Garage Management system (CRM)

College Name: PPG College Of Arts And Science

College Code: bruap

TEAM ID: NM2025TMID25922

TEAM MEMBERS: 4

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Team Member: ARUMUGAM.M

Email: 2326j0194.cas@ppg.edu.in

Team Member: BHARATH.R

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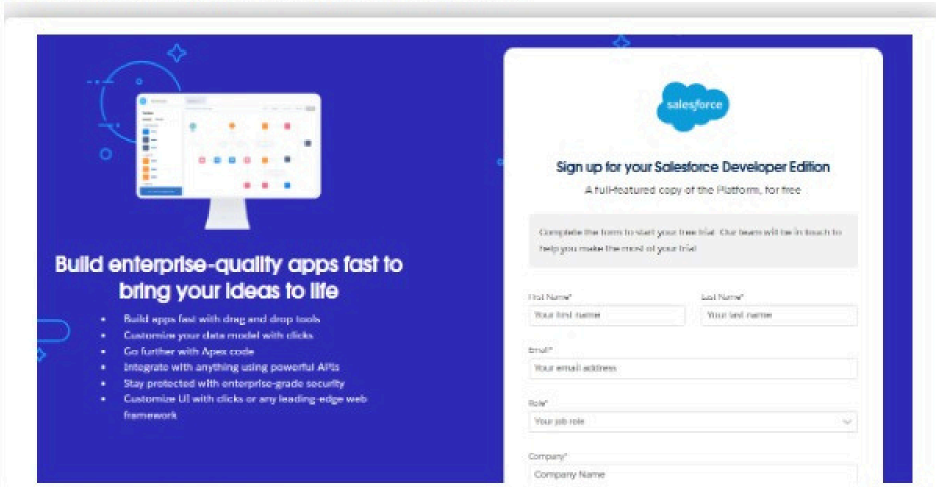
TeamMember :DIVYABHARATHY. T

Email: 2326j0197.cas@ppg.edu.in

Creating Developer Account:

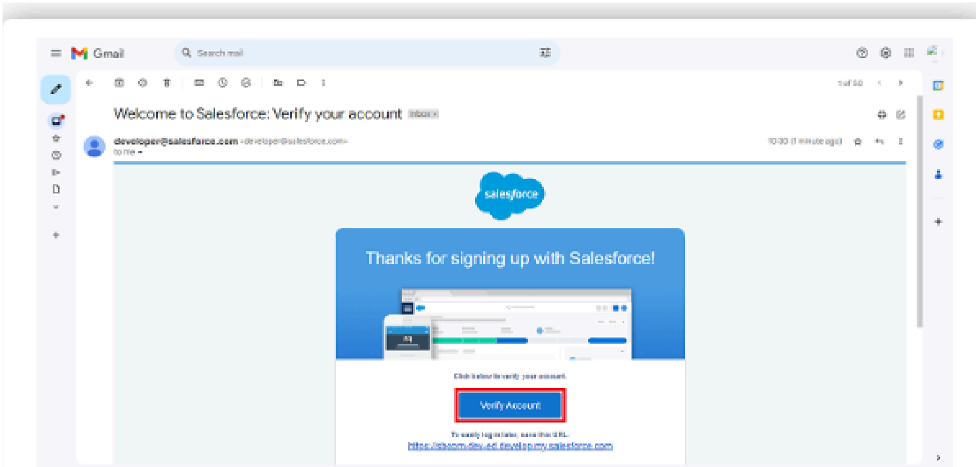
Creating a developer org in salesforce.

1. Go to https://developer.salesforce.com/signup
2. On the sign up form, enter the following details :



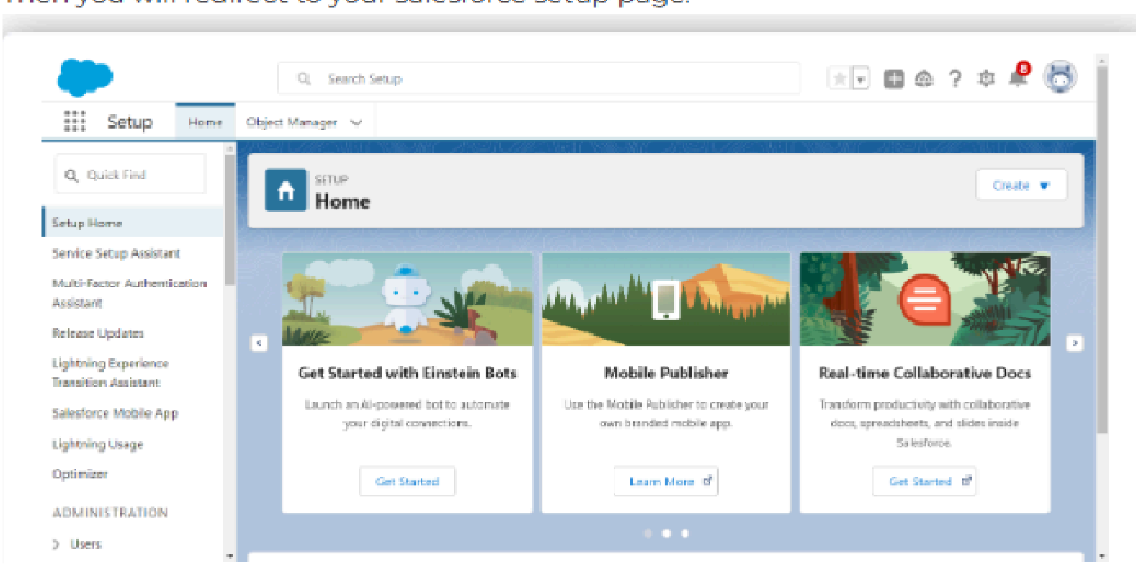
1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name

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



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

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



Create Customer DetailsObject

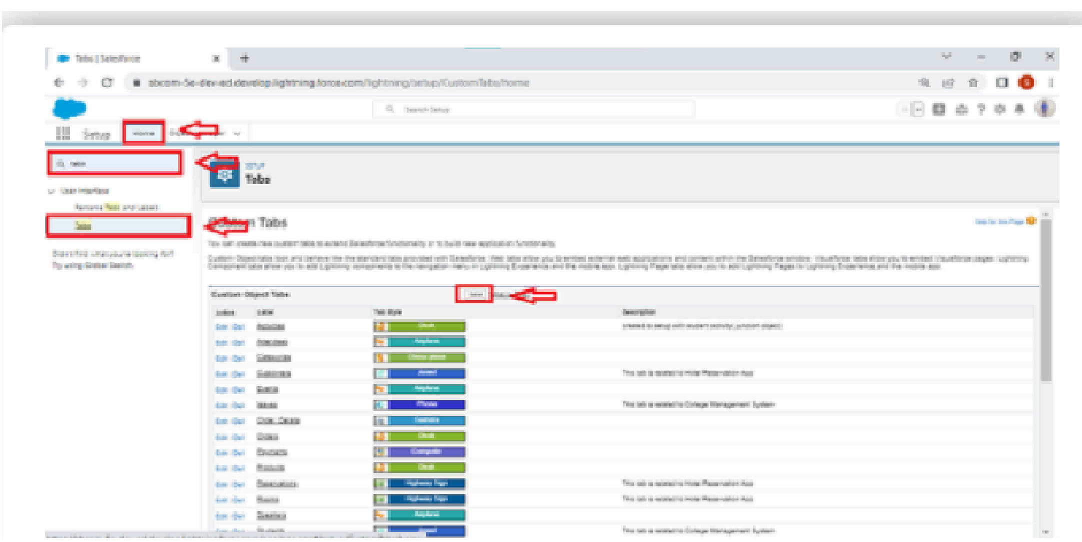
To create an object:

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.

Create Appointment Object

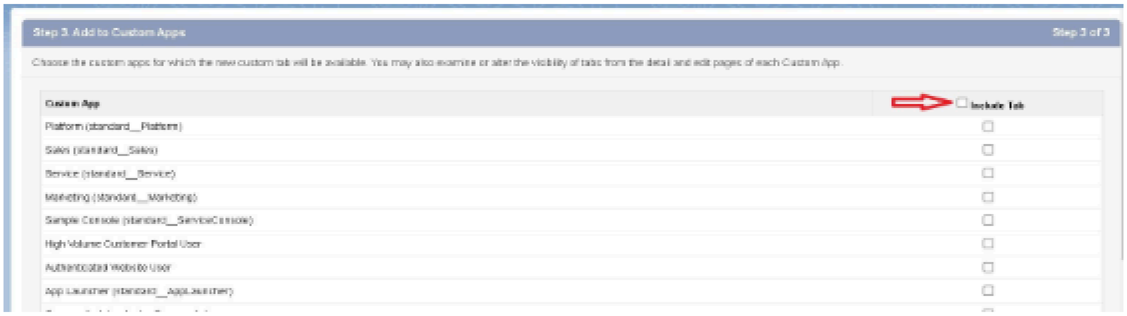
To create an object:

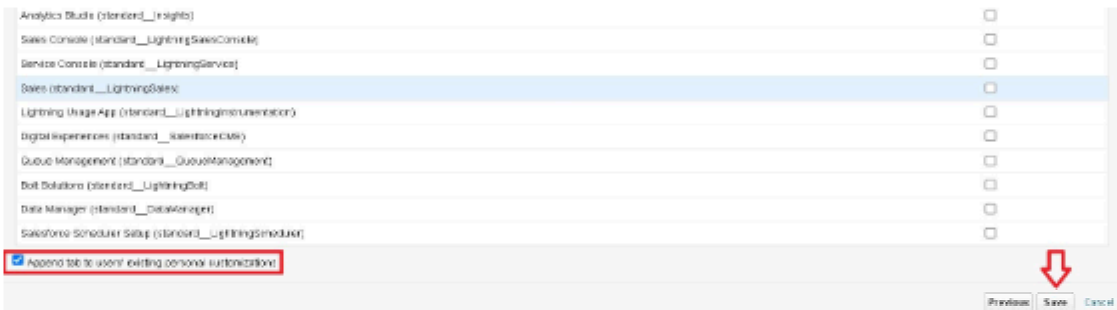
1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
    1. Enter the label name >> Appointment
    2. Plural label name >> Appointments
    3. Enter Record Name Label and Format
        - Record Name >> Appointment Name
        - Data Type >> Auto Number
 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

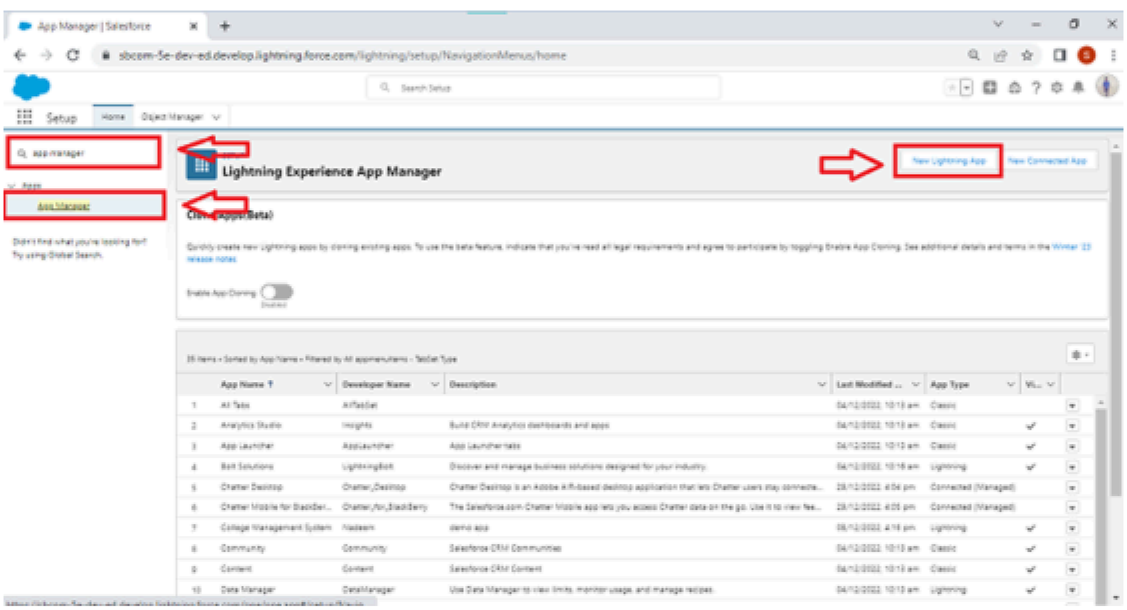


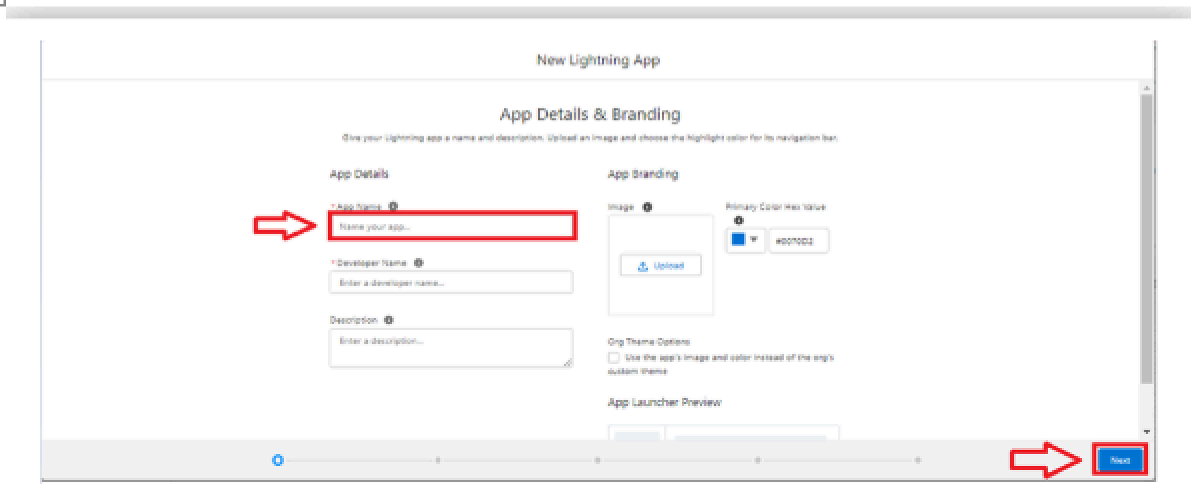

New Custom Object Tab
Help for this Page
Step 1. Enter the Details
Step 1 of 3
Choose the custom object for this new custom tab. Fill in other details.
Select an existing custom object or create a new custom object now
Object
Customer Details
Tab Style
Splash Page Custom Link
--None--
Enter a short description.
Description
Next
Cancel


Tab Style Selector
Create your own style
Hide styles which are used on other tabs
Airplane
Alarm clock
Apple
Balls
Bank[1]
Bell
Big top
Boat[1]
Books
Bottle
Box
Bridge
Building
Building Block
Caduceus
Camera
Can
Car
Castle
CD/DVD
Cell phone
Chalkboard
Chess piece
Chip
Circle
Compass
Computer
Credit card
CRT TV
Cup
Desk[1]
Diamond
Dice
Factory
Fan
Flag
Form
Gears
Globe
Guitar
Hammer
Hands
Handsaw
Headset

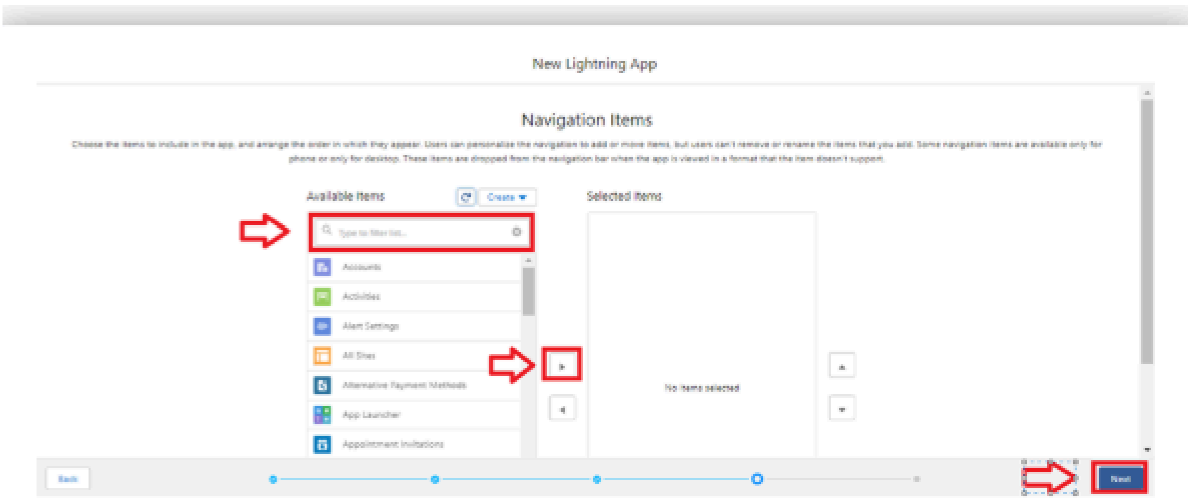

Step 3. Add to Custom Apps
Step 3 of 3
Custom App
Include Tab
Platform (standard__Platform)
Sales (standard__Sales)
Service (standard__Service)
Marketing (standard__Marketing)
Sample Console (standard__ServiceConsole)
High Volume Customer Portal User
Authenticated Website User
App Launcher (standard__AppLauncher)

