GARAGE MANAGEMENT SYSTEM

Project Report

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Project Abstraction

The Garage Management System is a web-based tool designed to manage and track all garage operations. The system aims to provide a centralized platform for garage owners to monitor and control their business activities, including employee management, inventory tracking, and customer service

The system is built on the Salesforce platform, which provides a robust and secure infrastructure for managing and storing data. The Salesforce platform also offers a wide range of tools and features that can be used to customize and extend the system to meet the specific needs of the garage business.

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

The Garage Management System also includes a customer service module, which allows garage owners to keep track of all their customers and their interactions with the garage. The system provides tools for managing customer information, such as contact details and service history, as well as tools for scheduling appointments and tracking customer feedback.

INDEX PAGE

TASKS	PAGE
INTRODUCTION	4
1.Creating Developer Account	4
2.Creating the Objects	7
3.Create the tabs	10
4.Create the lighting app	12
5.Create the Fields	13
6.Validation Rules	20
7.Duplicate Rules	22
8.Profiles	24
9.Role & Role Hierarchy	25
10.Users	26
11.Public Groups	27
12.Share Settings	28
13.Flows	28
14.Apex Trigger	30
15.Reports	32
16.DashBoard	35

INTRODUCTION

The Garage Management System is a comprehensive solution designed to optimize the usage of vehicles and trailers that carry inventories to stores. The system aims to streamline the management of vehicle records, track vehicles, and ensure efficient inventory transportation.

The Garage Management System will be built on the Salesforce platform, leveraging its robust architecture and scalability. The system will consist of several components, including vehicle records, inventory management, workflow automation, and integration with other Salesforce modules.

The abstraction framework for the system will use an Integration Procedure to get input from a workflow, query the product model based on that input, and update products, attributes, and inventory levels

The Garage Management System will provide a flexible and scalable architecture for managing and optimizing inventor y transpor tation, ensuring efficient vehicle utilization, and automating business processes.

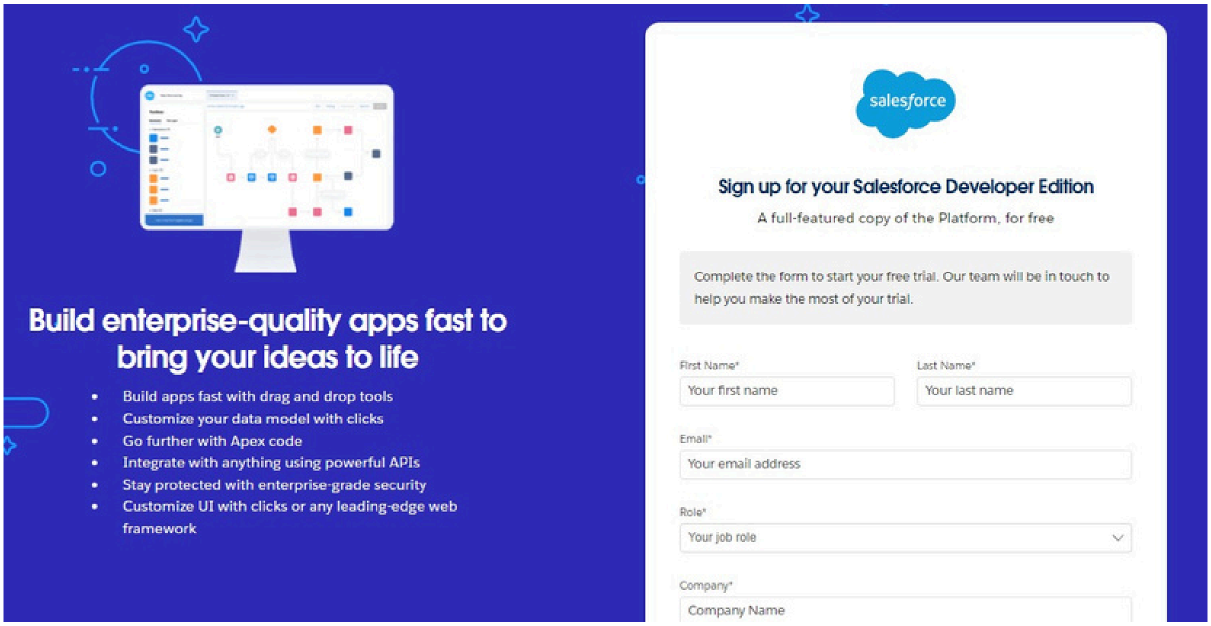
TASK 1:

Creating Developer Account:

Creating a developer org in salesforce.

1. Go to https://developer.salesforce.com/signup

2. lick on the sign up form



enter the following details :

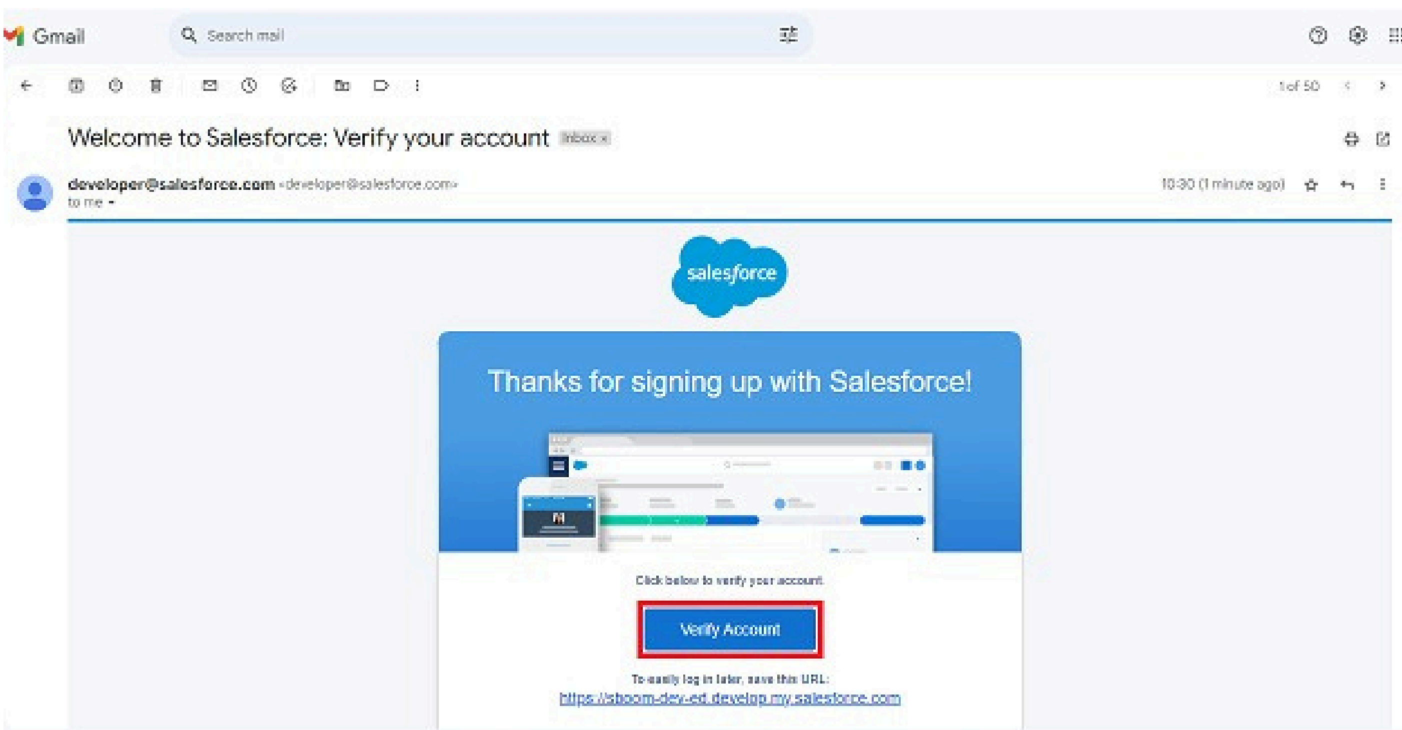
1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

This need not be an actual email id, you can give anything in the format : username@organization.com

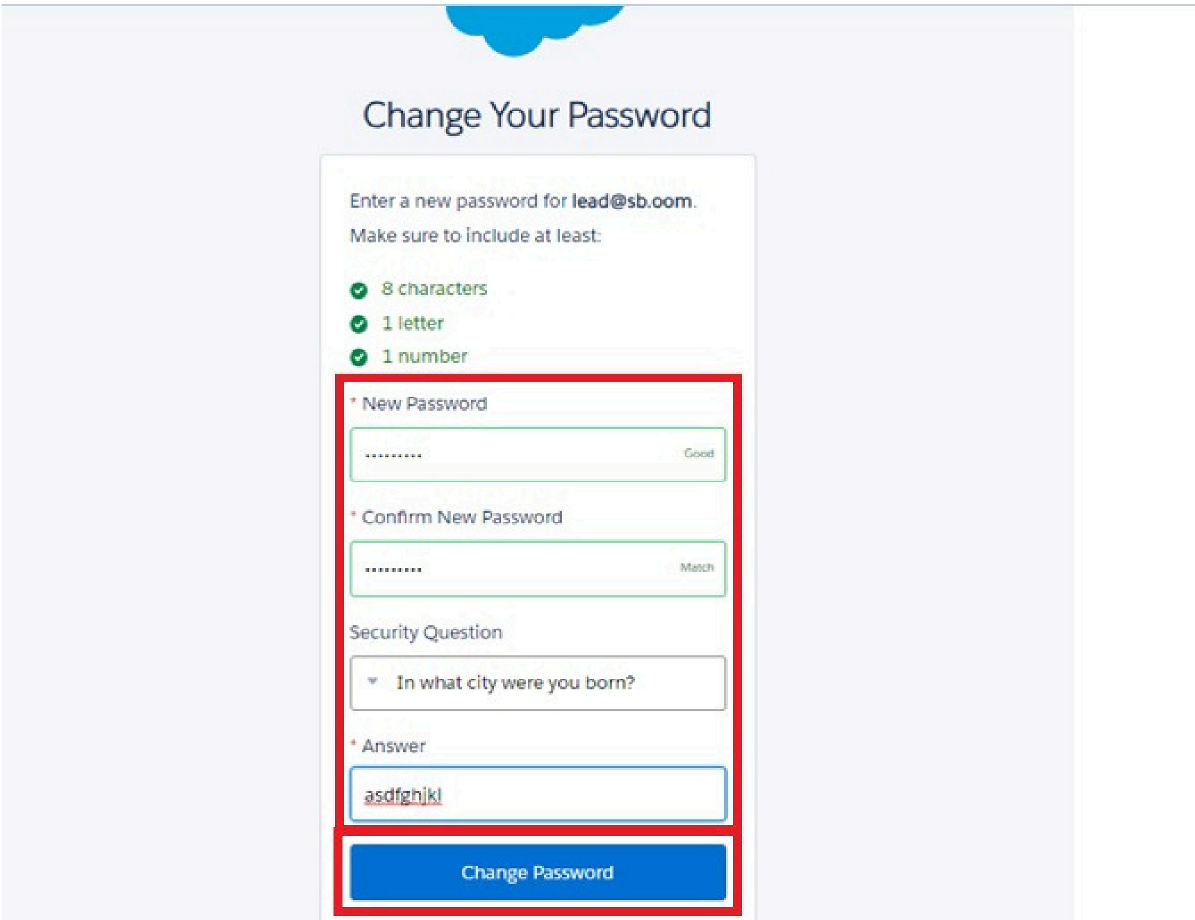
Click on sign me up after filling these.

