

Introduction:

Are you new to Salesforce? Not sure exactly what it is, or how to use it? Don't know where you should start on your learning journey? If you've answered yes to any of these questions, then you're in the right place. This module is for you.

Welcome to Salesforce! Salesforce is game-changing technology, with a host of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we'll take you through these features and answer the question, "What is Salesforce, anyway?".

What Is Salesforce?

Salesforce is your customer success platform, designed to help you sell, service, market, analyze, and connect with your customers.

Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, before Salesforce, your contacts, emails, follow-up tasks, and prospective deals might have been organized something like this:

<https://youtu.be/r9EX3IGde5k>

GARAGE MANAGEMENT SYSTEM

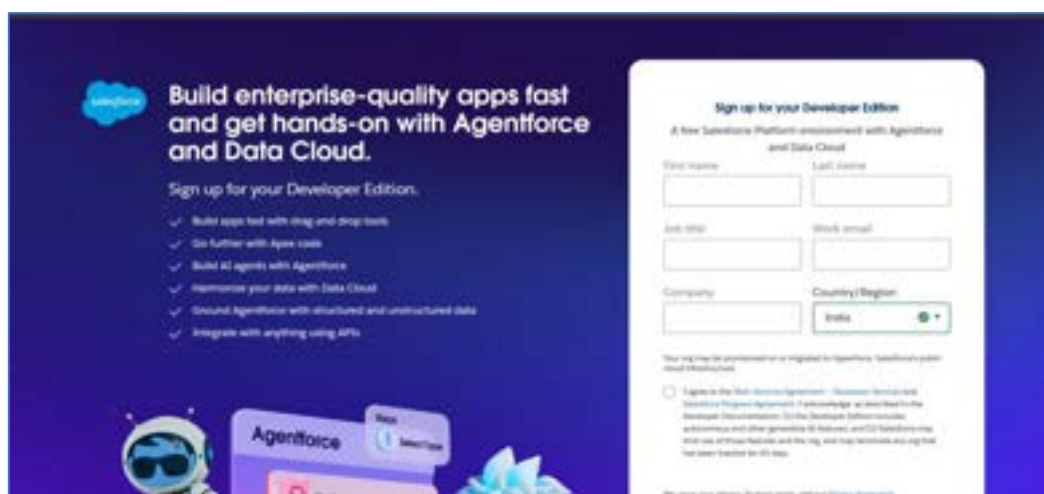
MILESTONE -1

Salesforce

ACTIVITY – 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:



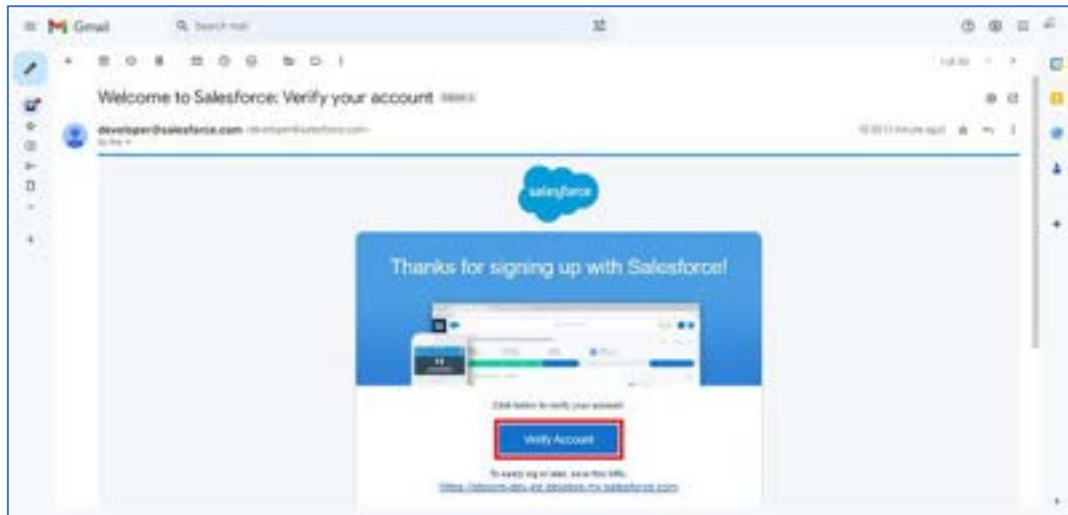
- **FIRST NAME:** Lavanna
- **LAST NAME:** Bandi
- **JOB TITLE:** Developer
- **WORK EMAIL:** lavakumarkushakumar@gmail.com
- **COMPANY:** Gayatri Degree College Tirupati
- **COUNTRY/ REGION:** India

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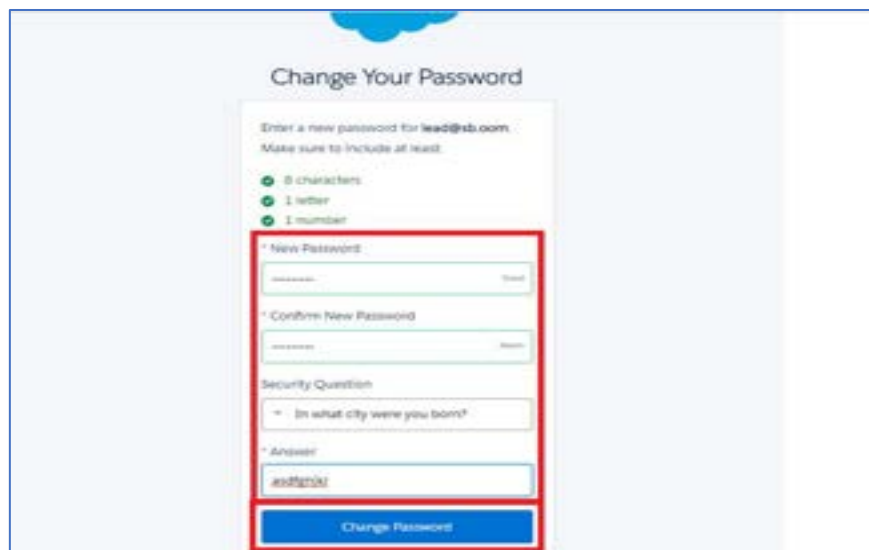
Activity 2: Account Activation:

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.

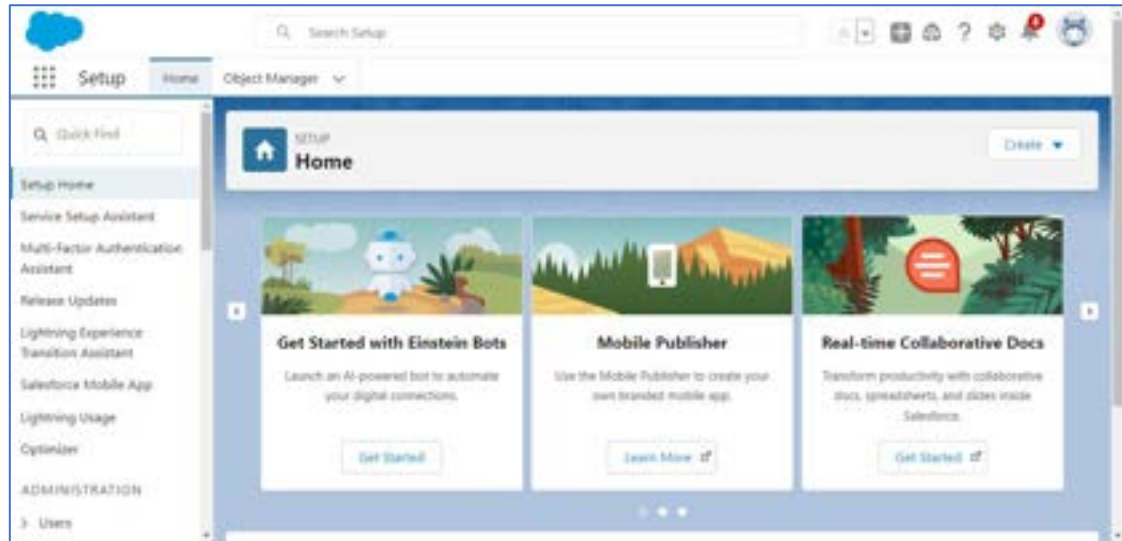


2. Click on Verify Account
3. Give a password and answer a security question and click on change password.



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



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MILESTONE – 2

OBJECT

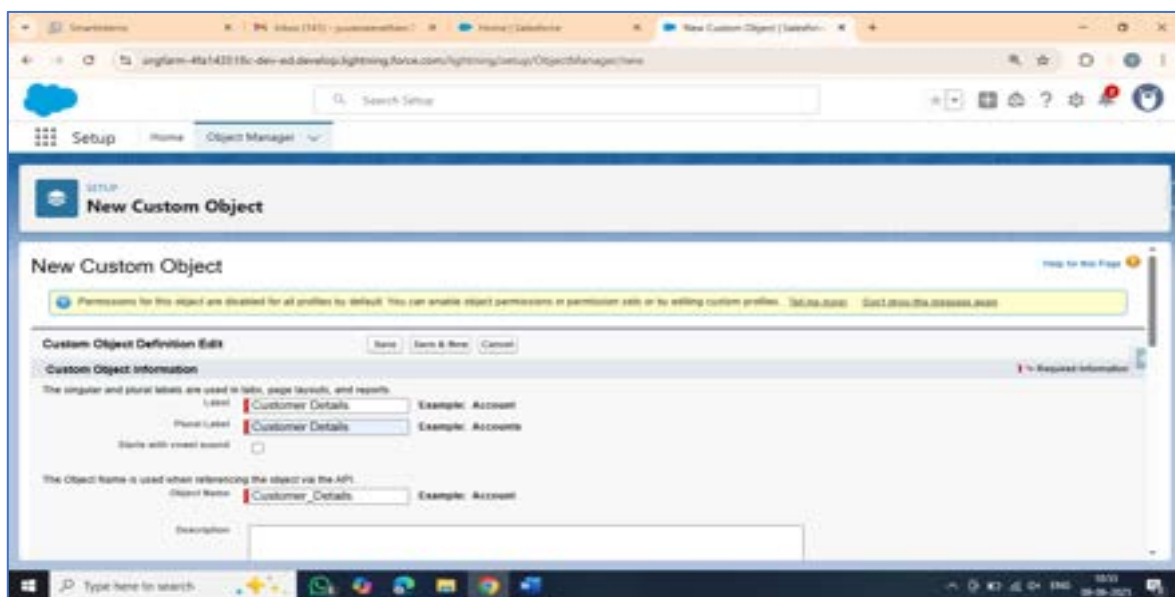
ACTIVITY – 1: Create Customer Details Object

To create an object:

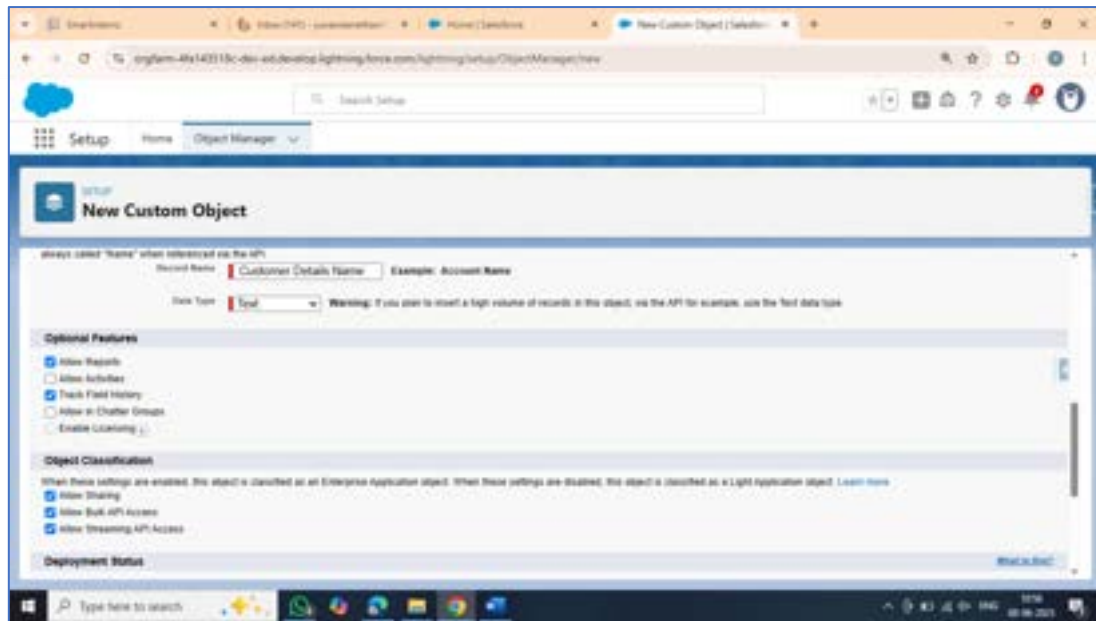
1. From the setup page >> Click on Object Manager >> Click on Create >> Click on Custom Object.



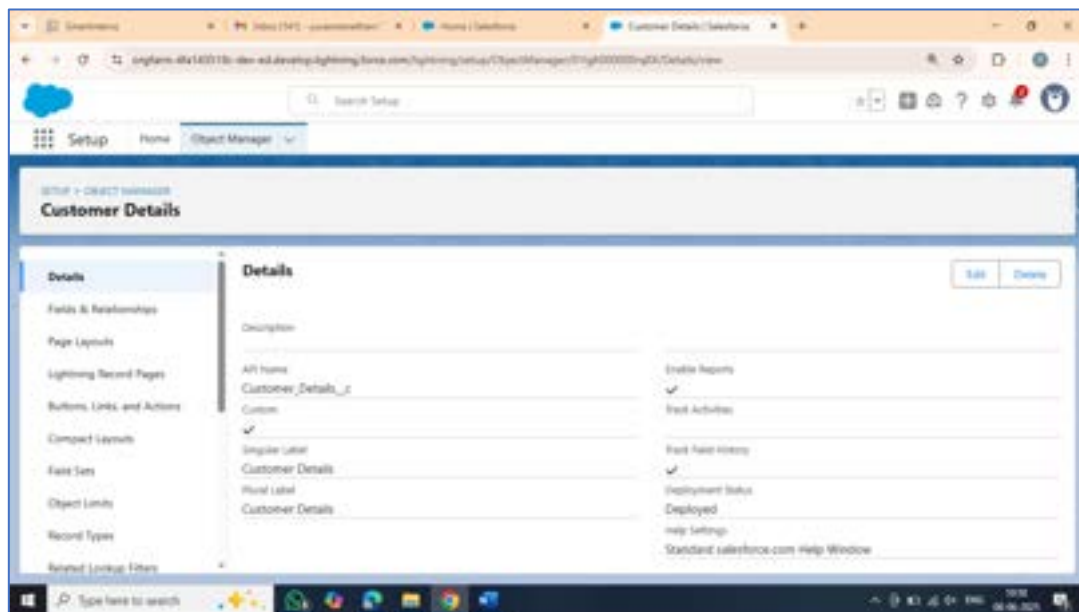
2. Enter the label name >> Customer Details
3. Plural label name >> Customer Details



4. Enter Record Name Label and Format
 5. Record Name >> Customer Name
 6. Data Type >> Text
- Click on Allow reports and Track Field History.



7. Allow search >> Save.



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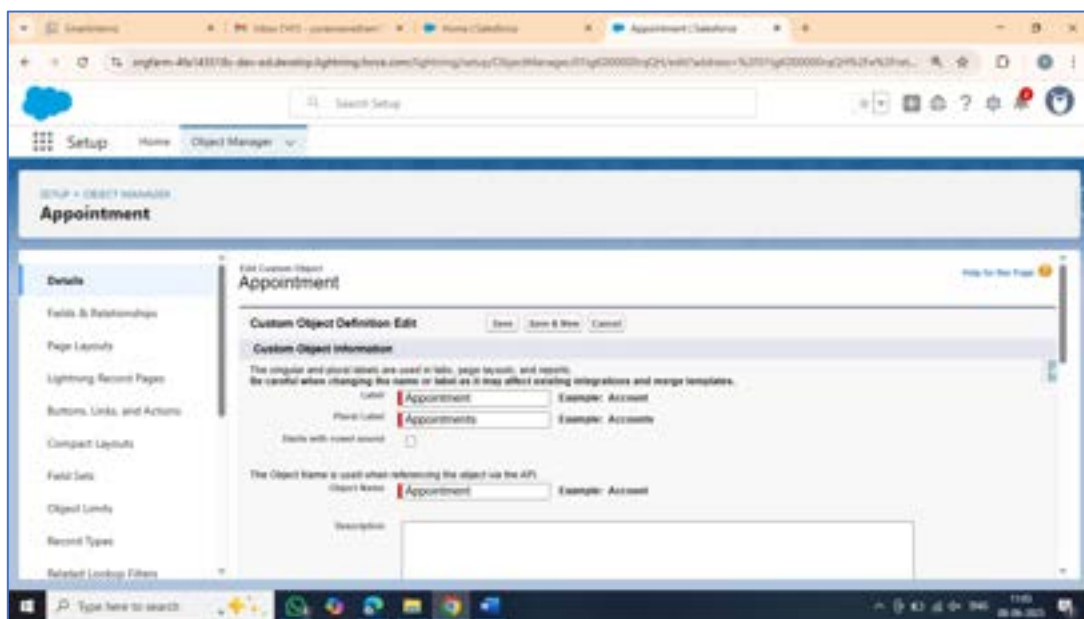
ACTIVITY – 2 : Create Appointment Object

To create an object:

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

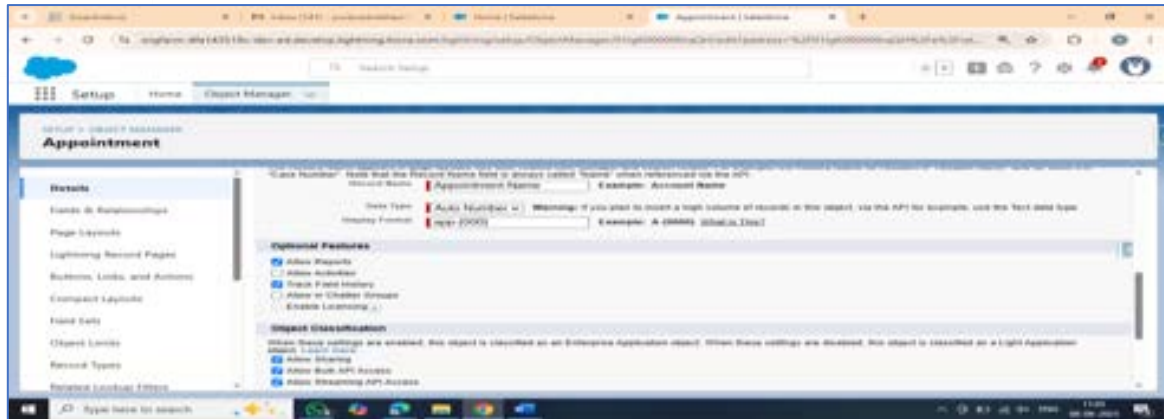


2. Enter the label name >> Appointment
3. Plural label name >> Appointments

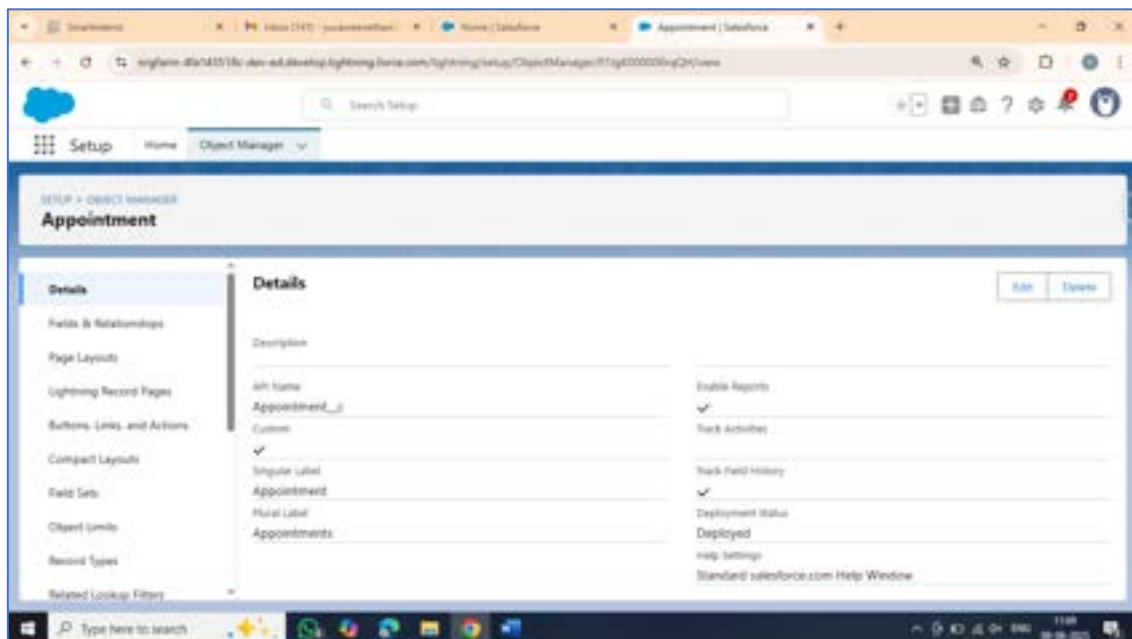
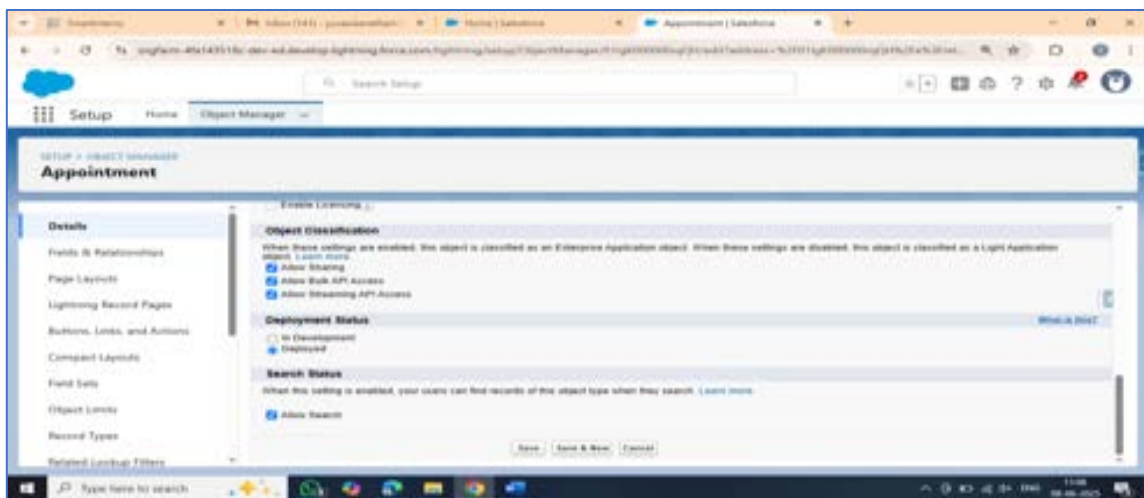


3. Enter Record Name Label and Format
 - Record Name >> Appointment Name
 - Data Type >> Auto Number
 - Display Format >> app- {000}
 - Starting number >> 1
4. Click on Allow reports and Track Field History.

