GARAGE MANAGEMENT SYSTEM

Project Abstraction

The Garage Management System is a web-based tool designed to manage and track all garage operations. The system aims to provide a centralized platform for garage owners to monitor and control their business activities, including employee management, inventory tracking, and customer service.

The system is built on the Salesforce platform, which provides a robust and secure infrastructure for managing and storing data. The Salesforce platform also offers a wide range of tools and features that can be used to customize and extend the system to meet the specific needs of the garage business.

One of the key features of the Garage Management System is its employee management module. This module allows garage owners to keep track of all their employees, including their contact information, work schedules, and job assignments. The system also provides tools for managing employee performance, such as tracking attendance and evaluating performance.

The Garage Management System also includes a customer service module, which allows garage owners to keep track of all their customers and their interactions with the garage. The system provides tools for managing customer information, such as contact details and service history, as well as tools for scheduling appointments and tracking customer feedback.

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INTRODUCTION

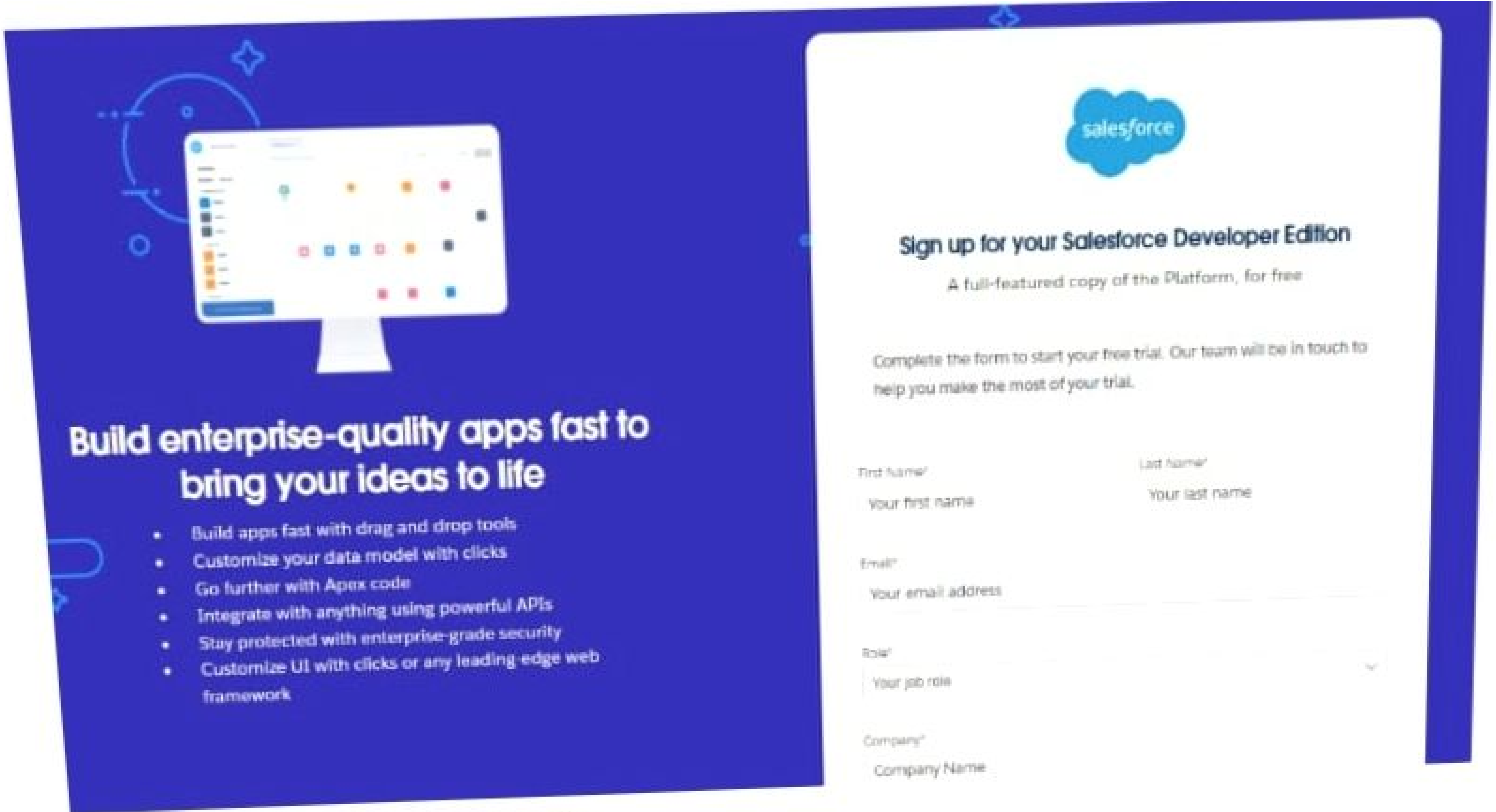
The Garage Management System is a comprehensive solution designed to optimize the usage of vehicles and trailers that carry inventories to stores. The system aims to streamline the management of vehicle records, track vehicles, and ensure efficient inventory transportation. The Garage Management System will be built on the Salesforce platform, leveraging its robust architecture and scalability. The system will consist of several components, including vehicle records, inventory management, workflow automation, and integration with other Salesforce modules. The implementation strategy will involve requirements gathering, design, development, testing, and deployment. The abstraction framework for the system will use an Integration Procedure to get input from a workflow, query the product model based on that input, and update products, attributes, and inventory levels. The Garage Management System will provide a flexible and scalable architecture for managing and optimizing inventor y transpor tation, ensuring efficient vehicle utilization, and automating business processes.

TASK 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 :

1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

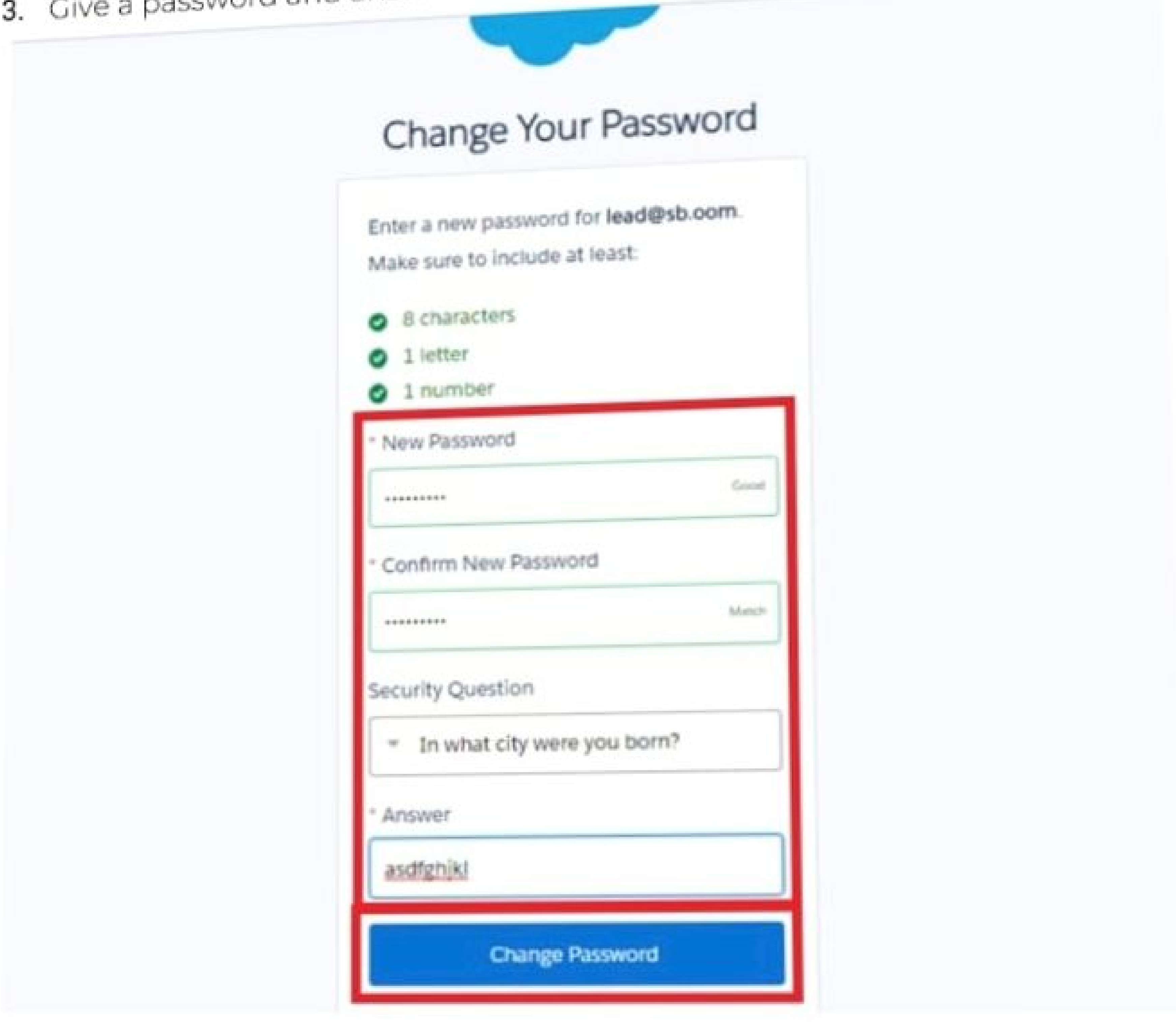
This need not be an actual email id, you can give anything in the format : username@organization.com

Click on sign me up after filling these.

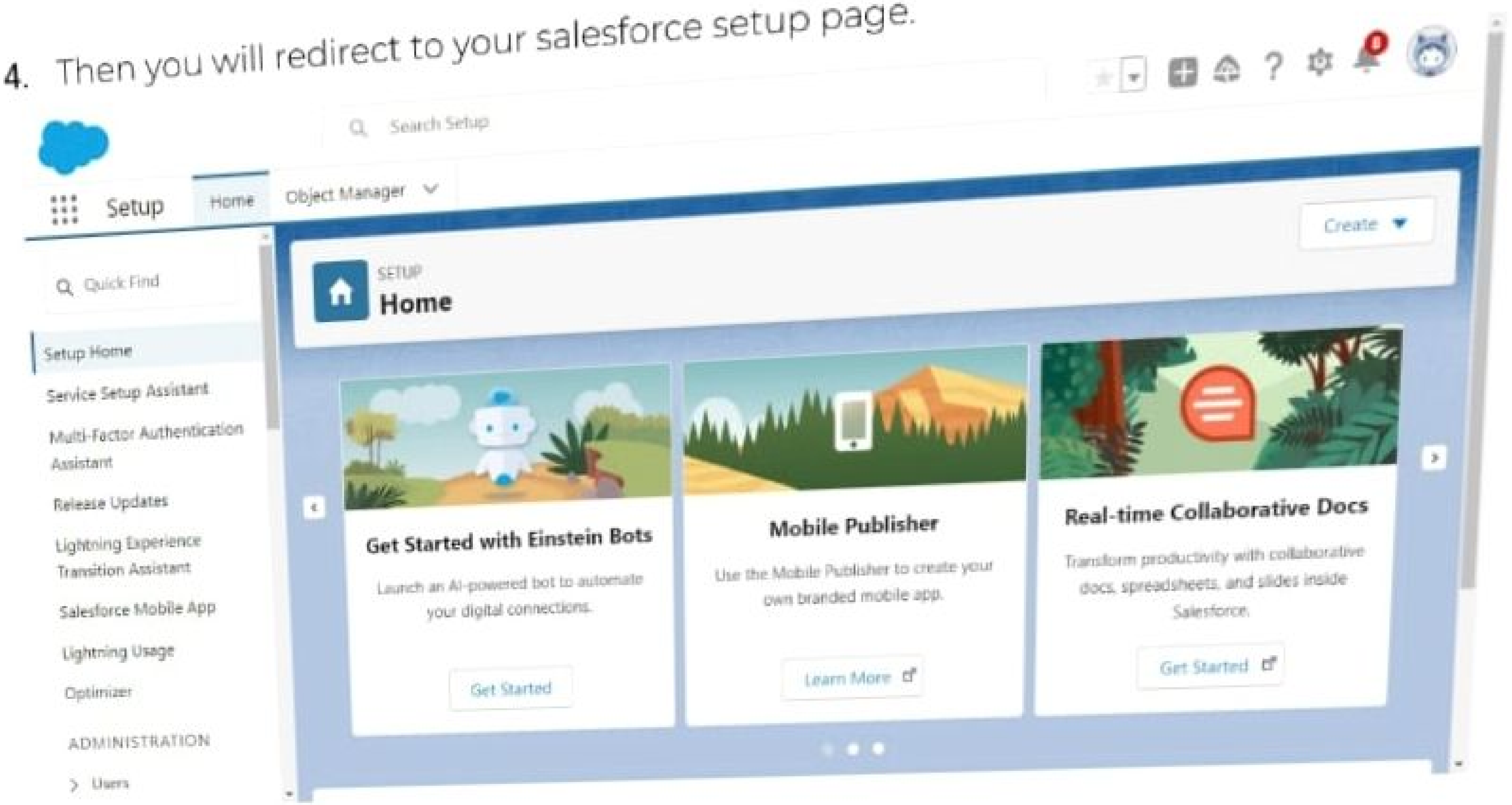
Account Activation

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 passwor



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



TASK 2:

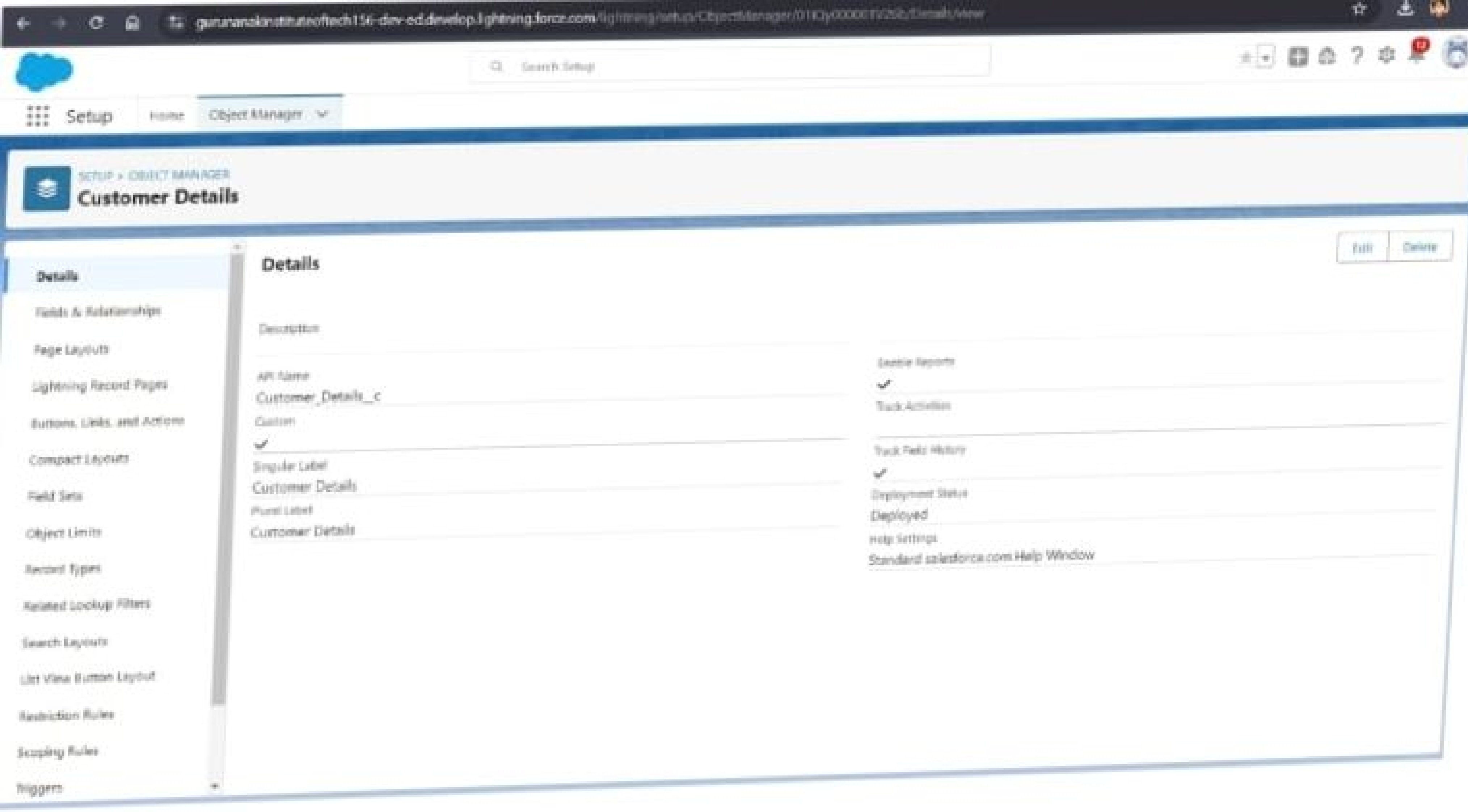
Create Customer Details Object

To create an object:

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

1. Enter the label name >> Customer Details
2. Plural label name >> Customer Details
3. Enter Record Name Label and Format
   - Record Name >> Customer Name
   - Data Type >> Text

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



Create Appointment Object

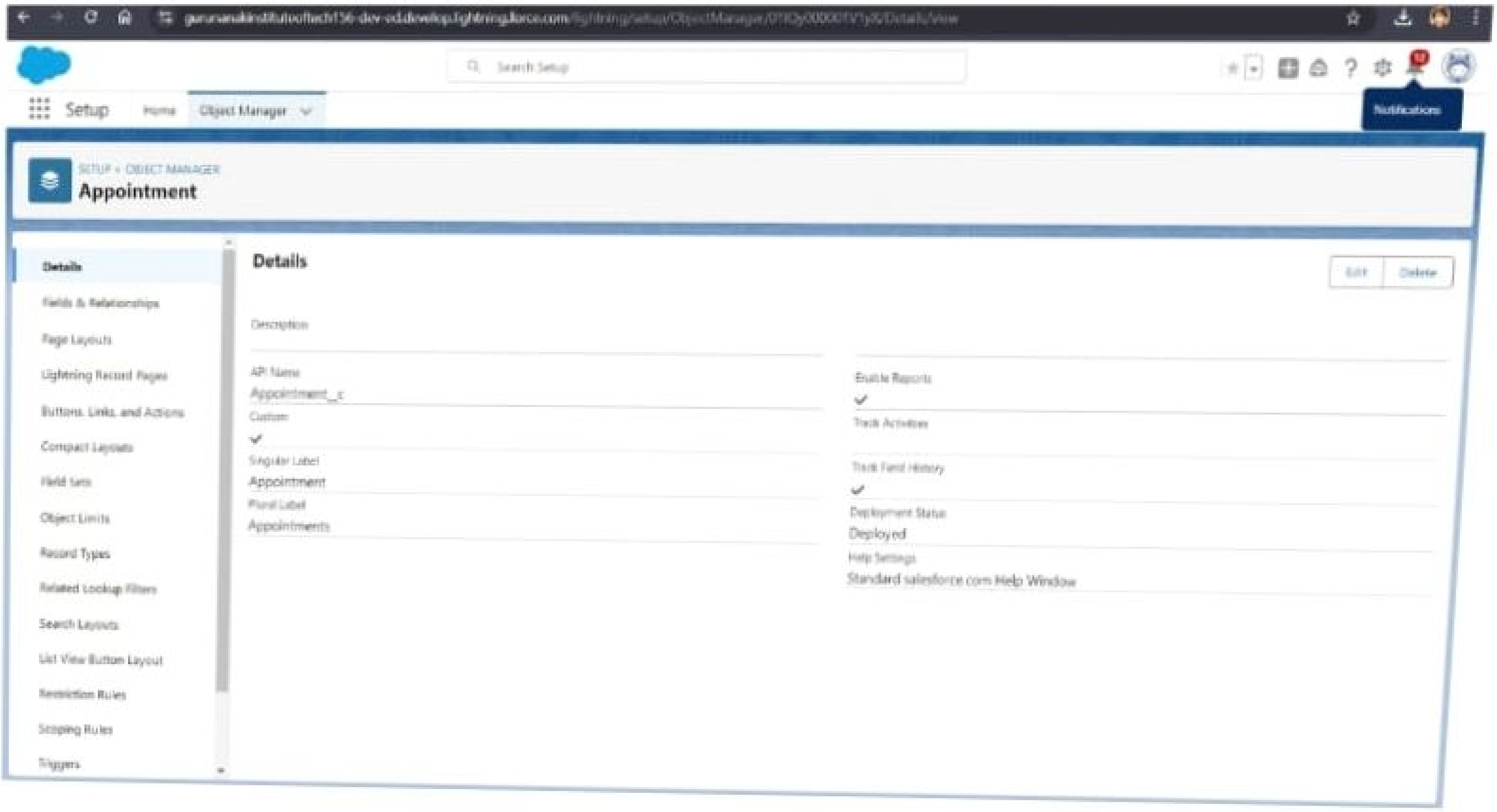
To create an object:

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

1. Enter the label name >> Appointment
2. Plural label name >> Appointments
3. Enter Record Name Label and Format

- Record Name >> Appointment Name
- Data Type >> Auto Number
- Display Format >> app-{000}
- Starting number >> 1

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



Create Service records Object

To create an object:

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

1. Enter the label name >> Service records
2. Plural label name >> Service records
3. Enter Record Name Label and Format

- Record Name >>Service records Name
- Data Type >> Auto Number
- Display Format >> ser-{000}
- Starting number >> 1

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

Create Billing details and feedback Object

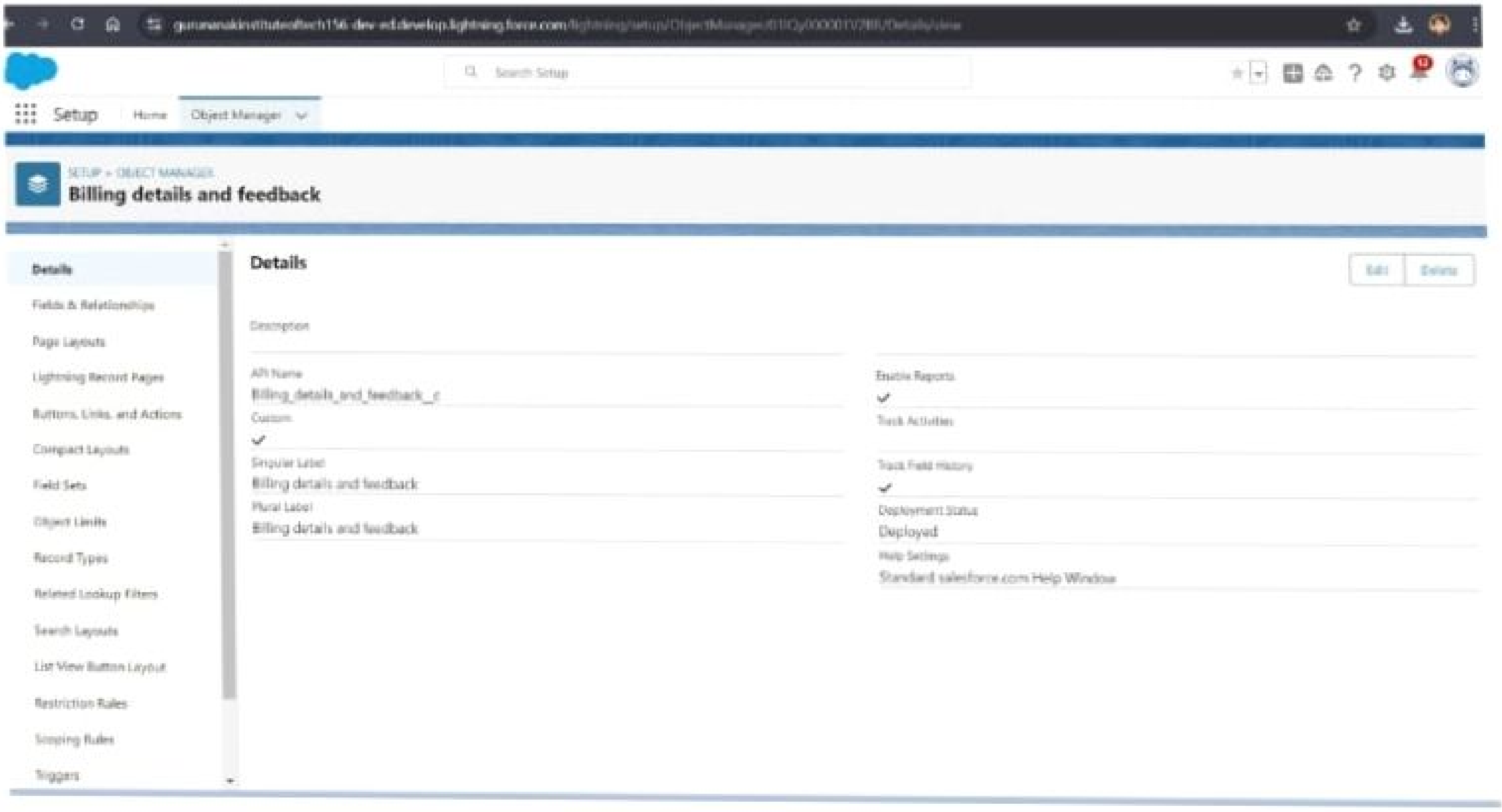
o create an object:

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

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

- Record Name >> Billing details and feedback Name
- Data Type >> Auto Number
- Display Format >> bill-{000}
- Starting number >> 1

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

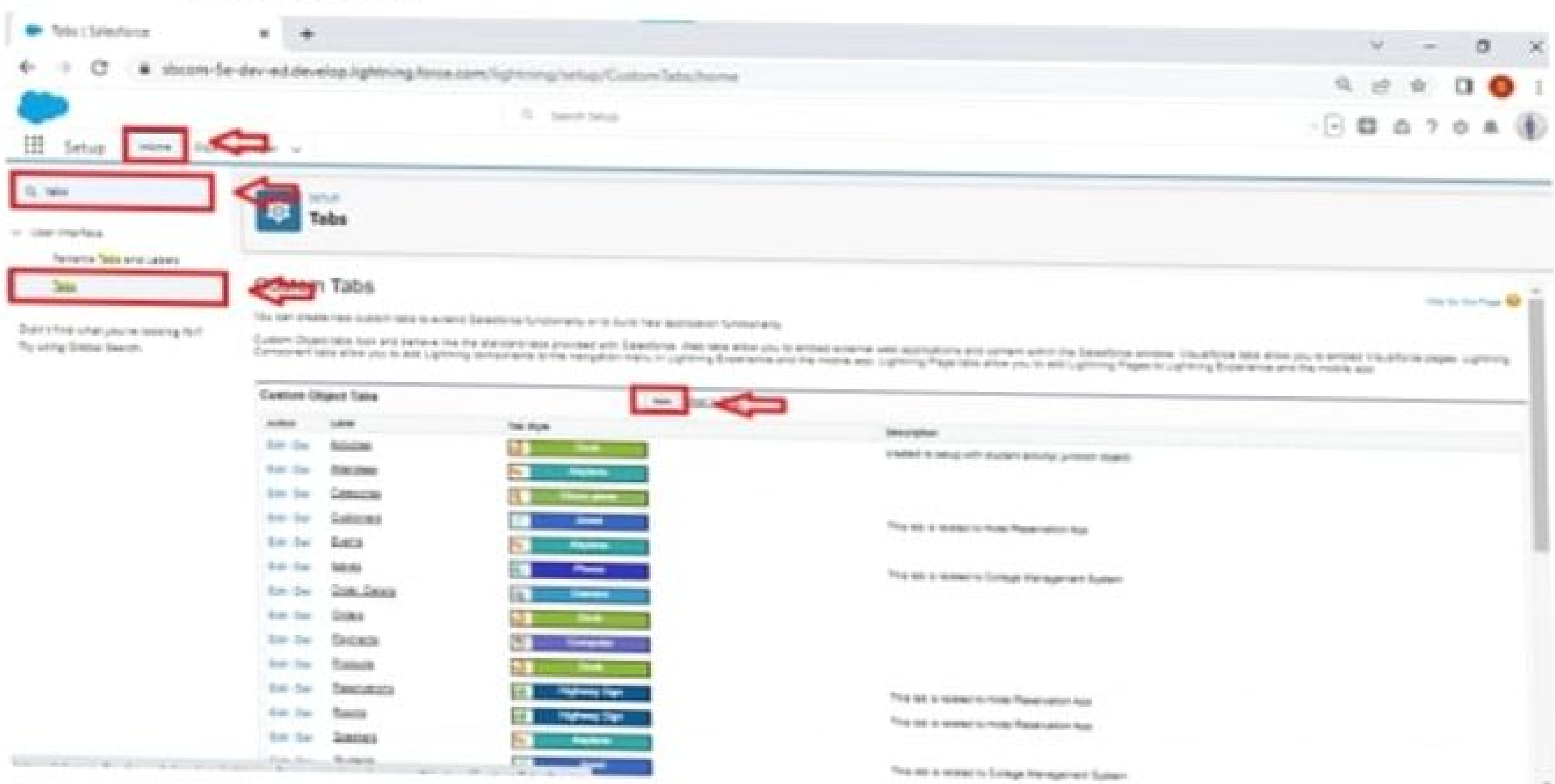


TASK 3:

Creating a Custom Tab

To create a Tab:(Customer Details)

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



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


New Custom Object Tab
Step 1 of 3
Step 1. Enter the Details
Choose the custom object for this new custom tab. Fill in other details.
Select an existing custom object or create a new custom object now.
Object
Customer Details
Tab Style
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link
--None--
Enter a short description.
Description
Next
Cancel


Tab Style Selector
Create your own style
Hide styles which are used on other tabs
Airplane
Bank[1]
Books
Building
Can
Cell phone
Circle
CRT TV
Dice
Form
Hammer
Heart[1]
Hot Air Balloon
Keys
Alarm clock
Bell
Bottle
Building Block
Car
Chalkboard
Compass
Cup
Factory
Gears
Hands
Helicopter
Insect
Laptop
Apple
Big top
Box
Caduceus
Castle
Chess piece
Computer
Desk[1]
Fan
Globe
Handsaw
Hexagon
IP Phone
Leaf
Balls
Boat[1]
Bridge
Camera
CD/DVD
Chip
Credit card
Diamond
Flag
Guitar
Headset
Highway Sign
Jewel
Lightning
Save
Cancel

To create a Tab:(Appointment)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. Select Object(Appointment) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .
3. Make sure that the Append tab to users' existing personal customizations is checked.
4 . Click save

To create a Tab:(Service Records)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. 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 .
3. Make sure that the Append tab to users' existing personal customizations is checked.
4 . Click save

To create a Tab:(Billing details and feedback)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. Select Object(Billing details and feedback) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .
3. Make sure that the Append tab to users' existing personal customizations is checked.
4 . Click save

TASK 4:

Create a Lightning App

To create a lightning app page:

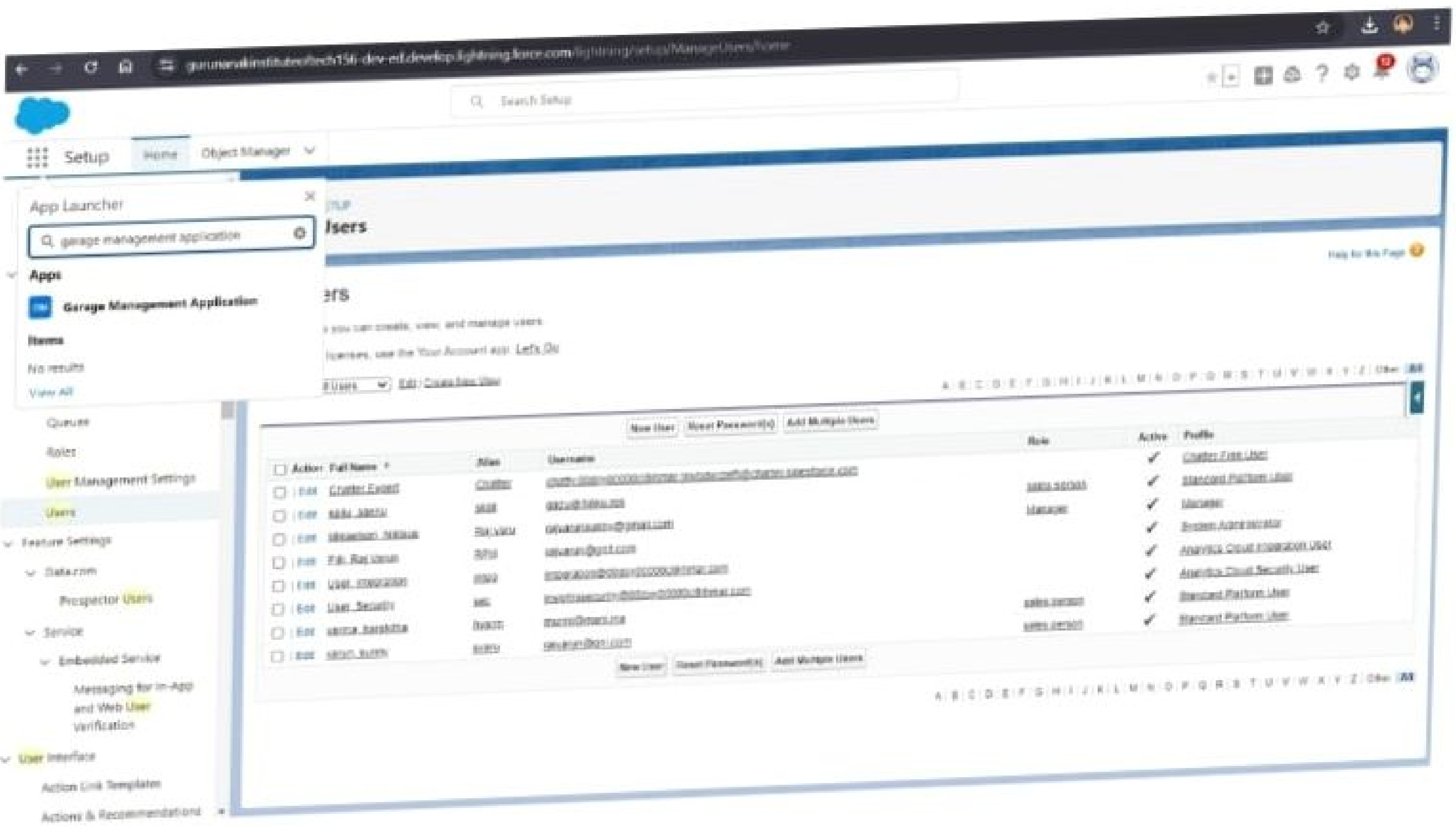
1. Go to setup page >> search "app manager" in quick find >> select "app manager" >> click on New lightning App.

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

3. To Add Navigation Items:
4. Select the items (Customer Details,Appointments, Service records, Billing details and feedback, Reports and Dashboards) f rom the search bar and move it using the arrow button >> Next.

5. To Add User Profiles:

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



TASK 5:

Creation of fields for the Customer Details object

1. To create fields in an object:

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

2. Now click on "Fields & Relationships" >> New

3. Select Data Type as a "Phone"

4. Click on next.

5. Fill the Above as following:

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

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

2. To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Customer Details) in search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as a "Email" and Click on Next
4. Fill the Above as following:

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

Creation of Lookup Fields

Creation of Lookup Field on Appointment Object :

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

2. Now click on "Fields & Relationships" >> New

3. Select “Look-up relationship” as data type and click Next.
4. Select the related object “ Customer Details” and click next.
5. Next >> Next >> Save.

Note: Make sure you complete Activity 4 Before continuing.

Creation of Lookup Field on Service records Object :

1. Go to setup >> click on Object Manager >> type object name(Service records) in search bar >> click on the object.
2. Now click on “Fields & Relationships” >> New
3. Select “Look-up relationship” as data type and click Next.
4. Select the related object “ Appointment ” and click next.
5. Make it a required field so click on Required.
6. Scroll down for Lookup Filter and click on Show filter settings.
7. Now add the filter criteria.
8. Field : Appointment: Appointment Date >> Operator : less than >> select field >> Appointment: Created Date
9. Filter type should be Required.
10. Error Message : Value does not match the criteria.
11. Enable the filter by click on Active.
12. Next >> Next >> Save.

Creation of Lookup Field on Billing details and feedback Object :

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

Creation of Checkbox Fields

Creation of Checkbox Field on Appointment Object :

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

2. Now click on "Fields & Relationships" >> New.
3. Select "Check box" as data type and click Next.
4. Give the Field Label : Maintenance service
5. Field Name : is auto populated
6. Default value : unchecked
7. Click on next >> next >> save.

Creation of Another Checkbox Field on Appointment Object :

1. Repeat the steps form 1 to 3.
2. Give the Field Label : Repairs
3. Field Nme : is auto populated
4. Default value : unchecked
5. Click on next >> next >> save.
6. Follow the same and create another checkbox with given names
7. Give the Field Label : Replacement Parts
8. Field Nme : is auto populated
9. Default value : unchecked
10. Click on next >> next >> save.

Creation of Checkbox Field on Service records Object :

1. Go to setup >> click on Object Manager >> type object name(Service records) in search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select "Check box" as data type and click Next.
4. Give the Field Label : Quality Check Status
5. Field Nme : is auto populated
6. Default value : unchecked
7. Click on next >> next >> save

Creation of date Fields

Creation of Date Field on Appointment Object :

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

Creation of Currency Fields

Creation of Currency Field on Appointment Object :

1. Go to setup >> click on Object Manager >> type object name(Appointment) in the search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select "Currency" as data type and click Next.
4. Give the Field Label : Service Amount
5. Field Nme : is auto populated
6. Click on next
7. Give read only for all the profiles in field level security for profile.
8. Click on next > > save.

Creation of Currency Field on Billing details and feedback Object :

1. Follow the same steps as mentioned above in Billing details and feedback Object.
2. Change the label name as mentioned.
3. Give the Field Label : Payment Paid
4. Field Nme : is auto populated

Creation of Text Fields

1. Go to setup >> click on Object Manager >> type object name(Appointment) in the search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select " Text" as data type and click Next.
4. Give the Field Label : Vehicle number plate

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

Creation of Text Fields in Billing details and feedback object :

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

Creation of Picklist Fields

Creation of Picklist Fields in Service records object :

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

Creation of Picklist Fields in Billing details and feedback object :

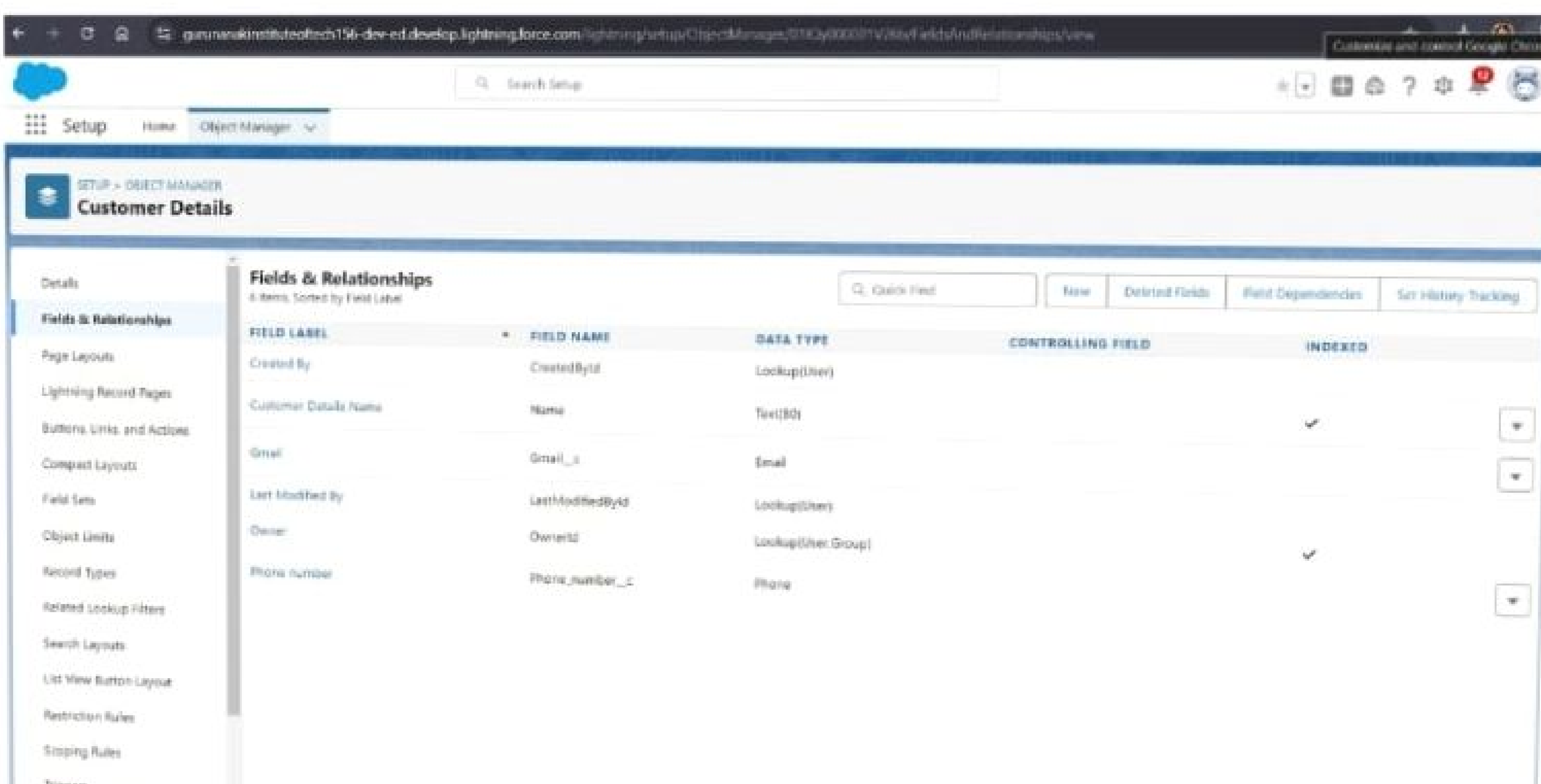
1. Go to setup >> click on Object Manager >> type object name(Billing details and feedback) in search bar >> click on the object.
2. Click on fields & relationship >> click on New.
3. Select Data type as "Picklist" and click Next.
4. Enter Field Label as "Payment Status", under values select "Enter values, with each

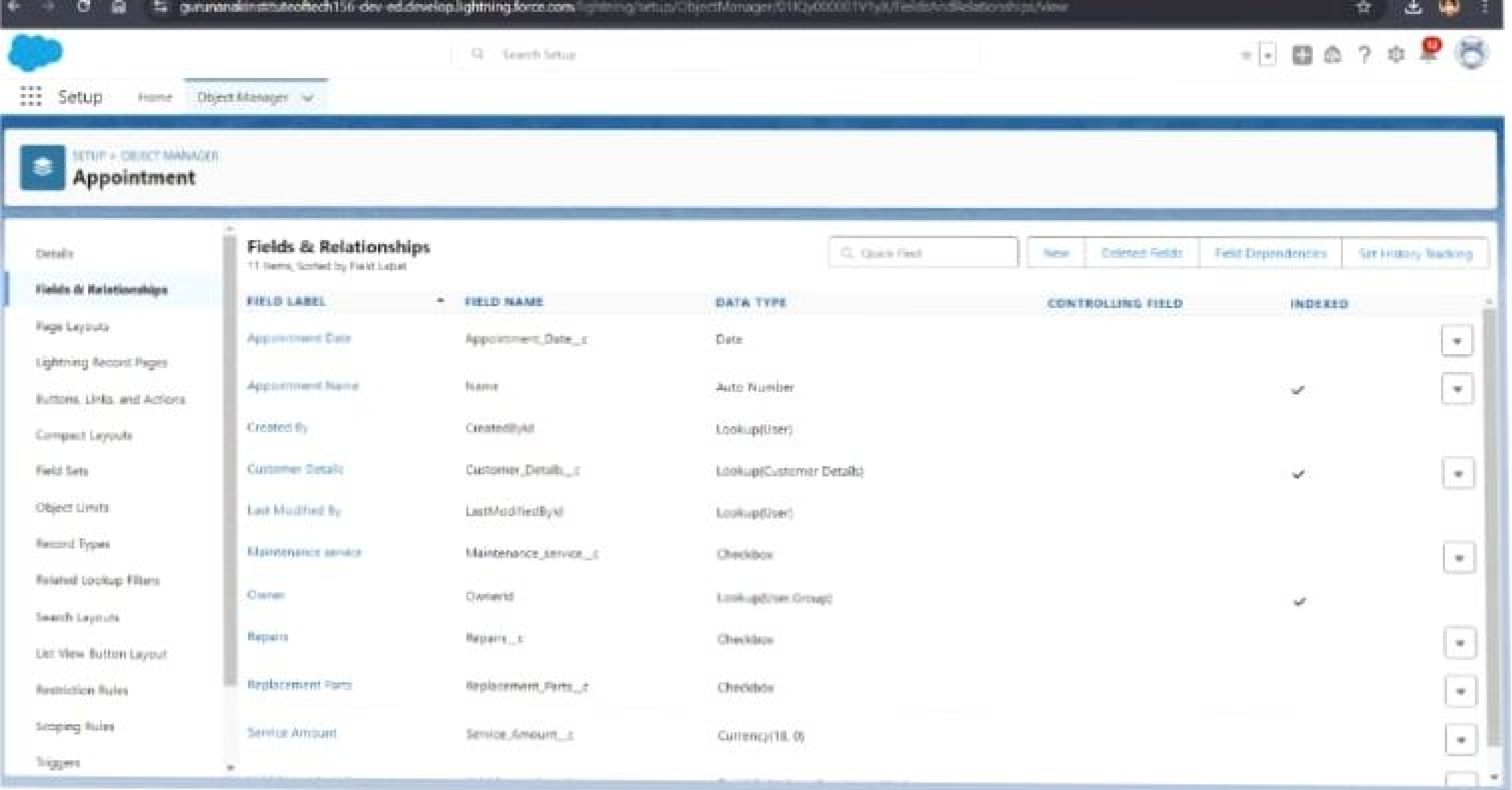
value separated by a new line" and enter values as shown below.

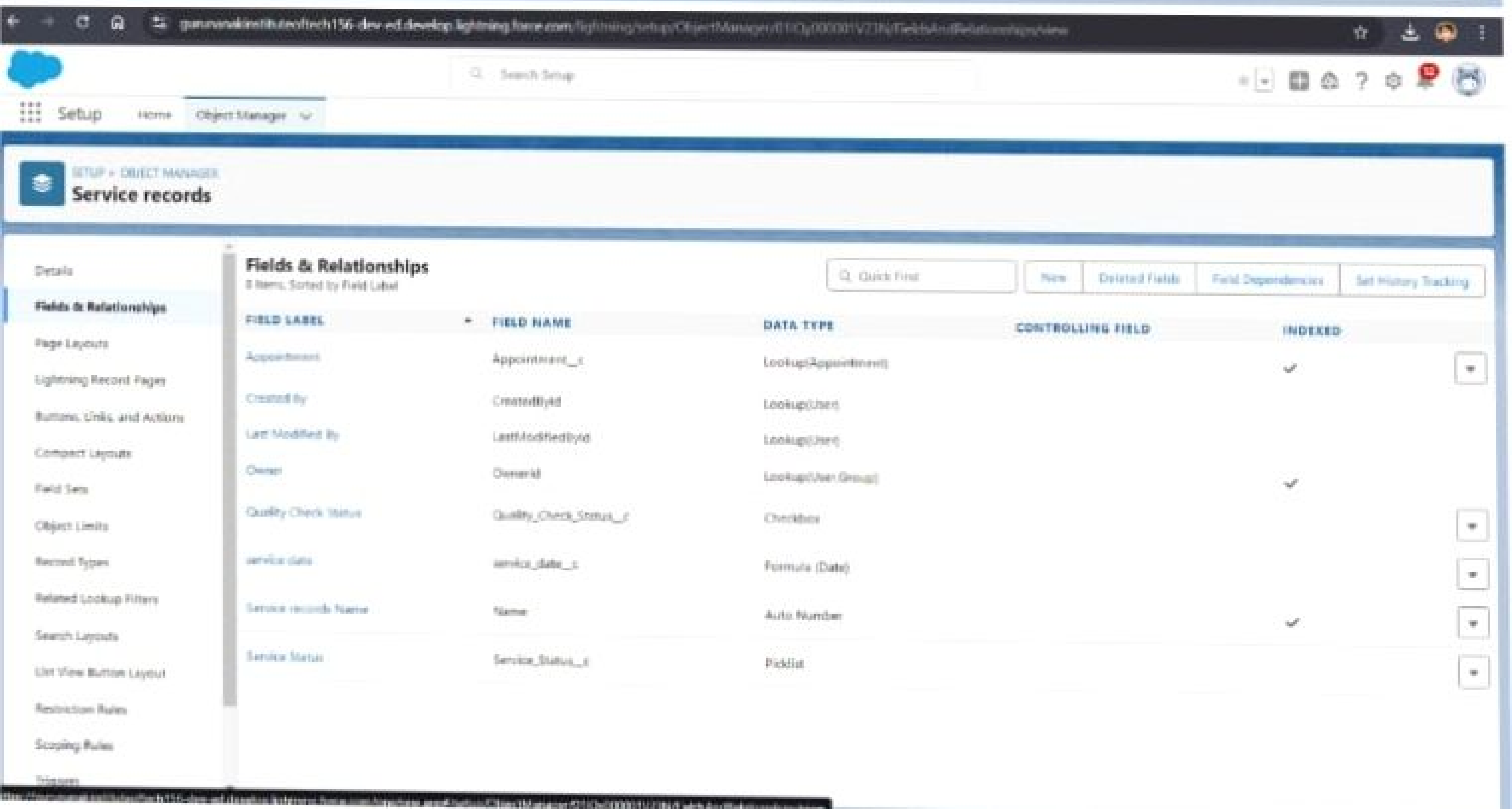
5. The values are: Pending, Completed.
6. Click Next.
7. Next >> Next >> Save.