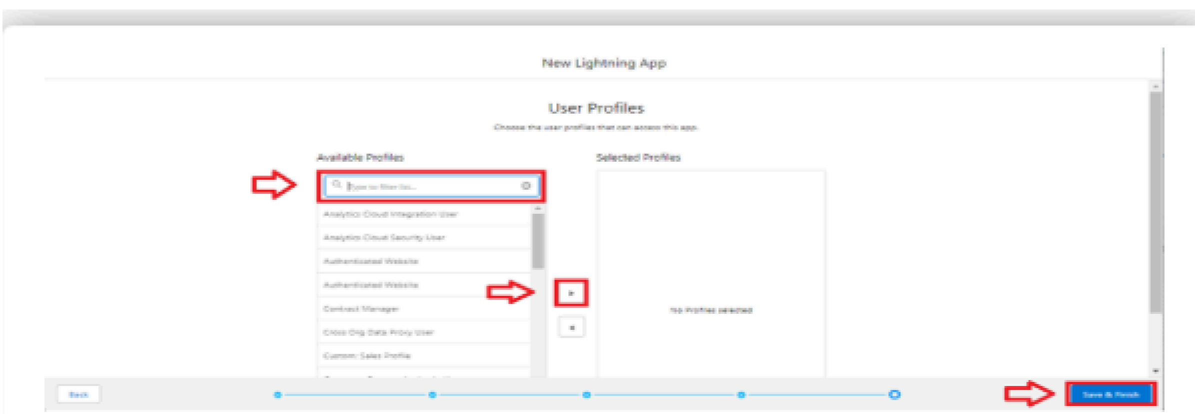

Analytics Studio (standard__Insights)
Sales Console (standard__LightningSalesConsole)
Service Console (standard__LightningService)
Sales (standard__LightningSales)
Lightning Usage App (standard__LightningInstrumentation)
Digital Experiences (standard__SalesforceCMS)
Queue Management (standard__QueueManagement)
Bolt Solutions (standard__LightningBolt)
Data Manager (standard__DataManager)
Salesforce Scheduler Setup (standard__LightningScheduler)
Append tab to users' existing personal customizations
Previous
Save
Cancel


App Manager | Salesforce
Setup
Home
Object Manager
Lightning Experience App Manager
New Lightning App
New Connected App
Enable App Cloning
App Name
Developer Name
Description
App Type

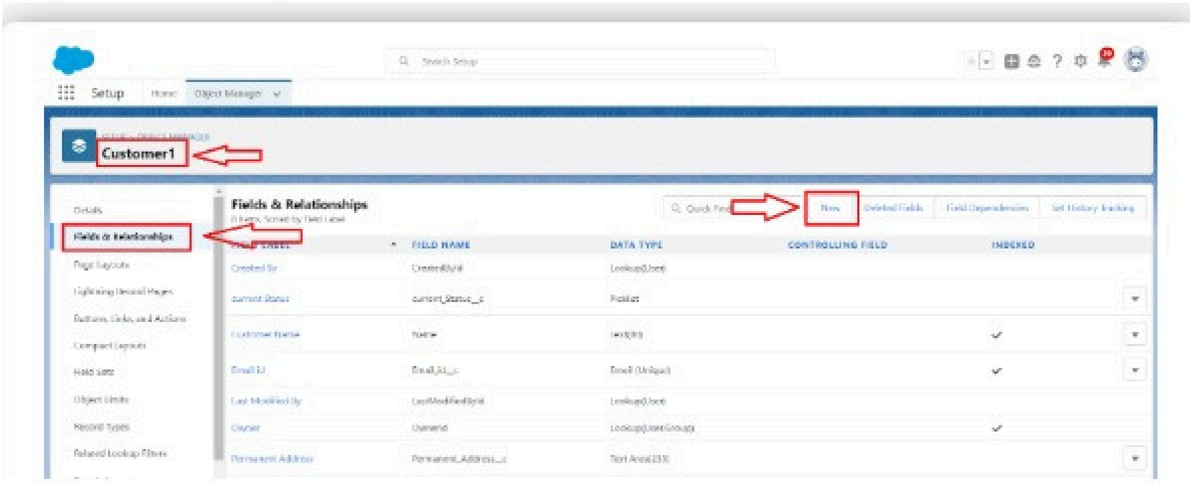


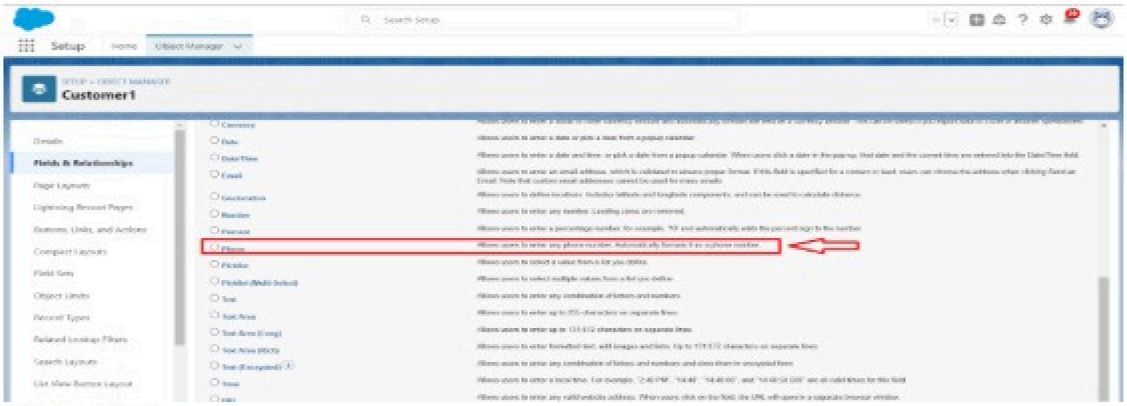
To Add Navigation Items:



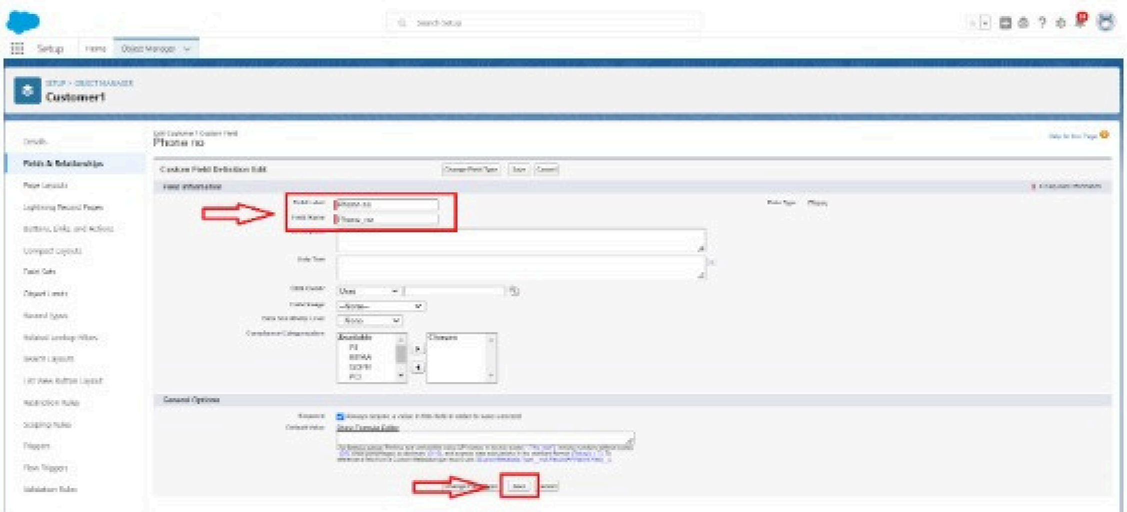


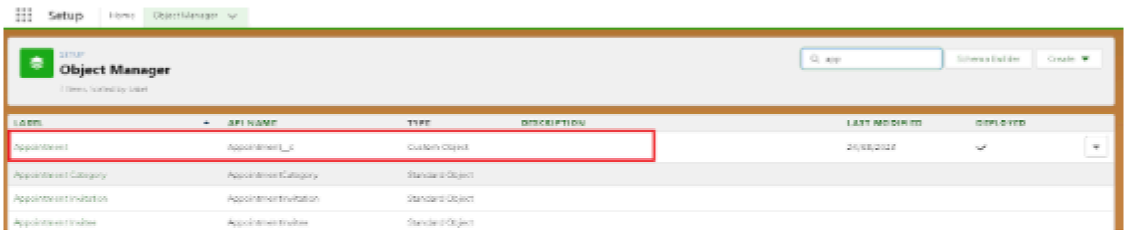
2. Now click on “Fields & Relationships” >> New



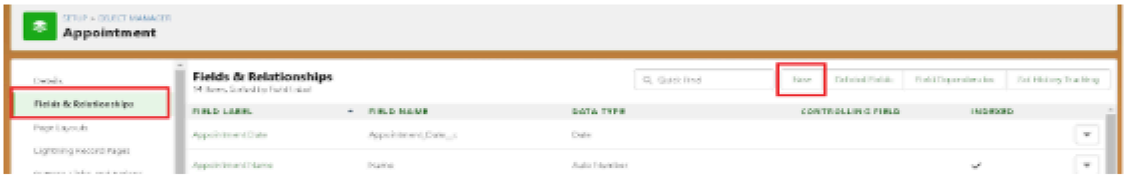


4. Click on next.

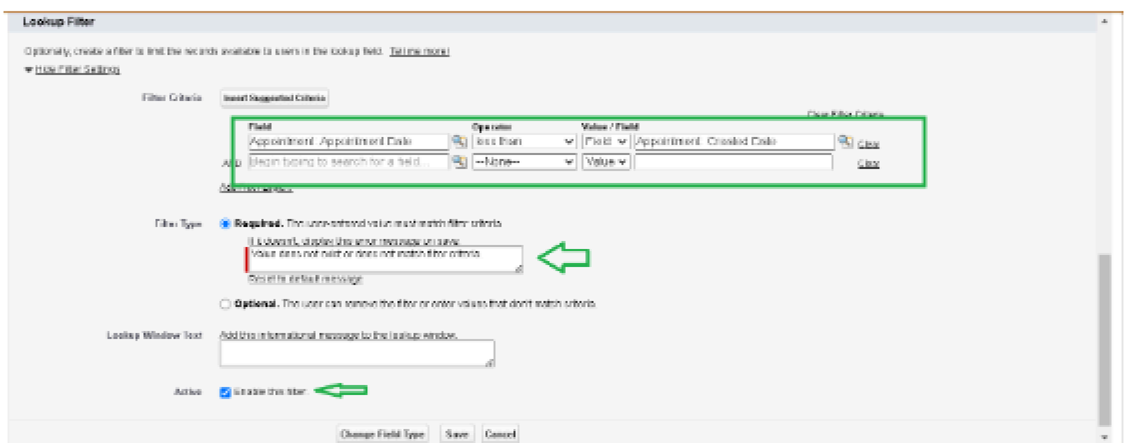


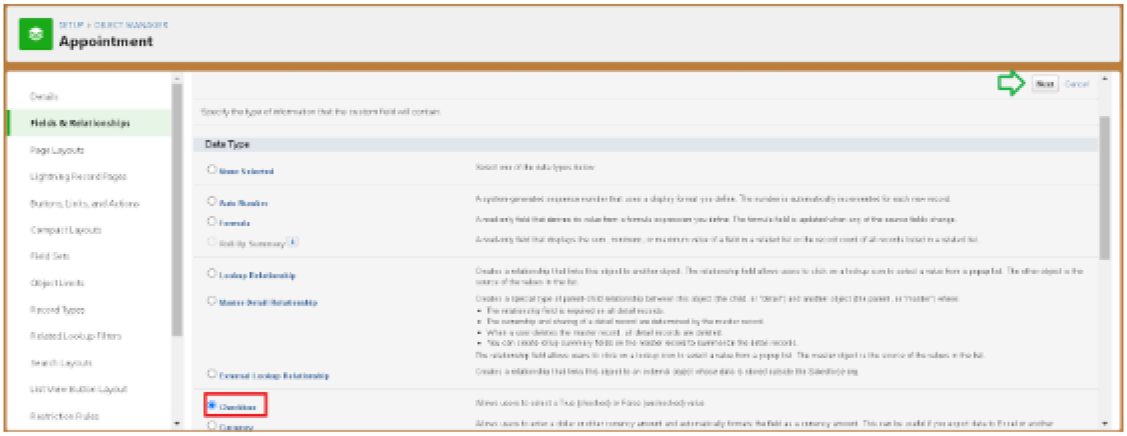


2. Now click on “Fields & Relationships” >> New

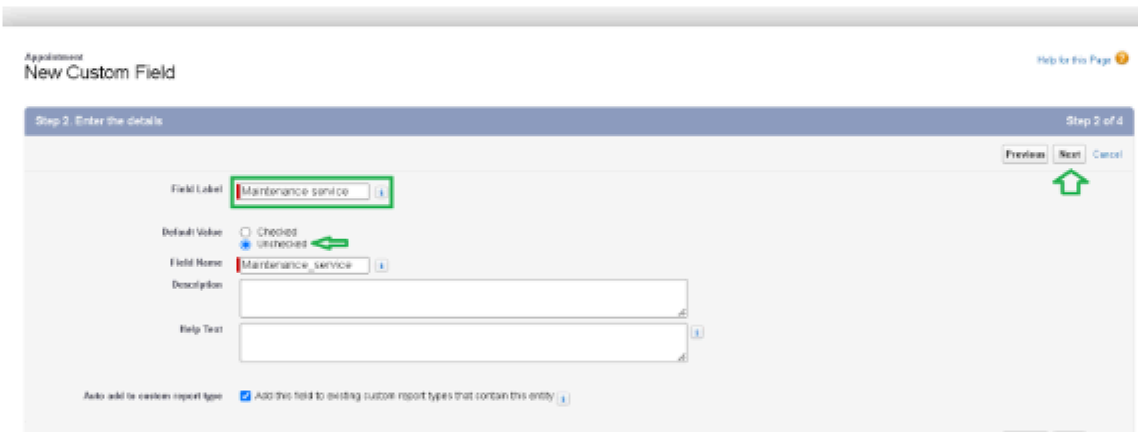


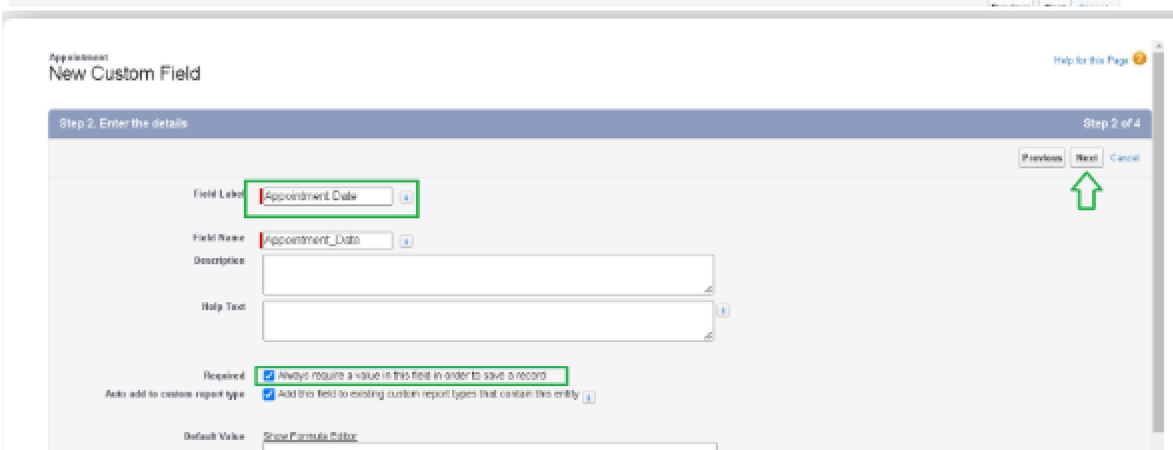
3. Select “Look-up relationship” as data type and click Next.



