

PROJECT OF SALESFORCE DEVELOPER GARAGE MANAGEMENT SYSTEM

to optimize customer details, appointment, service records, and billing for automotive garages.

By

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PROJECT OVERVIEW

The Garage Management System (GMS) project on Salesforce is a CRM solution aimed at transforming the way automotive garages manage customer relationships, vehicle service records, and day-to-day operations. With centralized customer profiles, service histories, and appointment scheduling, the system empowers garages to deliver more personalized and efficient customer service. Automated reminders and service notifications help enhance customer engagement, ensuring regular maintenance and timely service updates to boost customer satisfaction.

In addition to customer management, the GMS CRM includes comprehensive vehicle tracking and work order management, allowing technicians and advisors to access detailed service histories, track service progress, and assign tasks seamlessly. An integrated parts inventory module ensures that essential components are in stock, with automated reordering for low-stock items to prevent service delays. Technicians can use mobile access to view work orders and inventory on the go, optimizing workflow and reducing downtime.

Finally, the GMS CRM supports billing and invoicing, providing a streamlined system for generating service estimates, digital invoices, and online payment options. With built-in analytics and reporting, managers gain insights into customer trends, revenue, and operational efficiency, enabling data-driven decisions for business growth. The system is designed to scale with the garage, offering robust data security and compliance, making it a future-proof solution for modern garage management needs.

OBJECTIVES

- **Enhance Customer Retention and Loyalty:** By providing personalized service reminders, streamlined appointment scheduling, and post-service follow-ups, the GMS CRM aims to build long-term customer relationships and increase repeat visits.
- **Optimize Resource Allocation & Technician Efficiency:** Efficient scheduling, real-time work order tracking, and inventory management help maximize technician productivity, reduce wait times, and ensure that resources are allocated effectively for each service job.
- **Increase Revenue through Data-Driven Upselling:** With insights into customer preferences and service history, the CRM enables garages to offer tailored service recommendations and upsell additional maintenance packages, driving revenue growth.
- **Reduce Operational Costs through Automation:** By automating routine tasks like appointment reminders, parts reordering, and invoicing, the GMS CRM minimizes manual workload, reduces errors, and cuts down operational costs.
- **Improve Business Insights and Strategic Planning:** Advanced reporting and analytics provide managers with valuable insights into service trends, technician performance, and financial metrics, supporting informed decision-making and strategic business growth.

KEY FEATURES

- **Customer details:**
 - Store and manage customer details including contact information, service history, and preferences.
 - Access comprehensive service records for customer insights and tailored service.
- **Appointment:**
 - Automated reminders and notifications to reduce no-shows.
 - Integrated calendar to optimize working time.
- **Service records:**
 - Track detailed service information including service type, parts used, and associated costs.
 - Link service records to specific customer appointments for easy tracking and reference.
- **Billing details:**
 - Generate and manage billing details, linking them to service records.
 - Track payment status and send timely payment reminders.
 - Automated invoice generation and email notifications for a streamlined payment process.
- **Feedback:**
 - Collect and manage customer feedback post-service.
 - Track ratings and comments to enhance service quality.
 - Analyze feedback trends for continuous improvement.

DETAILED PROCESS

Activity – 1

Salesforce account Creation & Activation

- Create a Developer Account by providing all the required details and Activate the account.

Activity – 2

Object Creation

- Create all the required objects with the given label name and format.
- **Customer details Object**

The screenshot shows the 'Customer Details' object configuration page in Salesforce Setup. The left sidebar lists various configuration options: 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, and List View Button Layout. The 'Details' section is selected, showing the object's configuration. The 'API Name' is 'Customer_Details__c', the 'Singular Label' is 'Customer Details', and the 'Plural Label' is 'Customer Details'. The 'Deployment Status' is 'Deployed'. The 'Help Settings' are set to 'Standard salesforce.com Help Window'. There are 'Edit' and 'Delete' buttons in the top right corner.

- **Appointment Object**

Appointment	Appointment__c	Custom Object	27/10/2024	✓	▼
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- **Service records Object**

Service records	Service_records__c	Custom Object	27/10/2024	✓	▼
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- **Billing details & Feedback Object**

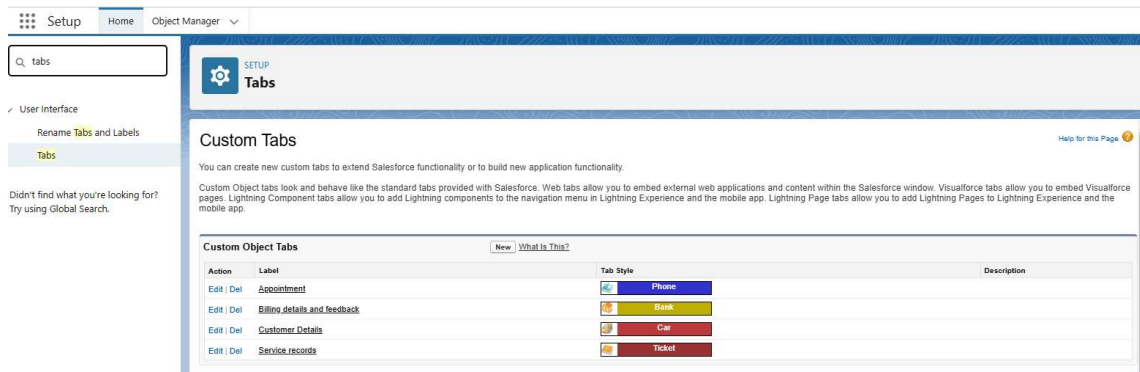
Billing details and feedback	Billing_details_and_feedback__c	Custom Object	27/10/2024	✓	▼
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Activity – 3

