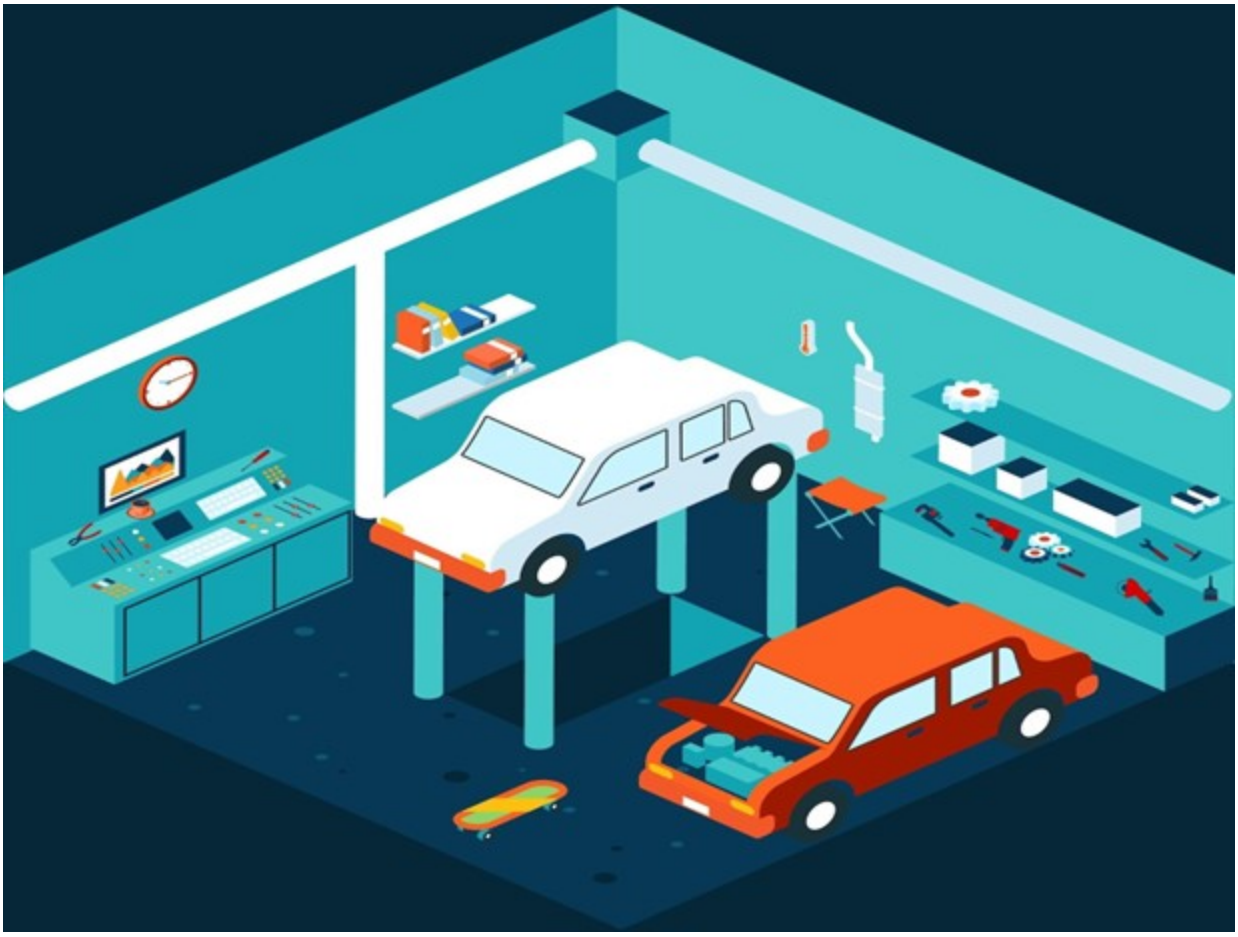
GARAGE MANAGEMENT SYSTEM



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SALESFORCE

Introduction:

Are you new to Salesforce? Not sure exactlywhat it is, or how to use it? Don’t know where you should start on your learning journey? If you’ve answered yes to any of these questions, then you’re in the right place. This moduleis for you.

Welcome to Salesforce! Salesforce is game-changing technology, with ahost of productivity-boosting features, that will help you sell smarter and faster. As you work toward your badge for this module, we’ll take you through these features and answer the question, “What is Salesforce, anyway?”.

