

Garage Management System



Project by
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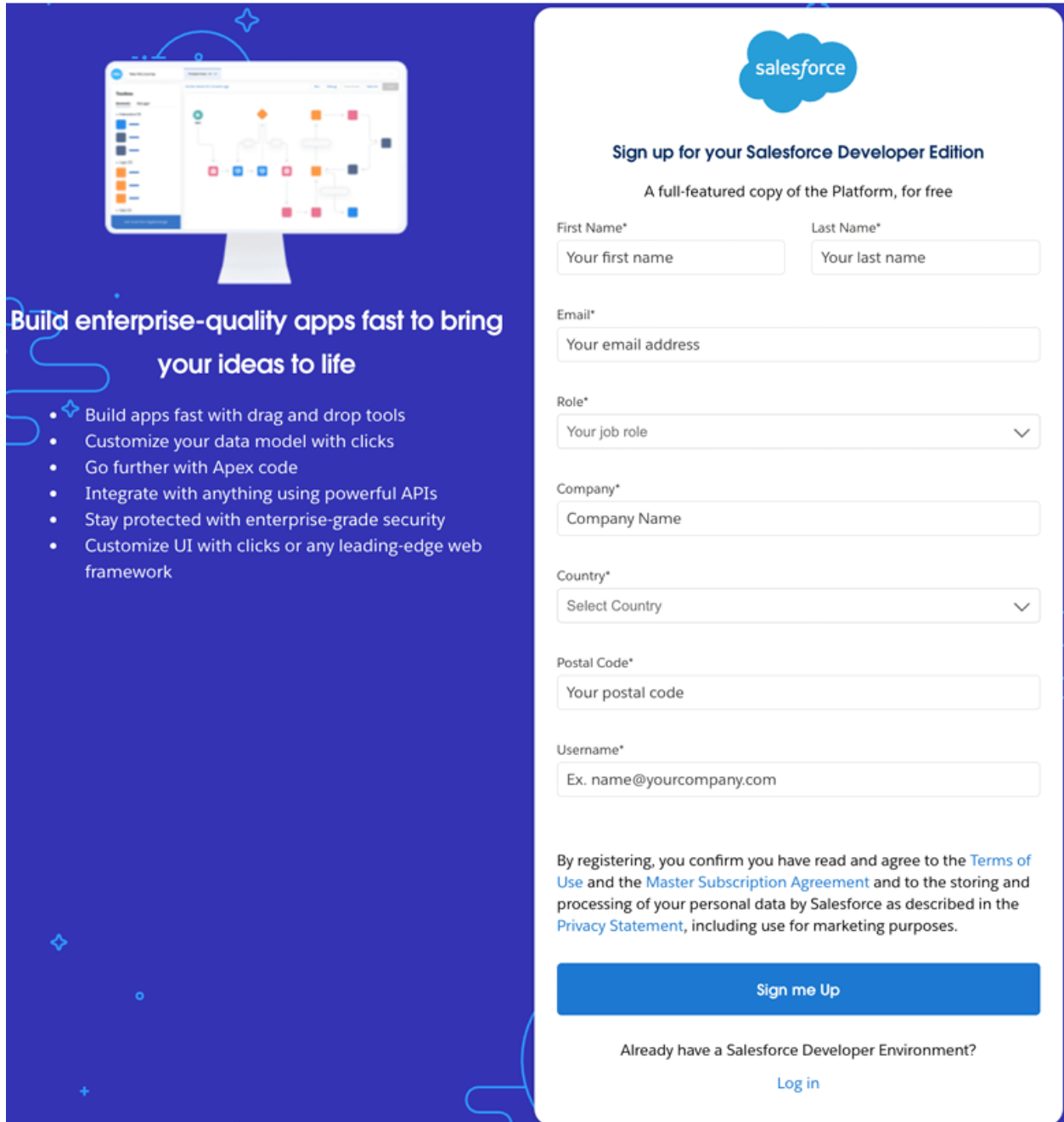
About Garage Management System:

The Garage Management System is a valuable tool for automotive repair facilities, helping them deliver top-notch service, increase operational efficiency, and build lasting customer relationships. With its user-friendly interface and powerful features, GMS empowers garages to thrive in a competitive market while ensuring a seamless and satisfying experience for both customers and staff.

