

Garage Management System - Salesforce Project Documentation

Project Overview

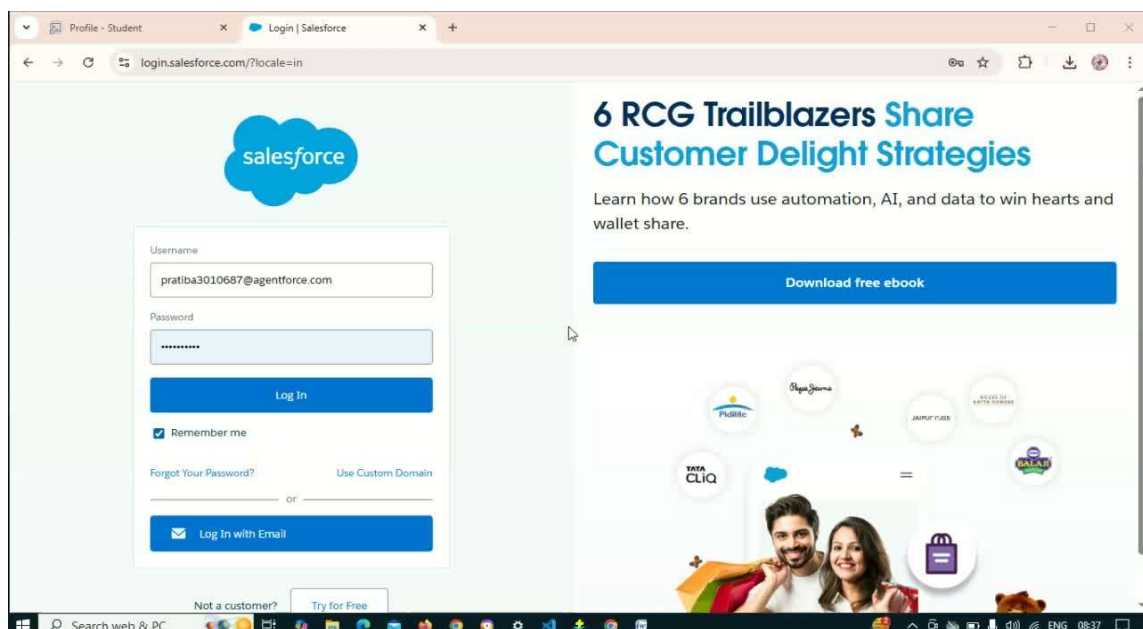
The Garage Management System is a Salesforce-based CRM solution designed to streamline garage operations. It helps in managing customer details, vehicle information, bookings, services, invoices, and payments efficiently. The system enhances customer engagement, ensures better tracking of services, and automates routine tasks.

Objective

This SOP outlines the steps to create and manage a Garage Management System using Salesforce CRM, ensuring all team members can follow the process effectively.