Account Activation

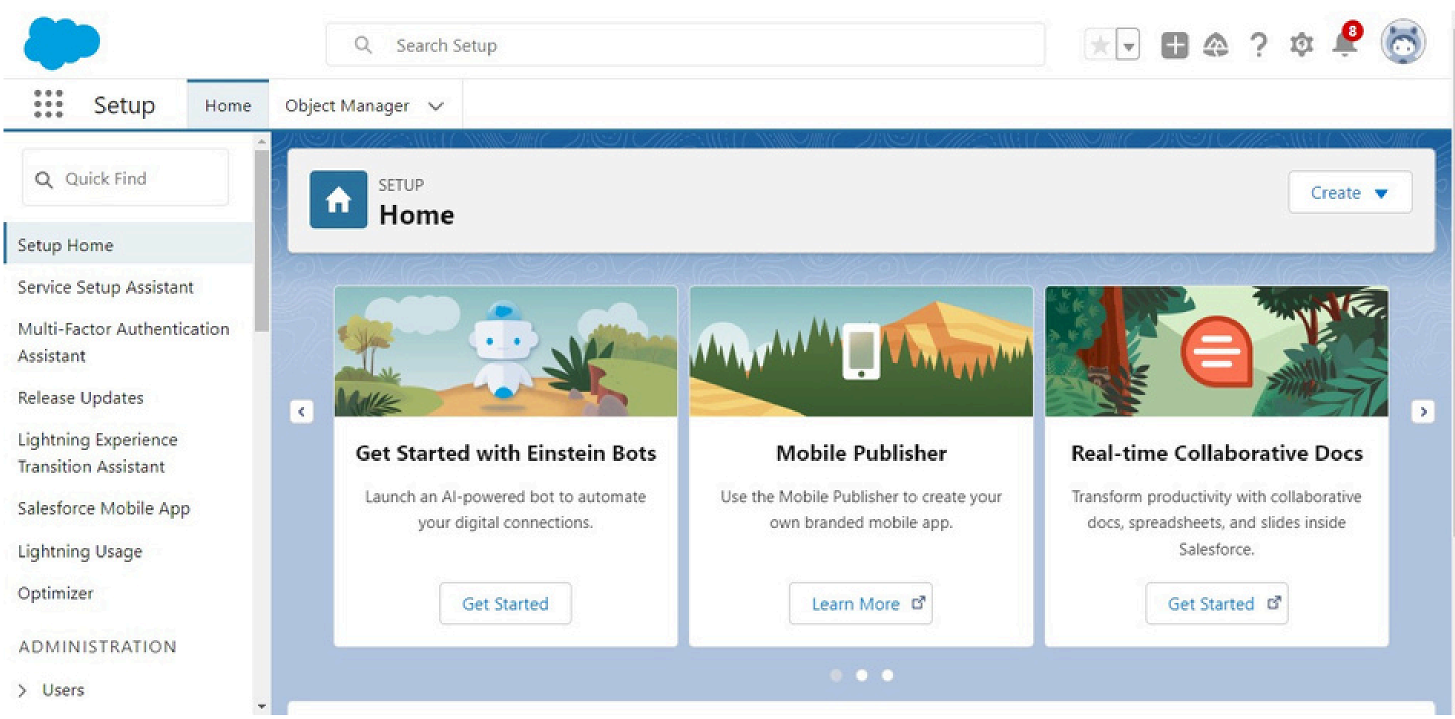
1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.



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:

Create Customer Details Object

To create an object:

Custom Object.

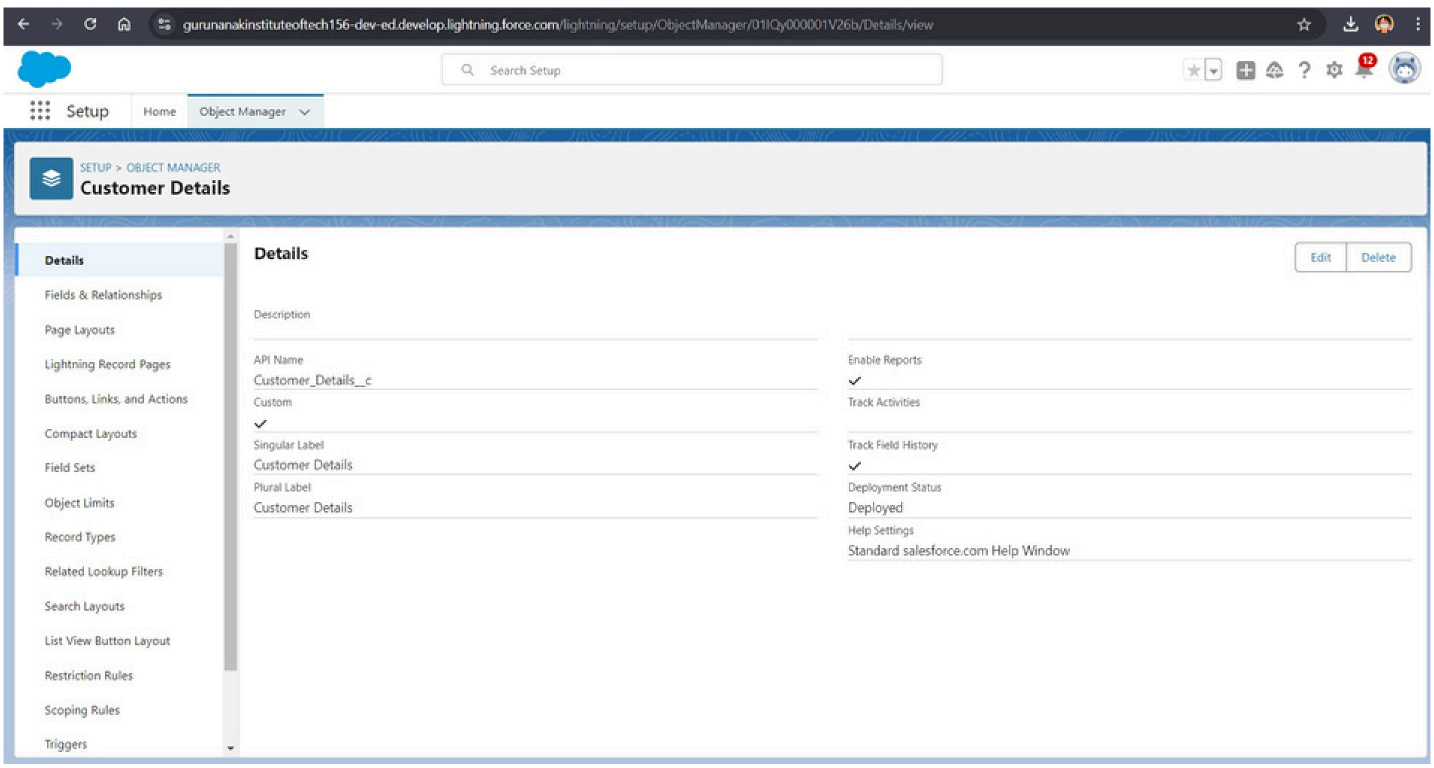
1. From the setup page >> Click on Object Manager >> Click on Create >> Click on

    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.



Create Appointment Object

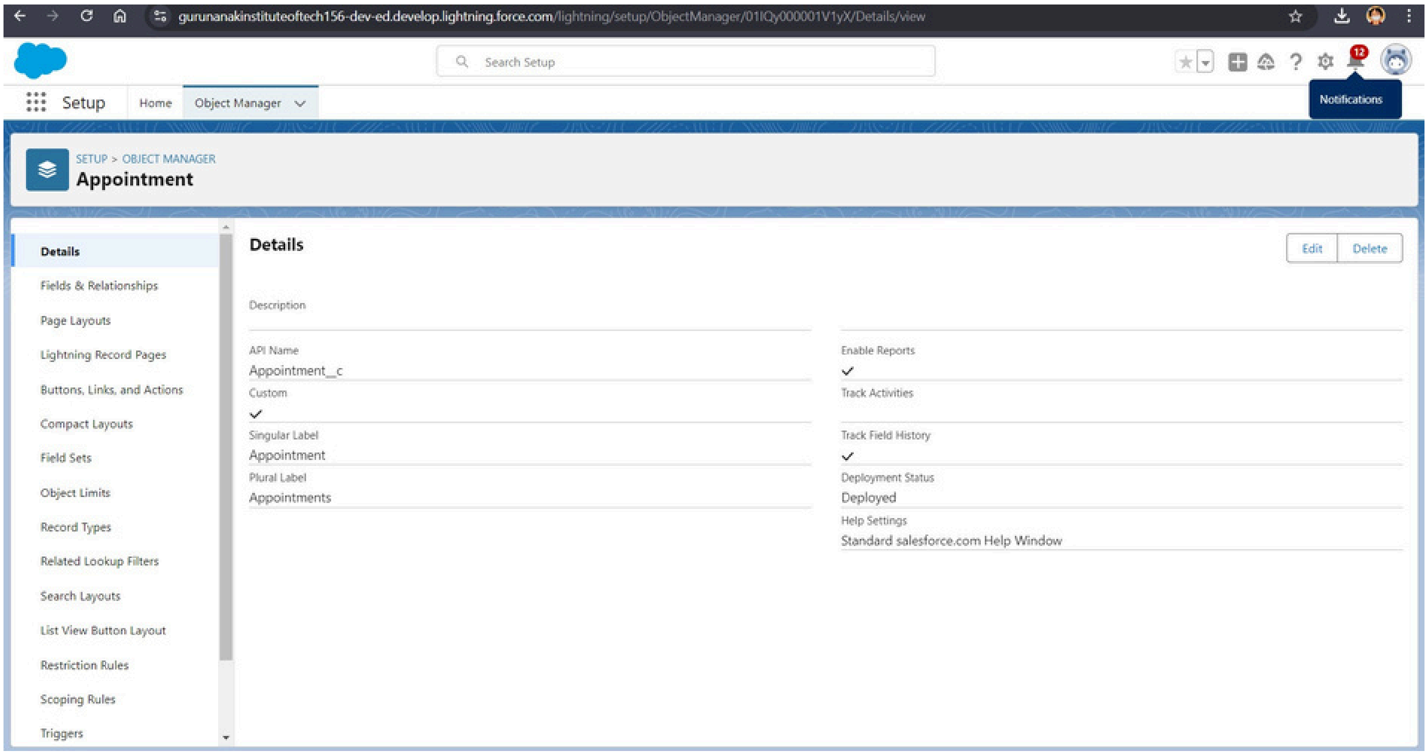
To create an object:

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

    1. Enter the label name >> Appointment
    2. Plural label name >> Appointments
    3. Enter Record Name Label and Format

- Record Name >> Appointment Name
- Data Type >> Auto Number
- Display Format >> app-{000}
- Starting number >> 1

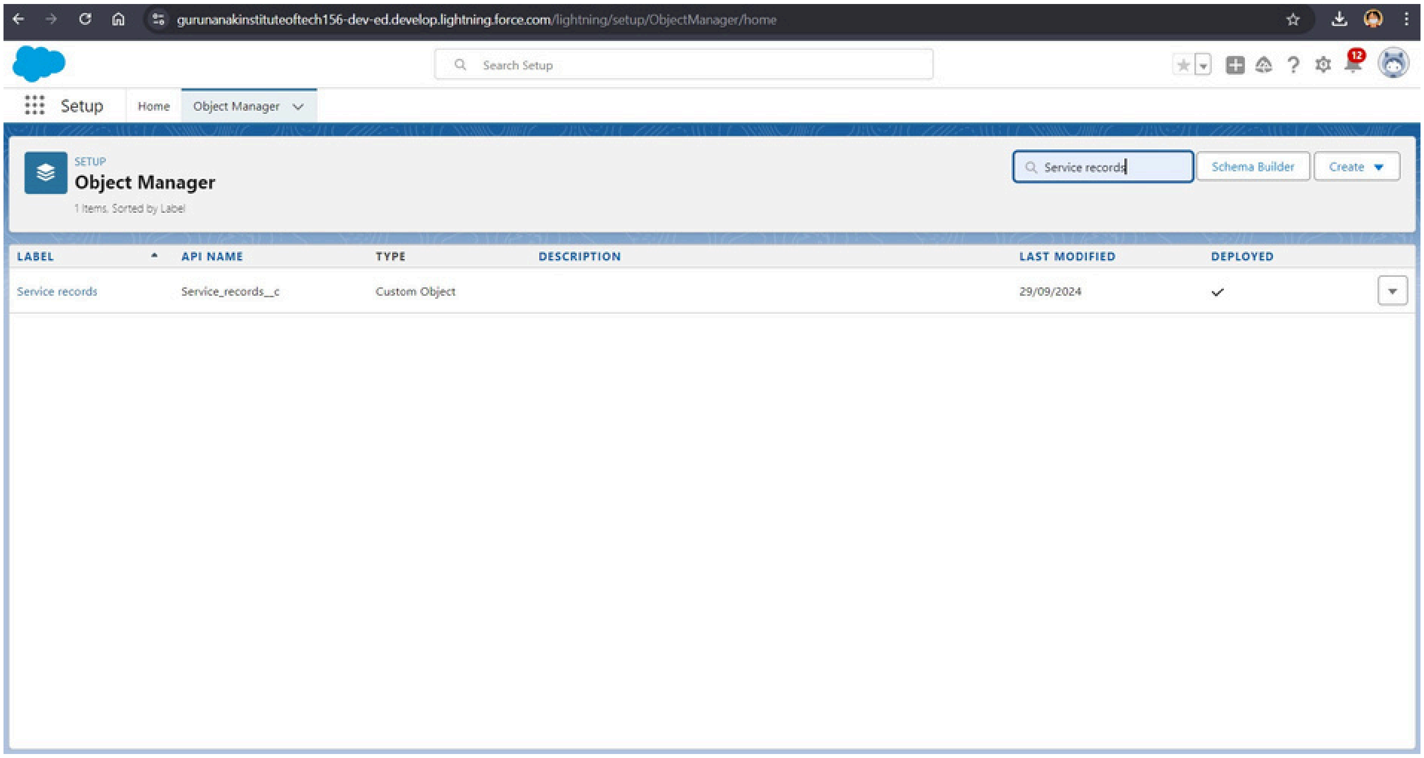
2. Click on Allow reports and Track Field History,
3. Allow search >> Save.



