



GARAGE MANAGEMENT SYSTEM

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1. Introduction

1.1 Project Overview

The Garage Management System (GMS) is a comprehensive, cloud-based enterprise solution developed on the Salesforce Lightning Platform, designed to revolutionize the operational capabilities of modern automotive repair and service centers. This system addresses critical industry challenges by integrating disparate functions—including customer relationship management (CRM), appointment scheduling, service tracking, billing, and performance analytics—into a single, unified, and scalable ecosystem. By replacing inefficient, paper-based processes and disconnected software tools, the GMS eliminates data silos, reduces administrative overhead, and minimizes errors, thereby streamlining the entire workflow from customer intake to service completion and payment.

1.2 Objectives

The primary objectives of this project are to:

- Provide a centralized database for all customer and vehicle information.
- Simplify the process of scheduling and managing appointments to avoid overlaps and optimize resource allocation.



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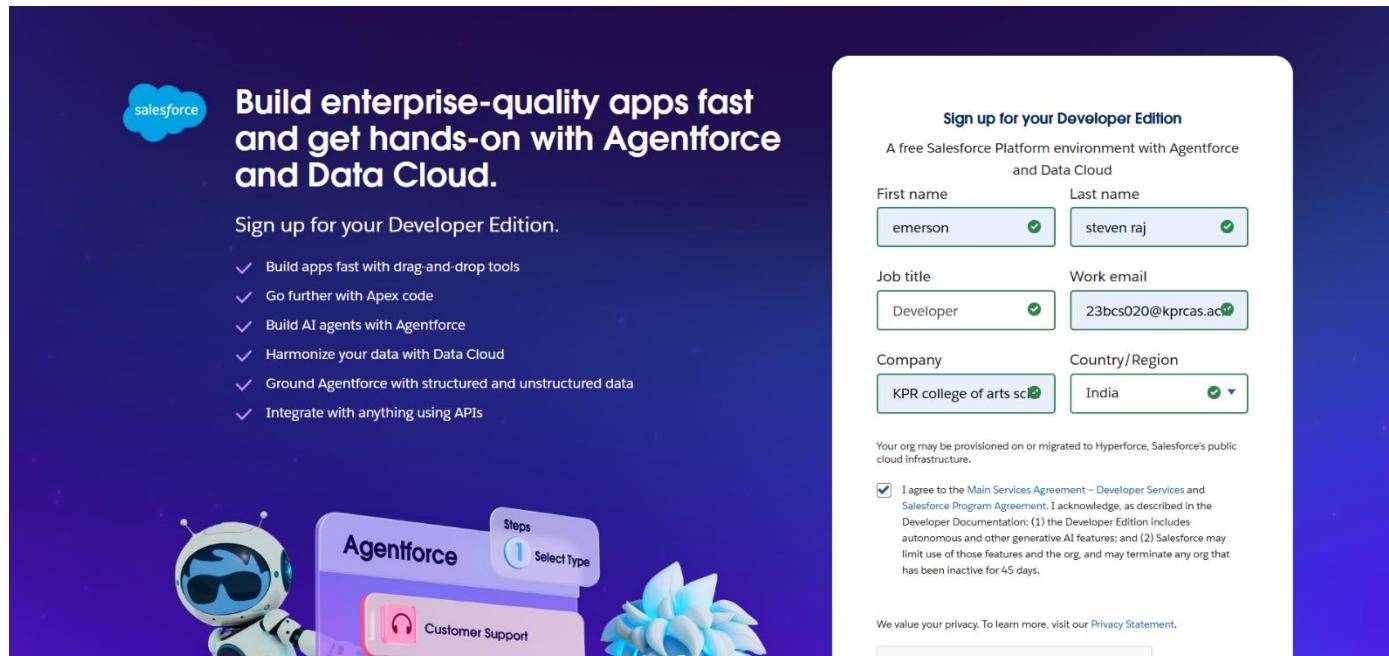
PARTNER

- Maintain a detailed and accessible history of all services performed on each vehicle.
- Automate and streamline the billing and invoicing process.
- Capture customer feedback to monitor service quality and satisfaction.
- Provide management with real-time insights into business performance through visual dashboards and detailed reports.

3.1 Salesforce Developer Account Setup

Creating a Developer Account :

By using this URL - <https://www.salesforce.com/form/developer-signup/?d=pb>



3.2 Custom Object Creation

Custom objects are the core data tables of the application. The following objects were created:

- Customer details
- Appointments



- Service Records
- Billing and Feedback



❖ Customer Details:

The screenshot shows the Salesforce Setup interface for the Object Manager. The left sidebar lists various configuration options like Fields & Relationships, Page Layouts, and Buttons, Links, and Actions. The main area displays the 'Customer Details' object configuration. The 'Details' tab is selected, showing fields such as API Name (Customer_Details__c), Singular Label (Customer Details), and Plural Label (Customer Details). On the right, there are checkboxes for enabling Reports, Activities, Field History, and Deployment Status, all of which are checked. Deployment Status is set to 'Deployed'. A help link to the Standard salesforce.com Help Window is also present.

❖ Appointment:



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PARTNER

Setup Home Object Manager

Object Manager

SETUP > OBJECT MANAGER

Appointment

Details	
Description	
API Name	Appointment_c
Custom	✓
Singular Label	Appointment
Plural Label	Appointments
Enable Reports	
✓	
Track Activities	
Track Field History	
✓	
Deployment Status	
Deployed	
Help Settings	
Standard salesforce.com Help Window	

Edit Delete

❖ Service Records:

Setup Home Object Manager

Object Manager

SETUP > OBJECT MANAGER

Service records

Details	
Description	
API Name	Service_records_c
Custom	✓
Singular Label	Service records
Plural Label	Service records
Enable Reports	
✓	
Track Activities	
Track Field History	
✓	
Deployment Status	
Deployed	
Help Settings	
Standard salesforce.com Help Window	

Edit Delete

❖ Billing and Feedback:

3.3 Custom Tab Creation

A custom tab was created for each major object to allow users to easily view and create records.

- Tabs created for: Customer Details, Appointment, Service Records, Billing and Feedback.
- Each tab was configured with appropriate styles and icons for easy identification.



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garage management system | orgfarm-0e1430e877-dev-ed | Recently Viewed | Customer Dev | Tabs | Salesforce

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Setup Home Object Manager

Quick Find

Custom Object Tab Appointments

Custom Tab Definition Detail

	Tab Label	Object	Tab Style
Edit	Appointments	Appointment	Computer
	Description	Splash Page Custom Link	
	Created By	MANJULA DEVI 8/27/2025, 11:39 PM	
	Modified By	MANJULA DEVI 8/27/2025, 11:39 PM	

Help for this Page

Setup Home

Salesforce Go

Service Setup Assistant

Commerce Setup Assistant

Field Service Setup Home (Beta)

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Sales Cloud Everywhere

ADMINISTRATION

> Users

> Data

> Email

PLATFORM TOOLS

> Subscription Management



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Setup Home Object Manager

Quick Find

Custom Object Tab Billing details and feedback

Custom Tab Definition Detail

	Tab Label	Object	Tab Style
Edit	Billing details and feedback	Billing details and feedback	Chip
	Description	Splash Page Custom Link	
	Created By	MANJULA DEVI 8/27/2025, 11:40 PM	
	Modified By	MANJULA DEVI 8/27/2025, 11:40 PM	

Help for this Page

Setup Home

Salesforce Go

Service Setup Assistant

Commerce Setup Assistant

Field Service Setup Home (Beta)

Hyperforce Assistant

Release Updates

Salesforce Mobile App

Lightning Usage

Optimizer

Sales Cloud Everywhere

ADMINISTRATION

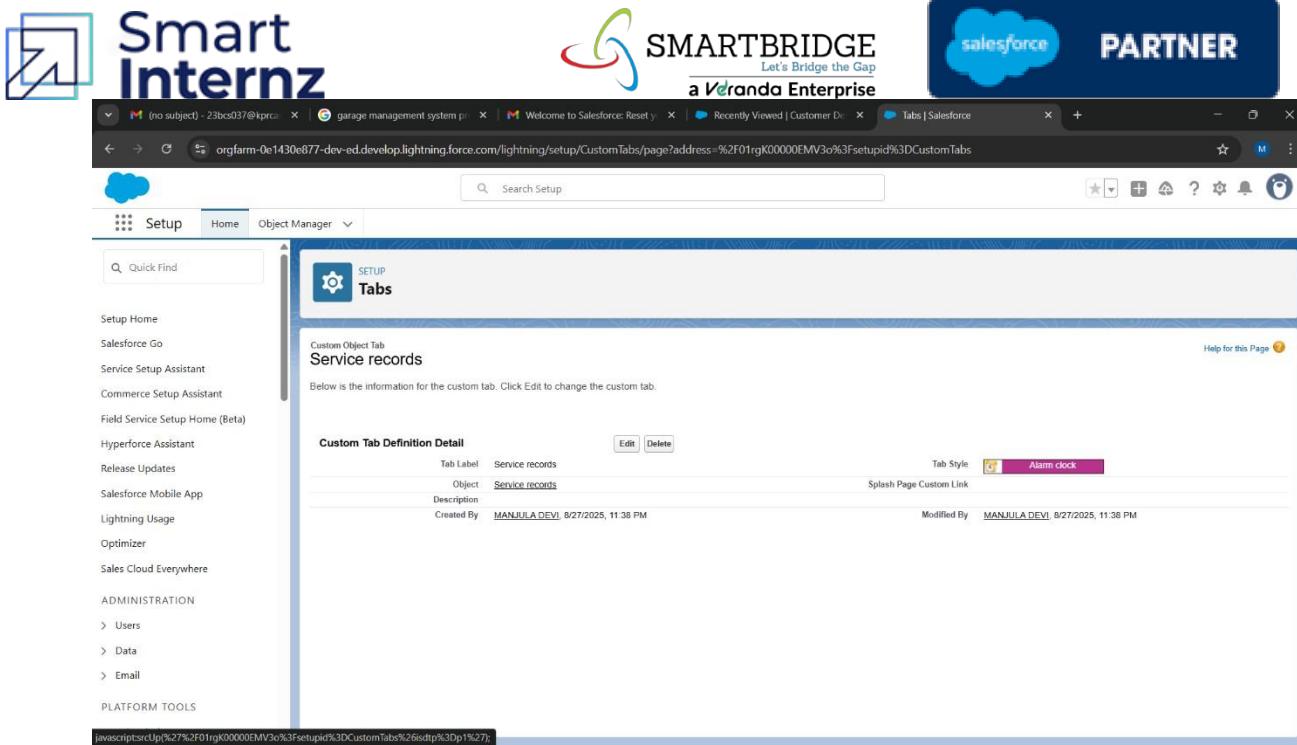
> Users

> Data

> Email

PLATFORM TOOLS

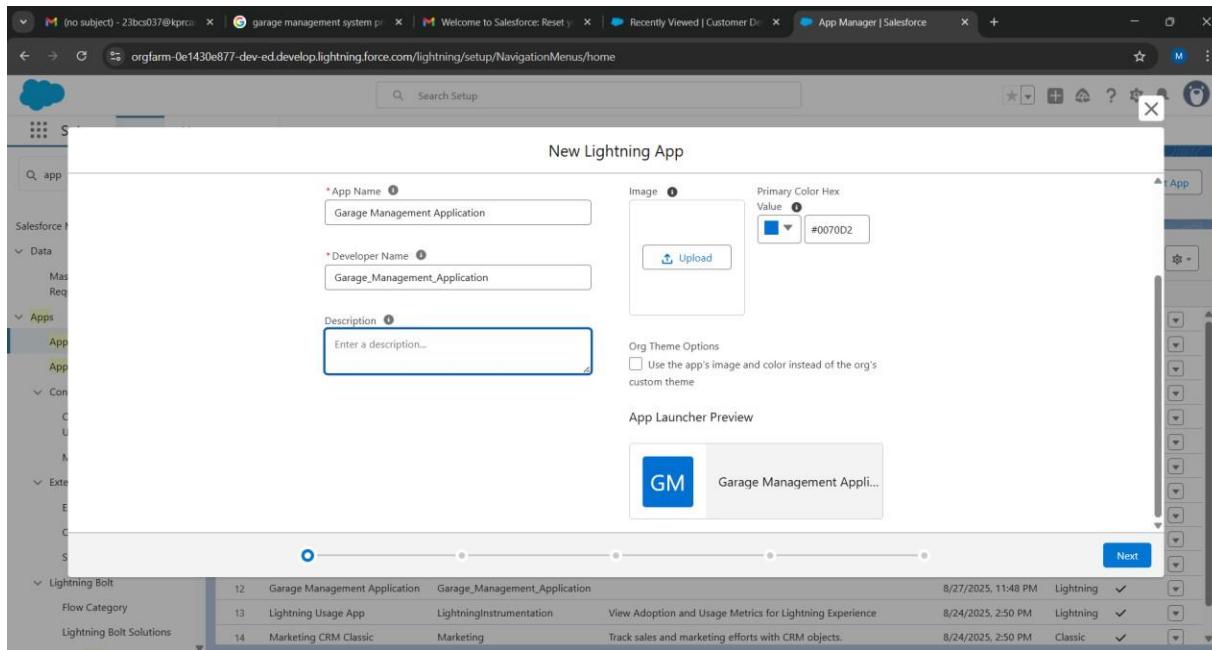
> Subscription Management



3.4 Lightning Application Builder

A custom Lightning App named "**Garage Management System Application**" was assembled.