Creating Formula Field in Service records Object

1. Go to setup >> click on Object Manager >> type object name(Service records) in search bar >> click on the object.
2. Click on fields & relationship >> click on New.
3. Select Data type as "Formula" and click Next.
4. Give Field Label and Field Name as "service date" and select formula return type as "Date" and click next.
5. Inser t field formula should be : CreatedDate.
6. click "Check Syntax" .
7. Click next >> next >> Save.




Setup
Home
Object Manager
SETUP > OBJECT MANAGER
Appointment
Details
Fields & Relationships
Page Layouts
Lightning Record Pages
Buttons, Links, and Actions
Compact Layouts
Field Sets
Object Limits
Record Types
Related Lookup Filters
Search Layouts
List View Button Layout
Restriction Rules
Scoping Rules
Triggers
Fields & Relationships
11 Items, Sorted by Field Label
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Appointment Date
Appointment_Date__c
Date
Appointment Name
Name
Auto Number
Created By
CreatedById
Lookup(User)
Customer Details
Customer_Details__c
Lookup(Customer Details)
Last Modified By
LastModifiedById
Lookup(User)
Maintenance service
Maintenance_service__c
Checkbox
Owner
OwnerId
Lookup(User,Group)
Repairs
Repairs__c
Checkbox
Replacement Parts
Replacement_Parts__c
Checkbox
Service Amount
Service_Amount__c
Currency(18, 0)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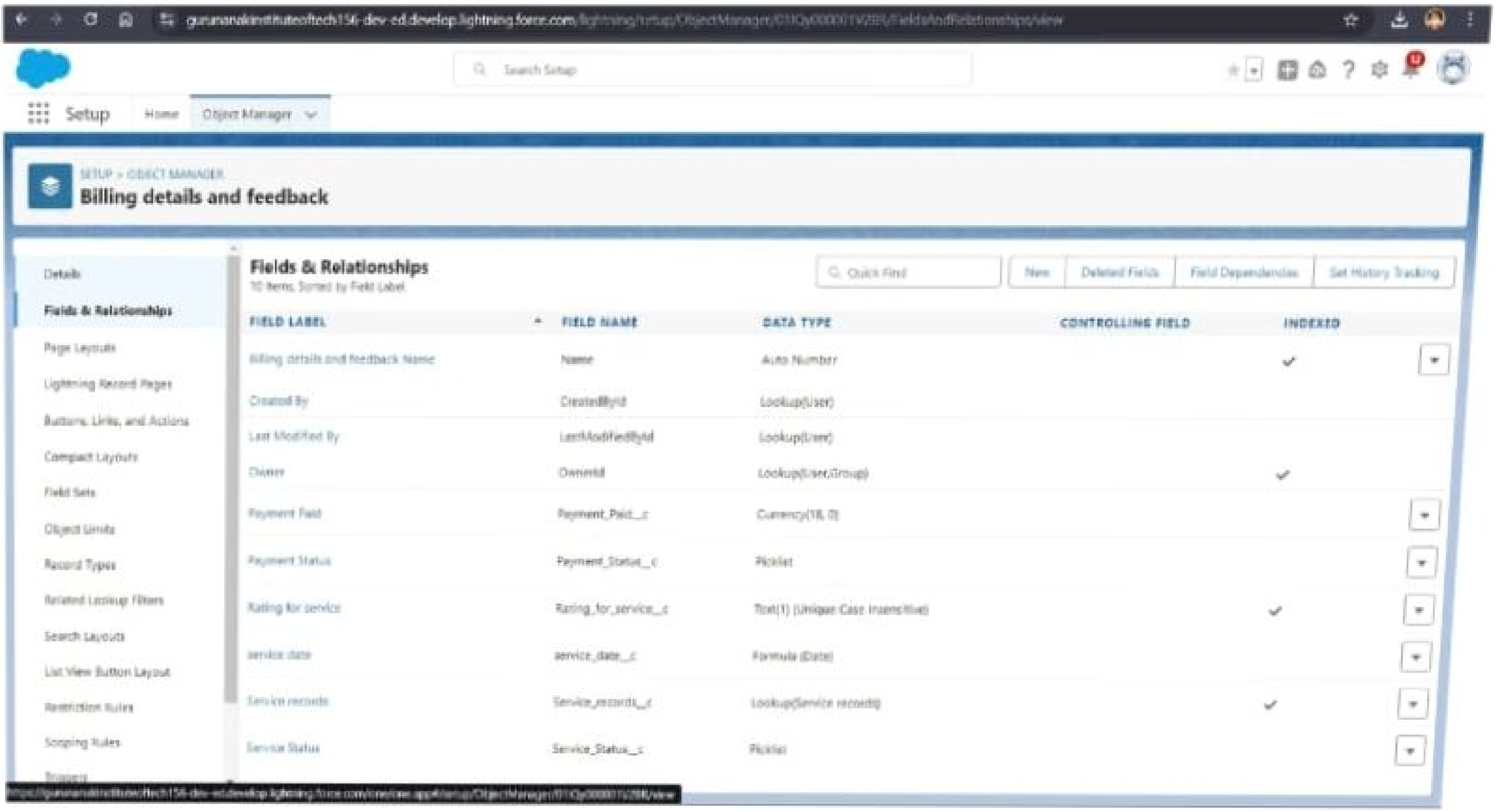
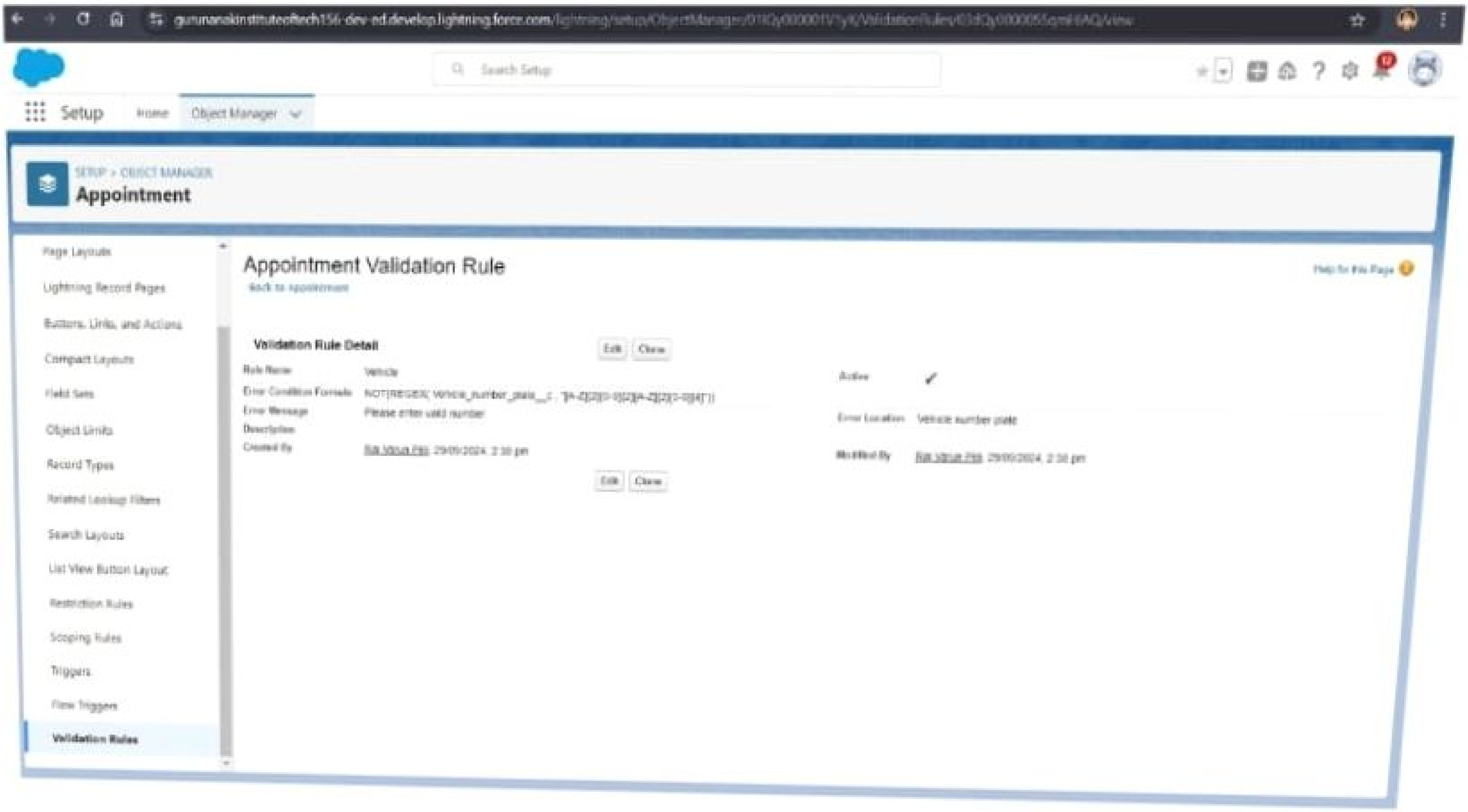
List View Button Layout
Restriction Rules
Scoping Rules
Triggers
Fields & Relationships
8 Items, Sorted by Field Label
New
Deleted Fields
Field Dependencies
Set History Tracking
FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
Appointment
Appointment__c
Lookup(Appointment)
Created By
CreatedById
Lookup(User)
Last Modified By
LastModifiedById
Lookup(User)
Owner
OwnerId
Lookup(User,Group)
Quality Check Status
Quality_Check_Status__c
Checkbox
service date
service_date__c
Formula (Date)
Service records Name
Name
Auto Number
Service Status
Service_Status__c
Picklist



TASK 6:

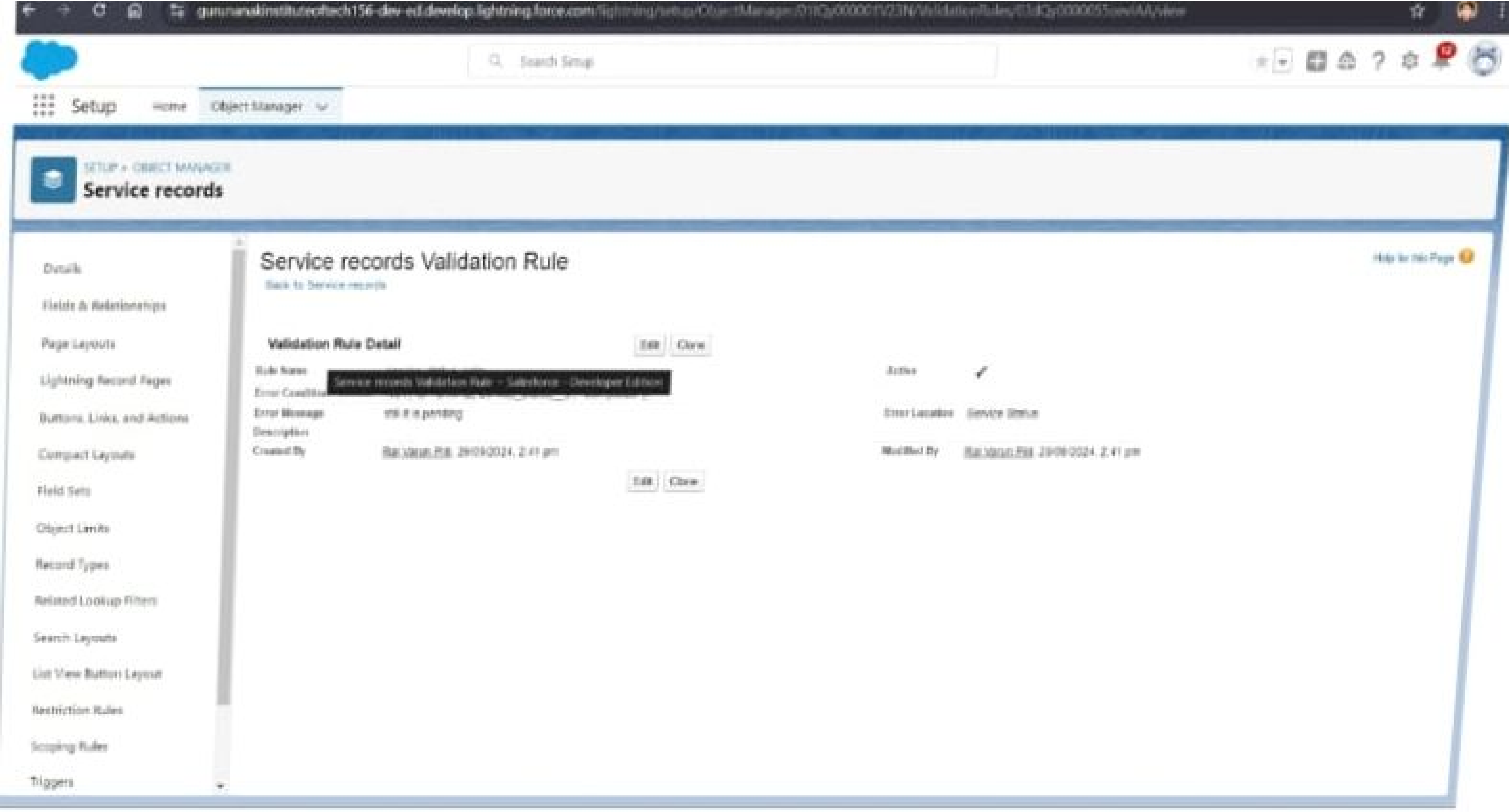
To create a validation rule to an Appointment Object

1. Go to the setup page >> click on object manager >> From drop down click edit for Appointment object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as " Vehicle ".
4. Inser t the Error Condition Formula as : -
   NOT(REGEX(Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))
5. Enter the Error Message as "Please enter vaild number ", select the Error location as Field and select the field as "Vehicle number plate", and click Save.



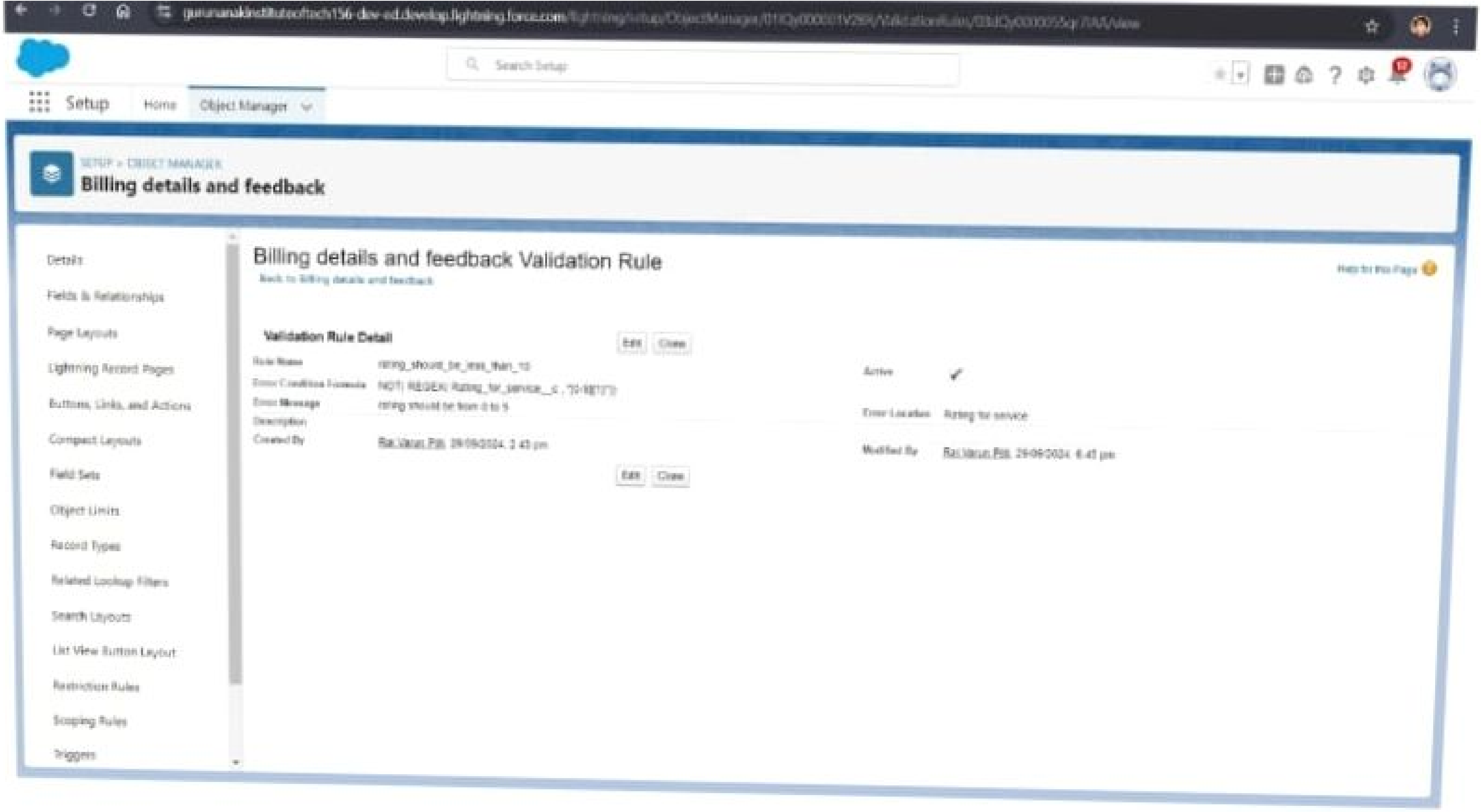
To create a validation rule to an Service records Object

1. Go to the setup page >> click on object manager >> From drop down click edit for Ser vice records objec t .
2. Click on the validation rule >> click New.
3. Enter the Rule name as " service_status_note ".
4. Inser t the Error Condition Formula as : -
   NOT(ISPICKVAL(Service_Status__c , "Completed"))
5. Enter the Error Message as "still it is pending", select the Error location as Field and selec t the field as " Ser vice status", and click Save.



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

1. Go to the setup page >> click on object manager >> From drop down click edit for Billing details and feedback object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as " rating_should_be_less_than_5".
4. Inser t the Error Condition Formula as : -
   NOT(REGEX(Rating_for_service__c , "[1-5]{1}"))
5. Enter the Error Message as " rating should be f rom 1 to 5", select the Error location as Field and select the field as "Rating for Service", and click Save.



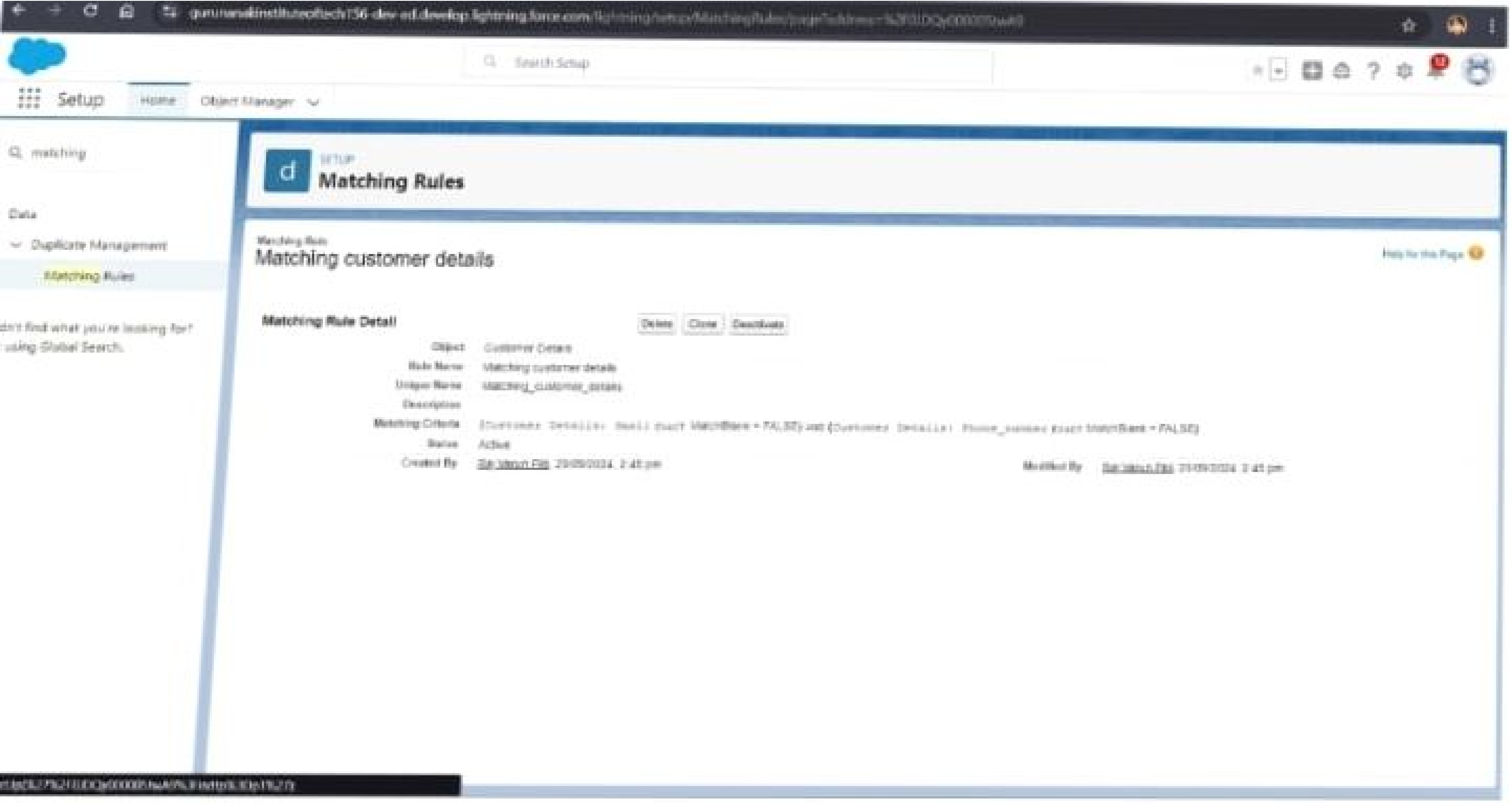
TASK 7:

To create a matching rule to an Customer details Object

1. Go to quick find box in setup and search for matching Rule.
2. Click on matching rule >> click on New Rule.
3. Select the object as Customer details and click Next.
4. Give the Rule name : Matching customer details
5. Unique name : is auto populated
6. Define the matching criteria as
7.

