

PROJECT TITLE

GARAGE MANAGEMENT SYSTEM

College Name: OXFORD ENGINEERING COLLEGE

College Code: 8130

TEAM ID: NM2025TMID06242

TEAM MEMBERS : 4

- i) R.Ramarajan
- ii) C.Kaviyarasu
- iii) S.Thiruppathi
- iv) K.Kathiravan

Team LeaderName: R.Ramarajan

Email: ramarajanravi207@gmail.com

Team Member1: C.Kaviyarasu

Email: kaviyarasuk789@gmail.com

Team Member2: S.Thiruppathi

Email: thirupathiramar05@gmail.com

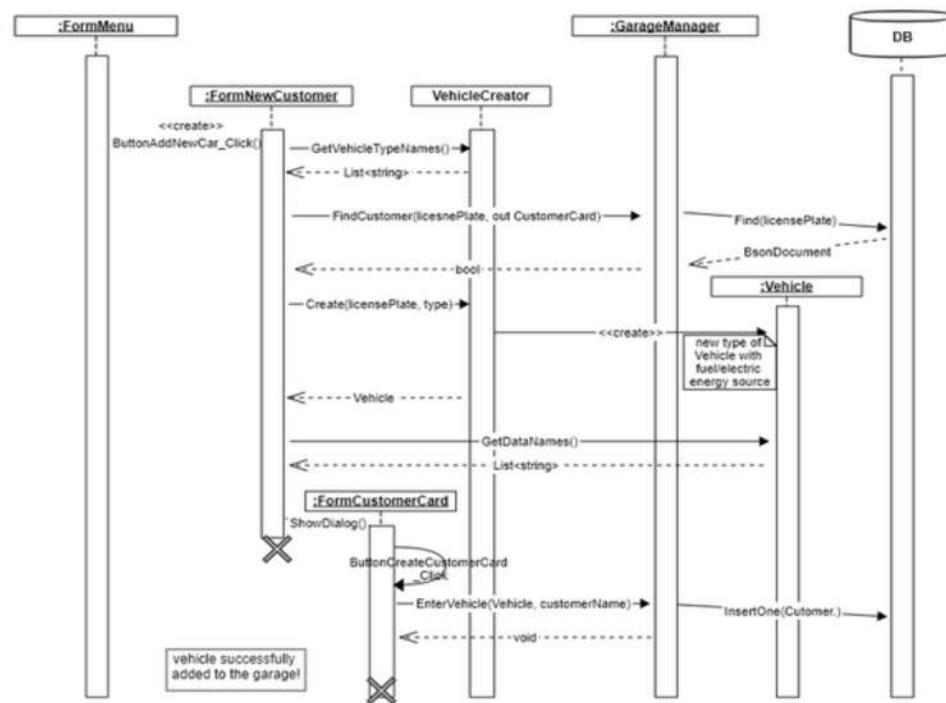
Team Member3: K.Kathiravan

Email: kkathirk2005@gmail.com

1.INTRODUCTION

1.1 Project Overview:

The Garage Management System in Salesforce is a cloud-based solution to manage garage operations efficiently. It handles customer data, vehicle records, service bookings, inventory, and billing in one platform. The system automates workflows and improves service delivery. Using Salesforce ensures scalability, real-time tracking, and better customer engagement. It is designed for garages seeking streamlined, data-driven operations.



1.2 Purpose :

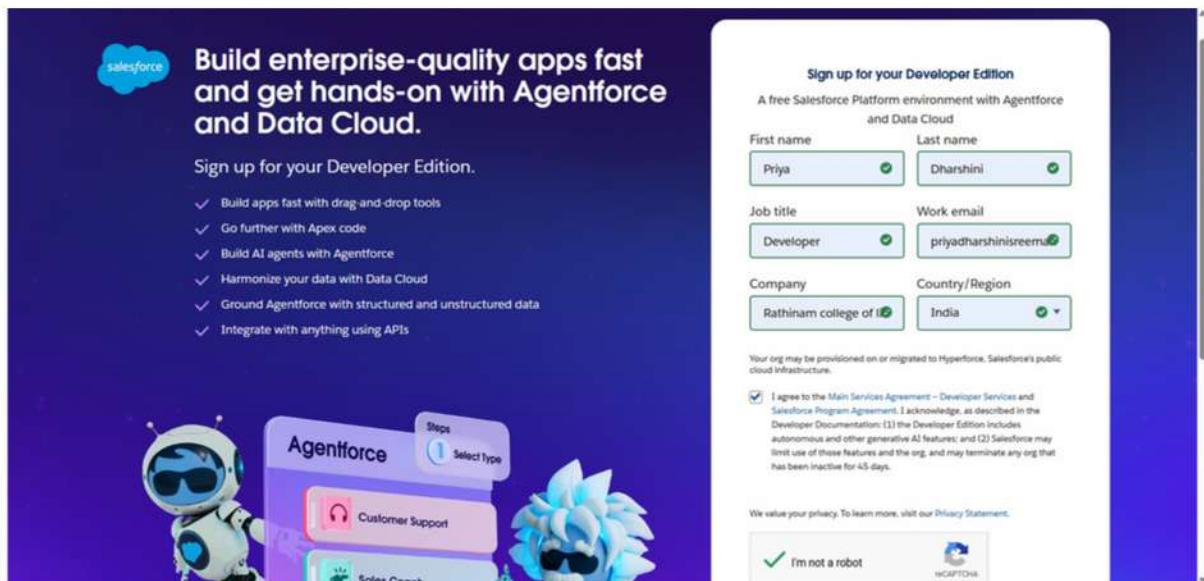
The **purpose of garage management** is to ensure the **efficient, safe, and cost-effective operation** of a garage—whether it's an automotive repair shop, service center, or fleet maintenance facility. It involves organizing and overseeing all aspects of the garage's operations to deliver high-quality service and maintain customer satisfaction.

Milestone 1: Salesforce

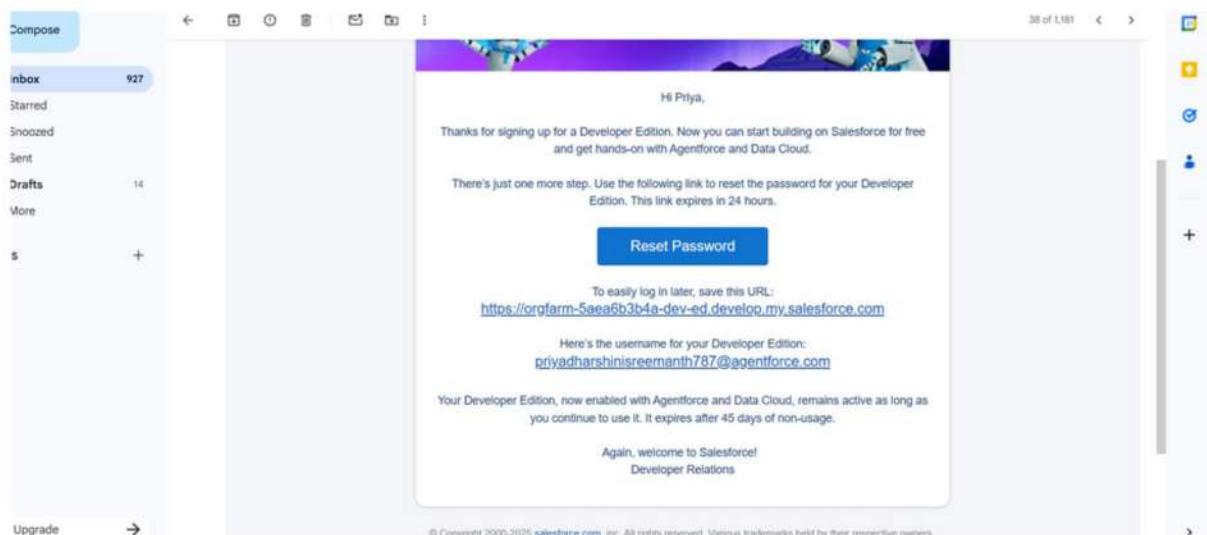
i) Creating Developer Account:

Using this URL-

<https://developer.salesforce.com/signup>

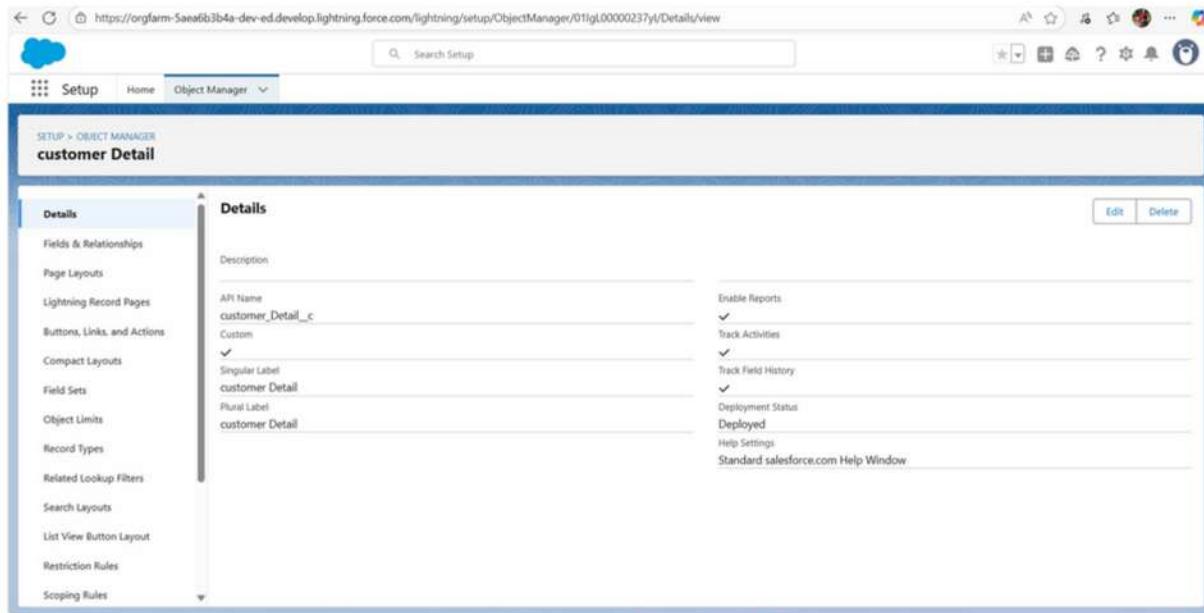


ii) Account Activation



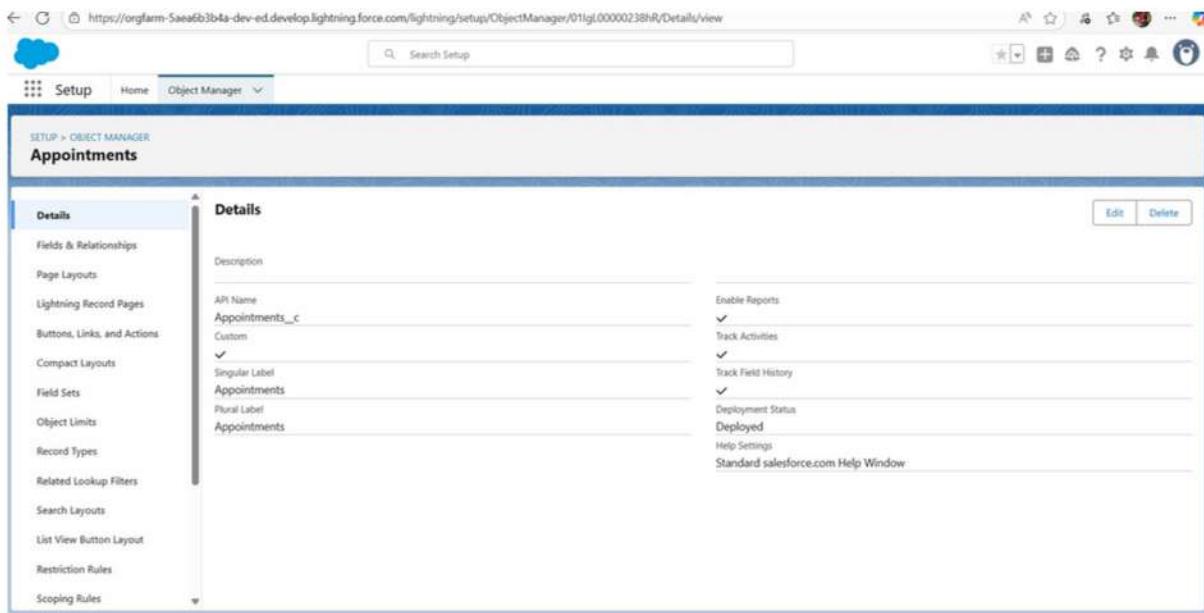
Milestone 2: Object

i)Creating customer detail:



The screenshot shows the Salesforce Setup interface for creating a new object. The URL is https://orgfarm-Saea6b3b4a-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgL00000237yL/Details/view. The page title is "customer Detail". The left sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main "Details" tab is selected. The API Name field is set to "customer_Detail__c". The Singular Label is "customer Detail" and the Plural Label is "customer Detail". Under "Enable Reports", "Track Activities" and "Track Field History" are checked. Deployment Status is set to "Deployed". Help Settings link points to "Standard salesforce.com Help Window".

ii)Creating Appointments:



The screenshot shows the Salesforce Setup interface for creating a new object. The URL is https://orgfarm-Saea6b3b4a-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgL00000238hR/Details/view. The page title is "Appointments". The left sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main "Details" tab is selected. The API Name field is set to "Appointments__c". The Singular Label is "Appointments" and the Plural Label is "Appointments". Under "Enable Reports", "Track Activities" and "Track Field History" are checked. Deployment Status is set to "Deployed". Help Settings link points to "Standard salesforce.com Help Window".

iii)Creating service records:

The screenshot shows the Salesforce Setup Object Manager interface. The left sidebar lists various object configuration options under 'SETUP > OBJECT MANAGER'. The main content area displays the 'Service records' object's details. The 'Details' tab is selected, showing the following configuration:

- Description:** Service records
- 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

At the bottom of the page, the URL is https://orgfarm-5aea6b3b4a-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/01lgL00000238mH/CompactLayouts/view.

iv) Creating Billing details and feedback:

The screenshot shows the Salesforce Setup Object Manager interface. The left sidebar lists various object configuration options under 'SETUP > OBJECT MANAGER'. The main content area displays the 'Billing details and feedback' object's details. The 'Details' tab is selected, showing the following configuration:

- Description:** Billing details and feedback
- API Name:** Billing_details_and_feedback_c
- Custom:** ✓
- Singular Label:** Billing details and feedback
- Plural Label:** Billing details and feedback
- Enable Reports:** ✓
- Track Activities:** ✓
- Track Field History:** ✓
- Deployment Status:** Deployed
- Help Settings:** Standard salesforce.com Help Window

At the bottom of the page, the URL is https://orgfarm-5aea6b3b4a-dev-ed.develop.lightning.force.com/one/one.app#/setup/ObjectManager/01lgL00000238mH/Details/view.

Milestone 3: Tabs

i)Creating custom tabs:

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. Under the 'Appointments' object, the 'Fields & Relationships' tab is active. A modal window titled 'Data Type' is open, listing various options: None Selected, Auto Number, Formula, Roll-Up Summary, Lookup Relationship, Master-Detail Relationship, External Lookup Relationship, Checkbox, Currency, Date, Date/Time, and Email. Each option has a detailed description below it.

The screenshot shows the Salesforce Setup interface with the 'Object Manager' tab selected. Under the 'Appointments' object, the 'Fields & Relationships' tab is active. A modal window titled 'New Custom Field' is open, showing 'Step 2. Enter the details'. The field label is set to 'Maintenance service', the default value is 'Unchecked', and the field name is 'Maintenance_service'. There is a checkbox for 'Add this field to existing custom report types that contain this entity' which is checked. The top right corner of the modal shows 'Help for this Page' and 'Step 2 of 4'.

ii)Creating Remaining Tabs

The screenshot shows the Salesforce Setup interface with the 'Tabs' page selected. The left sidebar has 'User Interface' expanded, with 'Tabs' selected. The main content area displays the 'Tabs' setup page, which lists various types of tabs: Custom Object Tabs, Web Tabs, Visualforce Tabs, Lightning Component Tabs, and Lightning Page Tabs. Each section includes a table with columns for Action, Label, Tab Style, and Description. A search bar at the top right says 'Search Setup'.

Milestone 4: The lightning app

i)Creating lightning app

The screenshot shows the Salesforce Setup interface with the 'App Manager' page selected. The left sidebar has 'Apps' expanded, with 'App Manager' selected. The main content area displays the 'Lightning Experience App Manager' page, which lists 27 items. The table columns are App Name, Developer Name, Description, Last Modified, App Type, and Version. Buttons for 'New Lightning App' and 'New External Client App' are at the top right. A search bar at the top right says 'Search Setup'.

New Lightning App

App Details & Branding

Give your Lightning app a name and description. Upload an image and choose the highlight color for its navigation bar.

App Details

* App Name:

* Developer Name:

Description:

App Branding

Image: Primary Color Hex:

Org Theme Options: Use the app's image and color instead of the org's custom theme

Next

12 Garage Management Application Garage_Management_Application
13 Lightning Usage App LightningInstrumentation View Adoption and Usage Metrics for Lightning Experience 9/7/2025, 9:38 A... Lightning ✓ 9/1/2025, 9:07 PM Lightning ✓

New Lightning App

Navigation Items

Choose the items to include in the app, and arrange the order in which they appear. Users can personalize the navigation to add or move items, but users can't remove or rename the items that you add. Some navigation items are available only for phone or only for desktop. These items are dropped from the navigation bar when the app is viewed in a format that the item doesn't support.