Garage Management System Setup Guide

1. Creating a Salesforce Developer Account:

1. Visit Salesforce Developer Signup



The image shows the Salesforce Developer Edition signup page. On the left, there is a blue sidebar with a white monitor icon displaying a flow diagram. Below the icon, the text reads "Build enterprise-quality apps fast to bring your ideas to life". A bulleted list follows, detailing the capabilities of the platform. On the right, the main content area is white with a blue Salesforce logo at the top. The heading "Sign up for your Salesforce Developer Edition" is followed by the subtext "A full-featured copy of the Platform, for free". The form contains several input fields: "First Name*", "Last Name*", "Email*", "Role*" (a dropdown menu), "Company*", "Country*" (a dropdown menu), "Postal Code*", and "Username*". A blue "Sign me Up" button is positioned below the form. At the bottom, there is a link for "Log in" for users who already have an account.

Build enterprise-quality apps fast to bring your ideas to life

- Build apps fast with drag and drop tools
- Customize your data model with clicks
- Go further with Apex code
- Integrate with anything using powerful APIs
- Stay protected with enterprise-grade security
- Customize UI with clicks or any leading-edge web framework

Sign up for your Salesforce Developer Edition

A full-featured copy of the Platform, for free

First Name*

Last Name*

Email*

Role*

Company*

Country*

Postal Code*

Username*

By registering, you confirm you have read and agree to the [Terms of Use](#) and the [Master Subscription Agreement](#) and to the storing and processing of your personal data by Salesforce as described in the [Privacy Statement](#), including use for marketing purposes.

Sign me Up

Already have a Salesforce Developer Environment?

[Log in](#)

2. Fill out the signup form:

- First Name & Last Name
- Email
- Role: Developer
- Company: College Name
- Country: India
- Postal Code: Your Pin Code
- Username: (e.g., username@organization.com)

2. Account Activation

1. Check your email inbox for a verification email from Salesforce.
2. Click Verify Account.
3. Set up your password and security question, then click Change Password.

3. Creating Salesforce Objects

3.1 Customer Details Object

1. Go to Object Manager > Create > Custom Object.
2. Configure the following:
 - Label Name: Customer Details
 - Plural Label Name: Customer Details
 - Record Name: Customer Name (Text)
3. Enable Allow Reports, Track Field History, and Allow Search.
4. Click Save.

3.2 Appointment Object

1. Go to Object Manager > Create > Custom Object.
2. Configure the following:
 - Label Name: Appointment
 - Plural Label Name: Appointments
 - Record Name: Appointment Name (Auto Number)
 - Display Format: app-{000}, Starting Number: 1
3. Enable Allow Reports, Track Field History, and Allow Search.
4. Click Save.

3.3 Service Records Object

1. Go to Object Manager > Create > Custom Object.
2. Configure the following:
 - Label Name: Service Records
 - Plural Label Name: Service Records
 - Record Name: Service Records Name (Auto Number)
 - Display Format: ser-{000}, Starting Number: 1
3. Enable Allow Reports, Track Field History, and Allow Search.
4. Click Save.

3.4 Billing Details and Feedback Object

1. Go to Object Manager > Create > Custom Object.
2. Configure the following:
 - Label Name: Billing Details and Feedback
 - Plural Label Name: Billing Details and Feedback
 - Record Name: Billing Details and Feedback Name (Auto Number)
 - Display Format: bill-{000}, Starting Number: 1
3. Enable Allow Reports, Track Field History, and Allow Search.
4. Click Save.

4. Creating Custom Tabs

1. Go to Setup > Tabs > New (under Custom Object Tabs).
2. Select the object (e.g., Customer Details), choose a tab style, and click Next.
3. Configure profile visibility as needed and click Next.
4. Click Save.