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

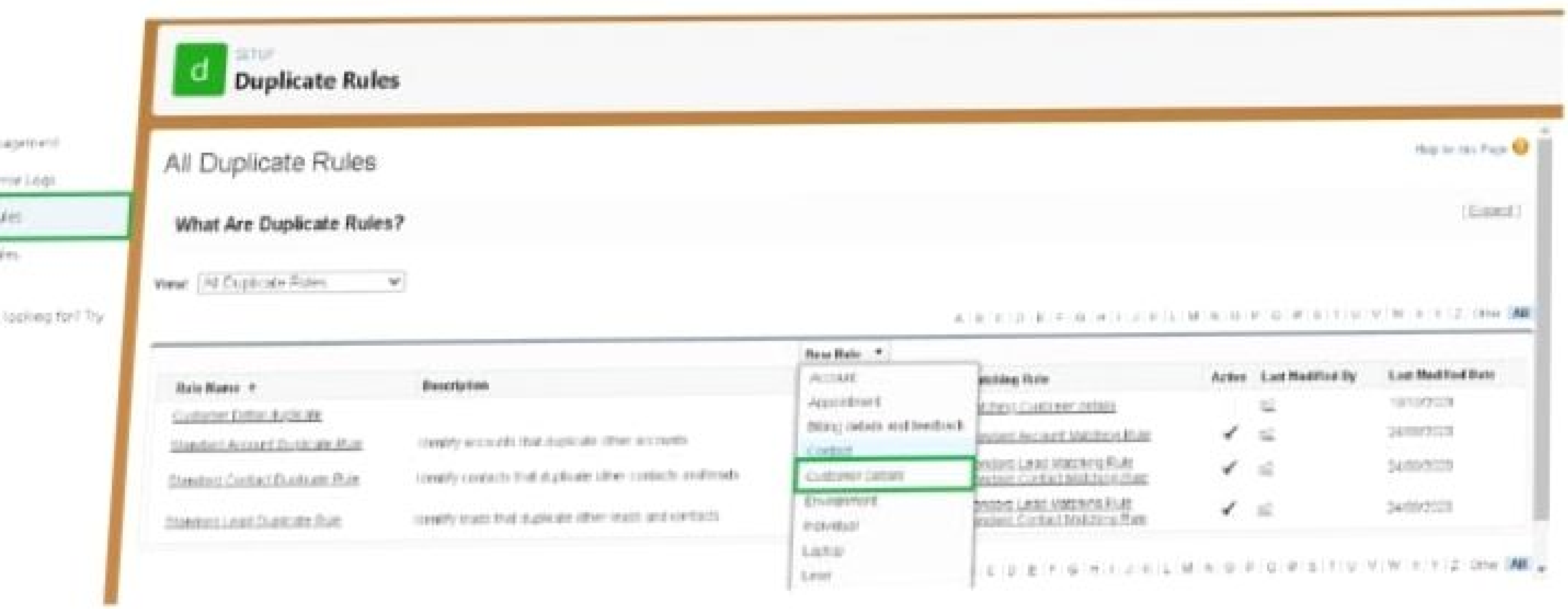
8. Click save.
9. After Saving Click on Activate.

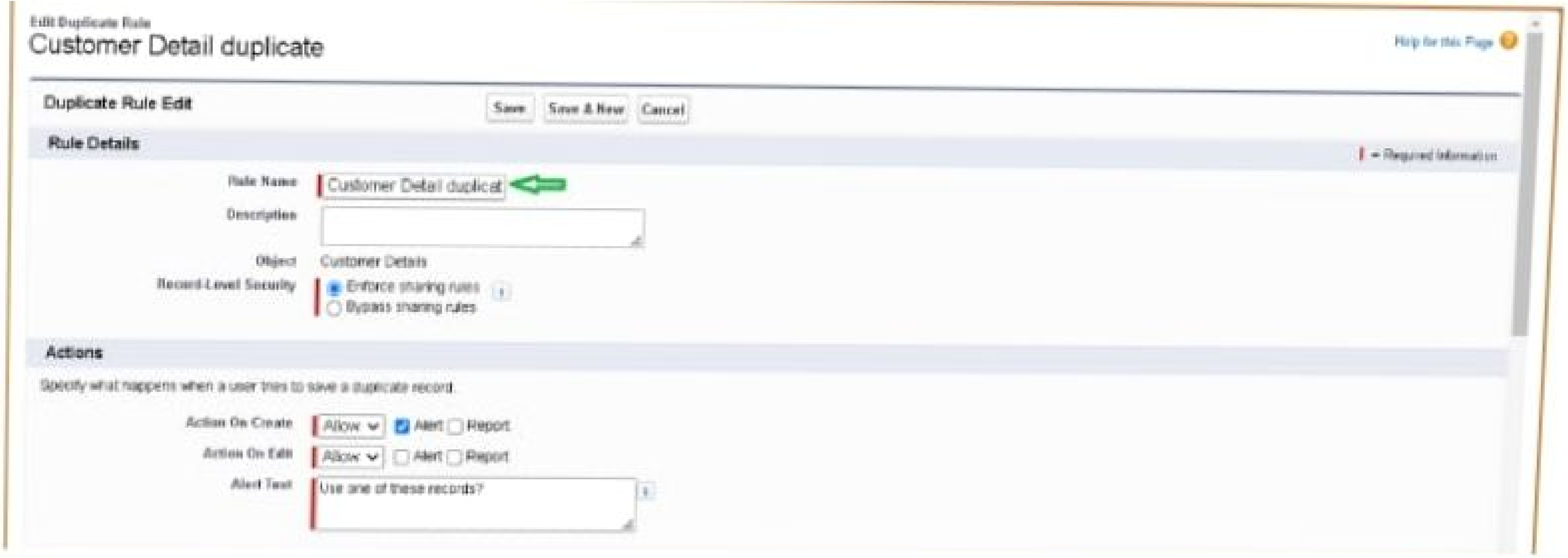


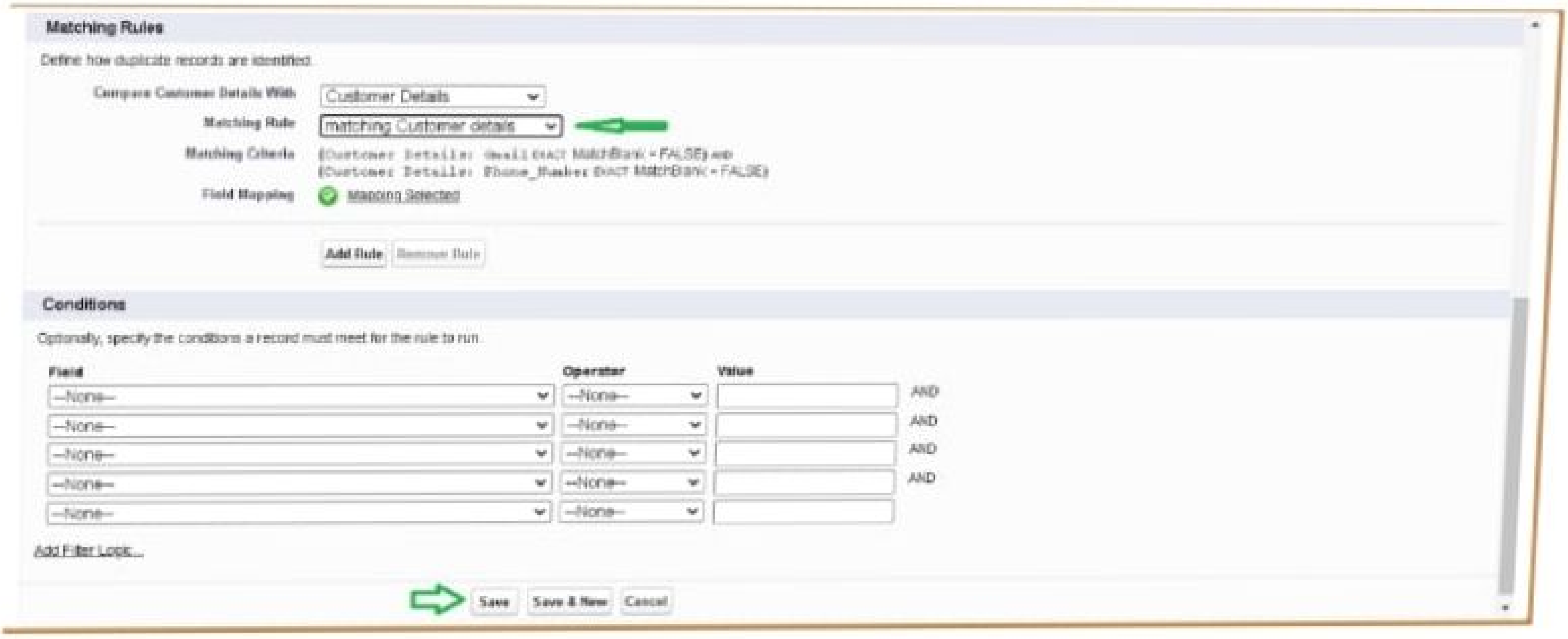
create a Duplicate rule to an Customer details
ject

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







TASK 8:

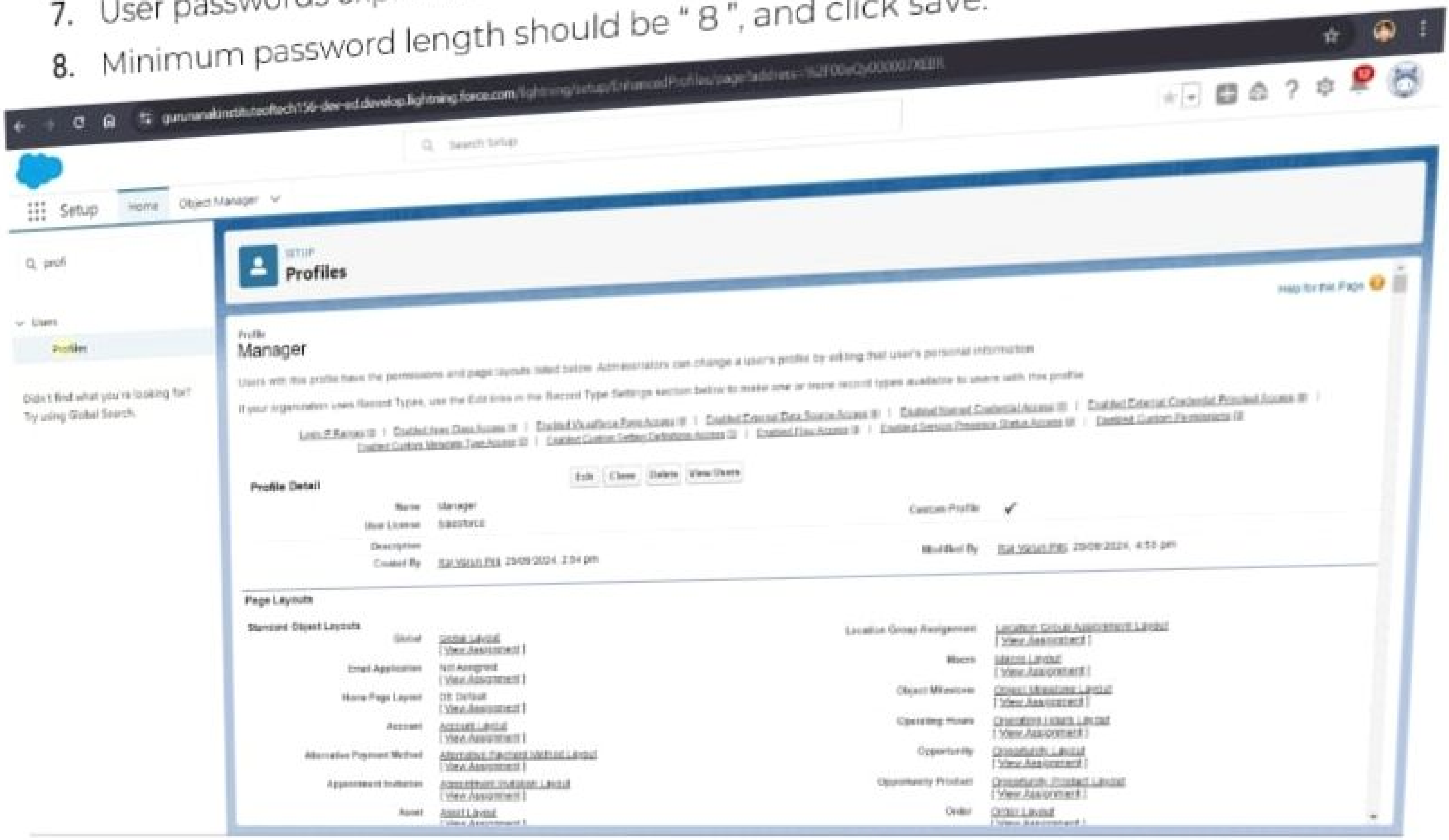
Manager Profile

To create a new profile:

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (Manager) >> Save.
2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the Garage management.
4. Scroll down to Custom Object Permissions and Give access permissions for Appointments,Billing details and feedback , service records and customer details objects as mentioned in the below diagram.
5. Changing the session times out after should be " 8 hours of inactivity".
6. Change the password policies as mentioned :

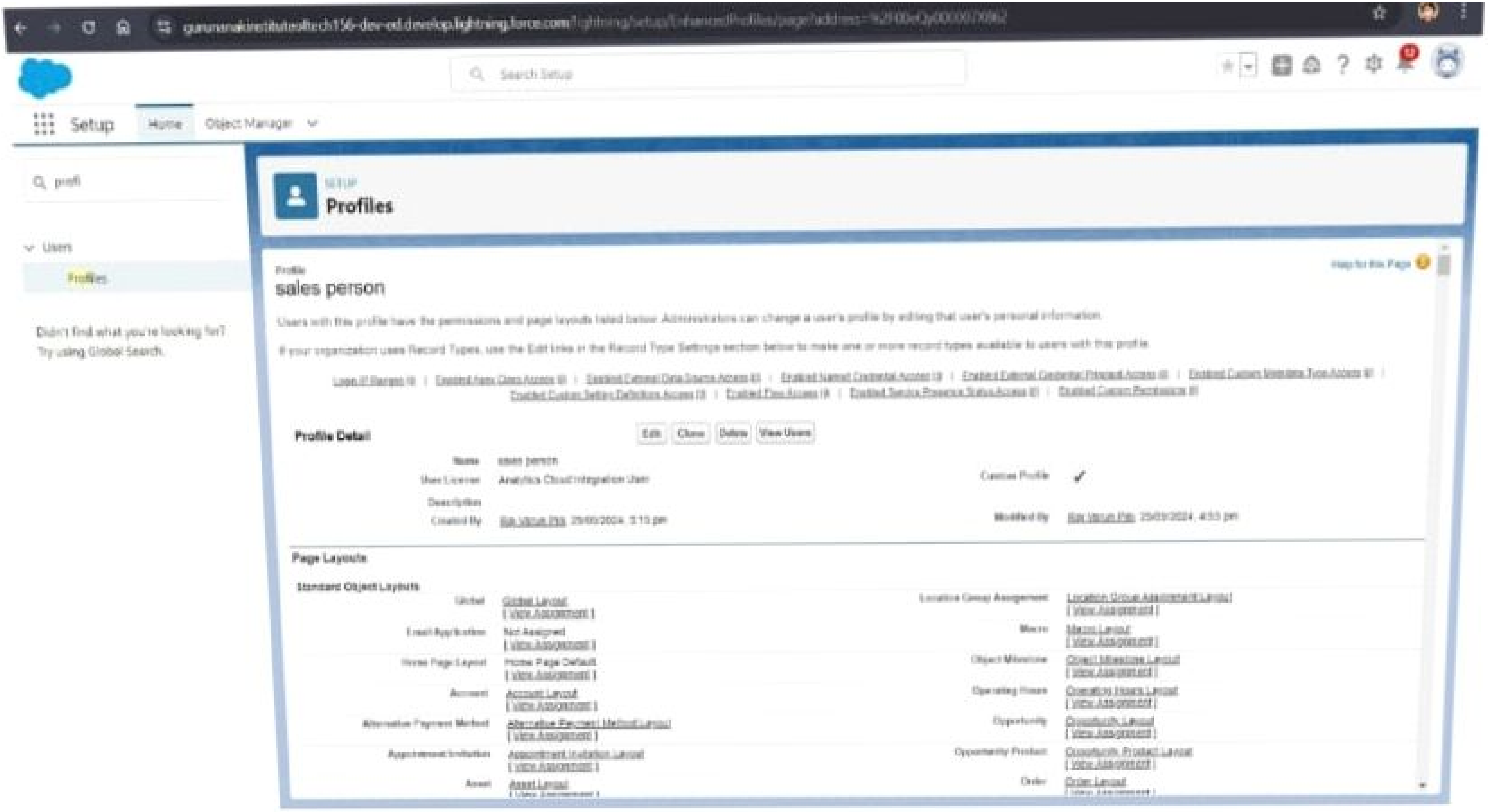
7. User passwords expire in should be " never exp

8. Minimum password length should be " 8 ", and click save.



sales person Profile

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



TASK 9:

Creating Manager Role

Creating Manager Role:

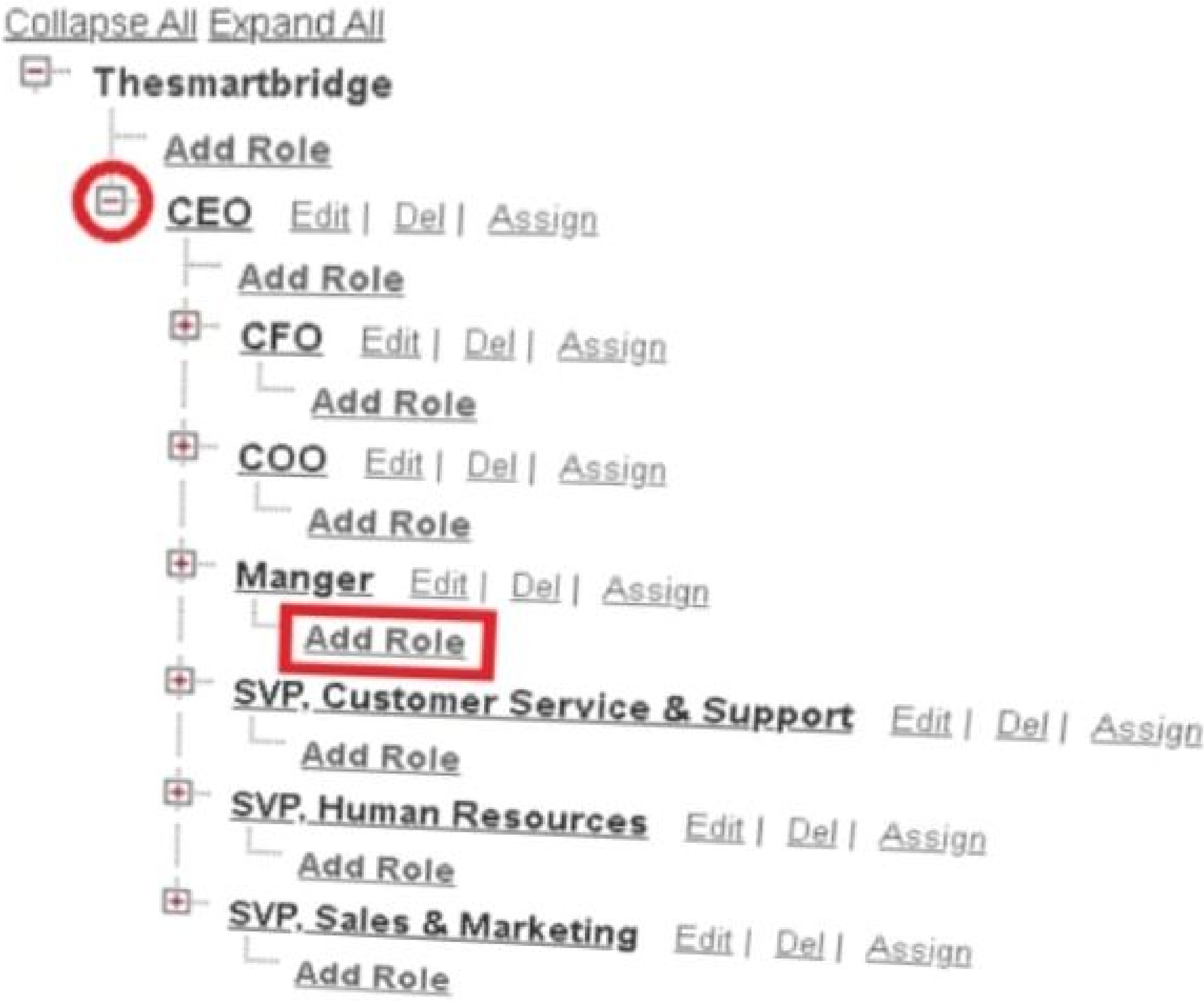
1. Go to quick find >> Search for Roles >> click on set up roles.
2. Click on Expand All and click on add role under whom this role works
3. Give Label as "Manager " and Role name gets auto populated. Then click on Save.

Creating another roles

Creating another two roles under manager

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

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

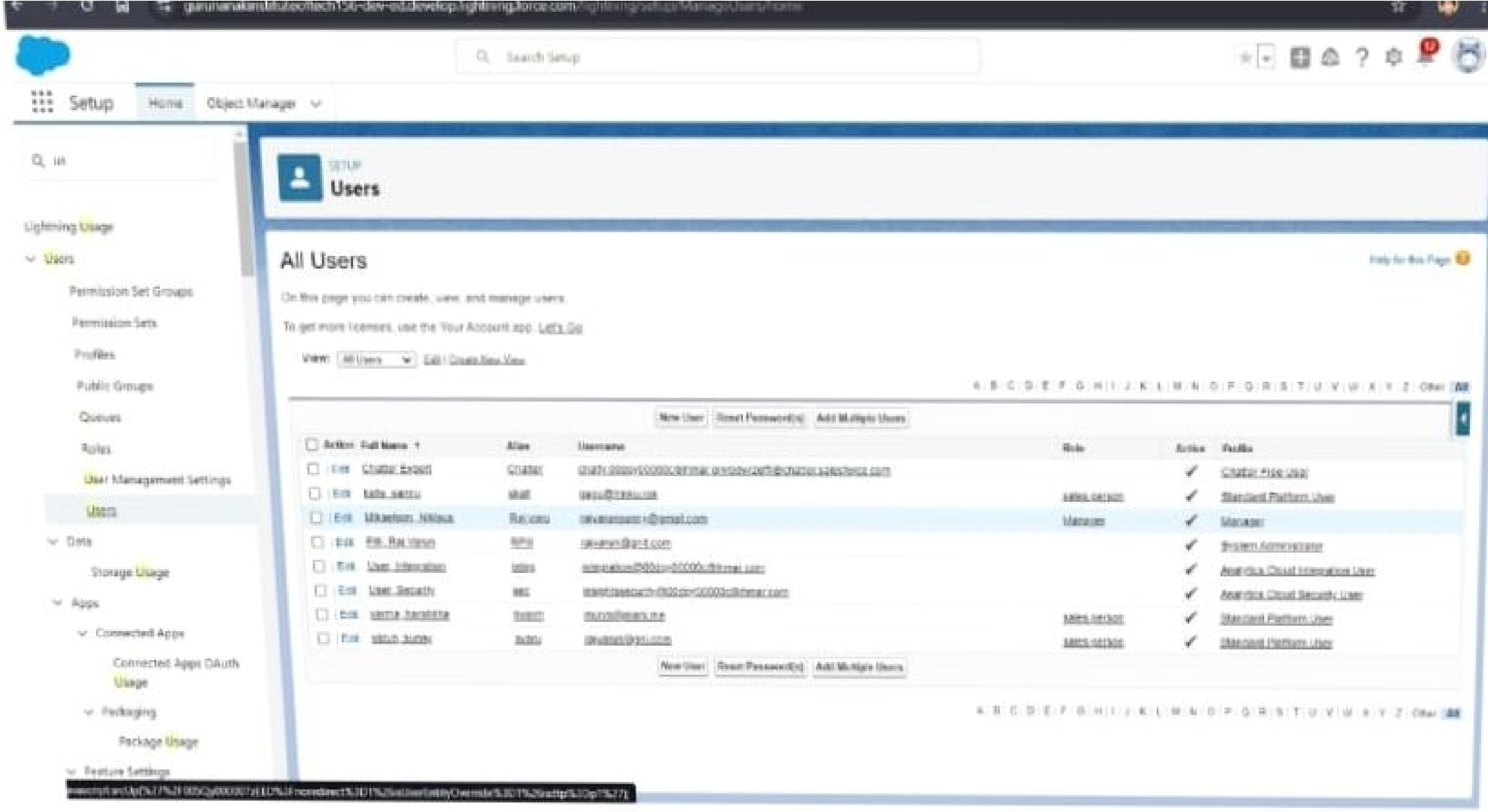


TASK 10:

Create User

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

3. Save.



creating another users

1. Repeat the steps and create another user using
    1. Role : sales person
    2. User licence : Salesforce Platform
    3. Profile : sales person

Note : create atleast 3 users with these permissions.