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4. Allow search >> Save.



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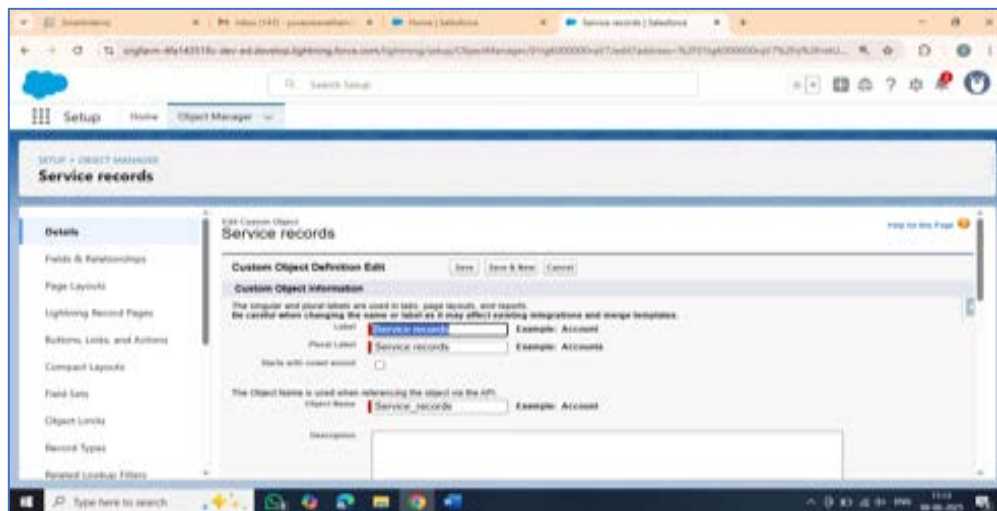
ACTIVITY -3 :- Create Service records Object

To create an object:

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

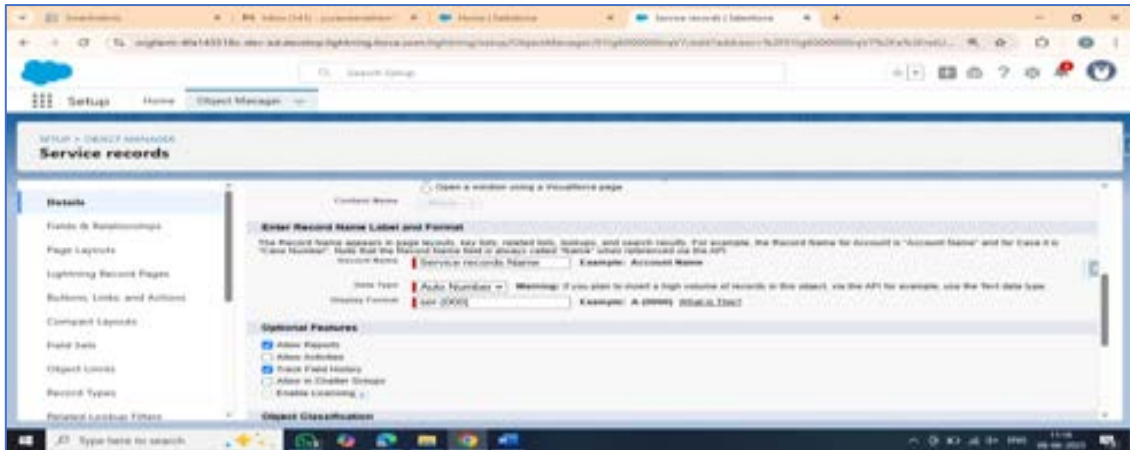


- Enter the label name >> Service records
- Plural label name >> Service records

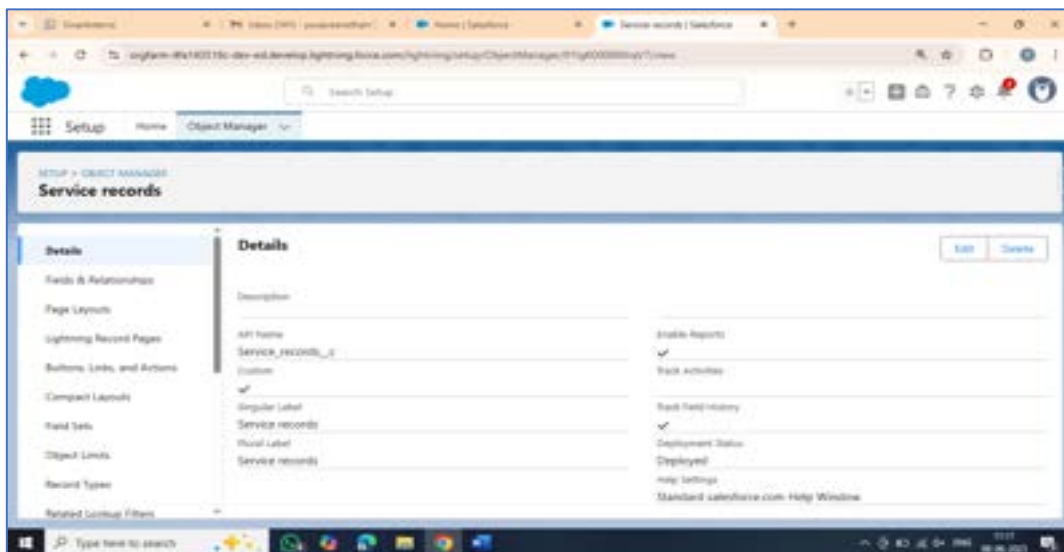
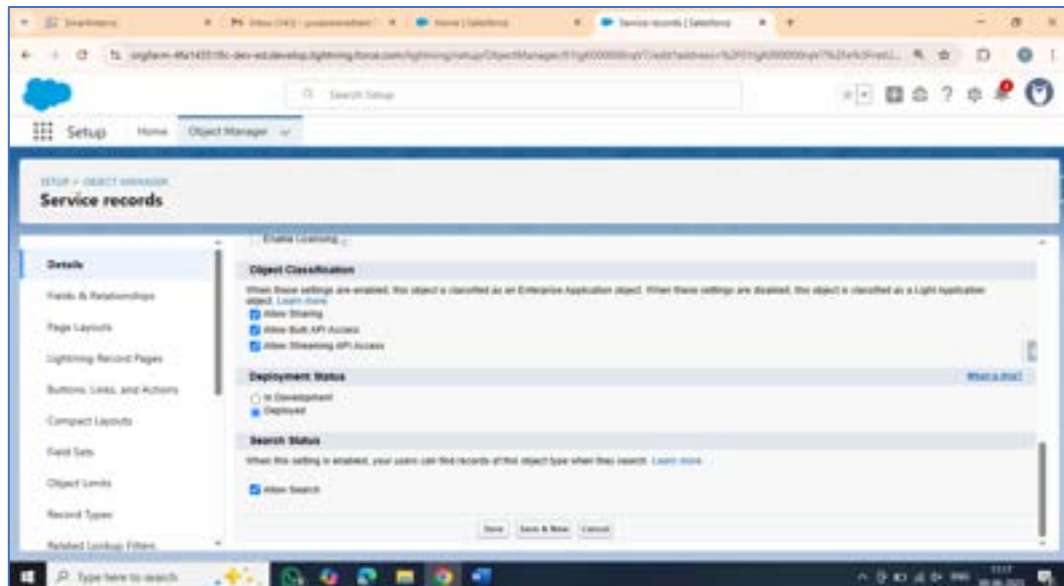


- Enter Record Name Label and Format
 - Record Name >>Service records Name
 - Data Type >> Auto Number
 - Display Format >> ser- {000}
 - Starting number >> 1
- Click on Allow reports and Track Field History,

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6. Allow search >> Save.



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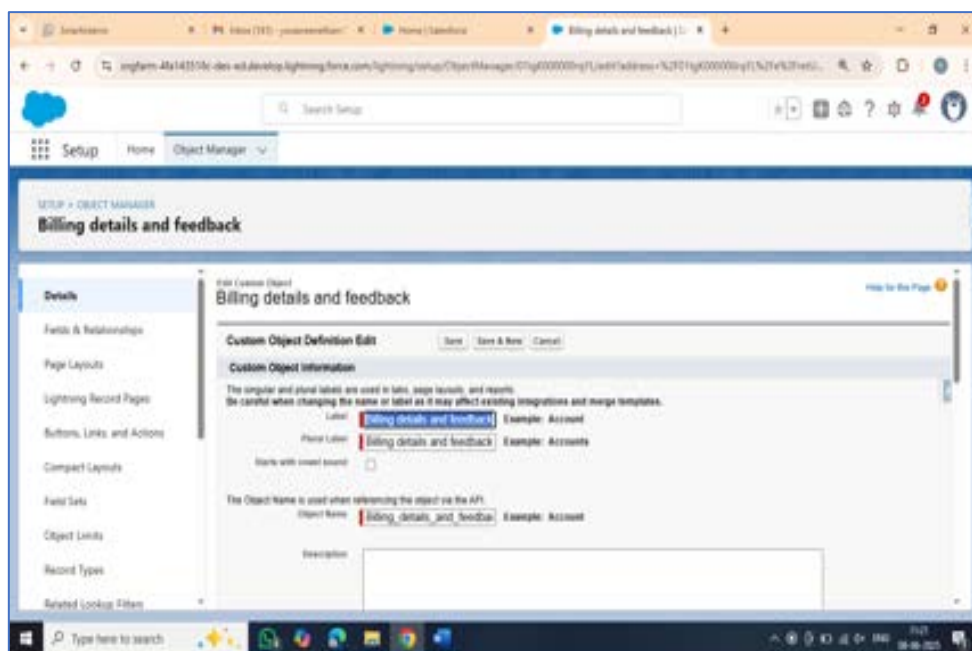
ACTIVITY – 4: Create Billing details and feedback Object

To create an object:

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

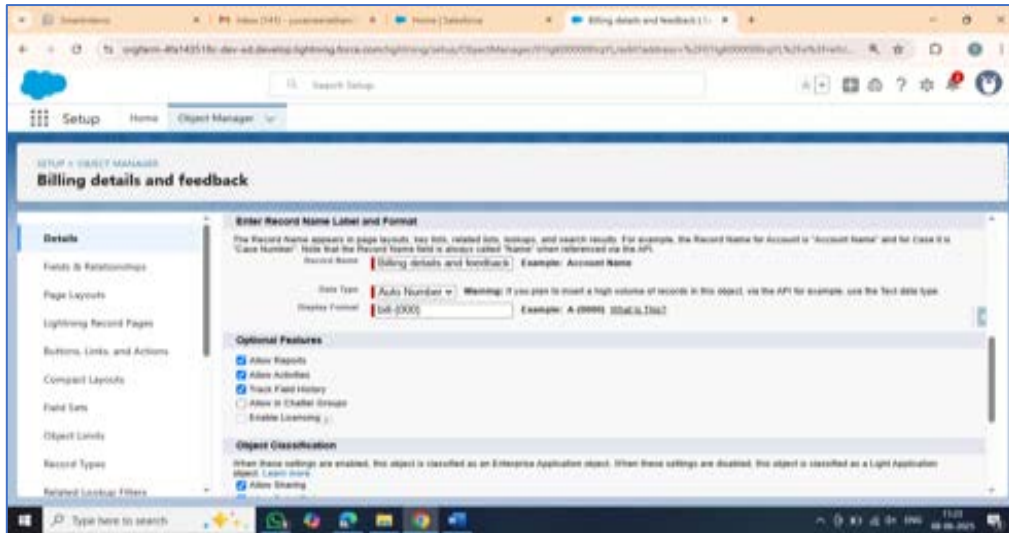


1. Enter the label name >> Billing details and feedback
2. Plural label name >> Billing details and feedback
3. Enter Record Name Label and Format

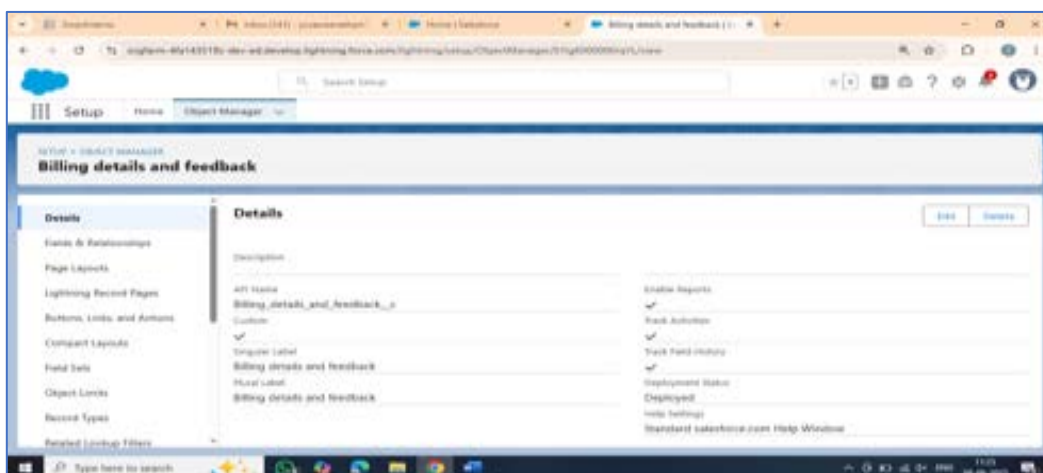
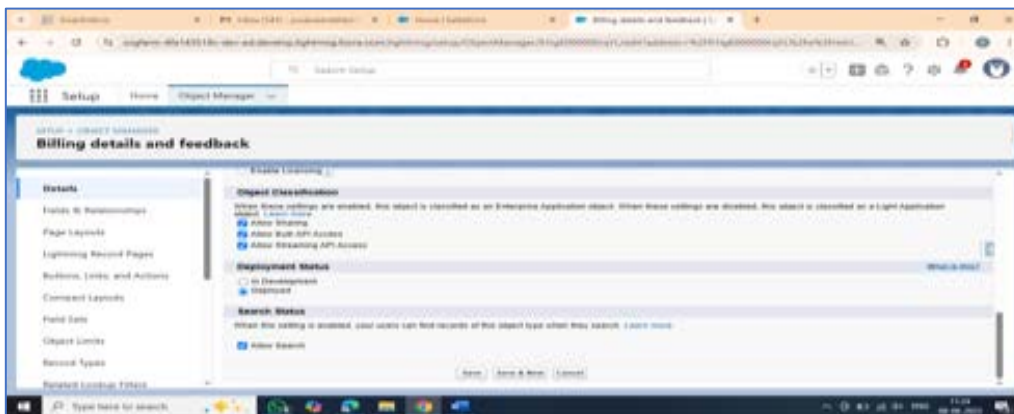


- Record Name >> Billing details and feedback Name
 - Data Type >> Auto Number
 - Display Format >> bill- {000}
 - Starting number >> 1
4. Click on Allow reports and Track Field History,

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5. Allow search >> Save.



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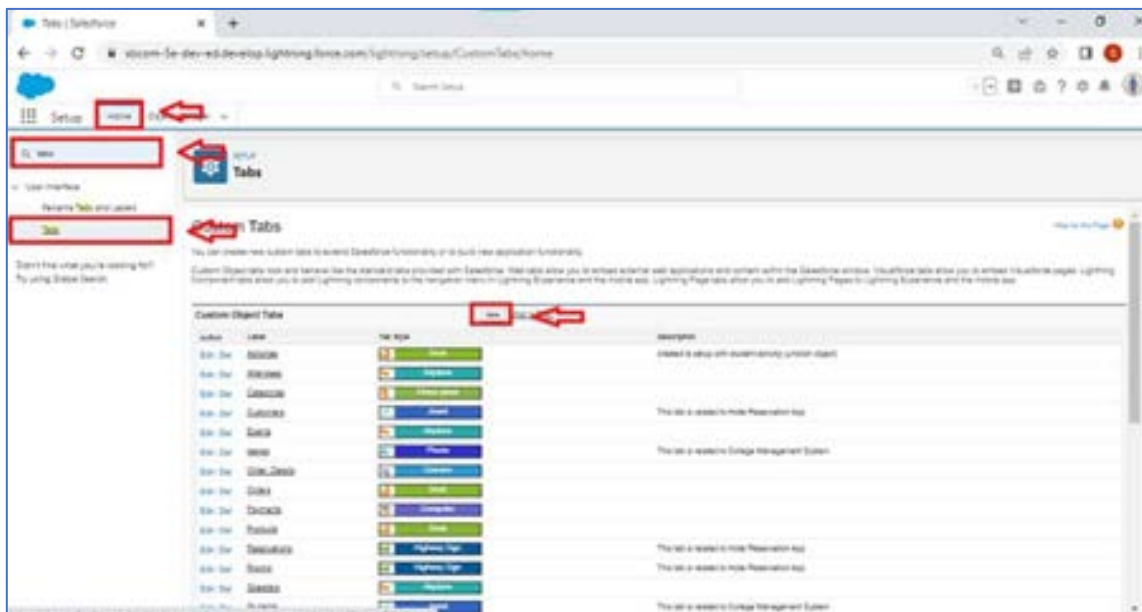
MILESTONE -3

TABS

ACTIVITY -1 :- Creating a Custom Tab

To create a Tab:(Customer Details)

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



- 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

The screenshot shows the 'New Custom Object Tab' form. The form is titled 'New Custom Object Tab' and has a progress bar showing 'Step 1 of 3'. The 'Step 1: Enter the Details' section is active. The form includes fields for 'Object' (set to 'Customer Details'), 'Tab Style' (set to 'Default'), and 'Include in Custom App' (unchecked). There is also a 'Description' field.

