

Salesforce Virtual Internship Program

SmartInternz

Garage management system

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PROJECT ABSTRACT

The Salesforce-based Garage Management System (GMS) is a sophisticated solution tailored for automotive repair facilities to elevate service quality, streamline operations, and cultivate enduring customer relationships. Leveraging Salesforce's powerful CRM capabilities, GMS offers an intuitive interface and comprehensive features, allowing garages to thrive in a competitive marketplace.

The system automates critical processes such as appointment scheduling, inventory management, billing, and customer communications. By integrating these functionalities within Salesforce, GMS ensures a seamless and satisfying experience for both customers and staff. This advanced solution empowers automotive repair businesses to deliver top-notch service, optimize workflows, and maintain a competitive edge.

INTRODUCTION

Running an automotive repair shop involves juggling many tasks, from scheduling appointments to managing inventory and billing customers. The Salesforce-based Garage Management System (GMS) is designed to make these tasks easier and more efficient.

This system uses Salesforce's powerful tools to help garages deliver better service and keep operations running smoothly. With GMS, repair shops can automate important tasks like booking appointments, tracking inventory, sending bills, and communicating with customers.

The user-friendly design of GMS ensures that both staff and customers have a pleasant experience. By using this system, garages can stay ahead of the competition, provide excellent service, and manage their business more effectively. GMS not only simplifies daily operations but also provides valuable insights to help make better business decisions.

Project title: Garage management system

- **Project Overview**

This project focuses on the development of a Salesforce-based application, “The Garage Management System”, a valuable tool for automotive repair facilities, helping them deliver top-notch service, increase operational efficiency, and build lasting customer relationships. With its user-friendly interface and powerful features, GMS empowers garages to thrive in a competitive market while ensuring a seamless and satisfying experience for both customers and staff.

The Garage Management System (GMS) developed on Salesforce is an innovative solution designed to optimize the operations of automotive repair facilities. By automating key processes and integrating various aspects of garage management into a single platform, GMS empowers businesses to operate more efficiently, deliver higher quality service, and build stronger customer relationships.

TASK 1:

1.1 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 :
 - First name & Last name
 - Email
 - Role : Developer
 - Company : College Name
 - County : India
 - 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
 - a) Click on sign me up after filling these.

1.2 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.

TASK 2:

- **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.

TASK 3:

- **Create Appointment Object**

- 1) From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
 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
- 4) Click on Allow reports and Track Field History,
- 5) Allow search >> Save.

TASK4:

- **Create Service records Object**

To create an object:

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

TASK 5:

- **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

- Click on Allow reports and Track Field History,
- Allow search >> Save.

TASK 6:

- 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)

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected in the top navigation bar. In the sidebar, 'Custom Tabs' is highlighted with a red box. The main content area displays a list of existing custom tabs, each with a name, icon, style, and a brief description. A red box highlights the 'New' button at the top right of this list.

- 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 .
- Make sure that the Append tab to users' existing personal customizations is checked.
- Click save.

New Custom Object Tab

Step 1. Enter the Details

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

Select an existing custom object or [create a new custom object now](#).

Object	Customer Details
Tab Style	[Select]

(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	—None—
-------------------------	--------

Enter a short description.

Description	[Text Area]
-------------	-------------

Step 1 of 3

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
	Heart[1]		Helicopter		Hexagon		Highway Sign
	Hot Air Balloon		Insect		IP Phone		Jewel
	Keys		Laptop		Leaf		Lightning

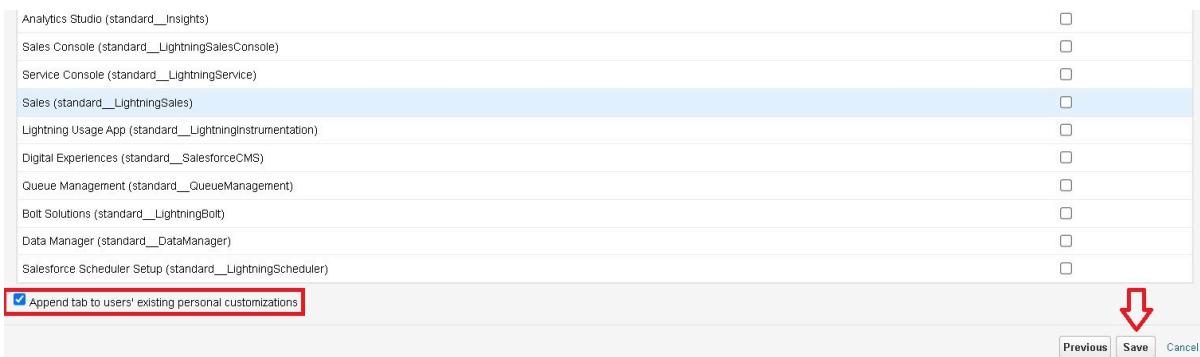
Save **Cancel**

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 Website User	<input type="checkbox"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>



TASK 7:

- **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

TASK8:

- **Create a Lightning App**

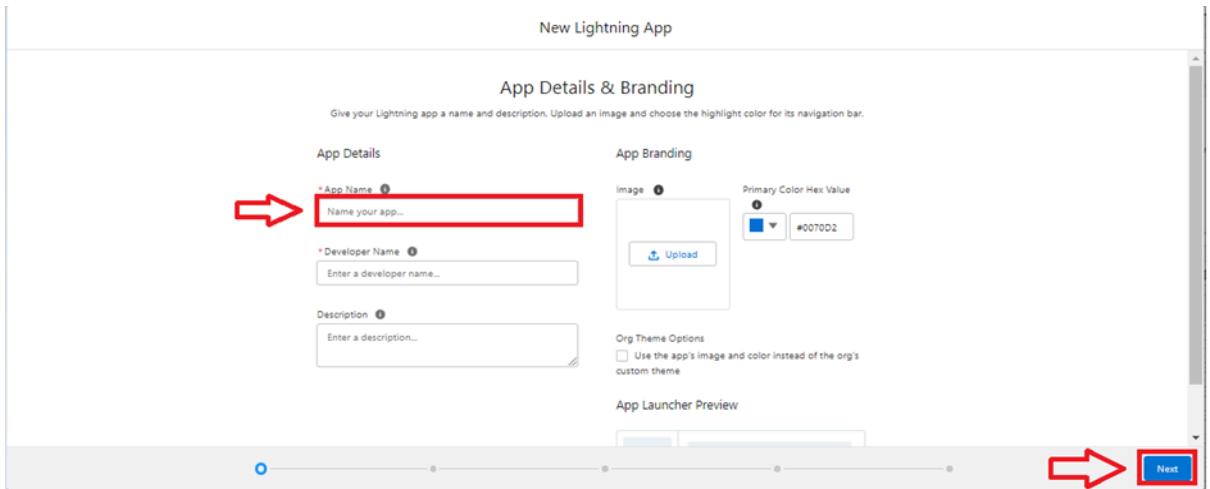
To create a lightning app page:

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

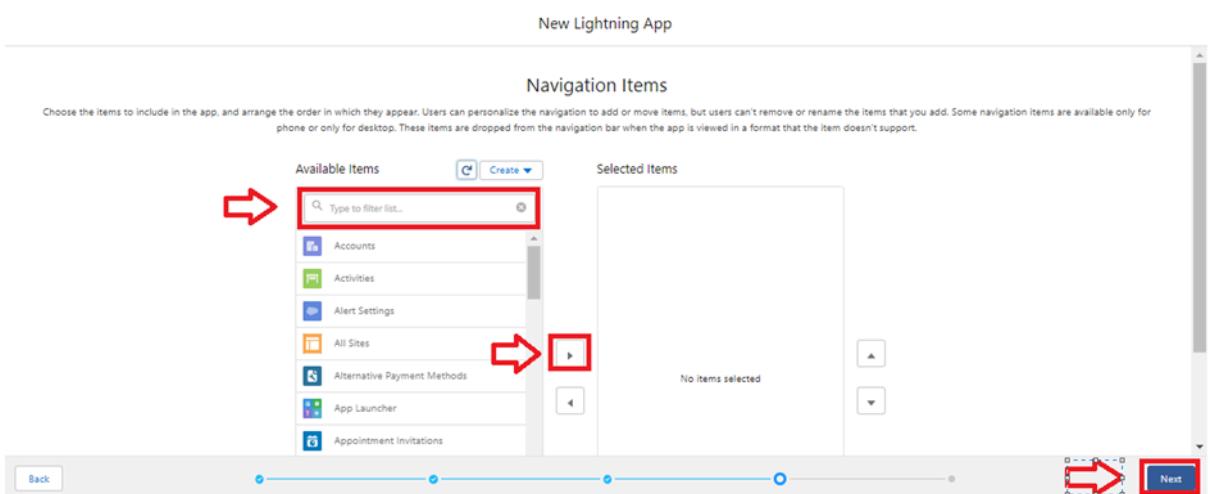
App Name	Developer Name	Description	Last Modified	Type
All Data	AllData	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic
Analytics Studio	Insights	Build CRM Analytics dashboards and apps	04/12/2022, 10:13 am	Classic
App Launcher	AppLauncher	App Launcher tab	04/12/2022, 10:13 am	Classic
Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	04/12/2022, 10:16 am	Lightning
Chatter Desktop	Chatter/Desktop	Chatter Desktop is an Adobe AIR-based desktop application that lets Chatter users stay connected...	29/12/2022, 4:04 pm	Connected (Managed)
Chatter Mobile for BlackBerry	ChatterForBlackBerry	The Salesforce.com Chatter Mobile app lets you access Chatter data on the go. Use it to view feed...	29/12/2022, 4:05 pm	Connected (Managed)
College Management System	Nadeem	demo app	08/12/2022, 4:18 pm	Lightning
Community	Community	Salesforce CRM Communities	04/12/2022, 10:13 am	Classic
Content	Content	Salesforce CRM Content	04/12/2022, 10:13 am	Classic
Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	04/12/2022, 10:13 am	Lightning

- 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.

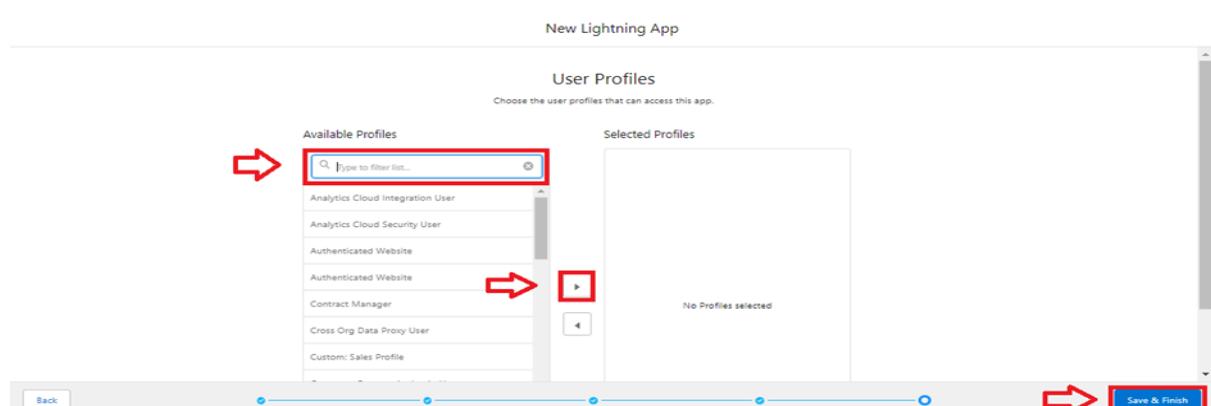


- To Add Navigation Items:



- 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.

TASK 9:

- Creation of fields for the Customer Details object

9.1. 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.

The screenshot shows the Salesforce Object Manager interface. At the top, there's a search bar with 'cus' typed in, a 'Schema Builder' button, and a 'Create' button. Below the header, a table lists objects: 'Customer' (Standard Object) and 'Customer Details' (Custom Object). The 'Customer Details' row is highlighted with a red border. The table columns include Label, API Name, Type, Description, Last Modified, and Deployed.

- Now click on “Fields & Relationships” >> New

The screenshot shows the 'Fields & Relationships' section for the 'Customer1' object. On the left, a sidebar lists various setup options like Page Layouts, Lightning Record Pages, etc. The main area shows a table of existing fields with columns: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. A red arrow points to the 'New' button at the top right of the table. Another red arrow points to the 'Customer1' object name at the top left.

- Select Data Type as a “Phone”

The screenshot shows the 'Fields & Relationships' section for the 'Customer1' object. The 'Data Types' dropdown is open, showing various options like Currency, Date, etc. The 'Phone' option is selected and highlighted with a red box. A red arrow points to the description text for the 'Phone' data type, which states: "Allows users to enter any phone number. Automatically formats it as a phone number."

- 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.

9.2. 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.

TASK 10:

- Creation of Lookup Fields

10.1 Creation of Lookup Field on Appointment Object :

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

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Appointment	Appointment__c	Custom Object		24/08/2023	✓
Appointment Category	AppointmentCategory	Standard Object			
Appointment Invitation	AppointmentInvitation	Standard Object			
Appointment Invitee	AppointmentInvitee	Standard Object			

- Now click on “Fields & Relationships” >> New

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

Note: Make sure you complete Activity 4 Before continuing.

10.2 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.

