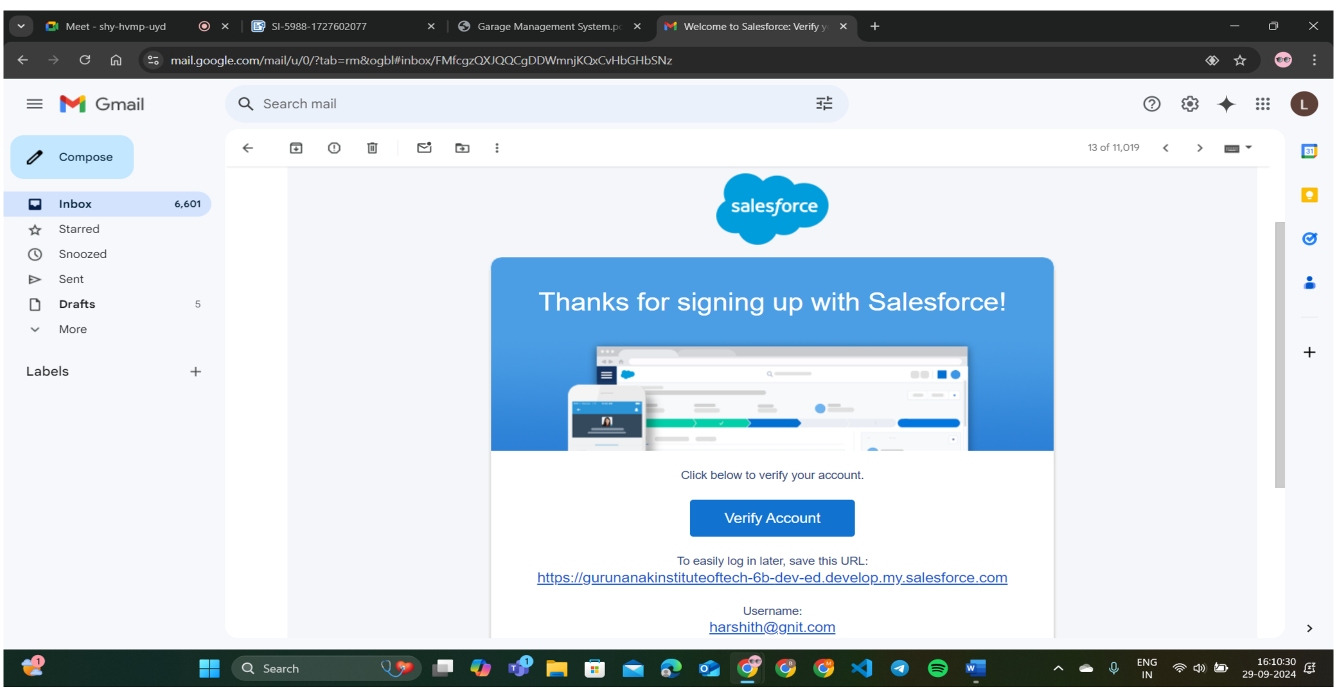
Creating a developer org in salesforce.

1. Go to https://developer.salesforce.com/signup
2. On the sign up form, enterthe following details:
3. First name & Last name: Sai Harshith Lakkarsu
4. Email : lakkarsusaiharshith@gmail.com
5. Role : Developer
6. Company : College Name
7. County : India
8. Postal Code : pin code
9. Username : should be a combination of your name and companyThis need not be an actual emailid, you can give anythingin the format : username@organization.com
10. Click on sign me up after filling these.



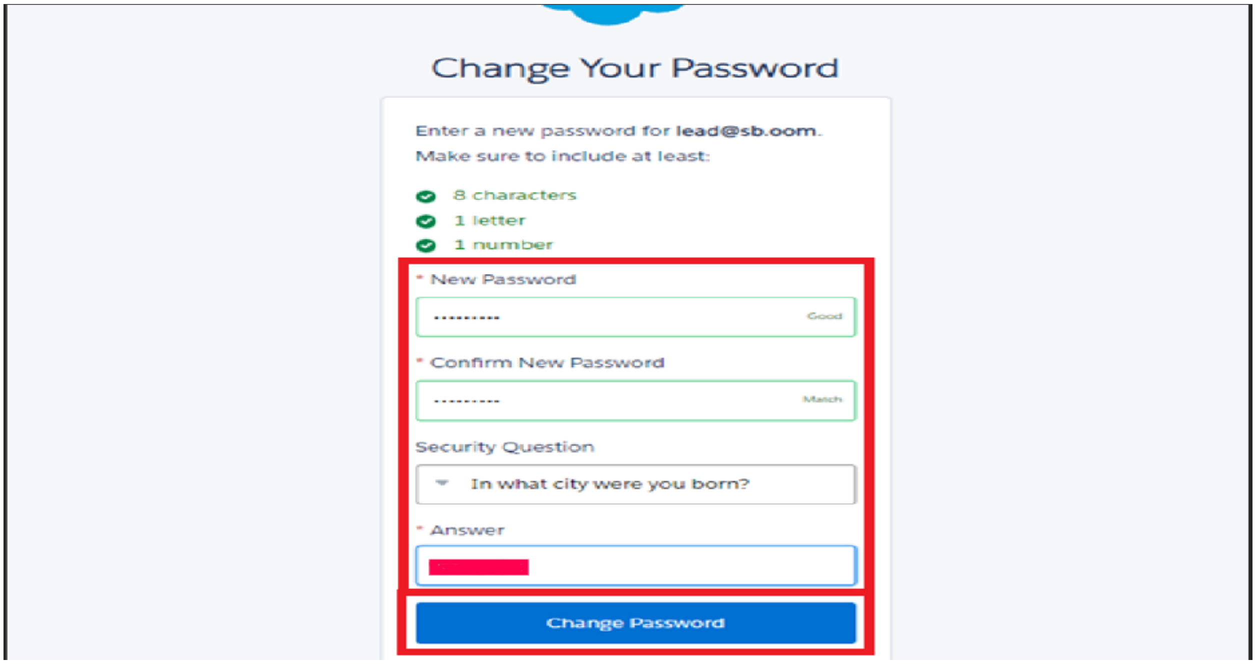
Account Activation

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

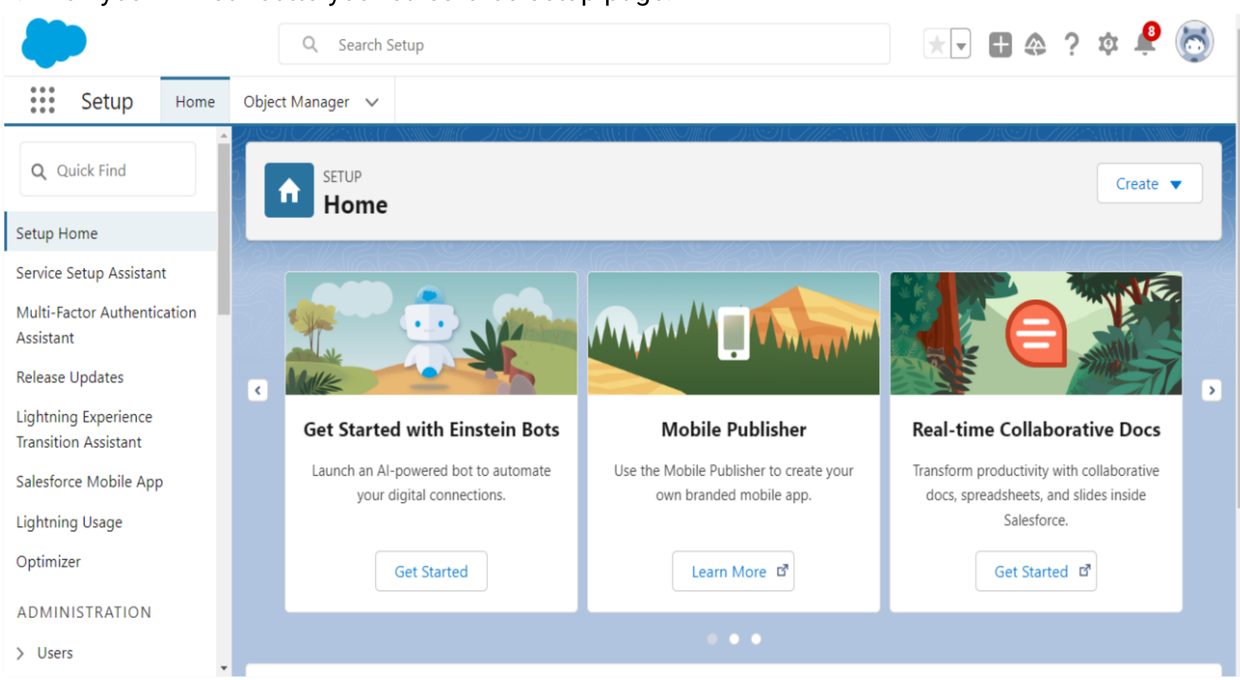


2. Click on Verify Account.

3. Give a password and answera security questionand click on change password.



4. Then you will redirectto your salesforce setup page.



TASK 2:CREATING THE OBJECTS

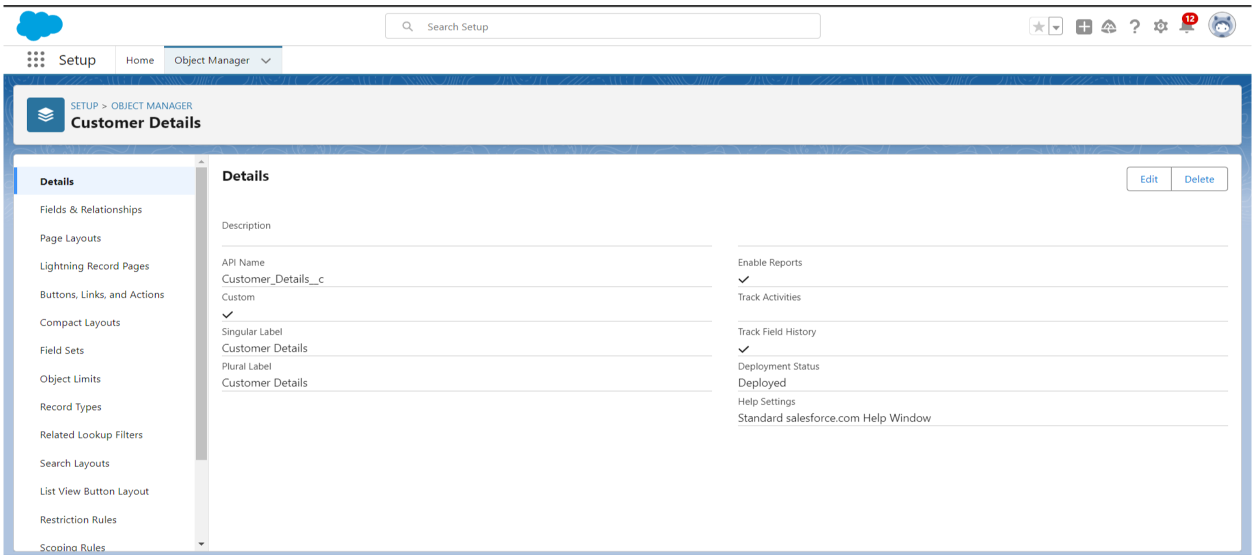
a. Create Customer Details Object

To create an object:

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

Object.