Available Items

Create

Selected Items

- customer Detail
- Appointments
- Service records
- Billing details and feedback
- Reports
- Dashboards

Next

12 Garage Management Application Garage_Management_Application
13 Lightning Usage App LightningInstrumentation View Adoption and Usage Metrics for Lightning Experience 9/7/2025, 9:38 A... Lightning ✓ 9/1/2025, 9:07 PM Lightning ✓

New Lightning App

User Profiles

Choose the user profiles that can access this app.

Available Profiles

Selected Profiles

No Profiles selected

Save & Finish

Milestone 5: Fields

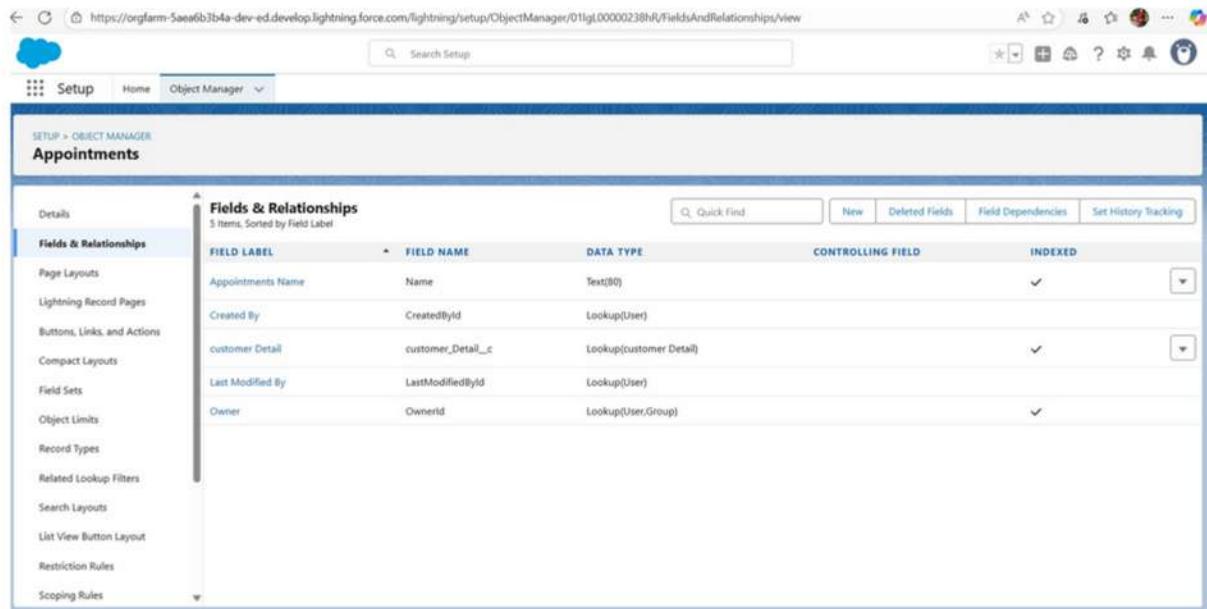
i) Creation of fields for the Customer Details object

customer Detail

Fields & Relationships

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
customer Detail Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
Phone	Phone__c	Phone		

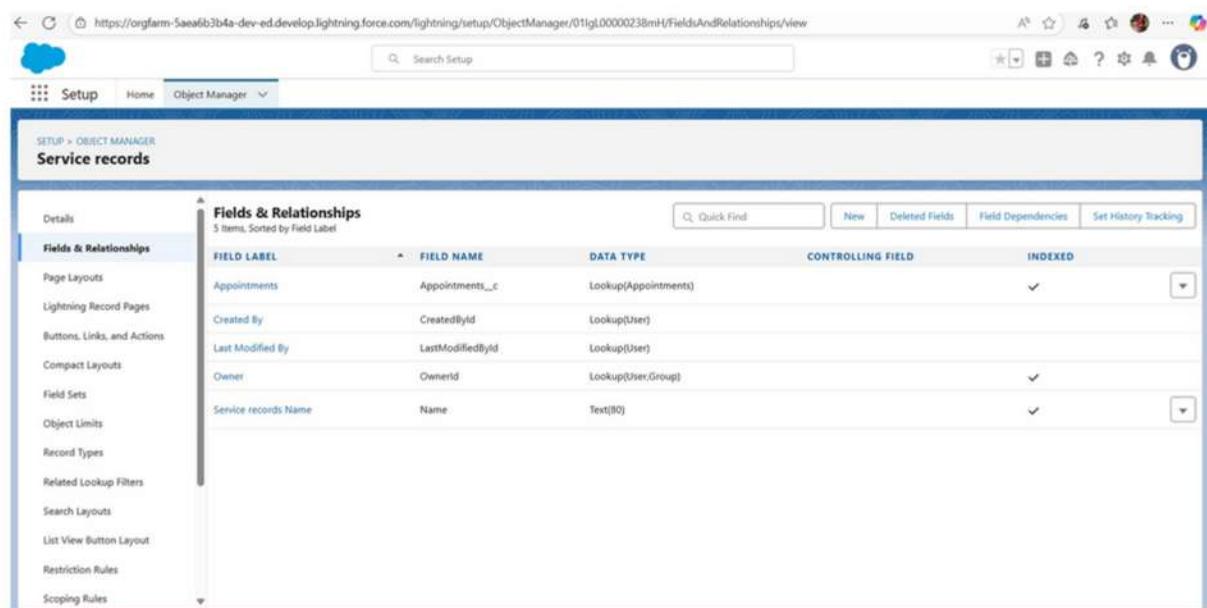
ii) Creation of Lookup Fields



The screenshot shows the Salesforce Object Manager interface for the 'Appointments' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled 'Fields & Relationships' and displays five fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointments Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
customer Detail	customer_Detail__c	Lookup(customer Detail)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓

iii) Creation of Checkbox Fields



The screenshot shows the Salesforce Object Manager interface for the 'Service records' object. The left sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled 'Fields & Relationships' and displays five fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointments	Appointments__c	Lookup(Appointments)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Service records Name	Name	Text(80)		✓

iv)Creation of date Fields

The screenshot shows the Salesforce Object Manager Fields & Relationships page for the 'Billing details and feedback' object. The left sidebar lists various setup options under 'Fields & Relationships'. The main area displays a table of fields:

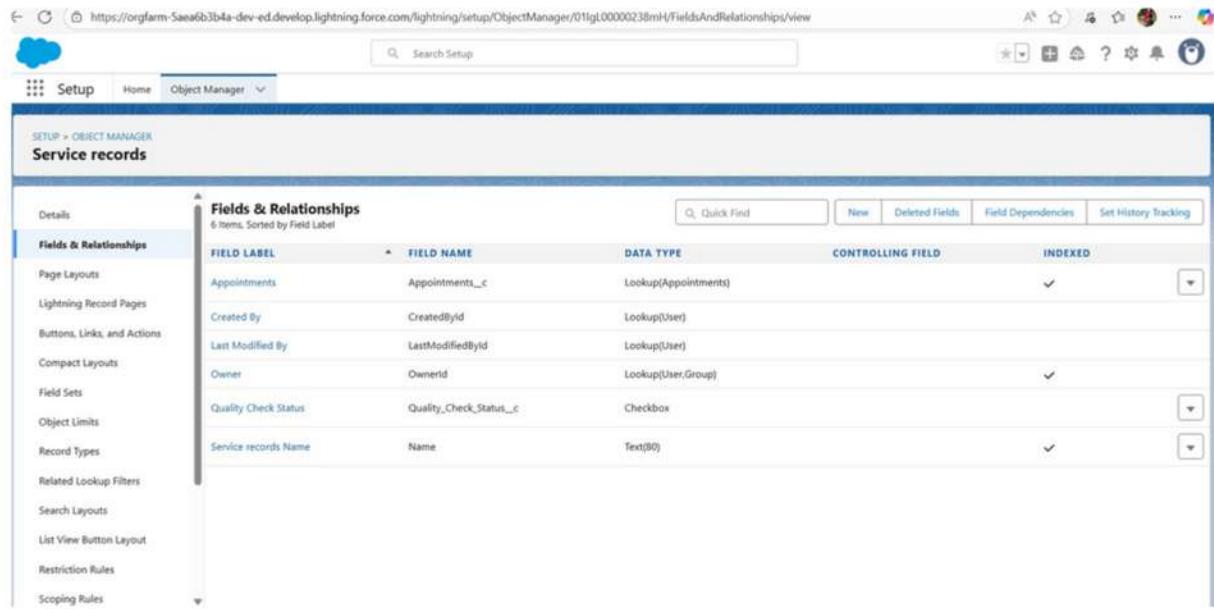
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Billing details and feedback Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User/Group)		✓
Service records	Service_records__c	Lookup(Service records)		✓

v)Creation of Currency Fields

The screenshot shows the Salesforce Object Manager Fields & Relationships page for the 'Appointments' object. The left sidebar lists various setup options under 'Fields & Relationships'. The main area displays a table of fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointments Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
customer Detail	customer_Detail__c	Lookup(customer Detail)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Maintenance service	Maintenance_service__c	Checkbox		
Owner	OwnerId	Lookup(User/Group)		✓
Repairs	Repairs__c	Checkbox		