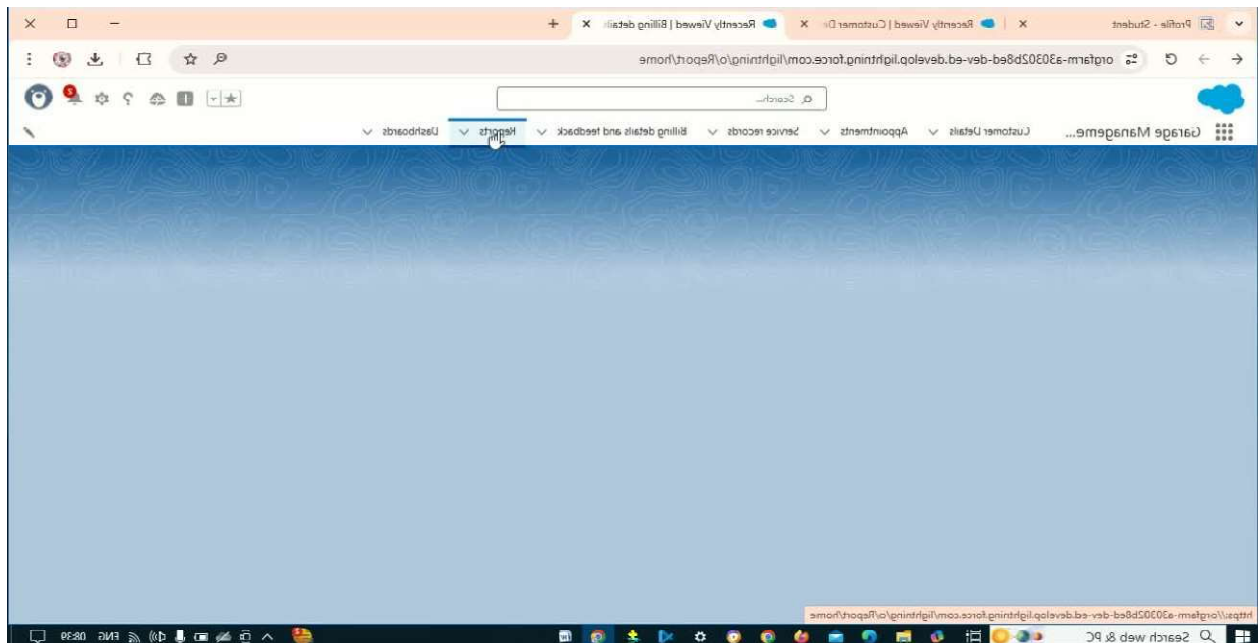
Key Steps

1. Project Overview and Goals



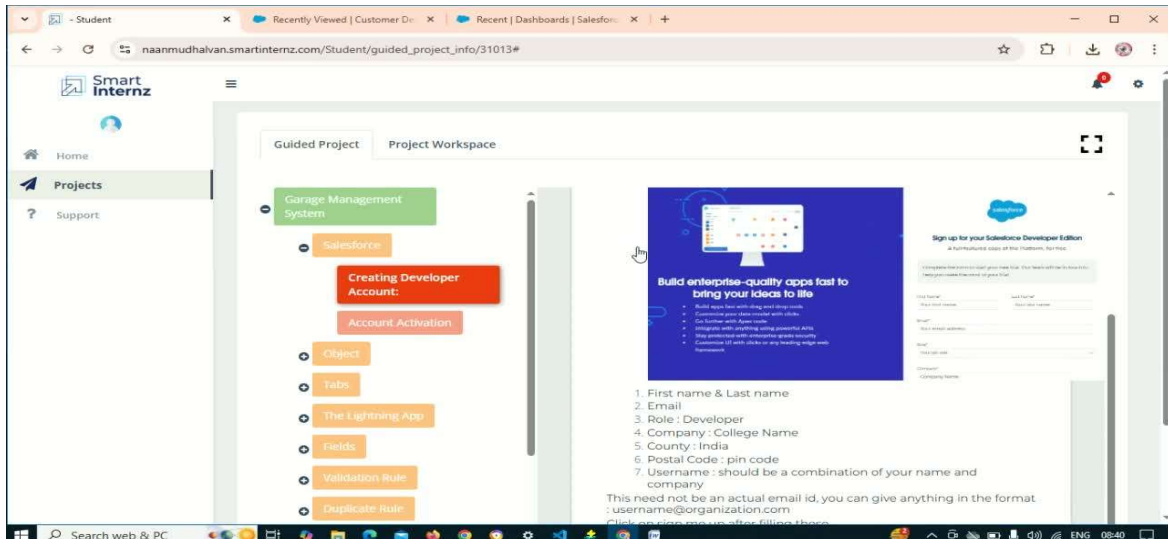
- Introduce the Garage Management System project created using Salesforce CRM.
- Main business goal: Automate garage operations including customer and vehicle management.

2. Accessing the Application



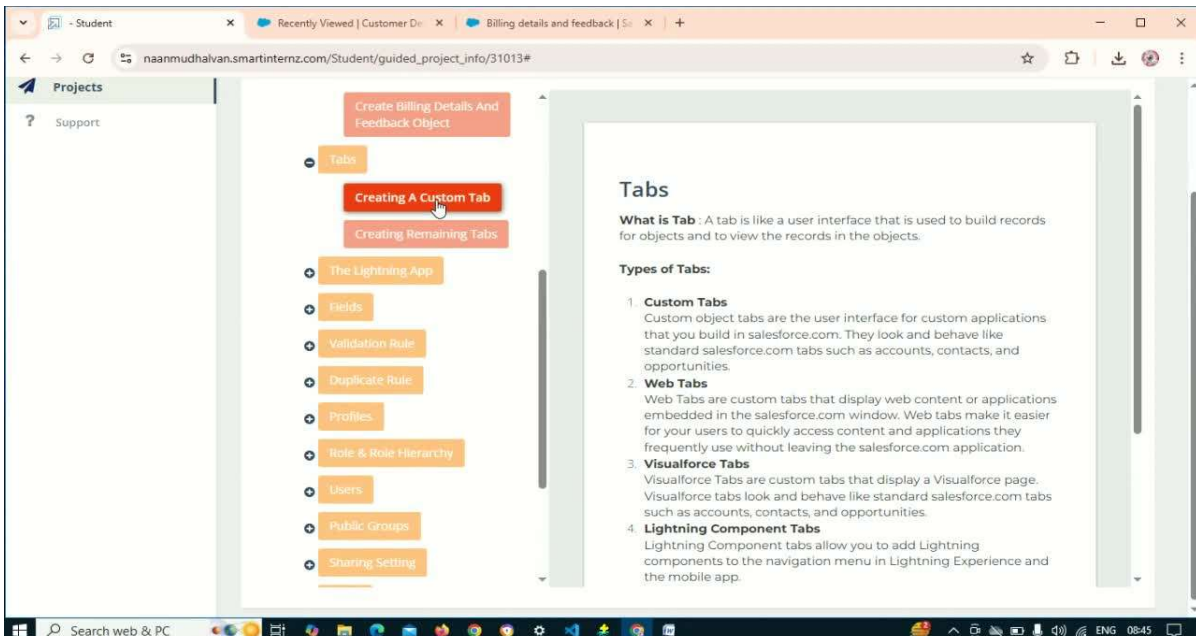
- Navigate to the home page of Salesforce.
- Click on the app launcher and search for the 'Garage Management Application'.

3. Creating Custom Objects



- Open Setup and go to Object Manager.
- Create the following custom objects:
- Customer Details (fields: Name, Phone Number)
 - Appointments (fields: Vehicle Number Plate, Service Amount, Replacement Parts, etc.)
 - Service Records (fields: Quality Check Status, Service Date, etc.)
 - Billing Details and Feedback (fields: Payment Status, Rating, etc.)

