



# **Salesforce Implementation of Automobile Service Center**

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## INTRODUCTION

Customer Relationship Management (*also known as CRM*) is a core aspect of any organization to improve their business relationships and attract new customers, With the introduction of cloud applications it has become easier for the companies to be continuously connected to customers on the go by developing mobile and web applications. CRM plays an important part to understand the user interactions and develop a relationship to retain the customers for a longer period. There are many CRM applications like Zoho, Microsoft Dynamics, Apptivo and so on. The most popular cloud application among these group is Salesforce.



Salesforce is a cloud computing enterprise situated with its headquarters in San Francisco, California. It was developed to serve as Software as a Service (SaaS) and later extended its functionality to Sales Cloud, Data Cloud, Community Cloud, App Cloud etc.,

Using this platform, it is easy to build applications, leverage in built functionalities to integrate customers and improve the interaction. The most striking feature of this platform is that it is possible to build an application from scratch with just mouse clicks, enabling non-programmers to utilize this platform to create their custom applications.

In this project, I have built an application for an Automobile Service Center to store the details of customers, products, service history, invoices and so on. The motive is to leverage cloud platform to build customer relationship attract more customers and automate few processes to eventually increase the profits of the service center.

## **Proposed Product**

A Salesforce application to record the operations of an automobile service center and the details of customers in an organized way to generate reports and dashboards. The application helps as a source to improve customer satisfaction and draw new customers. The present system is more of a manual approach and is disoriented. The purpose is to reduce the manual work in generating and maintaining the data and automate few processes to reduce human involvement in the process. It is a better practice to have all the data in a single place so that maintaining it becomes easy and analysis can be performed on them to develop insights of what customers expect from the company.

## **Current Scenario**

Majority of the small to medium service centers use software like excel to store the data related to customers and service related data. They do not possess centralized database to access the required data at once. They have paper based transactions and make minimum use of technology for their transactions. Every time the customers must be called once the service on the vehicle is finished, this is a time-consuming process which can be automated.

Providing certain additional features is an effective way to attract customers and be a better performer in a competitive market. To achieve this, it is necessary to understand what customers want and provide benefits accordingly. The proposed application tries to integrate the customers into the process.

## **Benefits of the Proposed System**

- Easier to access any data as all the related information will be available in a single application in the form of objects.
- Reports can be generated on service history, customer feedback, spares consumption and can be analyzed to improve quality of service and customer satisfaction.
- Recognizing the regular customers and providing more offers to them will not only attract new customers but also helps in retaining them for a longer period.
- Productivity of the employees can be measured by the reports generated of services.
- Ability to forecast the future date of service for the vehicle by utilizing the past records.

- It becomes possible to focus on particular aspect of performance by analyzing the report and improve it.
- Data stored in objects acts as a source for generating reports and dashboards for analysis.

## Entity Relationship Model

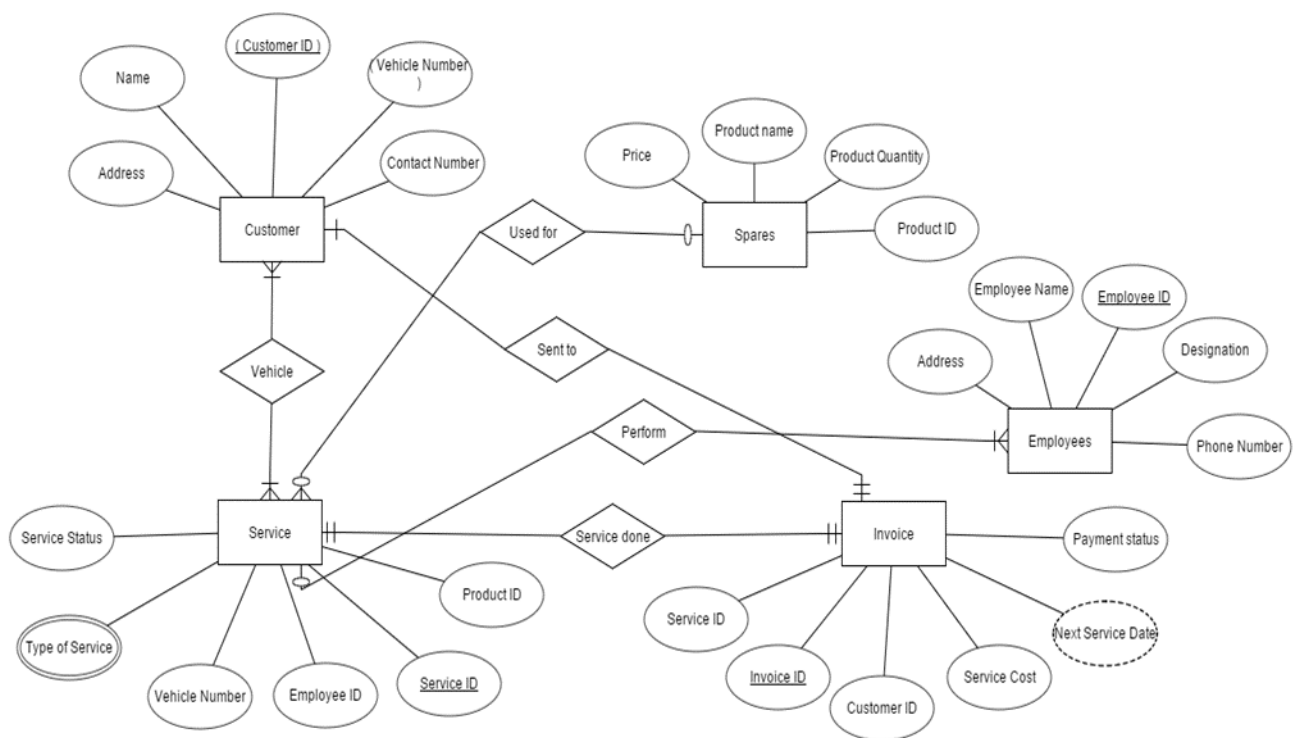


Figure 1: E-R Model for Automobile Service Center

Above diagram represents the Entity Relationship model of the proposed system. Here, the entities represent the objects and the attributes represent the fields of the objects in the application. The relationship between different entities is defined by lookup and master-detail relationships in the application.

Next section describes the process flow of an automobile service center.