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

Lookup Filter

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

[Hide Filter Settings](#)

Filter Criteria [Insert Suggested Criteria](#)

Field	Operator	Value / Field
Appointment Appointment Date	less than	Field <input style="width: 20px; height: 20px;" type="button" value="..."/> Appointment Created Date <input style="width: 20px; height: 20px;" type="button" value="..."/> Clear
And <input type="text" value="Begin typing to search for a field..."/> <input style="width: 20px; height: 20px;" type="button" value="..."/> --None-- <input style="width: 20px; height: 20px;" type="button" value="..."/> Value <input style="width: 20px; height: 20px;" type="button" value="..."/> Clear		

[Add Filter Logic...](#)

Filter Type

- Required.** The user-entered value must match filter criteria.
If it doesn't, display this error message on save:
- Optional.** The user can remove the filter or enter values that don't match criteria.

Lookup Window Text

Active Enable this filter.

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

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

10.3 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.

TASK 11:

• Creation of Checkbox Fields

11.1 Creation of Checkbox Field on Appointment Object :

- 1) Go to setup >> click on Object Manager >> type object name(Appointment) in search bar >> click on the object.
- 2) Now click on “Fields & Relationships” >> New.
- 3) Select “Check box” as data type and click Next.

SETUP > OBJECT MANAGER
Appointment

Fields & Relationships

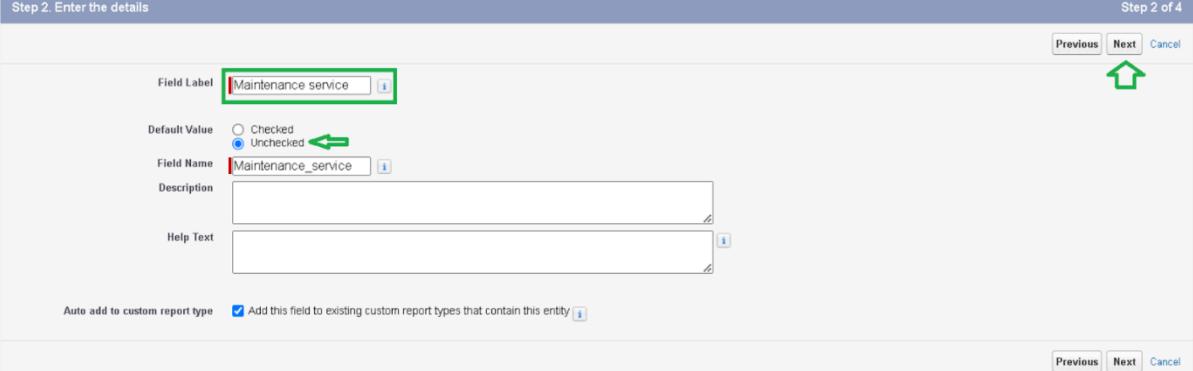
Details

Data Type

- None Selected
- Auto Number
- Formula
- Roll Up Summary
- Lookup Relationship
- Master Detail Relationship
- Checkbox
- External Lookup Relationship
- Currency

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

- Give the Field Label : Maintenance service
- Field Name : is auto populated
- Default value : unchecked



Step 2. Enter the details Step 2 of 4

Field Label 

Default Value Checked Unchecked 

Field Name 

Description

Help Text

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

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

- Click on next >> next >> save.

11.2 Creation of Another Checkbox Field on Appointment Object :

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

11.3 Creation of Checkbox Field on Service records Object :

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

TASK 12:

- **Creation of date Fields**
- **Creation of Date Field on Appointment Object :**

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

- 7) Click on next >> next >> save.

Appointment
New Custom Field

Step 2. Enter the details Step 2 of 4

Field Label i

Field Name i

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 i

Default Value Show Formula Editor

Previous Next Cancel

TASK 13:

- **Creation of Currency Fields**

13.1 Creation of Currency Field on Appointment Object :

- 1) Go to setup >> click on Object Manager >> type object name(Appointment) in the search bar >> click on the object.
- 2) Now click on “Fields & Relationships” >> New.
- 3) Select “Currency” as data type and click Next.
- 4) Give the Field Label : Service Amount
- 5) Field Nme : is auto populated

Step 2. Enter the details Step 2 of 4

Field Label i

Please enter the length of the number and the number of decimal places. For example, a number with a length of 8 and 2 decimal places can accept values up to "12345678.90".

Length Number of digits to the left of the decimal point

Decimal Places Number of digits to the right of the decimal point

Field Name i

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 i

Previous Next Cancel

- Click on next
- Give read only for all the profiles in field level security for profile.

Appointment
New Custom Field

Help for this Page 

Step 3. Establish field-level security Step 3 of 4

Previous Next Cancel

Field Label	Service Amounts
Data Type	Currency
Field Name	Service_Amounts
Description	

Select the profiles to which you want to grant edit access to this 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	Visible	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"/>



- Click on next >> save.

13..2 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

TASK 14:

14.1 Creation of Text Fields

- 1) Go to setup >> click on Object Manager >> type object name(Appointment) in the search bar >> click on the object.
- 2) Now click on “Fields & Relationships” >> New.
- 3) Select “Text” as data type and click Next.
- 4) Give the Field Label : Vehicle number plate
- 5) Field Name : is auto populated
- 6) Length : 10
- 7) Make field as Required and Unique.

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label	Vehicle number plate 
Please enter the maximum length for a text field below.	
Length	10
Field Name	Vehicle_number_plate 
Description	<input type="text"/>
Help Text	<input type="text"/>
Required	<input checked="" type="checkbox"/> Always require a value in this field in order to save a record
Unique	<input checked="" type="checkbox"/> Do not allow duplicate values <ul style="list-style-type: none"> <input checked="" type="radio"/> Treat “ABC” and “abc” as duplicate values (case insensitive) <input type="radio"/> Treat “ABC” and “abc” as different values (case sensitive)
External ID	<input type="checkbox"/> Set this field as the unique record identifier from an external system
Auto add to custom report type	<input checked="" type="checkbox"/> Add this field to existing custom report types that contain this entity 

- Click on next >> next >> save.

14.2 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.

TASK 15:

- **Creation of Picklist Fields**

15.1 Creation of Picklist Fields in Service records object :

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

15.2 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.

TASK 16:

Creating Formula Field in Service records Object

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

Step 2. Choose output type

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 Select one of the data types below.