TASK 11:

Creating New Public Group

1. Go to setup >> type users in quick find box >> select public groups >> click New.
2. Give the Label as "sales team".
3. Group name is autopopulated.
4. Search for Roles.
5. In Available Members select Sales person and click on add it will be moved to selected member.
6. Click on save.

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INTRODUCTION

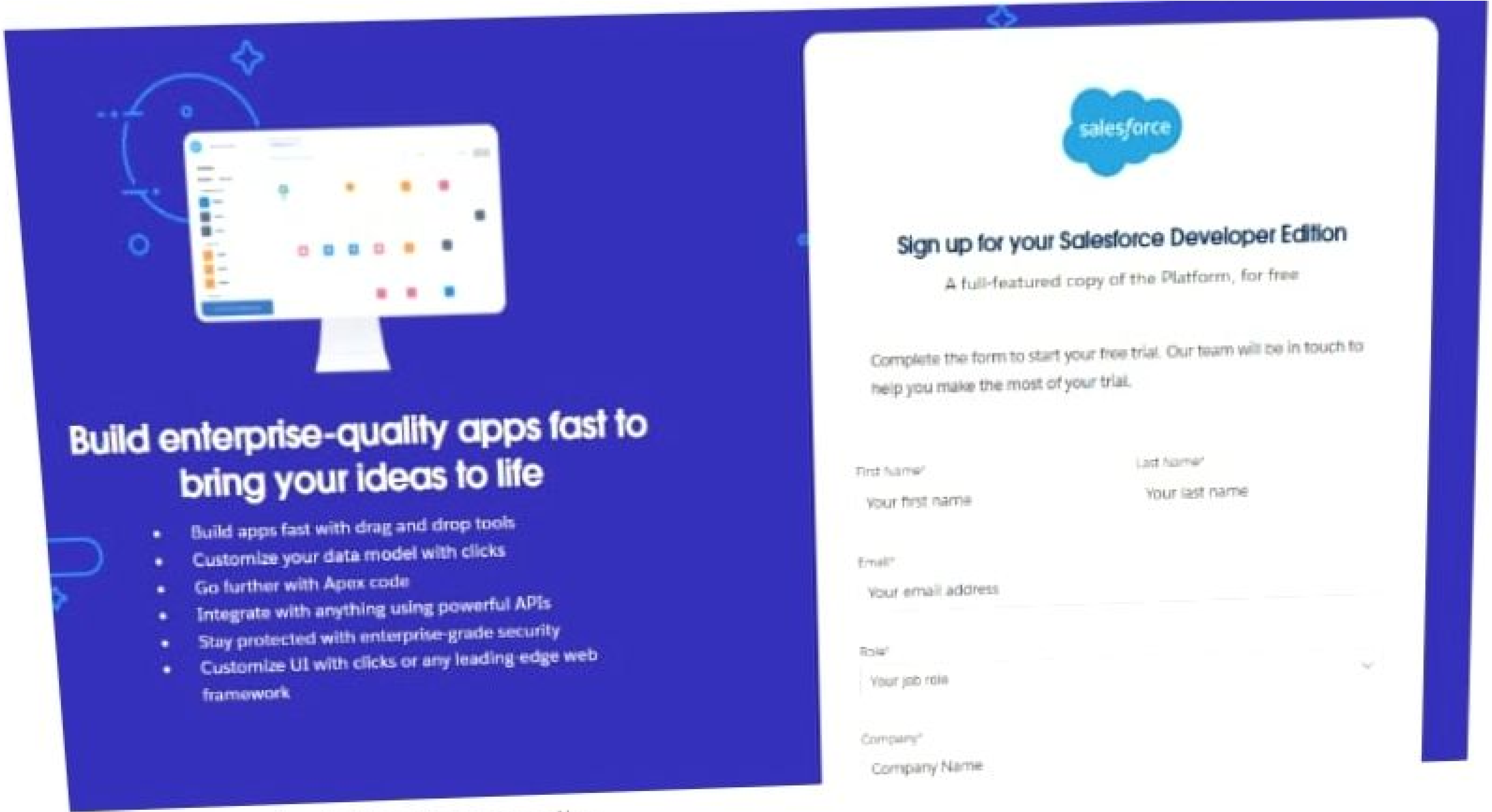
The Garage Management System is a comprehensive solution designed to optimize the usage of vehicles and trailers that carry inventories to stores. The system aims to streamline the management of vehicle records, track vehicles, and ensure efficient inventory transportation. The Garage Management System will be built on the Salesforce platform, leveraging its robust architecture and scalability. The system will consist of several components, including vehicle records, inventory management, workflow automation, and integration with other Salesforce modules. The implementation strategy will involve requirements gathering, design, development, testing, and deployment. The abstraction framework for the system will use an Integration Procedure to get input from a workflow, query the product model based on that input, and update products, attributes, and inventory levels. The Garage Management System will provide a flexible and scalable architecture for managing and optimizing inventor y transpor tation, ensuring efficient vehicle utilization, and automating business processes.

TASK 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 :

1. First name & Last name
2. Email
3. Role : Developer
4. Company : College Name
5. County : India
6. Postal Code : pin code
7. Username : should be a combination of your name and company

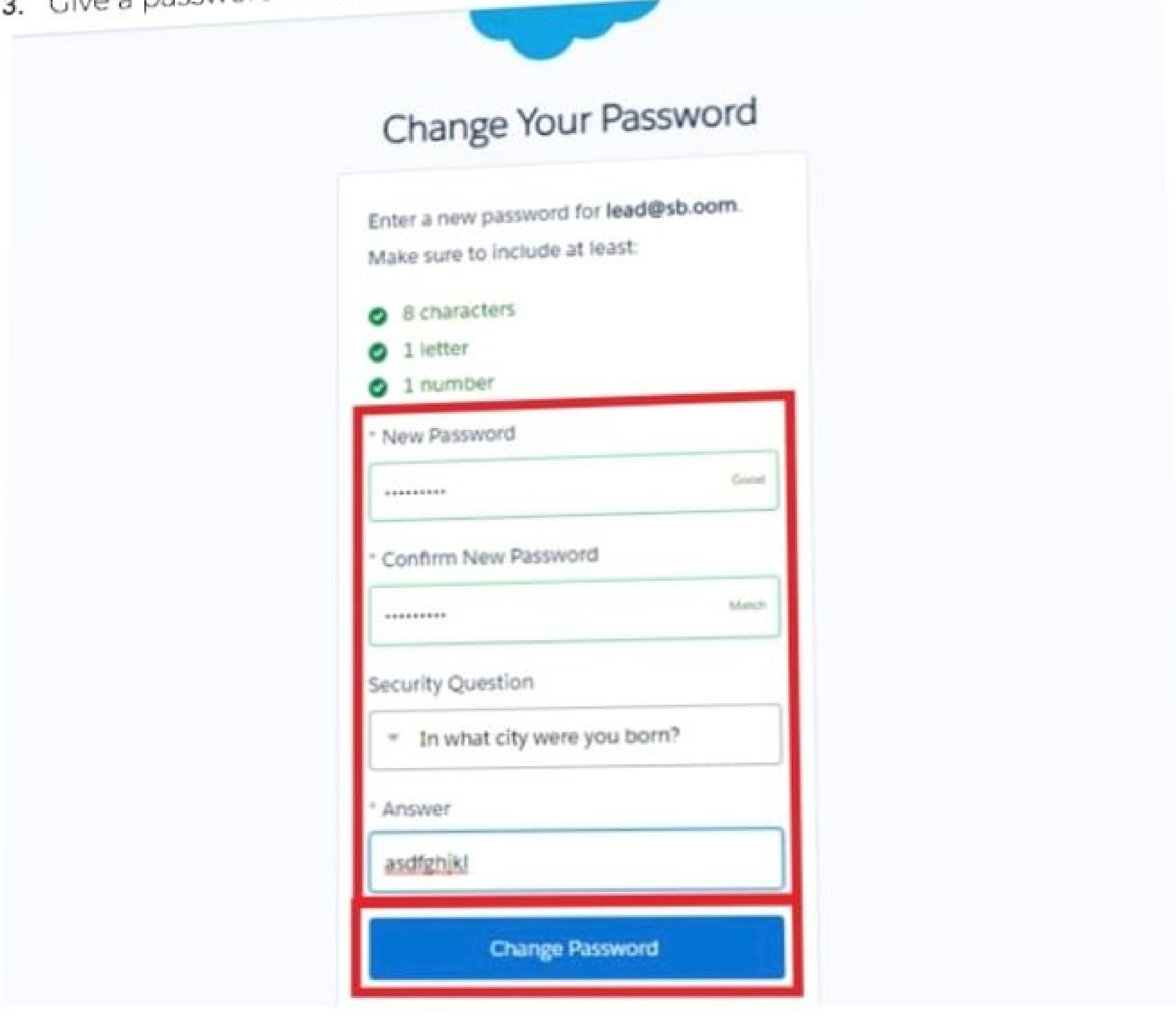
This need not be an actual email id, you can give anything in the format : username@organization.com

Click on sign me up after filling these.

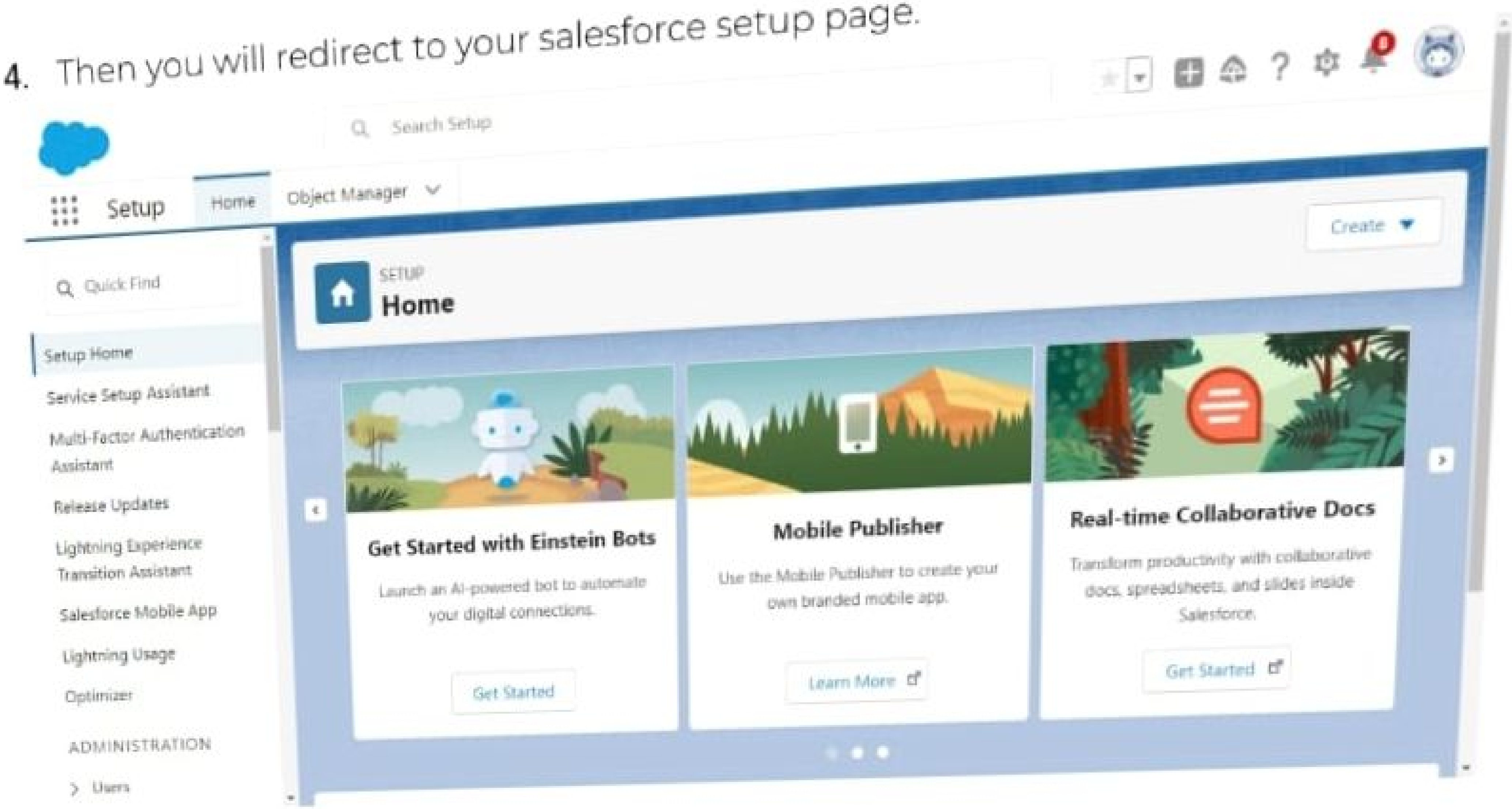
Account Activation

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 passwor



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



TASK 2:

Create Customer Details Object

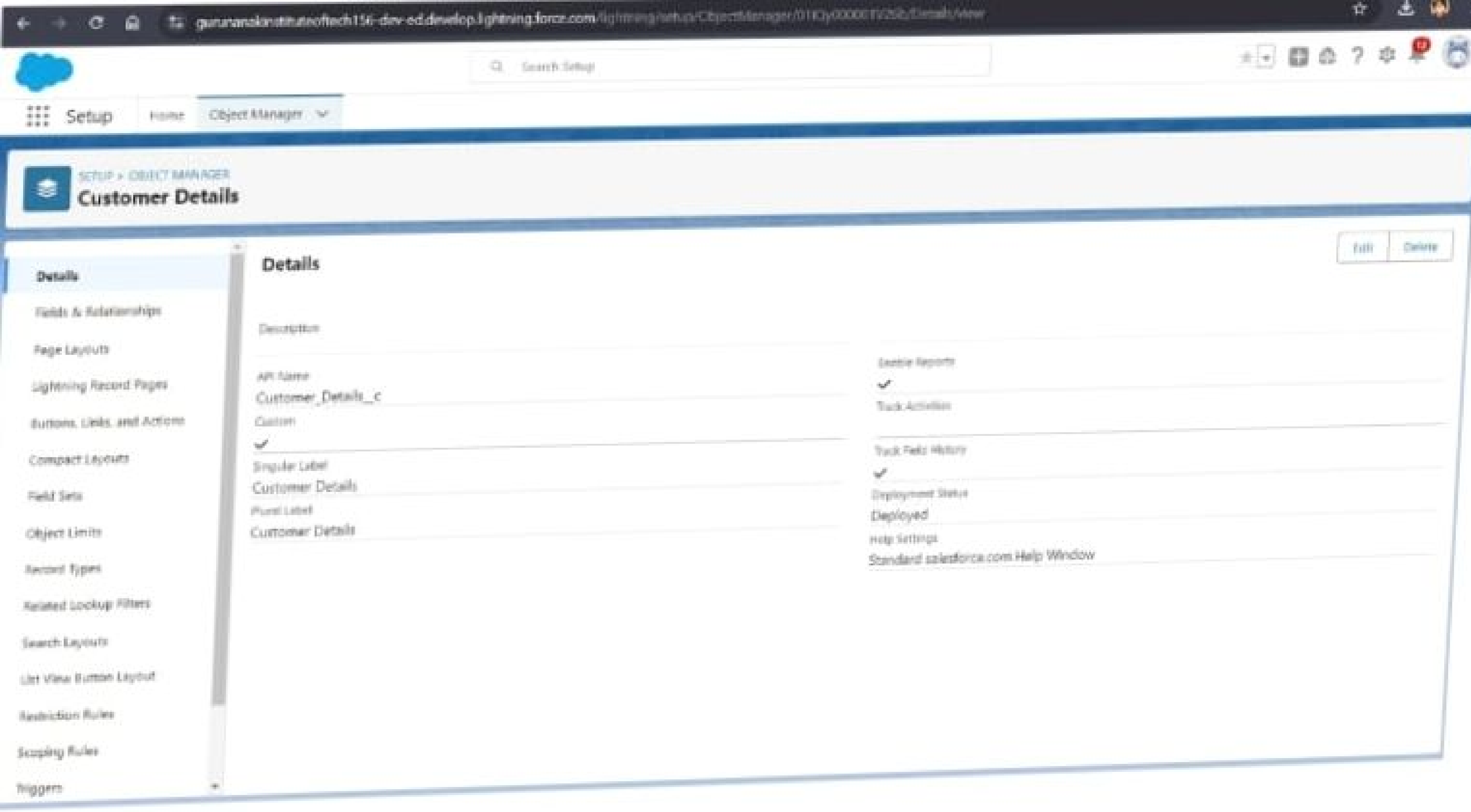
To create an object:

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

1. Enter the label name >> Customer Details
2. Plural label name >> Customer Details
3. Enter Record Name Label and Format

- Record Name >> Customer Name
- Data Type >> Text

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



Create Appointment Object

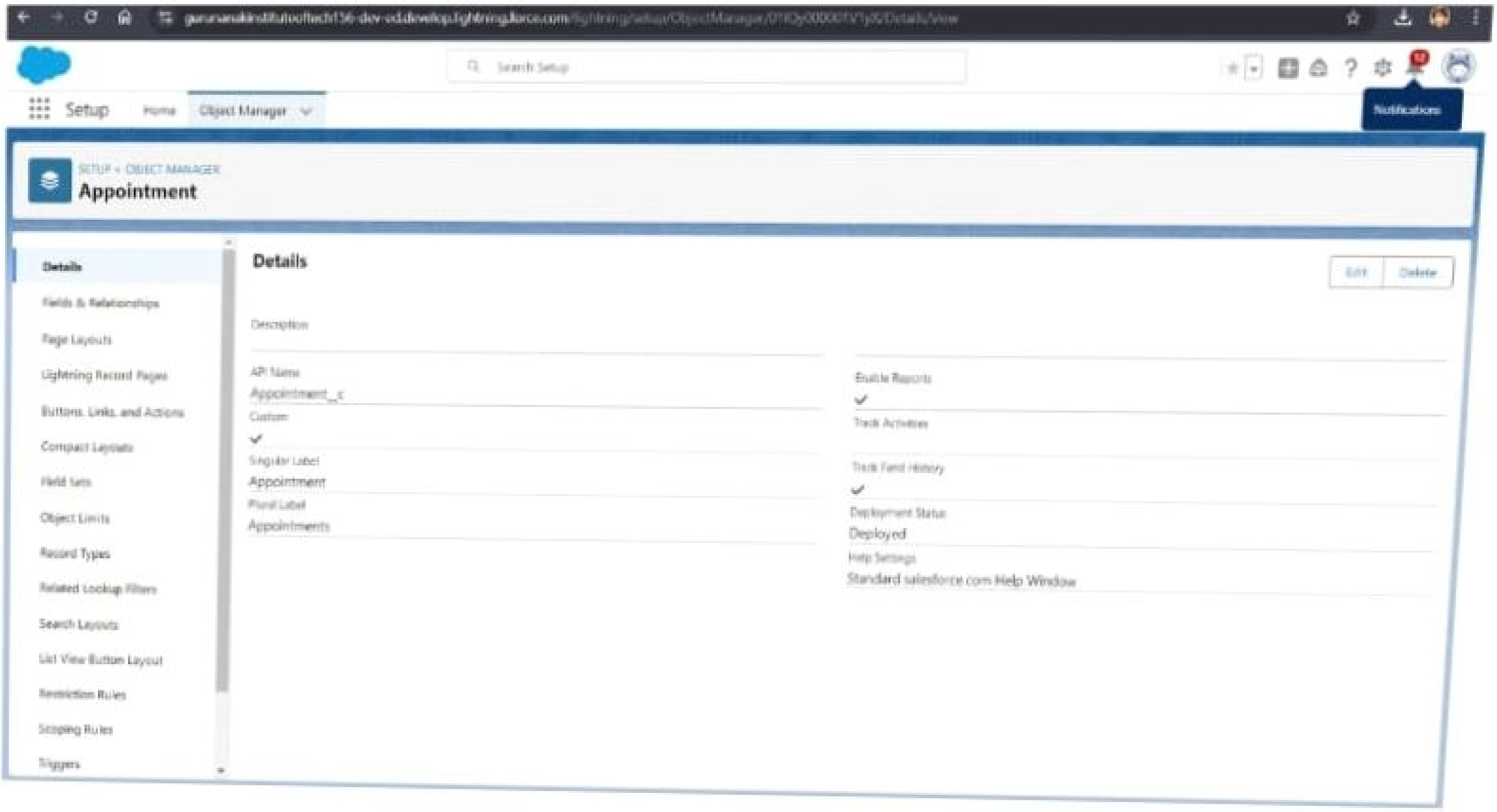
To create an object:

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

1. Enter the label name >> Appointment
2. Plural label name >> Appointments
3. Enter Record Name Label and Format

- Record Name >> Appointment Name
- Data Type >> Auto Number
- Display Format >> app-{000}
- Starting number >> 1

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



Create Service records Object

To create an object:

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

1. Enter the label name >> Service records
2. Plural label name >> Service records
3. Enter Record Name Label and Format

- Record Name >>Service records Name
- Data Type >> Auto Number
- Display Format >> ser-{000}
- Starting number >> 1

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

Create Billing details and feedback Object

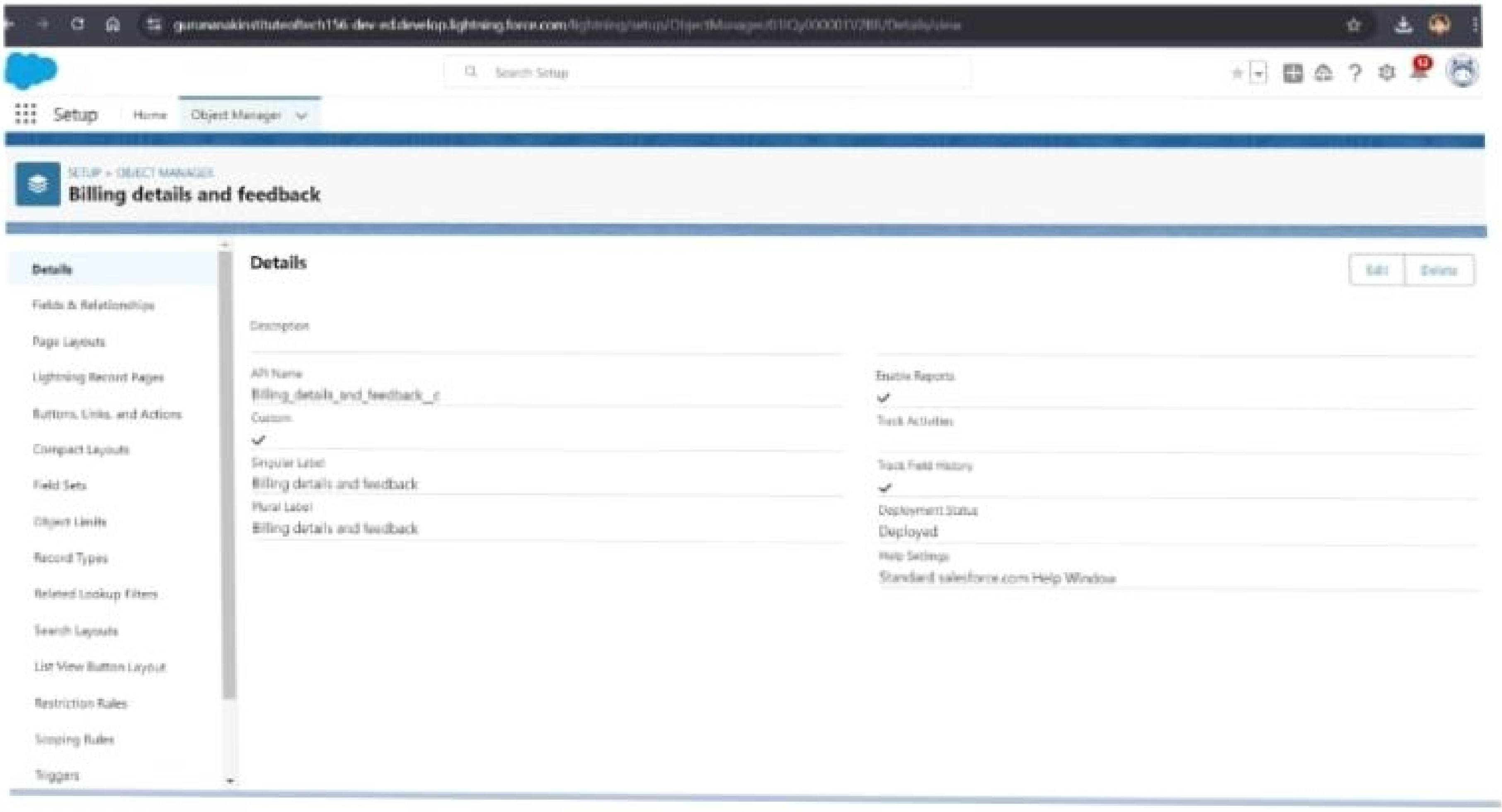
o create an object:

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

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

- Record Name >> Billing details and feedback Name
- Data Type >> Auto Number
- Display Format >> bill-{000}
- Starting number >> 1

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

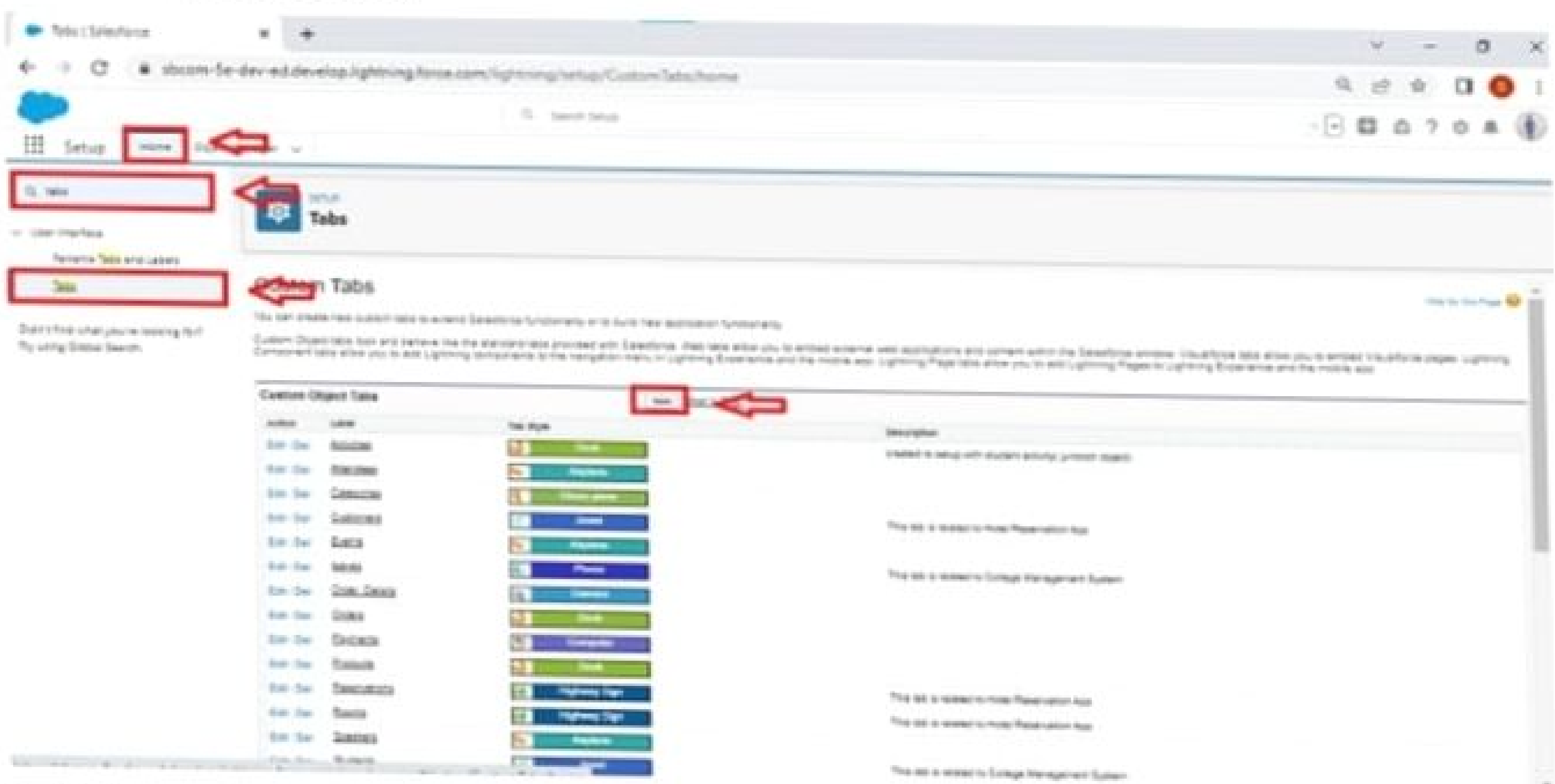


TASK 3:

Creating a Custom Tab

To create a Tab:(Customer Details)

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



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


New Custom Object Tab
Step 1 of 3
Step 1. Enter the Details
Choose the custom object for this new custom tab. Fill in other details.
Select an existing custom object or create a new custom object now.
Object
Customer Details
Tab Style
(Optional) Choose a Home Page Custom Link to show as a splash page the first time your users click on this tab.
Splash Page Custom Link
--None--
Enter a short description.
Description
Next
Cancel


Tab Style Selector
Create your own style
Hide styles which are used on other tabs
Airplane
Bank[1]
Books
Building
Can
Cell phone
Circle
CRT TV
Dice
Form
Hammer
Heart[1]
Hot Air Balloon
Keys
Alarm clock
Bell
Bottle
Building Block
Car
Chalkboard
Compass
Cup
Factory
Gears
Hands
Helicopter
Insect
Laptop
Apple
Big top
Box
Caduceus
Castle
Chess piece
Computer
Desk[1]
Fan
Globe
Handsaw
Hexagon
IP Phone
Leaf
Balls
Boat[1]
Bridge
Camera
CD/DVD
Chip
Credit card
Diamond
Flag
Guitar
Headset
Highway Sign
Jewel
Lightning
Save
Cancel

To create a Tab:(Appointment)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. Select Object(Appointment) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .
3. Make sure that the Append tab to users' existing personal customizations is checked.
4 . Click save

To create a Tab:(Service Records)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. 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 .
3. Make sure that the Append tab to users' existing personal customizations is checked.
4 . Click save

To create a Tab:(Billing details and feedback)

1. Go to setup page >> type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
2. Select Object(Billing details and feedback) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .
3. Make sure that the Append tab to users' existing personal customizations is checked.
4 . Click save

TASK 4:

Create a Lightning App

To create a lightning app page:

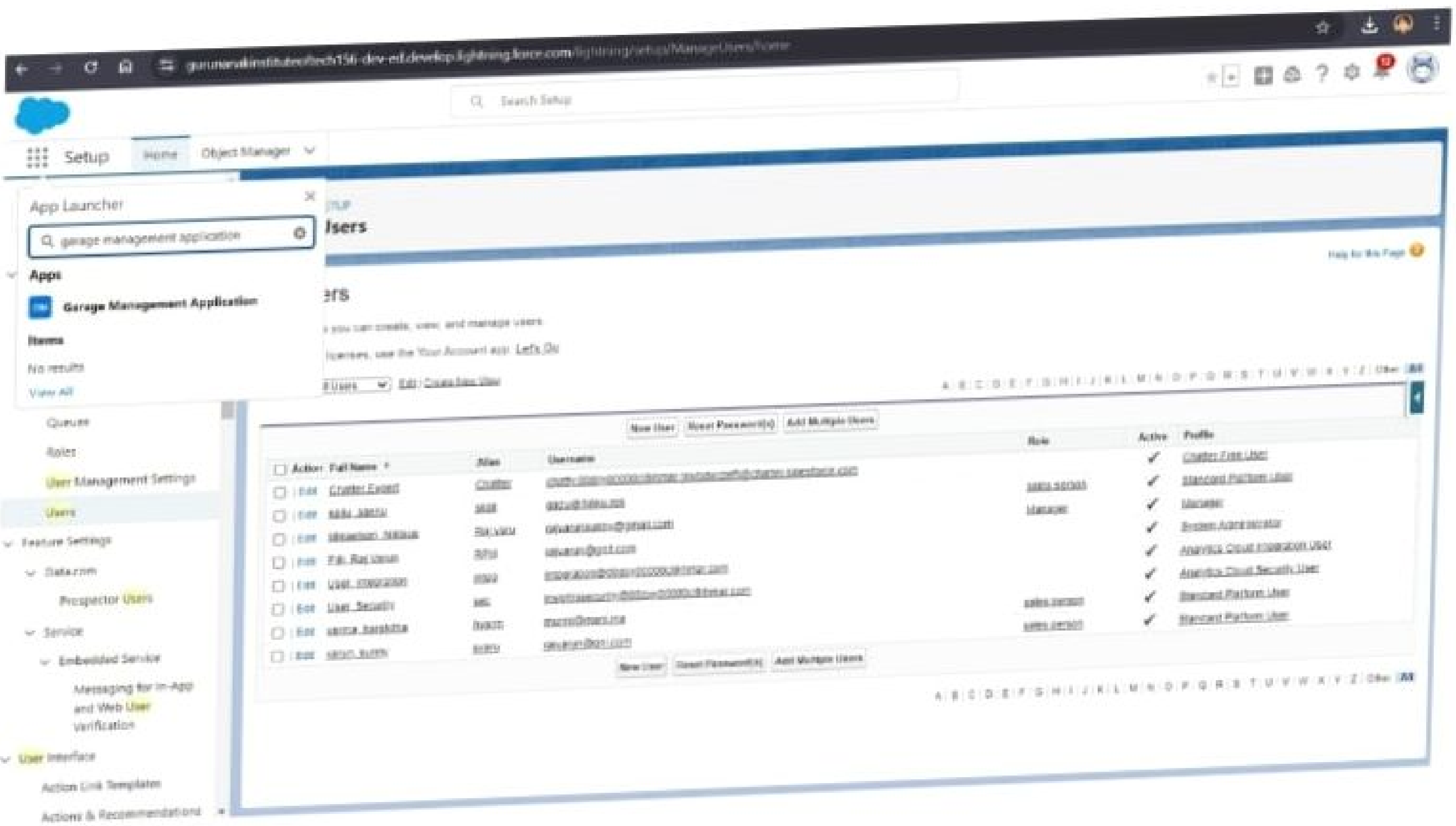
1. Go to setup page >> search "app manager" in quick find >> select "app manager" >> click on New lightning App.

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

3. To Add Navigation Items:
4. Select the items (Customer Details,Appointments, Service records, Billing details and feedback, Reports and Dashboards) f rom the search bar and move it using the arrow button >> Next.

5. To Add User Profiles:

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



TASK 5:

Creation of fields for the Customer Details object

1. To create fields in an object:

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

2. Now click on "Fields & Relationships" >> New

3. Select Data Type as a "Phone"

4. Click on next.

5. Fill the Above as following:

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

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

2. To create another fields in an object:

1. Go to setup >> click on Object Manager >> type object name(Customer Details) in search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select Data type as a "Email" and Click on Next
4. Fill the Above as following:

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

Creation of Lookup Fields

Creation of Lookup Field on Appointment Object :

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

2. Now click on "Fields & Relationships" >> New

3. Select "Look-up relationship" as data type and click Next.
4. Select the related object " Customer Details" and click next.
5. Next >> Next >> Save.

Note: Make sure you complete Activity 4 Before continuing.

Creation of Lookup Field on Service records Object :

1. Go to setup >> click on Object Manager >> type object name(Service records) in search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New
3. Select "Look-up relationship" as data type and click Next.
4. Select the related object " Appointment " and click next.
5. Make it a required field so click on Required.
6. Scroll down for Lookup Filter and click on Show filter settings.
7. Now add the filter criteria.
8. Field : Appointment: Appointment Date >> Operator : less than >> select field >> Appointment: Created Date
9. Filter type should be Required.
10. Error Message : Value does not match the criteria.
11. Enable the filter by click on Active.
12. Next >> Next >> Save.

Creation of Lookup Field on Billing details and feedback Object :

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

Creation of Checkbox Fields

Creation of Checkbox Field on Appointment Object :

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

2. Now click on "Fields & Relationships" >> New.
3. Select "Check box" as data type and click Next.
4. Give the Field Label : Maintenance service
5. Field Name : is auto populated
6. Default value : unchecked
7. Click on next >> next >> save.

Creation of Another Checkbox Field on Appointment Object :

1. Repeat the steps form 1 to 3.
2. Give the Field Label : Repairs
3. Field Nme : is auto populated
4. Default value : unchecked
5. Click on next >> next >> save.
6. Follow the same and create another checkbox with given names
7. Give the Field Label : Replacement Parts
8. Field Nme : is auto populated
9. Default value : unchecked
10. Click on next >> next >> save.

Creation of Checkbox Field on Service records Object :

1. Go to setup >> click on Object Manager >> type object name(Service records) in search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select "Check box" as data type and click Next.
4. Give the Field Label : Quality Check Status
5. Field Nme : is auto populated
6. Default value : unchecked
7. Click on next >> next >> save

Creation of date Fields

Creation of Date Field on Appointment Object :

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

Creation of Currency Fields

Creation of Currency Field on Appointment Object :

1. Go to setup >> click on Object Manager >> type object name(Appointment) in the search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select "Currency" as data type and click Next.
4. Give the Field Label : Service Amount
5. Field Nme : is auto populated
6. Click on next
7. Give read only for all the profiles in field level security for profile.
8. Click on next > > save.

Creation of Currency Field on Billing details and feedback Object :

1. Follow the same steps as mentioned above in Billing details and feedback Object.
2. Change the label name as mentioned.
3. Give the Field Label : Payment Paid
4. Field Nme : is auto populated

Creation of Text Fields

1. Go to setup >> click on Object Manager >> type object name(Appointment) in the search bar >> click on the object.
2. Now click on "Fields & Relationships" >> New.
3. Select " Text" as data type and click Next.
4. Give the Field Label : Vehicle number plate

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

Creation of Text Fields in Billing details and feedback object :

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

Creation of Picklist Fields

Creation of Picklist Fields in Service records object :

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

Creation of Picklist Fields in Billing details and feedback object :

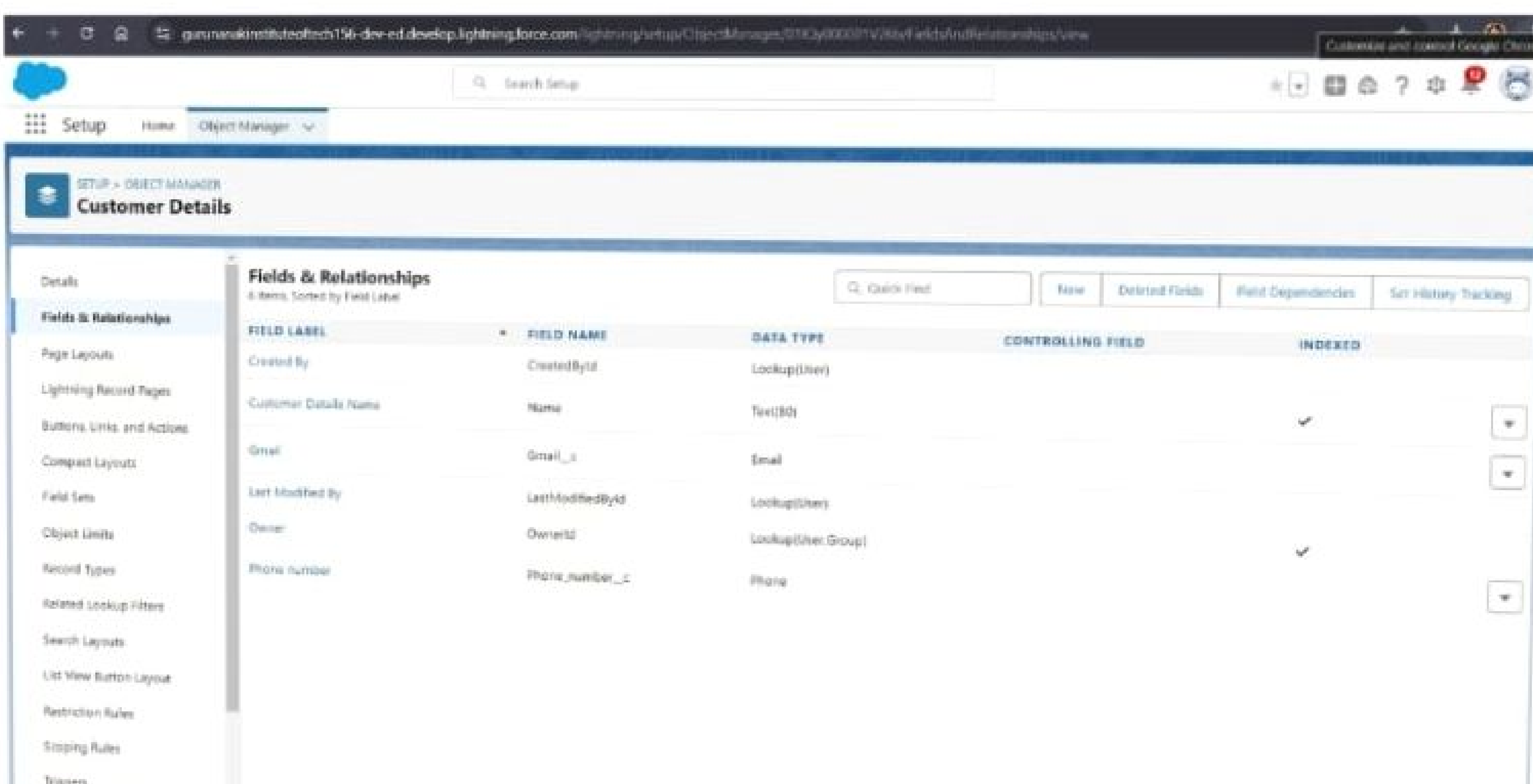
1. Go to setup >> click on Object Manager >> type object name(Billing details and feedback) in search bar >> click on the object.
2. Click on fields & relationship >> click on New.
3. Select Data type as "Picklist" and click Next.
4. Enter Field Label as "Payment Status", under values select "Enter values, with each

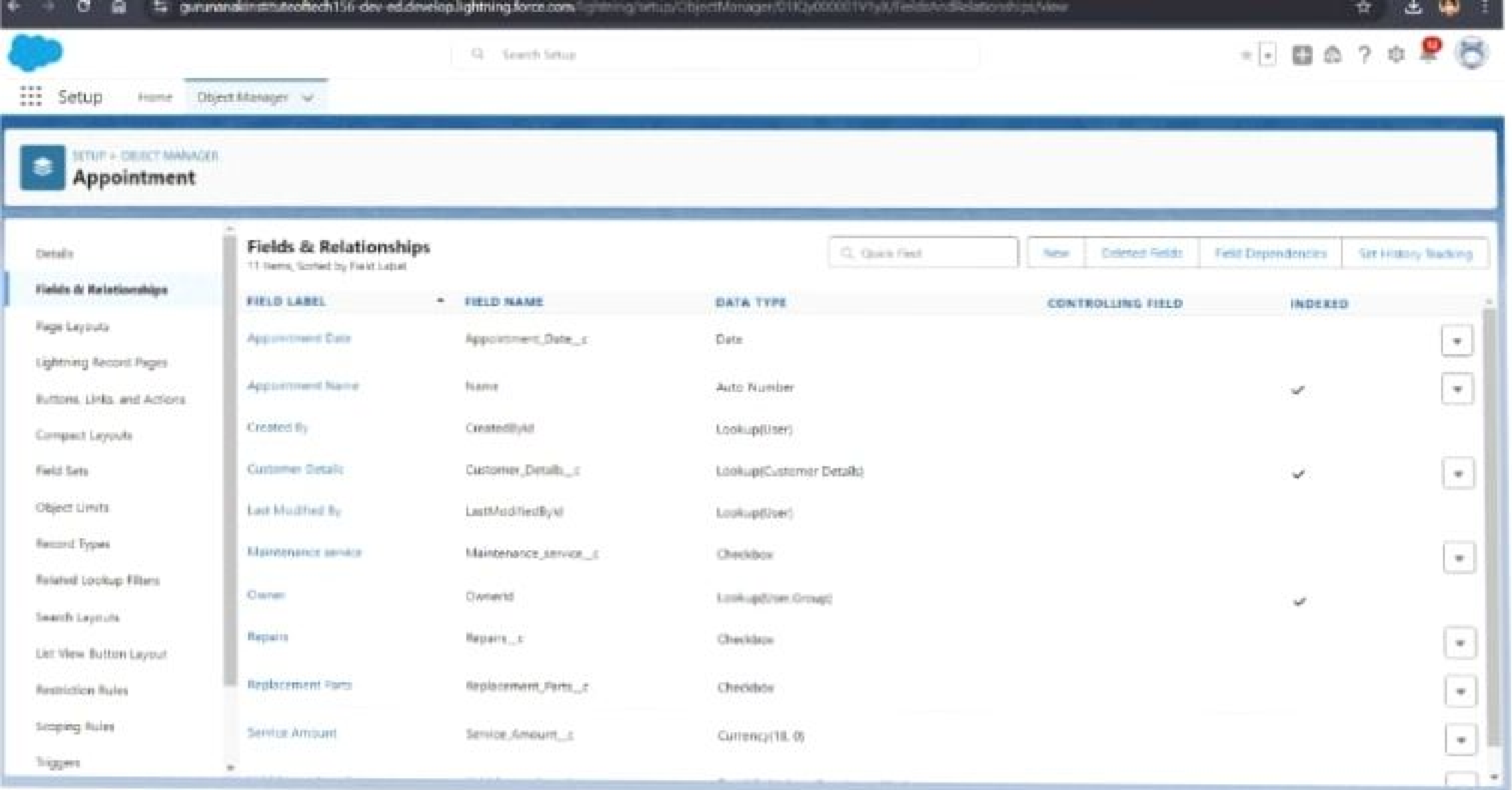
value separated by a new line" and enter values as shown below.

5. The values are: Pending, Completed.
6. Click Next.
7. Next >> Next >> Save.

Creating Formula Field in Service records Object

1. Go to setup >> click on Object Manager >> type object name(Service records) in search bar >> click on the object.
2. Click on fields & relationship >> click on New.
3. Select Data type as "Formula" and click Next.
4. Give Field Label and Field Name as "service date" and select formula return type as "Date" and click next.
5. Inser t field formula should be : CreatedDate.
6. click "Check Syntax" .
7. Click next >> next >> Save.