Create Service records Object

To create an object:

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



Create Billing details and feedback Object

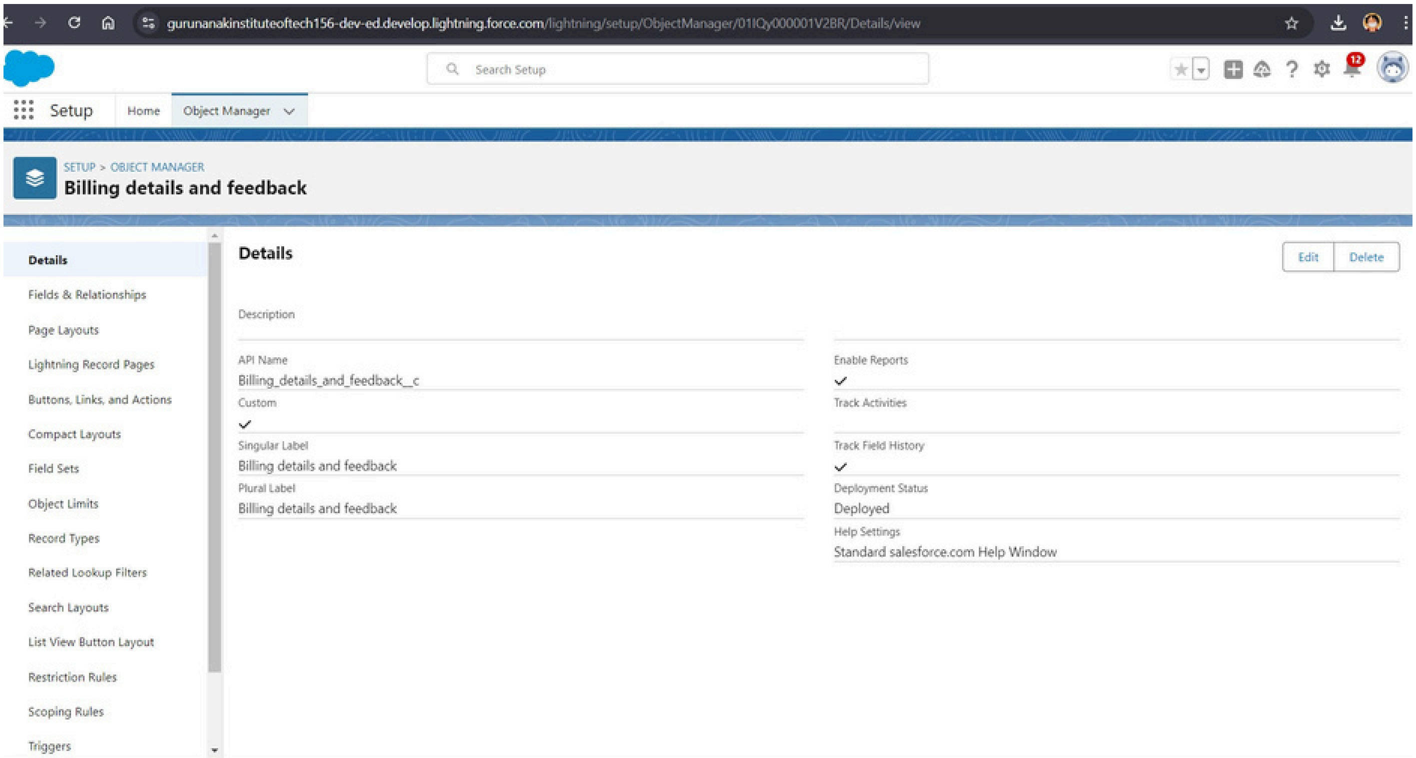
To create an object:

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

    1. Enter the label name >> Billing details and feedback
    2. Plural label name >> Billing details and feedback
    3. Enter Record Name Label and Format

        - Record Name >> Billing details and feedback Name
        - Data Type >> Auto Number
        - Display Format >> bill-{000}
        - Starting number >> 1

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

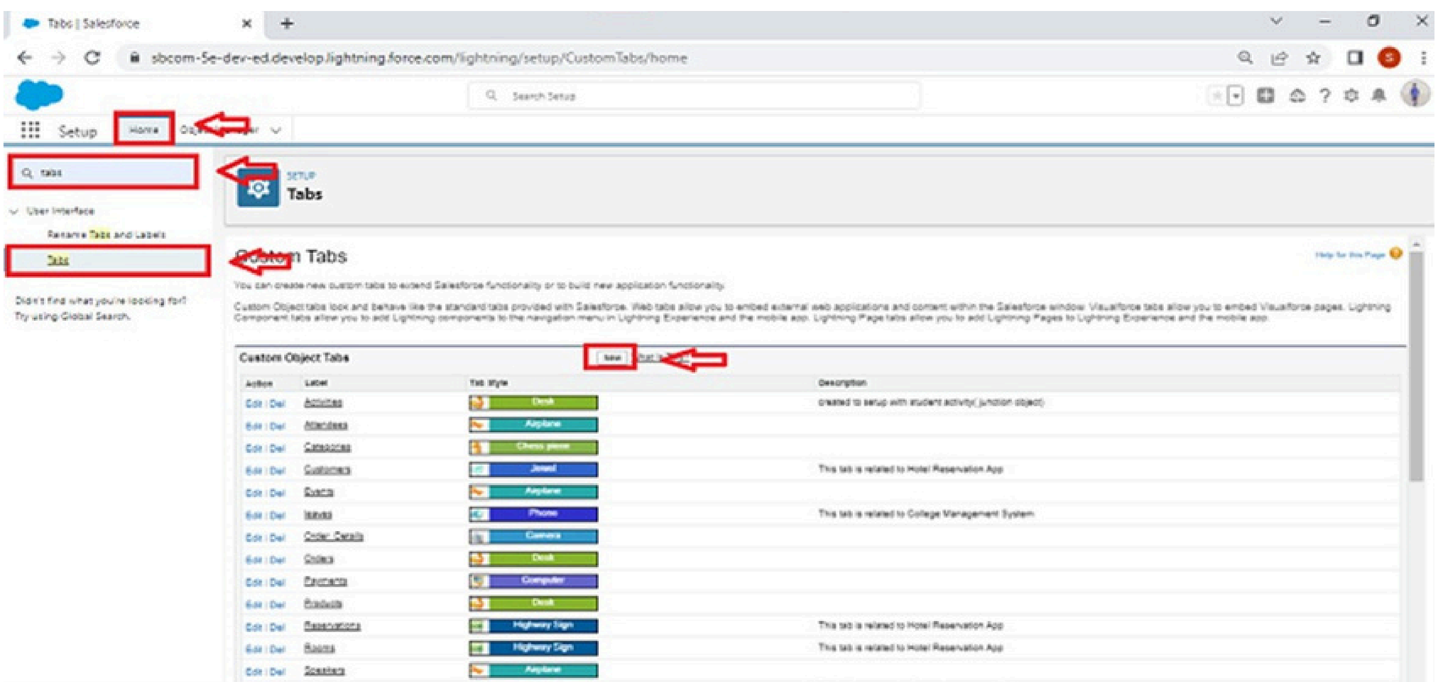


TASK 3:

Creating a Custom Tab

To create a Tab:(Customer Details)

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



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

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

4. Click save.

To create a Tab:(Appointment)

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

To create a Tab:(Service Records)

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

To create a Tab:(Billing details and feedback)

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

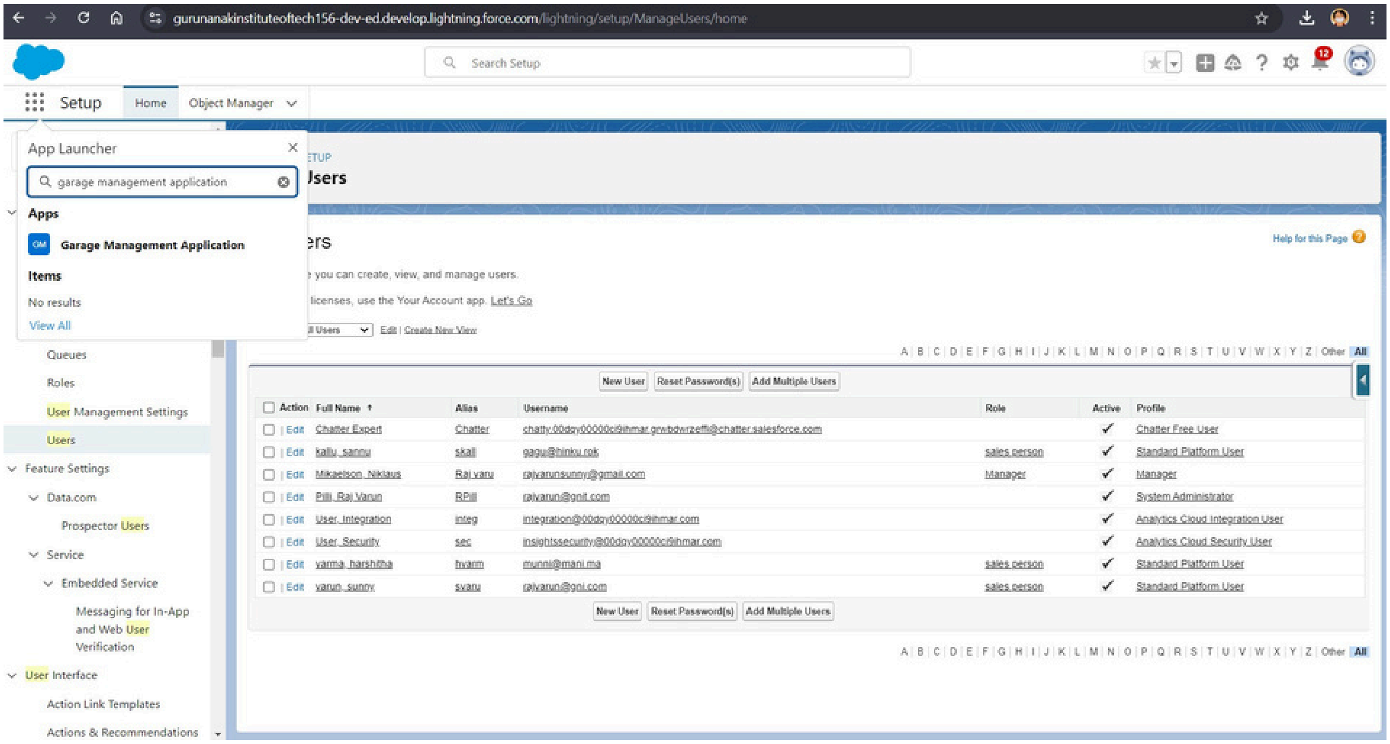
TASK 4:

Create 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.
2. Fill the app name in app details as Garage Management Application >> Next >> (App option page)
3. keep it as default >> Next >> (Utility Items) keep it as default >> Next.
4. 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 5:

Creation of fields for the Customer Details object

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

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

2. To create another fields in an object:

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

Creation of Lookup Fields

Creation of Lookup Field on Appointment Object :

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

Note: Make sure you complete Activity 4 Before continuing.

Creation of Lookup Field on Service records Object :

1. Go to setup >> click on Object Manager >> type object name(Service records) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New Select “Look-up relationship” as data type and click Next.
3. Select the related object “ Appointment ” and click next.
4. Make it a required field so click on Required.
5. Scroll down for Lookup Filter and click on Show filter settings.
6. Now add the filter criteria.
7. Field : Appointment: Appointment Date >> Operator : less than >> select field >> Appointment: Created Date Filter type should be Required.
8. Error Message : Value does not match the criteria. Enable the filter by click on Active.
9. Next >> Next >> Save.

Creation of Lookup Field on Billing details and feedback Object :

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

Creation of Checkbox Fields

Creation of Checkbox Field on Appointment Object :

1. Go to setup >> click on Object Manager >> type object name(Appointment) in search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select "Check box" as data type and click Next.
4. Give the Field Label : Maintenance service
5. Field Name : is auto populated
6. Default value : unchecked
7. Click on next >> next >> save.

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.

Creation of Checkbox Field on Service records Object :

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

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

   Select "Check box" as data type and click Next.

   Give the Field Label : Quality Check Status
2. Field Nme : is auto populated
3. Default value : unchecked
4. Click on next >> next >> save

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.

Creation of Currency Fields

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
6. Click on next
7. Give read only for all the profiles in field level security for profile.
8. Click on next > > save.

