Garage Management system

INTRODUCTION:

The Garage Management System (GMS) is a robust software solution designed to enhance the efficiency and functionality of automotive repair shops, service centers, and garages. By offering a wide range of features tailored to the needs of mechanics, service advisors, and business owners, GMS ensures streamlined workflows and improved customer satisfaction. Its intuitive interface and advanced capabilities empower garages to excel in a competitive environment, fostering strong customer relationships and operational excellence.

Key Features of GMS:

1. **Appointment Scheduling**:
   - Simplifies the process of booking service appointments for customers.
   - Helps staff efficiently organize daily schedules, minimizing idle time and optimizing resource utilization.
2. **Vehicle Management**:
   - Keeps comprehensive records of each vehicle, including service history, repair details, and maintenance schedules.
   - Monitors the status of vehicles during servicing, enhancing communication with customers.
3. **Customer Relationship Management (CRM)**:
   - Stores essential customer information and preferences.
   - Sends reminders for services, follow-up messages, and promotional offers to foster customer loyalty.
4. **Inventory and Spare Parts Management**:
   - Monitors stock levels of spare parts and automates reordering to avoid shortages.
   - Ensures mechanics have the required tools and parts readily available.
5. **Billing and Invoicing**:
   - Creates accurate and professional invoices with ease.
   - Supports various payment options, discounts, and tax calculations.
6. **Work Order Management**:
   - Generates detailed work orders that include tasks, estimated costs, and deadlines.

- Assists staff in prioritizing tasks and completing jobs on time.

7. **Reporting and Analytics**:
   - Delivers insights into key performance metrics such as revenue, job completion rates, and customer feedback.
   - Identifies patterns and highlights opportunities for improvement.

GMS serves as a comprehensive tool to enhance service quality, streamline operations, and strengthen customer engagement, enabling automotive repair facilities to thrive while offering a seamless experience for both customers and staff.

Salesforce

Introduction:

Are you new to Salesforce and unsure about what it is or how to get started? Wondering where to begin your learning journey? If you said yes to any of these, you're in the right place! This module is here to guide you.

Welcome to Salesforce! It's a revolutionary platform equipped with productivity-enhancing tools designed to help you work smarter and faster. As you progress through this module, you'll explore its key features and answer the fundamental question, *"What exactly is Salesforce?"*

What Is Salesforce?

Salesforce is a platform designed to ensure customer success, helping you with selling, servicing, marketing, analyzing, and connecting with your customers.

It provides all the tools you need to manage your business from anywhere. By leveraging its standard products and features, you can:

- Maintain relationships with prospects and customers.
- Collaborate effectively with employees and partners.
- Securely store your data in the cloud.

Before Salesforce, tasks like managing contacts, emails, follow-ups, and deals might have been scattered and unorganized. Salesforce simplifies these operations into one cohesive platform.

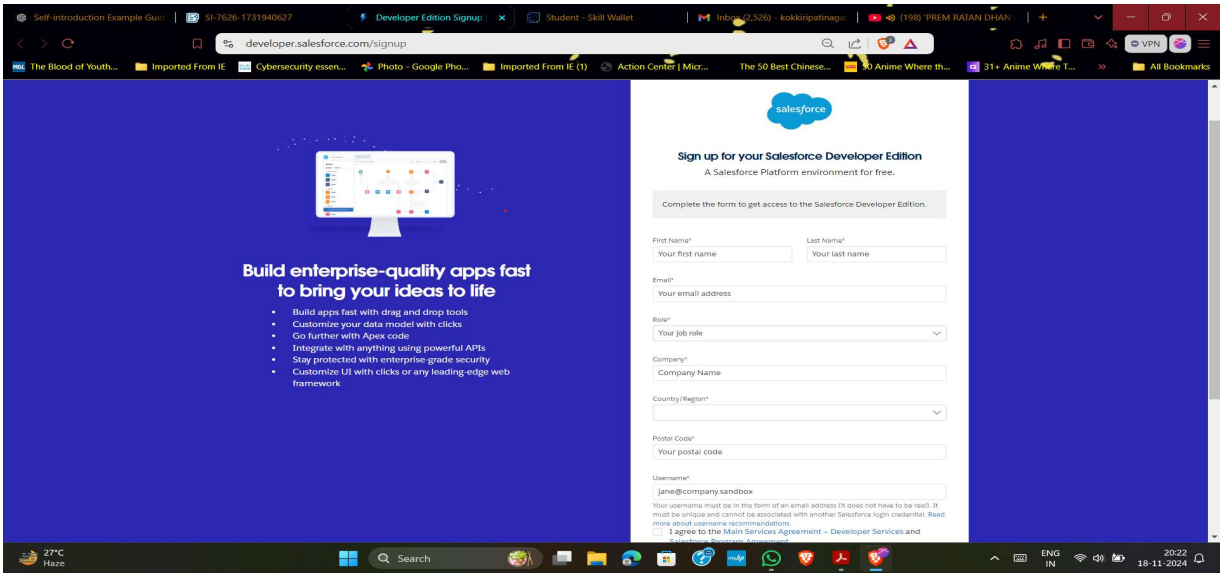
Creating Developer Account:

How to Create a Developer Account in Salesforce:

1. Visit **Salesforce Developer Signup**.
2. Fill out the sign-up form with the following details:
    - **First Name & Last Name**: Your full name.
    - **Email Address**: Provide a valid email.
    - **Role**: Select "Developer."

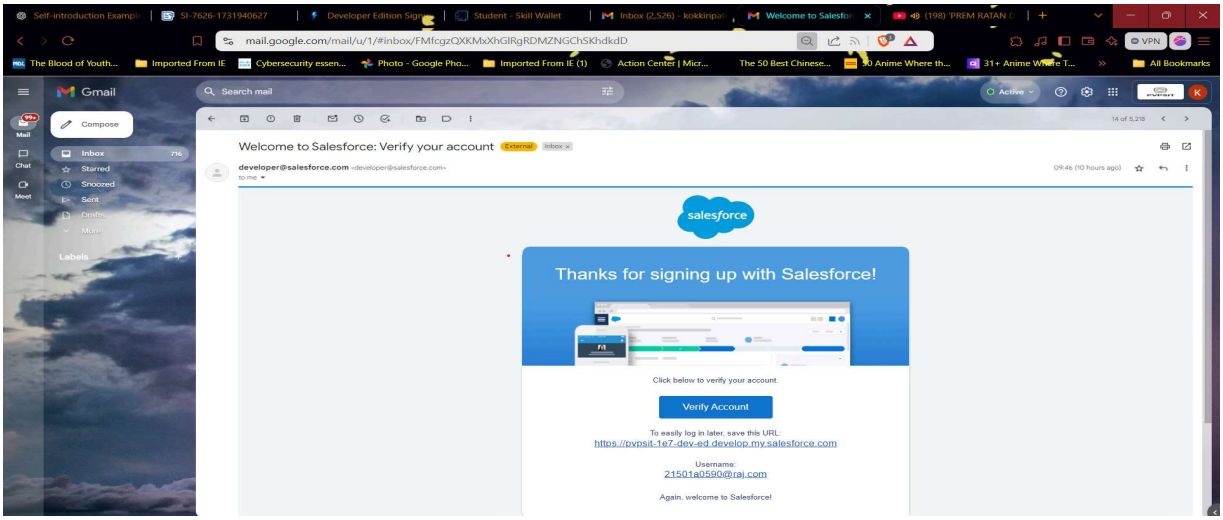
- **Company**: Enter your college name.
- **Country**: Choose "India."
- **Postal Code**: Enter your area's pin code.
- **Username**: Create a username using the format `yourname@organization.com`. It doesn't have to be a real email.

3. Once all the details are entered, click **Sign Me Up** to complete the process.



Account Activation:

1. Go to the inbox of the email that you used while signing up.
2. Click on the **verify account** link to activate your account.



OBJECT

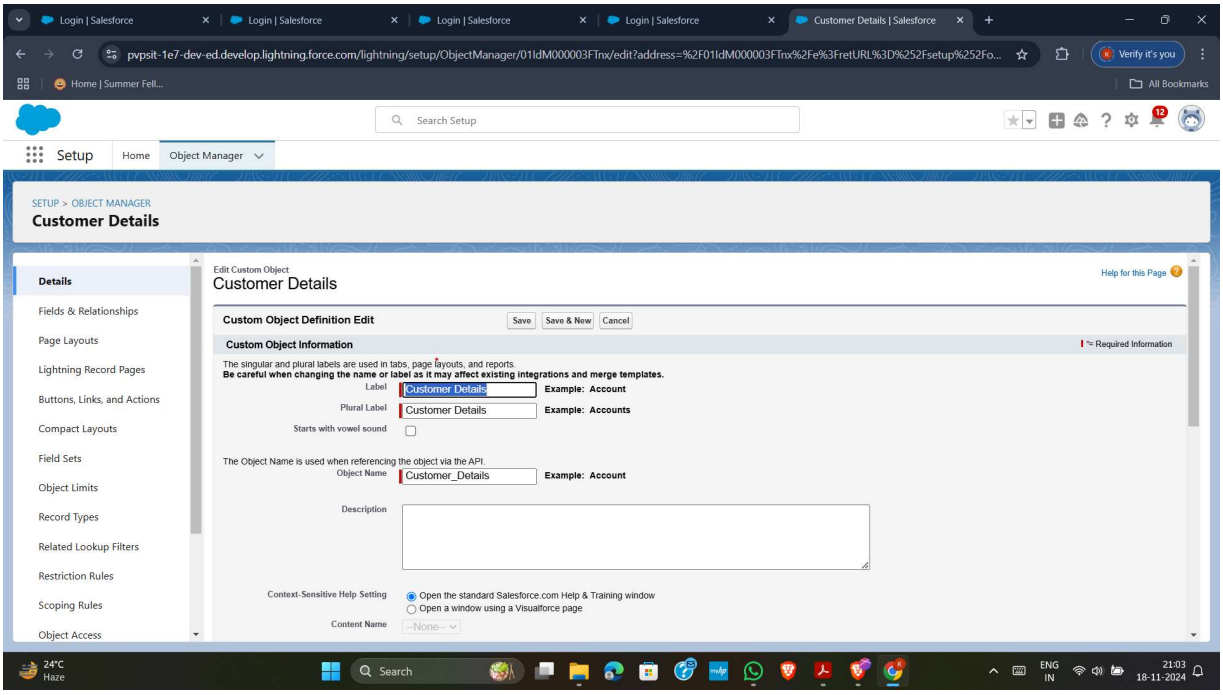
What Is an Object? In Salesforce, objects are database tables that allow you to store data specific to an organization. They form the foundation of how Salesforce organizes and manages data.

Types of Salesforce Objects:

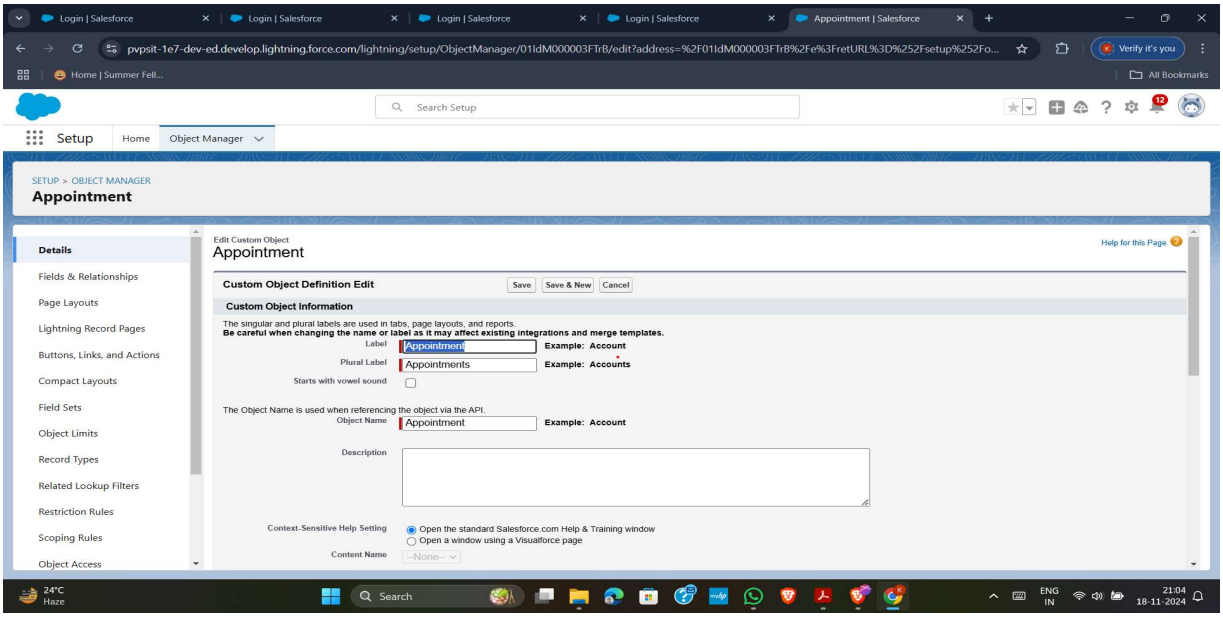
1. **Standard Objects**:
   - These are pre-built objects provided by Salesforce, such as Users, Contracts, Reports, Dashboards, and more.
2. **Custom Objects**:
   - These are user-created objects tailored to the unique needs of an organization. Custom objects are at the core of any application, enabling data sharing and customization specific to the business requirements.

Steps to Create Objects:

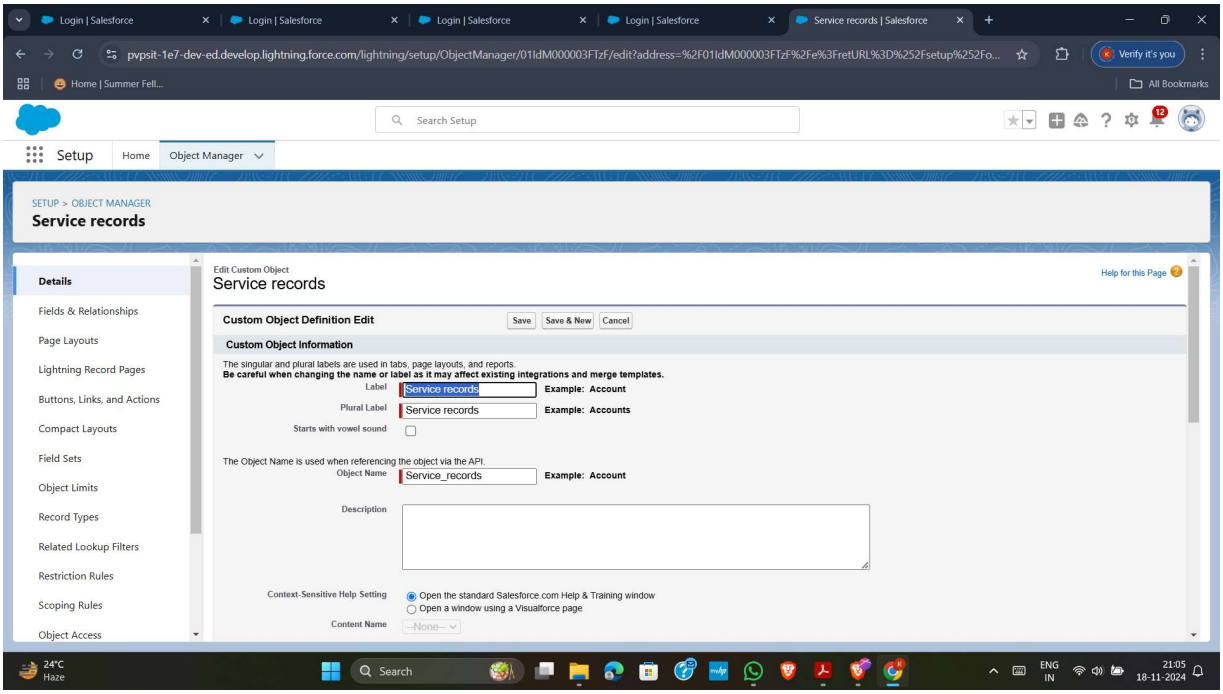
1. **Customer Details Object**:
   - Navigate to **Setup Page > Object Manager > Create > Custom Object**.
   - Fill in the following details:
     - Label Name: Customer Details
     - Plural Label Name: Customer Details
     - Record Name Label: Customer Name
     - Data Type: Text
   - Enable the following options:
     - Allow Reports
     - Track Field History
     - Allow Search
   - Click **Save**.



