

Garage-Management-System

1. Project Overview :

This project is focused on developing a **Garage Management System**, designed to address the primary challenges of manual operations, inefficient resource utilization, and fragmented customer interactions in automotive service centers. The goal is to deliver a comprehensive solution by leveraging modern **software technologies** and an intuitive **user-centric design approach**.

Through this project, we aim to enhance **operational efficiency**, **customer experience**, and **data accuracy** while supporting the long-term goals of **automotive garages and service centers** to streamline their operations, improve service delivery, and achieve sustainable growth.

2. Objectives :

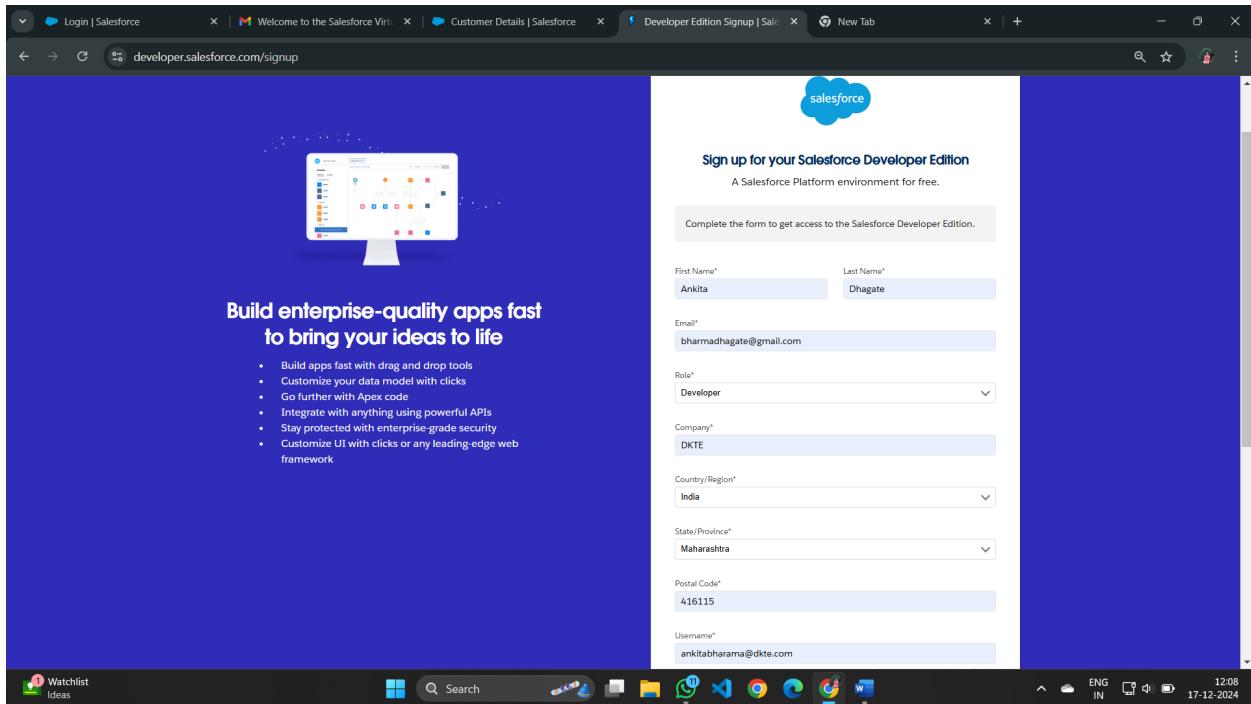
- **Business Goals:**
 - **Enhance Operational Efficiency:** Reduce manual effort by automating scheduling, inventory management, and billing processes.
 - **Improve Customer Experience:** Provide a seamless, transparent, and user-friendly service experience.
 - **Increase Profitability:** Minimize resource wastage, optimize workflows, and attract more customers through improved service quality.
 - **Support Business Growth:** Develop a scalable platform that can adapt to the growing needs of garages and service centers.
- **Specific Outcomes:**
 - **Appointment Scheduling Module:** An online system for booking, rescheduling, and managing service appointments efficiently.
 - **Inventory Management System:** A tool to track stock levels, send alerts for low inventory, and generate purchase orders.
 - **Billing and Payment Gateway Integration:** Automated invoicing and multiple payment options for customers.
 - **Customer Database and History:** A CRM module to store customer profiles, vehicle details, and service history for personalized service.
 - **Performance and Analytics Dashboard:** Generate detailed reports on key metrics such as service completion rates, revenue trends, and customer feedback.
 - **Resource Allocation System:** Assign jobs to mechanics based on their expertise and availability, ensuring effective utilization of manpower.

3. Salesforce Key Features and Concepts Utilized :

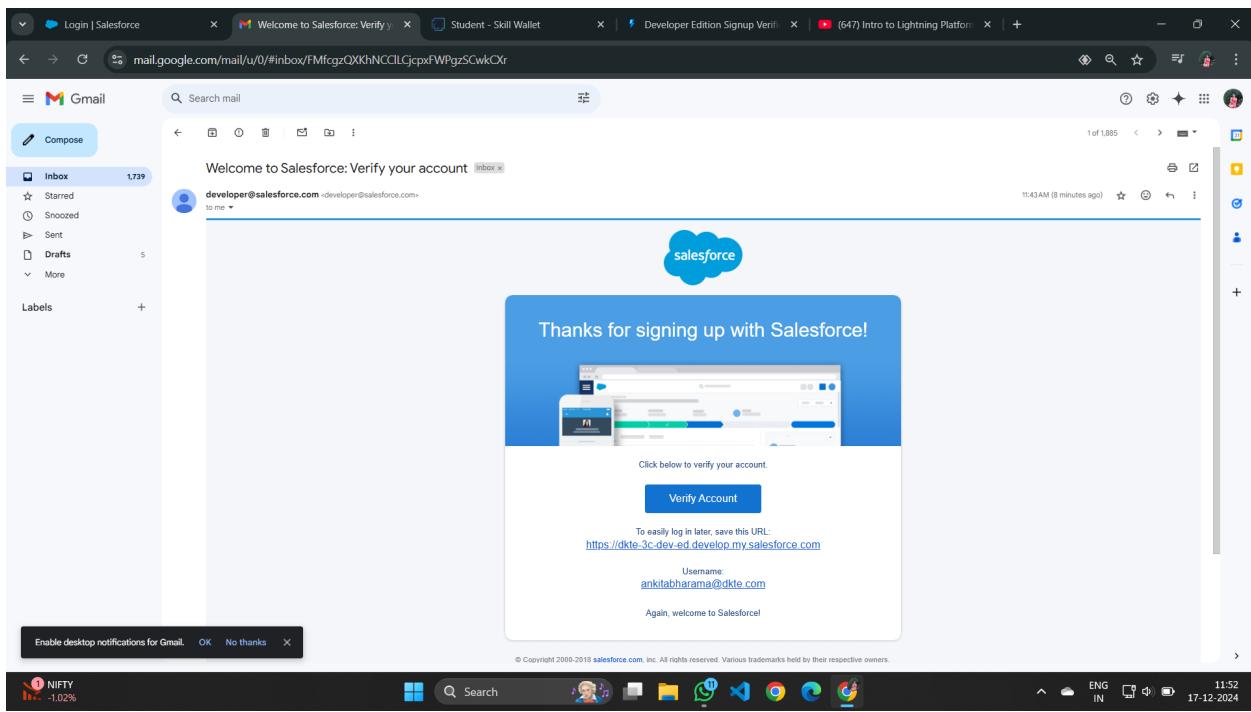
- **Customer Relationship Management (CRM):**
Utilize Salesforce's CRM capabilities to store and manage customer information, including service history, contact details, and preferences, enabling personalized interactions and improved customer retention.
- **Appointment Scheduling:**
Leverage Salesforce's scheduling tools to allow customers to book, modify, and track their service appointments seamlessly.
- **Service Workflow Automation:**
Automate task assignments, track service progress, and notify customers about updates using Salesforce automation features.
- **Inventory Management:**
Implement tools to monitor spare parts inventory, manage stock levels, and generate alerts for reordering critical items.
- **Billing and Invoicing:**
Integrate invoicing features within Salesforce to streamline the billing process, ensuring accurate and transparent payment transactions.
- **Analytics and Reporting:**
Use Salesforce's reporting and dashboard features to generate insights into garage operations, customer satisfaction, and financial performance.
- **Mobile Accessibility:**
Ensure mobile-friendly access to the system for both customers and garage employees, enabling real-time updates and service management on the go.
- **Scalability and Integration:**
Design the system to integrate seamlessly with existing tools and support scalability as the business grows, ensuring long-term adaptability.