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New
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Set History Tracking
FIELD LABEL
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Lookup(User)
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Repairs
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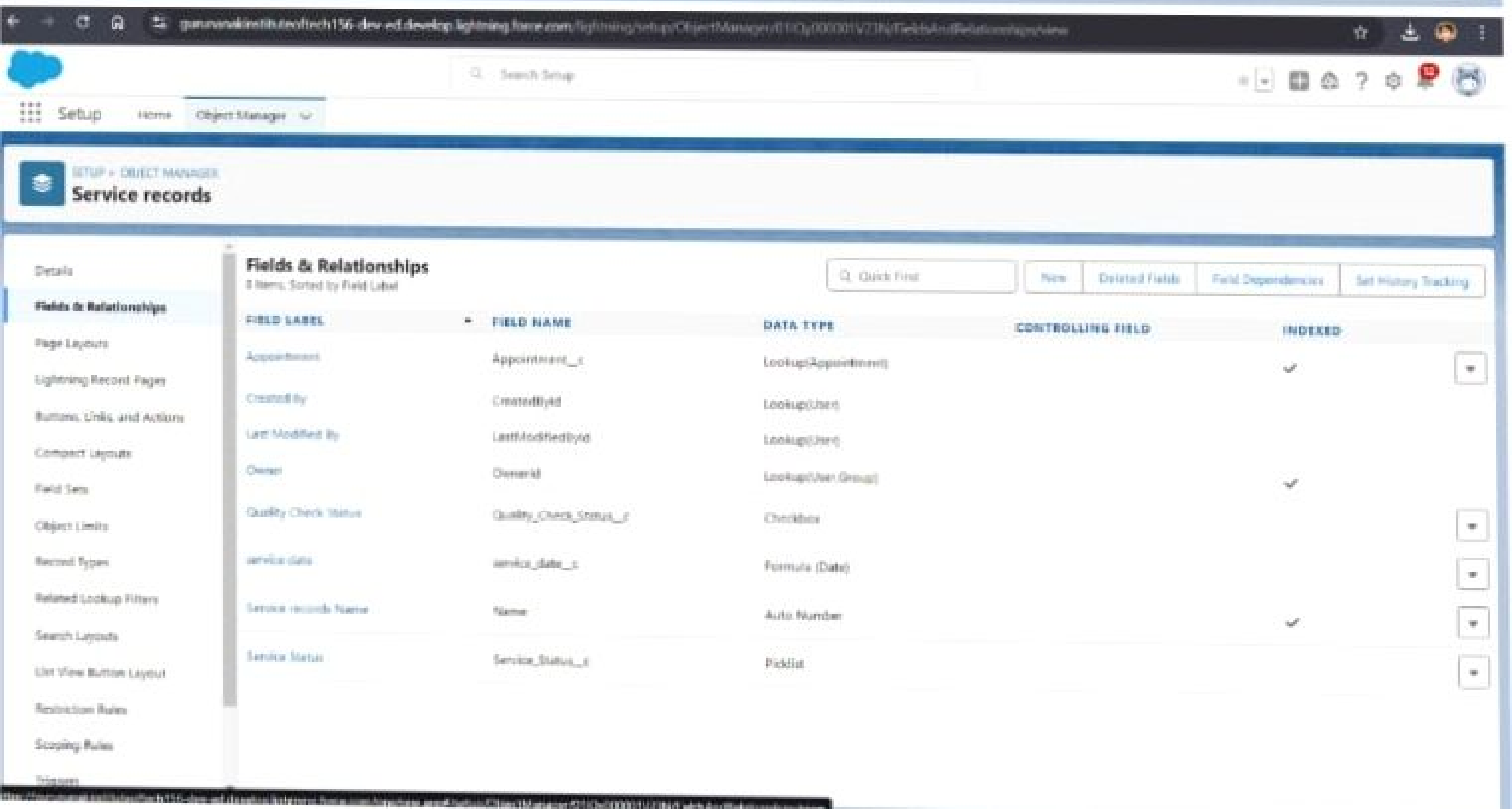
Replacement Parts
Replacement_Parts__c
Checkbox
Service Amount
Service_Amount__c
Currency(18, 0)



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FIELD LABEL
FIELD NAME
DATA TYPE
CONTROLLING FIELD
INDEXED
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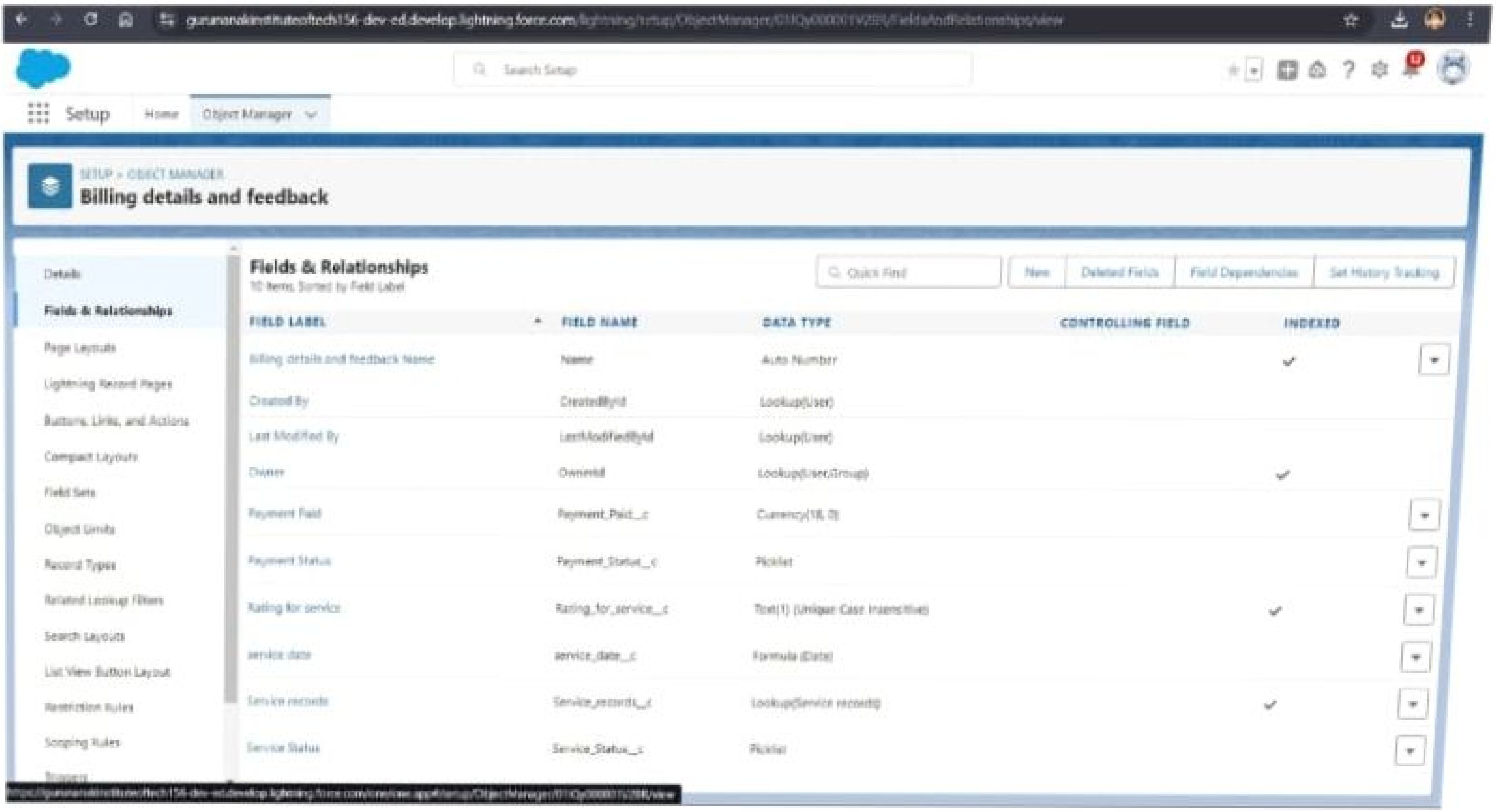
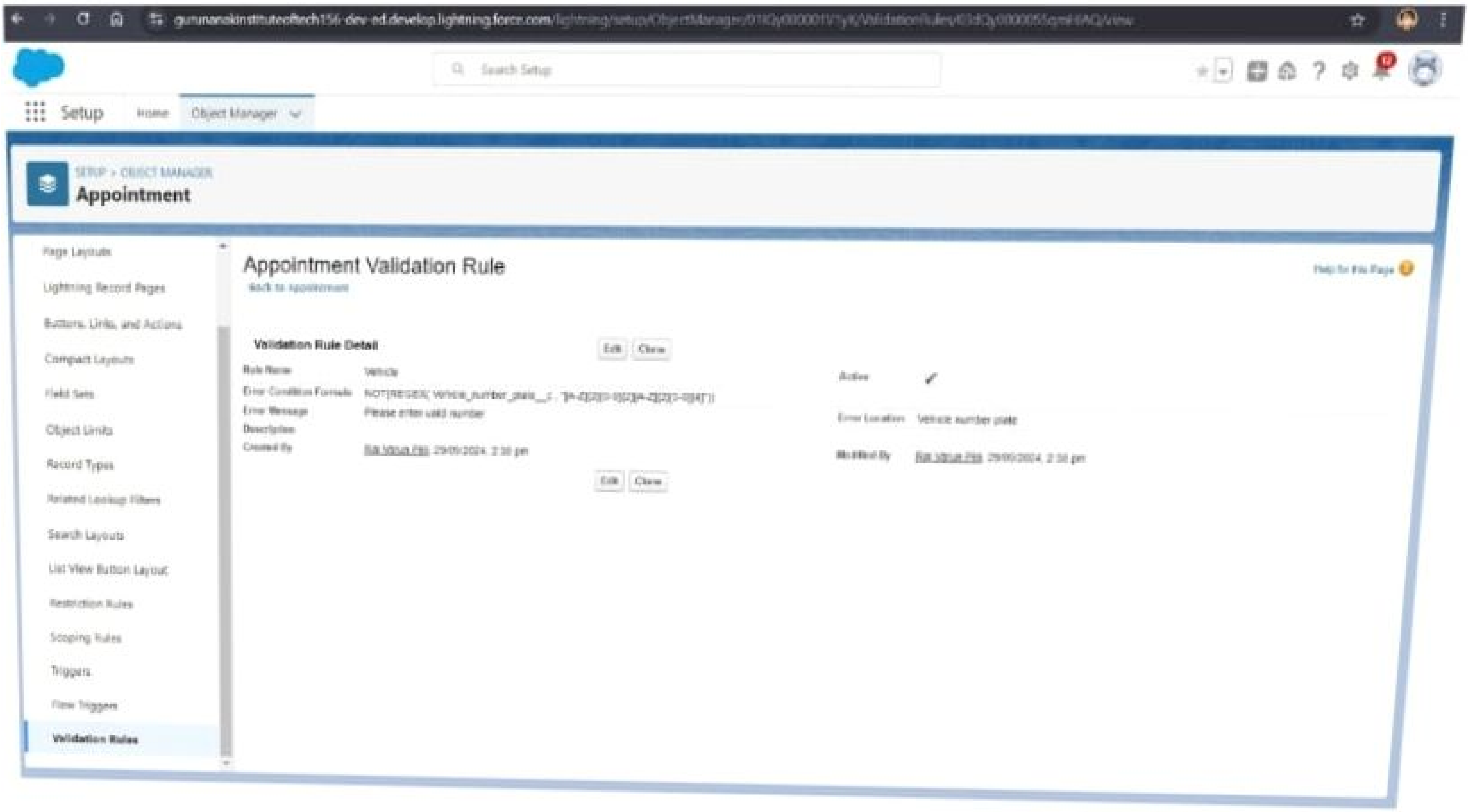
Appointment__c
Lookup(Appointment)
Created By
CreatedById
Lookup(User)
Last Modified By
LastModifiedById
Lookup(User)
Owner
OwnerId
Lookup(User,Group)
Quality Check Status
Quality_Check_Status__c
Checkbox
service date
service_date__c
Formula (Date)
Service records Name
Name
Auto Number
Service Status
Service_Status__c
Picklist



TASK 6:

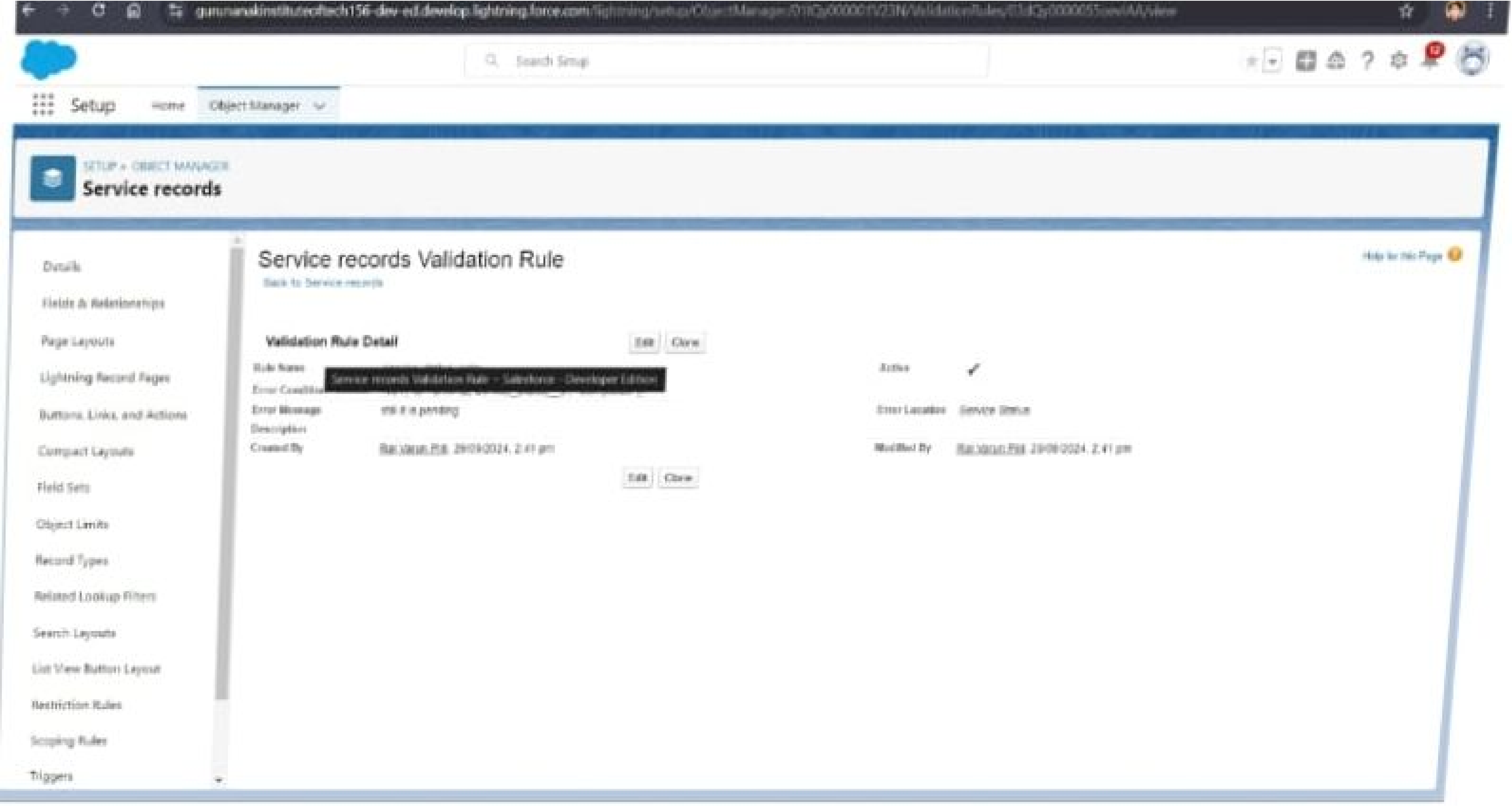
To create a validation rule to an Appointment Object

1. Go to the setup page >> click on object manager >> From drop down click edit for Appointment object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as " Vehicle ".
4. Inser t the Error Condition Formula as : - NOT(REGEX(Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))
5. Enter the Error Message as "Please enter vaild number ", select the Error location as Field and select the field as "Vehicle number plate", and click Save.



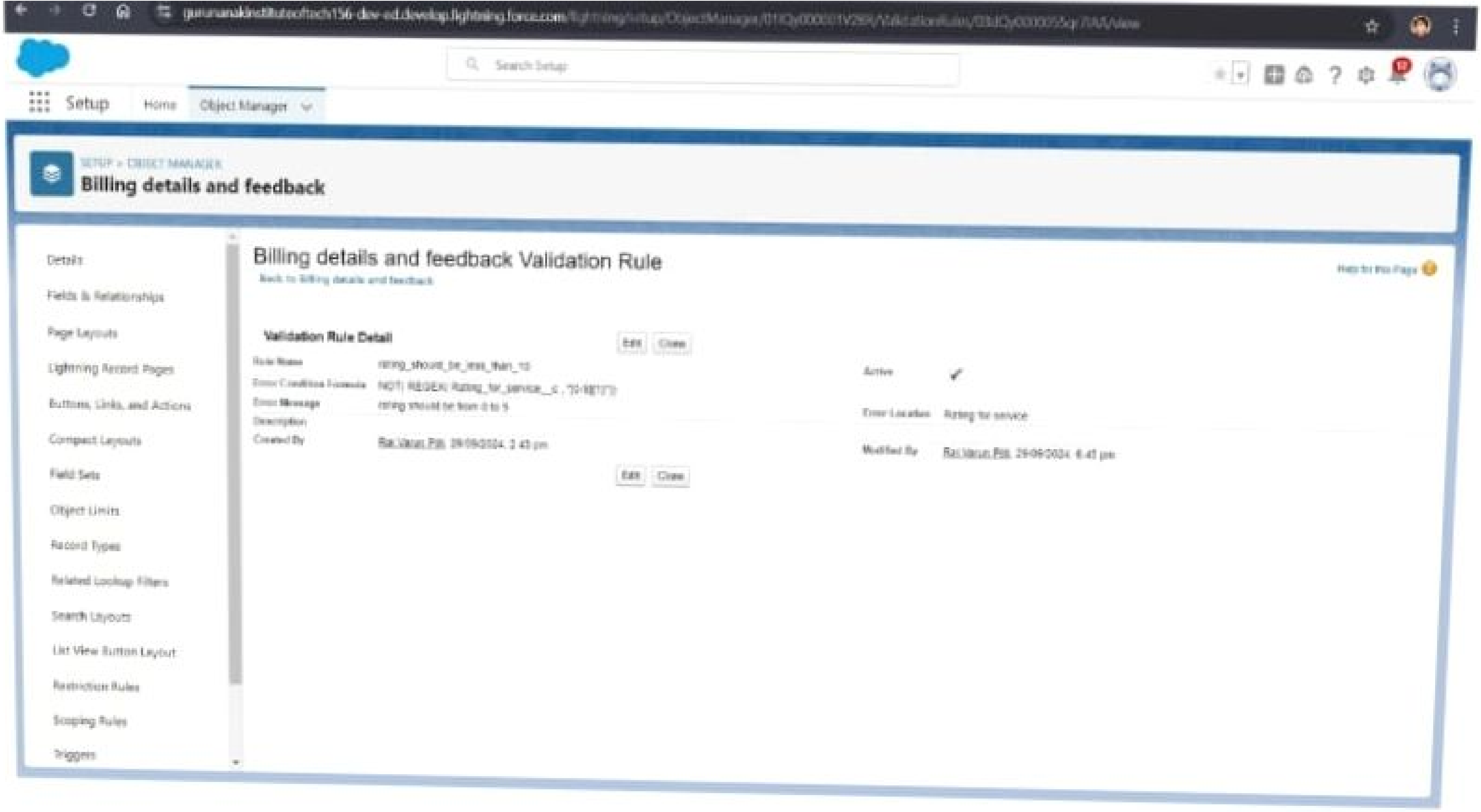
To create a validation rule to an Service records Object

1. Go to the setup page >> click on object manager >> From drop down click edit for Ser vice records objec t .
2. Click on the validation rule >> click New.
3. Enter the Rule name as " service_status_note ".
4. Inser t the Error Condition Formula as : -
   NOT(ISPICKVAL(Service_Status__c , "Completed"))
5. Enter the Error Message as "still it is pending", select the Error location as Field and selec t the field as " Ser vice status", and click Save.



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

1. Go to the setup page >> click on object manager >> From drop down click edit for Billing details and feedback object.
2. Click on the validation rule >> click New.
3. Enter the Rule name as " rating_should_be_less_than_5".
4. Inser t the Error Condition Formula as : -
   NOT(REGEX(Rating_for_service__c , "[1-5]{1}"))
5. Enter the Error Message as " rating should be f rom 1 to 5", select the Error location as Field and select the field as "Rating for Service", and click Save.



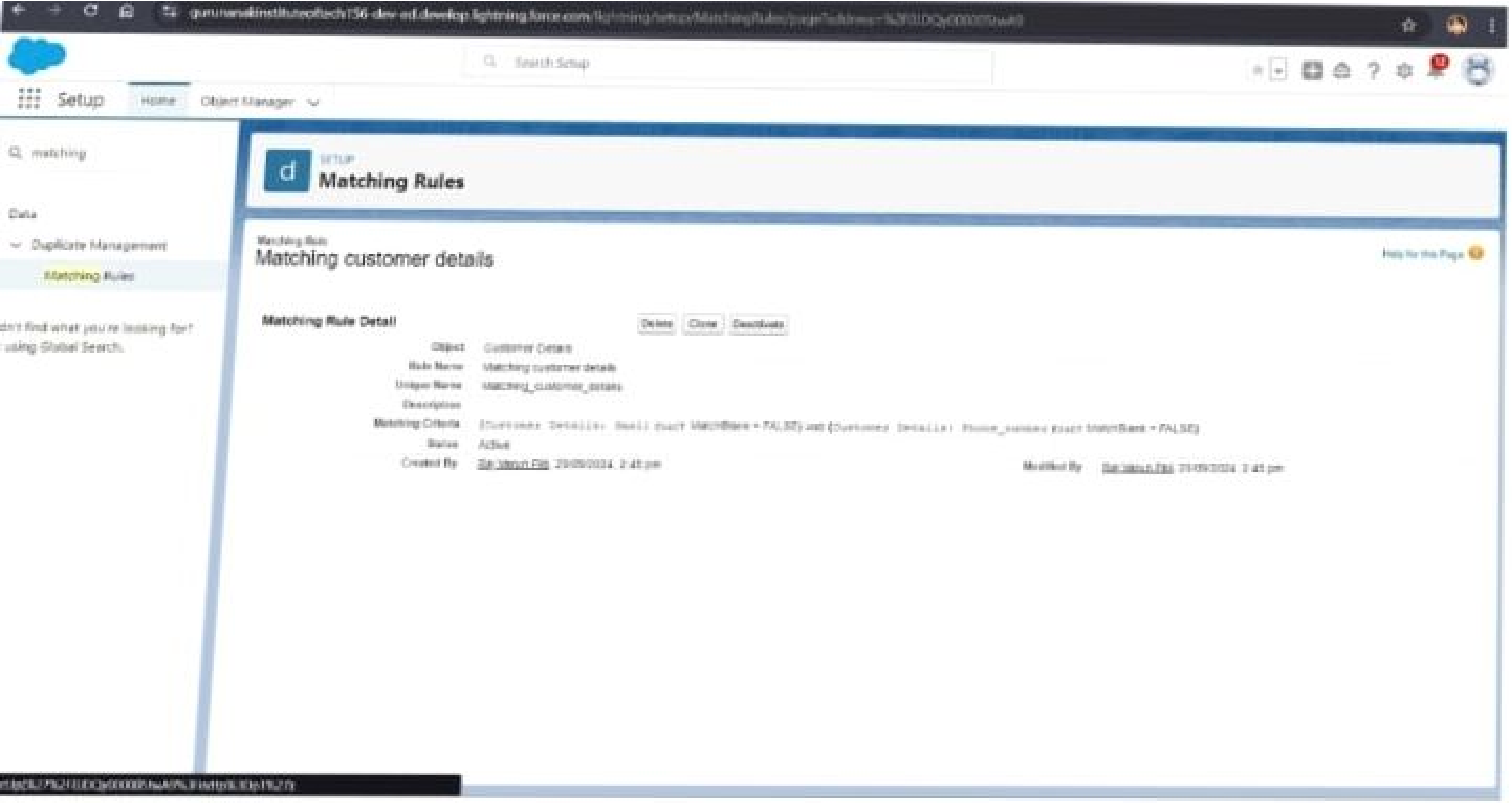
TASK 7:

To create a matching rule to an Customer details Object

1. Go to quick find box in setup and search for matching Rule.
2. Click on matching rule >> click on New Rule.
3. Select the object as Customer details and click Next.
4. Give the Rule name : Matching customer details
5. Unique name : is auto populated
6. Define the matching criteria as
7.

