



Garagement management System

By

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Abstract:

The **Garage Management System** is a comprehensive solution designed to streamline the operations of automotive service centers using Salesforce. This project leverages Salesforce's powerful CRM capabilities to manage various aspects of garage operations, including customer interactions, appointment scheduling, service records, billing, and feedback collection. The system's primary objective is to enhance operational efficiency, improve customer satisfaction, and provide actionable insights for business growth. **Appointment Management** is a key feature that allows service centers to efficiently schedule vehicle service appointments, send automated reminders, and provide real-time updates on the service status. This helps in minimizing wait times and ensuring that the garage operates smoothly.

The system also includes a **Service Records** module, which acts as a centralized database to store detailed histories of every vehicle serviced. This includes information such as the work performed, parts replaced, and associated costs, making it easier for garages to keep track of all services provided and maintain high standards of service.

Another critical component is **Customer Relationship Management (CRM)**. This feature enhances customer interactions by tracking customer preferences, managing communication channels, and providing personalized service recommendations. By doing so, the system helps in building strong customer relationships and driving repeat business.

Billing and Payments are seamlessly integrated into the system, allowing garages to generate bills, track payment statuses, and manage various payment methods efficiently. This reduces administrative overhead and ensures that the financial aspects of the business are handled with accuracy and ease.

Finally, the system includes a **Feedback and Rating** module that captures customer feedback after each service. This feature enables continuous improvement by providing valuable insights into customer satisfaction and areas where service can be enhanced. Overall, the Garage Management System demonstrates the practical application of Salesforce in a real-world scenario, focusing on customization, automation, and effective data management within the platform. This project not only highlights the technical skills involved in configuring and customizing Salesforce but also showcases its potential to transform traditional business operations into more efficient and customer-centric processes.

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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.

The singular and plural labels are used in tabs, page layouts, and reports.

Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label	<input type="text" value="Customer Details"/>	Example: Account
Plural Label	<input type="text" value="Customer Details"/>	Example: Accounts
Starts with vowel sound	<input type="checkbox"/>	

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

Context-Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window
☐ Open a window using a Visualforce page

Content Name

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case it is "Case Number". Note that the Record called "Name" when referenced via the API.

Record Name Example: Account Name

Data Type **Warning:** If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

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.

When changing the name of an existing object, the name must be unique and cannot be the same as an existing object.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

Context-Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window
☐ Open a window using a Visualforce page

Content Name

Enter Record Name Label and Format

The Record Name appears in page layouts, key lists, related lists, lookups, and search results. For example, the Record Name for Account is "Account Name" and for Case is "Case Name".

Record Name Example: Account Name

Data Type **Warning:** If you plan to insert a high volume of records in this object, via the API for example, use the Text data type.

Display Format Example: A-{0000} [What Is This?](#)

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.

Custom Object Definition Edit

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

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.

Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label Example: Account
Plural Label Example: Accounts
Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

Context-Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window
☐ Open a window using a Visualforce page

Content Name

Optional Features

- ☒ Allow Reports
- ☐ Allow Activities
- ☒ Track Field History
- ☐ Allow in Chatter Groups
- ☐ Enable Licensing [i](#)

Object Classification

When these settings are enabled, this object is classified as an Enterprise Application object. When these settings are disabled, this object is classified as a Lig

- ☒ Allow Sharing
- ☒ Allow Bulk API Access
- ☒ Allow Streaming API Access

Deployment Status

- ☐ In Development
- ☒ Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

- ☒ Allow Search

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.
 2. Click save.

Edit Custom Object

Billing details and feedback

Custom Object Definition Edit
Save Save & New Cancel

Custom Object Information

The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.

Label Example: Account

Plural Label Example: Accounts

Starts with vowel sound ☐

The Object Name is used when referencing the object via the API.

Object Name Example: Account

Description

Context-Sensitive Help Setting ☒ Open the standard Salesforce.com Help & Training window
☐ Open a window using a Visualforce page

Content Name

Optional Features

☒ Allow Reports

☐ Allow Activities

☒ Track Field History

☐ Allow in Chatter Groups

☐ Enable Licensing [i](#)

Object Classification

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☒ Allow Sharing

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Deployment Status

☐ In Development

☒ Deployed

Search Status

When this setting is enabled, your users can find records of this object type when they search. [Learn more.](#)

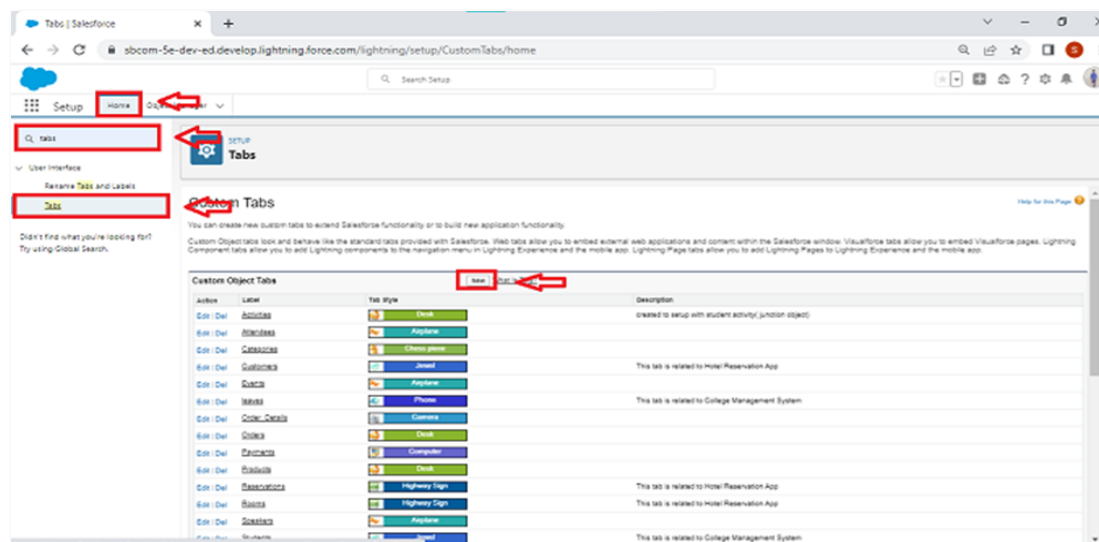
☒ Allow Search

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.