Developed Lightning App with relevant tabs



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New Lightning App

Search Setup

Customer Details
Appointments
Service records
Billing details and feedback
Reports
Dashboards

Accounts
Activation Targets
Activations
All Sites
Alternative Payment Methods
Analytics
App Launcher
Appointment Categories
Appointment Invitations
Approval Requests

Back Next

12 Garage Management Application Garage_Management_Application 8/27/2025, 11:48 PM Lightning ✓
13 Lightning Usage App LightningInstrumentation View Adoption and Usage Metrics for Lightning Experience 8/24/2025, 2:50 PM Lightning ✓
14 Marketing CRM Classic Marketing Track sales and marketing efforts with CRM objects. 8/24/2025, 2:50 PM Classic ✓

Lightning Bolt Solutions

This screenshot shows the 'New Lightning App' configuration page. On the left, a sidebar lists various Salesforce categories like Data, Apps, and External Integrations. The main area is titled 'New Lightning App' and contains two columns: 'Available Profiles' and 'Selected Profiles'. Under 'Available Profiles', there are several user profile names listed. Under 'Selected Profiles', only 'System Administrator' is checked. At the bottom, a progress bar indicates the step is 1 of 6. A table at the bottom shows three existing apps: 'Garage Management Application', 'Lightning Usage App', and 'Marketing CRM Classic', along with their respective details and status.

User Profiles

Choose the user profiles that can access this app.

Available Profiles
Selected Profiles

System Administrator

Save & Finish

Back

12 Garage Management Application Garage_Management_Application 8/27/2025, 11:48 PM Lightning ✓
13 Lightning Usage App LightningInstrumentation View Adoption and Usage Metrics for Lightning Experience 8/24/2025, 2:50 PM Lightning ✓
14 Marketing CRM Classic Marketing Track sales and marketing efforts with CRM objects. 8/24/2025, 2:50 PM Classic ✓

Lightning Bolt Solutions

This screenshot shows the 'User Profiles' configuration step within the 'New Lightning App' setup. It displays a list of available user profiles on the left and a 'Selected Profiles' list on the right, which currently contains 'System Administrator'. A 'Save & Finish' button is visible at the bottom right. The bottom section of the screen shows the same table of existing apps as the previous screenshot.



3.5 Field Creation for Objects

Various field types were added to objects to capture specific data:

- **Customer Details Object:**

The screenshot shows the Salesforce Setup interface for the 'Customer Details' object. On the left, a sidebar lists various setup options like Page Layouts, Lightning Record Pages, and Buttons. The main area is titled 'Fields & Relationships' and displays six items. The table columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data is as follows:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
Customer Name	Name	Text(80)		✓
Gmail	Gmail__c	Email		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
Phone number	Phone_number__c	Phone		

- **Appointment Object:**

The screenshot shows the Salesforce Setup interface for the 'Appointment' object. On the left, a sidebar lists various setup options. The main area is titled 'Fields & Relationships' and displays eleven items. The table columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data is as follows:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment Date	Appointment_Date__c	Date		
Appointment Name	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Customer Details	Customer_Details__c	Lookup(Customer Details)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Maintenance service	Maintenance_service__c	Checkbox		
Owner	OwnerId	Lookup(User/Group)		✓
Repairs	Repairs__c	Checkbox		
Replacement Parts	Replacement_Parts__c	Checkbox		
Service Amount	Service_Amount__c	Currency(19,0)		



- Service Records Object:

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. Under 'Service records', the 'Fields & Relationships' tab is active. The table lists the following fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment	Appointment_c	Lookup(Appointment)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Quality Check Status	Quality_Check_Status_c	Checkbox		
service date	service_date_c	Formula (Date)		
Service records Name	Name	Auto Number		✓
Service Status	Service_Status_c	Picklist		

- Billing and Feedback Object:

The screenshot shows the Salesforce Setup interface with the 'Object Manager' selected. Under 'Billing details and feedback', the 'Fields & Relationships' tab is active. The table lists the following fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Billing details and feedback Name	Name	Auto Number		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Payment Paid	Payment_Paid_c	Currency(18, 0)		
Payment Status	Payment_Status_c	Picklist		
Rating for service	Rating_for_service_c	Text(1)		
Service records	Service_records_c	Lookup(Service records)		✓



3.6 Validation Rules

Rules were implemented to ensure data quality:

- **Appointment Object (Invalid Vehicle Plate):**

The screenshot shows the Salesforce Setup interface for the 'Appointment' object. On the left, a sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, etc. The main panel displays the 'Appointment Validation Rule'. The rule details are as follows:

Validation Rule Detail	
Rule Name	Vehicle
Error Condition Formula	NOT(REGEX(Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))
Error Message	Please enter valid number
Description	
Created By	MANJULA DEVI 8/29/2025, 12:45 AM
Modified By	MANJULA DEVI 8/29/2025, 12:45 AM

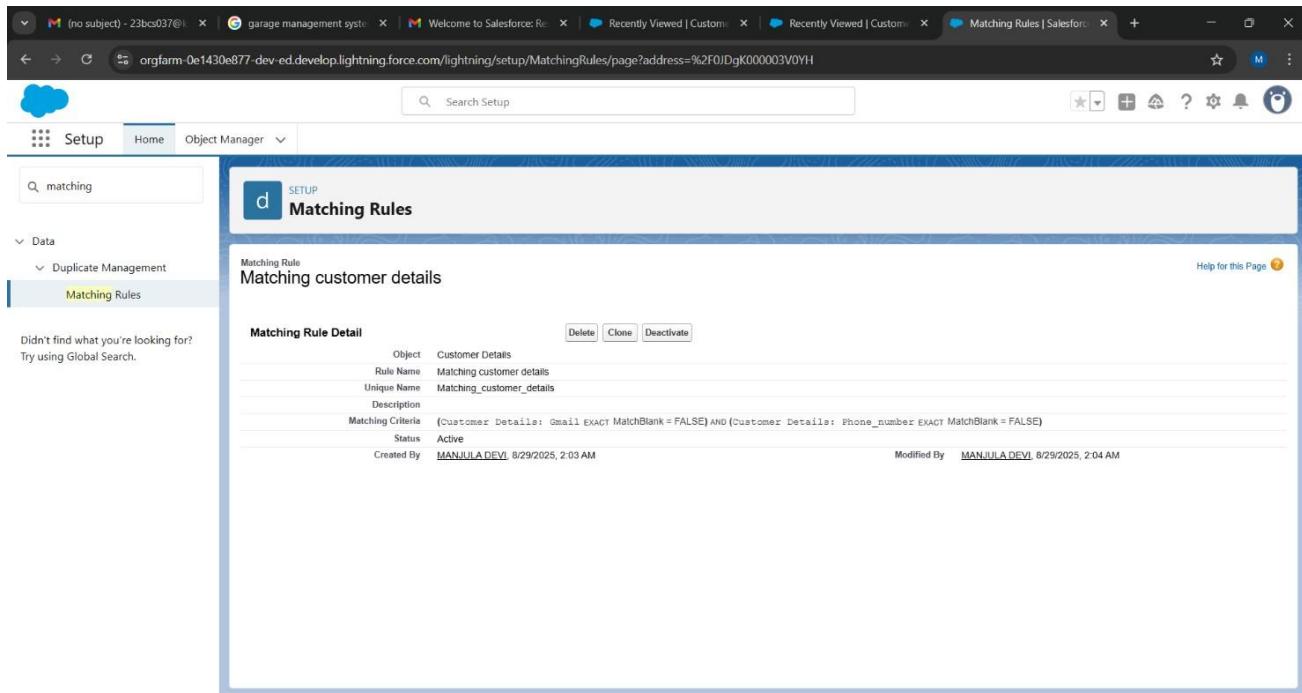
- **Billing and Feedback Object (Invalid Rating):**

The screenshot shows the Salesforce Setup interface for the 'Billing details and feedback' object. On the left, a sidebar lists various configuration options. The main panel displays the 'Billing details and feedback Validation Rule'. The rule details are as follows:

Validation Rule Detail	
Rule Name	rating_should_be_less_than_5
Error Condition Formula	NOT(REGEX(Rating_for_service__c , "[1-5]{1}"))
Error Message	rating should be from 1 to 5
Description	
Created By	MANJULA DEVI 8/29/2025, 12:49 AM
Modified By	MANJULA DEVI 8/29/2025, 12:49 AM

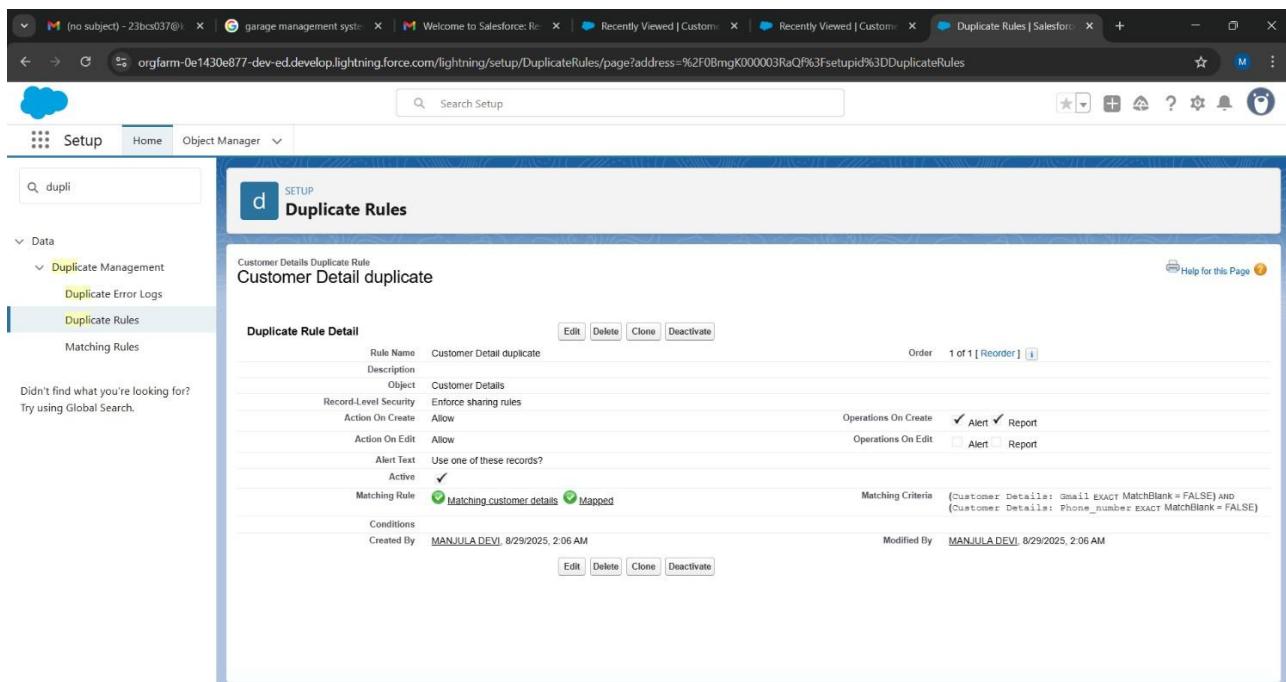
3.7 Duplicate Management Rules

A matching rule was created to identify duplicate Customer Details records based on exact matches of Customer Name and Email. A duplicate rule was then activated to block users from creating these duplicates, prompting them to review the existing record instead.