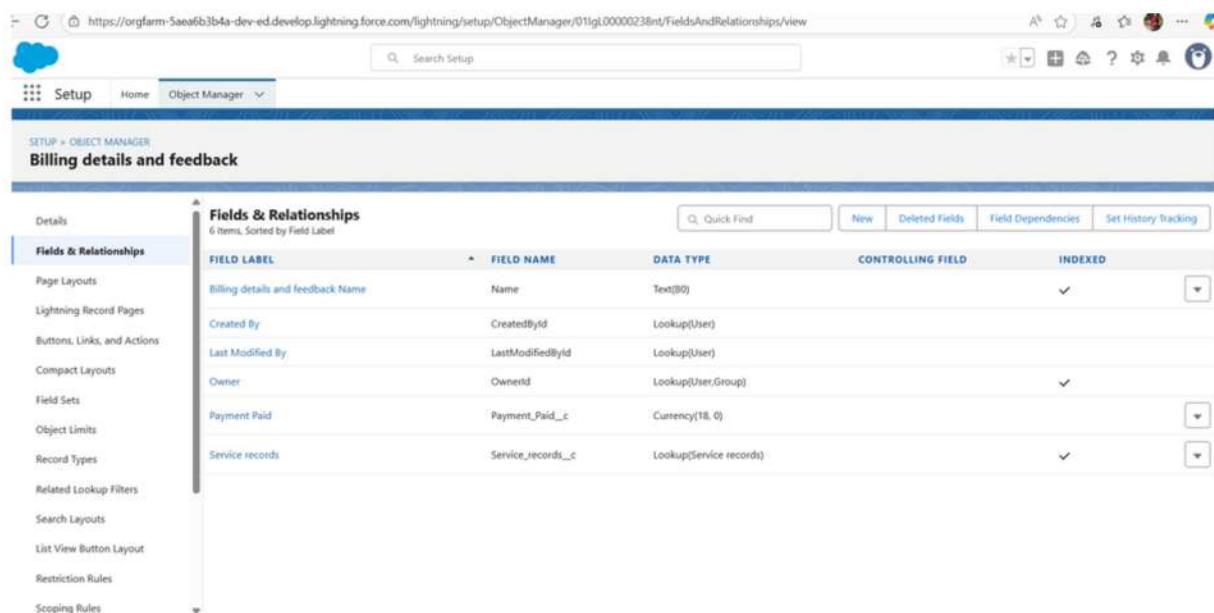
vi) Creation of Text Fields



The screenshot shows the Salesforce Object Manager interface for the 'Service records' object. The left sidebar is collapsed, and the main area displays the 'Fields & Relationships' section. A table lists six fields, including the newly created 'Service records Name' field, which is of type 'Text(80)'.

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointments	Appointments__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 records Name	Name	Text(80)		✓

vii) Creating Formula Field in Service records Object

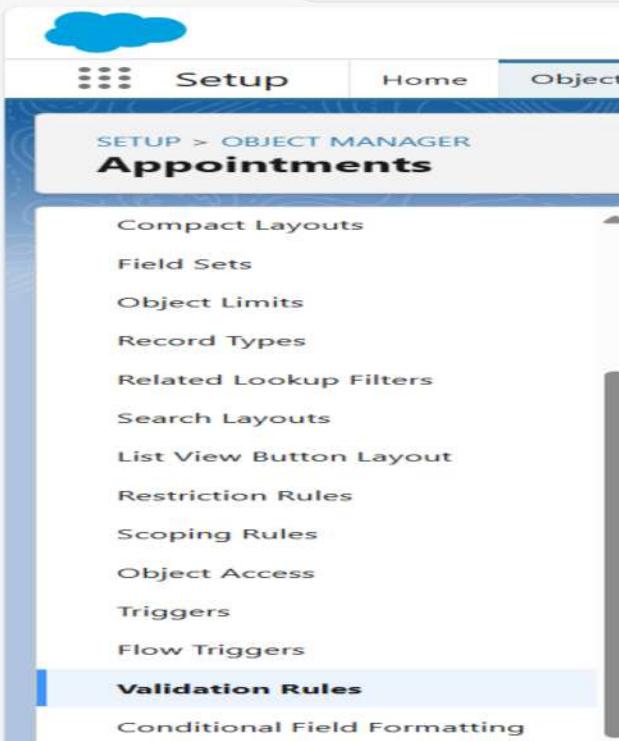


The screenshot shows the Salesforce Object Manager interface for the 'Billing details and feedback' object. The left sidebar is collapsed, and the main area displays the 'Fields & Relationships' section. A table lists six fields, including the newly created 'Payment Paid' field, which is of type 'Currency(18, 0)'.

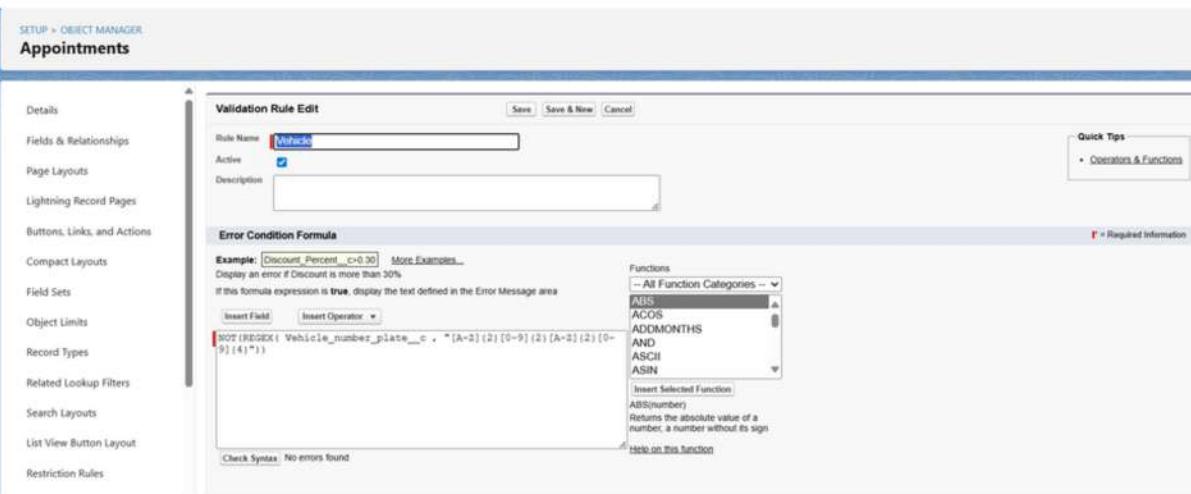
FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Billing details and feedback Name	Name	Text(80)		✓
Created By	CreatedById	Lookup(User)		
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Payment Paid	Payment_Paid__c	Currency(18, 0)		
Service records	Service_records__c	Lookup(Service records)		✓

Milestone 6: Validation rule

i) To create a validation rule to an Appointment Object



The screenshot shows the Salesforce Setup interface. The top navigation bar includes a cloud icon, 'Setup', 'Home', and 'Object'. Below this, the main title is 'SETUP > OBJECT MANAGER' followed by 'Appointments'. A vertical sidebar on the left lists various configuration options: Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, Validation Rules (which is highlighted), and Conditional Field Formatting.



The screenshot shows the 'Validation Rule Edit' screen for the 'Vehicle' object. The left sidebar lists standard object settings like Details, Fields & Relationships, Page Layouts, etc. The main area has tabs for 'Validation Rule Edit' (selected), 'Validation Message', and 'Validation Error'. The 'Validation Rule Edit' tab shows the following details:

- Role Name:** Vehicle
- Active:**
- Description:** (empty)
- Error Condition Formula:** `Discount_Percent__c>0.30`
- Functions:** A dropdown menu showing categories like ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, etc.
- Check Syntax:** No errors found.

