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GARAGE MANAGEMENT SYSTEM PROJECT REPORT

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Team GitHub Link: https://github.com/hrs7x/GarageManagementSystem_Salesforce_NM



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Summary

- **Objective:** To automate and streamline garage operations, including appointment scheduling, service tracking, and customer feedback.
- **Key Points:**
 - Enhanced operational efficiency through Salesforce automation.
 - Integrated dashboards for actionable insights.
 - Developed robust systems for tracking services and payments.
- **Tools Used:**
 - Salesforce (Objects, Flows, Reports, Dashboards).

Introduction

a. Problem Statement

Manual processes in garages are prone to inefficiencies, errors, and delays. These challenges hinder customer satisfaction and operational growth.

b. Objectives

- Create a centralized system for managing garage operations.
- Enable tracking of services, payments, and customer feedback.
- Provide real-time insights into performance metrics through reports and dashboards.

c. Scope of the Project

- **In-Scope:** Appointment scheduling, service record management, payment tracking, customer feedback.
- **Out-of-Scope:** Integration with external systems like inventory or advanced CRM features.

System Design

a. Object and Relationship Overview

- Objects: **Appointments, Service Records, Payments, Customers.**
- Relationships:
 - **Appointments** → Linked to **Service Records**.



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- **Payments** → Related to **Service Records**.

b. System Architecture

- **Input:** Appointment booking by users.
- **Process:** Service Record creation, Payment Status update.
- **Output:** Dashboards and reports for analysis.

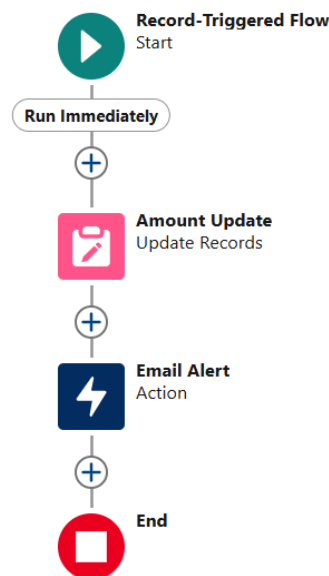
Implementation

a. Object Creation

- **Appointments Object:** Captures date, customer, and service details.
- **Service Records Object:** Maintains service details, amount, and completion status.
- **Payments Object:** Tracks payment status (Pending or Completed).

b. Automation

- **Flow for Updating Service Records:**
 - Trigger: Appointment creation.
 - Action: Automatically create a linked Service Record and populate fields (e.g., Service Amount__C).
 - Screenshot of the **Flow**:



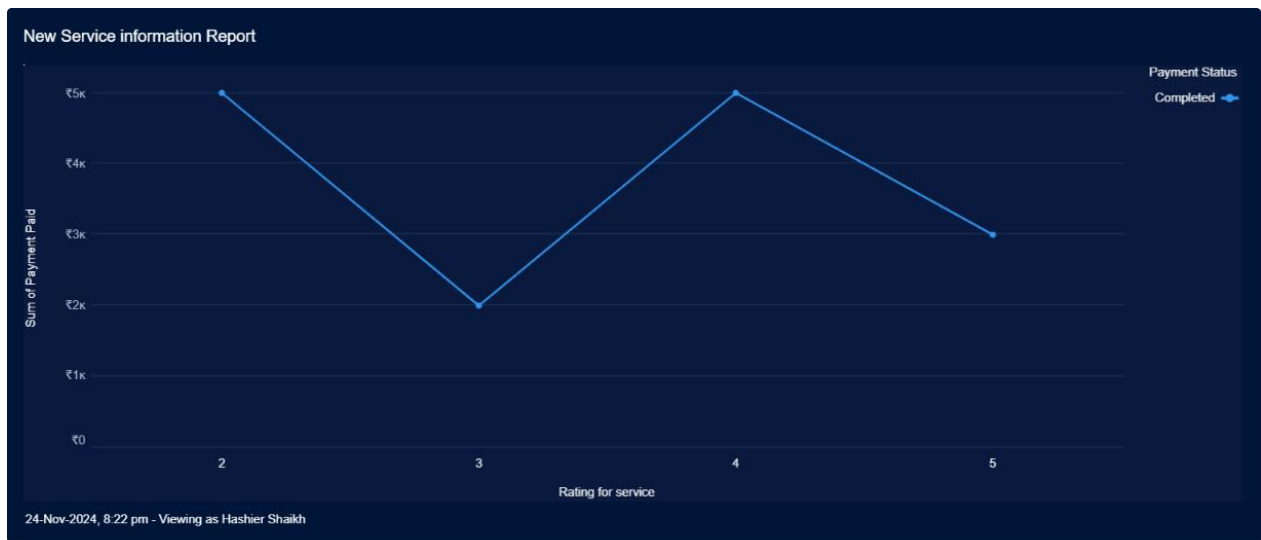


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c. Dashboard and Reports

- **Dashboard Name:** *Customer Review and Payment Insights.*
 - Component 1: *Rating vs. Payment Graph* (Line Graph).
 - X-axis: Customer Rating.
 - Y-axis: Total Payment Collected.
 - Screenshot of Dashboard Graph:



Results

a. Achieved Metrics

- **Total Appointments Managed.**
- **Revenue Generated.**
- **Average Customer Rating.**
- **Payment Completion Rate.**