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

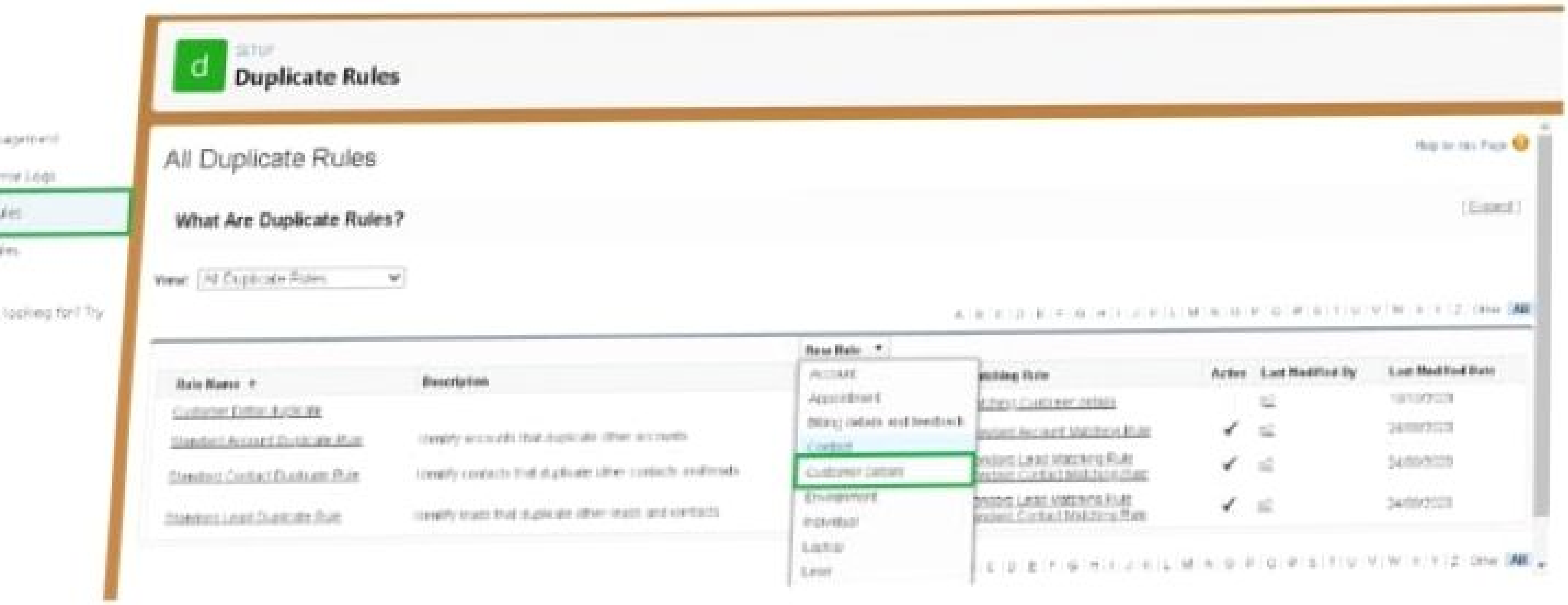
8. Click save.
9. After Saving Click on Activate.

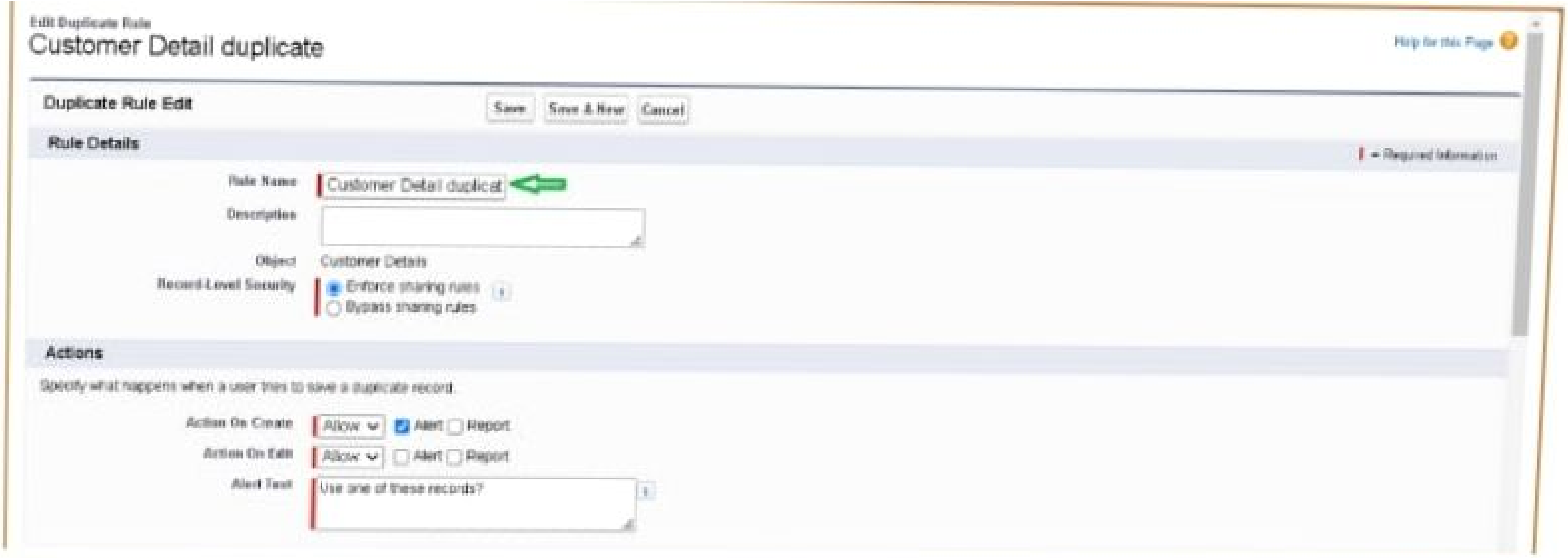


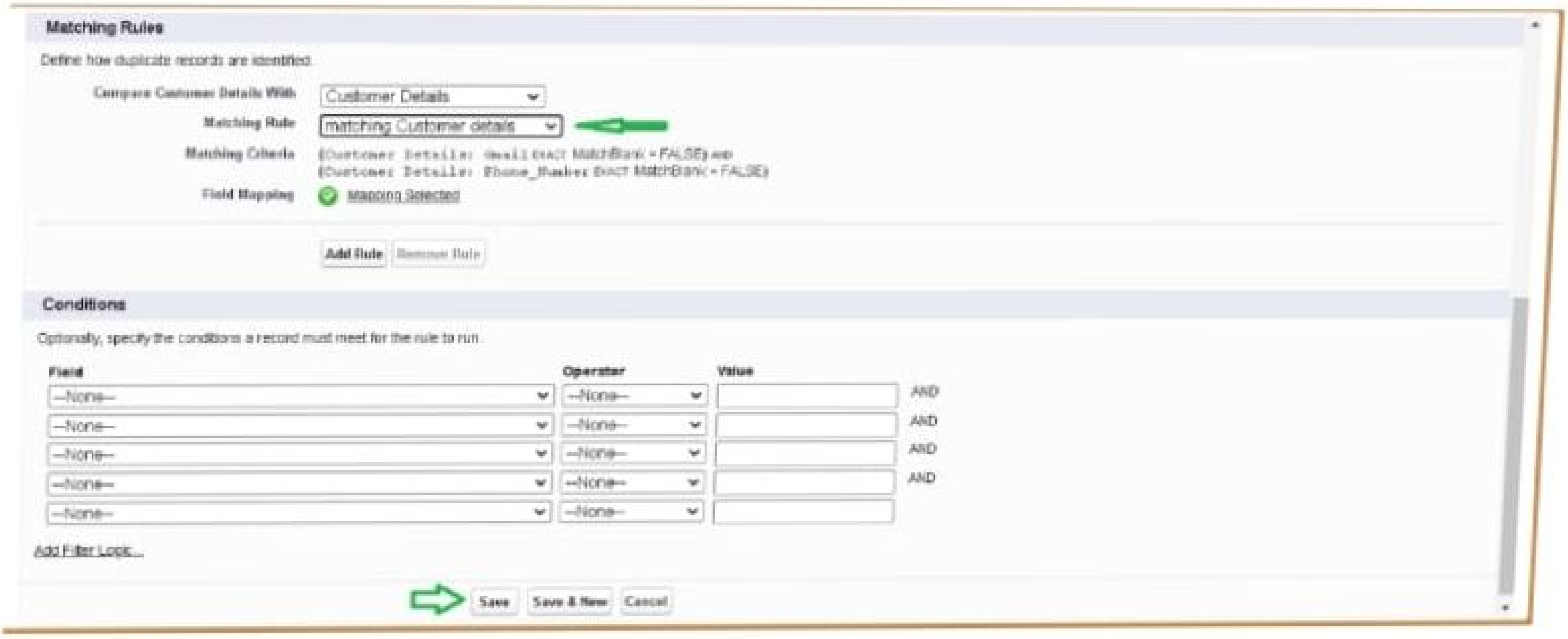
create a Duplicate rule to an Customer details ject

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







TASK 8:

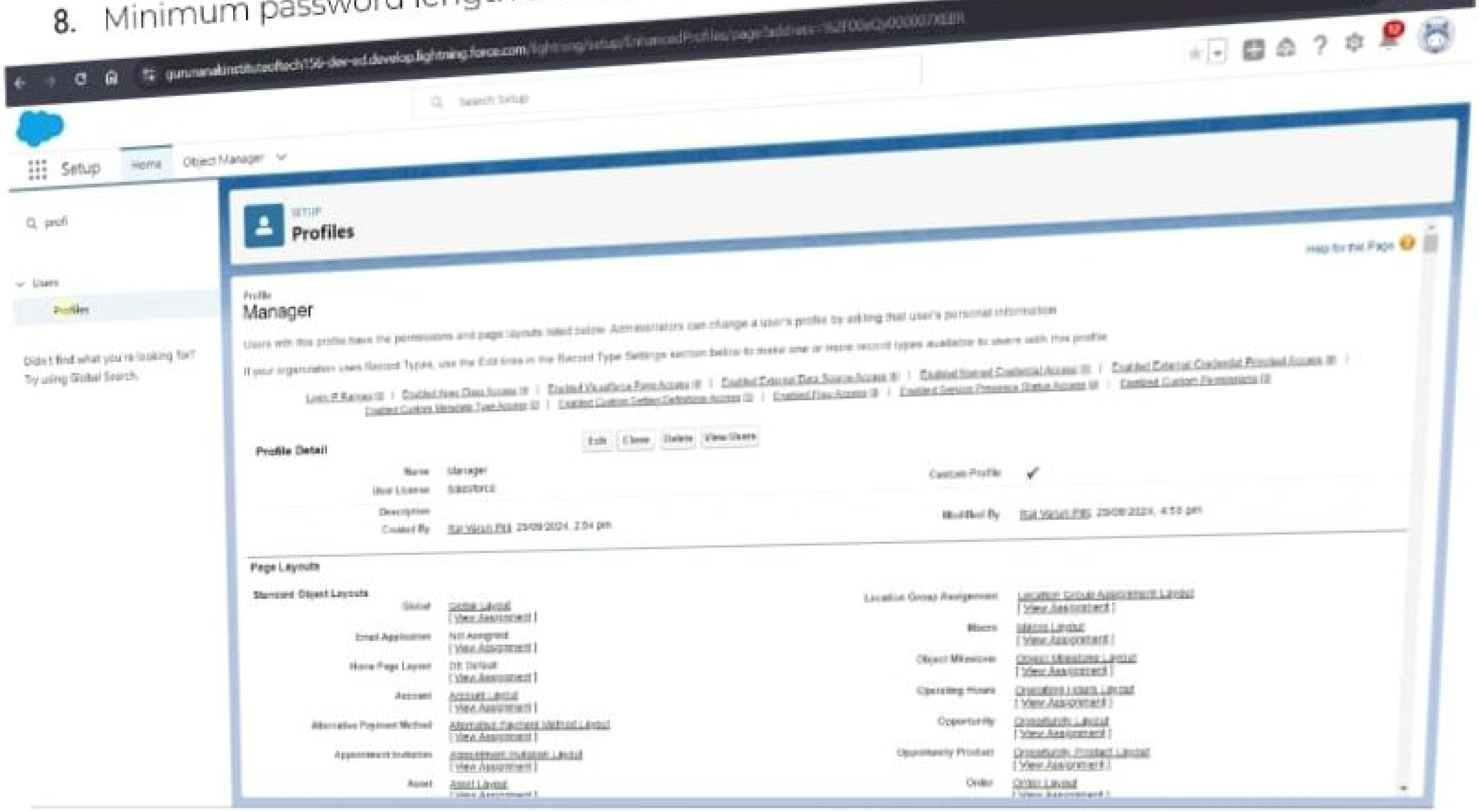
Manager Profile

To create a new profile:

1. Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (Manager) >> Save.
2. While still on the profile page, then click Edit.
3. Select the Custom App settings as default for the Garage management.
4. Scroll down to Custom Object Permissions and Give access permissions for Appointments,Billing details and feedback , service records and customer details objects as mentioned in the below diagram.
5. Changing the session times out after should be " 8 hours of inactivity".
6. Change the password policies as mentioned :

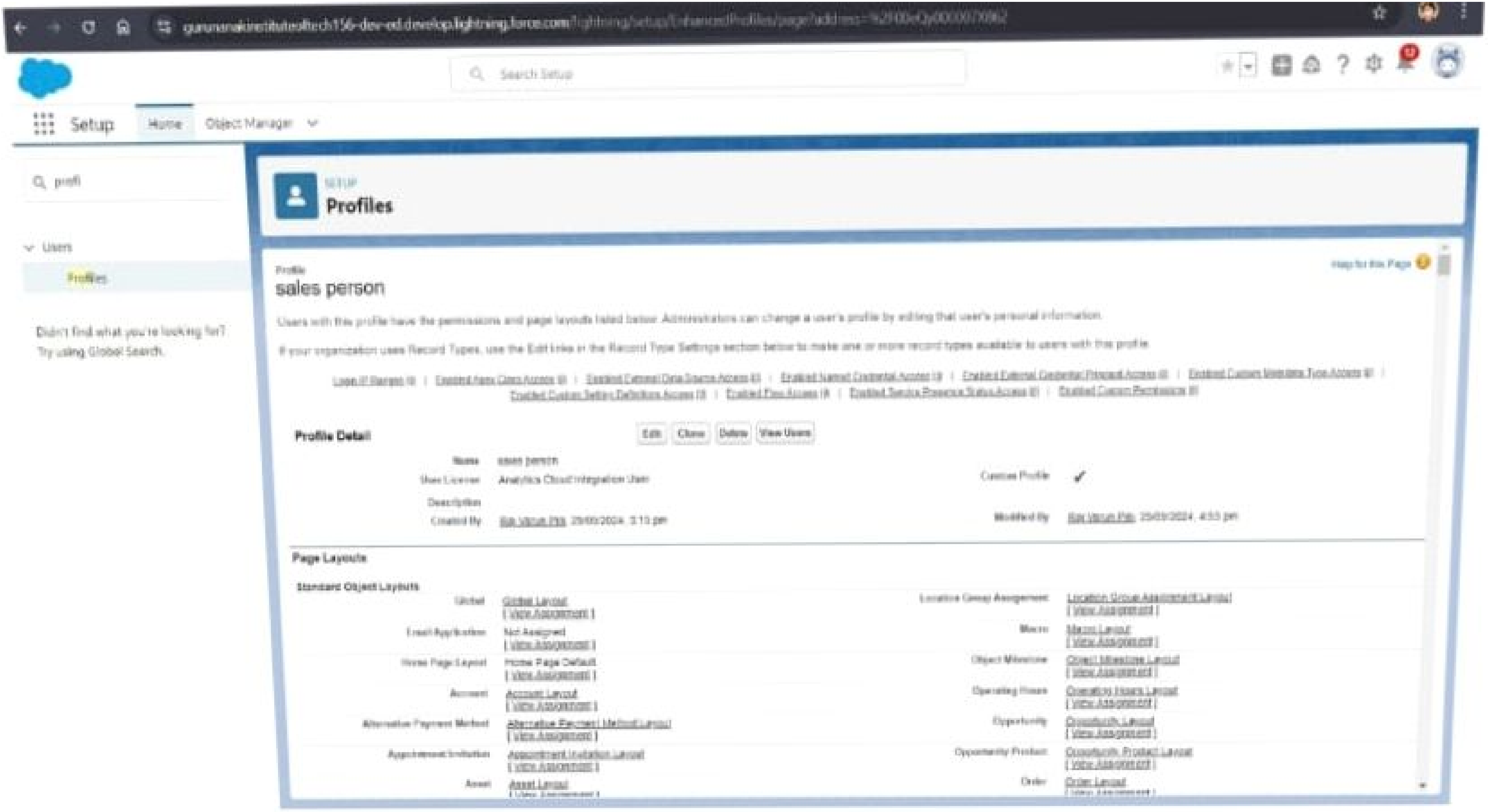
7. User passwords expire in should be " never exp

8. Minimum password length should be " 8 ", and click save.



sales person Profile

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



TASK 9:

Creating Manager Role

Creating Manager Role:

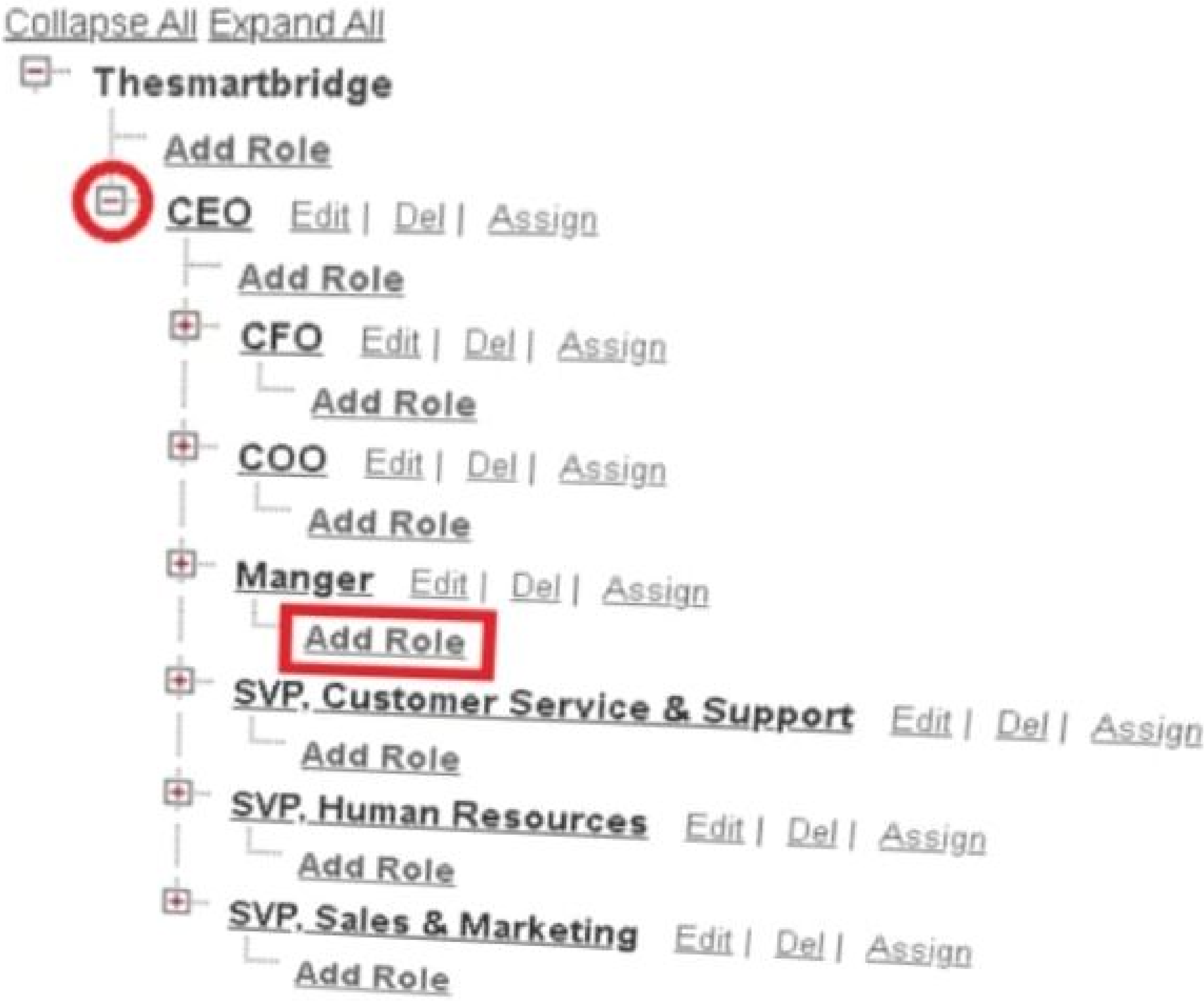
1. Go to quick find >> Search for Roles >> click on set up roles.
2. Click on Expand All and click on add role under whom this role works
3. Give Label as "Manager " and Role name gets auto populated. Then click on Save.

Creating another roles

Creating another two roles under manager

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

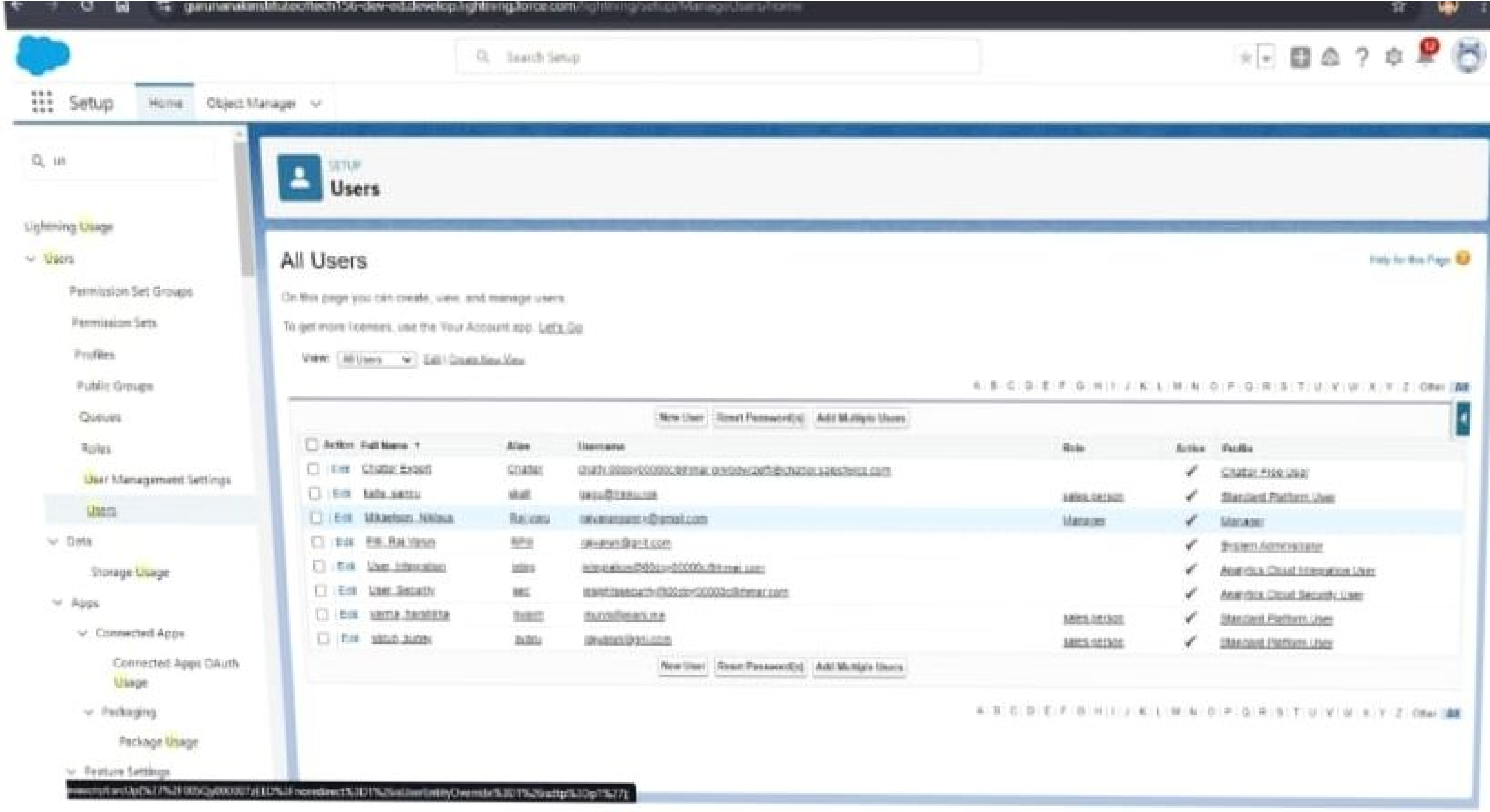
Give Label as "sales person" and Role name gets auto populated. Then click on Save.



TASK 10:

Create User

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



creating another users

1. Repeat the steps and create another user using
   1. Role : sales person
   2. User licence : Salesforce Platform
   3. Profile : sales person

Note : create atleast 3 users with these permissions.

TASK 11:

Creating New Public Group

1. Go to setup >> type users in quick find box >> select public groups >> click New.
2. Give the Label as "sales team".
3. Group name is autopopulated.
4. Search for Roles.
5. In Available Members select Sales person and click on add it will be moved to selected member.
6. Click on save.