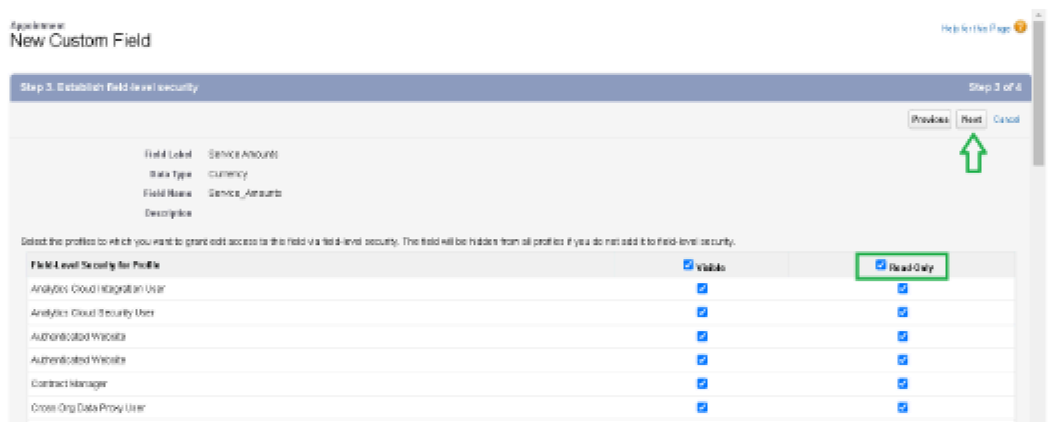


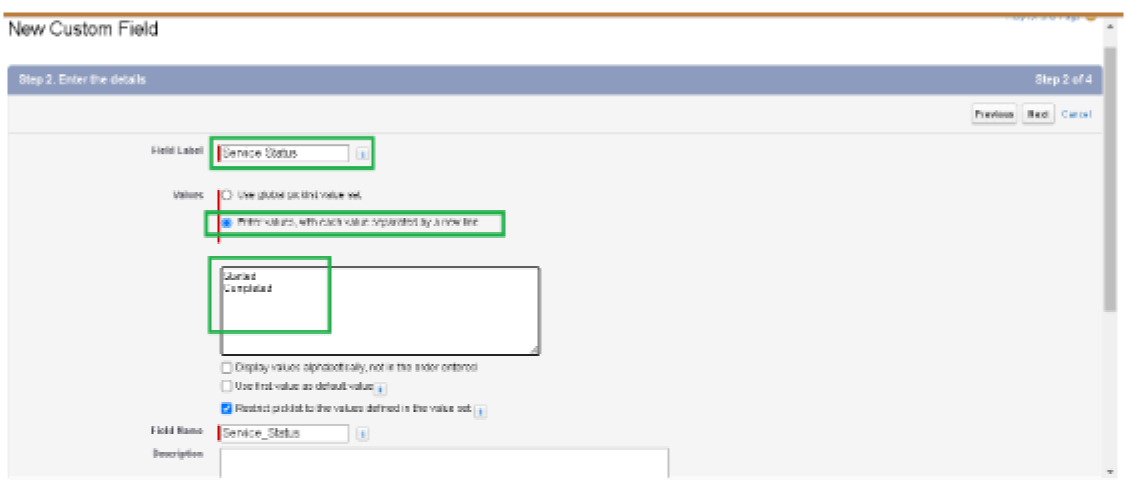
4. Give the Field Label : Maintenance service
5. Field Name : is auto populated
6. Default value : unchecked



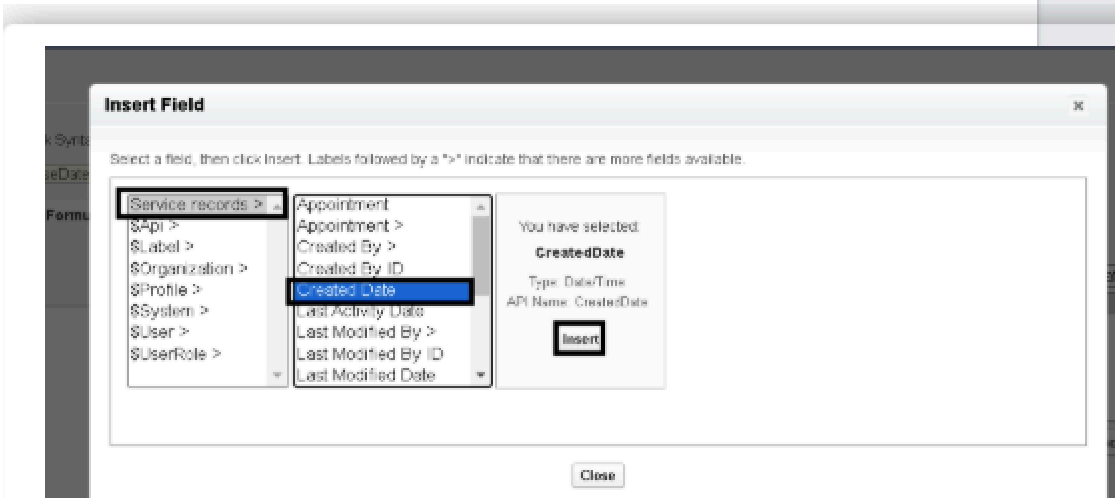


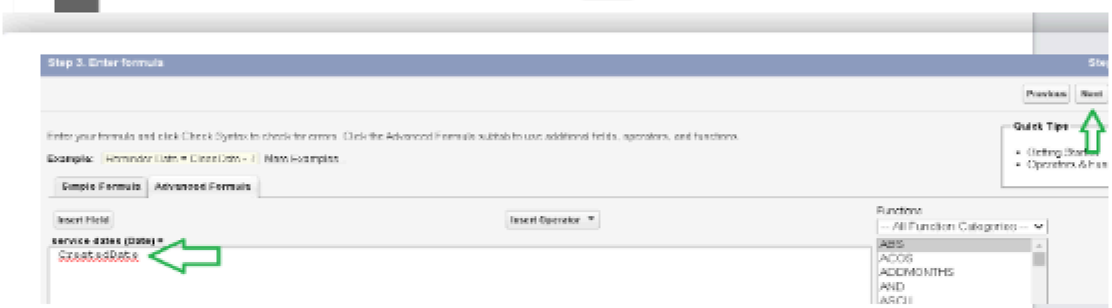
6. Click on next
7. Give read only for all the profiles in field level security for profile.



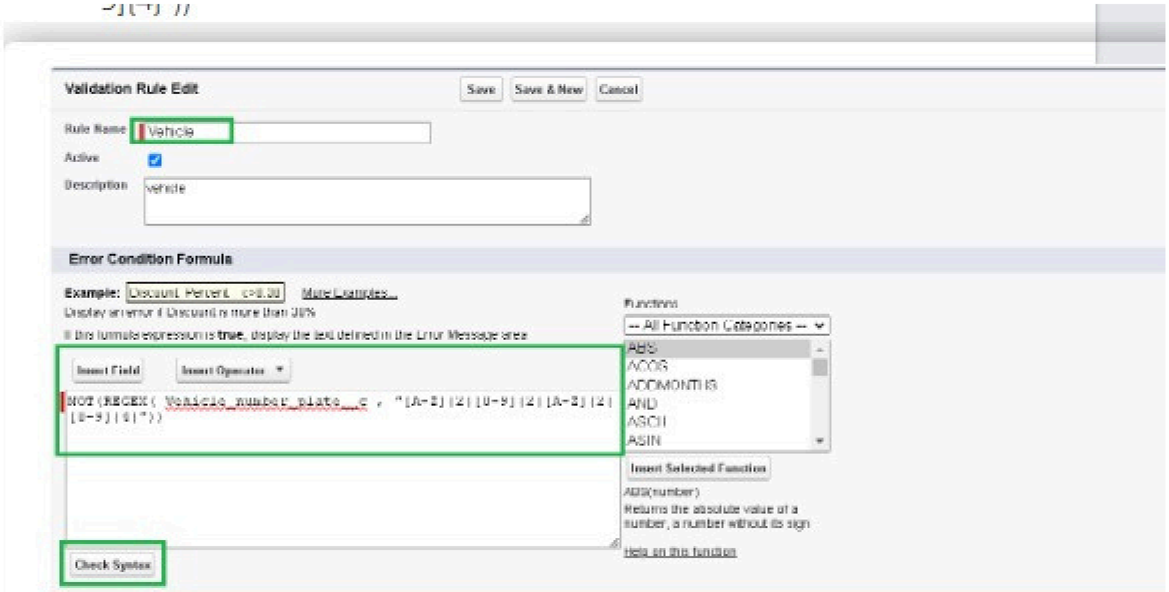


5. Insert field formula should be : CreatedDate

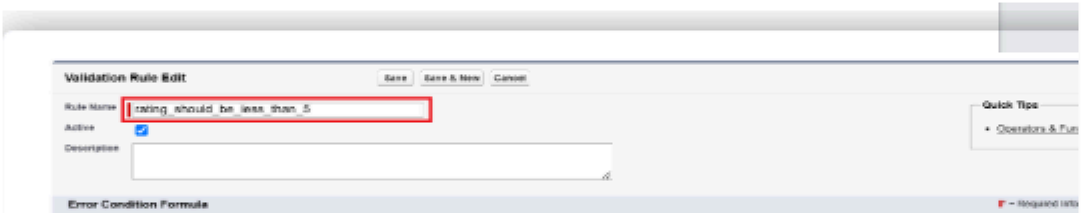




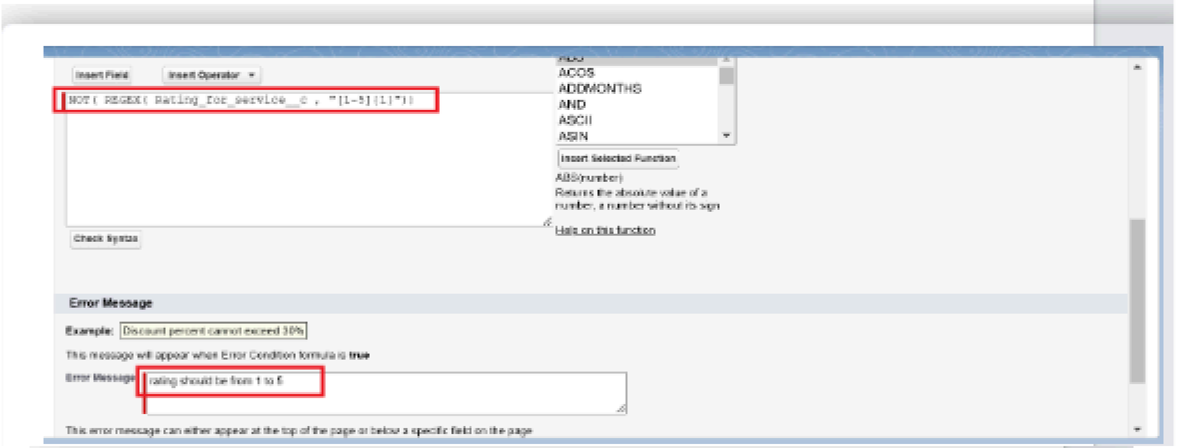
9]{4}"))

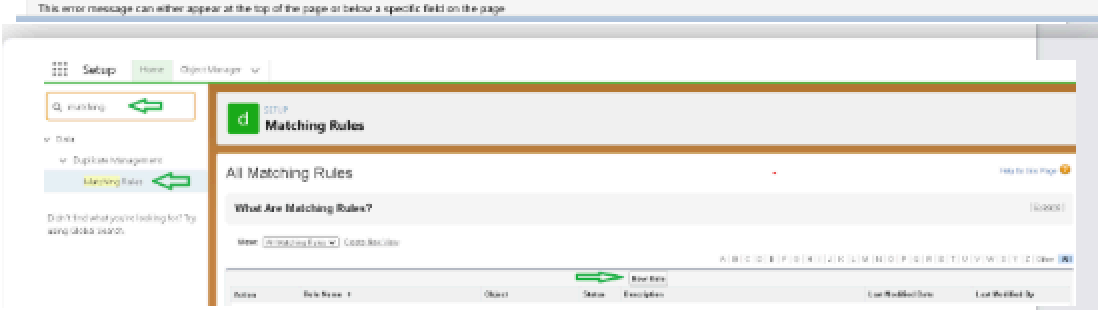


5. Enter the Error Message as “Please enter vaild number ”, select the Error location as Field and select the field as “Vehicle number plate”, and click Save.

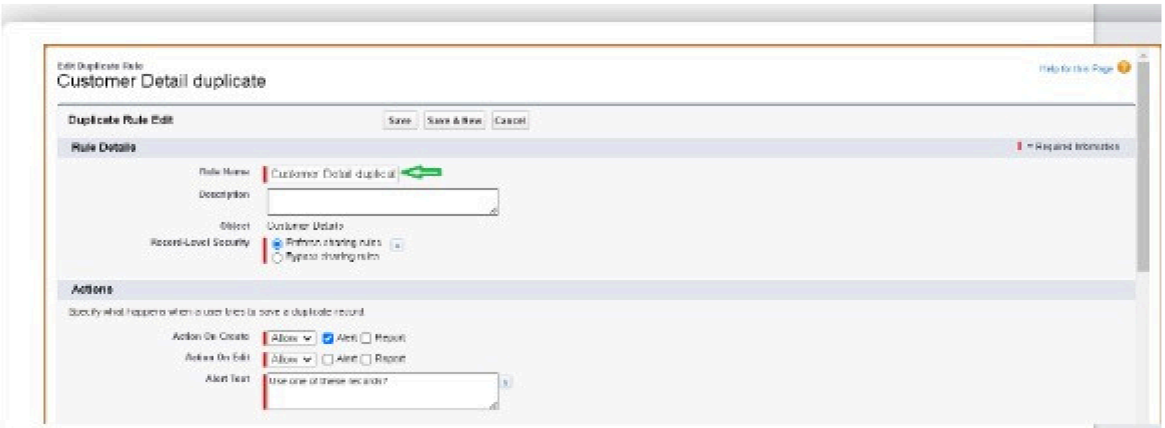


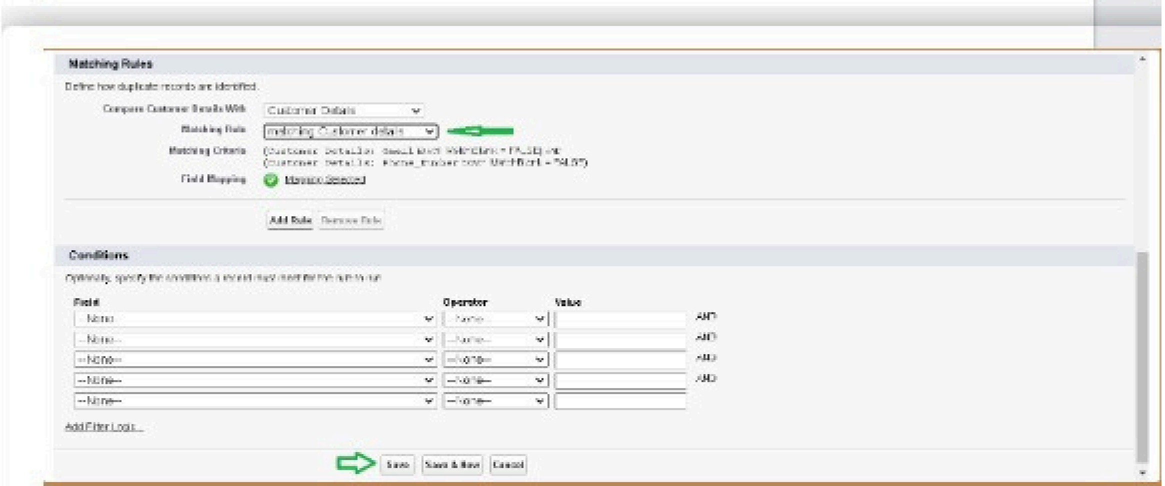
5. Enter the Error Message as "rating should be from 1 to 5", select the Error location as Field and select the field as "Rating for Service", and click Save.