Creation of Currency Field on Billing details and feedback Object :

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

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. ow click on "Fields & Relationships" >> New.
3. Select " Text" as data type and click Next.
4. Give the Field Label : Vehicle number plate

5. Field Name : is auto populated
6. Length : 10
7. Make field as Required and Unique.
8. Click on next >> next >> save.

Creation of Text Fields in Billing details and feedback object :

1. Go to setup >> click on Object Manager >> type object name(Billing details and feedback) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select “text” as data type and click Next.
4. Give the Field Label : Rating for service
5. Field Name : is auto populated
6. Length : 1
7. Make field as Required and Unique.
8. Click on next >> next >> save

Creation of Picklist Fields

Creation of Picklist Fields in Service records object :

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

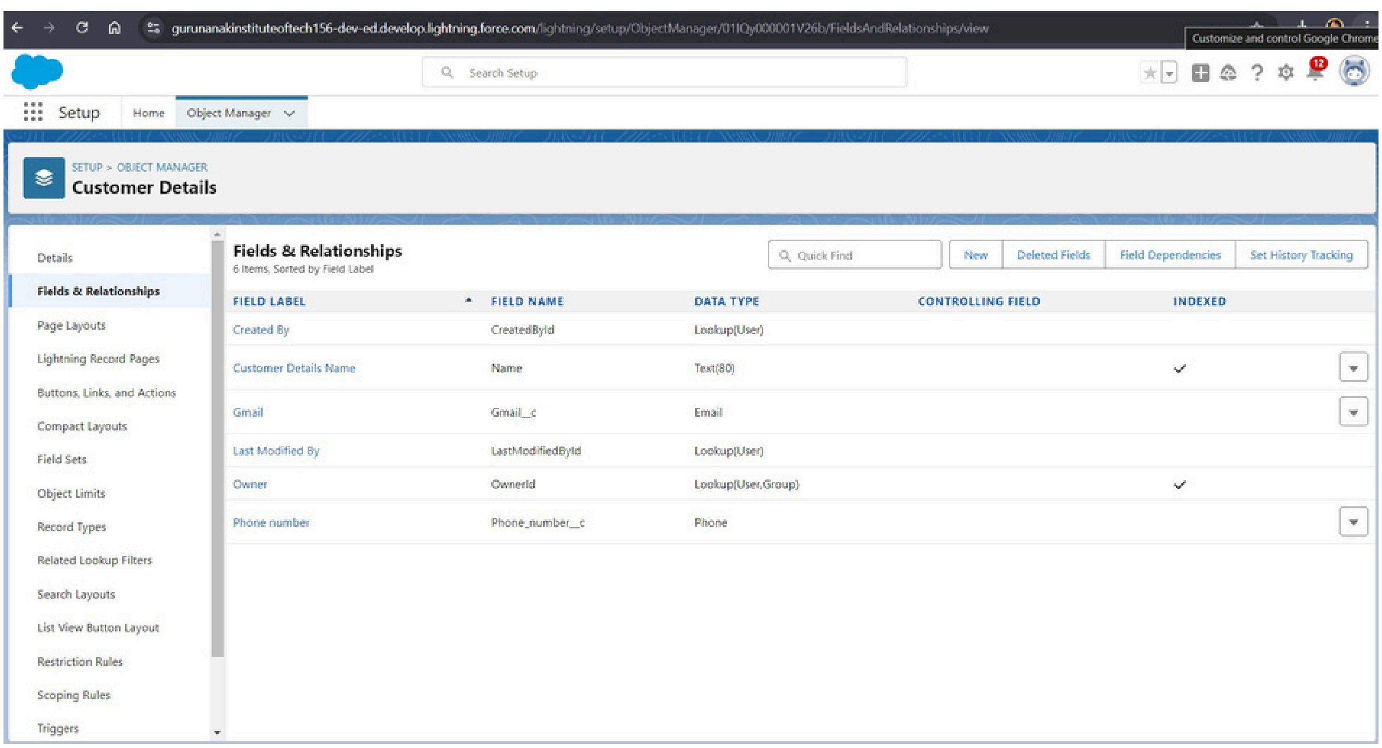
Creation of Picklist Fields in Billing details and feedback object :

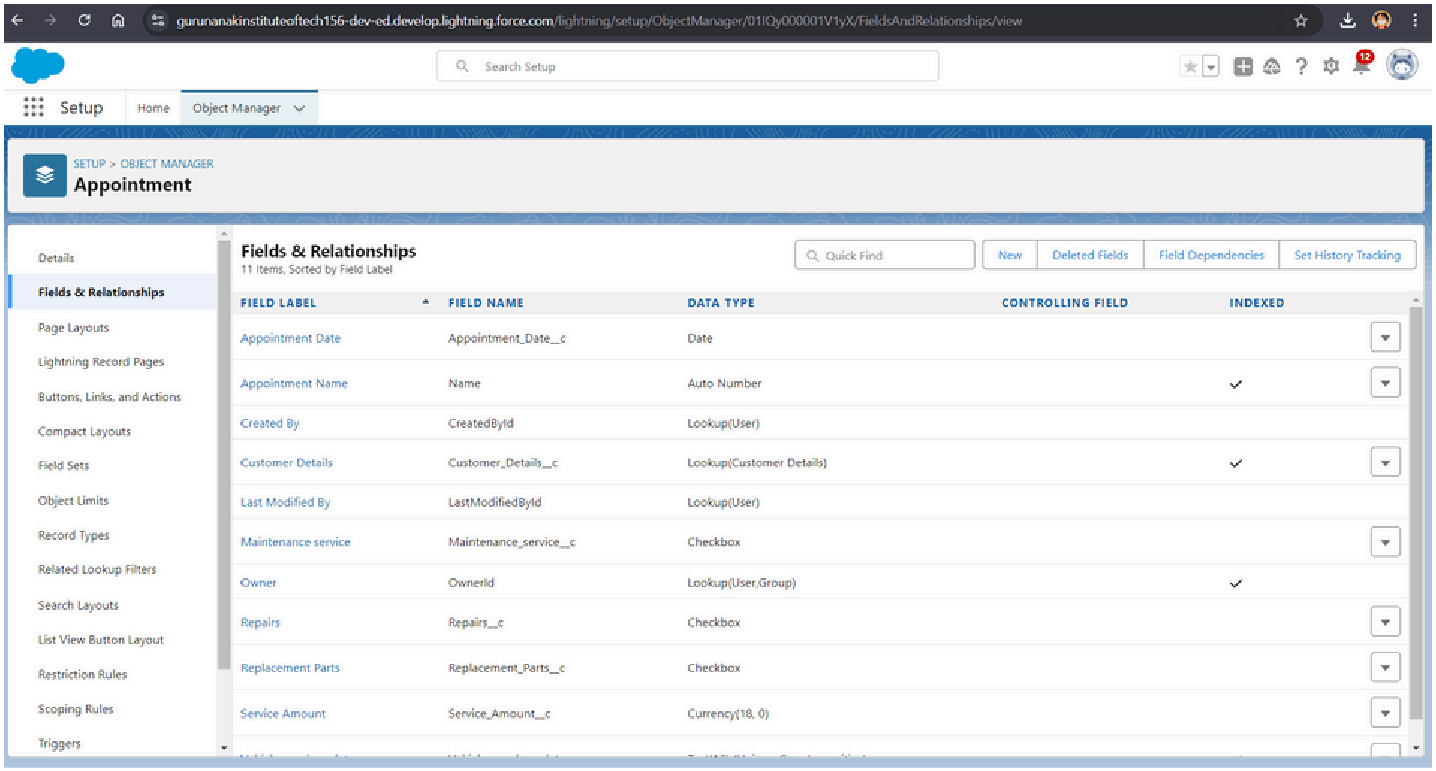
1. Go to setup >> click on Object Manager >> type object name(Billing details a nd feedback) in search bar >> click on the object.
2. Click on fields & relationship >> click on New.
3. Select Data type as “Picklist” and click Next.
4. Enter Field Label as “Payment Status”, under values select “Enter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

5. value separated by a new line" and enter values as shown below.
6. The values are: Pending, Completed. Click Next.
7. Next >> Next >> Save.

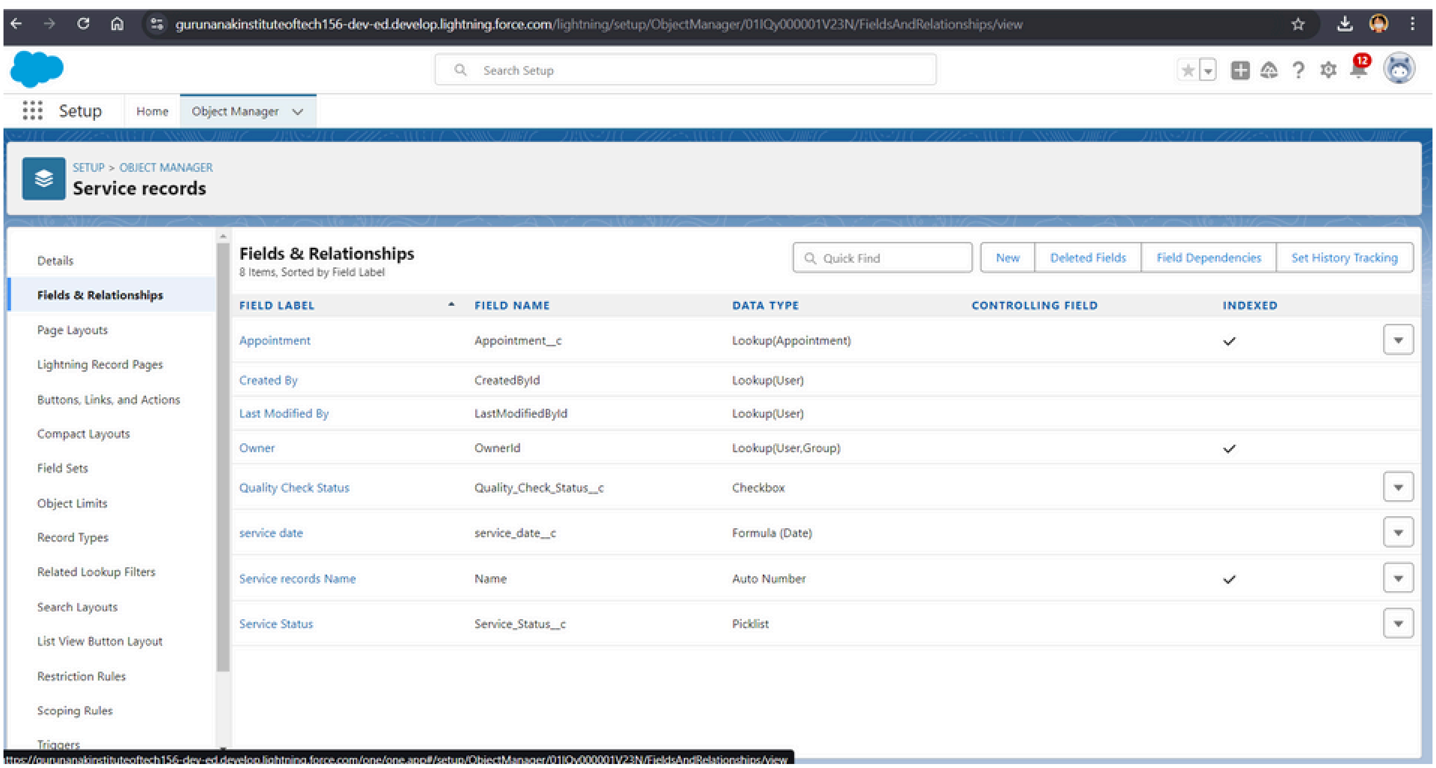
Creating Formula Field in Service records Object

