

GARAGE MANAGEMENT SYSTEM(CRM)

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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
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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*
Your first name

Last Name*
Your last name

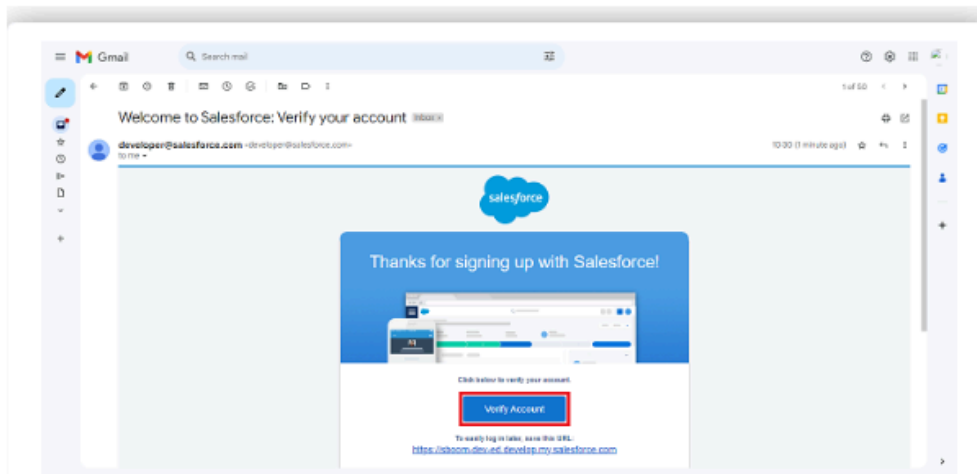
Email*
Your email address

Role*
Your job role

Company*
Company Name

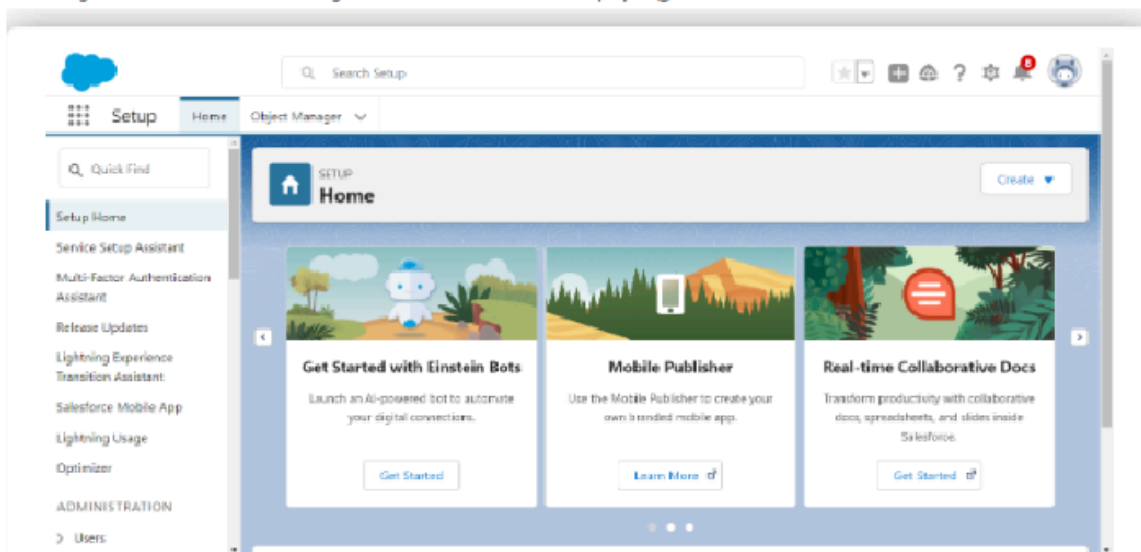
1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name

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.



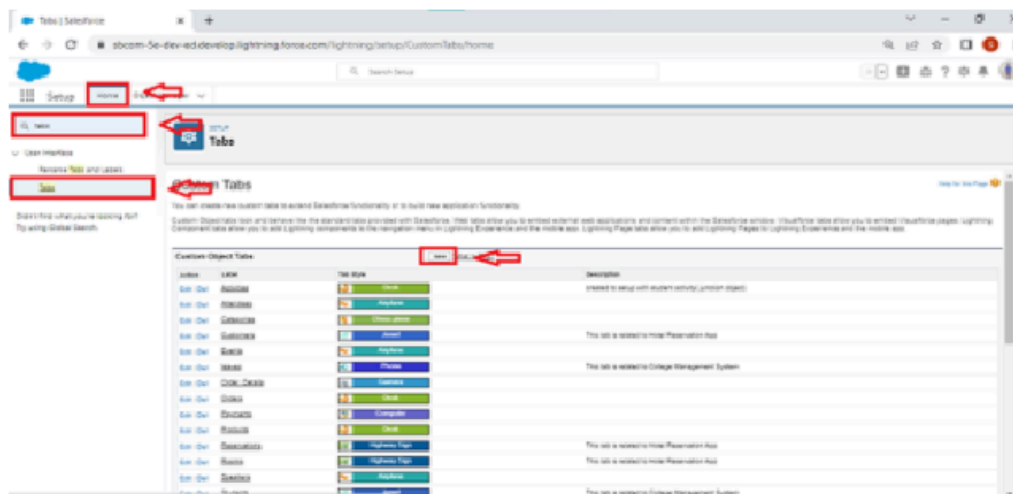
2. Click on Verify Account
3. Give a password and answer a security question and click on change password.

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



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.

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.



New Custom Object Tab

[Help for this Page](#)

Step 1: Enter the Details

Step 1 of 2

Choose the custom object for this new custom tab. Fill in other details.

Select an existing custom object or create a new custom object type.

Object:

Tab Style:

(optional) Choose a home page custom link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link:

Enter a short description:

Description

[Next](#) [Cancel](#)

Tab Style Selector

[Create your own style](#)

[Hide styles which are used on other tabs](#)

 Airplane	 Alarm clock	 Apple	 Balls
 Bank[1]	 Bell	 Big top	 Boat[1]
 Books	 Bottle	 Box	 Bridge
 Building	 Building Block	 Caduceus	 Camera
 Can	 Car	 Castle	 CD/DVD
 Cell phone	 Chalkboard	 Chess piece	 Chip
 Circle	 Compass	 Computer	 Credit card
 CRT TV	 Cup	 Desk[1]	 Diamond
 Dice	 Factory	 Fan	 Flag
 Form	 Gears	 Globe	 Guitar
 Hammer	 Hands	 Handsaw	 Headset

Step 3: Add to Custom Apps Step 3 of 3

Choose the custom apps for which the new custom tab will be available. You may also examine or alter the visibility of tabs from the detail and edit pages of each Custom App.