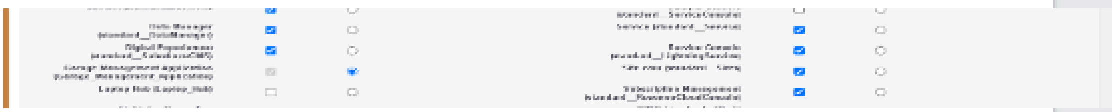


3. Select the object as Customer details and click Next.

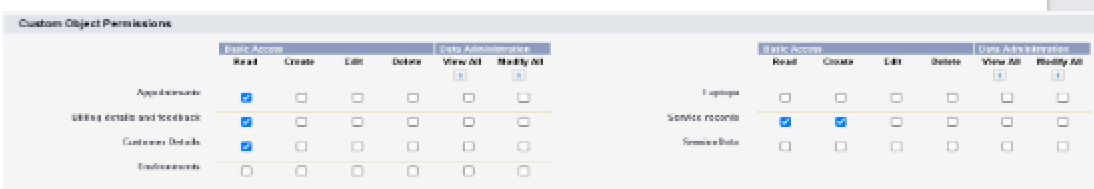

Edit Duplicate Rule
Customer Detail duplicate
Help for this Page
Duplicate Rule Edit
Save
Save & New
Cancel
Rule Details
= Required Information
Rule Name
Customer Detail duplicat
Description
Object
Customer Details
Record-Level Security
Enforce sharing rules
Bypass sharing rules
Actions
Specify what happens when a user tries to save a duplicate record.
Action On Create
Allow
Alert
Report
Action On Edit
Allow
Alert
Report
Alert Text
Use one of these records?


Matching Rules
Define how duplicate records are identified.
Compare Customer Details With
Customer Details
Matching Rule
matching Customer details
Matching Criteria
Field Mapping
Mapping Selected
Add Rule
Remove Rule
Conditions
Field
Operator
Value
--None--
AND
Add Filter Logic...
Save
Save & New
Cancel

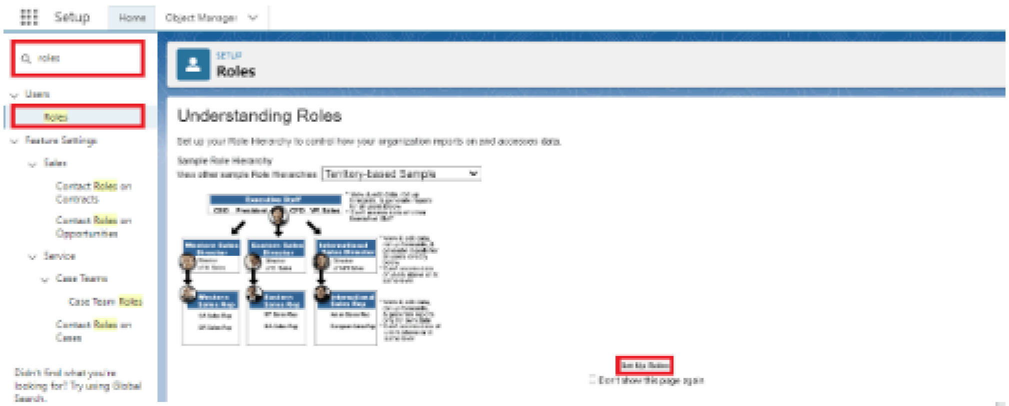
3. Select the Custom App settings as default for the Garage management.



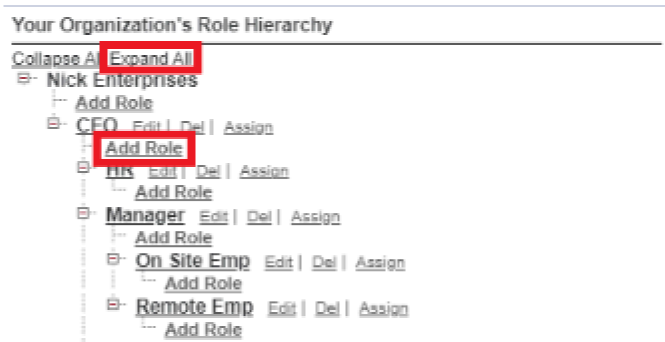
4. Scroll down to Custom Object Permissions and Give access permissions for Appointments,Billing details and feedback , service records and customer details objects as mentioned in the below diagram.

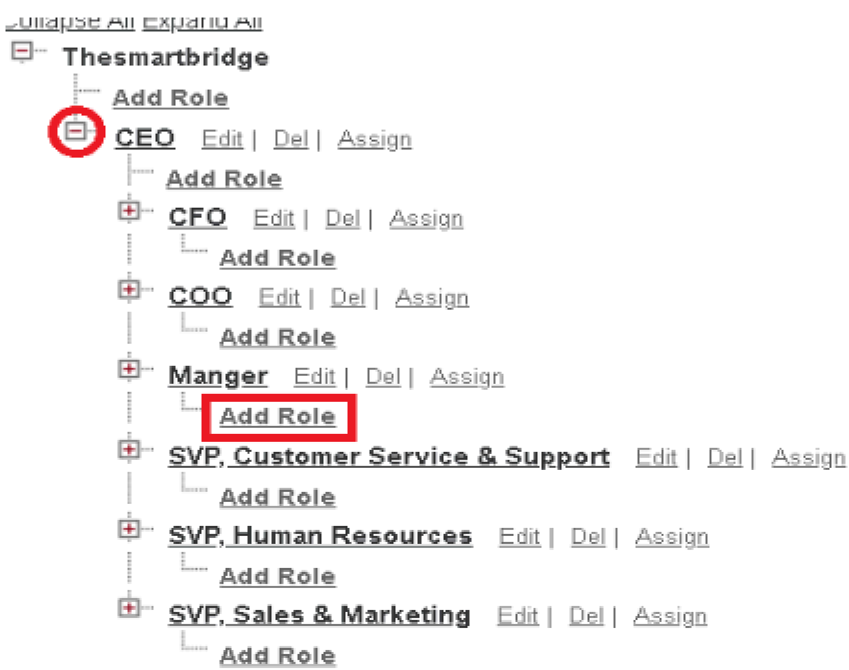


5. And click save.



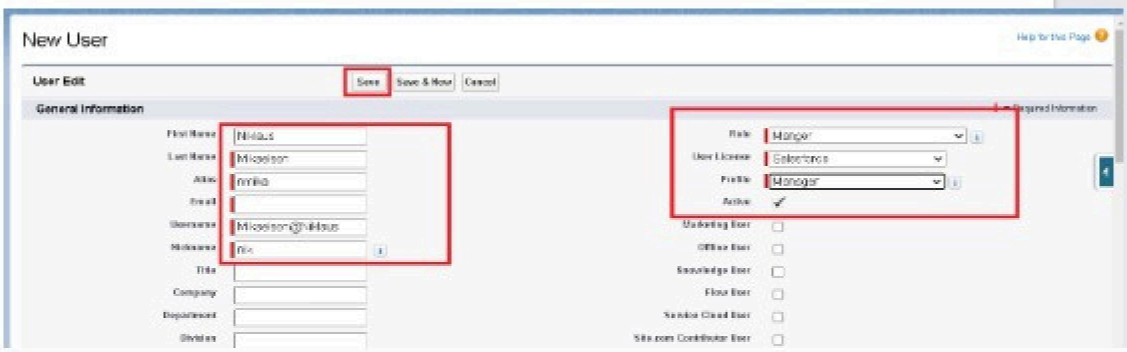
lick on Expand All and click on add role under whom this role
orks.

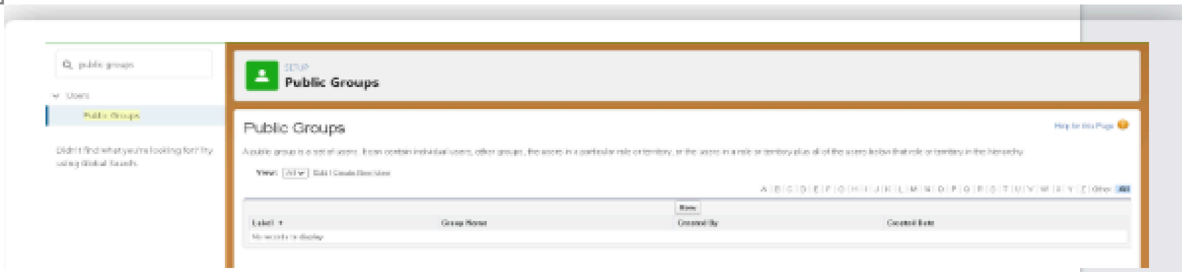




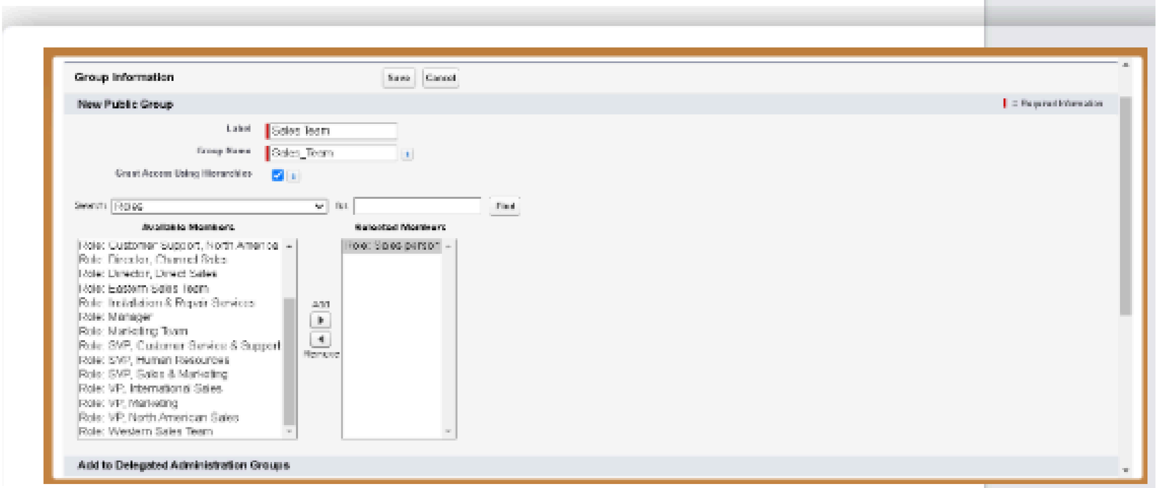
:reate User

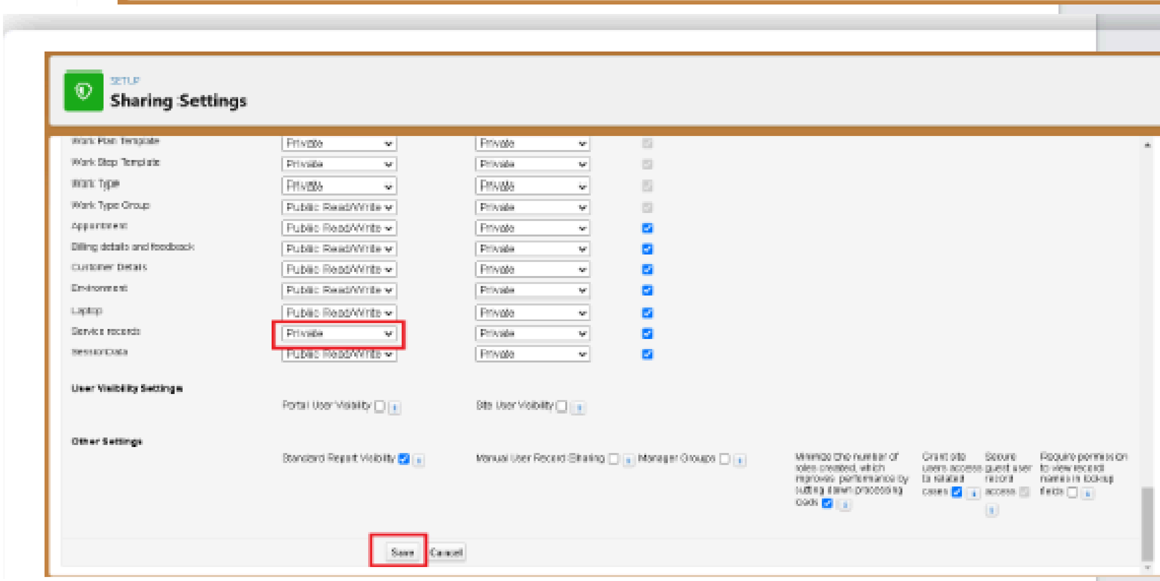
1. Go to setup >> type users in quick find box >> select users >> click New user.
2. Fill in the fields
    1. First Name : Niklaus
    2. Last Name : Mikaelson
    3. Alias : Give a Alias Name
    4. Email id : Give your Personal Email id
    5. Username : Username should be in this form: text@text.text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

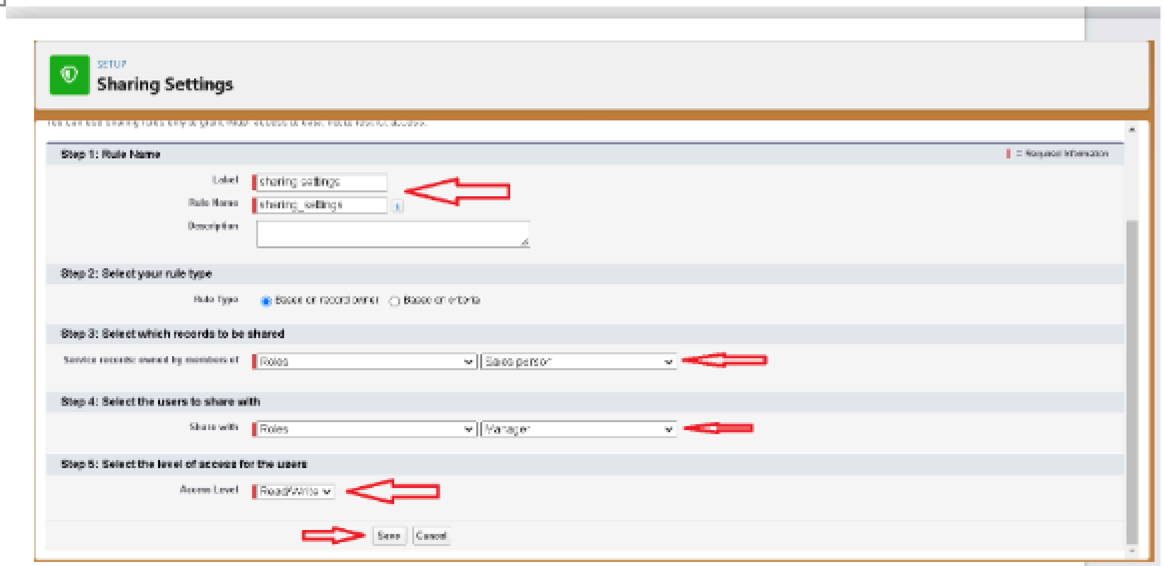


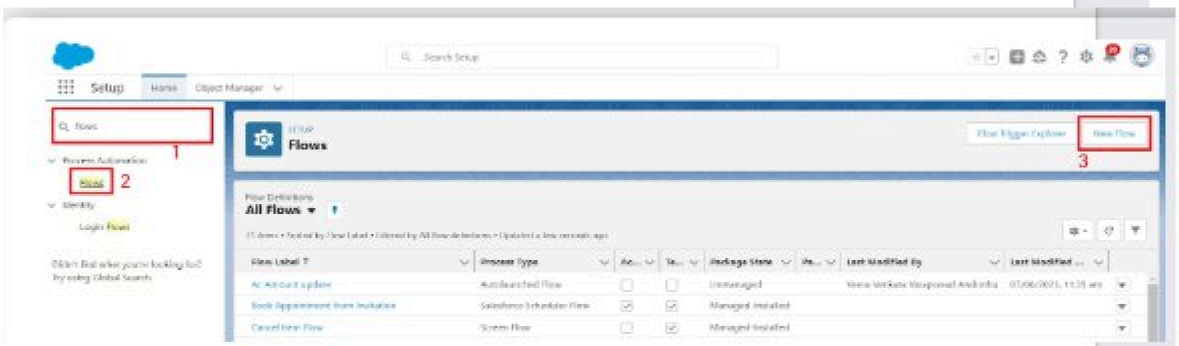


2. Give the Label as "sales team".
3. Group name is autopopulated.
4. Search for Roles.
5. In Available Members select Sales person and click on add it will be moved to selected member.
6. Click on save.