Custom Tabs Creation

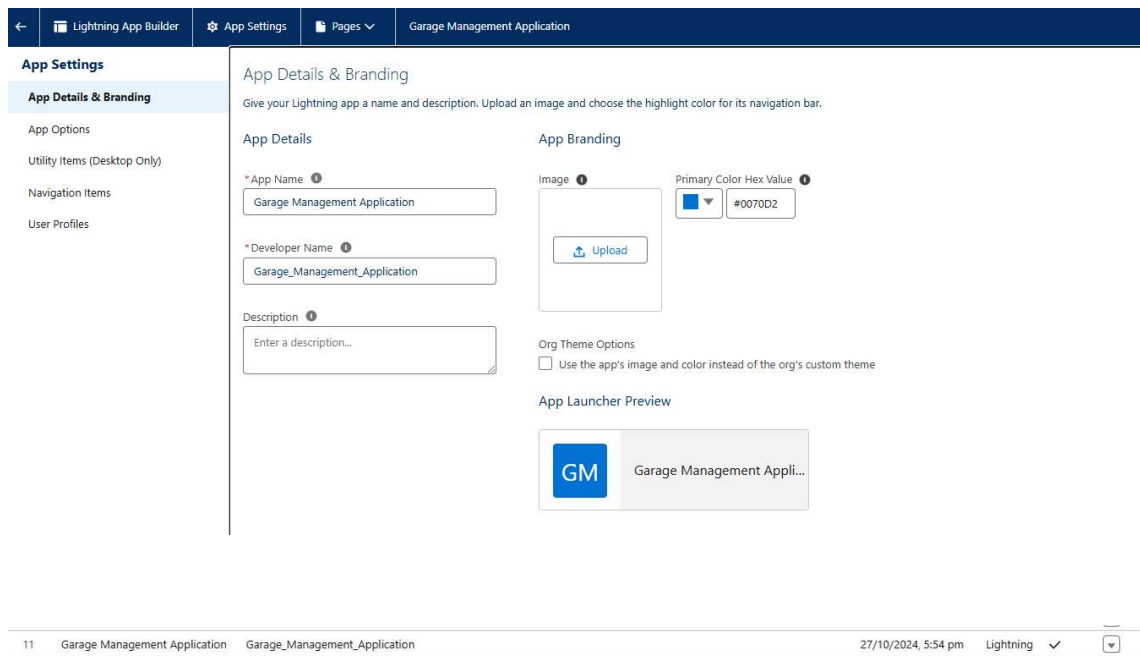
- A tab is like a user interface that is used to build records for objects and to view the records in the objects.

- Create these Custom tabs for every Object.



Activity – 4

Create a Lightning App



Activity – 5

Field Creation for every object

- Customer details object

SETUP > OBJECT MANAGER

Customer Details

Details	Fields & Relationships 6 Items, Sorted by Field Label <input type="text" value="Quick Find"/> <input type="button" value="New"/> <input type="button" value="Deleted Fields"/> <input type="button" value="Field Dependencies"/> <input type="button" value="Set History Tracking"/>				
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Created By	CreatedById	Lookup(User)		
Lightning Record Pages	Customer Name	Name	Text(80)		✓
Buttons, Links, and Actions	Gmail	Gmail__c	Email		
Compact Layouts	Last Modified By	LastModifiedById	Lookup(User)		
Field Sets	Owner	OwnerId	Lookup(User,Group)		✓
Object Limits	Phone number	Phone_number__c	Phone		
Record Types					
Related Lookup Filters					

- Appointment object

SETUP > OBJECT MANAGER

Appointment

Details	Fields & Relationships 13 Items, Sorted by Field Label <input type="text" value="Quick Find"/> <input type="button" value="New"/> <input type="button" value="Deleted Fields"/> <input type="button" value="Field Dependencies"/> <input type="button" value="Set History Tracking"/>				
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Appointment Date	Appointment_Date__c	Date		
Lightning Record Pages	Appointment Name	Name	Auto Number		✓
Buttons, Links, and Actions	Created By	CreatedById	Lookup(User)		
Compact Layouts	Customer Details	Customer_Details__c	Lookup(Customer Details)		✓
Field Sets	Customer Gmail	Customer_Gmail__c	Lookup(Customer)		✓
Object Limits	Customer Name	Customer_Name__c	Lookup(Customer)		✓
Record Types	Last Modified By	LastModifiedById	Lookup(User)		
Related Lookup Filters	Maintenance service	Maintenance_service__c	Checkbox		
Search Layouts	Owner	OwnerId	Lookup(User,Group)		✓
List View Button Layout	Repairs	Repairs__c	Checkbox		
Restriction Rules	Replacement Parts	Replacement_Parts__c	Checkbox		
Scoping Rules	Service Amount	Service_Amount__c	Currency(18, 0)		
Object Access	Vehicle number plate	Vehicle_number_plate__c	Text(10) (Unique Case Insensitive)		✓
Triggers					
Flow Triggers					
Validation Rules					