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

(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

Next

Cancel



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) keep it as default >> Next >> (Utility Items) keep it as default >> Next.
3. To Add Navigation Items:
4. 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:
6. Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.

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"
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.

Fields & Relationships

6 Items, Sorted by Field Label



FIELD LABEL	FIELD NAME	DATA TYPE
Created By	CreatedById	Lookup(User)
Customer Name	Name	Text(80)
Gmail	Gmail__c	Email
Last Modified By	LastModifiedById	Lookup(User)
Owner	OwnerId	Lookup(User,Group)
Phone number	Phone_number__c	Phone

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
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.
6. Scroll down for Lookup Filter and click on Show filter settings.
7. Now add the filter criteria.
8. Field : Appointment: Appointment Date >> Operator : less than >> select field >> Appointment: Created Date
9. Filter type should be Required.
 - Error Message : Value does not match the criteria.
 - Enable the filter by click on Active.
 - 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.
3. Select “Look-up relationship” as data type and click Next.
4. Select the related object “ Service records” and click next.

5. Next >> Next >> Save & new.

Creation of Checkbox Fields

Creation of Checkbox Field on Appointment Object :

1. Go to setup >> click on 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 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

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. 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

Please enter the maximum length for a text field below.

Length

Field Name

Description

Help Text

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

Unique ☒ Do not allow duplicate values

☒ Treat "ABC" and "abc" as duplicate values (case insensitive)

☐ Treat "ABC" and "abc" as different values (case sensitive)

External ID ☐ Set this field as the unique record identifier from an external system

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

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.

The screenshot shows the 'New Custom Field' dialog box, Step 2 of 4. The 'Field Label' is 'Service Status'. Under 'Values', the option 'Enter values, with each value separated by a new line' is selected. The text box below contains 'Started' and 'Completed'. The 'Field Name' is 'Service_Status'.

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 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.

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

☐ Checkbox

☐ Currency

☒ Date

☐ Date/Time

Select one of the data types below.

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

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

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

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

Previous Next Cancel

5. Insert field formula should be : CreatedDate

Insert Field

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

Service records >

\$Api >

\$Label >

\$Organization >

\$Profile >

\$System >

\$User >

\$UserRole >

Appointment

Appointment >

Created By >

Created By ID

Created Date

Last Activity Date

Last Modified By >

Last Modified By ID

Last Modified Date

You have selected:

CreatedDate

Type: Date/Time

API Name: CreatedDate

Insert

Close

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

Insert Field

Insert Operator

service dates (Date) = Createddate

Functions

-- All Function Categories --

ABS

ACOS

ADDMONTHS

AND

ASCII

Quick Tips

- Getting Started
- Operators & Functions

Previous Next Cancel

6. click “Check Syntax”.

7. Click next >> next >> Save.

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

Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Triggers
Flow Triggers
Validation Rules

Validation Rules

1 Items, Sorted by Rule Name

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

- 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

Save Save & New Cancel

Rule Name

Active ☒

Description

Error Condition Formula

Example: `Discount_Percent__c > 0.30` [More Examples...](#)
 Display an error if Discount is more than 30%

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

Functions

-- All Function Categories --

- ABS
- ACOS
- ADDMONTHS
- AND
- ASCII
- ASIN

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

[Help on this function](#)

- 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

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

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. Insert the Error Condition Formula as :-
`NOT(REGEX(Rating_for_service__c , "[1-5]{1}"))`

Validation Rule Edit [Save] [Save & New] [Cancel]

Rule Name: Service_status_note

Active: ☒

Description:

Error Condition Formula ⓘ = Required Information

Example: `Discount_Percent__c > 0.30` More Examples...
Display an error if Discount is more than 30%
If this formula expression is **true**, display the text defined in the Error Message area

Insert Field Insert Operator

`NOT(ISPICKVAL(Service_Status__c , "Completed"))`

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

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.

Error Message

Example: `Discount percent cannot exceed 30%`

This message will appear when Error Condition formula is **true**

Error Message: still it is pending

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 Service Status ⓘ

[Save] [Save & New] [Cancel]

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.

Matching Rule
New Matching Rule

Step 1 of 2

Select the object to which this matching rule applies.

Object: Customer Details

Next Cancel

4. Give the Rule name : Matching customer details

5. Unique name : is auto populated

6. Define the matching criteria as

7.	Field	Matching Method
1.	Gmail	Exact
2.	Phone Number	Exact

8. Click save.

9. After Saving Click on Activate.

Save Cancel

Rule Details

Object: Customer Details

Rule Name: matching Customer deta

Unique Name: matching_Customer_det

Description:

Matching Criteria


Tell the rule which fields to compare and how.

Field	Matching Method	Match Blank Fields	AND
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"/>	AND

Add Filter Logic...

Save Cancel

Matching Rule
matching Customer details Help for this Page

Matching Rule Detail Edit Delete Clone Activate 

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	project2, 25/09/2023, 10:15 am
Modified By	project2, 10/10/2023, 3:32 pm

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.

Q Dupli

▼ Data

▼ Duplicate Management

 Duplicate Error Logs

 Duplicate Rules

 Matching Rules

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

SETUP
Duplicate Rules

All Duplicate Rules Help for this Page

What Are Duplicate Rules? [Expand]

View: All Duplicate Rules

Rule Name	Description	Active	Last Modified By	Last Modified Date
Customer Detail duplicate			g2	10/10/2023
Standard Account Duplicate Rule	Identify accounts that duplicate other accounts.	✓	g2	24/09/2023
Standard Contact Duplicate Rule	Identify contacts that duplicate other contacts and leads.	✓	g2	24/09/2023
Standard Lead Duplicate Rule	Identify leads that duplicate other leads and contacts.	✓	g2	24/09/2023

New Rule

- Account
- Appointment
- Billing details and feedback
- Standard Account Matching Rule
- Standard Lead Matching Rule
- Standard Contact Matching Rule
- Customer Details
- Environment
- Individual
- Laptop
- Lead

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.