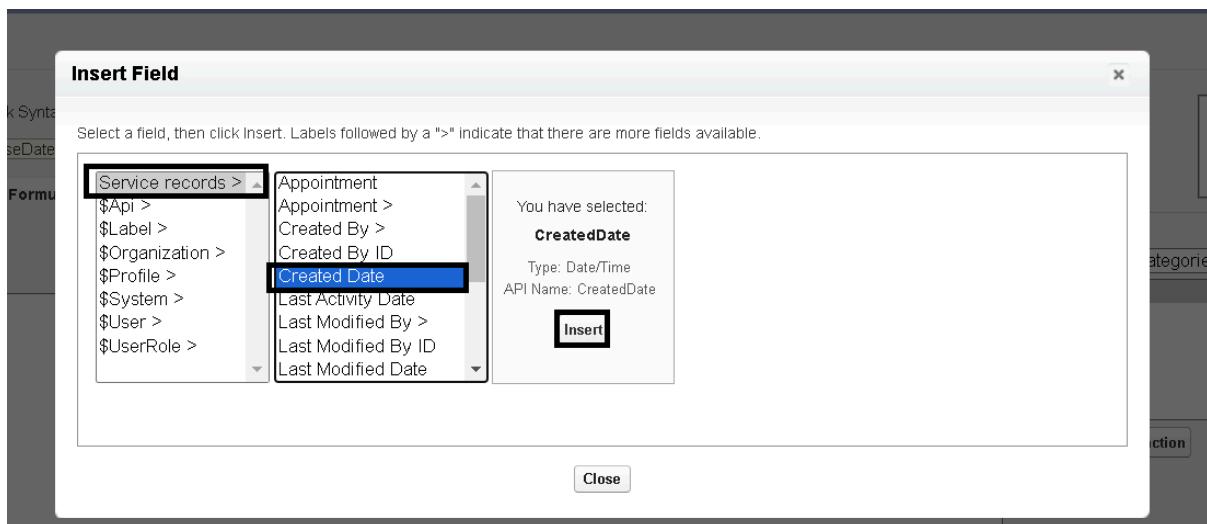
Checkbox Calculate a boolean value.
Example: `TODAY() > CloseDate`

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

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

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

- Insert field formula should be : CreatedDate



Step 3. Enter formula

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

Example: `Reminder Date = CloseDate - 7` [More Examples](#)

Simple Formula Advanced Formula

service dates (Date) = 

Insert Operator 

Functions 

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

 Quick Tips

- Getting Started
- Operators & Functions

- click “Check Syntax” .
- Click next >> next >> Save.

TASK 17:

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.

SETUP > OBJECT MANAGER
Appointment

Validation Rules

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Vehicle	Vehicle number plate	Please enter valid number	✓	project 2, 25/09/2023, 11:56 am

New

- Enter the Rule name as “ Vehicle ”.
- Insert the Error Condition Formula as :-

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

Validation Rule Edit

Rule Name: Vehicle

Active:

Description: vehicle

Error Condition Formula

Example: Discount_Percent__c>30 More Examples...

If this formula expression is true, display the text defined in the Error Message area

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

Functions

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

Insert Selected Function

ABS(number)
Returns the absolute value of a number, a number without its sign

Help on this function

Check Syntax

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

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is true

Error Message: 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

TASK 18:

- 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”.

The screenshot shows the 'Validation Rule Edit' screen. At the top, there are three buttons: 'Save', 'Save & New', and 'Cancel'. Below them, the 'Rule Name' field contains 'rating_should_be_less_than_5', which is highlighted with a red box. The 'Active' checkbox is checked. A 'Description' field is empty. On the right side, there is a 'Quick Tips' section with a link to 'Operators & Functions'. A note at the bottom right indicates that red boxes highlight required information.

- 4) Insert the Error Condition Formula as :-

NOT(REGEX(Rating_for_service_c , "[1-5]{1}"))

- 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.

The screenshot shows the 'Validation Rule Edit' screen with the 'Error Condition Formula' field containing 'NOT(REGEX(Rating_for_service_c , "[1-5]{1}"))', which is highlighted with a red box. Below it, the 'Error Message' field contains 'rating should be from 1 to 5', also highlighted with a red box. A dropdown menu on the right lists various functions like ACOS, ADDMONTHS, AND, ASCII, ASIN, etc. A 'Check Syntax' button is visible at the bottom left. A note at the bottom right says 'This error message can either appear at the top of the page or below a specific field on the page'.

TASK 19:

- 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.

The screenshot shows the 'Matching Rules' screen under the 'SETUP' tab. The top navigation bar includes 'Setup', 'Home', and 'Object Manager'. A search bar on the left has 'matching' typed into it. The main area is titled 'Matching Rules' and shows a table with columns: Action, Rule Name, Object, Status, Description, Last Modified Date, and Last Modified By. A green arrow points to the 'New Rule' button at the top right of the table. A note at the bottom left says 'Didn't find what you're looking for? Try using Global Search.' A note at the bottom right says 'Help for this Page'.

- Select the object as Customer details and click Next.

Matching Rule
New Matching Rule

Step 1: Select object Step 1 of 2

Select the object to which this matching rule applies.

Object: Customer Details

Next **Cancel**

- Give the Rule name : Matching customer details
- Unique name : is auto populated
- Define the matching criteria as
 - Field Matching Method
 - 1. Gmail Exact
- Phone Number Exact
 - Click save.
 - After Saving Click on Activate.

Save Cancel

Rule Details

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

Matching Criteria

Tell the rule which fields to compare and how.

Field	Matching Method	Match Blank Fields
Gmail	Exact	<input type="checkbox"/> AND
Phone Number	Exact	<input type="checkbox"/> AND
--None--	Exact	<input type="checkbox"/> AND
--None--	Exact	<input type="checkbox"/> AND
--None--	Exact	<input type="checkbox"/>

Add Filter Logic... **Save** **Cancel**

Matching Rule
matching Customer details

Help for this Page

Matching Rule Detail

Object: Customer Details
Rule Name: matching Customer details
Unique Name: matching_Customer_details
Description:
Matching Criteria: (Customer_Details: Gmail EXACT MatchBlank = FALSE) AND (Customer_Details: Phone_Number EXACT MatchBlank = FALSE)
Status: Inactive
Created By: project_2, 25/09/2023, 10:15 am
Modified By: project_2, 10/10/2023, 3:32 pm

Edit **Delete** **Clone** **Activate**

TASK 20:

- 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.

Rule Name	Description	Object	Matching Rule	Active	Last Modified By	Last Modified Date
Customer Detail duplicate	Identify accounts that duplicate other accounts.	Account	String Customer details	<input type="checkbox"/>	g2	10/10/2023
Standard Account Duplicate Rule	Identify contacts that duplicate other contacts and leads.	Appointment	Standard Account Matching Rule	<input checked="" type="checkbox"/>	g2	24/08/2023
Standard Contact Duplicate Rule	Identify leads that duplicate other leads and contacts.	Billing details and feedback	Standard Lead Matching Rule	<input checked="" type="checkbox"/>	g2	24/08/2023
Standard Lead Duplicate Rule		Contact	Standard Contact Matching Rule	<input checked="" type="checkbox"/>	g2	24/08/2023
		Environment	Standard Lead Matching Rule	<input checked="" type="checkbox"/>	g2	24/08/2023
		Individual	Standard Contact Matching Rule	<input checked="" type="checkbox"/>	g2	24/08/2023
		Laptop				
		Lead				

- Give the Rule name as : Customer Detail duplicate
- Scroll a little in Matching rule section
- Select the matching rule : Matching customer details
- And Click on save.
- After saving the Duplicate Rule, Click on Activate.