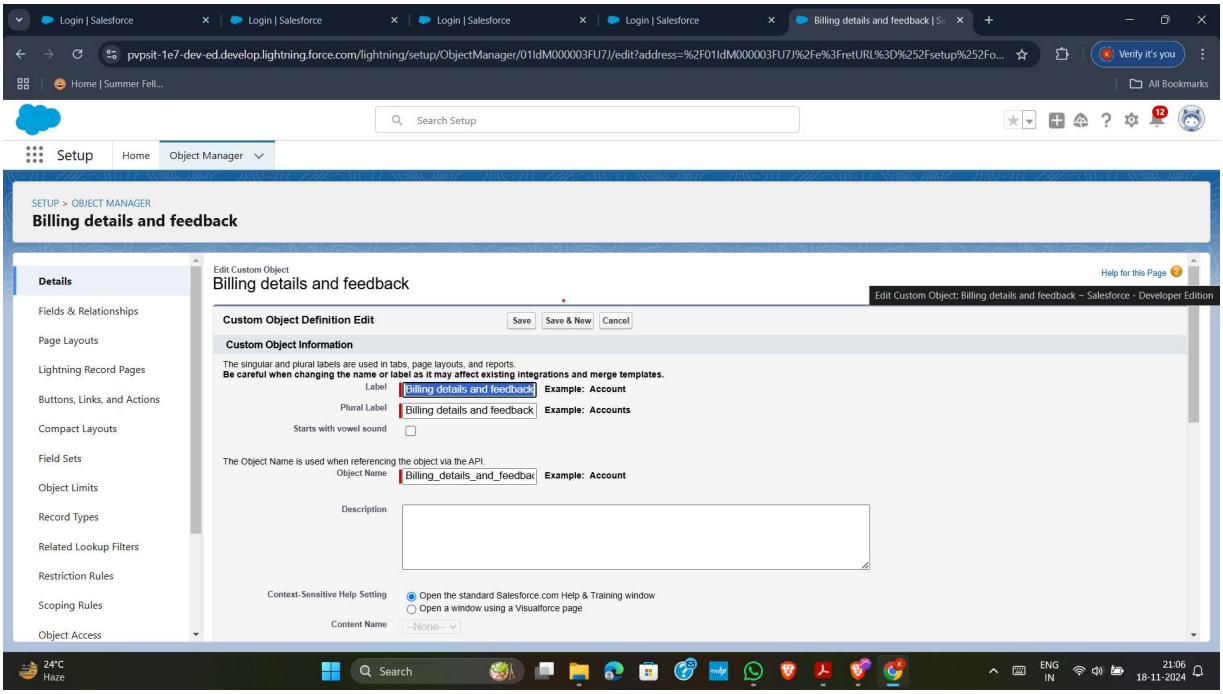
2. **Appointment Object**:
   - Repeat the above process with:
     - **Label Name**: Appointment
     - **Record Name Label**: Appointment Name
     - **Data Type**: Auto Number
     - Display Format: `app-{000}`
     - Starting Number: 1



3. **Service Records Object**:
    - Label Name: Service Records
    - Record Name Label: Service Records Name
    - Data Type: Auto Number
    - Display Format: `ser-{000}`
    - Starting Number: 1



4. **Billing Details and Feedback Object**:
    - Label Name: Billing Details and Feedback
    - Record Name Label: Billing Details and Feedback Name
    - Data Type: Auto Number
    - Display Format: `bill-{000}`
    - Starting Number: 1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Billing details and feedback
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Fields & Relationships
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Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Restriction Rules
Scoping Rules
Object Access
Edit Custom Object
Billing details and feedback
Help for this Page
Edit Custom Object: Billing details and feedback ~ Salesforce - Developer Edition
Custom Object Definition Edit
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Custom Object Information
The singular and plural labels are used in tabs, page layouts, and reports.
Be careful when changing the name or label as it may affect existing integrations and merge templates.
Label
Billing details and feedback
Example: Account
Plural Label
Billing details and feedback
Example: Accounts
Starts with vowel sound
The Object Name is used when referencing the object via the API.
Object Name
Billing_details_and_feedbac
Example: Account
Description
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Open a window using a Visualforce page
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Tabs

What Is a Tab?

A tab is a user interface element in Salesforce that allows you to create and view records associated with objects. Tabs provide an organized way to interact with data stored in Salesforce objects.

Types of Tabs

1. **Custom Tabs**
   - Custom object tabs serve as the interface for custom applications you create in Salesforce.
   - They function similarly to standard Salesforce tabs like Accounts, Contacts, and Opportunities.
2. **Web Tabs**
   - Display embedded web content or applications within the Salesforce window.
   - Allow users to quickly access frequently used content or tools without leaving Salesforce.
3. **Visualforce Tabs**
   - Display custom Visualforce pages.
   - These tabs look and behave like standard Salesforce tabs, such as Accounts and Opportunities.
4. **Lightning Component Tabs**
   - Enable the integration of Lightning components into the navigation menu for Lightning Experience and the mobile app.
5. **Lightning Page Tabs**
   - Add Lightning Pages to the mobile app navigation.
   - Unlike other custom tabs, they don’t appear on the All Tabs page or in the Available Tabs list when customizing app tabs.

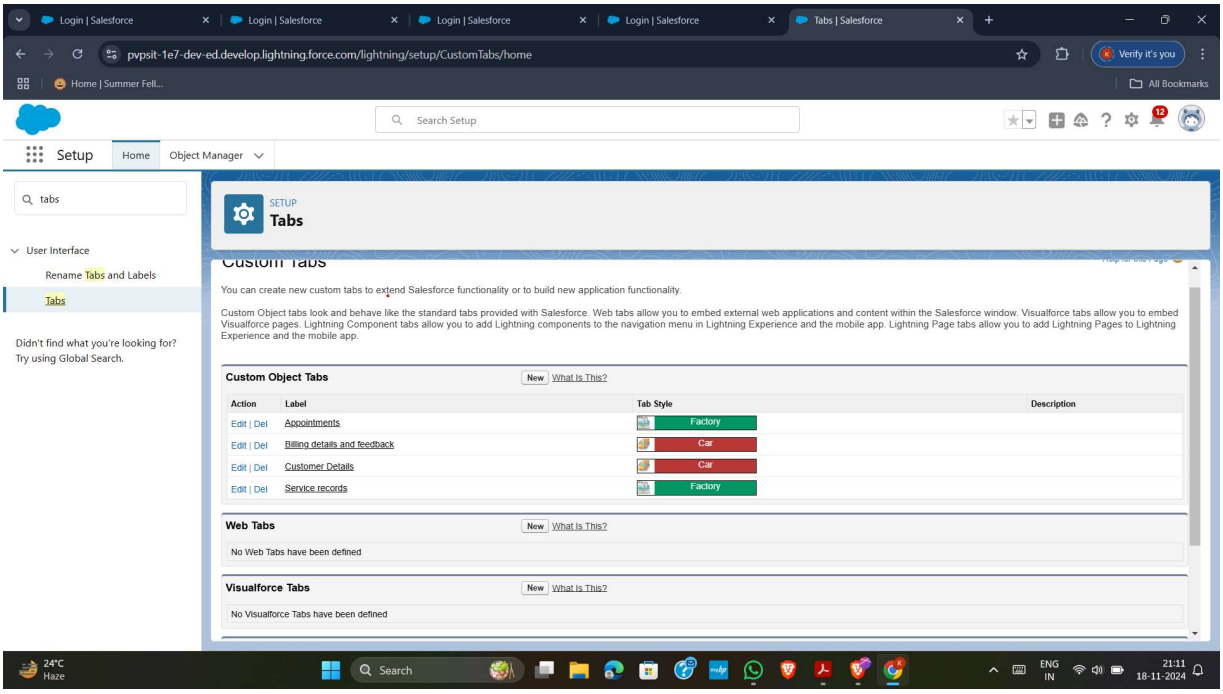
Steps to Create Tabs

1. **Creating a Custom Tab (Customer Details)**
   - Go to the **Setup Page**, type "Tabs" in the Quick Find bar, and click on **Tabs**.
   - Under **Custom Object Tabs**, click **New**.

- Select the object **Customer Details** and choose a tab style.
- Click **Next** to proceed to the profiles page and leave the default settings.
- Click **Next** again for the Custom App settings and uncheck the option to include the tab.
- Ensure the option **Append tab to users' existing personal customizations** is checked.
- Click **Save** to create the tab.

2. **Creating Tabs for Remaining Objects**
   Repeat the steps above for these objects:
   - **Appointments**
   - **Service Records**
   - **Billing Details and Feedback**

By following this process, you can add tabs for all necessary custom objects in your Salesforce environment.



The Lightning App

What Is a Lightning App?

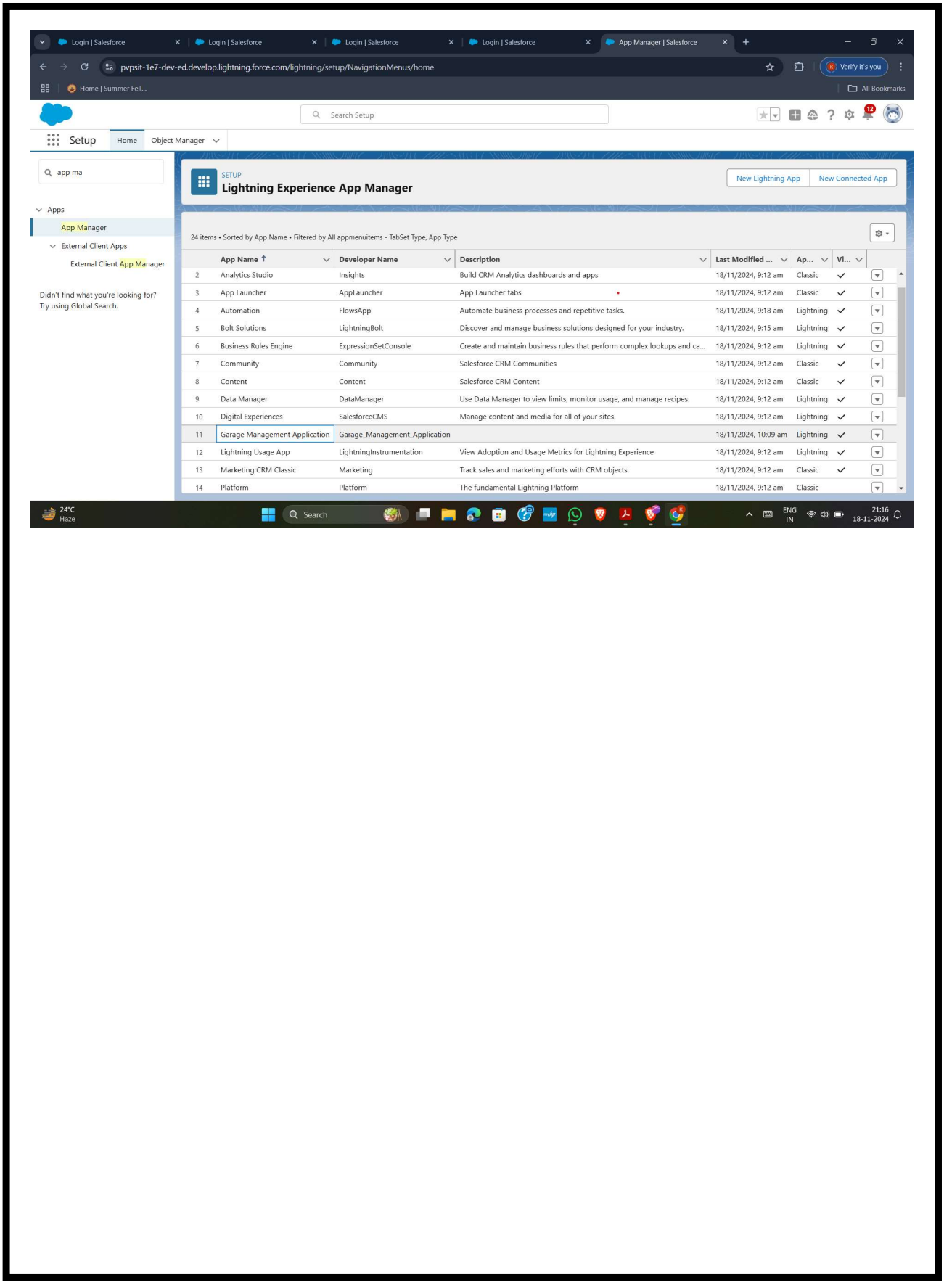
A Lightning app is a collection of tools, objects, tabs, and other resources bundled together for a specific purpose. These apps provide users with a convenient navigation bar in Lightning Experience, allowing seamless access to everything they need for their tasks.

Lightning apps enable customization, such as:

- Branding with custom colors and logos.
- Adding utility bars and Lightning page tabs.
  This improves user efficiency and makes switching between apps effortless.

Steps to Create a Lightning App

1. **Access the App Manager**
   - Navigate to the **Setup Page**.
   - Search for **App Manager** in the Quick Find bar and select it.
   - Click **New Lightning App** to begin.
2. **Fill App Details**
   - Enter the App Name as **Garage Management Application**.
   - Click **Next**.
   - On the **App Options Page**, keep the settings as default and click **Next**.
   - On the **Utility Items Page**, keep the default settings and click **Next** again.
3. **Add Navigation Items**
   - Search for the items to include in the app (e.g., **Customer Details, Appointments, Service Records, Billing Details and Feedback, Reports, and Dashboards**) in the search bar.
   - Use the arrow button to add them to the navigation menu.
   - Click **Next** to continue.
4. **Assign User Profiles**
   - In the **User Profiles** section, search for **System Administrator** in the search bar.
   - Use the arrow button to assign this profile to the app.
   - Click **Save & Finish** to complete the setup.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Try using Global Search.
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Lightning Experience App Manager
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3 App Launcher AppLauncher App Launcher tabs 18/11/2024, 9:12 am Classic
4 Automation FlowsApp Automate business processes and repetitive tasks. 18/11/2024, 9:18 am Lightning
5 Bolt Solutions LightningBolt Discover and manage business solutions designed for your industry. 18/11/2024, 9:15 am Lightning
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7 Community Community Salesforce CRM Communities 18/11/2024, 9:12 am Classic
8 Content Content Salesforce CRM Content 18/11/2024, 9:12 am Classic
9 Data Manager DataManager Use Data Manager to view limits, monitor usage, and manage recipes. 18/11/2024, 9:12 am Lightning
10 Digital Experiences SalesforceCMS Manage content and media for all of your sites. 18/11/2024, 9:12 am Lightning
11 Garage Management Application Garage_Management_Application 18/11/2024, 10:09 am Lightning
12 Lightning Usage App LightningInstrumentation View Adoption and Usage Metrics for Lightning Experience 18/11/2024, 9:12 am Lightning
13 Marketing CRM Classic Marketing Track sales and marketing efforts with CRM objects. 18/11/2024, 9:12 am Classic
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Fields

What Are Fields in Salesforce?