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

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Step 3. Add to Custom App Step 3 of 3

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

Custom App	<input type="checkbox"/> Include Tab
Platform (standard__Platform)	<input type="checkbox"/>
Sales (standard__Sales)	<input type="checkbox"/>
Service (standard__Service)	<input type="checkbox"/>
Marketing (standard__Marketing)	<input type="checkbox"/>
Sample Console (standard__ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal User	<input type="checkbox"/>
Authenticated Website User	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>

Analytics Studio (standard__Insights)	<input type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input type="checkbox"/>
Service Console (standard__LightningService)	<input type="checkbox"/>
Sales (standard__LightningSales)	<input type="checkbox"/>
Lightning Image App (standard__LightningImageApp)	<input type="checkbox"/>
Digital Experiences (standard__BaseExperience)	<input type="checkbox"/>
Queue Management (standard__QueueManagement)	<input type="checkbox"/>
Self-Service (standard__LightningSelf)	<input type="checkbox"/>
Data Manager (standard__DataManager)	<input type="checkbox"/>
Salesforce Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>
<input checked="" type="checkbox"/> Agent tab to users' existing personal customizations	

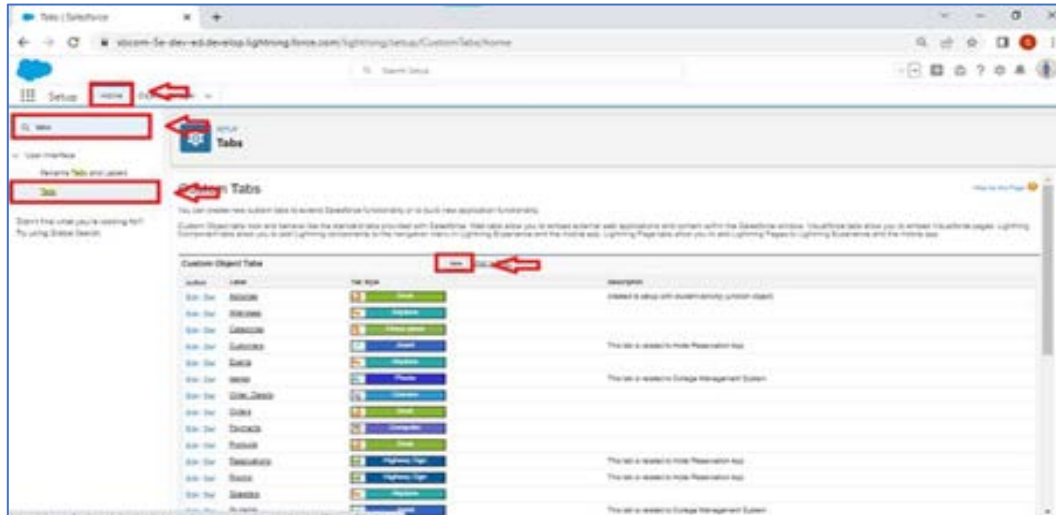
Previous Save Cancel

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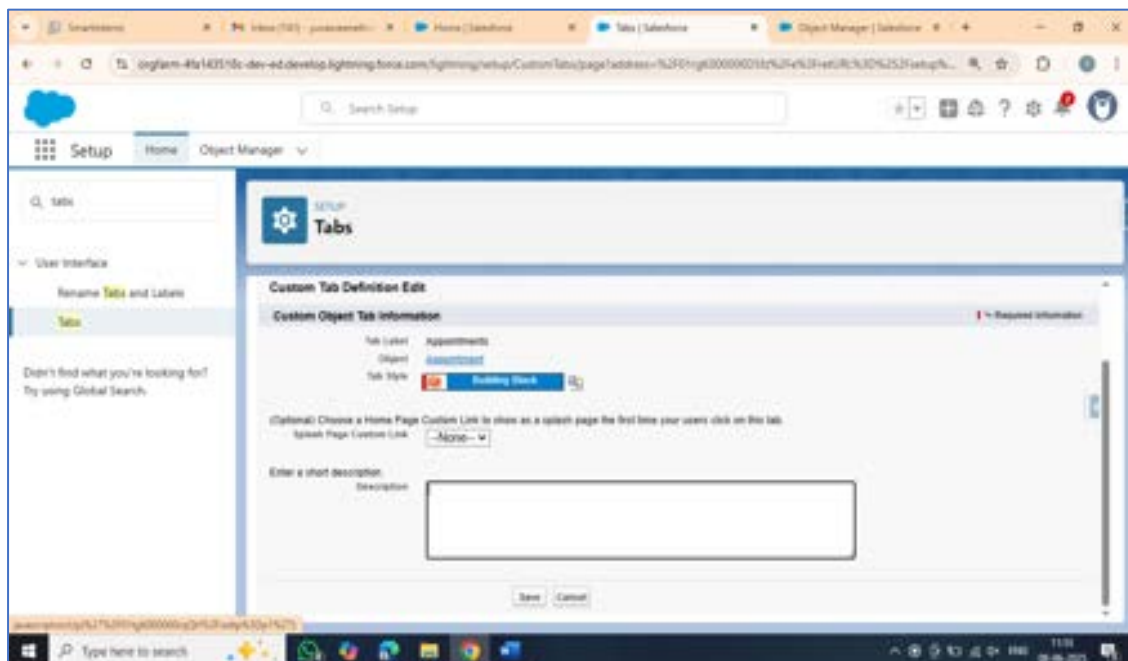
ACTIVITY – 2: Creating Remaining Tabs

To create a Tab:(Appointments)

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



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



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

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Step 3: Add to Custom Apps Step 3 of 3

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

Custom App	<input type="checkbox"/> Include Tab
Platform (standard__Platform)	<input type="checkbox"/>
Sales (standard__Sales)	<input type="checkbox"/>
Service (standard__Service)	<input type="checkbox"/>
Marketing (standard__Marketing)	<input type="checkbox"/>
Service Console (standard__ServiceConsole)	<input type="checkbox"/>
High Volume Customer Portal (std)	<input type="checkbox"/>
Authenticated Web User	<input type="checkbox"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>

Analytics Studio (standard__Insights)	<input type="checkbox"/>
Sales Console (standard__LightningSalesConsole)	<input type="checkbox"/>
Service Console (standard__LightningService)	<input type="checkbox"/>
Sales (standard__LightningSales)	<input type="checkbox"/>
Lightning Image App (standard__LightningImageApp)	<input type="checkbox"/>
Digital Experiences (standard__SalesforceCMS)	<input type="checkbox"/>
Queue Management (standard__QueueManagement)	<input type="checkbox"/>
Self-Service (standard__LightningSelf)	<input type="checkbox"/>
Data Manager (standard__DataManager)	<input type="checkbox"/>
Service Scheduler Setup (standard__LightningScheduler)	<input type="checkbox"/>
<input checked="" type="checkbox"/> Append tab to users' existing personal customizations	

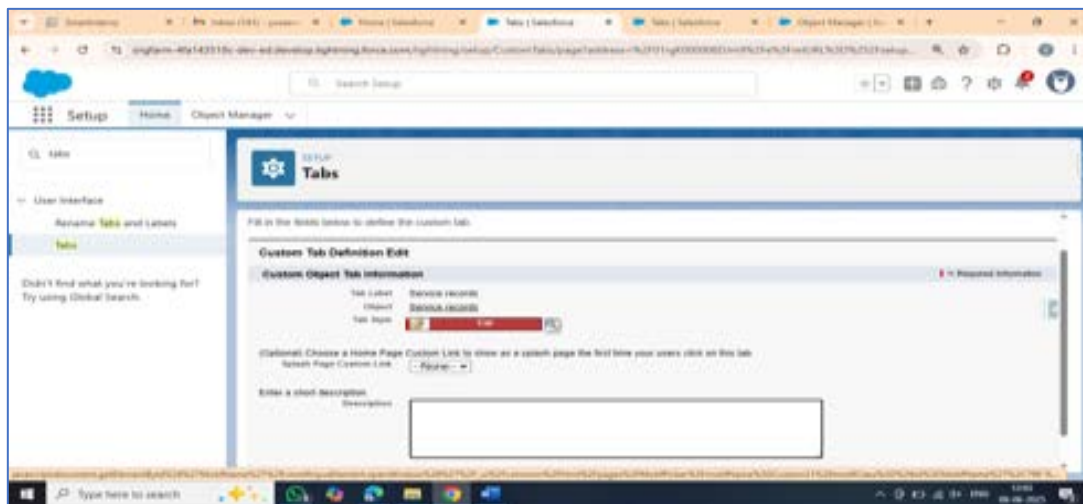
Previous Save Cancel

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ACTIVITY -3 :- SERVICE RECORDS

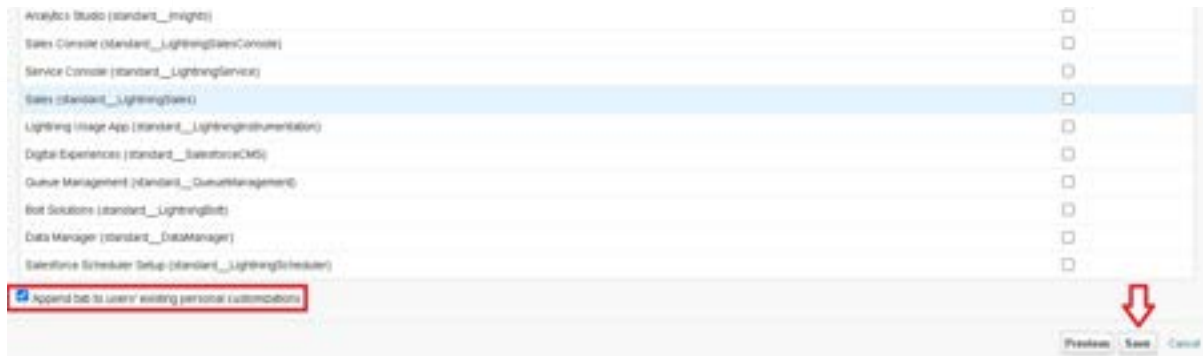
To create a Tab:(Service records)

- Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
- Select Object (Service records) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab.



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

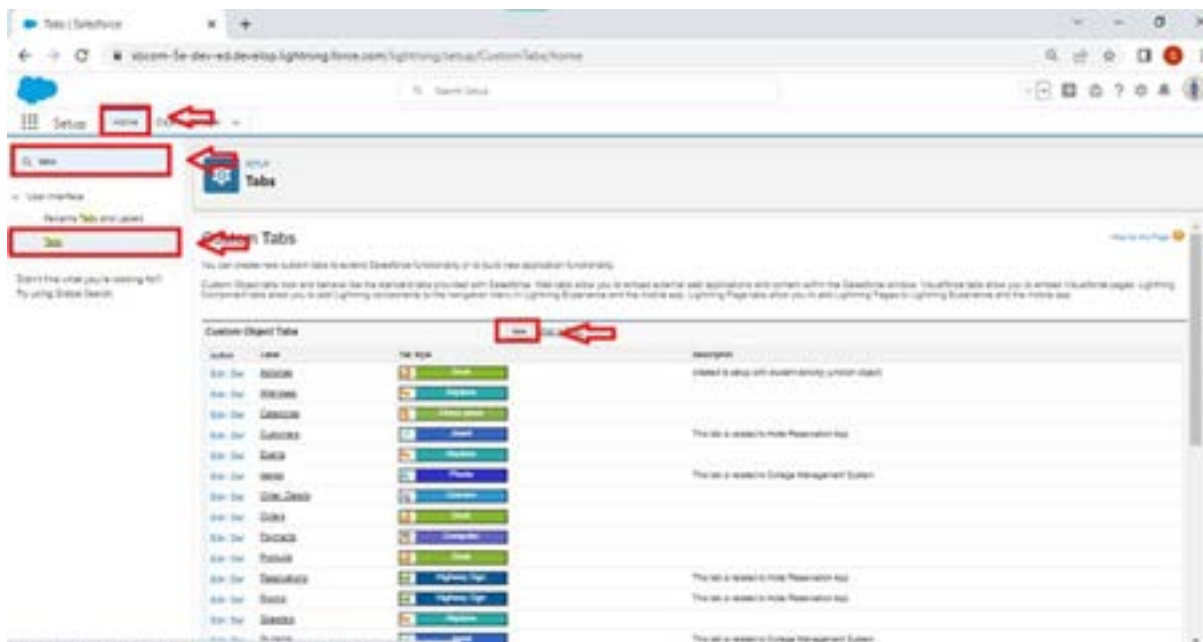




ACTIVITY – 4:- BILLING DETAILS AND FEEDBACK

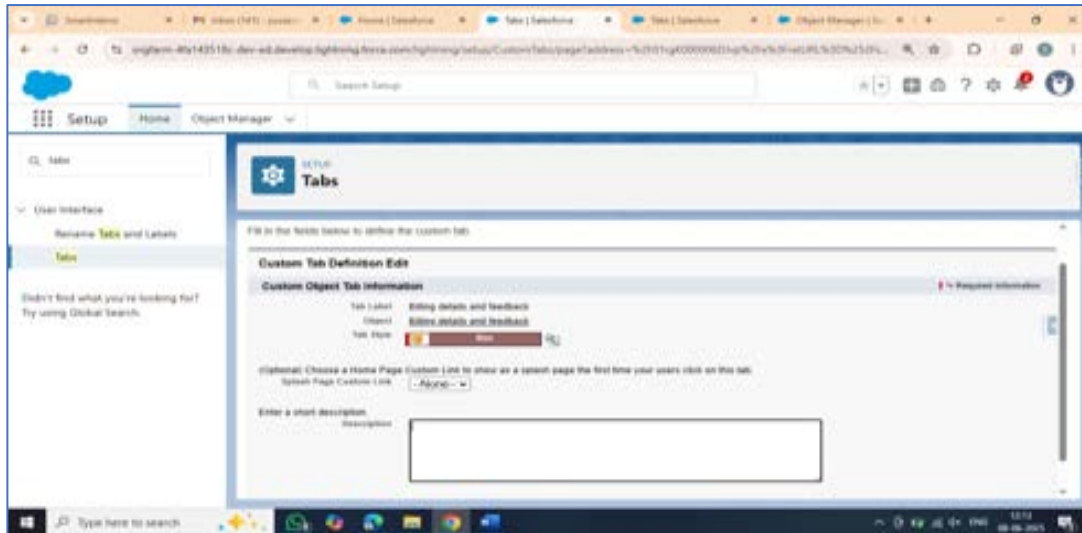
To create a Tab:(Billing details feedback)

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

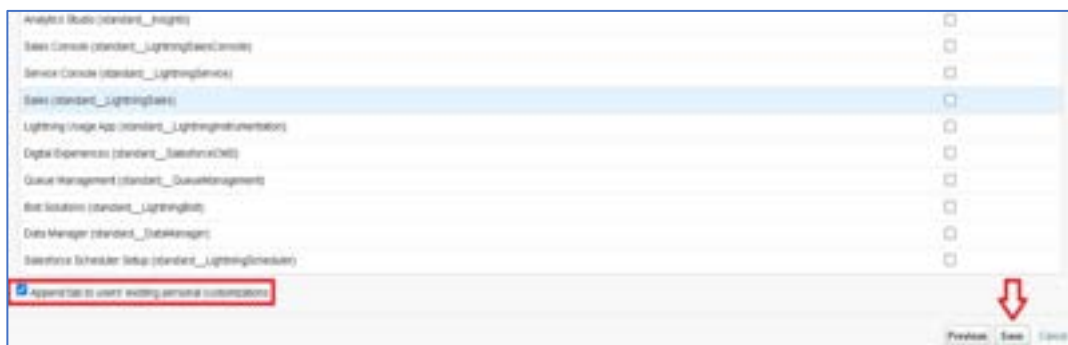


- Select Object (Billing details feedback) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab.

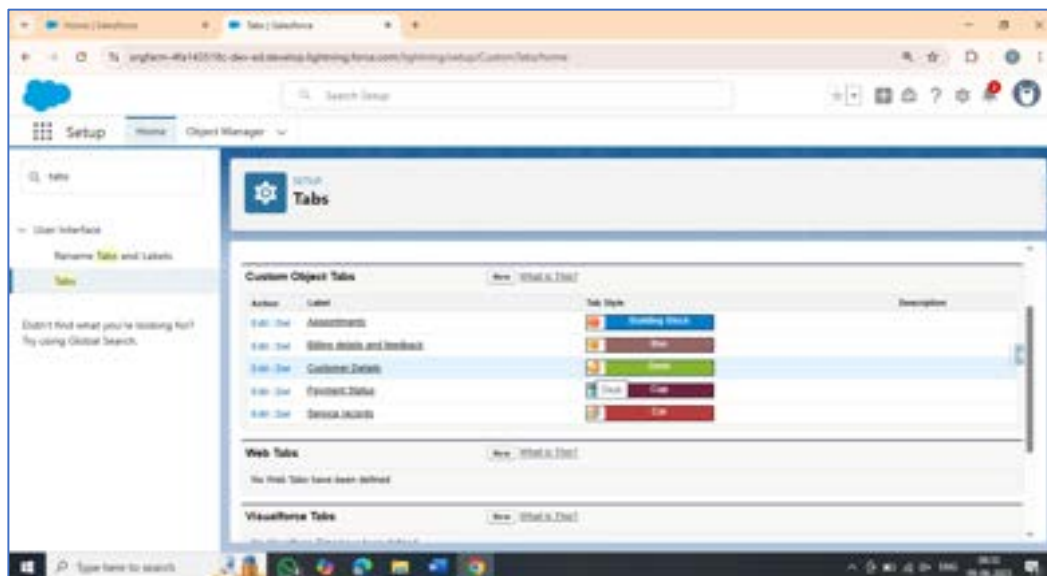
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- Make sure that the Append tab to users' existing personal customizations is checked.
- Click save.



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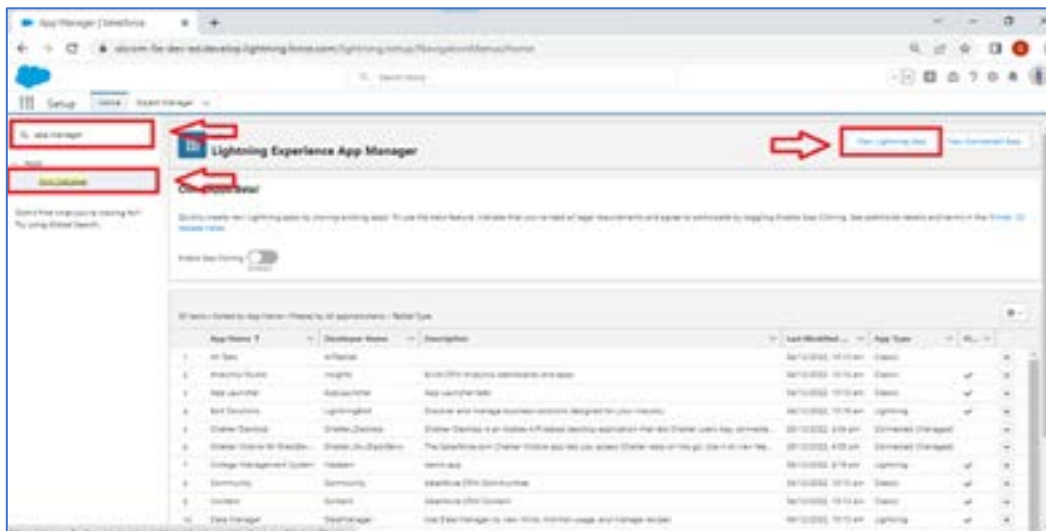
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MILESTONE – 4 THE LIGHTNING APP

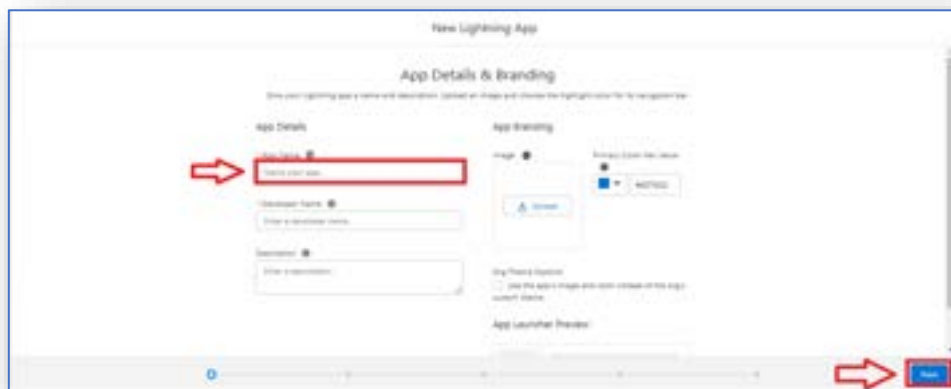
ACTIVITY – 1:- Create a Lightning App

➤ To create a lightning app page:

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



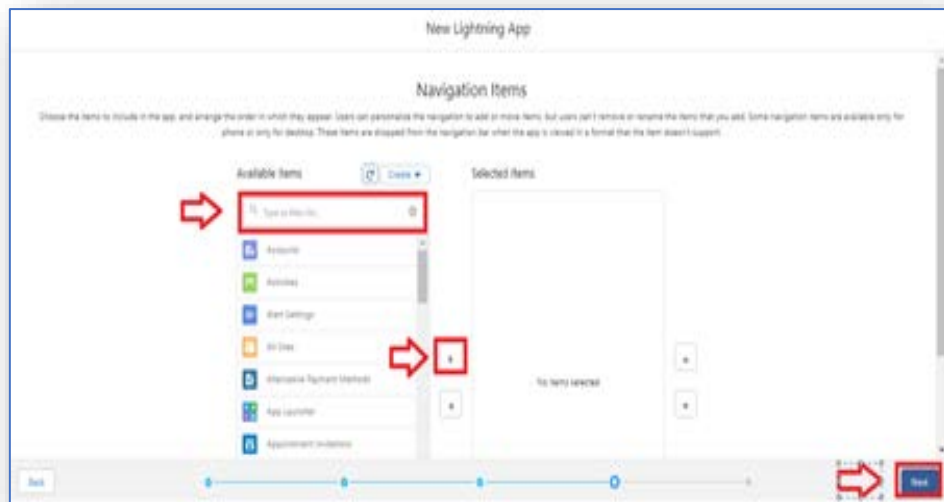
- Fill the app name in app details as Garage Management Application >> Next >> (App option page) keep it as default >> Next >> (Utility Items) keep it as default >> Next.



