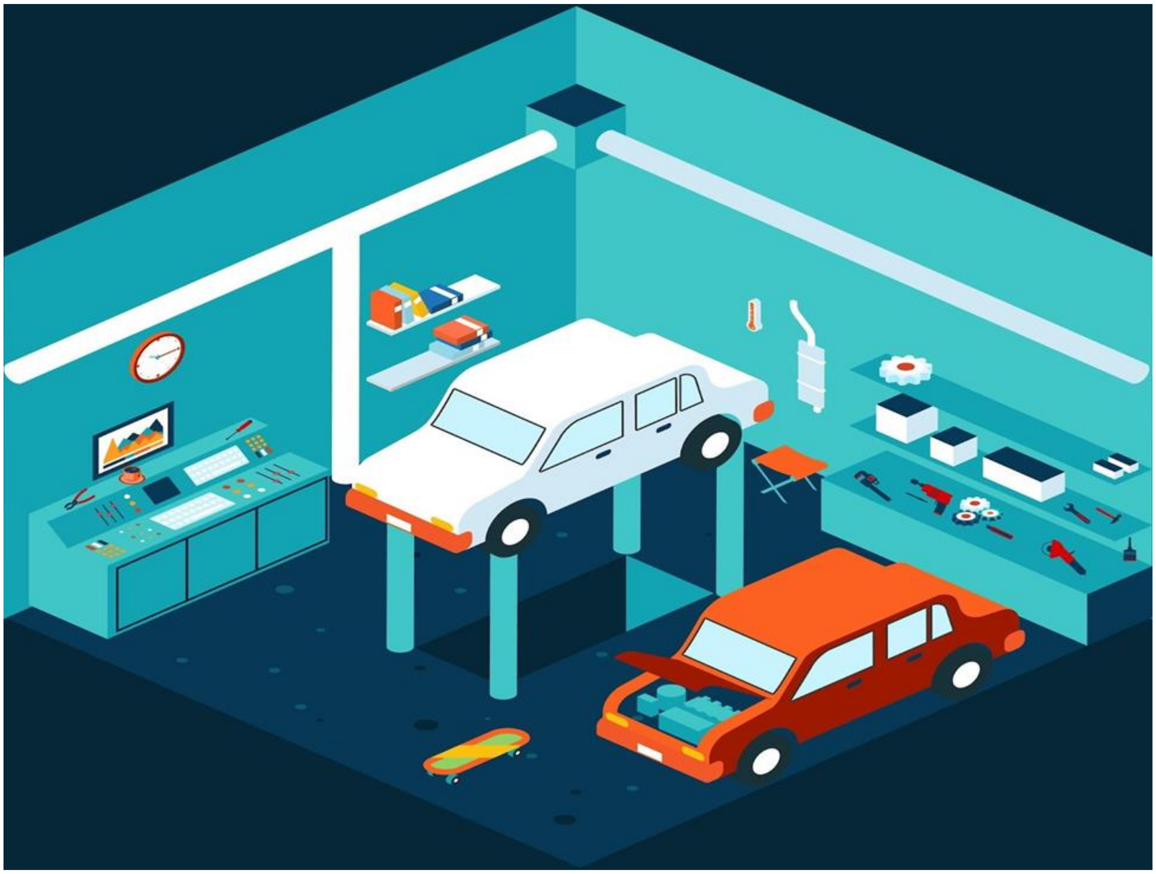
GARAGE MANAGEMENT SYSTEM



Project By

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SALESFORCE

Salesforce is a cloud-based software company that provides customer relationship management (CRM) services. Its primary product is a CRM system that helps businesses manage their relationships and interactions with customers and potential customers. Salesforce's CRM platform includes tools for sales, customer service, marketing automation, analytics, and application development.