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 (Customer Details: Email EXACT MatchBlank = FALSE) AND (Customer Details: Phone_Number EXACT MatchBlank = FALSE)

Field Mapping ☒ Mapping Selected

Add Rule Remove Rule

Conditions

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

Field	Operator	Value	
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND
--None--	--None--		AND

Add Filter Logic...

Save Save & New Cancel

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.

Setup Home Object Manager

Q pro

Users

Profiles

Data

Mass Transfer Approval Requests

Feature Settings

Data.com

Prospector Preferences

Prospector Users

Functions

Marketing

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile Standard User

User License Salesforce

Profile Name Manager

Save Cancel

2. 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.

[Login IP Ranges](#) | [Enabled Apex Class Access](#) | [Enabled Visualforce Page Access](#) | [Enabled External Data Source Access](#) | [Enabled Named Credential Access](#) | [Enabled External Credential Principal Access](#) | [Enabled Custom Metadata Type Access](#) | [Enabled Custom Setting Definitions Access](#) | [Enabled Flow Access](#) | [Enabled Service Presence Status Access](#) | [Enabled Custom Permissions](#)

Profile Detail Edit Clone Delete View Users

Name	Manager		
User License	Salesforce	Custom Profile	<input checked="" type="checkbox"/>
Description			
Created By	sunry_1, 13/06/2023, 2:40 pm	Modified By	sunry_1, 13/06/2023, 2:40 pm

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

Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	(standard__ServiceConsole)	<input type="checkbox"/>	<input type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Garage Management Application (Garage_Management_Application)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>	Service Console (standard__LightningService)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Laptop Hub (Laptop_Hub)	<input type="checkbox"/>	<input type="radio"/>	Site.com (standard__Sites)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
			Subscription Management (standard__RevenueCloudConsole)	<input checked="" type="checkbox"/>	<input type="checkbox"/>

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

Custom Object Permissions

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

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

sales person Profile

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

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

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Laptops	<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 checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SessionData	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

5. And click save.

Creating Manager Role

Creating Manager Role:

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

The screenshot shows the Salesforce Setup interface. In the left sidebar, 'Setup' is selected, and 'Roles' is highlighted under 'Users'. The main content area is titled 'Understanding Roles' and contains a role hierarchy diagram. The diagram shows a hierarchy starting with 'Executive Staff' (CEO, President, CFO, VP, Sales) at the top, branching down to 'Western Sales Director', 'Eastern Sales Director', and 'International Sales Director'. Below these are various roles like 'On Site Rep', 'Remote Rep', 'On Site Emp', and 'Remote Emp'. A red box highlights the 'Set Up Roles' button at the bottom right of the diagram.

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

The screenshot shows the 'Your Organization's Role Hierarchy' page. At the top left, there are 'Collapse All' and 'Expand All' buttons. Below them is a list of roles: 'Nick Enterprises', 'CEO', 'HR', 'Manager', 'On Site Emp', 'Remote Emp', and 'Support'. Each role has an expand/collapse icon and an 'Add Role' button. A red box highlights the 'Expand All' button at the top left. Another red box highlights the 'Add Role' button under the 'Manager' role.

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

Role Edit

Label ←

Role Name

This role reports to 🔍

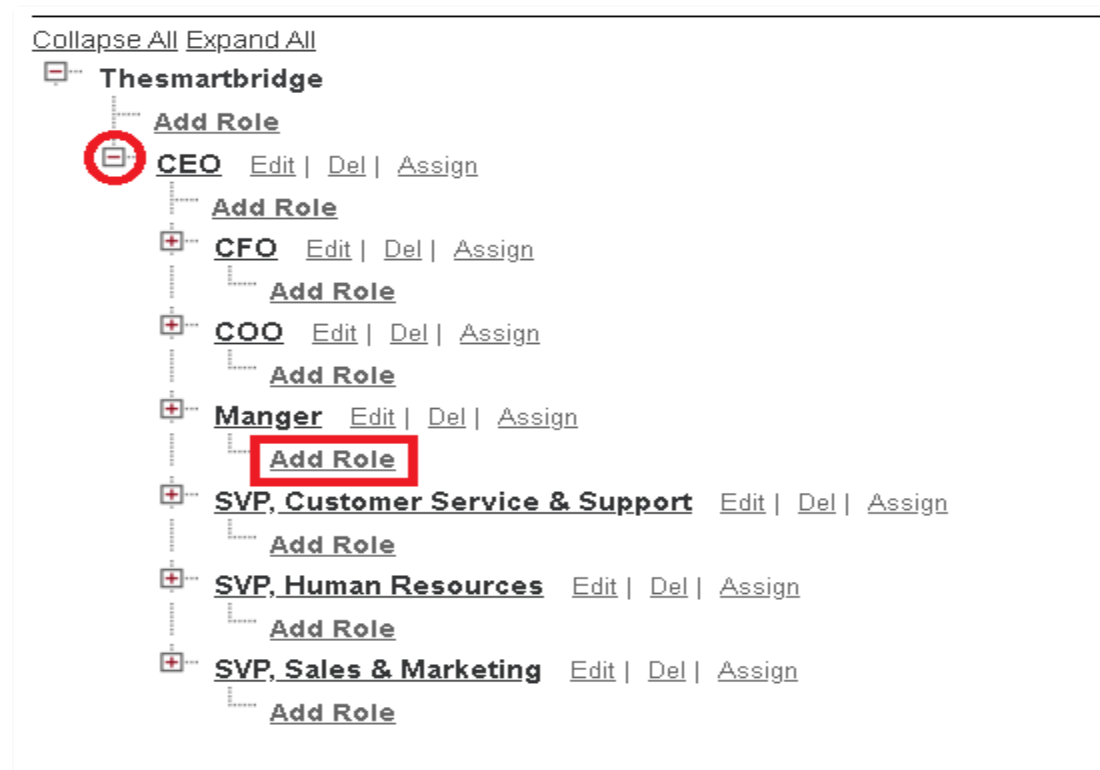
Role Name as displayed on reports

→ Save Save & New Cancel

Creating another roles

Creating another two roles under manager

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



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

Create User

1. Go to setup >> type users in quick find box >> select users >> click New user.
2. Fill in the fields
 1. First Name : Niklaus
 2. Last Name : Mikaelson
 3. Alias : Give a Alias Name

4. Email id : Give your Personal Email id
5. Username : Username should be in this form: text@text.text
6. Nick Name : Give a Nickname
7. Role : Manager
8. User licence : Salesforce
9. Profiles : Manager

3. Save.

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.