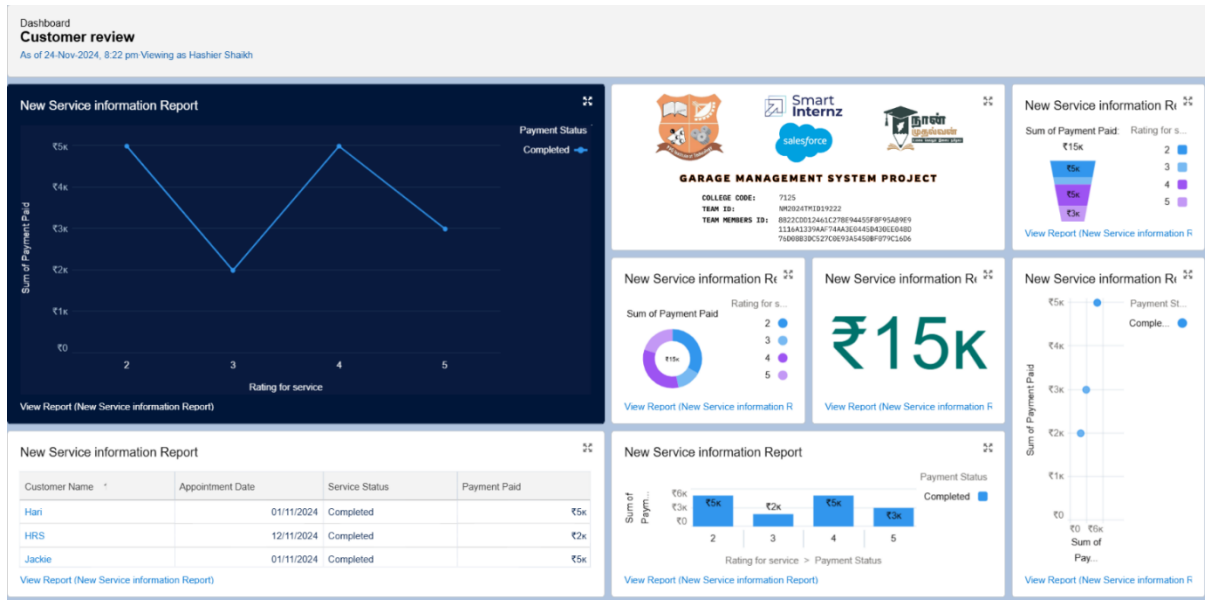


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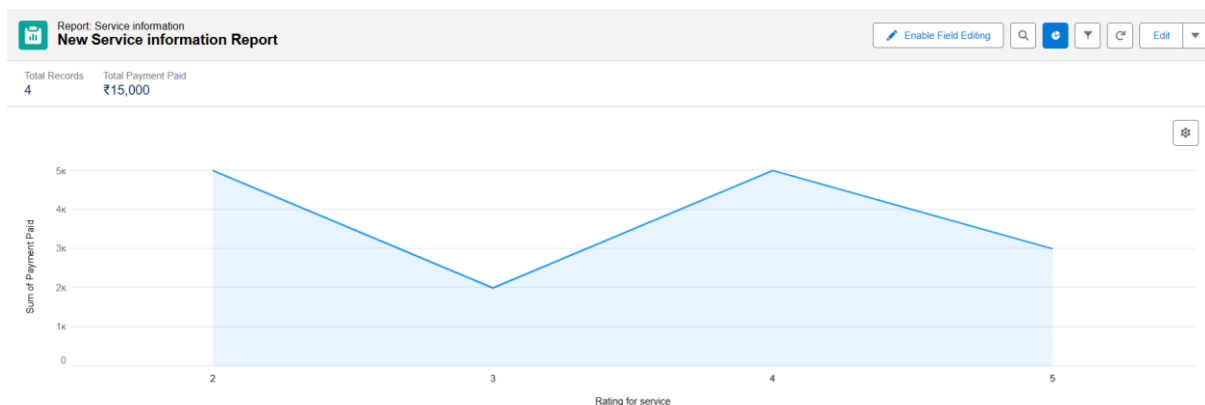
b. Dashboard Insights

Screenshot of the **interactive dashboard** showing service and payment data:



c. Reports

- Report 1: *Appointment Summary Report*: Details of appointments with service status.
 - Screenshot of **Report**:





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| <input type="checkbox"/> Rating for service ↑ ▾ | <input type="checkbox"/> Payment Status ↑ ▾ | <input type="checkbox"/> Customer Name ▾ | <input type="checkbox"/> Appointment Date ▾ | <input type="checkbox"/> Service Status ▾ | <input type="checkbox"/> Payment Paid ▾ |
|---|---|--|---|---|---|
| <input type="checkbox"/> 2 (1) | Completed (1) | Jackie | 01/11/2024 | Completed | ₹5,000 |
| | Subtotal | | | | ₹5,000 |
| Subtotal | | | | | ₹5,000 |
| <input type="checkbox"/> 3 (1) | Completed (1) | HRS | 12/11/2024 | Completed | ₹2,000 |
| | Subtotal | | | | ₹2,000 |
| Subtotal | | | | | ₹2,000 |
| <input type="checkbox"/> 4 (1) | Completed (1) | Hari | 01/11/2024 | Completed | ₹5,000 |
| | Subtotal | | | | ₹5,000 |
| Subtotal | | | | | ₹5,000 |
| <input type="checkbox"/> 5 (1) | Completed (1) | Mac | 05/07/2024 | Completed | ₹3,000 |
| | Subtotal | | | | ₹3,000 |
| Subtotal | | | | | ₹3,000 |
| Total (4) | | | | | ₹15,000 |

- Report 2: *Customer Feedback Analysis*: Ratings aggregated with payment status.

Conclusion

The Garage Management System efficiently addresses the challenges of manual operations. It provides a scalable and user-friendly solution for managing appointments, tracking services, and monitoring customer satisfaction.

----- Thank You -----