4. Creating Custom Tabs



The screenshot shows a web browser window with a guided project titled "Creating Custom Tabs". The left sidebar contains a navigation menu with the following items: "Support", "Tabs", "The Lightning App", "Fields", "Validation Rule", "Duplicate Rule", "Profiles", "Role & Role Hierarchy", "Users", "Public Groups", and "Sharing Setting". The "Tabs" item is selected, and a sub-menu is visible with "Create Billing Details And Feedback Object", "Creating A Custom Tab" (highlighted with a red box and a cursor), and "Creating Remaining Tabs". The main content area is titled "Tabs" and contains the following text:

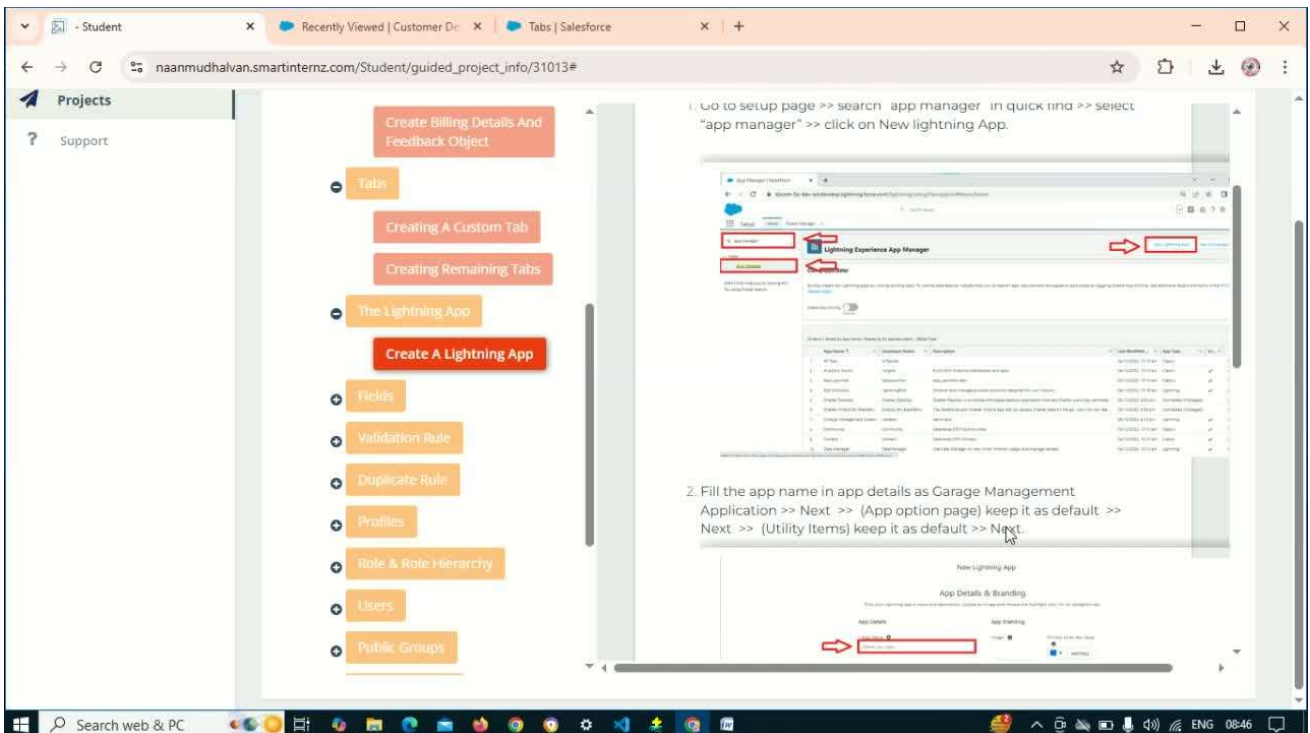
What is Tab : A tab is like a user interface that is used to build records for objects and to view the records in the objects.

Types of Tabs:

- Custom Tabs**
Custom object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.
- Web Tabs**
Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window. Web tabs make it easier for your users to quickly access content and applications they frequently use without leaving the salesforce.com application.
- Visualforce Tabs**
Visualforce Tabs are custom tabs that display a Visualforce page. Visualforce tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.
- Lightning Component Tabs**
Lightning Component tabs allow you to add Lightning components to the navigation menu in Lightning Experience and the mobile app.

- Use the Quick Find box to create custom tabs for:
 - Customer Details
 - Appointments
 - Service Records
 - Billing Details and Feedback.