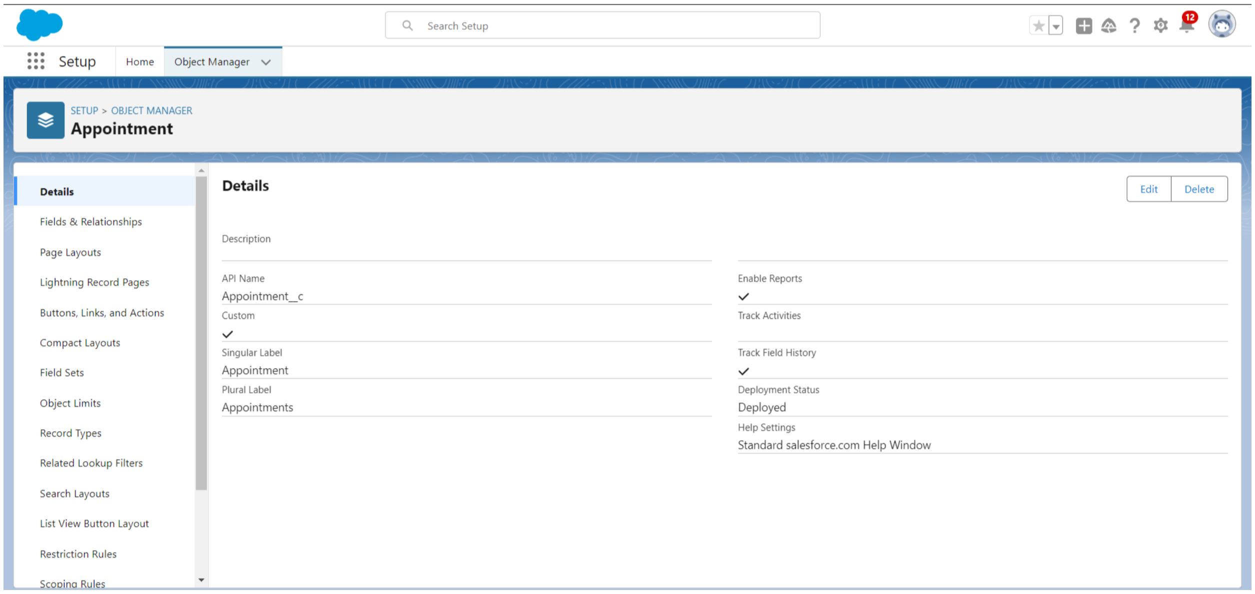
2. Enter the label name >> Customer Details
3. Plural label name >> Customer Details
4. Enter Record Name Label and Format
    i. Record Name >> Customer Name
    ii. Data Type >>Text
5. Click on Allow reports and Track Field History,
6. Allow search>> Save



b. Create Appointment Object

To create an object:

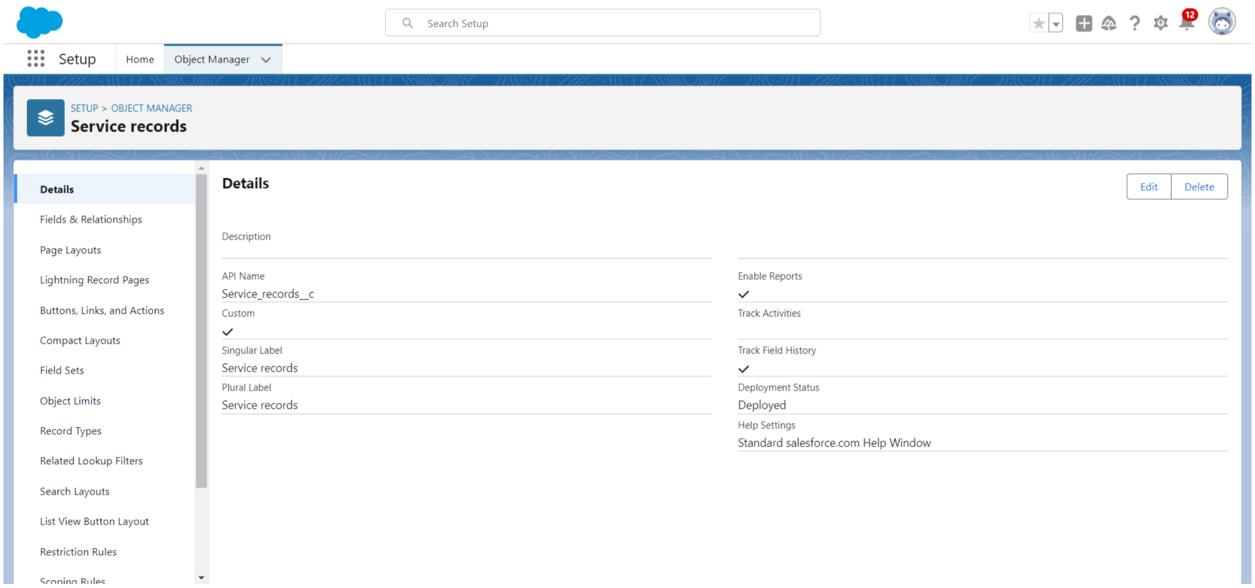
1. From the setup page >> Click on ObjectManager >> Click on Create>> Click on Custom Object.
2. Enter the label name >> Appointment
3. Plural label name >> Appointments
4. Enter RecordName Label and Format
    i. Record Name >> Appointment Name
    ii. Data Type >>Auto Number
    iii. Display Format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



c. Create Service RecordsObject

To create an object:

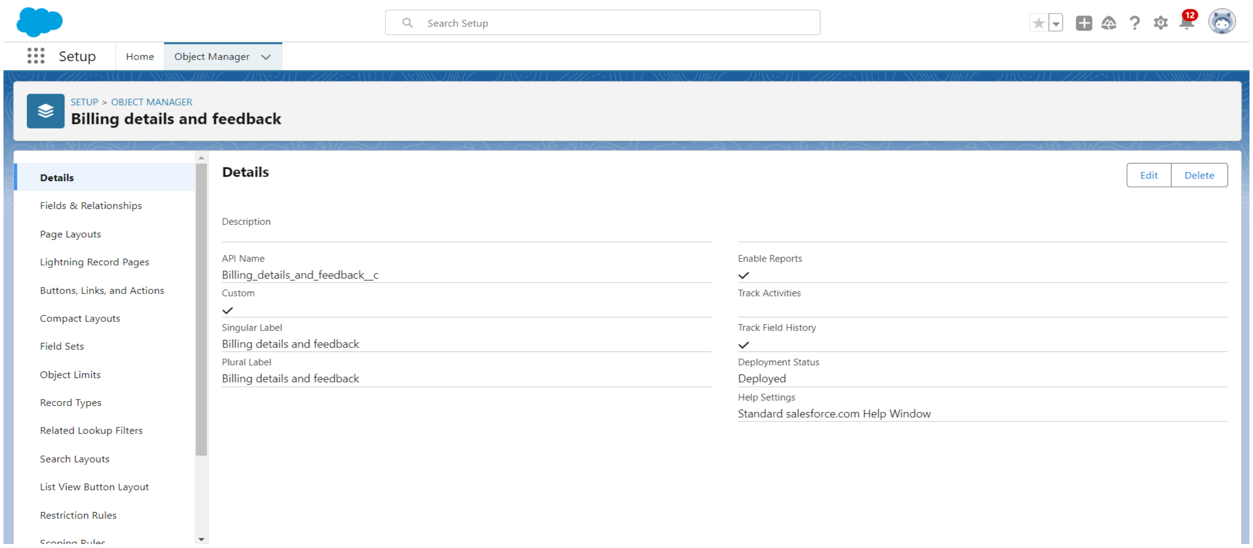
1. From the setup page >> Click on ObjectManager >> Click on Create>> Click on CustomObject.
2. Enter the label name >>Service records
3. Plural label name >> Servicerecords
4. Enter RecordName Label and Format
   i. Record Name >>Service records Name
   ii. Data Type >>Auto Number
   iii. Display Format >> ser-{000}
   iv. Starting number >> 1
5. Click on Allow reports and Track Field History,
6. Allow search >>Save.



d. Create BillingDetails And FeedbackObject

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
   i. Record Name >> Billingdetails and feedbackName
   ii. Data Type >>Auto Number
   iii. Display Format >> bill-{000}
   iv. Starting number >> 1
5. Click on Allow reports and Track Field History,
6. Allow search >>Save.

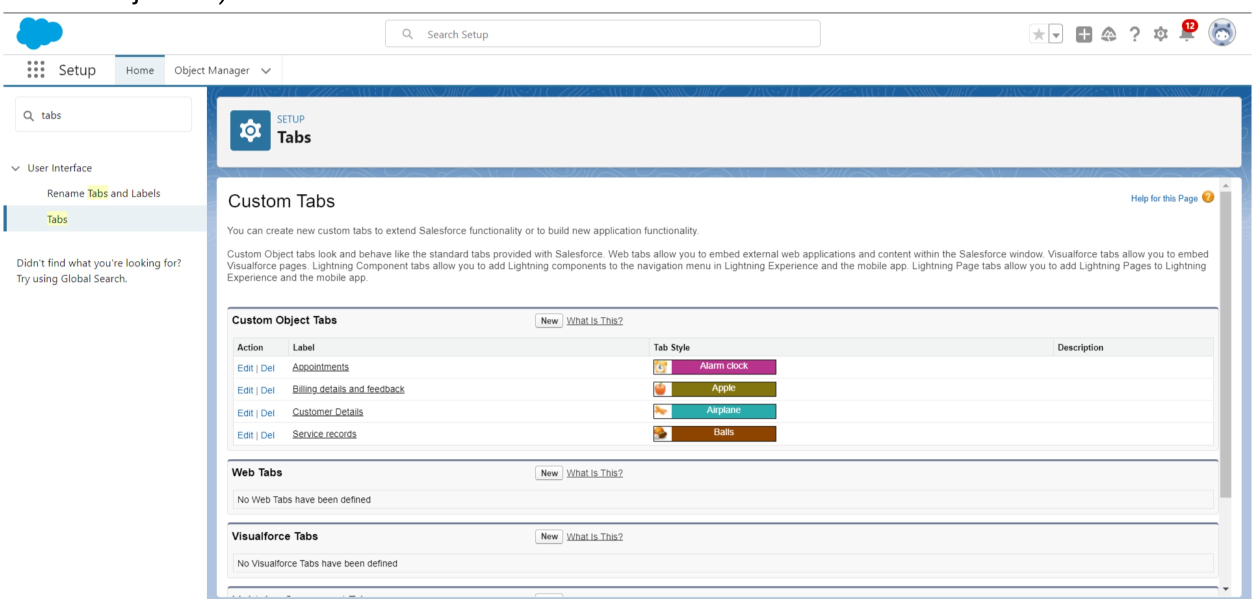


TASK 3:CREATE TABS

Creating A Custom Tab

To create a Tab:(Customer Details)

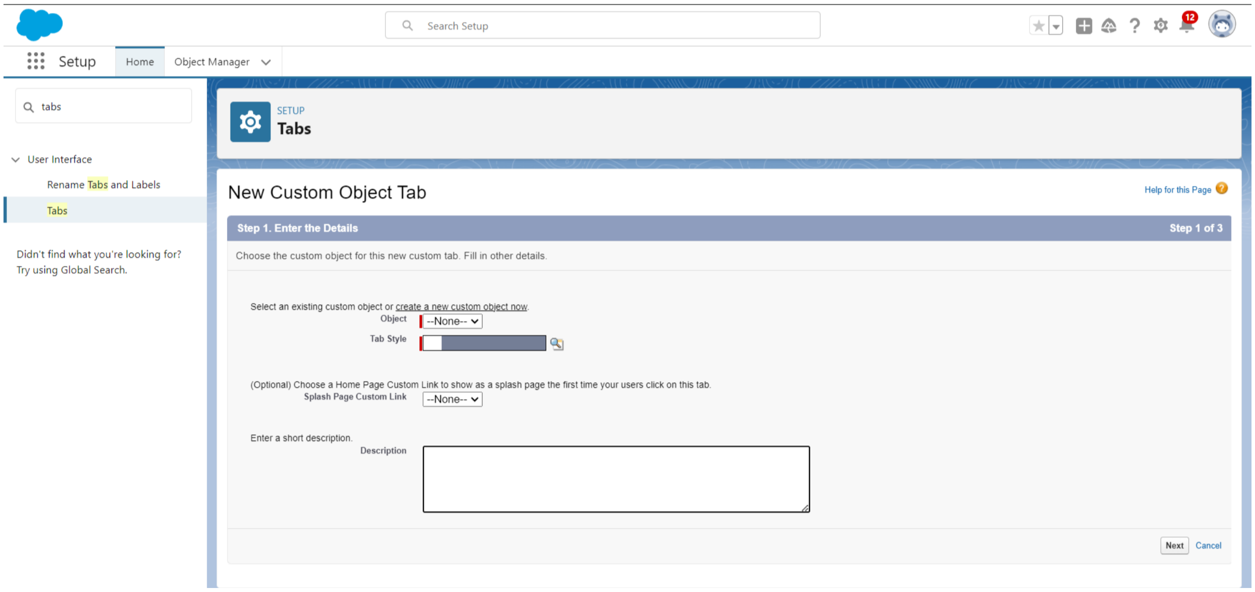
1. Go to setup page >> type Tabs in Quick Find bar >>click on tabs >> New (under custom objecttab)