Custom App	<input type="checkbox"/> Include Tab
Platform (standard__Platform)	<input type="checkbox"/>
Sales (standard__Sales)	<input type="checkbox"/>
Service (standard__Service)	<input type="checkbox"/>
Marketing (standard__Marketing)	<input type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Mobile User	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>

Analytics Studio (standard__Insights)	<input type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input type="checkbox"/>
Service Console (standard__LightningService)	<input type="checkbox"/>
Bots (standard__LightningBots)	<input type="checkbox"/>
Lightning Usage App (standard__LightningUsageApp)	<input type="checkbox"/>
Digital Experiences (standard__ExperienceCloud)	<input type="checkbox"/>
Queue Management (standard__QueueManagement)	<input type="checkbox"/>
Bot Solutions (standard__LightningBots)	<input type="checkbox"/>
Data Manager (standard__DataManager)	<input type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>

☒ Append tab to users' existing personal customizations

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

App Manager | Salesforce

sbcom-5e-dev-ed.develop.lightning.force.com/lightning/setup/NavigationMenus/home

Setup Home Object Manager

app-manager

app

Lightning Experience App Manager

Click App (Beta)

Quickly create new Lightning apps by cloning existing apps. To use the beta feature, indicate that you're ready for legal requirements and agree to participate by toggling Enable App Cloning. See additional details and terms in the [Winter 23 release notes](#).

Enable App Cloning ☐

23 items • Sorted by App Name • Filtered by All applications • Select Type

App Name	Developer Name	Description	Last Modified	App Type	W.L.
1. All Tests	APFTest		04/10/2022, 10:10 am	Classic	
2. Analytics Studio	Insights	Build CRM Analytics dashboards and apps	04/10/2022, 10:10 am	Classic	✓
3. App Launcher	AppLauncher	App Launcher tabs	04/10/2022, 10:10 am	Classic	✓
4. Bot Solutions	LightningBots	Discover and manage business solutions designed for your industry	04/10/2022, 10:10 am	Lightning	✓
5. Chatter Desktop	ChatterDesktop	Chatter Desktop is an Adobe AIR-based desktop application that lets Chatter users stay connected...	28/10/2022, 4:04 pm	Connected (Managed)	
6. Chatter Mobile for BlackBerry	ChatterForBlackBerry	The Salesforce.com Chatter Mobile app lets you access Chatter data on the go. Use it to view feeds...	28/10/2022, 4:05 pm	Connected (Managed)	
7. College Management System	Hudson	demo app	05/10/2022, 4:18 pm	Lightning	✓
8. Community	Community	Salesforce CRM Communities	04/10/2022, 10:10 am	Classic	✓
9. Content	Content	Salesforce CRM Content	04/10/2022, 10:10 am	Classic	✓
10. Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage records.	04/10/2022, 10:10 am	Lightning	✓

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

*App Name

Enter your app name...

*Developer Name

Enter a developer name...

Description

Enter a description...

App Branding

Image

Upload

Primary Color Hex Value

#0070C2

Org Theme Options

☐ Use the app's image and color instead of the org's custom theme

App Launcher Preview

To Add Navigation Items:

New Lightning App

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

Type to filter list...

- Accounts
- Activities
- Alert Settings
- All Sites
- Alternative Payment Methods
- App Launcher
- Appointment Initiations

Selected Items

No items selected

New Lightning App

User Profiles

Choose the user profiles that can access this app.

Available Profiles

Type to filter list...

- Analytics Cloud Integration User
- Analytics Cloud Security User
- Authenticated Website
- Authenticated Website
- Content Manager
- Custom Org Data Proxy User
- Custom Sales Profile

Selected Profiles

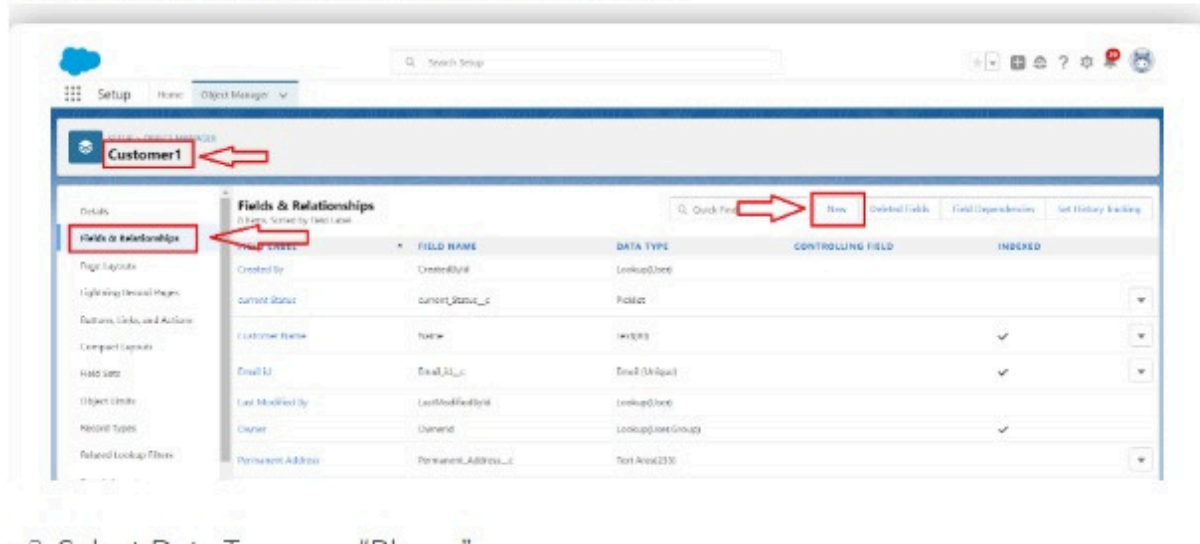
No profiles selected



Object Manager
2 items, sorted by name

NAME	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Customer	Customer	Standard Object			
Customer Detail	Customer_Detail__c	Custom Object		8/17/2023	✓

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



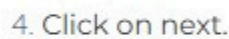
Setup Home Object Manager

Customer1

Fields & Relationships
0 items, sorted by last used

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	Lookup(Owner)		
Current Status	Picklist		
Customer Name	Text		✓
Email ID	Email (Unique)		✓
Last Modified By	Lookup(Owner)		
Owner	Lookup(Owner Group)		✓
Permanent Address	Text Area(255)		



Setup | Home | Object Manager

Object Manager

Search: app | Schema Editor | Create

NAME	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Appointment	Appointment__c	Custom Object		21/05/2022	✓
Appointment Category	AppointmentCategory	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invoice	AppointmentInvoice	Standard Object			

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

Setup | OBJECT MANAGER | Appointment

Fields & Relationships

Fields & Relationships

Field Label: FIELD LABEL FIELD NAME DATA TYPE CONTROLLING FIELD INBOUND

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INBOUND
Appointment Date	AppointmentDate__c	Date		
Appointment Name	Name	Auto Number		✓

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

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

Data Type

☐ None Selected Select one of the data types below.