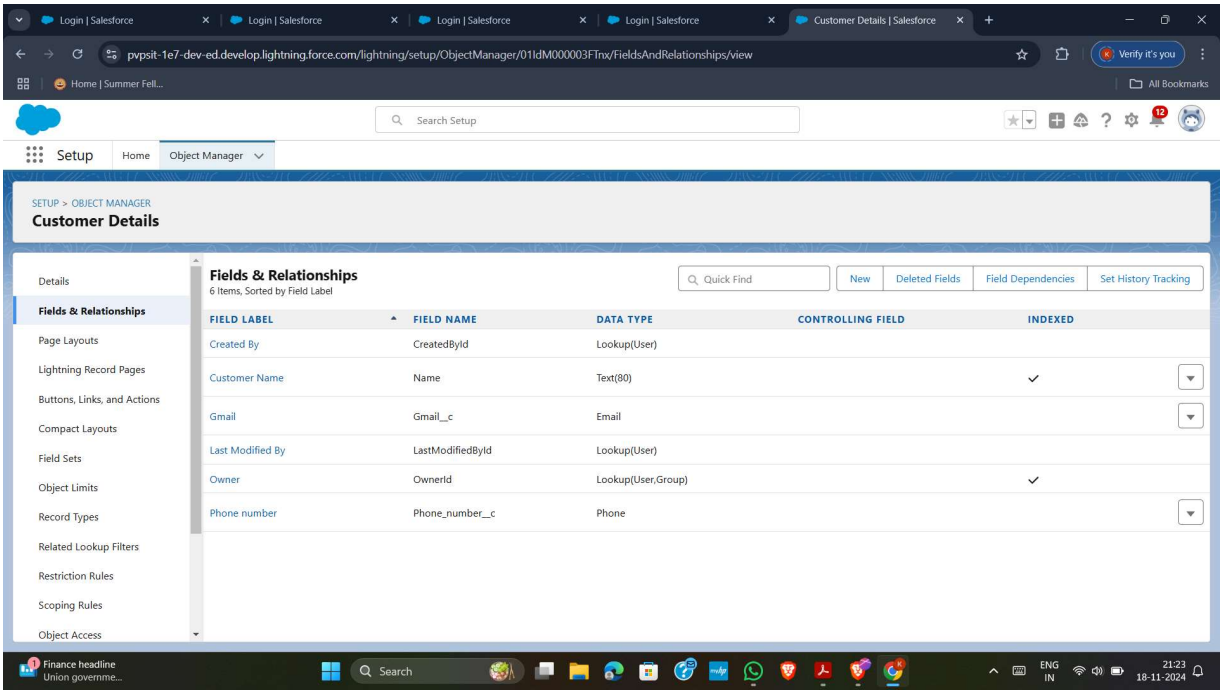
Fields represent data stored within the columns of a relational database. They hold critical information related to specific objects, enabling easy search, edit, or deletion of records.

Types of Fields in Salesforce

1. **Standard Fields**: Predefined fields provided by Salesforce, such as **Name, Created By, and Last Modified**.
2. **Custom Fields**: User-created fields tailored to store additional, specific data relevant to the organization's needs.

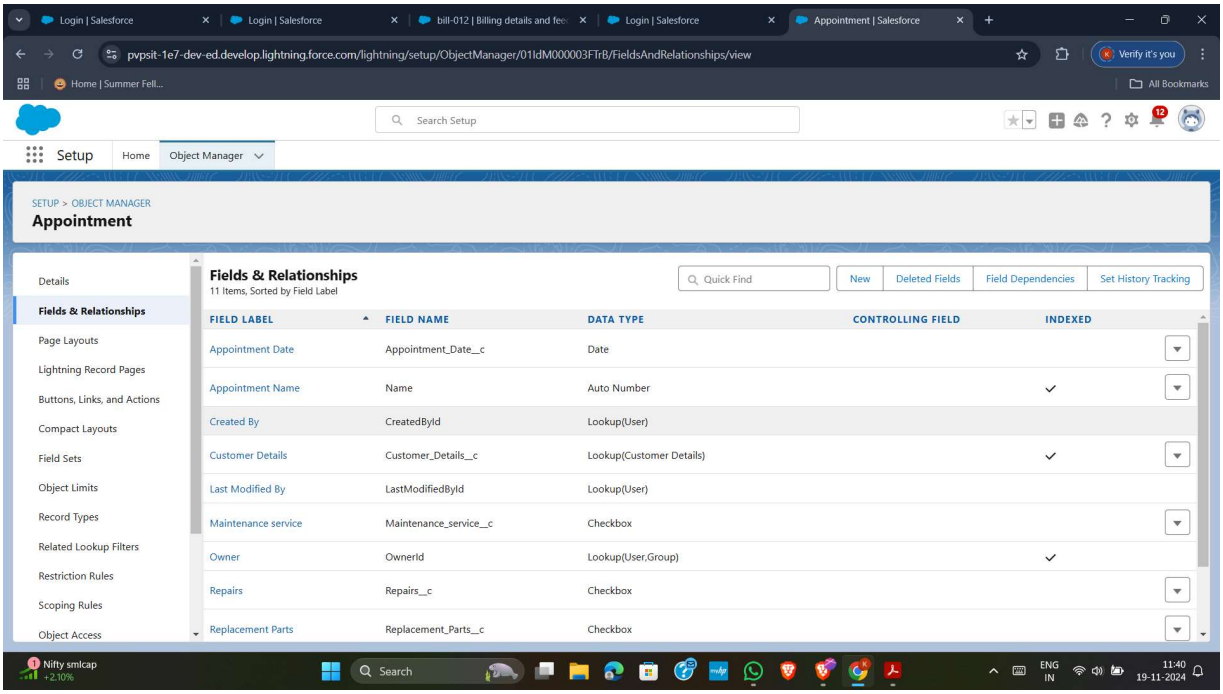
Steps to Create Fields for the Customer Details Object

1. **Creating a Field (Phone)**:
   - Navigate to **Setup > Object Manager**.
   - In the search bar, type **Customer Details**, and click on it.
   - Select **Fields & Relationships** from the left menu and click **New**.
   - Choose **Phone** as the data type and click **Next**.
   - Fill in:
     - **Field Label**: Phone Number
     - **Field Name**: Auto-generated by Salesforce.
   - Click **Next > Next > Save & New** to save the field and create another.
2. **Creating Another Field (Email)**:
   - Repeat the steps above but choose **Email** as the data type.
   - Fill in:
     - **Field Label**: Gmail
     - **Field Name**: Auto-generated by Salesforce.
   - Click **Next > Next > Save** to finish.

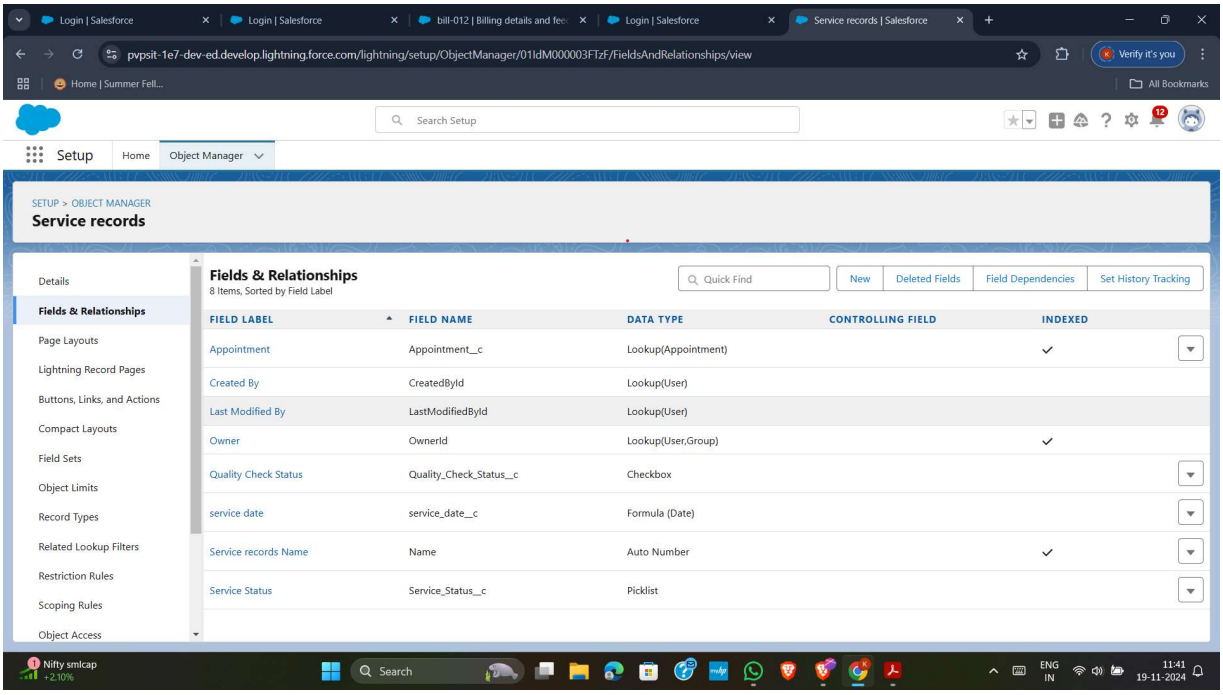


Creating Lookup Fields

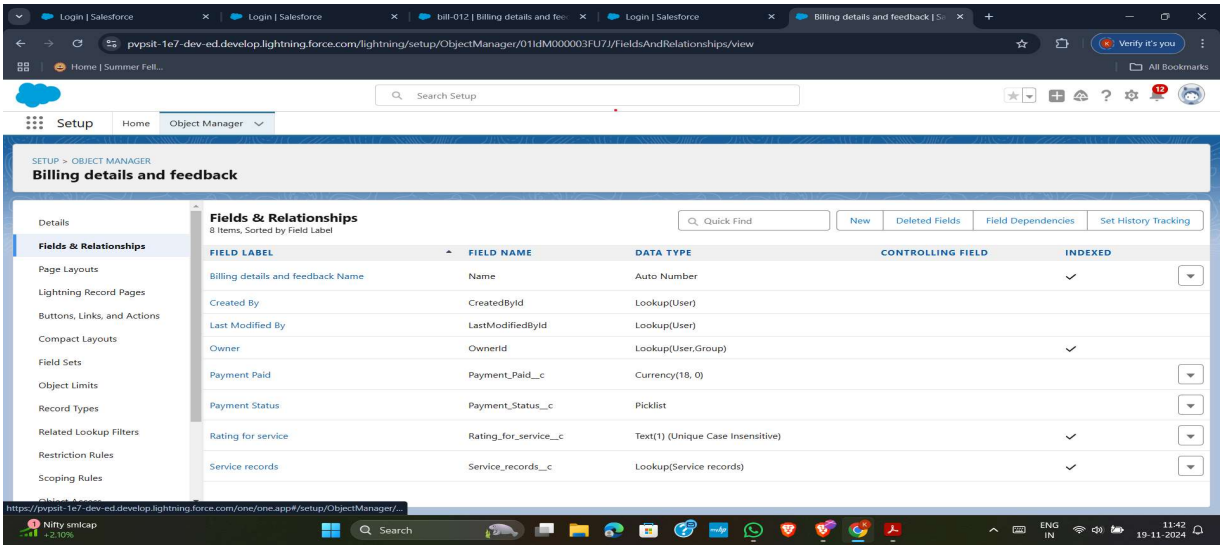
1. **Appointment Object:**
   - Navigate to *Object Manager > Appointment > Fields & Relationships > New*.
   - Select *Lookup Relationship*, link to *Customer Details*, and Save.



2. **Service Records Object:**
   - Same steps as above, linking to *Appointment*.
   - Set the field as *Required* and apply a *Lookup Filter* with:
     - Criteria: Appointment Date < Created Date.
     - Error: *Value does not match criteria*.
   - Activate and Save.



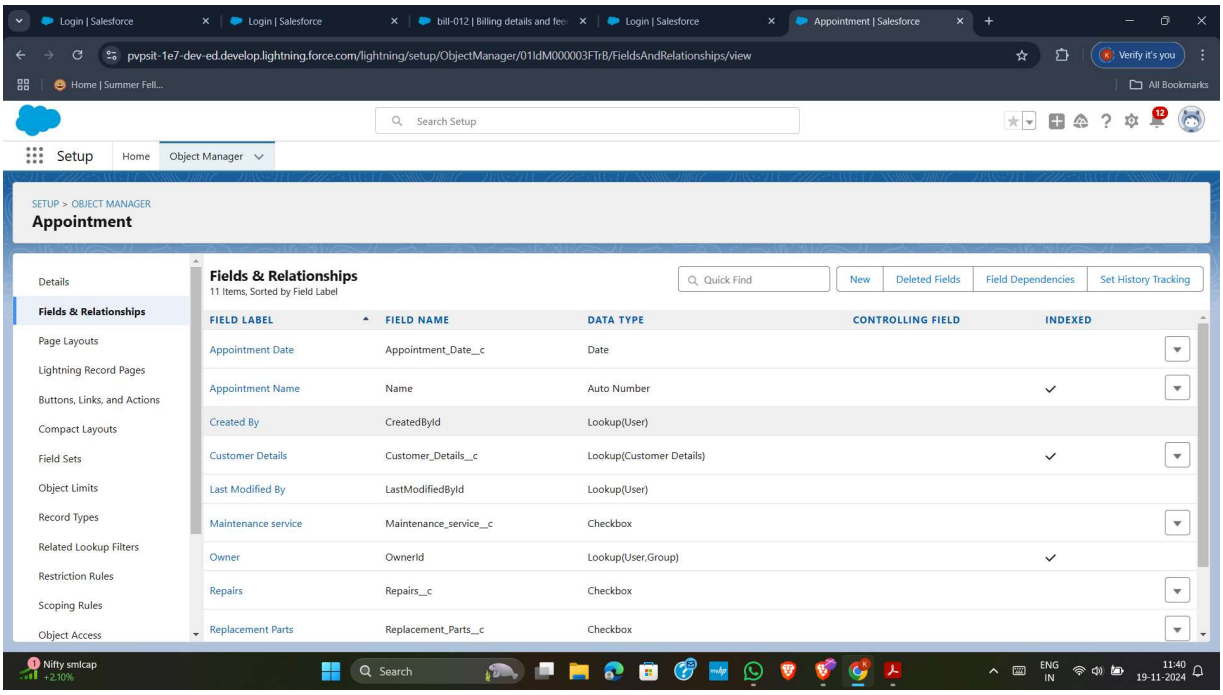
3. **Billing Details and Feedback Object:**
   - Follow the steps to create a lookup linking to *Service Records*.