4. Detailed Steps to Solution Design :

1.Creating Developer account



2. Account Activation



The screenshot shows two tabs open in a web browser:

- Change Your Password**: A modal window titled "Change Your Password" asking for a new password for the user "ankitabharma@dkite.com". It includes fields for "New Password" and "Confirm New Password", a security question dropdown ("In what city were you born?"), and an answer input field containing "Ichalkaranji". A note at the bottom states "Password was last changed on 17/12/2024, 11:41 am."
- Setup Home**: The main Salesforce Lightning interface. It features a sidebar with links like "Service Setup Assistant", "Commerce Setup Assistant", and "Real-time Collaborative Docs". The main content area displays three cards: "Get Started with Einstein Bots", "Mobile Publisher", and "Real-time Collaborative Docs". Below these cards is a section titled "Most Recently Used" showing a single item: "Ankita Dhagate" (User).

3. Create Customer Details Object

The screenshot shows the Salesforce Setup interface under the Object Manager section. On the left, a sidebar lists various configuration options like Fields & Relationships, Page Layouts, and Record Types. The main 'Details' tab is selected, showing the object's API name as 'Customer_Details__c'. The right panel displays several settings: 'Enable Reports' (checked), 'Track Activities' (unchecked), 'Track Field History' (checked), 'Deployment Status' set to 'Deployed', and 'Help Settings' pointing to 'Standard salesforce.com Help Window'. At the bottom right of the main area are 'Edit' and 'Delete' buttons.

4. Create Appointment Object

This screenshot shows the same setup process for creating an 'Appointment' object. The API name is set to 'Appointment__c'. The right panel includes the same set of configuration items as the 'Customer Details' object, such as 'Enable Reports' (checked), 'Track Activities' (unchecked), and 'Deployment Status' set to 'Deployed'. The system status bar at the bottom indicates it's 12:05 PM on 17-12-2024, with a stock market tick for NIFTY at -1.11%.

5. Create Service records Object

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for 'Setup', 'Home', and 'Object Manager'. The main title is 'Service records' under 'SETUP > OBJECT MANAGER'. On the left, a sidebar lists various configuration options like 'Fields & Relationships', 'Page Layouts', and 'Record Types'. The main 'Details' section shows the following configuration:

Details	
Description	
API Name	Service_records__c
Custom	✓
Singular Label	Service records
Plural Label	Service records
Enable Reports	✓
Track Activities	
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

At the bottom right of the main area are 'Edit' and 'Delete' buttons. The system status bar at the bottom shows weather (24°C, Sunny), system icons, and the date/time (17-12-2024).

6. Create Billing details and feedback Object

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes tabs for 'Setup', 'Home', and 'Object Manager'. The main title is 'Billing details and feedback' under 'SETUP > OBJECT MANAGER'. On the left, a sidebar lists various configuration options like 'Fields & Relationships', 'Page Layouts', and 'Record Types'. The main 'Details' section shows the following configuration:

Details	
Description	
API Name	Billing_details_and_feedback__c
Custom	✓
Singular Label	Billing details and feedback
Plural Label	Billing details and feedback
Enable Reports	✓
Track Activities	
Track Field History	✓
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

At the bottom right of the main area are 'Edit' and 'Delete' buttons. The system status bar at the bottom shows weather (RELIANCE -1.52%), system icons, and the date/time (12:31, 17-12-2024).

7. Creating a Custom Tab

9. Create a Lightning App

App Name	Developer Name	Description	Last Modified	Type	Status
1 All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	17/12/2024, 11:14 am	Classic	
2 Analytics Studio	Insights	Automate business processes and repetitive tasks.	17/12/2024, 11:14 am	Classic	
3 App Launcher	AppLauncher	Discover and manage business solutions designed for your industry.	17/12/2024, 11:14 am	Lightning	
4 Automation	FlowsApp	Create and maintain business rules that perform complex lookups a...	17/12/2024, 11:14 am	Lightning	
5 Bolt Solutions	LightningBolt	Manage content and media for all of your sites.	17/12/2024, 11:14 am	Lightning	
6 Business Rules Engine	ExpressionSetConsole	Track sales and marketing activity with CRM objects.	17/12/2024, 11:14 am	Lightning	
7 Community	Community	Salesforce CRM Communities	17/12/2024, 11:14 am	Classic	
8 Content	Content	Salesforce CRM Content	17/12/2024, 11:14 am	Lightning	
9 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recip...	17/12/2024, 11:14 am	Lightning	
10 Digital Experiences	SalesforceCMS	Manage digital experiences for your organization.	17/12/2024, 11:14 am	Lightning	
11 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	17/12/2024, 11:14 am	Lightning	

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

*App Name: Garage Management Application
*Developer Name: Garage_Management_Application

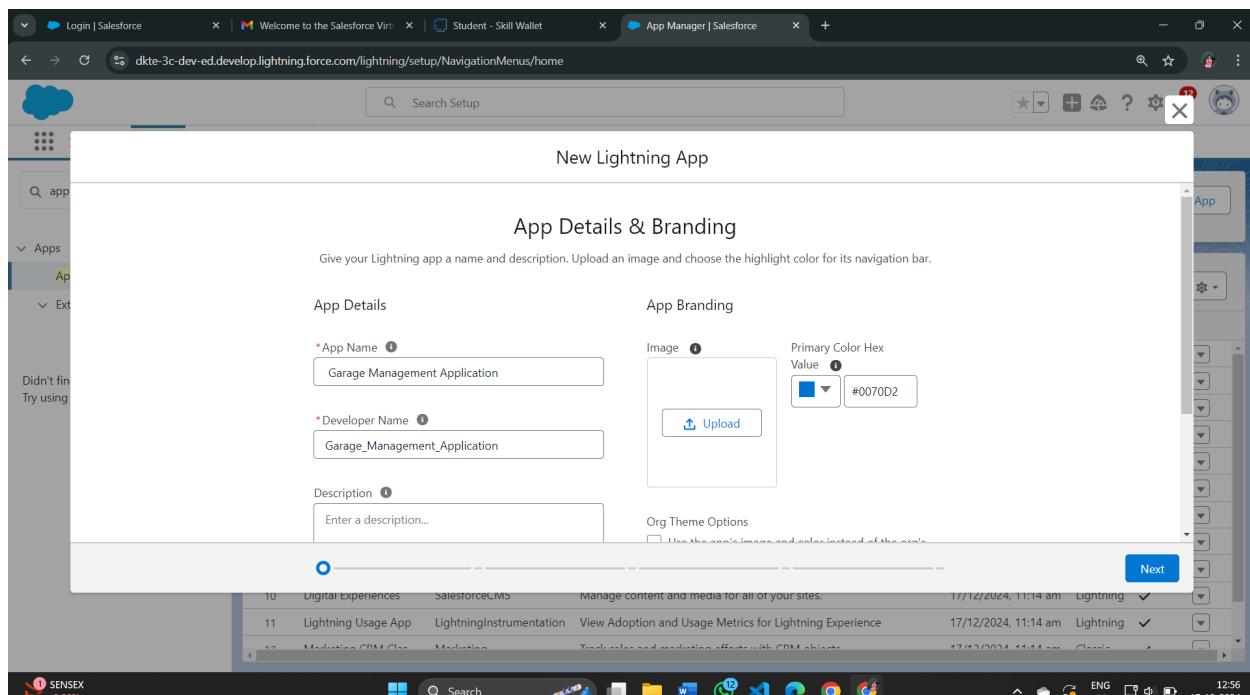
Description: Enter a description...