☐ Auto Number An integer value of numbers that are in a fixed length. The number is automatically incremented for each record.

☐ Currency A numeric field that represents a fixed length of numbers. The format is controlled by the currency symbol.

☐ Email A text field that displays the email address of a record or a related record.

☒ Look-up Relationship Creates a relationship that links data to another object. The user can select a value from a list of records in a related list.

☐ Master-Detail Relationship Creates a special type of relationship between two objects. The master object (the parent) controls the ownership and sharing of the data.

Next Cancel

Lookup Filter

Optionally, create a filter to limit the records available to users in the lookup field. [Learn more](#)

Filter Criteria

Field: Appointment: Appointment Date Operator: less than Value/Field: (Field) Appointment: Created Date

Filter Type

☒ Required. The user entered value must match filter criteria.

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

Lookup Window Text

Active ☒ Enable this filter

Change Field Type Save Cancel

Appointment

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Levels

Record Types

Related Lookup Filters

Search Layouts

ListView Button Layout

Restriction Rules

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

Data Type

☐ None Selected Select one of the data types below.

☐ Auto Number A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.

☐ Formula A read-only field that stores its value from a formula expression you define. The formula field is updated when any of the source fields change.

☐ Pick List A read-only field that displays the user, administrator, or system's value of a field as a selected list on the record card of all records listed in a related list.

☐ Lookup Relationship Creates a relationship that links this object to another object. The relationship field allows users to click on a linkage icon to select a value from a pop-up list. The other object is the source of the values in the list.

☐ Master Detail Relationship Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where:

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create drop-down menus on the master record to streamline the data entry.

The relationship field allows users to click on a linkage icon to select a value from a pop-up list. The master object is the source of the values in the list.

☐ External Lookup Relationship Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

☒ Checkboxes Allows users to select a true (checked) or false (unchecked) value.

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

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

Appointment

New Custom Field

Step 2 of 4

Field Label: Maintenance service

Default Value: ☒ Checked ☒ Unchecked

Field Name: Maintenance_service

Description:

Help Text:

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

Appointment

New Custom Field

Step 2 of 4

Field Label: Appointment Date

Field Name: Appointment_Date

Description:

Help Text:

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

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

Default Value: Show Formula Editor

Step 2. Enter the details Step 2 of 4

Field Label: [x](#)

Please enter the length of the number in the number of decimal places. For example, a number with a length of 6 and 2 decimal places can record values up to "123456.00".

Length: [x](#) Decimal Places: [x](#)

Field Name: [x](#) Number of digits to the right of the decimal point

Description:

Help Text: [x](#)

Required: ☐ Always require a value in this field if the record is saved & record
☒ Add this field to existing custom reports on objects that contain this field [x](#)

State add to custom report type

6. Click on next

7. Give read only for all the profiles in field level security for profile.

Step 3. Establish field level security Step 3 of 4

Field Label: Service Amount
 Data Type: Currency
 Field Name: Service_Amount
 Description:

Select the profiles to which you want to grant edit access to the field via field-level security. The field will be hidden from all profiles if you do not add it to field-level security.

Field-Level Security for Profile	<input checked="" type="checkbox"/> Visible	<input checked="" type="checkbox"/> Read Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Cross Org Data Proxy User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>

Step 2. Enter the details Step 2 of 4

Field Label: [x](#)

Values: ☐ Use global picklist value set.
☒ Picklist values, with each value separated by a new line

☐ Display values alphabetically, not in the order entered
☐ Use first value as default value [x](#)
☒ Restrict picklist to the values defined in the value set [x](#)

Field Name: [x](#)

Description:

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

☐ None Selected
☐ Classification
☐ Currency
☒ Date
☐ DateTime

Select one of the data types below.

☐ Calculate a boolean value.
 Example: $([TOTAL]) > [MaxDate]$

☐ Calculate a dollar or other currency amount and automatically format the field as a currency amount.
 Example: $([Sum]([Miles] - [Amount]) - [Cost])$

☐ Calculate a date, for example, by adding or subtracting days to other dates.
 Example: $([Period]([Date] - [CloseDate]) / 7)$

☐ Calculate a datetime, for example, by adding a number of hours or days to another datetime.
 Example: $([Now] - [Start]) * 1$

5. Insert field formula should be : CreatedDate

Insert Field

Select a field, then click Insert. Labels followed by a ">" indicate that there are more fields available.

Service records >

- \$API >
- \$Label >
- \$Organization >
- \$Profile >
- \$System >
- \$User >
- \$UserRole >

Appointment

- Appointment >
- Created By >
- Created By ID
- Created Date
- Last Activity Date
- Last Modified By >
- Last Modified By ID
- Last Modified Date

You have selected:

CreatedDate

Type: DateTime

API Name: CreatedDate

Insert

Close

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: $[Reminder Date] - [Close Date] > 7$ [View Example](#)

Simple Formula | **Advanced Formula**

Insert Field: Insert Operator:

Runtime:
 ABS
 ACOS
 ACCMONTHS
 AND
 ASIN

Quick Tip:
 • Getting Started
 • Operators & Functions

Validation Rule Edit Save Save & New Cancel

Rule Name: Vehicle

Active: ☒

Description: vehicle

Error Condition Formula

Example: Discount Percent >= 30 [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: Vehicle number plate Insert Operator

NOT (REGEX (Vehicle number plate , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{2}"))

Check Syntax

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](#)

5. 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: Please enter valid number

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 Vehicle number plate

Save Save & New Cancel

Validation Rule Edit Save Save & New Cancel

Rule Name: rating should be less than 5

Active: ☒

Description:

Error Condition Formula:

Quick Tip: [Operators & Functions](#)

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.

Insert Field: Insert Operator:

NOT (REGEX(Rating_for_Service__c , "[1-5]([1]*)"))

Check Syntax

Error Message

Example: Discount percent cannot exceed 10%

This message will appear when Error Condition formula is true

Error Message: rating should be from 1 to 5

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

Setup Home Object Manager

Q: matching →

or This: →

or Duplicate Management: →

Matching Rules →

Didn't find what you're looking for? Try using global search.

Matching Rules

All Matching Rules

What Are Matching Rules?

New: Create New Rule

Name	Rule Name	Object	Status	Description	Last Modified Date	Last Modified By

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

Matching Rule: **New Matching Rule** Help for this Page

Step 1 of 2: Select object

Select the object to which this matching rule applies

Select: Customer details

Next Cancel

Next Cancel

Matching Rules

Define how duplicate records are identified.