Creating Checkbox Fields

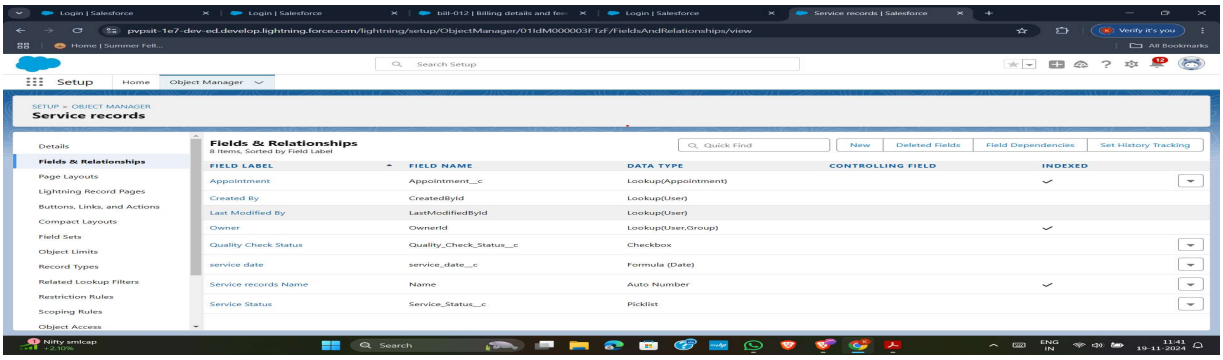
1. **Appointment Object:**
   - Create checkboxes with these labels:
     - *Maintenance Service*
     - *Repairs*
     - *Replacement Parts*

     Default: *Unchecked*.



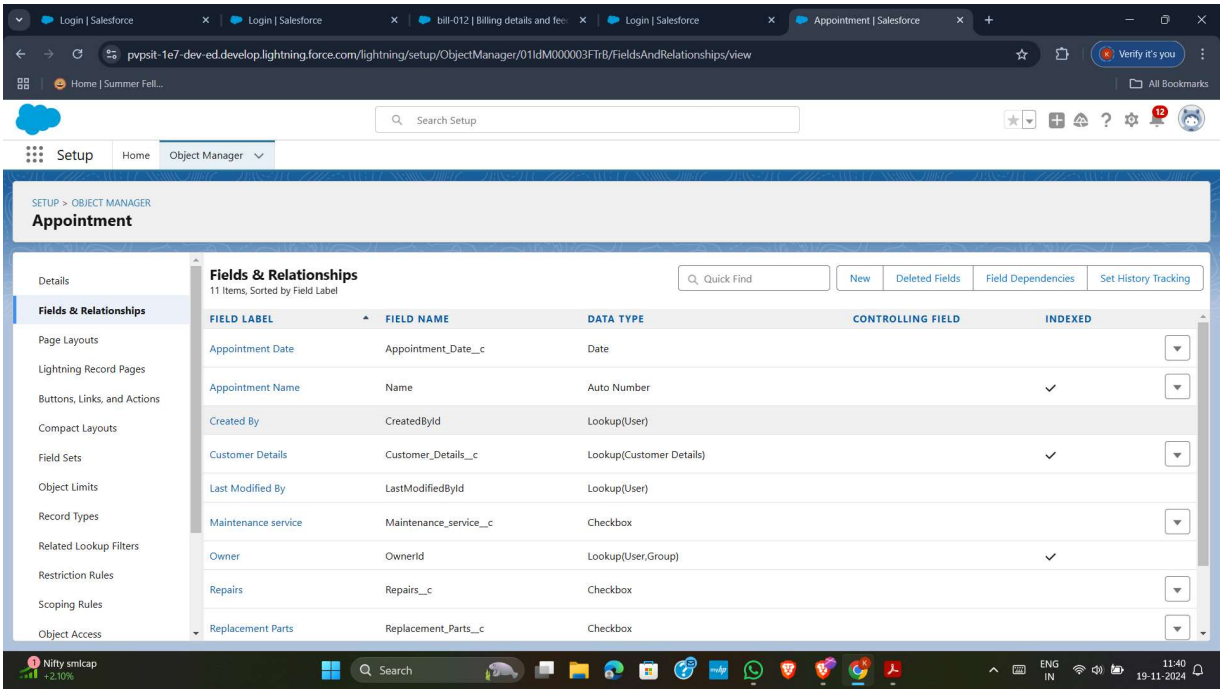
2. **Service Records Object:**
   - Create a checkbox: *Quality Check Status*.

     Default: *Unchecked*.

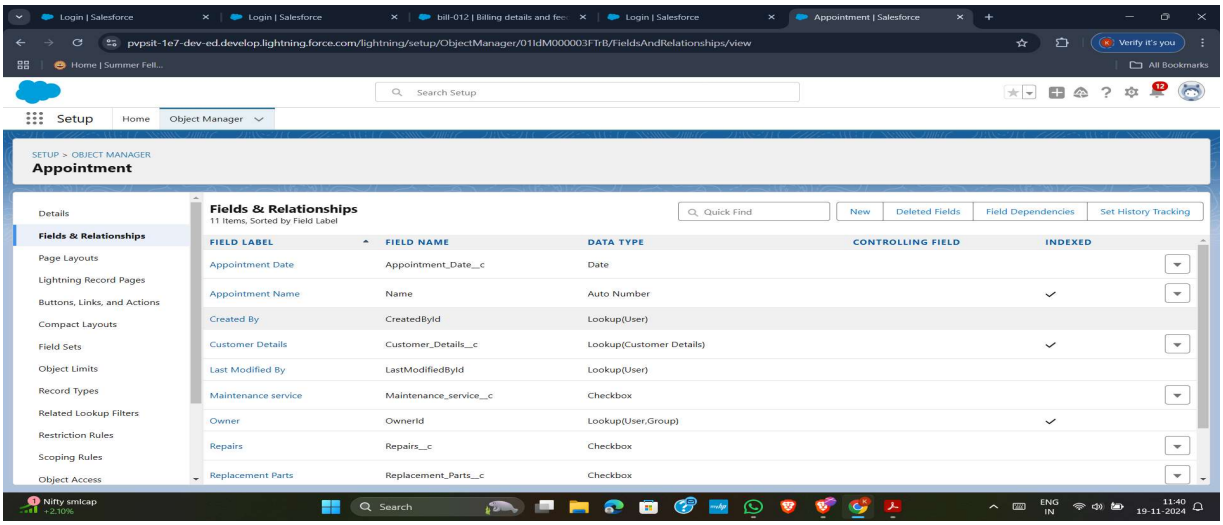


Creating Other Field Types

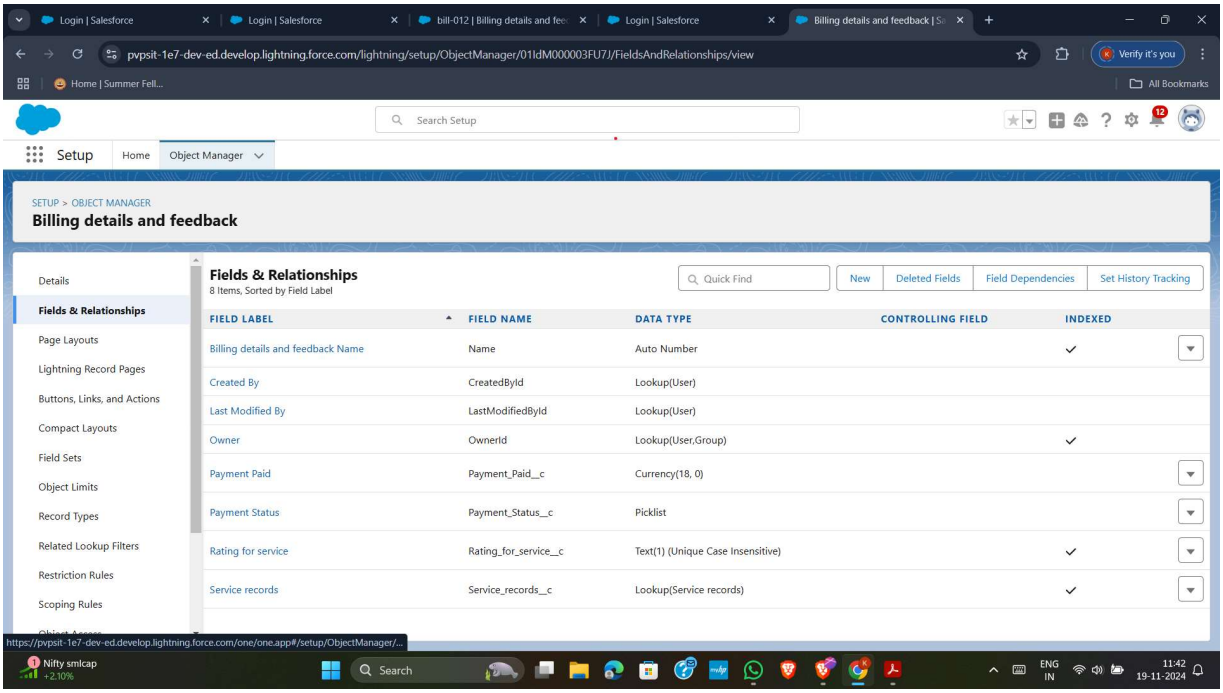
1. **Date Fields (Appointment Object):**
   - Create a *Date* field labeled *Appointment Date*. Make it *Required*.



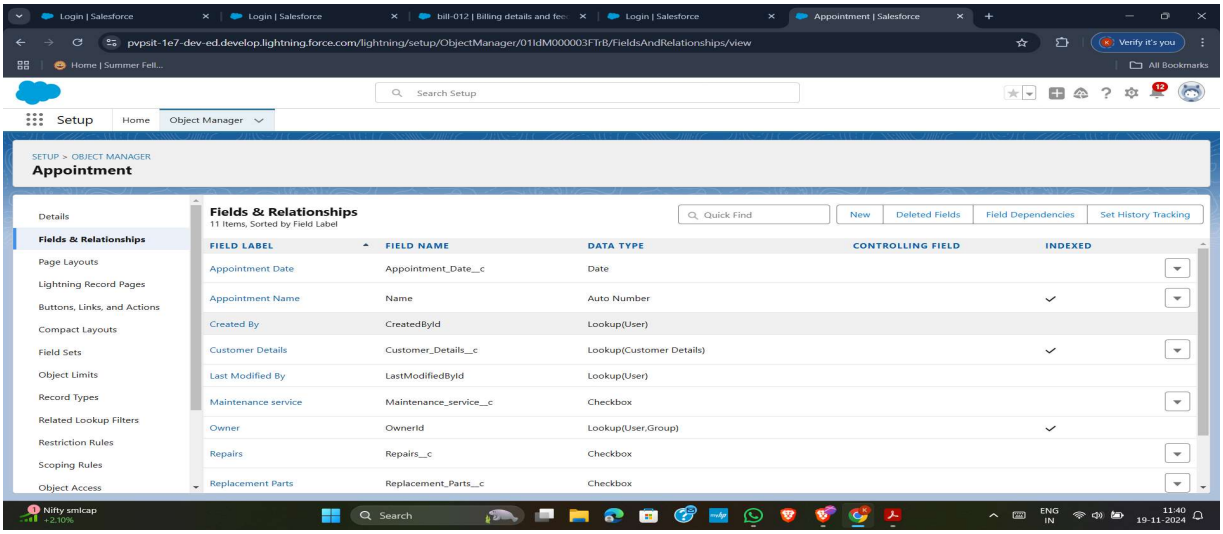
2. **Currency Fields:**
   - **Appointment:** Field label *Service Amount*, set Read-Only.
   - **Billing Details and Feedback:** Field label *Payment Paid*.



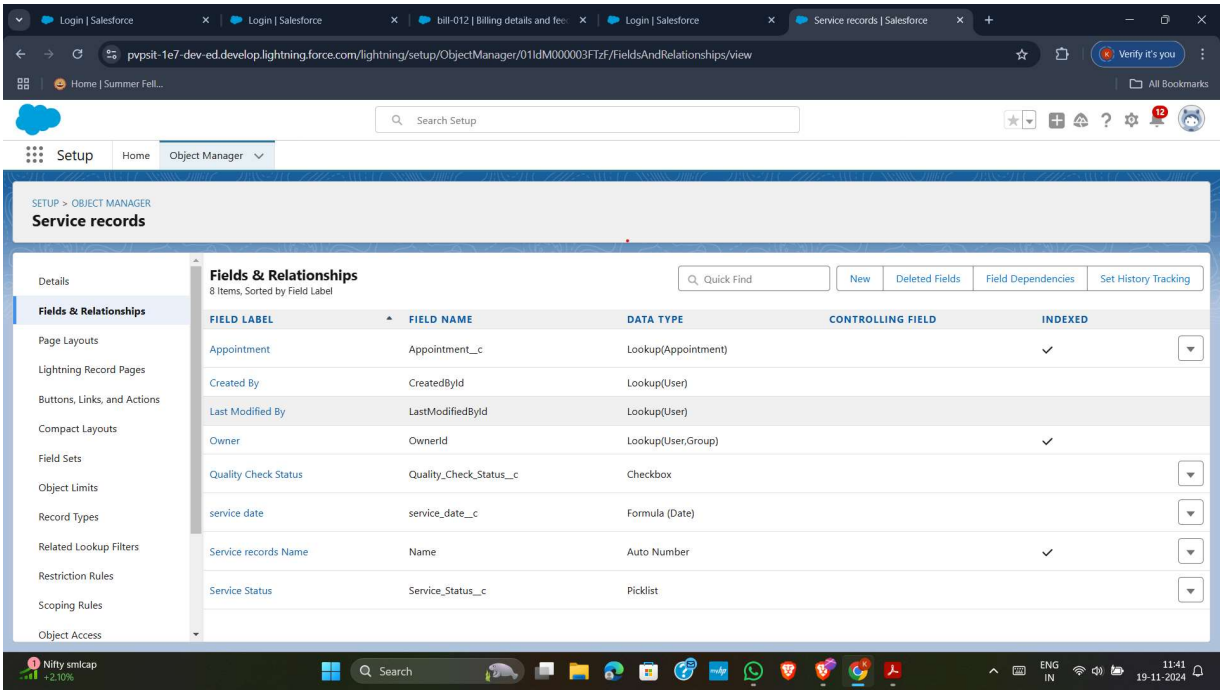
3. **Text Fields:**
   - **Appointment:***Vehicle Number Plate*, 10-char length, Required & Unique.
   - **Billing Details and Feedback:***Rating for Service*, 1-char length, Required & Unique.



4. **Picklist Fields:**
   - **Service Records:***Service Status* with values: *Started, Completed*.
   - **Billing Details and Feedback:***Payment Status* with values: *Pending, Completed*.