5. Setting Up Lightning App



The screenshot shows a web browser window with a guided project titled "Setting Up Lightning App". The left sidebar contains a navigation menu with the following items: "Support", "Tabs", "The Lightning App", "Fields", "Validation Rule", "Duplicate Rule", "Profiles", "Role & Role Hierarchy", "Users", "Public Groups", and "Sharing Setting". The "The Lightning App" item is selected, and a sub-menu is visible with "Create A Lightning App" (highlighted with a red box and a cursor). The main content area contains the following instructions:

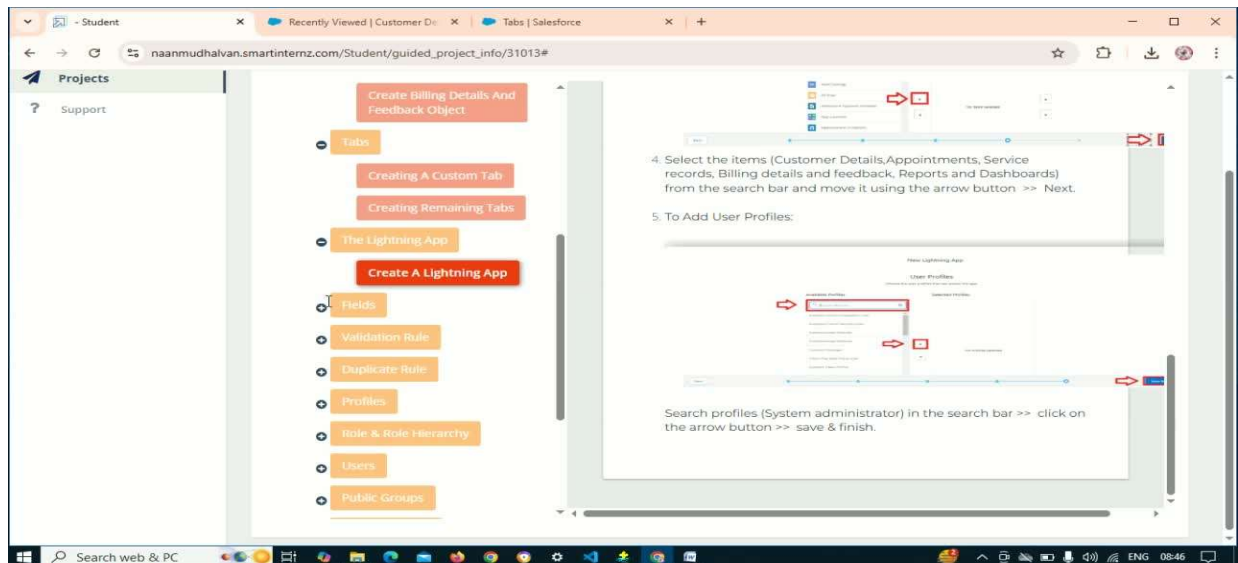
1. Go to setup page >> search app manager in quick find >> select "app manager" >> click on New lightning App.

2. Fill the app name in app details as Garage Management Application >> Next >> (App option page) keep it as default >> Next >> (Utility Items) keep it as default >> Next.

The screenshot also shows a screenshot of the Salesforce "New Lightning App" page. The "App Details" section is highlighted with a red box, and the "App Name" field is filled with "Garage Management". The "App Branding" section is also visible, with the "App Logo" field highlighted with a red box.

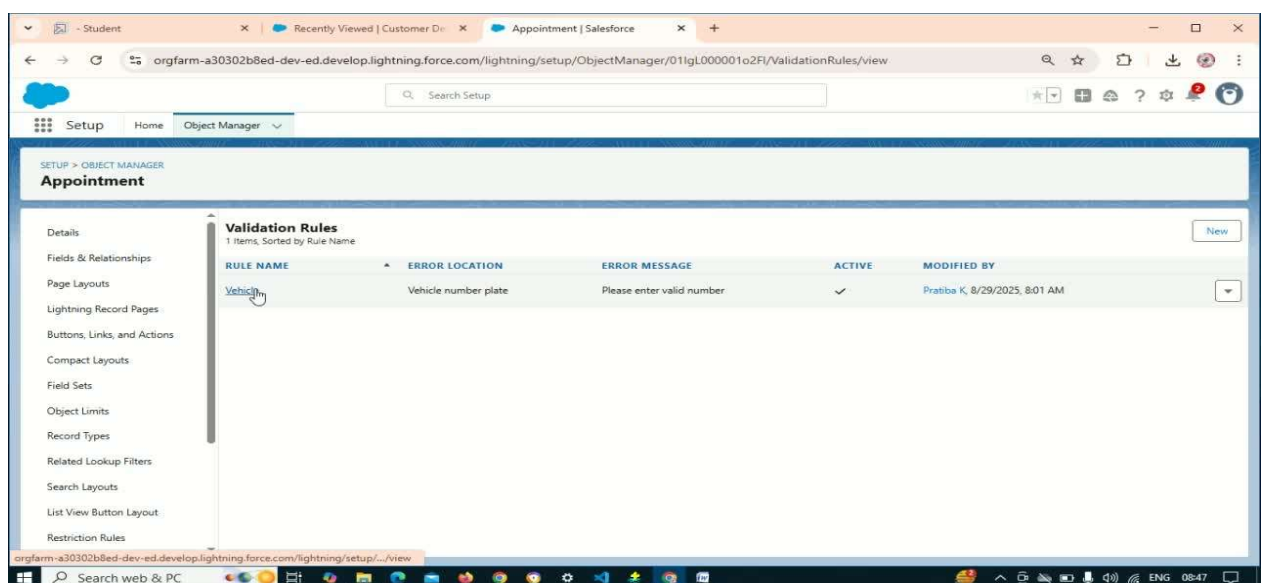
- Create a Lightning App using the Lightning App Manager.
- Include the following in the navigation bar:
 - Customer Details
 - Appointments
 - Service Records
 - Reports and Dashboards.

6. Creating Fields and Relationships



- For each custom object, create necessary fields:
 - Lookup Relationships
 - Checkbox, Date, Currency, Text Fields, Picklist Fields, and Formula Fields.