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.

6. Give the Label name as " Sharing setting"
7. Rule name is auto populated.
8. In step 3 : Select which records to be shared, members of " Roles " >> " Sales person"

9. In step 4: share with, select “ Roles ” >> “ Manager ”
10. In step 5 : Change the access level to “ Read / write ”.
11. Click on save.

Sharing Settings

You can use sharing rules only to grant wider access to data, not to restrict access.

Step 1: Rule Name ! = Required Information

Label: sharing settings ←

Rule Name: sharing_settings ←

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 ← Sales person ←

Step 4: Select the users to share with

Share with: Roles ← Manager ←

Step 5: Select the level of access for the users

Access Level: Read/Write ←

→ Save Cancel

Create a Flow

1. Go to setup >> type Flow in quick find box >> Click on the Flow and Select the New Flow.
2. Select the Record-triggered flow and Click on Create.

New Flow

Core All + Templates

<p>Screen Flow</p> <p>Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, and more.</p>	<p>Record-Triggered Flow</p> <p>Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.</p> <p style="color: red; font-weight: bold; font-size: 24px;">1</p>
<p>Schedule-Triggered Flow</p> <p>Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the background.</p>	<p>Platform Event—Triggered Flow</p> <p>Launches when a platform event message is received. This autolaunched flow runs in the background.</p>
<p>Autolaunched Flow (No Trigger)</p> <p>Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the background.</p>	<p>Record-Triggered Orchestration</p> <p>Launches when a record is created or updated. An orchestration lets you create a multi-step, multi-user process.</p>

2 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.

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:

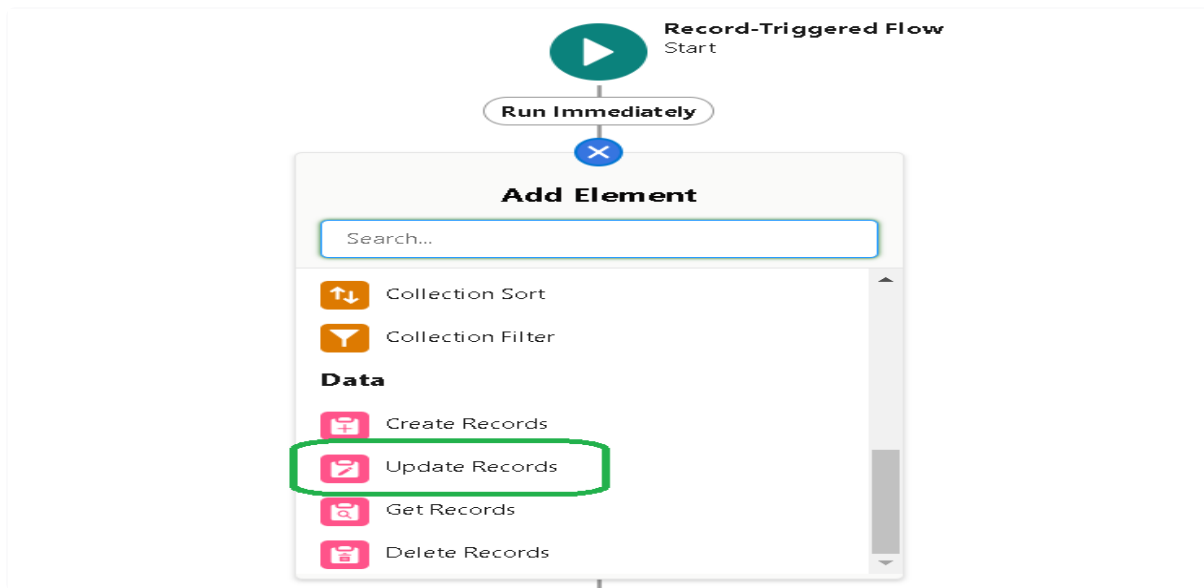
Fast Field Updates
Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

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

Cancel 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

The screenshot shows the 'Edit Update Records' dialog. It has a title bar 'Edit Update Records'. Below the title bar, there is a description: 'Update Salesforce records using values from the flow.' There are two input fields: '*Label' with the value 'Amount Update' and '*API Name' with the value 'Amount_Update'. Below these is a 'Description' field. There is a section titled '*How to Find Records to Update and Set Their Values' with four radio button options: 'Use the billing details and feedback record that triggered the flow' (selected), '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', and 'Specify conditions to identify records, and set fields individually'. Below this is a section titled 'Set Filter Conditions' with a dropdown menu labeled 'Condition Requirements to Update Record' showing 'All Conditions Are Met (AND)'. At the bottom right, there are 'Cancel' and 'Done' buttons.

Set Filter Conditions

Condition Requirements to Update Record
All Conditions Are Met (AND)

Field	Operator	Value
Payment_Status__c	Equals	Completed

+ Add Condition

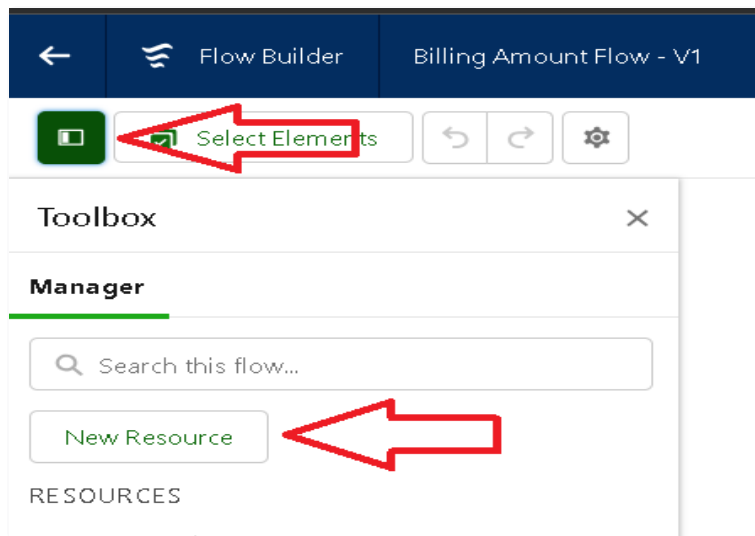
Set Field Values for the Billing details and feedback Record

Field	Value
Payment_Paid__c	\$Record > Service records > Appointment > Service A...