The screenshot shows the Salesforce Setup interface under the Matching Rules section. A matching rule named "Matching customer details" is displayed. The rule details are as follows:

Matching Rule Detail	Object	Customer Details
Rule Name	Matching customer details	
Unique Name	Matching_customer_details	
Description		
Matching Criteria	(Customer Details: Gmail EXACT MatchBlank = FALSE) AND (Customer Details: Phone_number EXACT MatchBlank = FALSE)	
Status	Active	
Created By	MANJULA DEVI 8/29/2025, 2:03 AM	
Modified By	MANJULA DEVI 8/29/2025, 2:04 AM	



The screenshot shows the Salesforce Setup interface under the Duplicate Rules section. A duplicate rule named "Customer Detail duplicate" is displayed. The rule details are as follows:

Duplicate Rule Detail	Role Name	Customer Detail duplicate
Description		
Object	Customer Details	
Record-Level Security	Enforce sharing rules	
Action On Create	Allow	Operations On Create <input checked="" type="checkbox"/> Alert <input checked="" type="checkbox"/> Report
Action On Edit	Allow	Operations On Edit <input type="checkbox"/> Alert <input type="checkbox"/> Report
Alert Text	Use one of these records?	
Active	<input checked="" type="checkbox"/>	
Matching Rule	<input checked="" type="checkbox"/> Matching_customer_details <input checked="" type="checkbox"/> Mapped	Matching Criteria (Customer Details: Gmail EXACT MatchBlank = FALSE) AND (Customer Details: Phone_number EXACT MatchBlank = FALSE)
Conditions		
Created By	MANJULA DEVI 8/29/2025, 2:06 AM	
Modified By	MANJULA DEVI 8/29/2025, 2:06 AM	



3.8 User Management: Profiles, Roles, and Hierarchy

- **Profiles:** Two key profiles were configured.
- **Manager Profile:** Granted full Read, Create, Edit, Delete, View All, and Modify All permissions on all custom objects.

The screenshot shows the Salesforce Setup interface under the Profiles section. The Manager profile is selected. The Profile Detail table includes fields for Name (Manager), User License (Salesforce), Description, Created By (MANJULA DEVI), Modified By (MANJULA DEVI), and a Custom Profile checkbox which is checked. The Page Layouts section lists various object layouts with their global and specific assignments across different record types like Global, Email Application, Home Page Layout, Account, Alternative Payment Method, and Lead. For example, the Global layout for Home Page Layout is assigned to 'View Assignment'.

- **Salesperson Profile:** Granted Read, Create, and Edit permissions on Service Records but only Read access on other objects like Customer Details and Billing and Feedback.

The screenshot shows the Salesforce Setup interface under the Profiles section. The sales person profile is selected. The Profile Detail table includes fields for Name (sales person), User License (Salesforce Platform), Description, Created By (MANJULA DEVI), Modified By (MANJULA DEVI), and a Custom Profile checkbox which is checked. The Page Layouts section lists various object layouts with their global and specific assignments. For example, the Global layout for Home Page Layout is assigned to 'View Assignment'.



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garage management system | Welcome to Salesforce | Recently Viewed | Custom... | Recently Viewed | Custom... | Roles | Salesforce

orgfarm-0e1430e877-dev-ed.develop.lightning.force.com/lightning/setup/Roles/page?address=%2F00E%2Fe%3Fparent%3D00EgK000003aPh%26setupid%3DRoles%26retURL%3D%252Fu%252Fsetup...

Setup Home Object Manager

Search Setup

Role Edit New Role

Role Edit

Label	Manager
Role Name	Manager
This role reports to	CEO
Role Name as displayed on reports	

Save Save & New Cancel

Help for this Page

Users Roles Feature Settings Sales Contact Roles on Contracts Contact Roles on Opportunities Service Case Teams Case Team Roles Contact Roles on Cases

Didn't find what you're looking for?
Try using Global Search.



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garage management system | Welcome to Salesforce | Recently Viewed | Custom... | Recently Viewed | Custom... | Roles | Salesforce

orgfarm-0e1430e877-dev-ed.develop.lightning.force.com/lightning/setup/Roles/page?address=%2F00E%2Fe%3Fparent%3D00EgK000003BqP%26setupid%3DRoles%26retURL%3D%252Fu%252Fsetup...

Setup Home Object Manager

Search Setup

Role Edit New Role

Role Edit

Label	sales person
Role Name	sales_person
This role reports to	Manager
Role Name as displayed on reports	

Save Save & New Cancel

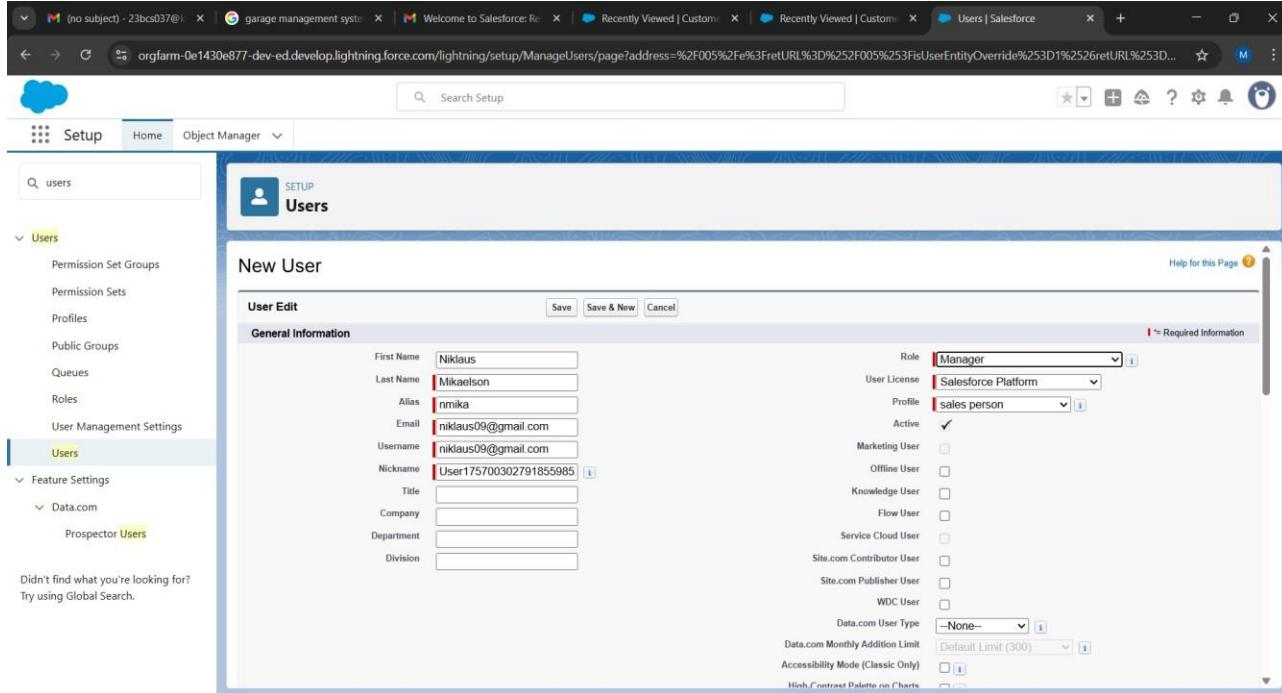
Help for this Page

Users Roles Feature Settings Sales Contact Roles on Contracts Contact Roles on Opportunities Service Case Teams Case Team Roles Contact Roles on Cases

Didn't find what you're looking for?
Try using Global Search.

- **Role Hierarchy:** A hierarchy was established to control record visibility.

CEO (Top Level)-> Manager-> -> Salesperson



Search Setup

Setup Home Object Manager

Q users

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users**
- Feature Settings
- Data.com
- Prospector **Users**

Didn't find what you're looking for?
Try using Global Search.

New User

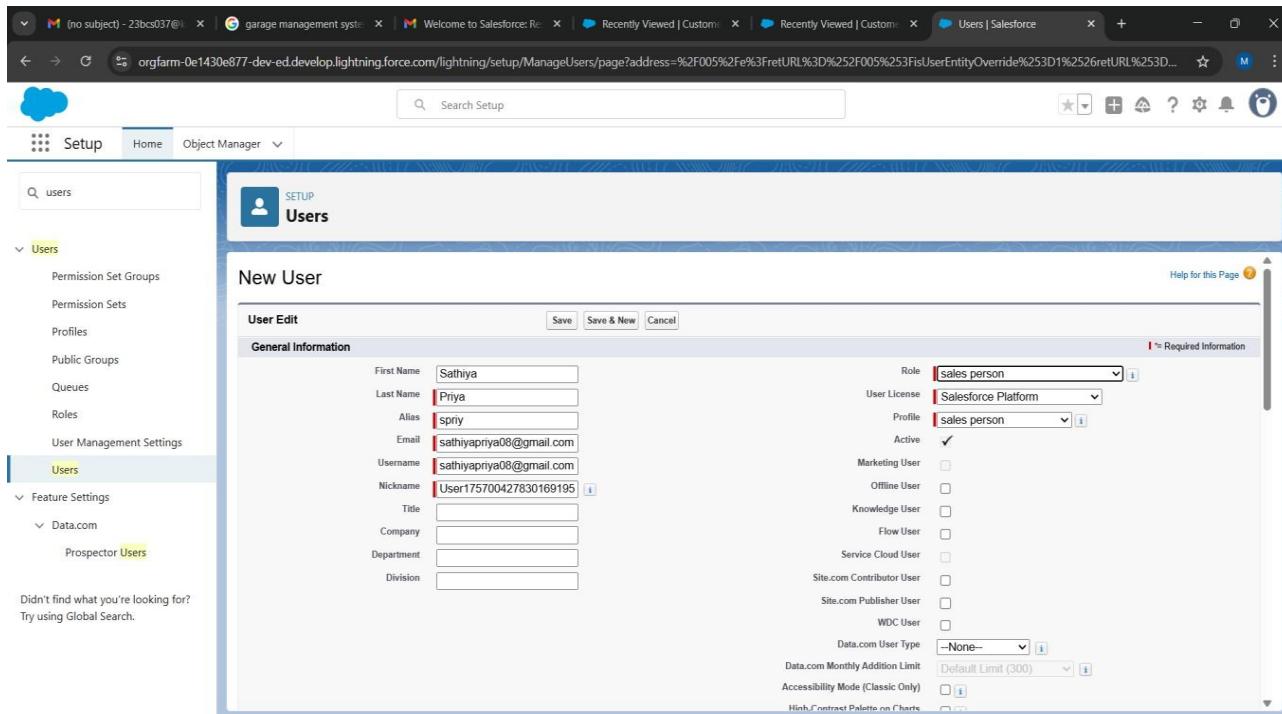
User Edit Save Save & New Cancel

General Information

First Name	Niklaus	Role	Manager
Last Name	Mikaelson	User License	Salesforce Platform
Alias	nmika	Profile	Sales person
Email	niklaus09@gmail.com	Active	<input checked="" type="checkbox"/>
Username	niklaus09@gmail.com	Marketing User	<input type="checkbox"/>
Nickname	User175700302791855985	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>

Data.com User Type: None
Data.com Monthly Addition Limit: Default Limit (300)
Accessibility Mode (Classic Only):

Help for this Page



Search Setup

Setup Home Object Manager

Q users

Users

- Permission Set Groups
- Permission Sets
- Profiles
- Public Groups
- Queues
- Roles
- User Management Settings
- Users**
- Feature Settings
- Data.com
- Prospector **Users**

Didn't find what you're looking for?
Try using Global Search.