What is Salesforce?

Salesforce is your customer successplatform, designed to help you sell, service,market, analyze, and connect with your customers. Salesforce has everything you need to run your business from anywhere. Using standard products and features, you can manage relationships with prospects and customers, collaborate and engage with employees and partners, and store your data securely in the cloud.

So what does that really mean? Well, before Salesforce, your contacts,emails, follow-up tasks,and prospective dealsmight have been organized somethinglike this:

1. Introduction:

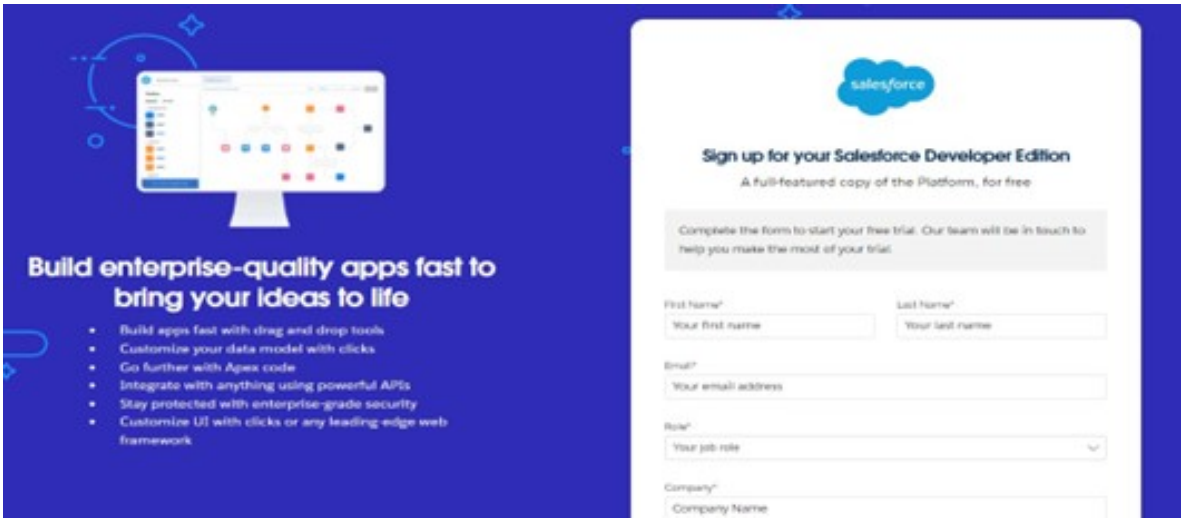
This document outlines the process of designing and implementing a

Garage Management System using Salesforce. The goal is to streamline garage operations and enhance customer satisfaction by managing customer information, appointments, service records, billingdetails, and feedbackefficiently.

1. Createa Salesforce DeveloperAccount

Step-by-Step Process:

1. **Sign Up**:
    a. Visit [Salesforce Developer Signup](https://developer.salesforce.com/signup).
    b. Fill out the sign-up form with the following details:
        i. First Nam and Last Name
        ii. Email Address
        iii. Role: Select “Developer”
        iv. Company: Enter your college or organization name
        v. Country: Select your country (e.g.,India)
        vi. Postal Code: Enteryour postal code
        vii. Username: Create a uniqueusername in the format username@organization.com