Error Message

Example: Discount percent cannot exceed 30%

This message will appear when Error Condition formula is **true**

Error Message: Please enter valid number

This error message can either appear at the top of the page or below a specific field on the page

Error Location: Top of Page Field **Vehicle number plate** [i](#)

Save **Save & New** **Cancel** **Save**

https://orgfarm-5aea6b3b4a-dev-ed.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F03dgL00000QavB

Setup Home Object Manager

Object Manager

Appointments Validation Rule

Back to Appointments Help for this Page

Validation Rule Detail		Active	Modified By
Rule Name	Vehicle	<input checked="" type="checkbox"/>	Priya.Dharshini 9/8/2025, 1:02 AM
Error Condition Formula	NOT(REGEX(Vehicle_number_plate__c , "[A-Z][0-9][A-Z][0-9][0-9]"))		
Error Message	Please enter valid number	Error Location	Vehicle number plate
Description		Created By	
Created By	Esha.Dharshini 9/8/2025, 1:02 AM	Modified By	

ii) To create a validation rule to an Billing details and feedback Object

Validation Rules

1 Items, Sorted by Rule Name

RULE NAME	ERROR LOCATION	ERROR MESSAGE	ACTIVE	MODIFIED BY
rating_should_be_less_than_5	Rating for service	rating should be from 1 to 5	<input checked="" type="checkbox"/>	Priya Dharshini, 9/14/2025, 9:16 AM

Milestone 7: Duplicate rule

i) To create a matching rule to an Customer details Object

The image consists of three vertically stacked screenshots from the Salesforce Setup interface.

Screenshot 1: Matching Rules - All Matching Rules

This screenshot shows the "Matching Rules" page under the "Data" category in the sidebar. The page title is "Matching Rules". It displays a table with columns: Action, Rule Name, Object, Status, Description, Last Modified Date, and Last Modified By. A single row is visible: "Action: Match on Create", "Rule Name: Match customer detail", "Object: customer detail", "Status: Active", "Description: ", "Last Modified Date: 9/8/2025", and "Last Modified By: Enya Dhanzhu".

Screenshot 2: Matching Rules - New Matching Rule

This screenshot shows the "New Matching Rule" wizard. Step 1: Select object. The "Object" dropdown is set to "customer Detail". Step 2: Select fields. The "Field" dropdown is set to "Email". Step 3: Set matching criteria. The "Matching Criteria" section contains the condition "(customer Detail: Email EXACT MatchBlank = FALSE) AND (customer Detail: Phone EXACT MatchBlank = FALSE)".

Screenshot 3: Duplicate Rules - Customer Detail duplicate

This screenshot shows the "Customer Detail duplicate" page under the "Duplicate Management" category in the sidebar. It displays the "Duplicate Rule Detail" for the "Customer Detail duplicate" rule. The rule details are: "Rule Name: Customer Detail duplicate", "Object: customer Detail", "Record Level Security: Enforce sharing rules", "Action On Create: Allow", "Action On Edit: Allow", "Alert Text: Use one of these records?", "Active: checked", "Matching Rule: Matching customer details (Mapped)", "Conditions: ", and "Created By: Enya Dhanzhu, 9/8/2025, 1:17 AM". The "Operations On Create" and "Operations On Edit" sections show checkboxes for "Alert" and "Report".

ii) To create a Duplicate rule to an Customer details Object

The screenshot shows the Salesforce Setup interface under the Data category. A search bar at the top has 'duplic' typed into it. The main content area is titled 'Duplicate Rules' and shows a single record for 'Customer Detail duplicate'. The record details are as follows:

Field	Value
Role Name	Customer Detail duplicate
Description	
Object	customer Detail
Record-Level Security	Enforce sharing rules
Action On Create	Allow
Action On Edit	Allow
Alert Text	Use one of these records?
Active	<input checked="" type="checkbox"/>
Matching Rule	<input checked="" type="checkbox"/> Matching customer details Mapped
Conditions	
Created By	Priya Dharshini, 9/6/2025, 1:17 AM
Modified By	Priya Dharshini, 9/6/2025, 1:17 AM

Operations On Create and Operations On Edit sections show checkboxes for Alert and Report. The Matching Criteria field contains the expression: '(customer_Detail: Email Exact MatchBlank = FALSE) AND (customer_Detail: Phone Exact MatchBlank = FALSE)'. Action buttons at the bottom include Edit, Delete, Close, and Deactivate.

The screenshot shows the Salesforce Setup interface under the Data category. A search bar at the top has 'matching rules' typed into it. The main content area is titled 'Matching Rules' and shows a single record for 'Matching customer details'. The record details are as follows:

Field	Value
Object	customer Detail
Rule Name	Matching customer details
Unique Name	Matching_customer_details
Description	
Matching Criteria	(customer_Detail: Email Exact MatchBlank = FALSE) AND (customer_Detail: Phone Exact MatchBlank = FALSE)
Status	Inactive
Created By	Priya Dharshini, 9/6/2025

A modal window titled 'Matching Rule Activation' is displayed, containing the message: 'We're activating your matching rule. We'll send an email to priyadharshinireema@gmail.com when the activation process is complete.' with an 'OK' button. Action buttons at the bottom include Edit, Delete, Close, and Activate.

Milestone 8: Profiles

i) Manager Profile

Search Setup

Setup Home Object Manager

profiles

Users Profiles

Clone Profile

Enter the name of the new profile.

You must select an existing profile to clone from.

Existing Profile: Standard User

User License: Salesforce

Profile Name: Manager

Save Cancel

Setup Home Object Manager

profiles

Profiles

manage

With this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.

If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile.

[Log In](#) [Logout](#) [Enabled Apex Class Access](#) [Enabled Visualforce Page Access](#) [Enabled External Data Source Access](#) [Enabled Named Credential Access](#) [Enabled External Credential Principal Access](#) [Enabled Custom Metadata Type Access](#) [Enabled Custom Setting Definitions Access](#) [Enabled File Access](#) [Enabled Service Presence Status Access](#) [Enabled Custom Permissions](#)

Profile Detail

Name:	Manager	Custom Profile:	<input checked="" type="checkbox"/>
User License:	Salesforce Platform	Created By:	Ema Charles
Description:			
Created By:	Ema Charles	Modified By:	Ema Charles

Page Layouts

Standard Object Layouts	Global	Lead
Email Application	[View Assignment]	[View Assignment]
Home Page Layout	[View Assignment]	[View Assignment]
Account	[View Assignment]	[View Assignment]
Alternative Payment Method	[View Assignment]	[View Assignment]
		Location Group Assignment
		Location Group Assignment
		Object Milestone

Custom App Settings

	Visible	Default		Visible	Default
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>	Platform (standard__Platform)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__AppLauncher)	<input type="checkbox"/>	<input type="radio"/>	WDC (standard__Work)	<input type="checkbox"/>	<input type="radio"/>
Garage Management Application (Garage_Management_Application)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>			

Service Provider Access

Tab Settings

Contact Point Emails	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	User External Credentials	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Custom Object Permissions			
Appointments	<input checked="" type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/>	customer Detail	<input checked="" type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/>
Billing details and feedback	<input checked="" type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/>	Service records	<input checked="" type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/>

Session Settings

ii) sales person Profile

Contact Point Consents	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Streaming Channels	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	User External Credentials	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Custom Object Permissions			
Appointments	<input checked="" type="checkbox"/> <input type="checkbox"/>	customer Detail	<input checked="" type="checkbox"/> <input type="checkbox"/>
Billing details and feedback	<input checked="" type="checkbox"/> <input type="checkbox"/>	Service records	<input checked="" type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

Session Settings

Session Times Out After

Session Security Level Required at Login

Password Policies

The screenshot shows the Salesforce Setup interface with the URL <https://orgfarm-5ae6b3b4a-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00eL000004UCEL%3Fsetupid%3DEnhancedProfiles%26appLayout%3D...>. The page title is "Profiles". The left sidebar shows "Q, prof" under "Users" and "Profiles" is selected. The main content area shows the "Manager" profile details. The "Profile Detail" section includes fields for Name (Manager), User License (Salesforce), Description, Created By (Enya Chanshi), and Modified By (Enya Chanshi). The "Page Layouts" section lists standard object layouts for Global, Email Application, Home Page Layout, Account, Alternative Payment Method, and Appointment Invitation. The "Location Group Assignment" section lists Macro, Object Milestone, Operating Hours, and Opportunity. A note at the top states: "Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information. If your organization uses Record Types, use the Edit links in the Record Type Settings section below to make one or more record types available to users with this profile." A link to "Help for this Page" is also present.

Milestone 9: Role & Role Hierarchy

i) Creating Manager Role

The screenshot shows the Salesforce Setup Roles page. On the left, there's a sidebar with 'Users' and 'Roles' selected. The main content area has a title 'Understanding Roles' with a sub-section 'Sample Role Hierarchy'. It shows a hierarchy diagram with arrows indicating relationships:

- Executive Staff** (CEO, President, CFO, VP_Sales)
- Western Sales Director** (W.Sales)
- Eastern Sales Director** (E.Sales)
- International Sales Director** (Int'l Sales)
- Western Sales Rep** (CA Sales Rep, OR Sales Rep)
- Eastern Sales Rep** (NY Sales Rep, MA Sales Rep)
- International Sales Rep** (Asian Sales Rep, European Sales Rep)

Each role has a description of its permissions:

- Executive Staff:** View & edit data, roll up forecasts, & generate reports for all users below. Can't access data of other Executive Staff.
- Western Sales Director:** View & edit data, roll up forecasts, & generate reports for all users directly below. Can't access data of users above or at same level.
- Eastern Sales Director:** View & edit data, roll up forecasts, & generate reports only for own data. Can't access data of users above or at same level.
- International Sales Director:** View & edit data, roll up forecasts, & generate reports only for own data. Can't access data of users above or at same level.