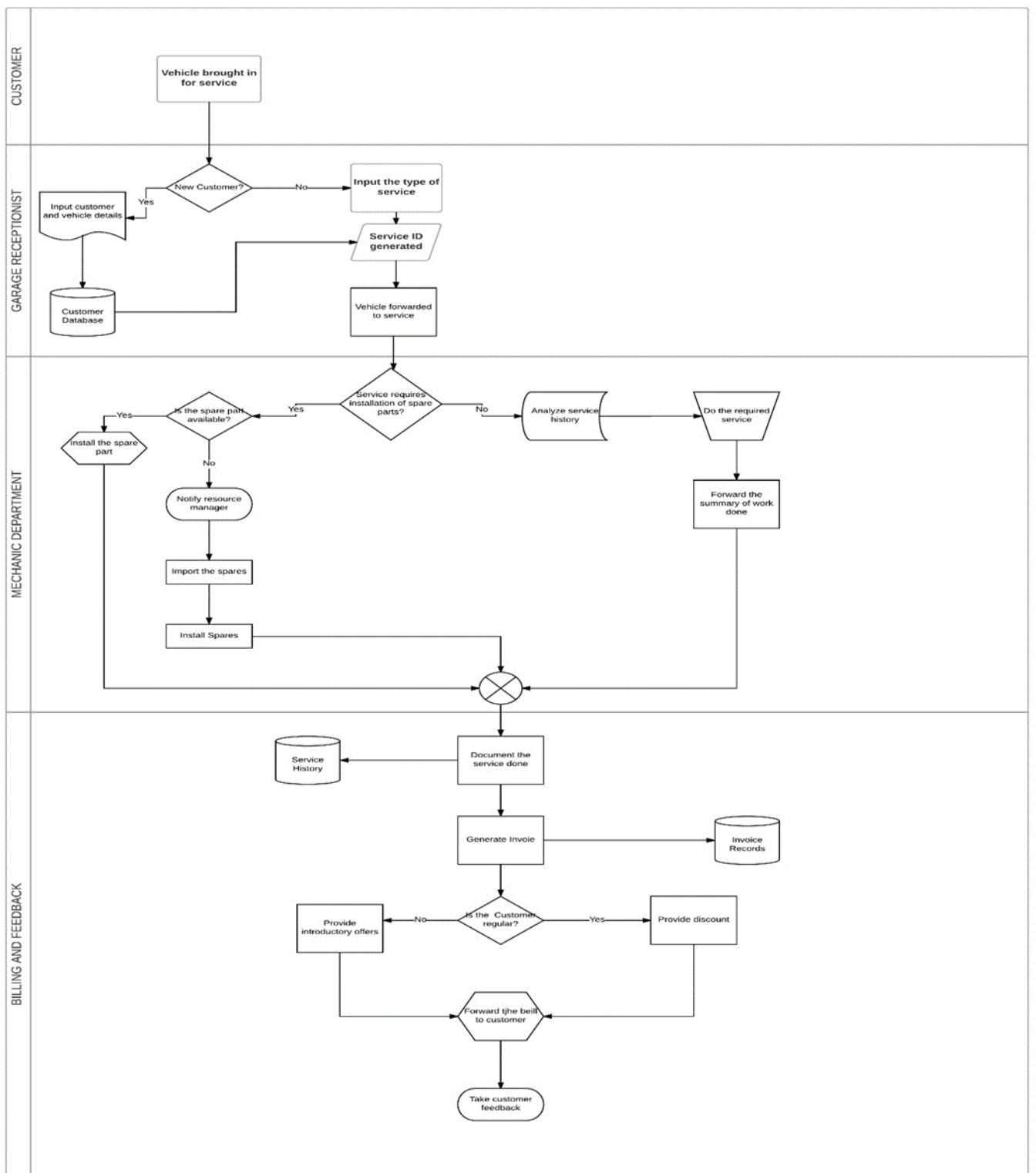


Figure 2: Process Flow Diagram

## Schema Design

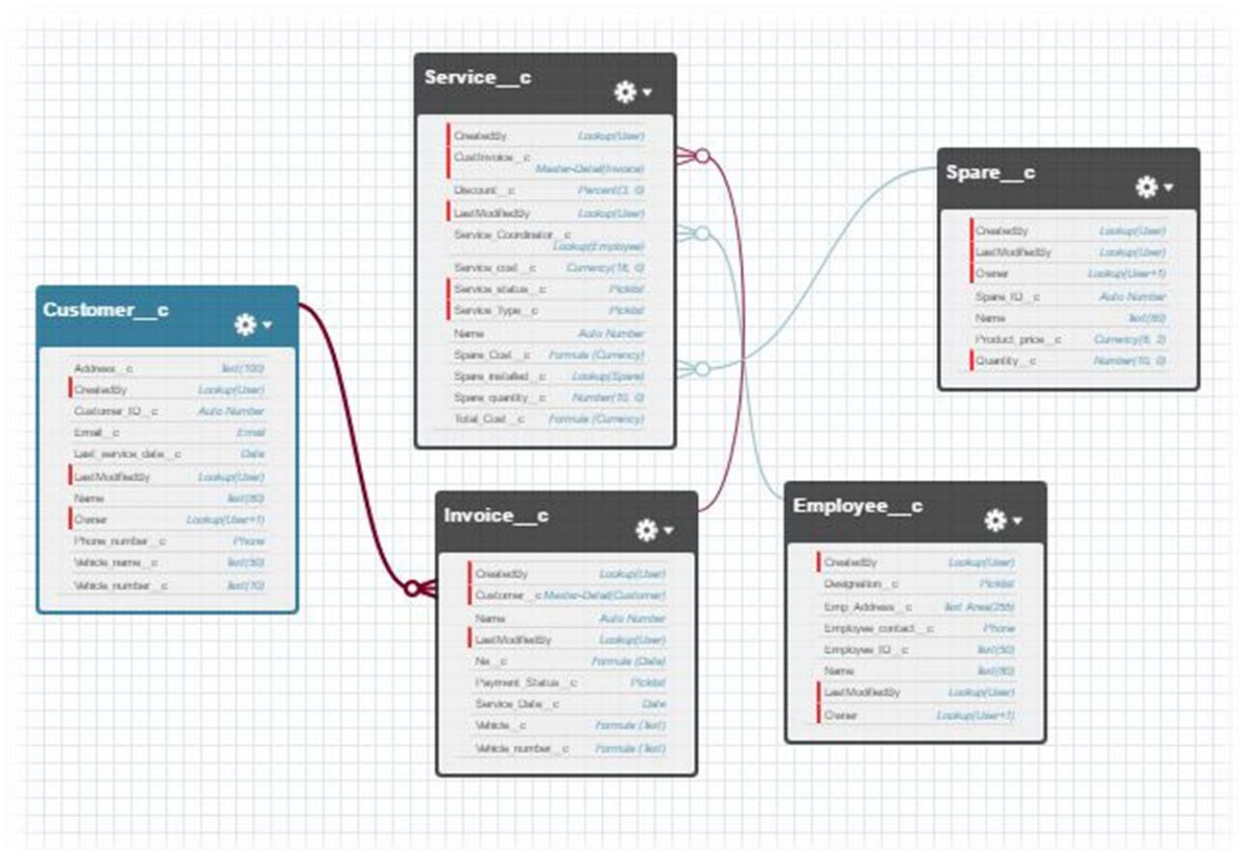


Figure 3: Schema Design

A schema is an overall structure of a database, it captures the key objects and their participation in the database.


The above diagram represents the schema design of the proposed system. It also shows the relationship between the objects.

The description of objects and the custom field for each object is explained in the next section.

## Objects

Below is the list of the objects used, their description and their fields:

### Customer

A screenshot of a software interface showing the fields for an object named 'Customer\_c'. The interface has a dark header with the object name and a settings icon. The fields are listed in a table with two columns: the field name and its data type. Some fields have a red vertical bar to their left.

Customer_c	
Address__c	Text(100)
CreatedBy	Lookup(User)
Customer_ID__c	Auto Number
Email__c	Email
Last_service_date__c	Date
LastModifiedBy	Lookup(User)
Name	Text(80)
Owner	Lookup(User+1)
Phone_number__c	Phone
Vehicle_name__c	Text(50)
Vehicle_number__c	Text(10)

This object stores the details of a customer such as their name, address, phone number, vehicle name, vehicle number etc.,

### Employee

A screenshot of a software interface showing the fields for an object named 'Employee\_c'. The interface has a blue header with the object name and a settings icon. The fields are listed in a table with two columns: the field name and its data type. Some fields have a red vertical bar to their left.

Employee_c	
CreatedBy	Lookup(User)
Designation__c	Picklist
Emp_Address__c	Text Area(255)
Employee_contact__c	Phone
Employee_ID__c	Text(50)
Name	Text(80)
LastModifiedBy	Lookup(User)
Owner	Lookup(User+1)

This object stores the details of the employees of the service center such as their name, employee ID, phone number, designation and so on.

## Spares

Spare__c		
CreatedBy		Lookup(User)
LastModifiedBy		Lookup(User)
Owner		Lookup(User+1)
Spare_ID__c		Auto Number
Name		Text(80)
Product_price__c		Currency(8, 2)
Quantity__c		Number(10, 0)

This object stores the details of list of available spares, their cost and their quantity.

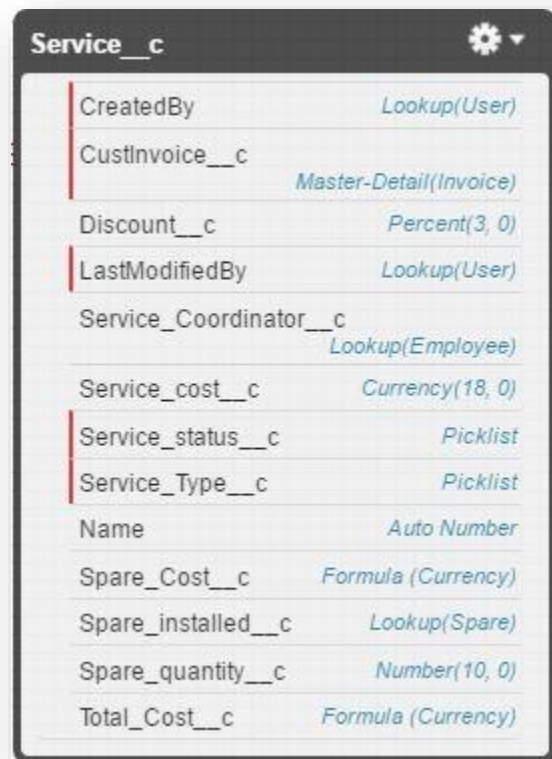
## Invoice

Invoice__c		
CreatedBy		Lookup(User)
Customer__c		Master-Detail(Customer)
Name		Auto Number
LastModifiedBy		Lookup(User)
Ne__c		Formula (Date)
Payment_Status__c		Picklist
Service_Date__c		Date
Vehicle__c		Formula (Text)
Vehicle_number__c		Formula (Text)

This object stores the invoice ID, payment status, customer information, service date and so on.



## Service



The screenshot shows the 'Service\_\_c' object field list in Salesforce. The fields are listed in a table with their respective data types and formulas. The fields are: CreatedBy (Lookup(User)), CustInvoice\_\_c (Master-Detail(Invoice)), Discount\_\_c (Percent(3, 0)), LastModifiedBy (Lookup(User)), Service\_Coordinator\_\_c (Lookup(Employee)), Service\_cost\_\_c (Currency(18, 0)), Service\_status\_\_c (Picklist), Service\_Type\_\_c (Picklist), Name (Auto Number), Spare\_Cost\_\_c (Formula (Currency)), Spare\_installed\_\_c (Lookup(Spare)), Spare\_quantity\_\_c (Number(10, 0)), and Total\_Cost\_\_c (Formula (Currency)).

Field Name	Field Type
CreatedBy	Lookup(User)
CustInvoice__c	Master-Detail(Invoice)
Discount__c	Percent(3, 0)
LastModifiedBy	Lookup(User)
Service_Coordinator__c	Lookup(Employee)
Service_cost__c	Currency(18, 0)
Service_status__c	Picklist
Service_Type__c	Picklist
Name	Auto Number
Spare_Cost__c	Formula (Currency)
Spare_installed__c	Lookup(Spare)
Spare_quantity__c	Number(10, 0)
Total_Cost__c	Formula (Currency)

This object has all the details of the service performed on the vehicle such as service id, type of service performed, spares installed (if any), discounts offered, total cost of the service. It uses lookup relationships to connect to customer and invoice object to derive some of their fields.