- Service records object

SETUP > OBJECT MANAGER

Service records

Details	Fields & Relationships 8 Items, Sorted by Field Label <input type="text" value="Quick Find"/> <input type="button" value="New"/> <input type="button" value="Deleted Fields"/> <input type="button" value="Field Dependencies"/> <input type="button" value="Set History Tracking"/>				
Fields & Relationships	FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Page Layouts	Appointment	Appointment__c	Lookup(Appointment)		✓
Lightning Record Pages	Created By	CreatedById	Lookup(User)		
Buttons, Links, and Actions	Last Modified By	LastModifiedById	Lookup(User)		
Compact Layouts	Owner	OwnerId	Lookup(User,Group)		✓
Field Sets	Quality Check Status	Quality_Check_Status__c	Checkbox		
Object Limits	service date	service_date__c	Formula (Date)		
Record Types	Service records Name	Name	Auto Number		✓
Related Lookup Filters	Service Status	Service_Status__c	Picklist		
Search Layouts					
List View Button Layout					

- Billing details & Feedback object

SETUP > OBJECT MANAGER

Billing details and feedback

Details

Fields & Relationships 8 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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)		✓

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

Activity – 6

Validation Rules

- For Appointment

SETUP > OBJECT MANAGER

Appointment

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 Scoping Rules Object Access Triggers Flow Triggers

Validation Rules 1 Items, Sorted by Rule Name

New

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
Vehicle	Vehicle number plate	Please enter valid number	✓	Manohara Sai Subba Raju Golla, 27/10/2024, 6:45 pm

- For Service records

SETUP > OBJECT MANAGER

Service records

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 Scoping Rules Object Access Triggers Flow Triggers

Validation Rules 1 Items, Sorted by Rule Name

New

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
service_status_note	Service Status	still it is pending	✓	Manohara Sai Subba Raju Golla, 27/10/2024, 6:47 pm

- For Billing details & Feedback

SETUP > OBJECT MANAGER

Billing details and feedback

Validation Rules	1 Item, Sorted by Rule Name				
RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY	
rating_should_be_less_than_5	Rating for service	rating should be from 1 to 5	✓	Manohara Sai Subba Raju Golla, 28/10/2024, 11:41 pm	

Activity – 7

Duplication Rules

- Matching Rule:

Create a matching rule for the Customer details Object with the given criteria.

Setup Home Object Manager

Q matchi

Data

✓ Duplicate Management

Matching Rules

Didn't find what you're looking for? Try using Global Search.

SETUP Matching Rules

All Matching Rules

What Are Matching Rules? [Expand]

View: All Matching Rules Create New View

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Action	Rule Name	Object	Status	Description	Last Modified Date	Last Modified By
Del Deactivate	Matching customer details	Customer Details	Active		27/10/2024	Manohara

- Duplicate Rule:

Create a duplicate rule for the same customer details object which allows the duplication in input fields.

Setup Home Object Manager

Q dup

Data

✓ Duplicate Management

Duplicate Error Logs

Duplicate Rules

Matching Rules

Feature Settings

Sales

Individual Settings

Products

SETUP Duplicate Rules

All Duplicate Rules

What Are Duplicate Rules? [Expand]

View: All Duplicate Rules

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All

Rule Name	Description	Object	Matching Rule	Active	Last Modified By	Last Modified Date
Customer Detail duplicate		Customer Details	Matching customer details	✓	Manohara	27/10/2024

Activity – 8

Creating Profiles

- **Manager Profile**
- **Sales Person Profile**

The screenshot shows the Salesforce Setup interface for Profiles. The left sidebar has a search bar with 'profil' and a 'Profiles' link under the 'Users' section. The main content area is titled 'Profiles' and shows a table of profiles. The 'Manager' profile is selected, and its details are shown in the right pane.

Action	Profile Name	User License	Custom
Edit Clone	Gold Partner User	Gold Partner	<input type="checkbox"/>
Edit Clone	High Volume Customer Portal	High Volume Customer Portal	<input type="checkbox"/>
Edit Clone	High Volume Customer Portal User	High Volume Customer Portal	<input type="checkbox"/>
Edit Clone	Identity User	Identity	<input type="checkbox"/>
Edit Del ...	Manager	Salesforce	<input checked="" type="checkbox"/>
Edit Clone	Marketing User	Salesforce	<input type="checkbox"/>
Edit Clone	Minimum Access - API Only Integrations	Salesforce Integration	<input type="checkbox"/>
Edit Clone	Minimum Access - Salesforce	Salesforce	<input type="checkbox"/>
Edit Clone	Partner App Subscription User	Partner App Subscription	<input type="checkbox"/>
Edit Clone	Partner Community Login User	Partner Community Login	<input type="checkbox"/>
Edit Clone	Partner Community User	Partner Community	<input type="checkbox"/>
Edit Del ...	Read Only	Salesforce	<input checked="" type="checkbox"/>
Edit Del ...	Sales Person	Salesforce Platform	<input checked="" type="checkbox"/>
Edit Del ...	Salesforce API Only System Integrations	Salesforce Integration	<input checked="" type="checkbox"/>

Activity – 9

Roles & Role Hierarchy

The screenshot shows the Salesforce Setup interface for Roles. The left sidebar has a search bar with 'role' and a 'Roles' link under the 'Users' section. The main content area is titled 'Roles' and shows a role hierarchy for 'Gayatri Vidya Parishad College Of Engineering'.