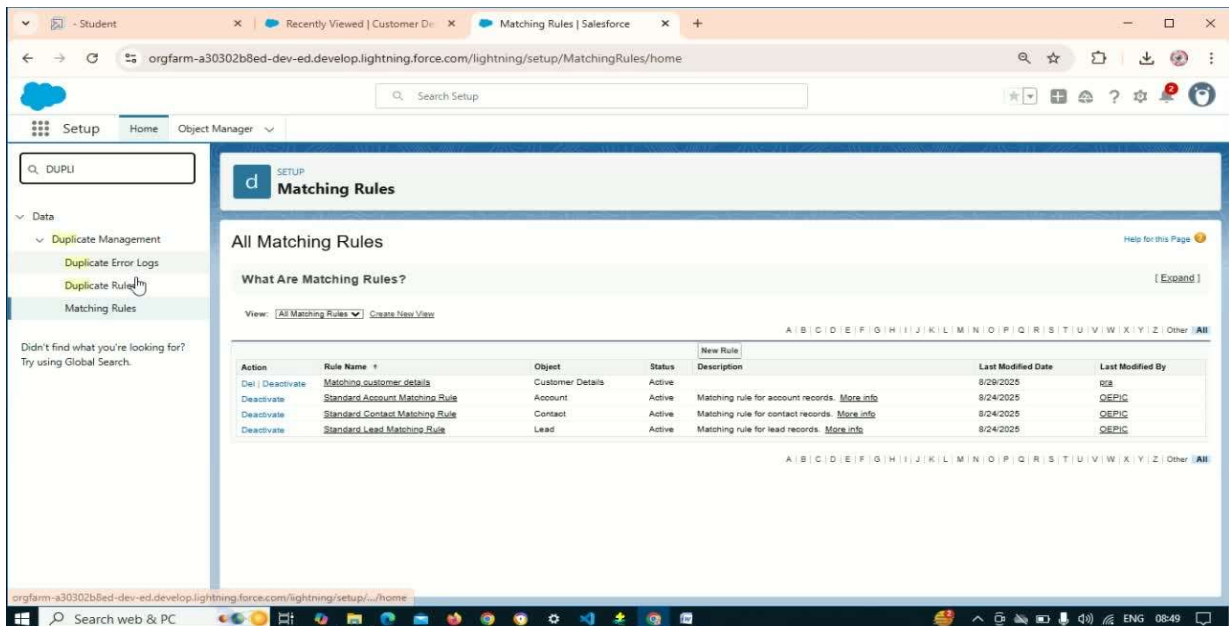
7. Implementing Validation Rule



- Create validation rules for:
 - Appointment Object (e.g., Vehicle Number Plate)
 - Building Details
 - Duplicate Rules for Customer Details.

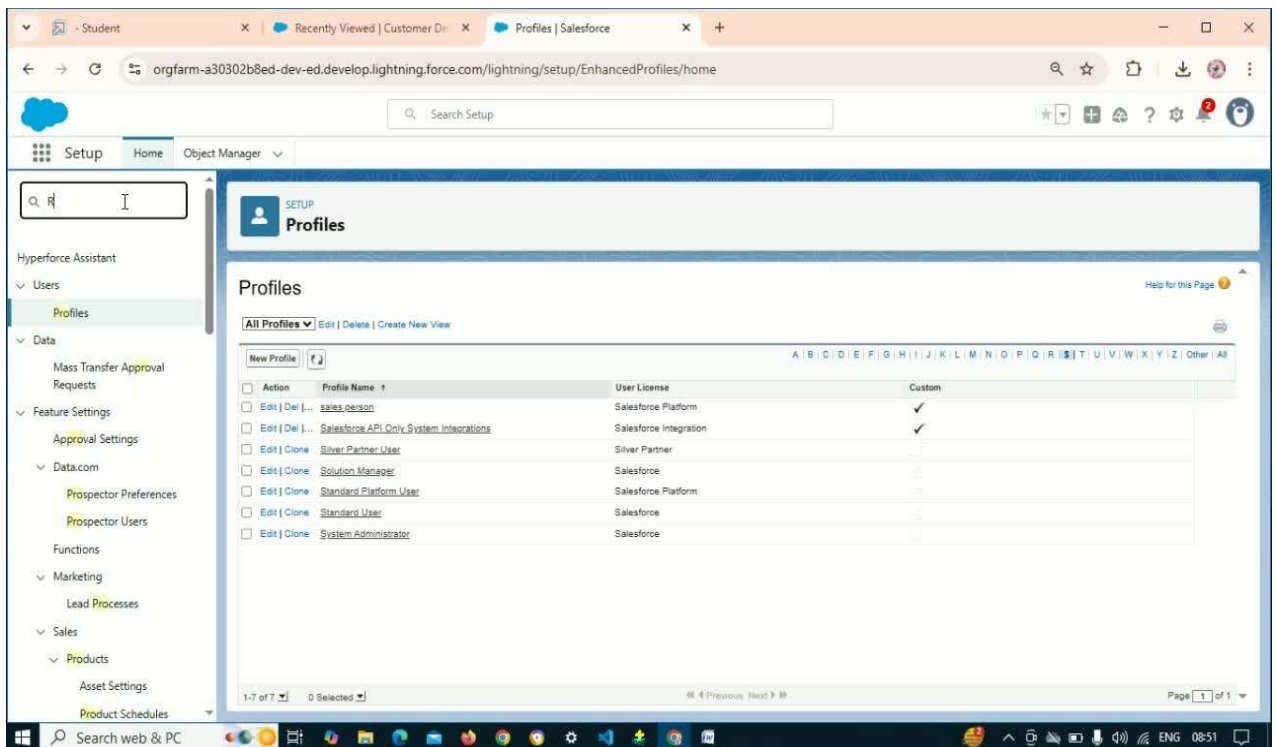
8. Setting Up User Profiles

- Create two user profiles:
 - Manager
 - Salesperson (clone from Standard User).