Compare Customer Details With: Customer Details

Matching Rule: matching Customer details

Matching Criteria: (Customer Details) Last Mod >= (Matched) + 15.00 and
(Customer Details) ID = (Name_Unique_Sort_MatchID) + 15.00

Field Mapping: Merge Selected

[Add Rule](#) [Remove Rule](#)

Conditions

Optionally, specify the conditions a record must meet for the rule to run:

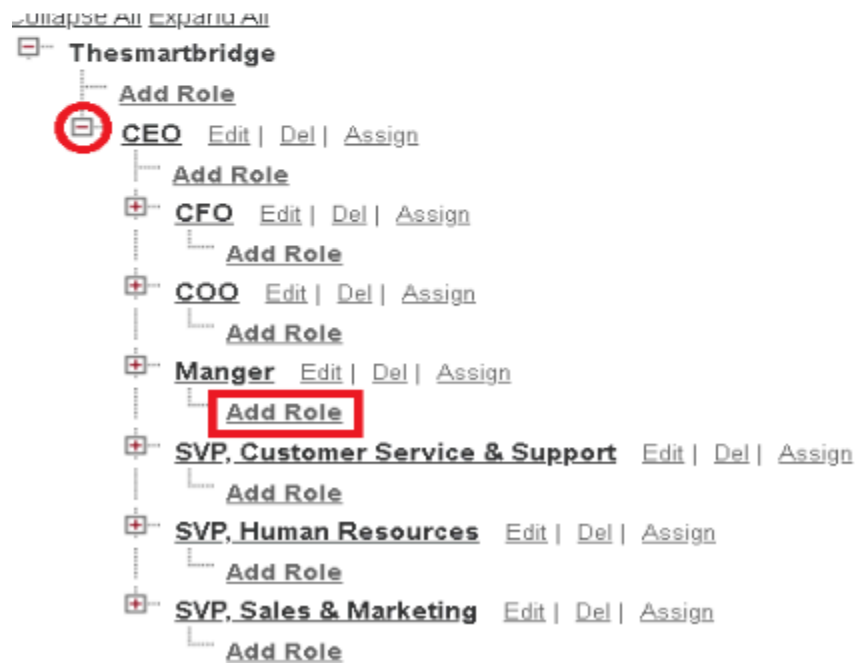
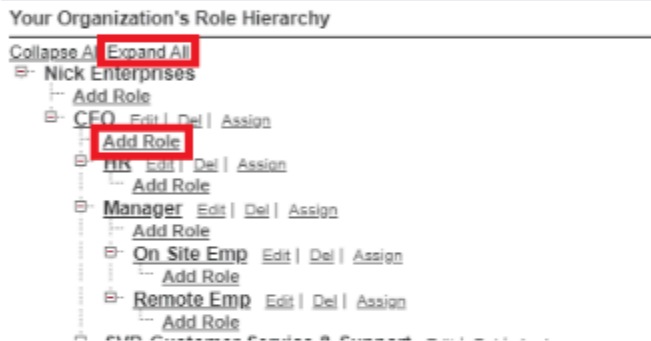
Field	Operator	Value	
Name	= Name		AND
Name	= Name		AND
--None--	= None		AND
--None--	= None		AND
--None--	= None		AND

[Add Filter Logic...](#)

[Save](#) [Save & Run](#) [Cancel](#)



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



Create User

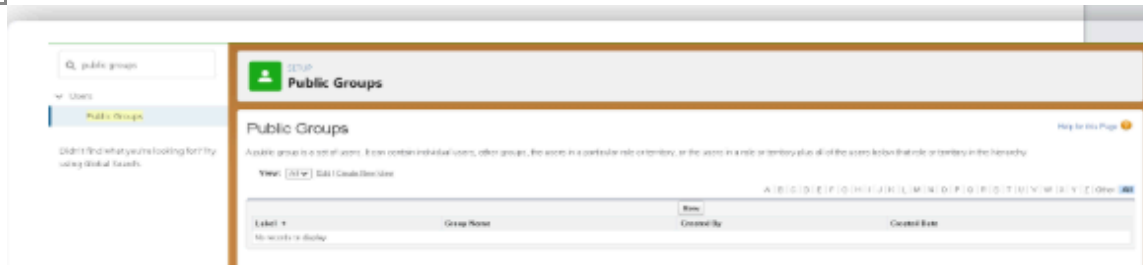
1. Go to setup >> type users in quick find box >> select users >> click New user.
2. Fill in the fields
 1. First Name : Niklaus
 2. Last Name : Mikaelson
 3. Alias : Give a Alias Name
 4. Email id : Give your Personal Email id
 5. Username : Username should be in this form: text@text.text
 6. Nick Name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

New User

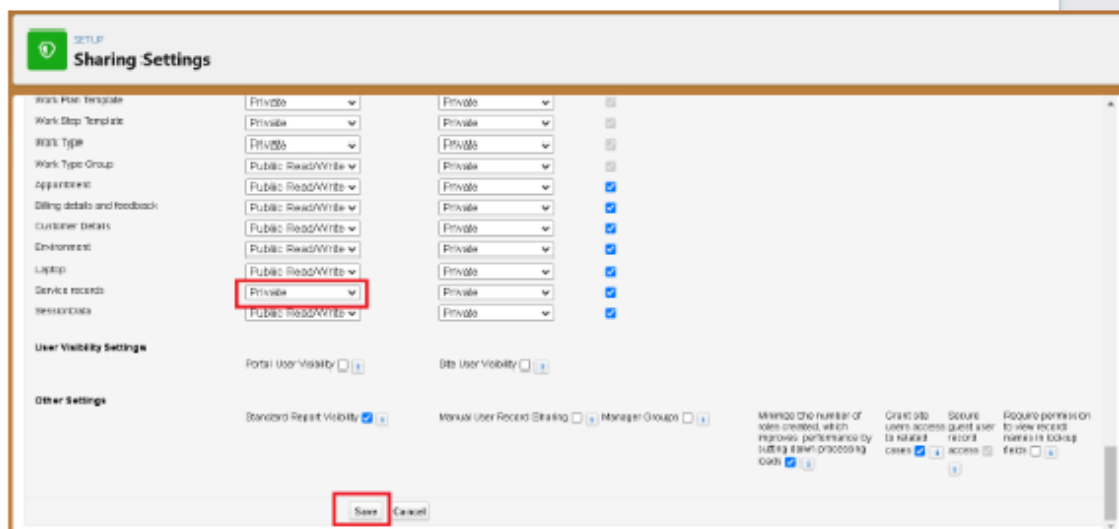
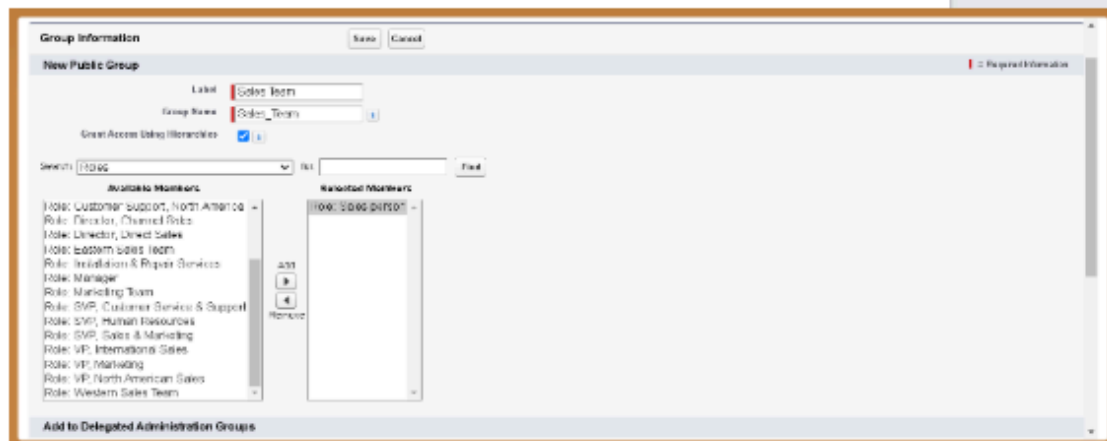
User Edit Save Save & More Cancel