2. Select Object(Customer Details) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck theincludetab .

3. Make sure that the Append tab to users'existing personal customizations is checked.

4. Click save.



To create a Tab:(Appointment)

1. Go to setup page >> type Tabs in Quick Find bar >>click on tabs >> New (under custom objecttab)
2. Select Object(Appointment) >>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

To create a Tab:(Service Records)

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

To create a Tab:(Billing details and feedback)

1. Go to setup page >> type Tabs in Quick Find bar >>click on tabs >> New (under custom object tab)

2. Select Object(Billing details and feedback) >> 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

TASK 4:CREATE THE LIGHTING APP

To create a lightning app page:

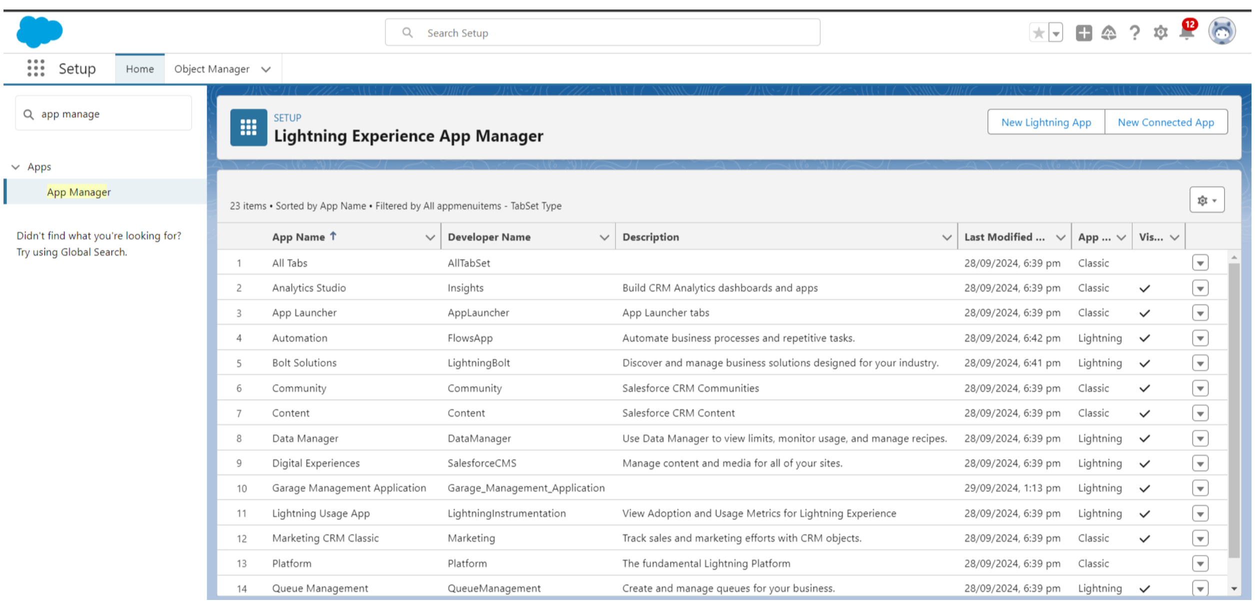
i. Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App.
ii. Fill the app name in app details as Garage Management Application >> Next >> (App option page) keep it as default >>Next >> (UtilityItems) keep it as default>> Next.

To Add Navigation Items:

i. Select the items (CustomerDetails,Appointments, Service records,Billing details and feedback,Reports and Dashboards) from the searchbar and move it using the arrowbutton >> Next.

To Add User Profiles:

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



TASK 5:CREATE THE FIELDS

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:
    i. Field Label: Phone number
    ii. FieldName : gets auto generated
    iii. 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:
    i. Field Label: Gmail
    ii. FieldName : gets auto generated
    iii. Click on Next >>Next >> Save and new.

Creation Of Lookup Fields

Creation of Lookup Field on Appointment Object :

1. Go to setup >> click on Object Manager >> type object name(Appointment) in the search bar >> clickon 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 “ CustomerDetails” 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 searchbar >> clickon the object.
2. Now click on “Fields &Relationships” >> New
3. Select “Look-up relationship” as data type and click Next.
4. Select therelated object “ Appointment ” and clicknext.
5. Makeit a required field so click on Required.

6. Scroll down for LookupFilter and clickon Show filtersettings.
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 clickon Active.
12. Next >> Next >> Save.

Creation of LookupField on Billingdetails and feedbackObject :

1. Go to setup >> click on Object Manager >> type object name(Billing details and feedback) in searchbar >> clickon 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 ObjectManager >> type object name(Appointment) in search bar >> click on theobject.
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 AnotherCheckbox Field on Appointment Object:

1. Repeat the stepsform 1 to 3.
2. Give the Field Label : Repairs
3. Field Name : is auto populated
4. Default value : unchecked

5. Click on next >> next >> save.
6. Follow the same and create anothercheckbox with given names
7. Give the Field Label: Replacement Parts
8. Field Name : is auto populated
9. Default value : unchecked
10. Click on next >> next >> save.

Creation of Checkbox Field on Service recordsObject :

1. Go to setup >>click on ObjectManager >> 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 Name : 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 ObjectManager >> type object name(Appointment) inthe search bar >> click on the object.
2. Now click on “Fields & Relationships” >>New.
3. Select “Date” as data type and click Next.
4. Givethe Field Label : Appointment Date
5. Field Name : 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 ObjectManager >> type object name(Appointment) in

the search bar >> clickon the object.

2. Now click on “Fields & Relationships” >>New.
3. Select “Currency” as data type and clickNext.
4. Give the Field Label : Service Amount
5. Field Name : is auto populated
6. Click on next
7. Give read only for all the profilesin field level security for profile.
8. Click on next > > save.

Creation of CurrencyField on Billingdetails and feedbackObject :

1. Follow the same steps as mentionedabove in Billingdetails and feedbackObject.
2. Change the label name as mentioned.
3. Givethe Field Label : Payment Paid
4. Field Name : is auto populated

Creation Of Text Fields

1. Go to setup >>click on ObjectManager >> type object name(Appointment) inthe search bar >> click on the object.
2. Now click on “Fields & Relationships” >>New.
3. Select “Text”as data type and clickNext.
4. Givethe Field Label : Vehicle numberplate
5. Field Name : is auto populated
6. Length : 10
7. Make field as Requiredand Unique.
8. Click on next >> next >> save.

Creation of Text Fields in Billing details and feedbackobject :

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 Requiredand 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 ObjectManager >> type object name(Service records) in search bar >> clickon 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 valuesas shown below.
5. The values are: Started, Completed
6. Click Next.
7. Next >> Next >> Save.

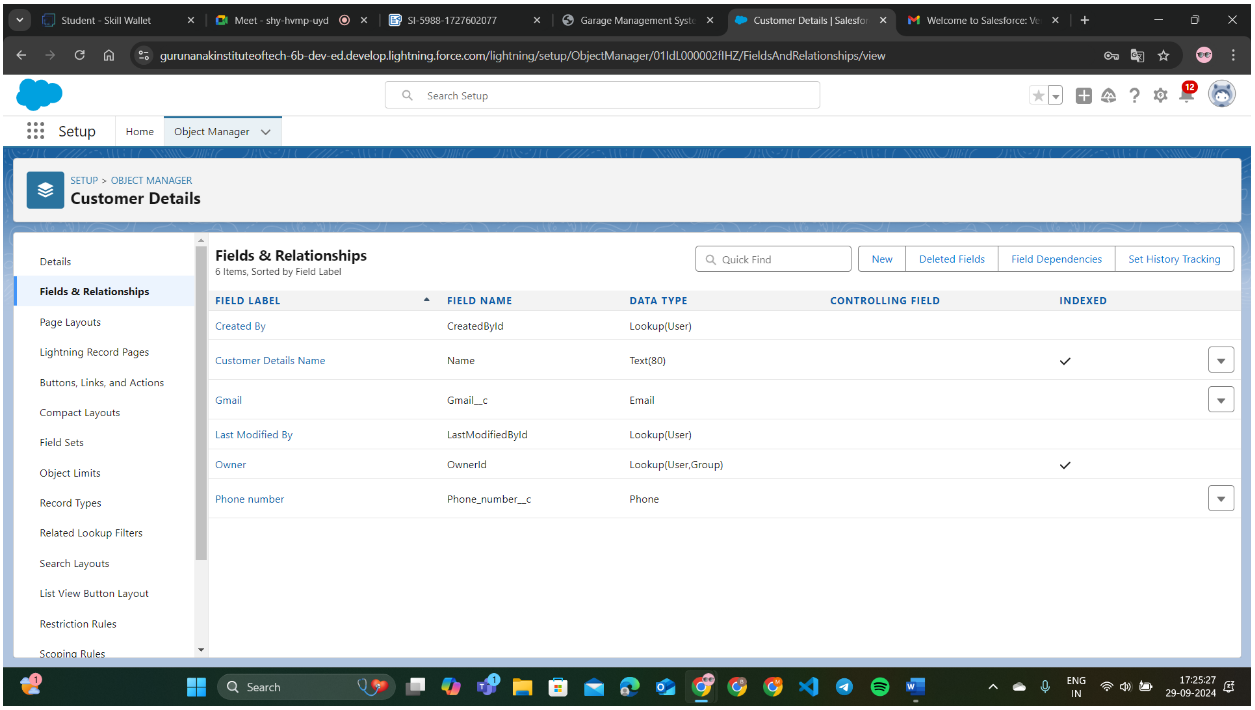
Creation of PicklistFields in Billingdetails and feedbackobject :

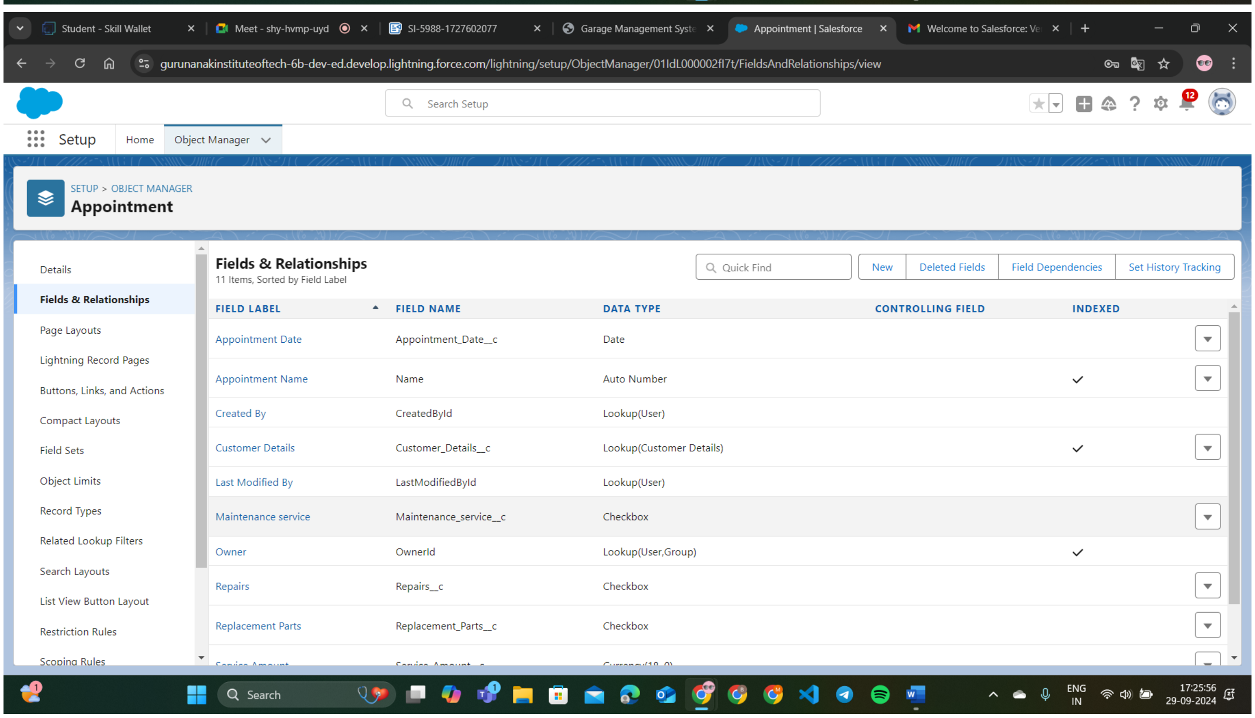
1. Go to setup >> click on Object Manager >> type object name(Billing details and feedback) in search bar >> clickon the object.
2. Click on fields & relationship >> click on New.
3. Select Data type as “Picklist” and click Next.
4. Enter Field Label as “Payment Status”,under values select “Enter values,with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