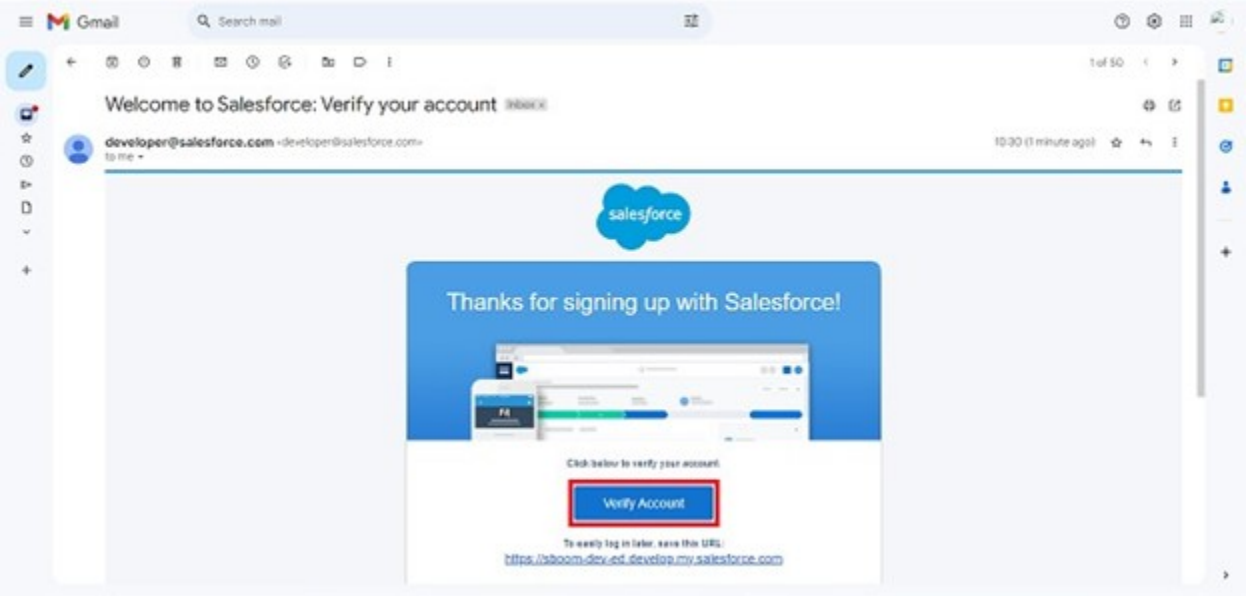
2. Account Activation:

a. Check your email inbox for an activation email from Salesforce.

b. Click on the VerifyAccount link.

c. Set a password and answer the security question.

d. After changing your password, you will be redirected to theSalesforce setup page.



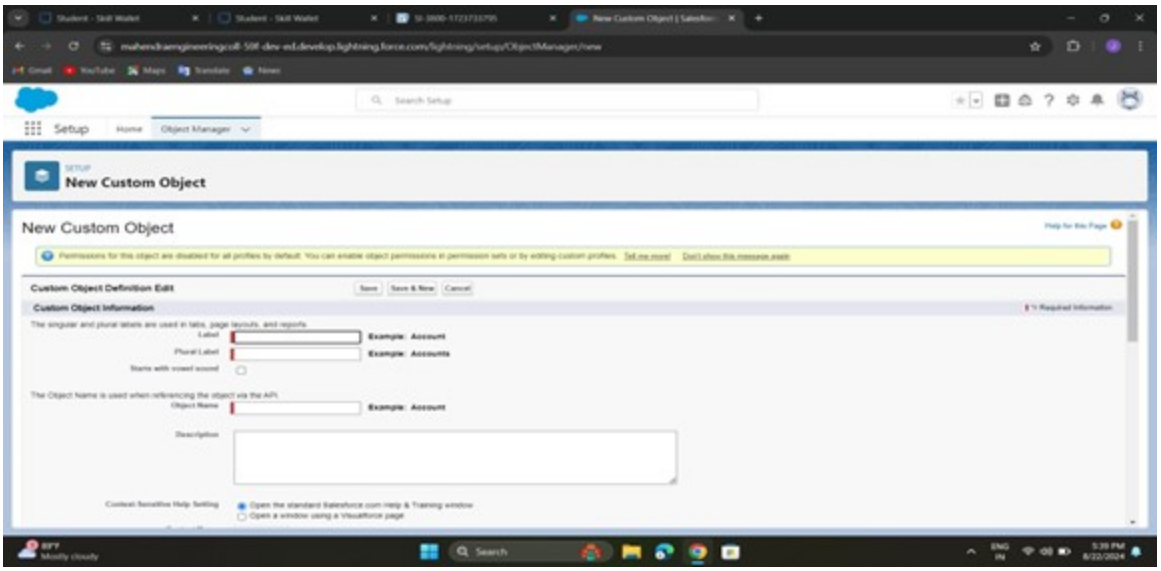
3. Create Custom Objects

Custom objects in Salesforce act like databasetables where you can store specific information related to your business. Here's how to create them:

Steps to Create Custom Objects:

1. Navigate to ObjectManager:

a. From the Salesforce Setupmenu (click on the gear icon), selectObject Manager.