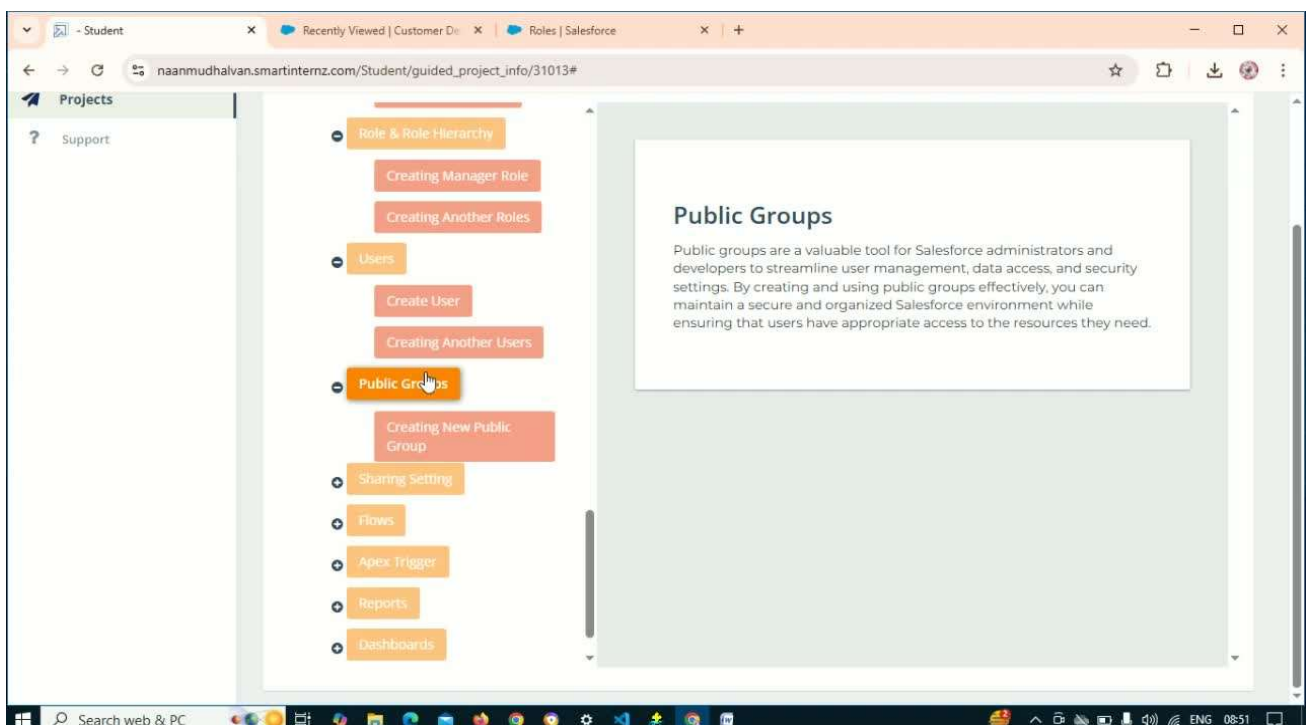
9. Configuring Role Hierarchy and Users

- Set up role hierarchy using Setup.
- Create users (e.g., Nicholas, McCullers, Kilson, Michelson).
- Create more users for better experiences .



10. Creating Public Groups

- Create public groups using the Quick Find box.



11. Configuring Sharing Settings

The screenshot shows the Salesforce Setup interface. On the left, a navigation menu lists various setup areas: Projects, Support, Users, Public Groups, Sharing Setting (highlighted), Flows, Apex Trigger, Reports, Dashboards, and User Adoption. The main content area displays information about sharing rules, including Organization-Wide Default (OWD) Settings, Role Hierarchy, Profiles and Permission Sets, and Sharing Rules. The text explains that OWD settings define the default level of access for all objects within the Salesforce org, and that Role Hierarchy is used to determine record access based on the hierarchy of roles.

sharing rules, such as:

Organization-Wide Default (OWD) Settings:

These settings define the default level of access for all objects within your Salesforce org. OWD settings include Private, Public Read-Only, Public Read/Write, and Controlled by Parent. OWD settings can be configured for each standard and custom object.

Role Hierarchy:

Salesforce uses a role hierarchy to determine record access. Users at higher levels in the hierarchy have greater access to records owned by or shared with users lower in the hierarchy. The role hierarchy is often used in combination with OWD settings to grant different levels of access.

Profiles and Permission Sets:

Profiles and permission sets allow administrators to specify object-level and field-level permissions for users. Profiles are typically used to grant general object and field access, while permission sets can be used to extend those permissions to specific users.