General Information

First Name: Niklaus
Last Name: Mikaelson
Alias: mika
Email:
Username: Mikaelson@niklaus
Nickname: mika
Title:
Company:
Department:
Division:
Role: Manager
User License: Salesforce
Profile: Manager
Active: ☒
Marketing User: ☐
Offline User: ☐
Knowledge User: ☐
Flow User: ☐
Sales Cloud User: ☐
Site.com Contributor User: ☐




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.




SETUP
Sharing Settings

Not all sharing rules apply to all records. Select the records to share, then select the access.

Step 1: Rule Name

Label: 


Rule Name: 

Description:


Step 2: Select your rule type

Rule type: ☒ Based on record owner ☐ Based on criteria


Step 3: Select which records to be shared


Service records owned by members of: 

Step 4: Select the users to share with



Share with: 

Step 5: Select the level of access for the users

Access Level: 



Setup **Flows**

Flow Trigger Explorer  **New Flow** 

Flow Definitions
All Flows

(7 items • Filter by Flow Label • Filtered by All flow definitions • Updated a few moments ago)

Flow Label	Process Type	Active	St...	Package State	St...	Last Modified By	Last Modified
Account update	Autolaunched Flow	<input type="checkbox"/>	<input type="checkbox"/>	Managed		Vivek Venkatesh Venugopal Andipati	07/06/2023, 11:35 am
Book Appointment from Invitation	Schedule-Triggered Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed	Installed		
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input type="checkbox"/>	Managed	Installed		

2. Select the Record-triggered flow and Click on Create.

New Flow



Core **All** **Templates**

Screen Flow

Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and more.

Record-Triggered Flow

Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.

Schedule-Triggered Flow

Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.

Platform Event—Triggered Flow


Launches when a platform event message is received. This autolaunched flow runs in the background.

Autolaunched Flow (No Trigger)

Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.

Record-Triggered Orchestration

Launches when a record is created or updated. An orchestration lets you create a multi-step, multi-user process.

 **Create**

Configure Start

Select Object

Select the object whose records trigger the flow when they're created, updated, or deleted.

* Object

Willing clients and feedback

Configure Trigger

* Trigger the Flow When:

☐ A record is created

☐ A record is updated

☒ A record is created or updated

☐ A record is deleted

Set Entry Conditions

Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.

If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

Condition Requirements

None

* Optimize the Flow for:

Fast Field Updates

Update fields on the record that triggers the flow to run. This high-performance flow runs before the record is saved to the database.

Actions and Related Records

Update any record and perform actions, like send an email. This more flexible flow runs after the record is saved to the database.

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

Cancel

Done

Amount Update

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

Edit Action

Use values from earlier in the flow to set the inputs for the "Send Email" core action. To use its outputs later in the flow, store them in variables.