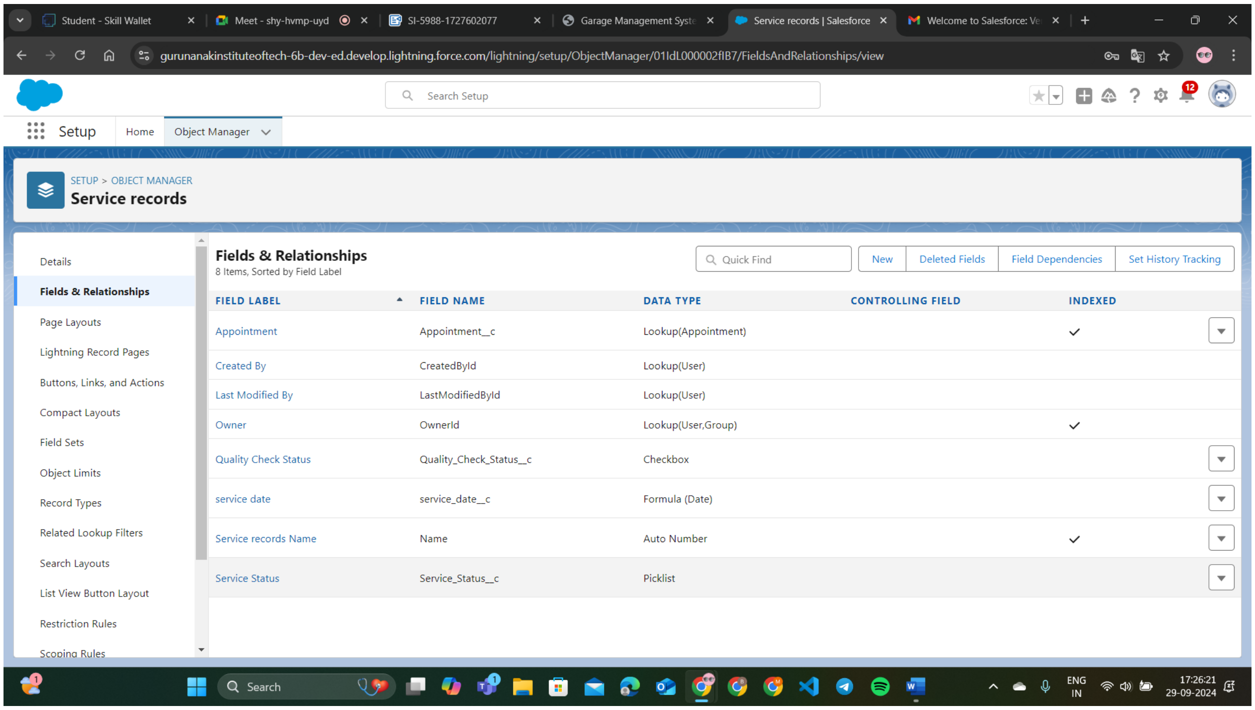
Creating Formula Field In Service Records Object

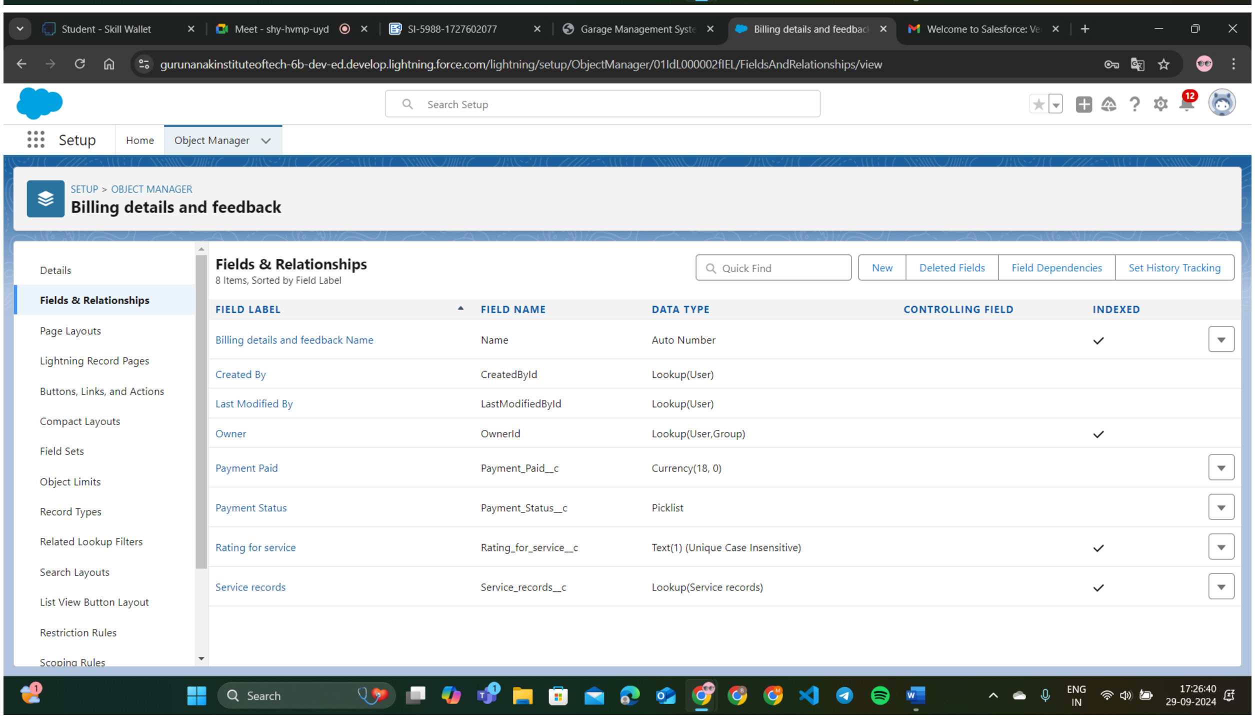
1. Go to setup >>click on ObjectManager >> type object name(Service records) in search bar >> click on theobject.
2. Click on fields & relationship >> click on New.
3. Select Data type as “Formula”and click Next.
4. Give Field Label and FieldName as “servicedate” and selectformula return type as “Date”and click next.

5. Insert field formula should be : CreatedDate
6. click “Check Syntax”.
7. Click next >> next >> Save.







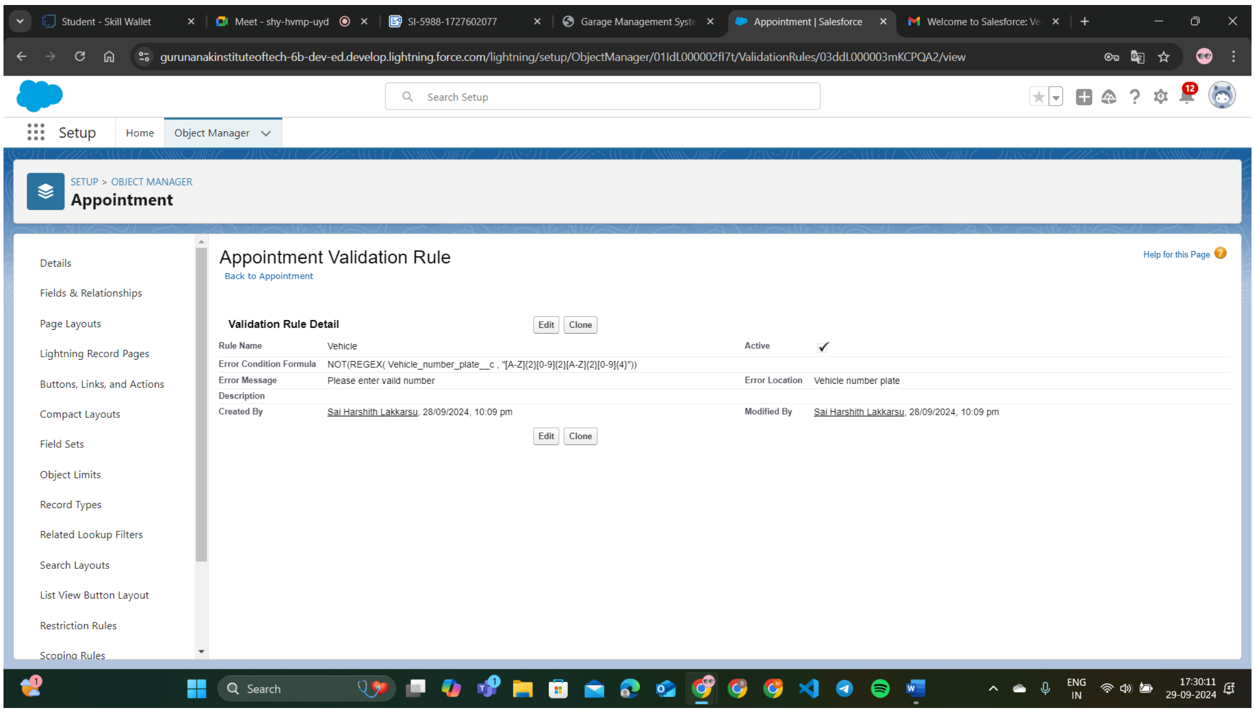


TASK 6:VALIDATION RULES

To Create A Validation Rule To An Appointment Object

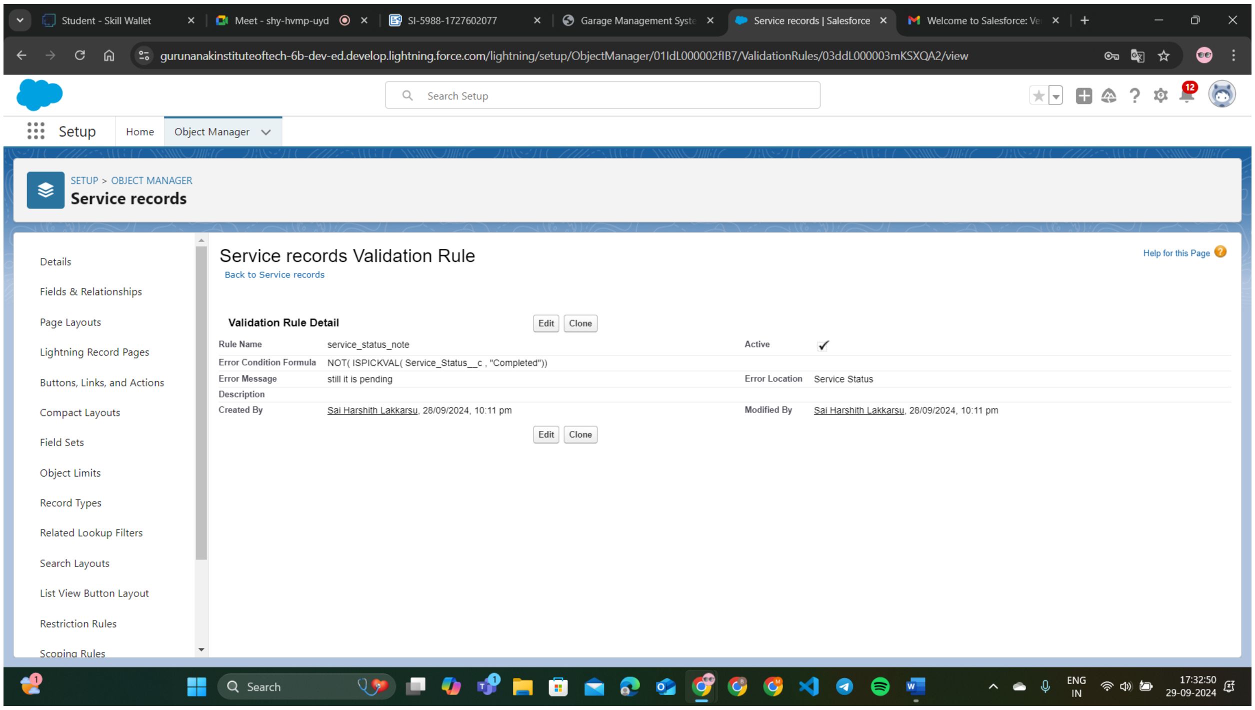
1. Go to the setup page >> click on object manager >> From drop down click edit for Appointment object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as “ Vehicle ”.
4. Insert the Error Condition Formula as : -

   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 valid number ”, select the Error location as Fieldand select the field as “Vehicle number plate”, and click Save.