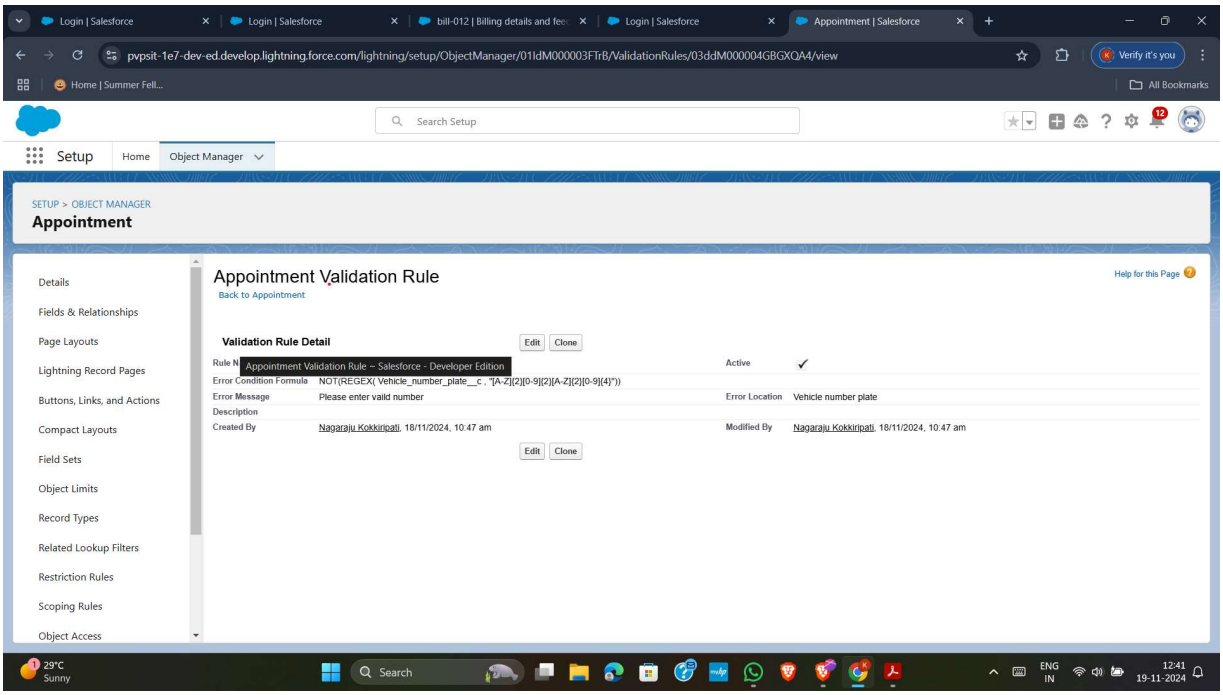


5. **Formula Field (Service Records):**
   - Label: *Service Date*, Type: *Date*. Formula: *CreatedDate*.

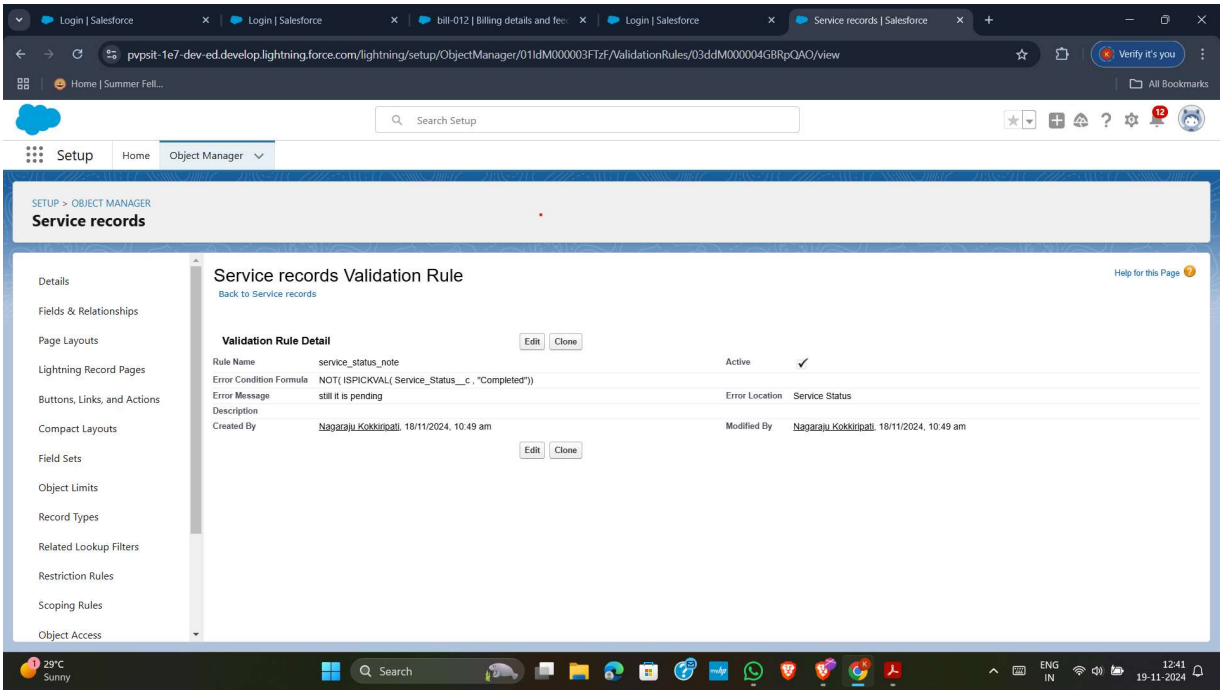


Validation rule

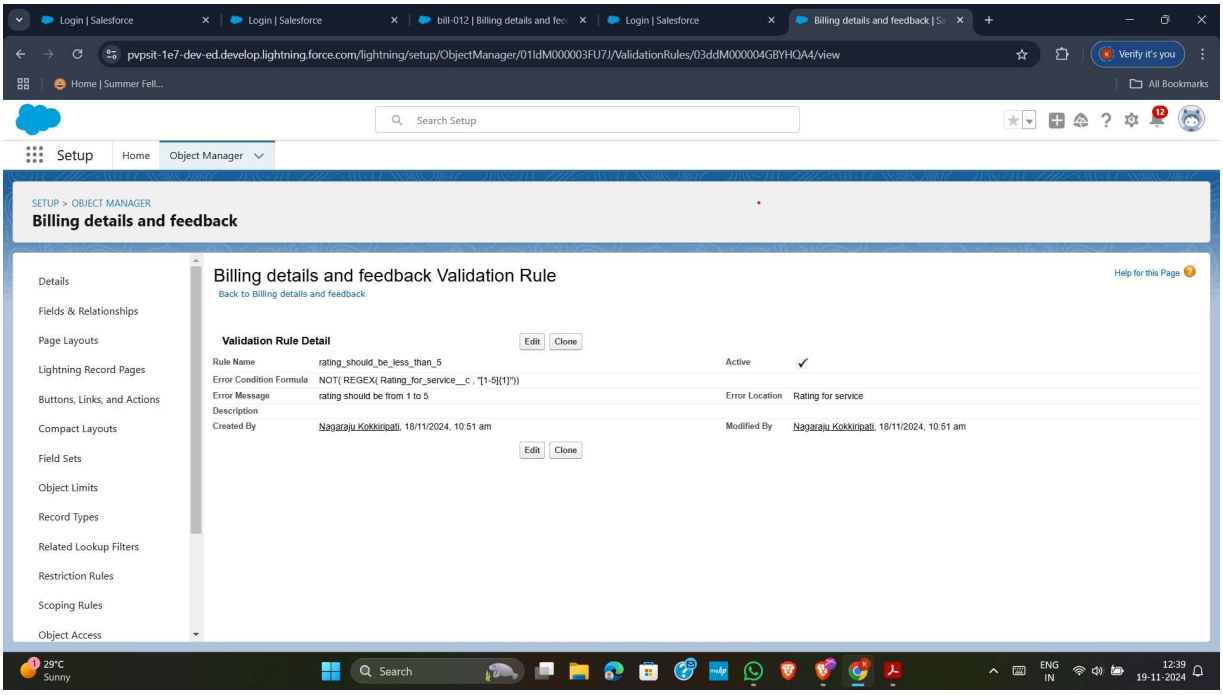
1. **Appointment Object:**
   - Rule: *Vehicle*.
     Formula:
     `NOT(REGEX(Vehicle_number_plate__c, "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))`
     Error: *Please enter a valid number.*



2. **Service Records Object:**
   - Rule: *Service Status Note*.
     Formula:
     `NOT(ISPICKVAL(Service_Status__c, "Completed"))`
     Error: *Still it is pending.*

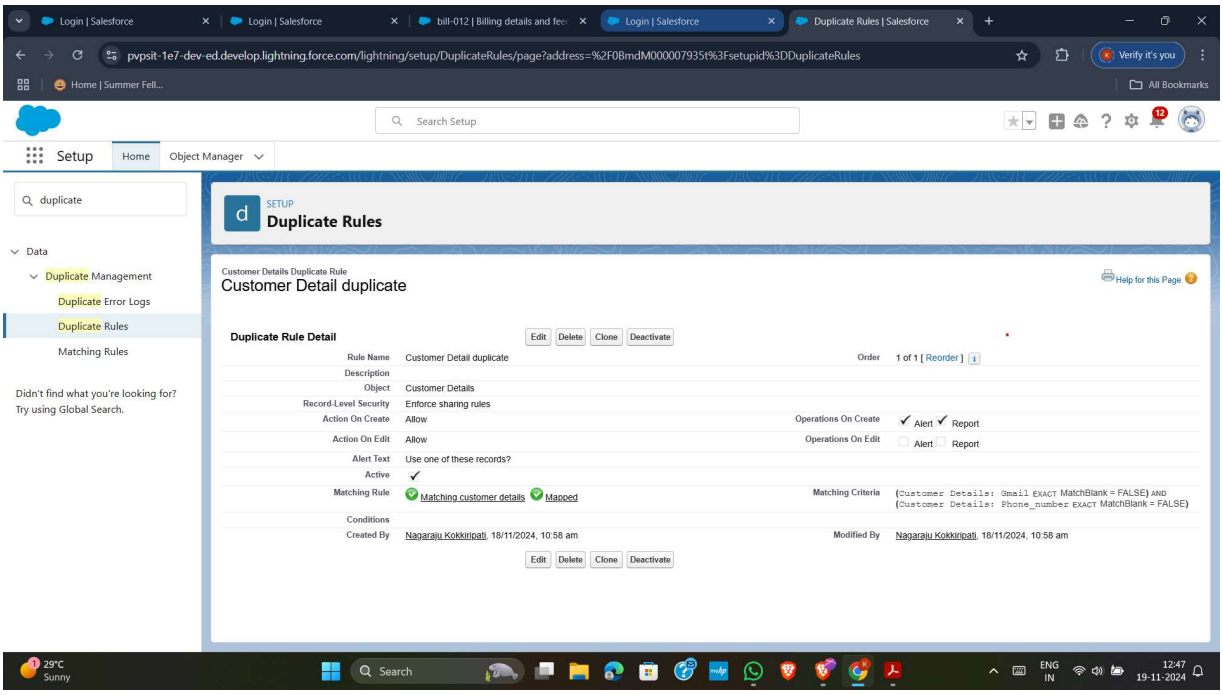


3. **Billing Details and Feedback Object:**
   - Rule: *Rating Should Be Less Than 5.*
     Formula:
     `NOT(REGEX(Rating_for_service__c, "[1-5]{1}"))`
     Error: *Rating should be from 1 to 5.*



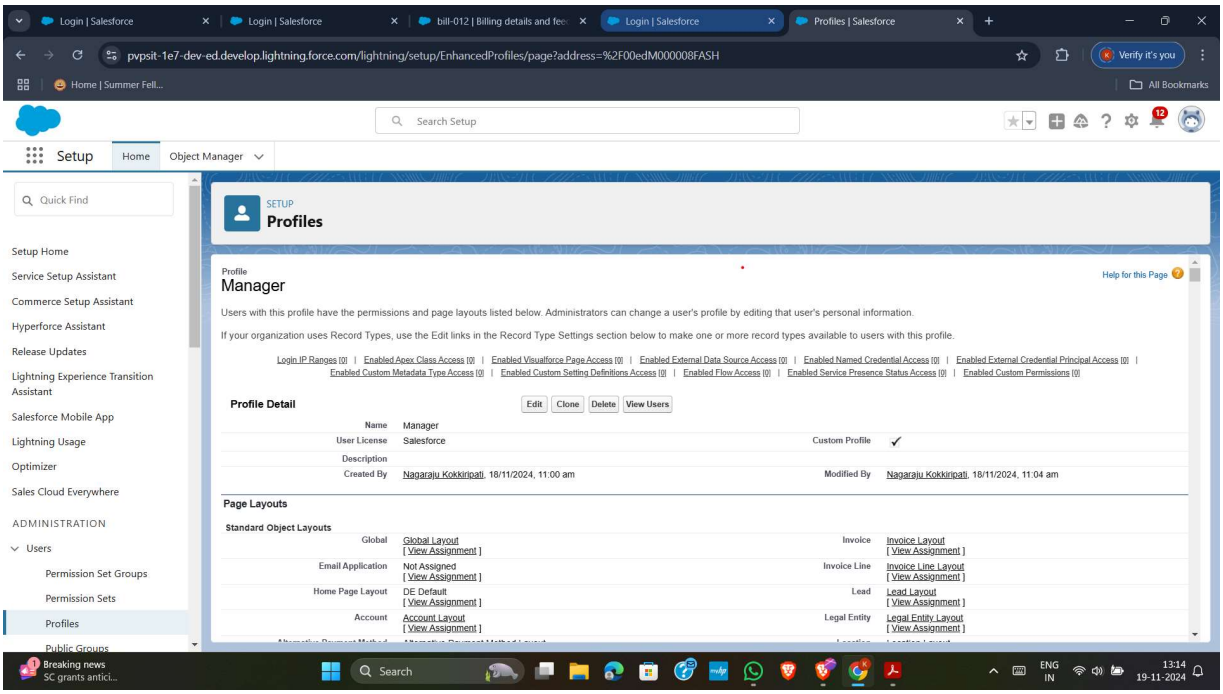
Duplicate rule

1. **Matching Rule for Customer Details**
   - **Path**: Setup > Matching Rules > New Rule.
   - **Details**:
     - Object: *Customer Details*.
     - Rule Name: *Matching Customer Details*.
     - Field Matching: Gmail (*Exact*), Phone Number (*Exact*).
   - **Save and Activate**.
2. **Duplicate Rule for Customer Details**
   - **Path**: Setup > Duplicate Rules > New Rule.
   - **Details**:
     - Object: *Customer Details*.
     - Rule Name: *Customer Detail Duplicate*.
     - Matching Rule: *Matching Customer Details*.
   - **Save and Activate**.