+ Add Field

Cancel Done

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 services to you and all our valued customers.

Amount paid : {!\$Record.Payment_Paid__c}

Thank you for Coming .

23. Click done.

The screenshot shows the 'Edit Text Template' dialog box. The 'API Name' field is highlighted with a red box and contains the text 'alert'. The 'Description' field is empty. The 'Body' field is highlighted with a red box and contains the text 'Dear {!\$Record.Service_records__r.Appointment__r.Customer_Name__r.Name},'. The 'View as Plain Text' dropdown is highlighted with a red box and is set to 'View as Plain Text'. The 'Done' button is highlighted with a red arrow.

24. Now Click on Add Element , select Action.

25. Their action bar will be opened in that search for “ send email ” and click on it.

26. Give the label name as “ Email Alert”

27. API name will be auto populated.

28. Enable the body in set input values for the selected action.

29. Select the text template that created , Body : {!alert}
30. Include recipient address list select the email form the record.
31. RecipientAddressList:
{!\$Record.Service_records__r.Appointment__r.Customer_Name__r.Gmail__c}
32. Include subject as " Thank You for Your Payment - Garage Management".
33. Click done

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	*API Name
Email Alert	Email_Alert

Description

Set Input Values for the Selected Action

A _a Body ⓘ	<div>{!alert}</div>	<div><input checked="" type="checkbox"/> Include</div>
A _a Email Template ID		<div><input type="checkbox"/> Don't Include</div>
🔒 Log Email on Send		<div><input type="checkbox"/> Don't Include</div>

Edit Action

Recipient Address List	<code>{!\$Record.Service_records__r.Appointment__r.Cus</code>	<input checked="" type="checkbox"/> Include
Recipient ID		<input type="checkbox"/> Don't Include
Related Record ID		<input type="checkbox"/> Don't Include
Rich-Text-Formatted Body		<input type="checkbox"/> Don't Include
Sender Email Address		<input type="checkbox"/> Don't Include
Sender Type		<input type="checkbox"/> Don't Include
Subject	Thank You for Your Payment - Garage Manageme	<input checked="" type="checkbox"/> Include

Cancel
Done

34. Click on save. Give the Flow label , Flow Api name will be autopopulated.

35. And click save, and click on activate.

Record-Triggered Flow

Save as

A New Version
A New Flow

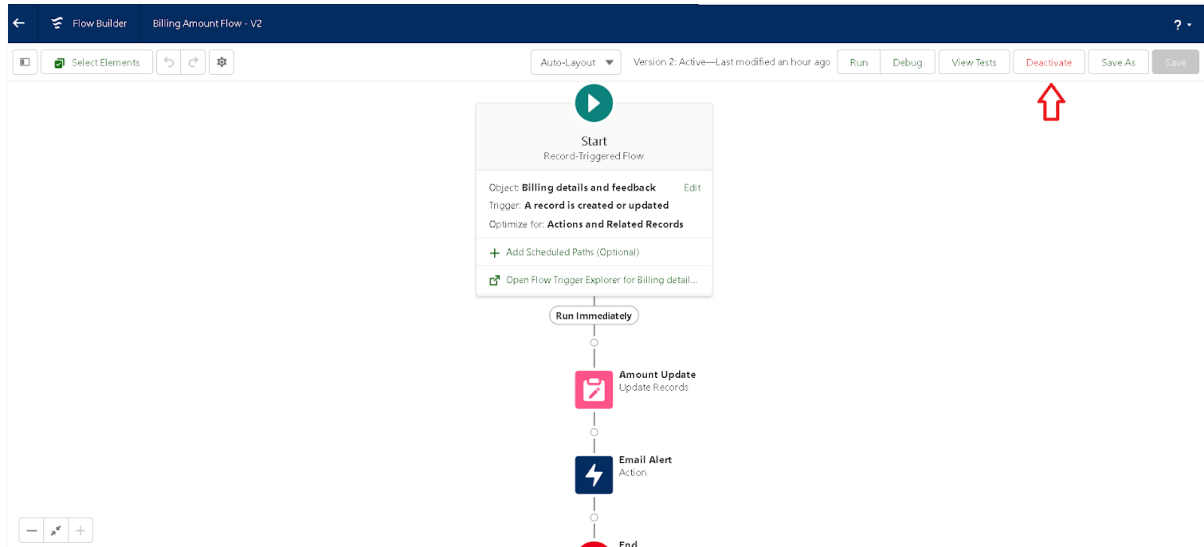
*Flow Label

*Flow API Name

Description

Show Advanced

Cancel
Save



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 ".

```

AmountDistribution.apex | AmountDistributionHandler.apex
Code Coverage: None | API Version: 58 | Go To
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;

```

```
12      }
13      else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
14          app.Service_Amount__c = 8000;
15      }
16      else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
17          app.Service_Amount__c = 7000;
18      }
19      else if(app.Maintenance_service__c == true){
20          app.Service_Amount__c = 2000;
21      }
22      else if(app.Repairs__c == true){
23          app.Service_Amount__c = 3000;
24      }
25      else if(app.Replacement_Parts__c == true){
26          app.Service_Amount__c = 5000;
27      }
28  }
29  }
30  }
31 }
```