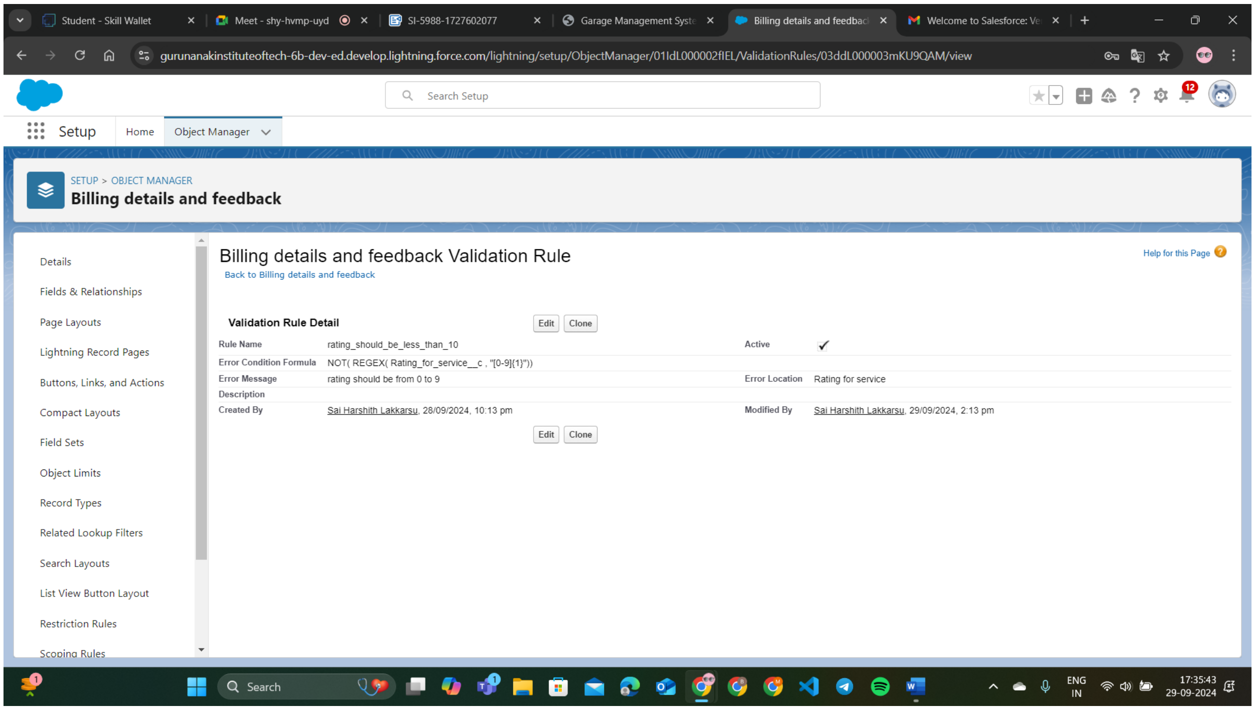
To Create A Validation Rule To An Service Records Object

1. Go to the setup page >> click on object manager >> From drop down click edit for Service recordsobject.
2. Click on the validation rule >> click New.
3. Enter the Rule name as “ service_status_note ”.
4. Insert the ErrorCondition 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_10".
4. Insert the Error Condition Formula as : -
   NOT(REGEX(Rating_for_service c , "[0-9]{1}"))
5. Enter the Error Message as "rating should be from 0 to 9", select the Error location as Field and select the field as "Rating for Service", and click Save.



TASK 7:DUPLICATE RULE

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. Givethe Rule name : Matching customerdetails
5. Unique name : is auto populated
6. Definethe matching criteria as

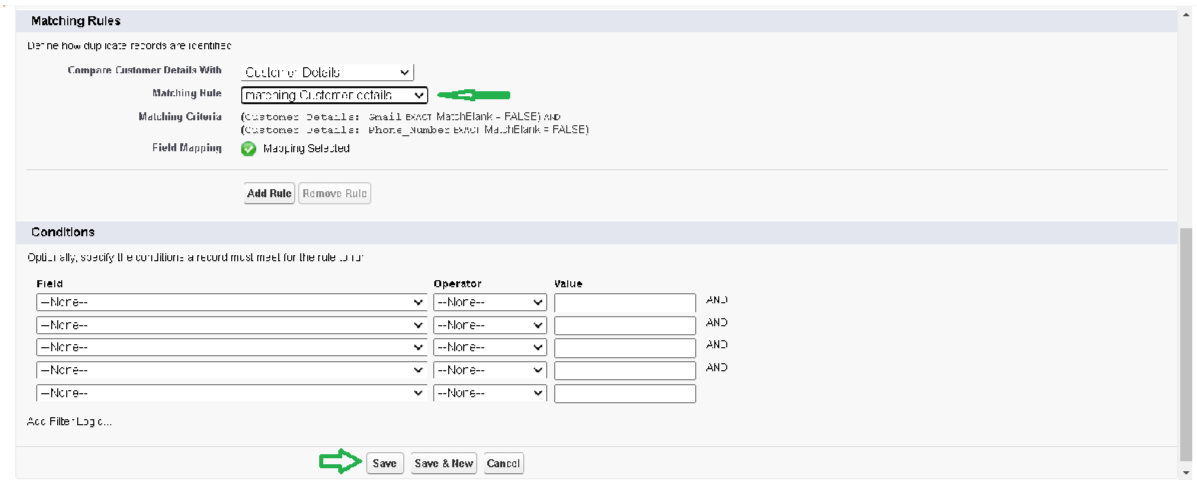
Field	Matching Method
a. Gmail	Exact
b. Phone Number	Exact

7. Click save.
8. After Saving Clickon Activate.

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 >> clickon New Rule >> selectcustomer 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 customerdetails
6. And Click on save.
7. After saving the DuplicateRule, Click on Activate.

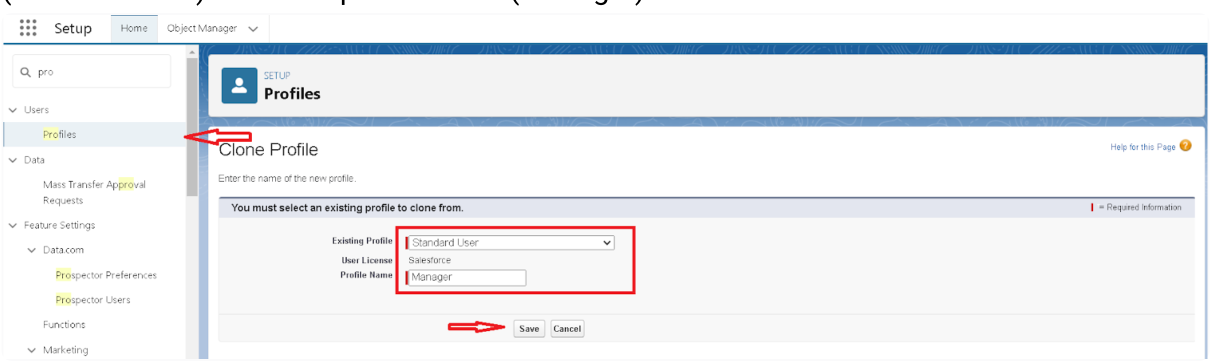


TASK 8:CREATE PROFILES

Manager Profile

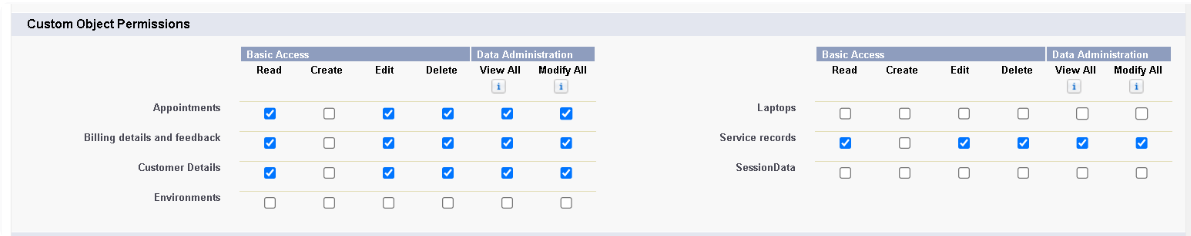
To create a new profile:

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.
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.



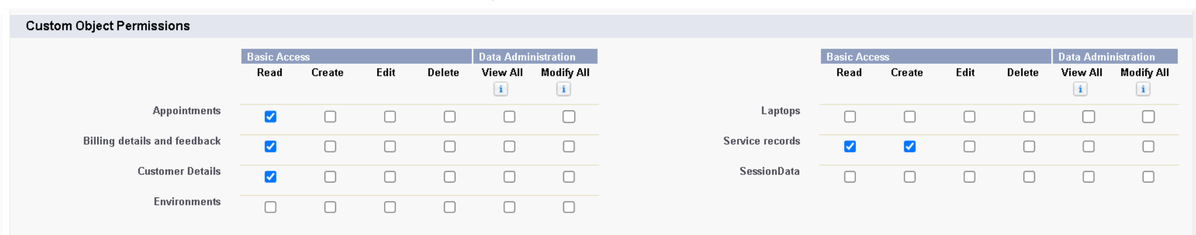
Custom Object Permissions

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Appointments	☑	☐	☑	☑	☑	☑
Billing details and feedback	☑	☐	☑	☑	☑	☑
Customer Details	☑	☐	☑	☑	☑	☑
Environments	☐	☐	☐	☐	☐	☐
Laptops	☐	☐	☐	☐	☐	☐
Service records	☑	☐	☑	☑	☑	☑
SessionData	☐	☐	☐	☐	☐	☐

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.

