

Salesforce Virtual Internship Program

SmartInternz

Garage management system

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PROJECT ABSTRACT

The Salesforce-based Garage Management System (GMS) is a sophisticated solution tailored for automotive repair facilities to elevate service quality, streamline operations, and cultivate enduring customer relationships. Leveraging Salesforce's powerful CRM capabilities, GMS offers an intuitive interface and comprehensive features, allowing garages to thrive in a competitive marketplace. The system automates critical processes such as appointment scheduling, inventory management, billing, and customer communications. By integrating these functionalities within Salesforce, GMS ensures a seamless and satisfying experience for both customers and staff. This advanced solution empowers automotive repair businesses to deliver top-notch service, optimize workflows, and maintain a competitive edge.

INTRODUCTION

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

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

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

Project title: Garage management system

1. Project Overview

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

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

TASK 1:

1.1 Creating Developer Account

(Creating a developer org in salesforce):

1. Go to <https://developer.salesforce.com/signup>
2. On the sign up form, enter the following details :
 - First name & Last name
 - Email
 - Role : Developer
 - Company : College Name
 - County : India
 - Postal Code : pin code
 - Username : should be a combination of your name and company. This need not be an actual email id, you can give anything in the format : username@organization.comClick on sign me up after filling these.

1.2 Account Activation

1. Go to the inbox of the email that you used while signing up. Click on the verify account to activate your account. The email may take 5-10mins.
2. Click on Verify Account
3. Give a password and answer a security question and click on change password.
4. Then you will redirect to your salesforce setup page.

TASK 2:

To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
 1. Enter the label name >> Customer Details
 2. Plural label name >> Customer Details
 3. Enter Record Name Label and Format

- Record Name >> Customer Name
 - Data Type >> Text
2. Click on Allow reports and Track Field History,
 3. Allow search >> Save.

TASK 3:

Create Appointment Object

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

TASK4:

Create Service records Object

To create an object:

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

TASK 5:

Create Billing details and feedback Object

To create an object:

1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.
 1. Enter the label name >> Billing details and feedback
 2. Plural label name >> Billing details and feedback
 3. Enter Record Name Label and Format
 - Record Name >> Billing details and feedback Name
 - Data Type >> Auto Number
 - Display Format >> bill-{000}
 - Starting number >> 1

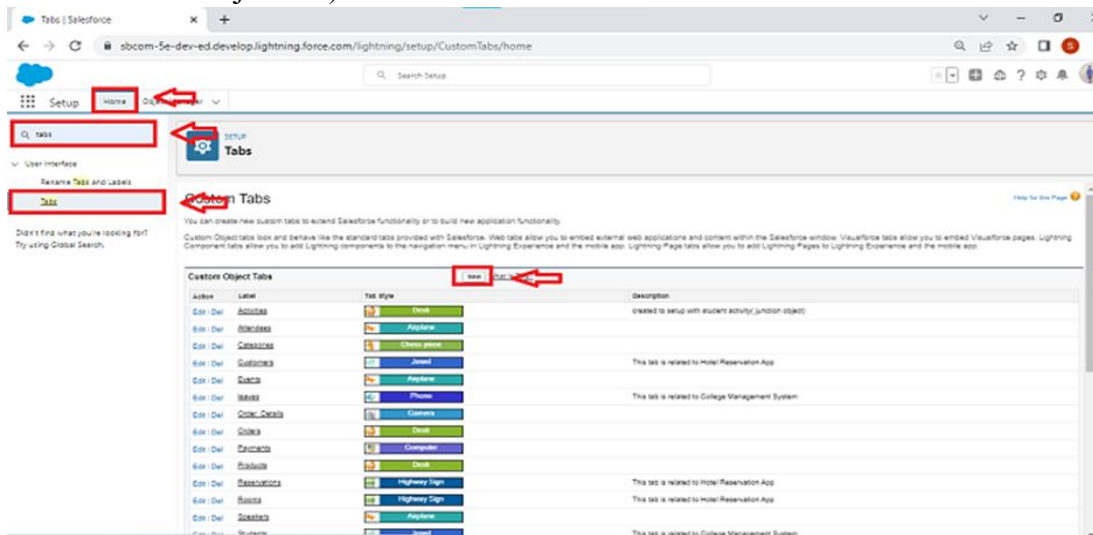
2. Click on Allow reports and Track Field History,
3. Allow search >> Save.

TASK 6:

Creating a Custom Tab

To create a Tab:(Customer Details)

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



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:

Tab Style:

(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.

Splash Page Custom Link:

Enter a short description.

Description:

Next Cancel

Tab Style Selector

Create your own style

Hide styles which are used on other tabs

Airplane

Alarm clock

Apple

Balls

Bank[1]

Bell

Big top

Boat[1]

Books

Bottle

Box

Bridge

Building

Building Block

Caduceus

Camera

Can

Car

Castle

CD/DVD

Cell phone

Chalkboard

Chess piece

Chip

Circle

Compass

Computer

Credit card

CRT TV

Cup

Desk[1]

Diamond

Dice

Factory

Fan

Flag

Form

Gears

Globe

Guitar

Hammer

Hands

Handsaw

Headset

Heart[1]

Helicopter

Hexagon

Highway Sign

Hot Air Balloon

Insect

IP Phone

Jewel

Keys

Laptop

Leaf

Lightning

Save

Cancel

Step 3. Add to Custom Apps

Step 3 of 3

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

Custom App

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

TASK 7:

Creating Remaining Tabs

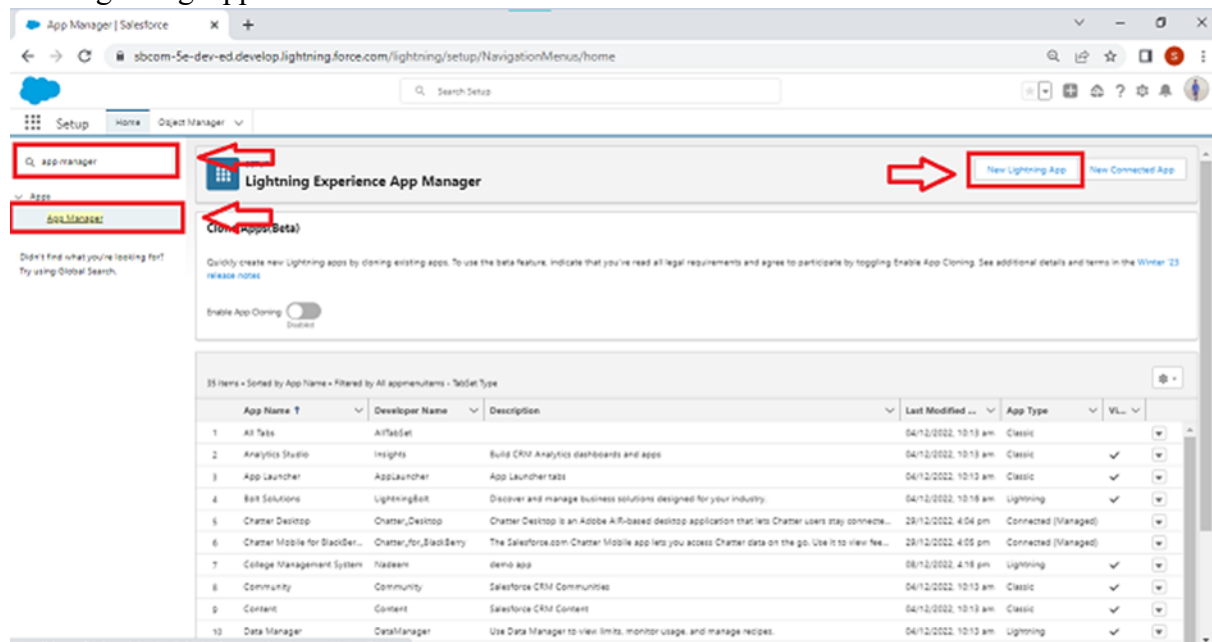
1. Now create the Tabs for the remaining Objects, they are “ Appointments, Service records,Billing details and feedback”.
2. Follow the same steps as mentioned in Activity -1

TASK8:

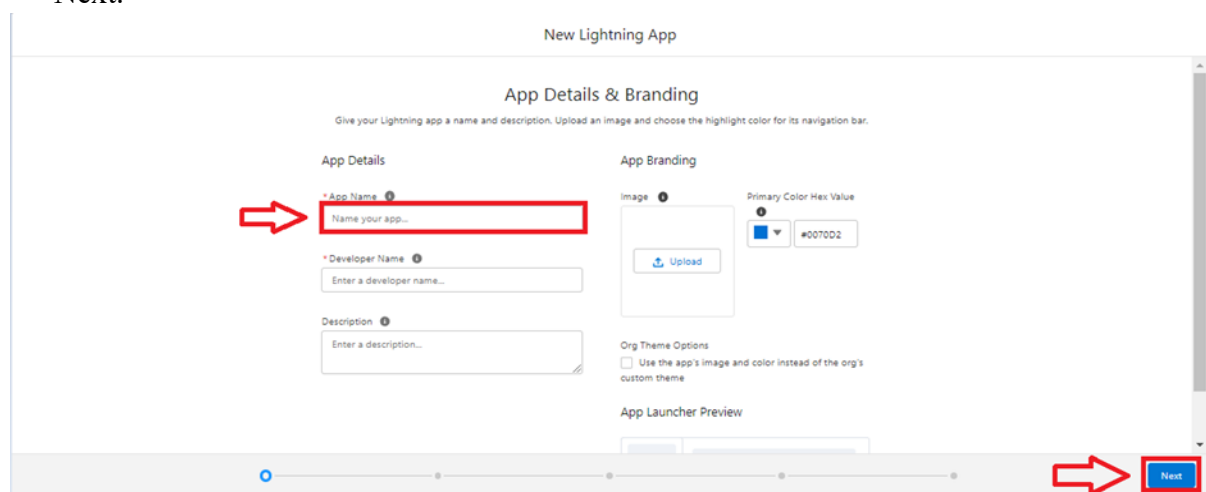
Create a Lightning App

To create a lightning app page:

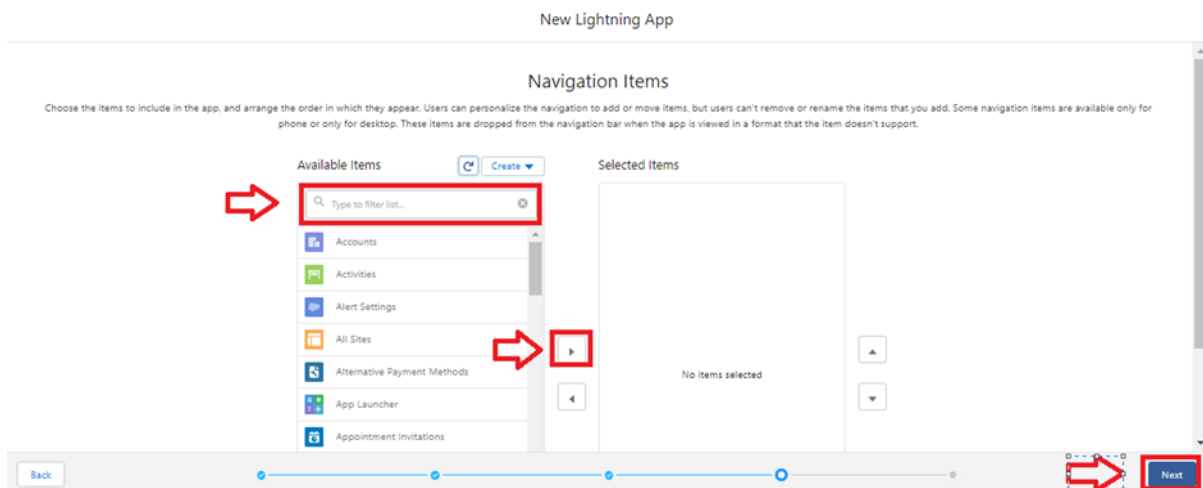
1. Go to setup page >> search “app manager” in quick find >> select “app manager” >> click on New lightning App.



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.

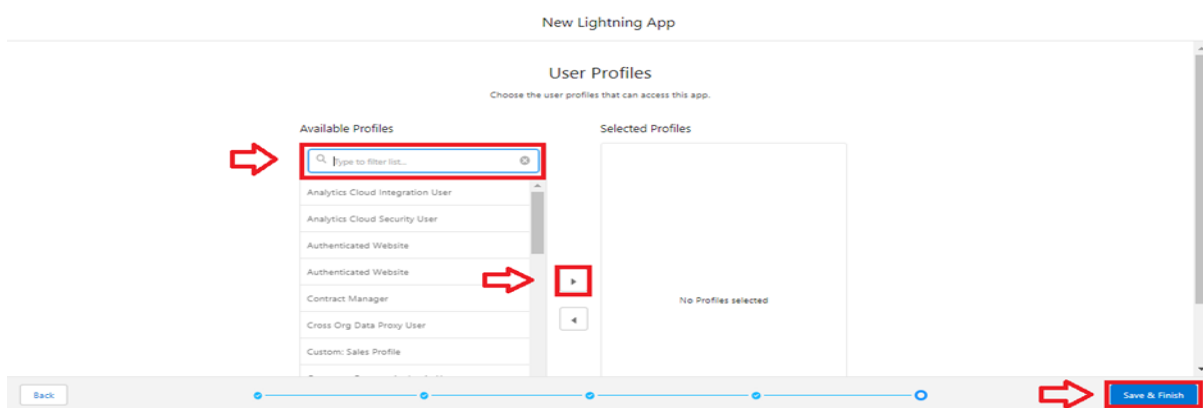


3. To Add Navigation Items:



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:



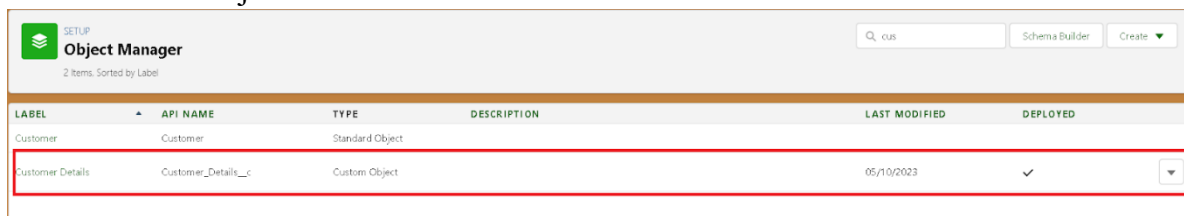
Search profiles (System administrator) in the search bar >> click on the arrow button >> save & finish.

TASK 9:

Creation of fields for the Customer Details object

91. 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

Setup - Object Manager - Customer1

Fields & Relationships (8 Items, Sorted by Field Label)

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
current Status	current_Status__c	Picklist		
Customer Name	Name	Text(80)		✓
Email Id	Email_Id__c	Email (Unique)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Permanent Address	Permanent_Address__c	Text Area(255)		
Phone no	Phone_no__c	Phone		

3. Select Data Type as a “Phone”

Setup - Object Manager - Customer1

Fields & Relationships

- Currency
- Date
- Date/Time
- Email
- Geolocation
- Number
- Percent
- Phone**
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Text Area (Rich)
- Text (Encrypted)
- Time
- URI

4. Click on next.

Setup - Object Manager - Customer1

Edit Customer Custom Field: Phone no

Custom Field Definition Edit

Field Information

Field Label: Phone no

Field Name: Phone_no

Data Type: Phone

Help Text:

Data Owner: User

Field Usage: -None-

Date/Time Visibility: -None-

Compliance Categorization:

Available: PI, HIPAA, GDPR, PCI

Chosen:

General Options

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

Default Value:

Save

5. Fill the Above as following:

- Field Label: Phone number

- Field Name : gets auto generated
- Click on Next >> Next >> Save and new.