TASK 21:

- 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.

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

Profile Manager

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

Custom Profile ✓

Name	Manager
User License	Salesforce
Description	
Created By	sunny_1, 13/06/2023, 2:40 pm
Modified By	sunny_1, 13/06/2023, 2:40 pm

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

Custom App settings

Data Manager (standard_DataManager)	<input checked="" type="checkbox"/>	<input type="radio"/>
Digital Experiences (standard_SalesforceCMS)	<input checked="" type="checkbox"/>	<input type="radio"/>
Garage Management Application (Garage_Management_Application)	<input type="checkbox"/>	<input checked="" type="radio"/>
Laptop Hub (laptop_Hub)	<input type="checkbox"/>	<input type="radio"/>
(standard_ServiceConsole)	<input type="checkbox"/>	<input type="radio"/>
Service (standard_Service)	<input checked="" type="checkbox"/>	<input type="radio"/>
Service Console (standard_LightningService)	<input checked="" type="checkbox"/>	<input type="radio"/>
Site.com (standard_Sites)	<input checked="" type="checkbox"/>	<input type="radio"/>
Subscription Management (standard_RevenueCloudConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>

- 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.

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

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

TASK 22:

sales person Profile

- 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.
- While still on the profile page, then click Edit.
- Select the Custom App settings as default for the GArage management.
- 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 and click save.

TASK 22:

- Creating Manager Role

Creating Manager Role:

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

The screenshot shows the Salesforce Setup interface. The left sidebar has sections like 'Users', 'Sales', 'Feature Settings', 'Service', and 'Case Teams'. Under 'Sales', there are 'Contact Roles on Contracts' and 'Contact Roles on Opportunities'. Under 'Service', there is 'Case Team Roles'. The main area is titled 'Understanding Roles' with a sub-section 'Sample Role Hierarchy'. It shows a hierarchy from 'Executive Staff' down to 'Western Sales Rep' and 'Eastern Sales Rep'. A legend explains the icons: a person for View & edit data, a chart for View & generate reports, and a gear for Assign to other users. At the bottom right are 'Set Up Roles' and 'Don't show this page again' buttons.

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

This screenshot shows the 'Your Organization's Role Hierarchy' page. It lists roles under 'Nick Enterprises': CFO, HR, Manager, On Site Emp, and Remote Emp. Each role has an 'Add Role' button next to it. The 'Manager' role is expanded to show its sub-roles: On Site Emp and Remote Emp, each with its own 'Add Role' button. The 'Add Role' button for the 'Manager' role itself is also highlighted with a red box.

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

This screenshot shows the 'Role Edit' page. The 'Label' field is filled with 'Manger' and has a red arrow pointing to it. The 'Role Name' field is also 'Manger'. The 'This role reports to' dropdown is set to 'CEO'. At the bottom, there are 'Save', 'Save & New', and 'Cancel' buttons, with a red arrow pointing to the 'Save' button.

TASK 23:

- Creating another roles

Creating another two roles under manager

- Go to quick find >> Search for Roles >> click on set up roles.
- Click plus on CEO role, and click add role under manager.

This screenshot shows the 'Your Organization's Role Hierarchy' page for 'Thesmartbridge'. The 'CEO' role is circled in red. Under the 'Manager' role, there is an 'Add Role' button which is also highlighted with a red box. Other visible roles include CFO, COO, SVP, Customer Service & Support, SVP, Human Resources, and SVP, Sales & Marketing.

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

TASK 24:

Create User

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

New User

User Edit

Save Save & New Cancel

General Information

Required Information

First Name	Niklaus	Role	Manger
Last Name	Mikaelson	User License	Salesforce
Alias	nmika	Profile	Manager
Email		Active	<input checked="" type="checkbox"/>
Username	Mikaelson@Niklaus	Marketing User	
Nickname	nik	Offline User	
Title		Knowledge User	
Company		Flow User	
Department		Service Cloud User	
Division		Site.com Contributor User	
		Site.com Publisher User	
		WDC User	
		Data.com User Type	

- Save.

TASK 25:

- **creating another users**

- 1) Repeat the steps and create another user using
 - a) Role : sales person
 - b) User licence : Salesforce Platform
 - c) Profile : sales person

Note : create atleast 3 users with these permissions.

TASK 26:

Creating New Public Group

1. Go to setup >> type users in quick find box >> select public groups >> click New.

- Give the Label as “sales team”.
- Group name is autopopulated.
- Search for Roles.
- In Available Members select Sales person and click on add it will be moved to selected member.
- Click on save.

TASK 27:

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.

- Click on save and refresh.
- Scroll down a bit, Click new on Service records sharing Rules.
-

Service records Sharing Rules New Recalculate Service records Sharing Rules Help ?

No sharing rules specified.

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

Sharing Settings

You can use sharing rules only to grant wider access to data, not to restrict access. ! = Required Information

Step 1: Rule Name

Label: sharing settings
Rule Name: sharing_settings (highlighted)

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: Roles (highlighted) | Sales person (highlighted)

Step 4: Select the users to share with

Share with: Roles (highlighted) | Manager (highlighted)

Step 5: Select the level of access for the users

Access Level: Read/Write (highlighted)

(highlighted) Save Cancel

TASK 28:

- Create a Flow

- 1) Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.

Setup Home Object Manager

Search Setup

Q flows 1

Process Automation 2

Flows 2

Identity

Login Flows

Didn't find what you're looking for?
Try using Global Search.

Flows

Flow Trigger Explorer New Flow 3

Flow Label	Process Type	Ac...	Te...	Package State	Pa...	Last Modified By	Last Modified ...
Ac Amount update	Autolaunched Flow	<input type="checkbox"/>	<input type="checkbox"/>	Unmanaged	Veera Venkata Varaprasad Androthu	07/06/2023, 11:35 am	
Book Appointment from Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Change Case Owner to Incident Owner	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Close Change Request & Related Issues	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			

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

New Flow

Core All + Templates

- Screen Flow
- Record-Triggered Flow
- Schedule-Triggered Flow
- Platform Event—Triggered Flow
- Autolaunched Flow (No Trigger)
- Record-Triggered Orchestration

Create

- Select the Object as “Billing details and feedback” in the Drop down list.
- Select the Trigger Flow when: “A record is Created or Updated”.
- Select the Optimize the flow for: “Actions and Related Records” and Click on Done.

Configure Start

Select Object

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

*Object: Billing details 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

Done

- Under the Record-triggered Flow Click on “+” Symbol and In the Drop down List select the “Update records Element”.

Record-Triggered Flow Start

Run Immediately

Add Element

Search...