At the bottom right, there are 'Set Up Roles' and 'Don't show this page again' buttons.

The screenshot shows the Salesforce Setup Roles page. The sidebar is identical to the previous one. The main content area has a title 'Creating the Role Hierarchy' with a sub-section 'Your Organization's Role Hierarchy'. It displays a hierarchical tree of roles:

- College of liberal arts and science** (Rathinam college of liberal arts and science, Tips global Kovilpalayam)
 - CEO** (Edit | Del | Assign)
 - CFO** (Edit | Del | Assign)
 - COO** (Edit | Del | Assign)
 - Manager** (Edit | Del | Assign)
 - salesperson** (Edit | Del | Assign)
 - SVP.Customer.Service.& Support** (Edit | Del | Assign)
 - Customer.Support.International** (Edit | Del | Assign)
 - Customer.Support.North America** (Edit | Del | Assign)
 - Installation & Repair Services** (Edit | Del | Assign)

The screenshot shows the Salesforce Setup interface for creating a new role. The left sidebar lists various setup categories like Cases, Contacts, and Objects. The main area is titled 'New Role' under 'Role Edit'. The 'Label' field is set to 'manager', the 'Role Name' field is also 'manager', and the 'This role reports to' field is set to 'CEO'. A note below says 'Role Name as displayed on reports' is 'managed'. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons.

The screenshot shows the details of the 'Manager' role. The 'Role Detail' section includes fields for 'Label' (Manager), 'Modified By' (Priya Charshee), 'Opportunity Access' (edit all opportunities), and 'Case Access' (edit all cases). It also shows the 'Hierarchy' (Rathnam college of liberal arts and science @ Tips global Kovipatnayam > CEO > Manager) and 'Sharing Groups' (Role, Role and Internal Subordinates). Below this is a table for 'Users in Manager Role' which is currently empty. At the bottom are 'Assign Users to Role' and 'New User' buttons.

ii)Creating another roles

The top screenshot shows the 'Roles' page in the Salesforce Setup. The sidebar includes links for Sales, Service, and Case Teams. The main area lists various roles under categories like CEO, Manager, and VPs. The 'sales_person' role is highlighted.

The bottom screenshot shows the detailed view for the 'sales_person' role. It displays the role's label ('sales person'), reporting to 'Manager', modified by 'Extra_Users', and having 'Opportunity Access' and 'Case Access'. It also shows the 'Role Detail' section with fields for 'Label' (sales person), 'Modified By' (Extra_Users), 'Opportunity Access' (Users can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities), and 'Case Access' (Users can edit all cases associated with accounts that they own, regardless of who owns the cases). The 'Users in sales person Role' section shows no records displayed.

Milestone 10: Users

i) Create User

The screenshot shows the Salesforce Setup interface with the 'Users' tab selected. On the left, there's a sidebar with various setup categories like 'Permission Set Groups', 'Profiles', and 'Roles'. The main area is titled 'New User' under 'User Edit' and 'General Information'. The user details entered are:

Field	Value
First Name	priya
Last Name	Priya Dharshini
Alias	ppry
Email	priyadharshinesreemanth@gmail.com
Username	sirishy5@agentforce.com
Nickname	User175785039677767620
Title	
Company	Developer
Department	
Division	

On the right, there are sections for 'Role' (set to '<None Specified>'), 'User License' (set to 'Force.com - Free'), 'Profile' (set to 'Force.com - Free User'), and 'Active' status (checked). Below these are several checkboxes for user types like Marketing User, Offline User, etc., and a dropdown for 'Data.com User Type' set to 'None'. At the bottom, there are buttons for 'Save', 'Save & New', and 'Cancel'.

ii) creating another users

The screenshot shows the 'User Detail' page for 'Niklaus Mikaelson'. The sidebar on the left has the 'Users' tab selected. The main area displays the user's information and settings. The user details are:

Name	Niklaus Mikaelson
Alias	nmika
Email	priyadharshinesreemanth@gmail.com (Archived)
Username	priyashy5@agentforce.com
Nickname	na
Title	
Company	
Department	
Division	
Address	India
Time Zone	(GMT-07:00) Pacific Daylight Time (America/Los_Angeles)
Locale	English (United States)
Language	English
Delegated Approver	Manager
Receive Approval Request Emails	Only if I am an approver
Federation ID	

On the right, there are sections for 'Role' (set to 'Manager'), 'User License' (set to 'Salesforce'), 'Profile' (set to 'Manager'), and 'Active' status (checked). Below these are checkboxes for user types like Marketing User, Offline User, etc., and a dropdown for 'Data.com User Type' set to 'None'. At the bottom, there are buttons for 'Edit', 'Sharing', 'Reset Password', 'Freeze', and 'View Summary'.

Milestone 11: Public groups

i)Creating New Public Group

The screenshot shows the Salesforce Setup interface with the URL [https://orgfarm-5ae6b3b4a-dev-ed.lightning.force.com/lightning/setup/PublicGroups/page?address=%2Fp%2Fown%2FOrgPublicGroupsPage%2Fd%3freURL%3D%252Fsetup%252F](https://orgfarm-5ae6b3b4a-dev-ed.lightning.force.com/lightning/setup/PublicGroups/page?address=%2Fp%2Fown%2FOrgPublicGroupsPage%2Fd%3FreURL%3D%252Fsetup%252F). The left sidebar is titled 'Setup' and includes sections for Users (Public Groups), Feature Settings, User Interface, Company Settings, and Publisher Layouts. The 'Public Groups' section is selected. The main content area is titled 'Public Groups' and contains a table with one row:

Action	Label	Group Name	Created By	Created Date
Edit Del	Sales_Team	Sales Team	Charles_Etta	9/8/2025, 9:30 AM

Milestone 12: Share setting

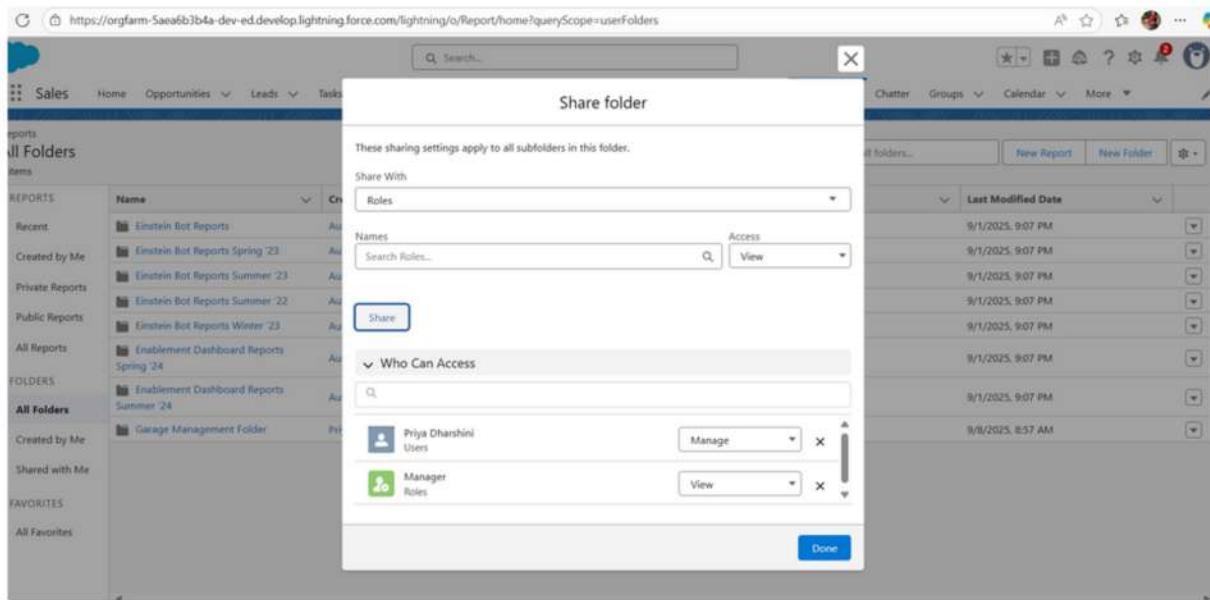
i)Creating Sharing settings

The screenshot shows the Salesforce Reports interface with the URL <https://orgfarm-5ae6b3b4a-dev-ed.lightning.force.com/lightning/reports/reports>. The left sidebar shows 'Recent' reports. A modal window titled 'Create folder' is open, prompting for a 'Folder Label' (Garage Management Folder) and a 'Folder Unique Name' (GarageManagementFolder). The background shows a list of recent reports and a message about recent reports.



The folder named Garage Management Folder was created.