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

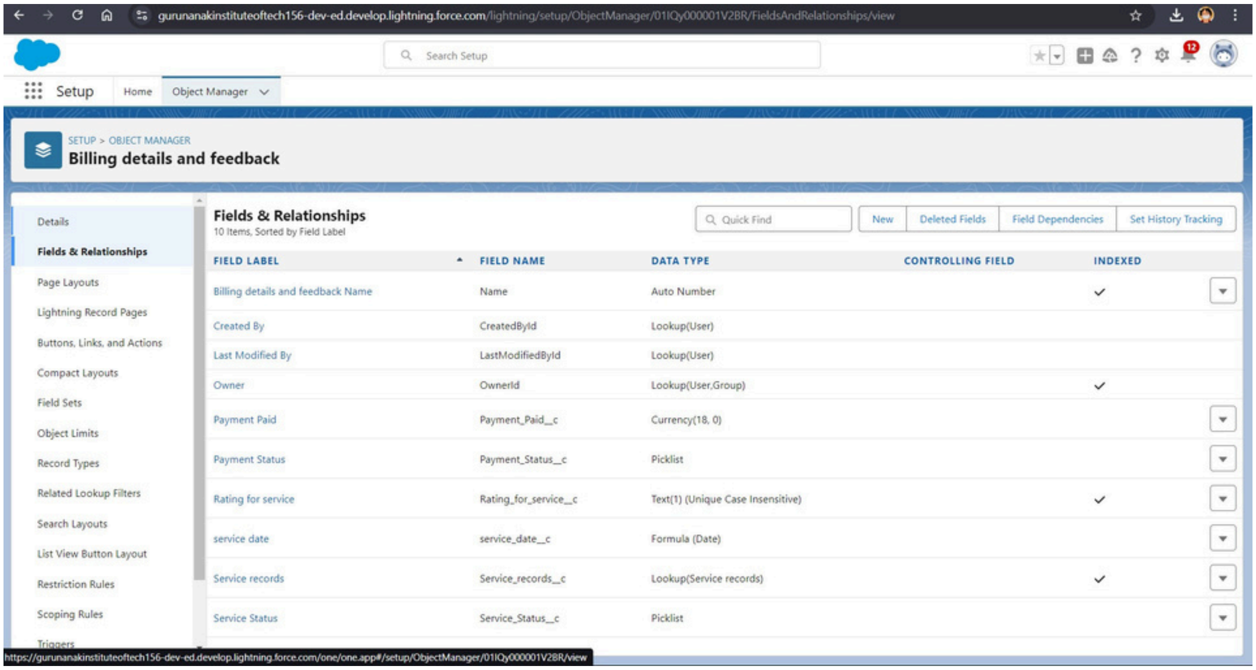




FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment Date	Appointment_Date__c	Date		
Appointment Name	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Customer Details	Customer_Details__c	Lookup(Customer Details)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Maintenance service	Maintenance_service__c	Checkbox		
Owner	OwnerId	Lookup(User,Group)		✓
Repairs	Repairs__c	Checkbox		
Replacement Parts	Replacement_Parts__c	Checkbox		
Service Amount	Service_Amount__c	Currency(18, 0)		



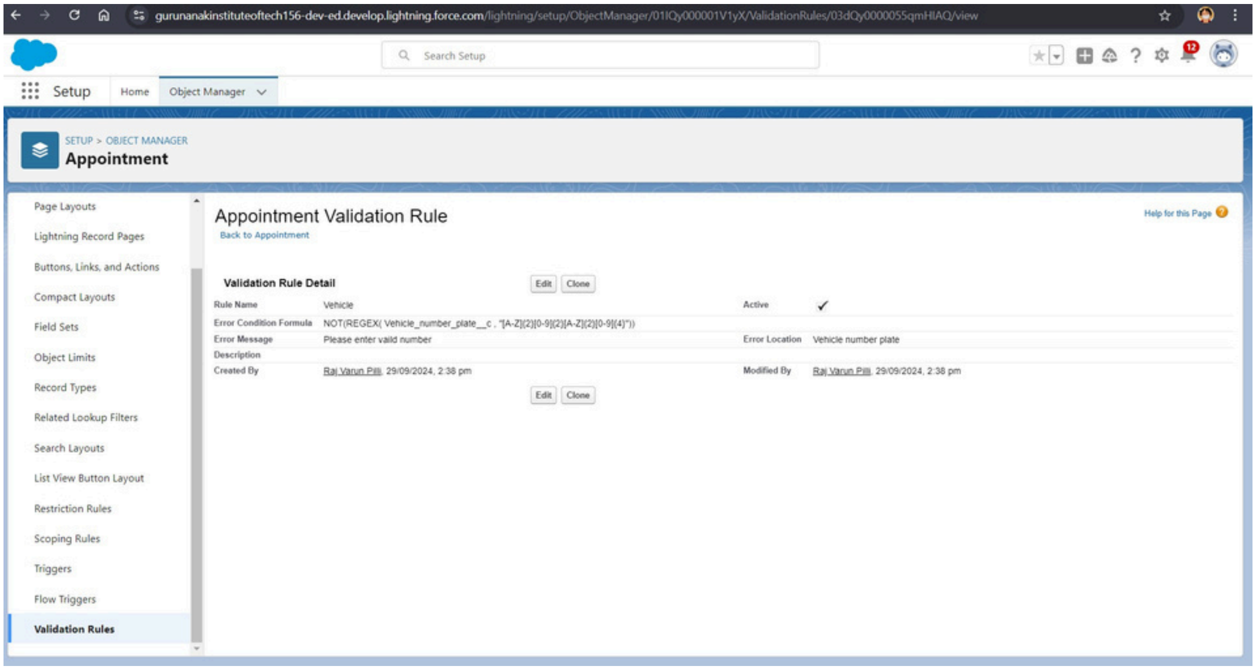
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment	Appointment__c	Lookup(Appointment)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Quality Check Status	Quality_Check_Status__c	Checkbox		
service date	service_date__c	Formula (Date)		
Service records Name	Name	Auto Number		✓
Service Status	Service_Status__c	Picklist		



TASK 6:

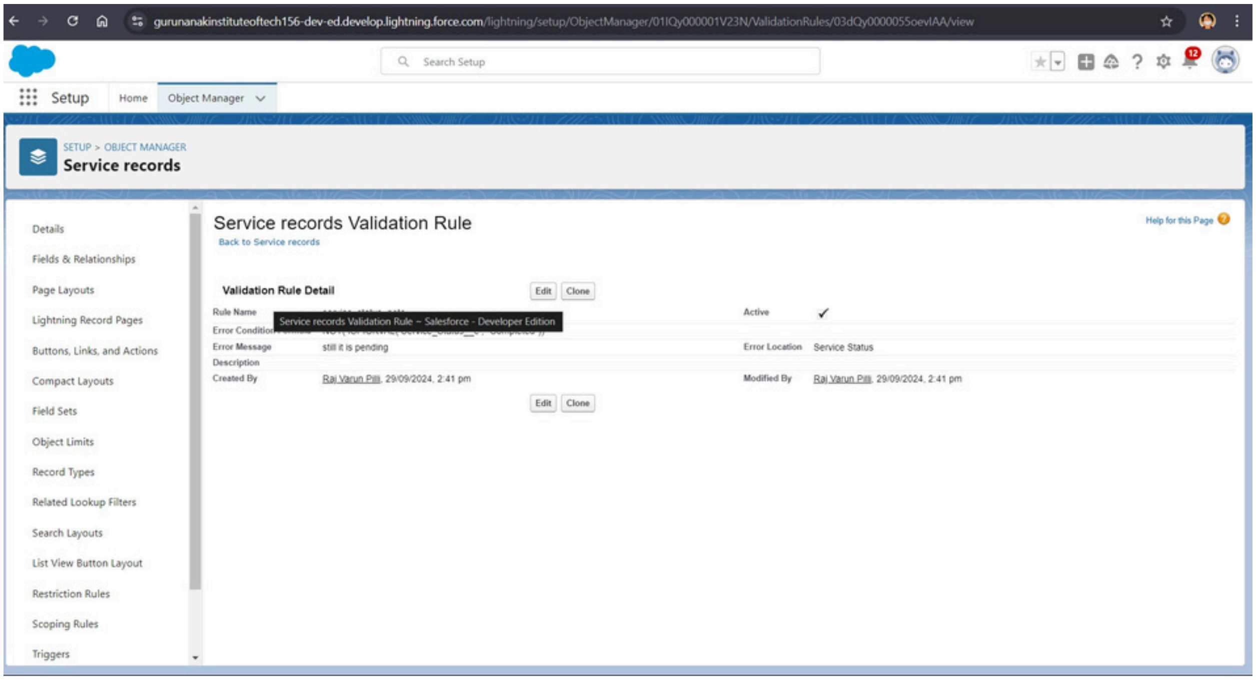
To create a validation rule to an Appointment Object

1. Go to the setup page >> click on object manager >> From drop down click edit for Appointment object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as “ Vehicle ”.
4. Inser t the Error Condition Formula as : - NOT(REGEX(Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))
   Enter the Error Message as “Please enter vaild number ”, select the Error location as Field and select the field as “Vehicle number plate”, and click Save.



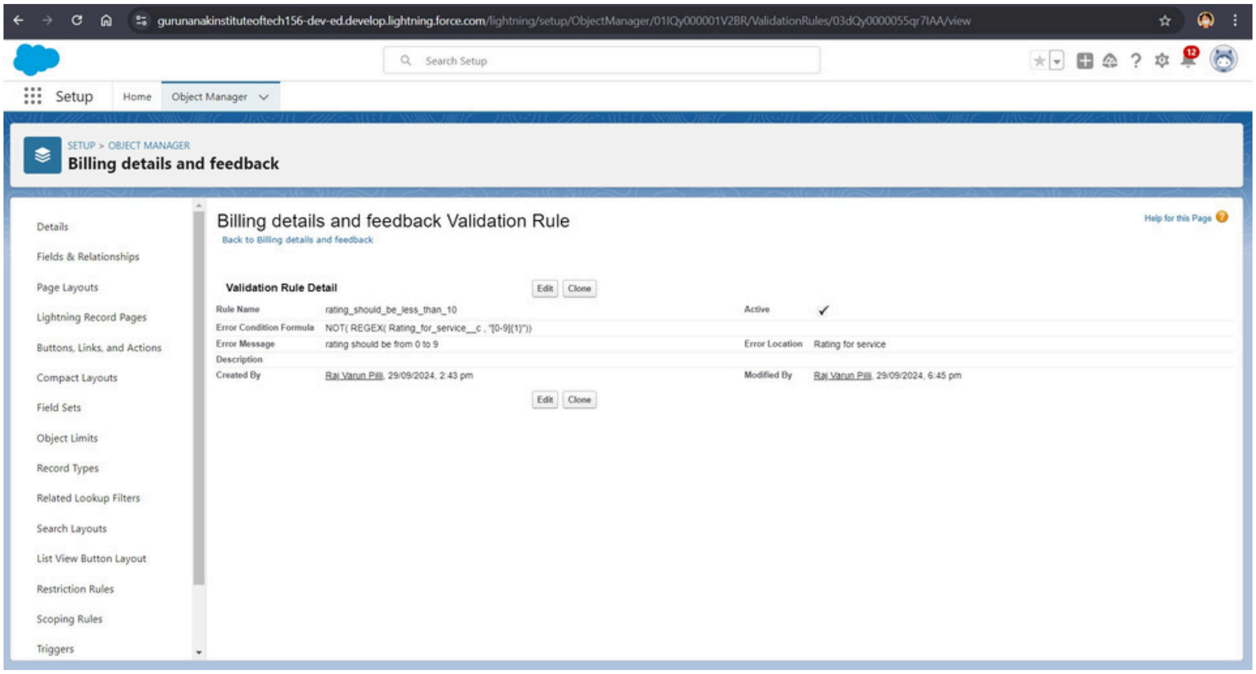
To create a validation rule to an Service records Object

1. Go to the setup page >> click on object manager >> From drop down click edit for Ser vice records object .
2. Click on the validation rule >> click New.
3. Enter the Rule name as “ service_status_note ”.
4. Inser t the Error Condition Formula as : -
   NOT(ISPICKVAL(Service_Status__c , "Completed"))
   Enter the Error Message as “still it is pending”, select the Error location as Field and selec t the field as “ Ser vice status”, and click Save.



To create a validation rule to an Billing details and feedback Object

1. Go to the setup page >> click on object manager >> From drop down click edit for Billing details and feedback object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as “ rating_should_be_less_than_5”.
4. Inser t the Error Condition Formula as : - NOT(REGEX(Rating_for_service__c , "[1-5]{1}")) Enter the Error Message as “ rating should be f
   rom 1 to 5”, select the Error location
   as Field and select the field as “Rating for Service”, and click Save.