Collection Sort

Collection Filter

Data

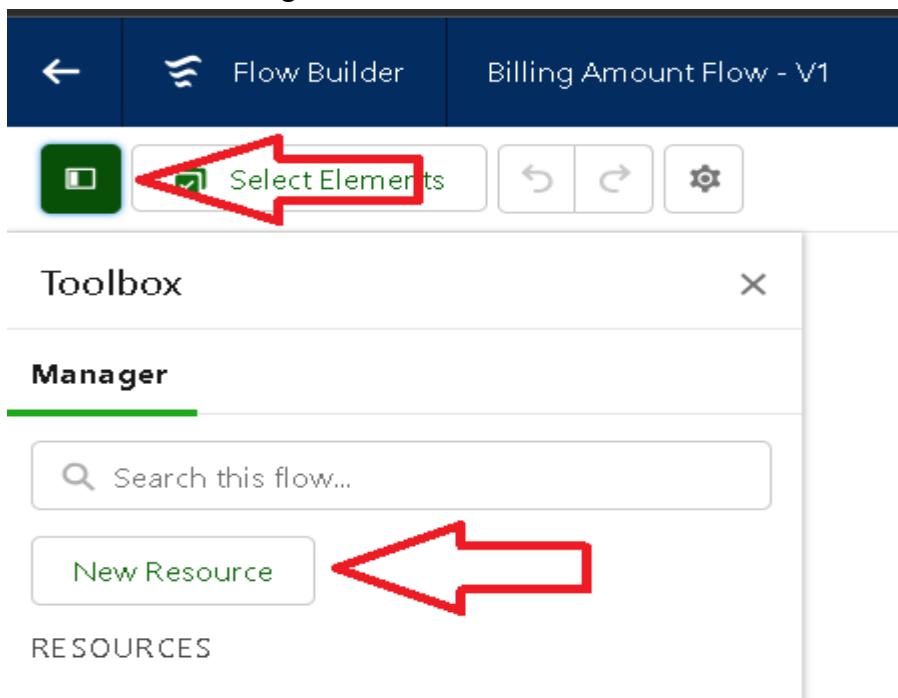
Create Records

Update Records

Get Records

Delete Records

- Give the Label Name : Amount Update
- Api name : is auto populated
- Set a filter condition : All Conditions are met(AND)
- Field : Payment_Status__c
- Operator : Equals
- Value : Completed
- And Set Field Values for the Billing details and feedback Record
- Field : Payment_Paid__c
- Value : {!\$Record.Service_records__r.Appointment__r.Service_Amount__c}
- Click On Done.
- Before creating another Element. Create a New Resource form Toolbox form top left.



- Click on the New Resource, And select Variable.
- Select the resource type as text template.
- Enter the API name as “ alert”.
- Change the view as Rich Text ? View to Plain Text.
- In body field paste the syntax that given below.

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

Amount paid : {!\$Record.Payment_Paid__c}

Thank you for Coming .

- Click done.

Edit Text Template

* API Name alert	Description
* Body <small>(1)</small>	
Insert a resource...	View as Plain Text <small>(▼)</small>
Dear {!\$Record.Service_records__r.Appointment__r.Customer_Name__r.Name}, 	
<input type="button" value="Cancel"/> <input type="button" value="Done"/>	

- Now Click on Add Element , select Action.
- Their action bar will be opened in that search for “ send email ” and click on it.
- Give the label name as “ Email Alert”
- API name will be auto populated.
- Enable the body in set input values for the selected action.
- Select the text template that created , Body : {!alert}
- Include recipient address list select the email form the record.
- RecipientAddressList:
{!\$Record.Service_records__r.Appointment__r.Customer_Name__r.Gmail__c}
- Include subject as “ Thank You for Your Payment - Garage Management”.
- Click done.

Edit Action

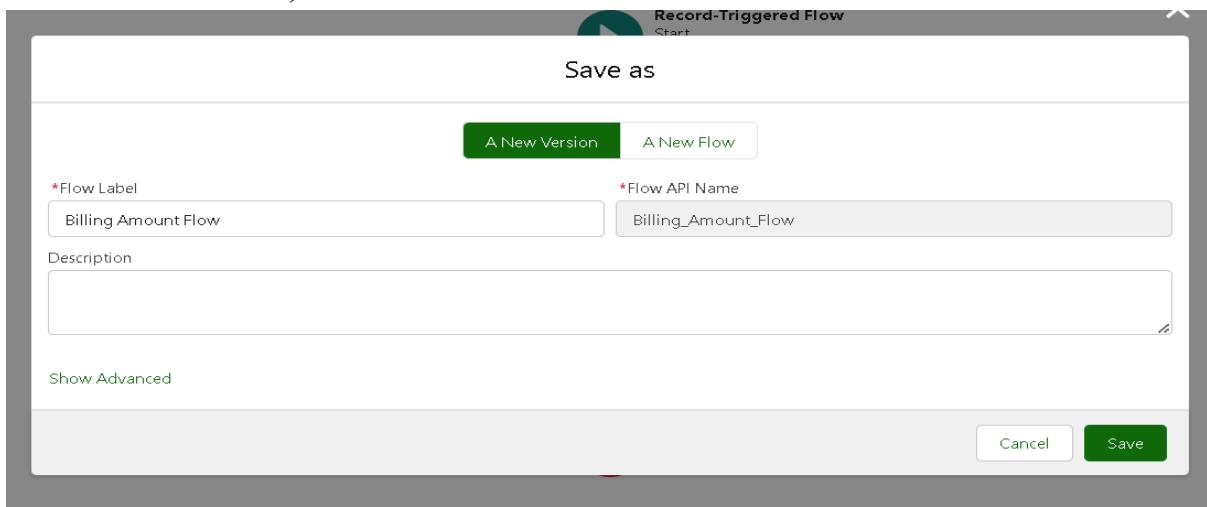
Use values from earlier in the flow to set the inputs for the "Send Email" core action. To use its outputs later in the flow, store them in variables.

* Label Email Alert	* API Name Email_Alert
Description	
Set Input Values for the Selected Action	
Aa Body <small>(1)</small> {!alert}	<input checked="" type="checkbox"/> Include
Aa Email Template ID	<input type="checkbox"/> Don't Include
Aa Log Email on Send	<input type="checkbox"/> Don't Include

Edit Action

Aa Recipient Address List <small>(1)</small> {!\$Record.Service_records__r.Appointment__r.Cus}	<input checked="" type="checkbox"/> Include
Aa Recipient ID	<input type="checkbox"/> Don't Include
Aa Related Record ID	<input type="checkbox"/> Don't Include
Aa Rich-Text-Formatted Body	<input type="checkbox"/> Don't Include
Aa Sender Email Address	<input type="checkbox"/> Don't Include
Aa Sender Type	<input type="checkbox"/> Don't Include
Aa Subject <small>(1)</small> Thank You for Your Payment - Garage Manageme	<input checked="" type="checkbox"/> Include
<input type="button" value="Cancel"/> <input type="button" value="Done"/>	

- Click on save. Give the Flow label , Flow Api name will be autopopulated.
- And click save, and click on activate.