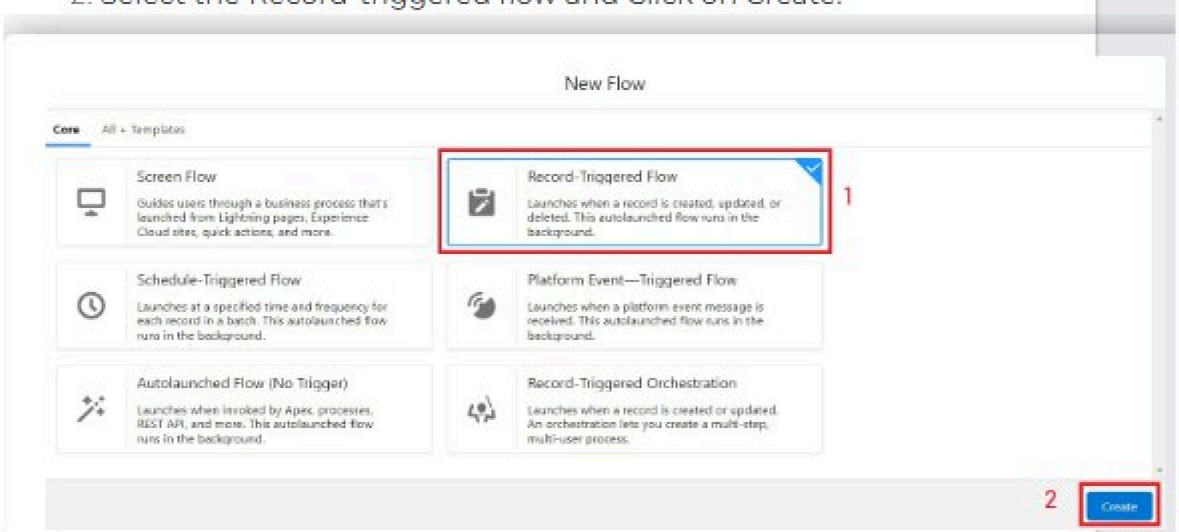


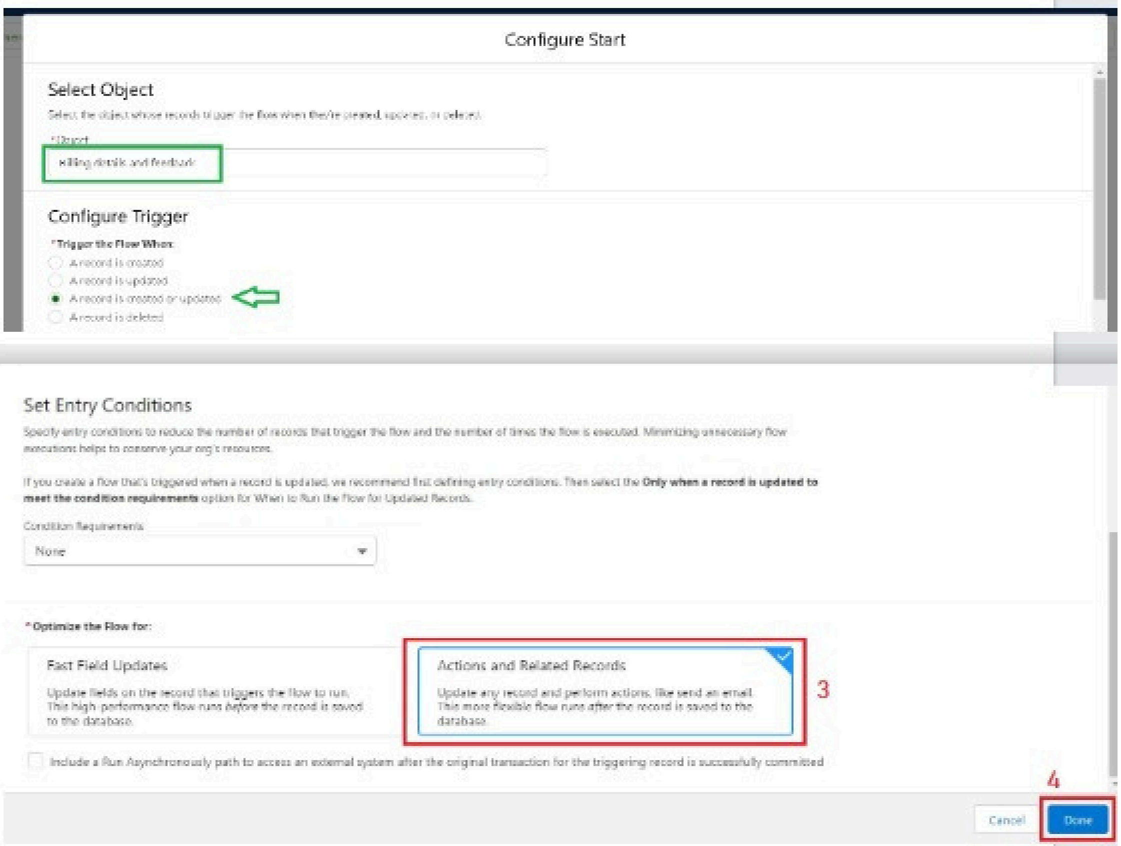


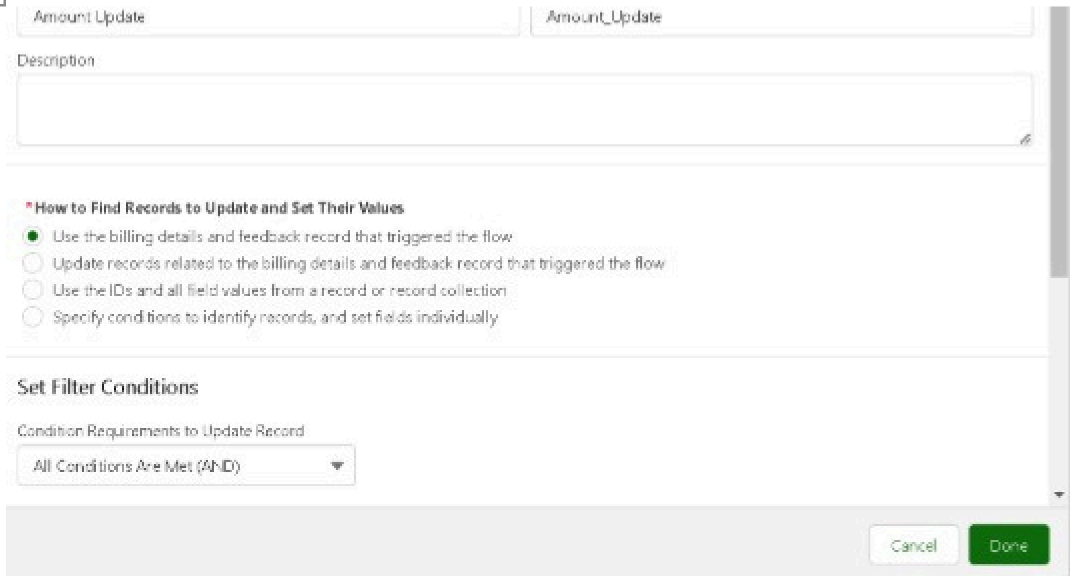


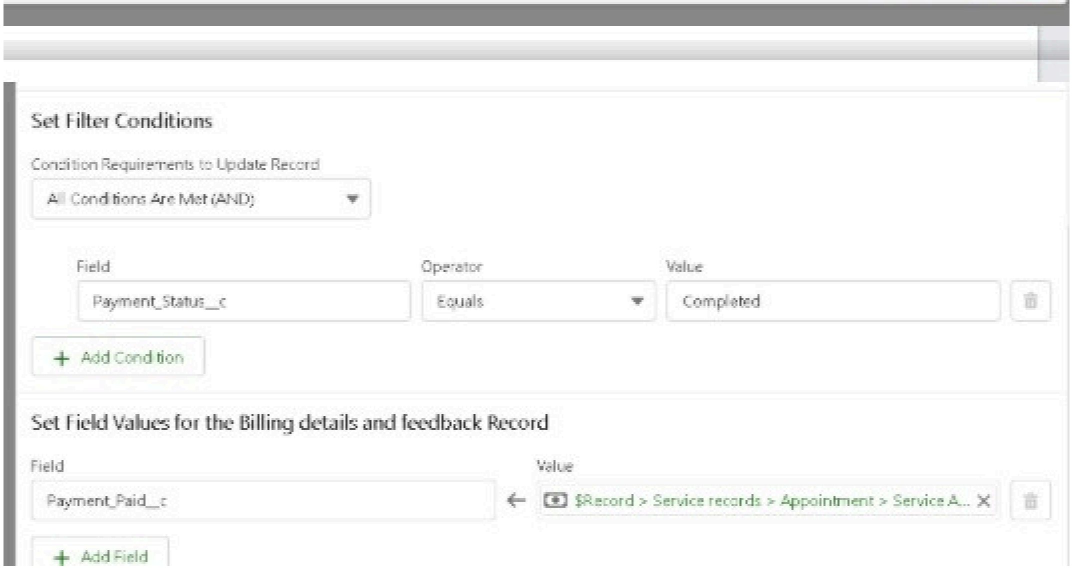


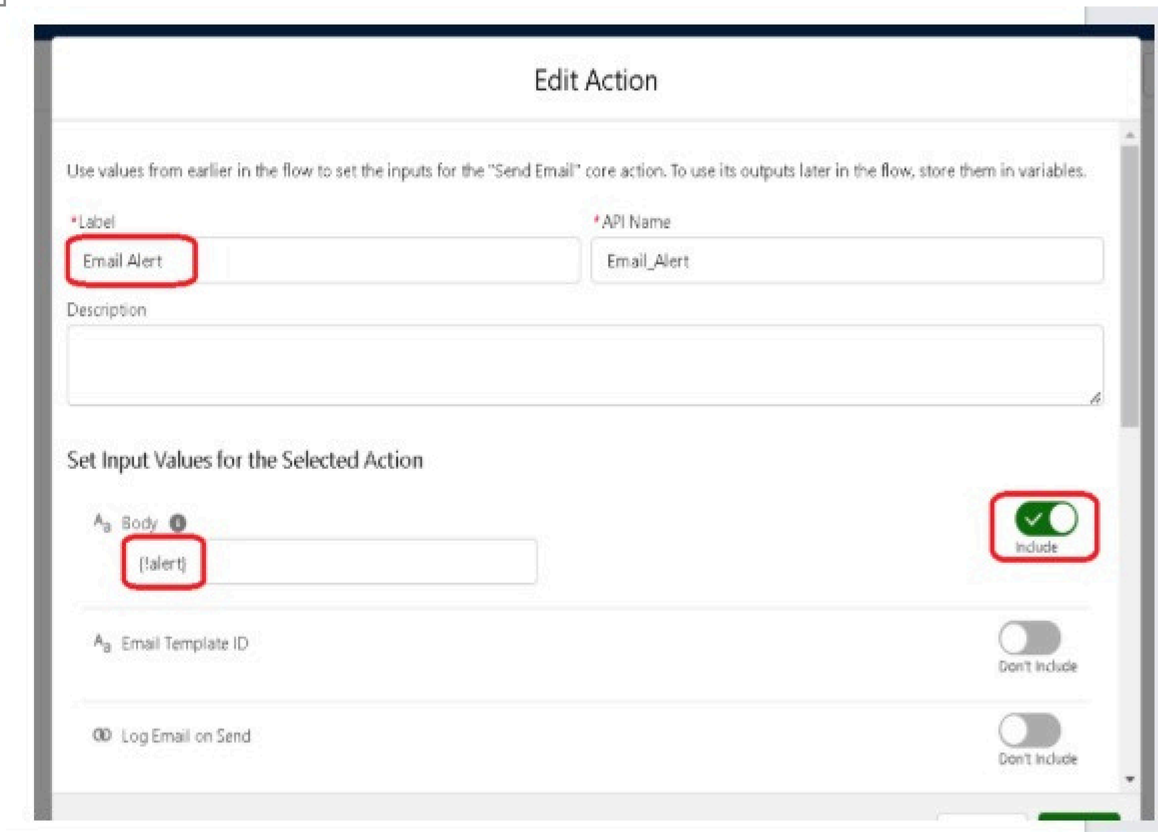
2. Select the Record-triggered flow and Click on Create.

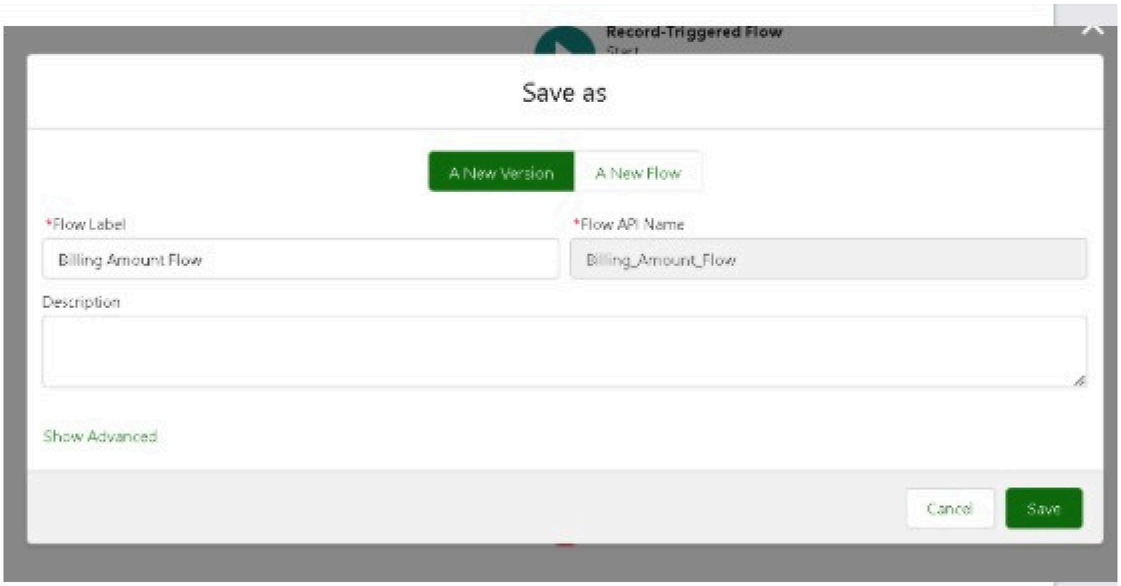


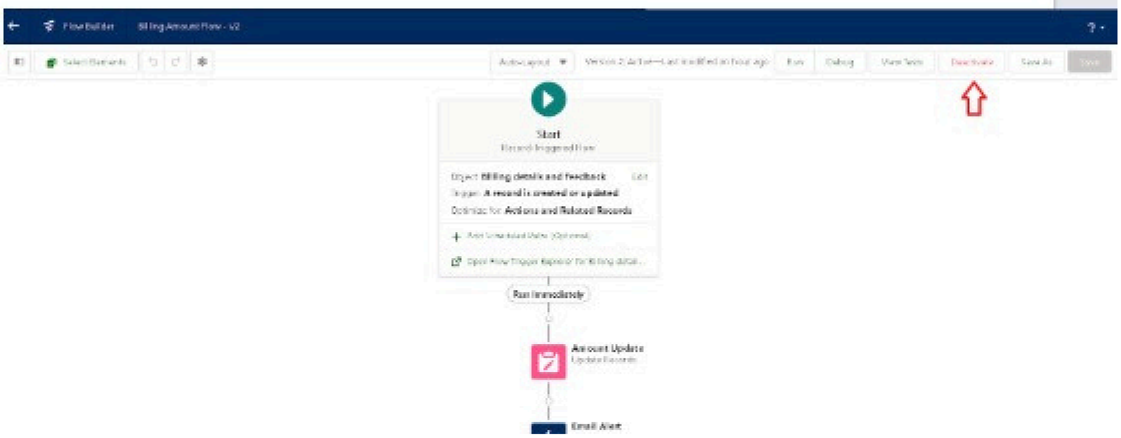

Configure Start
Select Object
Select the object whose records trigger the flow when they're created, updated, or deleted.
*Object
Billing details and feedback
Configure Trigger
*Trigger the Flow When:
A record is created
A record is updated
A record is created or updated
A record is deleted
Set Entry 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.
3
Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed
4
Cancel
Done