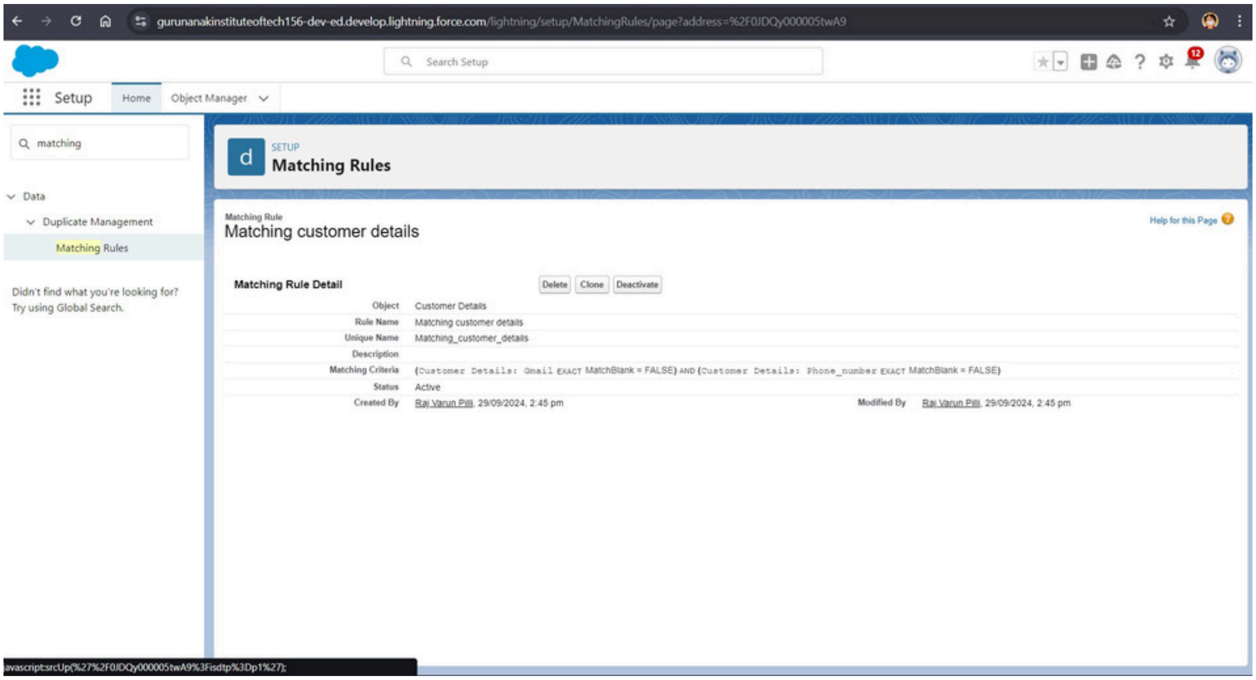


TASK 7:

To create a matching rule to an Customer details Object

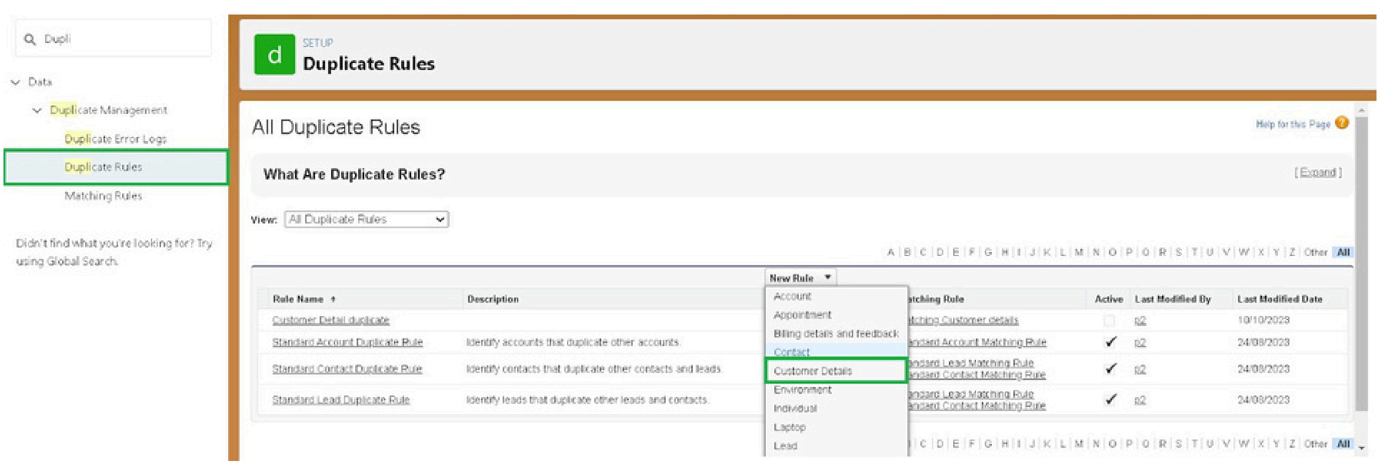
1. Go to quick find box in setup and search for matching Rule.
2. Click on matching rule >> click on New Rule.
3. Select the object as Customer details and click Next.
4. Give the Rule name : Matching customer details
5. Unique name : is auto populated
6. Define the matching criteria as
7. Field Matching Method
8. 1. Gmail Exact

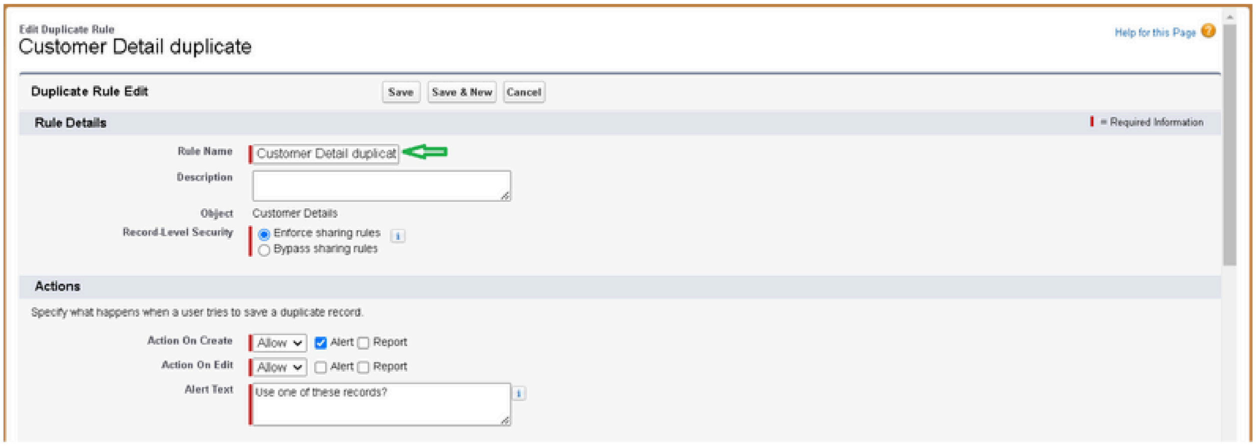
   2. Phone Number Exact Click save.
9. After Saving Click on Activate.

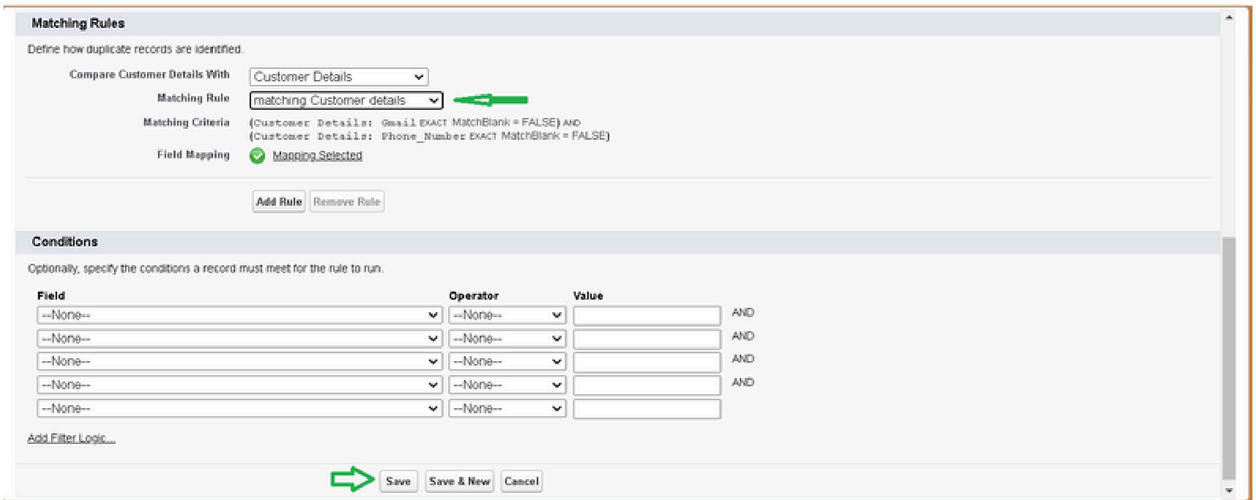


To create a Duplicate rule to an Customer details Object

1. Go to quick find box in setup and search for Duplicate rules.
2. Click on Duplicate rule >> click on New Rule >> select customer details object.
3. Give the Rule name as : Customer Detail duplicate
4. Scroll a little in Matching rule section
5. Select the matching rule : Matching customer details
6. And Click on save.
7. After saving the Duplicate Rule, Click on Activate.







TASK 8:

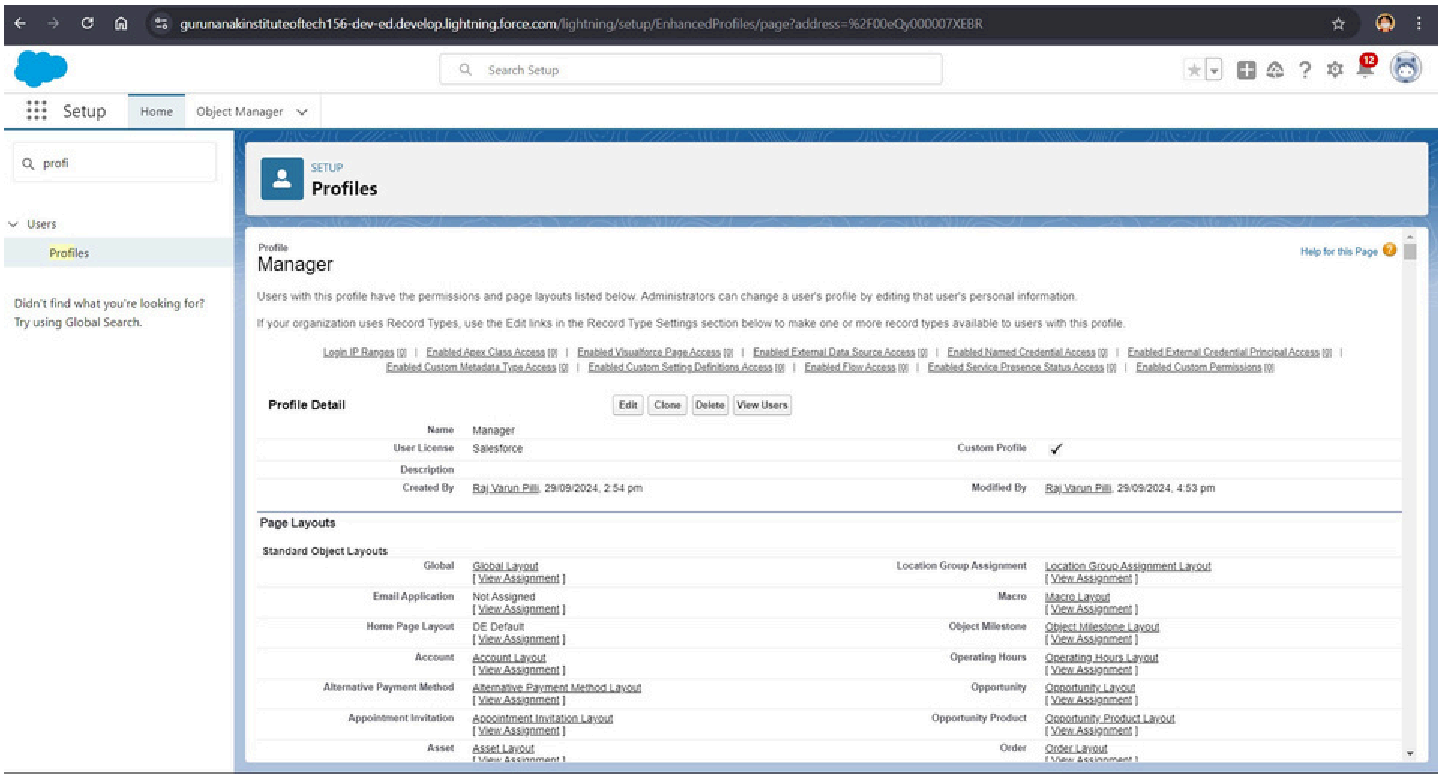
Manager Profile

To create a new profile:

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (Manager) >> Save.
2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the Garage management.
4. Scroll down to Custom Object Permissions and Give access permissions for

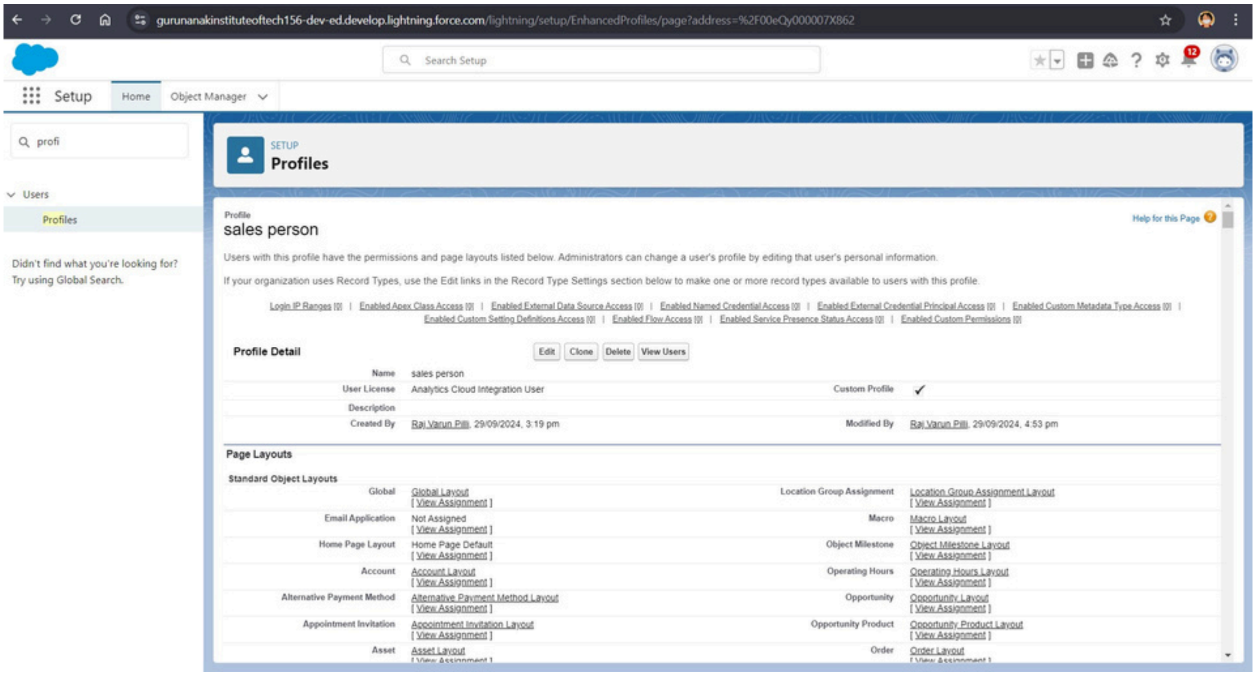
Appointments,Billing details and feedback , service records and customer details objects as mentioned in the below diagram.

