

Garage Management System

1. Project Overview

The **Garage Management System (GMS)** is a cloud-based solution developed using Salesforce to streamline and automate the operational processes of vehicle service garages. The system is designed to address common challenges faced by garages, such as inefficient scheduling, manual job tracking, and lack of centralized customer data. By leveraging Salesforce's powerful CRM capabilities, GMS provides a unified platform for managing customers, vehicles, appointments, job cards, invoicing, and reporting.

The system enhances operational efficiency through automation and offers real-time visibility into service workflows. Customers benefit from a self-service portal that allows them to book appointments, view service history, and receive updates, while garage staff can monitor job progress and manage resources more effectively. In addition to core functionality, the system integrates with third-party services like SMS and payment gateways to ensure seamless communication and financial transactions.

The modular design of GMS allows for future scalability, including potential enhancements such as mobile app integration and AI-driven maintenance recommendations. This project aims to deliver a robust, secure, and user-friendly system that not only meets the immediate needs of garage operations but also positions the business for future growth and innovation.

2. Objectives

The primary objectives of the **Garage Management System (GMS)** are focused on automating manual processes, enhancing customer experiences, improving operational efficiency, and providing actionable insights. The detailed objectives are as follows:

Business Goals :

1. Increase Operational Efficiency:

Automate and streamline garage operations, reducing the time spent on manual tasks like appointment scheduling, invoicing, and job tracking. This will enable staff to focus more on customer service and technical work, leading to improved overall productivity.

2. Enhance Customer Satisfaction:

Provide customers with a seamless, user-friendly experience, from appointment booking to job completion. By offering easy access to their service history, real-time updates, and automated reminders, GMS aims to improve customer engagement and loyalty.

3. Boost Revenue and Profitability:

By improving operational efficiency, increasing customer satisfaction, and enabling the management team to better track service revenue and costs, the GMS aims to drive growth in revenue. Automation of invoicing and payment processing will also reduce delays and improve cash flow.

4. Improve Data Accuracy and Decision-Making:

Centralizing customer, vehicle, and service data will eliminate errors associated with manual data entry and provide managers with actionable insights for better decision-making. The system's reporting and analytics capabilities will support data-driven strategies.

5. Support Scalability and Future Growth:

The system will be designed to scale as the business grows, allowing easy expansion to new locations or additional services. The ability to integrate new

features (like mobile apps or IoT integration) ensures that the GMS will evolve alongside the business.

Specific Outcomes:

1. Fully Functional Garage Management System:

A cloud-based solution built on Salesforce, providing all necessary features, including customer management, appointment scheduling, job tracking, billing, and reporting.

2. Centralized Customer and Vehicle Database:

A comprehensive database that consolidates all customer and vehicle information in one place, ensuring easy access to data for staff and reducing the risk of duplication or errors.

3. Automation of Key Business Processes:

Automated workflows for tasks like job card creation, appointment reminders, payment processing, and customer notifications, reducing manual effort and increasing process accuracy.

4. Real-Time Reporting and Dashboards:

Custom reports and dashboards that provide insights into garage performance, service profitability, technician productivity, and customer satisfaction, helping managers make informed business decisions.

5. Customer Self-Service Portal:

A portal where customers can easily book, reschedule, and track their appointments, as well as view service history and receive updates, improving transparency and engagement.

6. Seamless Integration with Third-Party Services:

Integration with external systems such as payment gateways and SMS/email services to streamline financial transactions and enhance communication.

7. User Training and Support Documentation:

Comprehensive training materials and user guides for staff to ensure smooth adoption and effective use of the system, alongside on-going technical support.

3. Detailed Steps to Solution Design

1. Custom Objects and Fields:

Salesforce's flexibility in creating custom objects and fields is essential for managing specific data related to garage operations that go beyond the standard CRM objects.

Custom objects:

In the **Garage Management System (GMS)**, several **custom objects** are used to effectively track and manage key aspects of the garage's operations, such as customer details, appointments, service records, billing, and feedback. These objects help ensure the system is customized to the garage's workflow and provides efficient data management and reporting.

1. Customer Details

This custom object stores all relevant information about the customer, including personal contact details and vehicle-specific data. It ensures a comprehensive view of each customer's service history and preferences.

2. Appointment

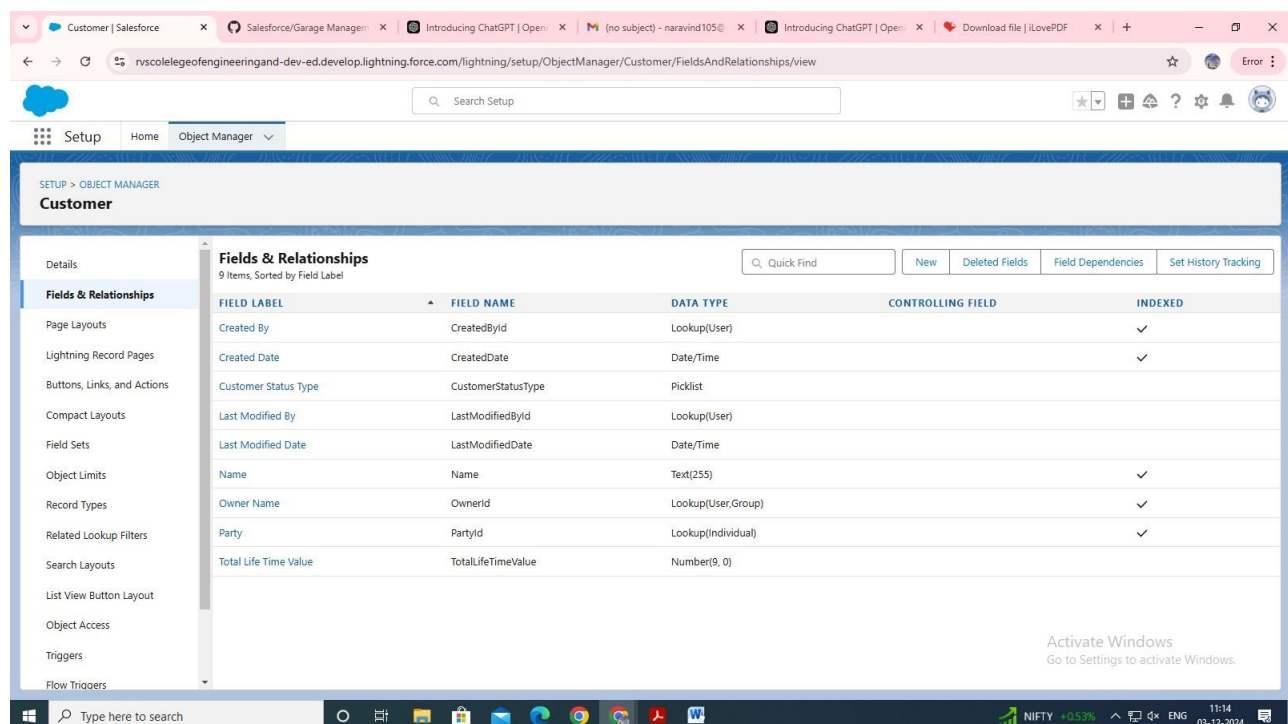
The **Appointment** custom object is used to manage and track customer appointments for services. It captures key details about each appointment, including the scheduled service, the technician assigned, and the status of the appointment.

3. Service Records

The **Service Records** custom object tracks the details of each service performed on a customer's vehicle. This includes the tasks completed, parts used, and technician notes, providing a detailed log of each service interaction.

4. Billing Details and Feedback

The **Billing Details** custom object manages financial transactions. It ensures accurate billing and payment processing for each job completed. The **Feedback** custom object allows customers to provide feedback on the service they received. This data is used to assess customer satisfaction and improve service quality by collecting ratings and comments on the garage's performance.



The screenshot shows the Salesforce Setup interface for the 'Customer' object. The 'Fields & Relationships' section is active, displaying a table of 9 fields. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The fields listed are: Created By, Created Date, Customer Status Type, Last Modified By, Last Modified Date, Name, Owner Name, Party, and Total Life Time Value.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		✓
Created Date	CreatedDate	Date/Time		✓
Customer Status Type	CustomerStatusType	Picklist		
Last Modified By	LastModifiedById	Lookup(User)		
Last Modified Date	LastModifiedDate	Date/Time		
Name	Name	Text(255)		✓
Owner Name	OwnerId	Lookup(User/Group)		✓
Party	PartyId	Lookup(Individual)		✓
Total Life Time Value	TotalLifeTimeValue	Number(9, 0)		

Appointment | Salesforce | Salesforce/Garage Manager | Introducing ChatGPT | Open | (no subject) - naravind105@ | Introducing ChatGPT | Open | Download file | iLovePDF | +

nvscrolegeofengineeringand-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01ldL000003FKcb/FieldsAndRelationships/view

Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Appointment

Details

Fields & Relationships
11 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment Date	Appointment_Date__c	Date		
Appointment Name	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Customer Details	Customer_Details__c	Lookup(Customer Details)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Maintenance service	Maintenance_service__c	Checkbox		
Owner	OwnerId	Lookup(User,Group)		✓
Repairs	Repairs__c	Checkbox		
Replacement Parts	Replacement_Parts__c	Checkbox		
Service Amount	Service_Amount__c	Currency(18, 0)		

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Appointment

Service records | Salesforce | Salesforce/Garage Manager | Introducing ChatGPT | Open | (no subject) - naravind105@ | Introducing ChatGPT | Open | Download file | iLovePDF | +

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Search Setup

Setup Home Object Manager

SETUP > OBJECT MANAGER

Service records

Details

Fields & Relationships
8 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

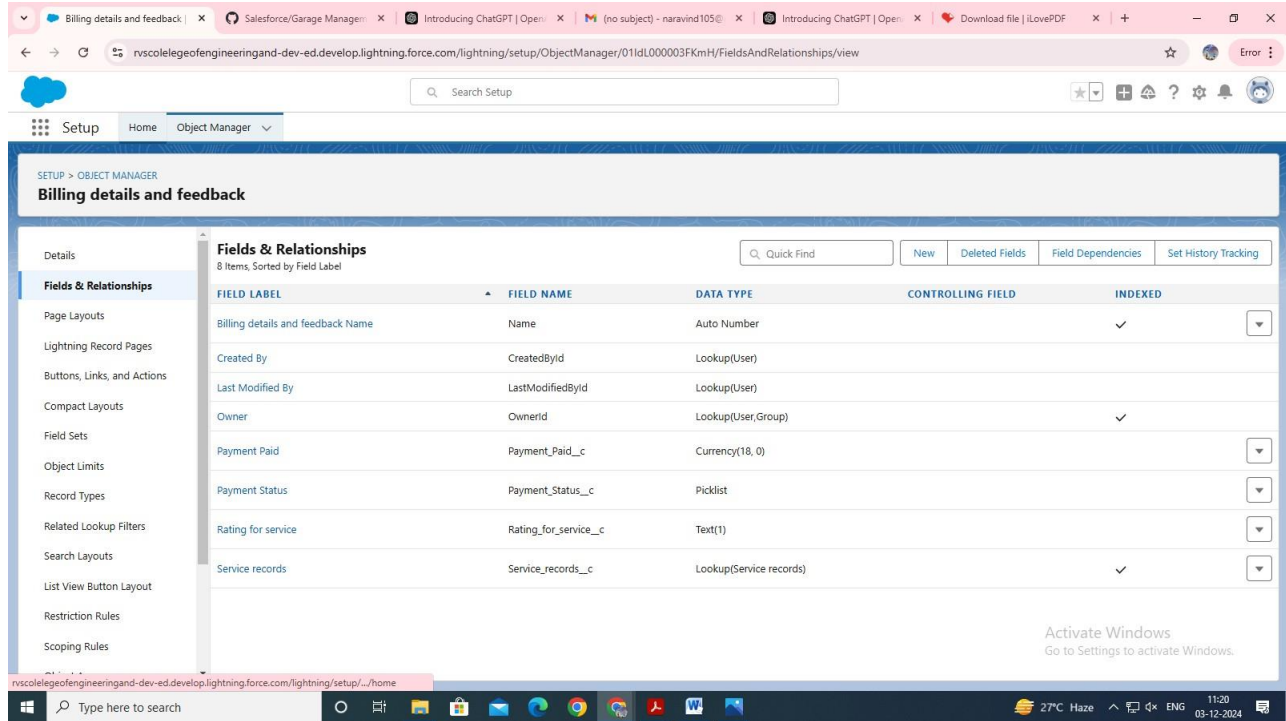
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment	Appointment__c	Lookup(Appointment)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Quality Check Status	Quality_Check_Status__c	Checkbox		
service date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

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Service Records



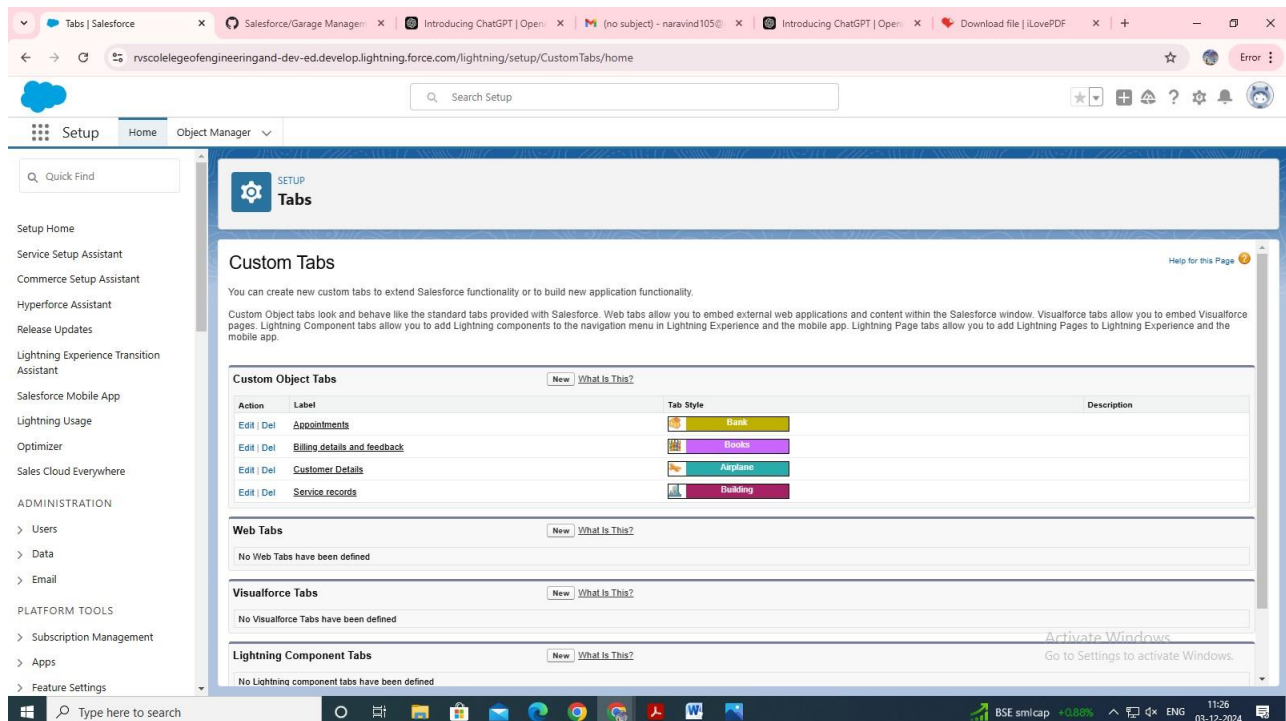
The screenshot shows the Salesforce Setup interface for the 'Billing details and feedback' object. The left sidebar contains a navigation menu with options like Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled 'Fields & Relationships' and displays a table of fields for the object.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Billing details and feedback Name	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User, Group)		✓
Payment Paid	Payment_Paid__c	Currency(18, 0)		
Payment Status	Payment_Status__c	Picklist		
Rating for service	Rating_for_service__c	Text(1)		
Service records	Service_records__c	Lookup(Service records)		✓

Billing details and feedback

2.Tabs:

Custom object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.



The screenshot shows the Salesforce Setup interface for the 'Custom Tabs' page. The left sidebar contains a navigation menu with options like Setup Home, Service Setup Assistant, Commerce Setup Assistant, Hyperforce Assistant, Release Updates, Lightning Experience Transition Assistant, Salesforce Mobile App, Lightning Usage, Optimizer, Sales Cloud Everywhere, ADMINISTRATION, and PLATFORM TOOLS. The main content area is titled 'Custom Tabs' and displays a table of custom object tabs.

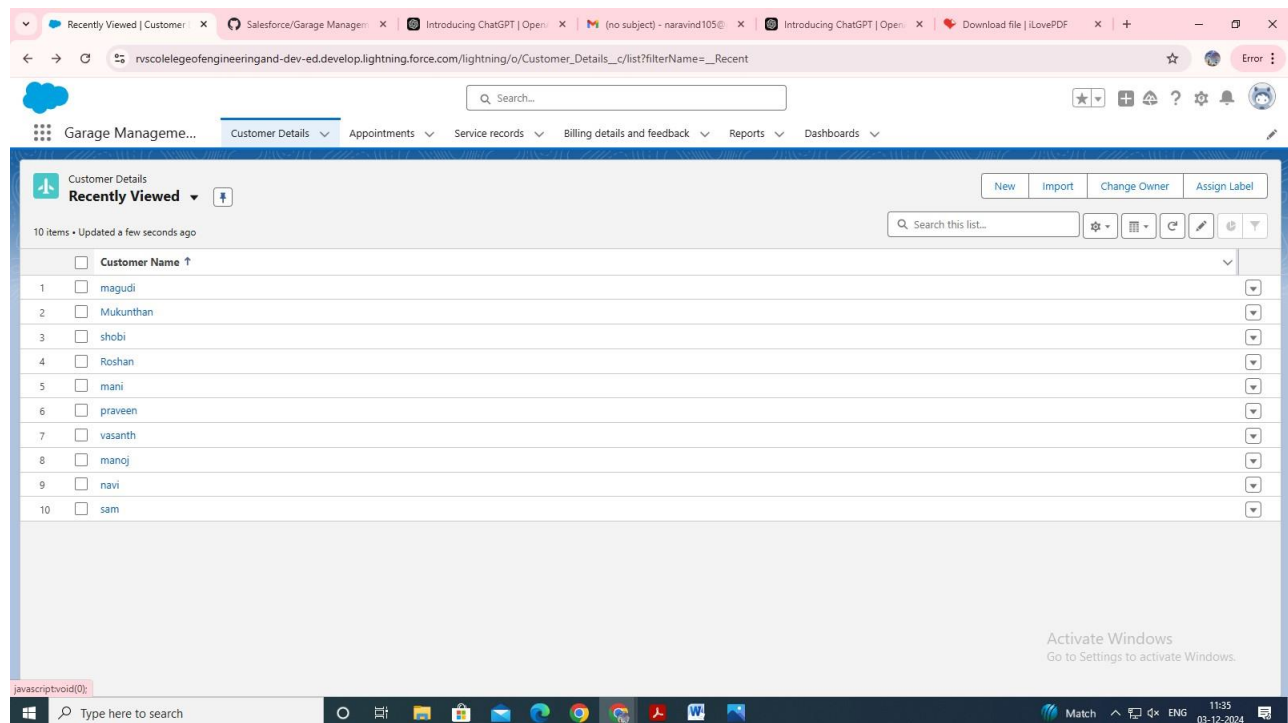
Action	Label	Tab Style	Description
Edit Del	Appointments	Blank	
Edit Del	Billing details and feedback	Blank	
Edit Del	Customer Details	Blank	
Edit Del	Service records	Blank	

Custom Tabs

3.The Lightning App:

An app is a collection of items that work together to serve a particular function. In Lightning Experience, Lightning apps give your users access to sets of objects, tabs, and other items all in one convenient bundle in the navigation bar. Lightning apps let you brand your apps with a custom colour and logo. You can even include a utility bar and Lightning page tabs in your Lightning app. Members of your org can work more efficiently by easily switching between apps.

In the GMS mode we will include the custom objects that we created, Customer details , Appointment , Service Records ,Billing and Feedback details.



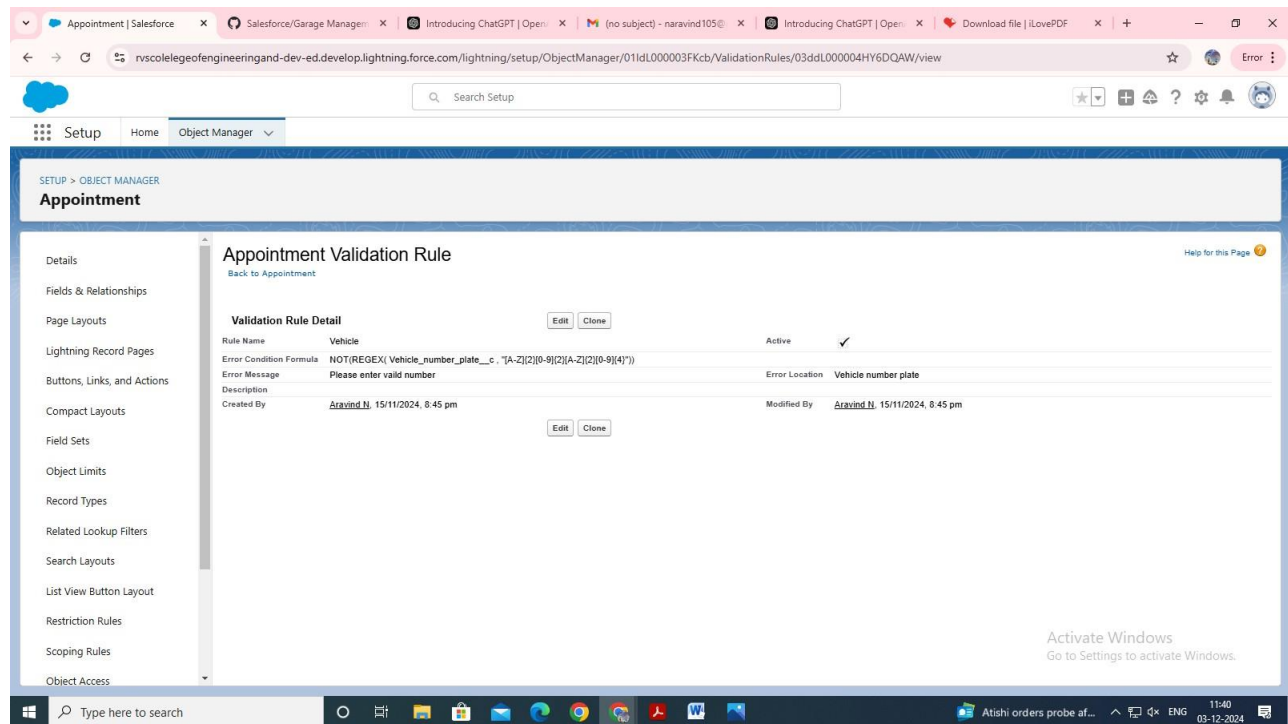
Lightning App

4.Validation Rule:

Validation rules are applied when a user tries to save a record and are used to check if the data meets specified criteria. If the criteria are not met, the validation rule triggers an error message and prevents the user from saving the record until the issues are resolved.

In the GMS model we use validation rule to check the number plate of the vehicle

Formula-NOT(REGEX(Vehicle_number_plate_c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}")).

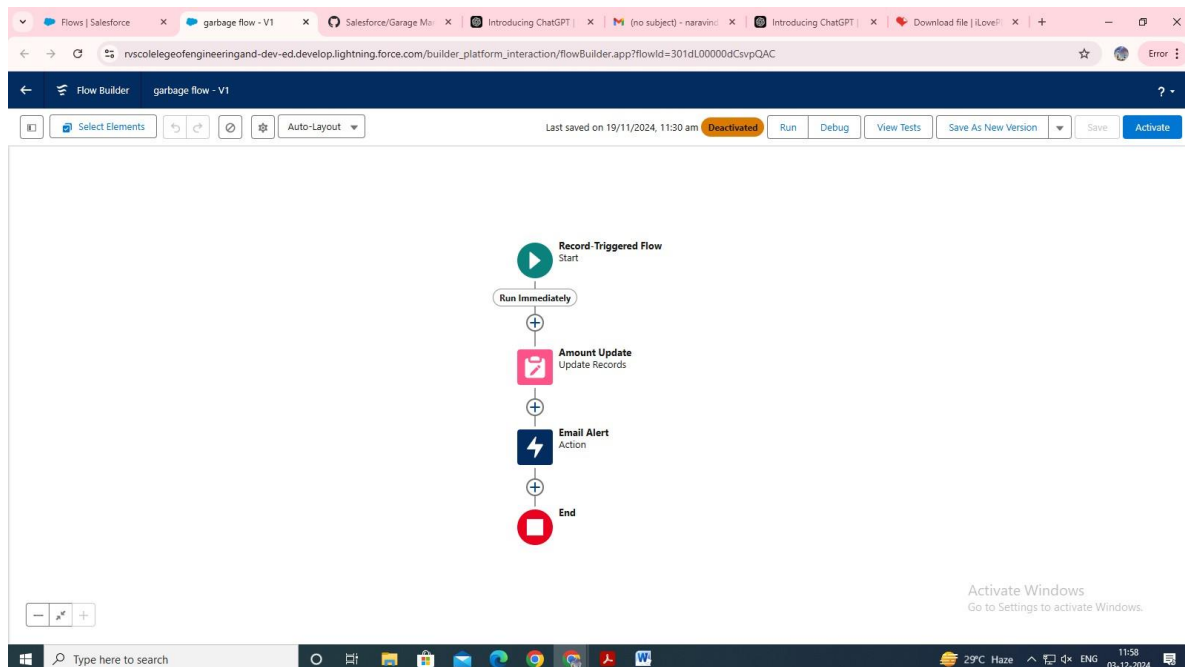


The screenshot shows the Salesforce Setup interface, specifically the Object Manager for the Appointment object. The Validation Rule Detail section is visible, showing the Rule Name as 'Vehicle', the Error Condition Formula as 'NOT(REGEX(Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))', and the Error Message as 'Please enter valid number'. The rule is active and was created by Aravind N. on 15/11/2024 at 8:45 pm.

Validation Rule for Vehicle number plate

5.Flows:

In Salesforce, a flow is a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps.



The screenshot shows the Salesforce Flow Builder interface for a Record-Triggered Flow. The flow starts with a 'Record-Triggered Flow Start' event, followed by a 'Run Immediately' step, an 'Amount Update' action, an 'Email Alert' action, and finally an 'End' step. The flow is currently deactivated and was last saved on 19/11/2024 at 11:30 am.

Flows are built using a visual interface and can be created without any coding knowledge.

4. Testing and Validation:

Testing and validation are critical phases in the development and deployment of the Garage Management System (GMS). This process ensures that the system meets the functional and non-functional requirements, performs reliably under various conditions, and provides a seamless experience for both users and customers. The testing phase involves various types of tests to ensure system reliability, security, and performance. Here's an overview of the testing and validation approach for the GMS.

1. Unit Testing:

Unit testing focuses on testing individual components or functions of the Garage Management System. It ensures that each part of the system, such as appointment creation, service record generation, or invoice generation, behaves as expected. Unit testing is usually performed by developers during the development phase to catch any early bugs.

- **Objective:** Verify that each function works independently as expected.
- **Tools :** Salesforce's built-in testing framework (**Apex tests**), Selenium (for UI testing).

Apex class:

An **Apex class** in Salesforce is used to implement custom logic and functionality in the GMS. Apex allows you to write back-end code to handle operations such as service appointment scheduling, job card creation, and invoice generation. Below is an example of an Apex class that can be used in the Garage Management System to automate certain tasks, such as creating a service record after an appointment is made.

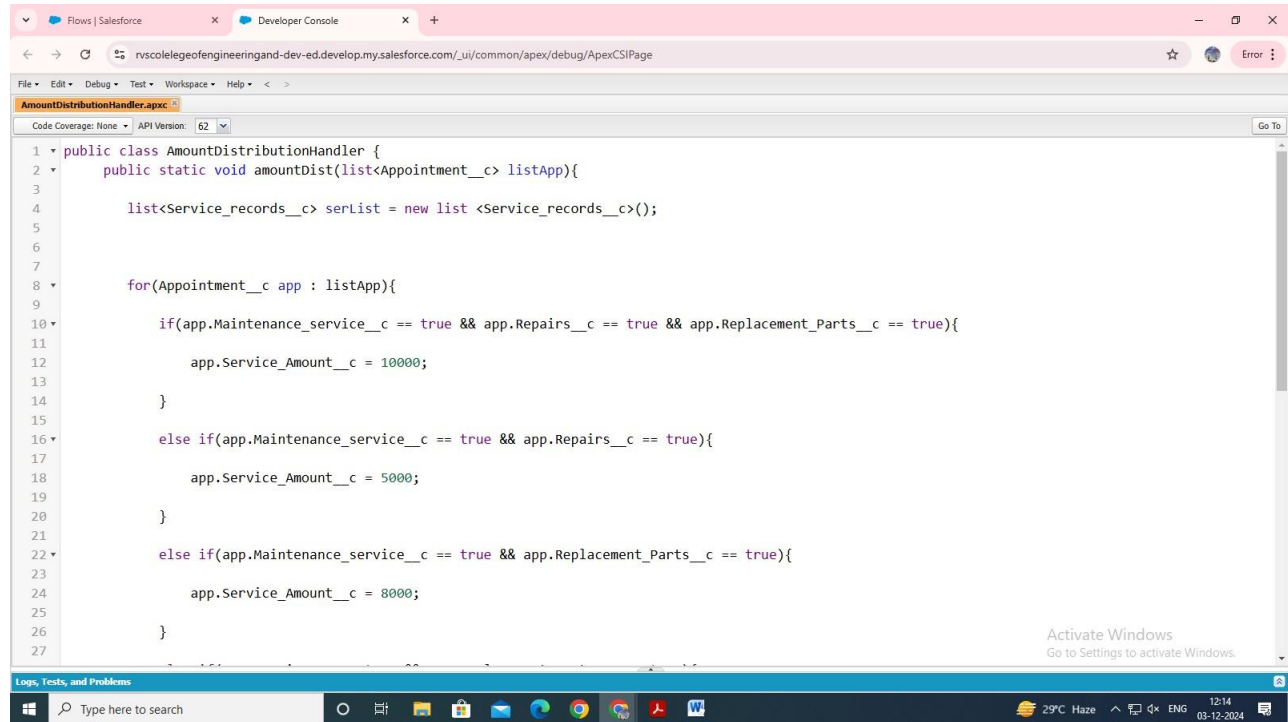
Code:

```
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;
            }

        }
    }
}
```



```

1 public class AmountDistributionHandler {
2     public static void amountDist(list<Appointment__c> listApp){
3
4         list<Service_records__c> serList = new list <Service_records__c>();
5
6
7
8         for(Appointment__c app : listApp){
9
10            if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){
11
12                app.Service_Amount__c = 10000;
13
14            }
15
16            else if(app.Maintenance_service__c == true && app.Repairs__c == true){
17
18                app.Service_Amount__c = 5000;
19
20            }
21
22            else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
23
24                app.Service_Amount__c = 8000;
25
26            }
27
28        }
29    }
30 }
  
```

Apex Trigger:

An **Apex Trigger** in Salesforce is used to automatically perform actions when certain events (such as insertions, updates, or deletions) occur on Salesforce objects. For the **GMS** an Apex trigger can be used to perform actions like creating a service record after an appointment is made or updating an appointment's status when a service is completed.

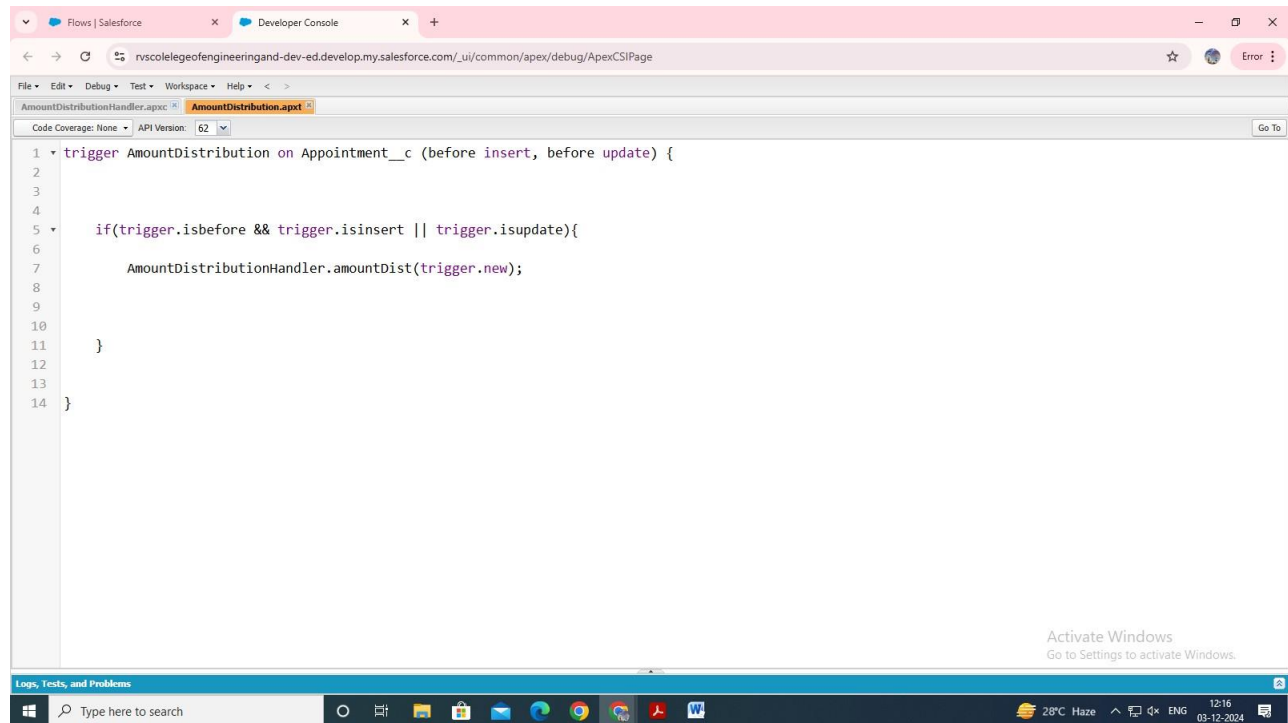
Code:

```

triggerAmountDistribution on Appointment__c (before insert, before update) {

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

}
  
```



```
1 trigger AmountDistribution on Appointment__c (before insert, before update) {
2
3
4
5     if(trigger.isbefore && trigger.isinsert || trigger.isupdate){
6
7         AmountDistributionHandler.amountDist(trigger.new);
8
9
10    }
11
12
13
14 }
```

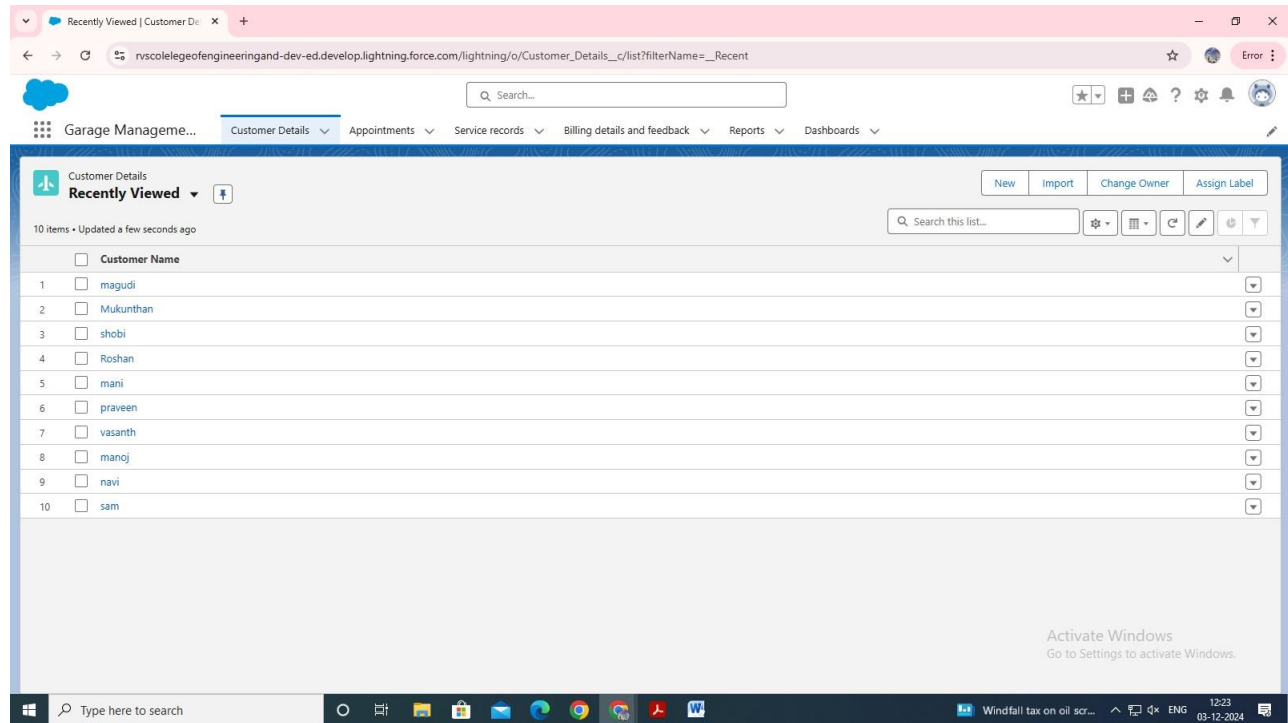
Reports:

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these reporting basics.

In the Garage Management System, custom reports are crucial for monitoring and analyzing various aspects of the business, such as appointments, service records, and billing details. To ensure that these reports provide meaningful insights, it is important to create at least 10 records for each custom report. For example, in a report tracking service appointments, we would generate a minimum of 10 unique appointments, including different customers, service types, appointment dates, and statuses.

Similarly, a service records report would require 10 distinct service records, each linked to an appointment, detailing the service performed, assigned technician, and the cost incurred. By generating a minimum of 10 records for each report, we ensure that the data displayed is comprehensive, realistic, and useful for decision-making, trend analysis, and performance evaluation.

These records will provide a sufficient data set to demonstrate the effectiveness of the system's reporting capabilities, allowing stakeholders to gain valuable insights and make informed decisions based on the system's operations.



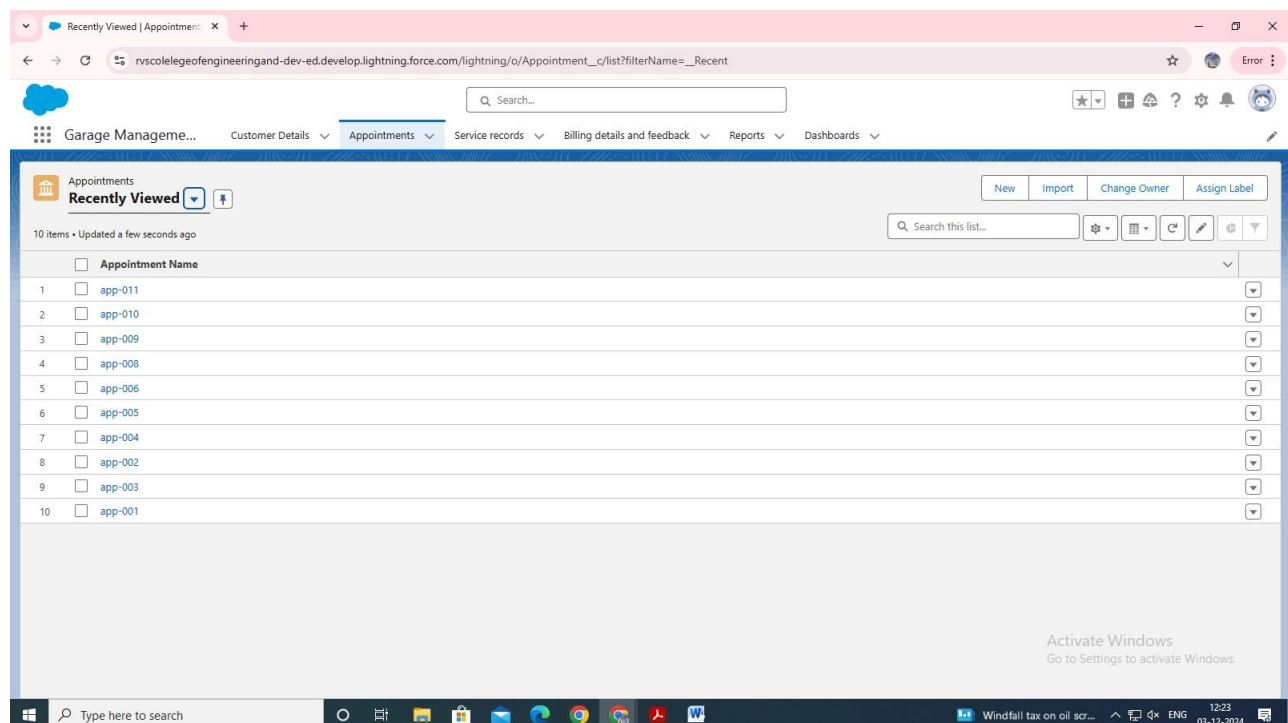
Customer Details

Recently Viewed

10 items • Updated a few seconds ago

	Customer Name	
1	magudi	
2	Mukunthan	
3	shobi	
4	Roshan	
5	mani	
6	praveen	
7	vasanth	
8	manoj	
9	navi	
10	sam	

Records for Customer details



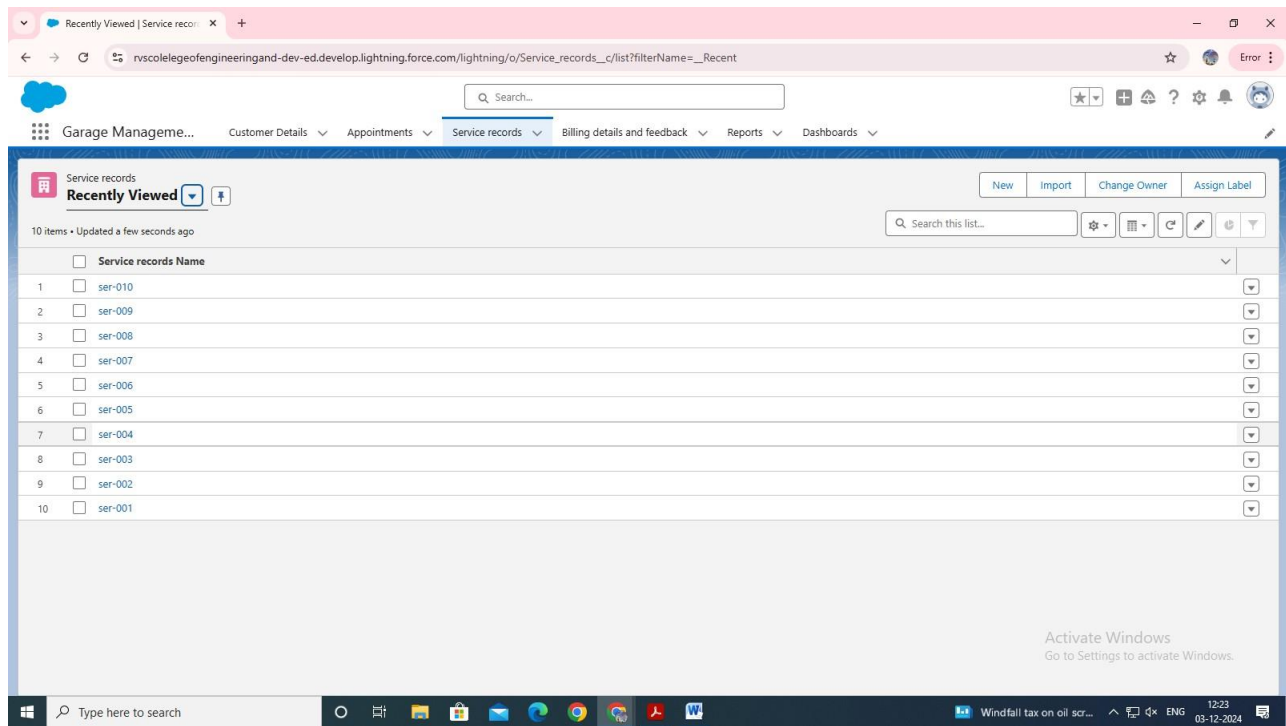
Appointments

Recently Viewed

10 items • Updated a few seconds ago

	Appointment Name	
1	app-011	
2	app-010	
3	app-009	
4	app-008	
5	app-006	
6	app-005	
7	app-004	
8	app-002	
9	app-003	
10	app-001	

Records for Appointments



Recently Viewed | Service reco... x +

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Search...

Garage Manageme... Customer Details v Appointments v Service records v Billing details and feedback v Reports v Dashboards v

Service records

Recently Viewed v

10 items • Updated a few seconds ago

Search this list...

New Import Change Owner Assign Label

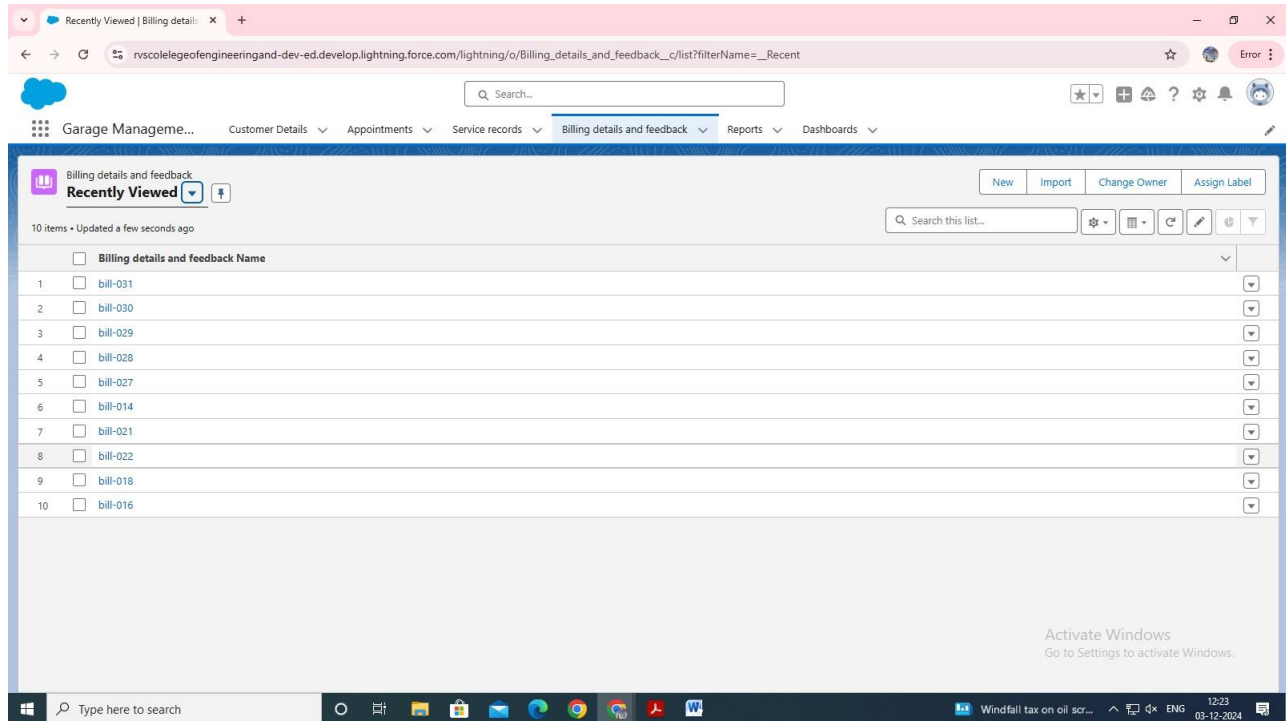
	<input type="checkbox"/> Service records Name	
1	<input type="checkbox"/> ser-010	
2	<input type="checkbox"/> ser-009	
3	<input type="checkbox"/> ser-008	
4	<input type="checkbox"/> ser-007	
5	<input type="checkbox"/> ser-006	
6	<input type="checkbox"/> ser-005	
7	<input type="checkbox"/> ser-004	
8	<input type="checkbox"/> ser-003	
9	<input type="checkbox"/> ser-002	
10	<input type="checkbox"/> ser-001	

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Records for Service Records



Recently Viewed | Billing detail... x +

nvscolegeofengineeringand-dev-ed.develop.lightning.force.com/lightning/o/Billing_details_and_feedback__c/list?filterName=__Recent

Search...

Garage Manageme... Customer Details v Appointments v Service records v Billing details and feedback v Reports v Dashboards v

Billing details and feedback

Recently Viewed v

10 items • Updated a few seconds ago

Search this list...

New Import Change Owner Assign Label

	<input type="checkbox"/> Billing details and feedback Name	
1	<input type="checkbox"/> bill-031	
2	<input type="checkbox"/> bill-030	
3	<input type="checkbox"/> bill-029	
4	<input type="checkbox"/> bill-028	
5	<input type="checkbox"/> bill-027	
6	<input type="checkbox"/> bill-014	
7	<input type="checkbox"/> bill-021	
8	<input type="checkbox"/> bill-022	
9	<input type="checkbox"/> bill-018	
10	<input type="checkbox"/> bill-016	

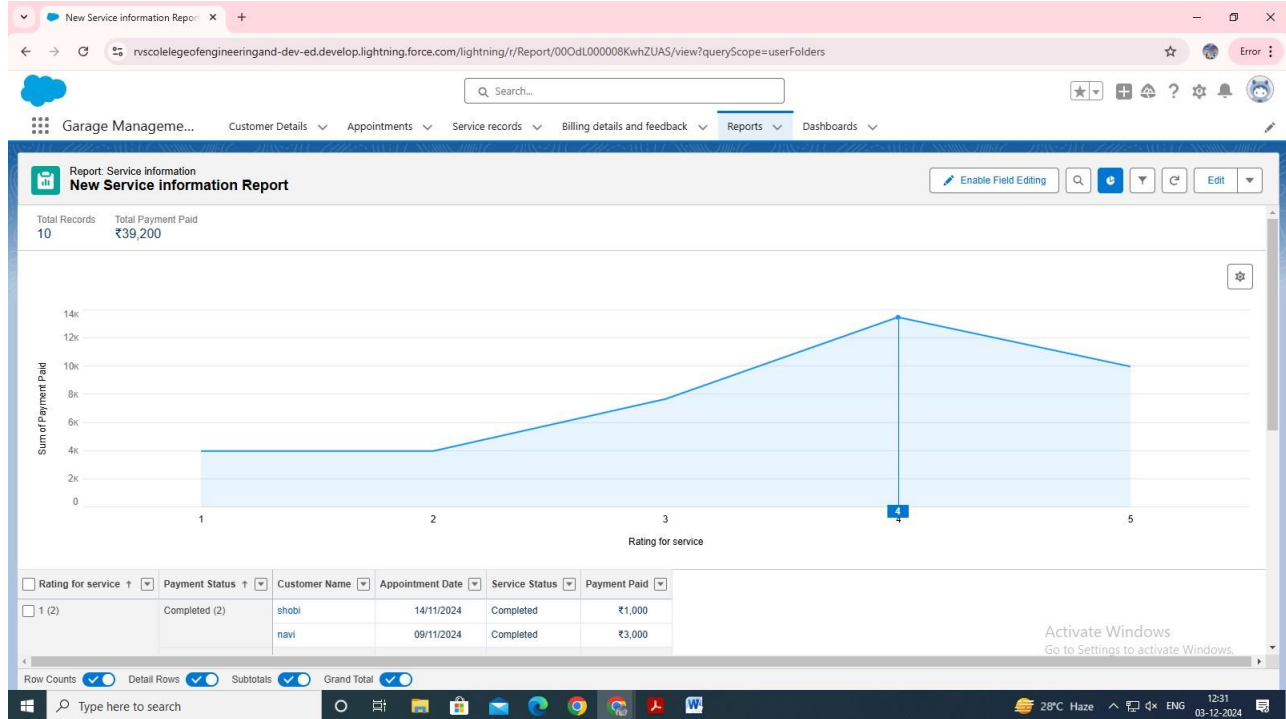
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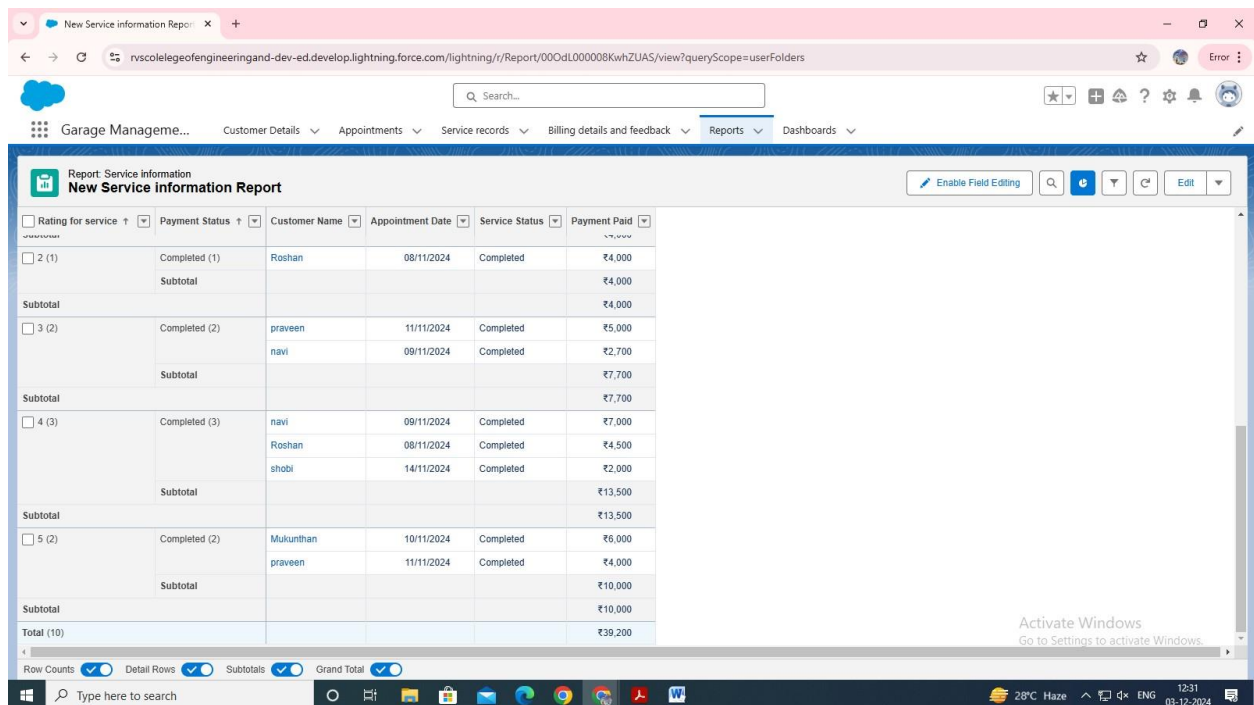
Windfall tax on oil scr... ENG 12:23 03-12-2024

Records for Billing details and Feedback

After creating the records on each custom fields, we can start by generating the reports of the details provided by the customer.



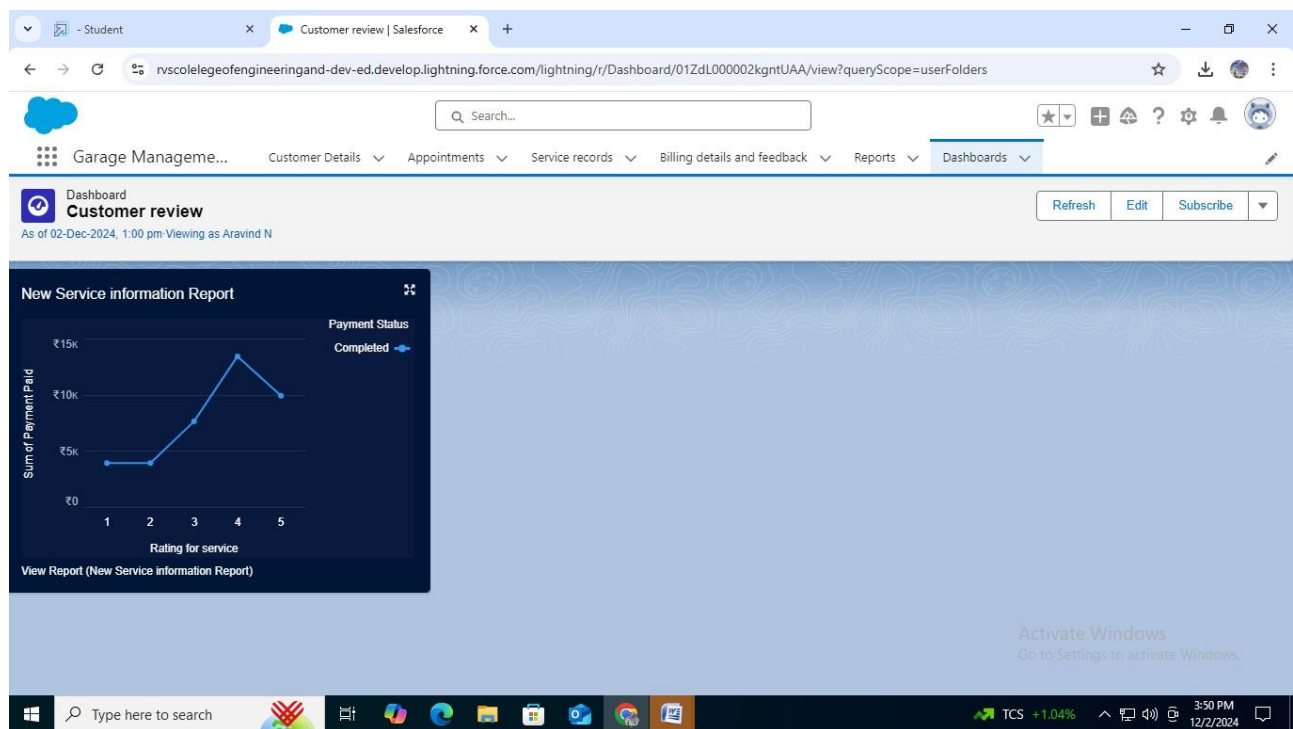
Report in Line Chart



The screenshot shows a Salesforce report titled "New Service Information Report". The report displays a table of service records. The table has columns for Rating for service, Payment Status, Customer Name, Appointment Date, Service Status, and Payment Paid.

Rating for service	Payment Status	Customer Name	Appointment Date	Service Status	Payment Paid
2 (1)	Completed (1)	Roshan	08/11/2024	Completed	₹4,000
	Subtotal				₹4,000
	Subtotal				₹4,000
3 (2)	Completed (2)	praveen	11/11/2024	Completed	₹5,000
		navi	09/11/2024	Completed	₹2,700
	Subtotal				₹7,700
	Subtotal				₹7,700
4 (3)	Completed (3)	navi	09/11/2024	Completed	₹7,000
		Roshan	08/11/2024	Completed	₹4,500
		shobi	14/11/2024	Completed	₹2,000
	Subtotal				₹13,500
	Subtotal				₹13,500
5 (2)	Completed (2)	Mukunthan	10/11/2024	Completed	₹6,000
		praveen	11/11/2024	Completed	₹4,000
	Subtotal				₹10,000
	Subtotal				₹10,000
	Total (10)				₹39,200

Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports. Use dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics. After creating the reports we can start generating the dashboard ,it is mainly use the display the details in the graph manner (Line graph).



Dash Board

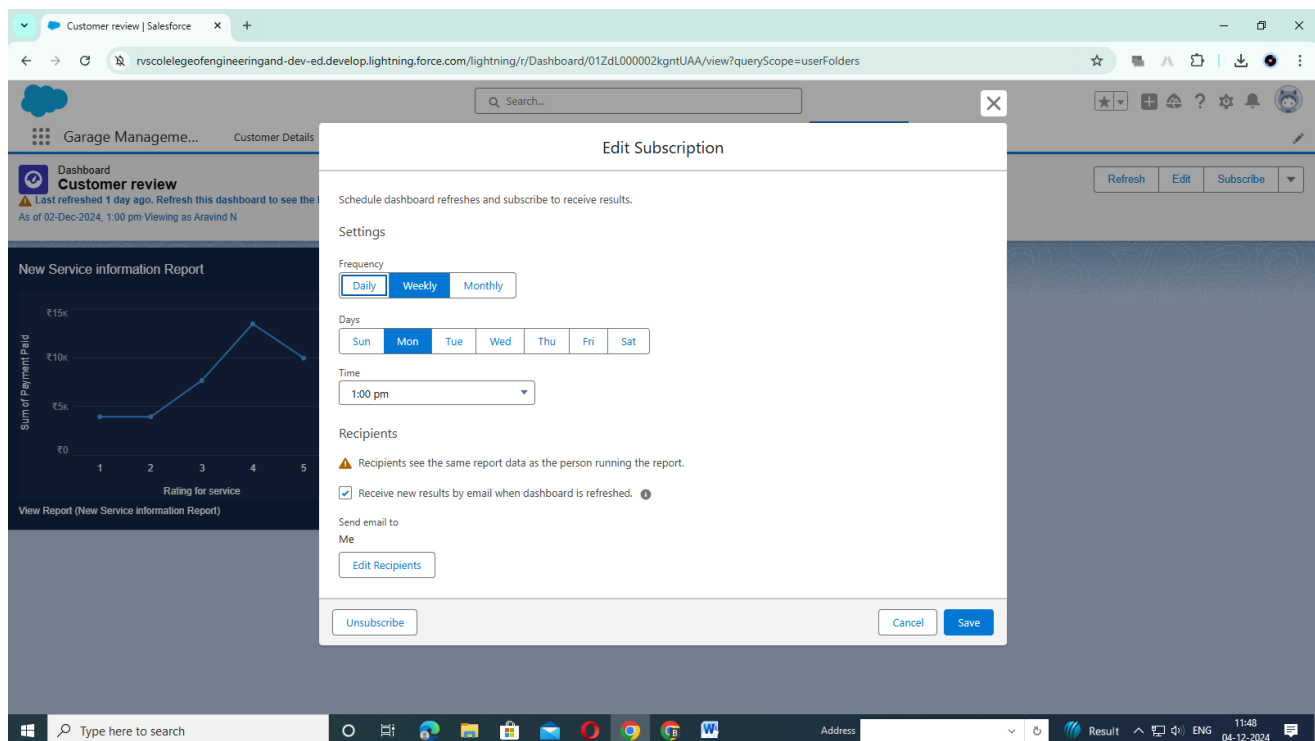
Subscription:

The **Garage Management System (GMS)** is designed to streamline and enhance the management of vehicle repairs, maintenance schedules, and customer interactions. By introducing a **subscription model** to the system, garages and service centers can ensure that their reports, records, and customer feedback are automatically refreshed and updated each week. Every Monday, the system will automatically refresh data and accept new reports from

mechanics, customers, or service teams, making the workflow more efficient and reducing manual overhead.

Automatic Weekly Refresh:

- Every Monday, the system automatically refreshes the data, ensuring the latest records, maintenance logs, and customer feedback are updated.
- This helps ensure that technicians and service managers work with the most current and relevant information at the start of the week.



5. Key Scenarios Addressed by Salesforce

When implementing a **Garage Management System** using Salesforce, several key scenarios can be addressed through Salesforce's features and tools. Here are five important scenarios that Salesforce can help manage:

1. **Customer Vehicle Management:**

- Salesforce can track and manage detailed information about customers' vehicles, such as make, model, year, VIN, service history, and repair status. This allows easy retrieval of vehicle data when customers come for services or repairs, ensuring a smooth customer experience.

2. **Service Appointment Scheduling:**

- Salesforce can integrate with a scheduling system or leverage custom Lightning components to allow customers to book service appointments online. It can also automatically assign technicians based on availability, expertise, and workload, ensuring optimal utilization of resources.

3. **Parts Inventory Management:**

- A key part of the Garage Management System is managing inventory for vehicle parts. Salesforce's **Sales Cloud** or **Service Cloud** can track parts inventory levels, generate automatic reorder alerts when stock is low, and facilitate the management of suppliers and purchase orders.

4. **Billing and Invoicing:**

- Salesforce can handle billing processes, generating invoices for services rendered or parts purchased. Integration with **Salesforce Billing** or custom processes can automate the creation and sending of invoices, track payments, and follow up on overdue accounts, ensuring efficient financial operations.

5. **Customer Communication and Engagement:**

- Salesforce can be used to maintain strong customer relationships by automatically sending service reminders, promotions, and maintenance tips via email, SMS, or push notifications. Salesforce's **Marketing Cloud** or **Service Cloud** can manage customer communication, track interactions, and follow up on service appointments.

These scenarios leverage Salesforce's capabilities to ensure the garage management process is streamlined, efficient, and customer-focused.

6. Conclusion

Implementing a **Garage Management System** using Salesforce offers a comprehensive solution that enhances operational efficiency and customer satisfaction. By leveraging Salesforce's robust features such as customer vehicle management, appointment scheduling, parts inventory tracking, billing automation, and customer engagement tools, the system streamlines day-to-day operations. This ensures better resource allocation, timely service delivery, and improved communication with customers, ultimately driving business growth and fostering long-term customer loyalty. Salesforce's scalability and customization also allow the system to evolve with the garage's needs, making it a future-proof investment.