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;
}

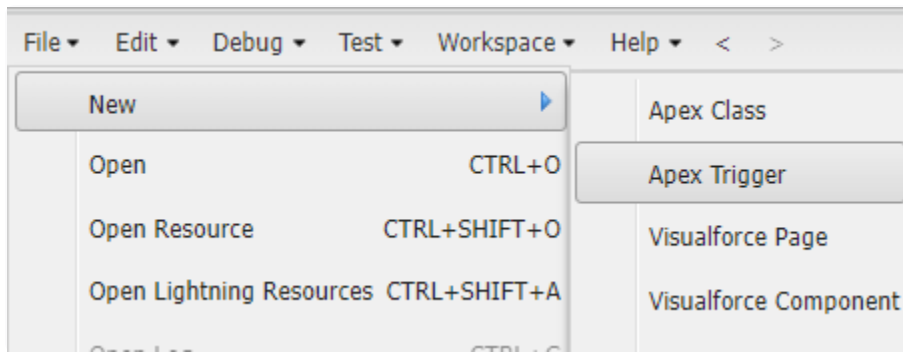
}
}
}

```

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

A screenshot of the 'New Apex Trigger' dialog box. It has a title bar with a close button. Inside, there are two fields: 'Name:' with a text input box, and 'sObject:' with a dropdown menu. At the bottom right is a 'Submit' button.

Syntax For creating trigger :

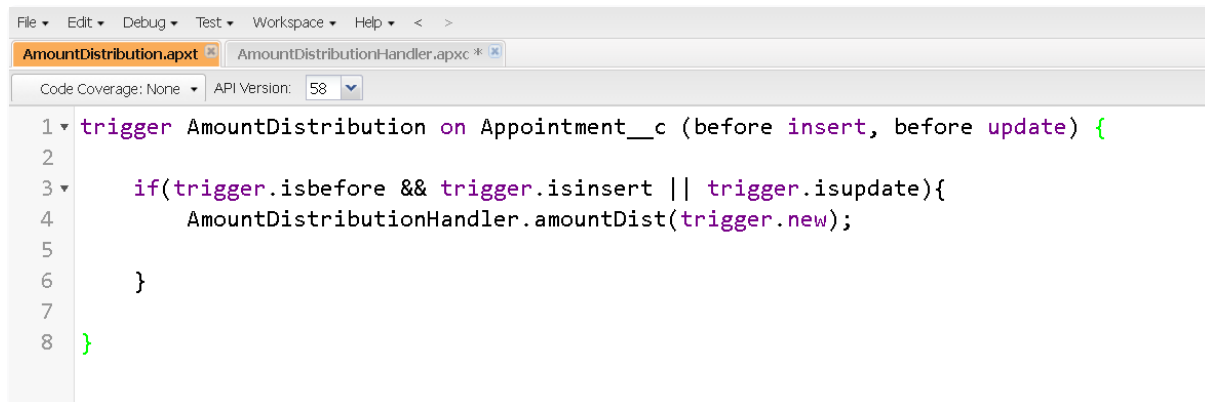
The syntax for creating trigger is:

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);
    }

}
```

create a report folder

1. Click on the app launcher and search for reports.
2. Click on the report tab, click on new folder.
3. Give the Folder label as “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... **2**

Manger X

Access

View **3**

Share **4**

Who Can Access

Q

sunny 1
Users

Manage X

5 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.

Setup Home Object Manager

Search: report type

Feature Settings

Analytics

Reports & Dashboards

Report Types

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

Report Types

All Custom Report Types

With custom report types, you can enable users to create reports from the predefined objects, object relationships, and fields that you specify.

View: All Custom Report Types Edit | Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Label	Description	Category	Deployed	Created By Alias	Created Date
Edit Del	Bot Metrics Daily Summer '23	Einstein Bot metrics aggregated by day.	Other Reports	✓	autoproc	28/09/2023
Edit Del	Bot Metrics Hourly Summer '23	Einstein Bot metrics aggregated by hour.	Other Reports	✓	autoproc	28/09/2023
Edit Del	Screen Flows	Find out which flows get executed and how long users take to complete each flow screen.	Other Reports	✓	autoproc	24/09/2023
Edit Del	Session Metrics Summer '23	Einstein Bot session metrics	Other Reports	✓	autoproc	28/09/2023

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

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.

SETUP

Report Types

Report Type Focus

Specify what type of records (rows) will be the focus of reports generated by this report type.

Example: If reporting on "Contacts with Opportunities with Partners," select "Contacts" as the primary object.

Primary Object: Customer Details

Identification

Report Type Label: Service information

Report Type Name: Service_information

Description: Note: Description will be visible to users who create reports.

Store in Category: Other Reports

Deployment

A report type with deployed status is available for use in the report wizard. While in development, report types are visible only to authorized administrators and their delegates.

Deployment Status: ☐ In Development ☒ Deployed

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

Step 2. Define Report Records Set

Step 2 of 2

Previous Save Cancel

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

A Customer Details

Primary Object

B --Select Object--

Activities

Appointments

Duplicate Record Items

at least one related "B" record.
related "B" records.

A

B

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

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

11. Again Click to relate another object.
12. And select the related object as "service records".
13. Repeat the process and select the related object as "Billing details and feedback".
14. And click on save.



SETUP

Report Types

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

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.

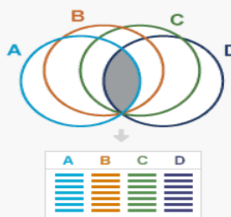
D Billing details and feedback

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.