New User

User Edit Save Save & New Cancel

General Information

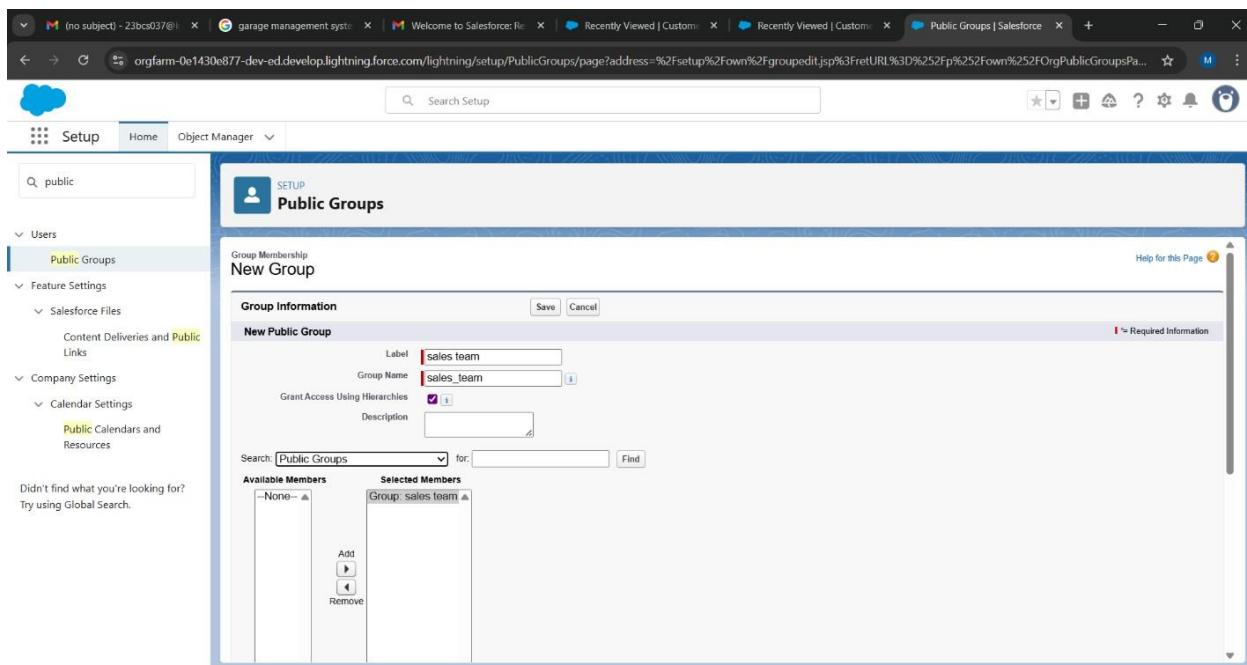
First Name	Sathiya	Role	Sales person
Last Name	Priya	User License	Salesforce Platform
Alias	spriy	Profile	Sales person
Email	sathiyapriya08@gmail.com	Active	<input checked="" type="checkbox"/>
Username	sathiyapriya08@gmail.com	Marketing User	<input type="checkbox"/>
Nickname	User175700427830169195	Offline User	<input type="checkbox"/>
Title		Knowledge User	<input type="checkbox"/>
Company		Flow User	<input type="checkbox"/>
Department		Service Cloud User	<input type="checkbox"/>
Division		Site.com Contributor User	<input type="checkbox"/>

Data.com User Type: None
Data.com Monthly Addition Limit: Default Limit (300)
Accessibility Mode (Classic Only):

Help for this Page

3.10 Public Groups and Organization-Wide Defaults

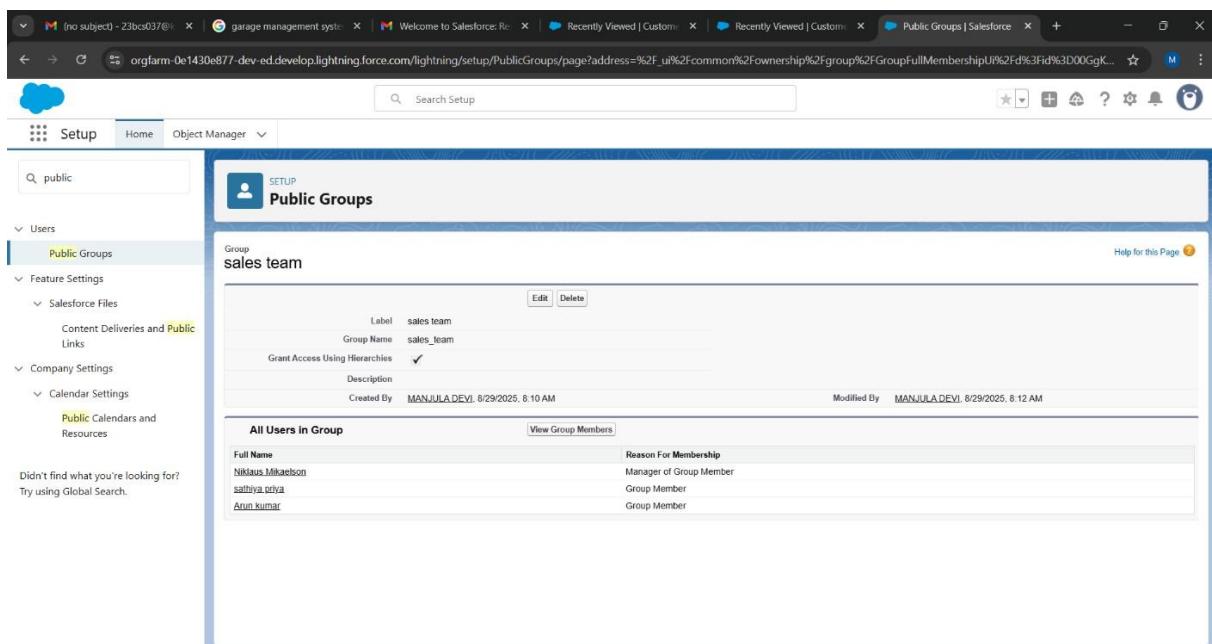
- A **Public Group** named "Sales Team" was created, and all user accounts with the Salesperson profile were added as members.



The screenshot shows the Salesforce Setup interface under the 'Users' section, specifically the 'Public Groups' page. A new group is being created with the following details:

- Label:** sales team
- Group Name:** sales_team
- Grant Access Using Hierarchies:** checked
- Description:** (empty)

The 'Available Members' list is empty, while the 'Selected Members' list contains a single entry: 'Group: sales team'. The 'Add' and 'Remove' buttons are visible between the two lists.



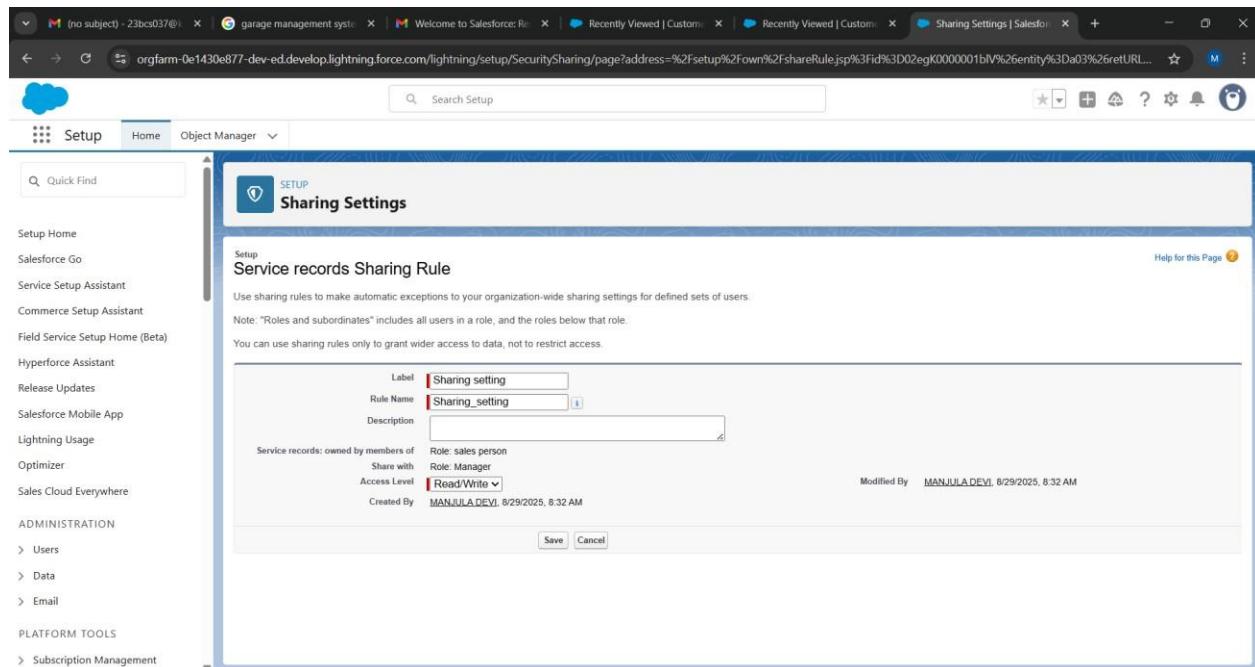
The screenshot shows the details of the newly created Public Group 'sales team' in the Salesforce Setup interface. The group information is as follows:

- Label:** sales team
- Group Name:** sales_team
- Grant Access Using Hierarchies:** checked
- Description:** (empty)
- Created By:** MANJULA DEVI 8/29/2025, 8:10 AM
- Modified By:** MANJULA DEVI 8/29/2025, 8:12 AM

The 'All Users In Group' section lists three users:

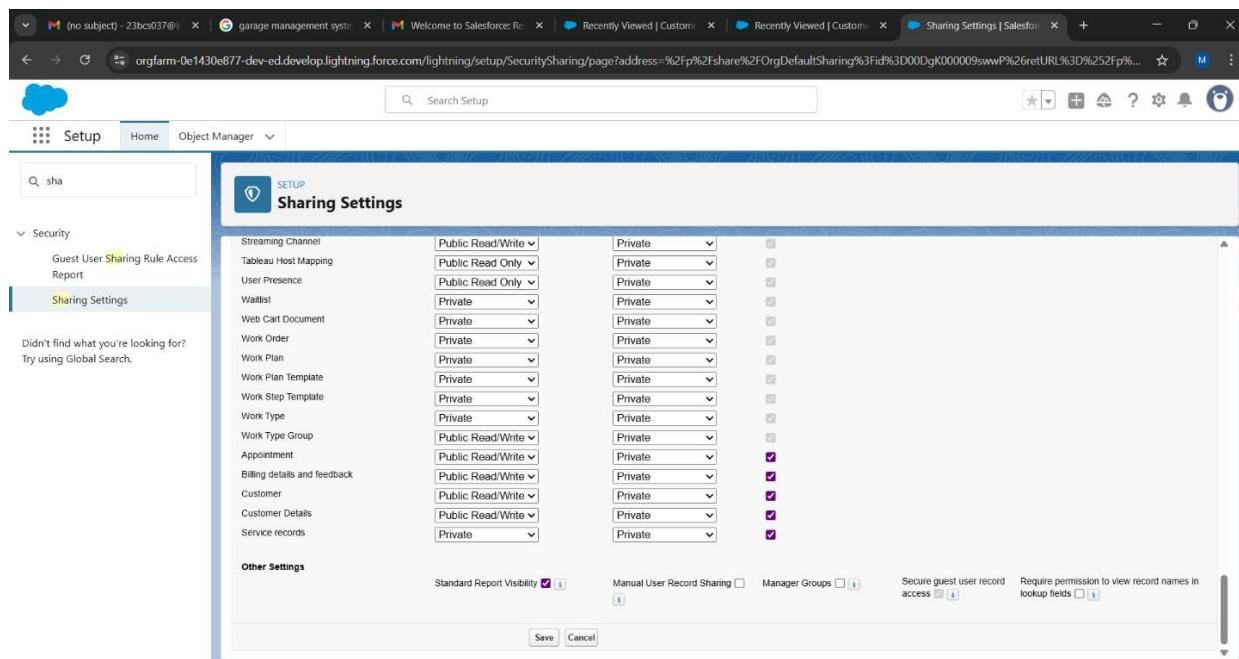
Full Name	Reason For Membership
Niklaus Mikaelson	Manager of Group Member
sathya.arya	Group Member
Annu kumar	Group Member

3.11 Creating Sharing Settings



The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. A new sharing rule is being created for 'Service records'. The rule is named 'Sharing_setting' and is owned by 'sales person'. It is shared with 'Manager' at the 'Read/Write' level. The rule was created by 'MANJULA DEVI' on 8/29/2025, 8:32 AM.