Repeat for remaining objects (Appointments, Service Records, Billing Details and Feedback)

5. Creating a Lightning App

1. Go to Setup > App Manager > New Lightning App.
2. Configure the app:
 - App Name: Garage Management Application

- . Leave other settings as default and click Next.
- 3. Add navigation items (Customer Details, Appointments, Service Records, Billing Details and Feedback, Reports, Dashboards) and click Next.
- 4. Assign the System Administrator profile to the app and click Save & Finish.

6. Creating Fields for Objects

6.1 Customer Details Object

- 1. Go to Setup > Object Manager > Customer Details > Fields & Relationships > New.
- 2. Create the following fields:
 - . Phone Number (Phone)
 - . Gmail (Email)

6.2 Appointment Object

- 1. Create a Lookup Relationship to Customer Details.
- 2. Create the following fields:
 - . Maintenance Service (Checkbox)
 - . Repairs (Checkbox)
 - . Replacement Parts (Checkbox)
 - . Appointment Date (Date)
 - . Service Amount (Currency)
 - . Vehicle Number Plate (Text)

6.3 Service Records Object

- 1. Create a Lookup Relationship to Appointment.
- 2. Create the following fields:
 - . Quality Check Status (Checkbox)
 - . Service Status (Picklist: Started, Completed)
 - . Service Date (Formula: Created Date)

6.4 Billing Details and Feedback Object

- 1. Create a Lookup Relationship to Service Records.

2. Create the following fields:

- . Payment Paid (Currency)
- . Rating for Service (Text)
- . Payment Status (Picklist: Pending, Completed)

7. Creating Validation Rules

7.1 Appointment Object

- Rule Name: Vehicle
- Formula: NOT(REGEX(Vehicle_number_plate__c, "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))
- Error Message: Please enter a valid number.

7.2 Service Records Object

- Rule Name: service_status_note
- Formula: NOT(ISPICKVAL(Service_Status__c, "Completed"))
- Error Message: Still it is pending.

7.3 Billing Details and Feedback Object

- Rule Name: rating_should_be_less_than_5
- Formula: NOT(REGEX(Rating_for_service__c, "[1-5]{1}"))
- Error Message: Rating should be from 1 to 5.

8. Creating a Flow

8.1 Create Flow for Billing Details and Feedback

1. Go to Setup > Flow > New Flow.
2. Select Record-triggered flow.
3. Configure the flow to trigger when a record is created or updated.
4. Add an Update Records element:
 - . Label: Amount Update
 - . Filter Condition: Payment Status = Completed
 - . Field Values: Set Payment Paid to Service_Amount__c.
5. Add an Email Alert element:

- . Label: Email Alert
 - . Recipient: {!\$Record.Service_records__r.Appointment__r.Customer_Name__r.Gmail__c}
 - . Subject: Thank You for Your Payment - Garage Management
 - . Body: Use a text template to include customer details and payment amount.
6. Save and activate the flow.

9. Apex Code for Amount Distribution

9.1 Create an Apex Handler Class Code:

Code:

```
public class AmountDistributionHandler {
    public static void amountDist(list listApp) {
        for (Appointment__c app : listApp) {
            if (app.Maintenance_service__c && app.Repairs__c && app.Replacement_Parts__c) {
                app.Service_Amount__c = 10000;
            }
            else if (app.Maintenance_service__c && app.Repairs__c) {
                app.Service_Amount__c = 5000;
            }
            else if (app.Maintenance_service__c && app.Replacement_Parts__c) {
                app.Service_Amount__c = 8000;
            }
            else if (app.Repairs__c && app.Replacement_Parts__c) {
                app.Service_Amount__c = 7000;
            }
            else if (app.Maintenance_service__c) {
                app.Service_Amount__c = 2000;
            }
            else if (app.Repairs__c) {
                app.Service_Amount__c = 3000;
            }
            else if (app.Replacement_Parts__c) {
                app.Service_Amount__c = 5000;
            }
        }
    }
}
```

```
}
```