The following actions takes place when a vehicle is bought in for service

1. If the customer is new, his/her details are first fed into the customer object. If it is an existing customer, an invoice ID is generated as a reference for service.
2. A Service ID is generated and the details required for the service such as service type, spares required and their quantity, employee coordinating the service is populated.
3. Once the service is completed, an email is triggered to notify the user.
4. An email is triggered the day after the service to take the customer feedback on the service performed on the vehicle.
5. A reminder email is triggered the day before the service date of a particular customer to notify them about the upcoming service

# Customer

## Fields and Relationships

Standard Fields					Standard Fields Help ?
Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
	<u>Created By</u>	CreatedBy	Lookup(User)		
	<u>Last Modified By</u>	LastModifiedBy	Lookup(User)		
Edit	<u>Name</u>	Name	Text(80)		✓
Edit	<u>Owner</u>	Owner	Lookup(User,Queue)		✓

Custom Fields & Relationships							Custom Fields & Relationships Help ?
		New	Field Dependencies				
Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By	
Edit   Del	<u>Address</u>	Address__c	Text(100)			Prashanth Avverahalli Ramesha, 01/05/2017 19:43	
Edit   Del	<u>Customer ID</u>	Customer_ID__c	Auto Number			Prashanth Avverahalli Ramesha, 01/05/2017 19:39	
Edit   Del	<u>Email</u>	Email__c	Email			Prashanth Avverahalli Ramesha, 01/05/2017 19:42	
Edit   Del	<u>Last service date</u>	Last_service_date__c	Date			Prashanth Avverahalli Ramesha, 01/05/2017 19:44	
Edit   Del	<u>Phone number</u>	Phone_number__c	Phone			Prashanth Avverahalli Ramesha, 01/05/2017 19:42	
Edit   Del	<u>Vehicle name</u>	Vehicle_name__c	Text(50)			Prashanth Avverahalli Ramesha, 01/05/2017 19:41	
Edit   Del	<u>Vehicle number</u>	Vehicle_number__c	Text(10)			Prashanth Avverahalli Ramesha, 01/05/2017 19:41	
Deleted Fields (1)							

## Customer Layout



Customer Edit

New Customer

Customer Edit		Save	Save & New	Cancel
Information				
Name	<input type="text"/>	Owner	Prashanth Avverahalli Ramesha	
Vehicle_name	<input type="text"/>			
Vehicle_number	<input type="text"/>			
Phone_number	<input type="text"/>			
Email	<input type="text"/>			
Address	<input type="text"/>			
Last_service_date	<input type="text" value="03/05/2017"/>			
		Save	Save & New	Cancel

## Customer Values

New Customer		Change Owner							
Action	Name	Customer_ID	Phone_number	Address	Email	Vehicle_name	Vehicle_number	Last_service_date	
Edit   Del	Charles Carr	CUS-0052	81392693	Jennings Wood L...	charles.carr@gmail...	Highlander	05MO1844	02/12/2017	
Edit   Del	Alan Henderson	CUS-0021	86280898	32A The Green, ...	alan.henderson@g...	Estate	05MO10305	01/12/2017	
Edit   Del	Joanne James	CUS-0039	81434153	36 Breeze Hill, B...	joanne.james@qm...	Fox	05MO10394	01/12/2017	
Edit   Del	Sonia Rees	CUS-0018	85494709	24 Goodyere St, Gl...	sonia.rees@qma...	Escort	05MO1030	03/11/2017	
Edit   Del	Brandon Bailey	CUS-0023	88942698	14 Copeman Rd, ...	brandon.bailey@...	Eurovan	05MO10309	02/11/2017	
Edit   Del	Christopher McGrath	CUS-0060	82445618	11 Sawston Cl, Ip...	christopher.mcgrath...	Impulse	05MO1912	02/11/2017	
Edit   Del	Emma Skinner	CUS-0050	85304434	Charles Dickens ...	emma.skinner@qm...	Gremlin	05MO1830	01/11/2017	
Edit   Del	Elizabeth Brown	CUS-0053	85182935	24 Leigh Cl, Walsal...	elizabeth.brown@q...	Hombre	05MO1849	04/09/2017	
Edit   Del	Chloe Payne	CUS-0047	86403230	28 Earlsay, Gat...	chloe.payne@qmai...	Grand Am	05MO1814	03/09/2017	
Edit   Del	Melanie White	CUS-0063	83744164	22 Cobham Dr, W...	melanie.white@qm...	Intrepid	05MO1923	01/09/2017	
Edit   Del	Abigail Parr	CUS-0025	89426985	3 Belchers Ln, N...	abigail.parr@gmail...	Excursion	05MO10322	04/08/2017	
Edit   Del	Natalie North	CUS-0046	82217843	B7005, Newton S...	natalie.north@qma...	Gran Fury	05MO1809	02/08/2017	
Edit   Del	Lucas Duncan	CUS-0027	83434517	50 W Shore Rd, ...	lucas.duncan@qm...	Explorer	05MO10329	03/07/2017	
Edit   Del	Jack Davies	CUS-0044	87073760	Birdale Field Ln, ...	jack.davies@gmail...	Golf	05MO1803	03/07/2017	
Edit   Del	Dominic Young	CUS-0059	89231315	97 A739, Glasnow	dominic.young@qm...	Impreza	05MO1905	04/06/2017	

1-25 of 63 0 Selected << Previous Next >> Page 1 of 3

The data for the customers was created using a website which generates fictitious data. The generated data was exported to excel and brought into Salesforce app using import wizard.

## Choosing the custom object to populate the data

What kind of data are you importing?

Standard objects

Custom objects

Customers

Employees

Invoices

Services

Spares

What do you want to do?

Add new records

Match by: --None--

Which User field in your file designates record owners? --None--

Trigger workflow rules and processes? ☐ Trigger workflow rules and processes for new and updated records

Update existing records

Where is your data located?

Drag CSV file here to upload

CSV

## Mapping the fields from excel source

Choose data

Edit mapping

Start import

Map	Unmapped	Lname	Allan	Nolan	McDonald
Change	Name	Full Name	Phil Allan	Jennifer Nolan	Jane McDonald
Change	Email	Email	phil.allan@gmail.com	jennifer.nolan@gmail.com	jane.mcdonald@gmail.com
Change	Phone_number	Phone	89437919	83664180	84183442
Change	Vehicle_number	Vehicle No.	05MO10278	05MO10283	05MO10289
Change	Address	Address	100 Great Barr St, Birmingham B9 4BB, UK	North Dr, New Milton BH25, UK	40 Sutherlands Ct, Chandler's Ford, Eastleigh SO53 2QB, UK
Change	Vehicle_name	Car	Envoy	Equinox	Escalade
Change	Last_service_date	Last Service date	1/23/2017	3/29/2017	1/16/2017

## Excel file data generated by website

G19						68 Glencoyne Dr, Southport PR9 9UT, UK	
	B	C	D	E	F	G	H
1	Lname	Full Name	Email	Phone	Vehicle No.	Address	Car
2	Allan	Phil Allan	phil.allan@gmail.com	89437919	05MO10278	100 Great Barr St, Birmingham B9 4BB, UK	Envoy
3	Nolan	Jennifer Nolan	jennifer.nolan@gmail.com	83664180	05MO10283	North Dr, New Milton BH25, UK	Equinox
4	McDonald	Jane McDonald	jane.mcdonald@gmail.com	84183442	05MO10289	40 Sutherlands Ct, Chandler's Ford, Eastleigh SO53 2QB, UK	Escalade
5	Watson	Diane Watson	diane.watson@gmail.com	86202997	05MO1029	Unnamed Road, Helston TR12 6RF, UK	Escape
6	Rees	Sonia Rees	sonia.rees@gmail.com	85494709	05MO1030	24 Goodyere St, Gloucester GL1 4UG, UK	Escort
7	Butler	Paul Butler	paul.butler@gmail.com	84161621	05MO10303	39 Salop Rd, Welshpool SY21 7EA, UK	Esperante
8	Peters	Diane Peters	diane.peters@gmail.com	82537367	05MO10304	10-12 Ravens Way, Crow Lane Industrial Estate, Epsom, Surrey, UK	Esprit
9	Henderson	Alan Henderson	alan.henderson@gmail.com	86280898	05MO10305	32A The Green, Swanwick, Alfreton DE55 1AN, UK	Estate
10	Buckland	Eric Buckland	eric.buckland@gmail.com	86549079	05MO10308	Barton Rd, Malpas SY14, UK	Esteem
11	Bailey	Brandon Bailey	brandon.bailey@gmail.com	88942698	05MO10309	14 Copeman Rd, Roydon, Diss IP22 5RH, UK	Eurovan
12	Clark	Angela Clark	angela.clark@gmail.com	88208927	05MO10321	11 Latchwood Ln, Farnham GU10 3HA, UK	Excel
13	Parr	Abigail Parr	abigail.parr@gmail.com	89426985	05MO10322	3 Belchers Ln, Nazeing, Waltham Abbey EN9 2SA, UK	Excursion
14	Johnston	Robert Johnston	robert.johnston@gmail.com	82462259	05MO10326	10 Farr Cres, Helmsdale KW8 6LJ, UK	Expedition
15	Duncan	Lucas Duncan	lucas.duncan@gmail.com	83434517	05MO10329	50 W Shore Rd, Edinburgh EH5 1QH, UK	Explorer
16	Powell	Nicola Powell	nicola.powell@gmail.com	86927963	05MO10333	Unnamed Road, Callington PL17 8LX, UK	Expo
17	Brown	Madeleine Brown	madeleine.brown@gmail.com	87262322	05MO10334	1 Fine St, Peterchurch, Hereford HR2 0SN, UK	Express

## After Import

### Data Import Wizard

[Help for this page](#) ?