1. Create an Object:

a. Click Create and choose Custom Object.

b. Fill in the object detailsfor each type:
   i. Customer Details
   ii. Appointment
   iii. Service Records
   iv. Billing Details and Feedback

c. For each object,set the following:
   i. Label: Name of the object (e.g., CustomerDetails)
   ii. Plural Label: Pluralform (e.g., CustomerDetails)
   iii. Record Name: Define the primary field for records(e.g., Customer Name for CustomerDetails)
   iv. Data Type: Choose appropriate types (e.g., Text, Auto Number)
   v. Enable options like Allow Reports,Track Field History,and

**AllowSearch.

d. Click Save to create the object.

2. Create Custom Tabs

Tabs provide a user interfacefor accessing customobjects and records.

1. **Navigate to Tabs:**
    a. Go to Setup → Tabs → New (under Custom Object Tabs).

2. **Create a New Tab:**
    b. Select the object (e.g.,Customer Details) from the list.
    c. Choose a tab style and icon to represent the object.
    d. Click Next, configure visibility settings for profiles, and clickSave.

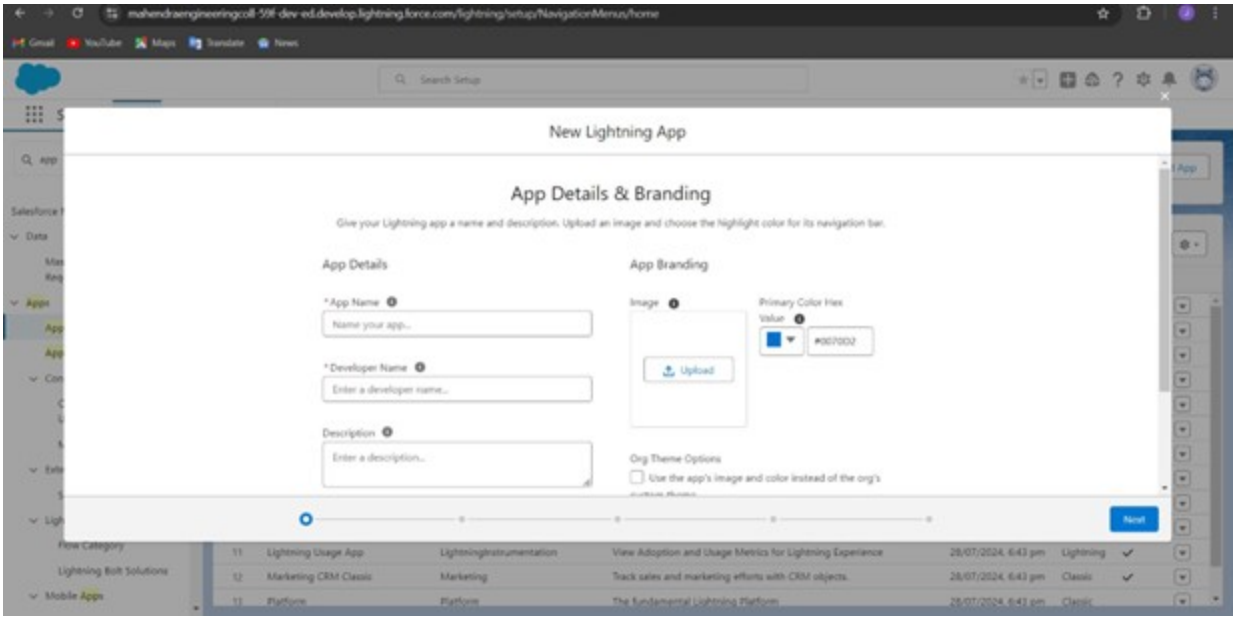
3. **Repeat for Remaining Objects:**
    e. Create tabs for Appointments, Service Records, and BillingDetailsand Feedback following similar steps.

4. Create a Lightning App

A Lightning App bundles objects,tabs, and other items togetherfor user access.

Steps to Create a Lightning App:

1. **Navigate to App Manager:**
    a. Go to Setup → App Manager → New LightningApp.