Sharing Rules:

Sharing rules are used to extend access to records for users who meet specific criteria.

- Configure sharing settings to control record access within the organization.

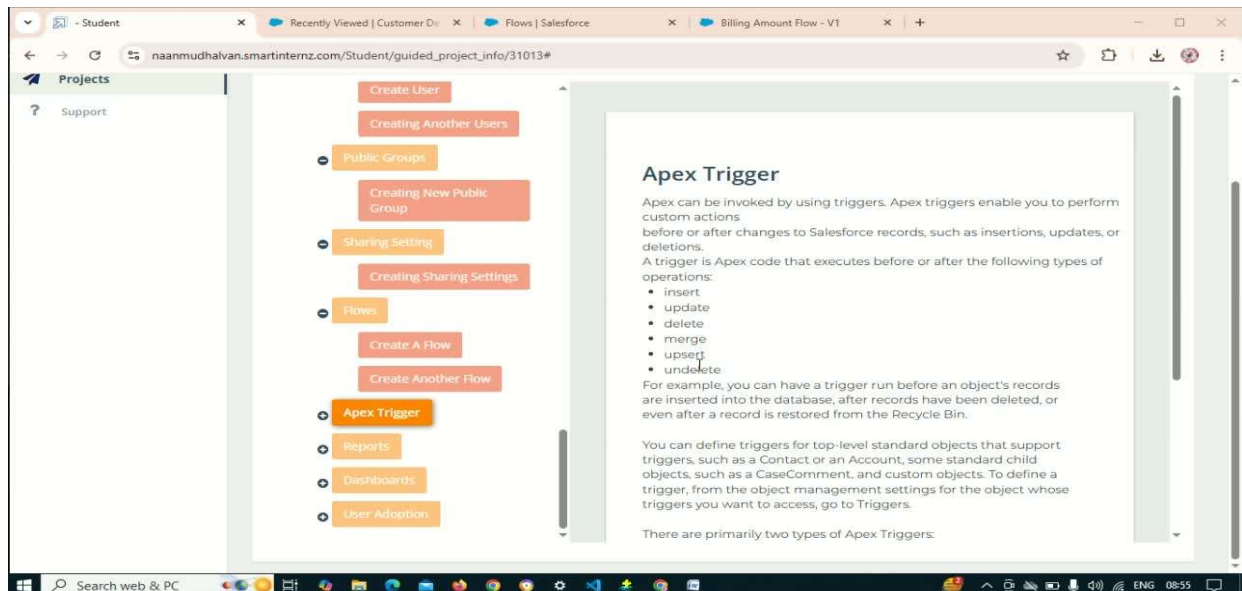
12. Creating Flows

The screenshot shows the Salesforce Setup interface for Flows. The left navigation menu includes Setup, Home, Object Manager, and a search bar. The main content area displays the 'Flows' setup page, which includes a 'Flow Definitions' section. Below this, a table lists various flows, their process types, and their status.

Flow Label	Process Type	Active	Temp...	Package State	Pack...	Last M...	Last Modified ...
Add or Modify Service Appointment Attendees	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Approvals Workflow: Evaluate Approval Requests	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Approvals Workflow: Process Approval Submission	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			
Authentication Provider User Registration	Identity User Registration Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Basic Approval Request	Flow Orchestration for CMS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Billing Amount Flow	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Unmanaged		Pratiba K	9/1/2025, 3:27 AM
Book Appointment from Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Change Case Owner to Incident Owner	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Chats Routed to Agents and Queues	Omni-Channel Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Chats Routed to Agents with the Right Skills	Omni-Channel Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Check Flow API Name	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			

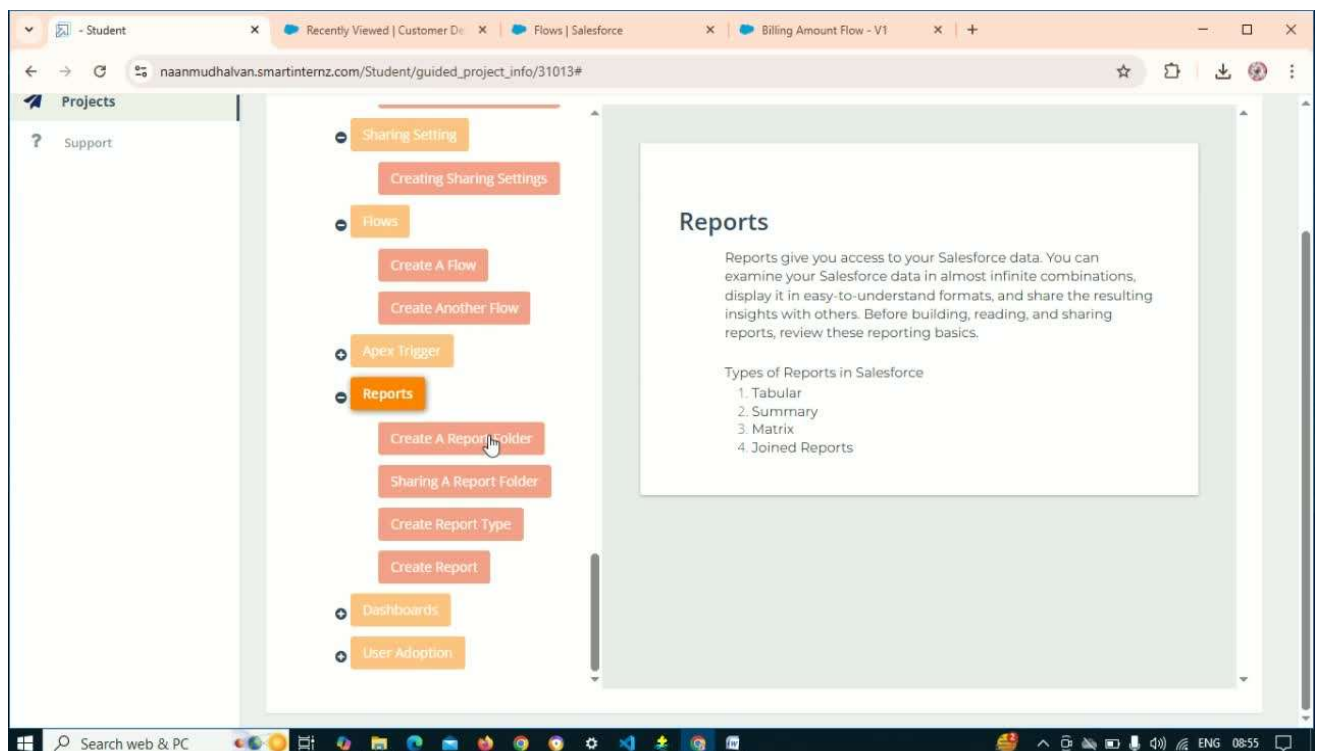
- Create flows for:
 - Email Alerts
 - Building Amount Flow
 - Service Update Flow.