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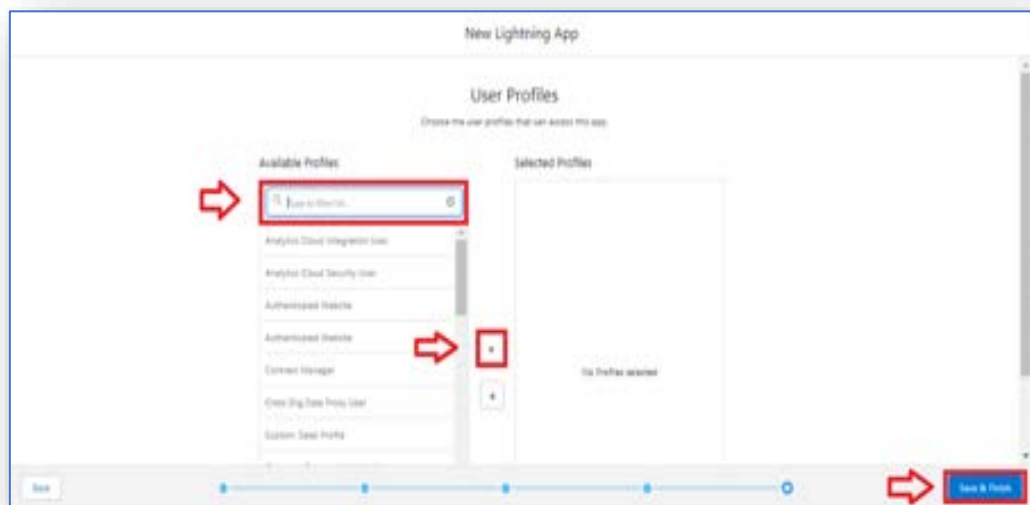
To Add Navigation Items:

- Select the items (Customer Details, Appointments, Service records, Billing details and feedback, Reports and Dashboards) from the search bar and move it using the arrow button >> Next



➤ To Add User Profiles:

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



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MILESTONE – 5

FIELDS

ACTIVITY -1 : Creation of fields for the Customer Details object

1. To create fields in an object:

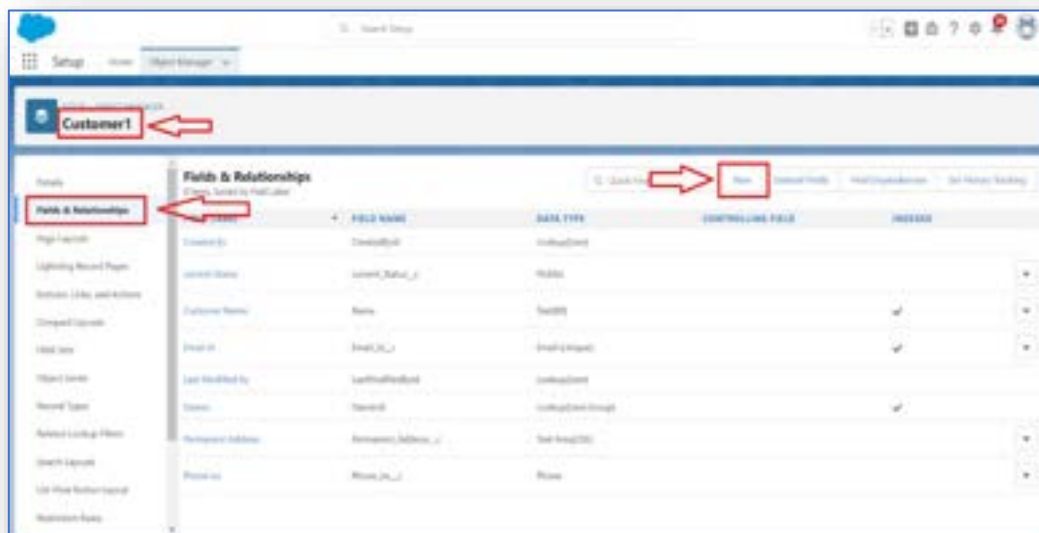
- Go to setup >> click on Object Manager >> type object name (Customer Details) in search bar >> click on the object.



The screenshot shows the Salesforce Object Manager interface. A table lists objects, with 'Customer Details' highlighted in red. The table has columns: LABEL, API NAME, TYPE, DESCRIPTION, LAST MODIFIED, and DEPLOYED.

LABEL	API NAME	TYPE	DESCRIPTION	LAST MODIFIED	DEPLOYED
Customer	Customer	Standard Object			
Customer Details	Customer_Details__c	Custom Object		10/10/2023	✓

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

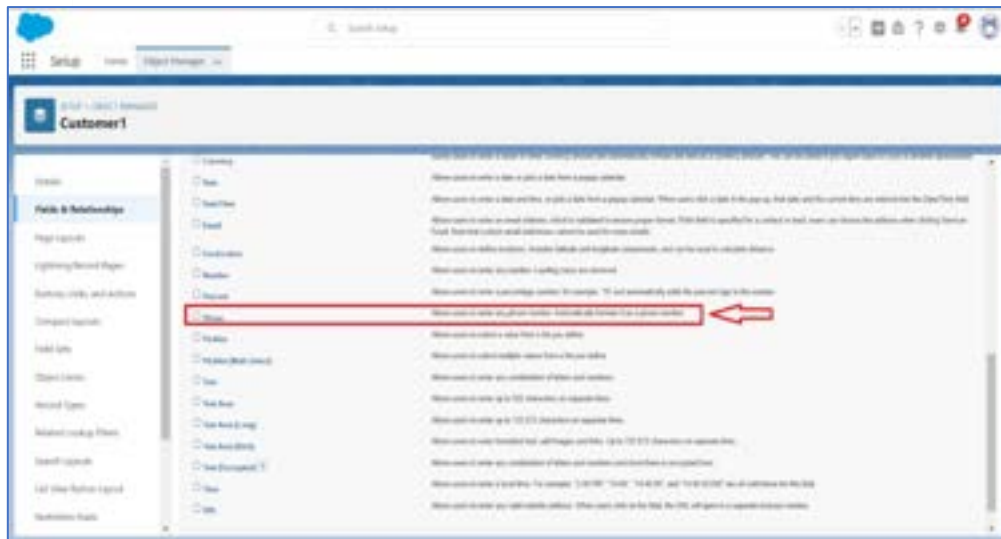


The screenshot shows the 'Fields & Relationships' page for the 'Customer1' object. The 'Fields & Relationships' tab is selected in the left sidebar. The 'New' button is highlighted in red. The table lists fields with columns: FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

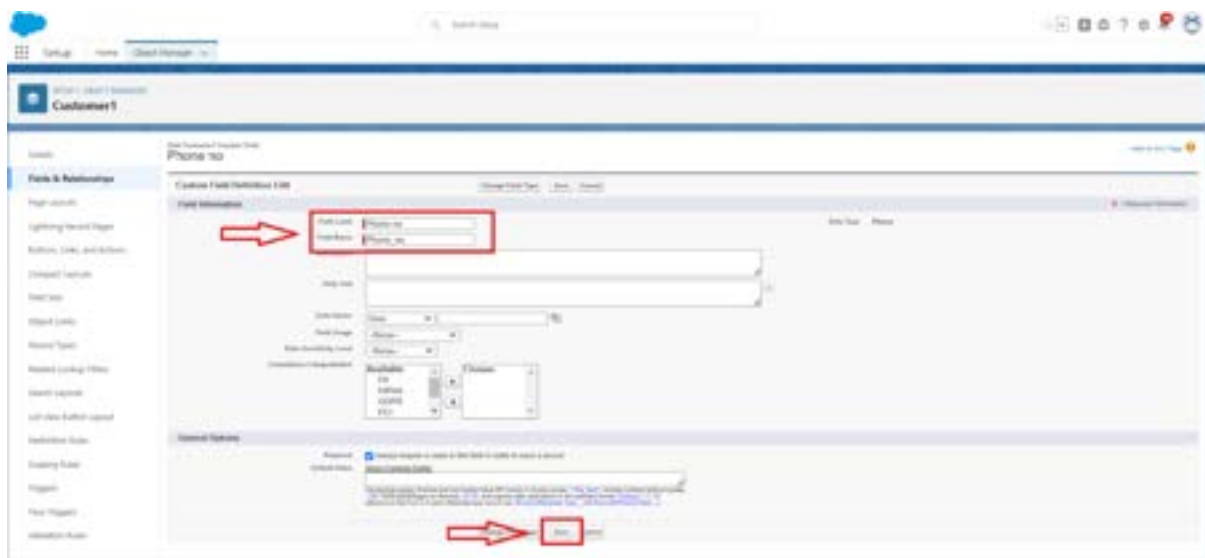
FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Customer ID	Lookup (ID)		
Current Status	Lookup (Status)		
Customer Name	Text		✓
Phone ID	Lookup (Phone)		✓
Last Modified By	Lookup (User)		
Status	Text		✓
Relationship Address	Text (Long)		
Phone ID	Phone		

- Select Data Type as a “Phone”

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- Click on next.
- Fill the Above as following:
 - Field Label: Phone number
 - Field Name : gets auto generated
 - Click on Next >> Next >> Save and new.



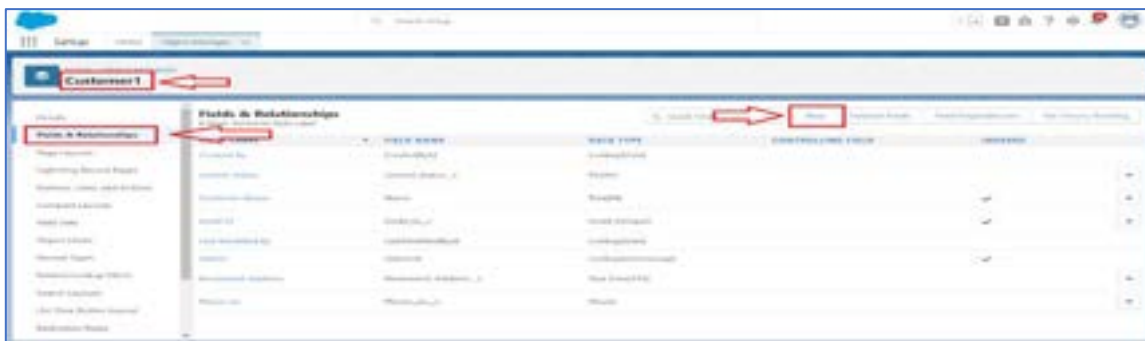
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2. To create other fields in an object:

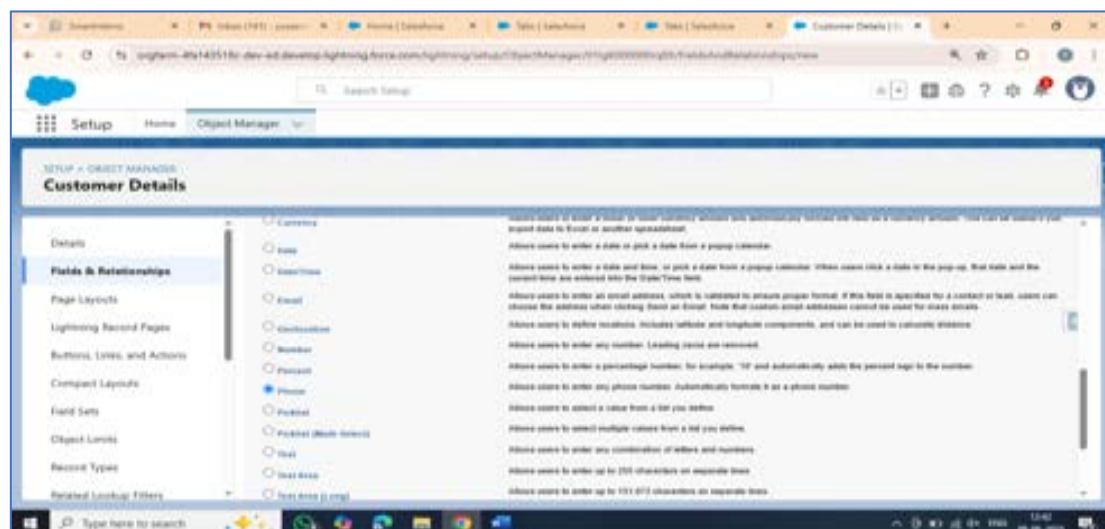
- Go to setup >> click on Object Manager >> type object name(Customer Details) in search bar >> click on the object.



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



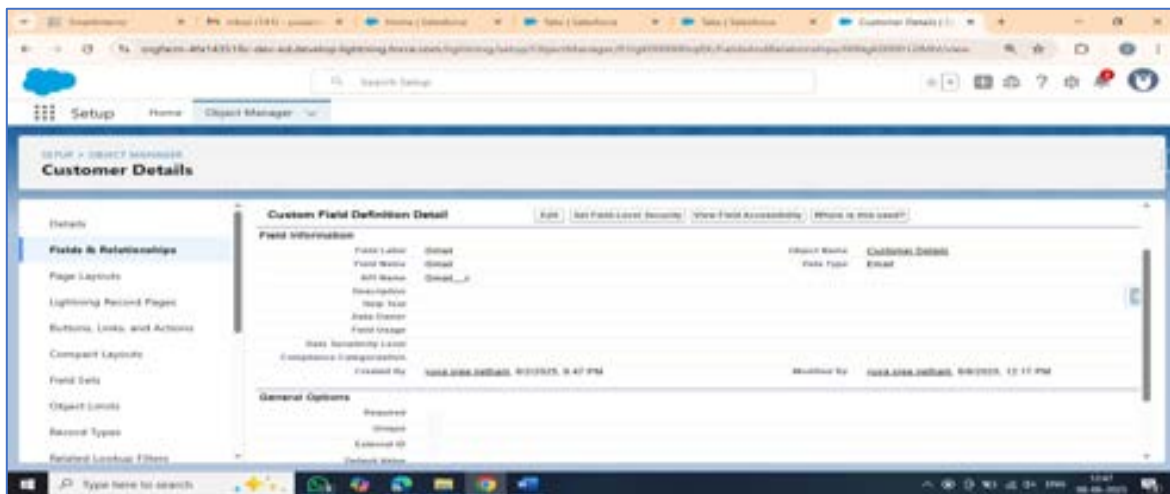
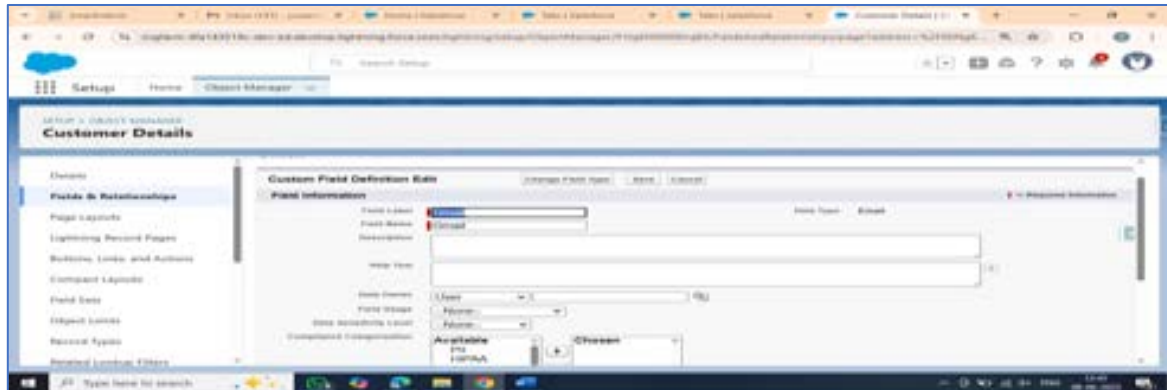
- Select Data Type as a "Email"



- Click Next
- Fill the Above as following:
- Field Label: Gmail

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



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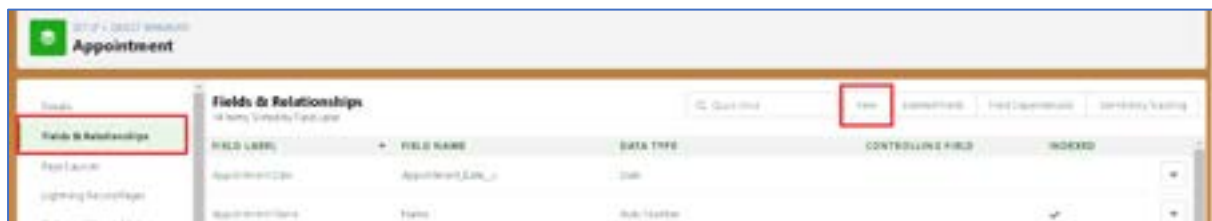
ACTIVITY – 2:- Creation of Lookup Fields

Creation of Lookup Field on Appointment Object:

- 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 "Look-up relationship" as data type and click Next.

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

Data Type

Select one of the data types below.

- ☐ None Selected
- ☐ Auto Number
- ☐ Formula
- ☐ Roll-Up Summary
- ☒ Look-up Relationship
- ☐ Master-Detail 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.

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

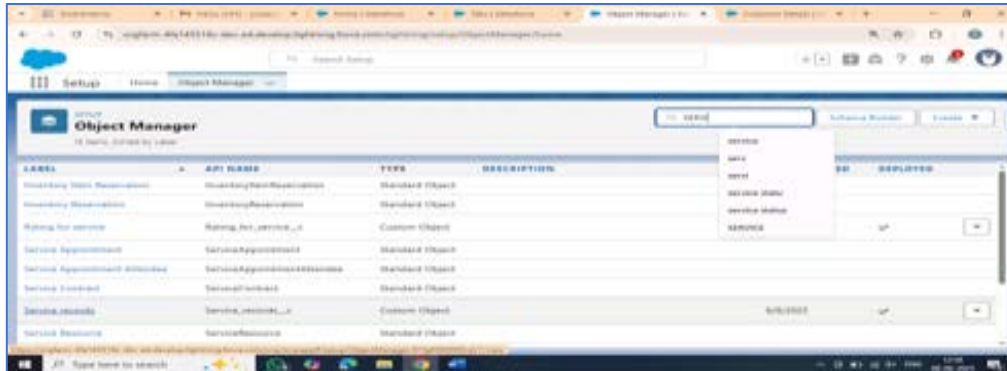
- The relationship field is required on all detail records.
- The ownership and division of a detail record are determined by the master record.

- Select the related object "Customer Details" and click next.
- Next >> Next >> Save

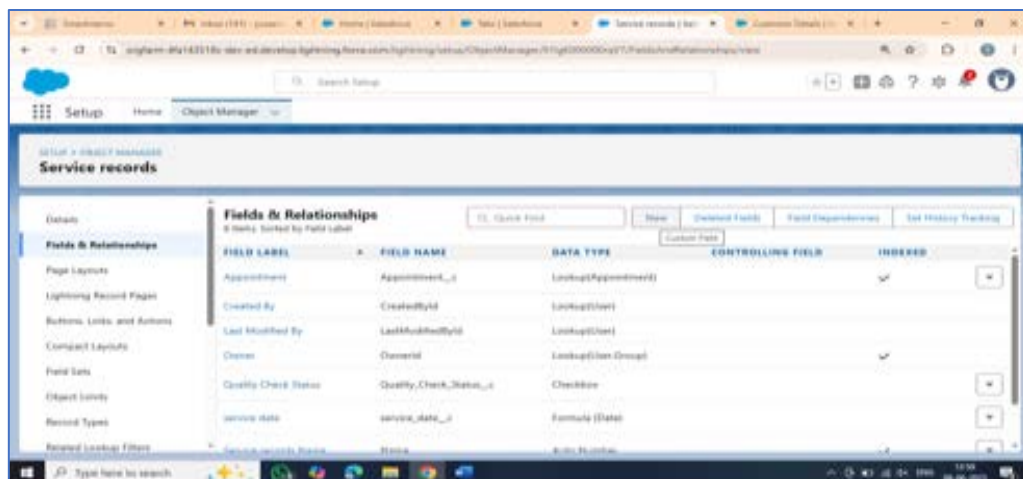
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➤ Creation of Lookup Field on Service records Object:

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

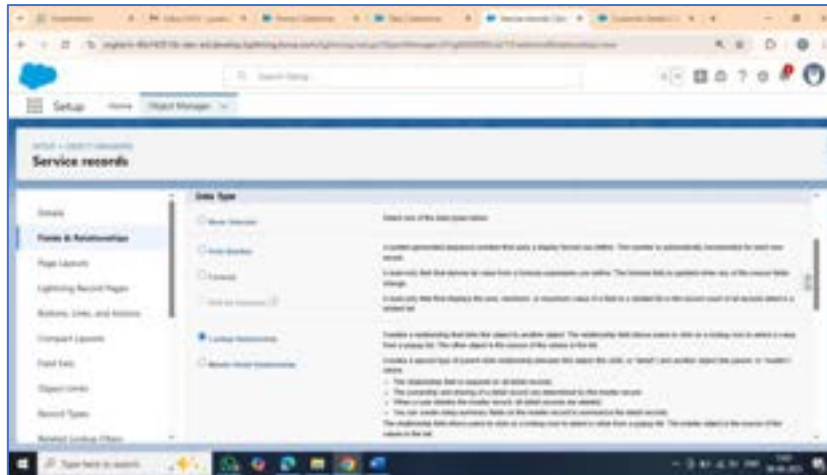


- Now click on "Fields & Relationships" >> New



- Select "Look-up relationship" as data type and click Next.

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- Select the related object "Appointment" and click next.



- Make it a required field so click on Required.



- Scroll down for Lookup Filter and click on Show filter settings.
- Now add the filter criteria.
- Field: Appointment: Appointment Date >> Operator: less than >> select field >> Appointment: Created Date
- Filter type should be Required.
- Error Message: Value does not match the criteria.
- Enable the filter by click on Active.
- Next >> Next >> Save.

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Creation of Lookup Field on Billing details and feedback Object:

- Go to setup >> click on Object Manager >> type object name (Billing details and feedback) in search bar >> click on the object.



- Now click on "Fields & Relationships" >> New.
- Select "Look-up relationship" as data type and click Next.



- Select the related object "Service records" and click next.
- Next >> Next >> Save & new.