2. Configure the App:

a. App Details: Name your app (e.g.,Garage Management Application).

b. App Options: Choose defaultsettings or customizeas needed.

c. Navigation Items:Add tabs for custom objects(Customer Details, Appointments, etc.).

d. Utility Items: Configure utility bar settingsif required.

e. User Profiles: Assign the app to user profiles(e.g., SystemAdministrator).

3. Save and Finish:

f. Review the settings and click Save & Finishto complete the appcreation.

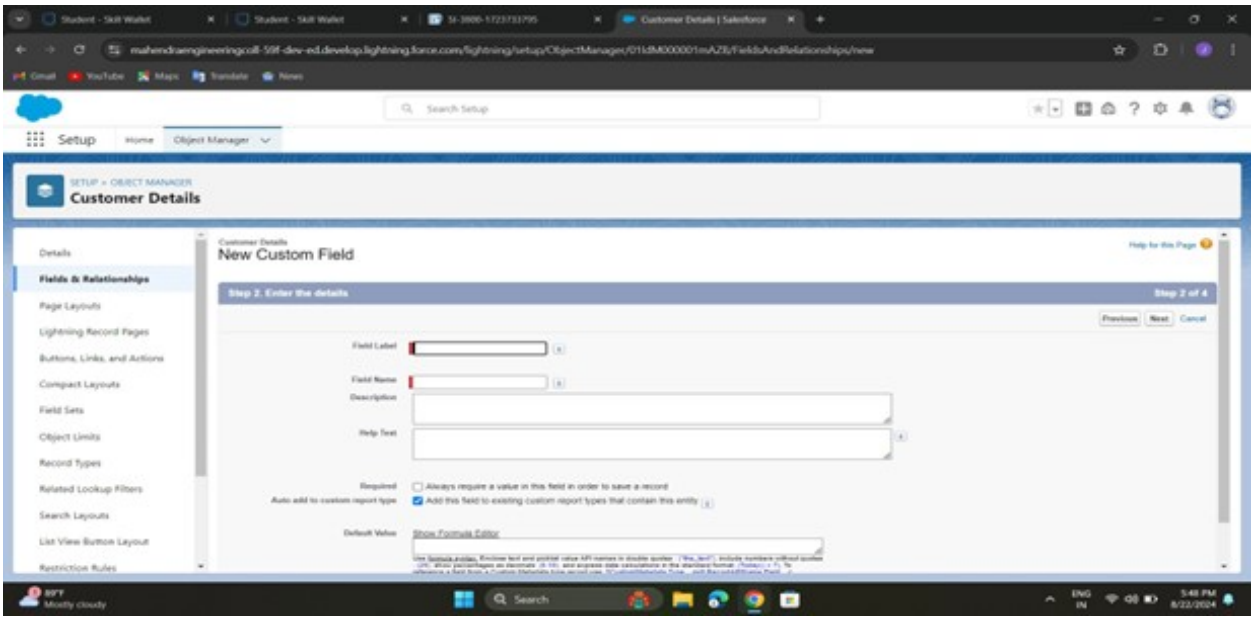
5. Define and Create CustomFields

Fields represent the data points stored in each object.Custom fields are tailored to your specificneeds.

Steps to Create CustomFields:

1. Navigate to Fields& Relationships:

a. Go to Setup → Object Manager→ Select the Object (e.g.,CustomerDetails) → Fields & Relationships → New.



2. Create Field Types:

a. Text: For fields like Phone Numberor Vehicle NumberPlate.
b. Date: For fields like Appointment Date.
c. Currency: For fieldslike Service Amount.
d. Checkbox: For fields like Maintenance Service,Repairs.
e. Picklist: For fields like Service Status or PaymentStatus.
f. Formula: For calculated fields like ServiceDate (use the formulafunction to calculate dates based on other fields).

3. Configure Field Properties:

g. Set field label, data type, and properties such as required,unique, or read-onlyas needed.
h. Click Next, configure field-level security and page layouts, andclick Save.

6. Create Lookup Relationships

Lookup relationships link records from different objects,allowing for data integration.

Steps to Create LookupRelationships:

1. Navigate to Fields& Relationships:

a. Go to Setup → Object Manager→ Select the Object (e.g.,Appointment) → Fields& Relationships→ New.

2. **Create a LookupRelationship:**

   b. Select Lookup Relationship as the field type.

   c. Choose the related object (e.g., CustomerDetails for Appointments).

   d. Configure the relationship properties and filters.