SALESFORCE ACCOUNT CREATION

To create a Salesforce development account, you need to sign up for a free Salesforce Developer Edition account. This account gives you access to all the features and tools required for Salesforce development, including Apex, Visualforce, Lightning Components, and more.

create a Salesforce Developer Edition account:

1. **Go to the Salesforce Developer Edition Sign-up Page:**

   Visit Salesforce Developer Edition Sign-up.

2. **Fill in the Required Information:**

   1.Enter your first and last name.

   2.Provide your email address (use a valid email since you'll need to verify it).

   3.Choose your role (e.g., Developer, Administrator).

4.Enter your company name (you can use "Self" if you’re not currently with a company).

5.Enter your country.

6.Choose a unique username. The format usually requires an email address, but it doesn’t need to be a working email.

3. **Agree to the Terms and Conditions:**

Check the box to agree to the Salesforce terms of use.

4. **Click "Sign Me Up":**

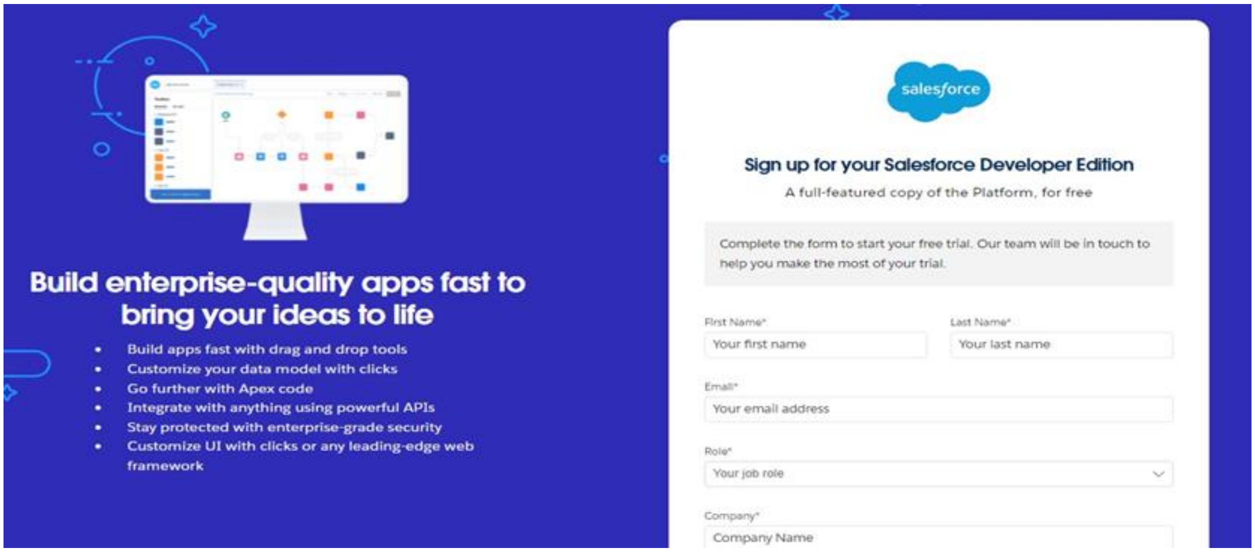
After completing the form, click the "Sign Me Up" button.

5. **Verify Your Email:**

Salesforce will send a verification email to the address you provided. Open the email and click the verification link.

6. **Login to Your New Salesforce Account:**

After verifying your email, you can log in with the username and password you set up during registration.



Steps to Create a Custom Object in Salesforce:

Log In to Salesforce:

Log in to your Salesforce Developer Edition or any Salesforce environment where you have the appropriate permissions.

Navigate to the Object Manager:

Click the gear icon (□) in the top-right corner and select **Setup**.

In the Quick Find box on the left, type "Object Manager" and click on **Object Manager**.

Create a New Custom Object:

In the Object Manager, click the **Create** dropdown button on the right side and select **Custom Object**.

Define Object Properties:

1.Label: The name of the object (e.g., "Project").

2.Plural Label: The plural form of the object name (e.g., "Projects").