TASK 30:

- **Apex handler**

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

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

```

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 }

```

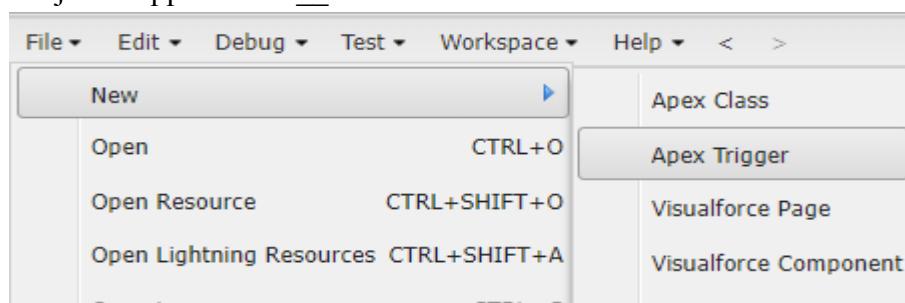
Code:

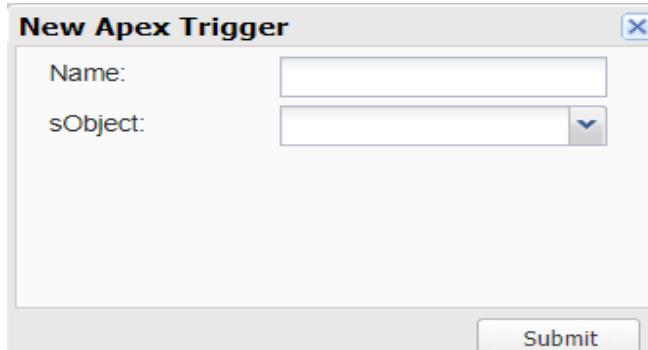
```
public class AmountDistributionHandler {  
    public static void amountDist(list<Appointment__c> listApp){  
        list<Service_records__c> serList = new list <Service_records__c>();  
  
        for(Appointment__c app : listApp){  
            if(app.Maintenance_service__c == true && app.Repairs__c == 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

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

Code:

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

TASK 31:

- **Sharing a report folder**

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

TASK 32:

Create Report Type

- 1) Go to setup >> type users in quick find box >> select Report Type >> click on Continue.
- 2) Click on new custom report type.

The screenshot shows the Salesforce Setup interface with the 'Report Types' page selected. The left sidebar has a tree view with 'Feature Settings' expanded, showing 'Analytics' and 'Reports & Dashboards'. Under 'Reports & Dashboards', 'Report Types' is highlighted with a green arrow. The main content area displays a grid of 'All Custom Report Types'. At the top right of this grid is a 'New Custom Report Type' button, also highlighted with a green arrow. The grid lists several report types with columns for Action, Label, Description, Category, Deployed, Created By Alias, and Created Date.

- Select the Primary object as “Customer details”.
- Give the Report type Label as “Service information”
- Report type Name is autopopulated.
- Keep the Description as same.
- Select Store in Category as “other Reports”
- Select the deployment status as “Deployed”, click on Next.

The screenshot shows the 'Create Report Type' wizard. The first step, 'Report Type Focus', asks to specify the primary object. The 'Primary Object' dropdown is set to 'Customer Details'. The second step, 'Identification', includes fields for 'Report Type Label' (set to 'Service information'), 'Report Type Name' (set to 'Service_information'), 'Description' (set to 'Service information'), and 'Store in Category' (set to 'Other Reports'). The third step, 'Deployment', shows 'Deployment Status' with 'In Development' selected, which is then changed to 'Deployed' (highlighted with a green arrow). The final step, 'Next', is shown with a green arrow pointing to it.

- now , Click on Related object box.
- Click on Select Object, choose Appointment Object as shown in fig.

New Custom Report Type
Service information

Step 2. Define Report Records Set Step 2 of 2

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 Select Object:

- Activities
- Appointments
- Duplicate Record Items

Each "A" record must have at least one related "B" record.
"A" records may or may not have related "B" records.

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 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.

(Click to relate another object)

- Again Click to relate another object.
- And select the related object as “ service records”.
- Repeat the process and select the related object as “ Billing details and feedback”.
- And click on save.

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

TASK 33:

- Create Report

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

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

- 1) Go to the app >> click on the reports tab
- 2) Click New Report.

Employee Manage... Home Employees Assets Asset Services Projects ProjectTasks Reports Dashboards

REPORTS Recent 2 Items

	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Employee's working on projects report	Private Reports	Employee Project	5/6/2023, 9:33 am		
Created by Me	Assets assigned to Employees	Private Reports	Employee Project	5/6/2023, 9:36 am		
Private Reports						
Public Reports						
All Reports						

FOLDERS

- 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
- Contracts and Orders
- Price Books, Products and Assets
- Administrative Reports