*Label

Email Alert

*API Name

Email_Alert

Description

Set Input Values for the Selected Action

A₃ Body ⓘ

{!alert}



A₃ Email Template ID



Ⓞ Log Email on Send



Record-Triggered Flow

Start

Save as

A New Version

A New Flow

*Flow Label

Billing Amount Flow

*Flow API Name

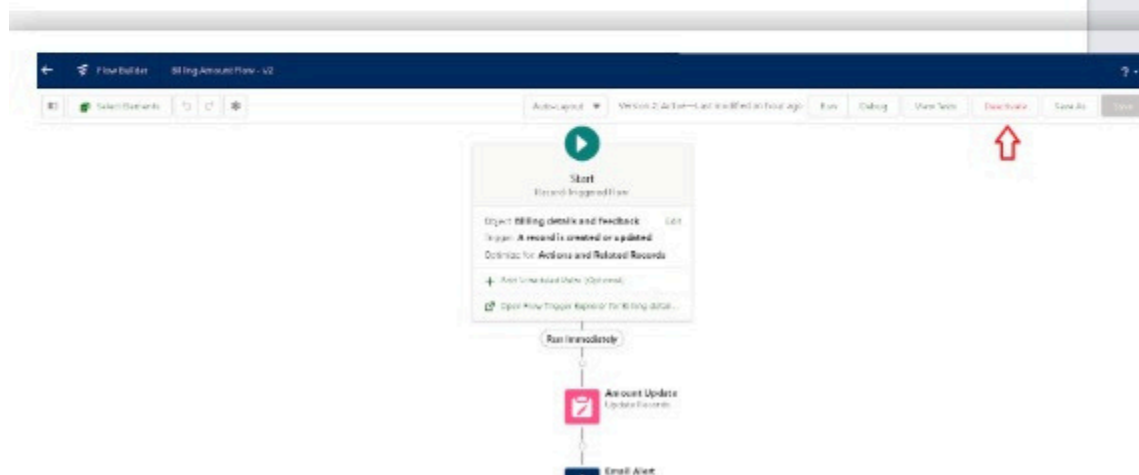
Billing_Amount_Flow

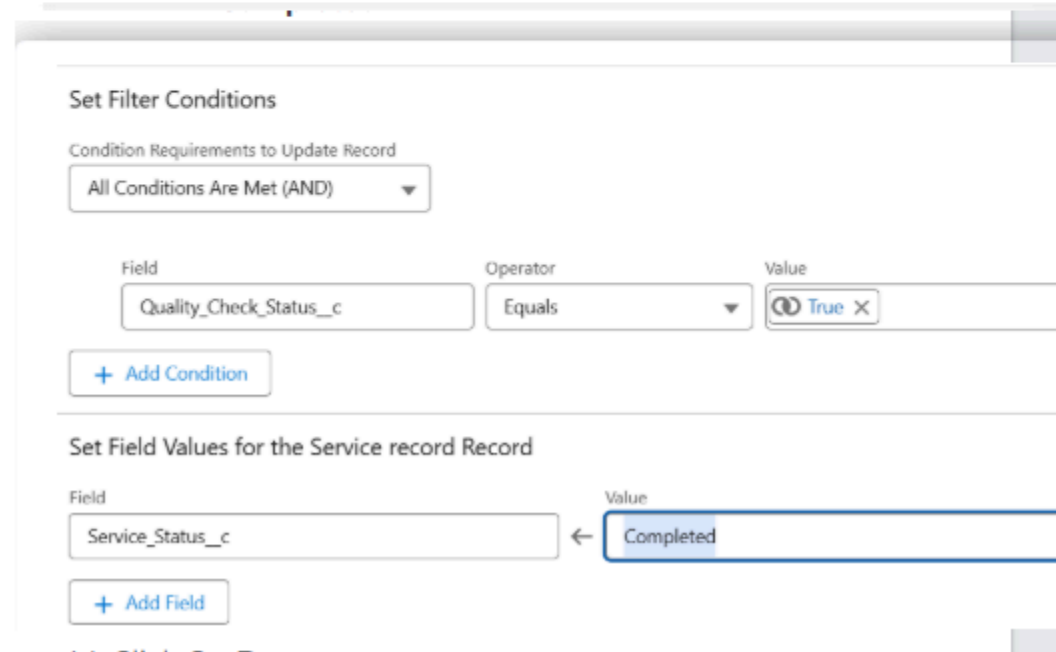
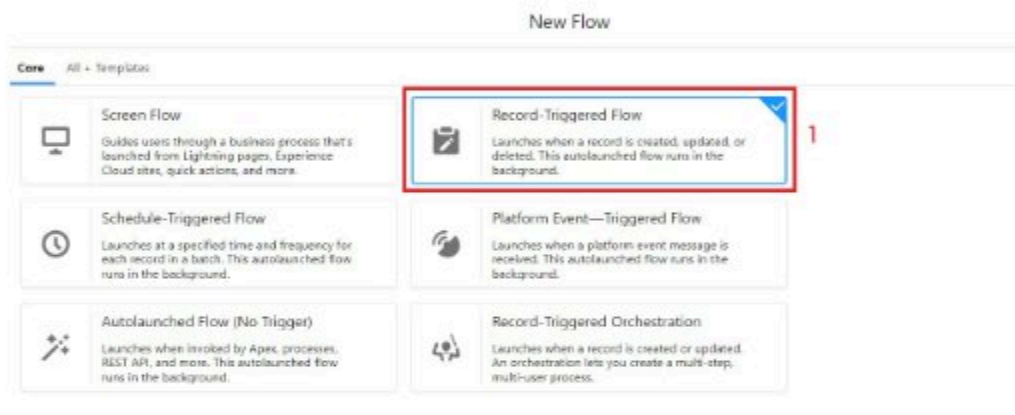
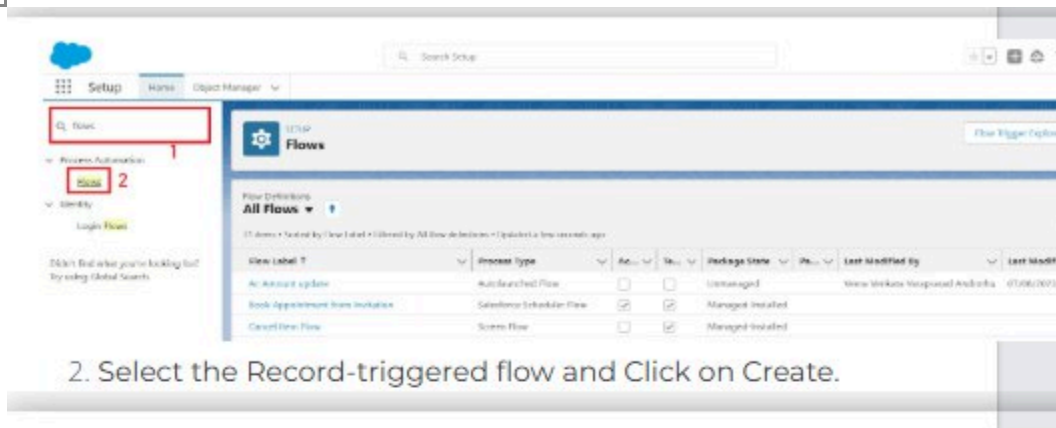
Description

Show Advanced

Cancel

Save





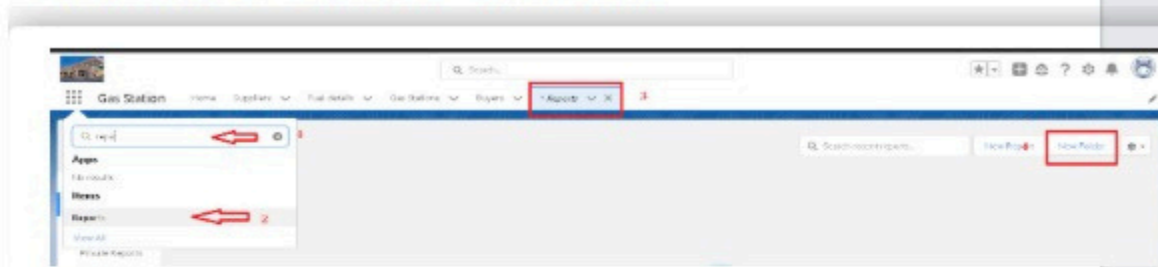
```
AmountDistribution.aspx | AmountDistributionHandler.aspx
Code Coverage: None | API Version: 1.0 | 30/10/2015

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            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 }
```

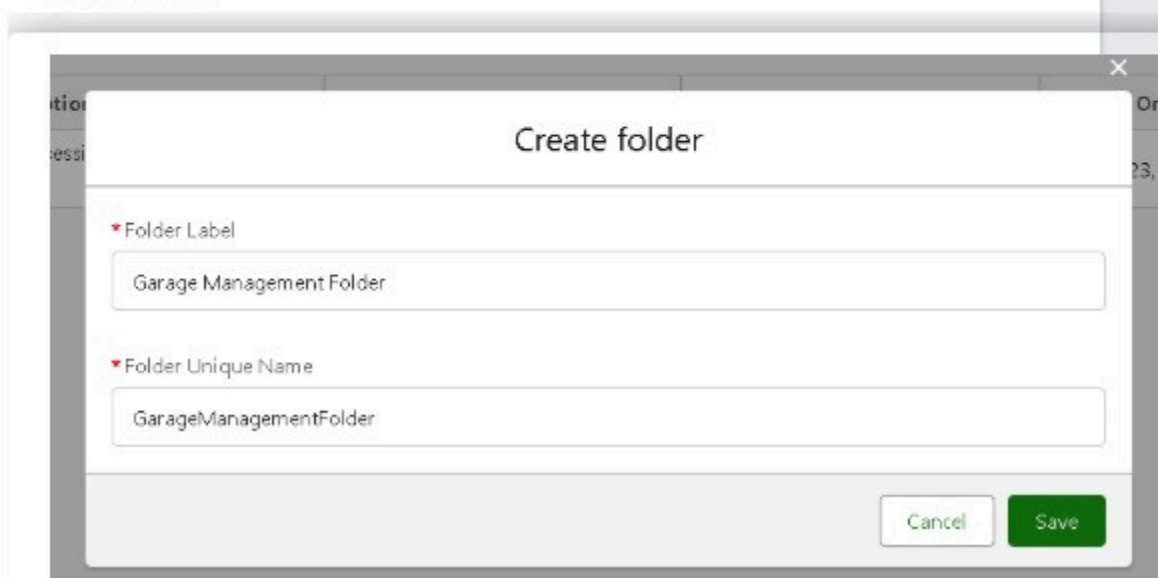
```
AmountDistribution.aspx | AmountDistributionHandler.aspx
Code Coverage: None | API Version: 1.0 | 30/10/2015

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 }
```

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.