3.Object Name: This will automatically populate based on the label but can be adjusted.

4.Record Name: This field defines the primary field for your custom object. You can choose between a **Text** or **Auto Number** format.

Set Object-Level Security:

Specify who can see this object by adjusting the settings under **Optional Features** and **Object Creation Options**.

Add Fields and Relationships (Optional):

After creating the object, you'll be taken to the object's detail page, where you can start adding fields and relationships by clicking on **Fields & Relationships**.

Deploy the Object:

Once you've configured everything, ensure the object is deployed by checking the **Deploy** checkbox if it's not already enabled.

Save the Object:

Click **Save** to create the custom object.

Create a Lightning App:

- Go to Setup → App Manager → New Lightning App.

Log In to Salesforce:

Log in to your Salesforce environment where you have the necessary permissions.

Navigate to Setup:

Click the gear icon (□) in the top-right corner and select Setup.

Access the App Manager:

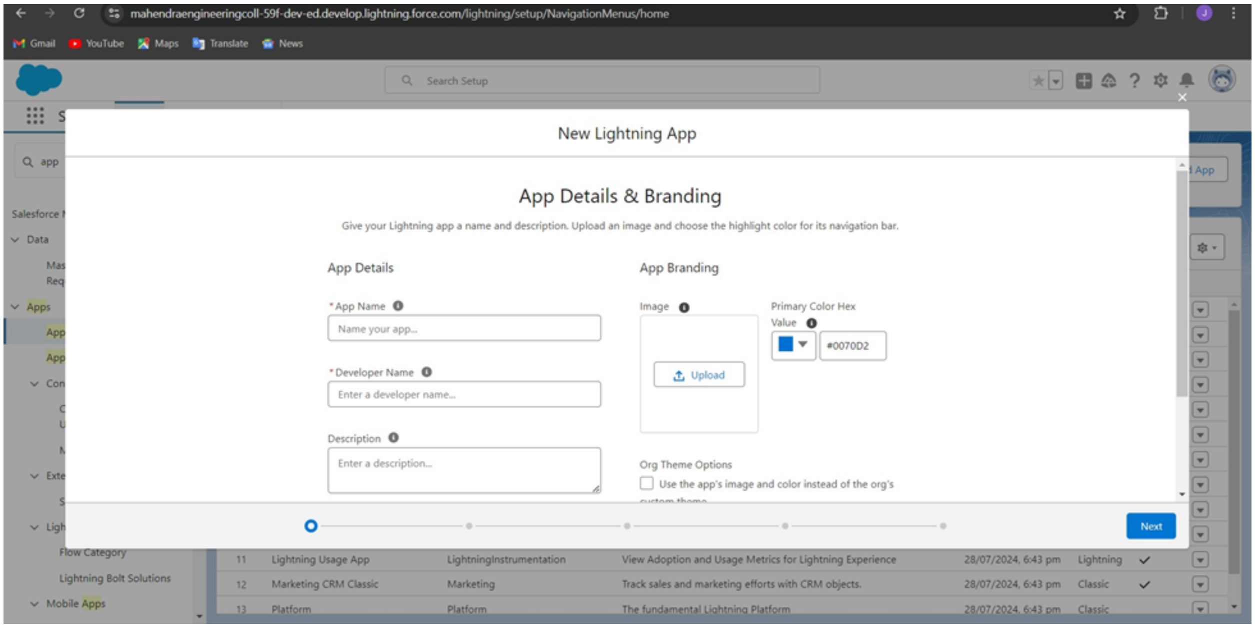
In the Quick Find box on the left side, type "App Manager" and click on App Manager.

Create a New Lightning App:

In the App Manager, click the New Lightning App button at the top right.