9.2 Create a Trigger for Appointment

Code:

```
trigger AmountDistribution on Appointment__c (before insert, before update) {  
  if (trigger.isBefore && (trigger.isInsert || trigger.isUpdate)) {  
    AmountDistributionHandler.amountDist(trigger.new);  
  }  
}
```

10. Creating Reports

10.1 Create a Report Folder

1. Go to App Launcher > Reports > New Folder.
2. Name the folder Garage Management Folder and click Save.

10.2 Create a Report Type

1. Go to Setup > Report Types > New Custom Report Type.
2. Select Customer Details as the primary object.
3. Add Appointment, Service Records, and Billing Details and Feedback as related objects.

10.3 Create Reports

1. Go to Reports > New Report.
2. Use the custom report type to create and customize your reports.

11. Creating Dashboards

11.1 Create a Dashboard Folder

1. Click on the app launcher and search for dashboard.
2. Click on dashboard tab.

3. Click new folder, give the folder label as " Service Rating dashboard".
4. Folder unique name will be auto populated.
5. Click save.
6. Share the Dashboard Folder with the Role "Manager".

11.2 Create Dashboard

1. Go to the app >> click on the Dashboards tabs.
2. Give a Name and select the folder that created, and click on create.
3. Select add component.
4. Select a Report and click on select.
5. Select the Line Chart. Change the theme.
6. Click Add then click on Save and then click on Done.
7. Preview is shown below.
8. After that Click on Subscribe on top right.
9. Set the Frequency as " weekly " .
10. Set a day as monday.
11. And Click on save.
- 12.The Dashboard is created.

Garage Management System Overview

Customer Details

The Customer Details tab shows the list of Customers and their details.

This screenshot shows the 'Recently Viewed' section of the 'Customer Details' page. It displays a list of 11 customers, each with a checkbox, a name, and a dropdown menu. The list is titled 'Recently Viewed' and includes a search bar and several action buttons (New, Import, Change Owner, Assign Label). The browser address bar shows the URL: `vasireddyvenkatadiinst-4e7-dev-ed.develop.lightning.force.com/lightning/o/Customer_Details_c/list?filterName=_Recent`.

	Customer Name	
1	ravi	
2	mahesh	
3	ammu	
4	jayaram	
5	yashu	
6	niha	
7	surya	
8	teju	
9	geethika	
10	dinesh	
11	soma	

This screenshot shows the 'Details' view for the customer 'soma'. It displays a form with fields for Customer Name, Phone number, Gmail, Owner, Created By, and Last Modified By. The 'Owner' field is populated with 'SOMA DINESH BODDU'. The 'Created By' and 'Last Modified By' fields are also populated with 'SOMA DINESH BODDU' and the date '29/09/2024, 2:35 pm'. The browser address bar shows the URL: `vasireddyvenkatadiinst-4e7-dev-ed.develop.lightning.force.com/lightning/r/Customer_Details_c/a01Qy0000W4YySIAW/view`.

Related	Details
Customer Name	soma
Phone number	9876453621
Gmail	soma@gmail.com
Owner	SOMA DINESH BODDU
Created By	SOMA DINESH BODDU, 29/09/2024, 2:35 pm
Last Modified By	SOMA DINESH BODDU, 29/09/2024, 2:35 pm

Appointments

Shows the list of appointments and the appointment details.

Browser tabs: New Tab, Billing Amount Flow - V1, Billing details and feedback | S..., Recently Viewed | Appointment..., Student - Skill Wallet

Address bar: vasireddyvenkatadriinst-4e7-dev-ed.develop.lightning.force.com/lightning/o/Appointment_c/list?filterName=_Recent

Navigation: Garage Manageme..., Customer Details, Appointments, Service records, Billing details and feedback, Reports, Dashboards

Appointments: Recently Viewed

Buttons: New, Import, Change Owner, Assign Label

Search: Search this list...