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

9.2. To create another fields in an object:

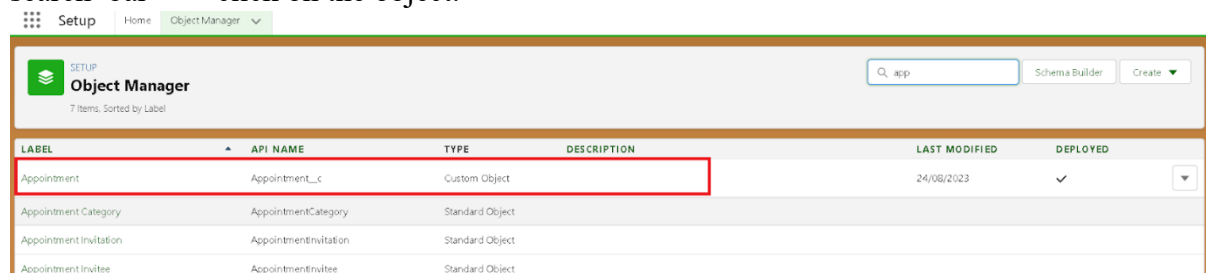
1. Go to setup >> click on Object Manager >> type object name(Customer Details) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select Data type as a “Email” and Click on Next
4. Fill the Above as following:
 - Field Label : Gmail
 - Field Name : gets auto generated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

TASK 10:

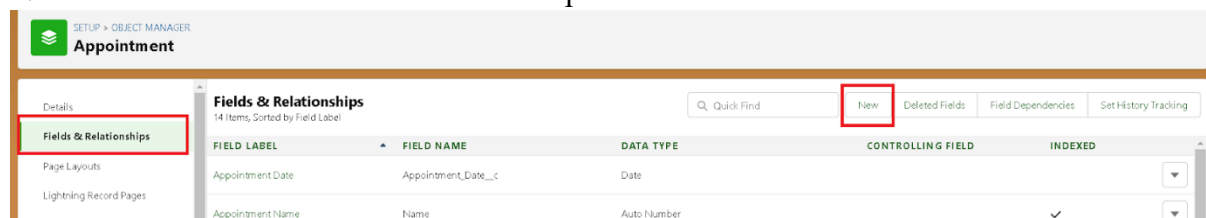
Creation of Lookup Fields

10.1 Creation of Lookup Field on Appointment Object :

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



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



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

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

Data Type

☐ None Selected Select one of the data types below.

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

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

☐ Roll-Up Summary A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

☒ **Lookup Relationship** Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.

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

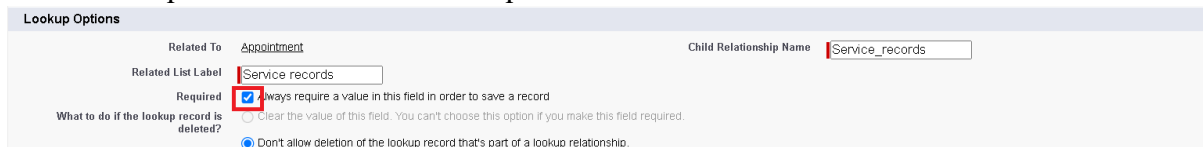
- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.

4. Select the related object “ Customer Details” and click next.
5. Next >> Next >> Save.

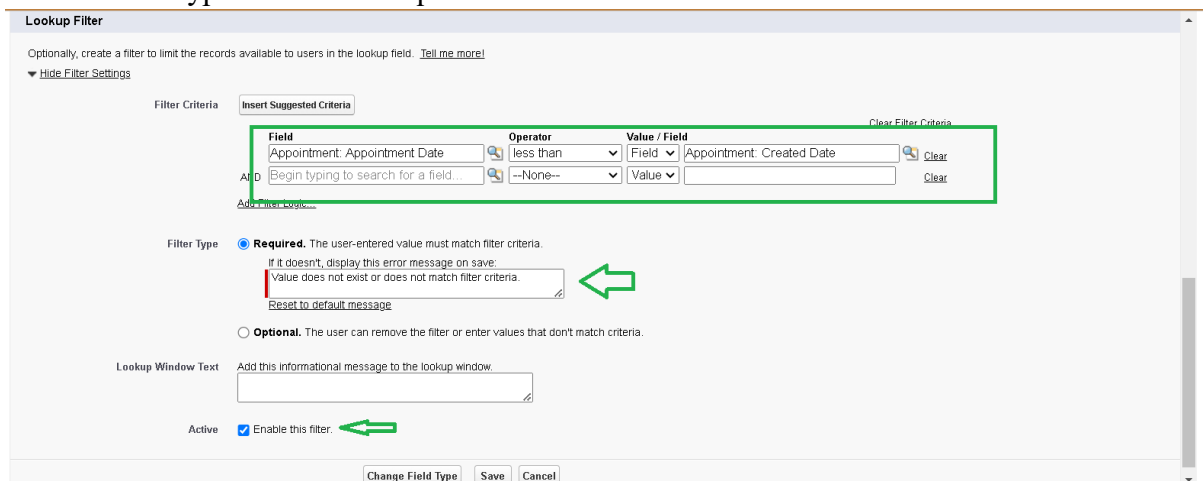
Note: Make sure you complete Activity 4 Before continuing.

10.2 Creation of Lookup Field on Service records Object :

1. Go to setup >> click on Object Manager >> type object name(Service records) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select “Look-up relationship” as data type and click Next.
4. Select the related object “ Appointment ” and click next.
5. Make it a required field so click on Required.



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.



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

10.3 Creation of Lookup Field on Billing details and feedback Object :

1. Go to setup >> click on Object Manager >> type object name(Billing details and feedback) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New.
3. Select “Look-up relationship” as data type and click Next.
4. Select the related object “ Service records” and click next.
5. Next >> Next >> Save & new.
- 6.

TASK 11:

Creation of Checkbox Fields

11.1 Creation of Checkbox Field on Appointment Object :

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

SETUP > OBJECT MANAGER
Appointment

Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules

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

Data Type

☐ None Selected
Select one of the data types below.

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

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

☐ Roll-Up Summary
A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.

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

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

- The relationship field is required on all detail records.
- The ownership and sharing of a detail record are determined by the master record.
- When a user deletes the master record, all detail records are deleted.
- You can create rollup summary fields on the master record to summarize the detail records.

The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list. Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.

☒ **Checkbox**
Allows users to select a True (checked) or False (unchecked) value.

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

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

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

Appointment
New Custom Field

[Help for this Page](#)

Step 2. Enter the details Step 2 of 4

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

Field Label

Default Value ☐ Checked ☒ Unchecked

Field Name

Description

Help Text

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

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

7. Click on next >> next >> save.

11.2 Creation of Another Checkbox Field on Appointment Object :

1. Repeat the steps from 1 to 3.
2. Give the Field Label : Repairs
3. Field Name : 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 Name : is auto populated
9. Default value : unchecked
10. Click on next >> next >> save.

11.3 Creation of Checkbox Field on Service records Object :

1. Go to setup >> click on Object Manager >> type object name(Service records) in search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select "Check box" as data type and click Next.
4. Give the Field Label : Quality Check Status

5. Field Nme : is auto populated
6. Default value : unchecked
7. Click on next >> next >> save

TASK 12:

Creation of date Fields

Creation of Date Field on Appointment Object :

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

Appointment
New Custom Field

Help for this Page ?

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label Appointment Date

Field Name Appointment_Date

Description

Help Text

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

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

Default Value Show Formula Editor

TASK 13:

Creation of Currency Fields

13.1 Creation of Currency Field on Appointment Object :

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

Step 2. Enter the details Step 2 of 4

Previous Next Cancel

Field Label

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

Length Decimal Places

Number of digits to the left of the decimal point Number of digits to the right of the decimal point

Field Name

Description

Help Text

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

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

6. Click on next

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

Appointment
New Custom Field Help for this Page

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

Previous Next Cancel

Field Label Service Amounts
Data Type Currency
Field Name Service_Amounts
Description

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

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

8. Click on next >> save.

13..2 Creation of Currency Field on Billing details and feedback Object :

- Follow the same steps as mentioned above in Billing details and feedback Object.
- Change the label name as mentioned.
- Give the Field Label : Payment Paid
- Field Name : is auto populated

TASK 14:

14.1 Creation of Text Fields

- Go to setup >> click on Object Manager >> type object name(Appointment) in the search bar >> click on the object.
- Now click on "Fields & Relationships" >> New.
- Select "Text" as data type and click Next.
- Give the Field Label : Vehicle number plate
- Field Name : is auto populated
- Length : 10
- 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.

14.2 Creation of Text Fields in Billing details and feedback object :

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

TASK 15:

Creation of Picklist Fields

15.1 Creation of Picklist Fields in Service records object :

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

15.2 Creation of Picklist Fields in Billing details and feedback object :

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

TASK 16:

Creating Formula Field in Service records Object

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

Step 2. Choose output type

Field Label:

Field Name:

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

Formula Return Type

☐ None Selected

☐ 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 >

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

service dates (Date) = CreatedDate

Insert Operator

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.