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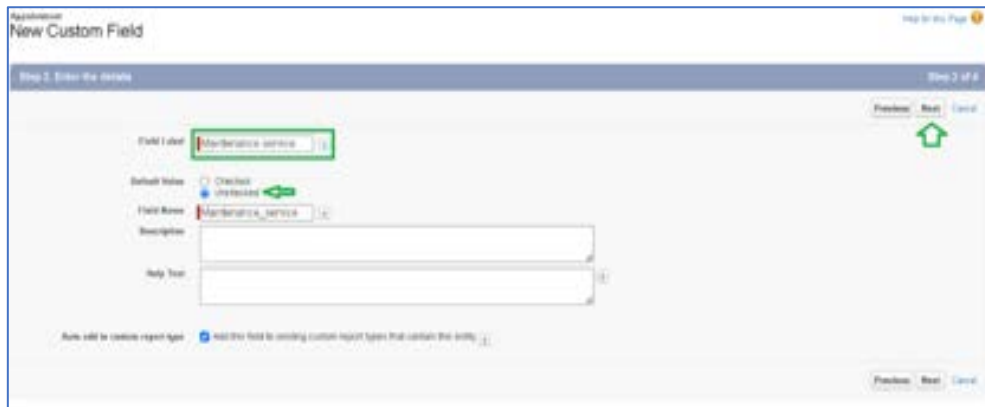
ACTIVITY -3 : Creation of Checkbox Fields

Creation of Checkbox Field on Appointment Object:

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



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

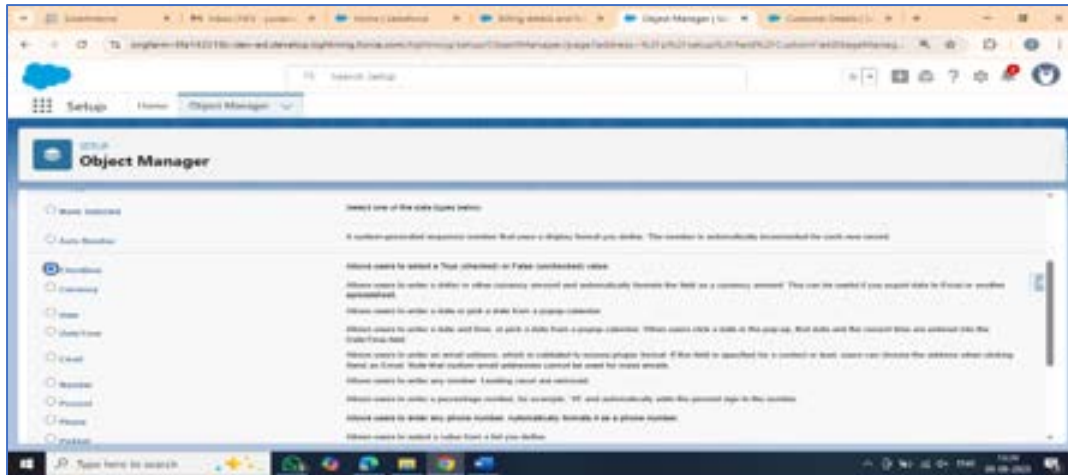


- Click on next >> next >> save.

Creation of Another Checkbox Field on Appointment Object :

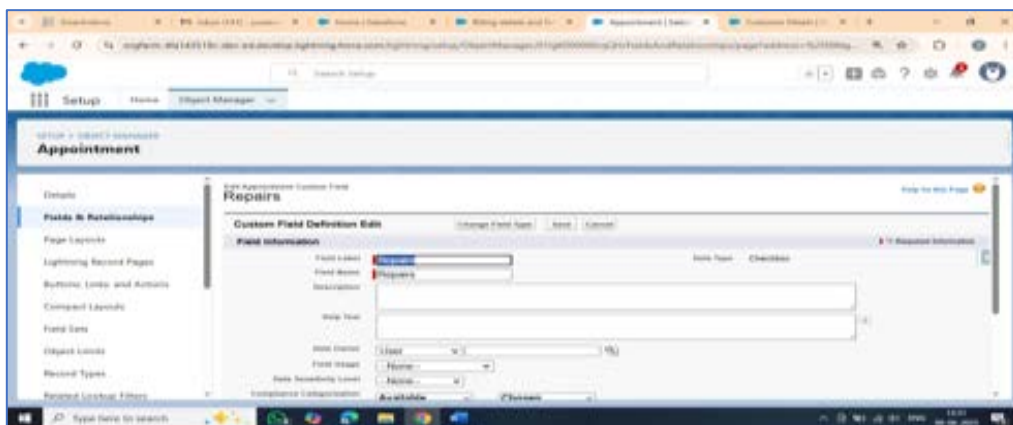
- Go to setup >> click on Object Manager >> type object name (Appointment) in search bar >> click on the object.
- Now click on "Fields & Relationships" >> New.
- Select "Check box" as data type and click Next.

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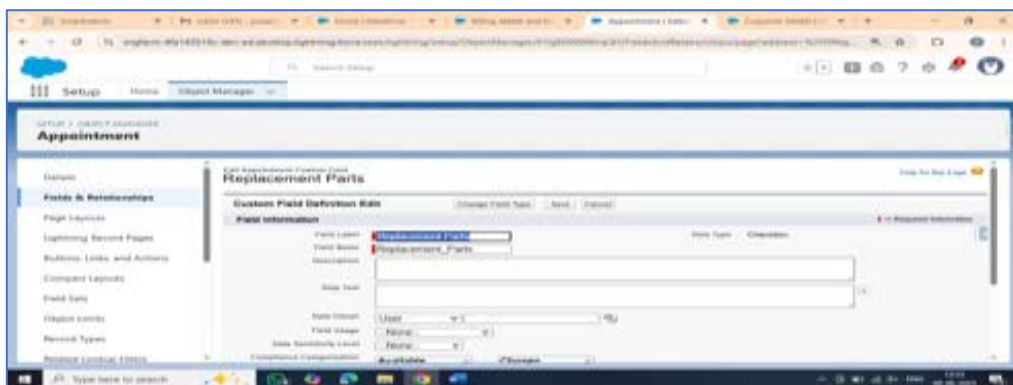


=

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



- Click on next >> next >> save.
- Follow the same and create another checkbox with given names
- Give the Field Label : Replacement Parts
- Field Name: is auto populated

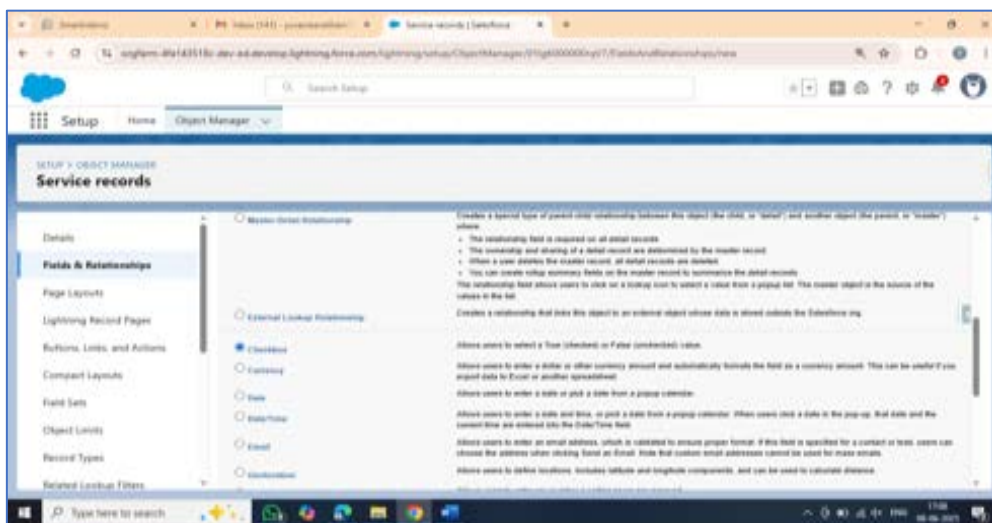


GARAGE MANAGEMENT SYSTEM

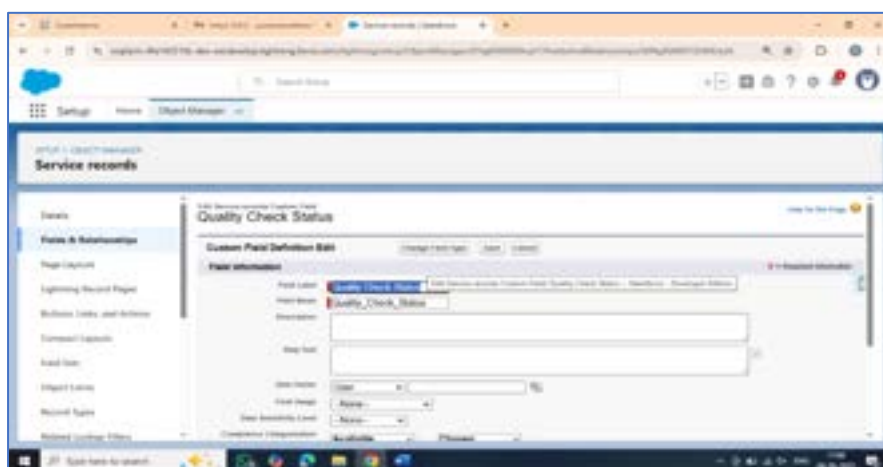
- Default value: unchecked
- Click on next >> next >> save.

Creation of Checkbox Field on Service records Object :

- Go to setup >> click on Object Manager >> type object name(Service records) in search bar >> click on the object.
- Now click on "Fields & Relationships" >> New.
- Select "Check box" as data type and click Next.



- Give the Field Label: Quality Check Status
- Field Name : is auto populated
- Default value : uncheck

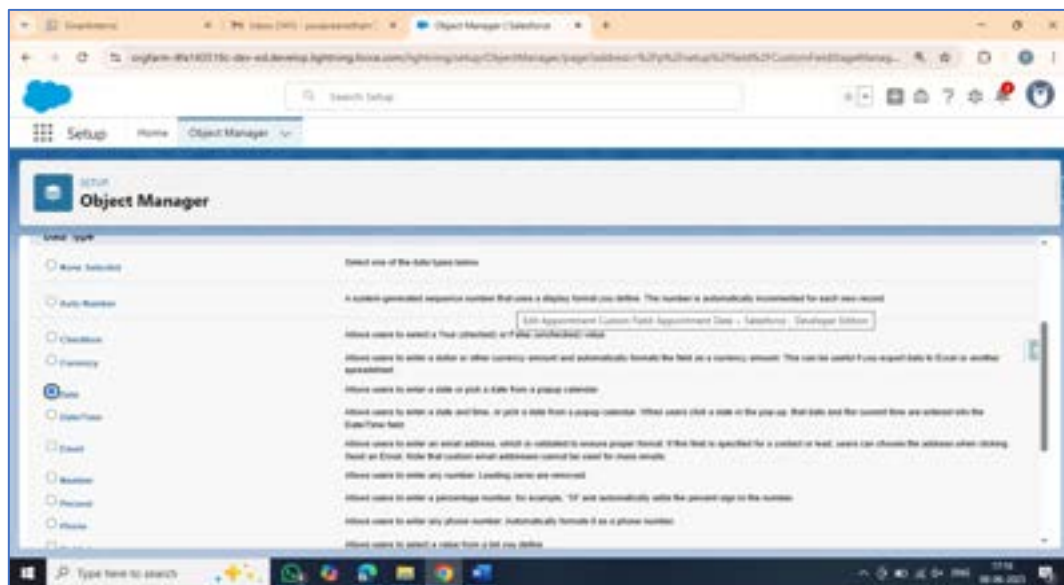


- Click on next >> next >> save.

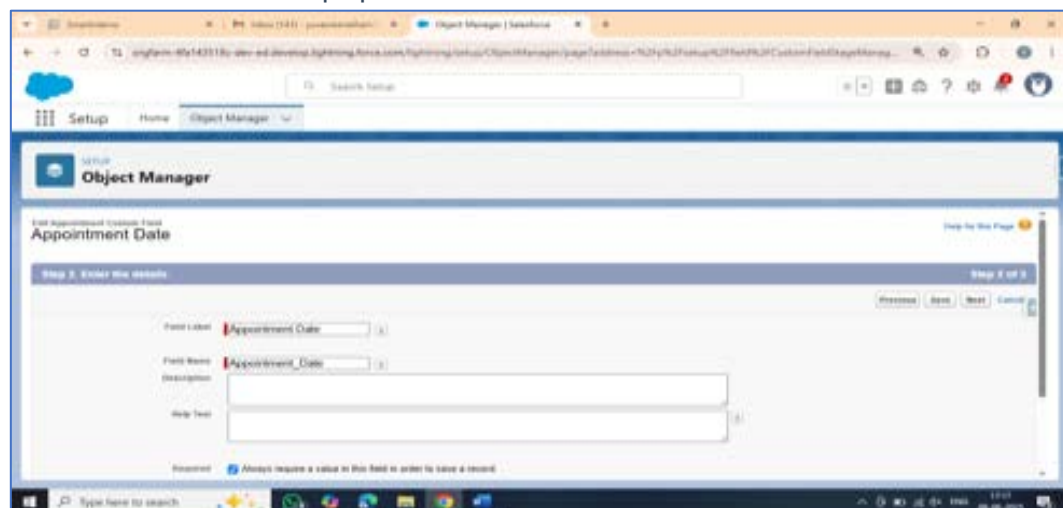
ACTIVITY – 4 : Creation of date Fields

Creation of Date Field on Appointment Object:

- 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 “Date” as data type and click Next.



- Give the Field Label: Appointment Date
- Field Name : is auto populated



- Make it as a Required field by click on the Required option.
- Click on next >> next >> save.

ACTIVITY – 5 :- Creation of Currency Fields

Creation of Currency Field on Appointment Object :

- 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 “Currency” as data type and click Next.
- Give the Field Label : Service Amount
- Field Name : is auto populated

Step 2: Enter the details

Field Label: Service Amount

Field Name: Service_Amount

Length: 10

Number of decimal places: 2

Description: Service Amount

Help Text: Service Amount

Required: ☒ Always requires a value in this field or else it is invalid

Field Level Security: ☒ All profiles that are creating custom report types that contain this entity

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

Step 3: Extend field level security

Field Label: Service Amount

Data Type: Currency

Field Name: Service_Amount

Description: Service Amount

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 select to field level security.

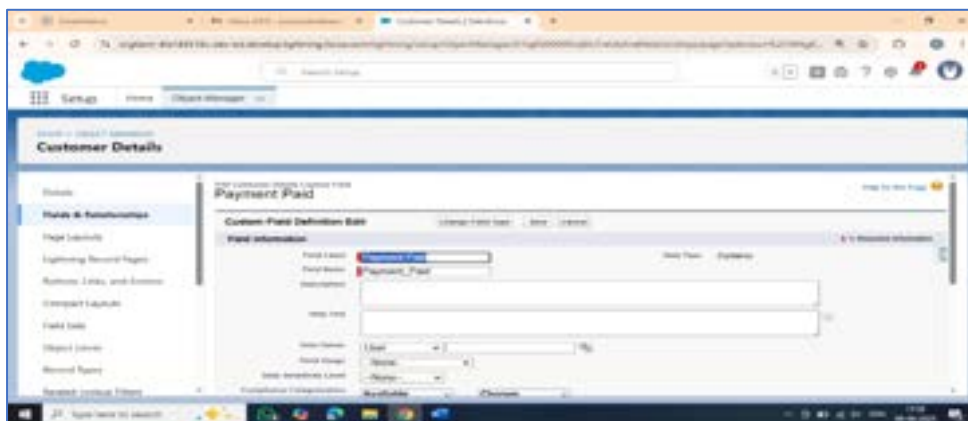
Field Level Security for Profiles	Visible	Read Only
Analytics Cloud Integration User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Analytics Cloud Security User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Authenticated Website	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Contract Manager	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Custom Org Data Entry User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

- Click on next >> save.

GARAGE MANAGEMENT SYSTEM

Creation of Currency Field on Billing details and feedback Object :

- 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.
- Change the label name as mentioned.
- Give the Field Label : Payment Paid
- Field name : is auto populated



ACTIVITY – 6 :- 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

Step 3: Enter the details

Field Label:

Length:

Field Name:

Description:

Required: ☒ (checked)

Unique: ☒ (checked)

Indexed: ☐ (unchecked)

Next

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

Creation of Text Fields in Billing details and feedback object :

- Go to setup >> click on Object Manager >> type object name(Billing details and feedback) in search bar >> click on the object.
- Now click on "Fields & Relationships" >> New.
- Select "text" as data type and click Next.
- Give the Field Label : Rating for service
- Field Name : is auto populated
- Length : 1
- Make field as Required.

GARAGE MANAGEMENT SYSTEM

The screenshot shows the Salesforce Lightning Setup interface. The left sidebar contains navigation links: Details, Fields & Relationships (selected), Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Set, Object Limits, Record Types, and Related Lookup Filters. The main content area is titled 'Billing details and feedback' and 'New Custom Field'. It shows 'Step 2: Enter the details' of a custom field configuration. The field label is 'Rating for service'. The display format is 'A.0000'. The field name is 'Rating_for_service'. A warning message states: 'This Field Name is an internal reference and is used for integration purposes such as custom lists, custom o-objects, and the API. Be careful when changing the Field Name as it may affect existing integrations.' The bottom of the page has a navigation bar with 'Previous', 'Next', and 'Save' buttons.

- Click on next >> next >> save

ACTIVITY – 7 :- Creation of Picklist Fields

Creation of Picklist Fields in Service records object :

- Go to setup >> click on Object Manager >> type object name(Service records) in search bar >> click on the object.
- Click on fields & relationship >> click on New.
- Select Data type as "Picklist" and click Next.
- 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.
- The values are: Started, Completed.

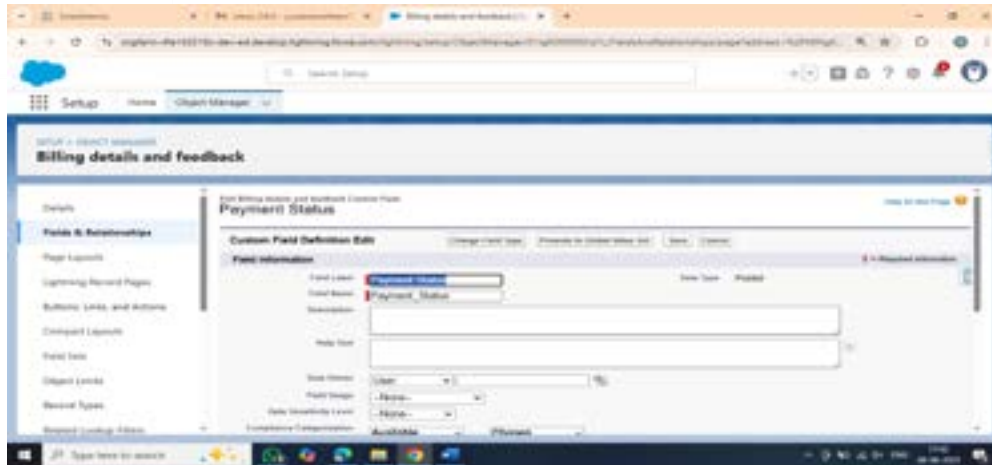


- Click Next.
- Next >> Next >> Save.

Creation of Picklist Fields in Billing details and feedback object :

- Go to setup >> click on Object Manager >> type object name(Billing details and feedback) in search bar >> click on the object.
- Click on fields & relationship >> click on New.
- Select Data type as "Picklist" and click Next.
- 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.
- The values are: Pending, Completed.

GARAGE MANAGEMENT SYSTEM



- Click Next.
- Next >> Next >> Save.

GARAGE MANAGEMENT SYSTEM

ACTIVITY – 8 :- Creating Formula Field in Service records Object

- Go to setup >> click on Object Manager >> type object name(Service records) in search bar >> click on the object.
- Click on fields & relationship >> click on New.
- Select Data type as “Formula” and click Next.
- 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: service date

Field Name: service_date

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

Formula Return Type

☒ Date

Select one of the data types below:

- ☐ Boolean: Calculate a boolean value. Example: `ISBLANK()` > `ISBLANK`
- ☐ Currency: Calculate a dollar or other currency amount and automatically format the field as a currency amount. Example: `Grand Total * Amount` > `Cost`
- ☐ Date: Calculate a date. For example, by adding or subtracting days to other dates. Example: `Reminder Date + 7` > `Days`
- ☐ Date/Time: Calculate a datetime. For example, by adding a number of hours or days to another datetime. Example: `Next * 24` > `Hours`

Buttons: Previous, Next, Cancel

- Insert field formula should be : Created Date

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:

Created Date

Type: DateTime

API Name: CreatedDate

Buttons: Insert, Close

MILESTONE – 6

Validation rule

ACTIVITY -1 :- To create a validation rule to an Appointment Object

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



- Enter the Rule name as " Vehicle ".
- Insert the Error Condition Formula as : -
NOT(REGEX(Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))



- 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.



