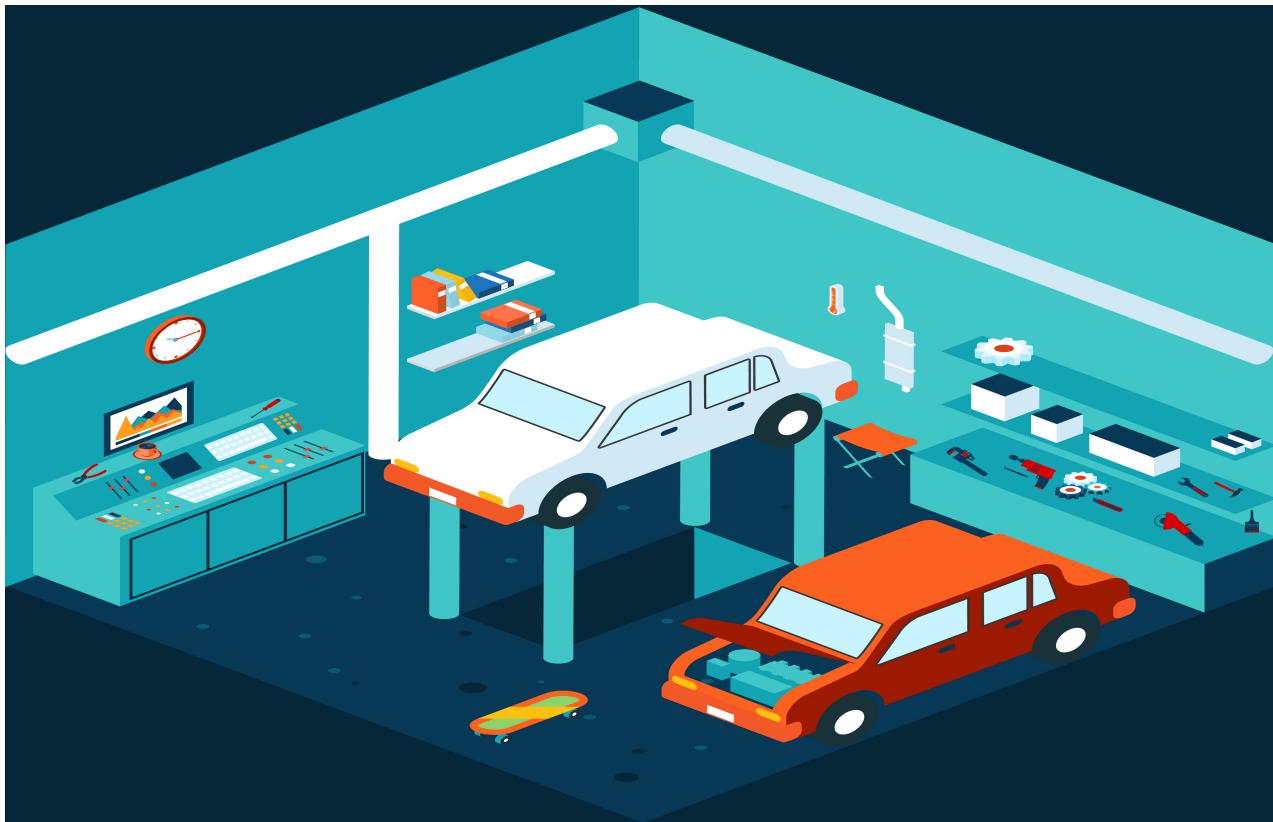


Garage Management System



Project by,
Nandini Gajula
gajulanandini86@gmail.com

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.11

Garage Management System Setup Guide

1. Creating a Salesforce Developer Account:

1. Visit Salesforce Developer Signup.

The image shows a composite view of the Salesforce Developer Edition website. On the left, there's a promotional banner with a computer monitor displaying a drag-and-drop app builder interface. The text on the banner reads: "Build enterprise-quality apps fast to bring your ideas to life". Below this, a list of features includes:

- 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

On the right, the actual sign-up form is displayed. It features the Salesforce logo at the top. The form fields include:

- First Name* (text input: Your first name)
- Last Name* (text input: Your last name)
- Email* (text input: Your email address)
- Role* (dropdown menu: Your job role)
- Company* (text input: Company Name)
- Country* (dropdown menu: Select Country)
- Postal Code* (text input: Your postal code)
- Username* (text input: Ex. name@yourcompany.com)

At the bottom of the form, a note states: "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." A large blue "Sign me Up" button is centered at the bottom of the form. Below the button, links for "Already have a Salesforce Developer Environment?" and "Log in" are visible.

2. Fill out the signup form:

- . First Name & Last Name
- . Email
- . Role: Developer
- . Company: College Name
- . Country: India
- . Postal Code: Your Pin Code
- . 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:
 - . Label Name: Customer Details
 - . Plural Label Name: Customer Details
 - . 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:
 - . Label Name: Appointment
 - . Plural Label Name: Appointments
 - . Record Name: Appointment Name (Auto Number)
 - . 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.

The screenshot shows a web browser window with multiple tabs open. The active tab is a Salesforce Lightning page titled "Customer Details" under the "Recently Viewed" filter. The page displays a list of 15 items, each with a checkbox and a name: Sandhya, Mohan, Priya, Puja, Harika, Madhu, SriKiran, Karthik, Arjun, Charan, Mahesh, Nani, and Balu. The browser's address bar shows the URL: https://vvit-dc-dev-ed.lightning.force.com/lightning/o/Customer_Details__c/list?filterName=_Recent. The system status bar at the bottom indicates it's 24°C Rain, 11:02, and the date is 31-08-2024.

The screenshot shows a web browser window with multiple tabs open. The active tab is a Salesforce Lightning page titled "Customer Details" for the contact "Mohan". The page displays various details about the customer, including Customer Name (Mohan), Phone number (07569223970), Gmail (mohan17@gmail.com), Owner (Nandini Gajula), and the last modified by (Nandini Gajula) on 27/08/2024, 6:41 pm. The browser's address bar shows the URL: https://vvit-dc-dev-ed.lightning.force.com/lightning/o/Customer_Details__c/a00dM00000MHX7WQAX/view. The system status bar at the bottom indicates it's 24°C Rain, 11:02, and the date is 31-08-2024. A Copilot in Windows (preview) message is visible in the bottom right corner.

Appointments

Shows the list of appointments and the appointment details.

The screenshot shows a web browser with two tabs open, both displaying the Salesforce Lightning interface.

Top Tab:

- Title: Garage Management
- Sub-header: Appointments
- Section: Recently Viewed
- Content: A list of 10 recently viewed appointments, each with a checkbox and a link labeled 'app-018' through 'app-009'.
- Buttons: New, Import, Change Owner, Assign Label.
- Search bar: Search this list...

Bottom Tab:

- Title: Garage Management
- Sub-header: Appointments
- Content: Details for Appointment app-016. The 'Details' tab is selected.
- Fields shown:
 - Appointment Name: app-016
 - Customer Details: Mohan
 - Maintenance service: Repairs (checkbox checked)
 - Replacement Parts: (checkbox unchecked)
 - Appointment Date: 08/08/2024
 - Service Amount: ₹25,000
 - Vehicle number plate: (checkbox unchecked)
- Owner: Nandini Gajula
- Buttons: New Contact, Edit, New Opportunity.

Service Records

Shows the details of every Service record of the customer

The screenshot shows a web browser window with multiple tabs open. The active tab is for a Service records page in a Salesforce Lightning environment. The URL is https://vvit-dc-dev-ed.lightning.force.com/lightning/o/Service_records__c/list?filterName=_Recent. The page title is "Garage Management". The main content area shows a list of 10 items under "Recently Viewed". Each item has a checkbox next to its name. The names listed are: 1. ser-015, 2. ser-014, 3. ser-013, 4. ser-012, 5. ser-011, 6. ser-010, 7. ser-009, 8. ser-008, 9. ser-007, 10. ser-006. Below this list, there is a detailed view of a specific service record. The record ID is a02dM000004b9JlQAI. The details shown include:

Field	Value
Service records Name	ser-013
Appointment	app-016
Quality Check Status	<input checked="" type="checkbox"/>
Service Status	Completed
service date	30/08/2024
Created By	Nandini Gajula, 30/08/2024, 9:17 pm
Last Modified By	Nandini Gajula, 30/08/2024, 9:17 pm

The browser interface includes a search bar, a toolbar with various icons, and a status bar at the bottom showing the date and time (31-08-2024, 11:13). There are also notifications and system status indicators.

Billing Details and Feedback

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

The screenshot shows a web browser with two open tabs, both from the 'Garage Management' app on Salesforce Lightning.

Top Tab:

- Title: Billing details and feedback
- Section: Recently Viewed
- Content: A list of 10 items named 'bill-016' through 'bill-006'.
- Buttons: New, Import, Change Owner, Assign Label.

Bottom Tab:

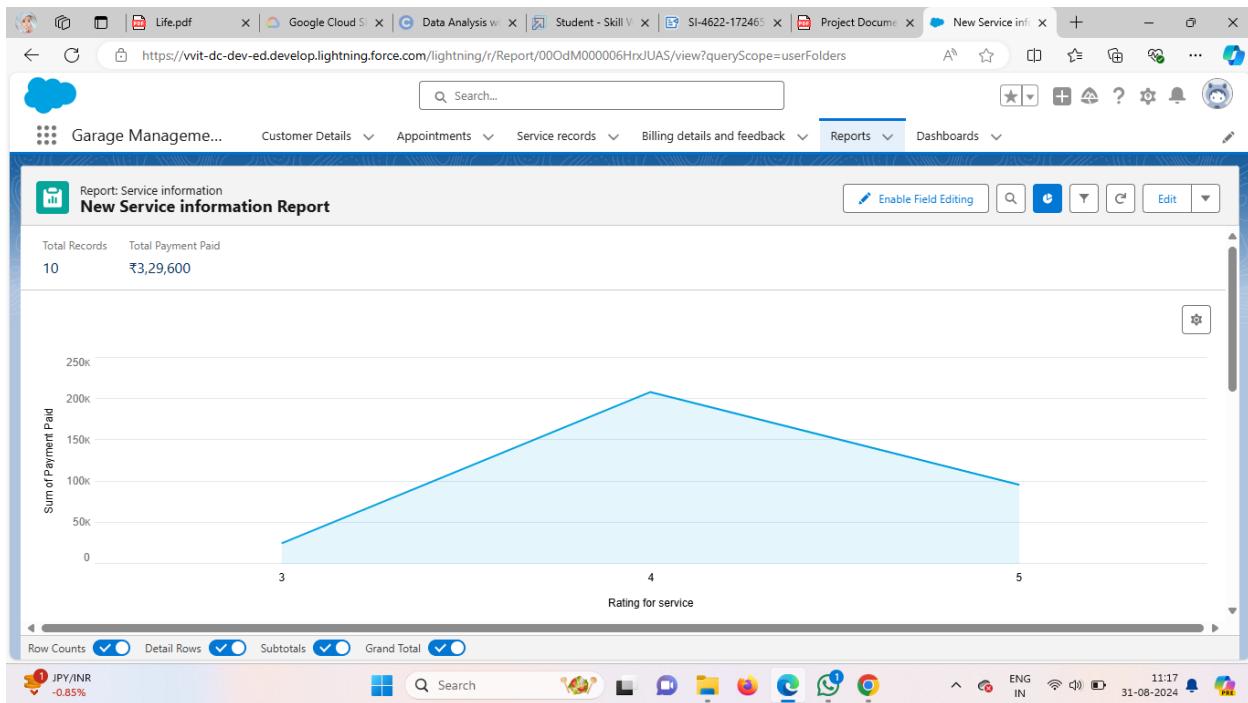
- Title: Billing details and feedback
- Section: bill-016
- Content: Detailed view of the item, showing fields like Billing details and feedback Name (bill-016), Service records (ser-015), Payment Paid (₹3,800), Rating for service (4), and Payment Status (Completed). It also shows the Owner as Nandini Gajula and the creation date as 30/08/2024, 9:22 pm.
- Buttons: New Contact, Edit, New Opportunity.

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



The screenshot shows a tabular report titled "New Service information Report" for "Service records". The report displays a table with columns: "Rating for service", "Payment Status", "Customer Name", "Appointment Date", "Service Status", and "Payment Paid". The data is grouped by rating and payment status, with subtotals for each group. The table includes sorting and filtering options at the top. The browser interface includes a search bar, a ribbon with various icons, and a status bar at the bottom.

Rating for service	Payment Status	Customer Name	Appointment Date	Service Status	Payment Paid
3 (1)	Pending (1)	Mohan	08/08/2024	Completed	₹25,000
					₹25,000
					₹25,000
4 (4)	Pending (2)	Priya	01/08/2024	Completed	₹9,800
		Rajesh Kanna	10/07/2024	Completed	₹45,000
					₹54,800
	Completed (2)	Bunny	02/07/2024	Completed	₹1,50,000
		Madhu	21/08/2024	Completed	₹3,800
					₹1,53,800
					₹2,08,600
5 (5)	Pending (2)	Puja	24/07/2024	Completed	₹15,000
		Sandhya	05/08/2024	Completed	₹10,500

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