App Branding

Image: Upload
Primary Color Hex Value: #0070D2

Org Theme Options: Use the org's theme and colors instead of the app's

Next



New Lightning App

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

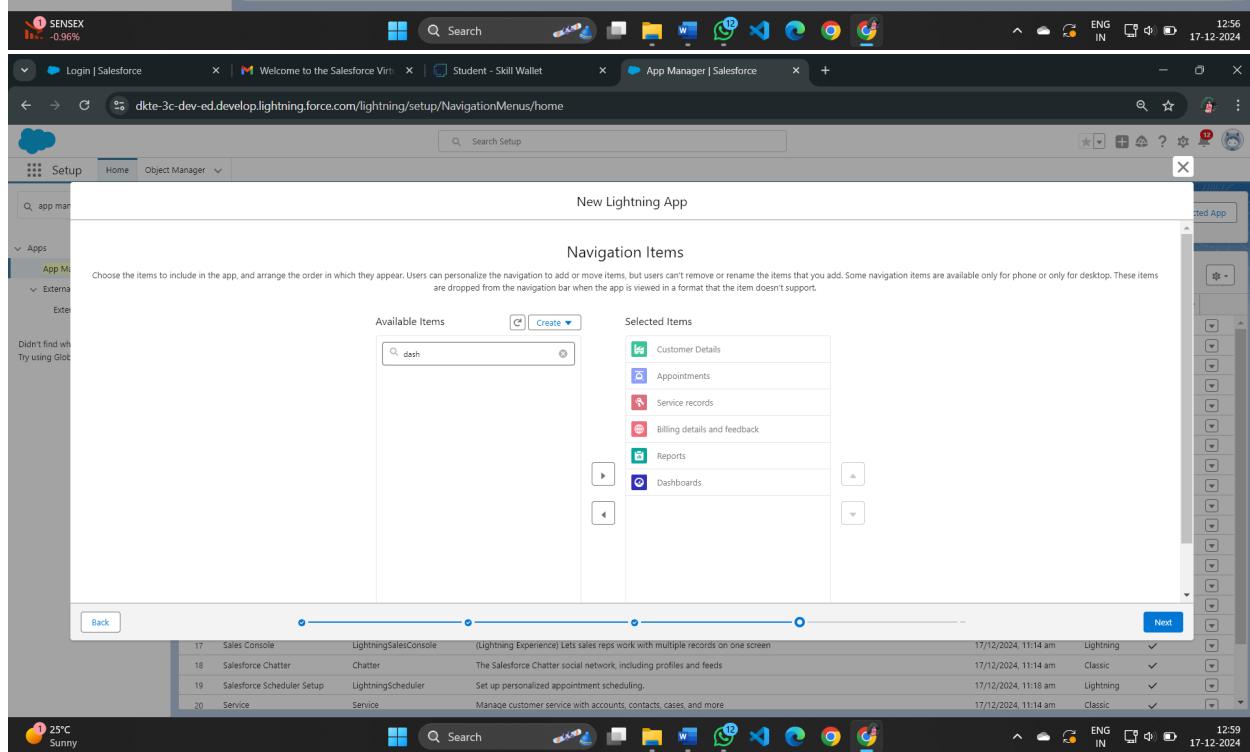
Available Items

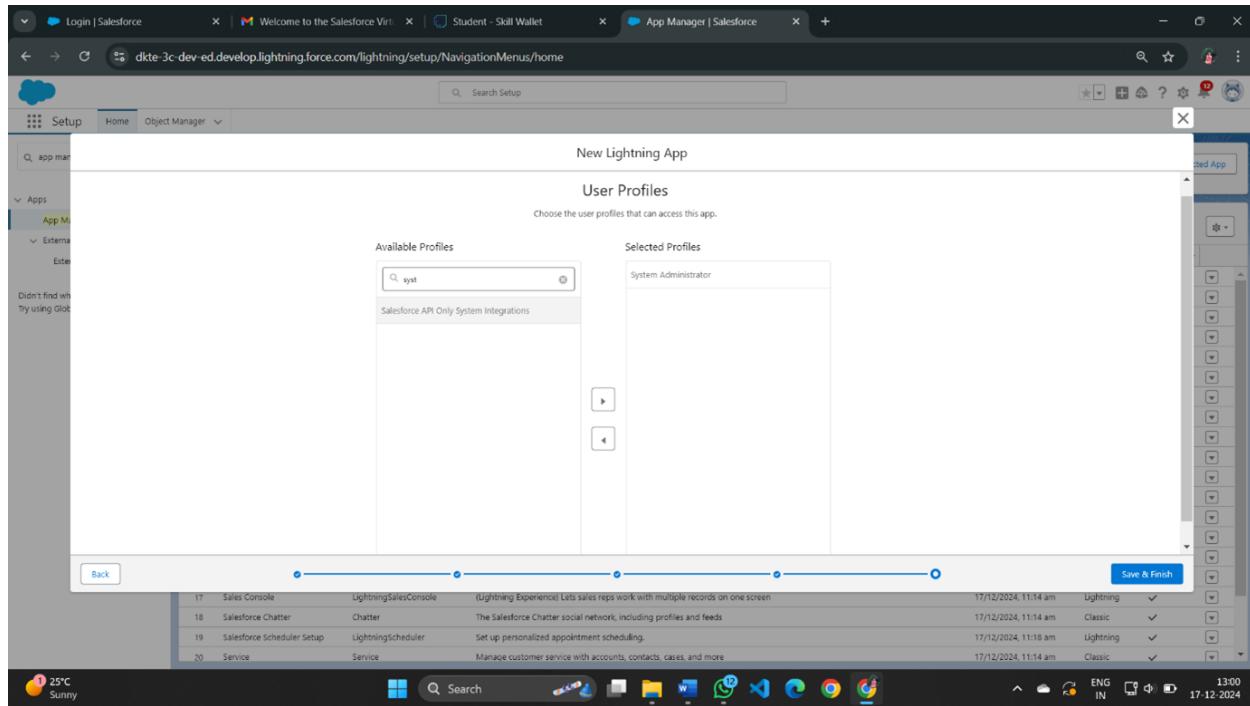
Customer Details
Appointments
Service records
Billing details and feedback
Reports
Dashboards

Selected Items

Customer Details
Appointments
Service records
Billing details and feedback
Reports
Dashboards

Back Next





10. Creation of fields for the Customer Details object

Customer Details

Customer Details Custom Field

Gmail

Back to Customer Details

Help for this Page

Custom Field Definition Detail

Field Information

Field Label	Gmail	Object Name	Customer Details
Field Name	Gmail	Data type	Email
API Name	Gmail_c		
Description	Help Text		
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Created By: Ankita.Dhangate, 17/12/2024, 1:49 pm Modified By: Ankita.Dhangate, 17/12/2024, 1:49 pm

General Options

Required: Unique: External ID:

Default Value:

Validation Rules

No validation rules defined.

The screenshot shows the Salesforce Setup interface for creating a custom field. The object is 'Customer Details' and the field name is 'Phone number'. The field type is 'Phone'. The 'Field Information' section includes details like Field Label ('Phone number'), Field Name ('Phone_number'), API Name ('Phone_number__c'), and Data Type ('Phone'). The 'General Options' section shows 'Required' is checked. The 'Validation Rules' section indicates 'No validation rules defined.' The page also includes links for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. A sidebar on the left lists various setup categories.

11. Creation of Lookup Fields

The screenshot shows the Salesforce Setup interface for creating a custom field. The object is 'Appointment' and the field name is 'Customer Details'. The field type is 'Lookup'. The 'Field Information' section includes details like Field Label ('Customer Details'), Field Name ('Customer_Details'), API Name ('Customer_Details__c'), and Data Type ('Lookup'). The 'General Options' section shows 'Required' is checked. The 'Lookup Options' section specifies the related object as 'Customer Details' and the child relationship name as 'Appointments'. The 'Validation Rules' section indicates 'No validation rules defined.' The page also includes links for 'Edit', 'Set Field-Level Security', 'View Field Accessibility', and 'Where is this used?'. A sidebar on the left lists various setup categories. The bottom of the screen shows the Windows taskbar with various application icons.

Service records

Custom Field Definition Detail

Field Information	Object Name	Service records
Field Label: Appointment	Data Type	Lookup
Field Name: Appointment		
API Name: Appointment_c		
Description:		
Help Text:		
Data Owner:		
Field Usage:		
Data Sensitivity Level:		
Compliance Categorization:		
Created By: Ankita.Dhangate, 17/12/2024, 3:36 pm	Modified By	Ankita.Dhangate, 17/12/2024, 3:36 pm

Lookup Options

Related To	Appointment	Child Relationship Name	Service_records
Related List Label:	Service records		
Required:	✓		
What to do if the lookup record is deleted?	Don't allow deletion of the lookup record that's part of a lookup relationship.		

