GARAGE MANAGEMENT SYSTEM

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INTRODUCTION

Project Overview

1.INTRODUCTION

1.1 Project Garage Management System

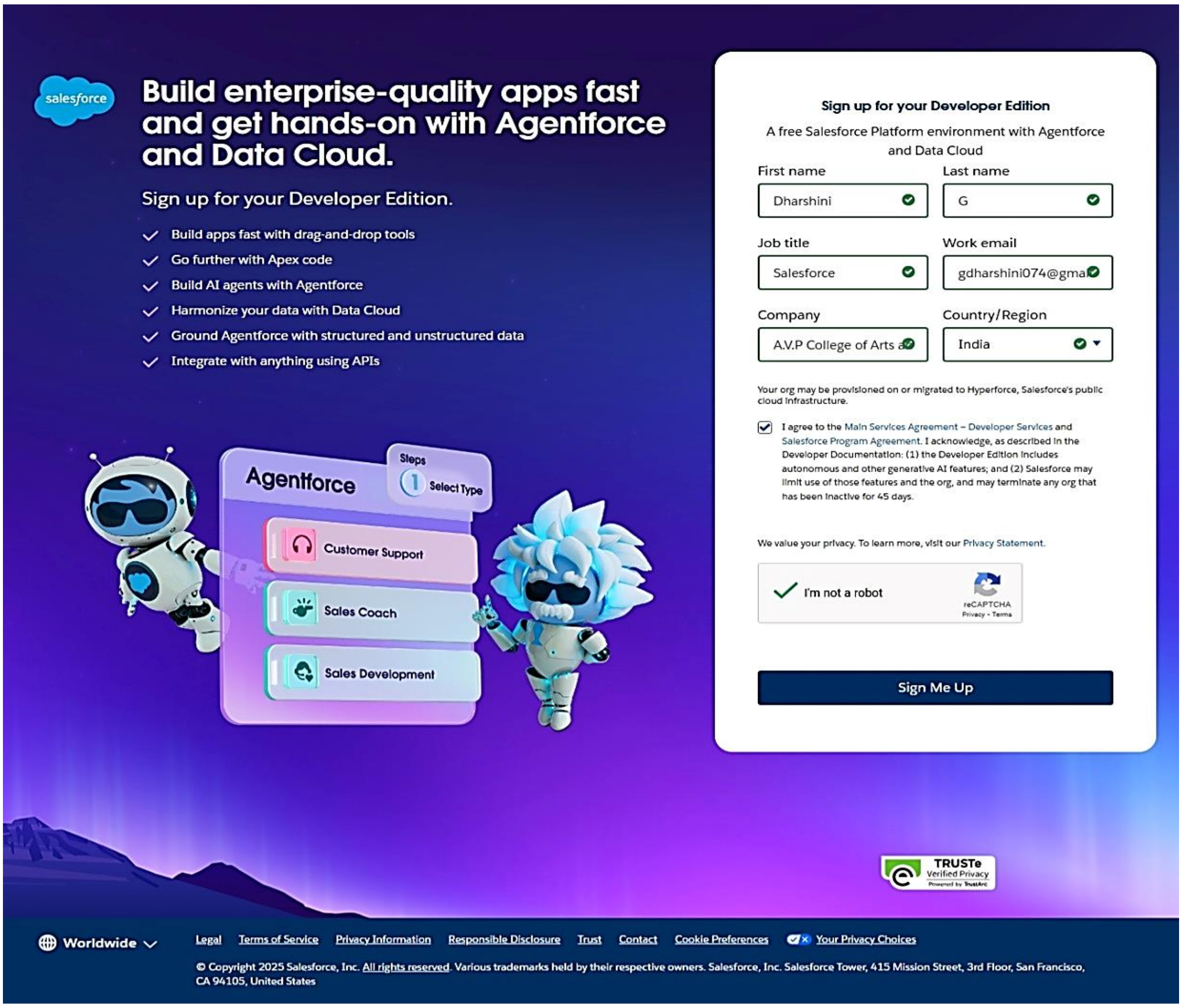
The Garage Management System (GMS) is a software tool designed to improve the efficiency of automotive repair shops. It manage customer details, service records, billing, and job tracking in a structured way. By reducing manual work and errors, it saves time and increases productivity. With its user-friendly interface, GMS ensures better service quality and customer satisfaction

DEVELOPMENT PHASE

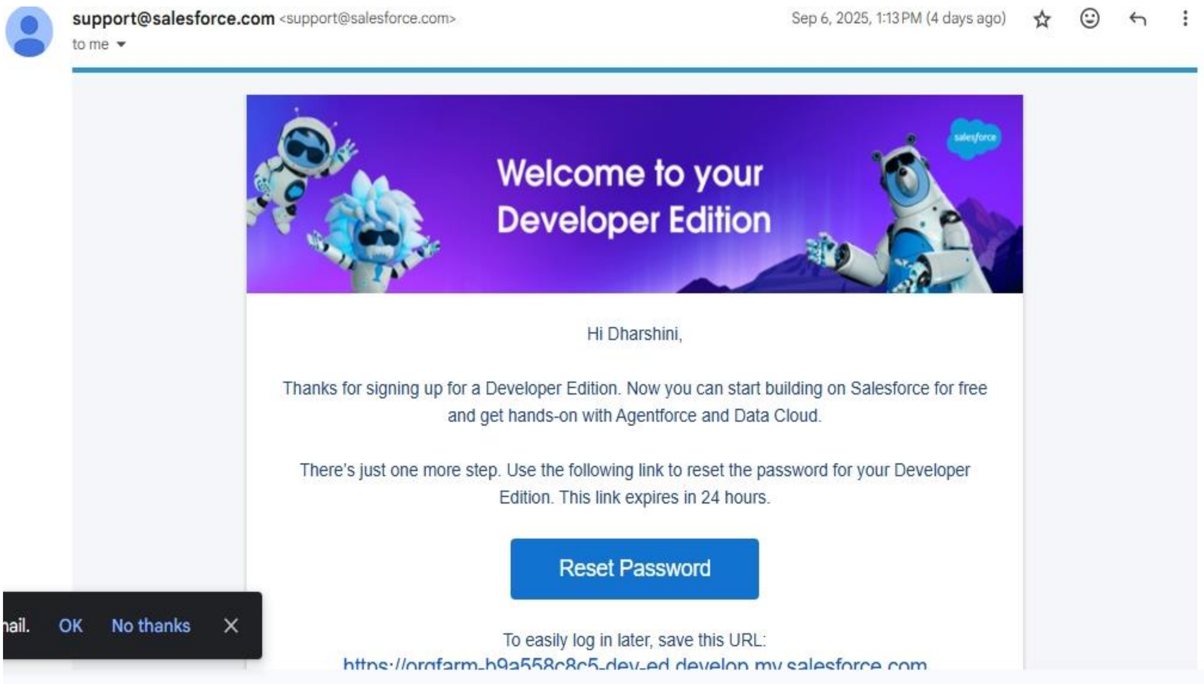
Creating Developer Account:

Creating a developer org in Salesforce

By using this URL https://developer.salesforce.com/signup



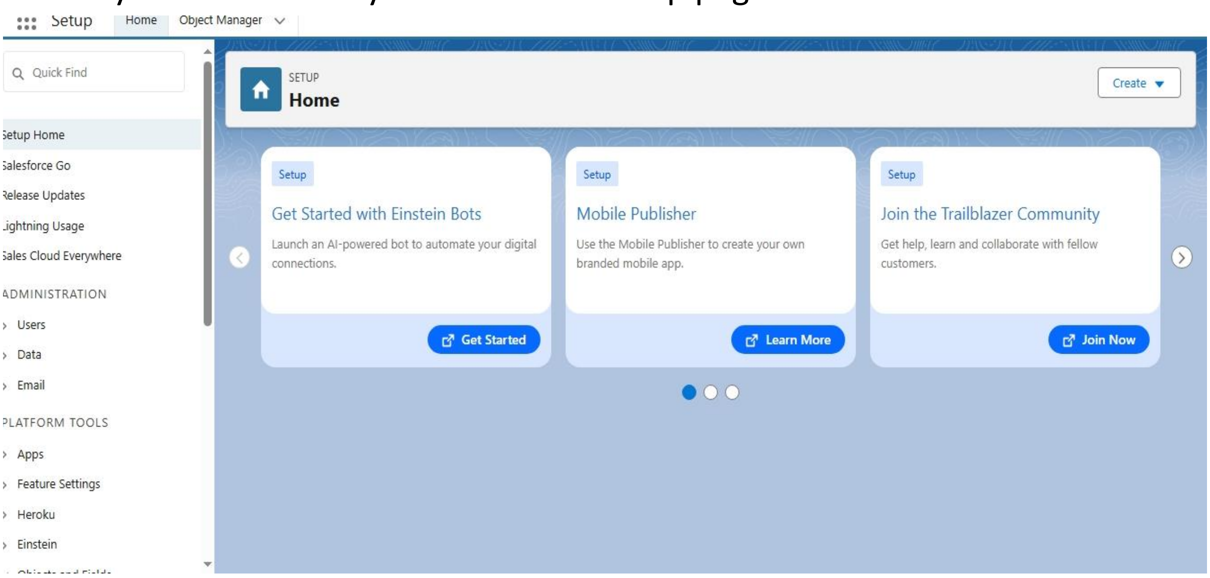
1. Give the details for requirement fields
2. Then click the "Sign me up"



3.Click on reset password

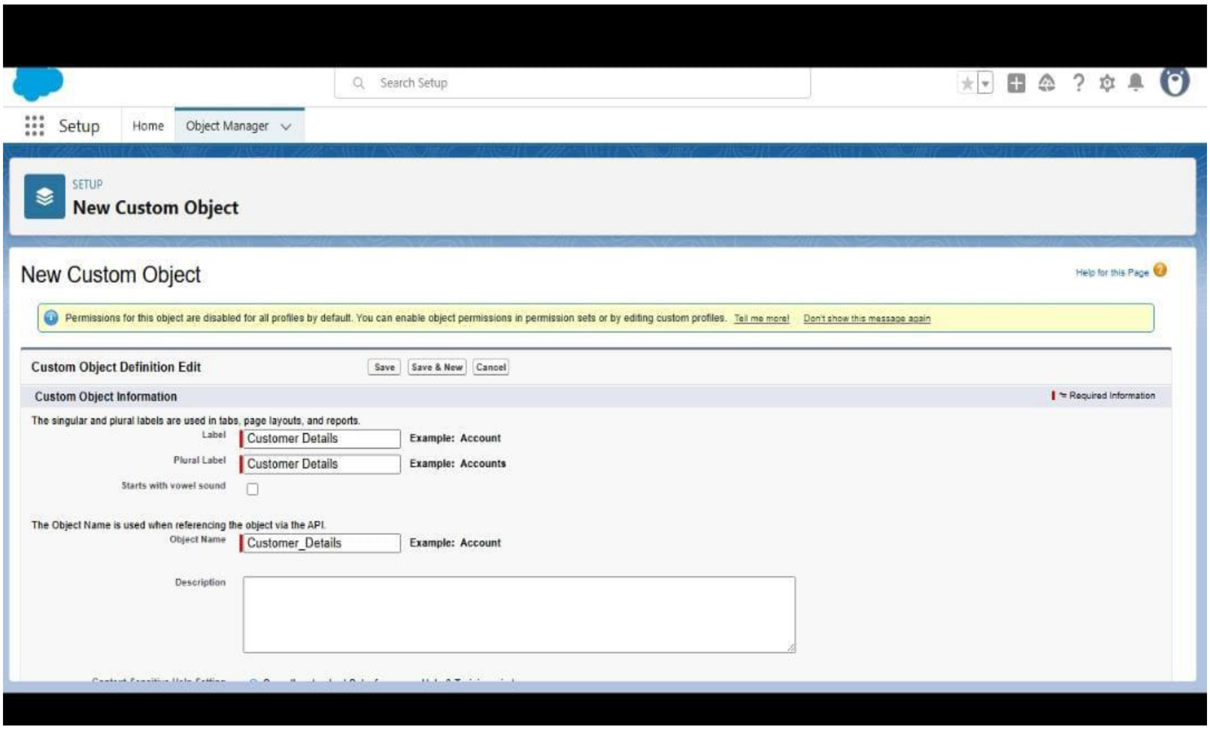
4.Give a password and answer the security question and click on change password

5.Then you will redirect your salesforce setup page



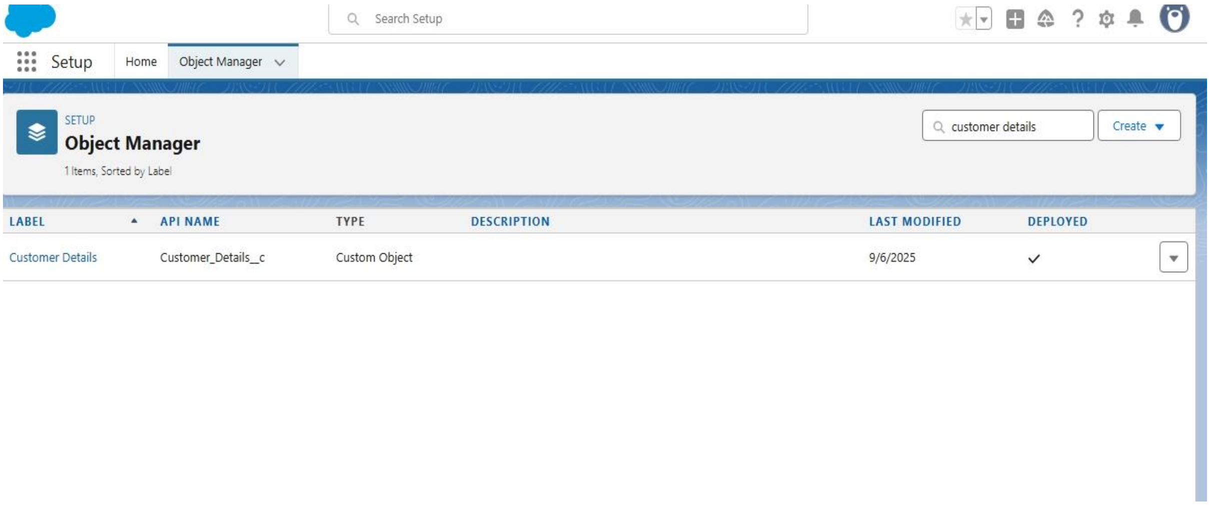
Create the objects:

- Create the customer detail object



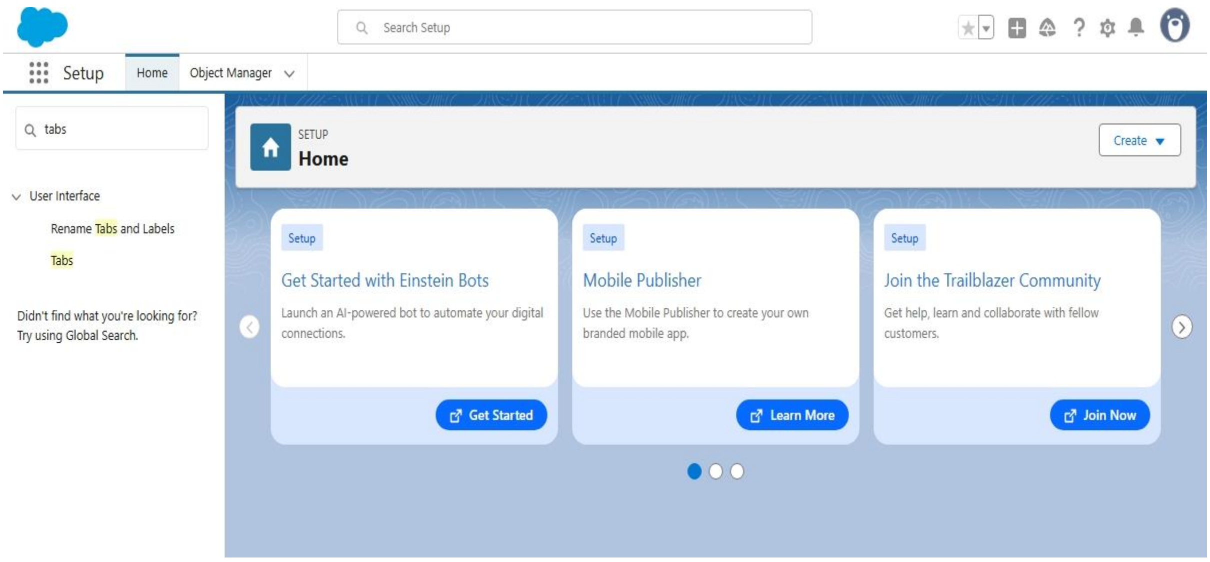
- From the setup page >> click on object manager>>click on create>>click on custom object
- Enter the label name >> Customer Details
  Plural label name >> Customer Details
  Enter Record Name Label and Format
  Record Name >> Customer Name
  Data Type >> Text
  Click on Allow reports and Track Field History,
  Allow search >> Save.

- You will see your created object in object manager



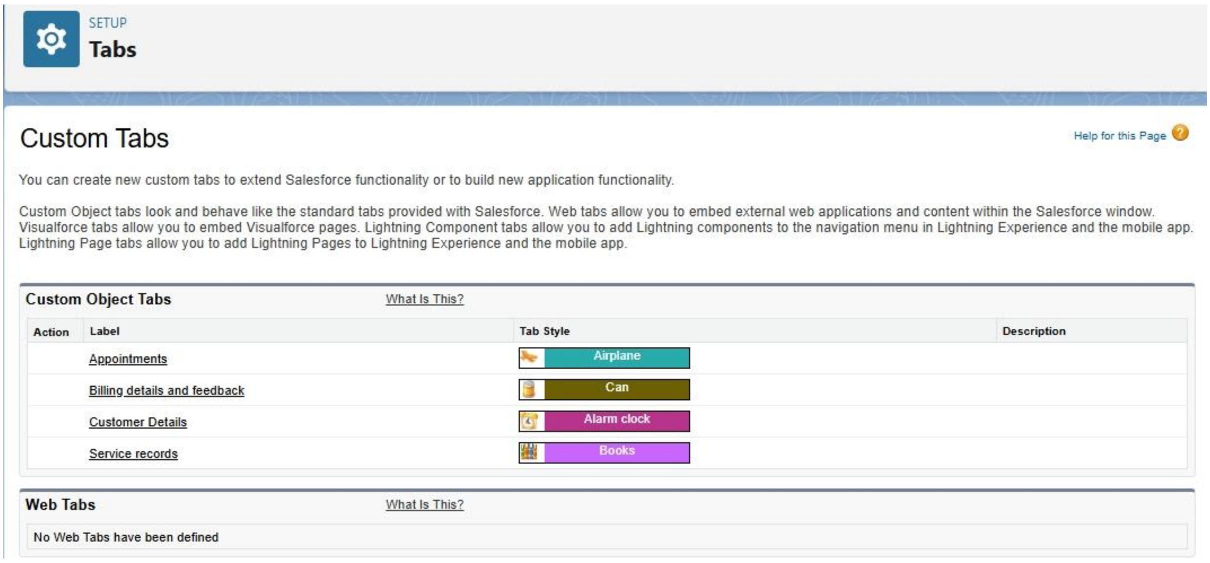
- Follow the same procedure to create the objects named Appointment, Service records and Billing details and feedback.

Create the Tabs :



- Type Tabs in Quick Find bar >> click on tabs >> New (under custom object tab)
- Select Object(Customer Details) >> Select the tab style >> Next (Add to profiles page) keep it as default >> Next (Add to Custom App) uncheck the include tab .

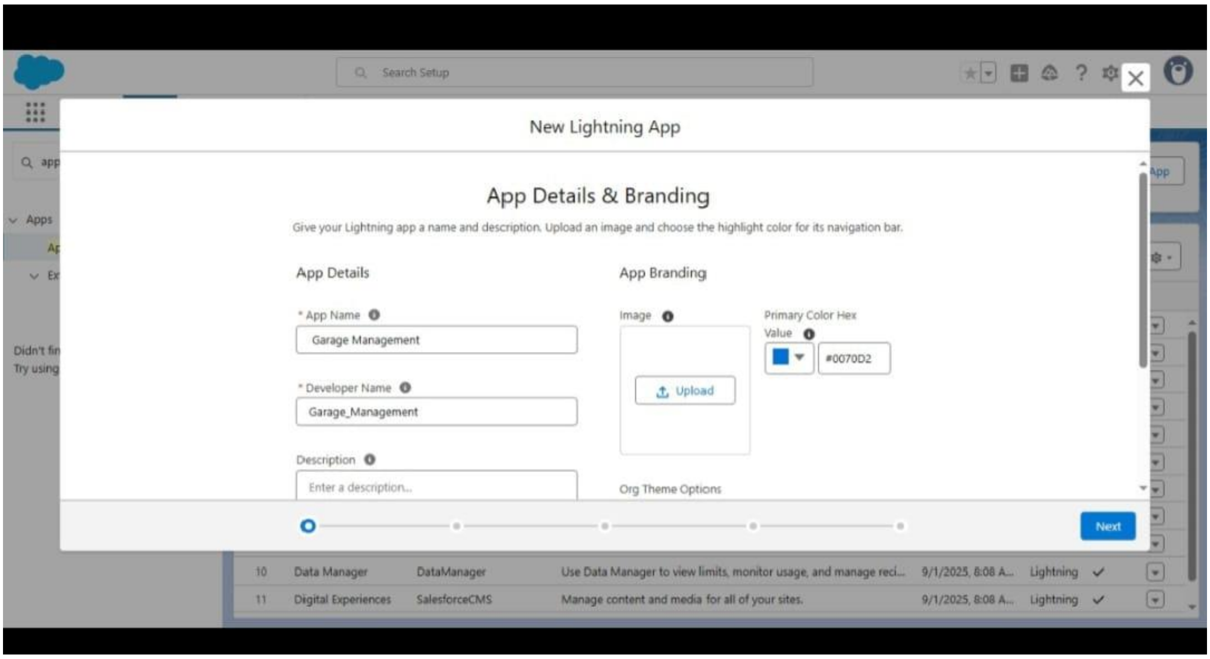
- Make sure that the Append tab to users' existing personal customizations is checked.
- Click save



- Now create the Tabs for the remaining Objects, they are " Appointments, Service records,Billing details and feedback".
- Follow the same steps as mentioned in Activity -1

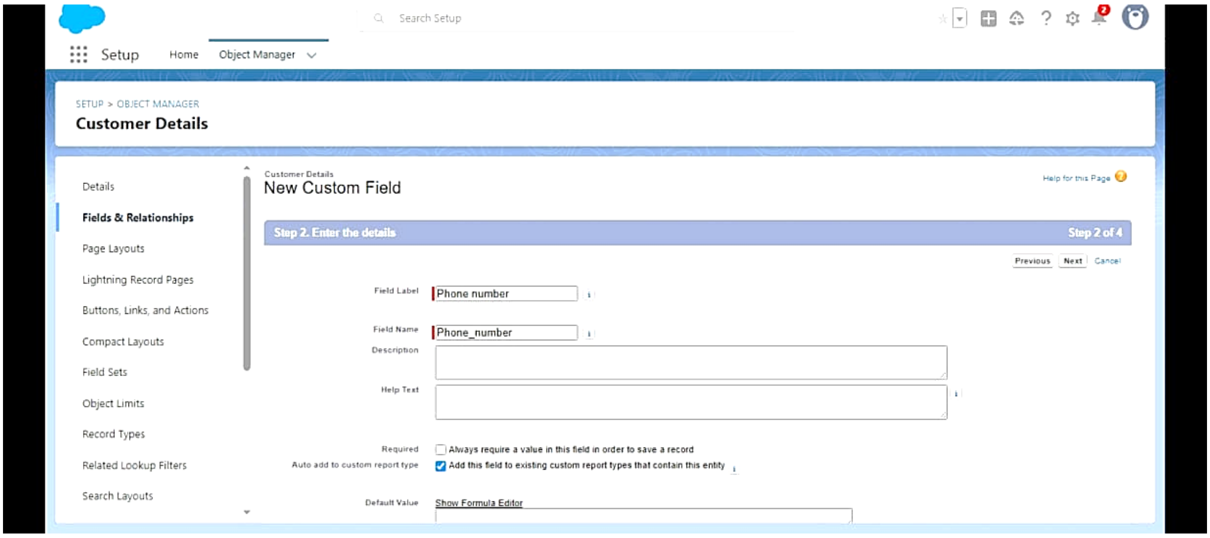
Create the Lightning app

- Go to setup page >> search "app manager" in quick find >> select "app manager" >> click on New lightning App.
- Fill the app name in app details as Garage Management
- Application >> Next >> (App option page) keep it as default >> Next >> (Utility Items) keep it as default >> Next.



- Then add the navigations items

Create the Fields :

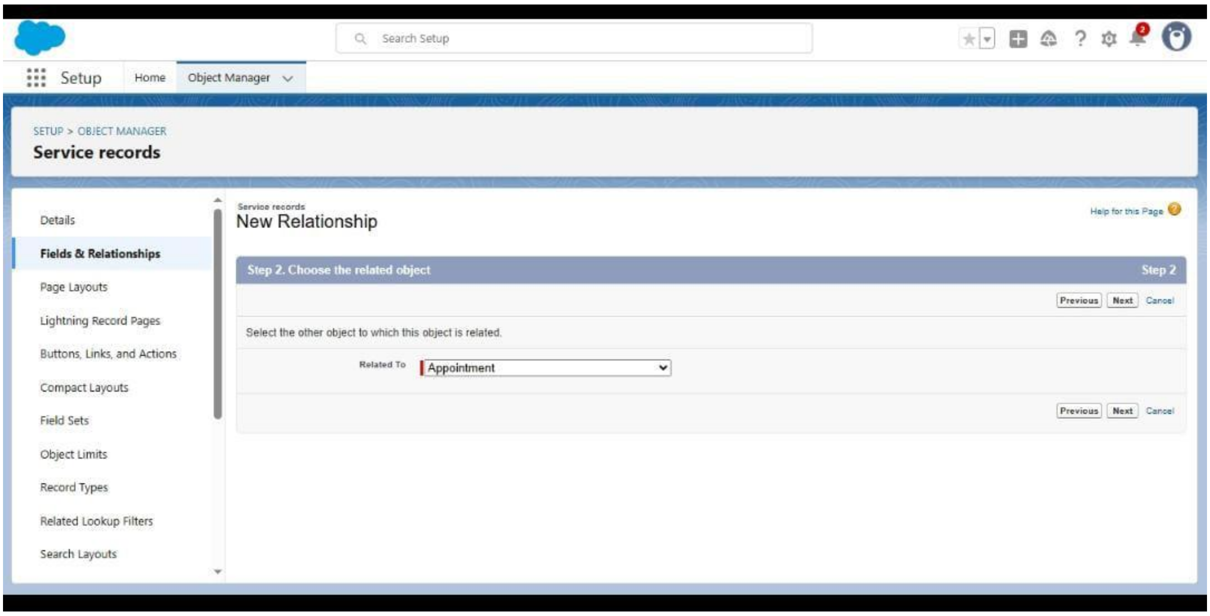


- click on Object Manager >> type object name(Customer Details) in search bar >> click on the object.
- Click on Field & Relationships>>New
- Select the data type as "Phone"

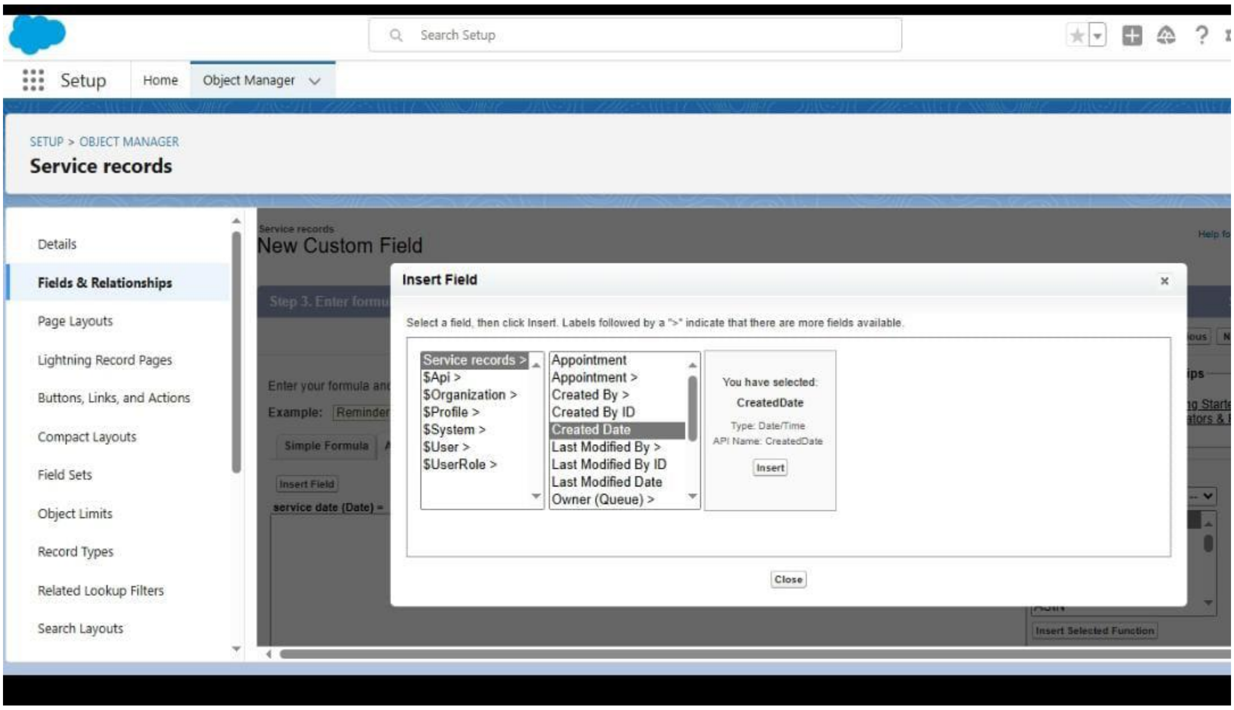
•Field Label: Phone number

- Field Name : gets auto generated then Click on Next >> Next >>save & new

- Same like as create the object named “Gmail”
- Then Create the Lookup Field on Service records Object
- Select “Look-up relationship” as data type and click Next
- Select the related object “ Appointment ” and click next

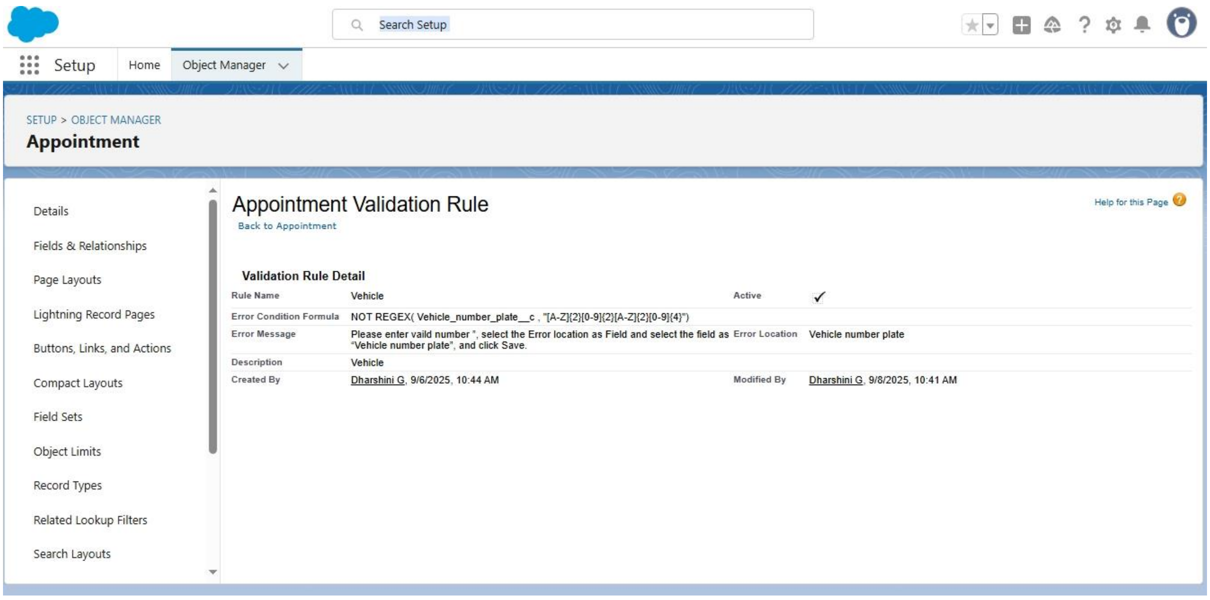


- Make it a required field so click on Required**.**
- Then create the Checkbox Field, date fields, currency fields, text fields, picklist fields and formula field for service records object

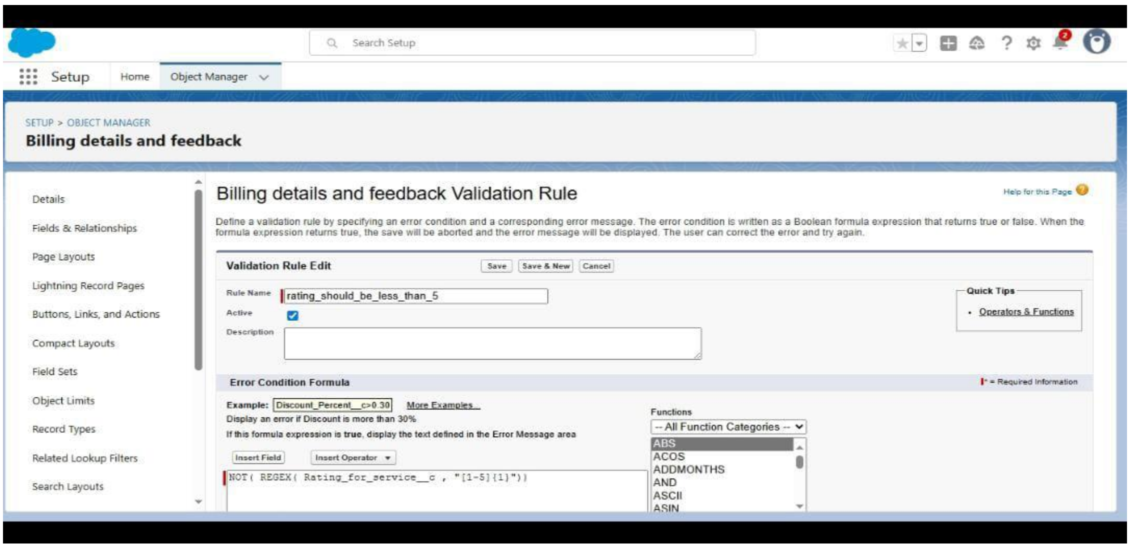


Create a Validation Rule :

- In Appointment object click the validation rules
- Enter the Rule name as “ Vehicle ”.
- Insert the Error Condition Formula as : - NOT(REGEX(Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))



- Same as To create a validation rule to an Billing details and feedback Object
- Enter the Rule name as “ rating_should_be_less_than_5”.
- Insert the Error Condition Formula as : NOT(REGEX(Rating_for_service__c , "[1-5]{1}"))
- Click save.

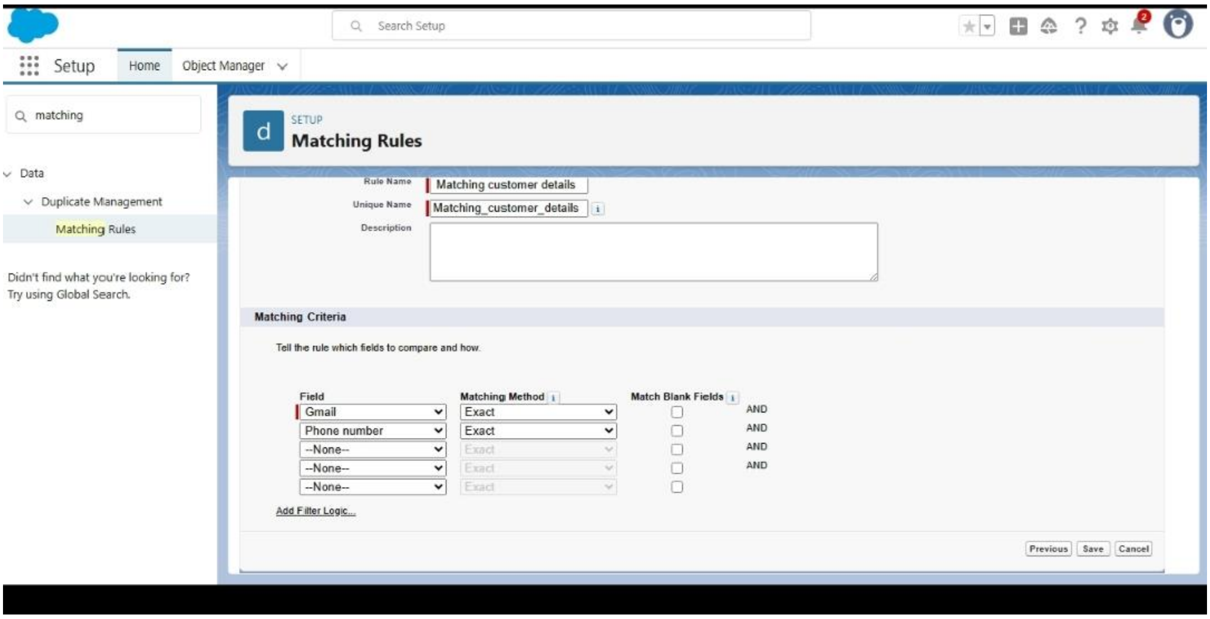


Create a Duplicate rules :

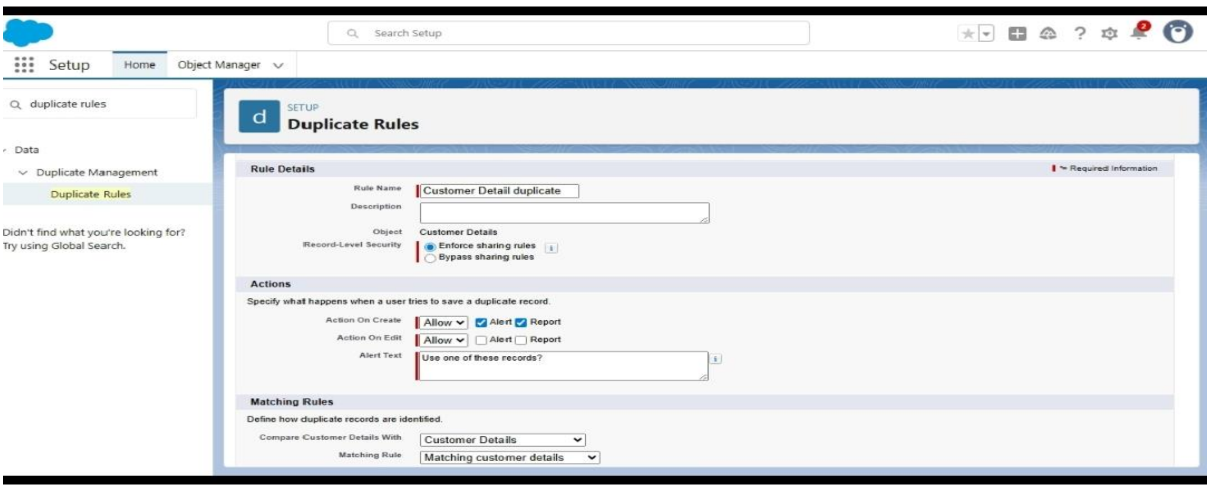
- In Quick find box search for Matching rule.
- Give the Rule name : Matching customer details
- Define the match criteria as

  Field 1.Gmail

  2.Phone number
- Click save
- Then click on the Activation



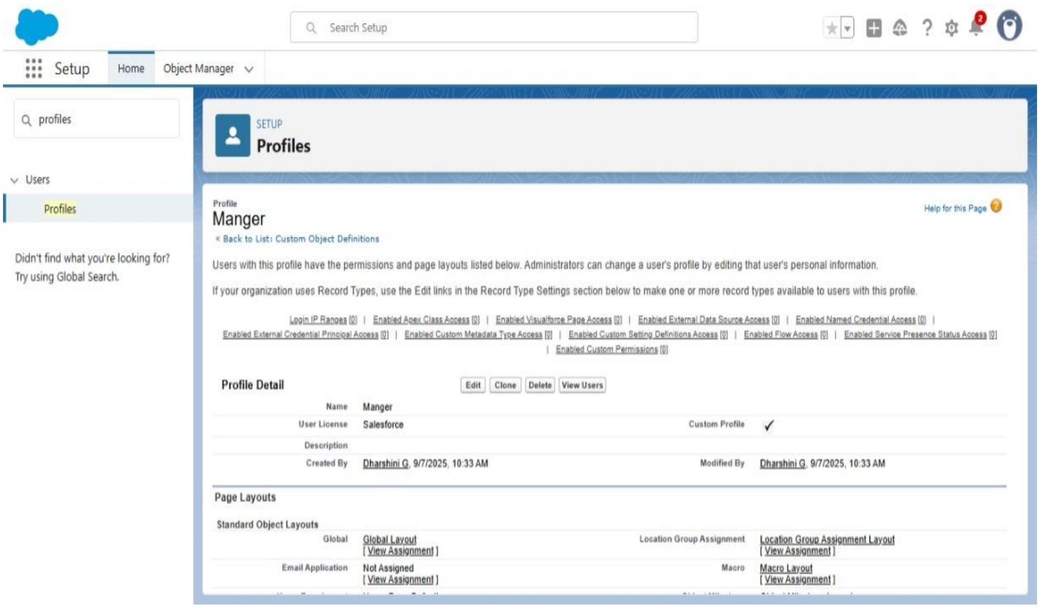
- Now create a Duplicate rule for Customer details object



Manager profile

To create a new profile

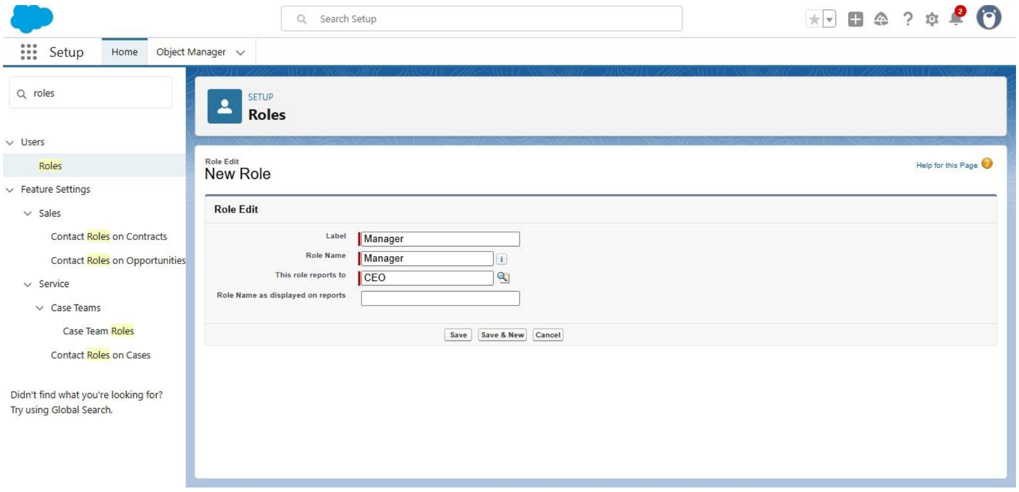
- Go to setup >> type profiles in quick find box >> click on profiles >> clone the desired profile (Standard User) >> enter profile name (Manager) >> Save.
- While still on the profile page, then click Edit.



- Scroll down to Custom Object Permissions and Give access permissions for Appointments,Billing details and feedback , service records and customer details object.
- Then create a sales person profile like as Manager profile.

Create Manager Role

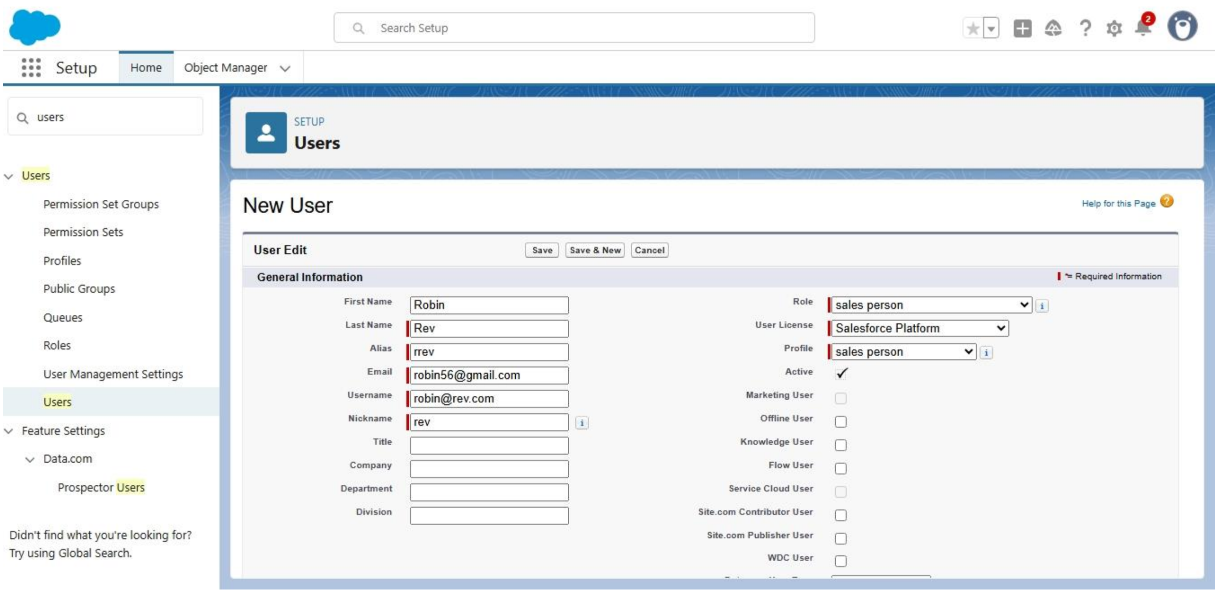
- In quick find >> Search for Roles >> click on set up roles.
- Click on Expand All and click on add role under whom this role works.
- Give Label as “Manager” and Role name gets auto populated. Then click on Save.



- Create the another rule under the manager then give the lable name as “sales person” and click save

Create the User :

- Go to setup >> type users in quick find box >> select users >> click New user.
- Fill the fields

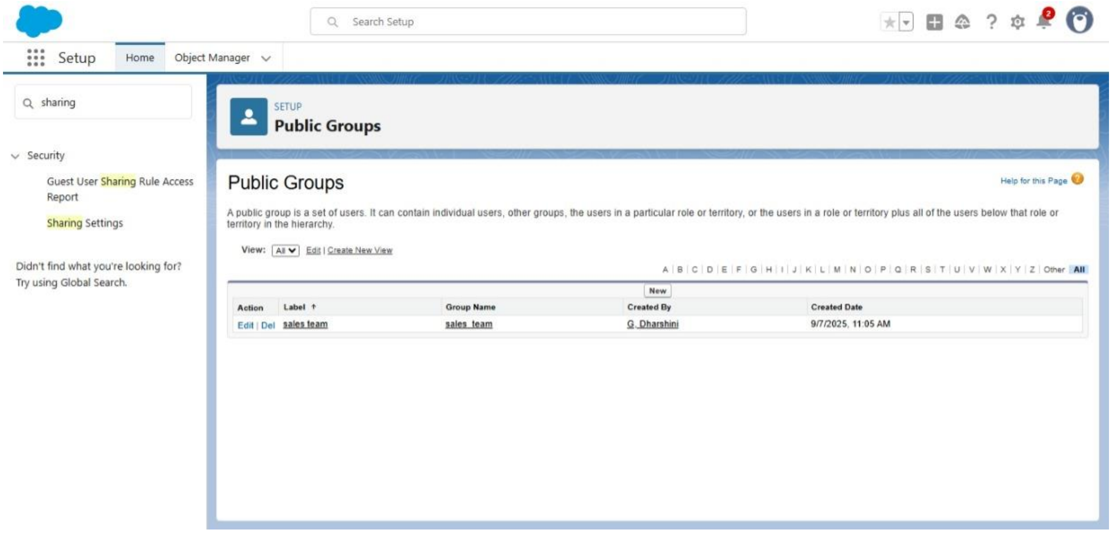


- Create another users using the above steps.

Creating New Public Group :

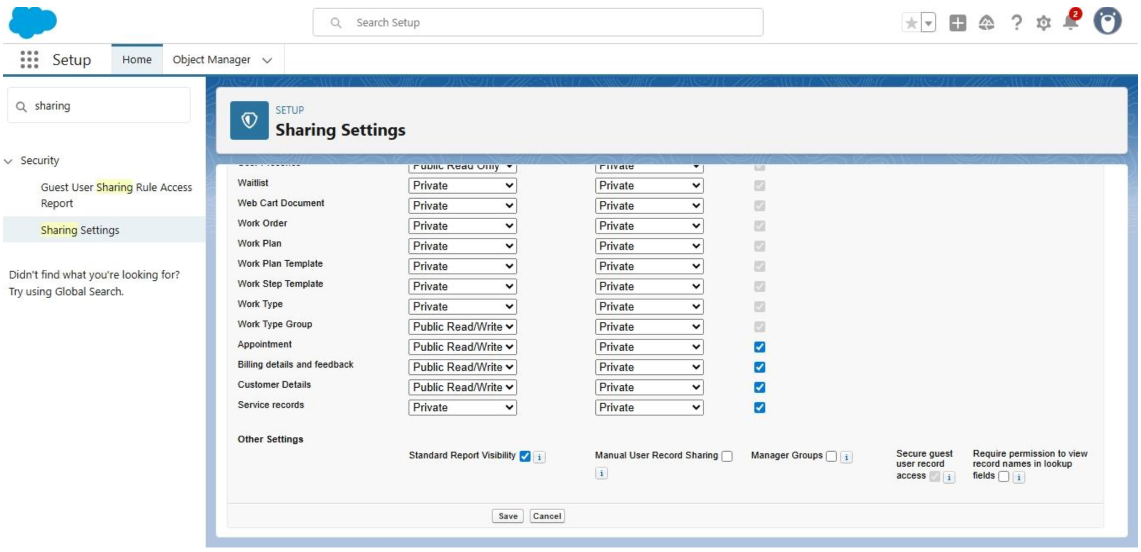
- Go to setup >> type users in quick find box >> select public groups >> click New.

- Lable name as “Sales team”



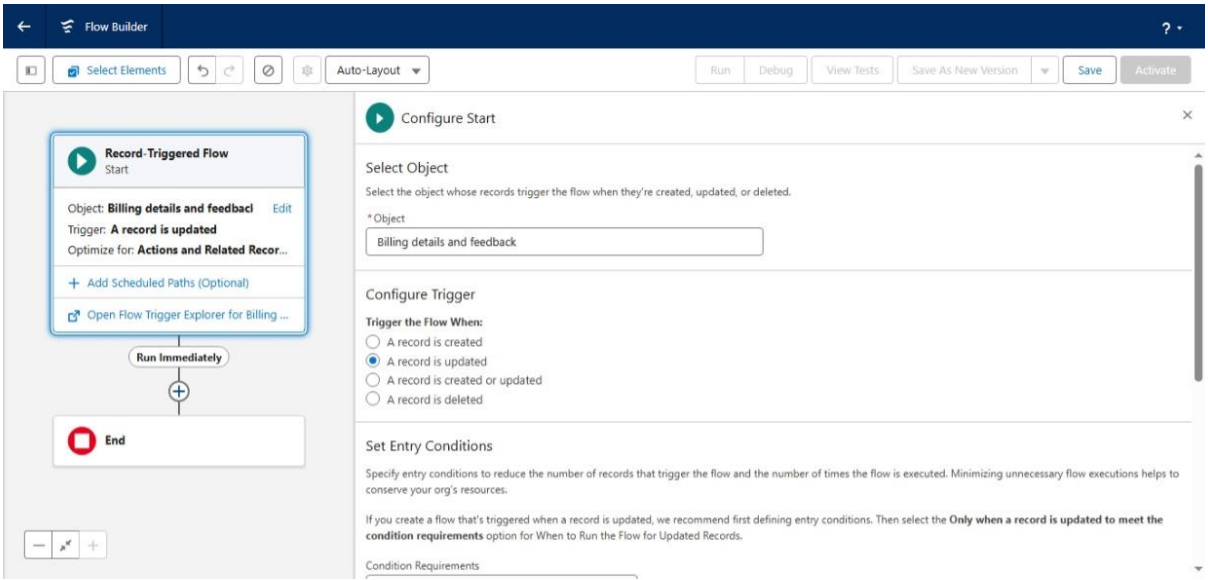
Creating the Sharing settings :

- In quick find box select the share setting records
- Change the OWD setting of the service record object to private



Create a Flow :

- Type flow in Quick find box then click the new flow
- Select the object as “Billing details and feedback”



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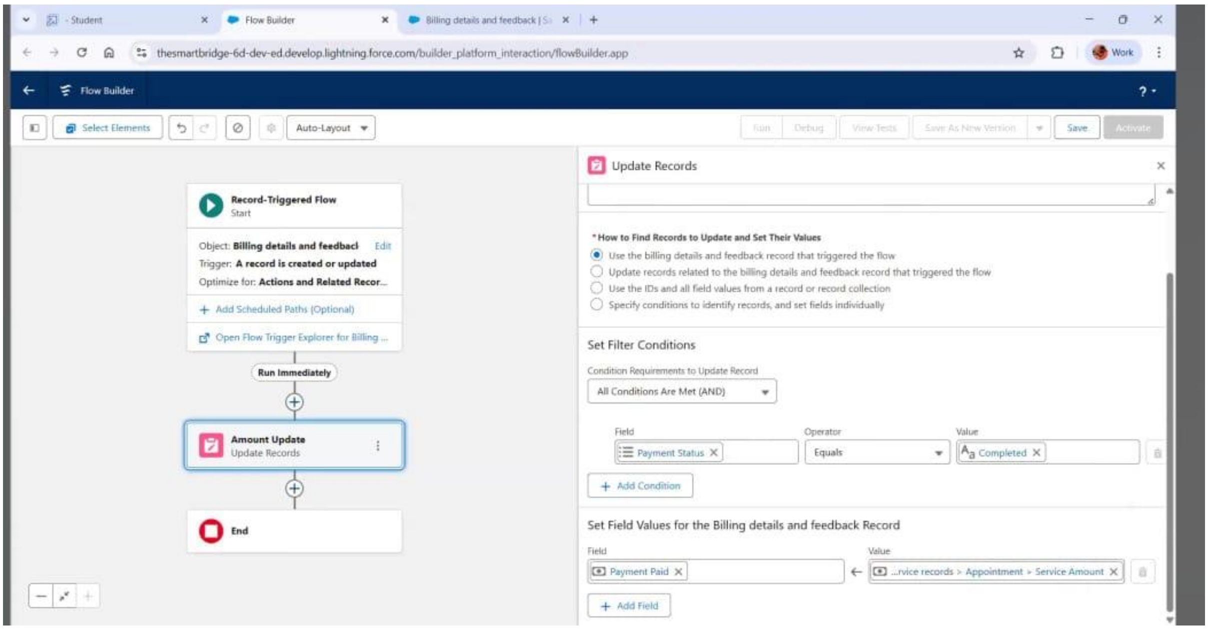
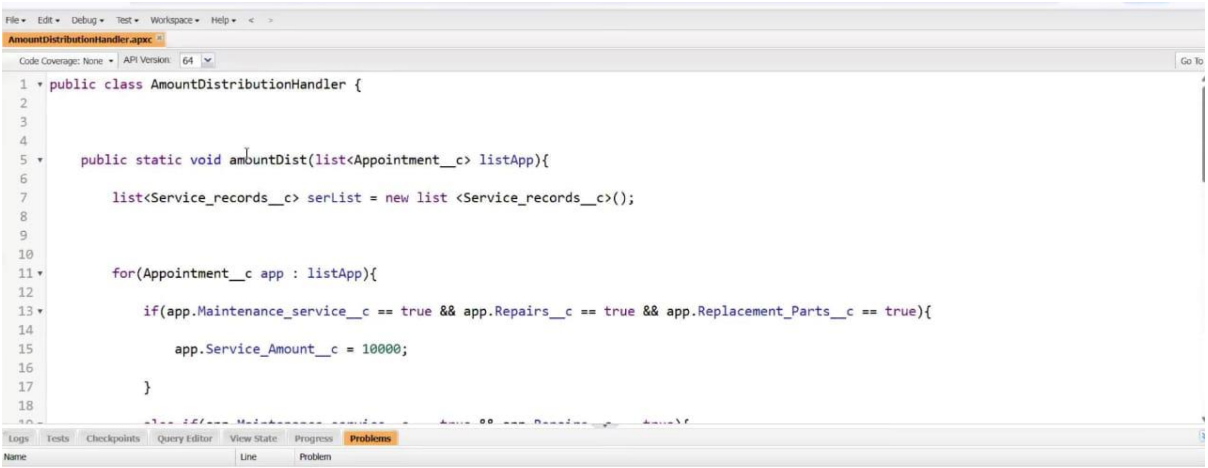


- Create the lable name as “Amount update”
- Give the details same as above the picture.
- Then create the another Flows

Apex Trigger :

- Click the Developer console Then create new Apex class
- Name the class as “AmountDistributorHandler”

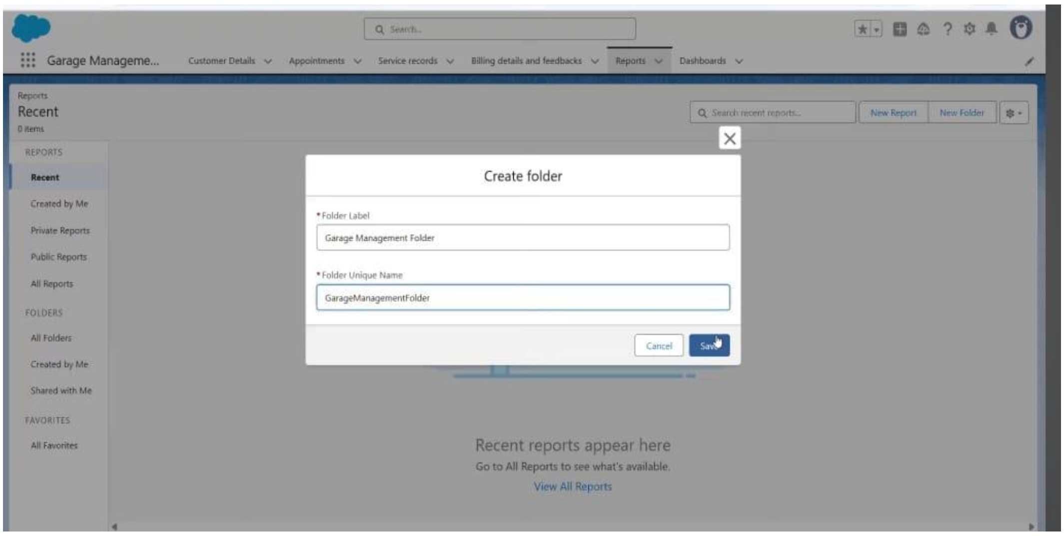
4. Copy the code in the instruction page.

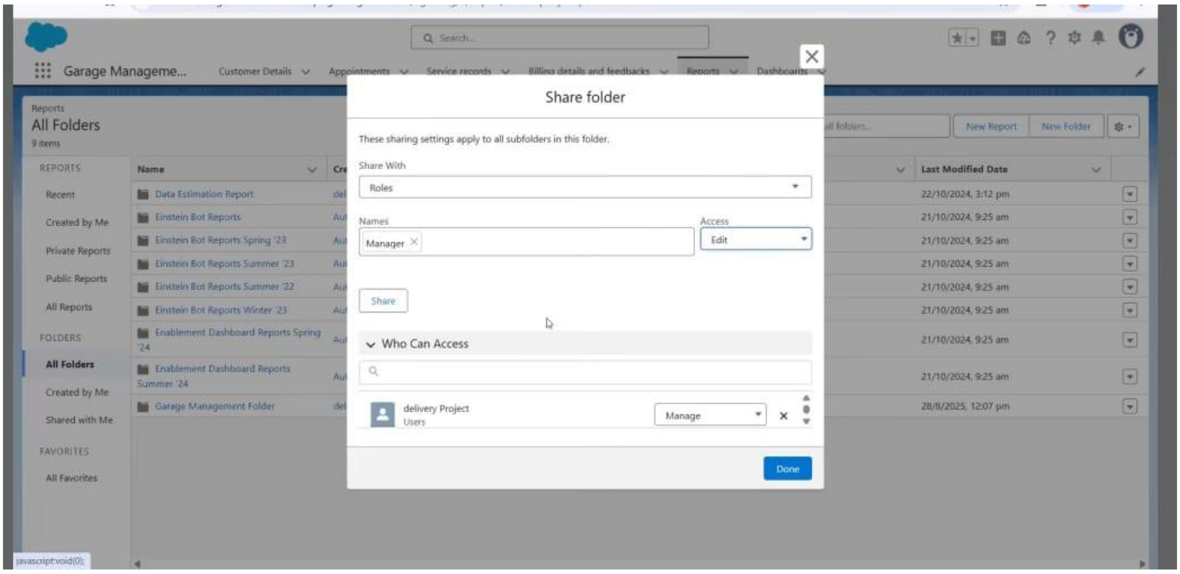


- Then the create the Apex Trigger and copy the code in instruction page.

Create a Report Folder :

- Click on the app launcher and search for reports.
- Click on the report tab, click on new folder.
- Give the Folder label as “Garage Management Folder”, Folder unique name will be auto populated then Click save

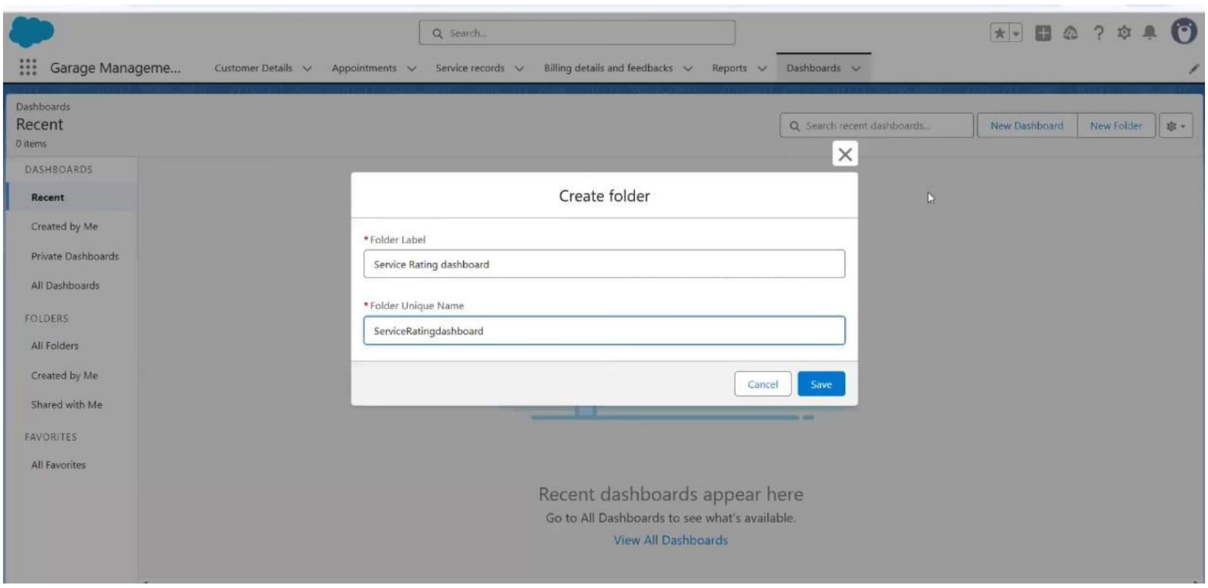




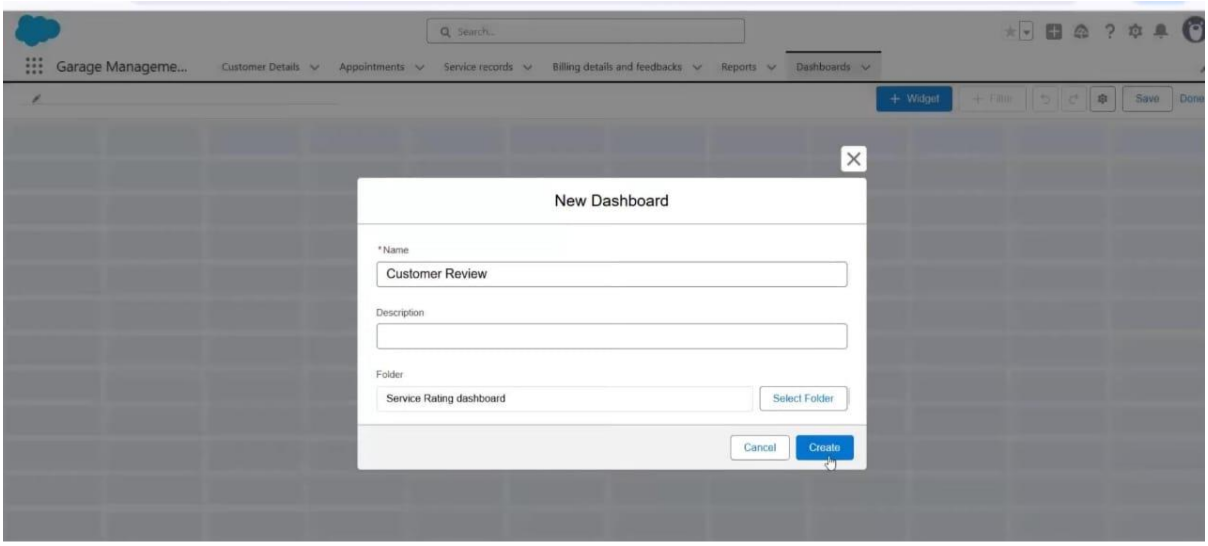
- Then create the Report type and Report

Create Dashboard Folder :

- Click on the app launcher and search for dashboard.
- Click on dashboard tab.
- Click new folder, give the folder label as " Service Rating dashboard".
- Folder unique name will be auto populated and Click save.

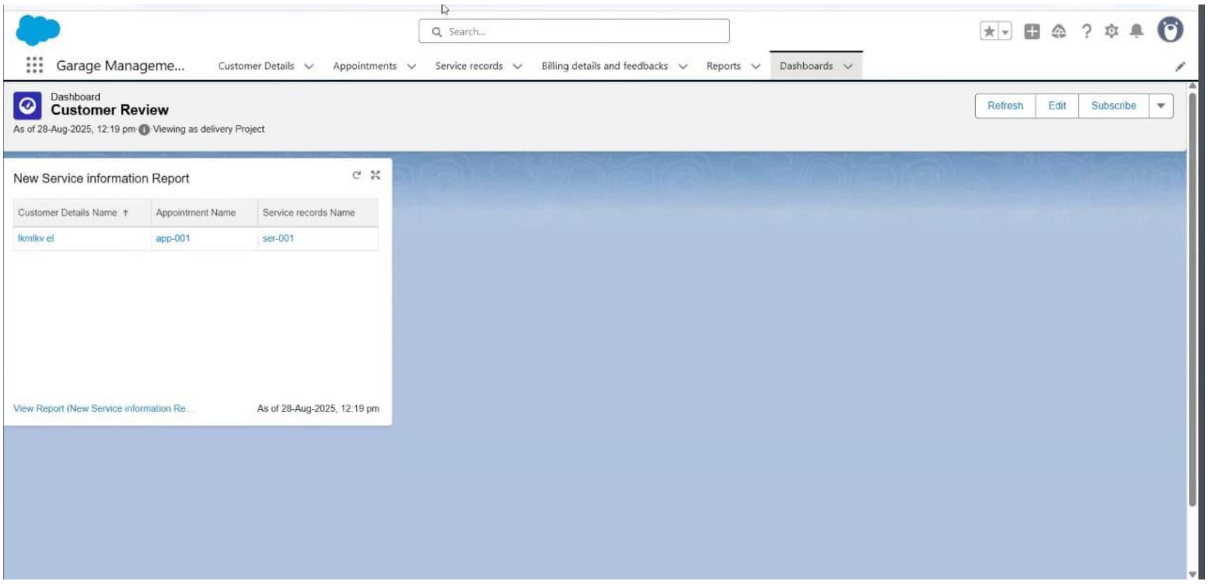


- Now create the dashboard



Creating Records :

- To create a record in the follow objects follow these steps.
- Click on the app launcher located at the left side of the screen.
- Search for “ Garage Management” and click on it.
- Click on the “ Consumer details tab” and fill the details then click save.



- Then create the Appointment record and service record.
- Now automatically Service status will be moved to completed.

Conclusion :

The Garage Management System makes garage work easier by storing customer and vehicle details in one place. It saves time, reduces mistakes, and helps in giving better service. This project is useful for managing daily garage activities in a simple and effective way

THANK YOU