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



sales person Profile

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Salesforce Platform User) >> enter profile name (sales person) >> Save.
2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the GArage management.
4. Scroll down to Custom Object Permissions and Give access permissions for Appointments,Billing details and feedback , service records and customer details objects as mentioned in the below diagram.
5. And click save.



TASK 9:

Creating Manager Role

Creating Manager Role:

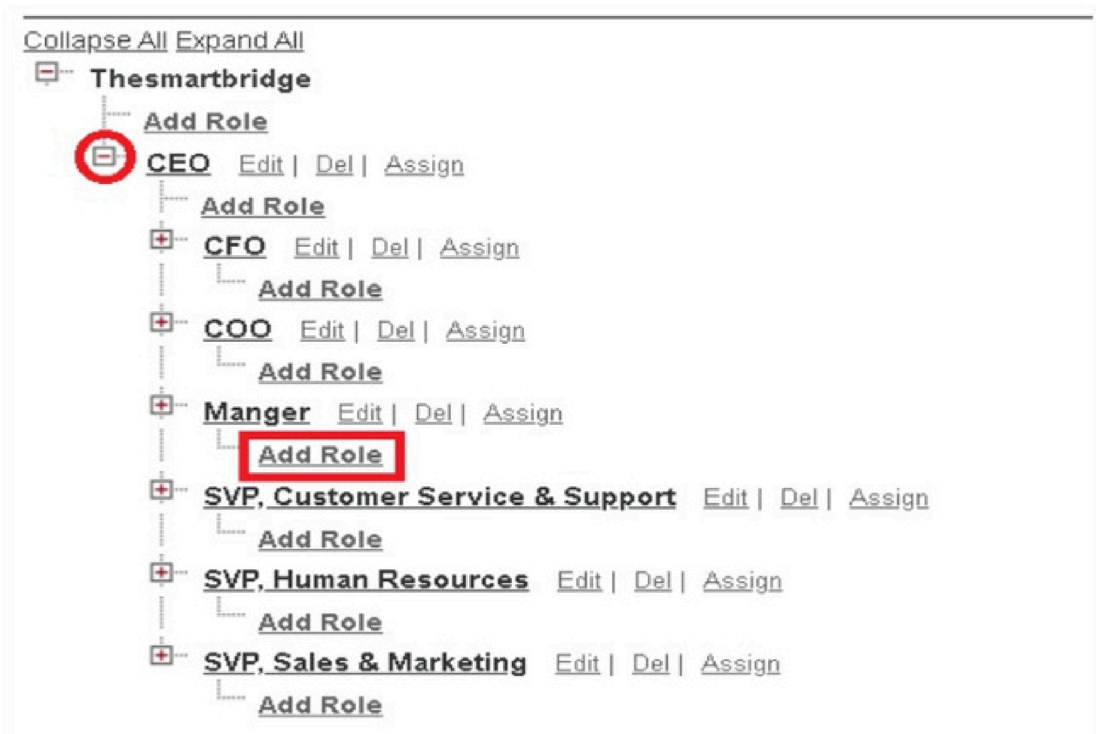
1. Go to quick find >> Search for Roles >> click on set up roles.
2. Click on Expand All and click on add role under whom this role works
   Give Label as "Manager " and Role name gets auto populated.
3. Then click on Save.

Creating another roles

Creating another two roles under manager

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

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

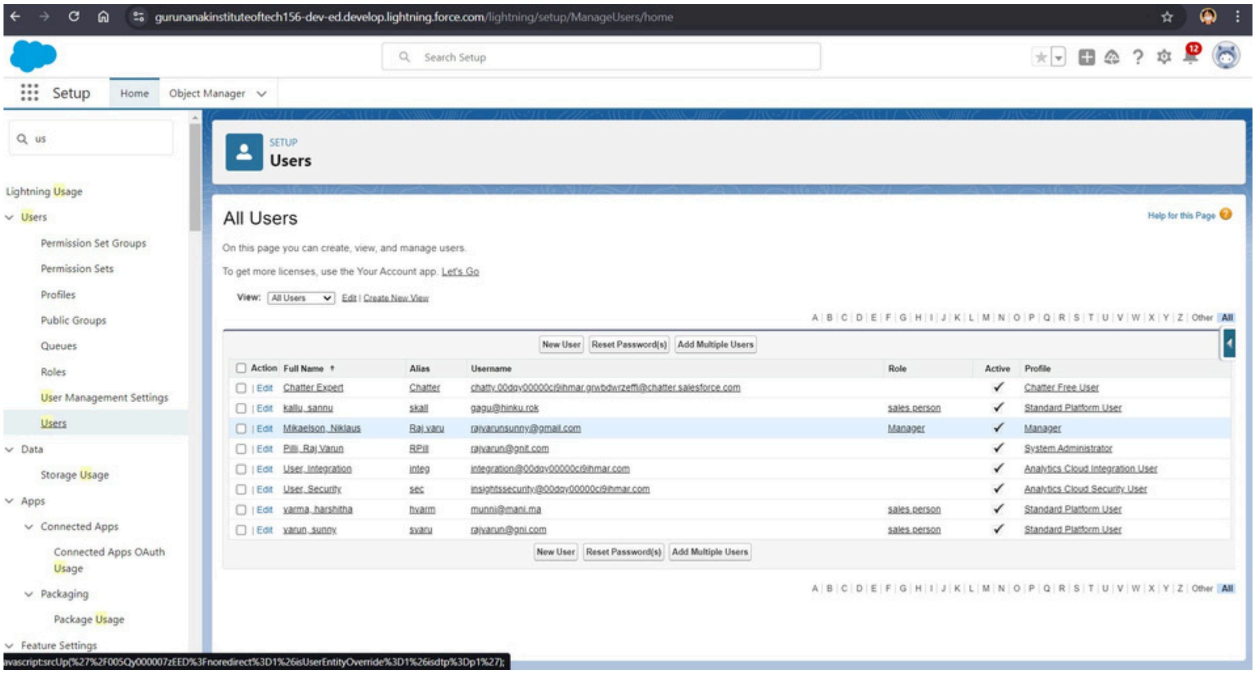


TASK 10:

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

3. Save.



creating another users

1. Repeat the steps and create another user using

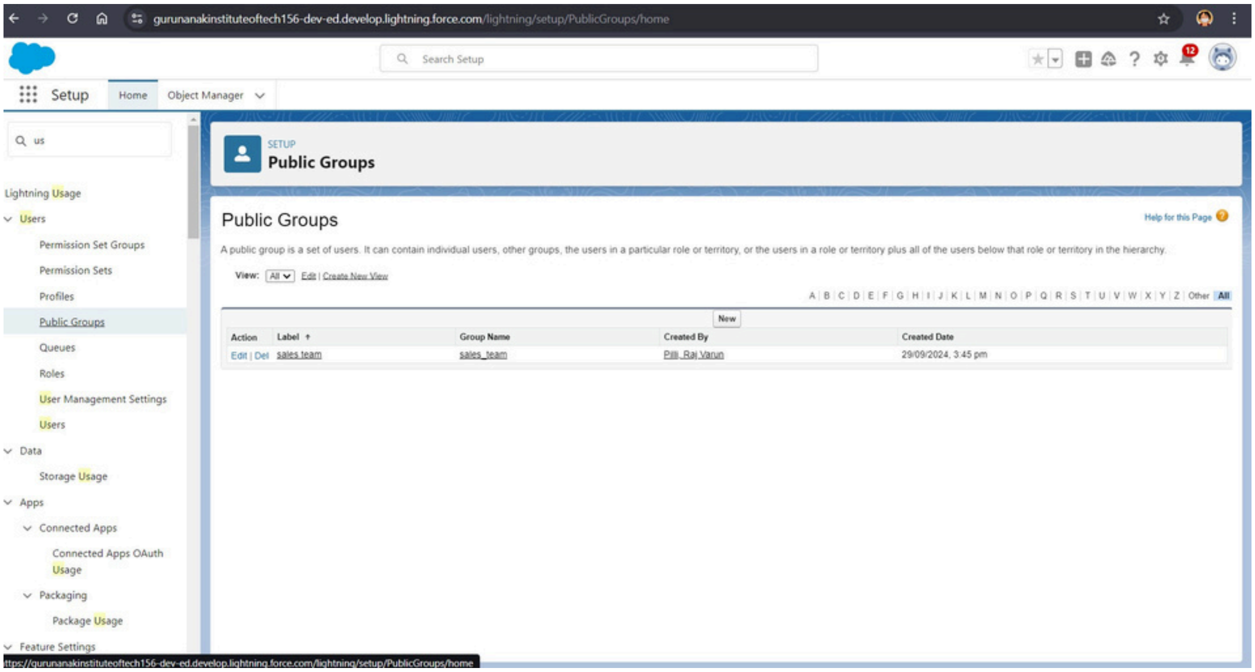
    1. Role : sales person
    2. User licence : Salesforce Platform
    3. Profile : sales person

Note : create atleast 3 users with these permissions.

TASK 11:

Creating New Public Group

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

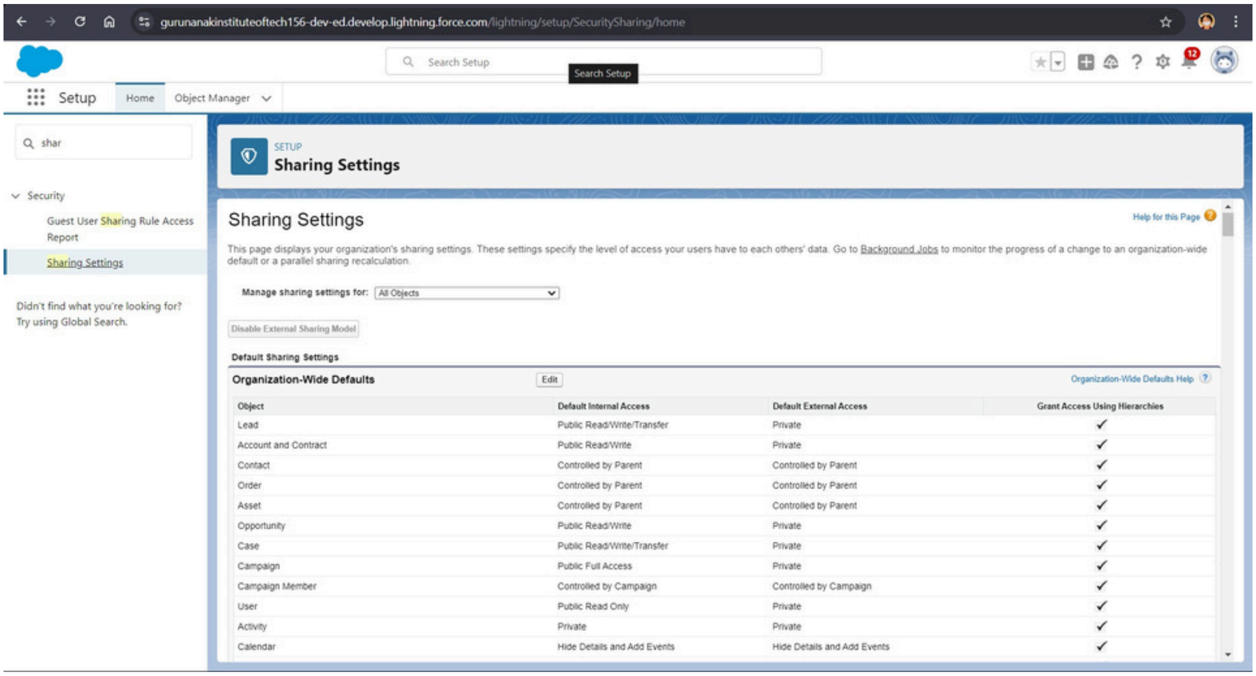


TASK 12:

Creating Sharing settings

1. Go to setup >> type users in quick find box >> select Sharing Settings >> click Edit.
2. Change the OWD setting of the Service records Object to private as shown in fig.
3. Click on save and refresh.
4. Scroll down a bit, Click new on Service records sharing Rules.