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

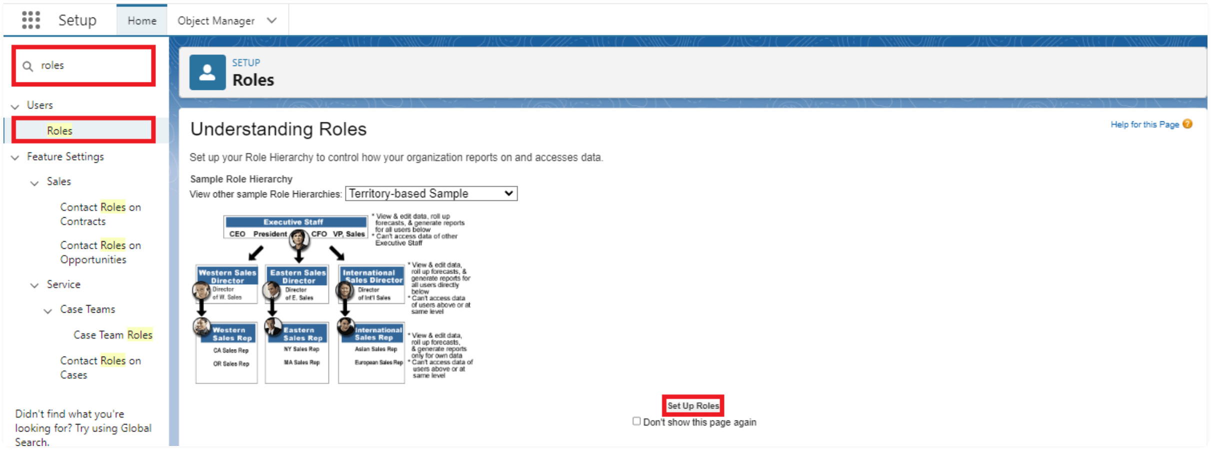
	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Appointments	☑	☐	☐	☐	☐	☐
Billing details and feedback	☑	☐	☐	☐	☐	☐
Customer Details	☑	☐	☐	☐	☐	☐
Environments	☐	☐	☐	☐	☐	☐
Laptops	☐	☐	☐	☐	☐	☐
Service records	☑	☑	☐	☐	☐	☐
SessionData	☐	☐	☐	☐	☐	☐

5. And click save.

Creating Manager Role

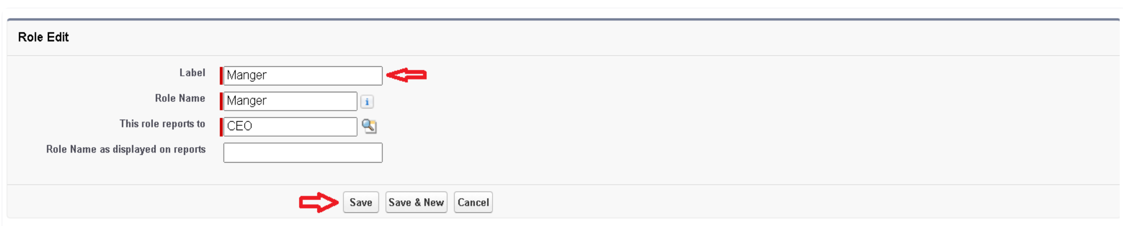
Creating Manager Role:

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.

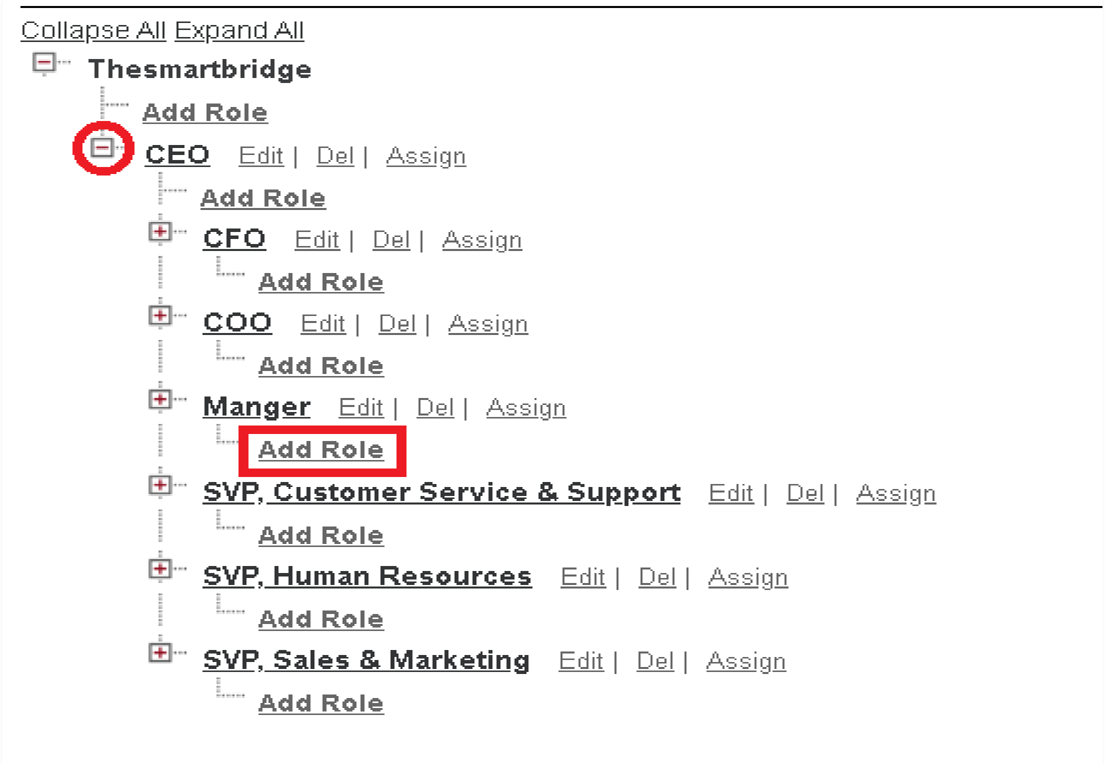
3. Give Label as “Manager” and Role name gets auto populated. Then click on Save.



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.

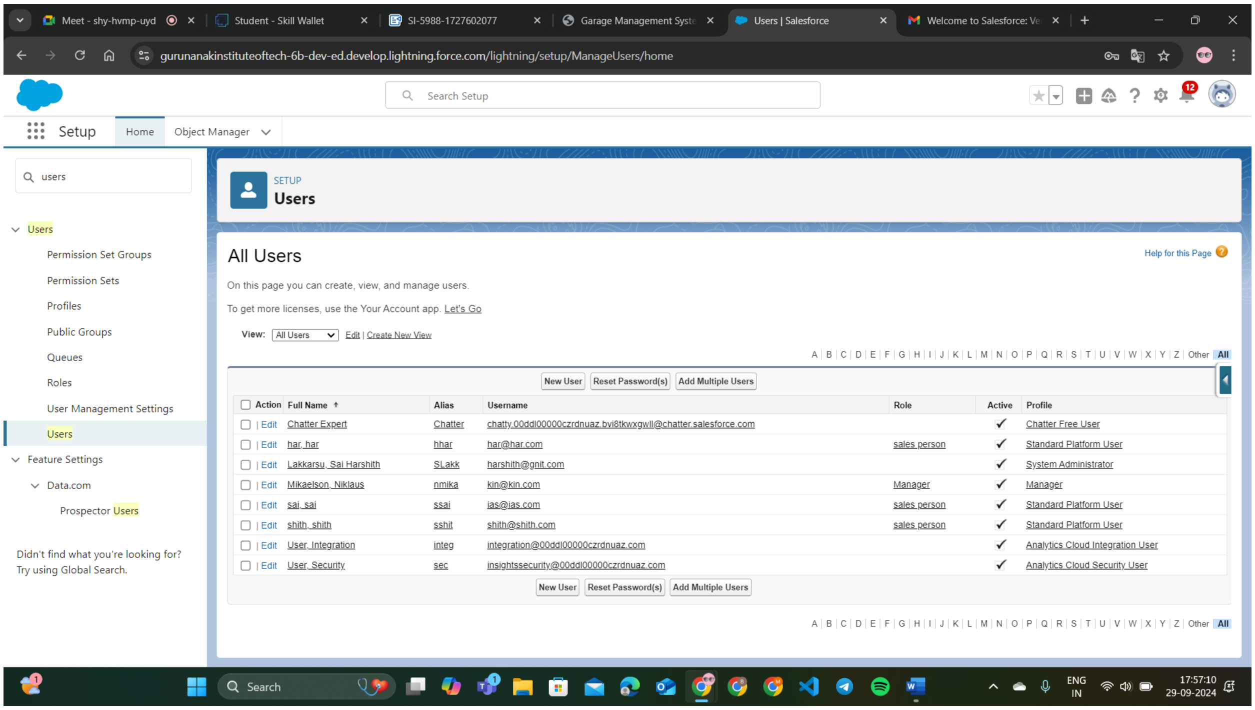


3. Give Label as “sales person” and Role name gets auto populated. Then click on Save.

TASK 10:USERS

Create User

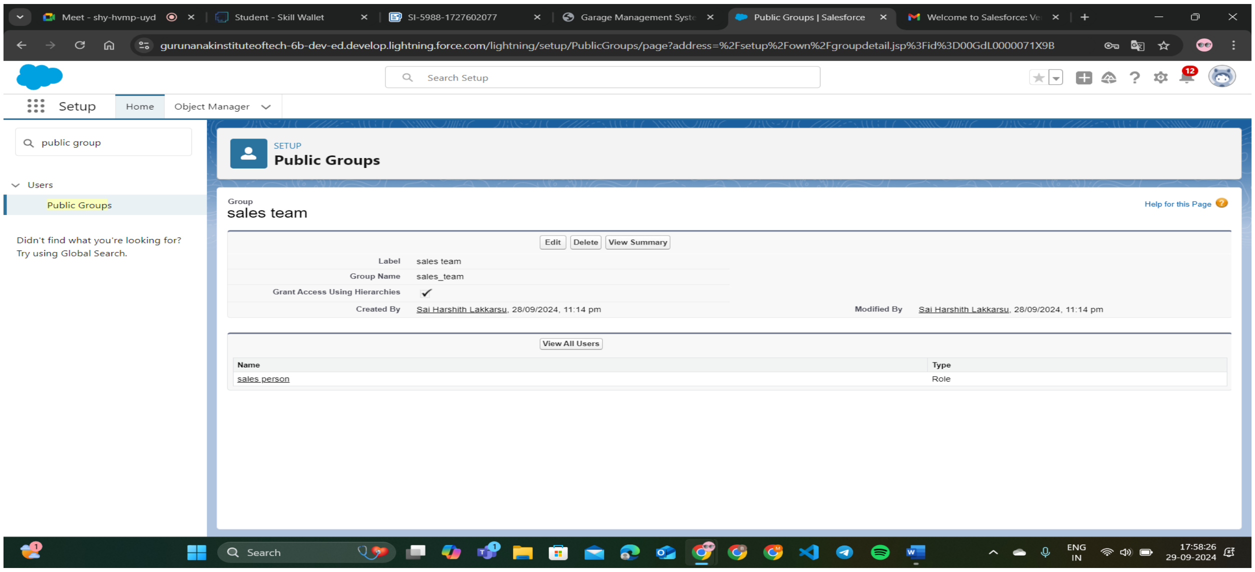
1. Go to setup >> type users in quick find box >>select users >>click New user.
2. Fill in the fields
    i. First Name : Nicklaus
    ii. Last Name: Mikaelson
    iii. Alias : Give a Alias Name
    iv. Email id : Give your Personal Emailid
    v. Username : Username should be in this form: text@text.text
    vi. Nick Name : Give a Nickname
    vii. Role : Manager
    viii. User license: Salesforce
    ix. Profiles : Manager
3. Save.