Lookup Filter

Filter Criteria	Appointment: Appointment Date LESS THAN Appointment: Created Date
Filter Type:	Required. The user-entered value must match filter criteria.
Error Message:	Value does not exist or does not match filter criteria.
Lookup Window Text:	

Billing details and feedback

Custom Field Definition Detail

Field Information	Object Name	Billing_details_and_feedback
Field Label: Service records	Data Type	Lookup
Field Name: Service_records		
API Name: Service_records__c		
Description:		
Help Text:		
Data Owner:		
Field Usage:		
Data Sensitivity Level:		
Compliance Categorization:		
Created By: Ankita.Dhangate, 17/12/2024, 3:39 pm	Modified By	Ankita.Dhangate, 17/12/2024, 3:39 pm

Lookup Options

Related To	Service records	Child Relationship Name	Billing_details_and_feedback
Related List Label:	Billing details and feedback		
Required:	✓		
What to do if the lookup record is deleted?	Clear the value of this field.		

Validation Rules

Help for this Page

12.Creation of Checkbox Fields

Setup Home Object Manager

SETUP > OBJECT MANAGER
Appointment

Appointment Custom Field
Repairs
Back to Appointment

Custom Field Definition Detail

Field Information

Field Label	Repairs	Object Name	Appointment
Field Name	Repairs	Data Type	Checkbox
API Name	Repairs__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Validation Rules

Created By: Ankita.Dhagat, 17/12/2024, 3:47 pm Modified By: Ankita.Dhagat, 17/12/2024, 3:47 pm

General Options

Default Value: Unchecked

Field Dependencies

No dependencies defined.

Validation Rules

No validation rules defined.

Help for this Page

Always show me more records per related list

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 Object Access Triggers

Search Setup

Help for this Page

Always show me more records per related list

Setup Home Object Manager

SETUP > OBJECT MANAGER
Appointment

Appointment Custom Field
Maintenance service
Back to Appointment

Custom Field Definition Detail

Field Information

Field Label	Maintenance service	Object Name	Appointment
Field Name	Maintenance_service	Data Type	Checkbox
API Name	Maintenance_service__c		
Description			
Help Text			
Data Owner			
Field Usage			
Data Sensitivity Level			
Compliance Categorization			

Validation Rules

Created By: Ankita.Dhagat, 17/12/2024, 3:43 pm Modified By: Ankita.Dhagat, 17/12/2024, 3:43 pm

General Options

Default Value: Unchecked

Field Dependencies

No dependencies defined.

Validation Rules

No validation rules defined.

Help for this Page

Always show me more records per related list

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 Object Access Triggers

Search Setup

Help for this Page

Always show me more records per related list

The screenshot shows the Salesforce Setup interface under the Object Manager. A custom field named 'Quality Check Status' is being created for the 'Service records' object. The field is defined as a checkbox type. The 'Field Information' section includes details like Field Label ('Quality Check Status'), Field Name ('Quality_Check_Status'), API Name ('Quality_Check_Status__c'), and Data Type ('Checkbox'). The 'General Options' section shows the default value as 'Unchecked'. The 'Validation Rules' section indicates no validation rules are defined.

13. Creation of Currency Fields

The screenshot shows the Salesforce Setup interface under the Object Manager. A custom field named 'Service Amount' is being created for the 'Appointment' object. The field is defined as a currency type. The 'Field Information' section includes details like Field Label ('Service Amount'), Field Name ('Service_Amount'), API Name ('Service_Amount__c'), and Data Type ('Currency'). The 'General Options' section shows the required status is checked. The 'Currency Options' section specifies a length of 18 and decimal places of 0. The 'Validation Rules' section indicates no validation rules are defined.

The screenshot shows the Salesforce Setup interface with the following details:

- Object Manager:** Billing details and feedback
- Custom Field Definition Detail:** Payment Paid
- Field Information:**
 - Field Label: Payment Paid
 - Field Name: Payment_Paid
 - API Name: Payment_Paid_c
 - Description: Help Text
 - Data Owner: Field Usage
 - Data Sensitivity Level: Compliance Categorization
- Validation Rules:** None listed.
- Lookup Options:**
 - Related To: Service records
 - Related List Label: Billing details and feedback (Payment Paid)
 - Required:
 - What to do if the lookup record is deleted?: Clear the value of this field.
- Child Relationship Name:** Billing_details_and_feedback1
- Object Name:** Billing details and feedback
- Data Type:** Lookup
- Created By:** Arkita Dhangate, 17/12/2024, 4:16 pm
- Modified By:** Arkita Dhangate, 17/12/2024, 4:16 pm

14. Creation of Text Fields

The screenshot shows the Salesforce Setup interface with the following details:

- Object Manager:** Appointment
- Custom Field Definition Detail:** Vehicle number plate
- Field Information:**
 - Field Label: Vehicle number plate
 - Field Name: Vehicle_number_plate
 - API Name: Vehicle_number_plate_c
 - Description: Help Text
 - Data Owner: Field Usage
 - Data Sensitivity Level: Compliance Categorization
- Validation Rules:** None listed.
- General Options:**
 - Required:
 - Unique:
 - Case Sensitive:
 - External ID:
 - Default Value: None
- Text Options:** Length: 10
- Validation Rules:**

Action	Rule Name	Error Message	Active	Modified By
Edit Del	Vehicle	Please enter valid number	<input checked="" type="checkbox"/>	Arkita Dhangate, 17/12/2024, 4:20 pm

The screenshot shows the Salesforce Setup interface under the Object Manager. A custom field named "Rating for service" is being created for the object "Billing details and feedback". The field is defined as a text type with a length of 1. A validation rule is defined: "rating should be less than 5".

Action	Rule Name	Error Message	Active	Modified By
Edit Del	rating_should_be_less_than_5	rating should be from 1 to 5	✓	Ankita Dhangate 17/12/2024, 4:23 pm

15. Creation of Picklist Fields:

The screenshot shows the Salesforce Setup interface under the Object Manager. A picklist field named "Service Status" is being created for the object "Service records". The field has a single value: "Started".

Action	Values	API Name	Default	Chart Colors	Modified By
Edit Del Dissociate	Started	Started		Assigned dynamically	Ankita Dhangate 17/12/2024, 4:27 pm

The screenshot shows the Salesforce Setup interface for creating a custom field. The object selected is 'Billing details and feedback'. The field being created is 'Payment Status', which is a picklist type field. The field information includes:

- Field Label:** Payment Status
- Field Name:** Payment_Status
- API Name:** Payment_Status_c
- Description:** Not set
- Data Owner:** Not set
- Data Sensitivity Level:** Not set
- Compliance Categorization:** Not set
- Created By:** Ankita.Dhagate, 17/12/2024, 4:29 pm
- Modified By:** Ankita.Dhagate, 17/12/2024, 4:29 pm

The 'General Options' section shows that it is required and has a default value of 'New'. Under 'Picklist Options', it is noted that the picklist is restricted to values defined in the value set. The 'Value Set' section lists two values: 'Pending' and 'Completed'. The 'Validation Rules' section is currently empty.

16.Creating Formula Field in Service records Object

The screenshot shows the Salesforce Setup interface for creating a formula field. The object selected is 'Service records'. The field being created is 'service date', which is a formula type field. The field information includes:

- Field Label:** service date
- Field Name:** service_date
- API Name:** service_date_c
- Description:** Not set
- Help Text:** Not set
- Data Owner:** Not set
- Data Sensitivity Level:** Not set
- Compliance Categorization:** Not set
- Created By:** Ankita.Dhagate, 17/12/2024, 4:33 pm
- Modified By:** Ankita.Dhagate, 17/12/2024, 4:33 pm

The 'Formula Options' section shows that the data type is 'Formula' and the formula used is 'CreatedDate'.

17.To create a validation rule to an Appointment Object

The screenshot shows the Salesforce Setup interface under the Object Manager section for the 'Appointment' object. On the left, a sidebar lists various setup categories like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled 'Appointment Validation Rule' and displays the 'Validation Rule Detail' for a rule named 'Vehicle'. The rule's formula is 'NOT(REGEX(Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))'. It includes an error message 'Please enter valid number' and is active. The 'Error Location' is set to 'Vehicle number plate'. The rule was created by Ankita Dhagale on 17/12/2024, 4:40 pm, and modified by the same user on the same date.

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

The screenshot shows the Salesforce Setup interface under the Object Manager section for the 'Billing details and feedback' object. The sidebar lists various setup categories. The main content area is titled 'Billing details and feedback Validation Rule' and displays the 'Validation Rule Detail' for a rule named 'rating_should_be_less_than_5'. The rule's formula is 'NOT(REGEX(Rating_for_service__c , "[1-5]{1}"))'. It includes an error message 'rating should be from 1 to 5' and is active. The 'Error Location' is set to 'Rating for service'. The rule was created by Ankita Dhagale on 17/12/2024, 4:43 pm, and modified by the same user on the same date.