TASK 17:

To create a validation rule to an Appointment Object

1. Go to the setup page >> click on object manager >> From drop down click edit for Appointment object.
2. Click on the validation rule >> click New.

SETUP > OBJECT MANAGER

Appointment

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

New

3. Enter the Rule name as “ Vehicle ”.

4. 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: 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(REGEX(Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))

Check Syntax

Functions
-- All Function Categories --
ABS
ACOS
ADDMONTHS
AND
ASCII
ASIN
Insert Selected Function
ABS(number)
Returns the absolute value of a number, a number without its sign
Help on this function

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

Error Message

Example:
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

Save Save & New Cancel

TASK 18:

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

1. Go to the setup page >> click on object manager >> From drop down click edit for Billing details and feedback object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as “rating_should_be_less_than_5”.

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

Rule Name: rating_should_be_less_than_5

Active: ☒

Description:

Error Condition Formula:

Quick Tips: [Operators & Functions](#)

! = Required Information

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

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

Rule Name: rating_should_be_less_than_5

Active: ☒

Description:

Error Condition Formula: NOT(REGEX(Rating_for_service__c , "[1-5]{1}"))

Check Syntax

Insert Field: rating_should_be_less_than_5

Insert Operator: rating_should_be_less_than_5

Insert Selected Function: rating_should_be_less_than_5

ABS(number)
Returns the absolute value of a number, a number without its sign
[Help on this function](#)

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is true

Error Message: rating should be from 1 to 5

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

TASK 19:

To create a matching rule to an Customer details Object

1. Go to quick find box in setup and search for matching Rule.
2. Click on matching rule >> click on New Rule.

Setup [Home] [Object Manager]

Q matching ➡

✓ Data

✓ Duplicate Management

➡ Matching Rules

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

Matching Rules

All Matching Rules Help for this Page

What Are Matching Rules? [Expand]

View: [All Matching Rules] [Create New Rule](#)

➡ [New Rule](#)

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

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

Matching Rule
New Matching Rule

Help for this Page ?

Step 1 of 2

Next Cancel

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
4. 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	
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

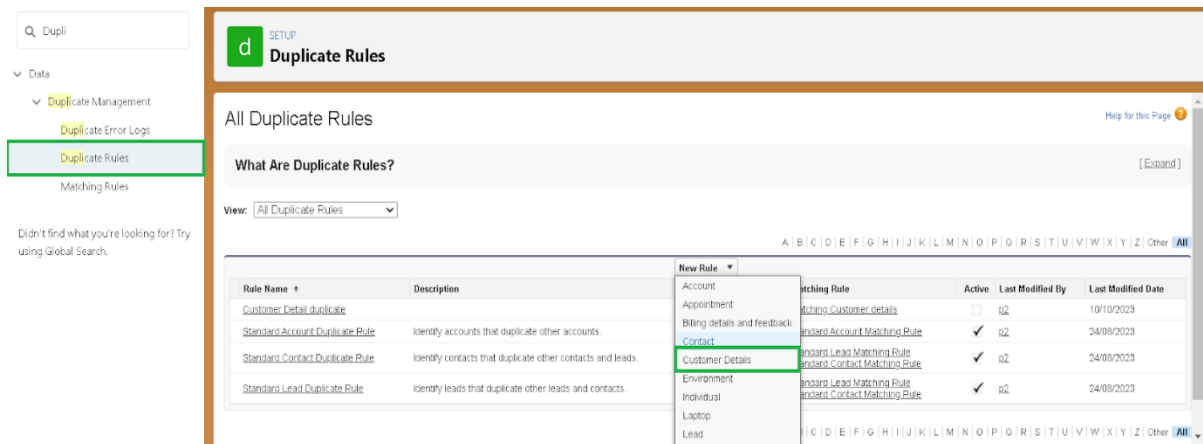
Edit Delete Clone Activate

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	project.2, 25/09/2023, 10:15 am
Modified By	project.2, 10/10/2023, 3:32 pm

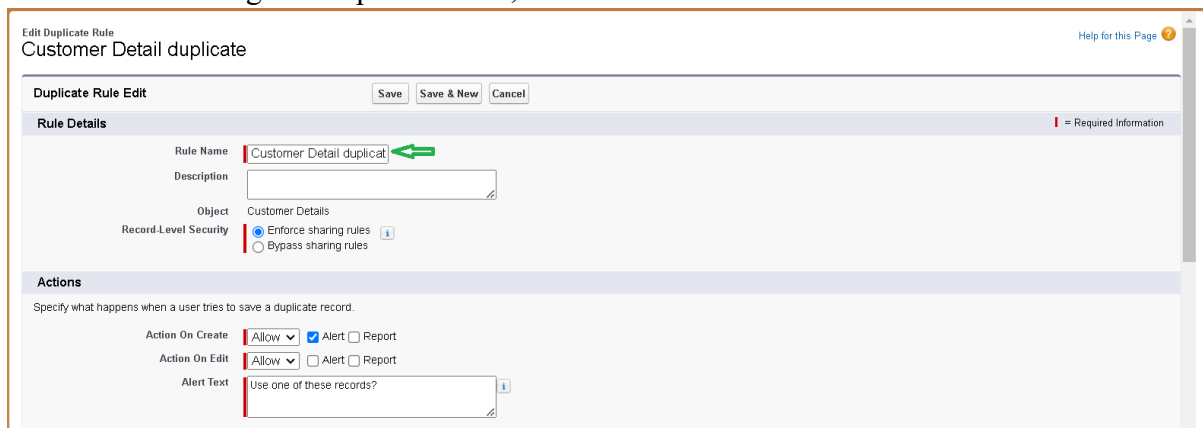
TASK 20:

To create a Duplicate rule to an Customer details Object

1. Go to quick find box in setup and search for Duplicate rules.
2. Click on Duplicate rule >> click on New Rule >> select customer details object.



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.

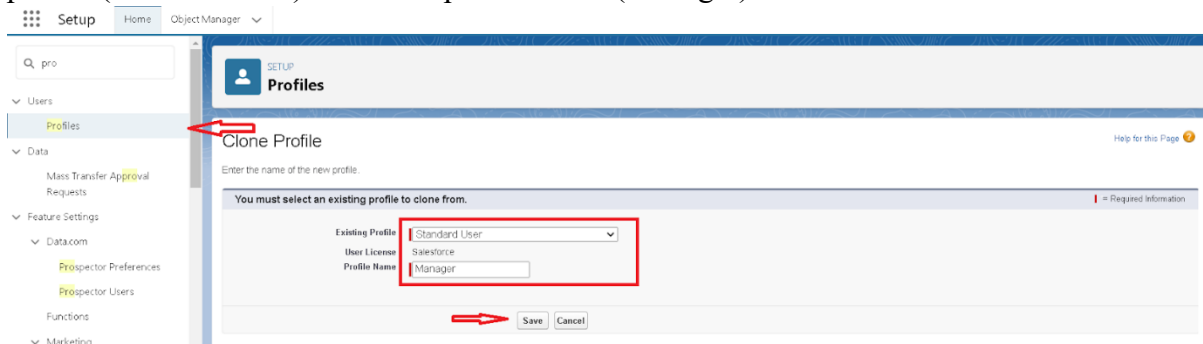


TASK 21:

Manager Profile

To create a new profile:

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (Manager) >> Save.



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 (0) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (0) | Enabled External Data Source Access (0) | Enabled Named Credential Access (0) | Enabled External Credential Principal Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Setting Definitions Access (0) | Enabled Flow Access (0) | Enabled Service Presence Status Access (0) | Enabled Custom Permissions (0)

Profile Detail Edit Clone Delete View Users

Name	Manager	Custom Profile	✓
User License	Salesforce		
Description			
Created By	sunny_1, 13/06/2023, 2:40 pm	Modified By	sunny_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.

	Basic Access				Data Administration	
	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"/>
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"/>
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"/>
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 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"/>

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.