### Recent Import Jobs

Status	Object	Records Created	Records Updated	Records Failed	Start Date	Processing Time (ms)
Closed	Spare	29	0	0	05-02-2017 08:03	57
Closed	Customer	0	50	0	05-02-2017 07:54	135
Closed	Customer	50	0	0	05-02-2017 07:43	80


## Employee

### Fields and Relationships

Standard Fields						<a href="#">Standard Fields Help</a> ?	
Action	Field Label	Field Name	Data Type	Controlling Field	Indexed		
	<a href="#">Created By</a>	CreatedBy	Lookup(User)				
<a href="#">Edit</a>	<a href="#">Employee Name</a>	Name	Text(80)		✓		
	<a href="#">Last Modified By</a>	LastModifiedBy	Lookup(User)				
<a href="#">Edit</a>	<a href="#">Owner</a>	Owner	Lookup(User,Queue)		✓		

Custom Fields & Relationships							<a href="#">Custom Fields &amp; Relationships Help</a> ?	
		<a href="#">New</a>	<a href="#">Field Dependencies</a>					
Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By		
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Replace</a>	<a href="#">Designation</a>	Designation__c	Picklist			<a href="#">Prashanth Avverahalli Ramesha</a> , 02/05/2017 06:16		
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Emp_Address</a>	Emp_Address__c	Text Area(255)			<a href="#">Prashanth Avverahalli Ramesha</a> , 01/05/2017 19:36		
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Employee_contact</a>	Employee_contact__c	Phone			<a href="#">Prashanth Avverahalli Ramesha</a> , 01/05/2017 19:34		
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Employee_ID</a>	Employee_ID__c	Text(50)			<a href="#">Prashanth Avverahalli Ramesha</a> , 02/05/2017 01:16		

## Employee Layout

 **Employee Edit**

[New Employee](#)

[Help for this Page](#) ?

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**Employee Edit** [Save](#) [Save & New](#) [Cancel](#)

**Information** ! = Required Information

Employee Name

Employee\_ID


Designation --None-- ▼


Employee\_contact

Emp\_Address

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

## Employee Values

**EmployeeList** [Edit](#) | [Delete](#) | [Create New View](#)

[New Employee](#) [Change Owner](#) 


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

<input type="checkbox"/>	Action	Employee Name ↑	Employee_ID	Designation	Employee_contact	Emp_Address
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Blake Morrison</a>	E256	Billing	07700 900613	16 Beechcroft Rd, Chessington K...
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Connor Langdon</a>	E245	Coordinator	89234231	Gilchriston Cottages, Humble EH...
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Eric Forsyth</a>	E255	Coordinator	07700 900799	82 Spinneyfield, Rotherham S60 ...
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Jack</a>	E233	Mechanic	083358134	#65 Rosemund avenue Dublin 7
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Jan Churchill</a>	E260	Mechanic	0113 496 0843	B4519, Llangammarch Wells LD4
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">John</a>	E231	Mechanic	08932341	24 church street Dublin 10
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Josh Peck</a>	E244	Mechanic	089232143	#21 Pearl street Dublin 3
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Julian Paige</a>	E258	Coordinator	07700 900695	5 Stray Walk, Harrogate HG2 8HU
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Liam Miller</a>	E257	Billing	07700 900733	8 Connaught Rd, Bagshot GU19 ...
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Mark Butcher</a>	E230	Mechanic	08932413	#32 Rose avenue Dublin 5
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Mathew</a>	E232	Mechanic	08954621	#86 Carlos street dublin 10
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Mike</a>	E234	Mechanic	08976542	#89/1 James street Dublin 12
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Rebecca Sharp</a>	E256	Coordinator	07700 900728	51 The Crescent, Northallerton D...
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Sean Scott</a>	E245	Mechanic	089234212	#45/7 Sesame street Dublin 5
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Steve Parker</a>	E243	Mechanic	08932134	#87 west park Dublin 15


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## Spares

### Fields and Relationships

**Standard Fields** [Standard Fields Help](#) 

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
	<a href="#">Created By</a>	CreatedBy	Lookup(User)		
	<a href="#">Last Modified By</a>	LastModifiedBy	Lookup(User)		
<a href="#">Edit</a>	<a href="#">Owner</a>	Owner	Lookup(User,Queue)		<input checked="" type="checkbox"/>
<a href="#">Edit</a>	<a href="#">Product Name</a>	Name	Text(80)		<input checked="" type="checkbox"/>

**Custom Fields & Relationships** [Custom Fields & Relationships Help](#) 

[New](#) [Field Dependencies](#)

Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Product ID</a>	Spare_ID__c	Auto Number			<a href="#">Prashanth Avverahalli Ramesha</a> , 01/05/2017 19:12
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Product price</a>	Product_price__c	Currency(8, 2)			<a href="#">Prashanth Avverahalli Ramesha</a> , 02/05/2017 05:08
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Quantity</a>	Quantity__c	Number(10, 0)			<a href="#">Prashanth Avverahalli Ramesha</a> , 01/05/2017 19:15

### Spares Layout



**Spare Edit** [Save](#) [Save & New](#) [Cancel](#)

**Information**




Product\_Name


Quantity

Product\_price

Owner Prashanth Avverahalli Ramesha

## Spares Values

 **SparesList** | [Edit](#) | [Delete](#) | [Create New View](#)  

[New Spare](#) [Change Owner](#) 

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

<input type="checkbox"/>	Action	Product_Name ↑	Product_ID	Product_price	Quantity
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Air Filter</a>	P-021	€190.00	50
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Auxiliary Lamps</a>	P-022	€90.00	200
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Bosch Batteries</a>	P-006	€200.00	40
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Bosch Spark Plug</a>	P-007	€120.00	55
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Brake Pads</a>	P-018	€40.00	160
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Brakes</a>	P-010	€160.00	74
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Bridgestone Tyres</a>	P-002	€90.00	63
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Ceat Tyres</a>	P-003	€55.00	40
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Charging Coil</a>	P-016	€240.00	30
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Clutch Plates</a>	P-019	€200.00	100
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Coolant</a>	P-024	€60.00	120
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Coolant Filters</a>	P-020	€150.00	40
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Engine Oil</a>	P-023	€60.00	300
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Filter</a>	P-009	€340.00	40
<input type="checkbox"/>	<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Gear lever</a>	P-012	€80.00	40

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## Service


### Fields and Relationships

**Standard Fields** [Standard Fields Help](#) ?

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
	<a href="#">Created By</a>	CreatedBy	Lookup(User)		
	<a href="#">Last Modified By</a>	LastModifiedBy	Lookup(User)		
<a href="#">Edit</a>	<a href="#">ServiceID</a>	Name	Auto Number		✓

**Custom Fields & Relationships** [Custom Fields & Relationships Help](#) ?

[New](#) [Field Dependencies](#)

Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">CustInvoice</a>	CustInvoice__c	Master-Detail(Invoice)	✓		<a href="#">Prashanth Avverahalli Ramesha</a> , 02/05/2017 07:17
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Discount</a>	Discount__c	Percent(3, 0)			<a href="#">Prashanth Avverahalli Ramesha</a> , 02/05/2017 07:23
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Service Coordinator</a>	Service_Coordinator__c	Lookup(Employee)	✓		<a href="#">Prashanth Avverahalli Ramesha</a> , 02/05/2017 06:16
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Service cost</a>	Service_cost__c	Currency(18, 0)			<a href="#">Prashanth Avverahalli Ramesha</a> , 02/05/2017 07:12
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Replace</a>	<a href="#">Service status</a>	Service_status__c	Picklist			<a href="#">Prashanth Avverahalli Ramesha</a> , 01/05/2017 18:57
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Replace</a>	<a href="#">Service Type</a>	Service_Type__c	Picklist			<a href="#">Prashanth Avverahalli Ramesha</a> , 02/05/2017 04:57
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Spare Cost</a>	Spare_Cost__c	Formula (Currency) 			<a href="#">Prashanth Avverahalli Ramesha</a> , 02/05/2017 07:10
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Spare installed</a>	Spare_installed__c	Lookup(Spare)	✓		<a href="#">Prashanth Avverahalli Ramesha</a> , 02/05/2017 05:02
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Spare quantity</a>	Spare_quantity__c	Number(10, 0)			<a href="#">Prashanth Avverahalli Ramesha</a> , 02/05/2017 07:10
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">Total Cost</a>	Total_Cost__c	Formula (Currency)			<a href="#">Prashanth Avverahalli Ramesha</a> , 02/05/2017 07:37

### Master – Detail Relationship between Service and Invoice

**Custom Field Definition Edit** [Save](#) [Cancel](#)

**Field Information** ! = Required Information

Field Label  Data Type Master-Detail

Field Name

Description

Help Text

**Master-Detail Options**

Related To [Invoice](#) Child Relationship Name

Related List Label

Sharing Setting ☐ Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.