19.To create a matching rule to an Customer details Object

d SETUP Matching Rules

Matching Rule
Matching customer details Help for this Page ?

Matching Rule Detail

Object	Customer Details	Delete	Clone	Deactivate
Rule Name	Matching customer details			
Unique Name	Matching_customer_details			
Description				
Matching Criteria	(Customer Details: Gmail EXACT MatchBlank = FALSE) AND (Customer Details: Phone_number EXACT MatchBlank = FALSE)			
Status	Active			
Created By	Ankita.Dhagate, 17/12/2024, 4:47 pm	Modified By	Ankita.Dhagate, 17/12/2024, 4:47 pm	

20.To create a Duplicate rule to an Customer details Object

d SETUP Duplicate Rules

Customer Details Duplicate Rule
Customer Detail duplicate Help for this Page ?

Duplicate Rule Detail

Rule Name	Customer Detail duplicate	Edit	Delete	Clone	Deactivate	
Description						
Object	Customer Details	Order	1 of 1 [Reorder] i			
Record-Level Security	Enforce sharing rules					
Action On Create	Allow	Operations On Create	<input checked="" type="checkbox"/> Alert <input checked="" type="checkbox"/> Report			
Action On Edit	Allow	Operations On Edit	<input type="checkbox"/> Alert <input type="checkbox"/> Report			
Alert Text	Use one of these records?					
Active	<input checked="" type="checkbox"/>					
Matching Rule	<input checked="" type="checkbox"/> Matching_customer_details Mapped	Matching Criteria	(Customer Details: Gmail EXACT MatchBlank = FALSE) AND (Customer Details: Phone_number EXACT MatchBlank = FALSE)			
Conditions						
Created By	Ankita.Dhagate, 17/12/2024, 4:51 pm	Modified By	Ankita.Dhagate, 17/12/2024, 4:51 pm			

21.Manager Profile

SETUP Profiles

Profile Manager

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[0\]](#) | [Enabled Visualforce Page Access \[0\]](#) | [Enabled External Data Source Access \[0\]](#) | [Enabled Named Credential Access \[0\]](#) | [Enabled External Credential Principal Access \[0\]](#) | [Enabled Custom Metadata Type Access \[0\]](#) | [Enabled Custom Setting Definitions Access \[0\]](#) | [Enabled Flow Access \[0\]](#) | [Enabled Service Presence Status Access \[0\]](#) | [Enabled Custom Permissions \[0\]](#)

Profile Detail		Edit	Clone	Delete	View Users
Name	Manager				
User License	Salesforce				Custom Profile <input checked="" type="checkbox"/>
Description					
Created By	Ankita Dhagate, 17/12/2024, 4:54 pm				Modified By Ankita Dhagate, 17/12/2024, 4:57 pm

Page Layouts

Standard Object Layouts					
Global	Global Layout [View Assignment]		Invoice	Invoice Layout [View Assignment]	
Email Application	Not Assigned [View Assignment]		Invoice Line	Invoice Line Layout [View Assignment]	
Home Page Layout	DE Default [View Assignment]		Lead	Lead Layout [View Assignment]	
Account	Account Layout [View Assignment]		Legal Entity	Legal Entity Layout [View Assignment]	
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]		Location	Location Layout [View Assignment]	
Appointment Invitation	Appointment Invitation Layout [View Assignment]		Location Group	Location Group Layout [View Assignment]	

22.sales person Profile

SETUP Profiles

Profile sales person

Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Login IP Ranges \[0\]](#) | [Enabled Apex Class Access \[0\]](#) | [Enabled Visualforce Page Access \[0\]](#) | [Enabled External Data Source Access \[0\]](#) | [Enabled Named Credential Access \[0\]](#) | [Enabled External Credential Principal Access \[0\]](#) | [Enabled Custom Metadata Type Access \[0\]](#) | [Enabled Custom Setting Definitions Access \[0\]](#) | [Enabled Flow Access \[0\]](#) | [Enabled Service Presence Status Access \[0\]](#) | [Enabled Custom Permissions \[0\]](#)

Profile Detail		Edit	Clone	Delete	View Users
Name	sales person				Custom Profile <input checked="" type="checkbox"/>
User License	Salesforce Platform				
Description					
Created By	Ankita Dhagate, 17/12/2024, 5:17 pm				Modified By Ankita Dhagate, 17/12/2024, 5:18 pm

Page Layouts

Standard Object Layouts					
Global	Global Layout [View Assignment]		Fulfillment Order Item Tax	Fulfillment Order Item Tax Layout [View Assignment]	
Email Application	Not Assigned [View Assignment]		Fulfillment Order Product	Fulfillment Order Product Layout [View Assignment]	
Home Page Layout	Home Page Default [View Assignment]		Item	Varies by Record Type [View Assignment]	
Account	Account Layout [View Assignment]		Individual	Individual Layout [View Assignment]	
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]		Invoice	Invoice Layout [View Assignment]	
Appointment Invitation	Appointment Invitation Layout [View Assignment]		Invoice Line	Invoice Line Layout [View Assignment]	

23.Creating Manager Role

SETUP Roles

Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role Hierarchy

View other sample Role Hierarchies: [Territory-based Sample](#)

```

graph TD
    CEO[CEO President] --> WesternSalesDir[Western Sales Director]
    CEO --> EasternSalesDir[Eastern Sales Director]
    CEO --> IntSalesDir[Int'l Sales Director]
    CFO[VP, Sales] --> WesternSalesDir
    CFO --> EasternSalesDir
    CFO --> IntSalesDir
    WesternSalesDir --> CARep[CA Sales Rep]
    WesternSalesDir --> ORRep[OR Sales Rep]
    EasternSalesDir --> NYRep[NY Sales Rep]
    EasternSalesDir --> MARep[MA Sales Rep]
    IntSalesDir --> AsianRep[Asian Sales Rep]
    IntSalesDir --> EuropeanRep[European Sales Rep]
  
```

The diagram illustrates a role hierarchy with three main levels:

- Executive Staff:** CEO, President, CFO, VP, Sales. The CEO has three direct reports: Western Sales Director, Eastern Sales Director, and International Sales Director. The CFO also has these three reports. The CEO and CFO can view & edit data, roll up forecasts, & generate reports for all users below them, but cannot access data of other Executive Staff.
- Western Sales Director, Eastern Sales Director, International Sales Director:** Each has two direct reports. They can view & edit data, roll up forecasts, & generate reports for all users directly below them, but cannot access data of users above or at the same level.
- Sales Reps:** CA Sales Rep, OR Sales Rep, NY Sales Rep, MA Sales Rep, Asian Sales Rep, European Sales Rep. They can view & edit data, roll up forecasts, & generate reports only for own data, and cannot access data of users above or at the same level.

Set Up Roles

Don't show this page again

[Help for this Page](#)

SETUP Roles

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

[Collapse All](#) [Expand All](#)

- DKTE
 - └ Add Role
 - └ CEO [Edit](#) | [Del](#) | [Assign](#)
 - └ Add Role
 - └ CFO [Edit](#) | [Del](#) | [Assign](#)
 - └ Add Role
 - └ COO [Edit](#) | [Del](#) | [Assign](#)
 - └ Add Role
 - └ Manager [Edit](#) | [Del](#) | [Assign](#)
 - └ Add Role
 - └ SVP, Customer Service & Support [Edit](#) | [Del](#) | [Assign](#)
 - └ Add Role
 - └ Customer Support, International [Edit](#) | [Del](#) | [Assign](#)
 - └ Add Role
 - └ Customer Support, North America [Edit](#) | [Del](#) | [Assign](#)
 - └ Add Role
 - └ Installation & Repair Services [Edit](#) | [Del](#) | [Assign](#)
 - └ Add Role
 - └ SVP, Human Resources [Edit](#) | [Del](#) | [Assign](#)

[Show in tree view](#)

[Help for this Page](#)

The screenshot shows a 'Role Edit' form for creating a new role. The top navigation bar includes a user icon, 'SETUP', and 'Roles'. The main title is 'Role Edit' and the sub-section is 'New Role'. The form fields are as follows:

- Label:** Manager
- Role Name:** Manager
- This role reports to:** CEO
- Role Name as displayed on reports:** (empty field)

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

24.Creating another roles

The screenshot shows the 'Creating the Role Hierarchy' page. The top navigation bar includes a user icon, 'SETUP', and 'Roles'. The main title is 'Creating the Role Hierarchy'. A message says: 'You can build on the existing role hierarchy shown on this page. To insert a new role, click Add Role.' Below this is a tree view of the 'Your Organization's Role Hierarchy'.