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

Gayatri Vidya Parishad College Of Engineering

- Add Role**
- CEO** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - CFO** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - COO** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - Manager** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - Sales Person** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - SVP Customer Service & Support** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - SVP Human Resources** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**
 - SVP Sales & Marketing** [Edit](#) | [Del](#) | [Assign](#)
 - Add Role**

Activity – 10

Users

anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records.

The screenshot shows the Salesforce Setup interface for the 'Users' section. The left sidebar contains a navigation menu with options like 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', and 'User Management Settings'. The main content area is titled 'All Users' and includes a description: 'On this page you can create, view, and manage users. To get more licenses, use the Your Account app. Let's Go'. Below this is a table of users with columns for Action, Full Name, Alias, Username, Role, Active, and Profile. The table lists several users, including Courtney Brown, Chatter Expert, Manohara Sai Subba Raju, Mikaelson, Niklaus, Ganesh, User Integration, User Security, and Wheeler Allison. At the bottom of the table are buttons for 'New User', 'Reset Password(s)', and 'Add Multiple Users'.

Activity – 11

Public Groups

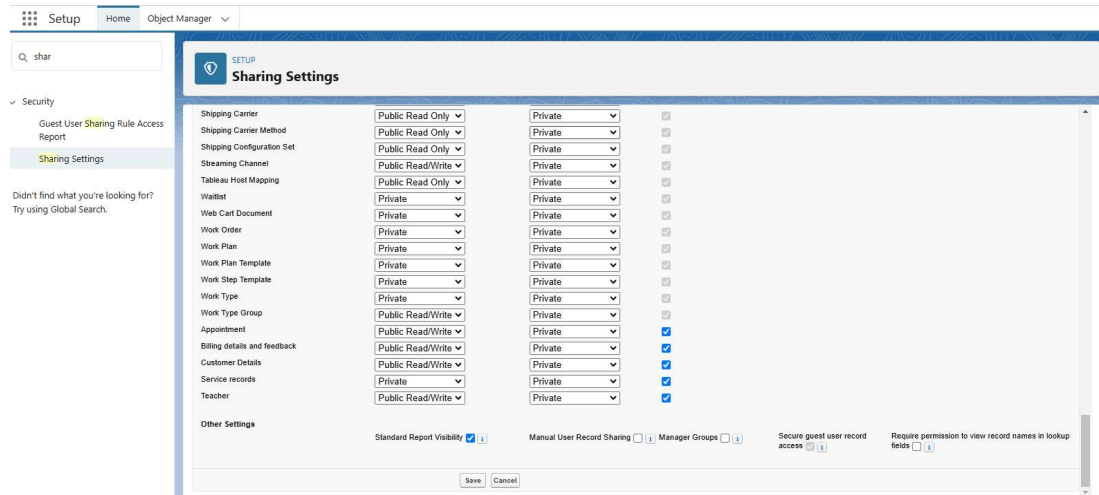
- Creating New Public Groups

a valuable tool for Salesforce administrators and developers to streamline user management, data access, and security settings.

The screenshot shows the Salesforce Setup interface for the 'Public Groups' section. The left sidebar contains a navigation menu with options like 'Users', 'Public Groups', 'Feature Settings', 'Salesforce Files', 'Content Deliveries and Public Links', 'User Interface', 'Global Actions', 'Publisher Layouts', 'Company Settings', 'Calendar Settings', and 'Public Calendars and Resources'. The main content area is titled 'Public Groups' and includes a description: 'A public group is a set of users. It can contain individual users, other groups, the users in a particular role or territory, or the users in a role or territory plus all of the users below that role or territory in the hierarchy.' Below this is a table of public groups with columns for Action, Label, Group Name, Created By, and Created Date. The table lists one group, 'sales team', created by 'Golla Manohara Sai Subba Raju' on '27/10/2024, 7:26 pm'. At the bottom of the table is a button for 'New'.