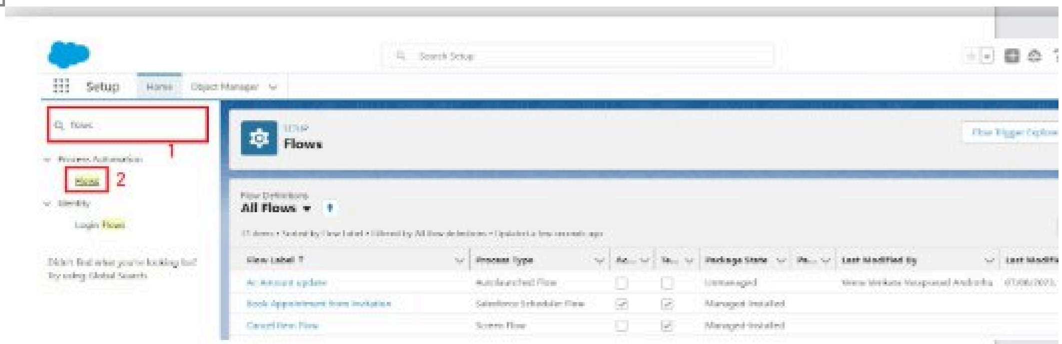

Amount Update
Amount_Update
Description
*How to Find Records to Update and Set Their Values
Use the billing details and feedback record that triggered the flow
Update records related to the billing details and feedback record that triggered the flow
Use the IDs and all field values from a record or record collection
Specify conditions to identify records, and set fields individually
Set Filter Conditions
Condition Requirements to Update Record
All Conditions Are Met (AND)
Cancel
Done


Set Filter Conditions
Condition Requirements to Update Record
All Conditions Are Met (AND)
Field
Operator
Value
Payment_Status__c
Equals
Completed
Add Condition
Set Field Values for the Billing details and feedback Record
Field
Value
Payment_Paid__c
$Record > Service records > Appointment > Service A...
Add Field

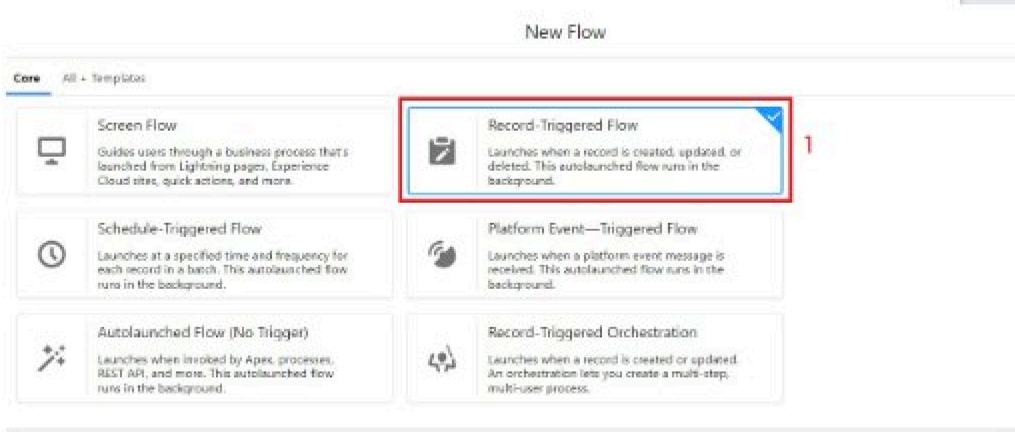

Edit Action
Use values from earlier in the flow to set the inputs for the "Send Email" core action. To use its outputs later in the flow, store them in variables.
*Label
Email Alert
*API Name
Email_Alert
Description
Set Input Values for the Selected Action
Body
{!alert}
Include
Email Template ID
Don't Include
Log Email on Send
Don't Include

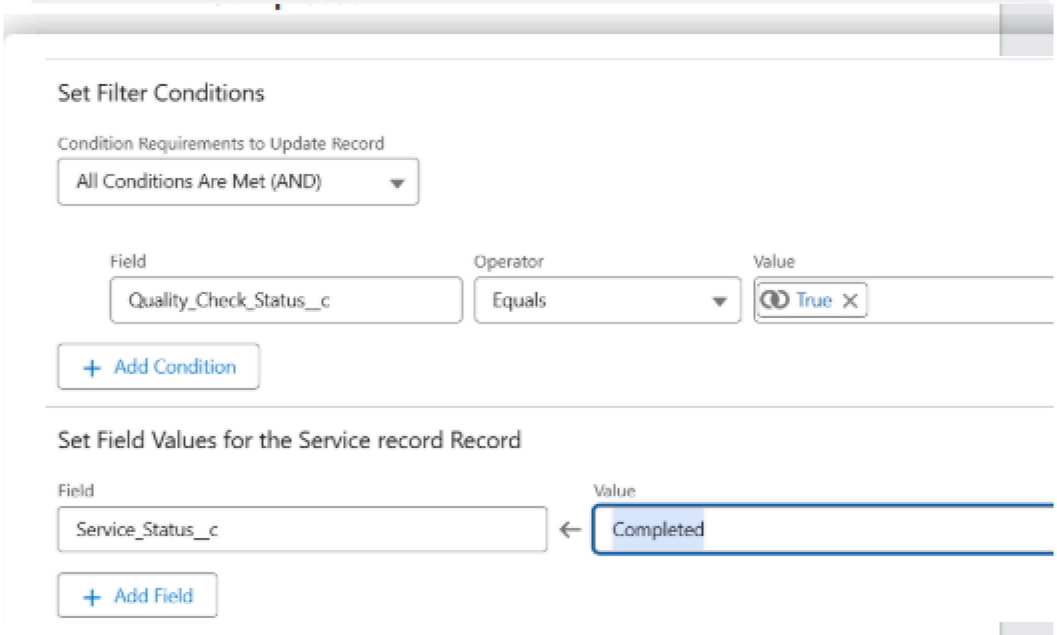

Record-Triggered Flow
Save as
A New Version
A New Flow
*Flow Label
Billing Amount Flow
*Flow API Name
Billing_Amount_Flow
Description
Show Advanced
Cancel
Save


Start
Object: Billing details and feedback
Trigger: A record is created or updated
Optimize for: Actions and Related Records
Run Immediately
Amount Update
Email Alert



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





AmountDistribution.apxt × AmountDistributionHandler.apxc * ×

Code Coverage: None ▾ API Version: 50

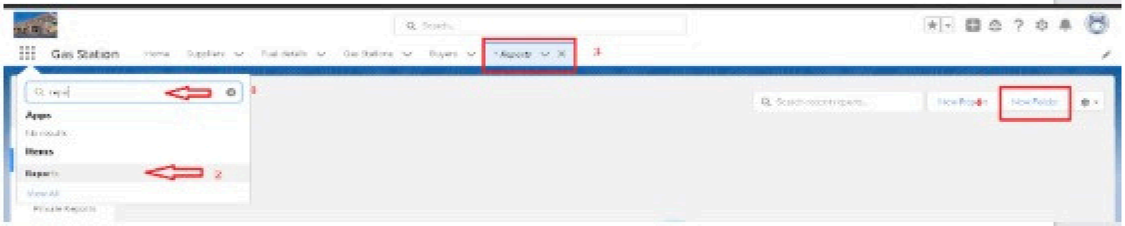
```
public class AmountDistributionHandler {

    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;
```

AmountDistribution.apxt × AmountDistributionHandler.apxc * ×

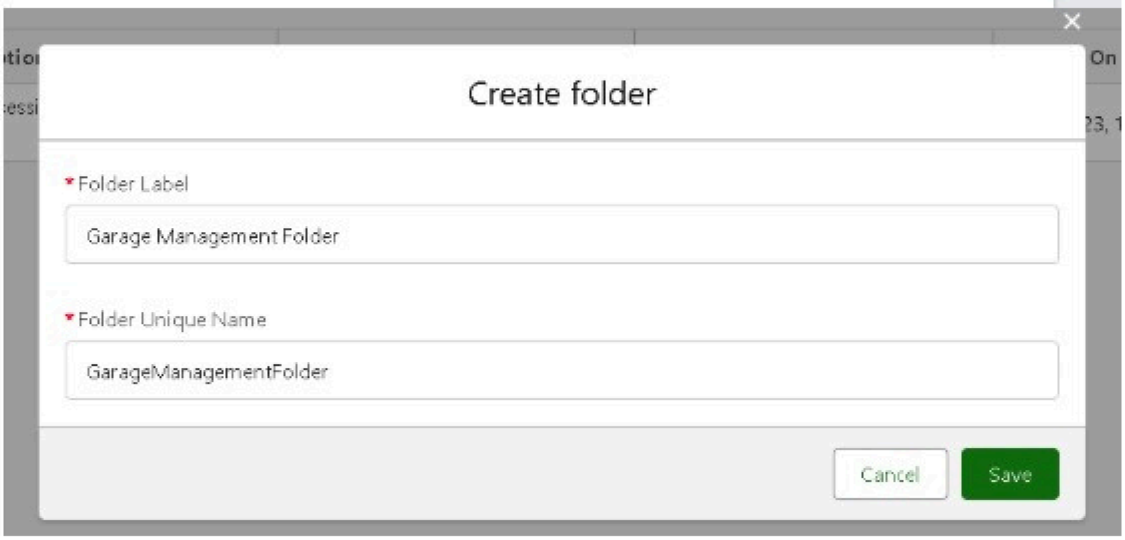
Code Coverage: None ▾ API Version: 50

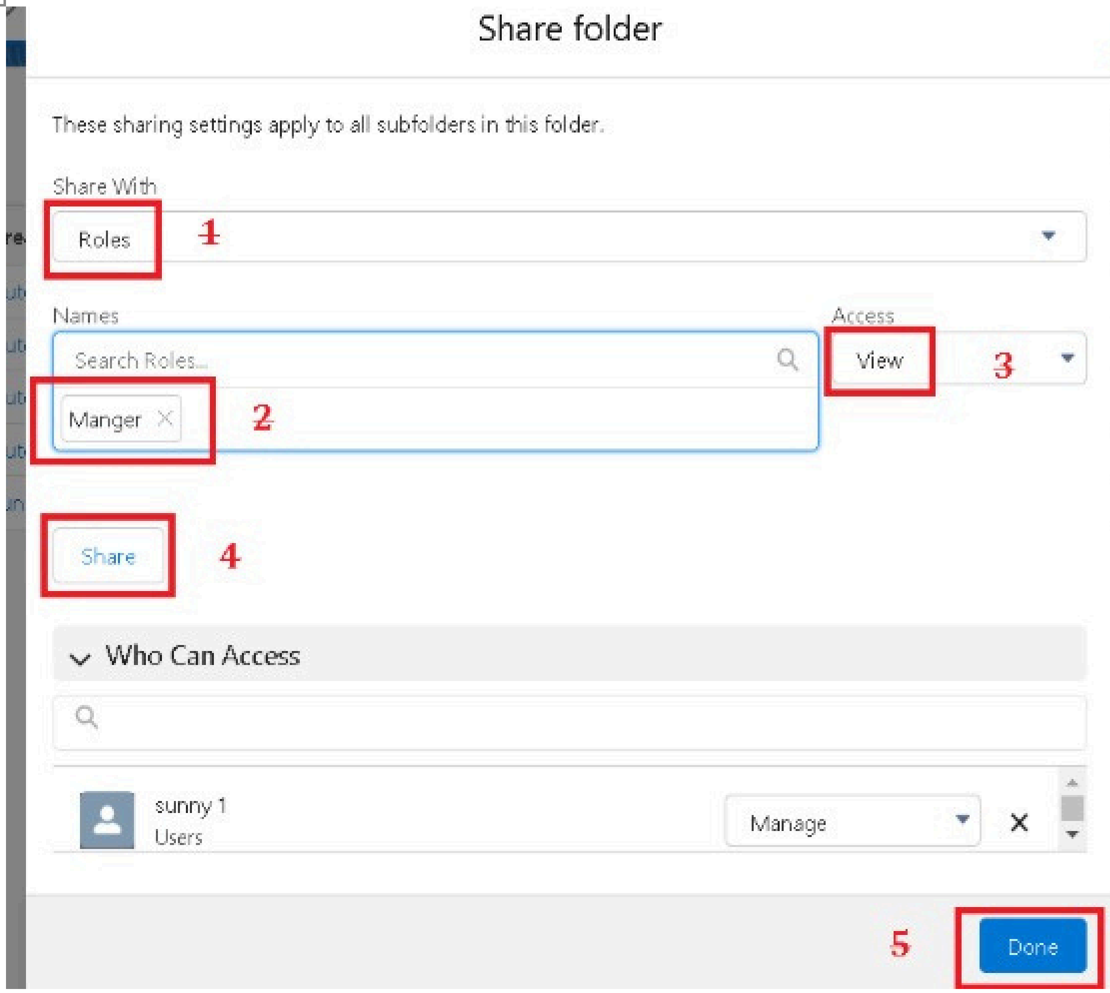
```
            }
            else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
                app.Service_Amount__c = 8000;
            }
            else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
                app.Service_Amount__c = 7000;
  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

        }
    }
}
```

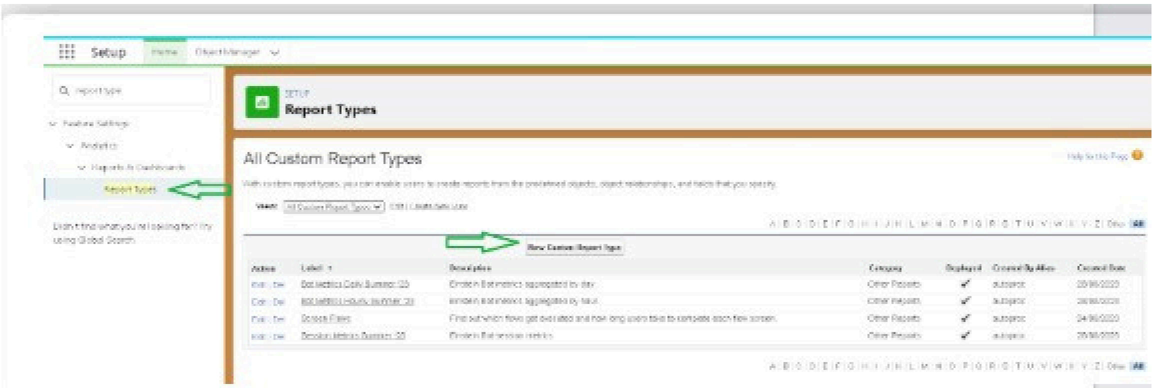
1. Click on the app launcher and search for reports.
2. Click on the report tab, click on new folder.



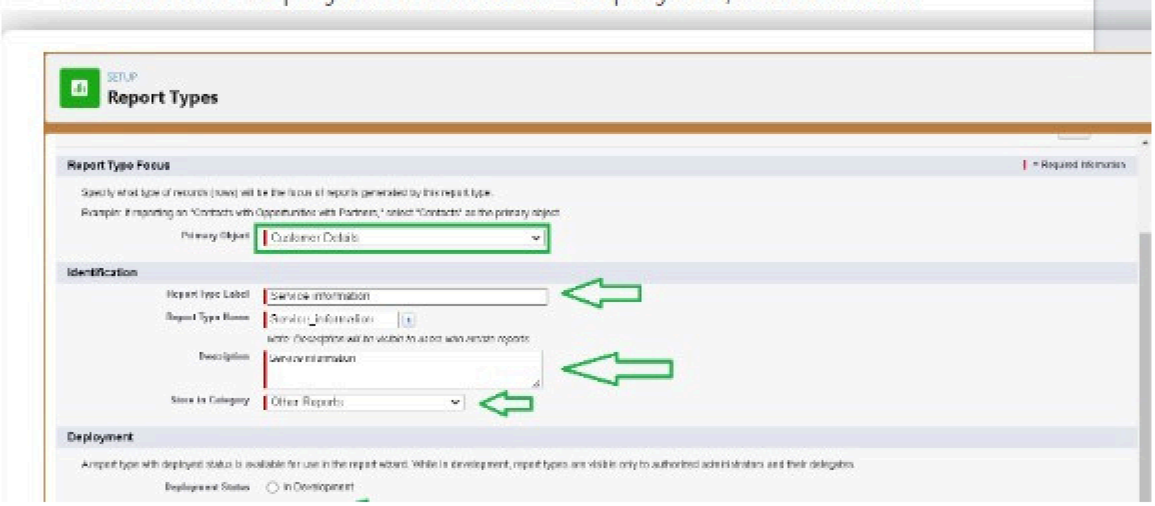
3. Give the Folder label as “Garage Management Folder”, Folder unique name will be auto populated.
4. Click save.