Milestone 13: Flows

i) Create a Flow

Flow Label	Process Type	Active	Tem...	Package State	Last Modified Date	Last Modified By
Add or Modify Service Appointment Attendees	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed		
Approvals Workflow: Evaluate Approval Requests	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed		
Approvals Workflow: Process Approval Submission	Screen Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed		
Authentication Provider User Registration	Identity User Registration Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed		
Basic Approval Request	Flow Orchestration for CMS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed		
Billing Amount Flow	Autolaunched Flow	<input type="checkbox"/>	<input type="checkbox"/>	Unmanaged	Priya Dharshini	9/13/2025, 4:09 AM
Book Appointment from Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed		
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed		
Change Case Owner to Incident Owner	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed		
Chats Routed to Agents and Queues	Omni-Channel Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed		
Chats Routed to Agents with the Right Skills	Omni-Channel Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed		
Check Flow API Name	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed		

https://orgfarm-5aea6b3b4a-dev-ed.lightning.force.com/builder_platform_interaction/flowBuilder.app

New Automation

Get Started with Automations
Select a category, flow type, use search, or let Einstein build an automation for you.

Categories

- Triggered**: Automations launched by records and events. This type of automation runs without user interaction.
[View All >](#)
- Scheduled**: Time-based automations that launch at a specific time or frequency. This type of automation runs without user interaction.
[View All >](#)
- Screen**: Interface-driven automations that guide users through business processes. This type of automation collects or displays...
[View All >](#)
- Autolaunched**: Automations that automatically launch when invoked by APIs, templates, processes, conditions, or something else...
[View All >](#)

Frequently Used

- Record-Triggered Flow**: Launches when a record is created, updated, or deleted. This autolaunched flow runs in the background.
[Record-Triggered Flow](#)
- Screen Flow**: Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, an...
[Screen Flow](#)
- Schedule-Triggered Flow**: Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the...
[Schedule-Triggered Flow](#)
- Autolaunched Flow (No Trigger)**: Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the...
[Autolaunched Flow \(No Trigger\)](#)

[Flow Builder](#)

Record-Triggered Flow Start

Object: Billing details and feedback [Edit](#)
Trigger: A record is created or updated
Optimize for: Actions and Related Records

+ Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Billing ...

Run Immediately

End

Configure Start

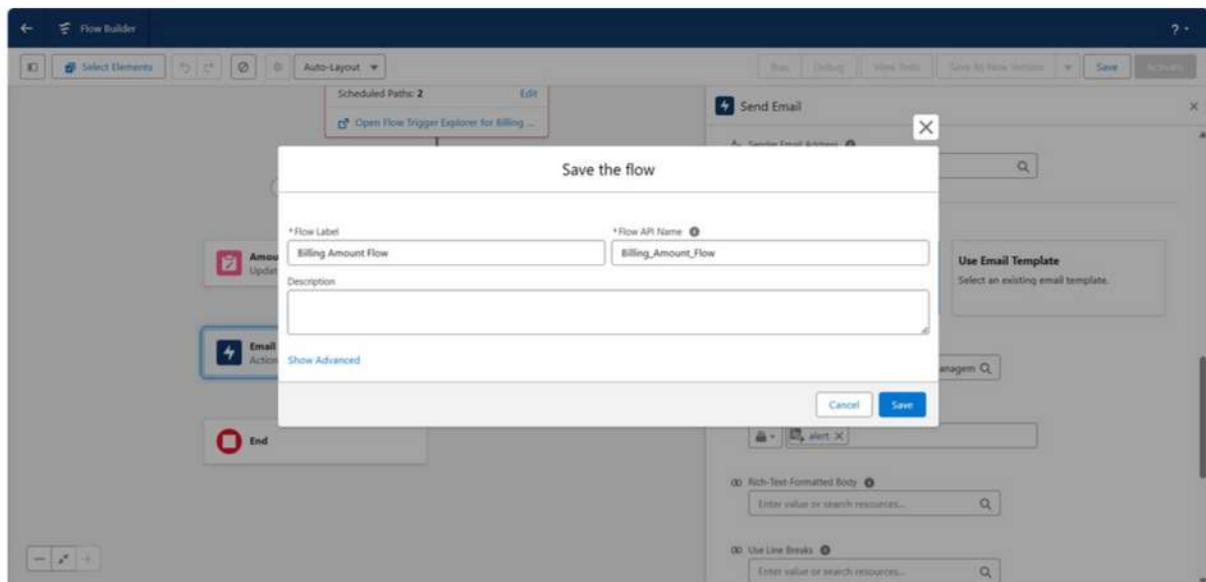
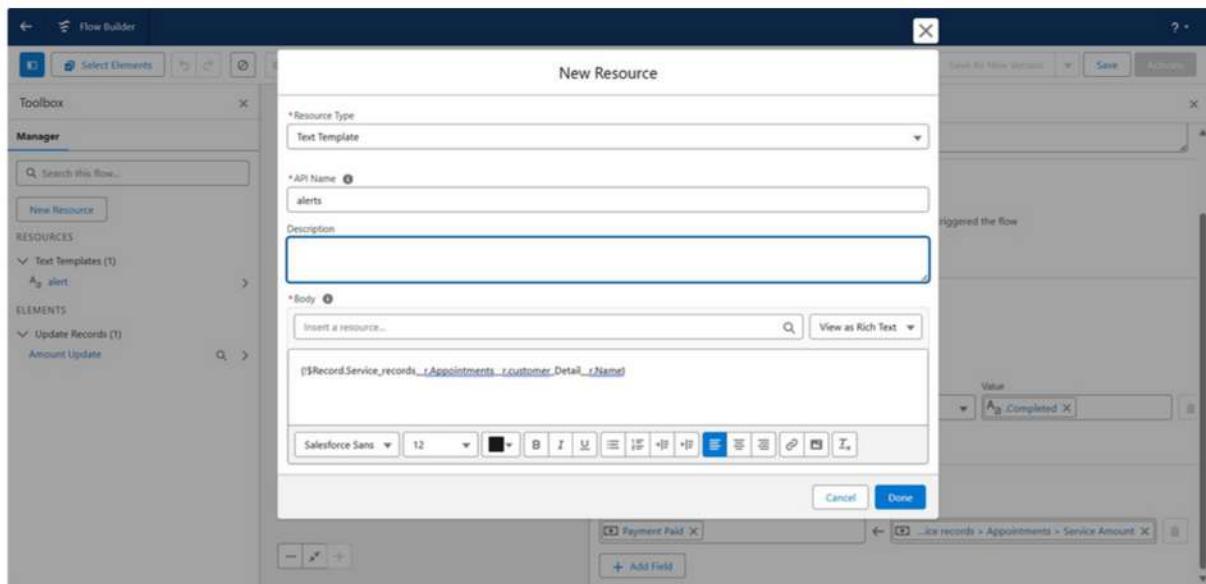
Set Entry Conditions
 Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.
 If you create a flow that's triggered when a record is updated, we recommend first defining entry conditions. Then select the **Only when a record is updated to meet the condition requirements** option for When to Run the Flow for Updated Records.

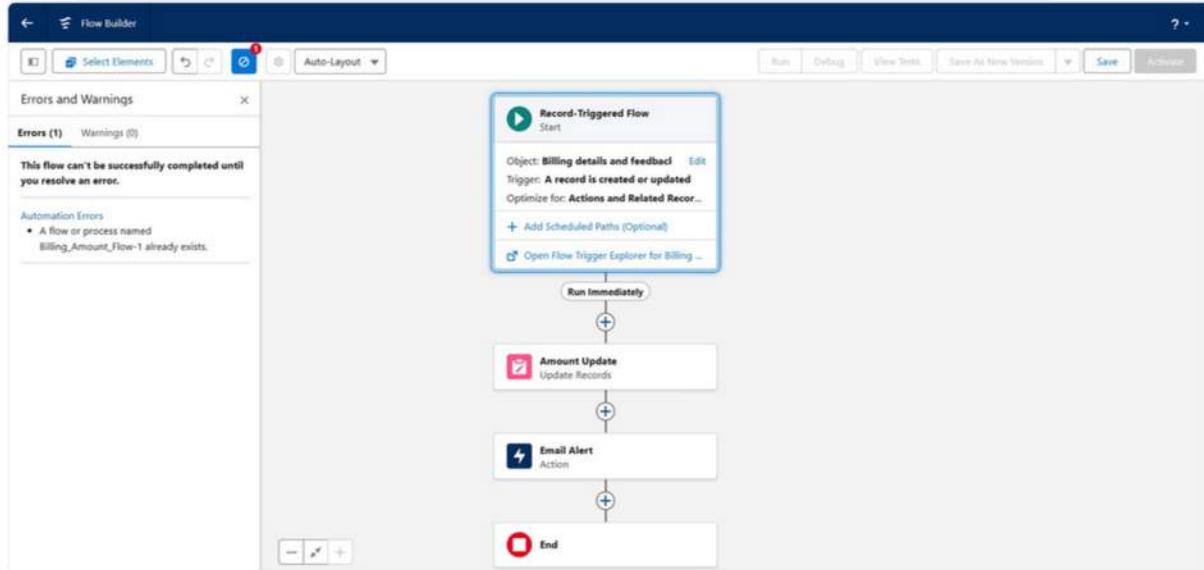
Condition Requirements: None

Optimize Flow
Optimize the Flow for:

- Fast Field Updates**: Update fields on the record that triggers the flow to run. This high-performance flow runs **before the record is saved** to the database.
- Actions and Related Records**: Update any record and perform actions, like send an email. This more flexible flow runs **after the record is saved** to the database.