Activity – 12

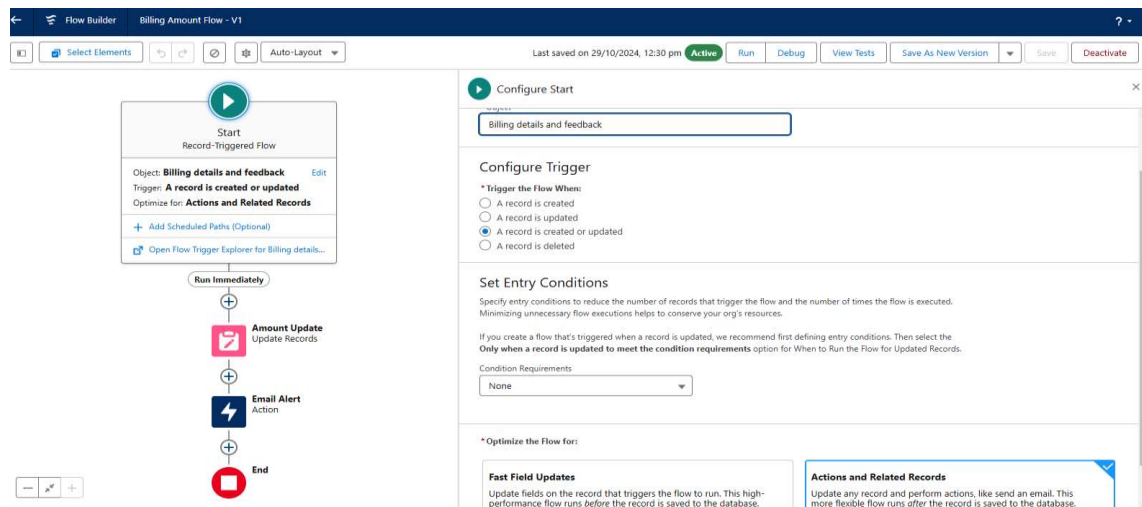
Sharing Settings: control how records are accessed and shared within your organization. These settings are crucial for maintaining data security and privacy.



Activity – 13

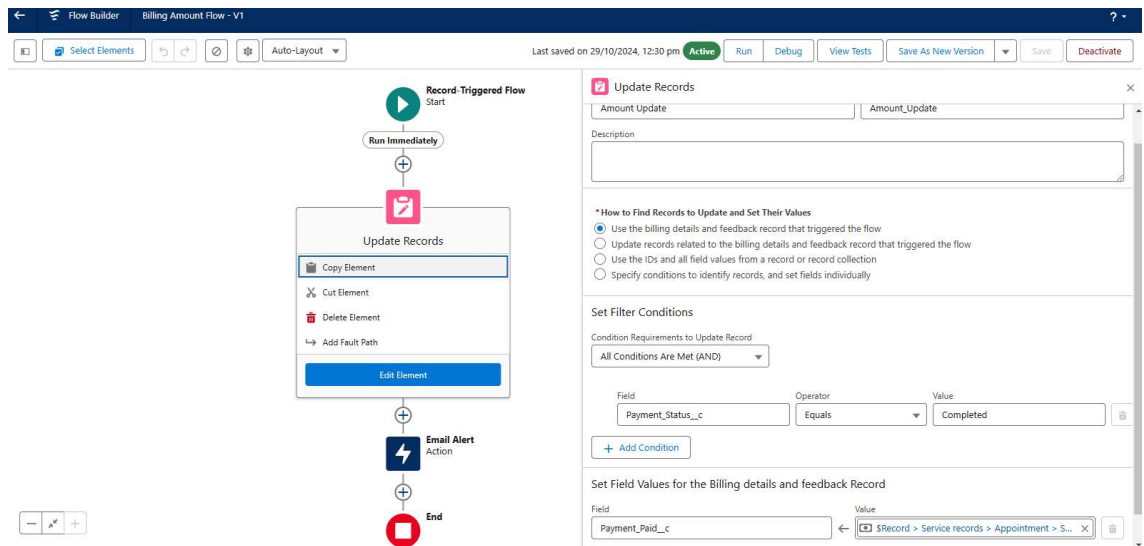
Flows: a powerful tool that allows you to automate business processes, collect and update data, and guide users through a series of screens or steps.

- Record-Trigger Flow



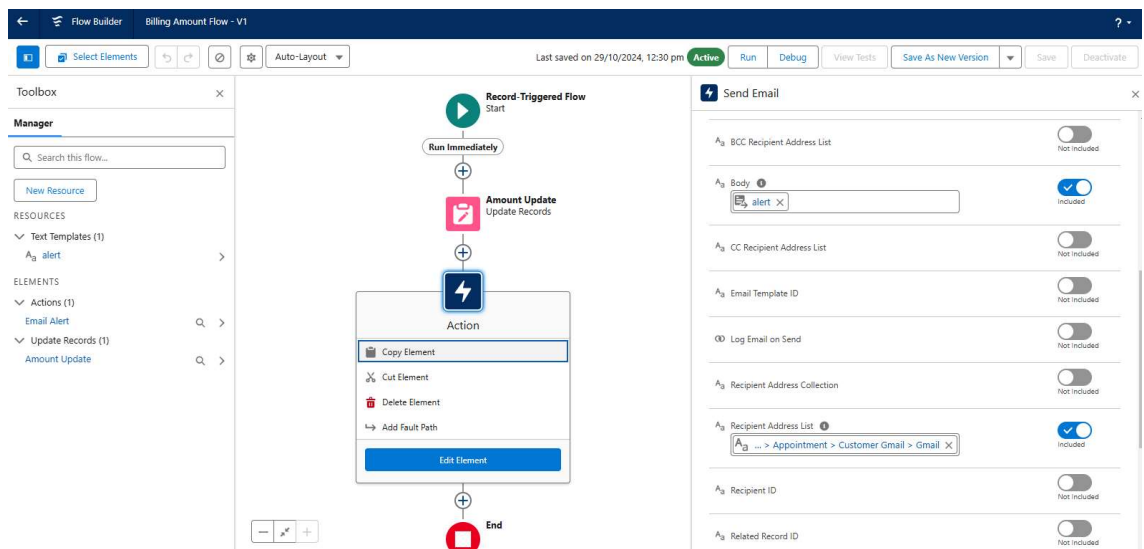
- Amount Update Flow

- Field : Payment_Paid__c
- Value :
{!\$Record.Service_records__r.Appointment__r.Service_Amount__c}