GARAGE MANAGEMENT SYSTEM

ACTIVITY -2:- To create a validation rule to an Billing details and feedback Object

- Go to the setup page >> click on object manager >> From drop down click edit for Billing details and feedback object.
- Click on the validation rule >> click New.
- Enter the Rule name as " rating_should_be_less_than_5".
- Insert the Error Condition Formula as : -
- NOT(REGEX(Rating_for_service__c , "[1-5]{1}"))

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

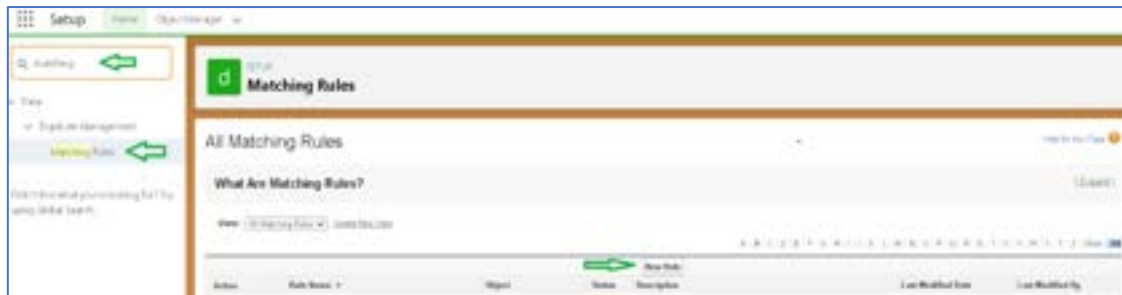
GARAGE MANAGEMENT SYSTEM

MILESTONE- 7

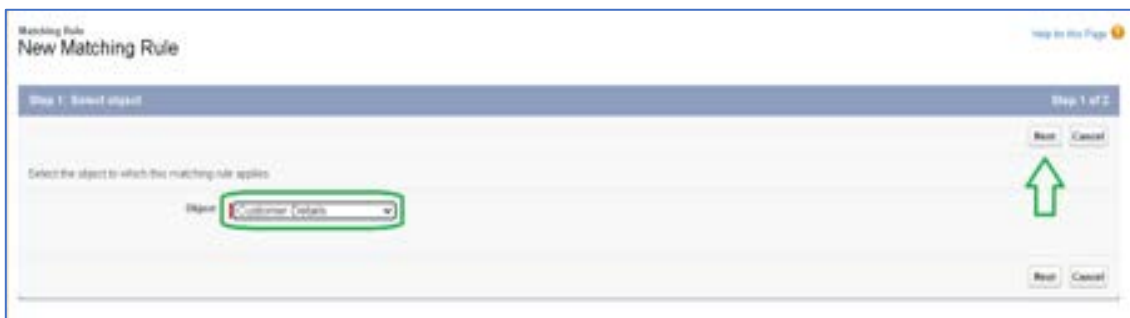
Duplicate rule

ACTIVITY – 1:- To create a matching rule to an Customer details Object

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



- Select the object as Customer details and click Next.



- Give the Rule name : Matching customer details
- Unique name : is auto populated
- Define the matching criteria as

- | Field | Matching Method |
|-----------------|-----------------|
| 1. Gmail | Exact |
| 2. Phone Number | Exact |

- Click save.
- After Saving Click on Activate.

GARAGE MANAGEMENT SYSTEM

ACTIVITY – 2:- To create a Duplicate rule to an Customer details

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

- Give the Rule name as : Customer Detail duplicate
- Scroll a little in Matching rule section

GARAGE MANAGEMENT SYSTEM

The screenshot shows the 'Duplicate Rule Edit' window for a rule named 'Customer Detail duplicate'. The window has a title bar with 'Edit Duplicate Rule' and 'Customer Detail duplicate'. Below the title bar are buttons for 'Save', 'Save & New', and 'Cancel'. The main content area is divided into two sections: 'Rule Details' and 'Actions'.

Rule Details:

- Rule Name:** 'Customer Detail duplicate' (highlighted with a green arrow).
- Description:** (empty text box).
- Object:** 'Customer Details'.
- Record Level Security:** Radio buttons for 'Enforce sharing rules' (selected) and 'Bypass sharing rules'.

Actions:

Specify what happens when a user tries to save a duplicate record.

- Action On Create:** 'Allow' (selected), 'Alert' (checked), 'Report' (unchecked).
- Action On Edit:** 'Allow' (selected), 'Alert' (unchecked), 'Report' (unchecked).
- Alert Text:** 'Are you sure you want to save this record?' (text box).

- Select the matching rule : Matching customer details
- And Click on save.
- After saving the Duplicate Rule, Click on Activate.

The screenshot shows the 'Matching Rules' window. The title bar says 'Matching Rules'. Below the title bar is a subtitle: 'Define how duplicate records are identified.'.

Compare Customer Details With: 'Customer Details' (dropdown menu).

Matching Rule: 'Matching Customer details' (dropdown menu, highlighted with a green arrow).

Matching Criteria: '(Customer: Details: ResID Exact Match) OR (FALSD) AND (Customer: Details: Phone Number Exact Match) OR (FALSD)'. Below this is a green checkmark and the text 'Matching Selected'.

Field Mapping: (empty text box).

Buttons: 'Add Rule', 'Remove Rule'.

Conditions:

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

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

Buttons: 'Add Filter Logic', 'Save', 'Save & New', 'Cancel'.

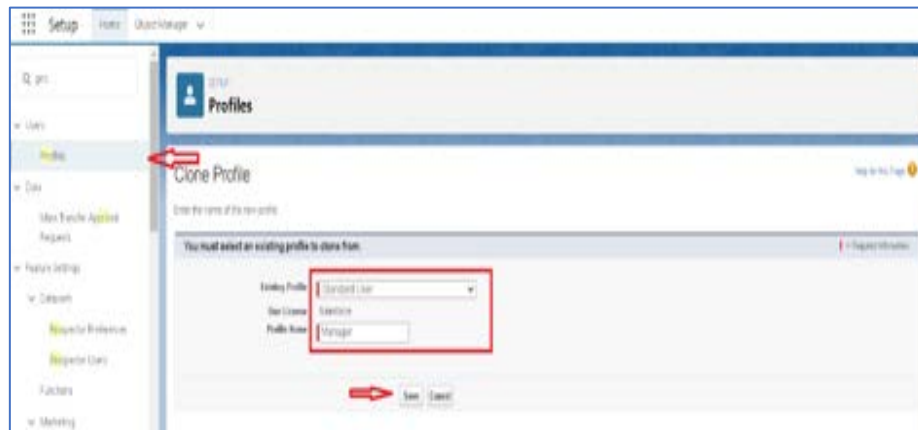
GARAGE MANAGEMENT SYSTEM

MILESTONE – 8

Profiles

ACTIVITY – 1 :- Manager Profile create a new profile:

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



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



- 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.

GARAGE MANAGEMENT SYSTEM

Custom Object Permissions						
	Quick 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"/>

Custom Object Permissions						
	Quick 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"/>
ServiceData	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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

ACTIVITY – 2: 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 And click save.
- objects as mentioned in the below diagram.

Custom Object Permissions						
	Quick 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"/>

Custom Object Permissions						
	Quick 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"/>
ServiceData	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

- And click save.

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MILESTONE – 9 Role & Role Hierarchy

ACTIVITY – 1:- Creating Manager Role

Creating Manager Role:

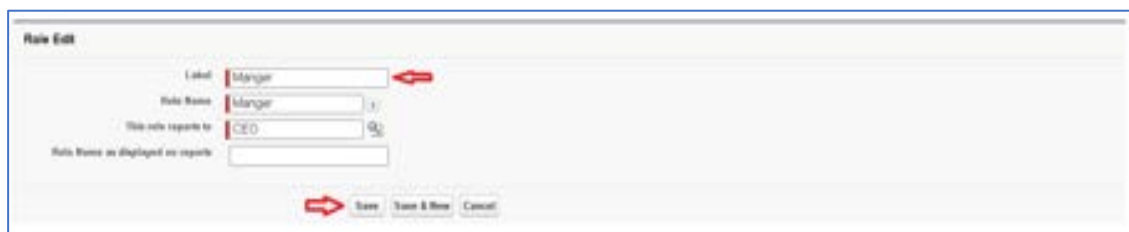
- Go to quick find >> Search for Roles >> click on set up roles.



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



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

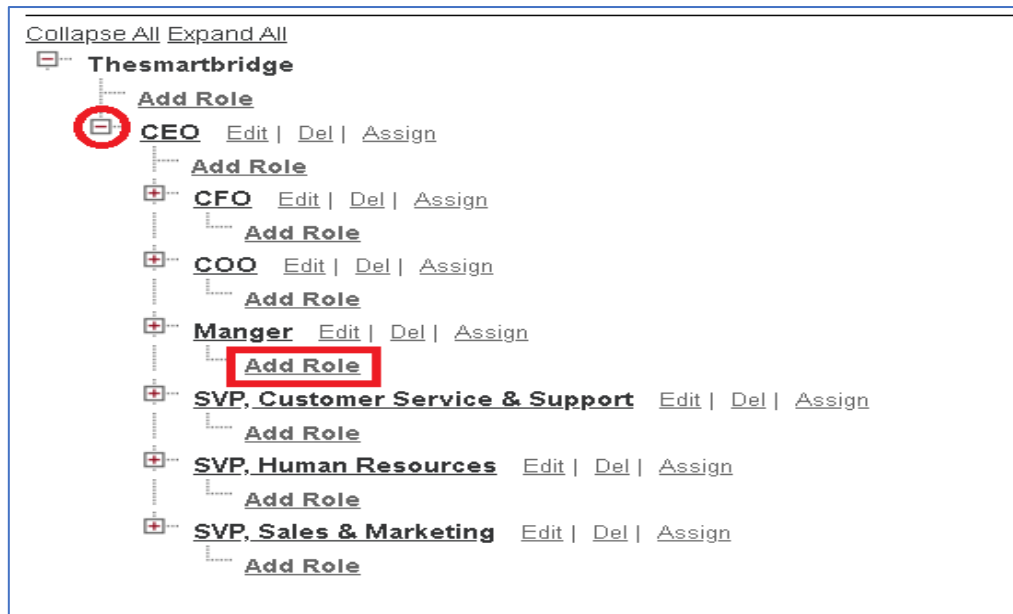


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ACTIVITY – 2:- Creating another roles

Creating another two roles under manager

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



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

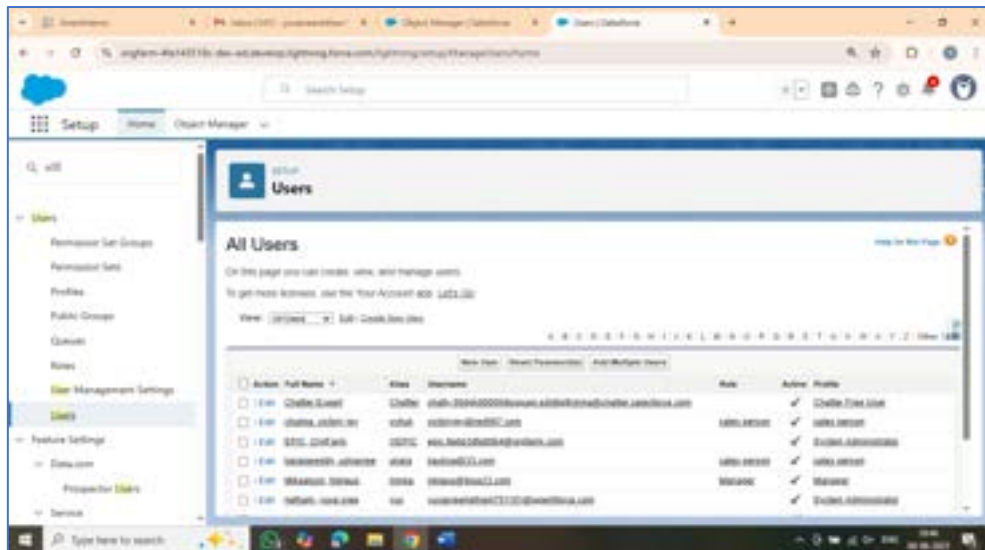
GARAGE MANAGEMENT SYSTEM

MILESTONE – 10

Users

ACTIVITY – 1:- Create User

- Go to setup >> type users in quick find box >> select users >> click New user.



- Fill in the fields
 - First Name : Niklaus
 - Last Name : Mikaelson
 - Alias : Give a Alias Name
 - Email id : Give your Personal Email id
 - Username : Username should be in this form: text@text.text
 - Nick Name : Give a Nickname
 - Role : Manager
 - User licence : Salesforce
 - Profiles : Manager.

New User

Help for this Page

User Edit Save Save & New Cancel

General Information

First Name:
 Last Name:
 Alias:
 Email:
 Username:
 Password:
 Title:
 Company:
 Department:
 Division:

Required Information

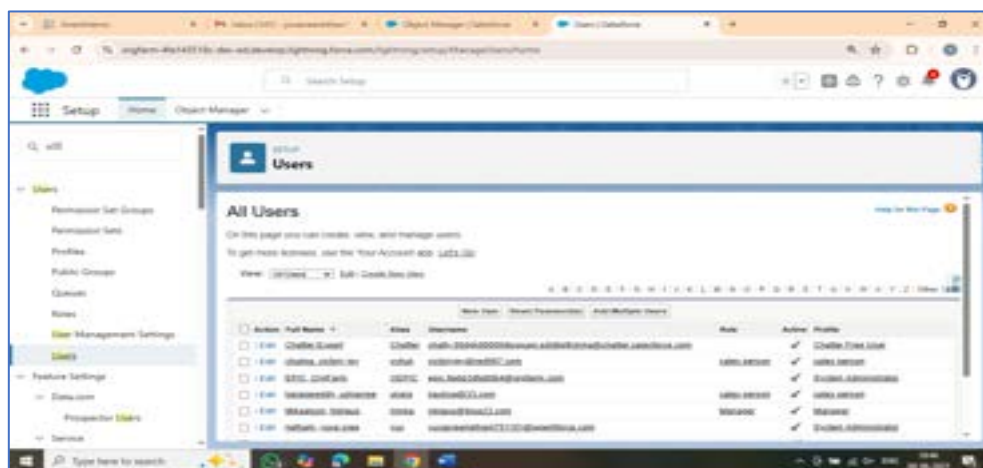
Role:
 User License:
 Profile:
 Active: ☒

Marketing User: ☐
 Office User: ☐
 Knowledge User: ☐
 Demo User: ☐
 Service Cloud User: ☐
 Site.com Contributor User: ☐
 Site.com Publisher User: ☐
 B2C User: ☐
 B2C.com User Type:

- *Save.*

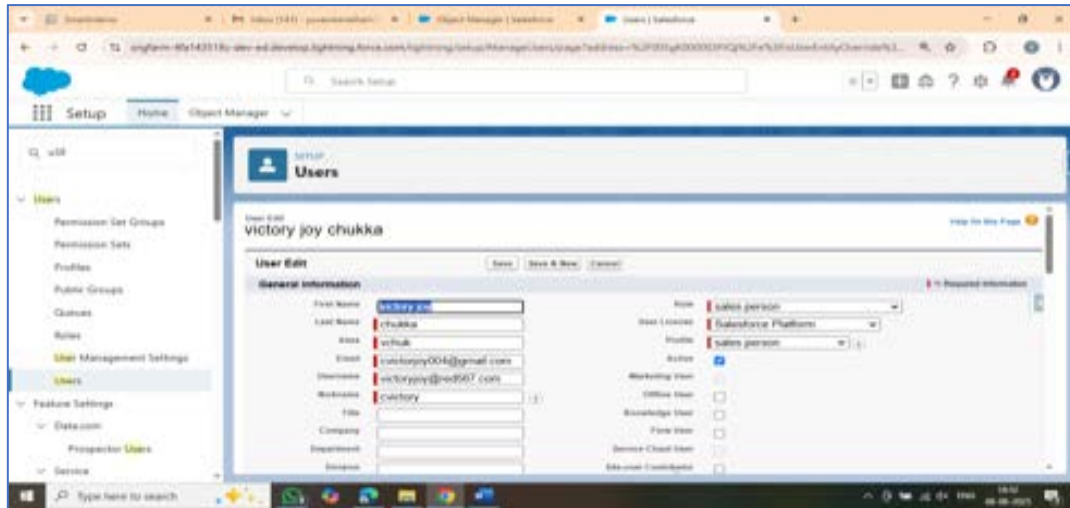
ACTIVITY – 2 :- creating another users

- Go to setup >> type users in quick find box >> select users >> click New user.



- Fill in the fields
 - First Name : victory joy
 - Last Name : chukka
 - Alias : vchuk
 - Email id : victoryjoy@gmail.com
 - Username : Username should be in this form: text@text.text
 - Nick Name : joy
 - Role : sales person
 - User licence : Salesforce Platform
 - Profiles : sales person

GARAGE MANAGEMENT SYSTEM



- Save.

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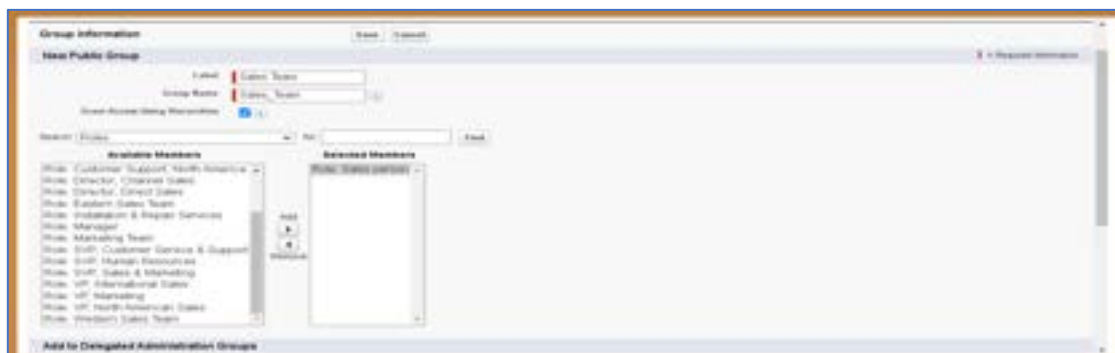
Milestone - 11 Public Groups

ACTIVITY – 1:- Creating New Public Group

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



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

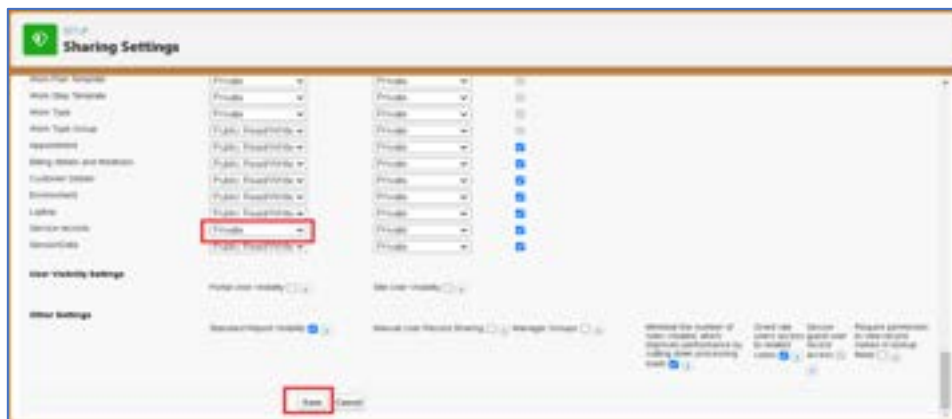


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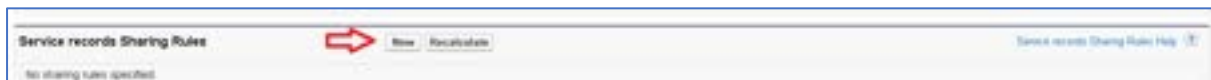
Milestone – 12 Sharing Settings

ACTIVITY – 1:- Creating Sharing settings

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



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



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

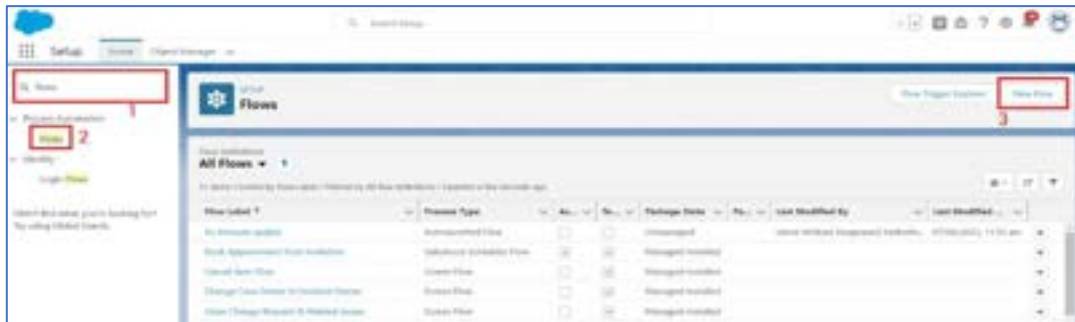


GARAGE MANAGEMENT SYSTEM

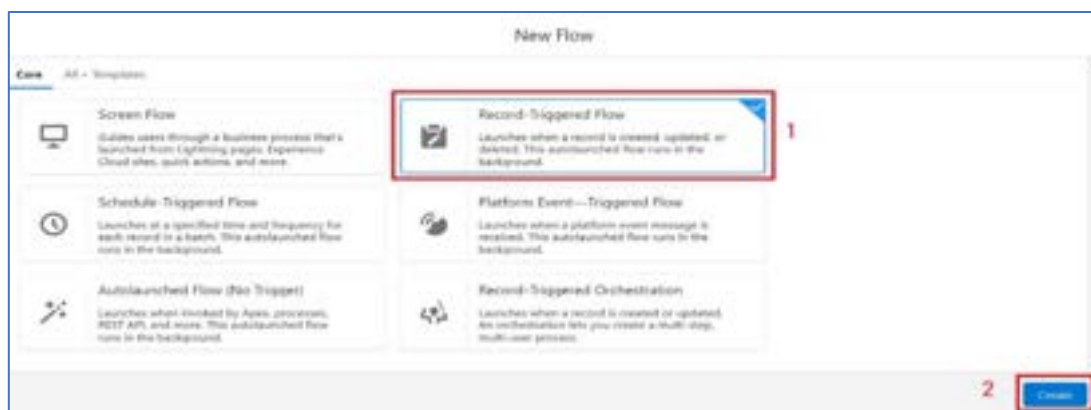
Milestone – 13 Fields

ACTIVITY – 1:- Create a Flow

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



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



- Select the Object as "Billing details and feedback" in the Drop down list.
- Select the Trigger Flow when: "A record is Created or Updated".