## Calculating the spares cost

**Custom Field Definition Detail**

EditSet Field-Level SecurityView Field Accessibility

**Field Information**

Field Label	Spare_Cost	Object Name	Service
Field Name	Spare_Cost		
API Name	Spare_Cost__c		
Description			
Help Text			
Created By	Prashanth Avverahalli Ramesha, 02/05/2017 07:07	Modified By	Prashanth Avverahalli Ramesha, 02/05/2017 07:10

**Formula Options**

Data Type	Formula
Decimal Places	2

Spare\_installed\_\_rProduct\_price\_\_c \* Spare\_quantity\_\_c

## Calculating total service cost

**Custom Field Definition Detail**

EditSet Field-Level SecurityView Field Accessibility

**Field Information**

Field Label	Total_Cost	Object Name	Service
Field Name	Total_Cost		
API Name	Total_Cost__c		
Description			
Help Text			
Created By	Prashanth Avverahalli Ramesha, 02/05/2017 07:21	Modified By	Prashanth Avverahalli Ramesha, 02/05/2017 07:37

**Formula Options**

Data Type	Formula
Decimal Places	2

(Spare\_Cost\_\_c + Service\_cost\_\_c) - (Discount\_\_c \* (Spare\_Cost\_\_c + Service\_cost\_\_c))

## Picklist values for type of service

Values						Values
Action	Values	API Name	Default	Chart Colors	Modified By	
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Completed	Completed	<input type="checkbox"/>	Assigned dynamically	Prashanth Avverahalli Ramesha, 01/05/2017 18:57	
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	In Progress	In Progress	<input type="checkbox"/>	Assigned dynamically	Prashanth Avverahalli Ramesha, 01/05/2017 18:57	
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Pending	Pending	<input type="checkbox"/>	Assigned dynamically	Prashanth Avverahalli Ramesha, 01/05/2017 18:57	
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Requires additional repair	Requires additional repair	<input type="checkbox"/>	Assigned dynamically	Prashanth Avverahalli Ramesha, 01/05/2017 18:57	

## Picklist values for status of service

Values						Values Help
Action	Values	API Name	Default	Chart Colors	Modified By	
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Completed	Completed	<input type="checkbox"/>	Assigned dynamically	Prashanth Avverahalli Ramesha, 01/05/2017 18:57	
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	In Progress	In Progress	<input type="checkbox"/>	Assigned dynamically	Prashanth Avverahalli Ramesha, 01/05/2017 18:57	
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Pending	Pending	<input type="checkbox"/>	Assigned dynamically	Prashanth Avverahalli Ramesha, 01/05/2017 18:57	
<a href="#">Edit</a>   <a href="#">Del</a>   <a href="#">Deactivate</a>	Requires additional repair	Requires additional repair	<input type="checkbox"/>	Assigned dynamically	Prashanth Avverahalli Ramesha, 01/05/2017 18:57	

Spares Layout

Service Edit

New Service

Help for this Page

Service Edit

SaveSave & NewCancel

Information

= Required Information

Service\_status

--None--

Service\_Coordinator

Service\_Type

--None--

Spare\_installed

Spare\_quantity

Service\_cost

CustInvoice

Discount

SaveSave & NewCancel

Spares Values

Service History

EditDeleteCreate New View

New Service

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

Action	ServiceID	CustInvoice	Service_Coordinator	Service_cost	Service_status	Service_Type	Spare_Cost	Spare_installed
Edit   Del	SRV-0038	INV-0031	Eric Forsyth	€300	Completed	Spare part replacem...	€720.00	Wheel Cylinder
Edit   Del	SRV-0027	INV-0020	Eric Forsyth	€50	Completed	Spare part replacem...	€60.00	Viper Blades
Edit   Del	SRV-0058	INV-0051	Eric Forsyth	€120	Completed	Spare part replacem...	€120.00	Tubes
Edit   Del	SRV-0020	INV-0013	Eric Forsyth	€250	Completed	Spare part replac...	€110.00	Suspension
Edit   Del	SRV-0019	INV-0012	Connor Langdon	€150	Completed	Spare part replac...	€240.00	Seat belts
Edit   Del	SRV-0039	INV-0032	Connor Langdon	€160	Completed	Spare part replac...	€135.00	Mirror
Edit   Del	SRV-0050	INV-0043	Eric Forsyth	€200	Completed	Spare part replacem...	€320.00	Michelin Tyres
Edit   Del	SRV-0033	INV-0026	Eric Forsyth	€160	Completed	Spare part replacem...	€80.00	Horn
Edit   Del	SRV-0014	INV-0007	Connor Langdon	€40	Completed	Spare part replacem...	€260.00	GripMax Tyres
Edit   Del	SRV-0017	INV-0010	Julian Paige	€140	In Progress	Spare part replacem...	€320.00	Gear lever
Edit   Del	SRV-0054	INV-0047	Julian Paige	€390	Completed	Spare part replacem...	€320.00	Gear lever
Edit   Del	SRV-0008	INV-0002	Connor Langdon	€180	Completed	Wash + Oil Change	€120.00	Engine Oil
Edit   Del	SRV-0015	INV-0008	Rebecca Sharp	€120	Completed	Wash + Oil Change	€60.00	Engine Oil
Edit   Del	SRV-0018	INV-0011	Eric Forsyth	€120	Completed	Wash + Oil Change	€60.00	Engine Oil
Edit   Del	SRV-0023	INV-0016	Rebecca Sharp	€120	Completed	Wash + Oil Change	€60.00	Engine Oil

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Invoice

Fields and Relationships

Standard Fields

Standard Fields Help

Action	Field Label	Field Name	Data Type	Controlling Field	Indexed
	Created By	CreatedBy	Lookup(User)		
Edit	InvoiceID	Name	Auto Number		✓
	Last Modified By	LastModifiedBy	Lookup(User)		

Custom Fields & Relationships

NewField Dependencies

Custom Fields & Relationships Help

Action	Field Label	API Name	Data Type	Indexed	Controlling Field	Modified By
Edit   Del	Customer	Customer__c	Master-Detail(Customer)	✓		Prashanth Avverahalli Ramesha, 02/05/2017 01:13
Edit   Del	Next service date	Ne__c	Formula (Date)			Prashanth Avverahalli Ramesha, 01/05/2017 20:01
Edit   Del   Replace	Payment Status	Payment_Status__c	Picklist			Prashanth Avverahalli Ramesha, 01/05/2017 19:51
Edit   Del	Service Date	Service_Date__c	Date			Prashanth Avverahalli Ramesha, 01/05/2017 20:00
Edit   Del	Vehicle	Vehicle__c	Formula (Text)			Prashanth Avverahalli Ramesha, 02/05/2017 07:57
Edit   Del	Vehicle number	Vehicle_number__c	Formula (Text)			Prashanth Avverahalli Ramesha, 02/05/2017 08:09



## Master-Detail Relationship between Customer and Invoice

**Custom Field Definition Edit**

Change Field TypeSaveCancel

**Field Information**

= Required Information

Field LabelCustomer

Field NameCustomer

DescriptionPull the customer name into the invoice

Help Text

Data TypeMaster-Detail

**Master-Detail Options**

Related ToCustomer

Child Relationship NameInvoices

Related List LabelInvoices

Sharing Setting

Select the minimum access level required on the Master record to create, edit, or delete related Detail records:  
☐ Read Only: Allows users with at least Read access to the Master record to create, edit, or delete related Detail records.  
☒ Read/Write: Allows users with at least Read/Write access to the Master record to create, edit, or delete related Detail records.

Allow reparenting☐ Child records can be reparented to other parent records after they are created

## Calculating the next service date

**Custom Field Definition Detail**

EditSet Field-Level SecurityView Field Accessibility

**Field Information**

Field LabelNext\_service\_date

Field NameNe

API NameNe\_\_c

Description

Help Text

Object NameInvoice

Created ByPrashanth Avverahalli Ramesha, 01/05/2017 20:01

Modified ByPrashanth Avverahalli Ramesha, 01/05/2017 20:01

**Formula Options**

Data TypeFormula

Service\_Date\_\_c +90

## Pulling the vehicle name and number from the customer object using formula

**Custom Field Definition Detail**

EditSet Field-Level SecurityView Field Accessibility

**Field Information**

Field LabelVehicle

Field NameVehicle

API NameVehicle\_\_c

Description

Help Text

Object NameInvoice

Created ByPrashanth Avverahalli Ramesha, 02/05/2017 07:57

Modified ByPrashanth Avverahalli Ramesha, 02/05/2017 07:57

**Formula Options**

Data TypeFormula

Customer\_\_r.Vehicle\_name\_\_c

**Custom Field Definition Detail**

EditSet Field-Level SecurityView Field Accessibility

**Field Information**

Field LabelVehicle\_number

Field NameVehicle\_number

API NameVehicle\_number\_\_c

Description

Help Text

Object NameInvoice

Created ByPrashanth Avverahalli Ramesha, 02/05/2017 07:56


Modified ByPrashanth Avverahalli Ramesha, 02/05/2017 08:09

**Formula Options**

Data TypeFormula

Customer\_\_r.Vehicle\_number\_\_c

## Invoice Layout

 Invoice Edit  
New Invoice

Help for this Page ?

Invoice Edit

Save Save & New Cancel

Information

Customer


Payment\_Status

Service Date

--None--

[ 03/05/2017 ]

## Invoice Values

 Invoice History Edit Delete Create New View

Print ?