TASK 22:

sales person Profile

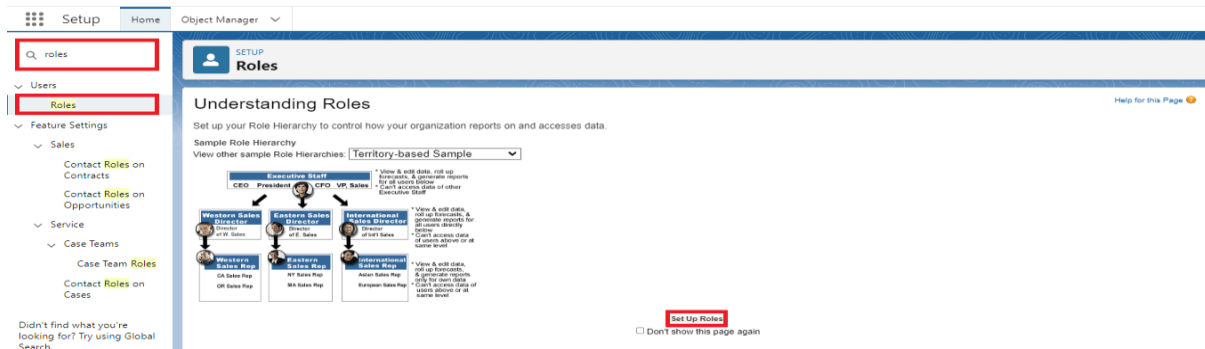
- Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Salesforce Platform User) >> enter profile name (sales person) >> Save.
- While still on the profile page, then click Edit.
- Select the Custom App settings as default for the GARage management.
- Scroll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

TASK 22:

Creating Manager Role

Creating Manager Role:

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



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



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

TASK 23:

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.

TASK 24:

Create User

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

New User

Help for this Page

User Edit

Save Save & New Cancel

General Information

First Name: Niklaus

Last Name: Mikaelson

Alias: nmika

Email:

Username: Mikaelson@Niklaus

Nickname: rik

Title:

Company:

Department:

Division:

Required Information

Role: Manager

User License: Salesforce

Profile: Manager

Active: ☒

Marketing User: ☐

Offline User: ☐

Knowledge User: ☐

Flow User: ☐

Service Cloud User: ☐

Site.com Contributor User: ☐

Site.com Publisher User: ☐

WDC User: ☐

Data.com User Type: --None--

3. Save.

TASK 25:

creating another users

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

Note : create atleast 3 users with these permissions.

TASK 26:

Creating New Public Group

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

Q public groups

Users

Public Groups

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

Public Groups

Help for this Page

A public group is a set of users. It can contain individual users, other groups, the users in a particular role or territory, or the users in a role or territory plus all of the users below that role or territory in the hierarchy.

View: All 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

Label	Group Name	Created By	Created Date
No records to display			

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 27:

Creating Sharing settings

1. Go to setup >> type users in quick find box >> select Sharing Settings >> click Edit.
2. Change the OWD setting of the Service records Object to private as shown in fig.

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

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

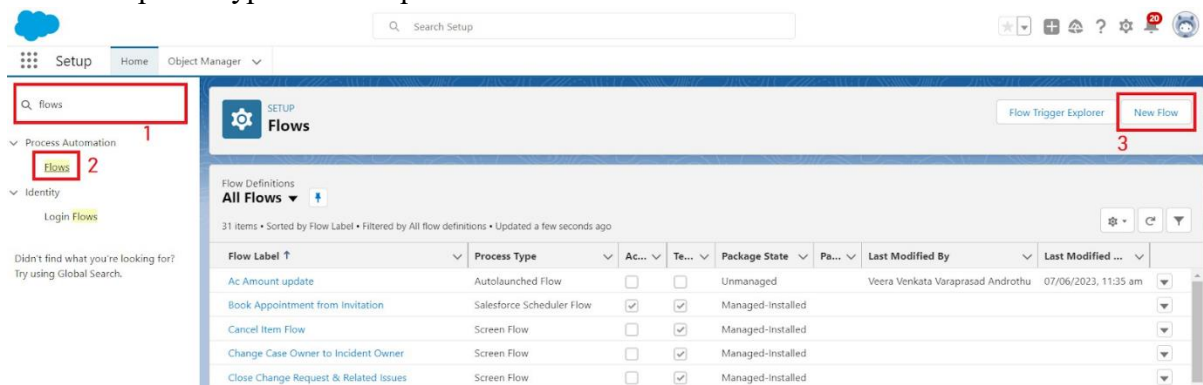
Access Level: Read/Write

Save Cancel

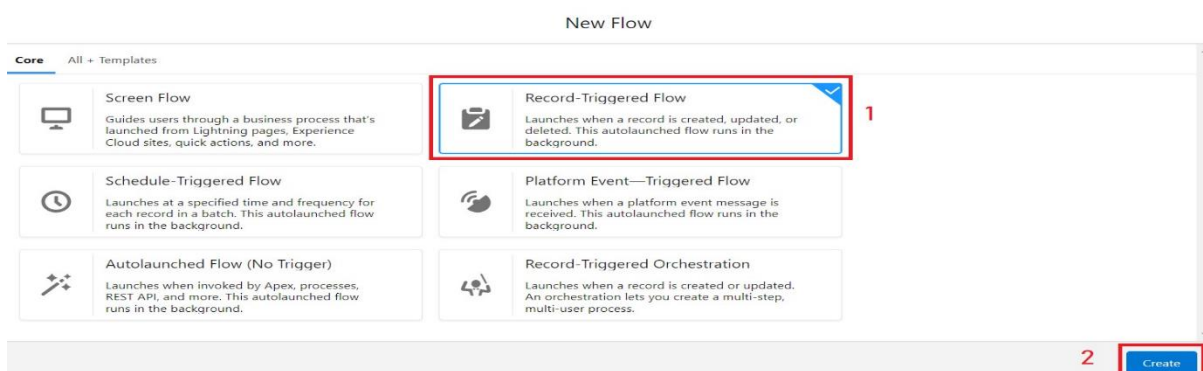
TASK 28:

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.



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.

men

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:

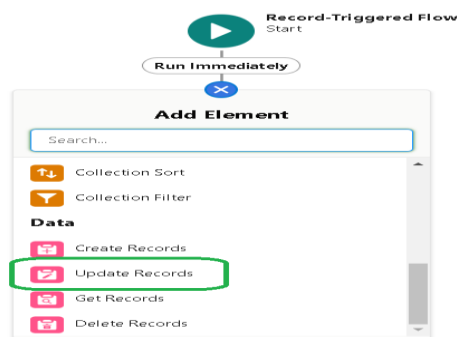
Fast Field Updates
Update fields on the record that triggers the flow to run. This high-performance flow runs *before* the record is saved to the database.

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.

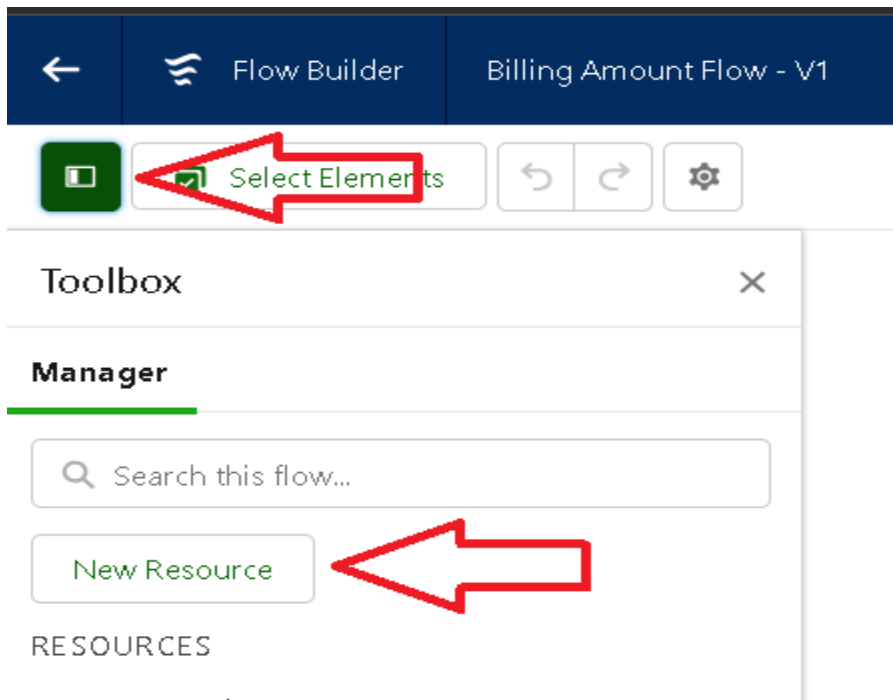
☐ Include a Run Asynchronously path to access an external system after the original transaction for the triggering record is successfully committed

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
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.