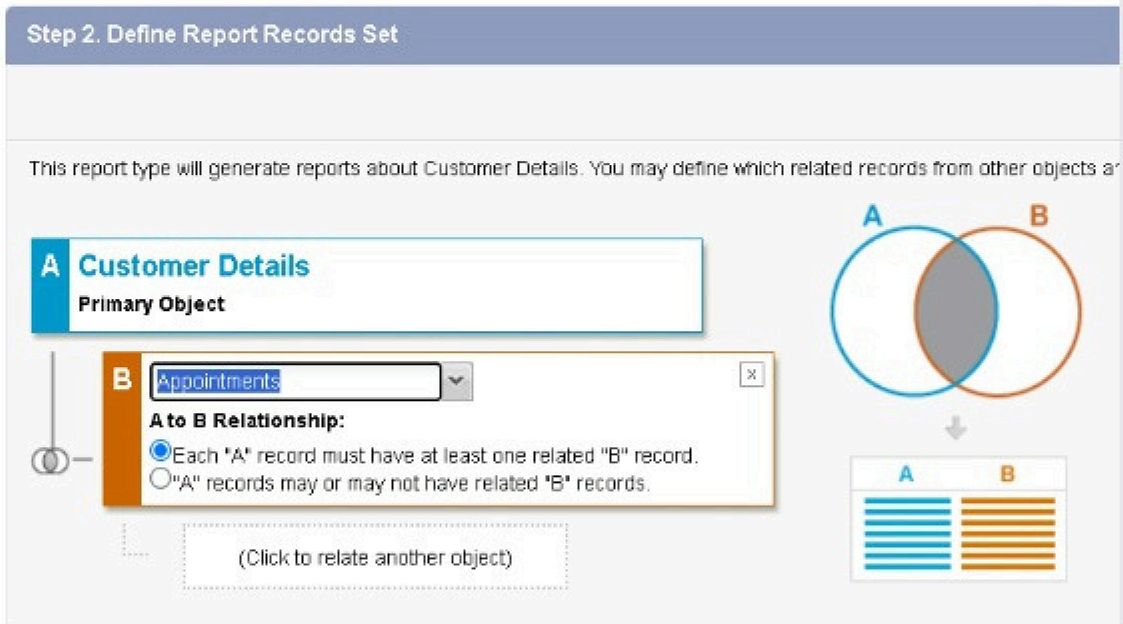

Share folder
These sharing settings apply to all subfolders in this folder.
Share With
Roles
1
Names
Search Roles...
Manger
2
Access
View
3
Share
4
Who Can Access
sunny 1
Users
Manage
5
Done

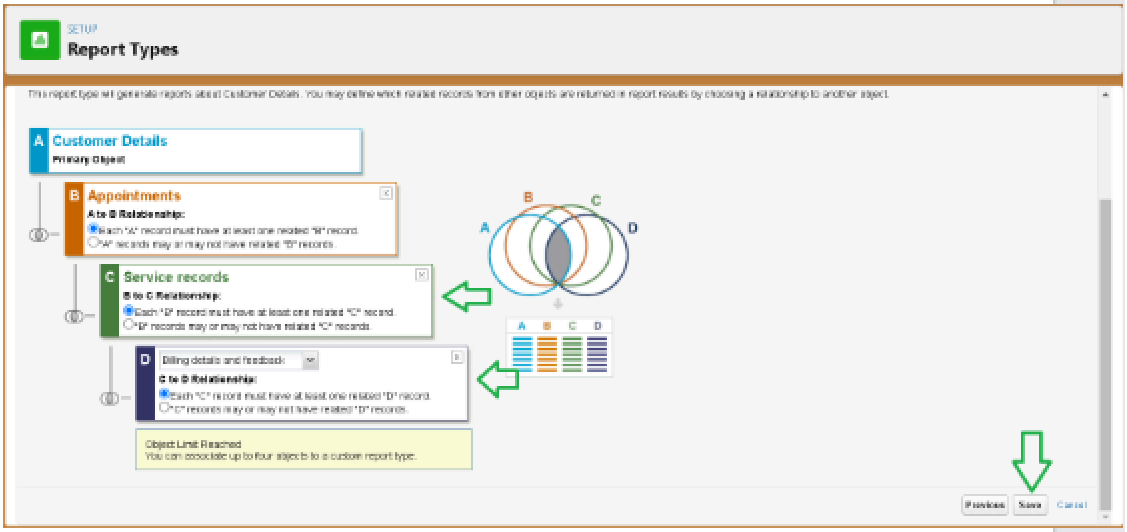


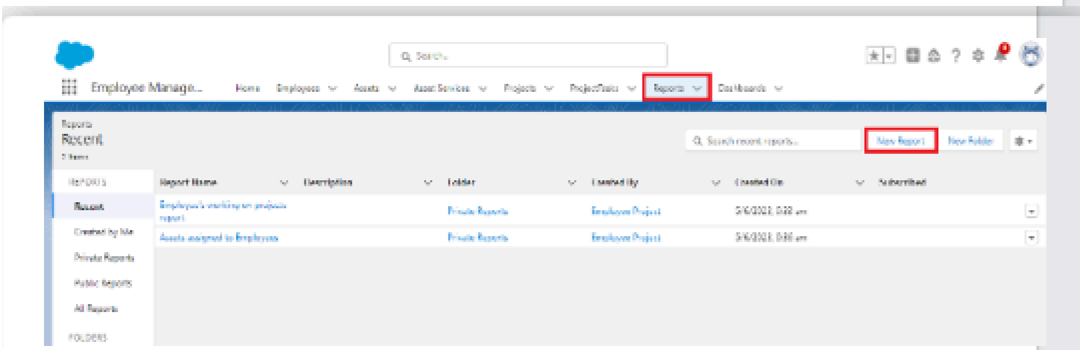
3. Select the Primary object as " Customer details" .
4. Give the Report type Label as " Service information "
5. Report type Name is autopopulated.
6. Keep the Description as same.
7. Select Store in Category as " other Reports "
8. Select the deployment status as " Depolyed ", click on Next.



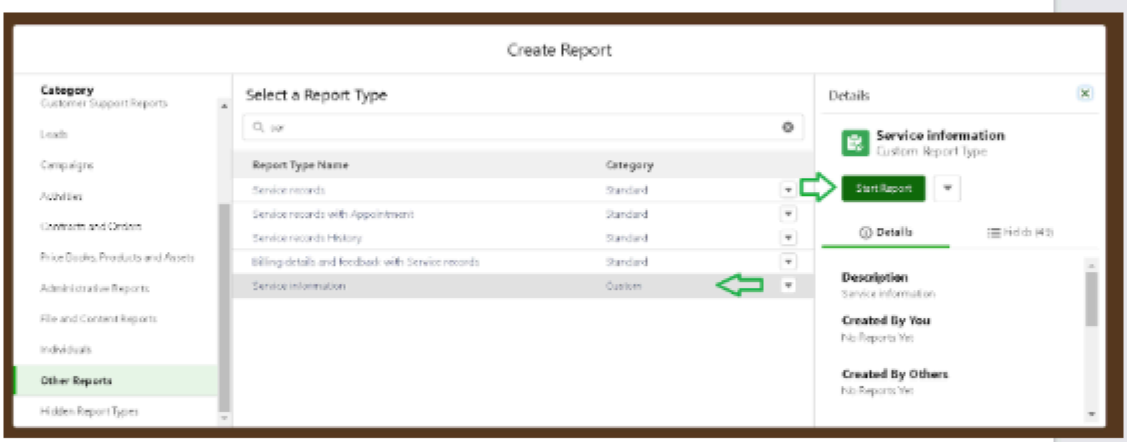

New Custom Report Type
Service information
Help for this Page
Step 2. Define Report Records Set
Step 2 of 2
Previous
Save
Cancel
A
Customer Details
Primary Object
B
--Select Object--
Activities
Appointments
Duplicate Record Items
A
B

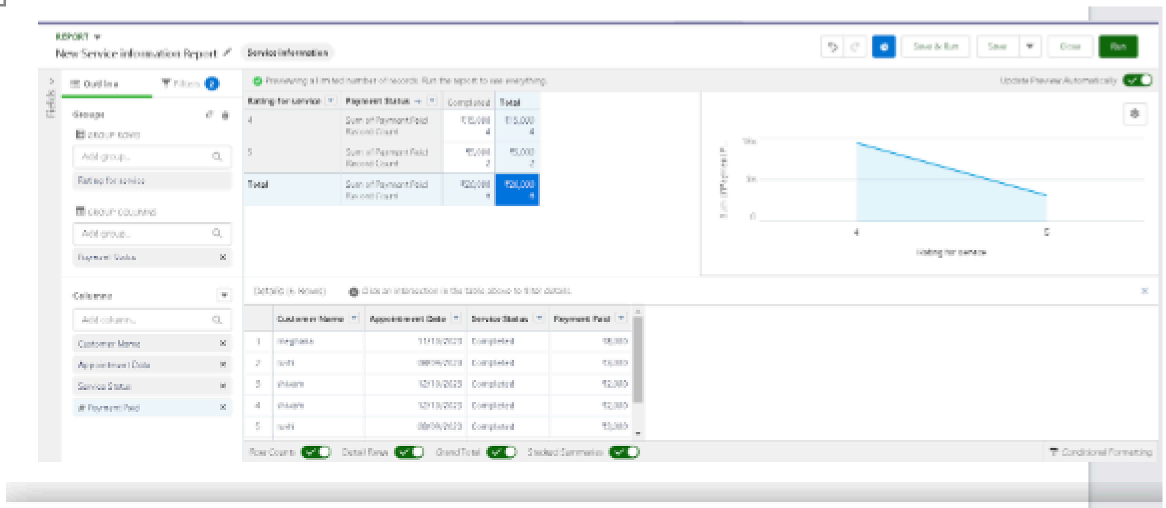

Step 2. Define Report Records Set
This report type will generate reports about Customer Details. You may define which related records from other objects a
A
Customer Details
Primary Object
B
Appointments
A to B Relationship:
Each "A" record must have at least one related "B" record.
"A" records may or may not have related "B" records.
(Click to relate another object)
A
B



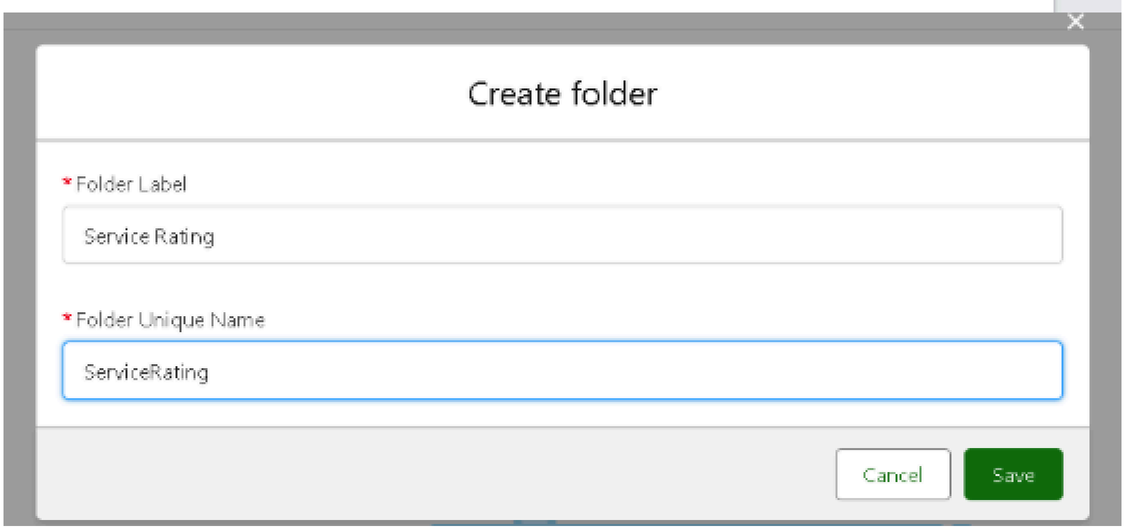


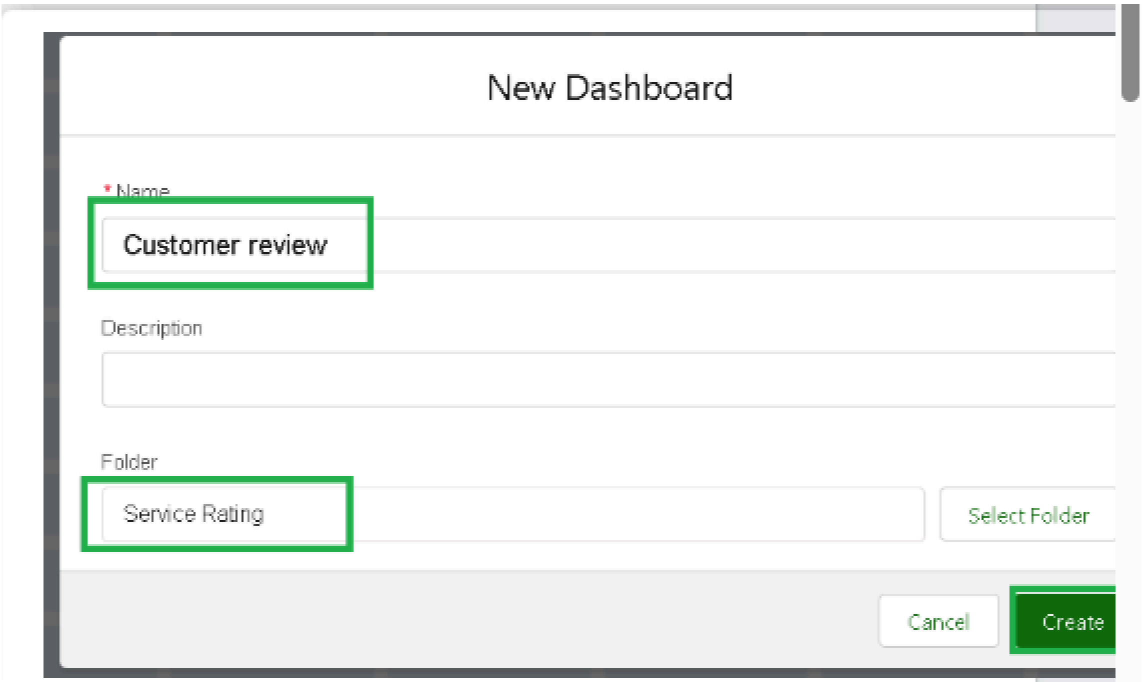
3. Select the Category as other reports, search for Service Information, select that report, click on it. And click on start report.