- File and Content Reports
- Individuals
- Other Reports**
- Hidden Report Types

Select a Report Type

Report Type Name Category

- Service records Standard
- Service records with Appointment Standard
- Service records History Standard
- Billing details and feedback with Service records Standard
- Service information Custom**

Details

Service information Custom Report Type

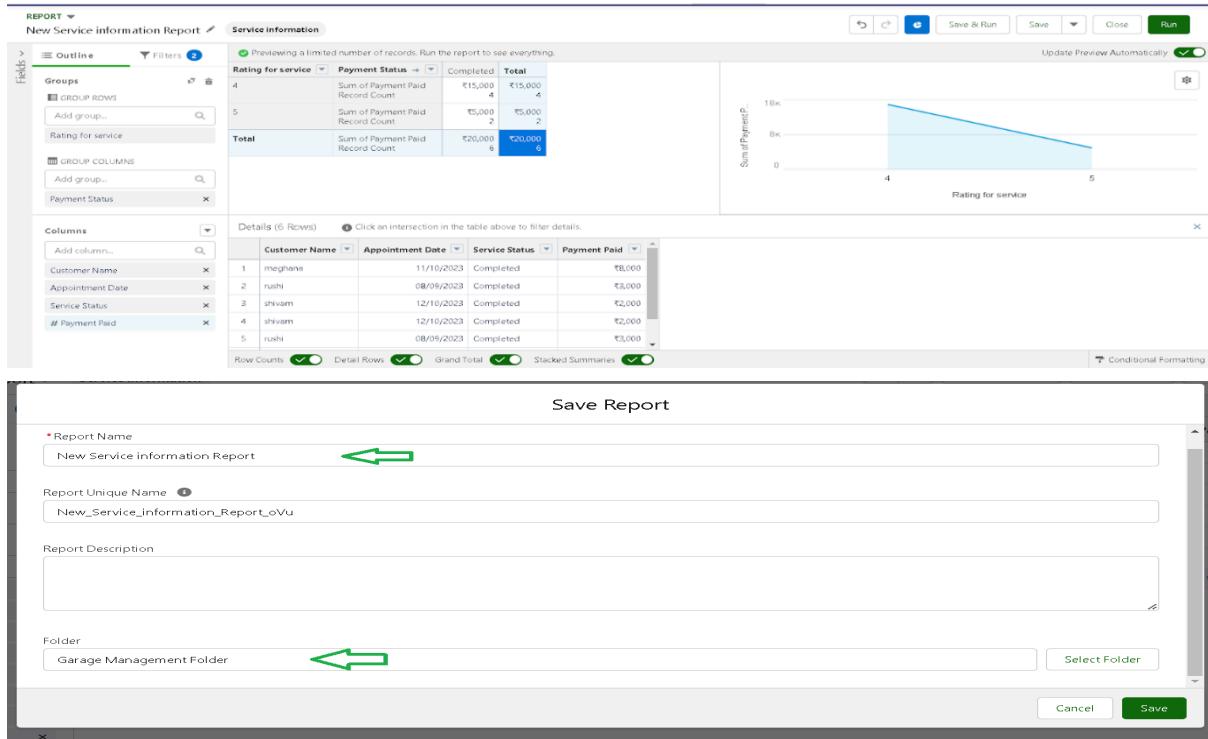
Start Report

Description Service information

Created By You No Reports Yet

Created By Others No Reports Yet

- Their outline pane is opened already, select the fields that mentioned below in column section.
 - a. Customer name
 - a. Appointment Date
 - a. Service Status
 - a. Payment paid
- Remove the unnecessary fields.
- Select the fields that mentioned below in GROUP ROWS section.
 - o Rating for Service
- Select the fields that mentioned below in GROUP ROWS section.
 - o Payment Status
- Click on Add Chart , Select the Line Chart.
- Click on save, Give the report Name : New Service information Report
- Report unique Name is auto populated.
- Select the folder the created and Click on save.



TASK 34:

Create Dashboard Folder

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

Create folder

* Folder Label
Service Rating

* Folder Unique Name
ServiceRating

Cancel Save

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

TASK 35:

- Create Dashboard**

- Go to the app >> click on the Dashboards tabs.
- Give a Name and select the folder that created, and click on create.

New Dashboard

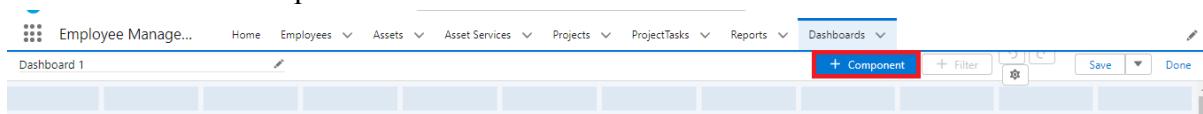
* Name
Customer review

Description

Folder
Service Rating Select Folder

Cancel Create

- Select add component.



- Select a Report and click on select.

Select Report

Reports Recent
Created by Me
Private Reports
Public Reports
All Reports

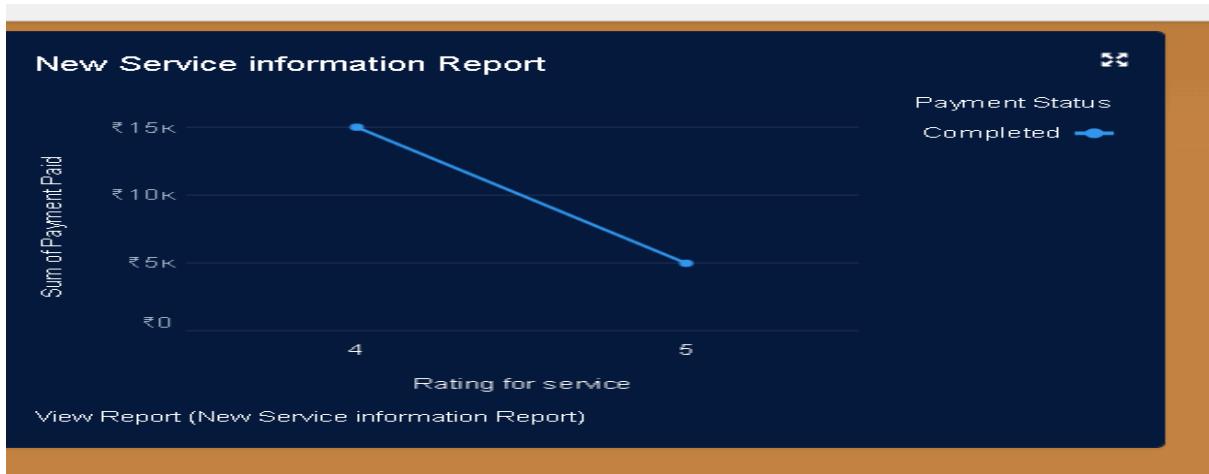
Folders
Created by Me
Shared with Me

Search Reports and Folders...
New Service Information Report
project 2 - 16-Oct-2023, 3:20 pm - Garage Management Folder

← Select

- Select the Line Chart. Change the theme.
- Click Add then click on Save and then click on Done.

- Preview is shown below.



- After that Click on Subscribe on top right.
- Set the Frequency as “ weekly ”.
- Set a day as monday.
- And Click on save.

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 ↓

TASK 36:

- 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.

New Customer Detail

* = Required Information

Information

* Customer Name: Mac

Phone number: 5678765567

Gmail: mac@gmail.com

Owner: Annapurna SmartBridge

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.

The screenshot shows the 'Appointments' tab in the Garage Management system. An appointment record named 'app-016' is open. The 'Customer Details' section shows 'Mac'. The 'Maintenance service' and 'Repairs' checkboxes are checked. The 'Service Amount' field is empty. The 'Vehicle number plate' field contains 'TS30EU0443'. The record was created by 'Annapurna SmartBridge' on 16/11/2024 at 3:26 pm. The 'Owner' is listed as 'Annapurna SmartBridge'.

Now, Create a service Record

- Click on the “Service record tab”.
- Enter the Appointment, and started is selected as default.
- Click on save.

The screenshot shows the 'New Service record' dialog. The 'Information' tab is selected. The 'Service Record Name' field contains 'app-016'. The 'Owner' is listed as 'Annapurna SmartBridge'. The 'Quality Check Status' checkbox is unchecked. The 'Service Status' dropdown is set to 'Started'. The dialog includes a note: '* = Required Information'.

- Open the record and click on Quality check status as true.
- Click on save.
- Now automatically Service status will be moved to completed.

Conclusion

By leveraging the Salesforce platform, the project successfully established a streamlined and transparent system for garage management. The salesforce-based garage management system simplifies and streamlines the operations of a running and auto repair shop. By automating tasks such as appointment scheduling, inventory tracking, billing and customer communication, the system enhances efficiency and improves the overall user experience for both staff and customers.