Select the Optimize the flow for: "Actions and Related Records" and Click on Done.

GARAGE MANAGEMENT SYSTEM

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

Name

***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.

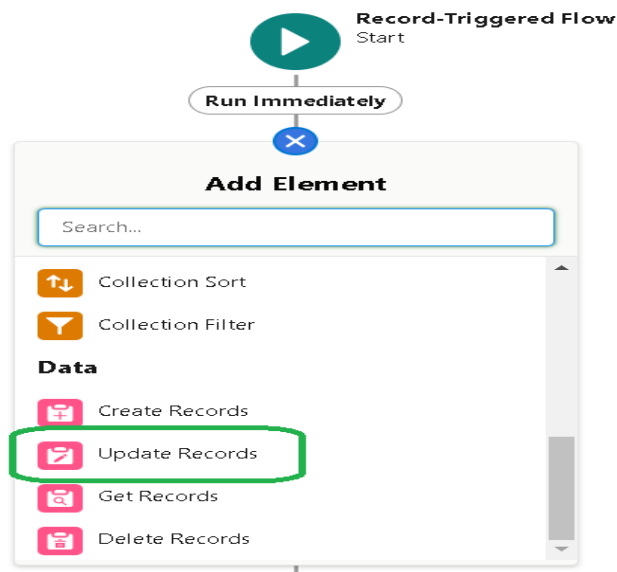
Actions and Related Records

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**

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



GARAGE MANAGEMENT SYSTEM

Give the Label Name : Amount Update

- Api name : is auto populated

Edit Update Records

Update Salesforce records using values from the Flow.

* Label: Amount Update * Api Name: Amount_Update

Description:

How to Find Records to Update and Set Their Values

- ☒ Use the billing details and feedback record that triggered the flow.
- ☐ Update records related to the billing details and feedback record that triggered the flow.
- ☐ Use the IDs and all field values from a record or record collection.
- ☐ Specify conditions to identify records, and set fields individually.

Set Filter Conditions

Condition Requirements to Update Record

All Conditions Are Met (AND)

Cancel Done

Set Filter Conditions

Condition Requirements to Update Record

All Conditions Are Met (AND)

Field: Payment_Status__c Operator: Equals Value: Completed

+ Add Condition

Set Field Values for the Billing details and feedback Record

Field: Payment_Paid__c Value: {\$Record.Service_records__r.Appointment__r.Service_Amount__c}

+ Add Field

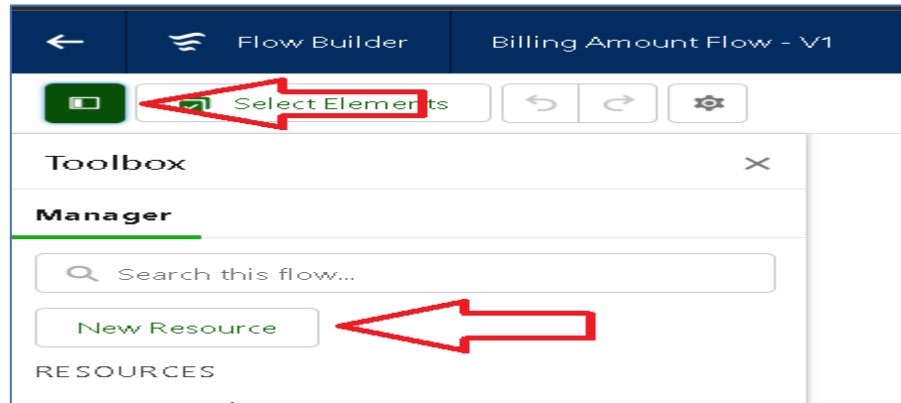
Cancel Done

Set a filter condition : All Conditions are met(AND)

- Field : Payment_Status__c
- Operator : Equals
- Value : Completed
- And Set Field Values for the Billing details and feedback Record
- Field : Payment_Paid__c
- Value : {\$Record.Service_records__r.Appointment__r.Service_Amount__c}

GARAGE MANAGEMENT SYSTEM

- Click On Done.
- Before creating another Element. Create a New Resource form Toolbox form top left.



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

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

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

Amount paid : {!\$Record.Payment_Paid__c}

Thank you for Coming .

- Click done.

GARAGE MANAGEMENT SYSTEM

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

GARAGE MANAGEMENT SYSTEM

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



ACTIVITY – 2 :- Create another Flow

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

Setup

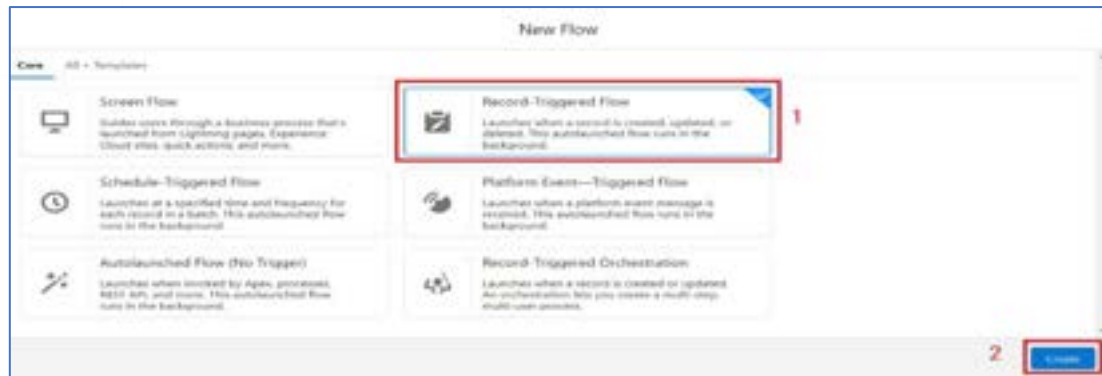
Flows

New Flow

Flow Label	Process Type	Active	Is On	Package Name	Package	Last Modified By	Last Modified
Rs Amount update	Automated Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed		Shree Venkatesh Sangamesh Reddy	07/08/2021 11:25 am
Book Appointment from Invitation	Gateway Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed installed			
Special Rate Flow	Event Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed installed			
Change Case Closed to Accident Report	Event Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed installed			
When Change Request is Refused Issue	Event Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed installed			

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

GARAGE MANAGEMENT SYSTEM



- Select the Object as "Service records" in the Drop down list.
- Select the Trigger Flow when: "A record is Created or Updated".
- Select the Optimise the flow for: "Actions and Related Records" and Click on Done.
- Under the Record-triggered Flow Click on "+" Symbol and In the Drop down List select the "Update records Element".
- Set a filter condition : All Conditions are met(AND)
- Field : Quality_Check_Status__c
- Operator : Equals
- Value : True
- And Set Field Values for the Billing details and feedback Record
- Field : Service_Status__c
- Value : Completed

GARAGE MANAGEMENT SYSTEM

The screenshot shows a configuration interface for a service record update. It is divided into two main sections. The top section, 'Set Filter Conditions', includes a dropdown for 'Condition Requirements to Update Record' set to 'All Conditions Are Met (AND)'. Below this is a row of three fields: 'Field' with the value 'Quality_Check_Status__c', 'Operator' with the value 'Equals', and 'Value' with the value 'True'. A '+ Add Condition' button is located below this row. The bottom section, 'Set Field Values for the Service record Record', has a 'Field' field with the value 'Service_Status__c' and a 'Value' field with the value 'Completed'. An arrow points from the 'Value' field to the 'Field' field. A '+ Add Field' button is located below this row.

Set Filter Conditions

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

Field: Quality_Check_Status__c Operator: Equals Value: True

+ Add Condition

Set Field Values for the Service record Record

Field: Service_Status__c Value: Completed

+ Add Field

- Click On Done.
- Click on save
- Given the Flow label as Update Service Status , Flow Api name will be auto populated.
- And click save, and click on activate.

MILESTONE – 14

Apex Trigger

ACTIVITY -1 :- Apex handler

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

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

```

1 public class AmountDistributionHandler {
2
3     public static void amountDist(list<Appointment__c> listApp){
4         list<Service_records__c> servlist = 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 = 8000;
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 }

```

```

32
33     }
34     else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
35         app.Service_Amount__c = 8000;
36     }
37     else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
38         app.Service_Amount__c = 7000;
39     }
40     else if(app.Maintenance_service__c == true){
41         app.Service_Amount__c = 2000;
42     }
43     else if(app.Repairs__c == true){
44         app.Service_Amount__c = 3000;
45     }
46     else if(app.Replacement_Parts__c == true){
47         app.Service_Amount__c = 5000;
48     }
49 }
50 }
51 }

```

Code:

```

public class AmountDistributionHandler {

    public static void amountDist(list<Appointment__c> listApp){

```

GARAGE MANAGEMENT SYSTEM

```
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){
```


GARAGE MANAGEMENT SYSTEM

```
app.Service_Amount__c = 5000;
```

```
}
```

```
}
```

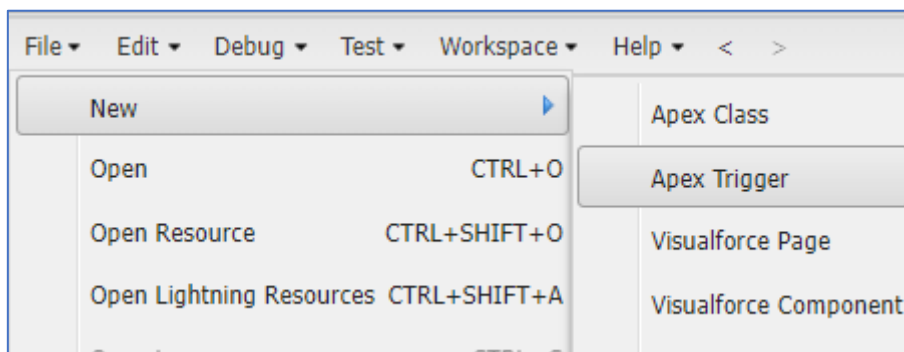
```
}
```

```
}
```

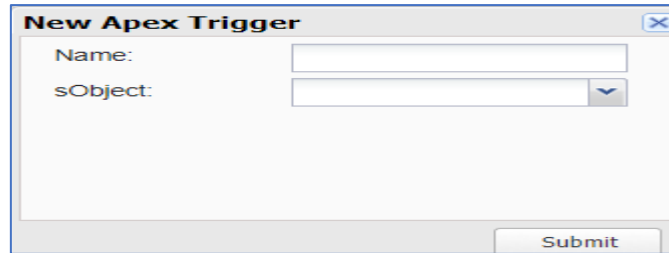
Trigger Handler :

How to create a new trigger :

- While still in the trailhead account, navigate to the gear icon in the top right corner.
- Click on developer console and you will be navigated to a new console window.
- Click on File menu in the tool bar, and click on new? Trigger.
- Enter the trigger name and the object to be triggered.
- Name : AmountDistribution
- **sObject : Appointment__c**



GARAGE MANAGEMENT SYSTEM



Syntax For creating trigger :

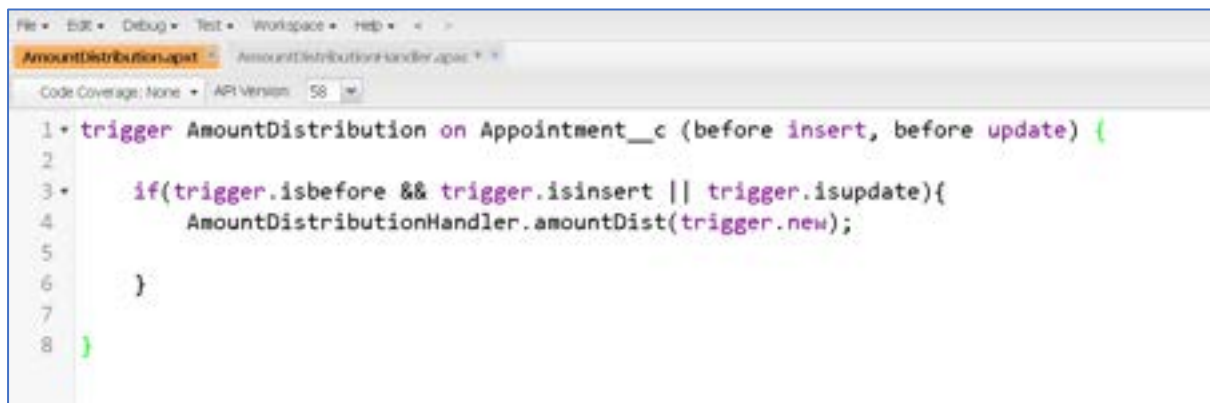
The syntax for creating trigger is :