New Invoice

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

Action	InvoiceID ↑	Customer	Payment_Status	Service Date	Next_service_date	Vehicle	Vehicle_number
Edit   Del	INV-0002	Jack Ogden	Paid by Cash	07/04/2017	06/07/2017	Honda Ikon	05MN3069
Edit   Del	INV-0003	Sonia Rees	Pending	07/04/2017	06/07/2017	Escort	05MO1030
Edit   Del	INV-0004	Dominic Anderson	Paid by Card	03/05/2017	01/08/2017	Pontiac	05MN3091
Edit   Del	INV-0005	Edward Langdon	Pending	15/05/2017	13/08/2017	Hyundai i20	05MN3043
Edit   Del	INV-0006	Gavin Graham	Paid by Cash	01/05/2017	30/07/2017	Hyundai Tucson	05MN3077
Edit   Del	INV-0007	Rose Paige	Paid by Card	18/04/2017	17/07/2017	Horizon	05MO1850
Edit   Del	INV-0008	Gordon Powell	Paid by Cash	04/05/2017	02/08/2017	Festiva	05MO10355
Edit   Del	INV-0009	Phil Allan	Paid by Cash	08/04/2017	07/07/2017	Envoy	05MO10278
Edit   Del	INV-0010	Theresa Metcalfe	Pending	30/04/2017	29/07/2017	Range Rover	05MN3083
Edit   Del	INV-0011	Max Lawrence	Paid by Card	27/04/2017	26/07/2017	Honda Sx4	05MN308
Edit   Del	INV-0012	Ella Burgess	Paid by Cash	04/04/2017	03/07/2017	Frontier	05MO10400
Edit   Del	INV-0013	Brandon Bailey	Paid by Card	14/04/2017	13/07/2017	Eurovan	05MO10309
Edit   Del	INV-0014	Felicity Dowd	Paid by Card	19/04/2017	18/07/2017	Hummer	05MO1856
Edit   Del	INV-0015	Jacob Payne	Pending	29/04/2017	28/07/2017	Integra	05MO1920
Edit   Del	INV-0016	Cameron Jones	Paid by Card	17/04/2017	16/07/2017	Porsche Carrera	05MN3052

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Once the objects have been created and populated, the app home window will look like below:

 Search... Search

Prashanth Avvera... Setup Help Automobile Service Center

Home Reports Dashboards Spares Customers Services Employees Invoices

Quick Find / Search... Expand All Collapse All

Lightning Experience

Salesforce1 Quick Start

Force.com Home

Administer

Manage Users

Manage Apps

Manage Territories

Company Profile

Security Controls

Domain Management

Communication Templates

Translation Workbench

Data Management

Mobile Administration

Desktop Administration

Lightning for Outlook

Getting Started

Dismiss

Build App

Generate a basic app with just one step, and then easily extend that app with clicks or code.

Add App

Learn More

Next Steps

Force.com Workbook

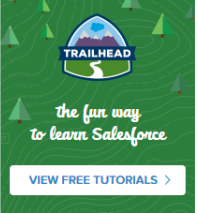
Force.com Fundamentals

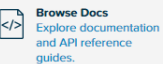
Download SalesforceA, the mobile app for admins: iOS | Android

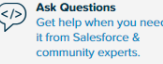
Recent Items

beta

Name	Type	Object
Vehicle_number	Custom Field Definition	Invoice
Vehicle	Custom Field Definition	Invoice
Next_service_date	Custom Field Definition	Invoice
Invoice	Custom Object Definition	
Service_status	Custom Field Definition	Service
Total_Cost	Custom Field Definition	Service
Spare_Cost	Custom Field Definition	Service
Service	Custom Object Definition	
CustInvoice	Custom Field Definition	Service

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## Workflow Actions

I have defined 3 workflow actions which triggers automatic emails to customers at 3 different phases-

1. Once the service status is set to completed, an email is triggered notifying the user that his/her vehicle has been serviced.

**Edit Rule** ! = Required Information

ObjectService

Rule NameService Completed for vehicl

DescriptionTriggers an email to customer once the service status is set to completed

**Evaluation Criteria**

Evaluate the rule when a record is:

☐ created

☐ created, and every time it's edited

☒ created, and any time it's edited to subsequently meet criteria i

How do I choose?

**Rule Criteria**

Run this rule if the following criteria are met :

Field

Service: Service\_status

--None--

--None--

--None--

--None--

Operator

equals

--None--

--None--

--None--

--None--

Value

Completed

AND

AND

AND

AND

[Add Filter Logic...](#)

Save

Cancel

## Email Template

**Email Template Detail**

Edit

Delete

Clone

Folder

Unfiled Public Email Templates

Email Template Name

Service Completed

Available For Use

✓

Template Unique Name

Service\_Completed

Last Used Date

Encoding

General US & Western Europe (ISO-8859-1, ISO-LATIN-1)

Times Used

Author

Prashanth Avverahalli Ramesha [\[Change\]](#)

Description

Created By

Prashanth Avverahalli Ramesha 03/05/2017 14:47

Modified By

Prashanth Avverahalli Ramesha 03/05/2017 14:47

Edit

Delete

Clone

**Email Template**

Send Test and Verify Merge Fields

Subject

Vehicle service completed

Plain Text Preview

Hello {Customer\_\_c.Name},

Your vehicle - {Customer\_\_c.Vehicle\_name\_\_c} has been serviced and is available for pick up.

Regards,

Auto Service Team

## 2. Another Email is triggered the day after the service to take the customer feedback.

**Email Template Detail** Edit Delete Clone

Folder	Unfiled Public Email Templates		
Email Template Name	Feedback from customer	Available For Use	<input checked="" type="checkbox"/>
Template Unique Name	Feedback_from_customer	Last Used Date	
Encoding	General US & Western Europe (ISO-8859-1, ISO-LATIN-1)	Times Used	
Author	<a href="#">Prashanth Avverahalli Ramesha</a> <span>[Change]</span>		
Description			
Created By	<a href="#">Prashanth Avverahalli Ramesha</a> , 03/05/2017 15:10	Modified By	<a href="#">Prashanth Avverahalli Ramesha</a> , 03/05/2017 15:10

Edit Delete Clone

**Email Template** Send Test and Verify Merge Fields

**Subject** | About the recent service done

**Plain Text Preview**

Hello {Customer\_\_c.Vehicle\_name\_\_c},  
  
We would like to know your feedback regarding the recent service done on your vehicle {Customer\_\_c.Vehicle\_name\_\_c}. Your feedback helps us to serve you better!.  
  
Regards,  
Auto Service Team

## Workflow action

**Rule Criteria** | Service: Service\_status EQUALS Completed

**Evaluation Criteria** | Evaluate the rule when a record is created, and any time its edited to subsequently meet criteria

**Immediate Workflow Actions**

No workflow actions have been added.

Add Workflow Action

**Time-Dependent Workflow Actions** [See an example](#)

🕒 1 Day After Rule Trigger Date Edit Delete

Action	Type	Description
<span>Edit</span> <span>Remove</span>	Email Alert	<a href="#">Customer Feedback after every service</a>

Add Workflow Action

## Sample Email

**Prashanth Avverahalli Ramesha** via [3nrxf1xr9t0uy3.0y-1cv3buaq.eu11.bnc.salesforce.com](#) 4:14 PM (0 minutes ago) ☆ ↶ ▼

to me ▼

This may be a spoofed message. Gmail couldn't verify that it was actually sent from your account. [Learn more](#)

Hello Max    Lawrence,

We would like to know your feedback regarding the recent service done on your vehicle Honda Sx4. Your feedback helps us to serve you better!.

Regards,  
Auto Service Team

3. An Email is triggered when the next service day approaches, the email is triggered on the previous day of actual next service date as a reminder.

## Workflow Action

Workflow Rule

### Service Required

[Help for this Page](#)

[« Back to List: Email Templates](#)

#### Workflow Rule Detail

[Edit](#) [Clone](#) [Deactivate](#)

Rule Name	Service Required	Object	Customer
Active	✓	Evaluation Criteria	Evaluate the rule when a record is created, and any time it's edited to subsequently meet criteria
Description			
Rule Criteria	Last_service_date__c + 90 = TODAY() - 1		
Created By	Prashanth Avverahalli Ramesha, 02/05/2017 21:19	Modified By	Prashanth Avverahalli Ramesha, 02/05/2017 21:33

#### Workflow Actions

[Edit](#)

##### Immediate Workflow Actions

No workflow actions have been added.

##### Time-Dependent Workflow Actions

[See an example](#)

🕒 1 Day Before Rule Trigger Date	
Type	Description
Email Alert	<a href="#">Next Service</a>

## Email Template

Text Email Template

### Service Required

[Help for this Page](#)

[« Back to List: Email Templates](#)

Preview your email template below.

#### Email Template Detail

[Edit](#) [Delete](#) [Clone](#)

Folder	Unfiled Public Email Templates	Available For Use	✓
Email Template Name	Service Required	Last Used Date	
Template Unique Name	Service_Required_1	Times Used	
Encoding	General US & Western Europe (ISO-8859-1, ISO-LATIN-1)		
Author	<a href="#">Prashanth Avverahalli Ramesha</a> <a href="#">[Change]</a>		
Description	Reminder		
Created By	Prashanth Avverahalli Ramesha, 02/05/2017 20:47	Modified By	Prashanth Avverahalli Ramesha, 03/05/2017 15:30

[Edit](#) [Delete](#) [Clone](#)

#### Email Template

[Send Test and Verify Merge Fields](#)

**Subject** Upcoming Service

##### Plain Text Preview

Greetings {!Customer\_\_c.Name}!,

Your vehicle needs to be service tomorrow. This is a gentle reminder.