Share folder

These sharing settings apply to all subfolders in this folder.

Share With

Roles

1

Names

Search Roles...



Manger X

2

Access

View

3

Share

4

Who Can Access



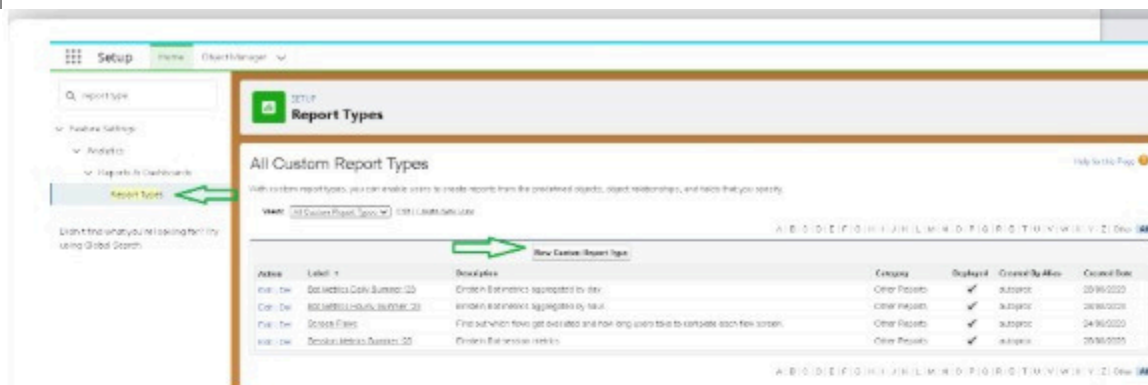
sunny 1
Users

Manage



5

Done



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.

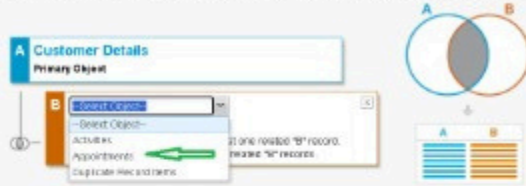
The screenshot shows the 'Report Type Focus' configuration page. It has a sub-header: 'Specify what type of records (rows) will be the focus of reports generated by this report type. Example: If reporting on "Contracts with Opportunities with Partners," select "Contracts" as the primary object.' Below this, there's a 'Primary Object' dropdown menu with 'Customer Details' selected (indicated by a green arrow). The 'Identification' section contains four fields: 'Report Type Label' (Service information, indicated by a green arrow), 'Report Type Name' (Service information, autopopulated), 'Description' (Service information), and 'Store in Category' (Other Reports, indicated by a green arrow). The 'Deployment' section at the bottom has a 'Deployment Status' radio button set to 'In Development'.

Step 2: Define Report Records Set

Step 2 of 2

Previous Save Cancel

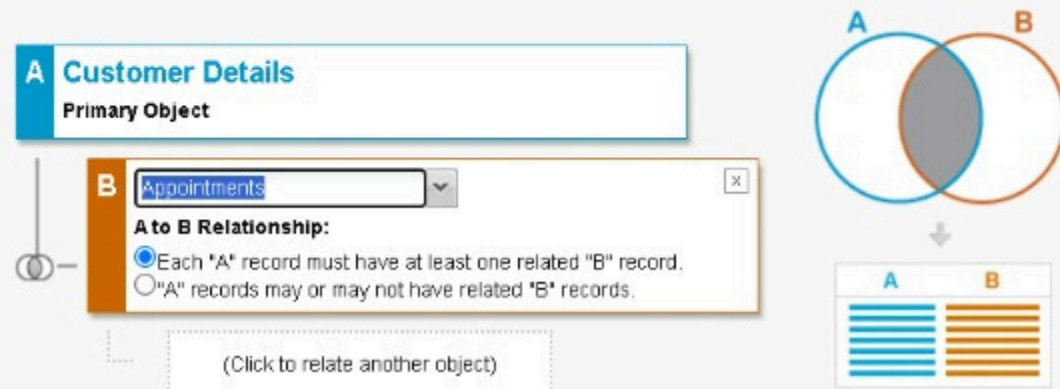
This report type will generate reports about Customer Details. You may define which related records from other objects are returned in report results by choosing a relationship to another object.



Previous Save Cancel

Step 2: Define Report Records Set

This report type will generate reports about Customer Details. You may define which related records from other objects are



Report Types

This report type will generate reports about Customer Details. You may define which related records from other objects are returned in report results by choosing a relationship to another object.

A Customer Details
Primary Object

B Appointments
A to B Relationship:
☒ Each "A" record must have at least one related "B" record.
☐ "A" records may or may not have related "B" records.

C Service records
B to C Relationship:
☒ Each "B" record must have at least one related "C" record.
☐ "B" records may or may not have related "C" records.

D Billing details and feedback
C to D Relationship:
☒ Each "C" record must have at least one related "D" record.
☐ "C" records may or may not have related "D" records.

Object Limit Reached
You can associate up to four objects to a custom report type.

Previous Save Cancel

Employee Manage...

Search...

Home Employees Assets Asset Service Projects ProjectInfo Reports Dashboards

Reports

Recent

Search recent reports... New Report New Folder

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Employee's working on project report	Private Reports	Employee Project	5/6/2021, 9:22 am		
Created by Me	Assets assigned to Employees	Private Reports	Employee Project	5/6/2021, 9:16 am		
Private Reports						
Public Reports						
All Reports						

PG. 2/2/21

3. Select the Category as other reports, search for Service Information, select that report, click on it. And click on start report.