Label	Sharing setting
Rule Name	Sharing_setting
Description	
Service records: owned by members of	Role: sales person
Share with	Role: Manager
Access Level	Read/Write
Created By	MANJULA DEVI, 8/29/2025, 8:32 AM



The screenshot shows the 'Sharing Settings' page in the Salesforce Setup. The 'Sharing Settings' section is selected in the left sidebar. The page lists sharing rules for various objects, with checkboxes indicating if they are public or private. Some objects have checkboxes checked, while others are empty.

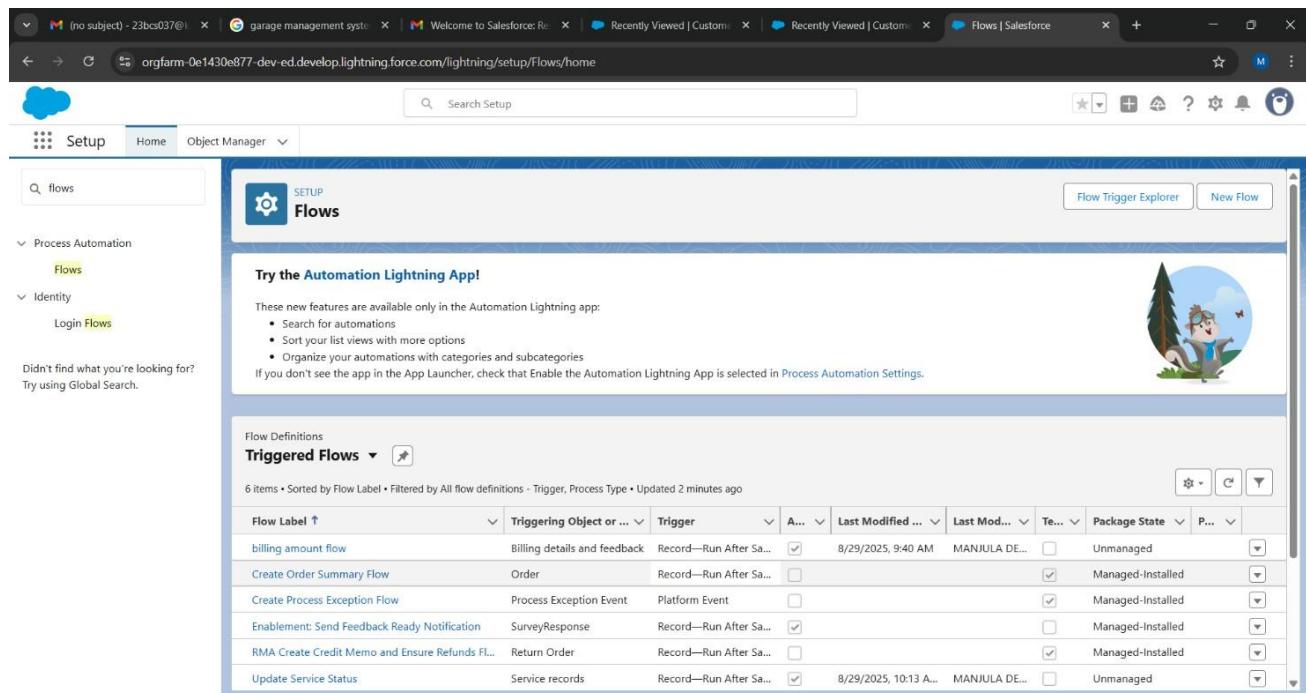
Object	Sharing Rule Type	Status
Streaming Channel	Public Read/Write	Private
Tableau Host Mapping	Public Read Only	Private
User Presence	Public Read Only	Private
Waitlist	Private	Private
Web Cart Document	Private	Private
Work Order	Private	Private
Work Plan	Private	Private
Work Plan Template	Private	Private
Work Step Template	Private	Private
Work Type	Private	Private
Work Type Group	Public Read/Write	Private
Appointment	Public Read/Write	Private
Billing details and feedback	Public Read/Write	Private
Customer	Public Read/Write	Private
Customer Details	Public Read/Write	Private
Service records	Public Read/Write	Private

Other Settings

- Standard Report Visibility:
- Manual User Record Sharing:
- Manager Groups:
- Secure guest user record access:
- Require permission to view record names in lookup fields:

3.12 Automation: Flows

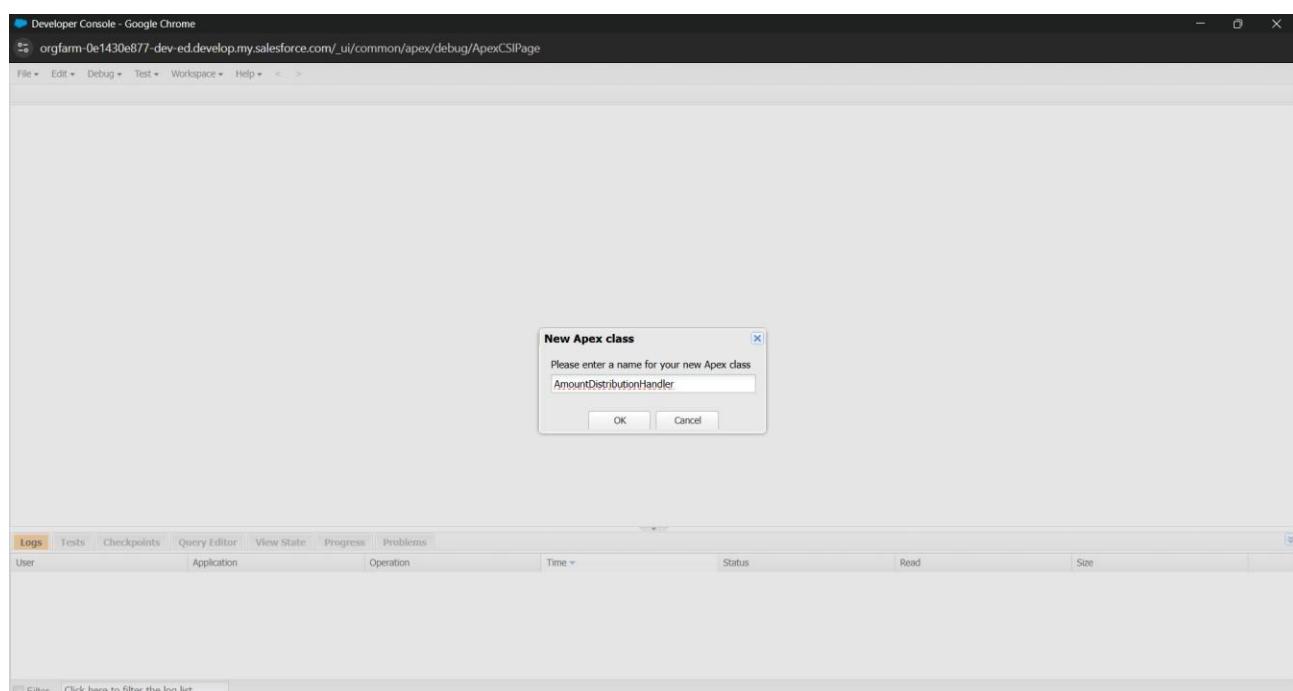
A Record-Triggered Flow was built on the Billing and Feedback object.



The screenshot shows the Salesforce Flows home page. On the left, there is a sidebar with categories like Process Automation (Flows selected) and Identity (Login Flows). The main area has a heading "Try the Automation Lightning App!" with a list of new features: Search for automations, Sort your list views with more options, Organize your automations with categories and subcategories. Below this is a "Flow Definitions" section titled "Triggered Flows". It displays a table with 6 items, sorted by Flow Label. The columns include Flow Label, Triggering Object or ..., Trigger, Last Modified..., Last Mod..., Te..., Package State, and P... . The rows show:

Flow Label	Triggering Object or ...	Trigger	Last Modified...	Last Mod...	Te...	Package State	P...
billing amount flow	Billing details and feedback	Record—Run After Sa...	8/29/2025, 9:40 AM	MANJULA DE...	<input checked="" type="checkbox"/>	Unmanaged	<input style="width: 20px; height: 20px;" type="button" value="..."/>
Create Order Summary Flow	Order	Record—Run After Sa...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed	<input style="width: 20px; height: 20px;" type="button" value="..."/>	
Create Process Exception Flow	Process Exception Event	Platform Event	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed	<input style="width: 20px; height: 20px;" type="button" value="..."/>	
Enablement: Send Feedback Ready Notification	SurveyResponse	Record—Run After Sa...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed	<input style="width: 20px; height: 20px;" type="button" value="..."/>	
RMA Create Credit Memo and Ensure Refunds Fl...	Return Order	Record—Run After Sa...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed	<input style="width: 20px; height: 20px;" type="button" value="..."/>	
Update Service Status	Service records	Record—Run After Sa...	8/29/2025, 10:13 A...	MANJULA DE...	<input checked="" type="checkbox"/>	Unmanaged	<input style="width: 20px; height: 20px;" type="button" value="..."/>

3.13 Create Apex Class



The screenshot shows the Salesforce Developer Console. At the top, there is a header bar with tabs like File, Edit, Debug, Test, Workspace, Help, and a search bar. In the center, a modal dialog is open titled "New Apex class". It contains a text input field with the value "AmountDistributionHandler". At the bottom of the dialog are two buttons: "OK" and "Cancel". Below the modal, the developer console interface is visible, showing tabs for Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The Logs tab is selected. At the bottom, there is a log list with a single entry:

User	Application	Operation	Time	Status	Read	Size

At the very bottom, there is a footer bar with a "Filter" button and a link "Click here to filter the log list".