- Click Save to establish the relationship.

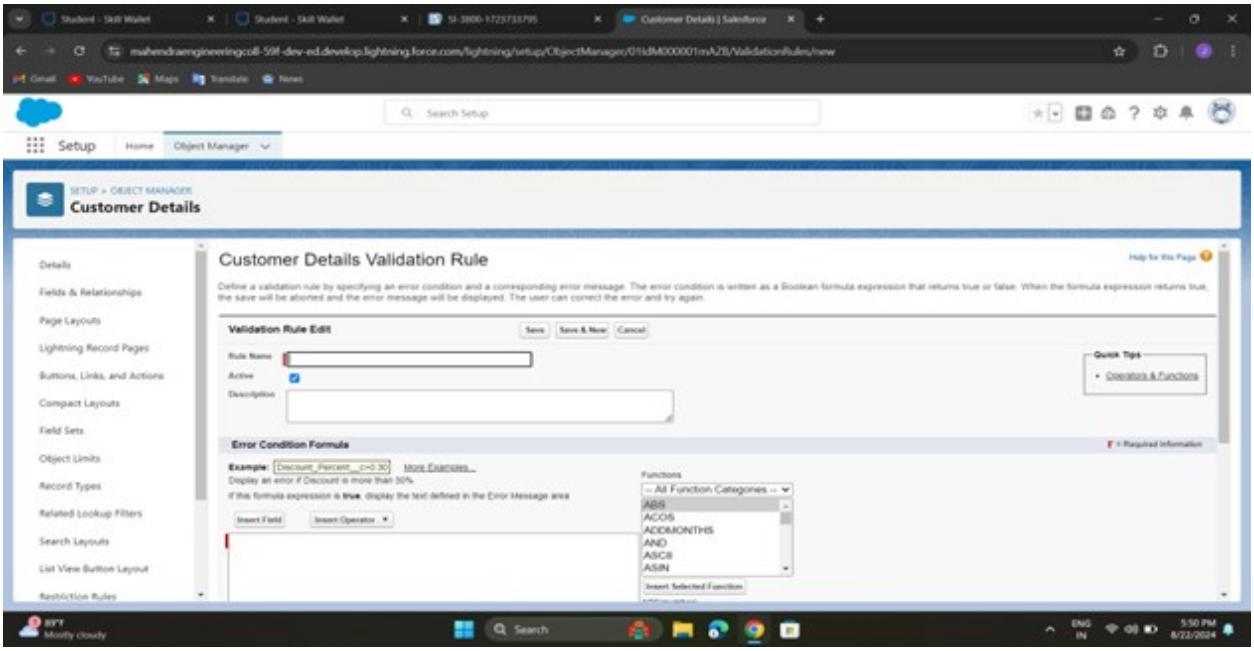
3. **Repeat for RelatedObjects:**

   e. Create lookup relationships for other objects(e.g., linkingServiceRecords to Appointments).

7. Define Validation Rules

Validation rules ensure data integrity by enforcing certaincriteria.

Steps to Create Validation Rules:



1. **Navigate to Validation Rules:**

   a. Go to Setup → Object Manager→ Select the Object (e.g.,Appointment) → Validation Rules → New.

2. **Define Rule Criteria:**

b. Enter the rule name, description, and criteria for validation.

c. Use formulas to definethe conditions that must be met for thedata to be valid.

d. Enter error messagesto display when validation fails.

