NAAN MUDHALVAN SKILLDEVELOPMENT PROGRAM

SB 8067 – SALESFORCE DEVELOPER

A SKILL TRAINING REPORT

Submitted by

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GARAGE MANAGEMENT SYSTEM

PROJECT DEFINITION :

The **Garage Management System (GMS)** is a comprehensive **Salesforce CRM-based application** designed to simplify and automate the operations of automobile repair facilities. Traditional garage operations often rely on manual processes that can lead to inefficiencies, errors, and delays. This system replaces such manual work with a digital platform that organizes data, improves efficiency, and enhances customer satisfaction.

GMS allows garages to record customer details, manage vehicle information, schedule and track repair jobs, generate invoices, and monitor performance through dashboards and reports. By integrating multiple Salesforce features such as **custom objects**, **validation rules**, **flows**, **Apex triggers**, and **reports**, it delivers a smooth and user-friendly experience for both customers and administrators.

ABSTRACT :

The **Garage Management System** leverages **Salesforce Cloud Technology** to address the operational challenges faced by automobile repair centers. It enables garages to manage key business areas — from **customer registration**, **vehicle tracking**, and **service scheduling**, to **billing** and **reporting** — all within one centralized CRM platform.This project involves the creation of several **custom objects** (Customer, Vehicle, Service Request, Invoice) and the use of **automation tools** like **Flows** and **Apex Triggers** to ensure speed.

Additionally, **validation rules** prevent data entry errors, **duplicate rules** maintain record integrity, and **role hierarchies** control access based on job roles (e.g., Admin, Mechanic, Staff).The final application is a scalable, cloud-based management solution that enhances operational efficiency, strengthens customer relationships, and helps garages maintain consistent, high-quality service standards.

OBJECTIVES OF THE PROJECT :

The main goals of the Garage Management System are:

- **To digitalize garage operations** by developing a Salesforce-based management system.
- **To automate key processes** such as service request creation, billing, and reporting.
- **To ensure accuracy** in data entry using validation and duplicate rules.
- **To improve customer satisfaction** by offering quick, reliable, and transparent service.
- **To enhance security and access control** through roles, profiles, and sharing settings.
- **To monitor business performance** using Salesforce reports and dashboards.
- **To provide a scalable and user-friendly interface** for both administrators and garage employees.

SOFTWARE REQUIREMENTS :

Platform

- Salesforce CRM (Cloud-based)

Software Tools

- Salesforce Developer Console
- Visual Studio Code with Salesforce CLI
- Salesforce Setup and App Builder
- Web Browser (Google Chrome / Edge)

Operating System

- Windows 10 or higher / macOS

Database

- Salesforce Cloud Database (Objects and Relationships)

MODULES IN THE SYSTEM:

- Tabs
  - Creating A Custom Tab
  - Creating Remaining Tabs
- The Lightning App
  - Create A Lightning App
- **Fields**
  - Creation Of Fields For The Customer Details Object
  - Creation Of Lookup Fields
  - Creation Of Checkbox Fields

- Creation Of Date Fields
- Creation Of Currency Fields
- Creation Of Text Fields
- Creation Of Picklist Fields
- Creating Formula Field In Service Records Object

- **Validation Rule**
  - To Create A Validation Rule To An Appointment Object
  - To Create A Validation Rule To An Billing Details And Feedback Object

- Duplicate Rule
  - **To Create A Matching Rule To An Customer Details Object**
  - To Create A Duplicate Rule To An Customer Details Object

- Profiles
  - Manager Profile
  - Sales Person Profile

- Role & Role Hierarchy
  - Creating Manager Role
  - Creating Another Roles

- Users
  - Create User
  - Creating Another Users
- Public Groups
  - Creating New Public Group
- Sharing Setting
  - Creating Sharing Settings
- **Flows**
  - Create A Flow