	Appointment Name	
1	<input type="checkbox"/> app-010	
2	<input type="checkbox"/> app-009	
3	<input type="checkbox"/> app-008	
4	<input type="checkbox"/> app-007	
5	<input type="checkbox"/> app-006	
6	<input type="checkbox"/> app-005	
7	<input type="checkbox"/> app-004	
8	<input type="checkbox"/> app-002	
9	<input type="checkbox"/> app-003	
10	<input type="checkbox"/> app-001	
11	<input type="checkbox"/> app-011	

Browser tabs: New Tab, Billing Amount Flow - V1, Billing details and feedback | S..., app-010 | Appointment | Sales..., Student - Skill Wallet

Address bar: vasireddyvenkatadriinst-4e7-dev-ed.develop.lightning.force.com/lightning/r/Appointment_c/a02Qy000003LXSHIA4/view

Navigation: Garage Manageme..., Customer Details, Appointments, Service records, Billing details and feedback, Reports, Dashboards

Appointment: app-010

Buttons: New Contact, Edit, New Opportunity

Related Details

Appointment Name	app-010	Owner	SOMA DINESH BODDU
Customer Details	soma		
Appointment Date	13/09/2024		
Maintenance service	<input checked="" type="checkbox"/>		
Repairs	<input checked="" type="checkbox"/>		
Replacement Parts	<input checked="" type="checkbox"/>		
Service Amount	₹10,000		
Vehicle number plate	AP00BJ0010		
Created By	SOMA DINESH BODDU , 29/09/2024, 2:46 pm	Last Modified By	SOMA DINESH BODDU , 29/09/2024, 3:34 pm

Service Records

Shows the details of every Service record of the customer.

Service records

Recently Viewed

11 items • Updated a few seconds ago

Search this list...

	Service records Name	
1	ser-011	
2	ser-010	
3	ser-009	
4	ser-008	
5	ser-007	
6	ser-006	
7	ser-005	
8	ser-004	
9	ser-003	
10	ser-002	
11	ser-001	

Service records

ser-001

New Contact Edit New Opportunity

Related Details

Service records Name
ser-001

Appointment
app-011

Quality Check Status
☒

Service Status
Completed

Completed
service date

service date
29/09/2024

Created By
SOMA DINESH BODDU, 29/09/2024, 3:31 pm

Last Modified By
SOMA DINESH BODDU, 29/09/2024, 3:31 pm

Billing Details and Feedback

Contains the overall summary of service, amount paid by the customer, payment status and Rating for the service.

The top screenshot displays a Salesforce page titled 'Billing details and feedback' with a 'Recently Viewed' filter. It shows a list of 12 items, each with a checkbox and a dropdown menu. The items are labeled 'bill-014' through 'bill-001'.

The bottom screenshot shows the detailed view for item 'bill-014'. It includes a 'Details' section with related records such as 'Service records', 'Payment Paid', 'Rating for service', and 'Payment Status'. The 'Activity' section on the right shows a list of activities, including 'Upcoming & Overdue'.

Reports

Reports give you access to your Salesforce data. You can examine your Salesforce data in almost infinite combinations, display it in easy-to-understand formats, and share the resulting insights with others. Before building, reading, and sharing reports, review these

reporting basics.