- Email Alert Flow

- RecipientAddressList:
{!\$Record.Service_records__r.Appointment__r.Customer_Name__r.Gmail__c}



Activity – 14

Triggers

- AmountDistributionHandler.apxc (Class)

```

1 public class AmountDistributionHandler {
2
3     public static void amountDist(list<Appointment_c> listApp){
4
5         list<Service_records_c> serlist = new list<Service_records_c>();
6
7         for(Appointment_c app : listApp){
8
9             if(app.Maintenance_service_c == true && app.Repairs_c == true && app.Replacement_Parts_c == true){
10
11                 app.Service_Amount__c = 10000;
12
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             else if(app.Maintenance_service_c == true && app.Replacement_Parts_c == true){
22
23                 app.Service_Amount__c = 8000;
24
25             }
26
27             else if(app.Repairs_c == true && app.Replacement_Parts_c == true){
28
29                 app.Service_Amount__c = 7000;
30
31             }
32
33             else if(app.Maintenance_service_c == true){
34
35                 app.Service_Amount__c = 2000;
36
37             }
38
39             else if(app.Repairs_c == true){
40
41                 app.Service_Amount__c = 3000;
42
43             }
44
45             else if(app.Replacement_Parts_c == true){
46
47                 app.Service_Amount__c = 5000;
48
49             }
50         }
51     }
52 }

```

- AmountDistribution.apxt (Trigger)

```

1 trigger AmountDistribution on Appointment_c (before insert, before update) {
2
3     if(trigger.isbefore && trigger.isinsert || trigger.isupdate){
4
5         AmountDistributionHandler.amountDist(trigger.new);
6
7     }
8 }

```

Logs	Tests	Checkpoints	Query Editor	View State	Progress	Problems			
User	Application	Operation	Time	Status	Read	Size			
Manohara Sai Subba Raju Golla	Browser	/aura	10/29/2024, 12:30:35 PM	Success	Unread	279 bytes			
Manohara Sai Subba Raju Golla	Browser	/aura	10/29/2024, 12:30:24 PM	Success	Unread	1.3 KB			
Manohara Sai Subba Raju Golla	Browser	/Row/Billing_Amount_Flow/201d.00000	10/29/2024, 12:30:24 PM	Success	Unread	279 bytes			
Manohara Sai Subba Raju Golla	Browser	/aura	10/29/2024, 12:29:58 PM	Success	Unread	1.3 KB			
Manohara Sai Subba Raju Golla	Browser	/Row/Billing_Amount_Flow/201d.00000	10/29/2024, 12:29:57 PM	Success	Unread	279 bytes			
Manohara Sai Subba Raju Golla	Browser	/aura	10/29/2024, 12:29:47 PM	Success	Unread	1.3 KB			

Activity – 15

Reports

- Report Folder Creation

REPORTS	Name	Created By	Created On	Last Modified By	Last Modified Date
Recent	Einstein Bot Reports	Automated Process	15/7/2024, 11:47 pm	Automated Process	15/7/2024, 11:47 pm
Created by Me	Einstein Bot Reports Spring '23	Automated Process	15/7/2024, 11:47 pm	Automated Process	15/7/2024, 11:47 pm
Private Reports	Einstein Bot Reports Summer '23	Automated Process	15/7/2024, 11:47 pm	Automated Process	15/7/2024, 11:47 pm
Public Reports	Einstein Bot Reports Summer '22	Automated Process	15/7/2024, 11:47 pm	Automated Process	15/7/2024, 11:47 pm
	Einstein Bot Reports Winter '23	Automated Process	15/7/2024, 11:47 pm	Automated Process	15/7/2024, 11:47 pm
All Reports	Enablement Dashboard Reports Spring '24	Automated Process	15/7/2024, 11:47 pm	Automated Process	15/7/2024, 11:47 pm
FOLDERS	Enablement Dashboard Reports Summer '24	Automated Process	15/7/2024, 11:47 pm	Automated Process	15/7/2024, 11:47 pm
All Folders	Garage Management Folder	Manohara Sai Subba Raju Golla	27/10/2024, 10:56 pm	Manohara Sai Subba Raju Golla	27/10/2024, 10:56 pm
Created by Me					

- Report Type

Report Types

Custom report type definition

Report Type Label: Service Information
Report Type Name: Service Information
Report Type Category: Deployment Status
Other Reports: Deployed

Created By: Manohara Sai Subba Raju Golla
Modified By: Manohara Sai Subba Raju Golla

Object Relationships

Customer Details (A)
... with at least one related record from Appointment (B)
... with at least one related record from Service records (C)
... with at least one related record from Billing details and feedback (D)

Fields Available for Reports

Source	Selected Fields
Customer Details	9
Appointment	15
Service records	10
Billing details and feedback	10