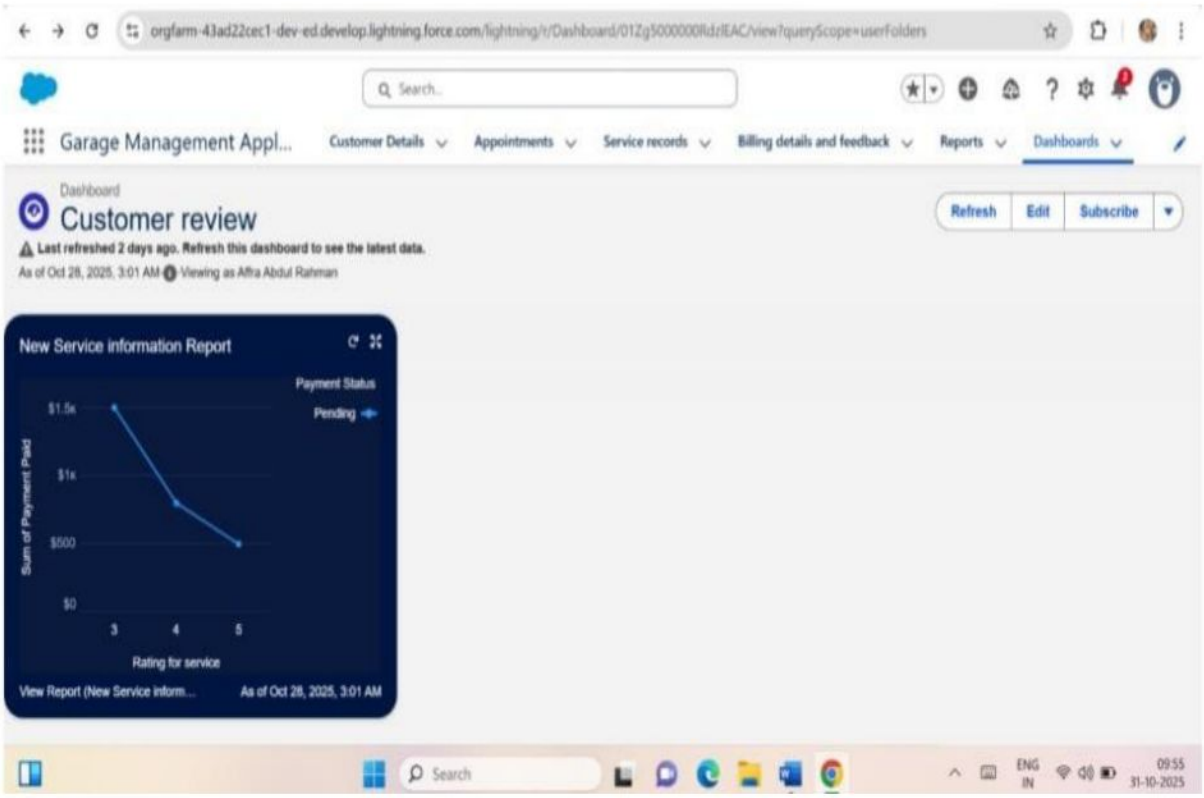
- Apex Trigger
  - Apex Handler
- Reports
  - Create A Report Folder
  - Sharing A Report Folder
  - Create Report Type
  - Create Report
- Dashboards
  - Create Dashboard Folder
  - Create Dashboard
- **User Adoption**
  - Creating Records

IMPLEMENTATION DETAILS

- **Custom Objects Created:**
  - Customer
  - Vehicle
  - Service Request
  - Invoice
- **Relationships:**
  - Customer → Vehicle (Lookup Relationship)
  - Vehicle → Service Request (Master-Detail)
  - Service Request → Invoice (Master-Detail)
- **Custom Fields:**
  - Vehicle Model, Vehicle Number, Mechanic Assigned, Service Status, Cost, Payment Mode, etc.
- **Validation Rules:**
  - Ensure all mandatory fields (like Vehicle Number, Customer Name, Service Date) are entered before saving.
  - Prevent invalid data such as negative service costs.
- **Duplicate Rules:**
  - Prevents multiple records for the same customer or vehicle number.
- **Flows:**
  - Automatically assign service requests to available mechanics.
  - Update service status upon completion.
- **Apex Trigger:**
  - Automatically creates an invoice when the service status changes to "Completed."
- **Profiles & Role Hierarchies:**
  - Admin → Full Access
  - Staff → Limited Access
  - Mechanic → Restricted Access
- **Reports & Dashboards:**
  - Created for tracking monthly service requests, revenue, and staff performance.

- **Sharing Settings:**
    - Configured to restrict data access and maintain privacy between users.

OUTPUT SCREENSHOTS :



Conclusion :

The **Garage Management System (GMS)** successfully demonstrates the power of Salesforce as a low-code, scalable platform for building enterprise-grade applications. By digitizing garage operations, it enables improved customer management, efficient service scheduling, real-time billing, and insightful performance tracking.

Through features like **Flows**, **Apex Triggers**, **Reports**, and **Dashboards**, the system enhances automation and transparency. It also ensures secure access management using **Profiles**, **Roles**, and **Sharing Settings**.

Overall, the project meets its objectives of improving productivity, reducing manual errors, and delivering a superior experience for both customers and garage staff. This Salesforce-based solution can be further expanded with advanced modules like inventory management, SMS notifications, or online booking integration.