Developer Console - Google Chrome

orgfarm-0e1430e877-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage

File • Edit • Debug • Test • Workspace • Help • < >

AmountDistributionHandler.apxc

Code Coverage: None • API Version: 64 • Go To

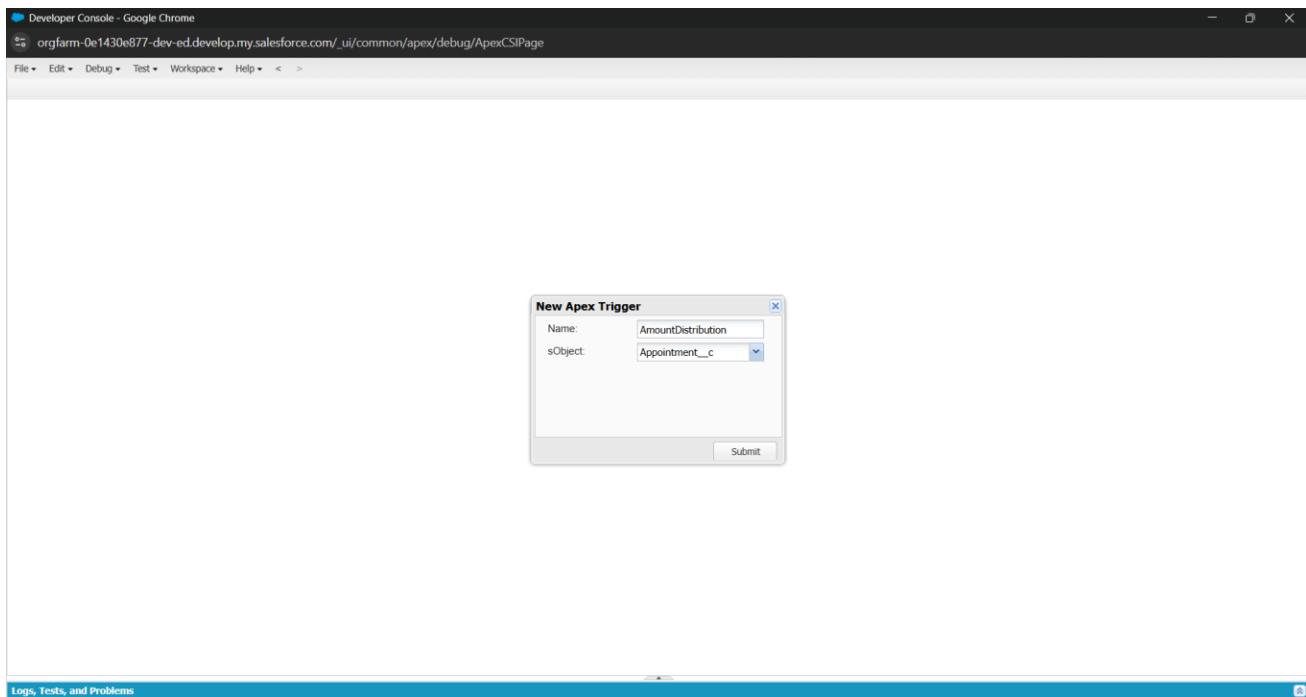
```

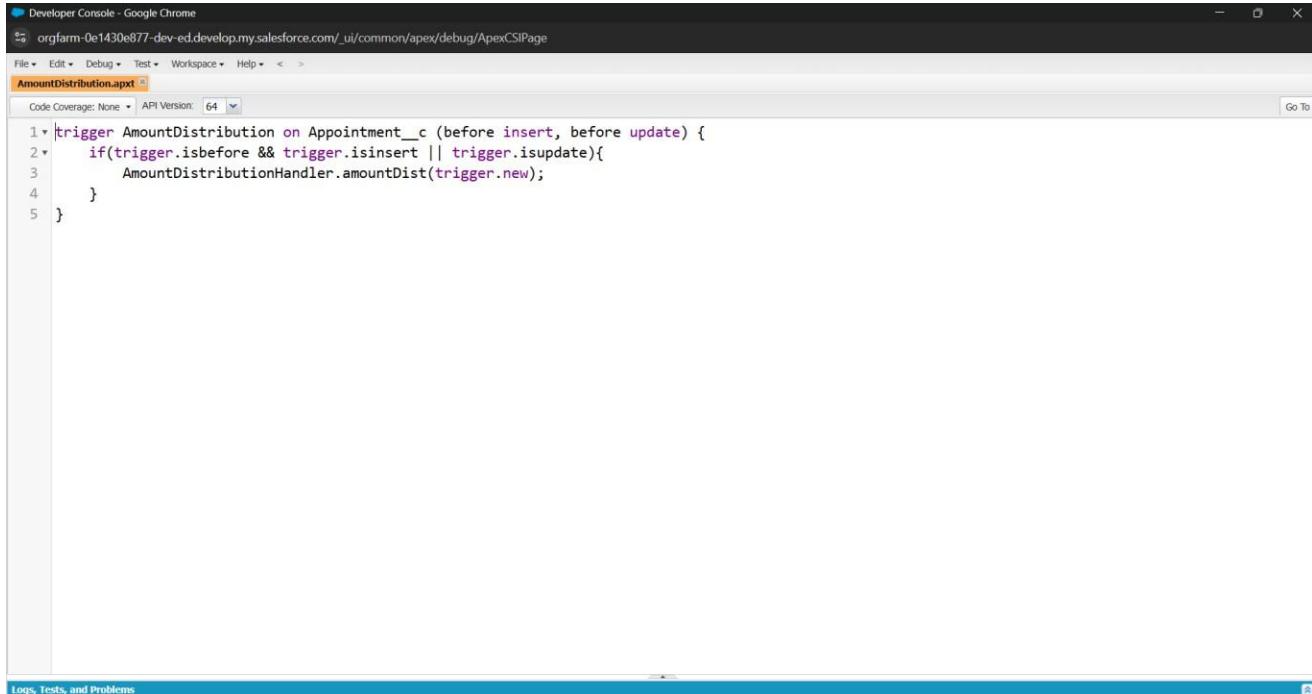
1 public class AmountDistributionHandler {
2     public static void amountDist(list<Appointment__c> listApp){
3         list<Service_records__c> serlist = new list <Service_records__c>();
4         for(Appointment__c app : listApp){
5             if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true)
6             {
7                 app.Service_Amount__c = 10000;
8             }
9             else if(app.Maintenance_service__c == true && app.Repairs__c == true){
10                 app.Service_Amount__c = 5000;
11             }
12             else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
13                 app.Service_Amount__c = 8000;
14             }
15             else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
16                 app.Service_Amount__c = 7000;
17             }
18             else if(app.Maintenance_service__c == true){
19                 app.Service_Amount__c = 2000;
20             }
21             else if(app.Repairs__c == true){
22                 app.Service_Amount__c = 3000;
23             }
24             else if(app.Replacement_Parts__c == true){
25                 app.Service_Amount__c = 5000;
26             }
27         }
28     }

```

Logs, Tests, and Problems

3.14 Create Apex Triggers





```

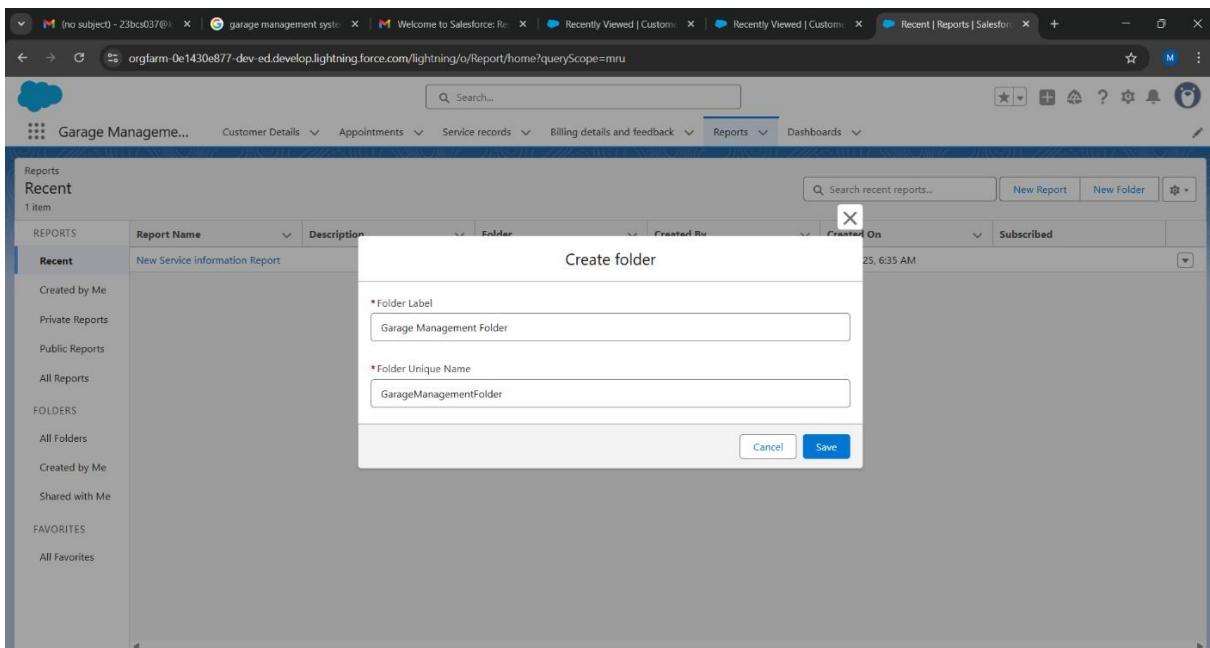
1 trigger AmountDistribution on Appointment__c (before insert, before update) {
2   if(trigger.isbefore && trigger.isinsert || trigger.isupdate){
3     AmountDistributionHandler.amountDist(trigger.new);
4   }
5 }
```

The screenshot shows the Salesforce Developer Console interface. The URL is orgfarm-0e1430e877-dev-ed.develop.my.salesforce.com/_ui/common/apex/debug/ApexCSIPage. The code editor window displays an Apex trigger named 'AmountDistribution.apxt'. The trigger has five lines of code. The first line starts with 'trigger' followed by the name 'AmountDistribution' and specifies the target object 'Appointment__c' with actions 'before insert' and 'before update'. The subsequent three lines contain logic to call a static method 'amountDist' from a class 'AmountDistributionHandler' on new records. The API version is set to 64.

3.15 Reporting

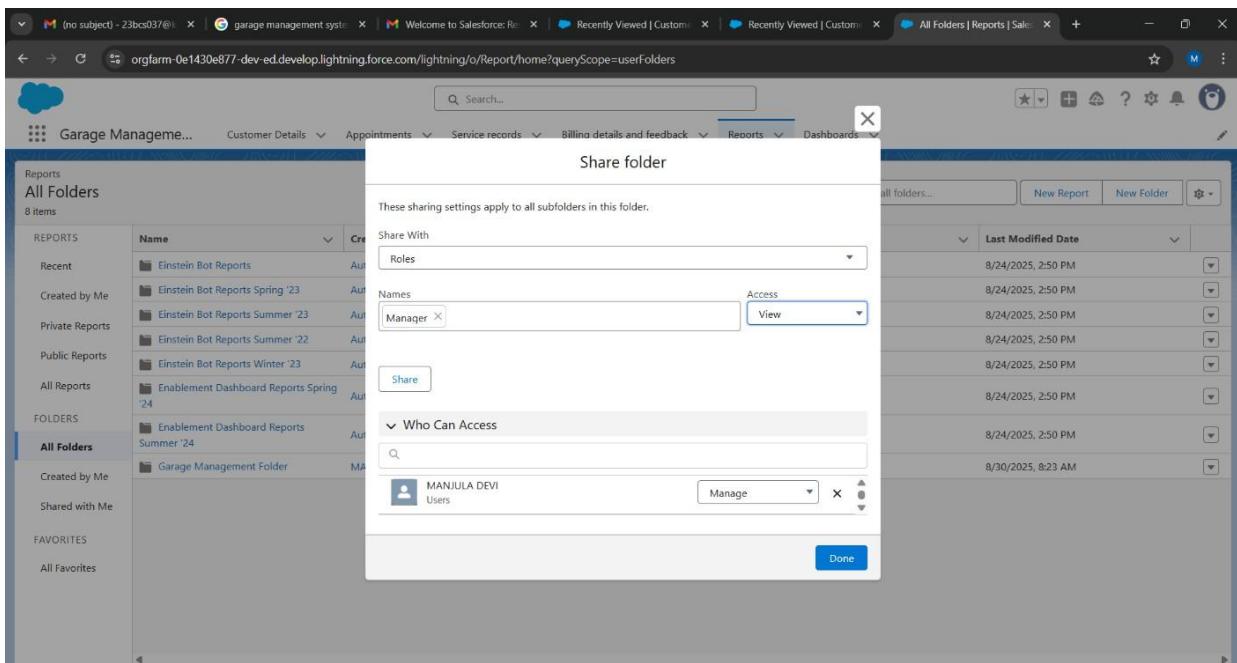
A custom report folder was created to organize all reports related to the application.

- **Report Example: "Service Information Report"**



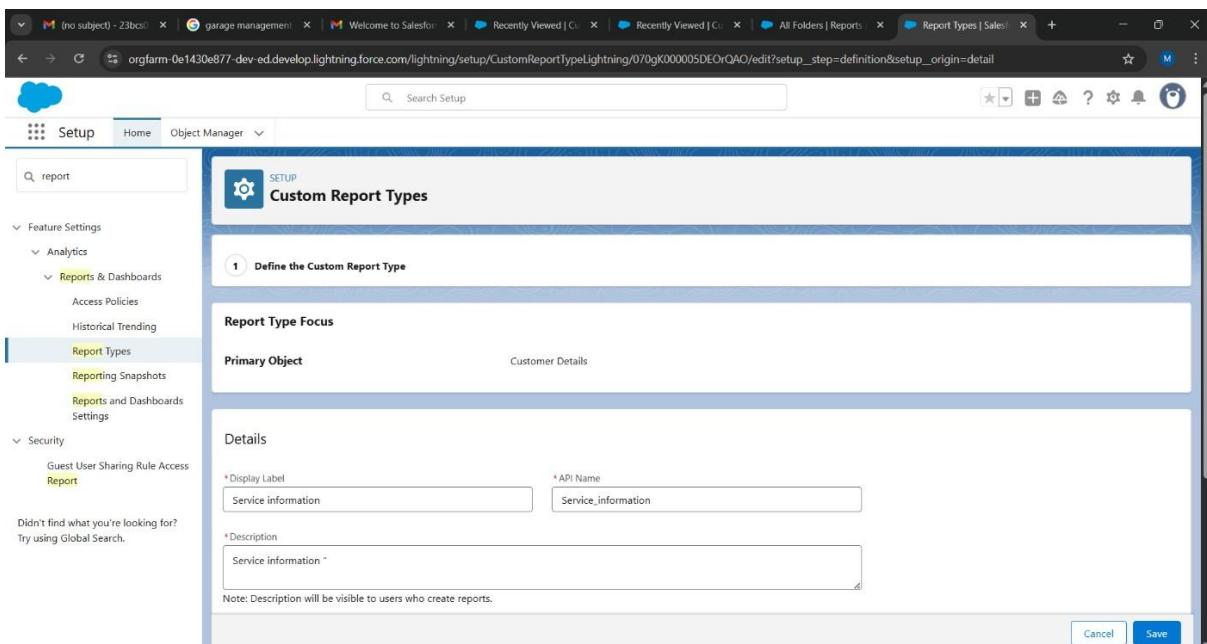
The screenshot shows the Salesforce Lightning interface. The user is navigating to the Reports section of the Garage Management system. A modal dialog box is open, titled 'Create folder', prompting the user to enter a 'Folder Label' (Garage Management Folder) and a 'Folder Unique Name' (GarageManagementFolder). The 'Reports' tab is selected in the top navigation bar. The sidebar on the left lists various report categories: Recent, Reports, Recent, Customer Details, Appointments, Service records, Billing details and feedback, Reports, Dashboards. The main area shows a list of recent reports, including 'New Service information Report'.

