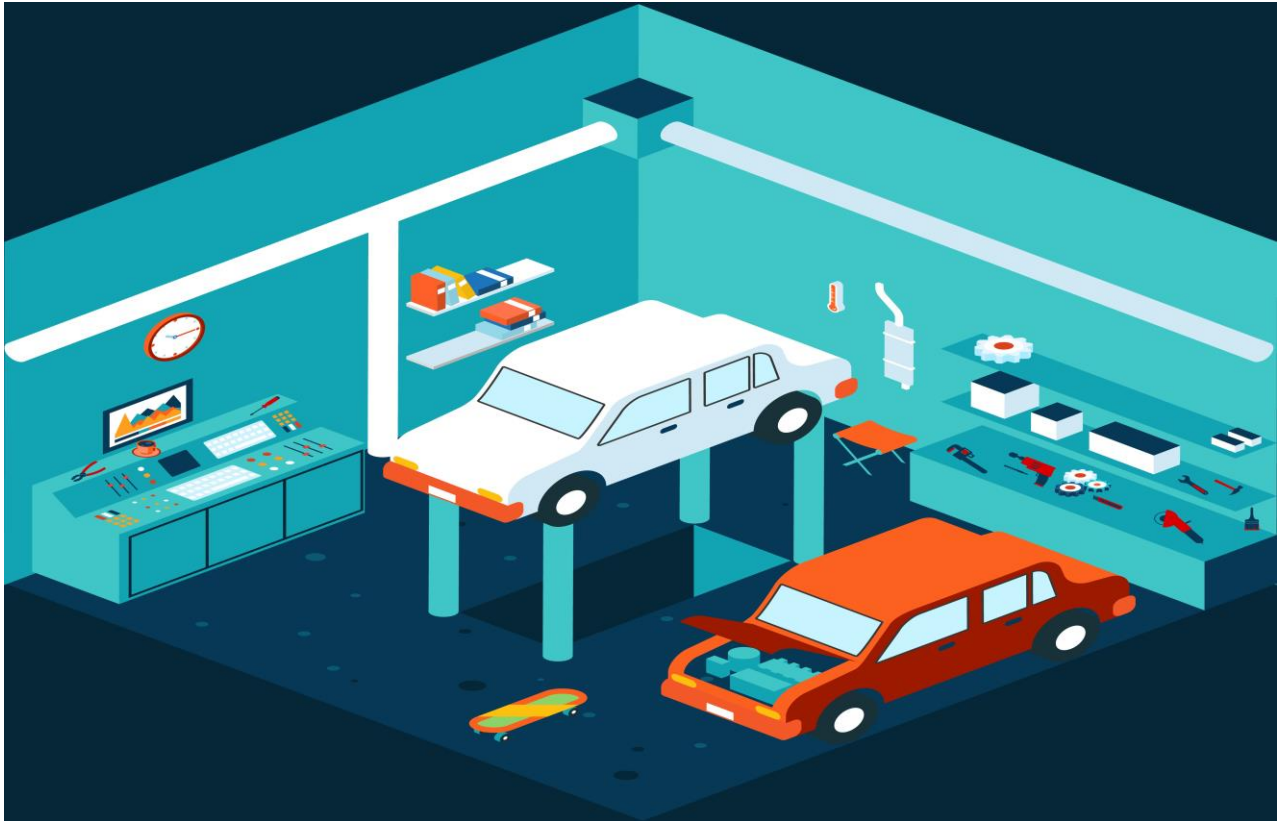


Garage Management System



Project by,
K DURGA DEVI
21BQ1A4256@vvit.net

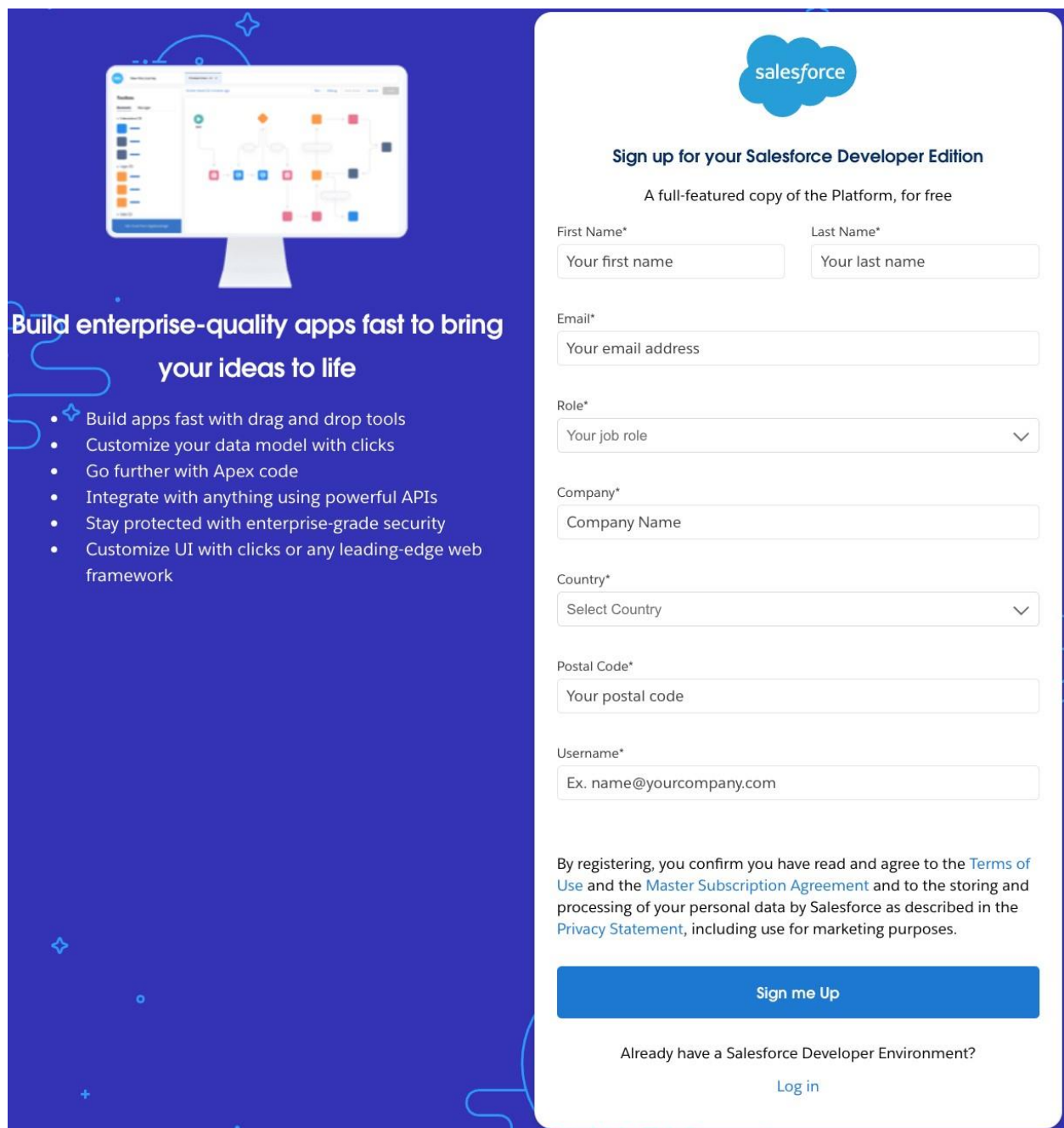
About Garage Management System:

The Garage Management System is a valuable tool for automotive repair facilities, helping them deliver top-notch service, increase operational efficiency, and build lasting customer relationships. With its user-friendly interface and powerful features, GMS empowers garages to thrive in a competitive market while ensuring a seamless and satisfying experience for both customers and staff. 1 1

Garage Management System Setup Guide

1. Creating a Salesforce Developer Account:

1. Visit Salesforce Developer Signup.



The image shows the Salesforce Developer Signup form. On the left, there is a blue background with a white monitor displaying a flowchart. Below the monitor, the text "Build enterprise-quality apps fast to bring your ideas to life" is written in white. To the right of this text is a bulleted list of features. On the right side of the image, the Salesforce logo is at the top, followed by the heading "Sign up for your Salesforce Developer Edition" and a subheading "A full-featured copy of the Platform, for free". Below this are several form fields: "First Name*", "Last Name*", "Email*", "Role*", "Company*", "Country*", "Postal Code*", and "Username*". Each field has a placeholder text. At the bottom of the form is a blue button labeled "Sign me Up". Below the button is a link "Log in" and a text "Already have a Salesforce Developer Environment?".

Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

Sign up for your Salesforce Developer Edition

A full-featured copy of the Platform, for free

First Name*
Your first name

Last Name*
Your last name

Email*
Your email address

Role*
Your job role

Company*
Company Name

Country*
Select Country

Postal Code*
Your postal code

Username*
Ex. name@yourcompany.com

By registering, you confirm you have read and agree to the [Terms of Use](#) and the [Master Subscription Agreement](#) and to the storing and processing of your personal data by Salesforce as described in the [Privacy Statement](#), including use for marketing purposes.

Sign me Up

Already have a Salesforce Developer Environment?
[Log in](#)

2. Fill out the signup form:

- o. First Name & Last Name
- o. Email
- o. Role: Developer
- o. Company: College Name

- o. Country: India
- o. Postal Code: Your Pin Code
- o. Username: (e.g., username@organization.com)

2. Account Activation

1. Check your email inbox for a verification email from Salesforce.
2. Click Verify Account.
3. Set up your password and security question, then click Change Password.

3. Creating Salesforce Objects

3.1 Customer Details Object

1. Go to Object Manager > Create > Custom Object.
2. Configure the following:
 - o. Label Name: Customer Details
 - o. Plural Label Name: Customer Details
 - o. Record Name: Customer Name (Text)
3. Enable Allow Reports, Track Field History, and Allow Search.
4. Click Save.

3.2 Appointment Object

1. Go to Object Manager > Create > Custom Object.
2. Configure the following:
 - o. Label Name: Appointment
 - o. Plural Label Name: Appointments
 - o. Record Name: Appointment Name (Auto Number)
 - o. Display Format: app-{000}, Starting Number: 1
3. Enable Allow Reports, Track Field History, and Allow Search.
4. Click Save.

3.3 Service Records Object

1. Go to Object Manager > Create > Custom Object.
2. Configure the following:
 - o. Label Name: Service Records
 - o. Plural Label Name: Service Records
 - o. Record Name: Service Records Name (Auto Number)

- o. Display Format: ser-{000}, Starting Number: 1
- 3. Enable Allow Reports, Track Field History, and Allow Search.
- 4. Click Save.

3.4 Billing Details and Feedback Object

1. Go to Object Manager > Create > Custom Object.
2. Configure the following:
 - o. Label Name: Billing Details and Feedback
 - o. Plural Label Name: Billing Details and Feedback
 - o. Record Name: Billing Details and Feedback Name (Auto Number)
 - o. Display Format: bill-{000}, Starting Number: 1
3. Enable Allow Reports, Track Field History, and Allow Search.
4. Click Save.

4. Creating Custom Tabs

1. Go to Setup > Tabs > New (under Custom Object Tabs).
2. Select the object (e.g., Customer Details), choose a tab style, and click Next.
3. Configure profile visibility as needed and click Next.
4. Click Save.

Repeat for remaining objects (Appointments, Service Records, Billing Details and Feedback).

5. Creating a Lightning App

1. Go to Setup > App Manager > New Lightning App.
2. Configure the app:
 - o. App Name: Garage Management Application
 - o. Leave other settings as default and click Next.
3. Add navigation items (Customer Details, Appointments, Service Records, Billing Details and Feedback, Reports, Dashboards) and click Next.
4. Assign the System Administrator profile to the app and click Save & Finish.

6. Creating Fields for Objects

6.1 Customer Details Object

1. Go to Setup > Object Manager > Customer Details > Fields & Relationships > New.
2. Create the following fields:
 - o. Phone Number (Phone)
 - o. Gmail (Email)

6.2 Appointment Object

1. Create a Lookup Relationship to Customer Details.
2. Create the following fields:
 - o. Maintenance Service (Checkbox)
 - o. Repairs (Checkbox)
 - o. Replacement Parts (Checkbox)
 - o. Appointment Date (Date)
 - o. Service Amount (Currency)
 - o. Vehicle Number Plate (Text)

6.3 Service Records Object

1. Create a Lookup Relationship to Appointment.
2. Create the following fields:
 - o. Quality Check Status (Checkbox)
 - o. Service Status (Picklist: Started, Completed)
 - o. Service Date (Formula: Created Date)

6.4 Billing Details and Feedback Object

1. Create a Lookup Relationship to Service Records.
2. Create the following fields:
 - o. Payment Paid (Currency)
 - o. Rating for Service (Text)
 - o. Payment Status (Picklist: Pending, Completed)

7. Creating Validation Rules

7.1 Appointment Object

- Rule Name: Vehicle
- Formula: NOT(REGEX(Vehicle_number_plate__c, "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))
- Error Message: Please enter a valid number.

7.2 Service Records Object

- Rule Name: service_status_note
- Formula: NOT(ISPICKVAL(Service_Status__c, "Completed"))
- Error Message: Still it is pending.

7.3 Billing Details and Feedback Object

- Rule Name: rating_should_be_less_than_5

- Formula: NOT(REGEX(Rating_for_service__c, "[1-5]{1}"))
- Error Message: Rating should be from 1 to 5.

8. Creating a Flow

8.1 Create Flow for Billing Details and Feedback

1. Go to Setup > Flow > New Flow.
2. Select Record-triggered flow.
3. Configure the flow to trigger when a record is created or updated.
4. Add an Update Records element:
 - o. Label: Amount Update
 - o. Filter Condition: Payment Status = Completed
 - o. Field Values: Set Payment Paid to Service_Amount__c.
5. Add an Email Alert element:
 - o. Label: Email Alert
 - o. Recipient: {!\$Record.Service_records__r.Appointment__r.Customer_Name__r.Gmail__c}
 - o. Subject: Thank You for Your Payment - Garage Management
 - o. Body: Use a text template to include customer details and payment amount.
6. Save and activate the flow.

9. Apex Code for Amount Distribution

9.1 Create an Apex Handler Class Code:

```
Code: public class AmountDistributionHandler {
    public static void amountDist(list
listApp) {
        for (Appointment__c app : listApp) {
            if
(app.Maintenance_service__c && app.Repairs__c && app.Replacement_Parts__c) {
                app.Service_Amount__c = 10000;
            }
            else if (app.Maintenance_service__c && app.Repairs__c) {
                app.Service_Amount__c =
                5000;
            }
            else if (app.Maintenance_service__c && app.Replacement_Parts__c) {
                app.Service_Amount__c
                = 8000;
            }
            else if (app.Repairs__c && app.Replacement_Parts__c) {
                app.Service_Amount__c =
                7000;
            }
            else if (app.Maintenance_service__c) {
```

```

app.Service_Amount__c = 2000;
} else if (app.Repairs__c) {
app.Service_Amount__c = 3000;
}
else if (app.Replacement_Parts__c) {          app.Service_Amount__c =
5000;
}
}
}
}
}
}

```

9.2 Create a Trigger for Appointment Code: trigger AmountDistribution on Appointment__c (before insert, before update) {
 if (trigger.isBefore && (trigger.isInsert || trigger.isUpdate)) {
 AmountDistributionHandler.amountDist(trigger.new);
 }
}

10. Creating Reports

10.1 Create a Report Folder

1. Go to App Launcher > Reports > New Folder.
2. Name the folder Garage Management Folder and click Save.

10.2 Create a Report Type

1. Go to Setup > Report Types > New Custom Report Type.
2. Select Customer Details as the primary object.
3. Add Appointment, Service Records, and Billing Details and Feedback as related objects.

10.3 Create Reports

1. Go to Reports > New Report.
2. Use the custom report type to create and customize your reports.

10. Creating Dashboards

10.1 Create a Dashboard Folder

1. Click on the app launcher and search for dashboard.
2. Click on dashboard tab.
3. Click new folder, give the folder label as “ Service Rating dashboard”.
4. Folder unique name will be auto populated.
5. Click save.

6. Share the Dashboard Folder with the Role "Manager".

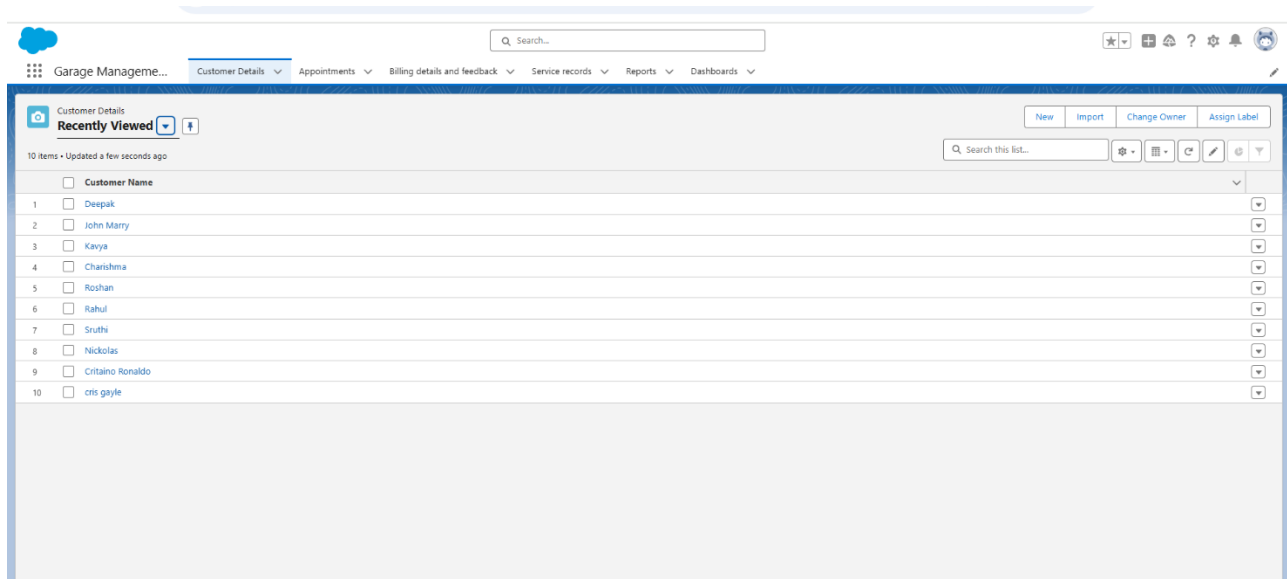
10.2 Create Dashboard

1. Go to the app >> click on the Dashboards tabs.
2. Give a Name and select the folder that created, and click on create.
3. Select add component.
4. Select a Report and click on select.
5. Select the Line Chart. Change the theme.
6. Click Add then click on Save and then click on Done.
7. Preview is shown below.
8. After that Click on Subscribe on top right.
9. Set the Frequency as “ weekly ”.
10. Set a day as monday.
11. And Click on save.
- 12.The Dashboard is created.

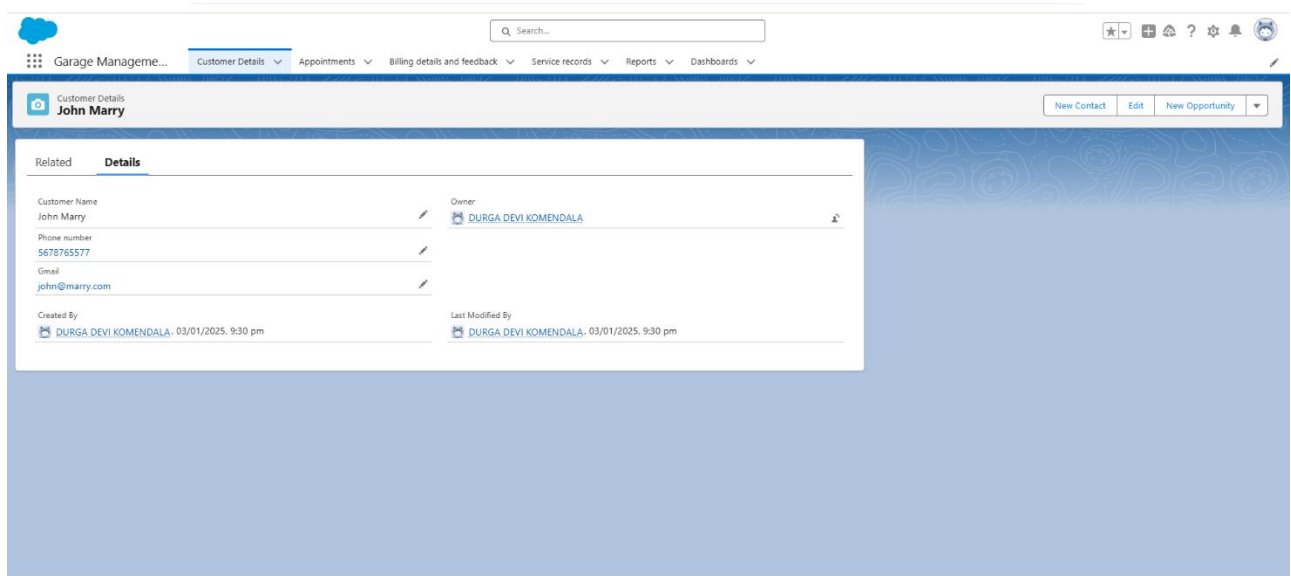
Garage Management System Overview

Customer Details

The Customer Details tab shows the list of Customers and their details.

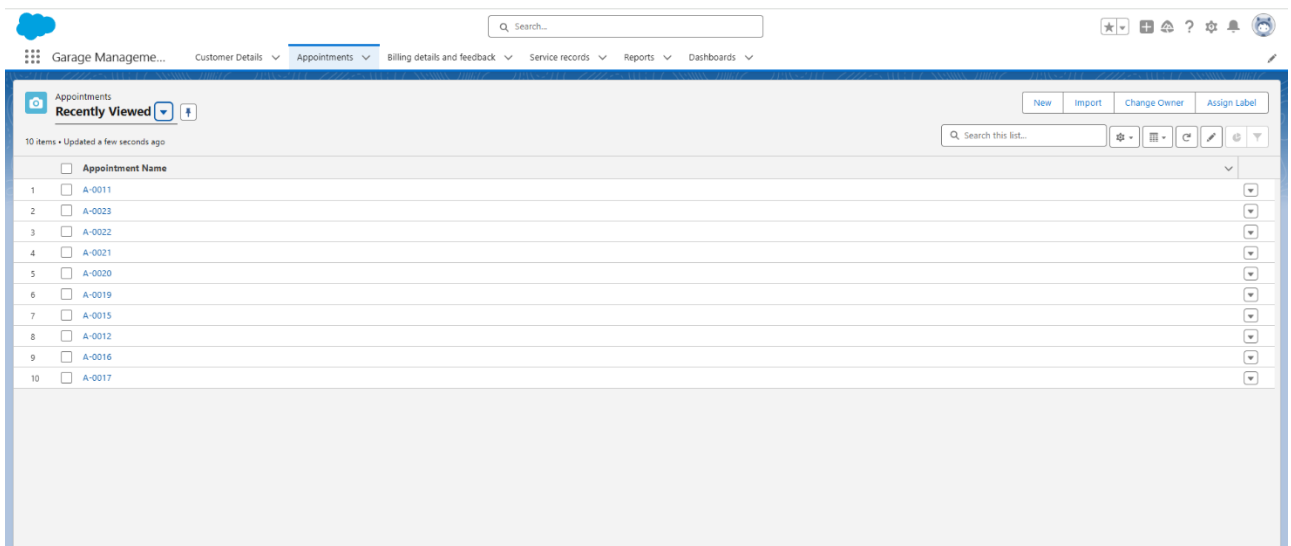


	Customer Name	
1	<input type="checkbox"/> Deepak	
2	<input type="checkbox"/> John Marry	
3	<input type="checkbox"/> Kavya	
4	<input type="checkbox"/> Charishma	
5	<input type="checkbox"/> Roshan	
6	<input type="checkbox"/> Rahul	
7	<input type="checkbox"/> Sruthi	
8	<input type="checkbox"/> Nickolas	
9	<input type="checkbox"/> Cristiano Ronaldo	
10	<input type="checkbox"/> cris gayle	



Appointments

Shows the list of appointments and the appointment details.



Garage Manage...

Customer Details

Appointments

Billing details and feedback

Service records

Reports

Dashboards

Search...

★

+

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?

🔔

👤

Appointment

A-0011

New Contact

Edit

New Opportunity

Related

Details

Appointment Name

A-0011

Customer Details

John Mary

Appointment Date

04/01/2024

Maintenance service

☒

Repairs

☐

Replacement Parts

☐

Service Amount

₹15,000

Vehicle number plate

TS30EU0411

Owner

DURGA DEVI KOMENDALA

Created By

DURGA DEVI KOMENDALA · 03/01/2025, 9:47 pm

Last Modified By

DURGA DEVI KOMENDALA · 08/01/2025, 1:56 pm

Service Records

Shows the details of every Service record of the customer

Garage Manage...

Customer Details

Appointments

Billing details and feedback

Service records

Reports

Dashboards

Search...

★

+

🏠

?

🔔

👤

Service records

Recently Viewed

New

Import

Change Owner

Assign Label

10 Items • Updated a few seconds ago

Search this list...

⚙

🗑

🔄

✎

👤

⌵

	<input type="checkbox"/> Service records Name	
1	<input type="checkbox"/> ser-021	🗑
2	<input type="checkbox"/> ser-019	🗑
3	<input type="checkbox"/> ser-017	🗑
4	<input type="checkbox"/> ser-018	🗑
5	<input type="checkbox"/> ser-026	🗑
6	<input type="checkbox"/> ser-016	🗑
7	<input type="checkbox"/> ser-025	🗑
8	<input type="checkbox"/> ser-024	🗑
9	<input type="checkbox"/> ser-023	🗑
10	<input type="checkbox"/> ser-022	🗑

Cloud logo

Search...

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

Service records ser-026 New Contact Edit New Opportunity

Related Details

Service records Name ser-026 Owner DURGA DEVI KOMENDALA

Appointment A-0023

Quality Check Status ☒

Service Status Completed

service date 08/01/2025

Created By DURGA DEVI KOMENDALA, 08/01/2025, 1:48 pm Last Modified By DURGA DEVI KOMENDALA, 08/01/2025, 1:48 pm

30°C Haze Search

ENG IN 16:39 08-01-2025

Billing Details and Feedback

Contains the overall summary of service, amount paid by the customer, payment status and Rating for the service

Cloud logo

Search...

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

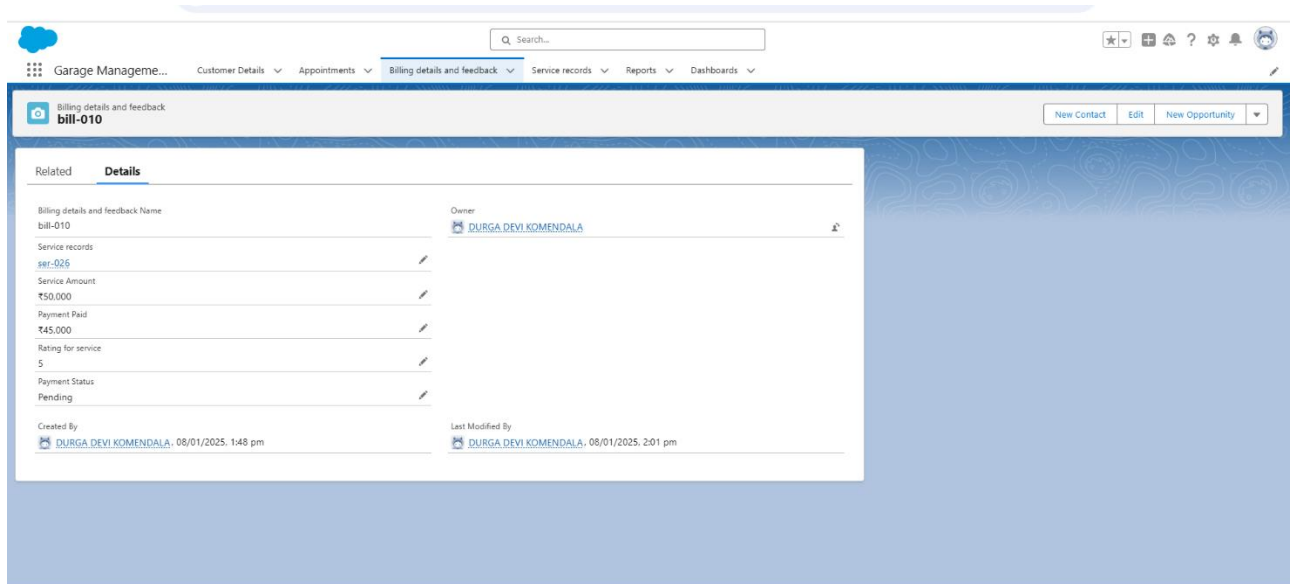
Billing details and feedback Recently Viewed

New Import Change Owner Assign Label

10 items • Updated a few seconds ago

Search this list...

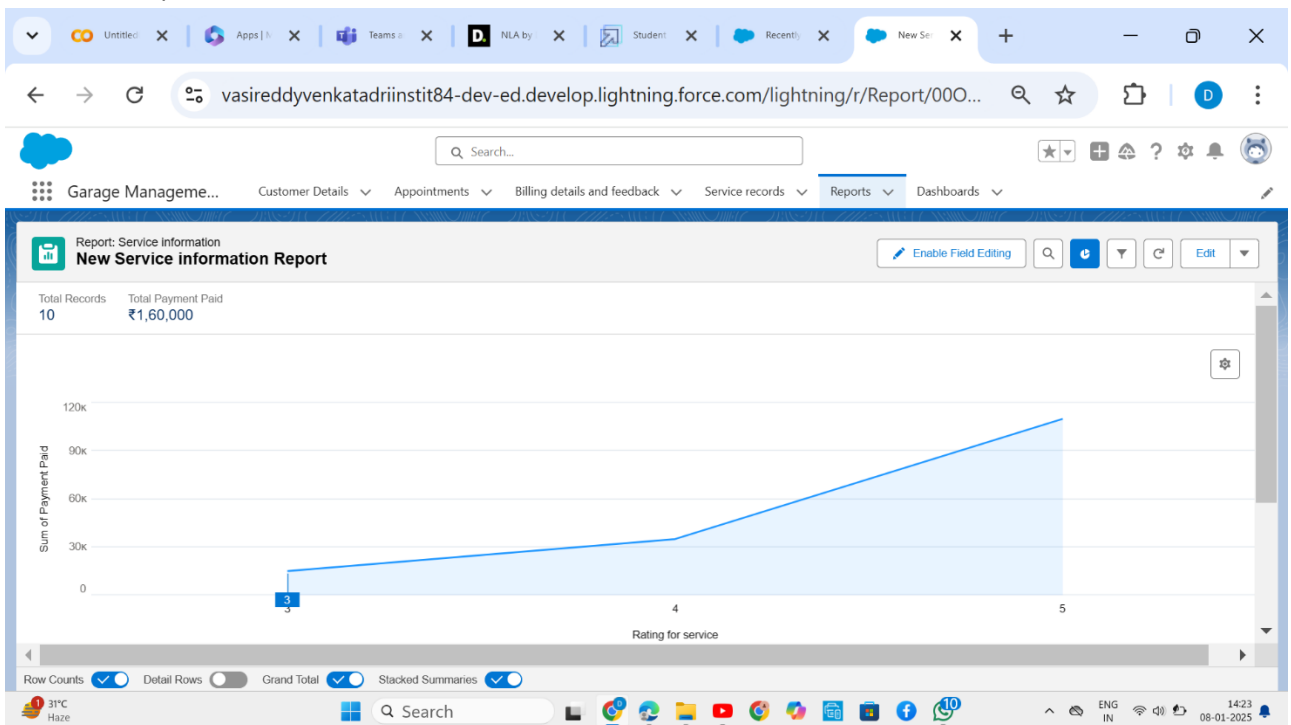
	Billing details and feedback Name	
1	bill-001	
2	bill-004	
3	bill-005	
4	bill-010	
5	bill-009	
6	bill-008	
7	bill-007	
8	bill-006	
9	bill-003	
10	bill-002	



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. Types of Reports in Salesforce

1. Tabular
2. Summary
3. Matrix
4. Joined Rep



Report: Service Information
New Service Information Report

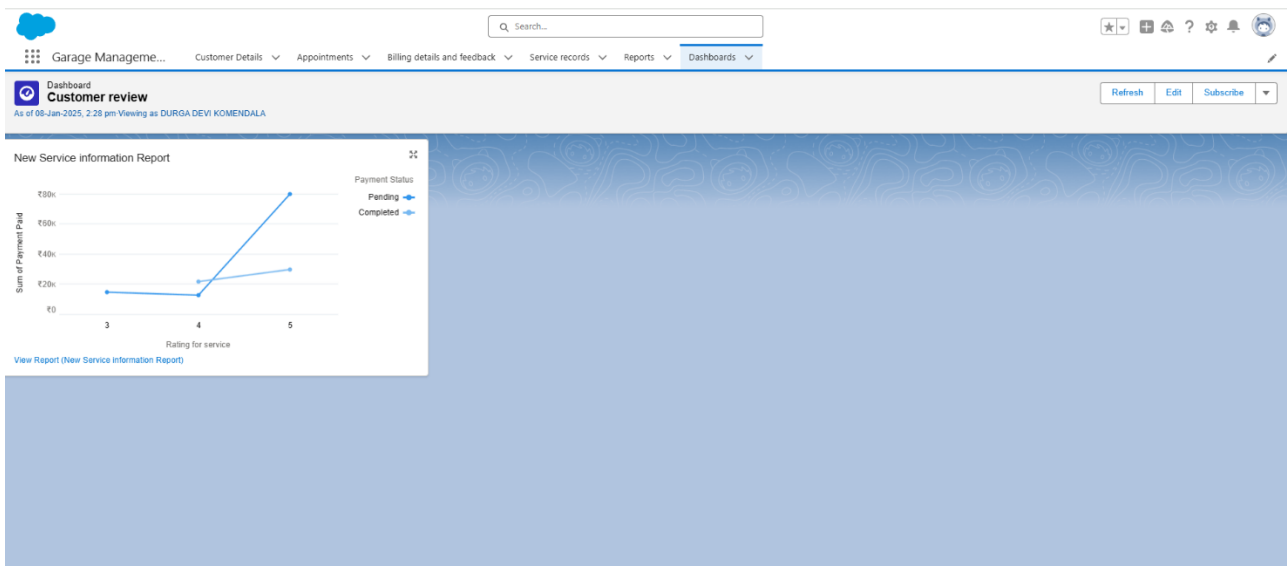
Enable Field Editing

Payment Status	Rating for service	Customer Name	Service Status	Payment Paid	Appointment Date
Pending (4)	3 (1)	Charishma	Started	₹15,000	22/08/2024
	Subtotal			₹15,000	
	4 (1)	John Marry	Completed	₹13,000	04/01/2024
	Subtotal			₹13,000	
	5 (2)	Roshan	Completed	₹35,000	12/06/2024
		Deepak	Completed	₹45,000	03/12/2024
	Subtotal			₹80,000	
	Subtotal			₹1,08,000	
Completed (6)	4 (4)	cris gayle	Completed	₹4,000	03/01/2024
		Kavya	Completed	₹1,000	05/01/2024
		Nickolas	Completed	₹2,000	03/01/2024
		Sruthi	Completed	₹15,000	18/07/2024

Row Counts: ☒ Detail Rows: ☒ Subtotals: ☒ Grand Total: ☒

Dashboard

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



Dashboard

Customer review

As of 08-Jan-2025, 2:28 pm Viewing as DURGA DEVI KOMENDALA

RefreshEditSubscribe ▾

New Service information Report



Rating for service	Pending (£)	Completed (£)
3	20000	10000
4	10000	20000
5	80000	30000

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