Create Report

Category
Customer Support Reports

Leads

Campaigns

Activities

Locations and Orders

Price Quotes, Products and Assets

Administrative Reports

Risk and Content Reports

Individuals

Other Reports

Hidden Report Types

Select a Report Type

Report Type Name

Category

Service records	Standard
Service records with Appointments	Standard
Service records History	Standard
Billing details and feedback with Service records	Standard
Service information	Custom

Details

Service information
Custom Report Type

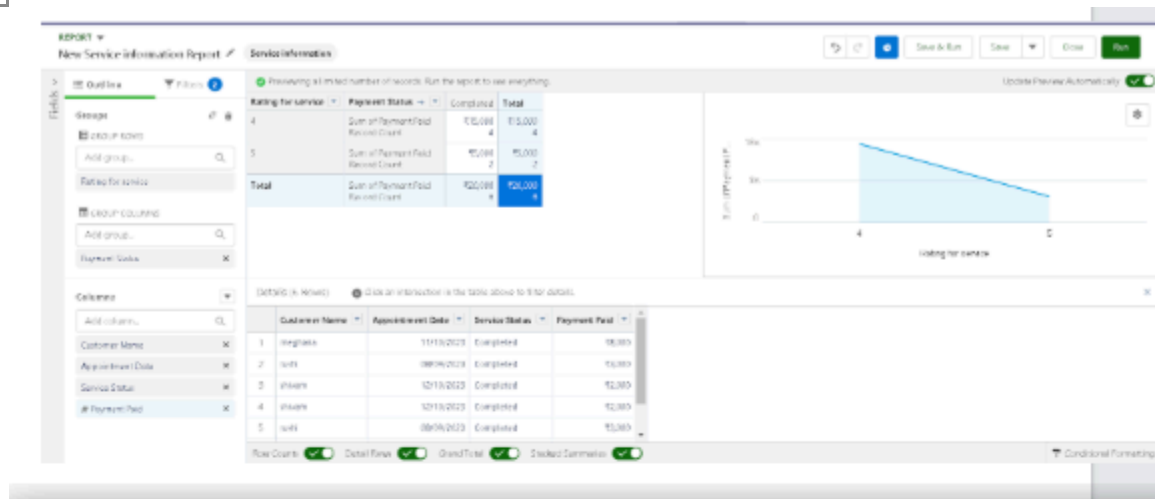
Start Report

Details

Description
Service information

Created By You
No Reports/Yes

Created By Others
No Reports/Yes



Save Report

* Report Name

New Service Information Report

Report Unique Name

New_Service_Information_Report_LoVu

Report Description

Folder

Garage Management Folder

Select Folder

Cancel Save

Create folder

* Folder Label

Service Rating

* Folder Unique Name

ServiceRating

Cancel Save

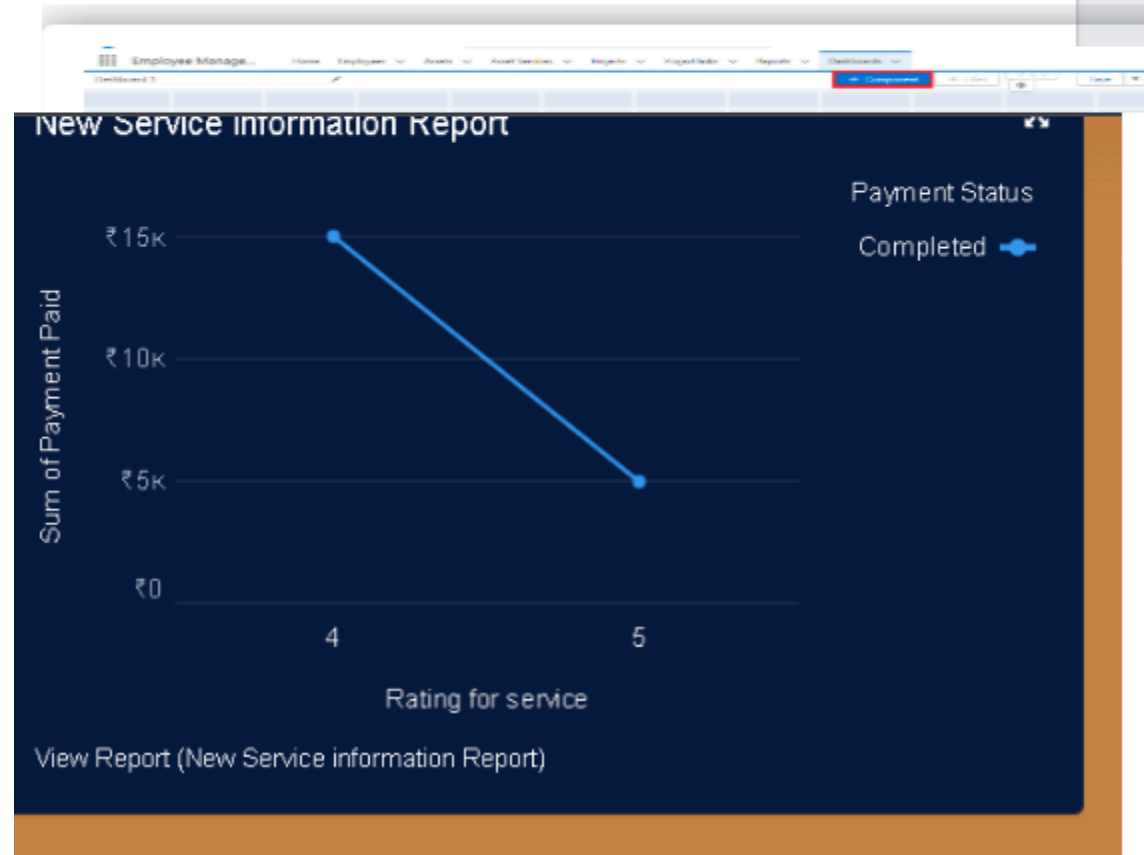
New Dashboard

*Name
Customer review

Description

Folder
Service Rating

3. Select add component.



Edit Subscription

Schedule dashboard refreshes and subscribe to receive results.

Settings

Frequency

☐ Daily ☒ Weekly ☐ Monthly

Days

☐ Sun ☒ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat

Time

3:00 pm

Recipients

☒ Receive new results by email when dashboard is refreshed. ⓘ

Send email to

Me


[Edit Recipients](#)

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

New Customer Detail

* = Required Information

Information

* Customer Name	Owner
Mac	 Annapurna SmartBridge
Phone number	
5678765567	
Gmail	
mac@gmail.com	

[Cancel](#) [Save & New](#) [Save](#)

Garage Manage...

Customer Details

Appointments

Service records

Billing details and feedback

Reports

Dashboard

Appointment

app-016

Appointment Name

app-016

Owner

Annapurna SmartBridge

Customer Details

Mac

* Appointment Date

13/11/2024

Maintenance service

☒

Repairs

☒

Replacement Parts

☐

Service Amount

* Vehicle number plate

TS30EU0443

Created by

Annapurna SmartBridge, 10/11/2024, 3:25 pm

Cancel

Save

Created by

Annapurna SmartBridge, 10/11/2024, 3:25 pm

* = Required Information

Information

Service Record Name

Owner

Annapurna SmartBridge

* Appointment

app-016

Quality Check Status

☐

Service Status

Started

Cancel

Save & New

Save

Service Record Name

ser-010

Owner

 Annapurna SmartBridge

* Appointment

 app-016 

Quality Check Status



Service Status

Started

service date

18/11/2024

This field is calculated upon save

Created By

Cancel

Save

ed By

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