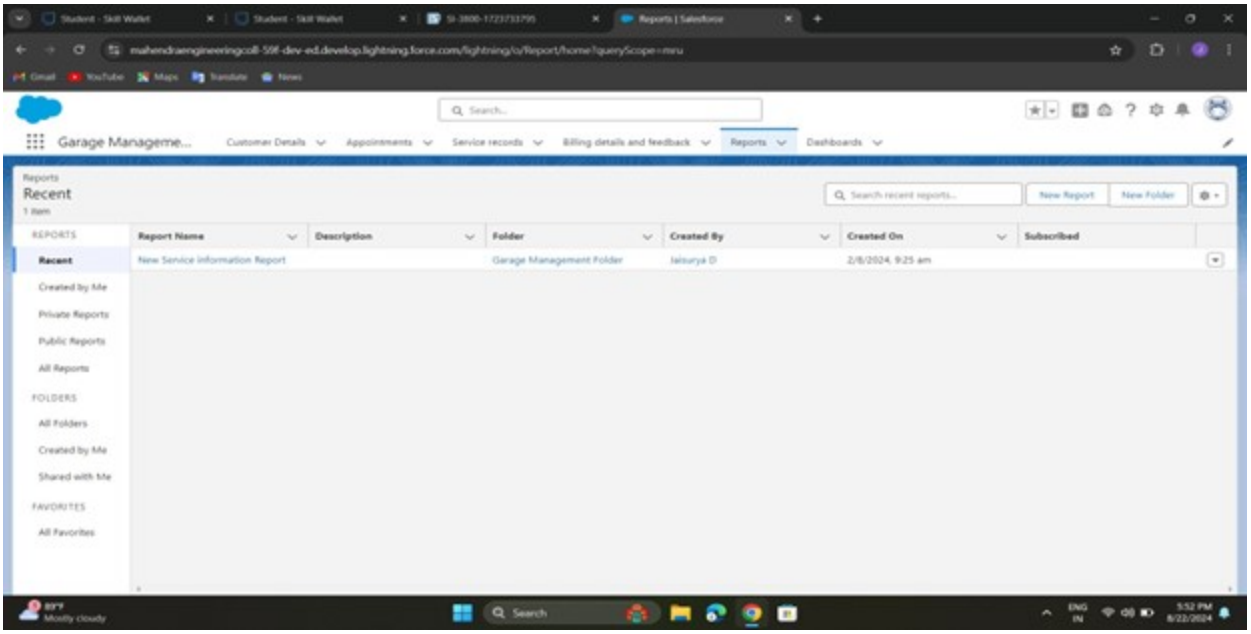
3. Save and Test Rules:

e. Click Save to activatethe rule.

f. Test the rule by entering data into the system to ensure it worksas intended.

8. Configure Reports and Dashboards

Reports and dashboards provideinsights and visualrepresentations of data.



Steps to Configure Reports:

1. Navigate to Reports:

a. Go to Setup → Reports & Dashboards → Reports → New Report.

2. Create a Report:

b. Select the report type and configure filtersand columns.

c. Save and run the report to view data.

3. **Create a Dashboard:**

   d. Go to Setup → Reports & Dashboards → Dashboards → New Dashboard.

   e. Add components such as charts and graphs to visualize reportdata.

   f. Configure dashboard settingsand share with users as needed.

9. Set Up WorkflowRules and Automation

Automation helps streamline repetitive tasks and processes.

Stepsto Set Up Workflow Rules:

1. **Navigate to WorkflowRules:**

   a. Go to Setup → WorkflowRules → New Rule.

2. **Define Rule Criteria:**

   b. Choose the object and set criteriafor triggering the workflow.

   c. Define actions such as email alerts,field updates, or taskcreation.

3. **Activate Workflow Rule:**

   d. Click Save and Activateto enable the rule.

Steps to Use Process Builder:

1. **Navigate to ProcessBuilder:**

   a. Go toSetup → ProcessBuilder → New Process.

2. **Define Process:**

   b. Set up processcriteria and actionsusing a visualinterface.

   c. Save and activate the process.

10. Customize Page Layouts

Page layouts determinehow fields and related information are displayed on record pages.

Steps to Customize Page Layouts:

1. **Navigate to Page Layouts:**

   a. Go to Setup → Object Manager → Select the Object (e.g.,Appointment) → Page Layouts.

2. Edit Layout:

b. Drag and drop fields and sections to arrange the layout.
c. Configure visibility settings and field placements.
d. Click Save to applythe layout changes.

11. Create and ConfigureEmail Template

Email templates help standardize communication for notifications and updates.

Steps to Create Email Templates:

1. Navigate to EmailTemplates:

a. Go to Setup → Email → ClassicEmail Templates.

2.Create Template:

b. Choose New Template, select type (e.g., HTML), and enter templatedetails.
c. Include merge fieldsto personalize emails.
d. Save the template and test by sending a sample email.

12. Ensure Security and Access Control

Managing user access is crucial for protecting sensitivedata and ensuring proper permissions.

Steps to Configure Securityand Access Control:

1. Navigate to Profiles:

a. Go to Setup → Profiles.
b. Edit profiles to set permissions for objects and fields.