TASK 11:PUBLIC GROUPS

Creating New Public Group

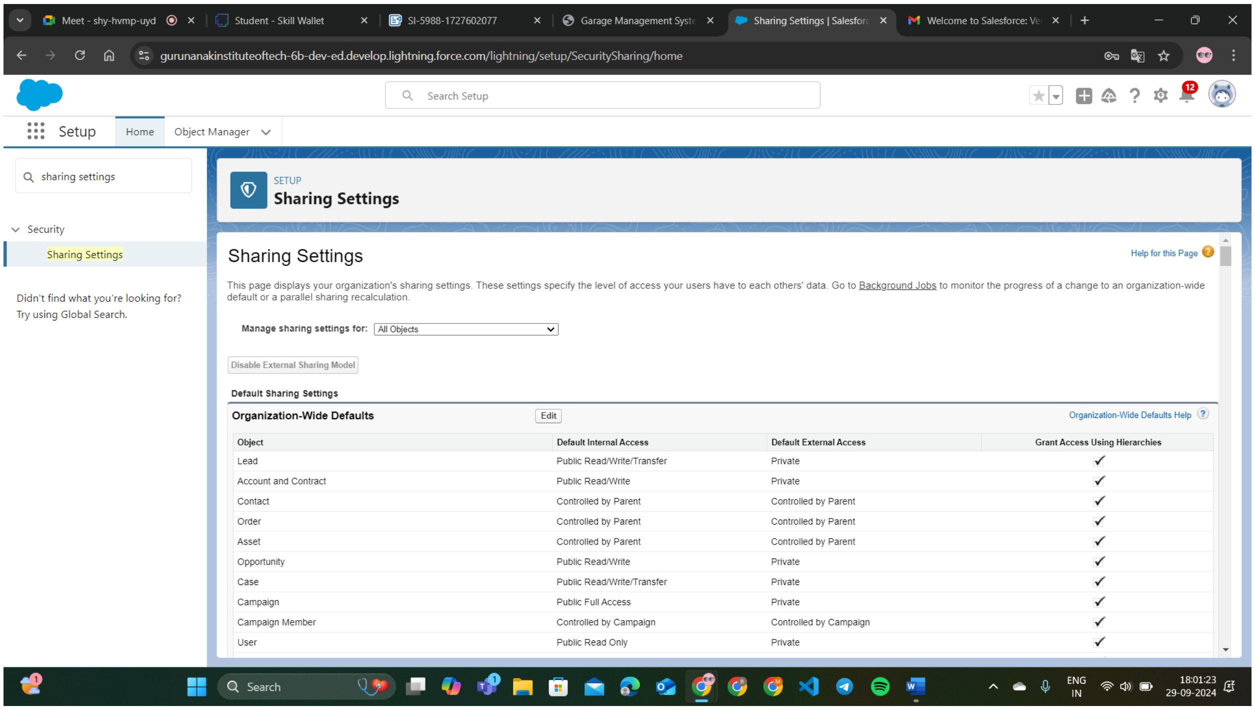
1. Go to setup >> type users in quick find box >>select public groups >> click New.
2. Give the Label as “sales team”.
3. Group name is auto populated.
4. Search for Roles.
5. In Available Members select Sales person and click on add it will be moved to selected member.
6. Click on save.



TASK 12:SHARESETTING

Creating SharingSettings

1. Go to setup >>type users in quick find box >>select Sharing Settings>> click Edit.
2. Change the OWD settingof 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 recordssharing Rules.
5. Give the Label name as “ Sharing setting”
6. Rule name is auto populated.
7. In step 3 : Select whichrecords to be shared, membersof “ Roles ” >>“ Sales person”
8. In step 4: share with, select “ Roles ” >> “ Manager ”
9. In step 5 : Change the accesslevel to “ Read / write ”.
10. Click on save.



TASK 13:FLOWS

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 Clickon Create.
3. Select the Object as “Billing detailsand feedback”in the Drop down list.
4. Select the Trigger Flow when: “A record is Created or Updated”.
5. Select the Optimizethe flow for: “Actions and Related Records” and Click on Done.
6. Under the Record-triggered Flow Click on “+” Symboland In the Drop down List select the “Update records Element”.
7. Give the Label Name : Amount Update
8. Api name : is auto populated
9. Set a filter condition : All Conditions are met(AND)
10. Field : Payment_Status c
11. Operator : Equals
12. Value : Completed
13. And Set Field Values for the Billing detailsand feedback Record
14. Field : Payment_Paid_c
15. Value : {!$Record.Service_records r.Appointment r.Service_Amount c}
16. Click On Done.

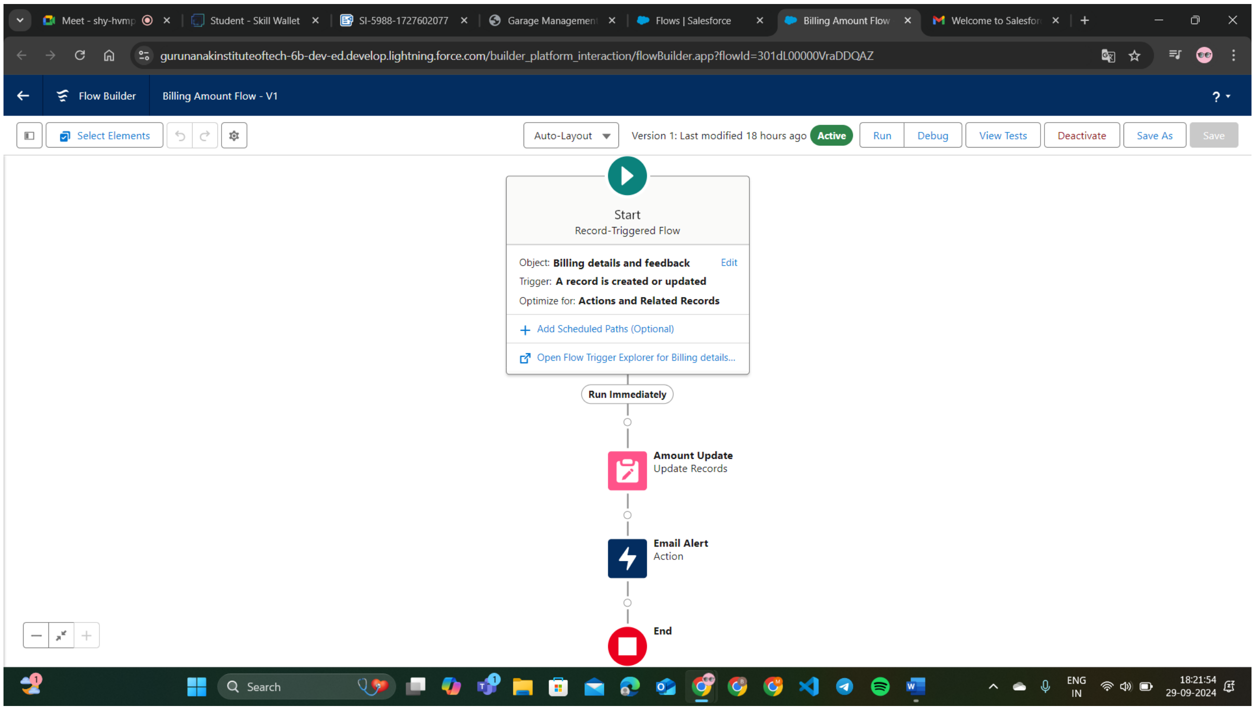
17. Before creatinganother Element. Createa New Resource form Toolboxform top left.
18. Click on the New Resource, And select Variable.
19. Select the resourcetype as text template.
20. Enter the API name as “ alert”.
21. Change the view as Rich Text ? View to Plain Text.
22. In body field pastethe syntax 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 recentpayment for the services providedby our garage management team.Your prompt paymentis greatly appreciated, and it helpsus continue to provide top-notch servicesto you and all our valued customers.

Amount paid : {!$Record.Payment_Paid c}
Thank you for Coming

23. Click done.
24. Now Click on Add Element , select Action.
25. Their actionbar will be opened in that searchfor “ send email ” and clickon it.
26. Give the label name as “ Email Alert”
27. API name will be auto populated.
28. Enable the body in set input values for the selectedaction.
29. Select the text template that created , Body : {!alert}
30. Include recipient address list select the email form the record.
31. RecipientAddressList:
    {!$Record.Service_records r.Appointment r.Customer_Name r.Gmail c}
32. Include subject as “ Thank You for Your Payment - Garage Management”.
33. Click done.
34. Click on save. Give the Flow label, Flow Api name will be auto populated.
35. And click save, and click on activate.



TASK 14:APEX TRIGGER

Apex Handler

UseCase : This use case works for Amount Distribution for each Service the customerselected for thereVehicle.

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 classas “AmountDistributionHandler ”.

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

Syntax For creating trigger :

The syntax for creating trigger is :

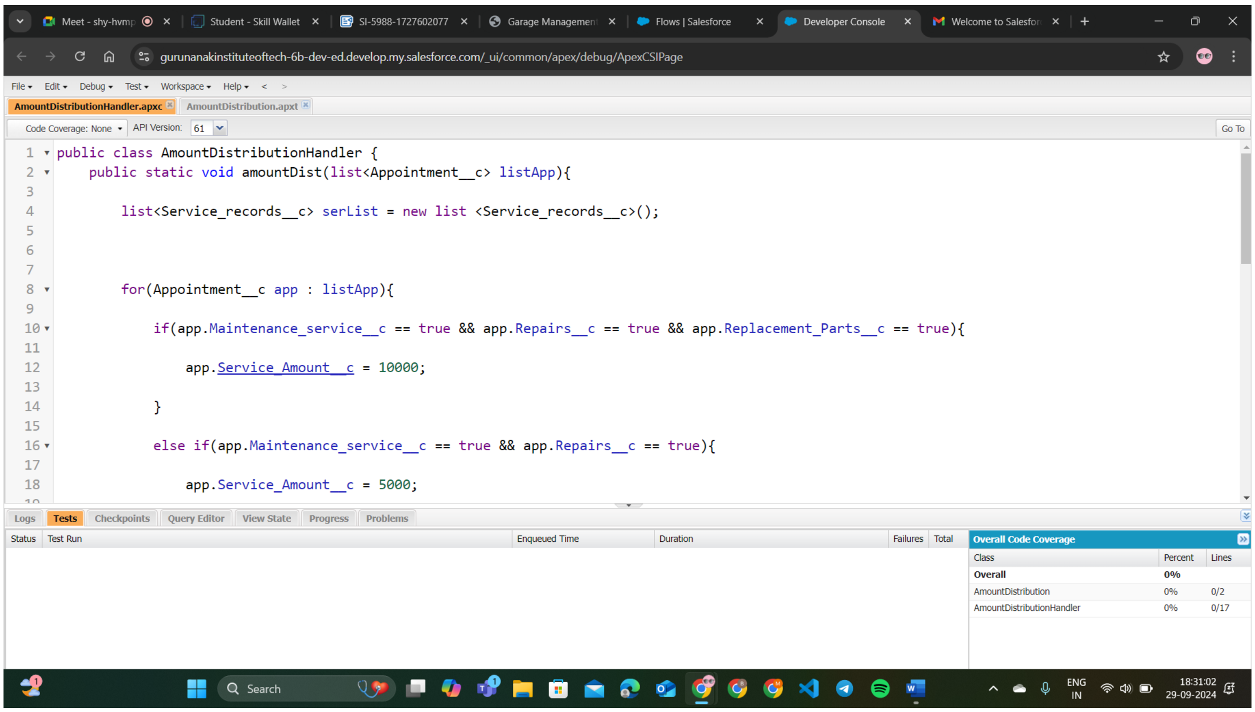
```
Trigger [trigger name] on [object name]( Before/After event)
{
}
```

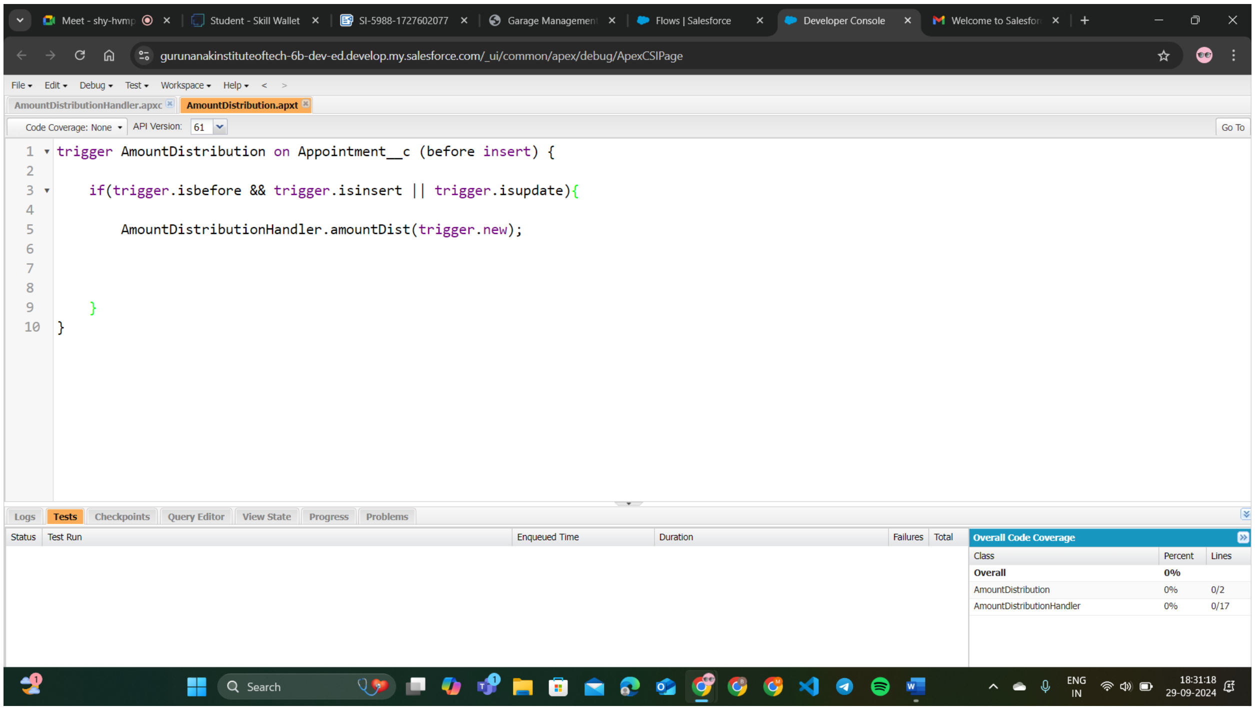
In this project , trigger is called whenever the particular records sum exceed the threshold i.e minimum business requirement value. Then the code in the trigger will get executed.