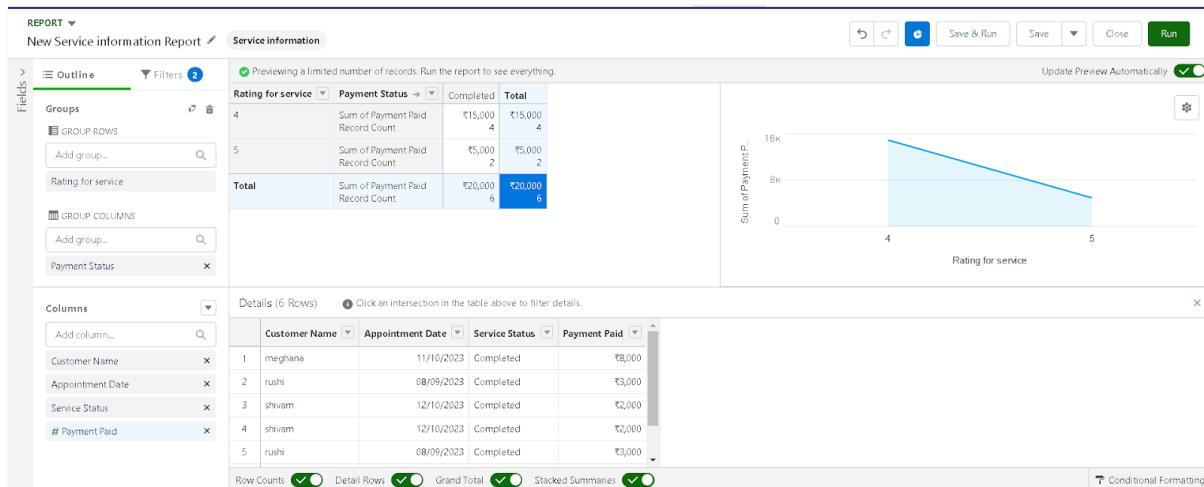
Create Report

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

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

4. Their outline pane is opened already, 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.

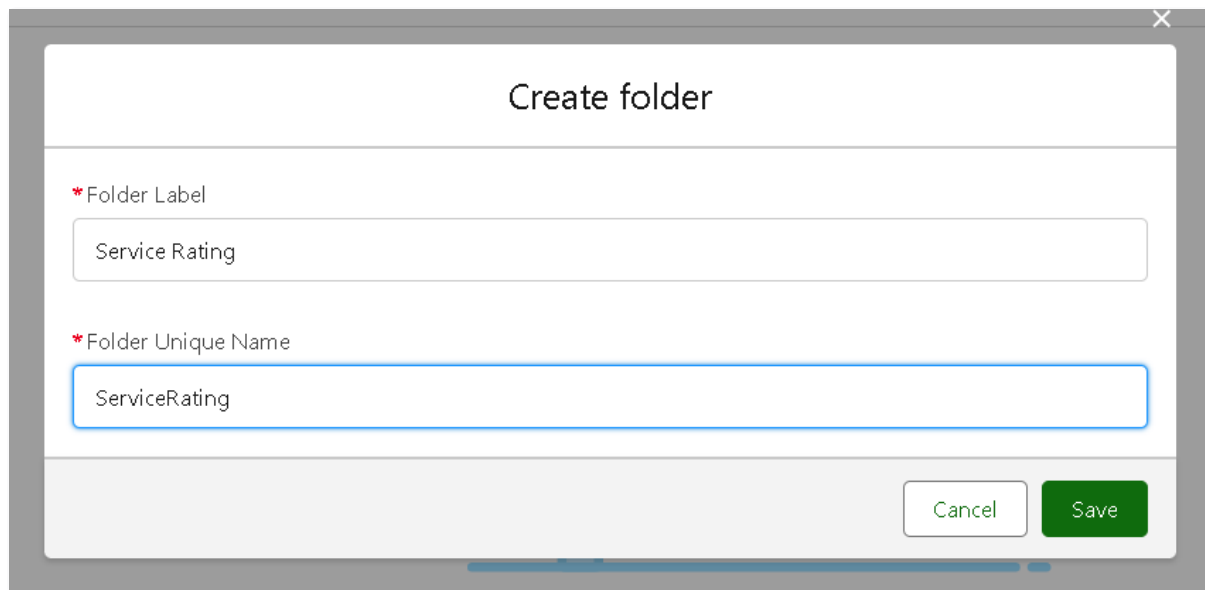
1. Payment Status
8. Click on Add Chart , Select the Line Chart.
9. Click on save, Give the report Name : New Service information Report
10. Report unique Name is auto populated.
11. Select the folder the created and Click on save.



The screenshot shows the 'Save Report' dialog box. It has four main input fields: 'Report Name' (containing 'New Service information Report'), 'Report Unique Name' (containing 'New_Service_information_Report_oVu'), 'Report Description' (empty), and 'Folder' (containing 'Garage Management Folder'). There are green arrows pointing to the 'Report Name' and 'Folder' fields. At the bottom right, there are 'Cancel' and 'Save' buttons.

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.

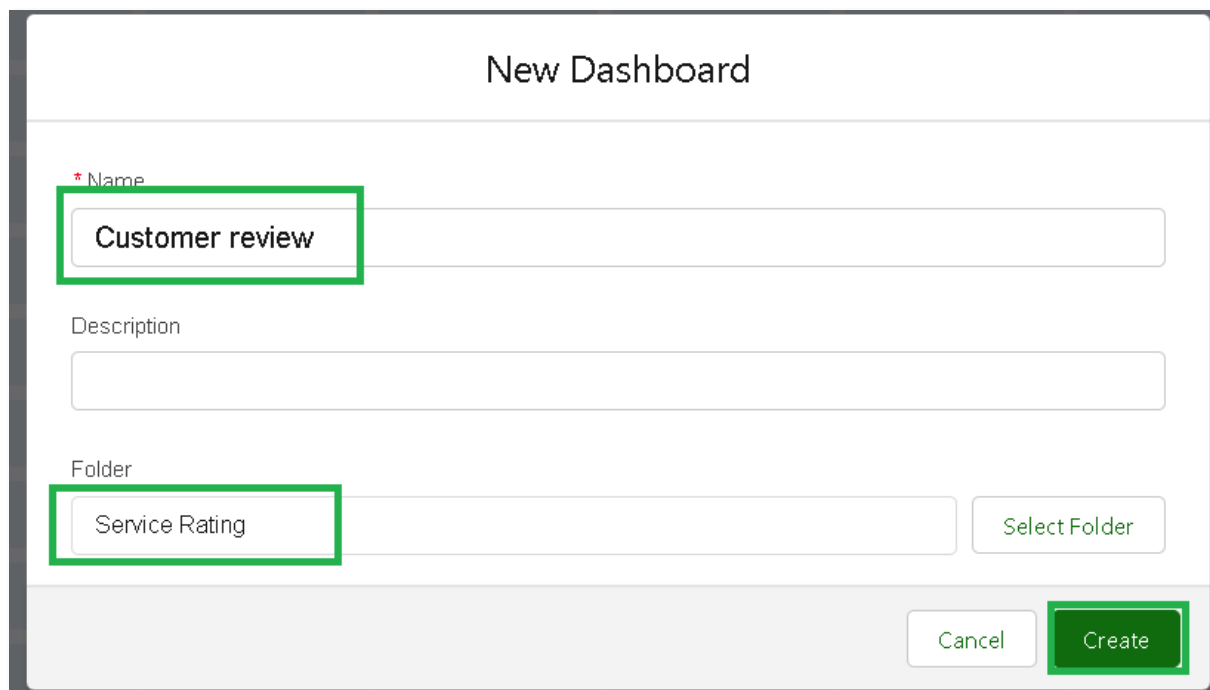


A dialog box titled "Create folder" with a close button (X) in the top right corner. It contains two required fields: "Folder Label" with the value "Service Rating" and "Folder Unique Name" with the value "ServiceRating". The "Folder Unique Name" field is highlighted with a blue border. At the bottom right, there are "Cancel" and "Save" buttons.