Tree View Structure:

- DKTE
 - Add Role
 - CEO
 - Add Role
 - CFO
 - Add Role
 - COO
 - Add Role
 - Manager
 - Add Role
 - SVP.Customer Service & Support
 - Add Role
 - Customer Support, International
 - Add Role
 - Customer Support, North America
 - Add Role
 - Installation & Repair Services
 - Add Role
 - SVP.Human Resources
 - Add Role

Buttons at the top right include 'Help for this Page' and 'Show in tree view'.

Role Edit
New Role

Role Edit

| | |
|-----------------------------------|--|
| Label | <input type="text" value="sales person"/> |
| Role Name | <input type="text" value="sales_person"/> <small>i</small> |
| This role reports to | <input type="text" value="Manager"/> <small>🔍</small> |
| Role Name as displayed on reports | <input type="text"/> |

Save **Save & New** **Cancel**

25.Create User

Users

User **Niklaus Mikaelson**

Permission Set Assignments Activation Required | Permission Set Group Assignments Group | Permission Set License Assignments Group | Personal Groups Group | Public Group Membership Group | Queue Membership Group | Team Group | Managers in the Role Hierarchy Group | OAuth Apps Group | Third-Party Account Links Group | Installed Mobile Apps Group | Authentication Settings for External Systems Group | Login History Group | User Provisioning Accounts Group

User Detail

| | | | |
|--|---|---|-------------------------------------|
| Name | Niklaus Mikaelson | Role | Manager |
| Alias | nnika | User License | Salesforce |
| Email | bhamadhapole@gmail.com <small>Verify</small> <small>i</small> | Profile | Manager |
| Username | ankitkhan@okt.com | Active | <input checked="" type="checkbox"/> |
| Nickname | nik <small>i</small> | Marketing User | <input type="checkbox"/> |
| Title | | Offline User | <input type="checkbox"/> |
| Company | | Knowledge User | <input type="checkbox"/> |
| Department | | Flow User | <input type="checkbox"/> |
| Division | | Service Cloud User | <input type="checkbox"/> |
| Address | | Site.com Contributor User | <input type="checkbox"/> |
| Time Zone | (GMT+05:30) India Standard Time (Asia/Kolkata) | Site.com Publisher User | <input type="checkbox"/> |
| Locale | English (India) | WDC User | <input type="checkbox"/> |
| Language | English | Mobile Push Registrations | <small>View</small> |
| Delegated Approver | Manager | Data.com User Type | <small>i</small> |
| Receive Approval Request Emails | Only if I am an approver | Accessibility Mode (Classic Only) | <input type="checkbox"/> |
| Federation ID | | Debug Mode | <input type="checkbox"/> |
| App Registration: One-Time Password Authenticator | <small>i</small> | High-Contrast Palette on Charts | <input type="checkbox"/> |
| App Registration: Salesforce Authenticator | <small>i</small> | Load Lightning Pages While Scrolling | <input checked="" type="checkbox"/> |
| Security Key (2FA or WebAuthn) | <small>i</small> | Salesforce CRM Content User | <input checked="" type="checkbox"/> |
| Lightning Login | <small>i</small> | Receive Salesforce CRM Content Email Alerts | <input checked="" type="checkbox"/> |
| Temporary Verification Code (Expires in 1 to 24 Hours) | <small>Generated</small> <small>i</small> | Receive Salesforce CRM Content Alerts as Daily Digest | <input checked="" type="checkbox"/> |
| | | Make Setup My Default Landing Page | <input type="checkbox"/> |
| | | Allow Forecasting | <input type="checkbox"/> |
| | | No MRU Updates | <input type="checkbox"/> |
| | | Call Center | <input type="checkbox"/> |
| | | Phone | <input type="checkbox"/> |
| | | Extension | <input type="checkbox"/> |
| | | Fax | <input type="checkbox"/> |

User

Tanvi Kore

Permission Set Assignments | Permission Set Assignments: Activation Required | Permission Set Group Assignments | Permission Set License Assignments | Personal Groups | Public Group Membership | Queue Membership | Team | Managers in the Role Hierarchy | OAuth Apps | Third-Party Account Links

Installed Mobile Apps | Authentication Settings for External Systems | Login History | User Provisioning Accounts

User Detail

| | | | |
|--|--|---|-------------------------------------|
| Name | Tanvi Kore | Role | salesperson |
| Alias | Blore | User License | Salesforce Platform |
| Email | bharadaghate@gmail.com [Verify] | Profile | salesperson |
| Username | tanvi@dkte.com | Active | <input checked="" type="checkbox"/> |
| Nickname | tanu | Marketing User | <input type="checkbox"/> |
| Title | | Offline User | <input type="checkbox"/> |
| Company | | Knowledge User | <input type="checkbox"/> |
| Department | | Flow User | <input type="checkbox"/> |
| Division | | Service Cloud User | <input type="checkbox"/> |
| Address | | Site.com Contributor User | <input type="checkbox"/> |
| Time Zone | (GMT+05:30) India Standard Time (Asia/Kolkata) | Mobile Push Registrations | View |
| Locale | English (India) | Data.com User Type | View |
| Language | English | Accessibility Mode (Classic Only) | <input type="checkbox"/> |
| Delegated Approver | | Debug Mode | <input type="checkbox"/> |
| Manager | | High-Contrast Palette on Charts | <input type="checkbox"/> |
| Receive Approval Request Emails | Only if I am an approver | Load Lightning Pages While Scrolling | <input checked="" type="checkbox"/> |
| Federation ID | | Salesforce CRM Content User | <input checked="" type="checkbox"/> |
| App Registration: One-Time Password Authenticator | [i] | Receive Salesforce CRM Content Email Alerts | <input checked="" type="checkbox"/> |
| App Registration: Salesforce Authenticator | [i] | Receive Salesforce CRM Content Alerts as Daily Digest | <input checked="" type="checkbox"/> |
| Security Key (UI2 or WebAuthn) | [i] | Make Setup My Default Landing Page | <input type="checkbox"/> |
| Lightning Login | [i] | Allow Forecasting | <input type="checkbox"/> |
| Temporary Verification Code (Expires in 1 to 24 Hours) | [Generate] [i] | No MRU Updates | <input type="checkbox"/> |
| | | Call Center | <input type="checkbox"/> |
| | | Phone | <input type="checkbox"/> |
| | | Extension | <input type="checkbox"/> |
| | | Fax | <input type="checkbox"/> |

User ProfileHelp for this Page [\[i\]](#)

User

Anushka Patil

Permission Set Assignments | Permission Set Assignments: Activation Required | Permission Set Group Assignments | Permission Set License Assignments | Personal Groups | Public Group Membership | Queue Membership | Team | Managers in the Role Hierarchy | OAuth Apps | Third-Party Account Links

Installed Mobile Apps | Authentication Settings for External Systems | Login History | User Provisioning Accounts

User Detail

| | | | |
|--|--|---|-------------------------------------|
| Name | Anushka Patil | Role | salesperson |
| Alias | apati | User License | Salesforce Platform |
| Email | bharadaghate@gmail.com [Verify] | Profile | salesperson |
| Username | anushka@dkte.com | Active | <input checked="" type="checkbox"/> |
| Nickname | anu | Marketing User | <input type="checkbox"/> |
| Title | | Offline User | <input type="checkbox"/> |
| Company | | Knowledge User | <input type="checkbox"/> |
| Department | | Flow User | <input type="checkbox"/> |
| Division | | Service Cloud User | <input type="checkbox"/> |
| Address | | Site.com Contributor User | <input type="checkbox"/> |
| Time Zone | (GMT+05:30) India Standard Time (Asia/Kolkata) | Mobile Push Registrations | View |
| Locale | English (India) | Data.com User Type | View |
| Language | English | Accessibility Mode (Classic Only) | <input type="checkbox"/> |
| Delegated Approver | | Debug Mode | <input type="checkbox"/> |
| Manager | | High-Contrast Palette on Charts | <input type="checkbox"/> |
| Receive Approval Request Emails | Only if I am an approver | Load Lightning Pages While Scrolling | <input checked="" type="checkbox"/> |
| Federation ID | | Salesforce CRM Content User | <input checked="" type="checkbox"/> |
| App Registration: One-Time Password Authenticator | [i] | Receive Salesforce CRM Content Email Alerts | <input checked="" type="checkbox"/> |
| App Registration: Salesforce Authenticator | [i] | Receive Salesforce CRM Content Alerts as Daily Digest | <input checked="" type="checkbox"/> |
| Security Key (UI2 or WebAuthn) | [i] | Make Setup My Default Landing Page | <input type="checkbox"/> |
| Lightning Login | [i] | Allow Forecasting | <input type="checkbox"/> |
| Temporary Verification Code (Expires in 1 to 24 Hours) | [Generate] [i] | No MRU Updates | <input type="checkbox"/> |
| | | Call Center | <input type="checkbox"/> |
| | | Phone | <input type="checkbox"/> |
| | | Extension | <input type="checkbox"/> |
| | | Fax | <input type="checkbox"/> |