1. Handler for the Appointment Object

Code:

```
trigger AmountDistribution on Appointment__c (before insert, before update) {
   if(trigger.isbefore && trigger.isinsert || trigger.isupdate){
      AmountDistributionHandler.amountDist(trigger.new);
   }
}
```





TASK 15: REPORTS

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 “GarageManagement Folder”, Folderunique name will be autopopulated.
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 GarageManagement folder, andClick on share.
3. Select the share with as “roles”,in name field search for “manager”, give “view” as access for thatrole.
4. Then click share, and click on Done.

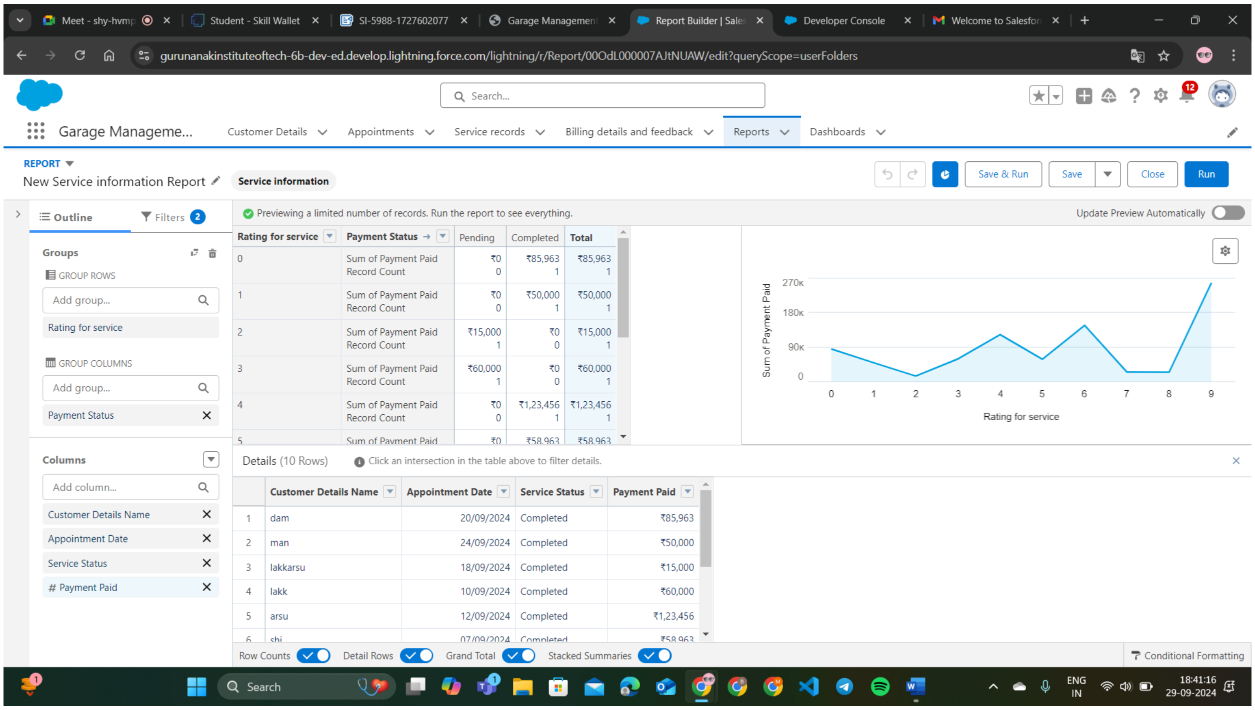
Create Report Type

1. Go to setup >>type users in quick find box >>select Report Type >> click on Continue.
2. Click on new customreport 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 “ Depolyed ”, click on Next.
9. now , Click on Related object box.
10. Click on Select Object,choose Appointment Objectas shown in fig.
11. Again Click to relate another object.
12. And select the related objectas “ service records”.
13. Repeat the process and select the related objectas “ Billing details and feedback”.
14. And click on save.

Create Report

Note: Before creating report, create latest “10” records in every object.Try to fill every field in each recordfor better experience.

1. Go to the app >>click on the reports tab
2. Click New Report.
3. Select the Categoryas other reports,search for ServiceInformation, select that report, click on it. And clickon start report.
4. Their outlinepane is openedalready, select the fields that mentioned belowin column section.
    a. Customer name
    b. Appointment Date
    c. Service Status
    d. Payment paid
5. Remove the unnecessary fields.
6. Select the fields that mentioned below in GROUP ROWS section.
    a. Rating for Service
7. Select the fields that mentioned below in GROUP COLUMNS section.
    a. 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 uniqueName is auto populated.
11. Select the folder the created and Click on save.



TASK 16: DASHBOARD

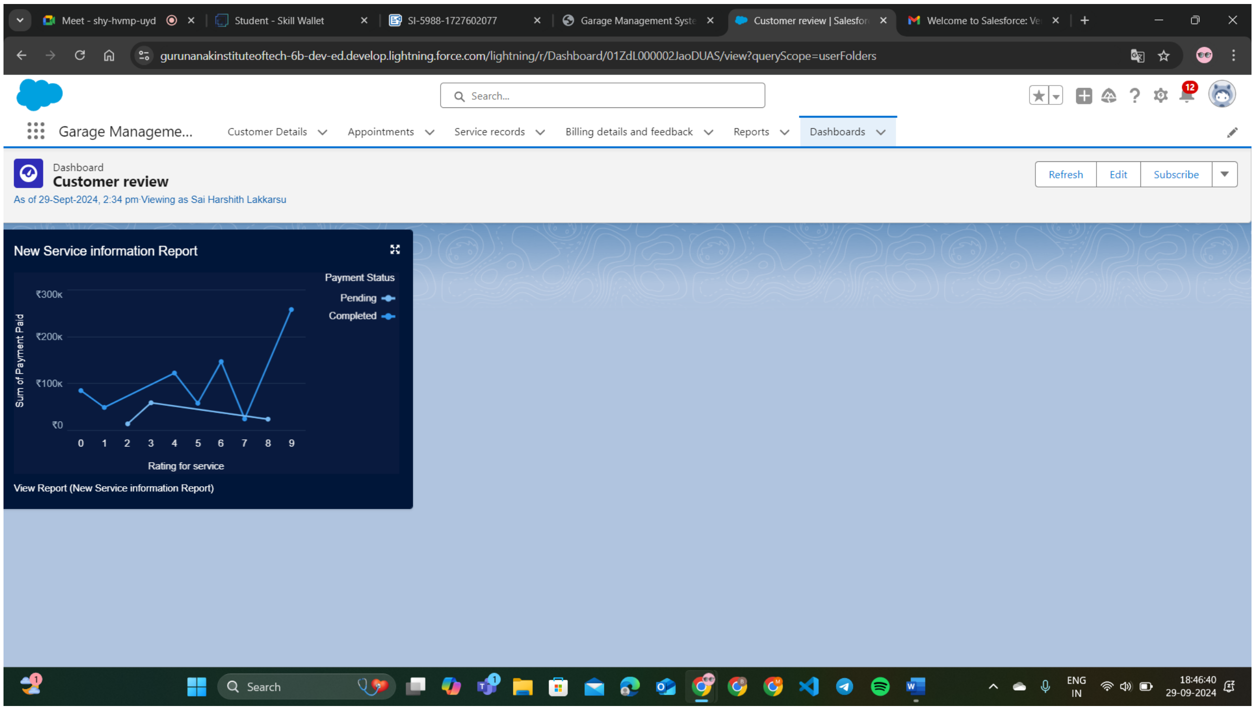
Create Dashboard Folder

1. Click on the app launcher and search for dashboard.
2. Click on dashboard tab.
3. Click new folder,give the folder label as " ServiceRating dashboard".
4. Folder uniquename will be auto populated.
5. Click save.
6. Follow the same steps, form milestone15, and activity 2, and provide the sharing settingsfor the folderthat just created.

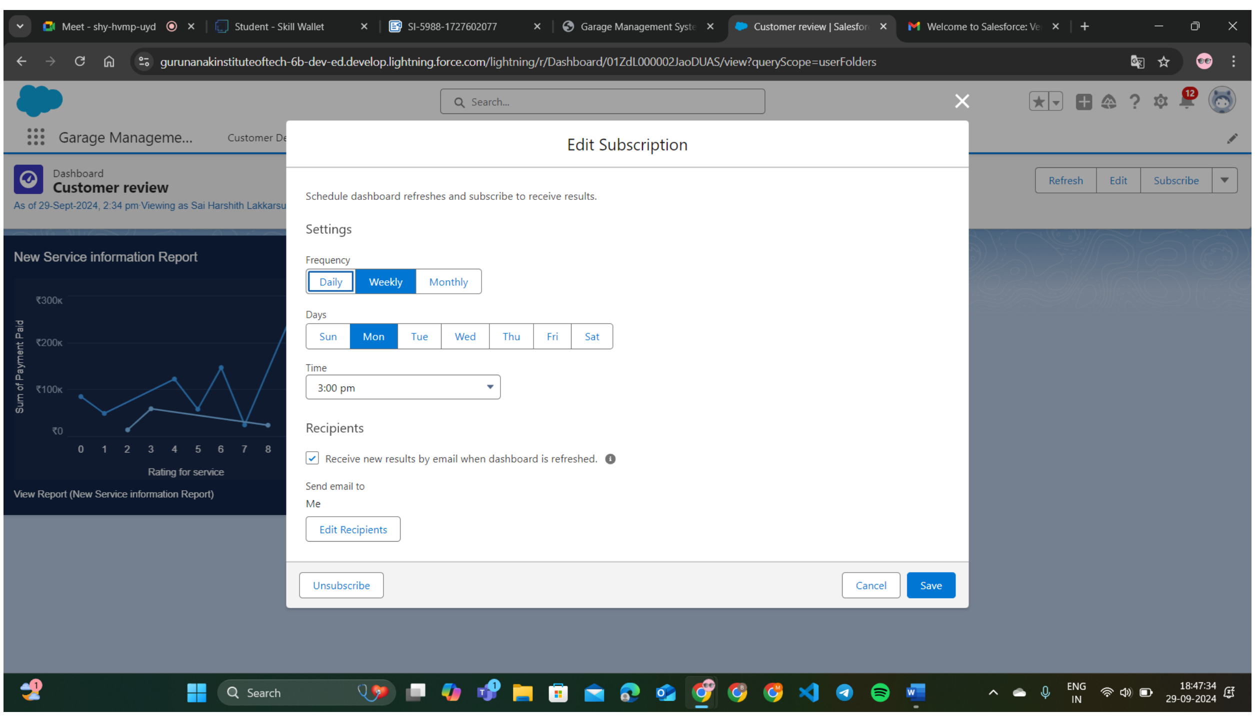
Create Dashboard

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 Reportand click on select.
5. Select the Line Chart.Change the theme.
6. Click Add then clickon Save and then clickon Done.

7. Preview is shown below.



8. After that Click on Subcribe on top right.
9. Set the Frequencyas “ weekly ”.
10. Set a day as monday.
11. And Click on save.



THANK YOU