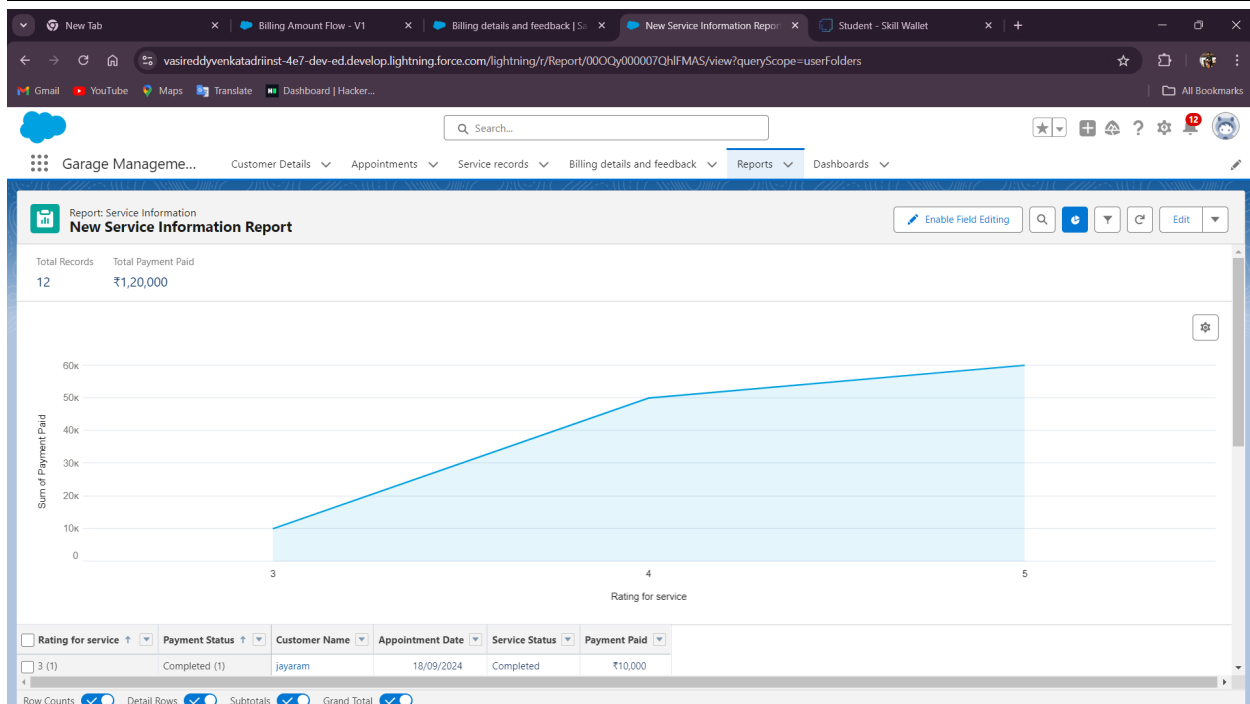
Types of Reports in Salesforce

1. Tabular
2. Summary
3. Matrix
4. Joined Rep

The screenshot shows the Salesforce Reports page. The browser address bar displays the URL: `vasireddyvenkatadriinst-4e7-dev-ed.develop.lightning.force.com/lightning/o/Report/home?queryScope=mr`. The page header includes the Salesforce logo, a search bar, and navigation tabs: Garage Manage..., Customer Details, Appointments, Service records, Billing details and feedback, Reports (selected), and Dashboards. The main content area is titled 'Reports' and 'Recent' with a search bar and buttons for 'New Report' and 'New Folder'. A table lists recent reports:

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	New Service Information Report		Garage Management Folder	SOMA DINESH BODDU	29/9/2024, 3:50 pm	

On the left sidebar, there are sections for 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'FOLDERS' (All Folders, Created by Me, Shared with Me), and 'FAVORITES' (All Favorites).



vasireddyvenkatadriinst-4e7-dev-ed.develop.lightning.force.com/lightning/r/Report/000Qy000007QhIFMAS/view?queryScope=userFolders

Search...