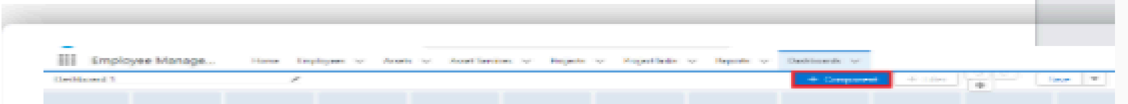

New Service information Report
Service information
Run

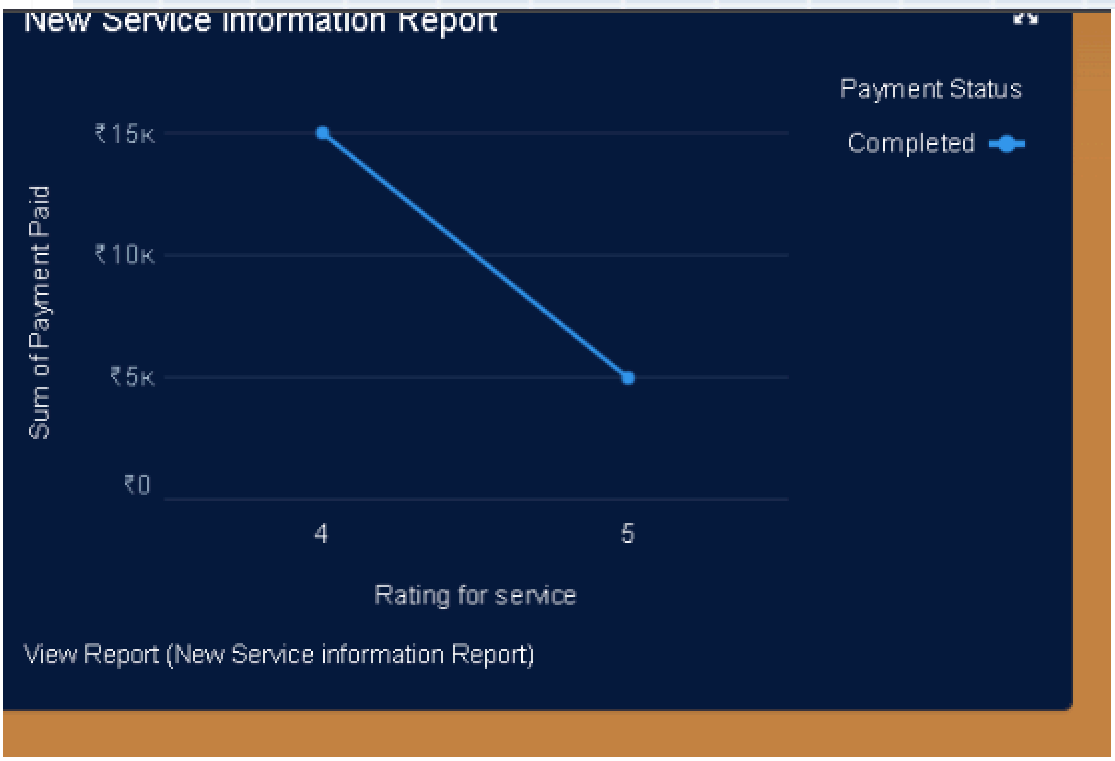

Save Report
*Report Name
New Service information Report
Report Unique Name
New_Service_information_Report_oVu
Report Description
Folder
Garage Management Folder
Select Folder
Cancel
Save

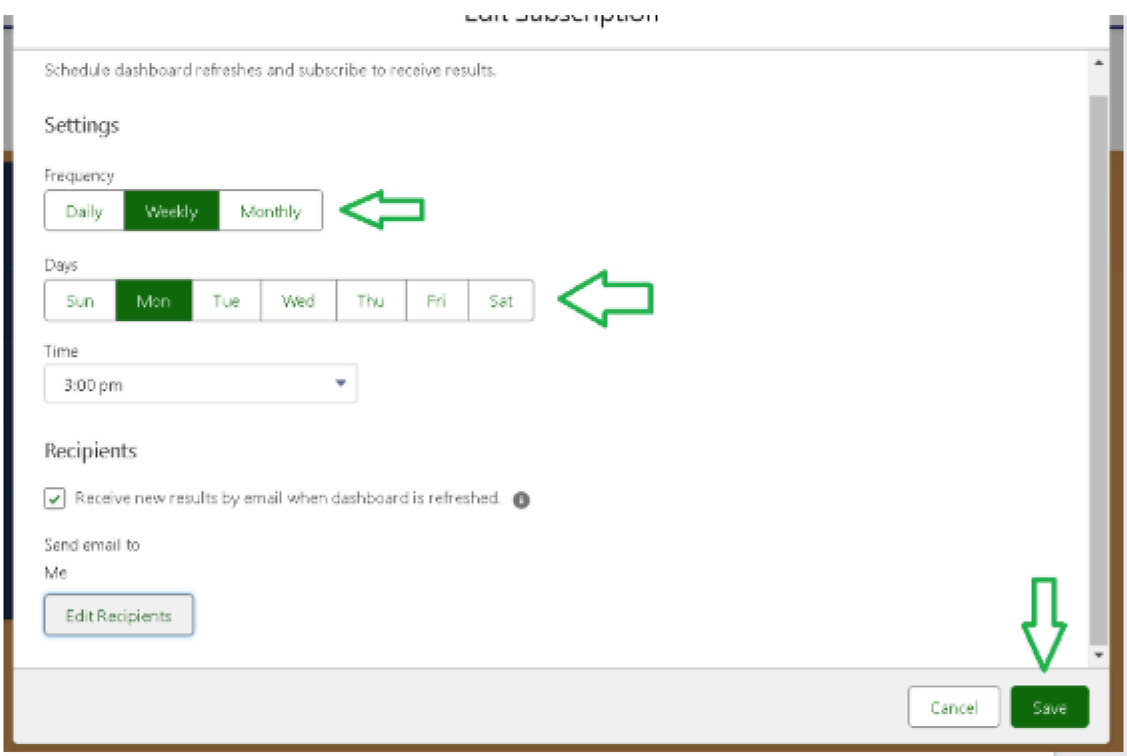

Create folder
* Folder Label
Service Rating
* Folder Unique Name
ServiceRating
Cancel
Save

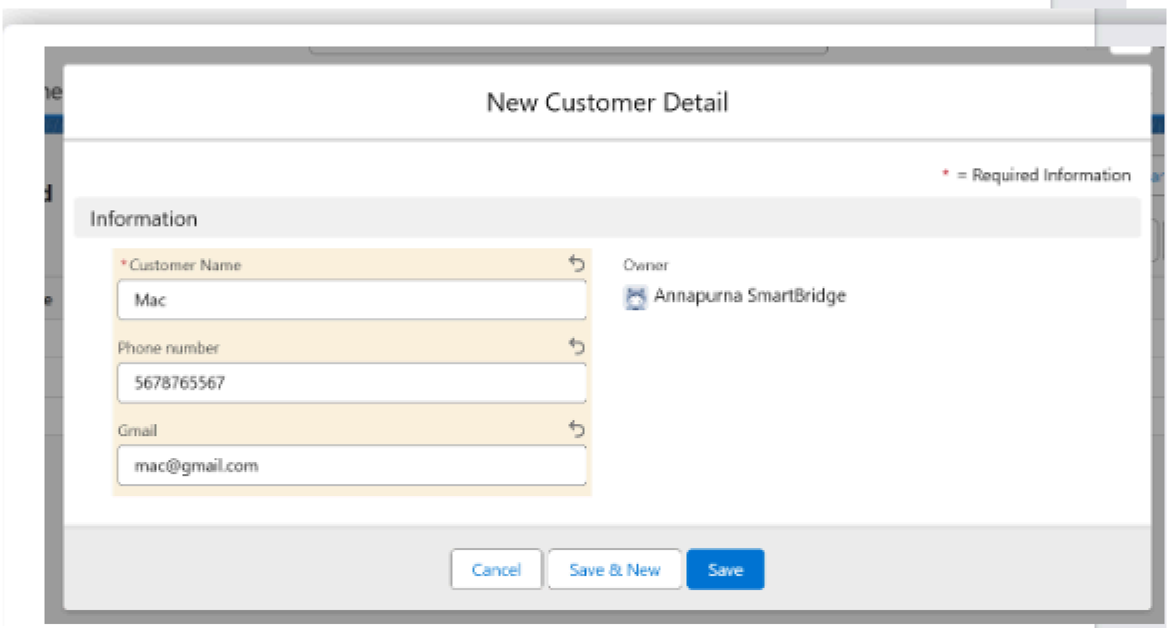


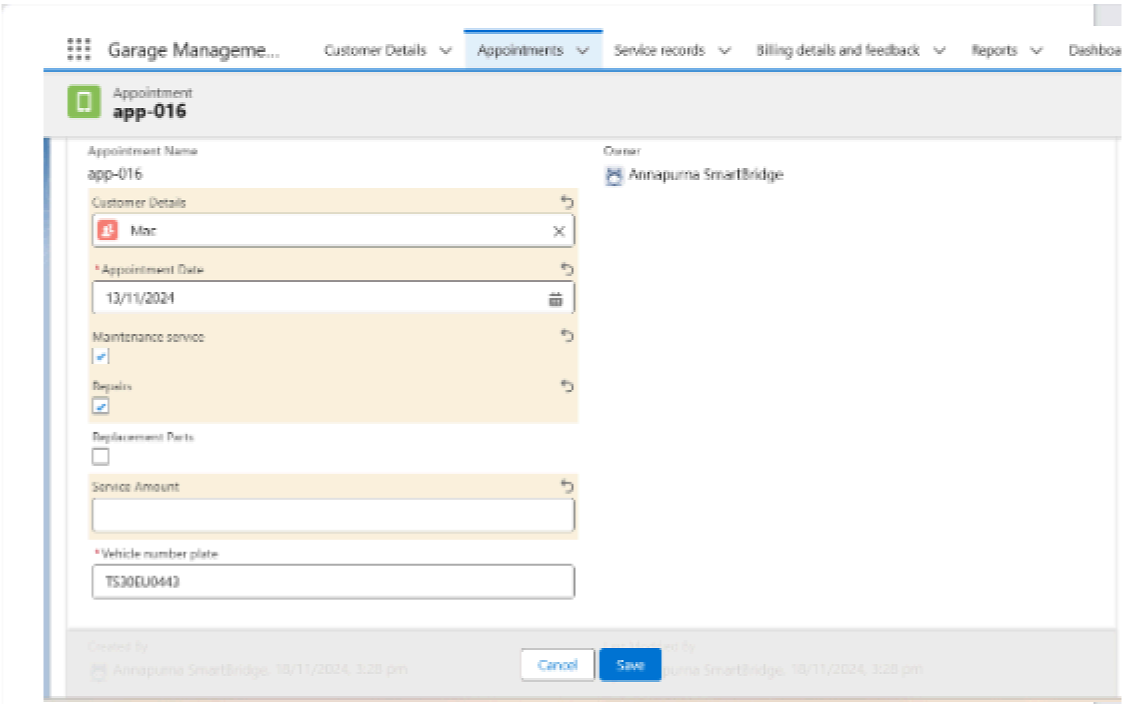
3. Select add component.

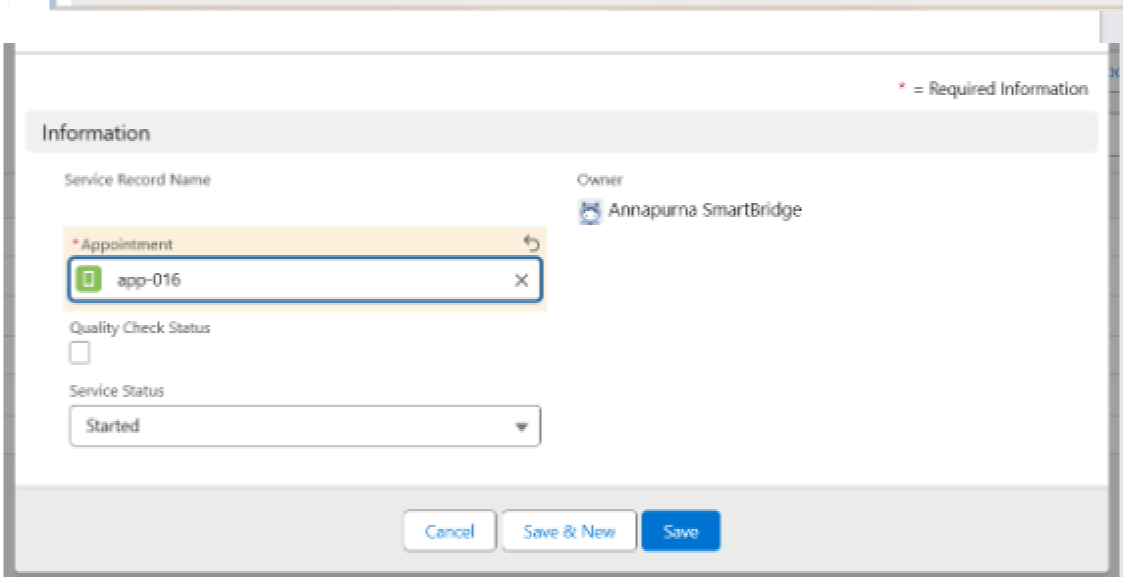


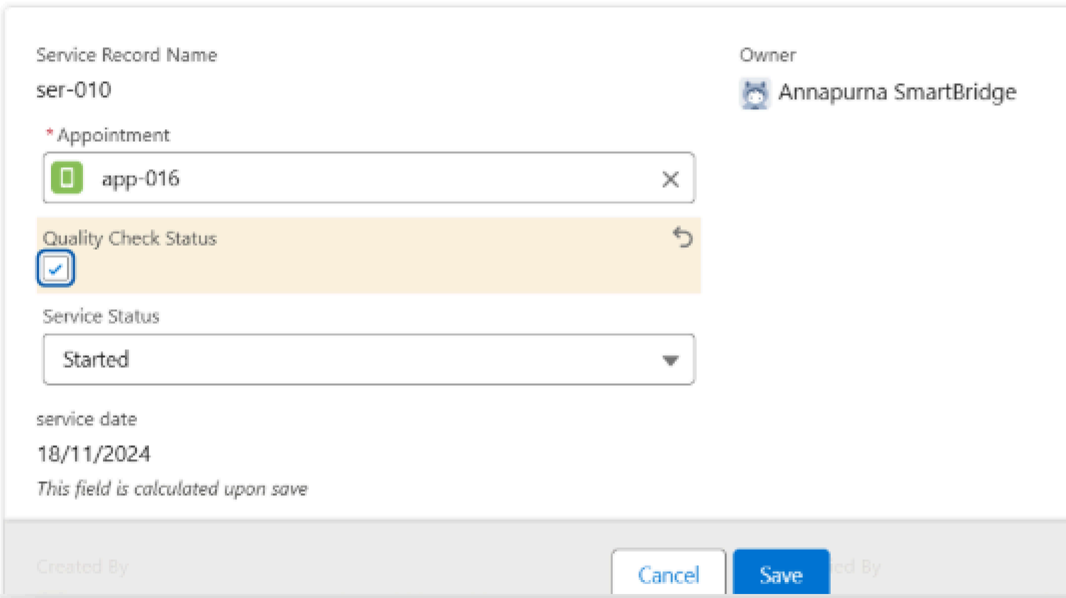


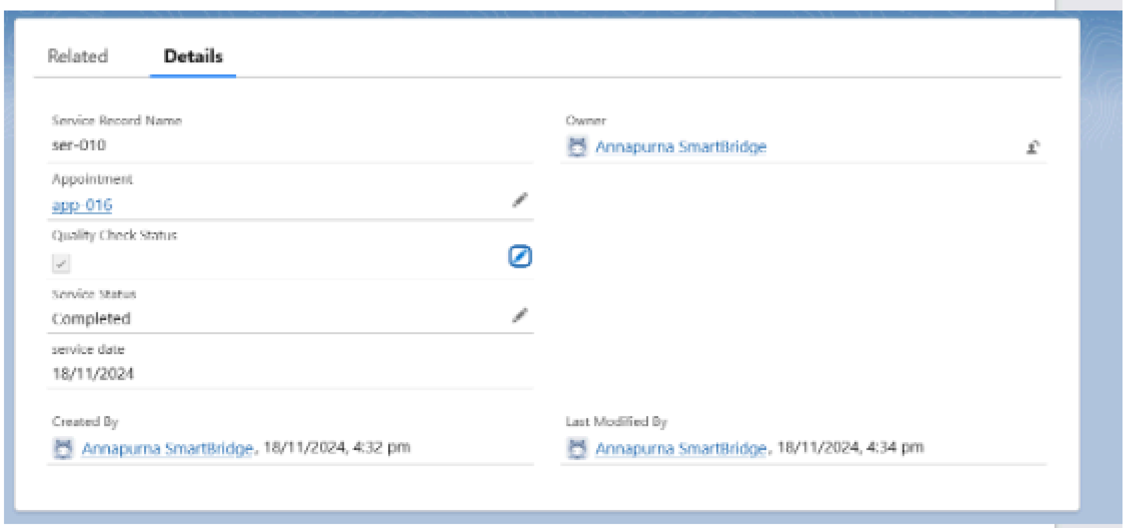

Schedule dashboard refreshes and subscribe to receive results.
Settings
Frequency
Daily
Weekly
Monthly
Days
Sun
Mon
Tue
Wed
Thu
Fri
Sat
Time
3:00 pm
Recipients
Receive new results by email when dashboard is refreshed.
Send email to
Me
Edit Recipients
Cancel
Save


New Customer Detail
* = Required Information
Information
*Customer Name
Mac
Phone number
5678765567
Gmail
mac@gmail.com
Owner
Annapurna SmartBridge
Cancel
Save & New
Save


Garage Manageme...
Customer Details
Appointments
Service records
Billing details and feedback
Reports
Dashboa
Appointment
app-016
Appointment Name
app-016
Owner
Annapurna SmartBridge
Customer Details
Mac
*Appointment Date
13/11/2024
Maintenance service
Repairs
Replacement Parts
Service Amount
*Vehicle number plate
TS30EU0443
Cancel
Save


* = Required Information
Information
Service Record Name
Owner
Annapurna SmartBridge
*Appointment
app-016
Quality Check Status
Service Status
Started
Cancel
Save & New
Save


Service Record Name
ser-010
Owner
Annapurna SmartBridge
* Appointment
app-016
Quality Check Status
Service Status
Started
service date
18/11/2024
This field is calculated upon save
Cancel
Save


Related
Details
Service Record Name
ser-010
Owner
Annapurna SmartBridge
Appointment
app-016
Quality Check Status
Service Status
Completed
service date
18/11/2024
Created By
Annapurna SmartBridge, 18/11/2024, 4:32 pm
Last Modified By
Annapurna SmartBridge, 18/11/2024, 4:34 pm