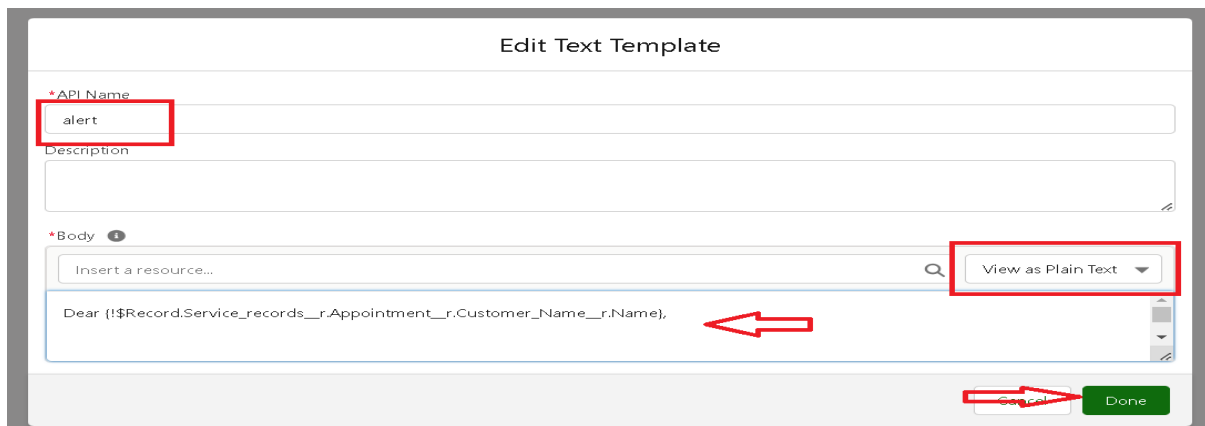
Dear {!\$Record.Service_records__r.Appointment__r.Customer_Name__r.Name},

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.



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: **Email Alert** *API Name: Email_Alert

Description:

Set Input Values for the Selected Action

A Body: **{!alert}** **Include**

A Email Template ID: **Don't Include**

Log Email on Send: **Don't Include**

Edit Action

A Recipient Address List: **{!\$Record.Service_records__r.Appointment__r.Customer_Name__r.Gmail__c}** **Include**

A Recipient ID: **Don't Include**

A Related Record ID: **Don't Include**

Rich-Text-Formatted Body: **Don't Include**

A Sender Email Address: **Don't Include**

A Sender Type: **Don't Include**

A Subject: **Thank You for Your Payment - Garage Management** **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: **Billing Amount Flow** *Flow API Name: **Billing_Amount_Flow**

Description:

Show Advanced

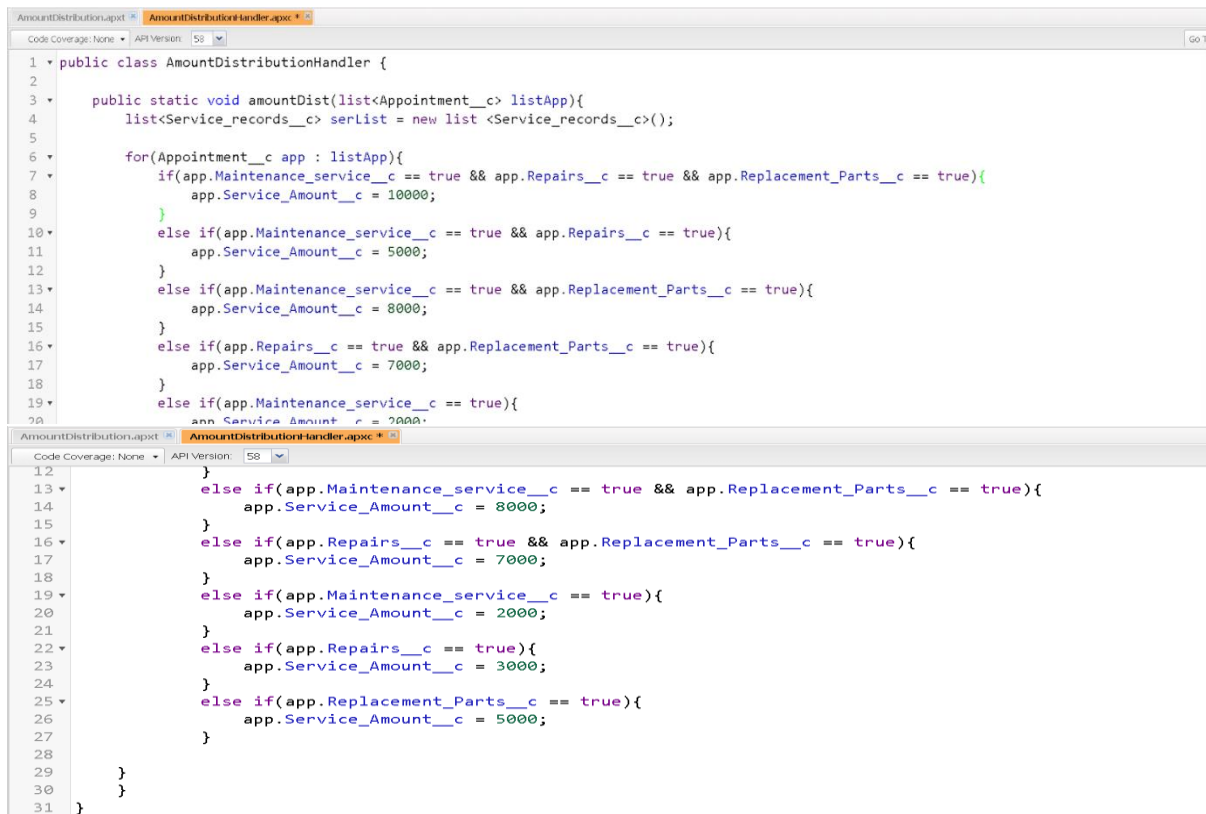
Cancel Save

TASK 30:

Apex handler

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

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



```
1 public class AmountDistributionHandler {
2
3     public static void amountDist(list<Appointment__c> listApp){
4         list<Service_records__c> serList = new list<Service_records__c>();
5
6         for(Appointment__c app : listApp){
7             if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){
8                 app.Service_Amount__c = 10000;
9             }
10            else if(app.Maintenance_service__c == true && app.Repairs__c == true){
11                app.Service_Amount__c = 5000;
12            }
13            else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
14                app.Service_Amount__c = 8000;
15            }
16            else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
17                app.Service_Amount__c = 7000;
18            }
19            else if(app.Maintenance_service__c == true){
20                app.Service_Amount__c = 2000;
21            }
22            else if(app.Repairs__c == true){
23                app.Service_Amount__c = 3000;
24            }
25            else if(app.Replacement_Parts__c == true){
26                app.Service_Amount__c = 5000;
27            }
28        }
29    }
30 }
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;
            }
        }
    }
}
```

```

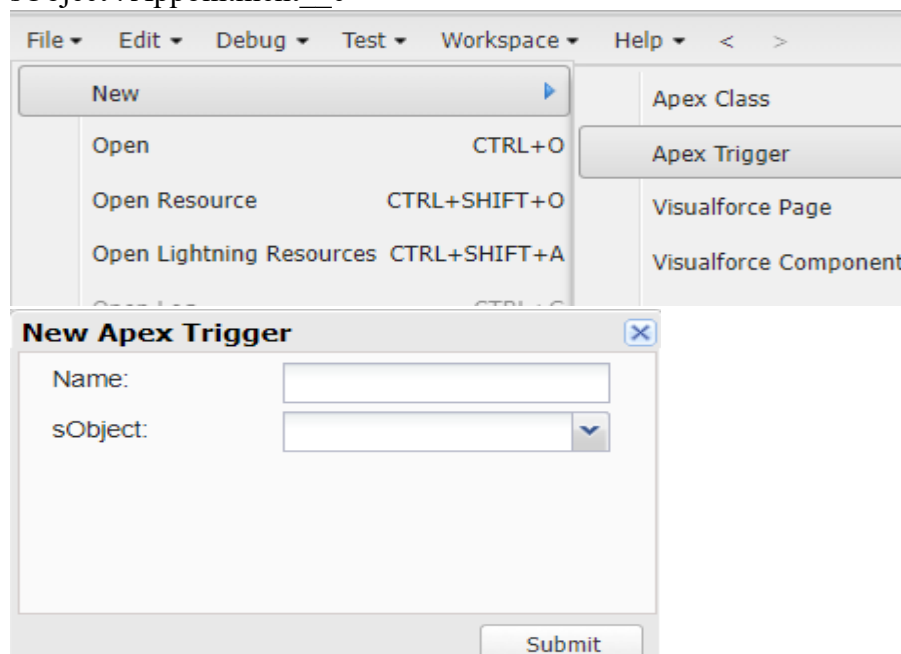
}
else if(app.Maintenance_service__c == true){
    app.Service_Amount__c = 2000;
}
else if(app.Repairs__c == true){
    app.Service_Amount__c = 3000;
}
else if(app.Replacement_Parts__c == true){
    app.Service_Amount__c = 5000;
}
}
}

```

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



Syntax For creating trigger :

The syntax for creating trigger is :

Trigger [trigger name] on [object name](Before/After event)

```

{
}

```

In this project , trigger is called whenever the particular records sum exceed the threshold i.e minimum business requirement value. Then the code in the trigger will get executed.