User ProfileHelp for this Page [\[i\]](#)

User Mukesh Kadam

Permission Set Assignments | Permission Set Assignments: Activation Required | Permission Set Group Assignments | Permission Set License Assignments | Personal Groups | Public Group Membership | Queue Membership | Team | Managers in the Role Hierarchy | OAuth Apps | Third-Party Account Links | Installed Mobile Apps | Authentication Settings for External Systems | Login History | User Provisioning Accounts

User Detail

| | | | |
|--|--|---|--|
| Name | Mukesh Kadam | Role | sales person |
| Alias | mksda | User License Profile | sales person |
| Email | pharmaghate@gmail.com (Verify) | Active | <input checked="" type="checkbox"/> |
| Username | mukesh@dtse.com | Marketing User | <input type="checkbox"/> |
| Nickname | muk | Offline User | <input type="checkbox"/> |
| Title | | Knowledge User | <input type="checkbox"/> |
| Company | | Flow User | <input type="checkbox"/> |
| Department | | Service Cloud User | <input type="checkbox"/> |
| Division | | Site.com Contributor User | <input type="checkbox"/> |
| Address | | Site.com Publisher User | <input type="checkbox"/> |
| Time Zone | (GMT+05:30) India Standard Time (Asia/Kolkata) | WDC User | <input type="checkbox"/> |
| Locale | English (India) | Mobile Push Registrations | <input type="checkbox"/> View |
| Language | English | Data.com User Type | <input type="checkbox"/> Data |
| Delegated Approver | | Accessibility Mode (Classic Only) | <input type="checkbox"/> Classic |
| Manager | | Debug Mode | <input type="checkbox"/> Debug |
| Receive Approval Request Emails | Only if I am an approver | High-Contrast Palette on Charts | <input type="checkbox"/> High Contrast |
| Federation ID | | Load Lightning Pages While Scrolling | <input checked="" type="checkbox"/> Load Lightning |
| App Registration: One-Time Password Authenticator | [i] | Salesforce CRM Content User | <input checked="" type="checkbox"/> Salesforce CRM Content |
| App Registration: Salesforce Authenticator | [i] | Receive Salesforce CRM Content Email Alerts | <input checked="" type="checkbox"/> Receive Email |
| Security Key (U2F or WebAuthn) | [i] | Receive Salesforce CRM Content Alerts as Daily Digest | <input checked="" type="checkbox"/> Receive Digest |
| Lightning Login | [i] | Make Setup My Default Landing Page | <input type="checkbox"/> |
| Temporary Verification Code (Expires in 1 to 24 Hours) | [Generate] [i] | Allow Forecasting | <input type="checkbox"/> |
| | | No MRC Updates | <input type="checkbox"/> No MRC |
| | | Call Center | <input type="checkbox"/> |
| | | Phone | <input type="checkbox"/> |
| | | Extension | <input type="checkbox"/> |
| | | Fax | <input type="checkbox"/> |

26.Creating Public Group

Group sales team

Help for this Page ?

Label sales team

Group Name sales_team

Grant Access Using Hierarchies

Description

Created By Ankita.Dhagate, 18/12/2024, 12:18 am Modified By Ankita.Dhagate, 18/12/2024, 12:18 am

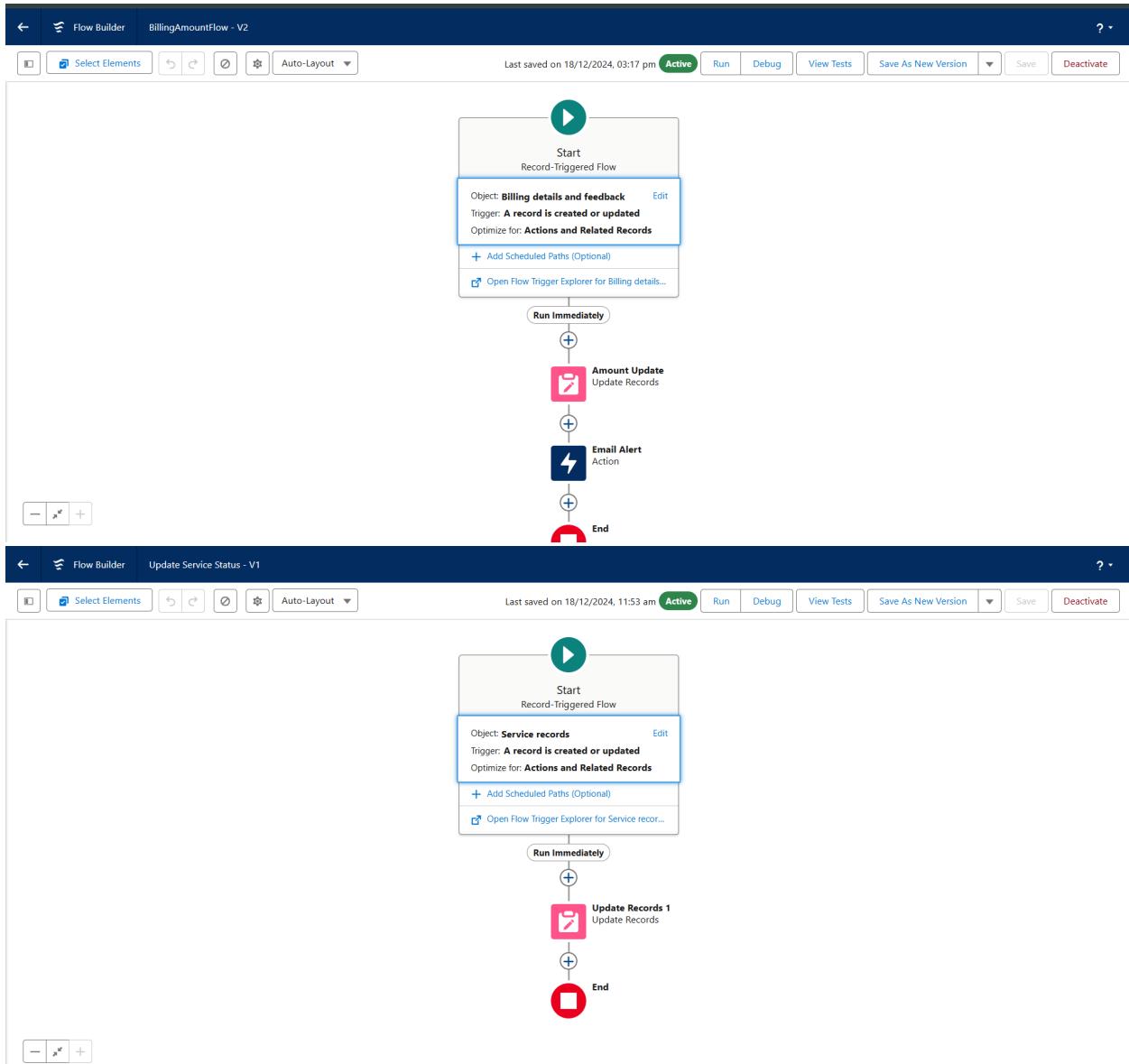
[View All Users](#)

| Name | Type |
|--------------|------|
| sales_person | Role |

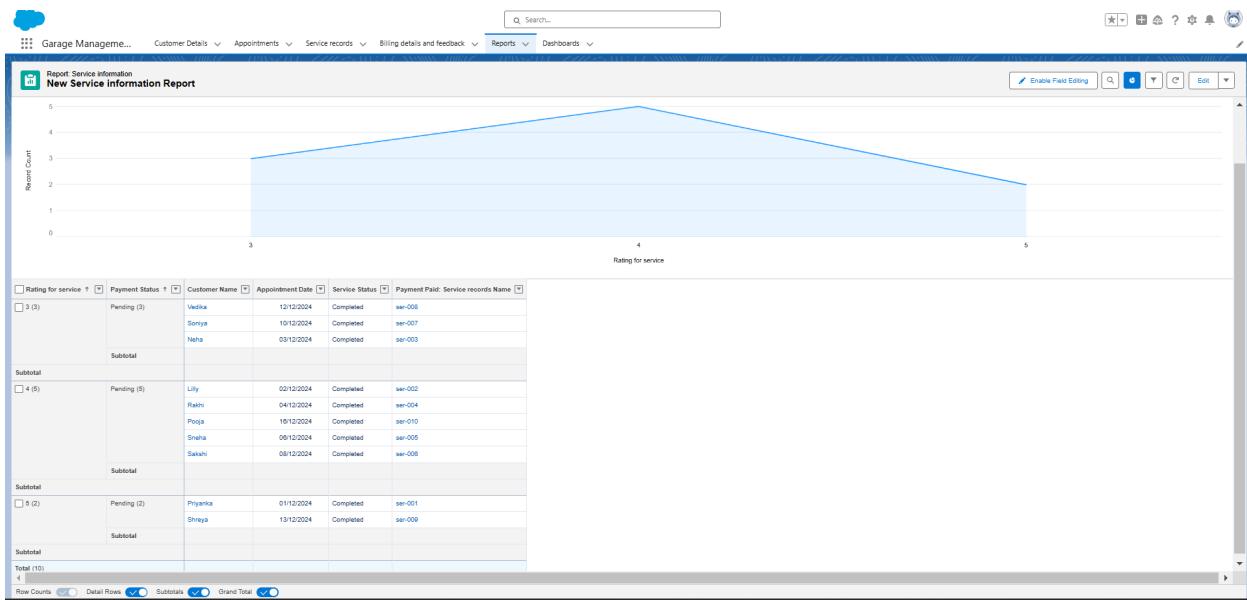
27.Creating Sharing settings

| Service records Sharing Rules | | New | Recalculate | Service records Sharing Rules Help ? |
|--|-----------------------------|---------------|--------------|--------------------------------------|
| Action | Criteria | Shared With | Access Level | |
| Edit Del | Owner in Role: sales person | Role: Manager | ReadWrite | |

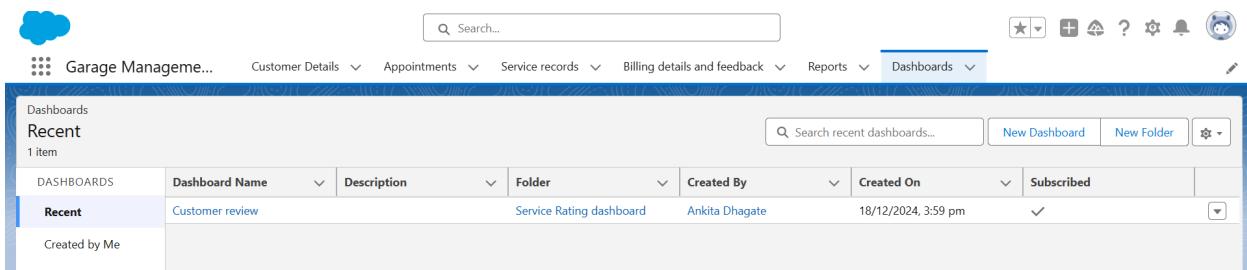
28.Create a Flow



29. Reports



30.Dashboard

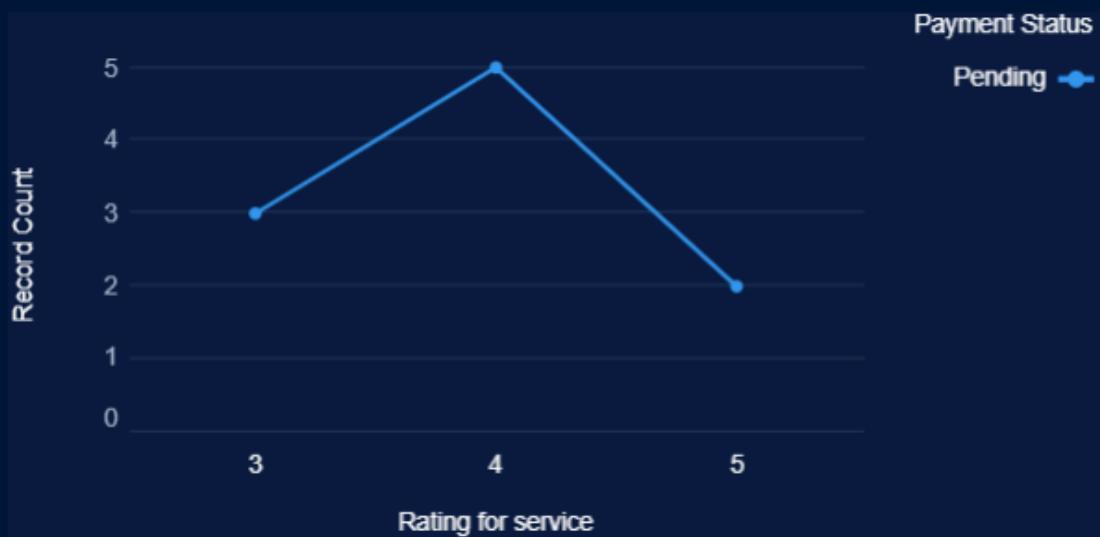




Dashboard
Customer review

As of 18-Dec-2024, 4:07 pm-Viewing as Ankita Dhagate

New Service information Report



[View Report \(New Service information Report\)](#)

31.User Adoption

Edit ser-011

* = Required Information

| | |
|---|---|
| Service records Name
ser-011 | Owner
 Ankita Dhagate |
| * Appointment
<input type="text" value="app-011"/> | |
| Quality Check Status
<input checked="" type="checkbox"/> | |
| Service Status
<input type="text" value="Started"/> | |
| service date
18/12/2024 | |
| <i>This field is calculated upon save</i> | |
| Created By
 Ankita Dhagate, 18/12/2024, 4:19 pm | Last Modified By
 Ankita Dhagate, 18/12/2024, 4:19 pm |
| <input type="button" value="Cancel"/> <input type="button" value="Save & New"/> <input type="button" value="Save"/> | |

5. Testing and Validation :

AmountDistributionHandler :

```
public class AmountDistributionHandler {
```

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

```
        list<Service_records__c> serList = new list <Service_records__c>();
```

```
        for(Appointment__c app : listApp){
```

```
            if(app.Maintenance_service__c == true && app.Repairs__c == true &&  
            app.Replacement_Parts__c == true){
```

```
    app.Service_Amount__c = 10000;  
}  
  
else if(app.Maintenance_service__c == true && app.Repairs__c == true){  
  
    app.Service_Amount__c = 5000;  
}  
  
else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){  
  
    app.Service_Amount__c = 8000;  
}  
  
else if(app.Repairs__c == true && app.Replacement_Parts__c == true){  
  
    app.Service_Amount__c = 7000;  
}  
  
else if(app.Maintenance_service__c == true){  
  
    app.Service_Amount__c = 2000;  
}  
  
else if(app.Repairs__c == true){  
  
    app.Service_Amount__c = 3000;  
}  
  
else if(app.Replacement_Parts__c == true){  
  
    app.Service_Amount__c = 5000;  
}
```

```
    }  
  
}  
  
}
```

AmountDistribution:

```
trigger AmountDistribution on Appointment__c (before insert, before update) {
```

```
    if(trigger.isbefore && trigger.isinsert || trigger.isupdate){  
  
        AmountDistributionHandler.amountDist(trigger.new);  
  
    }  
  
}
```

6. Conclusion :

The Garage Management System developed using Salesforce demonstrates the potential of cloud-based solutions in streamlining and enhancing garage operations. By leveraging Salesforce's robust features, the system ensures seamless management of customer interactions, vehicle service records, inventory tracking, and billing processes.

This project highlights the importance of automation and centralized data in improving efficiency, reducing errors, and delivering exceptional customer service. The scalability and

flexibility of the Salesforce platform allow the system to adapt to varying business needs, making it a valuable asset for modern garage businesses.

In conclusion, this project not only simplifies day-to-day operations but also provides actionable insights through analytics, empowering garages to make informed decisions and stay competitive in the automotive service industry. ☺