Sharing a report folder:



The screenshot shows the Salesforce sharing interface for a report folder named "Garage Management Folder". The "Share folder" dialog is open, showing sharing settings for all subfolders. Under "Share With", "Roles" are selected, and under "Names", "Manager" is assigned with "View" access. Under "Who Can Access", "MANJULA DEVI" is listed with "Manage" access. A "Done" button is visible at the bottom right of the dialog.

Create Report Type



The screenshot shows the "Custom Report Types" setup page. The left sidebar is expanded to show "Analytics" and "Report Types". The main area is titled "Define the Custom Report Type" and includes sections for "Report Type Focus" (Primary Object: Customer Details) and "Details". In the "Details" section, fields include "Display Label" (Service information), "API Name" (Service_information), and "Description" (Service information). A note at the bottom states: "Note: Description will be visible to users who create reports." At the bottom right are "Cancel" and "Save" buttons.

Search Setup

Setup Home Object Manager

report

Feature Settings

- Analytics
- Reports & Dashboards
- Access Policies
- Historical Trending
- Report Types
- Reporting Snapshots
- Reports and Dashboards
- Settings

Security

Guest User Sharing Rule Access Report

Didn't find what you're looking for? Try using Global Search.

Define Report Records Set

Select related objects to define which records are included in reports using this report type.

A Customer Details
Primary Object

B Appointments
A to B Relationship:
 Each "A" record must have at least one related "B" record.
 "A" records may or may not have related "B" records.

C Service records
B to C Relationship:
 Each "B" record must have at least one related "C" record.
 "B" records may or may not have related "C" records.

D Billing details and feedback

Venn diagram illustrating relationships between A, B, C, and D.

Cancel Save

Report

Search...

Customer Details Appointments Service records Billing details and feedback Reports Dashboards

REPORT New Service information Report Service information

Show Fields Filters

Fields

Groups

Rating for service

Payment Status

Columns

Customer Name Appointment Name Service Status # Payment Paid

Rating for service

Completed Total

	Sum of Payment Paid	Record Count	
3	\$24,000	4	\$24,000
4	\$23,000	5	\$23,000
5	\$3,000	1	\$3,000
Total	\$50,000	10	\$50,000

Update Preview Automatically

Sum of Payment Paid

Rating for service

Details (10 Rows)

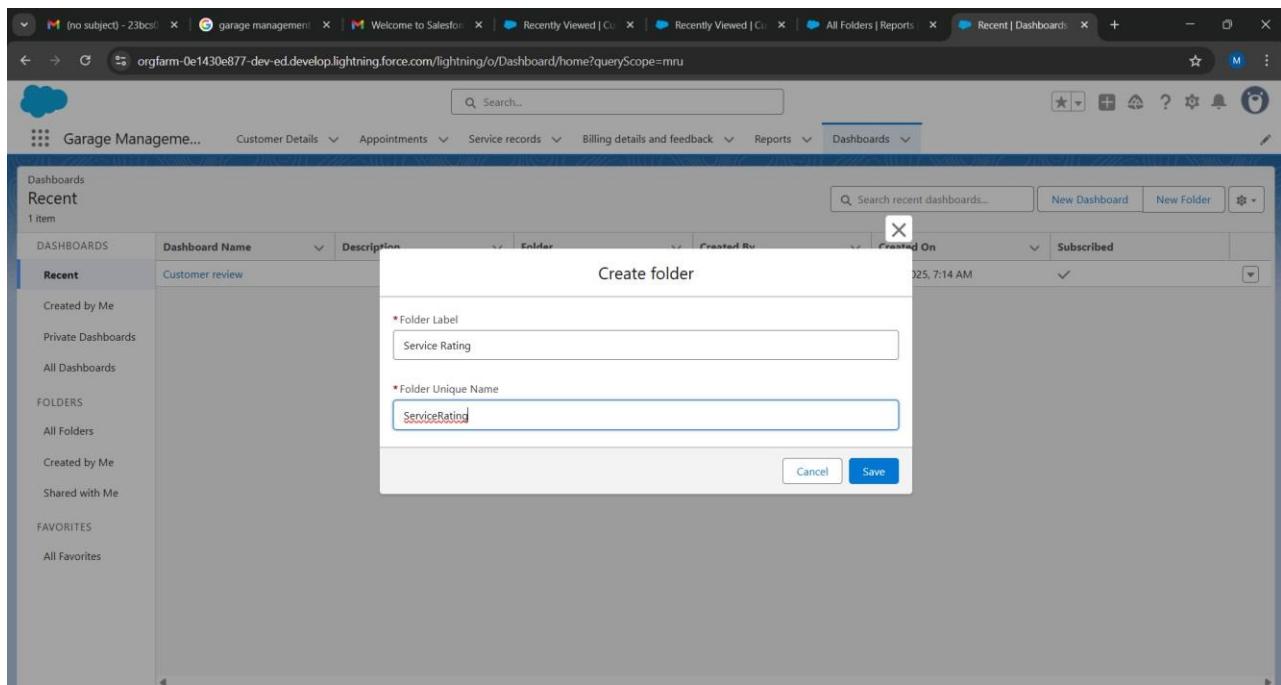
Customer Name	Appointment Name	Service Status	Payment Paid
Michel	app-002	-	\$8,000
Lina joe	app-007	-	\$2,000
Teena rose	app-005	-	\$7,000
Benjamin Reed	app-011	-	\$7,000
Mac	app-001	-	\$5,000
Sarina	app-004	-	\$7,000

Row Counts Detail Rows Grand Total Stacked Summaries Conditional Formatting

3.16 Dashboards

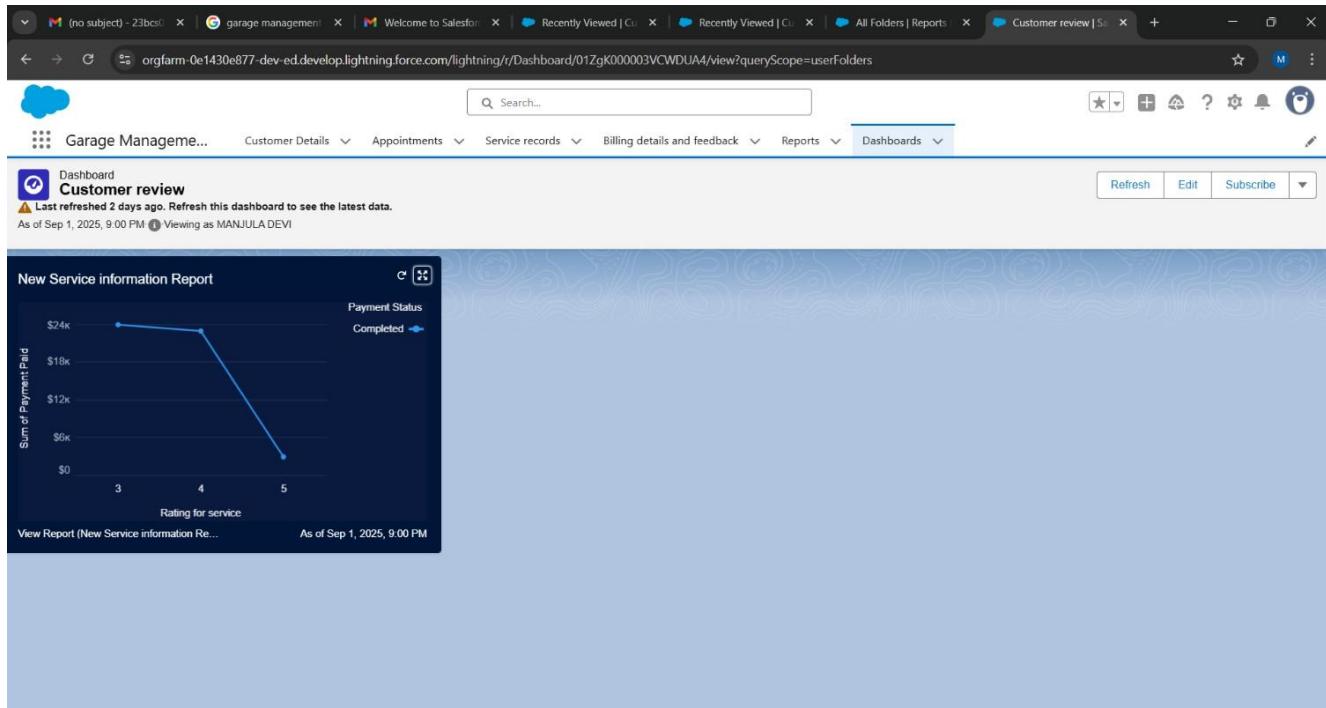
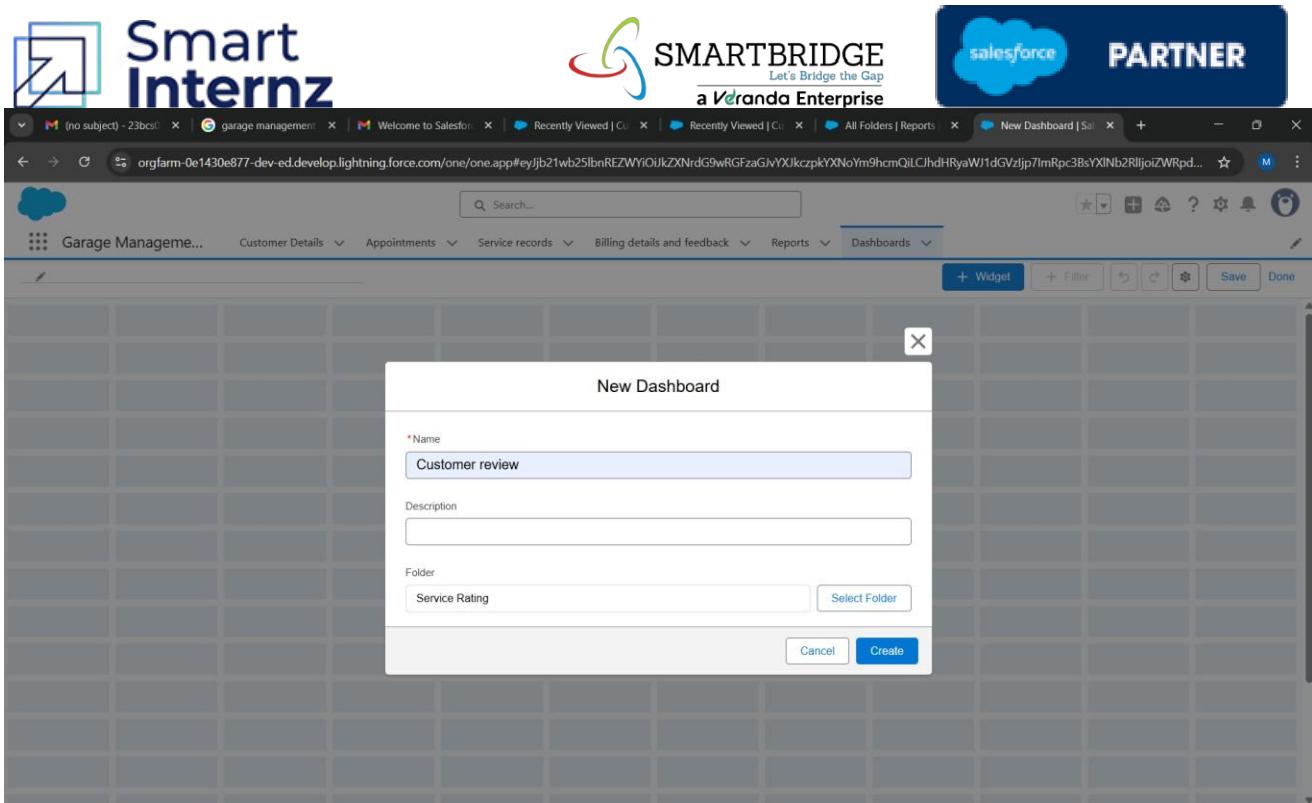
A dashboard was created to visualize the report data.