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



TASK 13:

Create a Flow

1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select th e New Flow.
2. Select the Record-triggered flow and Click on Create.
3. Select the Object as “Billing details and feedback”in the Drop down list.
4. Select the Trigger Flow when: “A record is Created or Updated”.
5. Select the Optimize the flow for: “Actions and Related Records” and Click on Done.
6. Under the Record-triggered Flow Click on “+” Symbol and In the Drop down List select the “Update records Element”.
7. Give the Label Name : Amount Update
8. Api name : is auto populated
9. Set a filter condition : All Conditions are met(AND)
10. Field : Payment_Status__c
11. Operator : Equals
12. Value : Completed
13. And Set Field Values for the Billing details and feedback Record
14. Field : Payment_Paid__c

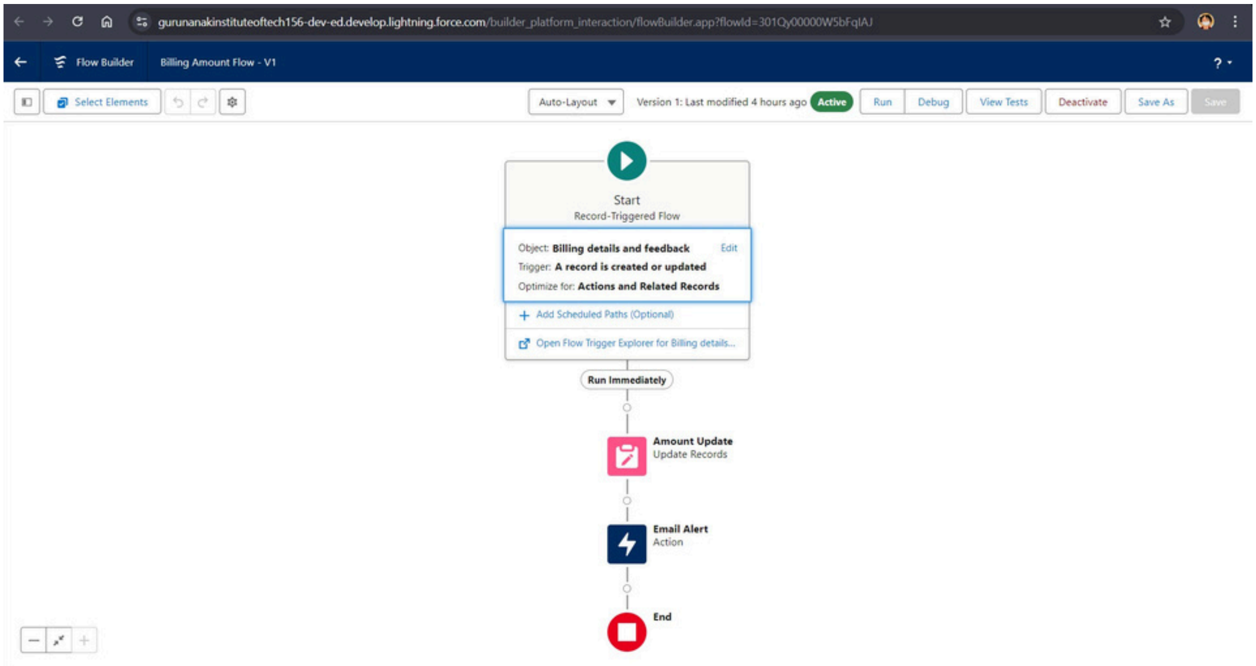
15. Value : {!$Record.Service_records__r.Appointment__r.Service_Amount__c}
16. Click On Done.
17. Before creating another Element. Create a New Resource form Toolbox form top left.
18. Click on the New Resource, And select Variable.
19. Select the resource type as text template.
20. Enter the API name as “ alert”.
21. Change the view as Rich Text ? View to Plain Text.
22. In body field 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 ser vices to you and all our valued customers.

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

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



TASK 14:

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 ”.

```
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;
```

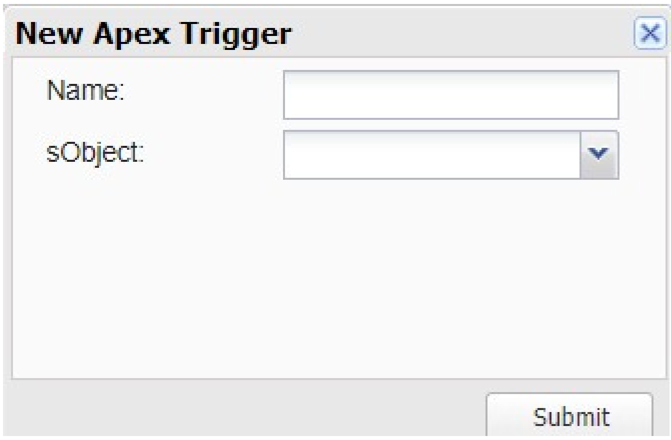
```
            }
            else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
                app.Service_Amount__c = 8000;
            }
            else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
                app.Service_Amount__c = 7000;
            }
            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 :

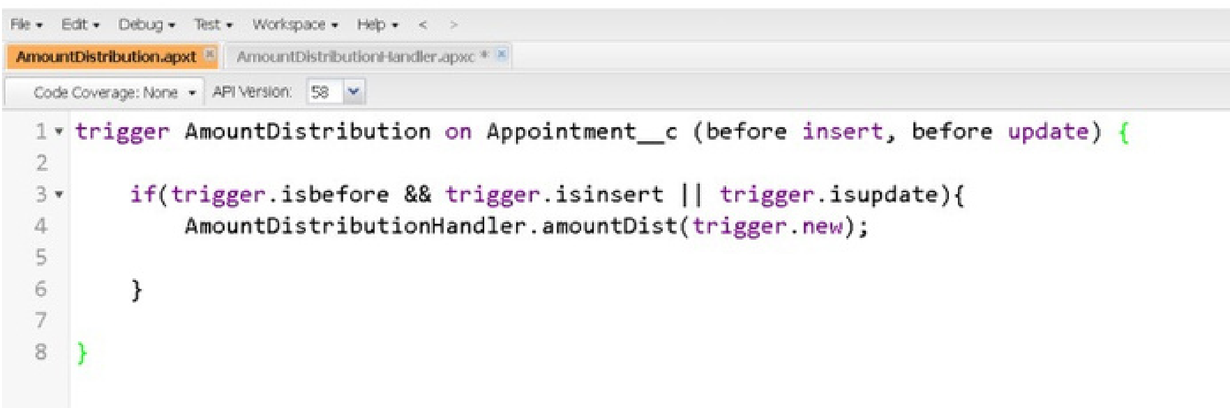
How to create a new trigger :

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



In this projec t , trigger is called whenever the par ticular 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



TASK 15:

create a report folder

1. Click on the app launcher and search for reports.
   Click on the report tab, click on new folder.
2. Give the Folder label as “Garage Management Folder”, Folder unique name will be auto populated.
3. Click save.

Sharing a report folder

1. Go to the app >> click on the reports tab.
2. Click on the All folder , click on the Drop down arrow for 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.

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.
3. Select the Primary object as " Customer details" .
4. Give the Report type Label as " Service information "
   Report type Name is autopopulated.
5. Keep the Description as same. Select Store in Category as " other Reports "
6. Select the deployment status as " Depolyed ", click on Next.
   now , Click on Related object box.
7. Click on Select Object, choose Appointment Object as shown in fig.
8. Again Click to relate another object.
9. And select the related object as " service records".
10. Repeat the process and select the related object as " Billing details and feedback".
11. And click on save.

Create Report

Note : Before creating report, create latest "10" records in every object.
Tr y to fill ever y field in each record for better experience.

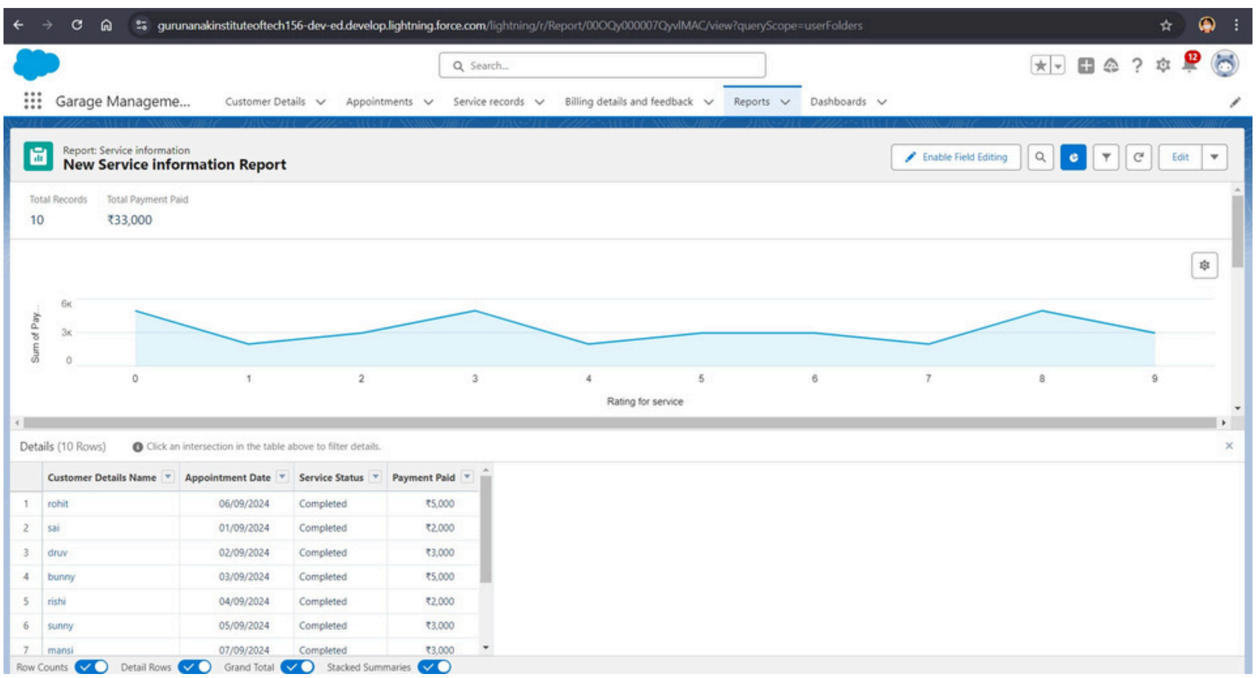
1. Go to the app >> click on the reports tab Click New Repor t .
2. Select the Category as other reports, search for Service Information, select

   that
3. report, click on it. And click on start report.

4. Their outline pane is opened alredy, select the fields that mentioned below in column section.

   1. Customer name
   2. Appointment Date
   3. Service Status
   4. Payment paid

5. Remove the unnecessary fields.
6. Select the fields that mentioned below in GROUP ROWS section.
   1. Rating for Service
7. Select the fields that mentioned below in GROUP ROWS section.
   1. Payment Status
8. Click on Add Chart , Select the Line Chart.
9. Click on save, Give the report Name : New Service information Report
10. Repor t unique Name is auto populated.
11. Select the folder the created and Click on save.



TASK 16:

Create Dashboard Folder

1. Click on the app launcher and search for dashboard.
2. Click on dashboard tab.
3. Click new folder, give the folder label as “ Service Rating dashboard”.
4. Folder unique name will be auto populated.
5. Click save.
6. Follow the same steps, form milestone 15, and activity 2, and provide the sharing
7. settings for the folder that just created.

Create Dashboard

1. Go to the app >> click on the Dashboards tabs.
2. Give a Name and select the folder that created, and click on cre ate.
3. Select add component.
4. Select a Report and click on select.
5. Selec t the Line Char t . Change the theme.
6. Click Add then click on Save and then click on Done.
7. Preview is shown below.
8. After that Click on Subcribe on top right.
9. Set the Frequency as “ weekly ”.
10. Set a day as monday.
11. And Click on save.