6. Follow the same steps, from milestone 15, and activity 2, and provide the sharing 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 create.



A dialog box titled "New Dashboard" with a close button (X) in the top right corner. It contains three fields: "Name" with the value "Customer review" (highlighted with a green border), "Description" (empty), and "Folder" with the value "Service Rating" (highlighted with a green border). To the right of the "Folder" field is a "Select Folder" button. At the bottom right, there are "Cancel" and "Create" buttons (the "Create" button is highlighted with a green border).

3. Select add component

Import favorites | Gmail | YouTube | Maps | McAfee Security | LastPass password... | Flow Builder Logic | MRU Universe - Go... | Skill Wallet | developer account | Other favorites

Garage Manage... Customer Details ▾ Appointments ▾ Service records ▾ Billing details and feedback ▾ Reports ▾ Dashboards ▾ X

Dashboards

Recent
2 items

Search recent dashboards... New Dashboard New Folder ⚙ ▾

DASHBOARDS	Dashboard Name ▾	Description ▾	Folder ▾	Created By ▾	Created On ▾	Subscribed
Recent	Customer review		Private Dashboards	Azeed Shaik	23/8/2024, 6:35 pm	▾
Created by Me	Service Rating dashboard		Private Dashboards	Azeed Shaik	23/8/2024, 6:17 pm	▾
Private Dashboards						
All Dashboards						

4. 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

Select Report

Search Reports and Folders...

Reports and Folders ▾

New Opportunities Report
Azeed Shaik - 23-Aug-2024, 6:29 pm - Garage Management Folder

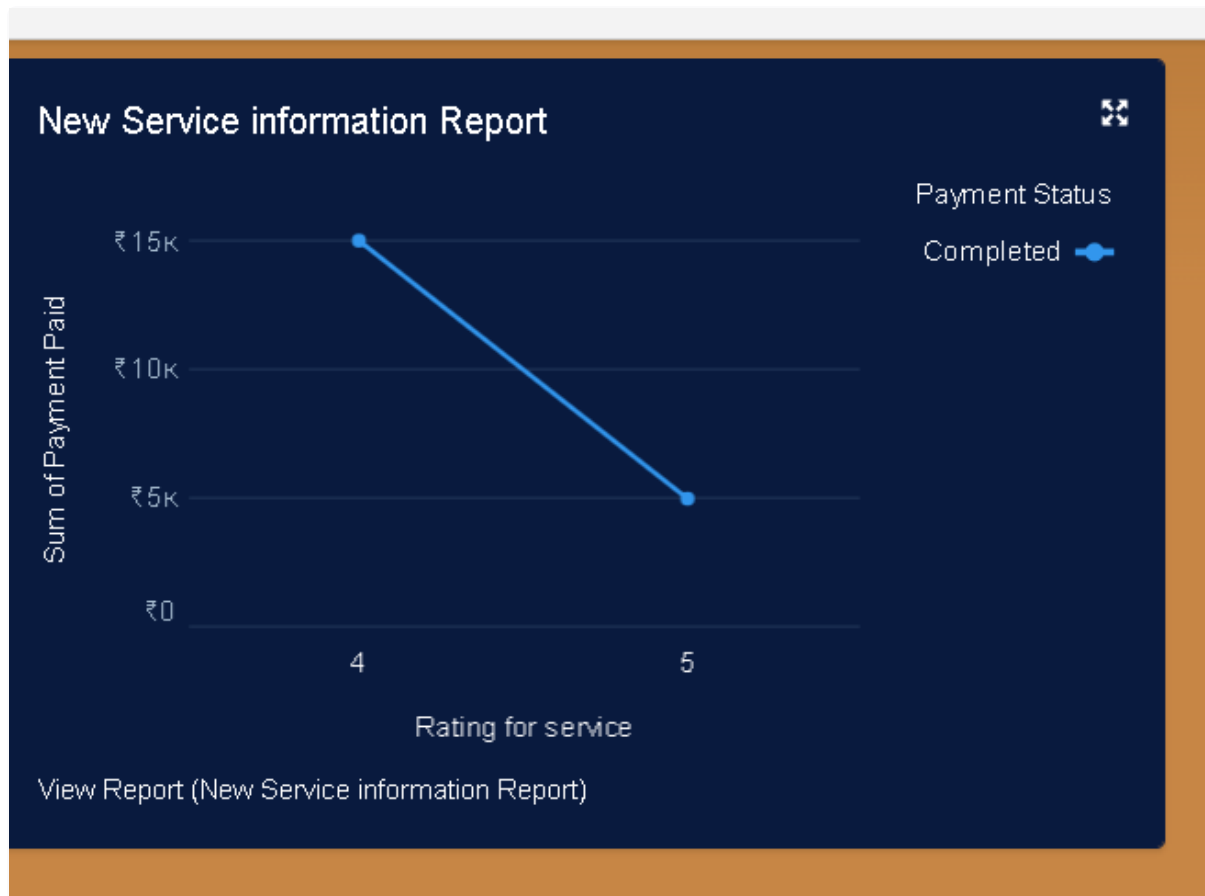
New Service information Report
Azeed Shaik - 23-Aug-2024, 6:20 pm - Garage Management Folder

Cancel Select

5. Select the Line Chart. Change the theme.

6. Click Add then click on Save and then click on Done.

5. Preview is shown below.



8. After that Click on Subscribe on top right.
9. Set the Frequency as " weekly ".
10. Set a day as monday.
8. 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:

Recipients

☒ Receive new results by email when dashboard is refreshed.

Send email to Me: