

Garage Management System

GARAGE MANAGEMENT SYSTEM



SUBMITTED BY: SHAIK MOHAMMED GAFFAR ALI

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COURSE: B.TECH (AI&ML)

ROLL NO: 219Y1A3951

COLLEGE: K.S.R.M COLLEGE OF ENGINEERING

The screenshot shows a Salesforce Lightning interface for a user named Shaik MOHAMMED GAFFAR ALI. The top navigation bar includes tabs for Profile - Student, Student - Skill Wallet, New Service Informa..., SHAIK MOHAMMED, Welcome to Salesforce, Customer Review1, and New Tab. The main content area displays a profile card for Shaik MOHAMMED GAFFAR ALI, featuring a cartoon bear icon, the user's name, and a message to share awesomeness. Below this is a 'Details' section with fields for Name (Shaik MOHAMMED GAFFAR ALI), Title (Manager), Company Name (K.S.R.M COLLEGE OF ENGINEERING), Email (shaikgaffar1519@gmail.com), Address (IN), and About Me (Share your awesomeness with the world. Or at least with your colleagues on Chatter.). To the right is a 'Related' sidebar with sections for Groups (0), Files (1) containing a file named 'CAR-GARAGE-REPAIR-MANAGEMENT-SOLUTIONS', and Followers (0). The bottom of the screen shows a taskbar with various icons and system status.

STUDENT DETAILS

STUDENT NAME: SHAIK MOHAMMED GAFFAR ALI

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COURSE: B. TECH

BRANCH: ARTIFICIAL INTELLIGENCE AND MACHINE LEARNING

STUDENT ID: 219Y1A3951

YEAR: 4TH YEAR

COLLEGE: K.S.R.M. COLLEGE OF ENGINEERING, KADAPA.

Project Overview

This project is focused on developing a robust **Garage Management System (GMS)** to address the challenges associated with managing garage operations and vehicle servicing efficiently. The goal is to deliver a comprehensive solution by leveraging **Salesforce's cloud-based platform**, renowned for its customer relationship management (CRM) capabilities and powerful customization features.

Through this project, we aim to enhance **operational efficiency, customer satisfaction, and data accuracy** while supporting the long-term objectives of seamless service delivery and operational scalability for garage businesses.

The Garage Management System serves as a vital tool for automotive repair facilities, enabling them to streamline processes such as **appointment scheduling, service tracking, inventory management, and customer communication**. With its intuitive interface and tailored functionalities, GMS empowers garage owners and staff to deliver superior service while ensuring a seamless and satisfying experience for customers.

This project utilizes Salesforce's platform to integrate standard CRM features with customized functionalities specific to garage management. The system enables garage owners to:

- **Centralize customer data**, including contact details, vehicle information, service preferences, and interaction history.
- Provide **personalized services** by leveraging historical customer and vehicle data.
- Facilitate the creation and management of **work orders** based on customer requests and staff availability.
- **Monitor service progress** and inventory in real time to ensure timely service delivery.
- Generate actionable insights with **real-time analytics and reporting tools**.

The Garage Management System addresses common challenges faced by traditional management methods, such as **fragmented data handling, manual record-keeping, and inefficient workflows**. By automating repetitive tasks, centralizing data, and providing advanced reporting, the solution reduces errors, improves productivity, and enhances decision-making capabilities.

This project is adaptable and scalable, catering to the needs of both small workshops and large multi-branch service centres, making it a versatile solution in today's competitive automotive service market.

Objectives

Business Goals

Enhance Operational Efficiency:

The Garage Management System aims to automate key tasks such as appointment scheduling, service tracking, and inventory management. By leveraging Salesforce's platform, the system will streamline workflows, reduce service turnaround time, and minimize errors caused by manual processes.

Improve Customer Experience:

One of the primary goals is to enhance customer satisfaction by providing a seamless experience through transparent service updates, personalized communication, and easy access to service history. With Salesforce CRM, customers can enjoy timely notifications and a user-friendly interface for appointment booking and updates.

Optimize Resource Utilization:

The system aims to optimize resource allocation, including technician scheduling, spare parts management, and tool availability. By offering real-time insights into resource usage, the solution will help minimize downtime and improve operational productivity.

Increase Revenue Opportunities:

By automating billing, identifying upselling opportunities through customer data, and improving service accuracy, the system is designed to boost revenue. It integrates advanced tracking of services and parts, allowing garages to offer targeted recommendations and promotions to customers.

Data-Driven Decision Making:

Through Salesforce's analytics and reporting capabilities, garage managers will gain actionable insights into customer behavior, service performance, and inventory trends. This will enable strategic planning and more informed decision-making to improve overall business efficiency.

Specific Outcomes

Streamlined Service Scheduling:

- Implementation of a smart scheduling tool to manage and organize appointments effectively.
- Reduction of scheduling conflicts and last-minute cancellations.

Enhanced Customer Relationship Management (CRM):

- Centralized database for managing customer interactions, service preferences, and feedback.
- Improved personalized communication based on historical data.

Inventory and Spare Parts Management:

- Automated tracking of inventory levels with timely restocking alerts.
- Seamless integration with suppliers to manage orders and stock updates.

Real-Time Reporting and Insights:

- Creation of interactive dashboards to monitor garage operations and technician performance.
- Generation of detailed reports to support business analysis and forecasting.

Workflow Automation:

- Automation of repetitive tasks such as service reminders, invoicing, and follow-ups.
- Smart technician assignments based on skills and availability.

Secure Payment Integration:

- Integration with payment gateways to offer secure and flexible payment options.
- Support for multiple payment methods, including digital wallets and credit card payments.

User-Friendly Design:

- Development of an intuitive and mobile-friendly interface for both staff and customers.
- Enhanced accessibility for real-time updates and seamless navigation.

Cost Efficiency and Profit Maximization:

- Reduction in operational costs by automating manual tasks.
- Improved profitability through better inventory control and accurate invoicing.

Salesforce Key Features and Concepts Utilized

The Garage Management System extensively utilizes Salesforce's robust platform capabilities to ensure efficient, scalable, and user-friendly functionality. Below are the key Salesforce features and concepts employed.

Objects

What are Salesforce Objects?

Salesforce objects are the core database structures used to store data within the platform. They were critical in modeling the Garage Management System's operational framework.

Types of Objects Utilized:

1. Standard Objects:

- **Accounts:** Used to represent the garage itself or corporate clients.
- **Contacts:** Used to store customer details, including vehicle owners.
- **Cases:** Mapped to service requests or issues raised by customers.
- **Opportunities:** Represented potential upselling opportunities like additional services or parts.

2. Custom Objects:

- **Vehicles:** To store vehicle details such as make, model, registration number, and service history.
- **Service Orders:** Used to track individual garage services, including labor, spare parts, and costs.
- **Technician Assignments:** Managed technician workloads and their assigned tasks.

Tabs

Tabs acted as navigational elements to access objects and functionalities quickly.

Types of Tabs:

1. Custom Tabs:

- Enabled users to view and interact with custom objects like Vehicles and Service Orders.

2. Web Tabs:

- Integrated third-party applications like supplier inventory systems or customer feedback portals.

3. Lightning Component Tabs:

- Added custom Lightning Components, such as a "Technician Dashboard," for real-time monitoring of ongoing tasks.

The Lightning App

Custom Lightning App:

A bespoke Lightning App was developed to provide a unified interface for garage operations:

- **User-Centric Design:** Incorporated a visually appealing design with custom branding, including garage-specific logos and color themes.
- **Navigation Simplicity:** Streamlined navigation with objects like Vehicles, Service Orders, and Inventory accessible via a customizable navigation bar.
- **Utility Bar Integration:** Added tools like a service cost calculator and appointment reminders to enhance user productivity.

Fields

Fields were pivotal for capturing detailed and accurate data across objects.

Standard Fields:

- Predefined fields such as **Created By**, **Last Modified By**, and **Record Owner** were used to maintain system logs and accountability.

Custom Fields:

- Developed fields tailored to garage operations, including:
 - **Vehicle Type:** Captured the vehicle's classification, such as sedan, SUV, or motorcycle.
 - **Service Status:** Tracked the progression of service orders, e.g., Pending, In Progress, or Completed.
 - **Estimated Service Duration:** Enabled accurate scheduling and technician planning.

Validation Rules

Validation rules were implemented to ensure the accuracy and consistency of data entry. Examples include:

- Preventing the creation of duplicate customer or vehicle records.
- Enforcing mandatory fields like "Service Type" and "Vehicle Registration Number."
- Verifying that the service appointment date is not set in the past.

Profiles and Role Hierarchy

Profiles:

- Configured custom profiles for garage roles such as:
 - **Service Technicians:** Limited access to service orders assigned to them.
 - **Service Managers:** Full access to all records, including dashboards and reports.

- **Front Desk Operators:** Access to appointment scheduling and customer information.

Role Hierarchy:

- Designed a hierarchy to align data visibility with organizational structure. For instance:
 - Managers had access to all subordinate data, while technicians could only view their assignments.

Sharing Settings

Organization-Wide Defaults (OWD):

- Configured private defaults for sensitive objects like Vehicles and Service Orders.

Sharing Rules:

- Automatically extended access to service orders for teams working on joint tasks.

Manual Sharing:

- Enabled ad-hoc sharing of specific customer records with technicians.

Flows

Flows were designed to automate and optimize business processes:

- **Service Reminder Flow:** Automated email or SMS notifications to customers reminding them of upcoming appointments.
- **Post-Service Follow-Up Flow:** Triggered customer feedback requests upon service completion.
- **Inventory Update Flow:** Adjusted stock levels automatically when spare parts were consumed during service.

Apex Triggers

Apex triggers enabled custom functionality:

- **Before Triggers:**
 - Validated service data, such as ensuring accurate cost estimates before saving.
- **After Triggers:**
 - Automatically updated related records, like reducing spare part inventory upon service order completion.

Reports and Dashboards

Reports:

- **Operational Efficiency Reports:** Measured service completion times and technician productivity.
- **Inventory Reports:** Monitored spare part usage and stock levels.

- **Customer Satisfaction Reports:** Analyzed feedback trends to improve services.

Dashboards:

- Created real-time dashboards displaying key metrics like:
 - Technician performance.
 - Revenue from completed services.
 - Current service workload.

Data Security and Compliance

- Implemented Salesforce Shield to encrypt sensitive data, such as payment details and customer PII.
- Ensured GDPR compliance by limiting data retention for inactive customers and anonymizing sensitive data where required.

Integration with External Systems

- **Payment Gateway Integration:** Facilitated seamless payment processing directly within Salesforce.
- **Supplier API Integration:** Real-time synchronization with suppliers for efficient stock replenishment.

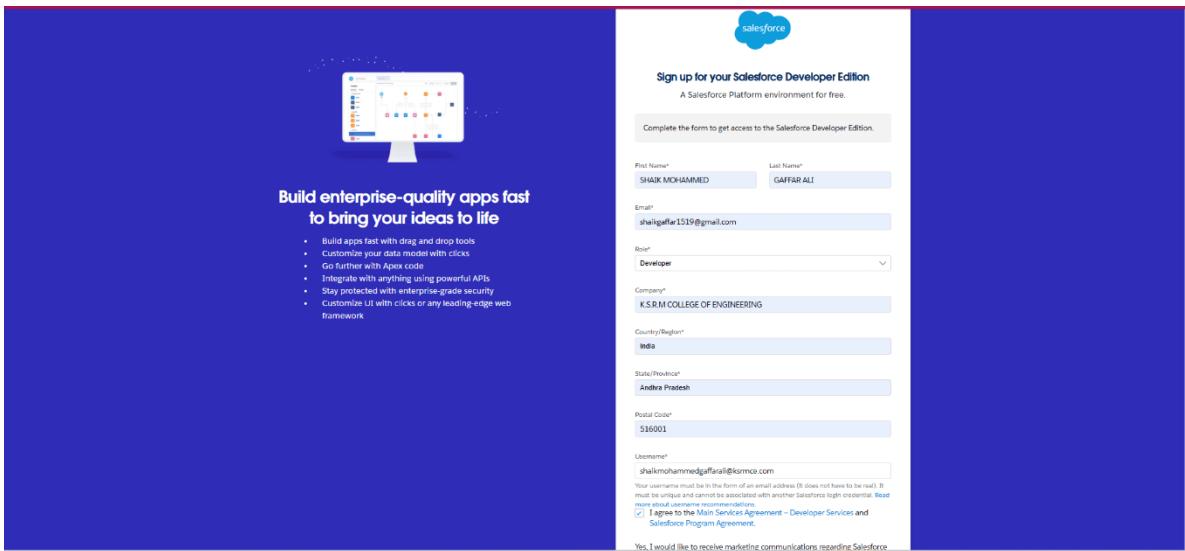
Detailed Steps to Solution Design

The solution design for the Garage Management System (GMS) was meticulously planned and executed to ensure that the platform effectively meets the business requirements. Below is a step-by-step guide that outlines the phases of design and implementation using Salesforce.

Step 1: Setting Up the Salesforce Environment

Create a Developer Account:

1. Navigate to the Salesforce Developer Signup page at <https://developer.salesforce.com/signup>.



The screenshot shows the "Sign up for your Salesforce Developer Edition" page. The page has a blue header with the Salesforce logo. Below it, there's a section titled "Build enterprise-quality apps fast to bring your ideas to life" with a list of features. The main form fields include:

- First Name*: SHAIK MOHAMMED
- Last Name*: GAFFAR ALI
- Email*: shalgaffar1519@gmail.com
- Role*: Developer
- Company*: K.S.R.I.M COLLEGE OF ENGINEERING
- Country/Region*: India
- State/Province*: Andhra Pradesh
- Postal Code*: 516001
- Username*: shalgaffar1519@gmail.com

At the bottom, there's a checkbox for accepting the "Developer Agreement" and a note about account verification.

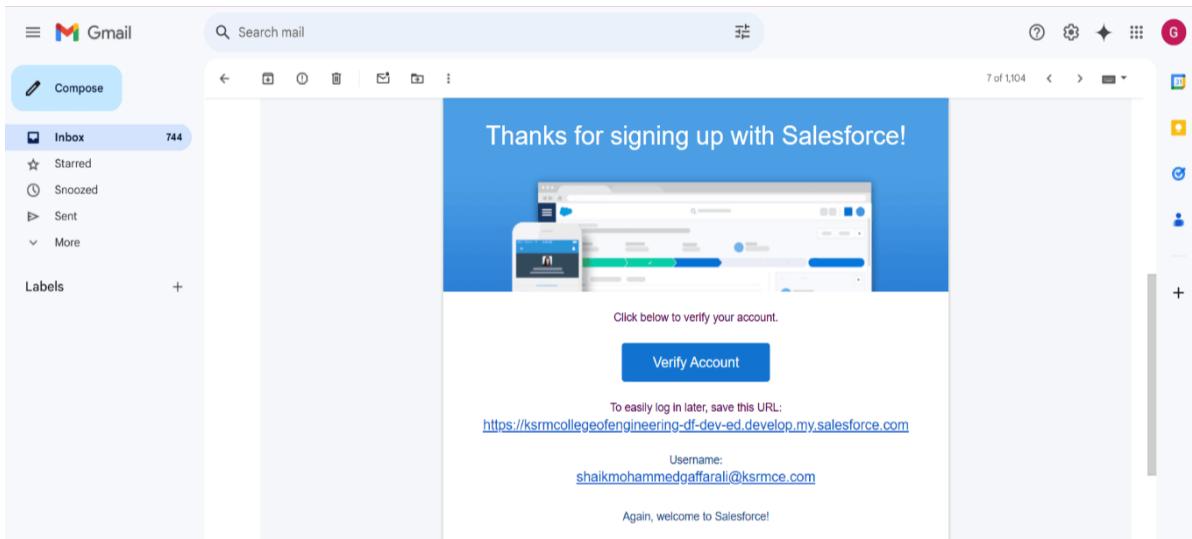
2. Fill in the required details:

- **First Name & Last Name:** Enter your full name.
- **Email Address:** Provide a valid email address.
- **Role:** Choose "Developer."
- **Company:** Use your college name or organization.
- **Country:** Select your country (e.g., India).
- **Postal Code:** Enter your area's postal code.
- **Username:** Use a combination of your name and company (e.g., username@organization.com).

3. Click **Sign Me Up** to complete the registration.

Activate Your Account:

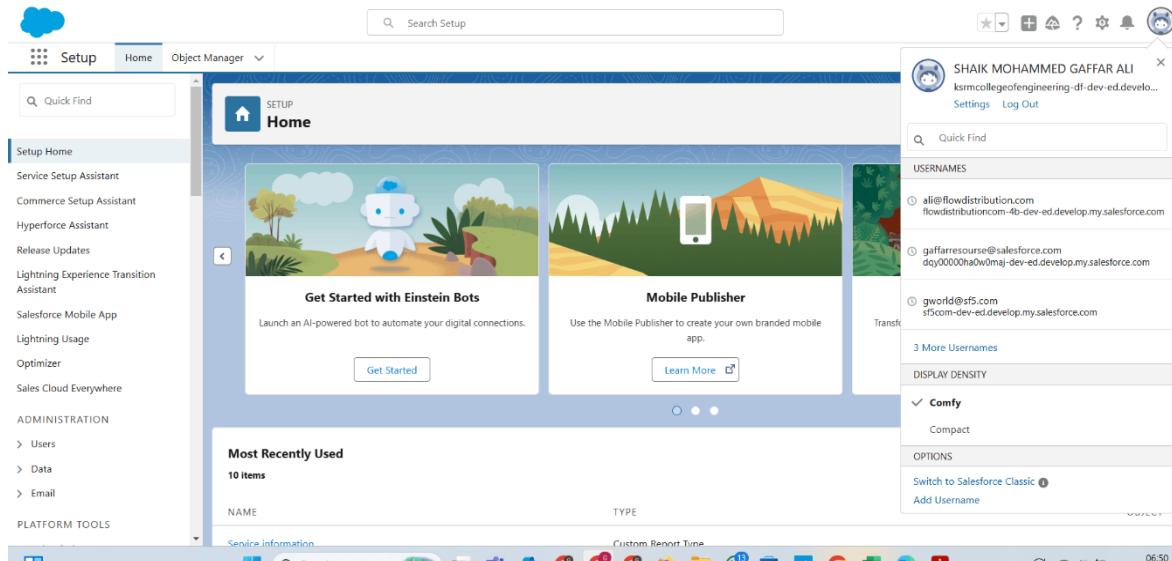
1. Check your email inbox for an account verification email.



2. Click the **Verify Account** link in the email.
3. Set a password, answer the security question, and click **Save Password**.

The screenshot shows the 'Change Your Password' page. At the top, it says 'Enter a new password for lead@sb.oom.' and 'Make sure to include at least:' with three requirements: '8 characters', '1 letter', and '1 number'. Below this is a red-bordered box containing fields for 'New Password' and 'Confirm New Password', both of which have green validation bars. Underneath is a 'Security Question' section with a dropdown menu showing 'In what city were you born?'. At the bottom is an 'Answer' field containing 'asdfghjkl' and a blue 'Change Password' button.

4. You will be redirected to your Salesforce Setup page.



Step 2: Creating Essential Objects

Build Custom Objects to Support Business Operations:

1. Customer Information Object:

- Go to **Setup > Object Manager > Create > Custom Object.**
- Set the **Label Name** to "Customer Information" and the **Plural Name** to "Customer Information Records."
- Define the **Record Name** as "Customer Name" with a **Data Type** of "Text."
- Enable **Track Field History** and **Allow Reports**.
- Save the object.

2. Appointment Object:

- From the **Object Manager**, create a new custom object.

- Label: "Vehicle Details"
- Plural Name: "Vehicles"
- Record Name: "Vehicle ID" with **Data Type** set to "Auto Number" (e.g., format veh-{000}, starting at 1).
- Enable **Track Field History** and **Allow Search**.
- Save the object.

The screenshot shows the Salesforce Setup interface with the Object Manager for the Appointment object. The Details tab is active, displaying the following configuration:

Setting	Value
Description	
API Name	Appointment__c
Singular Label	Appointment
Plural Label	Appointments
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	<input checked="" type="checkbox"/>
Track Field History	<input checked="" type="checkbox"/>
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

3. Service Order Object:

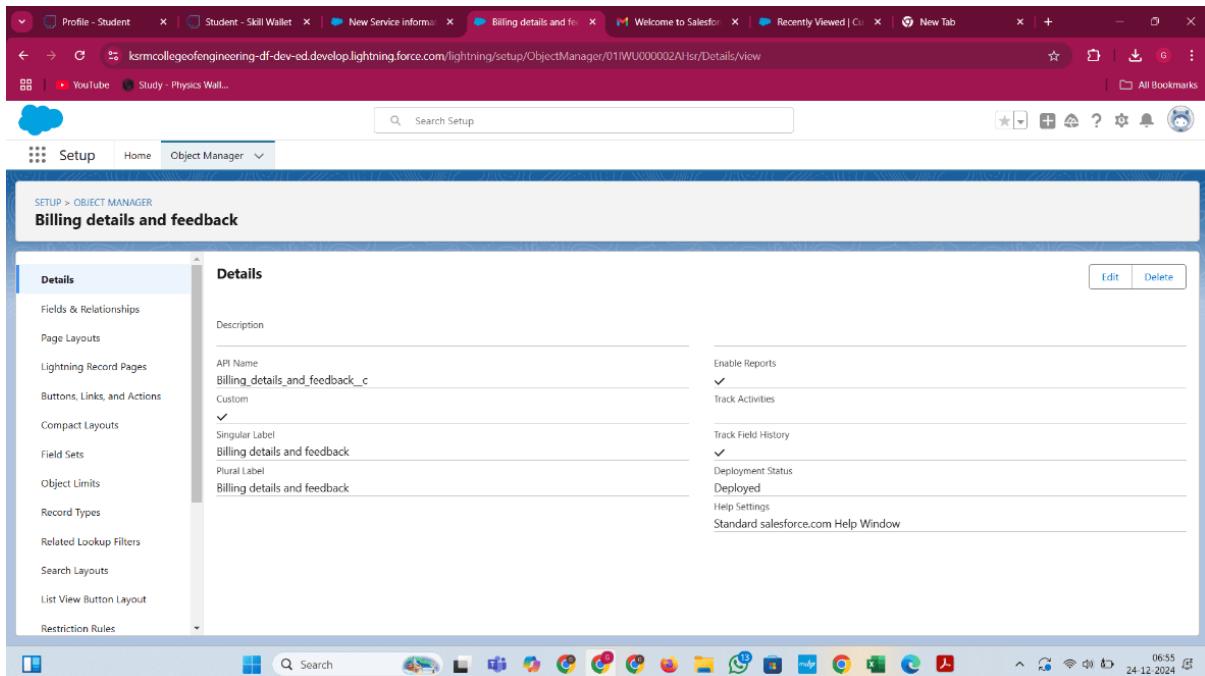
- Add a custom object labeled "Service Order."
- Plural Name: "Service Orders"
- Record Name: "Order ID" with **Auto Number** format (e.g., svc-{000}, starting at 1).
- Enable **Allow Reports** and **Track Field History**.
- Save the object.

The screenshot shows the Salesforce Setup interface under the Object Manager section. The object being edited is 'Service records'. The left sidebar lists various configuration options: 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, and Restriction Rules. The main details pane shows the API Name as 'Service_records_c', which is custom. It also displays Singular Label ('Service records') and Plural Label ('Service records'). On the right, settings like Enable Reports, Track Activities, Track Field History, Deployment Status (set to Deployed), and Help Settings are visible. At the bottom right of the details pane are 'Edit' and 'Delete' buttons. The status bar at the bottom indicates it's 06:55 on 24-12-2024.

4. Billing and Feedback Object:

- Create a new object called "Billing and Feedback."
- Plural Name: "Billing Records"
- Record Name: "Feedback ID" with **Auto Number** format (e.g., bill-{000}, starting at 1).
- Enable **Track Field History** and **Allow Search**.
- Save the object.

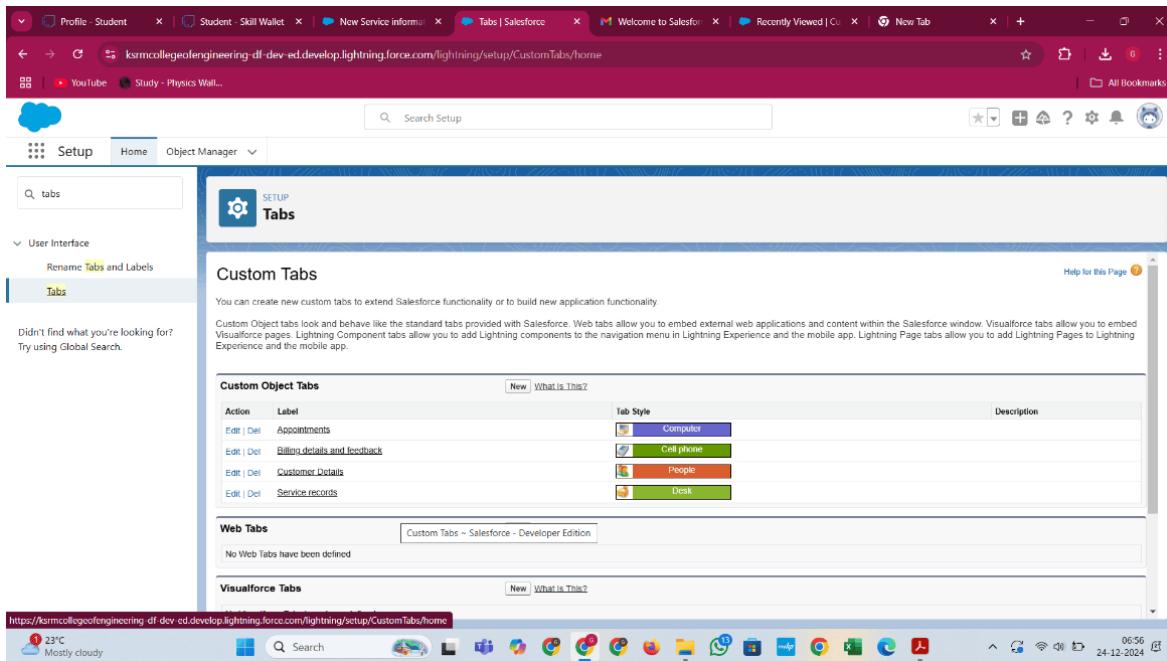
The screenshot shows the Salesforce Setup interface under the Object Manager section. The top navigation bar includes tabs for Profile - Student, Student - Skill Wallet, New Service Informa..., Object Manager, Welcome to Salesforce, Recently Viewed, and New Tab. The main content area displays the 'Object Manager' screen with a search bar and a 'Create' button. A table lists one item: 'Billing details and feedback' (Label), 'Billing_details_and_feedback_c' (API Name), 'Custom Object' (Type), and '19/12/2024' (Last Modified). The 'Deployed' column shows a checked checkbox. The status bar at the bottom indicates it's 06:55 on 24-12-2024.



Step 3: Customizing Tabs

Add Custom Object Tabs for Easy Navigation:

1. In **Setup**, search for **Tabs** in the Quick Find box.
2. Select **New** under Custom Object Tabs.
3. For each object (e.g., "Customer Information"):
 - o Select the object name.
 - o Choose a tab style from the options provided.
 - o Add the tab to appropriate user profiles by keeping the default settings.
 - o For Custom Apps, uncheck "Include Tab" to manage its availability later.
 - o Ensure the option to **Append the Tab to User's Existing Customizations** is selected.
 - o Click **Save**.
4. Repeat the process for all other objects (e.g., "Vehicles," "Service Orders," "Billing and Feedback").



Step 4: Establishing Relationships and Fields

Define Relationships Between Objects:

1. Lookup Relationships:

- Create a Lookup relationship between **Service Orders** and **Vehicles** to link specific service details to a vehicle.

2. Master-Detail Relationships:

- Establish a Master-Detail relationship between **Billing Records** and **Service Orders** to ensure billing entries are tightly linked to completed orders.

Add Custom Fields for Operational Needs:

- Add fields like **Appointment Date**, **Technician Assigned**, and **Service Status** in relevant objects to capture all necessary information.
- Use field-level security to restrict access based on roles.

Automating Business Processes:

Leverage Salesforce Automation Features:

1. Workflow Rules:

- Automate email reminders for scheduled appointments or pending payments.

2. Flows:

- Create a flow to update the status of a service order after it is completed.

Validation Rules:

- Ensure mandatory fields like "Vehicle Registration Number" are filled before saving records.
- Restrict users from creating duplicate entries based on the customer's contact number or email.

Testing and Deployment

Test the Solution:

- Test each custom object, tab, and automation in a Salesforce Sandbox environment.
- Validate relationships and ensure data integrity between objects.

Deploy to Production:

- Migrate configurations and customizations using Salesforce Change Sets.
- Conduct final testing in the production environment to verify functionality.

Step 5: Creating a Lightning App

Design a Lightning App to Enhance User Interface:

1. Navigate to **Setup** and search for **App Manager** in the Quick Find box.
2. Click on **App Manager** and select **New Lightning App**.
3. Fill in the app details:
 - o **App Name:** "Garage Management Application"
 - o Click **Next**.
4. In the **App Options** page, leave the default settings and click **Next**.
5. For **Utility Items**, leave the default settings and click **Next**.
6. Select the relevant items (e.g., "Customer Details," "Appointments," "Service Records," "Billing Details and Feedback," "Reports and Dashboards") from the search bar, then use the arrow button to move them to the selection list. Click **Next**.
7. **Assign User Profiles:**
 - o Search for and select **System Administrator** from the profiles search bar.
 - o Click the arrow button to add the profile, then click **Save & Finish**.

Lightning Experience App Manager

App Name ↑	Developer Name	Description	Last Modified ...	Ap... ↴	Vi... ↴
1 All Tabs	AllTabSet	Build CRM Analytics dashboards and apps	19/12/2024, 9:53 pm	Classic	▼
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	19/12/2024, 9:53 pm	Classic	▼
3 App Launcher	AppLauncher	App Launcher tabs	19/12/2024, 9:53 pm	Classic	▼
4 Automation	FlowsApp	Automate business processes and repetitive tasks.	19/12/2024, 9:58 pm	Lightning	▼
5 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	19/12/2024, 9:57 pm	Lightning	▼
6 Business Rules Engine	ExpressionSetConsole	Create and maintain business rules that perform complex lookups and ca...	19/12/2024, 9:53 pm	Lightning	▼
7 Community	Community	Salesforce CRM Communities	19/12/2024, 9:53 pm	Classic	▼
8 Content	Content	Salesforce CRM Content	19/12/2024, 9:53 pm	Classic	▼
9 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	19/12/2024, 9:53 pm	Lightning	▼
10 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	19/12/2024, 9:53 pm	Lightning	▼
11 Garage Management Application	Garage_Management_Application	View Adoption and Usage Metrics for Lightning Experience	19/12/2024, 10:53 pm	Lightning	▼
12 Lightning Usage App	LightningInstrumentation	Track sales and marketing efforts with CRM objects.	19/12/2024, 9:53 pm	Classic	▼

Lightning Experience App Manager

App Name ↑	Developer Name	Description	Last Modified ...	Ap... ↴	Vi... ↴
12 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	19/12/2024, 9:53 pm	Lightning	▼
13 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	19/12/2024, 9:53 pm	Classic	▼
14 Platform	Platform	The fundamental Lightning Platform	19/12/2024, 9:53 pm	Classic	▼
15 Queue Management	QueueManagement	Create and manage queues for your business.	19/12/2024, 9:53 pm	Lightning	▼
16 Sales	Sales	The world's most popular sales force automation (SFA) solution	19/12/2024, 9:53 pm	Classic	▼
17 Sales	LightningSales	Manage your sales process with accounts, leads, opportunities, and more	19/12/2024, 9:53 pm	Lightning	▼
18 Sales Console	LightningSalesConsole	(Lightning Experience) Lets sales reps work with multiple records on one ...	19/12/2024, 9:53 pm	Lightning	▼
19 Salesforce Chatter	Chatter	The Salesforce Chatter social network, including profiles and feeds	19/12/2024, 9:53 pm	Classic	▼
20 Salesforce Scheduler Setup	LightningScheduler	Set up personalized appointment scheduling.	19/12/2024, 9:56 pm	Lightning	▼
21 Service	Service	Manage customer service with accounts, contacts, cases, and more	19/12/2024, 9:53 pm	Classic	▼
22 Service Console	LightningService	(Lightning Experience) Lets support agents work with multiple records ac...	19/12/2024, 9:53 pm	Lightning	▼
23 Site.com	Sites	Build pixel-perfect, data-rich websites using the drag-and-drop Site.com ...	19/12/2024, 9:53 pm	Classic	▼
24 Subscription Management	RevenueCloudConsole	Get started automating your revenue processes	19/12/2024, 9:53 pm	Lightning	▼

Step 6: Creating Fields for Customer Details Object

Define Custom Fields for Enhanced Data Capture:

- From **Setup**, go to **Object Manager** and search for the **Customer Details** object.
- Click on the object name and select **Fields & Relationships**, then click **New**.
- For the field type, choose **Phone** and click **Next**.
- Fill out the following details:
 - **Field Label:** "Phone Number"
 - **Field Name:** This will auto-generate.

5. Click **Next**, then **Save & New** to create additional fields.

The screenshot shows the Salesforce Object Manager page. At the top, there are tabs for 'Setup' and 'Object Manager'. Below the tabs, the title 'Object Manager' is displayed with a subtitle '1 items. Sorted by Label'. A search bar at the top right contains the text 'Search Setup'. To the right of the search bar are buttons for 'Billing details and feed', 'Schema Builder', and 'Create'. The main area displays a table with one row. The columns are labeled 'LABEL', 'API NAME', 'TYPE', 'DESCRIPTION', 'LAST MODIFIED', and 'DEPLOYED'. The single row shows 'Billing details and feedback' as the label, 'Billing_details_and_feedback_c' as the API name, 'Custom Object' as the type, and '19/12/2024' as the last modified date. The 'DEPLOYED' column has a checked checkbox. The bottom of the screen shows the Windows taskbar with various pinned icons and the system tray indicating the date and time as 24-12-2024.

Add Email Field to Customer Details:

1. Repeat the previous steps, but this time select **Email** as the field type.
2. Enter the following details:
 - o **Field Label:** "Gmail"
 - o **Field Name:** This will auto-generate.
3. Click **Next**, then **Save & New** to continue adding fields.

Create Lookup Field in Appointment Object:

1. In **Object Manager**, select the **Appointment** object.
2. Click on **Fields & Relationships** and select **New**.
3. Choose the **Lookup Relationship** field type.
4. Set the relevant relationship between **Appointment** and **Customer**.

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

- Tab Bar:** Profile - Student, Student - Skill Wallet, New Service informa..., Billing details and fo..., Welcome to Salesfor..., Recently Viewed | C..., New Tab.
- Header:** karmcollegeofengineering-df-dev-ed-develop.lightning.force.com/lightning/setup/ObjectManager/01IWU000002AHs/fieldsAndRelationships/view
- Search Bar:** Search Setup
- Page Header:** Setup, Home, Object Manager
- Section:** SETUP > OBJECT MANAGER
- Section Title:** Billing details and feedback
- Left Sidebar:** Details, Fields & Relationships (selected), 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.
- Table:** Fields & Relationships (8 items, Sorted by Field Label)
 | 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) | | ✓ |

Add Checkbox, Date, Currency, Text, Picklist, and Formula Fields:

- Create a **Checkbox** field on the **Appointment** object for confirming service status.
- Add a **Date** field on the **Appointment** object for scheduling purposes.
- Create a **Currency** field on the **Appointment** object to track service cost.
- Add **Text** fields to the **Billing Details and Feedback** object to capture customer reviews.
- Create a **Picklist** field in the **Service Records** object to categorize service types.
- Define a **Formula** field in the **Service Records** object to calculate the total service cost based on variables.

Step 7: Creating Validation Rules

Establish Validation Rules to Ensure Data Integrity:

1. For the **Appointment** object:
 - In **Setup**, go to **Object Manager**, search for **Appointment** and click **Edit**.
 - In the **Validation Rules** section, click **New**.

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

- Page Title:** Validation Rules
- Section:** SETUP > OBJECT MANAGER
- Object:** Appointment
- Table Headers:** RULE NAME, ERROR LOCATION, ERROR MESSAGE, ACTIVE, MODIFIED BY
- Table Data:**

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Vehicle	Vehicle number plate	Please enter valid number	✓	SHAIK MOHAMMED GAFFAR ALI, 20/12/2024, 12:55 am
- Left Sidebar:** 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.
- Bottom Status Bar:** https://ksrmcollegeofengineering-df-dev-ed.lightning.force.com/one/one.app#/setup/ObjectManager/01IWU000002AHmP/AlohaSearchLayouts/view
- System Information:** 23°C Mostly cloudy, 06:59, 24-12-2024

- Define the validation logic, such as ensuring the **Appointment Date** is not in the past.
- Click **Save** to apply the rule.

2. For the **Billing Details and Feedback** object:

- In **Setup**, go to **Object Manager**, search for **Billing Details and Feedback**, and click **Edit**.
- In the **Validation Rules** section, click **New**.
- Set validation criteria such as ensuring **Billing Amount** is greater than zero.
- Click **Save** to finalize the rule.

Step 8: Creating Matching and Duplicate Rules

Set Up Matching Rules to Prevent Duplicate Customer Records:

1. In **Setup**, search for **Matching Rules** in the Quick Find box.
2. Click **Matching Rules**, then select **New Rule**.

3. Define the matching criteria for customer details, such as matching **Phone Number** and **Email Address** to identify duplicates.
4. Click **Save** to create the rule.

Create Duplicate Rules for Data Quality Assurance:

1. In **Setup**, search for **Duplicate Rules** in the Quick Find box.

2. Click **Duplicate Rules**, then click **New Rule**.
3. Select the **Customer Details** object.

The screenshot shows the Salesforce Duplicate Rules page. The URL is <https://krmcollegeofengineering-df-dev-ed.lightning.force.com/lightning/setup/DuplicateRules/home>. The page title is "Duplicate Rules". On the left, there's a sidebar with "Data" sections: "Duplicate Management" (selected), "Duplicate Error Logs", "Duplicate Rules" (highlighted in blue), and "Matching Rules". A search bar at the top says "Search Setup" and has a "duplicate" query. The main content area shows a table titled "All Duplicate Rules" with the following data:

Rule Name	Description	Object	Matching Rule	Active	Last Modified By	Last Modified Date
<u>Customer Detail duplicate</u>	Identify accounts that duplicate other accounts.	Customer Details	Matching customer details	<input checked="" type="checkbox"/>	SGAFF	20/12/2024
<u>Standard Account Duplicate Rule</u>	Identify contacts that duplicate other contacts and leads.	Account	Standard Account Matching Rule	<input checked="" type="checkbox"/>	SGAFF	19/12/2024
<u>Standard Contact Duplicate Rule</u>	Identify leads that duplicate other leads and contacts.	Contact	Standard Lead Matching Rule	<input checked="" type="checkbox"/>	SGAFF	19/12/2024
<u>Standard Lead Duplicate Rule</u>		Lead	Standard Contact Matching Rule	<input checked="" type="checkbox"/>	SGAFF	19/12/2024

4. Define the conditions under which duplicates are flagged, such as allowing duplicates but warning users when a record with matching details already exists.
5. Click **Save** to finalize the rule.

Step 9: Creating Manager and Salesperson Profiles

Create Customized Profiles for Different User Roles:

1. Navigate to **Setup** and type **Profiles** in the Quick Find box.
2. Click on **Profiles**, then select an existing profile (e.g., **Standard User**) to clone.
3. Give the new profile a name, such as **Manager**, and click **Save** to create the profile.

Create a Profile for Salesperson:

1. Again, go to **Setup** and type **Profiles** in the Quick Find box.
2. Click on **Profiles**, then clone the **Salesforce Platform User** profile.
3. Name the profile **Salesperson** and click **Save**.

Profiles

Action	Profile Name	User License	Custom
<input type="checkbox"/>	Analytics Cloud Integration User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/>	Analytics Cloud Security User	Analytics Cloud Integration User	<input type="checkbox"/>
<input type="checkbox"/>	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/>	Authenticated Website	Authenticated Website	<input type="checkbox"/>
<input type="checkbox"/>	B2B Recordkeeping Portal Buyer Profile	External Apps Login	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Chatter External User	Chatter External	<input type="checkbox"/>
<input type="checkbox"/>	Chatter Free User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/>	Chatter Moderator User	Chatter Free	<input type="checkbox"/>
<input type="checkbox"/>	Contract Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Cross-Org Data Proxy User	XOrg Proxy User	<input type="checkbox"/>
<input type="checkbox"/>	Custom: Marketing Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Custom: Sales Profile	Salesforce	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Custom: Support Profile	Salesforce	<input checked="" type="checkbox"/>

Profiles

Action	Profile Name	User License	Custom
<input type="checkbox"/>	salesperson	Salesforce Platform	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Salesforce API Only System Integrations	Salesforce Integration	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Silver Partner User	Silver Partner	<input type="checkbox"/>
<input type="checkbox"/>	Solution Manager	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	Standard Platform User	Salesforce Platform	<input type="checkbox"/>
<input type="checkbox"/>	Standard User	Salesforce	<input type="checkbox"/>
<input type="checkbox"/>	System Administrator	Salesforce	<input type="checkbox"/>

Step 10: Defining Roles and Role Hierarchy

Create a Manager Role and Define Role Hierarchy:

1. In **Setup**, search for **Roles** in the Quick Find box.
2. Click on **Set Up Roles**, then click **Expand All** to view the role hierarchy.
3. Under the appropriate parent role (e.g., CEO), click **Add Role**.
4. Name the new role **Manager** (the role name will auto-populate) and click **Save**.

Create Additional Roles Under the Manager Role:

1. In **Setup**, search for **Roles** again in the Quick Find box.
2. Click on **Set Up Roles**, then find the **Chief Executive Officer** role.

3. Click the plus icon next to the CEO role and add roles under **Manager** to define a clear hierarchy of subordinates.

The screenshot shows the Salesforce Setup interface under the Roles section. A sample role hierarchy is displayed, illustrating a territory-based structure. The hierarchy includes the CEO, President, CFO, VP, Sales, and various sales directors and representatives across different territories (Western, Eastern, International). Each role has specific permissions listed next to it, such as viewing forecasts and generating reports.

The screenshot shows the Salesforce Setup interface under the Roles section, specifically the 'Creating the Role Hierarchy' section. It displays a hierarchical tree structure of roles within the organization. The root node is 'K.S.R.M COLLEGE OF ENGINEERING', which branches into 'CEO', 'Manager', and several other roles like 'sales_person', 'SVP.Customer.Service & Support', 'Customer.Support.International', 'Customer.Support.North America', and 'Installation & Repair Services'. Each node has edit, delete, and assign options.

Step 11: Creating Users

Add Users to Salesforce Platform:

1. Go to **Setup**, type **Users** in the Quick Find box, and click **Users**.
2. Click **New User** to create a new user.
3. Complete the fields for the user, including:
 - o **Role:** Assign the appropriate role (e.g., **Salesperson**).
 - o **User License:** Select **Salesforce Platform**.

- **Profile:** Choose the relevant profile (e.g., **Salesperson**).
4. Click **Save** to create the user.

Repeat the process for additional users, making sure to assign each user the appropriate roles, licenses, and profiles, ensuring at least three users are created under the **Salesperson** profile.

Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/> Edit	basha_destagiri	dhash	dastagir11@qworld.com	sales person	<input checked="" type="checkbox"/>	sales person
<input type="checkbox"/> Edit	Chatter Expert	Chatter	chattv.00tww00000ewiom2al.mcwhmocycan@chatter.salesforce.com		<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/> Edit	Da_Bakash	bda	bakash@qworld.com	sales person	<input checked="" type="checkbox"/>	sales person
<input type="checkbox"/> Edit	GAFFAR ALI SHAIK MOHAMMED	SGAFF	shaikmohammedqafrak@ksrmce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/> Edit	khan_Adil	atman	adil123@gmail.com	sales person	<input checked="" type="checkbox"/>	sales person
<input type="checkbox"/> Edit	Mikaelson_Niklaus	nmika	nike@qworld.com	Manager	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/> Edit	User_Integration	inter	integration@00tww00000ewiom2al.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/> Edit	User_Security	sec	insightssecurity@00tww00000ewiom2al.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

Step 12: Creating New Public Groups

Set Up Public Groups to Manage User Access:

1. Go to **Setup** and type **Users** in the Quick Find box.
2. Click on **Public Groups**, then click **New** to create a new group.
3. Name the group **Sales Team** and define the group's settings.
4. Click **Save** to finalize the creation of the public group.

Step 13: Configuring Sharing Settings

Adjust Sharing Settings for Objects:

1. Navigate to **Setup**, and type **Sharing Settings** in the Quick Find box.
2. Select **Sharing Settings**, then click **Edit**.
3. In the **Organization-Wide Default (OWD)** settings, locate the **Service Records Object** and set its sharing model to **Private**.
4. Click **Save** to apply the changes.

The screenshot shows the Salesforce Sharing Settings page. In the 'Default Sharing Settings' section, under 'Organization-Wide Defaults', there is a table with columns: Object, Default Internal Access, Default External Access, and Grant Access Using Hierarchies. The table lists various objects like Lead, Account, Contact, Order, Asset, Opportunity, Case, Campaign, and User, each with specific sharing settings. The 'Grant Access Using Hierarchies' column contains checked boxes for most objects except for 'Asset' and 'Opportunity'.

Object	Default Internal Access	Default External Access	Grant Access Using Hierarchies
Lead	Public ReadWrite/Transfer	Private	✓
Account	Public ReadWrite	Private	✓
Contact	Controlled by Parent	Controlled by Parent	✓
Order	Controlled by Parent	Controlled by Parent	✓
Asset	Controlled by Parent	Controlled by Parent	✓
Opportunity	Public ReadWrite	Private	✓
Case	Public ReadWrite/Transfer	Private	✓
Campaign	Public Full Access	Private	✓
Campaign Member	Controlled by Campaign	Controlled by Campaign	✓
User	Public Read Only	Private	✓

Step 14: Creating a Flow

Create a Record-Triggered Flow:

1. In **Setup**, type **Flow** in the Quick Find box, and select **Flows**.
2. Click on **New Flow**, then choose **Record-Triggered Flow**.
3. Click **Create** to start the flow design process.
4. Define the trigger conditions and flow logic as per the requirements of the project.

The screenshot shows two instances of the Salesforce Flows setup page. The top instance displays a list of flows under 'Process Automation' with categories like 'Flows' and 'Identity'. It includes a search bar, a sidebar with 'Object Manager', and a 'Flow Trigger Explorer' tab. The bottom instance shows the 'Billing Amount Flow' in the flow builder, which is a record-triggered flow for 'Billing details and feedback' triggered by 'A record is created or updated'. The flow consists of three steps: 'Amount Update', 'Email Alert', and 'End'. The toolbar at the top of the flow builder includes 'select Elements', 'Run', 'Debug', 'View Tests', 'Save As New Version', 'Save', and 'Deactivate'.

Step 15: Apex Handler for Amount Distribution

Use Case: This Apex handler is designed to manage the distribution of amounts based on the services selected for the vehicle.

Creating the Apex Class:

1. Log in to your **Trailhead account** and click on the gear icon in the top-right corner.
2. Select **Developer Console** to open the console window.
3. In the toolbar, click on **File**, then select **New** and click **Apex Class**.
4. Name the class **AmountDistributionHandler** and write the required logic for handling the amount distribution.
5. Click **Save** once the code is written.

- After saving, click **Run All** to execute the class.

Creating the Trigger for Amount Distribution:

- Open the **Developer Console** by clicking the gear icon again in your **Trailhead account**.
- In the console, click **File**, then **New** and select **Trigger**.
- Name the trigger **AmountDistribution** and select the **Appointment** object as the target for this trigger.
- Write the necessary trigger logic for amount distribution based on the selected services.
- Click **Save**, then **Run All** to execute the trigger.

The screenshot shows the Salesforce Setup Home page. It features three main cards: "Get Started with Einstein Bots", "Mobile Publisher", and "Real-time Collaborative Docs". Below these cards is a section titled "Most Recently Used" which lists the following items:

NAME	TYPE	OBJECT
Billing details and feedback	Custom Object Definition	Billing details and feedback
rating_should_be_less_than_5	Validation Rule	
Appointment	Custom Object Definition	Billing details and feedback

At the bottom of the page, there is a developer console window titled "AmountDistributionHandler.apfc" showing the Apex code for the trigger:

```

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 }

```

The developer console also displays tabs for Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The Tests tab is currently selected, showing a status of "Test Run" and an overall code coverage of 0%.

Developer Console - Google Chrome
krmcollegeofengineering-df-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File Edit Debug Test Workspace Help < >
AmountDistributionHandler.apxc AmountDistribution.apxt

Code Coverage: None API Version 62 Go To

```
1 public class AmountDistributionHandler {  
2  
3  
4  
5 public static void amountDist(list<Appointment__c> listApp){  
6  
7     list<Service__records__c> serList = new list <Service__records__c>();  
8  
9  
10    for(Appointment__c app : listApp){  
11        if(app.Maintenance_Service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){  
12            app.Service_Amount__c = 10000;  
13        }  
14  
15        else if(app.Maintenance_Service__c == true && app.Repairs__c == true){  
16  
17            app.Service_Amount__c = 5000;  
18        }  
19    }  
20  
21    app.Service_Amount__c = 5000;  
22  
23    }  
24  
25    else if(app.Maintenance_Service__c == true && app.Replacement_Parts__c == true){  
26        app.Service_Amount__c = 8000;  
27    }  
28  
29    else if(app.Repairs__c == true && app.Replacement_Parts__c == true){  
30        app.Service_Amount__c = 7000;  
31    }  
32  
33    else if(app.Maintenance_Service__c == true){  
34        app.Service_Amount__c = 2000;  
35    }  
36  
37    else if(app.Repairs__c == true){  
38        app.Service_Amount__c = 3000;  
39    }  
40  
41    }  
42  
43    else if(app.Repairs__c == true){  
44        app.Service_Amount__c = 3000;  
45    }  
46  
47    }  
48  
49    else if(app.Replacement_Parts__c == true){  
50        app.Service_Amount__c = 5000;  
51    }  
52  
53    }  
54  
55  
56    }  
57  
58    }  
59  
60}
```

Logs Tests Checkpoints Query Editor View State Progress Problems

Status	Test Run	Enqueued Time	Duration	Failures	Total
Overall Code Coverage					
Class	Percent	Lines			
Overall	0%				
AmountDistribution	0%	0/2			
AmountDistributionHandler	0%	0/17			

23°C Mostly cloudy Search 07:19 24-12-2024

Developer Console - Google Chrome
krmcollegeofengineering-df-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File Edit Debug Test Workspace Help < >
AmountDistributionHandler.apxc AmountDistribution.apxt

Code Coverage: None API Version 62 Go To

```
21    app.Service_Amount__c = 5000;  
22  
23    }  
24  
25    else if(app.Maintenance_Service__c == true && app.Replacement_Parts__c == true){  
26        app.Service_Amount__c = 8000;  
27    }  
28  
29    else if(app.Repairs__c == true && app.Replacement_Parts__c == true){  
30        app.Service_Amount__c = 7000;  
31    }  
32  
33    else if(app.Maintenance_Service__c == true){  
34        app.Service_Amount__c = 2000;  
35    }  
36  
37    else if(app.Repairs__c == true){  
38        app.Service_Amount__c = 3000;  
39    }  
40  
41    }  
42  
43    else if(app.Repairs__c == true){  
44        app.Service_Amount__c = 3000;  
45    }  
46  
47    }  
48  
49    else if(app.Replacement_Parts__c == true){  
50        app.Service_Amount__c = 5000;  
51    }  
52  
53    }  
54  
55  
56    }  
57  
58    }  
59  
60}
```

Logs Tests Checkpoints Query Editor View State Progress Problems

Status	Test Run	Enqueued Time	Duration	Failures	Total
Overall Code Coverage					
Class	Percent	Lines			
Overall	0%				
AmountDistribution	0%	0/2			
AmountDistributionHandler	0%	0/17			

Developer Console - Google Chrome
krmcollegeofengineering-df-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File Edit Debug Test Workspace Help < >
AmountDistributionHandler.apxc AmountDistribution.apxt

Code Coverage: None API Version 62 Go To

```
41    }  
42  
43    else if(app.Repairs__c == true){  
44        app.Service_Amount__c = 3000;  
45    }  
46  
47    }  
48  
49    else if(app.Replacement_Parts__c == true){  
50        app.Service_Amount__c = 5000;  
51    }  
52  
53    }  
54  
55  
56    }  
57  
58    }  
59  
60}
```

Logs Tests Checkpoints Query Editor View State Progress Problems

Status	Test Run	Enqueued Time	Duration	Failures	Total
Overall Code Coverage					
Class	Percent	Lines			
Overall	0%				
AmountDistribution	0%	0/2			
AmountDistributionHandler	0%	0/17			

Step 16: Creating and Managing Reports

Creating a Report Folder:

1. From the **App Launcher**, search for and select **Reports**.
2. Click on the **Reports** tab, then click **New Folder** to create a new folder.
3. Name the folder appropriately (e.g., **Garage Management Reports**) and click **Save**.

Sharing a Report Folder:

1. Go to the **Reports** tab and select the newly created folder (e.g., **Garage Management Reports**).
2. Click on the drop-down menu next to the folder name and select **Share**.
3. In the **Share With** field, choose **Roles**, then search for the **Manager** role.
4. Set the access level to **View**, then click **Share** and **Done**.

Creating a Custom Report Type:

1. In **Setup**, search for **Report Types** in the Quick Find box and select **Report Types**.
2. Click **New Custom Report Type**, then select **Customer Details** as the primary object.
3. Set the **Report Type Label** as **Service Information** and let the **Report Type Name** auto-populate.
4. Enter a description and select **Other Reports** as the category.
5. Set the **Deployment Status** to **Deployed**, then click **Next**.
6. In the **Related Object** section, click **Select Object** and choose the **Appointment** object.
7. Click **Save** to create the custom report type.

Creating a New Report:

1. From the **Reports** tab, click **New Report** to create a new report.
2. Select the **Service Information** report type created earlier, then design the report as per your requirements.
3. Click **Save & Run** to finalize the report.

Screenshot of a web browser showing two tabs related to Salesforce Reports.

Top Tab: <https://krmcollegeofengineering-df-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=userFolders>

This tab displays a list of reports and folders. The table shows the following data:

REPORTS	Name	Created By	Created On	Last Modified By	Last Modified Date
Recent	Einstein Bot Reports	Automated Process	19/12/2024, 9:53 pm	Automated Process	19/12/2024, 9:53 pm
Created by Me	Einstein Bot Reports Spring '23	Automated Process	19/12/2024, 9:53 pm	Automated Process	19/12/2024, 9:53 pm
Private Reports	Einstein Bot Reports Summer '23	Automated Process	19/12/2024, 9:53 pm	Automated Process	19/12/2024, 9:53 pm
Public Reports	Einstein Bot Reports Summer '22	Automated Process	19/12/2024, 9:53 pm	Automated Process	19/12/2024, 9:53 pm
All Reports	Einstein Bot Reports Winter '23	Automated Process	19/12/2024, 9:53 pm	Automated Process	19/12/2024, 9:53 pm
All Folders	Enablement Dashboard Reports Spring '24	Automated Process	19/12/2024, 9:53 pm	Automated Process	19/12/2024, 9:53 pm
FOLDERS	Enablement Dashboard Reports Summer '24	Automated Process	19/12/2024, 9:53 pm	Automated Process	19/12/2024, 9:53 pm
All Folders	Garage Management Folder	SHAIK MOHAMMED GAFFAR ALI	20/12/2024, 12:42 pm	SHAIK MOHAMMED GAFFAR ALI	20/12/2024, 12:42 pm

A context menu is open over the "Garage Management Folder" row, showing options: Favorite, Share, Rename, and Delete.

Bottom Tab: <https://krmcollegeofengineering-df-dev-ed.develop.lightning.force.com/lightning/setup/CustonReportTypes/home>

This tab displays the "Report Types" setup page. The sidebar shows the following navigation:

- Feature Settings
- Analytics
- Reports & Dashboards
 - Access Policies
 - Historical Trending
 - Report Types
 - Reporting Snapshots
 - Reports and Dashboards
 - Settings
- Security
- Guest User Sharing Rule Access Report

The main content area is titled "Custom Report Types" and includes a diagram illustrating relationships between objects A, B, C and a report type.

The screenshot shows a report titled "Report Service Information" with a sub-section "New Service information Report". It displays a bar chart titled "PERFORMANCE" showing the sum of payment paid against rating from 0 to 5. Below the chart is a table of service details:

Customer Name	Appointment Date	Service Status	Payment Paid
1 Mac	19/12/2024	Completed	₹5,000
2 Abdullah	19/12/2024	-	₹2,000
3 Abdullah	19/12/2024	Completed	₹2,000
4 Ibn Abdullah	19/12/2024	Completed	₹10,000
5			₹19,000

At the bottom, there are checkboxes for Row Counts, Detail Rows, Grand Total, and Stacked Summaries, along with a search bar and system status indicators.

Step 17: Creating and Managing Dashboards

Creating a New Dashboard Folder:

1. Open the **App Launcher** and search for **Dashboards**.
2. Click on the **Dashboards** tab, then click **New Folder**.
3. Name the folder **Service Rating Dashboard** and click **Save**.

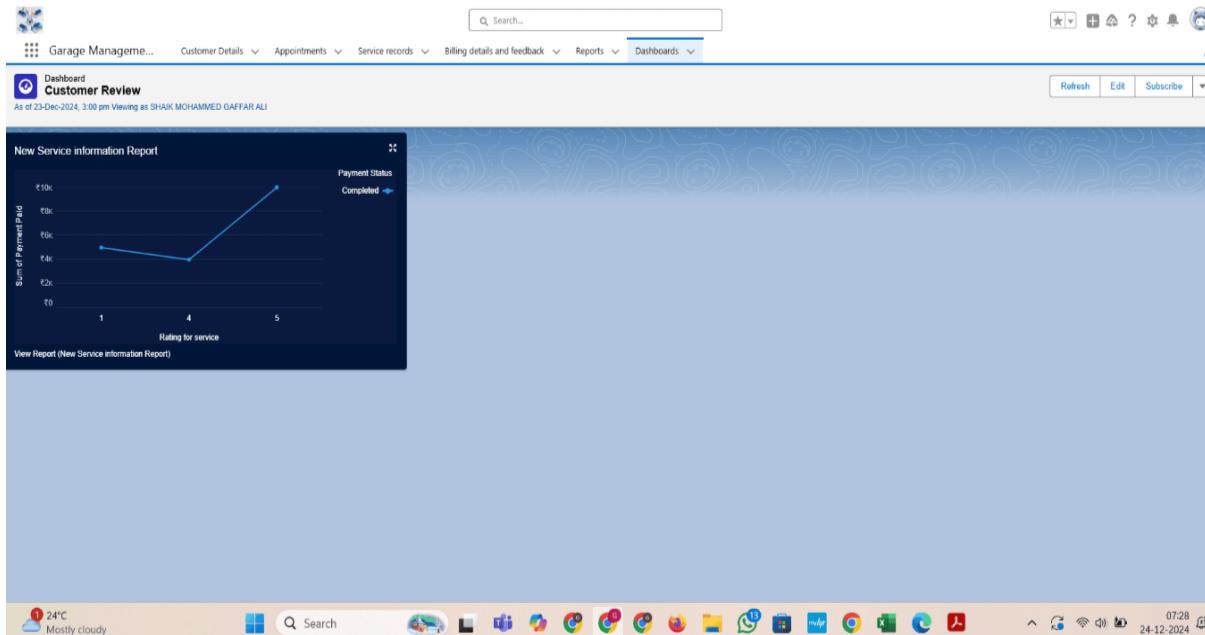
The screenshot shows the Salesforce Lightning interface with the URL "ksrmcolllegeofengineering-df-dev-ed.lightning.force.com/lightning/o/". The left sidebar shows navigation options like Dashboards, All Folders, and Favorites. The main area displays a list of dashboard folders:

Name	Created By	Created On	Last Modified By	Last Modified Date
Enablement Dashboard Spring '24	Automated Process	19/12/2024, 9:53 pm	Automated Process	19/12/2024, 9:53 pm
Enablement Dashboard Summer '24	Automated Process	19/12/2024, 9:53 pm	Automated Process	19/12/2024, 9:53 pm
Service Rating dashboard	SHAIK MOHAMMED GAFFAR ALI	20/12/2024, 1:06 pm	SHAIK MOHAMMED GAFFAR ALI	20/12/2024, 1:06 pm

At the bottom, there are checkboxes for Search all folders, New Dashboard, and New Folder, along with a search bar and system status indicators.

Creating a New Dashboard:

1. Click on the **Dashboards** tab, then click **New Dashboard**.
2. Select the **Service Rating Dashboard** folder, name the dashboard accordingly, and define the components to include (e.g., graphs, charts).
3. Click **Save** to create and save the new dashboard.



Testing and Validation

The testing and validation phase is vital in ensuring that all components of the Garage Management System (GMS) on Salesforce work as intended. This phase involves both **Unit Testing** for Apex classes and triggers and **User Interface (UI) Testing** for end-user functionality. Below is a detailed explanation of the approach to testing, covering each critical area to verify the solution's integrity.

Step 1: Unit Testing for Apex Classes (Apex Handler)

Use Case: This test is designed to validate the amount distribution logic for each service selected by the customer for their vehicle.

1. **Log into the Trailhead account** and click on the gear icon in the upper-right corner.
 2. Select **Developer Console** from the dropdown menu to open a new console window.
 3. From the **File** menu, select **New > Apex Class**.
 4. Name the class **AmountDistributionHandler**, then write the logic for the class to handle amount distribution based on selected services.
 5. Click **Save** to save the class.
 6. To run the test, click **Run All** to execute the unit test and ensure the correct functionality.

Developer Console - Google Chrome

File Edit Debug Test Workspace Help < >

AmountDistributionHandler.apxc AmountDistribution.apxt

Code Coverage: None API Version: 62 Go To

```
1 public class AmountDistributionHandler {  
2  
3  
4  
5     public static void amountDist(list<Appointment__c> listApp){  
6  
7         list<Service_records__c> serList = new list <Service_records__c>();  
8  
9     }  
10  
11     for(Appointment__c app : listApp){  
12  
13         if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){  
14  
15             app.Service_Amount__c = 10000;  
16  
17         }  
18  
19     else if(app.Maintenance_service__c == true && app.Repairs__c == true){  
20  
21  
22  
23  
24  
25  
26  
27  
28  
29  
30  
31  
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```

```

1 app.Service_Amount__c = 5000;
2 }
3
4 else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
5
6     app.Service_Amount__c = 8000;
7 }
8
9 else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
10
11     app.Service_Amount__c = 7000;
12 }
13
14 else if(app.Maintenance_service__c == true){
15
16     app.Service_Amount__c = 2000;
17 }
18
19
20
21
22
23
24
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26
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```

Overall Code Coverage		
Class	Percent	Lines
Overall	0%	0/2
AmountDistribution	0%	0/2
AmountDistributionHandler	0%	0/17


```

1 else if(app.Repairs__c == true){
2
3     app.Service_Amount__c = 3000;
4 }
5
6 else if(app.Replacement_Parts__c == true){
7
8     app.Service_Amount__c = 5000;
9 }
10
11
12
13
14
15
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21
22
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```

Overall Code Coverage		
Class	Percent	Lines
Overall	0%	0/2
AmountDistribution	0%	0/2
AmountDistributionHandler	0%	0/17

Step 2: Unit Testing for Triggers

Use Case: This trigger will handle the distribution of amounts when an appointment record is created or updated.

1. Open the **Developer Console** by clicking the gear icon and selecting **Developer Console**.
2. In the console, go to **File > New > Trigger**.
3. Name the trigger **AmountDistribution** and select the **Appointment** object to be triggered.
4. Write the trigger code to apply the logic related to amount distribution.

5. Click **Save**, then select **Run All** to execute the trigger and validate that the trigger logic works as expected.

The screenshot shows the Salesforce Developer Console in Google Chrome. The URL is ksrmcollegeofengineering-df-dev-ed-develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage. The trigger code is displayed:

```

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 }

```

The tabs at the bottom show 'Logs', 'Tests' (which is selected), 'Checkpoints', 'Query Editor', 'View State', 'Progress', and 'Problems'. The 'Tests' tab displays the following results:

Status	Test Run	Enqueued Time	Duration	Failures	Total	Overall Code Coverage
						0%
						Class Overall 0% 0/2
						AmountDistribution 0% 0/2
						AmountDistributionHandler 0% 0/17

The system status bar at the bottom shows '24°C Mostly cloudy', the date '24-12-2024', and the time '07:30'.

Step 3: UI Testing for Customer Details Object

To ensure the **Customer Details** object is correctly capturing user inputs:

1. Open the **App Launcher** located on the left side of the screen.
2. Type and search for **Garage Management System** and click on it.
3. Click on the **Customer Details** tab.
4. Click **New** to create a new customer record.
5. Fill in the required fields (e.g., Name, Contact Number) and click **Save** to verify if the record is successfully created.

The screenshot shows the Salesforce Lightning interface in a web browser. The URL is ksrmcollegeofengineering-df-dev-ed-develop.lightning.force.com/lightning/o/Customer_Details__c/list?filterName=_Recent. The page title is 'Customer Details' under the 'Recently Viewed' tab. The sidebar includes links for 'Customer Details', 'Appointments', 'Service records', 'Billing details and feedback', 'Reports', and 'Dashboards'.

The main content area shows a list of customer records:

Customer Name
1 Mac
2 Chan Basha
3 Abdullah
4 ibn abdullah

A sidebar on the right shows the user profile 'SHAIK MOHAMMED GAFFAR ALI' and a list of recent logins:

- ali@flowdistribution.com flowdistributioncom-df-dev-ed-develop.my.salesforce.com
- gaffarresource@salesforce.com dep0000chachiq-df-dev-ed-develop.my.salesforce.com
- geowrid@df5.com df5com-dev-ed-develop.my.salesforce.com

Other sidebar options include 'Quick Find', 'Usernames', 'DISPLAY DENSITY' (set to 'Comfy'), 'OPTIONS', 'Switch to Salesforce Classic', and 'Add Username'.

New Customer Details

Information

* = Required Information

Customer Name: Shahid bhai

Phone number: 7755331166

Email: shahidmia55@gmail.com

Owner: SHAIK MOHAMMED GAFFAR ALI

Shahid bhai

Related Details

Customer Name: Shahid bhai

Phone number: 7755331166

Email: shahidmia55@gmail.com

Created By: SHAIK MOHAMMED GAFFAR ALI - 24/12/2024, 7:33 am

Last Modified By: SHAIK MOHAMMED GAFFAR ALI - 24/12/2024, 7:33 am

Owner: SHAIK MOHAMMED GAFFAR ALI

Chan Basha

Related Details

Customer Name: Chan Basha

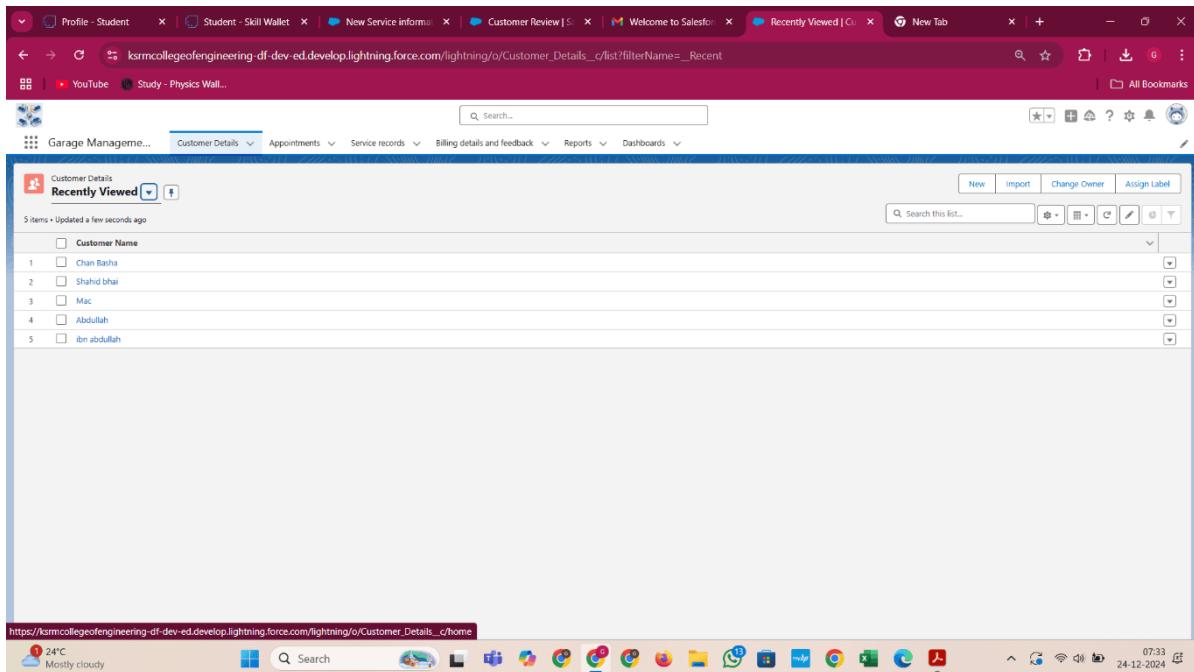
Phone number: 123987456

Email: abdullah@gmail.com

Created By: SHAIK MOHAMMED GAFFAR ALI - 20/12/2024, 7:03 am

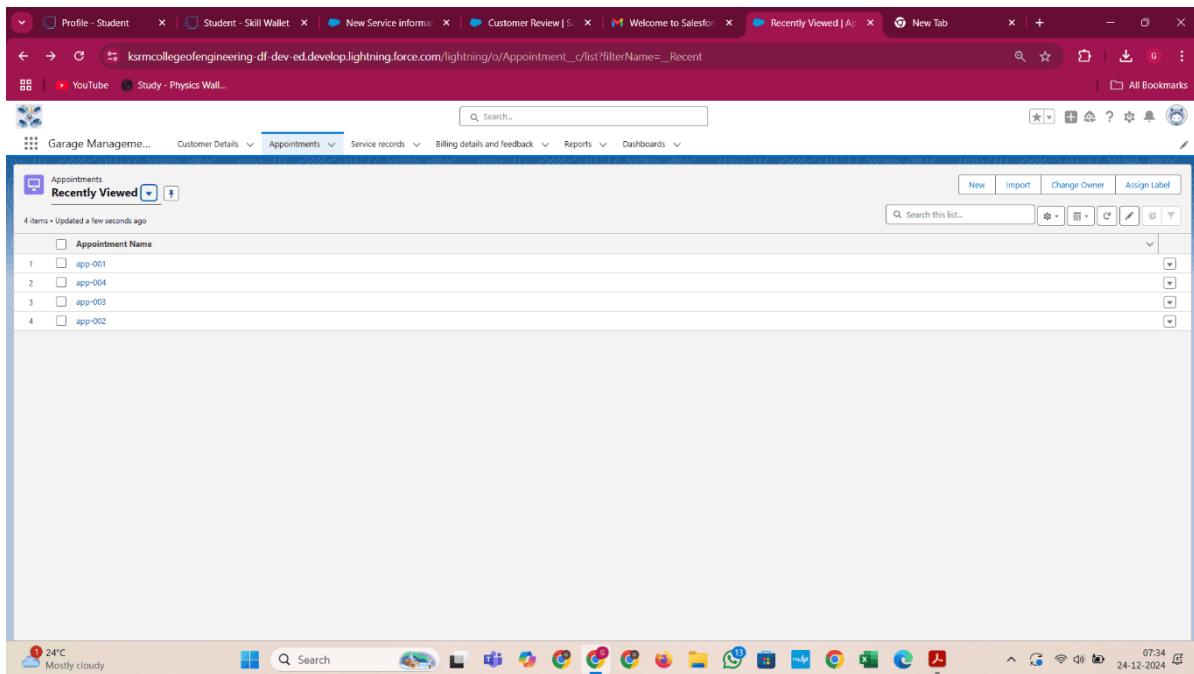
Last Modified By: SHAIK MOHAMMED GAFFAR ALI - 20/12/2024, 7:03 am

Owner: SHAIK MOHAMMED GAFFAR ALI



Step 4: UI Testing for Appointment Object

1. Click on the **Appointments** tab.
2. Enter the customer details from the **Customer Details** object, and ensure to input the **Appointment Date** as a past date to test the validation.
3. Test the **Vehicle Number Plate** validation by entering incorrect details and checking for error messages.
4. Select services and click **Save** to validate if the **Service Amount** is calculated correctly.



Screenshot of a web browser showing a Salesforce Lightning interface for an appointment record.

The browser tabs include: Profile - Student, Student - Skill Wallet, New Service Inform..., Customer Review | S..., Welcome to Salesfor..., app 002 | Appointm..., New Tab, YouTube, Study - Physics Wall..

The main page title is: ksmcollegeofengineering-df-dev-ed.lightning.force.com/lightning/r/Appointment_c/a01WU00000ag131YAA/view

The page header includes: Garage Management..., Customer Details, Appointments, Service records, Billing details and feedback, Reports, Dashboards.

The main content area shows the "Appointment app-002" record:

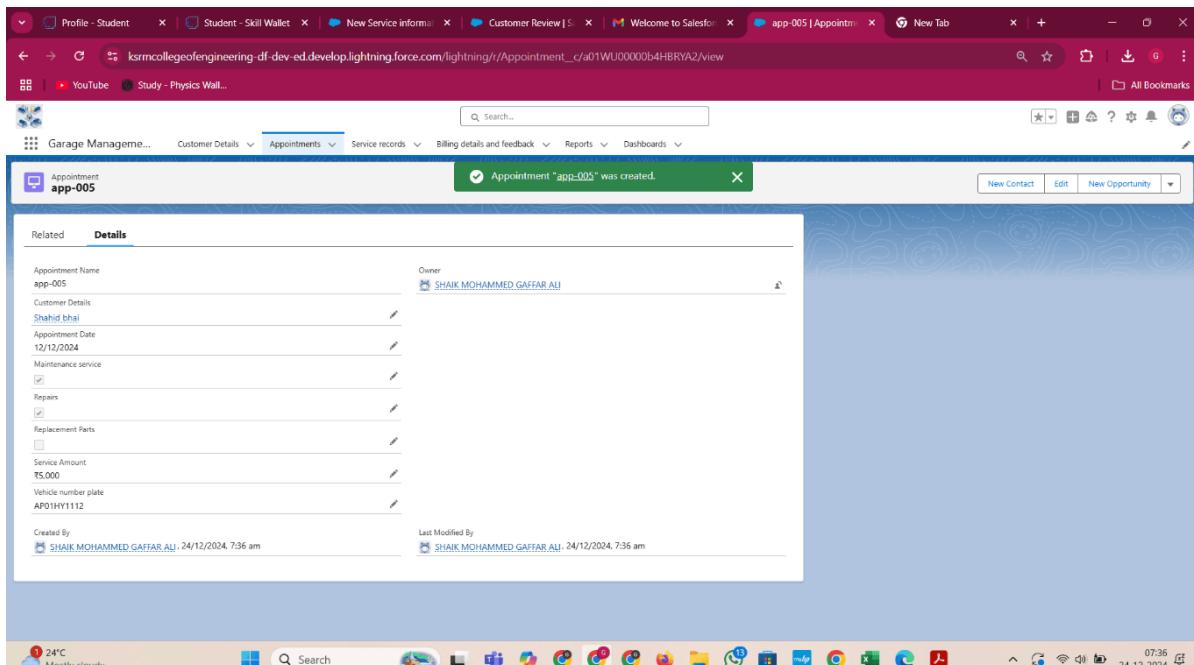
Field	Value
Appointment Name	app-002
Customer Details	Chan Bashe
Appointment Date	15/12/2024
Maintenance service	<input checked="" type="checkbox"/> Repairs <input type="checkbox"/> Replacement Parts
Service Amount	Rs.0.00
Vehicle number plate	AP01HY9955

Owner: SHAIK MOHAMMED GAFFAR ALI

Created By: SHAIK MOHAMMED GAFFAR ALI, 20/12/2024, 12:57 pm

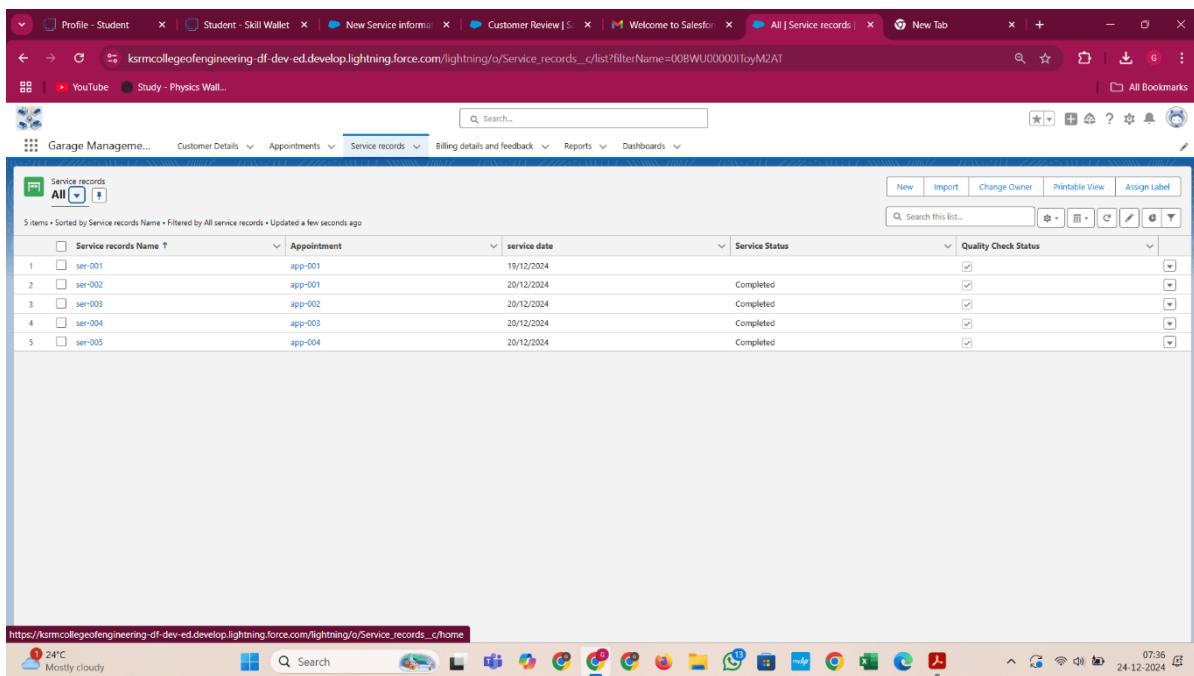
Last Modified By: SHAIK MOHAMMED GAFFAR ALI, 20/12/2024, 12:57 pm

Bottom status bar: 24°C Mostly cloudy, Search, Taskbar icons, 07:34, 24-12-2024



Step 5: UI Testing for Service Records Object

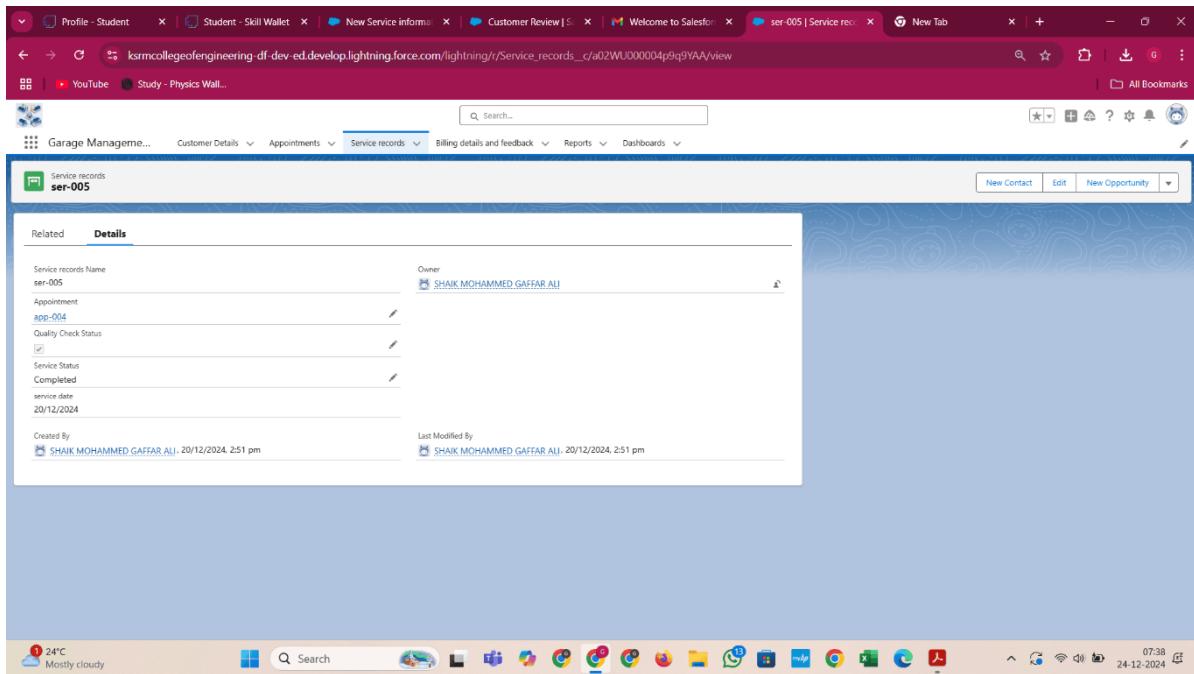
1. Navigate to the **Service Records** tab.
2. Create a new **Service Record** by entering the relevant **Appointment** details, which should be selected by default.
3. Click **Save**, then open the record to check if the **Quality Check Status** can be updated to **True**.
4. After saving the record, verify if the **Service Status** changes to **Completed** automatically.



This screenshot shows the 'Details' tab of a Service Record in Salesforce. The record is named 'ser-003'. The owner is listed as 'SHAIK MOHAMMED GAFFAR ALI'. The service date is '20/12/2024'. The status is 'Completed'. The record was created by 'SHAIK MOHAMMED GAFFAR ALI' on 20/12/2024 at 12:58 pm and last modified by the same user at the same time.

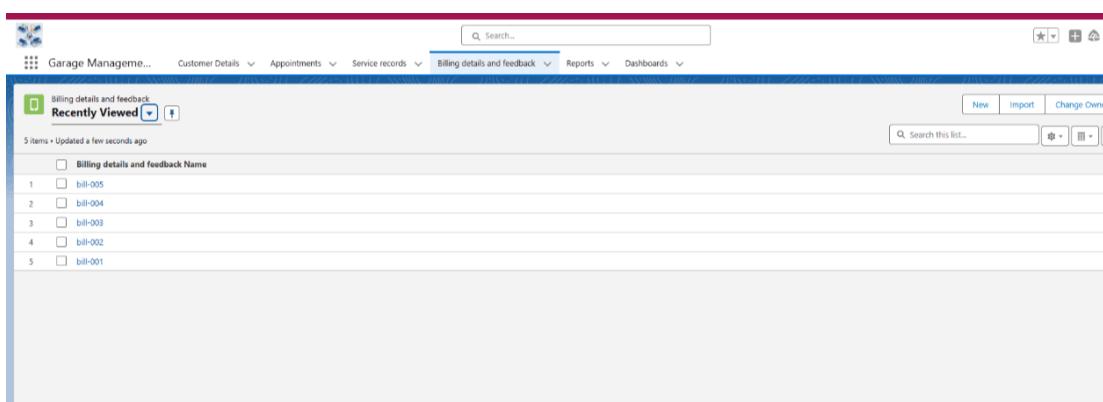
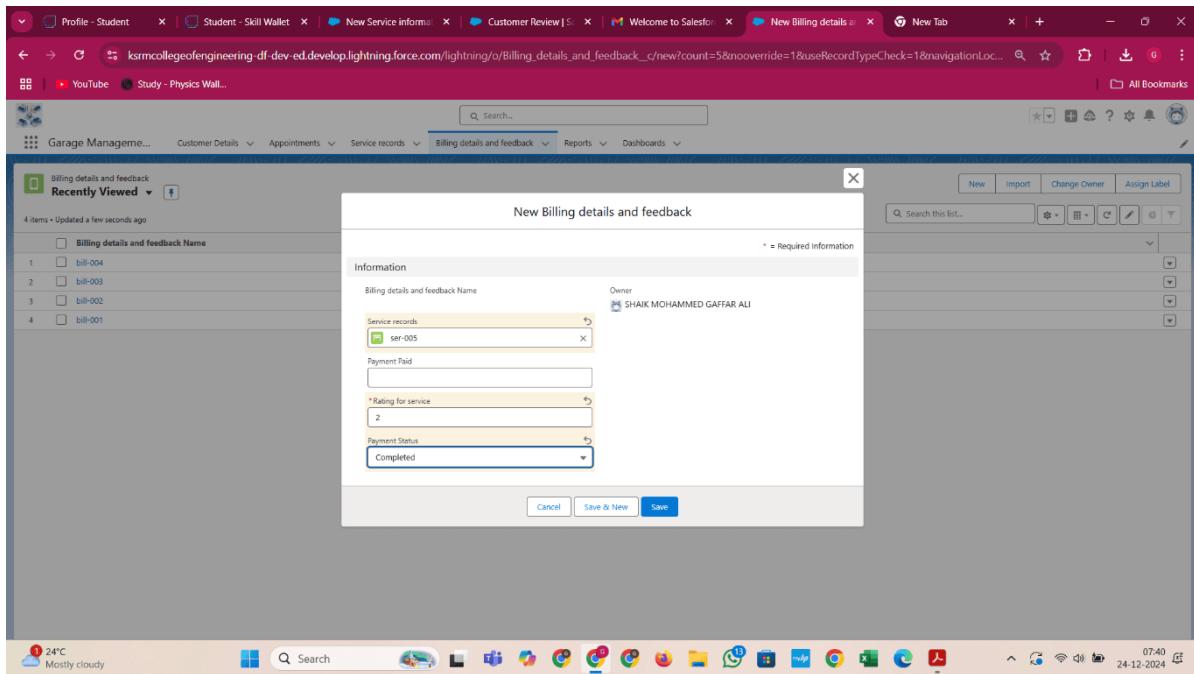
This screenshot shows the 'Details' tab of a Service Record in Salesforce. The record is named 'ser-001'. The owner is listed as 'SHAIK MOHAMMED GAFFAR ALI'. The service date is '19/12/2024'. A modal window is open, displaying the contact information for 'SHAIK MOHAMMED GAFFAR ALI', including the company name 'KSJRM COLLEGE OF ENGINEERING' and the status 'Active'. The record was created by 'SHAIK MOHAMMED GAFFAR ALI' on 20/12/2024 at 1:07 am and last modified by the same user at the same time.

This screenshot shows the 'Details' tab of a Service Record in Salesforce. The record is named 'ser-001'. The owner is listed as 'SHAIK MOHAMMED GAFFAR ALI'. The service date is '19/12/2024'. The status is 'Completed'. The record was created by 'SHAIK MOHAMMED GAFFAR ALI' on 20/12/2024 at 1:07 am and last modified by the same user at the same time.



Step 6: UI Testing for Billing Details and Feedback Object

1. Open the **Billing Details and Feedback** tab.
2. Enter the customer's billing details, including the service ratings.
3. Click **Save**, then **New**, to ensure the system can handle multiple records.



The screenshot shows a web browser window with multiple tabs open. The active tab is for a Salesforce Lightning application. The URL is https://ksrmcollegeofengineering-df-dev-ed.lightning.force.com/lightning/r/Billing_details_and_feedback_c/a03WU00000AyS0TYAV/view. The page title is "Billing details and feedback bill-001". The main content area shows a "Details" section with fields for Billing details and feedback Name (bill-001), Service records (ser-001), Payment Paid (\$2,000), Rating for service (4), and Payment Status (Completed). The Owner is listed as SHAIK MOHAMMED GAFFAR ALI. A note at the bottom indicates the record was last modified by SHAIK MOHAMMED GAFFAR ALI on 20/12/2024, 12:41 pm.

Step 7: UI Testing for Reports

1. Click on the **Reports** tab.
2. Click **New Report** and select **Service Information** from the **Other Reports** category.
3. Drag and drop the fields **Customer Name**, **Appointment Date**, **Service Status**, and **Payment Paid** into the **Columns** section.
4. Add the **Rating for Service** and **Payment Status** to the **Rows** section.
5. Remove any unnecessary fields and add a **Line Chart** visualization.
6. Click **Save** and name the report **New Service Information Report**.
7. Select the appropriate folder and click **Save**.

The screenshot shows a web browser window with multiple tabs open. The active tab is for a Salesforce Lightning application. The URL is <https://ksrmcollegeofengineering-df-dev-ed.lightning.force.com/lightning/o/Report/home?queryScope=mrn>. The page title is "Recent | Reports". The main content area shows a table of recent reports. One report is listed: "New Service Information Report" (Report Name), "Garage Management Folder" (Folder), "SHAIK MOHAMMED GAFFAR ALI" (Created By), and "20/12/2024, 12:55 pm" (Created On). The sidebar on the left lists categories like Reports, Folders, and Favorites.

Screenshot of a Salesforce Lightning Report titled "New Service Information Report".

Report Summary:

- Total Records: 5
- Total Payment Paid: ₹24,000

Performance Chart:

Rating for service	Sum of Payment
1	~5k
2	~5.5k
3	~5.8k
4	~6.5k
5	~7.5k

Table:

	Customer Name	Appointment Date	Service Status	Payment Paid
1	Mac	13/11/2024	Completed	₹5,000
2	Mac	13/11/2024	Completed	₹5,000
3	Abdullah	19/12/2024	-	₹2,000
4	Abdullah	19/12/2024	Completed	₹2,000
5	Ibn Abdullah	10/12/2024	Completed	₹10,000
6				₹24,000

System Status: 24°C Mostly cloudy

Screenshot of a Salesforce Lightning Report titled "New Service information Report" in Report Builder mode.

Report Preview:

Previewing a limited number of records. Run the report to see everything.

Report Structure:

- Groups:**
 - GROUP ROWS: Rating for service
 - GROUP COLUMNS: Payment Status
- Columns:**
 - Add column...
 - Customer Name
 - Appointment Date
 - Service Status
 - # Payment Paid

Table:

Rating for service	Payment Status	Completed	Total
1	Sum of Payment Paid	₹5,000	₹5,000
	Record Count	1	1
2	Sum of Payment Paid	₹5,000	₹5,000
	Record Count	1	1
4	Sum of Payment Paid	₹4,000	₹4,000
	Record Count	2	2
5	Sum of Payment Paid	₹10,000	₹10,000
	Record Count	1	1
Total	Sum of Payment Paid	₹24,000	₹24,000
	Record Count	5	5

Performance Chart:

Rating for service	Sum of Payment Paid
1	~5k
2	~5.5k
3	~5.8k
4	~6.5k
5	~7.5k

Table:

	Customer Name	Appointment Date	Service Status	Payment Paid
1	Mac	13/11/2024	Completed	₹5,000
2	Mac	13/11/2024	Completed	₹5,000
3	Abdullah	19/12/2024	-	₹2,000
4	Abdullah	19/12/2024	Completed	₹2,000
5	Ibn Abdullah	10/12/2024	Completed	₹10,000
6				₹24,000

System Status: 24°C Mostly cloudy

Screenshot of the Salesforce Lightning interface showing the "Create Report" modal.

Create Report

Category

- Recently Used
- All
- Accounts & Contacts
- Opportunities
- Customer Support Reports
- Leads
- Campaigns
- Activities
- Contracts and Orders
- Price Books, Products and Assets
- Administrative Reports
- File and Content Reports
- Individuals
- Other Reports
- Hidden Report Types

Select a Report Type

Search bar: `service`

Showing results for service

Recently Used Report Types

Report Type Name	Category
Service information	Custom

Details

Service Information (Custom Report Type)

Description: Service Information

Created By You: New Service Information Report

Created By Others: No Reports Yet

Objects Used in Report Type

- Customer Details
- Appointment
- Service records

Buttons: **Start Report**, **Fields (42)**

System tray: 24°C, Mostly cloudy, 07:50, 24-12-2024

Screenshot of the Salesforce Lightning interface showing the "New Service Information Report" page.

Report: Service Information
New Service Information Report

Table: Rating for service

Rating for service	Payment Status	Completed	Total
1	Sum of Payment Paid	\$5,000	\$5,000
	Record Count	1	1
2	Sum of Payment Paid	\$5,000	\$5,000
	Record Count	1	1
4	Sum of Payment Paid	\$4,000	\$4,000
	Record Count	2	2
5	Sum of Payment Paid	\$10,000	\$10,000
	Record Count	1	1
Total	Sum of Payment Paid	\$24,000	\$24,000
	Record Count	5	5

Table: Details (5 Rows)

Customer Name	Appointment Date	Service Status	Payment Paid
1 Mac	13/11/2024	Completed	\$5,000
2 Mac	13/11/2024	Completed	\$5,000
3 Abdullah	19/12/2024	-	\$2,000
4 Abdullah	19/12/2024	Completed	\$2,000
5 Ibn Abdullah	10/12/2024	Completed	\$10,000
			\$24,000

Buttons: **Enable Field Editing**, **Search**, **Print**, **Export**, **Edit**

Table footer: Row Counts, Detail Rows, Grand Total, Stacked Summaries

System tray: 24°C, Mostly cloudy, 08:01, 24-12-2024

Salesforce Lightning Report Builder - New Service information Report

Fields

- Groups
 - GROUP ROWS
 - Add group...
- Rating for service
- GROUP COLUMNS
- Add group...
- Payment Status

Columns

- Add column...

Customer Name

Appointment Date

Service Status

Payment Paid

Details (5 Rows)

Customer Name	Appointment Date	Service Status	Payment Paid
1 Mac	13/11/2024	Completed	\$5,000
2 Mac	13/11/2024	Completed	\$5,000
3 Abdullah	19/12/2024	-	\$2,000
4 Abdullah	19/12/2024	Completed	\$2,000
5 ibn abdullah	10/12/2024	Completed	\$10,000
			\$24,000

Billing details and feedback

Reports

Dashboards

Service information

Rating for service

Completed

Total

PERFORMANCE

Sum of Payment Paid

Rating for service

Display As

- Bar
- Column
- Stacked Bar
- Stacked Column
- Line
- Donut
- Funnel
- Scatter Plot

Chart Properties

Chart Title

PERFORMANCE

Y-Axis

Rating for service

X-Axis

Sum of Payment Paid

Chart Attributes

Row Counts

Detail Rows

Grand Total

Stacked Summaries

08:03 24-12-2024

Salesforce Lightning Report Builder - New Service information Report

Fields

- Groups
 - GROUP ROWS
 - Add group...
- Rating for service
- GROUP COLUMNS
- Add group...
- Payment Status

Columns

- Add column...

Customer Name

Appointment Date

Service Status

Payment Paid

Details (5 Rows)

Customer Name	Appointment Date	Service Status	Payment Paid
1 Mac	13/11/2024	Completed	\$5,000
2 Mac	13/11/2024	Completed	\$5,000
3 Abdullah	19/12/2024	-	\$2,000
4 Abdullah	19/12/2024	Completed	\$2,000
5 ibn abdullah	10/12/2024	Completed	\$10,000
			\$24,000

Billing details and feedback

Reports

Dashboards

Service information

Rating for service

Completed

Total

PERFORMANCE

Sum of Payment Paid

Rating for service

Display As

- Bar
- Column
- Stacked Bar
- Stacked Column
- Line
- Donut
- Funnel
- Scatter Plot

Chart Properties

Chart Title

PERFORMANCE

Y-Axis

Rating for service

X-Axis

Sum of Payment Paid

Chart Attributes

Row Counts

Detail Rows

Grand Total

Stacked Summaries

08:03 24-12-2024

Report: Service Information
New Service information Report

Total Records: 5 Total Payment Paid: ₹24,000

PERFORMANCE

Sum of Payment Paid

Rating for service

Display As

- Bar
- Column
- Stacked Bar
- Stacked Column
- Line
- Donut
- Funnel
- Scatter Plot

Chart Properties

Chart Title

PERFORMANCE

Y-Axis

Rating for service

X-Axis

Sum of Payment Paid

Chart Attributes

Row Counts

Detail Rows

Grand Total

Stacked Summaries

08:03 24-12-2024

New Service information Report

Report Service Information

Rating for service ▾ Payment Status → ▾ Completed Total

	Sum of Payment Paid	Record Count	Total
1	₹5,000	1	₹5,000
2	₹5,000	1	₹5,000
4	₹4,000	2	₹4,000
5	₹10,000	1	₹10,000
Total	₹24,000	5	₹24,000

Details (5 Rows) Click an intersection in the table above to filter details.

Customer Name	Appointment Date	Service Status	Payment Paid
1 Mac	13/11/2024	Completed	₹5,000
2 Mac	13/11/2024	Completed	₹5,000
3 Abdullah	19/12/2024	-	₹2,000
4 Abdullah	19/12/2024	Completed	₹2,000
5 ibn abdullah	10/12/2024	Completed	₹10,000
6			₹24,000

Row Counts Detail Rows Grand Total Stacked Summaries

24°C Mostly cloudy 08:04 24-12-2024

New Service information Report

Report Service Information

Total Records Total Payment Paid
5 ₹24,000

PERFORMANCE

Details (5 Rows) Click an intersection in the table above to filter details.

Customer Name	Appointment Date	Service Status	Payment Paid
1 Mac	13/11/2024	Completed	₹5,000
2 Mac	13/11/2024	Completed	₹5,000
3 Abdullah	19/12/2024	-	₹2,000
4 Abdullah	19/12/2024	Completed	₹2,000
5 ibn abdullah	10/12/2024	Completed	₹10,000
6			₹24,000

Row Counts Detail Rows Grand Total Stacked Summaries

24°C Mostly cloudy 08:04 24-12-2024

New Service information Report

Report Service Information

PERFORMANCE

Rating for service ▾ Payment Status → ▾ Completed Total

	Sum of Payment Paid	Record Count	Total
1	₹5,000	1	₹5,000
2	₹5,000	1	₹5,000
4	₹4,000	2	₹4,000

Details (5 Rows) Click an intersection in the table above to filter details.

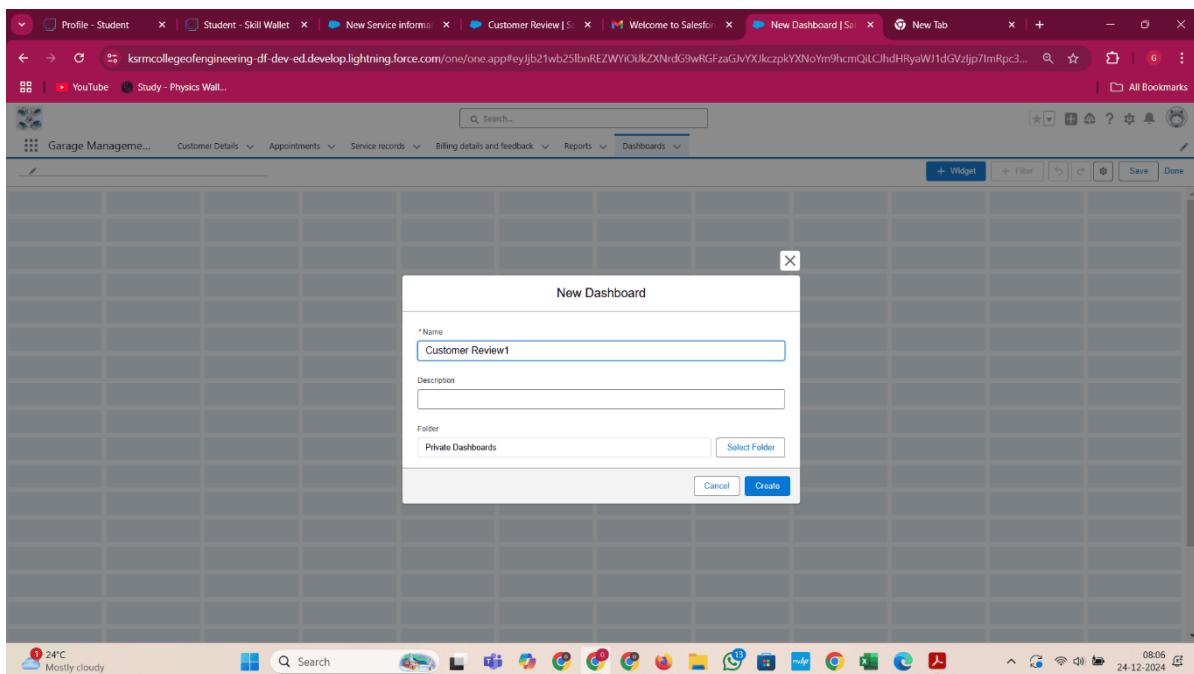
Customer Name	Appointment Date	Service Status	Payment Paid
1 Mac	13/11/2024	Completed	₹5,000
2 Mac	13/11/2024	Completed	₹5,000
3 Abdullah	19/12/2024	-	₹2,000
4 Abdullah	19/12/2024	Completed	₹2,000
5 ibn abdullah	10/12/2024	Completed	₹10,000
6			₹24,000

Row Counts Detail Rows Grand Total Stacked Summaries

24°C Mostly cloudy 08:05 24-12-2024

Step 8: UI Testing for Dashboards

1. Go to the **Dashboards** tab.
2. Click **New Dashboard**, give it a name (e.g., **Service Rating Dashboard**), and select the folder where it will be stored.
3. Click **Create** and add a **Component**.
4. Select the **Service Information Report** and choose the **Line Chart** visualization.
5. Customize the theme and click **Add**.
6. Click **Save**, then click **Done** to finalize the dashboard.
7. To set up email subscriptions, click on **Subscribe** at the top-right of the dashboard.
8. Set the frequency to **Weekly**, choose **Monday** as the preferred day, and click **Save**.



The screenshot shows a Salesforce Lightning interface for a 'Customer Review' dashboard. At the top, there are several tabs: 'Profile - Student', 'Student - Skill Wallet', 'New Service Information', 'Customer Review | S', 'Welcome to Salesforce', 'Customer Review1 | J', 'New Tab', and 'YouTube'. Below the tabs, the main area displays a grid-based dashboard editor. A context menu is open over the grid, showing options like '+ Widget', '+ Filter', 'Save', and 'Done'. A sub-menu is also visible, listing 'Chart or Table' and 'Image'. The bottom of the screen shows a Windows taskbar with various pinned icons and system status indicators.

Customer Review1

+ Widget + Filter Save Done

Chart or Table

A3 Text

Image

krmcollegeofengineering-df-dev-ed.develop.lightning.force.com/.../dashboardApp.app?dash...

24°C Mostly cloudy

Search

08:07 24-12-2024

Customer Review1

+ Widget + Filter Save Done

Select Report

Reports

Recent

Created by Me

Private Reports

Public Reports

All Reports

Folders

Created by Me

Shared with Me

All Folders

Select Report

Search Reports and Folders.

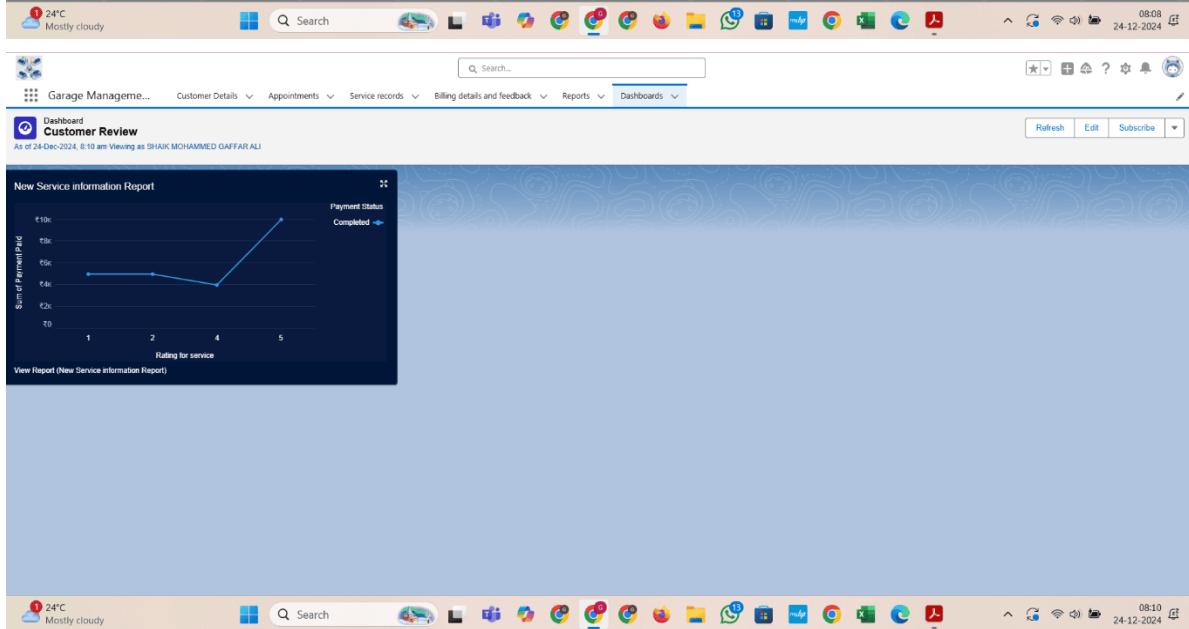
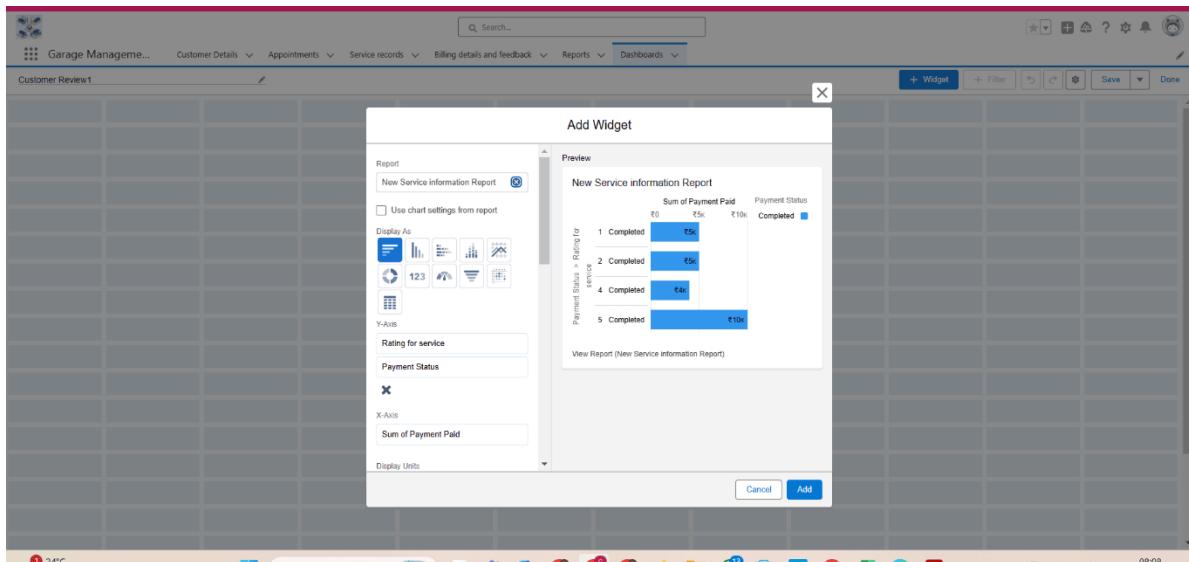
New Service Information Report
SHAIK MOHAMMED GAFFAR ALI - 24-Dec-2024, 8:03 am - Garage Management Folder

Cancel Select

24°C Mostly cloudy

Search

08:07 24-12-2024



Screenshot of a web browser showing the "Edit Subscription" dialog box over a dashboard. The dialog allows scheduling dashboard refreshes and subscribing to receive results.

Edit Subscription

Schedule dashboard refreshes and subscribe to receive results.

Settings

Frequency: Daily Weekly Monthly

Days: Sun Mon Tue Wed Thu Fri Sat

Time:

Recipients

⚠ Recipients see the same report data as the person running the report.

Receive new results by email when dashboard is refreshed. ⓘ

Send email to:
Me

The background dashboard displays a line chart titled "New Service information Report" showing the "Sum of Payment Paid" versus "Rating for service". The chart shows a general upward trend from rating 1 to 5.

At the bottom of the screen, the taskbar shows the weather (24°C, Mostly cloudy) and various pinned application icons.

Screenshot of a web browser showing a confirmation message after a subscription was started.

You started a dashboard subscription.

The dashboard background shows the same "New Service information Report" chart as the previous screenshot.

At the bottom of the screen, the taskbar shows the weather (24°C, Mostly cloudy) and various pinned application icons.

Key Scenarios Addressed by Salesforce in the Implementation of the Project

Salesforce provides a robust platform to address several business scenarios effectively in the context of a Garage Management System (GMS). These scenarios help streamline operations, improve customer satisfaction, automate processes, and offer meaningful insights. Below are the key scenarios that Salesforce handles during the implementation of this project:

1. Customer Information Management:

Salesforce simplifies the collection, storage, and management of customer details, ensuring that the information is easily accessible for service management. It handles:

- **Customer Name**
- **Contact Information (Phone Number, Email, etc.)**
- **Vehicle Details**
- **Preferred Service Details**
- **Service History**

With Salesforce, customer details can be stored in custom objects like **Customer Details**, offering a 360-degree view of the customer, making it easy to follow up, track service history, and offer personalized services.

2. Appointment Scheduling and Management:

Scheduling and managing customer appointments is automated through Salesforce, allowing customers to book their services and ensuring seamless management on the backend. Key features include:

- **Service Appointment Creation**
- **Real-Time Availability Tracking**
- **Automated Notifications** (e.g., Appointment Confirmation, Reminders)
- **Service Types** (e.g., Routine Maintenance, Repairs, Replacement Parts)
- **Appointment Confirmation and Rescheduling**

Salesforce provides tools such as **Calendar Integration** and **Automated Email Notifications**, ensuring a smooth appointment process for both customers and service staff.

3. Service Records Tracking:

Managing service records in Salesforce ensures that the entire service process is recorded and tracked efficiently. This scenario involves:

- **Service Record Creation**
- **Vehicle Details at Check-In**

- **Service Assignment to Technicians**
- **Real-Time Tracking of Service Progress**
- **Status Updates** (e.g., "Completed," "In Progress," "Pending")

By leveraging **Custom Forms** and **Automated Task Assignments**, Salesforce enables efficient service management and helps technicians and managers monitor service statuses seamlessly.

4. Billing and Payment Management:

Salesforce plays a crucial role in tracking payments, issuing invoices, and managing customer feedback. It includes:

- **Payment Processing Integration** with various gateways
- **Tracking Payment Status** (e.g., Pending, Paid, Overdue)
- **Issuing Invoices and Receipts**
- **Collecting Service Feedback and Ratings**
- **Customer Communication for Outstanding Payments**

With the help of **Custom Billing Objects** and integration capabilities, Salesforce streamlines the billing process, sending automatic payment reminders and collecting feedback post-service.

5. Analytics and Reporting:

Salesforce provides powerful reporting features that allow businesses to analyze data, track performance, and make informed decisions. Key aspects include:

- **Tabular Reports** for simple, row-based data
- **Summary Reports** for grouped data analysis
- **Matrix Reports** for cross-tabulation of data
- **Joined Reports** to combine data from different sources

Through Salesforce's **Report Builder** and the ability to apply complex filters and grouping, businesses can create reports that provide actionable insights into various aspects of the Garage Management System, including customer engagement, service performance, and revenue analysis.

6. Dashboard Visualizations:

Salesforce Dashboards allow real-time visualization of business data, providing insights into operational efficiency and trends. They include:

- **Real-Time Business Insights**
- **Trend Identification** (e.g., Service demand, Payment trends)
- **Impact Measurement** (e.g., Revenue Generation, Customer Satisfaction)
- **Interactive Dashboards** with Drill-Down Capability.

Conclusion

The implementation of the **Garage Management System (GMS)** using **Salesforce** has significantly transformed how the garage manages its operations, offering a more streamlined and efficient solution for handling customer data, service appointments, billing, and reporting. By leveraging Salesforce's powerful features, the system has automated and simplified key processes, making the garage more responsive to customer needs and improving overall operational efficiency.

Through **centralized customer data management**, Salesforce ensures that customer details are easily stored, retrieved, and updated, enabling a more personalized service. The system provides a **seamless appointment scheduling process**, integrating real-time tracking of service appointments, mechanic availability, and service requirements. This has resulted in fewer scheduling conflicts and a better customer experience with automated reminders and updates.

Service tracking is now more transparent, with real-time updates shared with customers regarding the status of their vehicle. This feature builds trust and improves customer satisfaction by keeping them informed throughout the service process. Additionally, the **automated billing and payment** system has minimized errors and optimized payment tracking, ensuring a smooth transaction experience for customers.

The system's **reporting and analytics capabilities** have empowered decision-makers to analyze performance, track service metrics, and uncover insights that drive business improvements. The use of **customizable reports** and **dynamic dashboards** ensures that key business data is presented in an easily digestible format, aiding quick and informed decision-making.

In summary, the **Salesforce-powered GMS** has optimized operational workflows, enhanced customer engagement, and delivered significant value by automating routine tasks, improving data management, and offering real-time visibility into garage activities. This implementation has not only improved day-to-day operations but also paved the way for future growth by providing a scalable and adaptable platform that can evolve with changing business needs and customer demands. The successful deployment of this system has set the foundation for ongoing business improvements and long-term success for the garage.

Key Achievements Include:

1. Efficient Customer Data Management

The system provides a comprehensive view of customer information, allowing for easy access and tracking of customer interactions, service history, and feedback.

2. Automated Appointment Scheduling and Management

With automated reminders, availability tracking, and rescheduling options, the scheduling process has been significantly optimized, reducing errors and improving service delivery.

3. Real-Time Service Tracking

The system offers real-time updates on service progress, from check-in to completion, ensuring that customers are informed and technicians are efficiently managing their tasks.

4. Seamless Billing and Payment Management

Integration with payment gateways and automated invoicing has streamlined the billing process, while tracking payment status and feedback collection has improved customer satisfaction and operational transparency.

5. Data-Driven Insights through Analytics and Reporting

Customizable reports and dashboards provide valuable insights into service performance, customer engagement, and financial metrics, enabling data-driven decision-making.

6. Improved Dashboard Visualizations

The use of real-time dashboards allows managers to monitor key performance indicators (KPIs), track trends, and assess the impact of various business activities.

Overall, the Garage Management System implemented using Salesforce has brought significant improvements to operational efficiency, customer satisfaction, and data management. With Salesforce's flexible and scalable platform, the garage can easily adapt to future changes, ensuring continued growth and success in managing its operations.

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