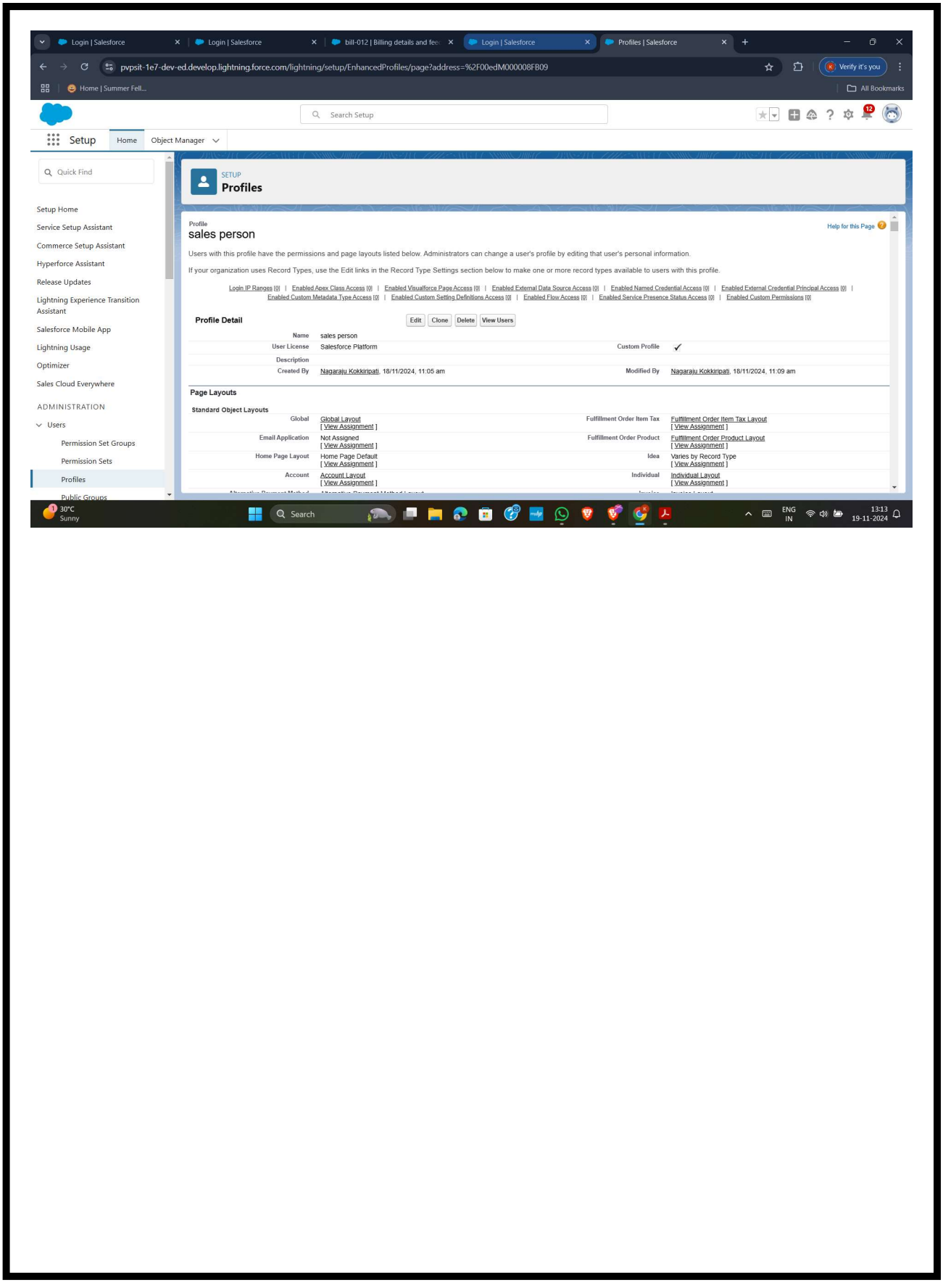


Profiles

1. **Manager Profile**
   - Clone *Standard User*, rename to *Manager*.
   - Set default app to *Garage Management*.
   - Grant access to custom objects: *Appointments*, *Billing Details and Feedback*, *Service Records*, *Customer Details*.
   - Configure:
     - *Session Timeout*: 8 hours.
     - *Password Expiry*: Never.
     - *Min Password Length*: 8.
   - **Save**.



2. **Salesperson Profile**
   - Clone *Salesforce Platform User*, rename to *Salesperson*.
   - Assign similar object permissions as above.
   - **Save**.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Object Manager
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Setup Home
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Commerce Setup Assistant
Hyperforce Assistant
Release Updates
Lightning Experience Transition Assistant
Salesforce Mobile App
Lightning Usage
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sales person
Help for this Page
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
sales person
User License
Salesforce Platform
Custom Profile
Description
Created By
Nagaraju Kokkiripati, 18/11/2024, 11:05 am
Modified By
Nagaraju Kokkiripati, 18/11/2024, 11:09 am
Page Layouts
Standard Object Layouts
Global
Global Layout
[View Assignment]
Email Application
Not Assigned
[View Assignment]
Home Page Layout
Home Page Default
[View Assignment]
Account
Account Layout
[View Assignment]
Fulfillment Order Item Tax
Fulfillment Order Item Tax Layout
[View Assignment]
Fulfillment Order Product
Fulfillment Order Product Layout
[View Assignment]
Idea
Varies by Record Type
[View Assignment]
Individual
Individual Layout
[View Assignment]
30°C
Sunny
Search
ENG
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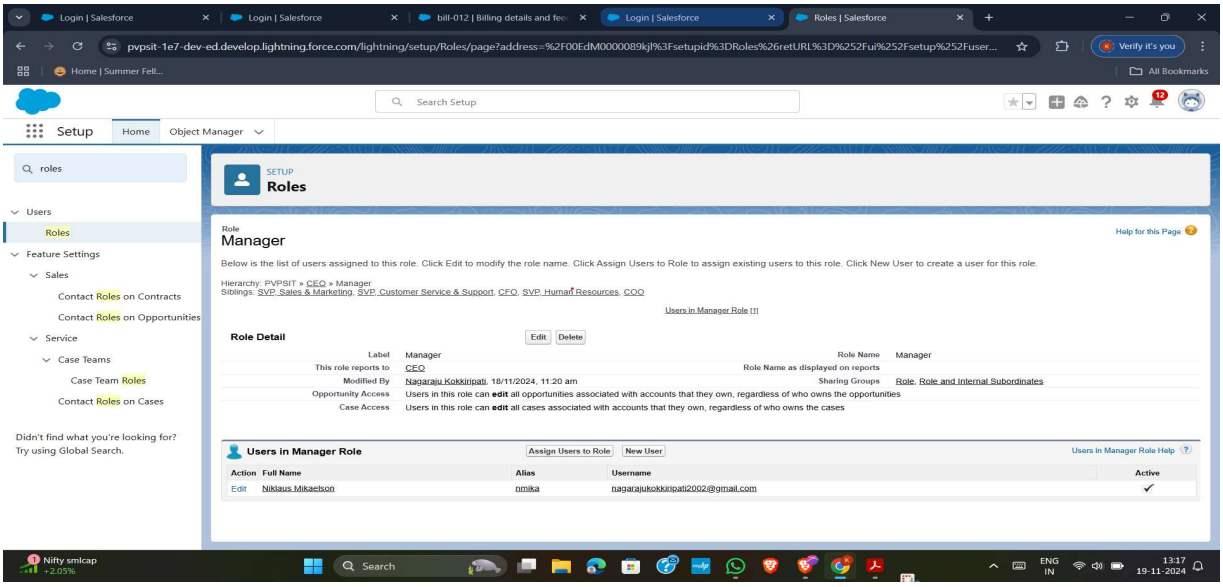
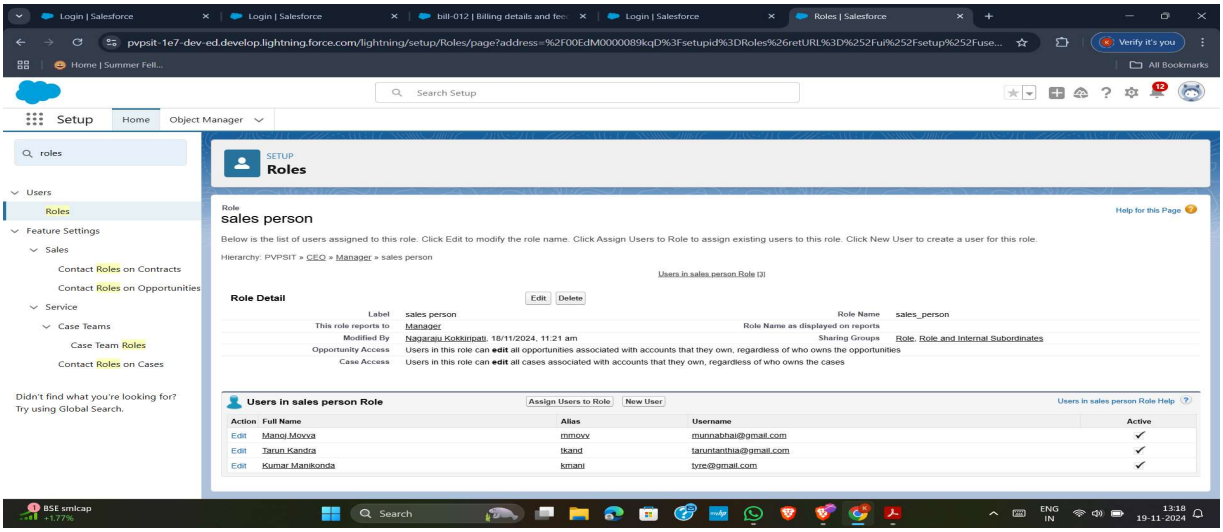
13:13
19-11-2024

Role & Role Hierarchy

- **Manager Role**
  - Path: *Setup > Roles > Set Up Roles*.
  - Add a new role under the relevant position, name it *Manager*.
  - **Save**.

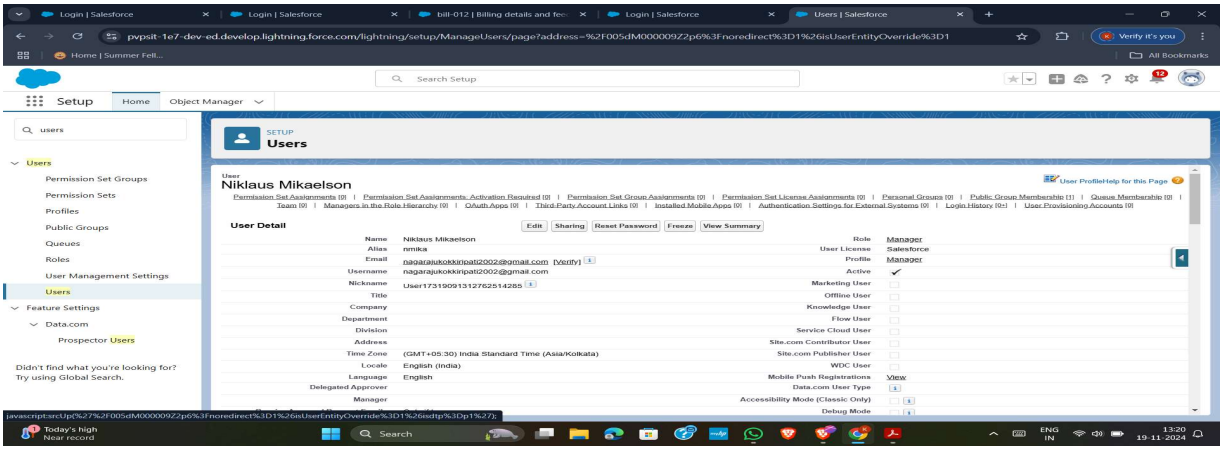


- **Salesperson Role**
  - Add a role under *Manager*, name it *Salesperson*.
  - **Save**.

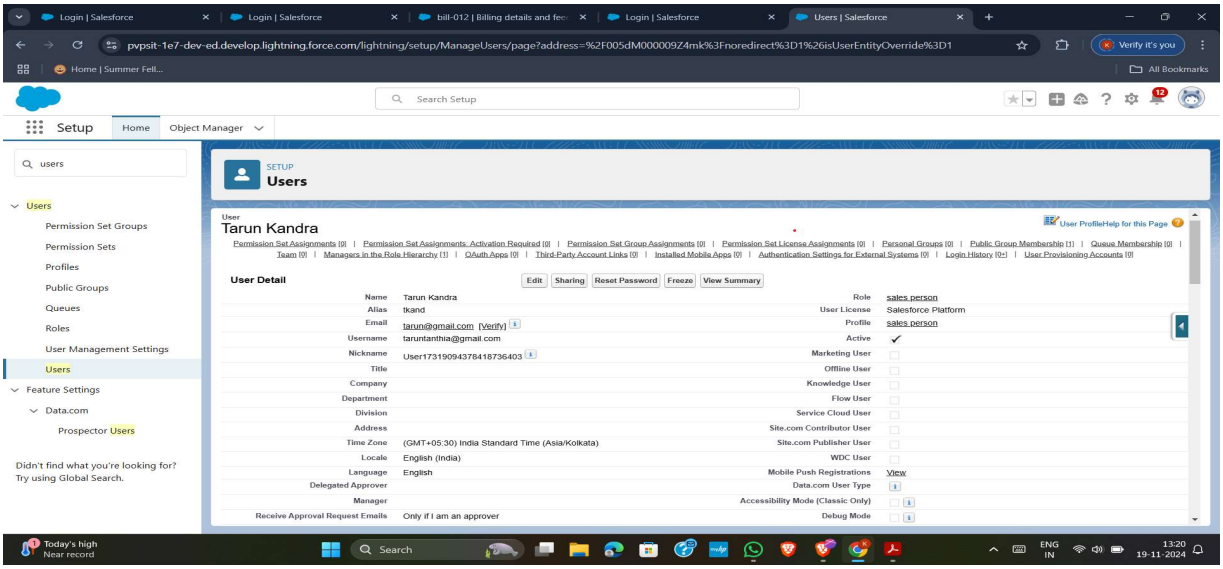


Users

1. **Create a Manager User**
   - Path: *Setup > Users > New User*.
   - Details:
     - **Name**: Niklaus Mikaelson.
     - **Role**: Manager.
     - **Profile**: Manager.
   - **Save**.

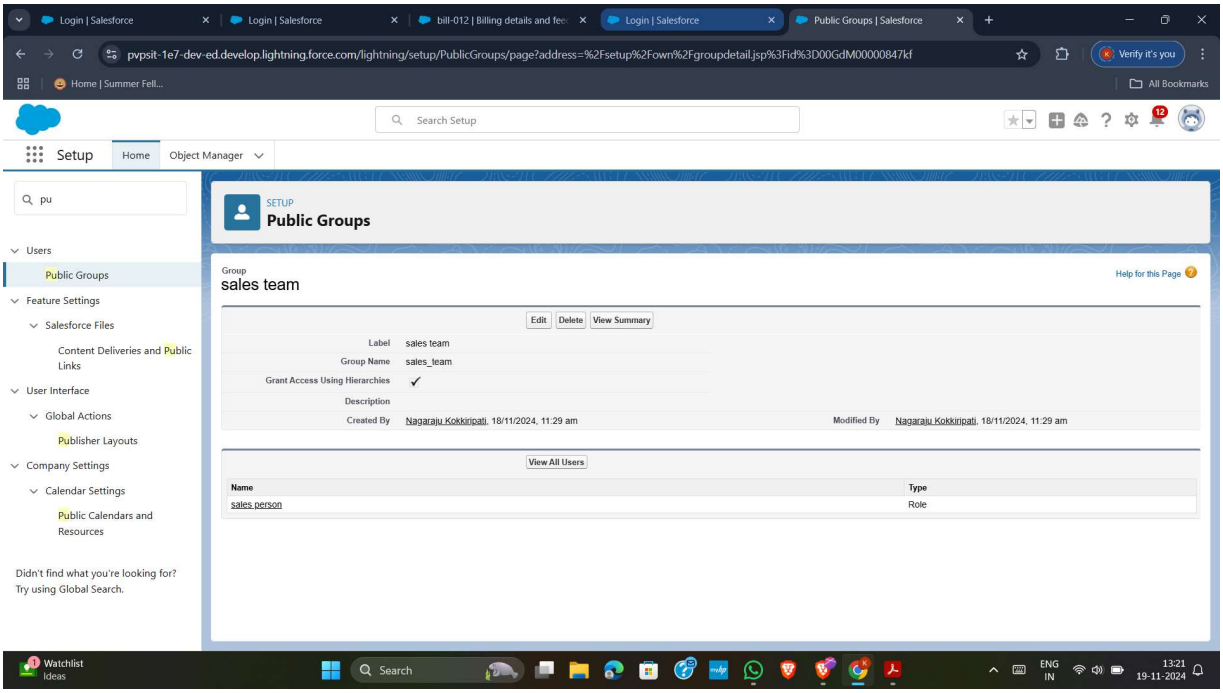


2. **Create Salesperson Users**
   - Repeat steps to create at least 3 users:
     - **Role**: Salesperson.
     - **Profile**: Salesperson.