13. Using Apex Triggers



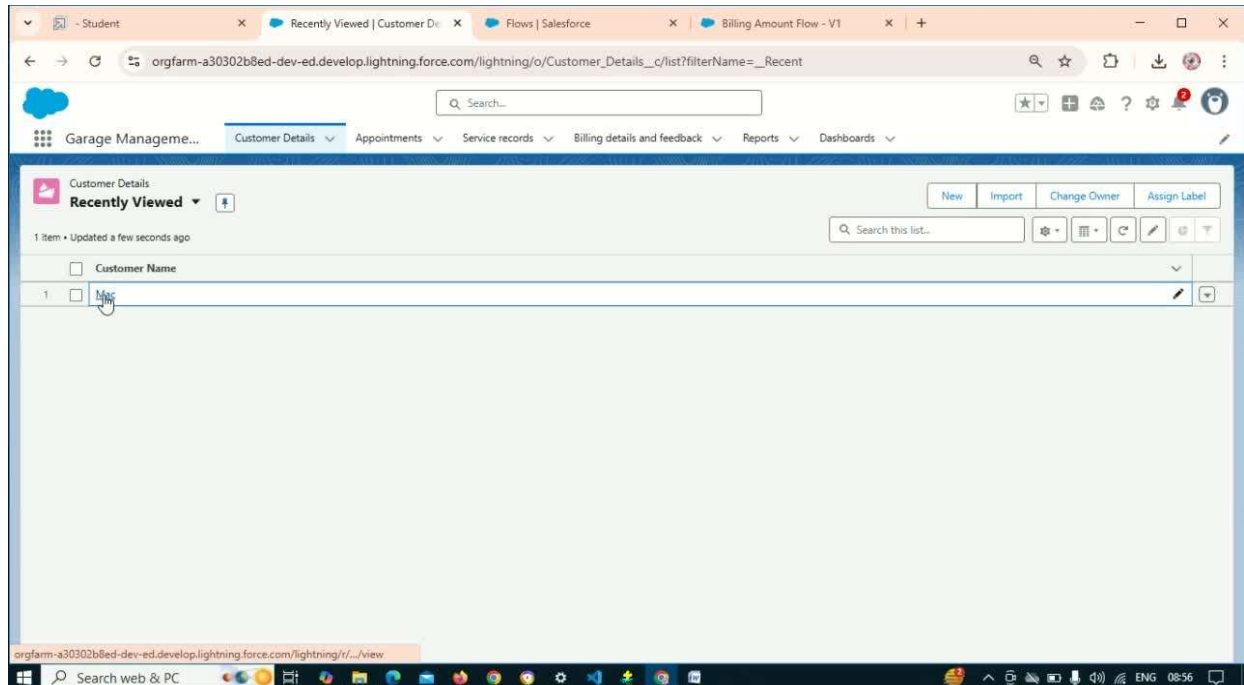
- Implement Apex triggers for operations such as insert, update, delete, and merge.

14. Creating Reports and Dashboards



- Create a folder for reports and add a new service information report.
- Create a dashboard folder and a service rating dashboard.

15. Creating Records



- Create records for:
 - Customer (e.g., Name: Mac, Phone Number)
 - Appointments
 - Service Records
 - Billing Details.

Cautionary Notes

- Ensure all custom objects and fields are properly defined before creating relationships.
- Validate all data entries to avoid duplicates and errors.

Tips for Efficiency

- Regularly back up your Salesforce data to prevent loss.
- Use templates for reports and dashboards to save time on future projects.
- Document any changes made to the system for future reference.

Conclusion

The Garage Management System, built on Salesforce CRM, streamlined service bookings, customer management, and payments while delivering insightful reports, automating operations for improved efficiency and customer satisfaction.