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);
```

```
    }
```

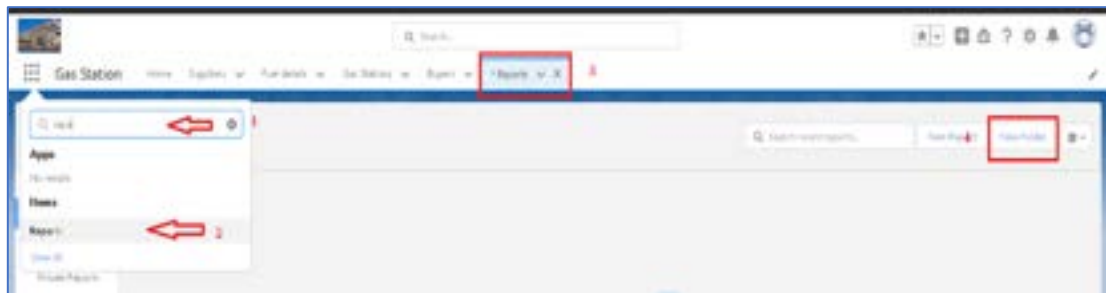
GARAGE MANAGEMENT SYSTEM

MILESTONE – 15

Reports

ACTIVITY – 1:- create a report folder

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



- Give the Folder label as "Garage Management Folder", Folder unique name will be auto populated.
- Click save.

tion

essi

23, 1

On

Create folder

* Folder Label

Garage Management Folder

* Folder Unique Name

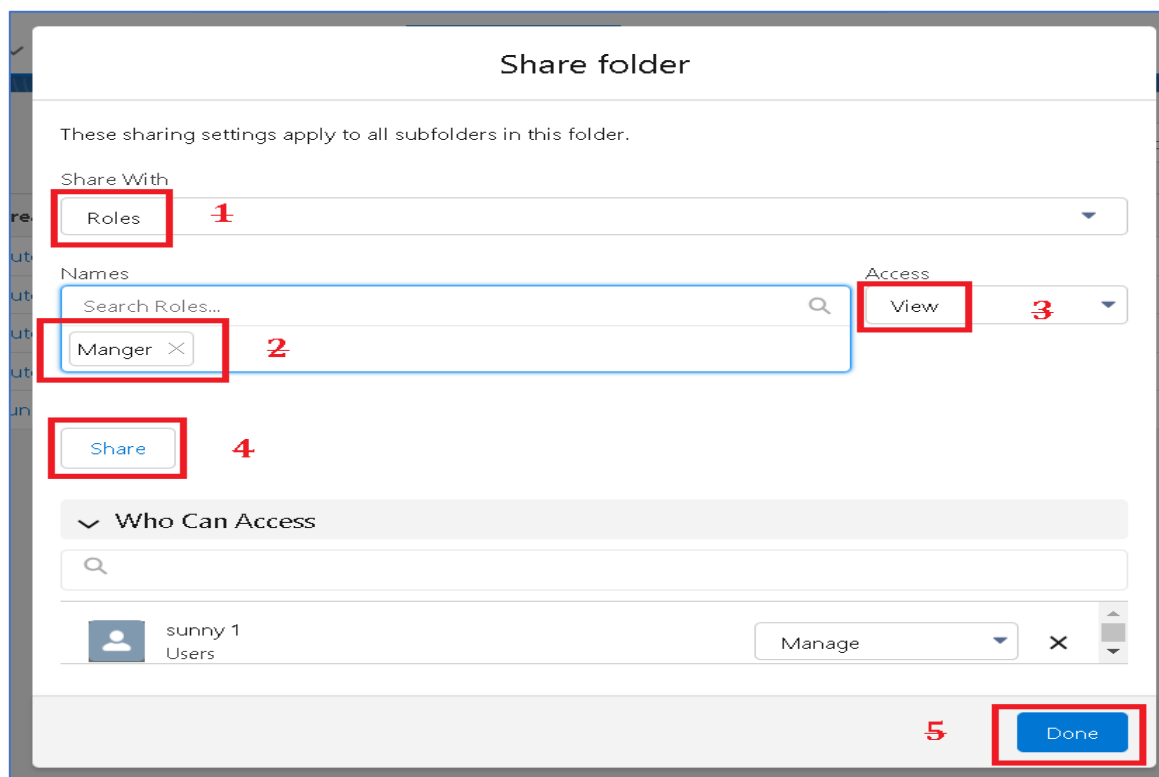
GarageManagementFolder

Cancel Save

GARAGE MANAGEMENT SYSTEM

ACTIVITY – 2: - Sharing a report folder

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



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

sunny 1 Users

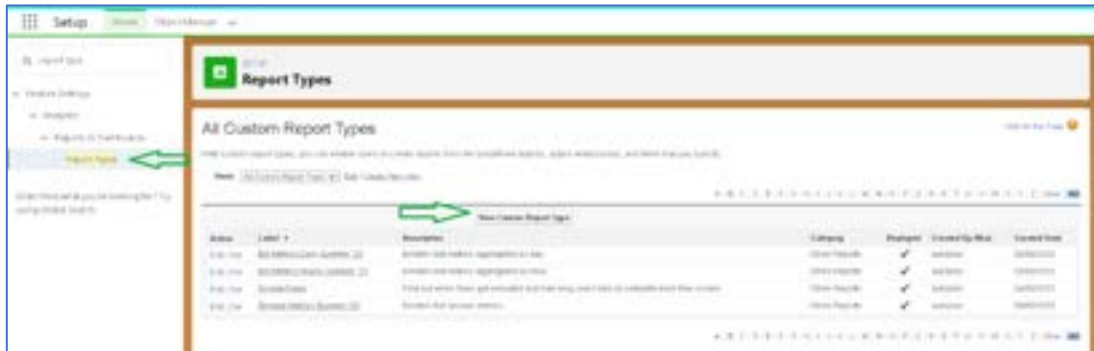
Manage

Done 5

GARAGE MANAGEMENT SYSTEM

ACTIVITY – 3:- Create Report Type

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



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

- now , Click on Related object box.

GARAGE MANAGEMENT SYSTEM

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

New Custom Report Type
Service information

Step 2: Define Report Records Set Step 2 of 2

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

A Customer Details
Primary Object

B Select Object
Appointment
Appointment
Duplicate Record Item

A and 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)

Previous Save Cancel

- Again, click to relate another object.

Step 2: Define Report Records Set

This report type will generate reports about Customer Details. You may define which related records from other objects a

A Customer Details
Primary Object

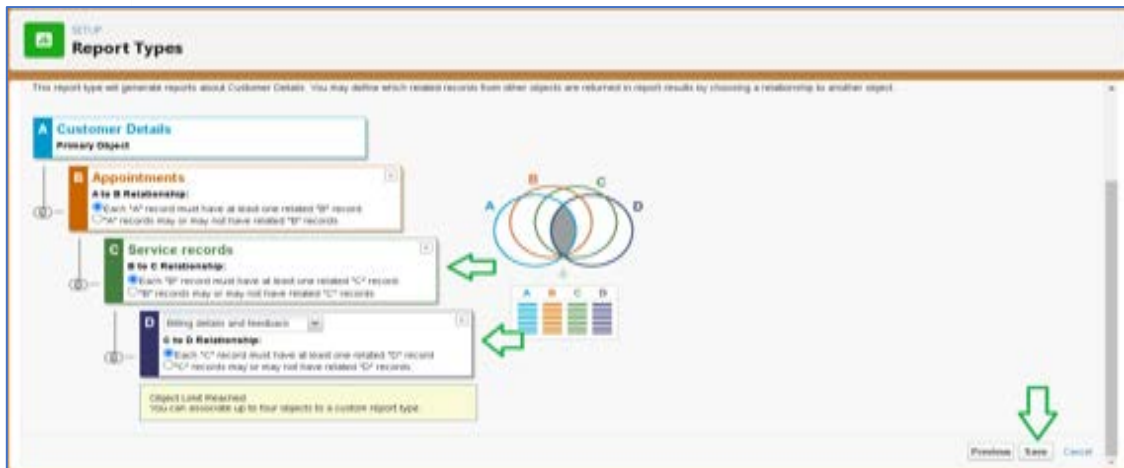
B Appointment

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)

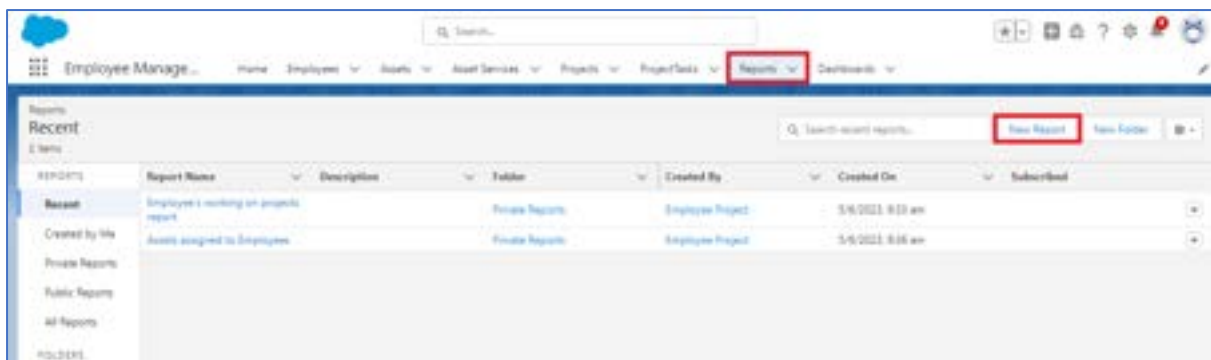
- And select the related object as " service records".
- Repeat the process and select the related object as " Billing details and feedback".
- And click on save.

GARAGE MANAGEMENT SYSTEM

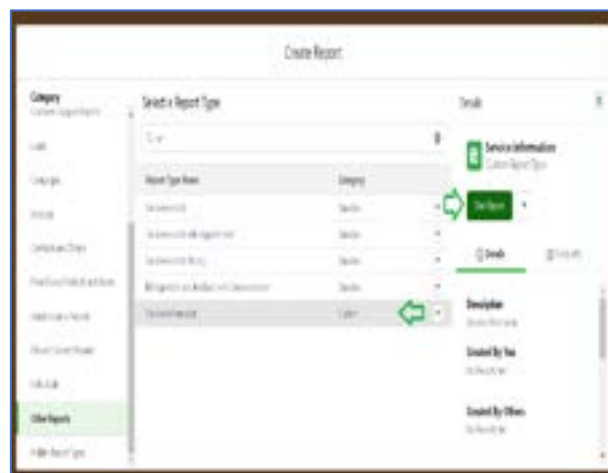


ACTIVITY – 4 :- Create Report

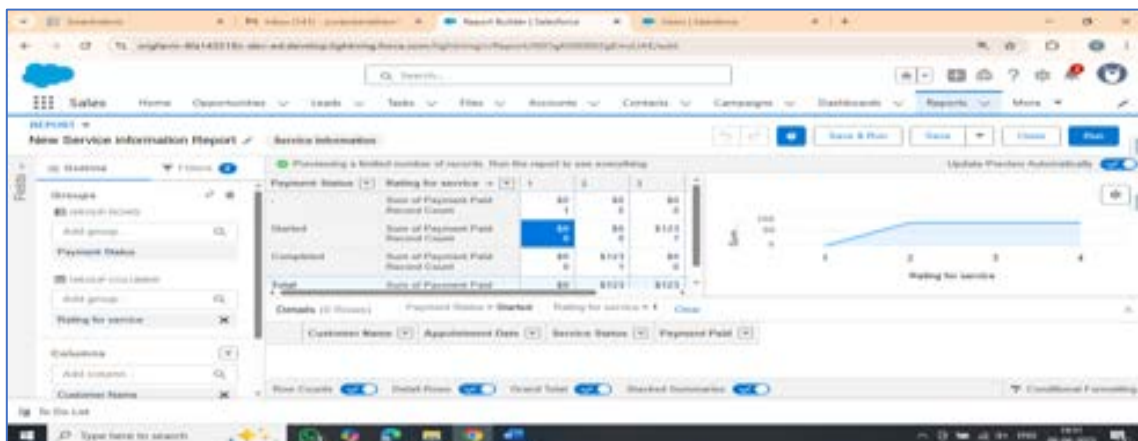
- Go to the app >> click on the reports tab
- Click New Report.



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



- Their outline pane is opened already, select the fields that mentioned below in column section.
 - Customer name
 - Appointment Date
 - Service Status
 - Payment paid
- Remove the unnecessary fields.
- Select the fields that mentioned below in GROUP ROWS section.
 - Rating for Service
- Select the fields that mentioned below in GROUP



Save Report

Report Name

New Service Information Report

Report Unique Name

New_Service_Information_Report_01/16

Report Description

Folder

Garage Management Folder

Select Folder

Cancel

Save

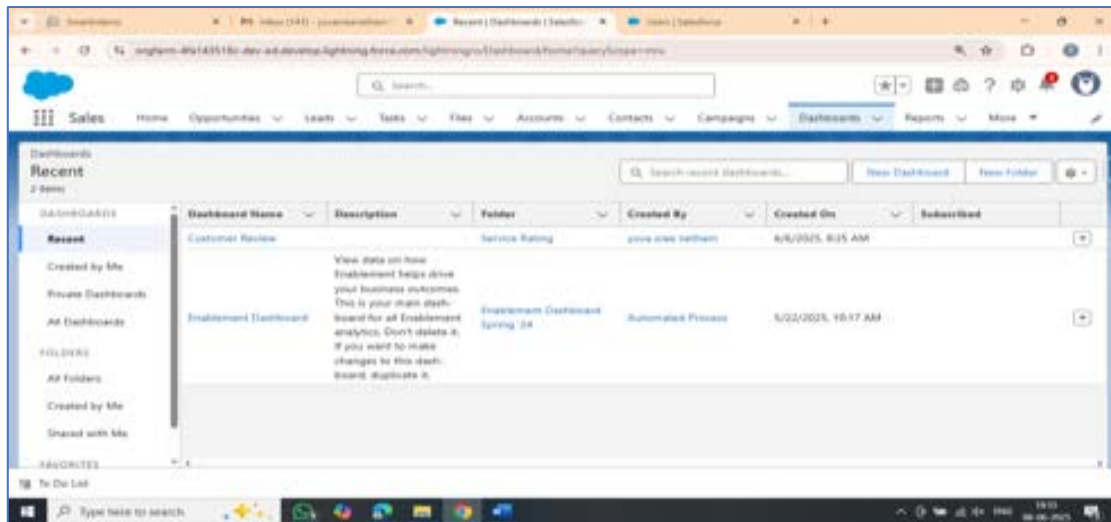
GARAGE MANAGEMENT SYSTEM

MILESTONE – 16

Dashboards

ACTIVITY – 1 :- Create Dashboard Folder

- Click on the app launcher and search for dashboard.
- Click on dashboard tab.



- Click new folder, give the folder label as " Service Rating dashboard".
- Folder unique name will be auto populated.
- Click save.

Create folder

Folder Label: Service Rating

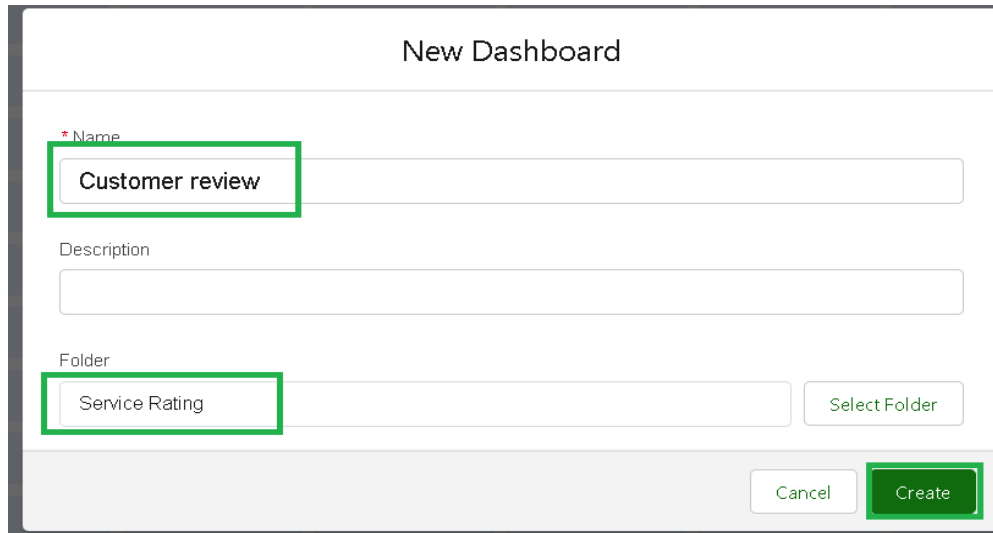
Folder Unique Name: ServiceRating

Cancel Save

GARAGE MANAGEMENT SYSTEM

ACTIVITY – 2: Create Dashboard

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



New Dashboard

*Name
Customer review

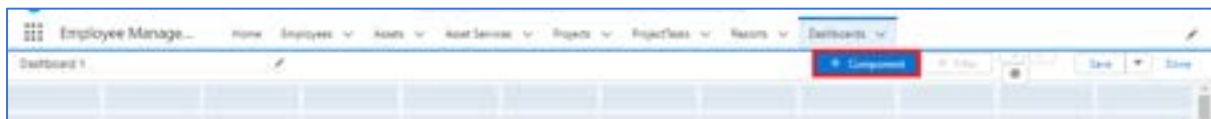
Description

Folder
Service Rating

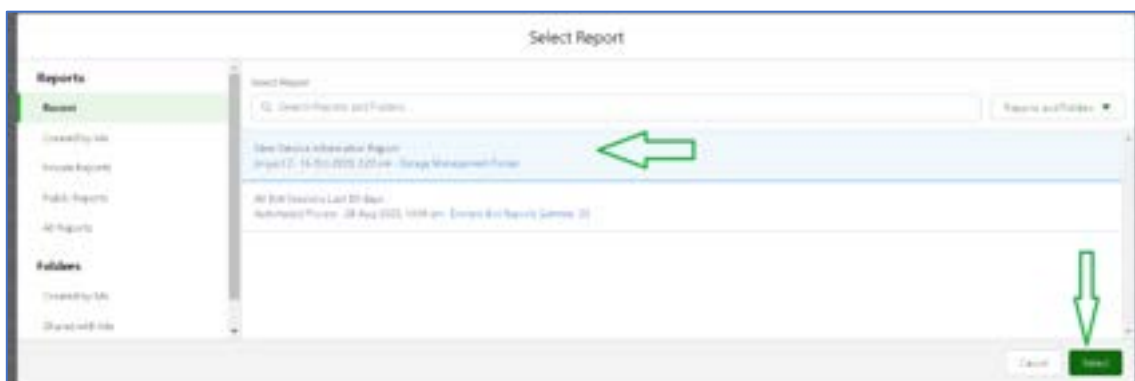
Select Folder

Cancel Create

- Select add component



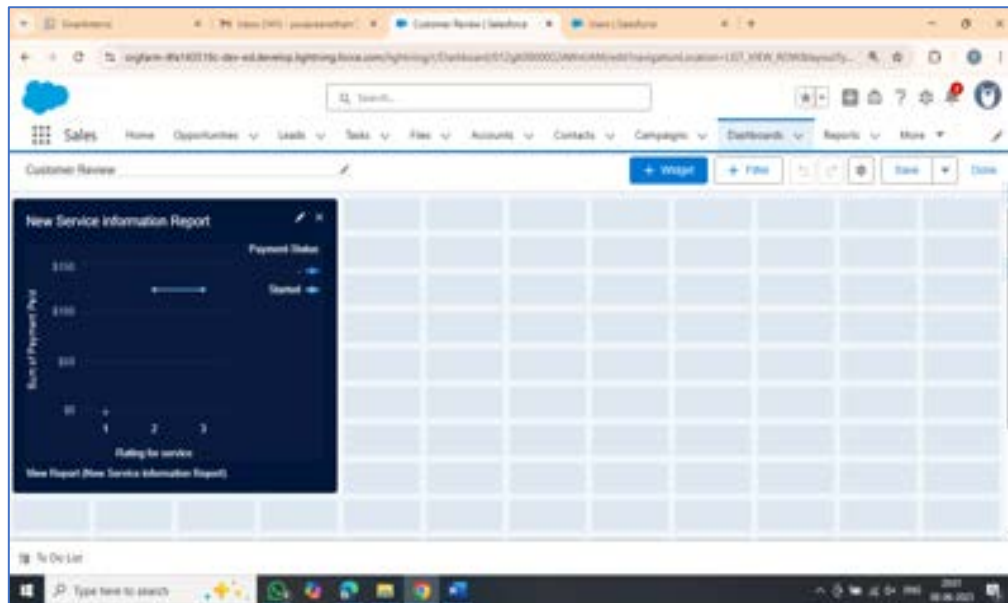
- Select a Report and click on select.



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

GARAGE MANAGEMENT SYSTEM

- Preview is shown below.



GARAGE MANAGEMENT SYSTEM

MILESTONE – 17

User Adoption

ACTIVITY – 1 : creating records

To create a record in the follow objects, follow these steps

- Click on the app launcher located at the left side of the screen.
- Search for "Garage Management" and click on it.
- Click on the "Consumer details tab".
- Click on new and fill the details as shown below figs, and click save.

The screenshot shows a web application window titled "New Customer Detail". It features a form with the following elements:

- Title:** New Customer Detail
- Legend:** * = Required Information
- Section:** Information
- Fields:**
 - * Customer Name: Mac
 - Phone number: 5678765567
 - Email: mac@gmail.com
- Owner:** Annapurna SmartBridge
- Buttons:** Cancel, Save & New, Save

Now, Create the Appointment Record

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

GARAGE MANAGEMENT SYSTEM

The screenshot shows the 'Appointment' form in the Garage Management System. The form is titled 'Appointment: app-016'. It includes a navigation bar with tabs: Customer Details, Appointments (selected), Service records, Billing details and feedback, Reports, and Dashboard. The form fields are as follows:

- Appointment Name:** app-016
- Owner:** Annapurna SmartBridge
- Customer Details:**
 - Mac:** IT
- * Appointment Date:** 11/11/2024
- Maintenance service:** ☒
- Repairs:** ☒
- Replacement Parts:** ☐
- Service Amount:** (empty field)
- * Vehicle number plate:** TS30DU443

At the bottom, there are 'Cancel' and 'Save' buttons.

Now, Create a service Record

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

The screenshot shows the 'New Service record' form. It has a title bar 'New Service record' and a legend '* = Required Information'. The form is divided into an 'Information' section with the following fields:

- Service Record Name:** (empty field)
- Owner:** Annapurna SmartBridge
- * Appointment:** app-016 (selected from a dropdown menu)
- Quality Check Status:** ☐
- Service Status:** Started (selected from a dropdown menu)

At the bottom, there are 'Cancel', 'Save & New', and 'Save' buttons.

- Open the record and click on Quality check status as true.
- Click on save.

GARAGE MANAGEMENT SYSTEM

Service Record Name
ser-010

Owner
Annapurna SmartBridge

* Appointment
app-016

Quality Check Status
☒

Service Status
Started

service date
18/11/2024
This field is calculated upon save

Created By
Annapurna SmartBridge, 18/11/2024, 4:32 pm

Cancel Save

- Now automatically Service status will be moved to completed.

Related Details

Service Record Name
ser-010

Appointment
app-016

Quality Check Status
☒

Service Status
Completed

service date
18/11/2024

Created By
Annapurna SmartBridge, 18/11/2024, 4:32 pm

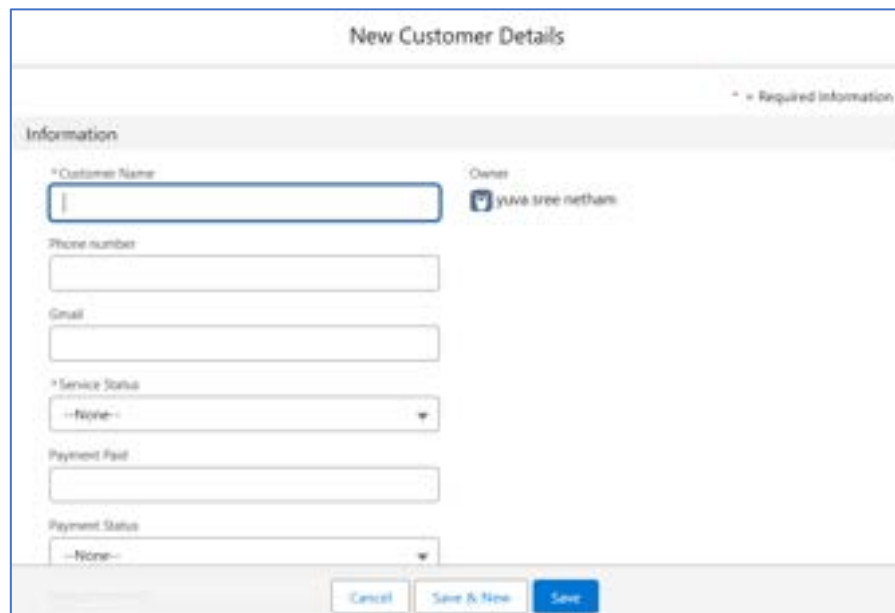
Owner
Annapurna SmartBridge

Last Modified By
Annapurna SmartBridge, 18/11/2024, 4:34 pm

GARAGE MANAGEMENT SYSTEM

Outputs:

Customer Details:

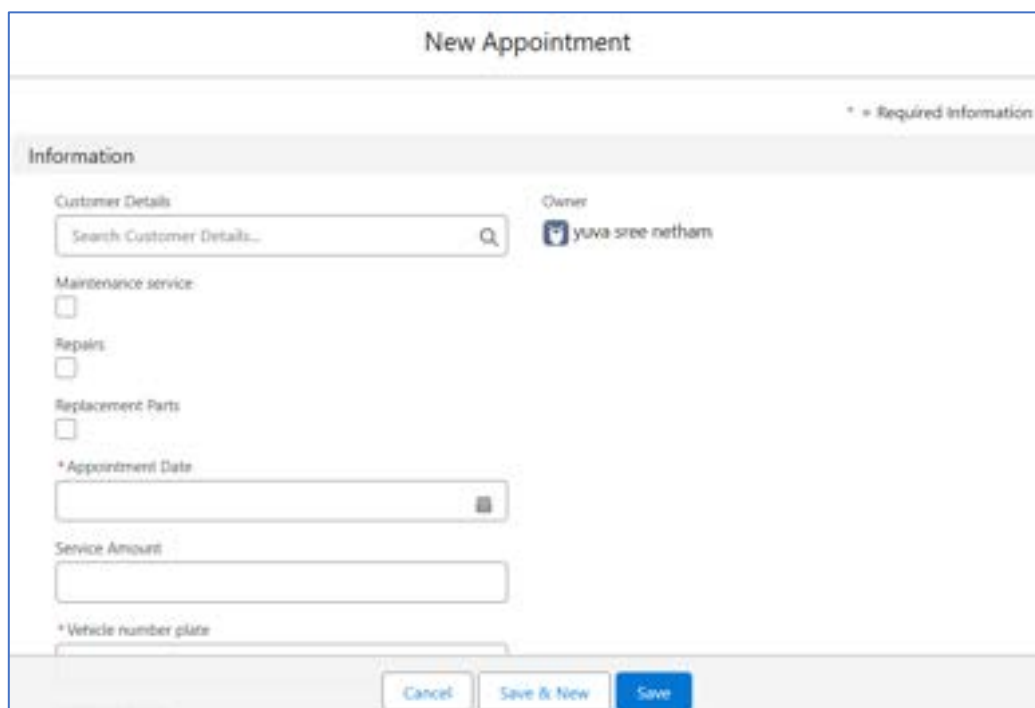


The 'New Customer Details' form is titled 'New Customer Details' and includes a legend '* = Required Information'. It contains the following fields:

- * Customer Name: A text input field.
- Owner: A dropdown menu showing 'yuva tree netham'.
- Phone number: A text input field.
- Gmail: A text input field.
- * Service Status: A dropdown menu showing 'None'.
- Payment Paid: A text input field.
- Payment Status: A dropdown menu showing 'None'.

At the bottom, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

Appointment:



The 'New Appointment' form is titled 'New Appointment' and includes a legend '* = Required Information'. It contains the following fields:

- Customer Details: A search input field with the placeholder 'Search Customer Details...' and a magnifying glass icon.
- Owner: A dropdown menu showing 'yuva tree netham'.
- Maintenance service: A checkbox.
- Repairs: A checkbox.
- Replacement Parts: A checkbox.
- * Appointment Date: A date input field with a calendar icon.
- Service Amount: A text input field.
- * Vehicle number plate: A text input field.

At the bottom, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

GARAGE MANAGEMENT SYSTEM

Service Records:

New Service records

* = Required Information

Information

Service records Name

Owner
yuva sree netham

Quality Check Status
☐

Service Status
--None--

* Appointment
Search Appointments...

Cancel

Save & New

Save

Billing Details and Feedback:

New Billing details and feedback

* = Required Information

Information

Billing details and feedback Name

Owner
yuva sree netham

* Rating for service

Payment Status
--None--

Service records
Search Service records...

* Payment Paid

Cancel

Save & New

Save