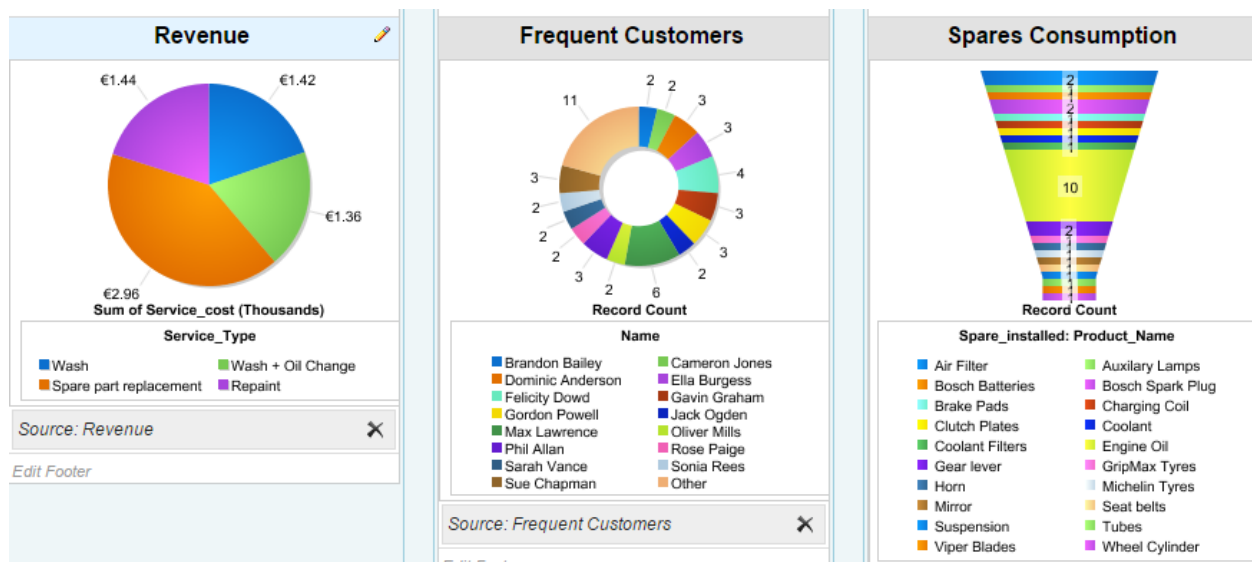
Regards,  
Auto Service Team

## Reports and Dashboards

The following report summary shows the history of services done along with their details

Name	InvoiceID	ServiceID	Service Date	Service_Type	Service_status	Service_cost
Service_Coordinator: Employee Name: <u>Connor Langdon</u> (15 records)						
<u>Jack Ogden</u>	<u>INV-0002</u>	<u>SRV-0008</u>	07/04/2017	Wash + Oil Change	Completed	€180
<u>Rose Paige</u>	<u>INV-0007</u>	<u>SRV-0014</u>	18/04/2017	Spare part replacement	Completed	€40
<u>Sue Chapman</u>	<u>INV-0024</u>	<u>SRV-0031</u>	16/02/2017	Wash + Oil Change	Completed	€120
<u>Sam Knox</u>	<u>INV-0034</u>	<u>SRV-0041</u>	23/01/2017	Spare part replacement	Completed	€40
<u>Isaac Miller</u>	<u>INV-0033</u>	<u>SRV-0040</u>	17/01/2017	Spare part replacement	Completed	€180
<u>Dominic Anderson</u>	<u>INV-0041</u>	<u>SRV-0048</u>	13/02/2017	Wash	Completed	€100
<u>Cameron Jones</u>	<u>INV-0044</u>	<u>SRV-0051</u>	11/03/2017	Wash	Completed	€120
<u>Lucas Duncan</u>	<u>INV-0018</u>	<u>SRV-0025</u>	17/03/2017	Spare part replacement	Completed	€130
<u>Paul Hunter</u>	<u>INV-0032</u>	<u>SRV-0039</u>	20/01/2017	Spare part replacement	Completed	€160
<u>Gordon Powell</u>	<u>INV-0050</u>	<u>SRV-0057</u>	08/03/2017	Repaint	Completed	€200
<u>Ella Burgess</u>	<u>INV-0012</u>	<u>SRV-0019</u>	04/04/2017	Spare part replacement	Completed	€150
<u>Cameron Bond</u>	<u>INV-0028</u>	<u>SRV-0035</u>	03/03/2017	Repaint	Completed	€120
<u>Gavin Graham</u>	<u>INV-0006</u>	<u>SRV-0013</u>	01/05/2017	Wash	Completed	€200
<u>Madeleine Brown</u>	<u>INV-0019</u>	<u>SRV-0026</u>	16/03/2017	Spare part replacement	Completed	€70
<u>Rose Paige</u>	<u>INV-0042</u>	<u>SRV-0049</u>	06/02/2017	Wash	Completed	€100
Service_Coordinator: Employee Name: <u>Eric Forsyth</u> (23 records)						
<u>Brandon Bailey</u>	<u>INV-0013</u>	<u>SRV-0020</u>	14/04/2017	Spare part replacement	Completed	€250
<u>Felicity Dowd</u>	<u>INV-0014</u>	<u>SRV-0021</u>	19/04/2017	Spare part replacement	Completed	€80
<u>Sonia Rees</u>	<u>INV-0003</u>	<u>SRV-0009</u>	07/04/2017	Repaint	In Progress	€200
<u>Ella Burgess</u>	<u>INV-0030</u>	<u>SRV-0037</u>	09/01/2017	Wash + Oil Change	Completed	€100
<u>Max Lawrence</u>	<u>INV-0011</u>	<u>SRV-0018</u>	27/04/2017	Wash + Oil Change	Completed	€120
<u>Oliver Mills</u>	<u>INV-0022</u>	<u>SRV-0029</u>	04/03/2017	Wash + Oil Change	Completed	€120

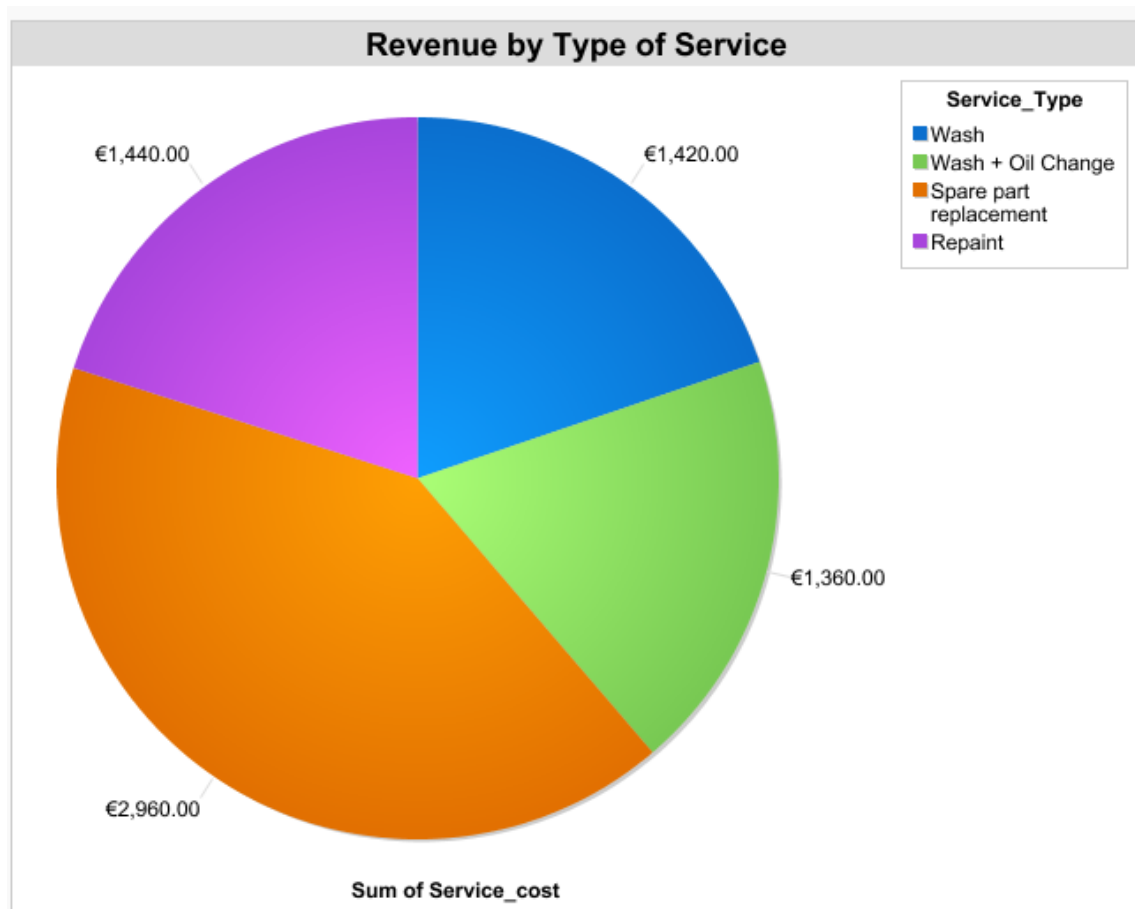
## Dashboard



The description of individual graphs is discussed in the form of business case reports