1. Handler for the Appointment Object

```

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

```

Code:

```

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

```

TASK 31:

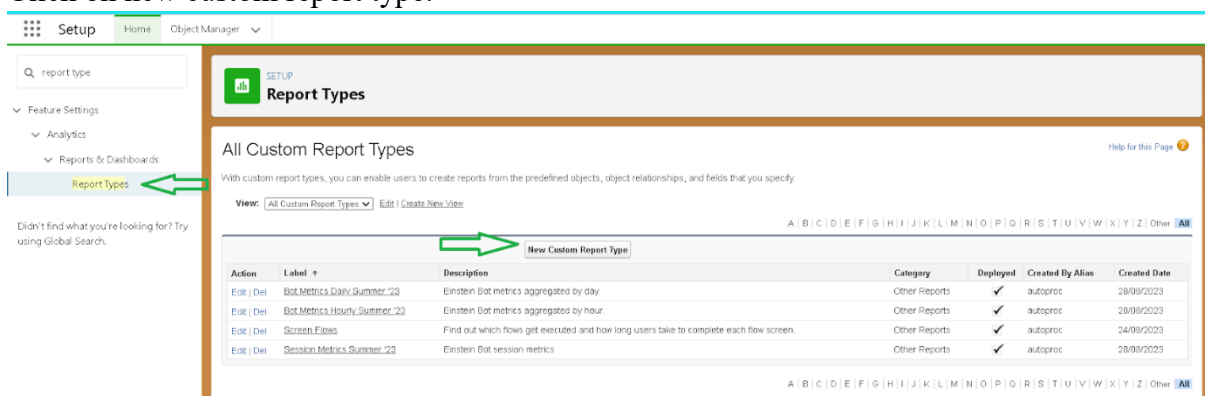
Sharing a report folder

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

TASK 32:

Create Report Type

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



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.

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: **Service information**

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**

Next **Cancel**

9. now , Click on Related object box.

10. Click on Select Object, choose Appointment Object as shown in fig.

New Custom Report Type
Service information

Step 2. Define Report Records Set Step 2 of 2

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

Previous **Save** **Cancel**

Step 2. Define Report Records Set

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

A Customer Details
Primary Object

B Appointments

A to B Relationship:

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

(Click to relate another object)

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 object.

A Customer Details
Primary Object

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

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

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

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

Previous Save Cancel

TASK 33:

Create Report

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

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

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

Search...

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

Reports
Recent
2 items

Search recent reports... New Report New Folder

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

FOLDERS

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

Create Report

Category
Customer Support Reports

Leads
Campaigns
Activities
Contracts and Orders
Price Books, Products and Assets
Administrative Reports
File and Content Reports
Individuals
Other Reports
Hidden Report Types

Select a Report Type

Search: ser

Report Type Name	Category
Service records	Standard
Service records with Appointment	Standard
Service records History	Standard
Billing details and feedback with Service records	Standard
Service information	Custom

Details

Service information
Custom Report Type

Start Report

Description
Service information

Created By You
No Reports Yet

Created By Others
No Reports Yet

4. Their outline pane is opened already, select the fields that mentioned below in column section.
 - a. Customer name
 - b. Appointment Date
 - c. Service Status
 - d. Payment paid
5. Remove the unnecessary fields.
6. Select the fields that mentioned below in GROUP ROWS section.
 - a. Rating for Service
7. Select the fields that mentioned below in GROUP ROWS section.
 - a. 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 displays the 'New Service information Report' interface. The top section shows a table with columns: Rating for service, Payment Status, Completed, and Total. The table data is as follows:

Rating for service	Payment Status	Completed	Total
4	Sum of Payment Paid	€15,000	€15,000
	Record Count	4	4
5	Sum of Payment Paid	€5,000	€5,000
	Record Count	2	2
Total	Sum of Payment Paid	€20,000	€20,000
	Record Count	6	6

To the right of the table is a line chart titled 'Sum of Payment P.' with 'Rating for service' on the x-axis (values 4 and 5) and 'Sum of Payment P.' on the y-axis (values 0, 8k, 16k). The chart shows a downward trend from 15,000 at rating 4 to 5,000 at rating 5.

Below the table is a 'Details (6 Rows)' section with columns: Customer Name, Appointment Date, Service Status, and Payment Paid. The data is as follows:

Customer Name	Appointment Date	Service Status	Payment Paid
1 meghana	11/10/2023	Completed	€8,000
2 rushi	08/09/2023	Completed	€3,000
3 shivam	12/10/2023	Completed	€2,000
4 shivam	12/10/2023	Completed	€2,000
5 rushi	08/09/2023	Completed	€3,000

At the bottom, the 'Save Report' dialog box is open, showing the following fields:

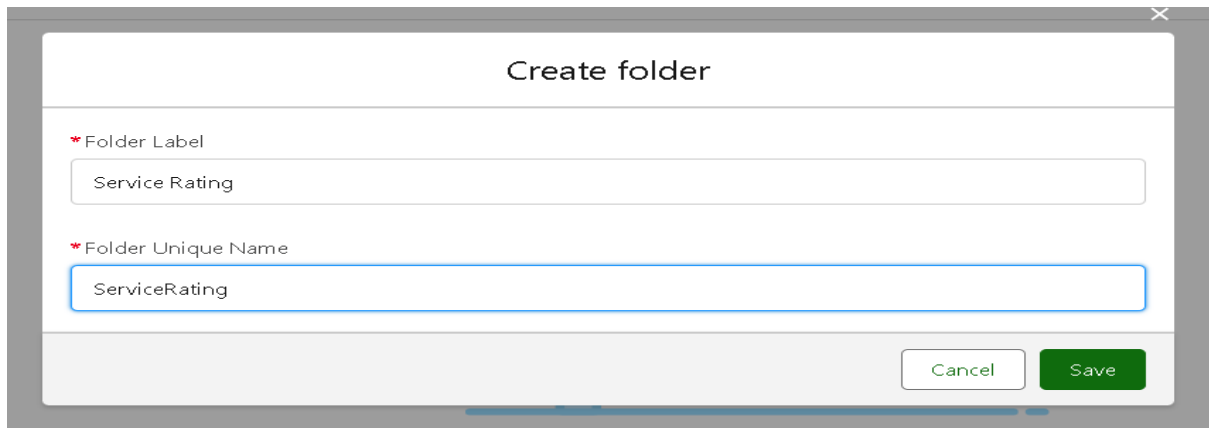
- Report Name: New Service Information Report (indicated by a green arrow pointing left)
- Report Unique Name: New_Service_Information_Report_LoVu
- Report Description: (empty text area)
- Folder: Garage Management Folder (indicated by a green arrow pointing left)

The 'Save' button is highlighted in green at the bottom right of the dialog box.