- New Service Information Report

Service Information

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

Rating for service	Payment Status	Completed	Total
4	Sum of Payment Paid	€3,000	€5,000
	Record Count	1	2
5	Sum of Payment Paid	€7,000	€7,000
	Record Count	2	0
Total	Sum of Payment Paid	€10,000	€15,000
	Record Count	3	2

Sum of Payment Paid

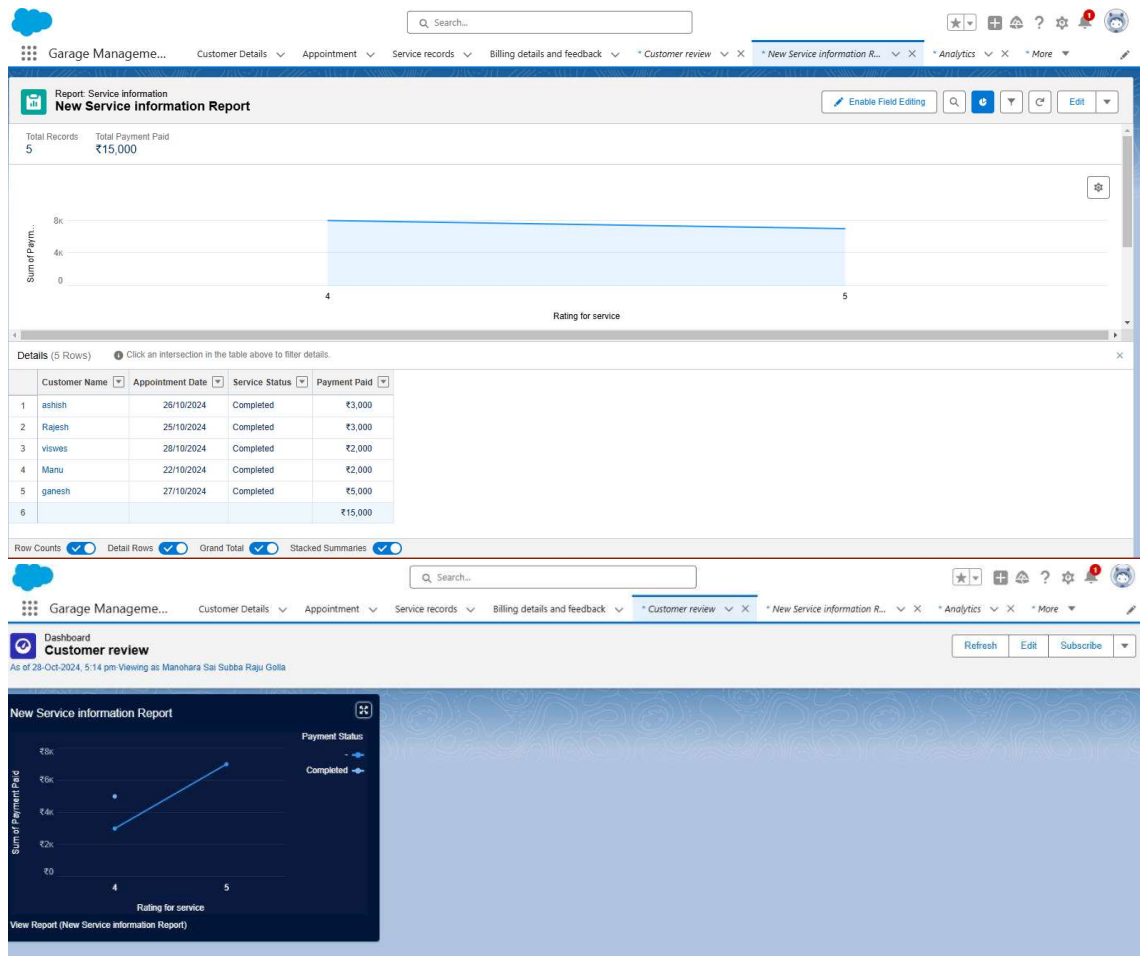
Rating for service

Details (5 Rows)

Customer Name	Appointment Date	Service Status	Payment Paid
1 ashish	26/10/2024	Completed	€3,000
2 Rajesh	25/10/2024	Completed	€3,000
3 viveas	28/10/2024	Completed	€2,000
4 Manu	22/10/2024	Completed	€2,000
5 ganesh	27/10/2024	Completed	€5,000
6			€15,000

Activity – 16

DashBoard: Dashboards help you visually understand changing business conditions so you can make decisions based on the real-time data you've gathered with reports.



CONCEPTS UTILIZED

(FOR OUR PROJECT IMPLEMENTATION)

- **What is SALESFORCE?**

Salesforce is like a digital hub that helps businesses stay connected with their customers. Imagine having a central place

where a company can keep track of every conversation, email, and sale, so no detail slips through the cracks. It's built to bring together sales, customer support, and marketing efforts, so everyone is on the same page.

With Salesforce, businesses can customize tools to fit their needs, automate repetitive tasks, and use built-in AI to get insights on what customers want. It's essentially a smart assistant for companies to build stronger, more personalized customer relationships.

- **Objects**

Objects are database tables that permit you to store data that is specific to an organization.