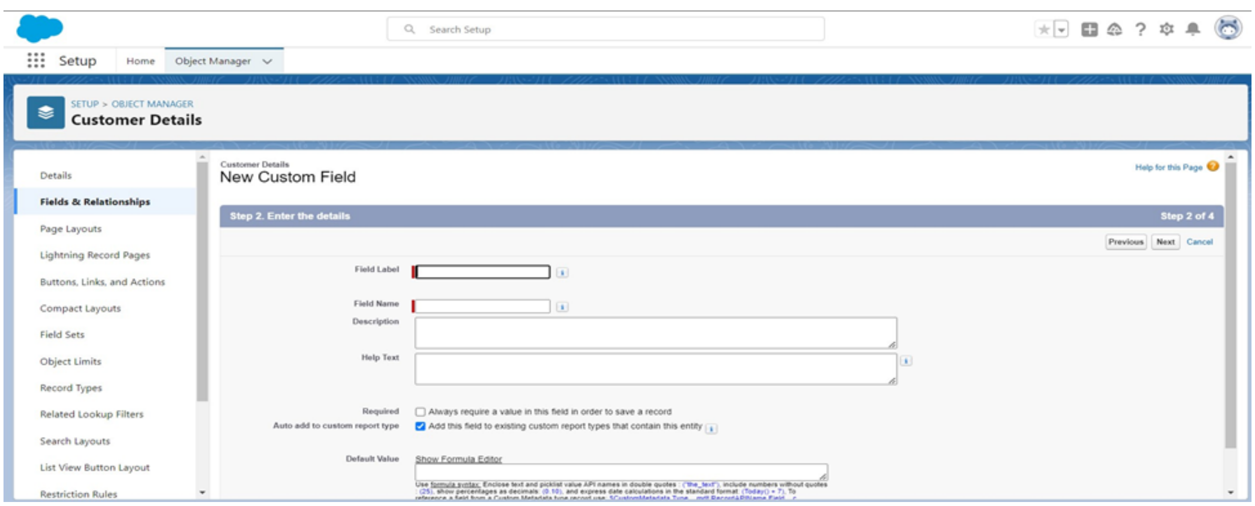
Define the App Details:

- **App Name:** Enter the name of your app (e.g., "Project Management").
- **Developer Name:** This will automatically populate based on the app name.
- **Description:** Optionally, provide a description of the app.
- **Primary Branding Color:** Choose a color for the app’s header (optional).
- **App Icon:** Choose an icon that will represent the app (optional).
- Click Next when done.



Navigate to Fields & Relationships:

- Go to Setup → Object Manager → Select the Object (e.g., Customer Details) → Fields & Relationships → New.



Create Field Types:

Text:

For fields like Phone Number or Vehicle Number Plate.

Date:

For fields like Appointment Date.

Currency:

For fields like Service Amount.

Checkbox:

For fields like Maintenance Service, Repairs.

Picklist:

For fields like Service Status or Payment Status. - Formula: For calculated fields like Service Date (use the formula function to calculate dates based on other fields).

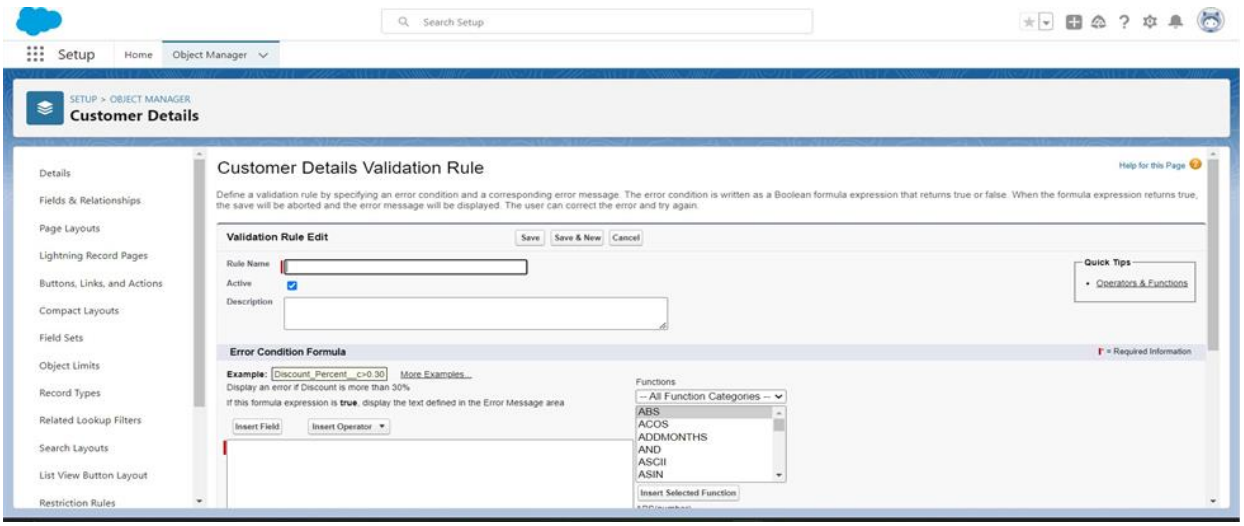
Validation Rules :