TASK 34:

Create Dashboard Folder

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



Create folder

* Folder Label

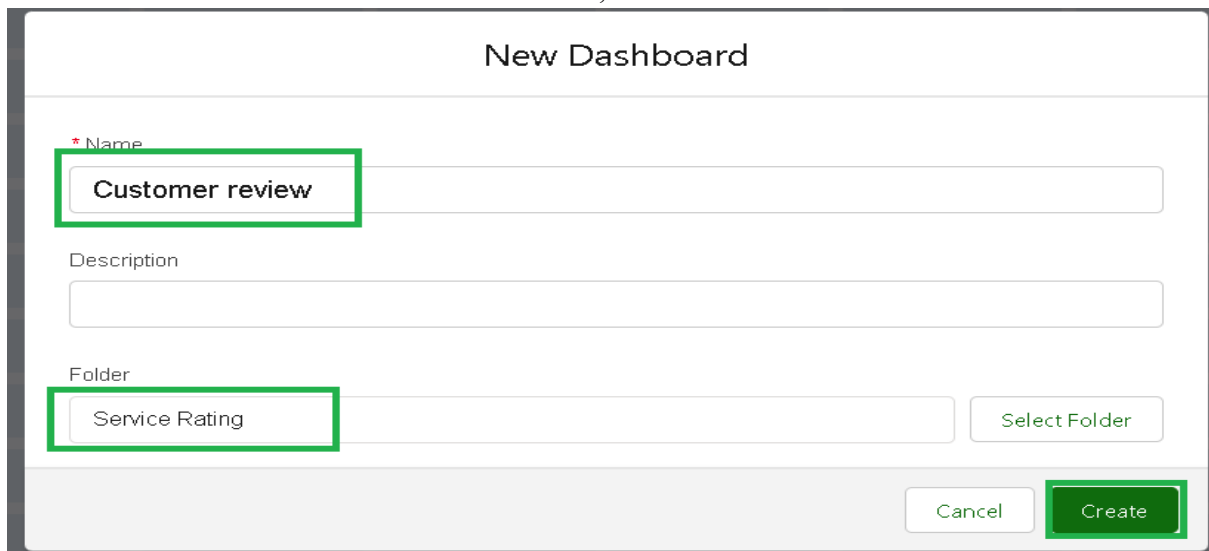
* Folder Unique Name

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

TASK 35:

Create Dashboard

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



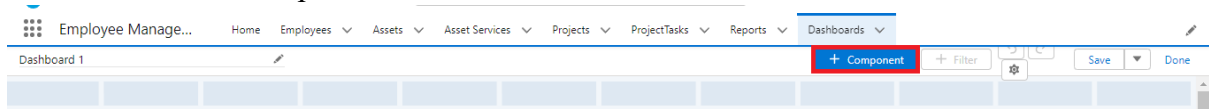
New Dashboard

* Name

Description

Folder

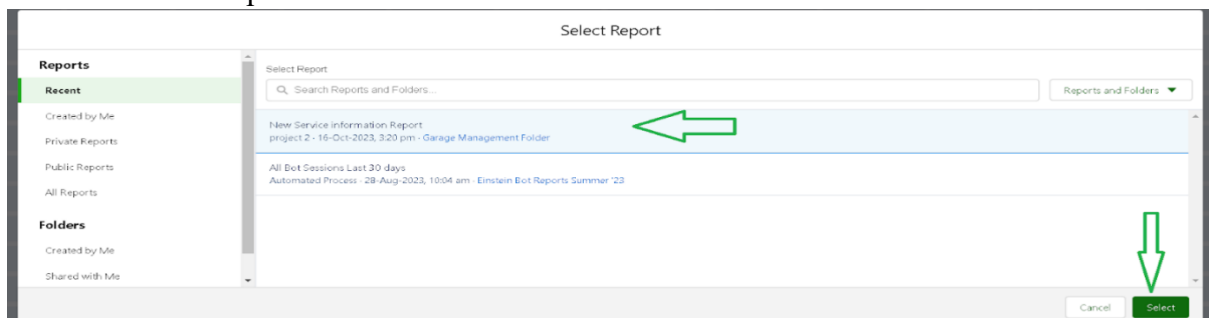
3. Select add component.



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

Dashboard 1

4. Select a Report and click on select.



Select Report

Recent

- Created by Me
- Private Reports
- Public Reports
- All Reports

Folders

- Created by Me
- Shared with Me

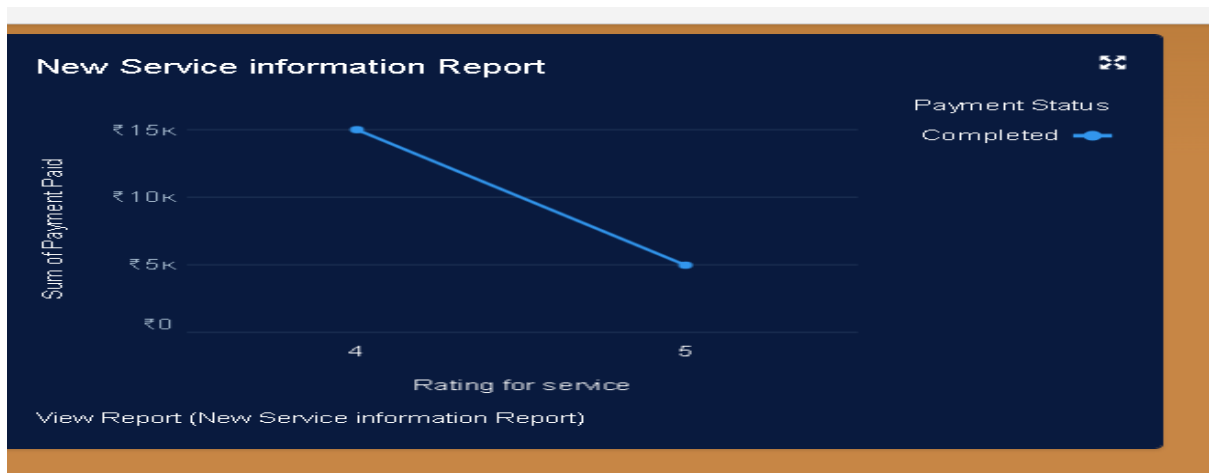
Select Report

Reports and Folders

New Service Information Report
 project 2 - 16-Oct-2023, 3:20 pm - Garage Management Folder

All Bot Sessions Last 30 days
 Automated Process - 29-Aug-2023, 10:04 am - Einstein Bot Reports Summer '23

5. Select the Line Chart. 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 Subscribe on top right.
9. Set the Frequency as “ weekly ”.
10. Set a day as monday.
11. And Click on save.

Edit Subscription

Schedule dashboard refreshes and subscribe to receive results.

Settings

Frequency: ☐ Daily ☒ Weekly ☐ Monthly

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

Time: 3:00 pm

Recipients

☒ Receive new results by email when dashboard is refreshed.

Send email to: Me

[Edit Recipients](#)

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

TASK 36:

creating records

To create a record in the follow objects follow these steps

1. Click on the app launcher located at the left side of the screen.
2. Search for “ **Garage Management**” and click on it.
3. Click on the “ **Consumer details** tab”.
4. Click on new and fill the details as shown below figs, and click save.

New Customer Detail

* = Required Information

Information

* Customer Name: Mac

Phone number: 5678765567

Gmail: mac@gmail.com

Owner: Annapurna SmartBridge

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

Now, Create the Appointment Record

1. Click on the “**Appointment** tab”.

2. Enter the customer details as created, while entering Appointment Date enter the date less than the created date.
3. Match the validation while entering the vehicle number plate.
4. Select the services you need.
5. Click on save to see the Service Amount.

The screenshot shows a web application interface for managing appointments. The top navigation bar includes 'Garage Manage...', 'Customer Details', 'Appointments', 'Service records', 'Billing details and feedback', 'Reports', and 'Dashboards'. The 'Appointments' tab is active, displaying a form for appointment 'app-016'. The form fields include: Appointment Name (app-016), Customer Details (Mac), Appointment Date (13/11/2024), Maintenance service (checked), Repairs (checked), Replacement Parts (unchecked), Service Amount (empty), and Vehicle number plate (TS30EU0443). The form is owned by 'Annapurna SmartBridge' and has 'Cancel' and 'Save' buttons at the bottom.

Now, Create a service Record

1. Click on the “**Service record** tab”.
2. Enter the Appointment, and started is selected as default.
3. Click on save.

The screenshot shows a web application interface for creating a new service record. The form is titled 'New Service record' and includes a legend indicating that an asterisk (*) denotes required information. The form fields include: Service Record Name (empty), Appointment (app-016), Quality Check Status (unchecked), and Service Status (Started). The form is owned by 'Annapurna SmartBridge' and has 'Cancel', 'Save & New', and 'Save' buttons at the bottom.

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

Conclusion

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