2. Use Permission Sets:

c. Go to Setup → Permission Sets.
d. Click New Permission Set to createa new set of permissions.
e. Define the permissions needed (object access,field-levelsecurity, etc.).
f. Assign the permission set to usersor groups as necessary.
g. Click Save to apply the permissions.

3. Set Up Role Hierarchy:

h. Go to Setup → Roles → Role Hierarchy.

i. Define roles that reflect your organization's structure.

j. Set up roles to control accessand data visibility based on userroles.

k. Assign users to roles to manage their access level accordingly.

13. Develop Custom LightningComponents (Optional)

Custom LightningComponents can enhancethe user interfaceand addspecific functionalities.

Steps to Develop CustomLightning Components:

1. **Set Up Salesforce DX:**
   a. Install Salesforce CLI and configure Salesforce DX for development.
   b. Create a new project usingthe Salesforce CLI.
2. **Create Lightning Component:**
   c. In your Salesforce DX project, use the command sfdx force:lightning:component:create to create a new component.
   d. Define the component's functionality using HTML, JavaScript, andApex (if needed).
3. **Deploy and Test:**
   e. Deploy the component to your Salesforce environment using Salesforce CLI.
   f. Test the component in your Salesforce org to ensureit meets requirements.

14. Testing and Deployment

Before going live, thoroughly test your systemand deploy it to production.

Steps for Testing:

1. **Unit Testing:**
   a. Test individual components, objects,and fields to ensure theywork as expected.
   b. Use Salesforce's built-in testingtools or createtest cases tovalidate functionality.

2. **User Acceptance Testing(UAT):**
    c. Have end-users test the system in a sandboxenvironment.
    d. Collect feedback and make necessary adjustments based on user experiences.
3. **System Testing:**
    e. Test the entire system,including integrations, automation, anduser interfaces.
    f. Ensure that all components work together seamlessly.

Steps for Deployment:

1. **Prepare for Deployment:**
    a. Review deployment plans and ensure all components are ready for production.
    b. Use change sets or Salesforce DX for deployment.
2. **Deploy to Production:**
    c. Deploy the system using change sets or Salesforce CLI.
    d. Monitor the deployment processand address any issues that arise.
3. **Post-Deployment:**
    e. Verify that the system is functioning correctly in the productionenvironment.
    f. Provide training and support to users as needed.

15. Continuous Improvement and Maintenance

After deployment, ongoingmaintenance and improvements are essential to keep the system effective.

Steps for Continuous Improvement:

1. **Monitor System Performance:**
    a. Regularly check systemperformance and user feedback.
    b. Address any performance issuesor bugs promptly.
2. **Update and EnhanceFeatures:**
    c. Periodically reviewand update featuresbased on evolvingbusiness needs.
    d. Implement new functionalities and enhancements as required.
3. **Provide User Support:**

e. Offer training and supportto users to ensure they caneffectively use the system.
f. Maintain a knowledgebase or help resources for user assistance.

4. Review Security:

g. Regularly reviewand update securitysettings and accesscontrols.
h. Ensure compliance with data protection regulations and organizational policies.

This document provides a detailed approach to creating a Garage Management System in Salesforce. By following these steps, you can effectively manage garage operations and improve overallefficiency

and customersatisfaction.

Conclusion:

The Garage Management System project has been a comprehensive and enriching experience, demonstrating the power of Salesforce in streamlining business processes and enhancing customersatisfaction. Through this project, we successfully designed and implemented a customized Salesforce solutionto manage:

1. Customer information and appointments
2. Service records and billing details
3. Feedback and ratings

Utilizing Salesforce's robust features, including custom objects, fields, validation rules, duplicate rules, profiles, and flows, we created a seamless and efficient systemfor garage ownersto manage theirbusiness.

The Garage Management System showcases our ability to apply Salesforce skills to real-world business challenges, driving process automation, data analysis, and customer relationship management. This project has not only honed our technical skills but also fostered collaboration,

creativity, and problem-solving.

As we conclude this project, we are confident that the Garage Management System will serve as a valuable asset for garageowners, empowering them to deliver exceptional customer experiences, drive business growth, and stay aheadin the competitive market.

Thank you to our instructors, mentors,and team membersfor their guidance, support, and dedication throughout this project.