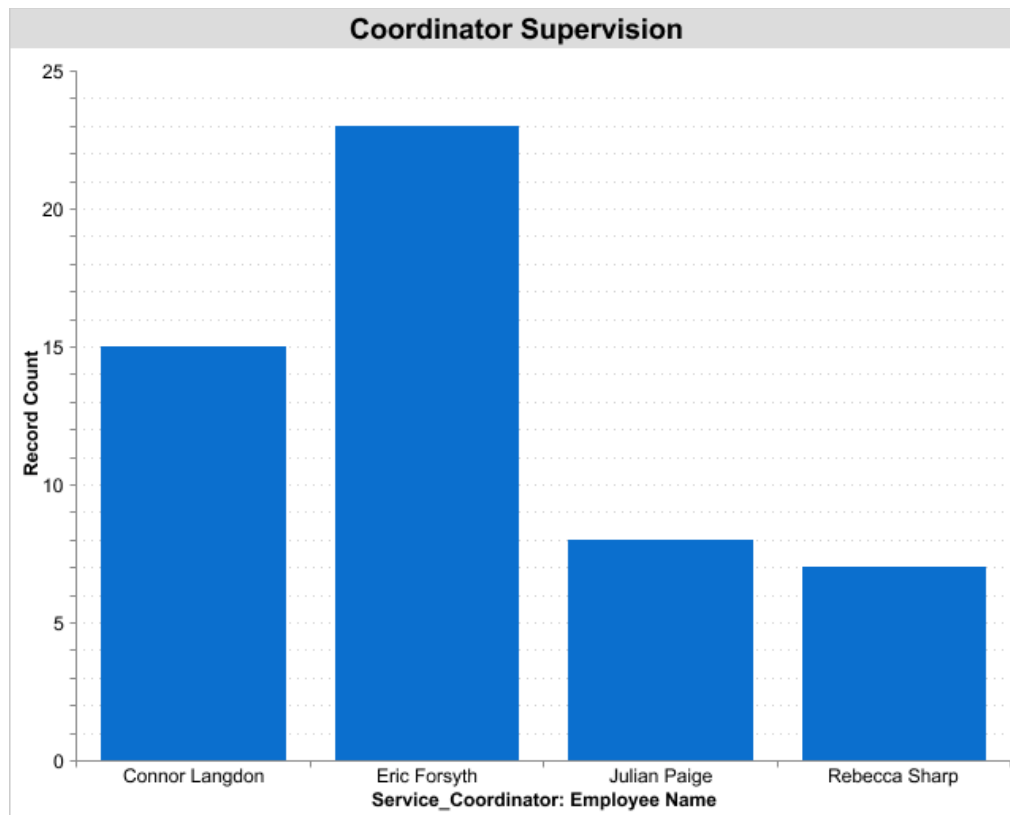
## Business Case Reports

### Distribution of revenue based on service type



Above pie chart indicates the revenue made by different service types, by looking at the chart we can make out that spare parts replacement type service has brought in more revenue to the service center, by using this chart, the service center can focus more on the import of spares.

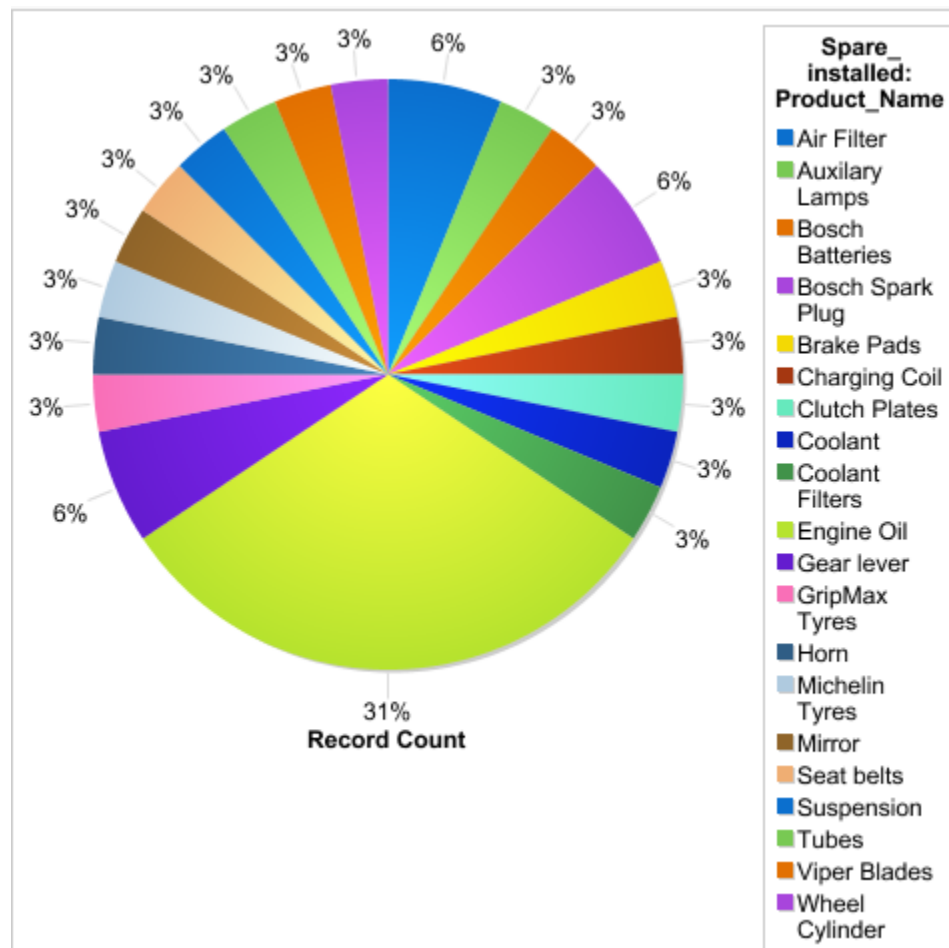
## Employee Performance



The above bar graph shows the no. of services supervised by the employees. It is evident that Eric Forsyth has supervised most services. By using this metric, companies can monitor the employee performance and provide incentives to best performing employees.

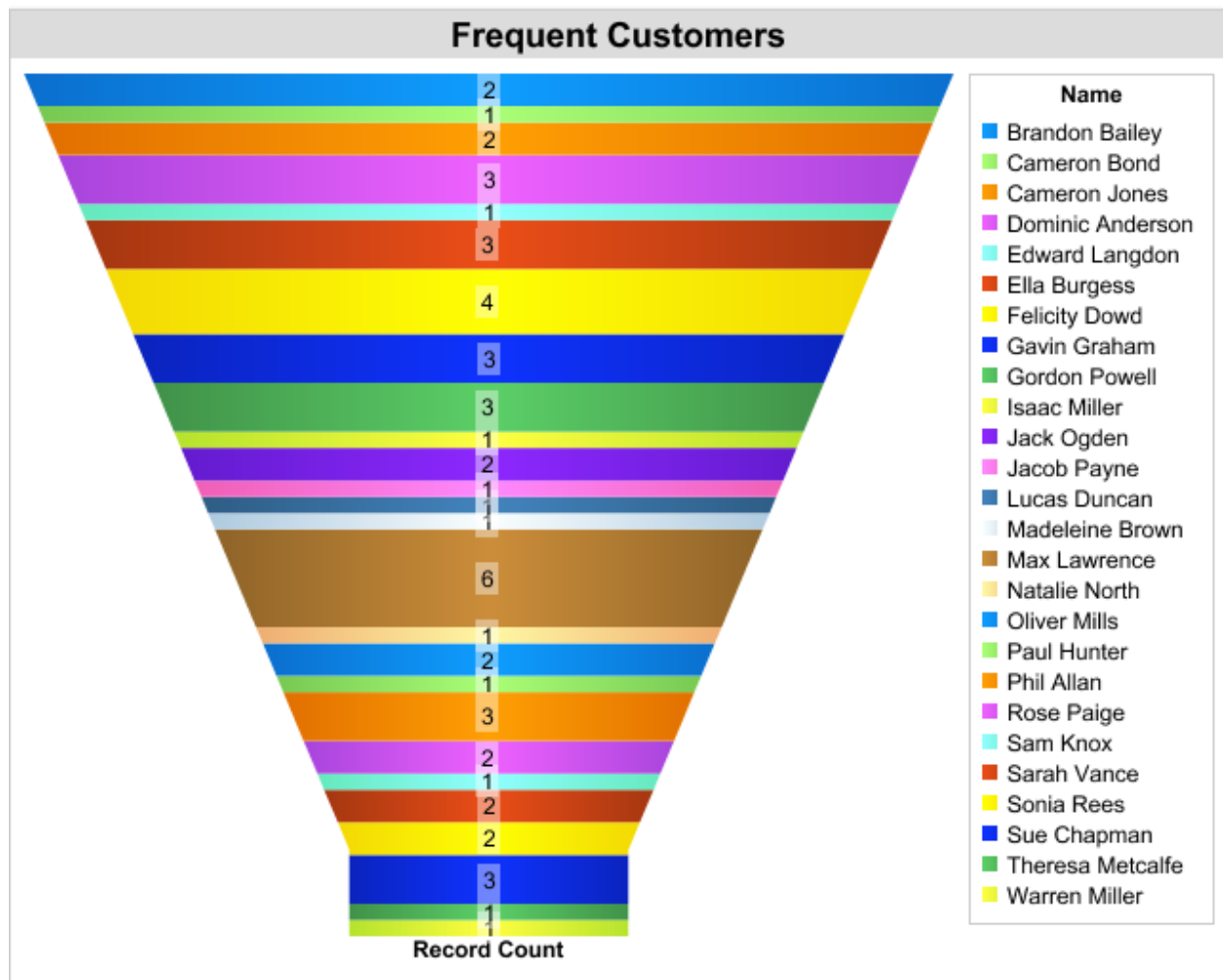


## Spare Parts Consumption



Above chart shows the utilization of spares for the service with Engine oil as the most frequently used spare. It becomes easier to keep track of the available parts in the warehouse by analyzing the spare consumption and import the spares only if there is a shortage to avoid unnecessary piling up of spare parts.

## Frequent Customers



Above chart shows the customers and number of times they have serviced their vehicles. Identifying such customers and providing them additional benefits will not only attract new customers but also retain the existing customers for longer period.

## **Conclusion**

The prime purpose of this application is to increase the business value of an automobile service center by integrating the customers into the process. Customer satisfaction is a primary aspect of a business organization. The workflow rules created in this application saves the burden of the service center by sending automated emails to the customers after the completion of a service, takes feedback from them, reminds them of impending service. The application also evaluates the performance of the employees based on their frequency of involvement in the service, additional functionalities can be added to define performance metrics to monitor them.

Management of spares also becomes easier by having all the required details in the form of records and a report can be fetched anytime to show their usage.

All these factors enable efficient operation of the service center and eventually increases their profit.