Garage Manage... Customer Details Appointments Service records Billing details and feedback Reports Dashboards

Report: Service Information
New Service Information Report

Enable Field Editing

Rating for service	Payment Status	Customer Name	Appointment Date	Service Status	Payment Paid
3 (1)	Completed (1)	jayaram	18/09/2024	Completed	₹10,000
	Subtotal				₹10,000
	Subtotal				₹10,000
4 (5)	Pending (1)	surya	20/09/2024	Completed	₹10,000
	Subtotal				₹10,000
	Completed (4)	maresh	10/09/2024	Completed	₹10,000
		niha	16/09/2024	Completed	₹10,000
		geethika	13/09/2024	Completed	₹10,000
		soma	13/09/2024	Completed	₹10,000
	Subtotal				₹40,000
	Subtotal				₹50,000
5 (6)	Pending (2)	ammu	12/09/2024	Completed	₹10,000
		yashu	17/09/2024	Completed	₹10,000
	Subtotal				₹20,000
	Completed (4)	jayaram	18/09/2024	Completed	₹10,000
		dinesh	21/09/2024	Completed	₹10,000

Row Counts: ☒ Detail Rows: ☒ Subtotals: ☒ Grand Total: ☒

vasireddyvenkatadriinst-4e7-dev-ed.develop.lightning.force.com/lightning/r/Report/000Qy000007QhIFMAS/view?queryScope=userFolders

Search...

Garage Manage... Customer Details Appointments Service records Billing details and feedback Reports Dashboards

Report: Service Information
New Service Information Report

Enable Field Editing

Rating for service	Payment Status	Customer Name	Appointment Date	Service Status	Payment Paid
	Completed (4)	maresh	10/09/2024	Completed	₹10,000
		niha	16/09/2024	Completed	₹10,000
		geethika	13/09/2024	Completed	₹10,000
		soma	13/09/2024	Completed	₹10,000
	Subtotal				₹40,000
	Subtotal				₹50,000
5 (6)	Pending (2)	ammu	12/09/2024	Completed	₹10,000
		yashu	17/09/2024	Completed	₹10,000
	Subtotal				₹20,000
	Completed (4)	jayaram	18/09/2024	Completed	₹10,000
		dinesh	21/09/2024	Completed	₹10,000
		teju	21/09/2024	Completed	₹10,000
		ravi	14/09/2024	Completed	₹10,000
	Subtotal				₹40,000
	Subtotal				₹60,000
	Total (12)				₹1,20,000

Row Counts: ☒ Detail Rows: ☒ Subtotals: ☒ Grand Total: ☒

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. Use

dashboards to help users identify trends, sort out quantities, and measure the impact of their activities. Before building, reading, and sharing dashboards, review these dashboard basics.

New Tab x Billing Amount Flow - V1 x Billing details and feedback | S... x Dashboards | Salesforce x Student - Skill Wallet x +

vasireddyvenkatadriinst-4e7-dev-ed.develop.lightning.force.com/lightning/o/Dashboard/home?queryScope=mru

Gmail YouTube Maps Translate Dashboard | Hacker...

Search...

Star Plus Cloud ? Settings 12 Profile

Garage Manage... Customer Details ▾ Appointments ▾ Service records ▾ Billing details and feedback ▾ Reports ▾ Dashboards ▾

Dashboards

Recent

1 item

Search recent dashboards... New Dashboard New Folder ⚙

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Customer Review	Service Rating dashboard	SOMA DINESH BODDU	29/9/2024, 3:55 pm	✓	

Created by Me

Private Dashboards

All Dashboards

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

New Tab x Billing Amount Flow - V1 x Billing details and feedback | S... x Customer Review | Salesforce x Student - Skill Wallet x +

vasireddyvenkatadriinst-4e7-dev-ed.develop.lightning.force.com/lightning/r/Dashboard/01ZQy0000019cVIMAY/view?queryScope=userFolders

Gmail YouTube Maps Translate Dashboard | Hacker...

Search...

Star Plus Cloud ? Settings 12 Profile

Garage Manage... Customer Details ▾ Appointments ▾ Service records ▾ Billing details and feedback ▾ Reports ▾ Dashboards ▾

Dashboard

Customer Review

Refresh Edit Subscribe ▾

As of 29-Sept-2024, 4:03 pm Viewing as SOMA DINESH BODDU

New Service Information Report

Sum of Payment Paid

Rating for service

Payment Status

Pending

Completed

View Report (New Service Information Report)