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

Rule Criteria:

- Enter the rule name, description, and criteria for validation.
- Use formulas to define the conditions that must be met for the data to be valid.

- Enter error messages to display when validation fails.



Save and Test Rules:

- Click Save to activate the rule.
- Test the rule by entering data into the system to ensure it works as intended.

Reports and Dashboards :

<u>Create a report</u>

Log in to Salesforce:

Log in to your Salesforce environment.

Navigate to the Reports Tab:

Click on the App Launcher (grid icon) and search for Reports. Click on the Reports tab.

Create a New Report:

Click the New Report button in the top right corner.

Choose a Report Type:

1.Select the appropriate Report Type based on the data you want to analyze. For example, if you want to create a report on Opportunities, select Opportunities.

2.Click Continue to proceed.

Customize the Report:

Add Filters: Set filters to narrow down the data. For example, filter by "Close Date" to view opportunities within a specific time frame.

Group Data: Group the data by a relevant field, such as "Stage" or "Owner."

Add Columns: Drag and drop fields from the left panel into the report to add more details (e.g., Amount, Close Date).

Summarize Data: Add summaries, such as totals or averages, to numeric columns.

Run and Save the Report:

Click Run to generate the report.

If you are satisfied with the report, click Save & Run.

Enter a Report Name, Description (optional), and select the folder where you want to save the report.

Click Save.

Create a dashboard

Navigate to the Dashboards Tab:

Click on the App Launcher (grid icon) and search for Dashboards. Click on the Dashboards tab.

Create a New Dashboard:

Click the New Dashboard button in the top right corner.

Define Dashboard Properties:

Enter the Dashboard Name (e.g., "Sales Performance Dashboard").

Add a Description (optional).

Select a folder to store the dashboard (choose a folder that has the right access for your users).

Click Create.

Add Components to the Dashboard:

Click + Component to add a new component.

Choose the report you created earlier from the list of available reports.

Select a Display Type (e.g., bar chart, pie chart, table).

Configure the component by selecting groupings, metrics, and other options as needed.

Click Add to add the component to the dashboard.

Arrange and Customize Components:

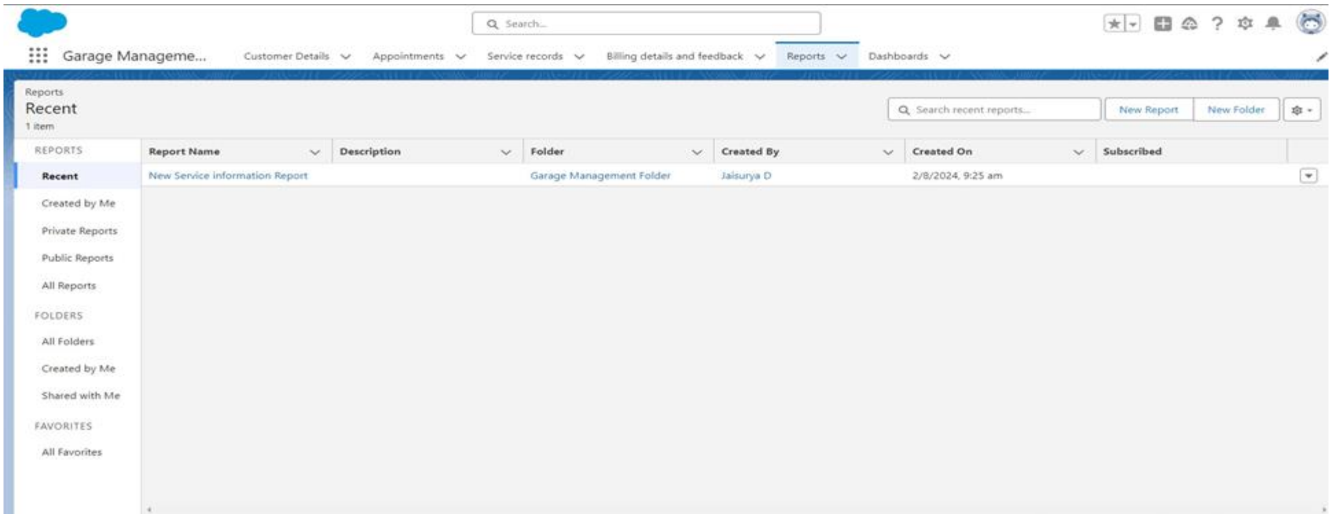
Drag and drop components on the dashboard grid to arrange them.

Adjust the size and properties of each component to optimize the layout.

Save and View the Dashboard:

Once you have added all the components, click Save.

Click Done to view your completed dashboard.



Set Up Workflow Rules and Automation :

1. Navigate to Workflow Rules:

- Go to Setup → Workflow Rules → New Rule.

2. Define Rule Criteria:

- Choose the object and set criteria for triggering the workflow
- Define actions such as email alerts, field updates, or task creation.

3. Activate Workflow Rule:

- Click Save and Activate to enable the rule.

Edit Layout:

- Drag and drop fields and sections to arrange the layout.
- Configure visibility settings and field placements.
- Click Save to apply the layout changes.

Security and Access Control :

1. **Navigate to Profiles:**
   - Go to Setup → Profiles.
   - Edit profiles to set permissions for objects and fields.

2. **Use Permission Sets:**
   - Go to Setup → Permission Sets.
   - Click New Permission Set to create a new set of permissions. - Define the permissions needed (object access, field-level security, etc.).
   - Assign the permission set to users or groups as necessary.
   - Click Save to apply the permissions.

3. **Set Up Role Hierarchy:**
   - Go to Setup → Roles → Role Hierarchy.
   - Define roles that reflect your organization's structure. - Set up roles to control access and data visibility based on user roles.
   - Assign users to roles to manage their access level accordingly.

Conclusion:

Implementing the Garage Management System (GMS) on the Salesforce platform has streamlined operations, enhanced customer service, and improved overall efficiency within our garage business. By leveraging Salesforce's robust features, the GMS effectively manages customer relationships, service schedules, inventory, and billing processes.

Benefits:

- **Increased Operational Efficiency:** Automation of routine tasks and workflows has reduced manual work and errors, freeing up staff to focus on higher-value activities.
- **Enhanced Customer Experience:** By maintaining a comprehensive record of customer interactions and preferences, the GMS has enabled more personalized and responsive service.
- **Scalability:** Built on the Salesforce platform, the GMS is easily scalable to accommodate business growth, new locations, and additional service offerings.
- **Flexibility:** The system is adaptable to evolving business needs, with the ability to integrate additional Salesforce apps or customizations as required.

In conclusion, the Garage Management System in Salesforce has transformed the way our garage operates, leading to significant improvements in efficiency, customer satisfaction, and profitability.