Create Dashboard Folder



The screenshot shows a Salesforce Lightning interface for managing dashboards. The top navigation bar includes links for 'garage management', 'Welcome to Salesforce', 'Recently Viewed', 'All Folders | Reports', and 'Recent | Dashboards'. The main header shows the 'Garage Management' tab is selected. A search bar is at the top right. Below it, a 'Dashboards' section displays a single item: 'Customer review' (Recent). To the right is a 'Create folder' dialog box with fields for 'Folder Label' (Service Rating) and 'Folder Unique Name' (ServiceRating). Buttons for 'Cancel' and 'Save' are at the bottom. On the left, a sidebar lists categories: DASHBOARDS (Recent, Created by Me, Private Dashboards, All Dashboards), FOLDERS (All Folders), and FAVORITES (All Favorites).

Create Dashboard



4. Application Walkthrough

4.1 Managing Customer Details

The screenshot shows a web browser window with several tabs open. At the top, there's a header for "Smart Internz" with a logo, followed by "SMARTBRIDGE Let's Bridge the Gap" and a "salesforce PARTNER" badge. Below this, the main content area is a Salesforce Lightning interface for "Customer Details". A sidebar on the left lists "Recently Viewed" customer names: Rachel joy, Sargina, Teena rose, Johnson, Michel, Lina joe, Sofia, James Harrison, Benjamin Reed, and Mac. The main form is titled "New Customer Details" and contains fields for "Customer Name" (set to "Sargina"), "Phone number" (9876543211), and "Gmail" (sargina09@gmail.com). The "Owner" field is set to "MANJULA DEVI". At the bottom of the form are "Cancel", "Save & New", and "Save" buttons.

This screenshot shows a web browser with multiple tabs open, including "Welcome to Salesforce" and "Recently Viewed" tabs. The main content area displays a "Garage Management" system interface. On the left, a "Recently Viewed" list shows customer names: Rachel joy, Sargina, Teena rose, Johnson, Michel, Lina joe, Sofia, James Harrison, Benjamin Reed, and Mac. The "Customer Name" field in the list is currently selected. The top navigation bar includes links for "Customer Details", "Appointments", "Service records", "Billing details and feedback", "Reports", and "Dashboards".

4.2 Scheduling Appointments

4.3 Logging Service Records

The screenshot shows a browser window with multiple tabs open. The active tab is titled "New Service records | Salesforce". The page displays a "Service records" list on the left and a "New Service records" form on the right. The form includes fields for "Service records Name" (set to "app-002"), "Owner" (set to "MANJULA DEVI"), "Appointment" (set to "Started"), and "Quality Check Status". The "Information" section is highlighted. At the bottom of the form are buttons for "Cancel", "Save & New", and "Save".

The screenshot shows a browser window with multiple tabs open. The active tab is titled "garage management | Salesforce". The page displays a "Service records" list. The first item in the list, "ser-001", is selected and highlighted with a blue border. The list contains 10 items labeled from 1 to 10. The top navigation bar includes links for "Customer Details", "Appointments", "Service records", "Billing details and feedback", "Reports", and "Dashboards".

4.4 Processing Billing and Feedback



Smart Internz

Inbox (671) - 23bcs037@pkcs.com | Login | Salesforce

SMARTBRIDGE
Let's Bridge the Gap
a Veranda Enterprise

salesforce PARTNER

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

Search...

Billing details and feedback Recently Viewed

10 items • Updated a few seconds ago

Billing details and feedback Name

- 1 bill-001
- 2 bill-010
- 3 bill-009
- 4 bill-008
- 5 bill-007
- 6 bill-006
- 7 bill-005
- 8 bill-004
- 9 bill-003
- 10 bill-002

New Billing details and feedback

* = Required Information

Information

Billing details and feedback Name

Service records

Payment Paid

Rating for service

Payment Status

Owner  MANJULA DEVI

Import Change Owner Assign Label

Cancel Save & New Save



Garage Management...

Welcome to Salesforce | Recently Viewed | Customer Details | Appointments | Service records | Billing details and feedback | Reports | Dashboards

Recently Viewed | Billing details and feedback | All Folders | Reports | Recently Viewed | Billing details and feedback |

Search...

Billing details and feedback Recently Viewed

10 items • Updated a few seconds ago

Billing details and feedback Name

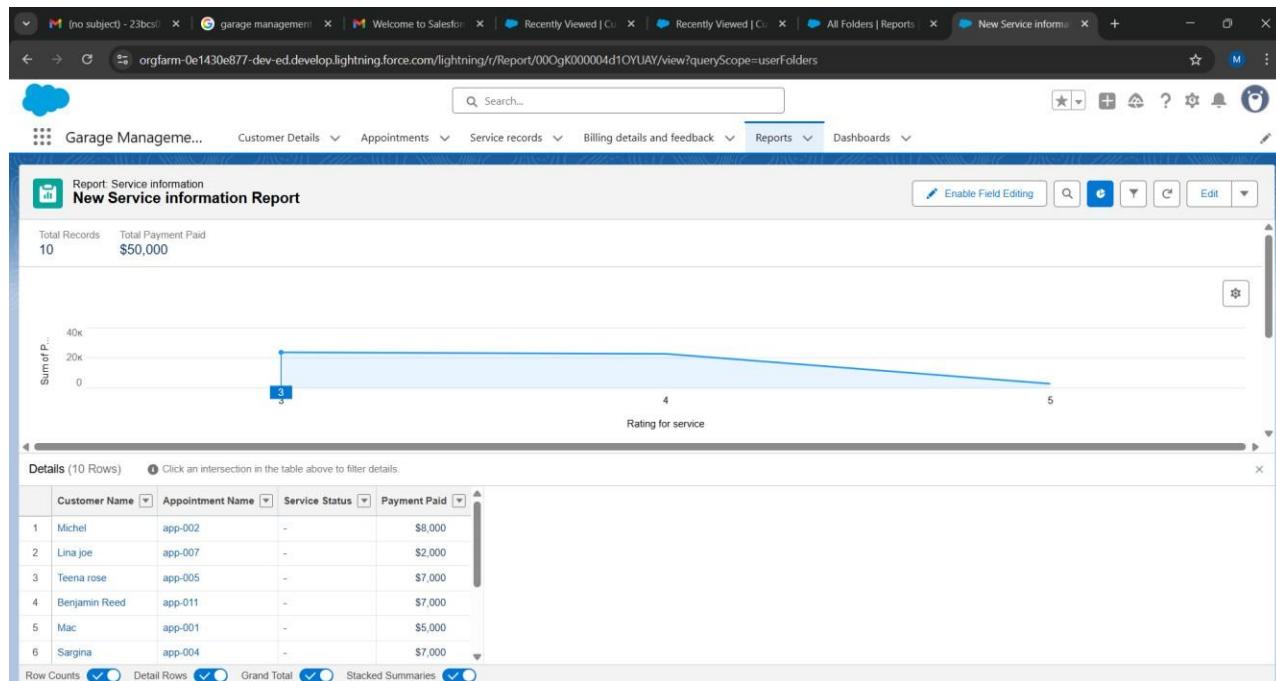
- 1 bill-001
- 2 bill-010
- 3 bill-009
- 4 bill-008
- 5 bill-007
- 6 bill-006
- 7 bill-005
- 8 bill-004
- 9 bill-003
- 10 bill-002

New Import Change Owner Assign Label

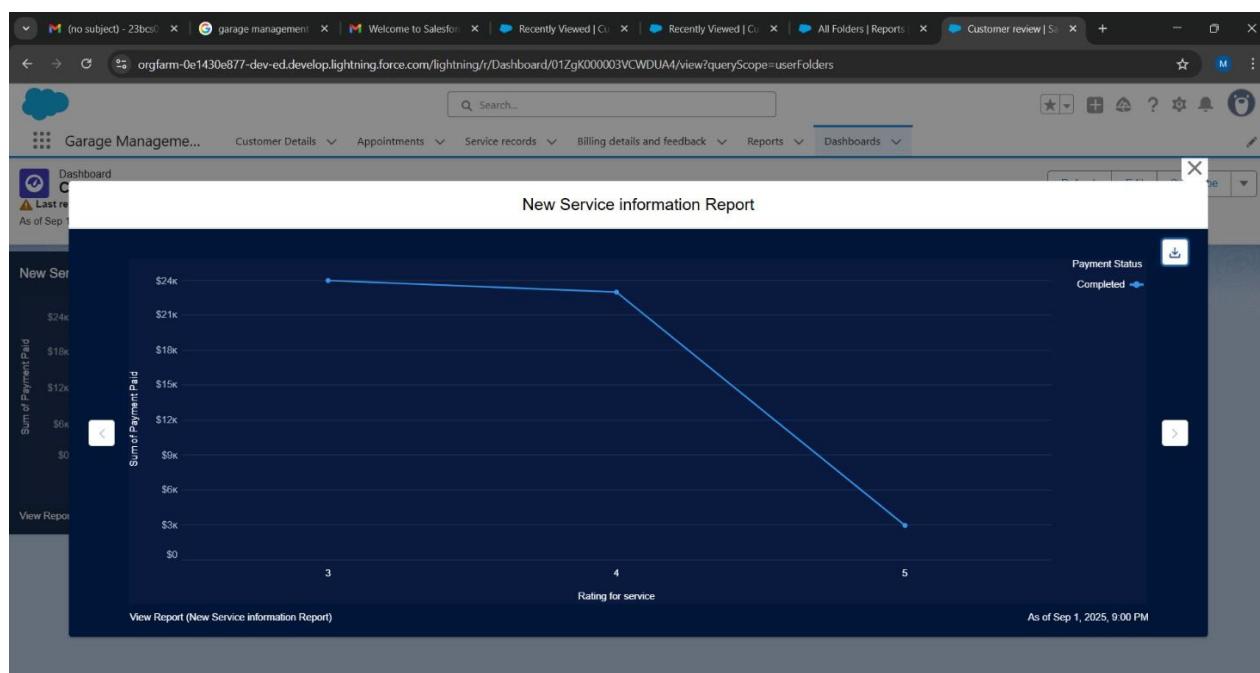
Search this list...

4.5 Analyzing Data with Reports and Dashboards

1. Reports



2. Dashboards



6. Conclusion

This project serves as a foundational model that can be extended with additional features such as inventory management for parts, integration with accounting software, SMS notifications for appointment reminders, and a customer portal for self-service. The system provides a significant competitive advantage by enhancing operational efficiency, improving customer satisfaction through organized service, and enabling data-driven strategic decisions for business growth.

7. Appendix

- Source Code: Provided in Apex Classes and Triggers

Apex class

AmountDistributionHandler.apxc:

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



```
else if(app.Repairs_c == true){  
    app.Service_Amount_c = 3000;  
}  
  
else if(app.Replacement_Parts_c == true){  
    app.Service_Amount_c = 5000;  
}  
}  
}  
}  
}
```

Apex Trigger

AmountDistribution.apxt:

```
trigger AmountDistribution on Appointment_c (before insert, before update) {  
    if(trigger.isbefore && trigger.isinsert || trigger.isupdate){  
        AmountDistributionHandler.amountDist(trigger.new);  
    }  
}
```