Types:-

1. Standard Objects
 - Provided by salesforce
2. Custom Objects
 - Created by users as per their requirements and flexibilities.

- **Tabs**

Tabs are navigation links that give users quick access to different objects, features, or data, like accounts, contacts, or dashboards, within the platform.

- **Lightning App**

A Lightning App in Salesforce is a tool that lets users build easy-to-use, interactive apps to streamline work and improve how they interact with data.

- **Fields**

Fields in Salesforce are like labelled blanks in a form where you fill in specific details like a person's name, phone number, or Gmail, so that all relevant information is organized and easy to find.

- **Validation & Duplication Rules**

- Validation rules in Salesforce are conditions that ensure data entered meets specific criteria before being saved, helping maintain data quality and accuracy.
- Duplication rules in Salesforce are settings that help prevent or manage duplicate records by identifying and blocking or alerting users about potential duplicates during data entry.

- **Profiles**

Profiles define what a user can see and do within the platform, acting like "permission sets" for different roles.

- **Role & Role Hierarchy**

Roles define a user's level of access to data and functions, creating a hierarchy that helps organizations manage who can see and edit information, ensuring everyone has the right permissions while still promoting collaboration across teams.

- **Users**

Users are people who can log in to the platform to manage customer information, track sales, and work with their teammates, helping them do their jobs better.

- **Public Groups**

Public groups in Salesforce are like team huddles that bring users together, making it easier to share information and collaborate on projects seamlessly.

- **Sharing Settings**

Sharing settings determine how and with whom you share data within your organization, ensuring the right people have access to the right information to collaborate effectively.

- **Flows**

Flows are powerful tools that allow users to automate complex business processes by visually designing step-by-step workflows that guide users or update records without needing to write code.

- **Apex Triggers**

APEX Triggers are custom pieces of code that automatically execute before or after specific events occur in the database, helping businesses automate tasks and enforce rules without needing manual input.

- **Reports**

Reports are tools that help businesses visualize and analyse their data, making it easier to understand trends and track performance at a glance.

- **Dashboard**

Dashboards are visual displays that summarize key metrics and data, helping businesses quickly see their performance and make informed decisions at a glance.

TEST AND VALIDATION

- **Approach to Testing:**

For the Garage Management System, our testing strategy ensures everything works smoothly and meets user needs. We'll combine both automated and manual testing methods, including:

1. Functional Testing
2. Integration Testing
3. User Acceptance Testing (UAT)
4. Performance Testing

- **Unit Testing (Apex Classes & Triggers):**

Unit testing will focus on individual components, like Apex classes and triggers, to ensure they function correctly. Key elements include:

1. **Positive Tests:** To confirm expected functionality under normal conditions.
2. **Negative Tests:** To check how the system handles errors or unexpected inputs.
3. **Bulk Tests:** To ensure the system can handle large amounts of data without issues.

EXAMPLE SCENARIO

Problem Statement:

XYZ Auto's, a local garage, is facing some real challenges. Customers often find it hard to get their cars in for service because of scheduling issues, leading to long wait times and frustrated clients. The mechanics have trouble accessing the latest information on repairs, which can slow things down. Plus, the garage doesn't have a good way to track inventory or understand its performance, making it tough to know how to improve.

Solution:

To turn things around, XYZ Auto's decides to use a Garage Management System built on the Salesforce platform.

- **Centralized Customer Database:**

Salesforce helps create a single place where all customer details, vehicle information, and repair histories are stored. This means when customers come in, staff can quickly pull up their records, making check-ins a breeze.

- **Appointment Scheduling:**

The new system includes an easy-to-use online scheduling tool, allowing customers to book their service appointments anytime. This helps the garage manage availability better and reduces those annoying scheduling conflicts.

- **Real-Time Tracking of Repairs:**

Mechanics can update status of repairs right in Salesforce. This means customers get real-time updates about their vehicles, which makes the whole process more transparent and keeps everyone in the loop.

- **Inventory Management:**

An integrated inventory feature keeps track of parts and supplies, alerting the manager when stocks are running low. This way, XYZ Auto's can always have the parts it needs on hand, helping to speed up repairs.

- **Performance Analytics:**

With Salesforce dashboards, the garage can easily analyze important metrics like average repair times and customer satisfaction. This data helps management make smarter decisions, spot popular services, and develop effective marketing strategies.

Outcome:

The new Garage Management System, XYZ Auto's sees a big boost in customer satisfaction. With shorter wait times and better communication, customers feel more valued. Mechanics are also happier, as they can easily access the latest repair information. Plus, the garage can manage its inventory better and gain valuable insights into its performance. Overall, this solution not only streamlines operations but also sets the stage for future growth, allowing XYZ Auto's to focus on what it does best: getting cars back on the road quickly and efficiently.

CONCLUSION

In conclusion, the Salesforce Garage Management System is a powerful tool that makes running a service centre easier and more

efficient. It combines features like online appointment scheduling, real-time updates on car repairs, and smart inventory management, all in one place. This means customers get faster service and clear communication, which helps keep them happy. For the staff, it reduces confusion and makes their jobs smoother. Plus, the system gives managers valuable insights into performance, allowing them to spot trends and improve the business. Overall, this system helps garages provide excellent service and build strong relationships with their customers.

Thank You