Public Groups

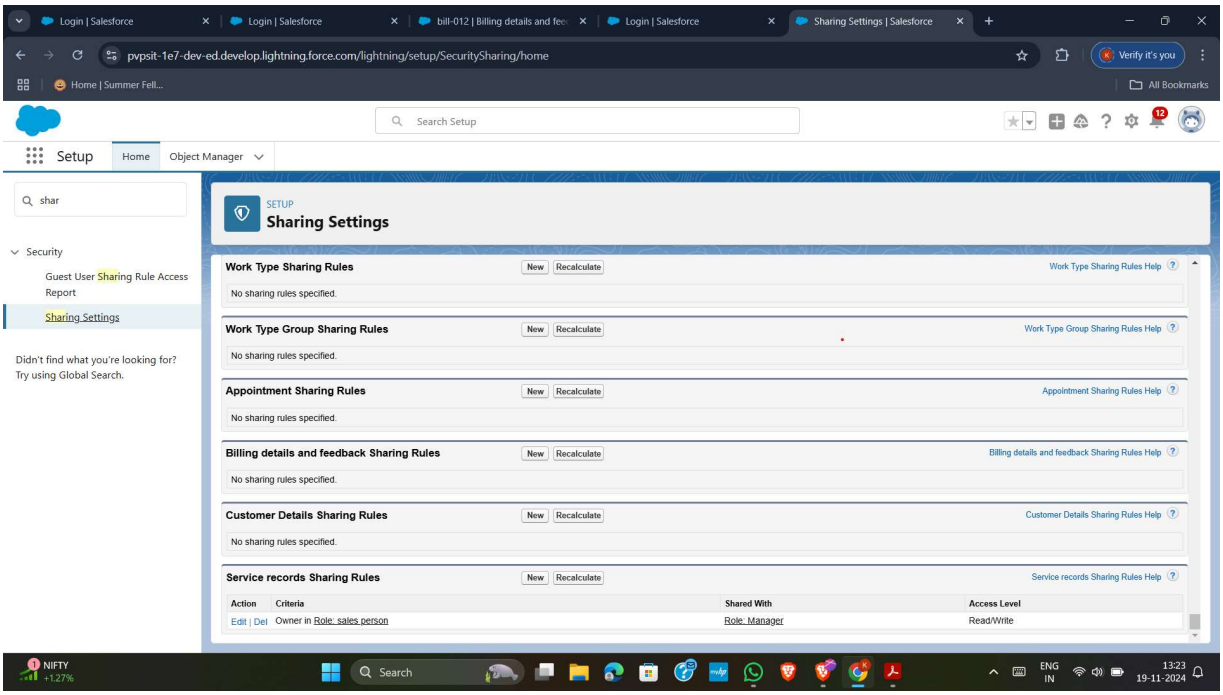
1. **Sales Team Group**
   - Path: *Setup > Public Groups > New*.
   - Name: *Sales Team*.
   - Add members with the *Salesperson* role.
   - **Save**.



Sharing Setting

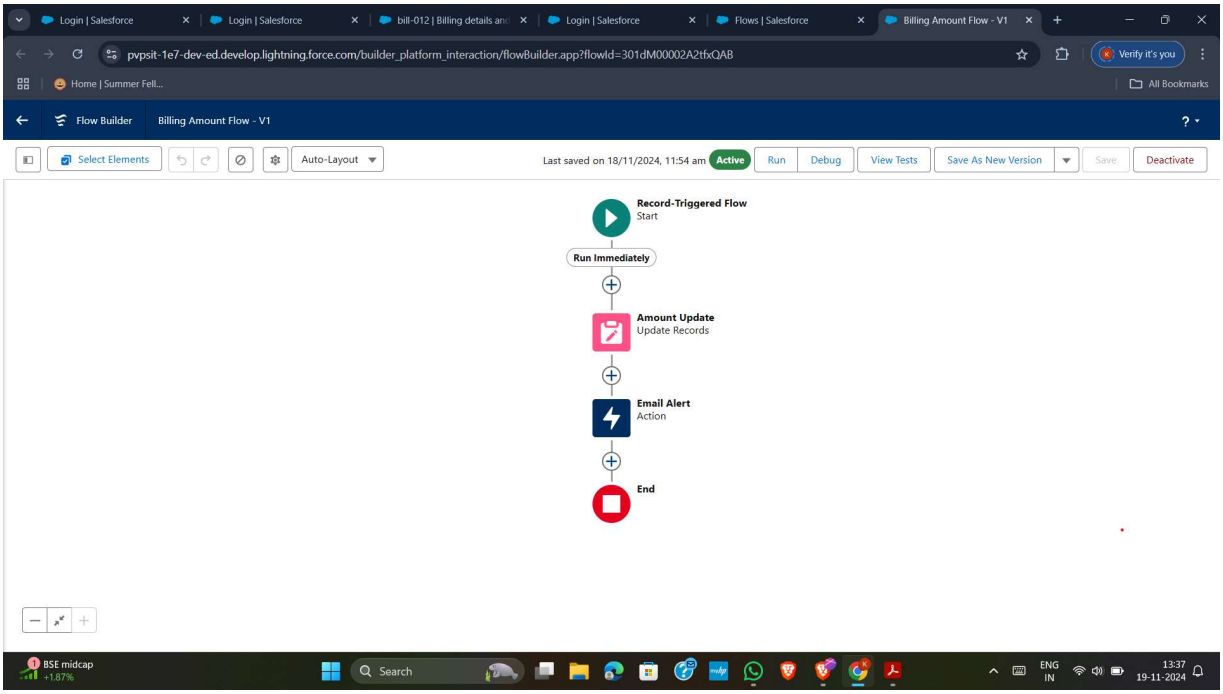
Configuration

- Path: *Setup > Sharing Settings > Edit*.
- Set *Service Records Object* to *Private*.
- Create Sharing Rule:
  - **Label**: Sharing Setting.
  - **Records to Share**: Roles > Salesperson.
  - **Share With**: Roles > Manager.
  - **Access Level**: Read/Write.
- **Save**.



Flows

- **Record-Triggered Flow**
  - Path: *Setup > Flows > New Flow*.
  - Type: *Record-Triggered Flow*.
  - Object: *Billing Details and Feedback*.
  - Trigger: *Record Created or Updated*.
  - Optimize: *Actions and Related Records*.
- **Add Elements**:
  - **Update Records**:
    - Label: *Amount Update*.
    - Filter: Payment_Status = *Completed*.
    - Field to Update: *Payment_Paid* = `{!$Record.Service_records__r.Appointment__r.Service_Amount__c}`.
  - **Email Alert**:
    - Recipient: `{!$Record.Service_records__r.Appointment__r.Customer_Name__r.Gmail__c}`.
    - Subject: *Thank You for Your Payment - Garage Management*.



Apex Trigger

Definition:
Apex triggers execute custom logic before or after database operations, like insert, update, or delete.

- **Before Triggers**: Used to validate or update record values before saving them.
- **After Triggers**: Used to access system-set values (e.g., record IDs) or modify related records.

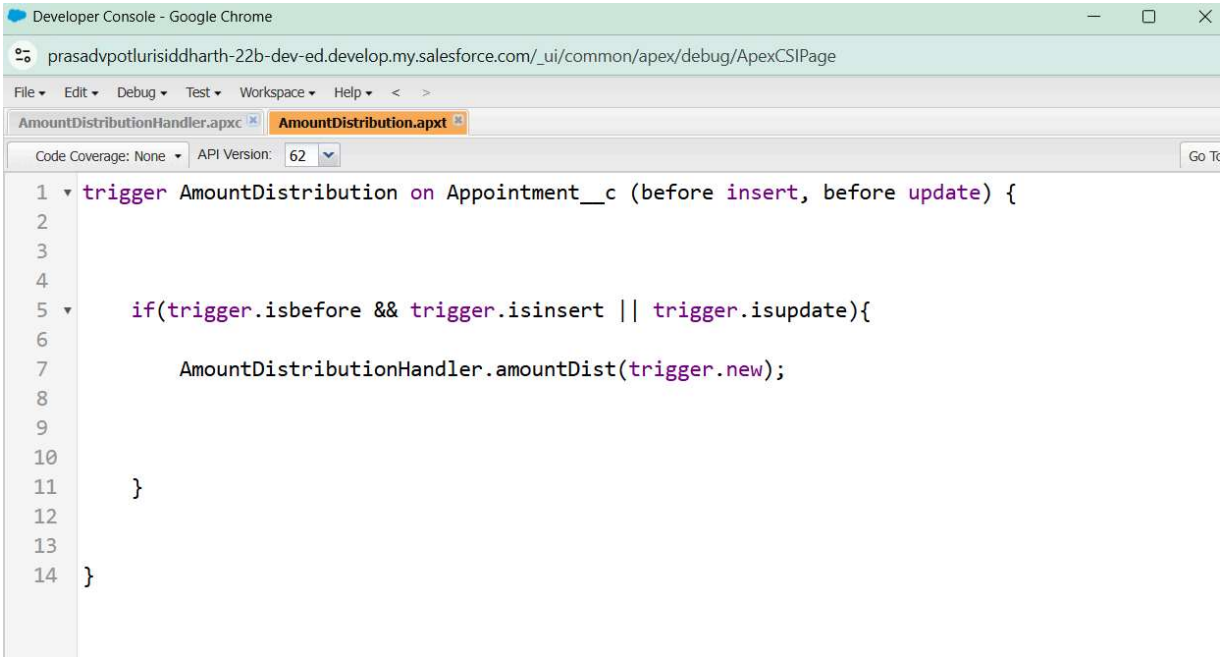
Trigger Example

1. **Handler Class**:
2. apex
3. Copy code

```apex
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){
```

```apex
            }
            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;
            }

    }
    }
}
```

4.
```
public class AmountDistributionHandler {
    public static void amountDist(List<Appointment__c> listApp) {
        for (Appointment__c app : listApp) {
            if (app.Maintenance_service__c && app.Repairs__c &&
app.Replacement_Parts__c) {
                app.Service_Amount__c = 10000;
            }
            // Additional conditions can be added here.
        }
    }
}
```
5. **Trigger**:
6. apex



7. Copy code
8.
```
trigger AmountDistribution on Appointment__c (before insert,
before update) {
    if (trigger.isBefore && (trigger.isInsert ||
trigger.isUpdate)) {
        AmountDistributionHandler.amountDist(trigger.new);
    }
}
```

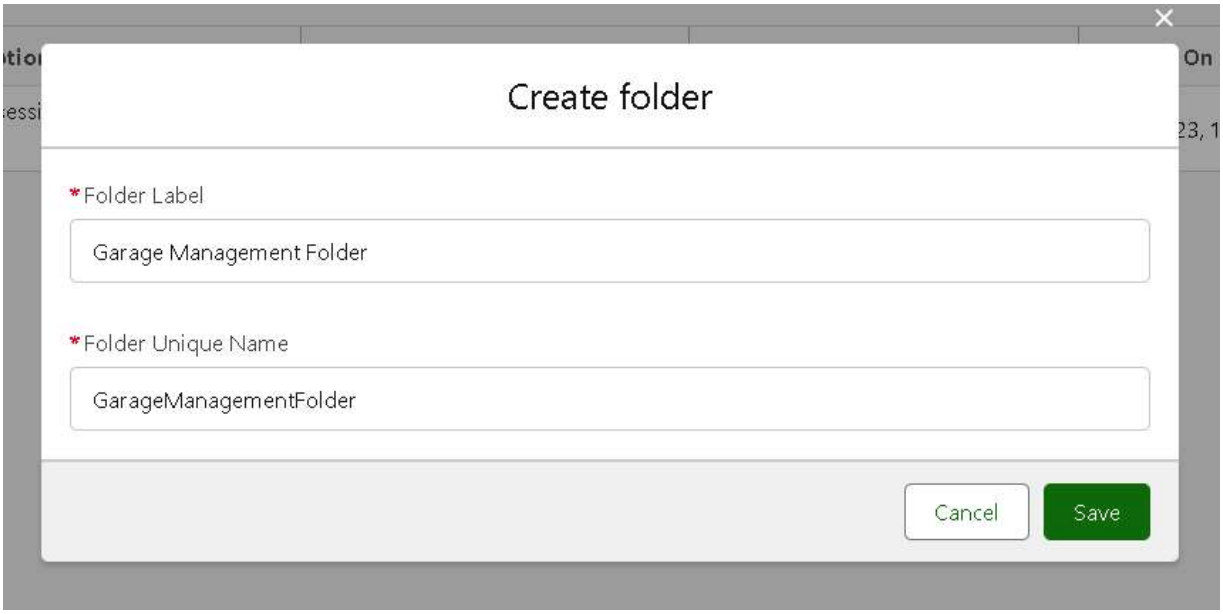
Reports

Types of Reports

1. **Tabular Reports**: Simple data in rows and columns.
2. **Summary Reports**: Grouped data with subtotals.
3. **Matrix Reports**: Data summarized in rows and columns.
4. **Joined Reports**: Compare data from multiple report types.

Steps to Create a Report Folder

1. Navigate to *Reports Tab* > Click *New Folder*.
2. Name: *Garage Management Folder*.
3. Save the folder.

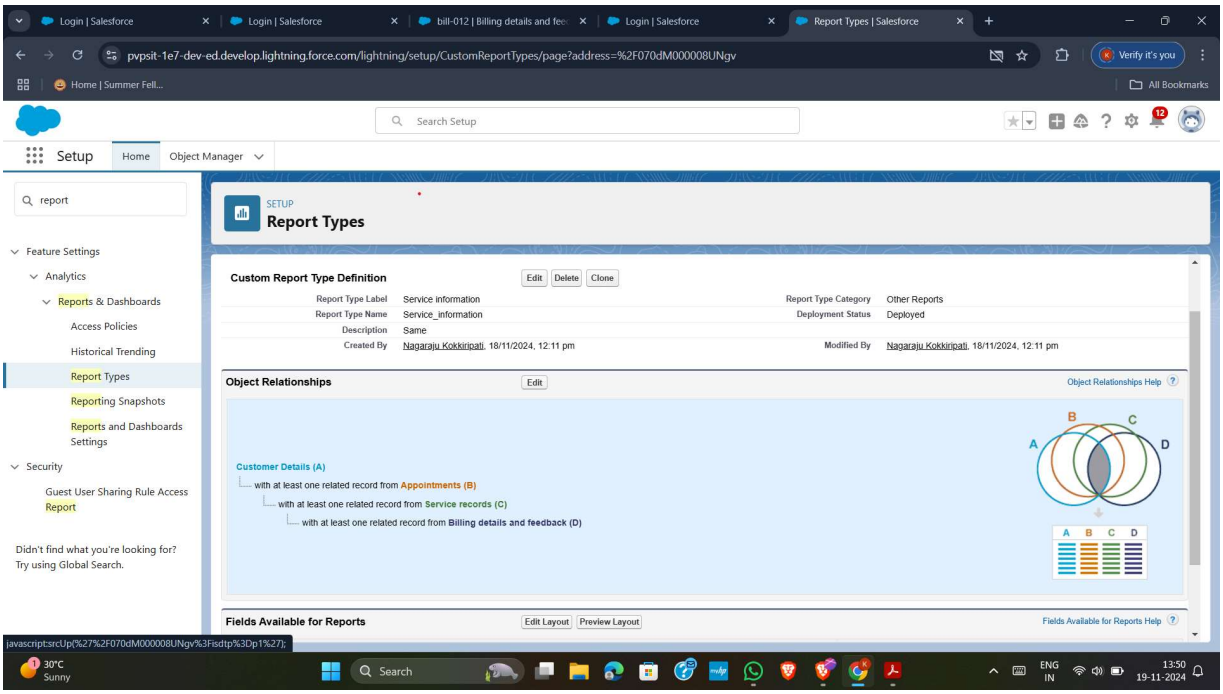


Sharing a Report Folder

1. In *All Folders*, locate *Garage Management Folder*.
2. Click *Share*, choose *Roles*, and set the access level to *View* for the *Manager* role.
3. Save the settings.

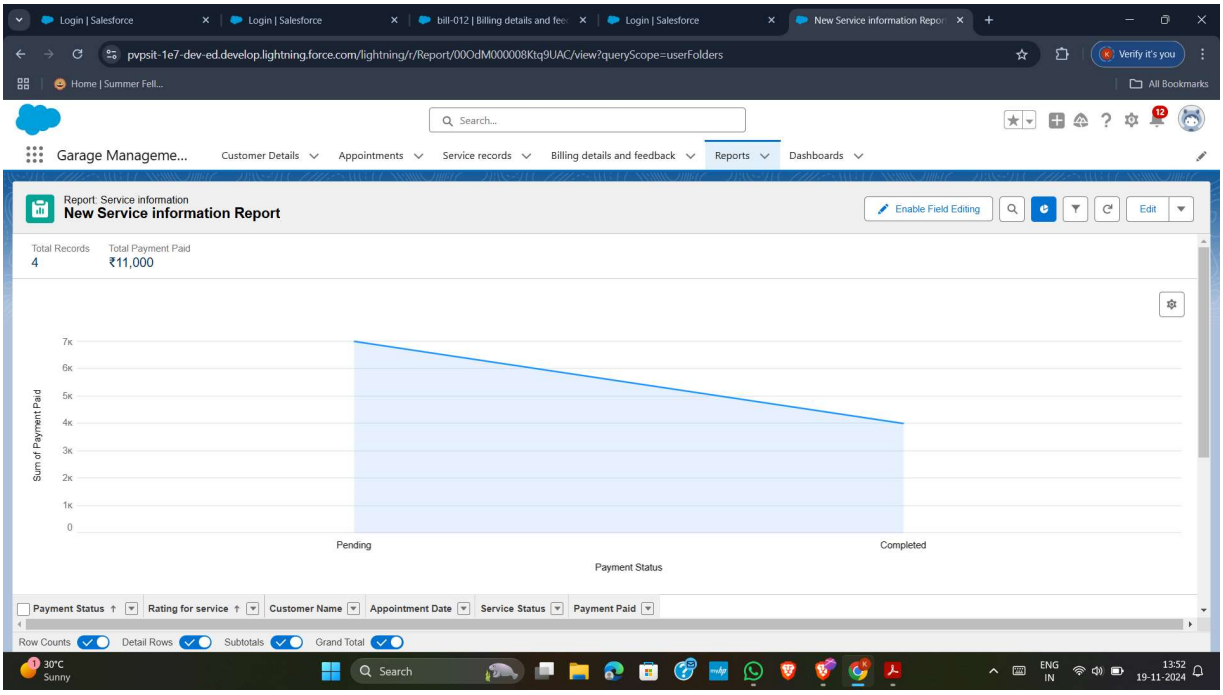
Creating a Custom Report Type

1. Go to *Setup > Report Types > New Custom Report Type*.
2. Set Primary Object: *Customer Details*.
3. Details:
   - **Label**: *Service Information*.
   - Add related objects: *Appointment*, *Service Records*, *Billing Details and Feedback*.
4. Deploy and Save



Steps to Create a Report

1. Navigate to *Reports Tab* > Click *New Report*.
2. Select Category: *Other Reports*, then choose *Service Information*.
3. Add columns:
   - *Customer Name*, *Appointment Date*, *Service Status*, *Payment Paid*.
4. Group rows by:
   - *Rating for Service*, *Payment Status*.
5. Add a *Line Chart*.
6. Save the report as *New Service Information Report* in the *Garage Management Folder*.


Login | Salesforce
Login | Salesforce
bill-012 | Billing details and fee
Login | Salesforce
New Service information Repor
pvpsit-1e7-dev-ed.develop.lightning.force.com/lightning/r/Report/00OdM000008Ktq9UAC/view?queryScope=userFolders
Verify it's you
Home | Summer Fell...
All Bookmarks
Search...
Garage Manageme...
Customer Details
Appointments
Service records
Billing details and feedback
Reports
Dashboards
Report: Service information
New Service information Report
Enable Field Editing
Edit
Total Records
4
Total Payment Paid
₹11,000
7K
6K
5K
4K
3K
2K
1K
0
Sum of Payment Paid
Pending
Completed
Payment Status
Payment Status
Rating for service
Customer Name
Appointment Date
Service Status
Payment Paid
Row Counts
Detail Rows
Subtotals
Grand Total
30°C
Sunny
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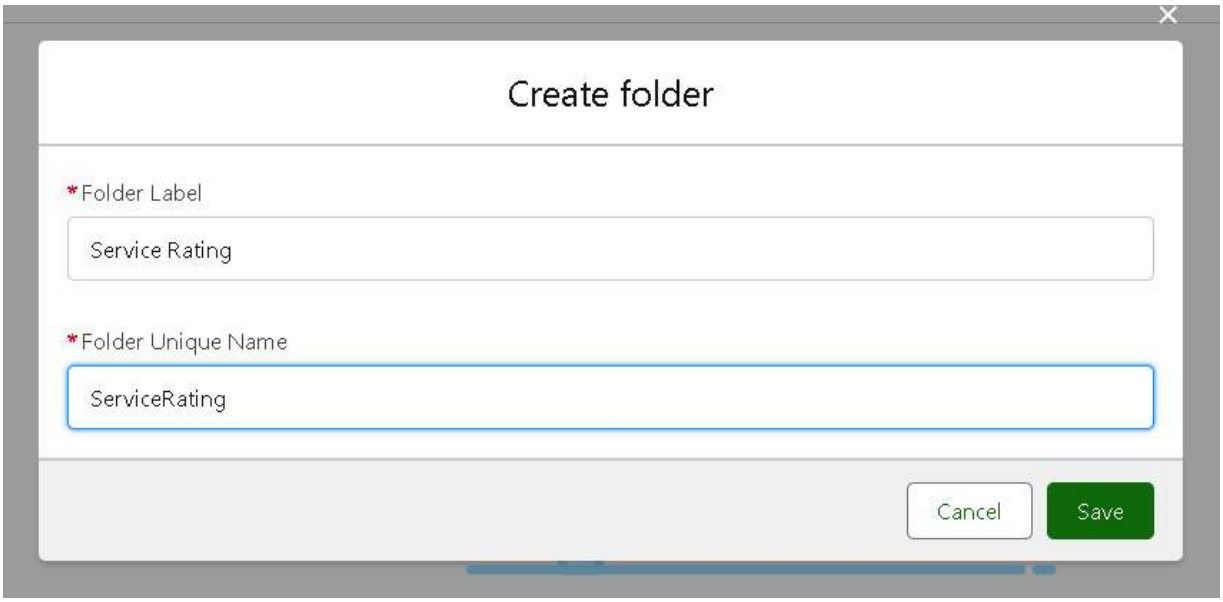
19-11-2024

Dashboards

Creating a Dashboard Folder

1. Go to *Dashboards Tab* > Click *New Folder*.
2. Name: *Service Rating Dashboard*.
3. Save the folder.

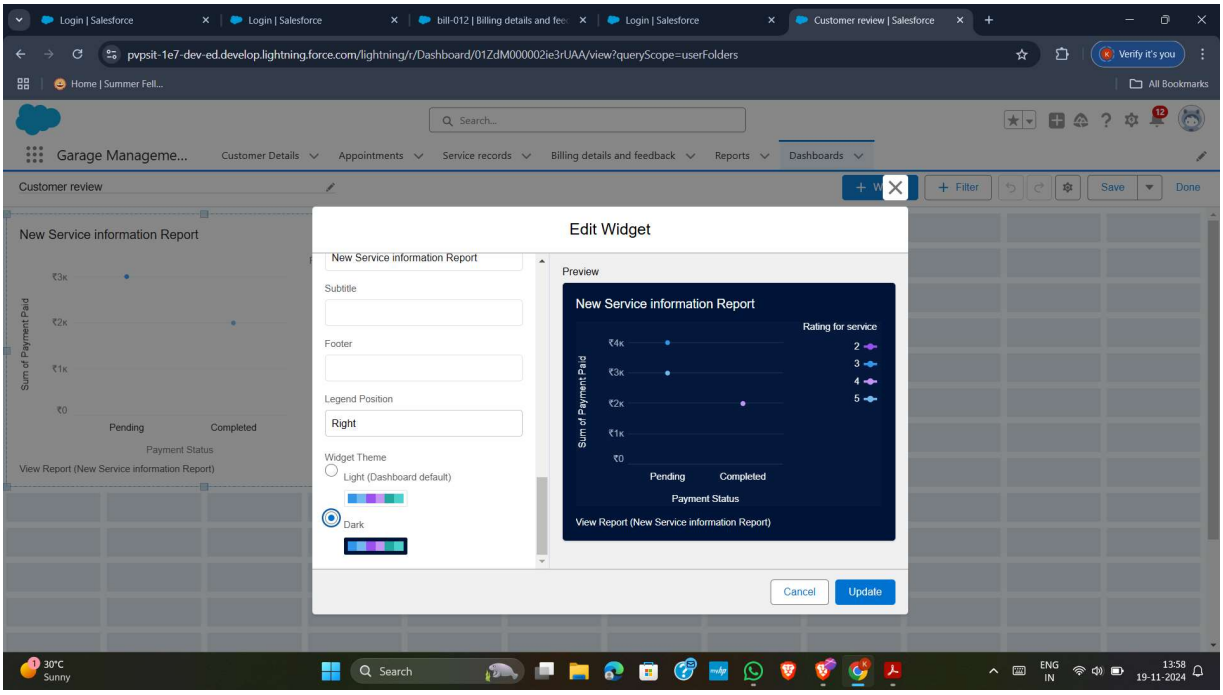


Sharing a Dashboard Folder

- Follow the steps for sharing the *Garage Management Folder*.

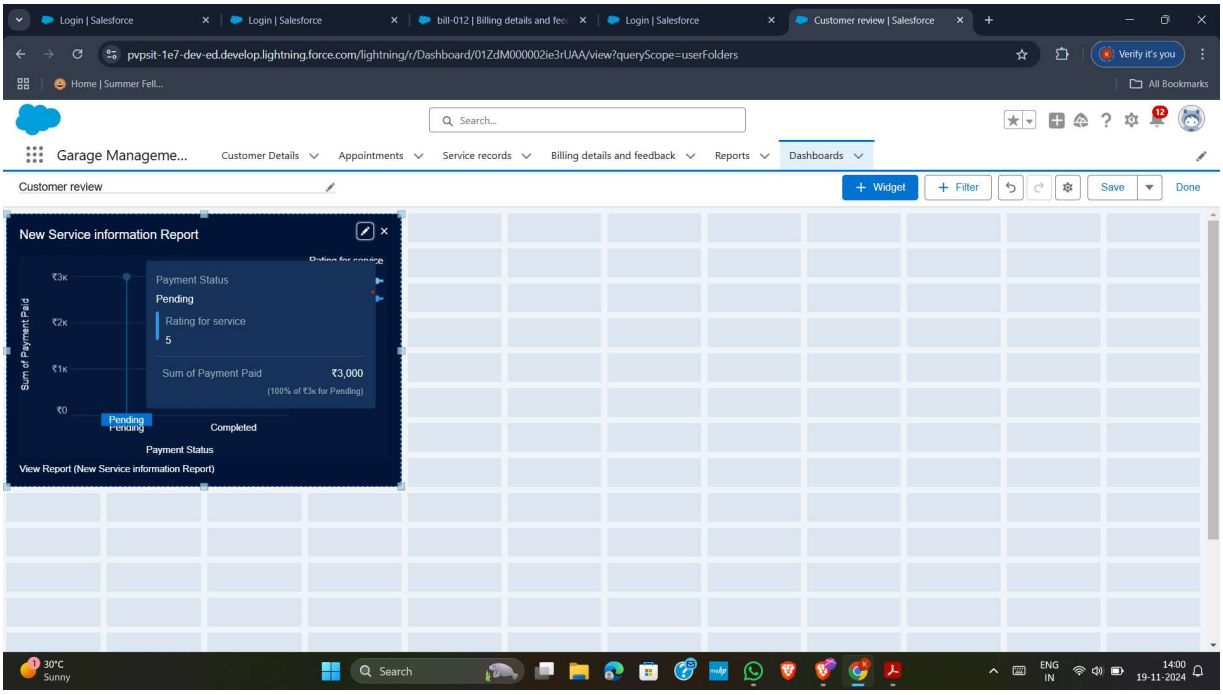
Steps to Create a Dashboard

1. Navigate to *Dashboards Tab* > Click *Create New Dashboard*.
2. Provide:
   - **Name**: Your custom name.
   - **Folder**: *Service Rating Dashboard*.
3. Add a component:
   - Select a report (e.g., *New Service Information Report*).
   - Choose *Line Chart* and adjust the theme.
4. Save the dashboard.



Subscribing to a Dashboard

1. Click *Subscribe* on the dashboard.
2. Set:
   - **Frequency**: Weekly.
   - **Day**: Monday.
3. Save the subscription.


Login | Salesforce
Login | Salesforce
bill-012 | Billing details and fee
Login | Salesforce
Customer review | Salesforce
pvpsit-1e7-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01ZdM000002ie3rUAA/view?queryScope=userFolders
Verify it's you
Home | Summer Fell...
All Bookmarks
Search...
Garage Manageme...
Customer Details
Appointments
Service records
Billing details and feedback
Reports
Dashboards
Customer review
+ Widget
+ Filter
Save
Done
New Service information Report
Payment Status
Pending
Rating for service
5
Sum of Payment Paid
₹3,000
(100% of ₹3k for Pending)
Sum of Payment Paid
₹3k
₹2k
₹1k
₹0
Pending
Completed
Payment Status
View Report (New Service information Report)
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19-11-2024