Is this flow making an external callout or connecting to an external system?
 An asynchronous path is required for flows that involve external systems.
 Add Asynchronous Path





ii) Create another Flow

Search Setup

SETUP Flows

Flow Definitions

All Flows

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Approvals Workflow: Evaluate Approval Requests	Screen Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
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Basic Approval Request	Flow Orchestration for CMS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Billing Amount Flow	Autolaunched Flow	<input type="checkbox"/>	<input type="checkbox"/>	Unmanaged	Priya Dharshini	9/13/2025, 4:09 AM	
Book Appointment from Invitation	Salesforce Scheduler Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Cancel Item Flow	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Change Case Owner to Incident Owner	Screen Flow	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Chats Routed to Agents and Queue	Omni-Channel Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Chats Routed to Agents with the Right Skills	Omni-Channel Flow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Managed-Installed			
Check Flow API Name	Autolaunched Flow	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Managed-Installed			

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[View All >](#)
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Automations that automatically launch when invoked by APIs, templates, processes, conditions, or something else...
[View All >](#)

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Launches when a Record-Triggered Flow updated, or deleted. This autolaunched flow runs in the background.
- Screen Flow**
Guides users through a business process that's launched from Lightning pages, Experience Cloud sites, quick actions, an...
- Schedule-Triggered Flow**
Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the...
- Autolaunched Flow (No Trigger)**
Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the...

[View All >](#)

[Search automations...](#)

Save the flow

***Flow Label**
Update Service Status

***Flow API Name** [?](#)
Update_Service_Status

Description

Show Advanced

All Conditions Are Met (AND) [▼](#)

[Cancel](#) [Save](#)

Flow Builder | Update Service Status - V1

Last saved on 9/13/2025, 06:09 PM **Active** Run Debug View Tests Save As New Version Save Deactivate

Record-Triggered Flow

Object: Service records Edit
Trigger: A record is created or updated
Optimize for: Actions and Related Records...
Add Scheduled Paths (Optional)
Open Flow Trigger Explorer for Service...

Run Immediately

Update Service Update Records

End

Update Records

* Label: Update Service * API Name: Update_Service

Description:

* How to Find Records to Update and Set Their Values
 Use the service records record that triggered the flow
 Update records related to the service records record that triggered the flow
 Use the IDs and all field values from a record or record collection
 Specify conditions to identify records, and set fields individually

Set Filter Conditions

Condition Requirements to Update Record: All Conditions Are Met (AND)

Field	Operator	Value
Quality Check Status	Equals	True

+ Add Condition

Set Field Values for the Service records Record

Milestone 14: Apex trigger

i) Apex handler

New Apex Class Apex Trigger

```

trigger Handler {
    list<Appointments__c> listApp;
    Service_records__c serList = new list <Service_records__c>();
    Appointments__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;
    }
}

```

Logs Tests Checkpoints Query Editor View State Progress Problems

New Apex Trigger

Name:

sObject:

```
File Edit Debug Test Workspace Help < >
AmountDistributionHandler.apxc * AmountDistribution.apxt *
Code Coverage: None API Version: 64
1 * public class AmountDistributionHandler {
2
3
4
5 *     public static void amountDist(list<Appointments__c> listApp){
6
7     list<Service_records__c> serList = new list <Service_records__c>();
8
9
10    for(Appointments__c app : listApp){
11
12        if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){
13
14            app.Service_Amount__c = 10000;
15
16        }
17
18        else if(app.Maintenance service __c == true && app.Repairs __c == true){
19
20            app.Service_Amount__c = 5000;
21
22        }
23
24        else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
25
26            app.Service_Amount__c = 8000;
27
28        }
29
30        else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
31
32            app.Service_Amount__c = 7000;
33
34        }
35
36        else if(app.Maintenance service __c == true){
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```

The screenshot shows the Salesforce IDE interface. The main area displays an Apex class with the following code:

```
37 *     else if(app.Maintenance_service__c == true){
38 *         app.Service_Amount__c = 2000;
39 *
40 *     }
41 *
42 *     else if(app.Repairs__c == true){
43 *         app.Service_Amount__c = 3000;
44 *
45 *     }
46 *
47 *     else if(app.Replacement_Parts__c == true){
48 *         app.Service_Amount__c = 5000;
49 *
50 *     }
51 *
52 * }
```

The code editor has line numbers from 37 to 55. The tabs at the bottom are 'Logs', 'Tests', 'Checkpoints', 'Query Editor', 'View State', 'Progress', and 'Problems'. The 'Problems' tab is highlighted.

The screenshot shows the Salesforce IDE interface. The main area displays a trigger definition in the `AmountDistributionHandler.apxc` file:

```
1 * trigger AmountDistribution on Appointments__c (before insert, before update) {
2 *     if (Trigger.isBefore && (Trigger.isInsert || Trigger.isUpdate)) {
3 *         AmountDistributionHandler.amountDist(Trigger.new);
4 *     }
5 * }
```

The code editor has line numbers from 1 to 6. The tabs at the bottom are 'File', 'Edit', 'Debug', 'Test', 'Workspace', 'Help', '<', and '>'. The file tab shows `AmountDistributionHandler.apxc` and the trigger tab shows `AmountDistribution.apxt`. The tabs at the top are 'Code Coverage: None', 'API Version: 64', and other navigation icons.

CODE FOR APEX CLASS:

```
public class AmountDistributionHandler {  
  
    public static void amountDist(list<Appointments__c> listApp){  
  
        list<Service_records__c> serList = new list <Service_records__c>();  
  
        for(Appointments__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;

    }

}
```

C O D E F O R A P E X T R I G G E R :

```
trigger AmountDistribution on Appointments__c (before insert, before update) {

if (Trigger.isBefore && (Trigger.isInsert || Trigger.isUpdate)) {

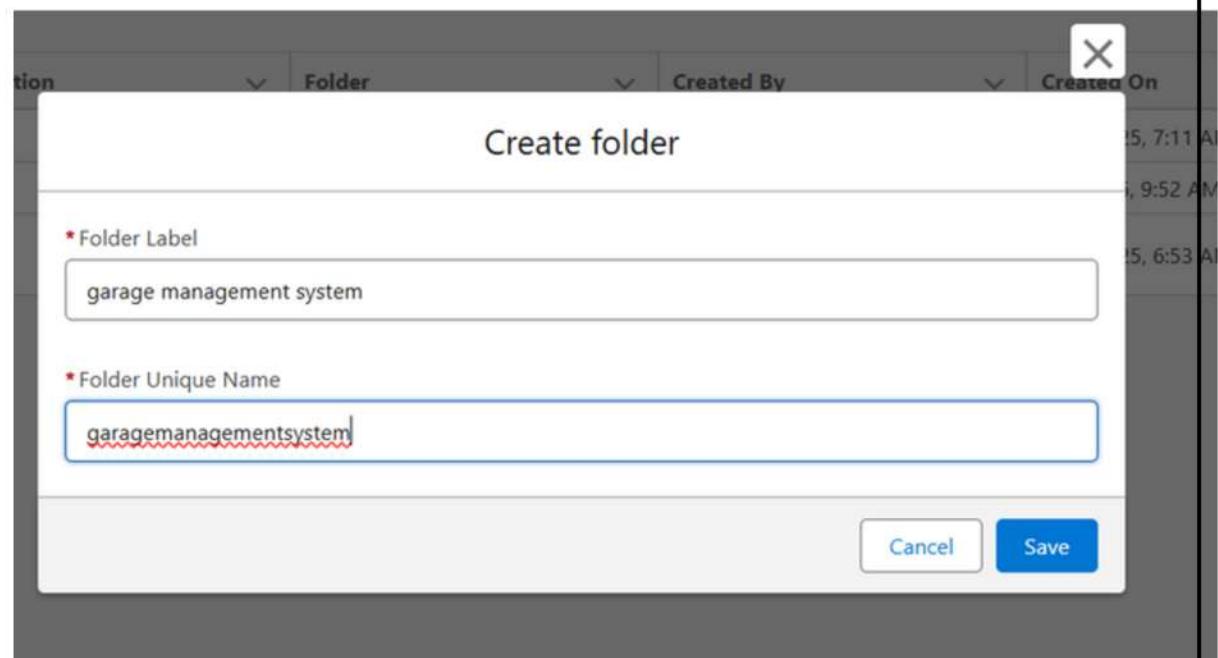
    AmountDistributionHandler.amountDist(Trigger.new);

}

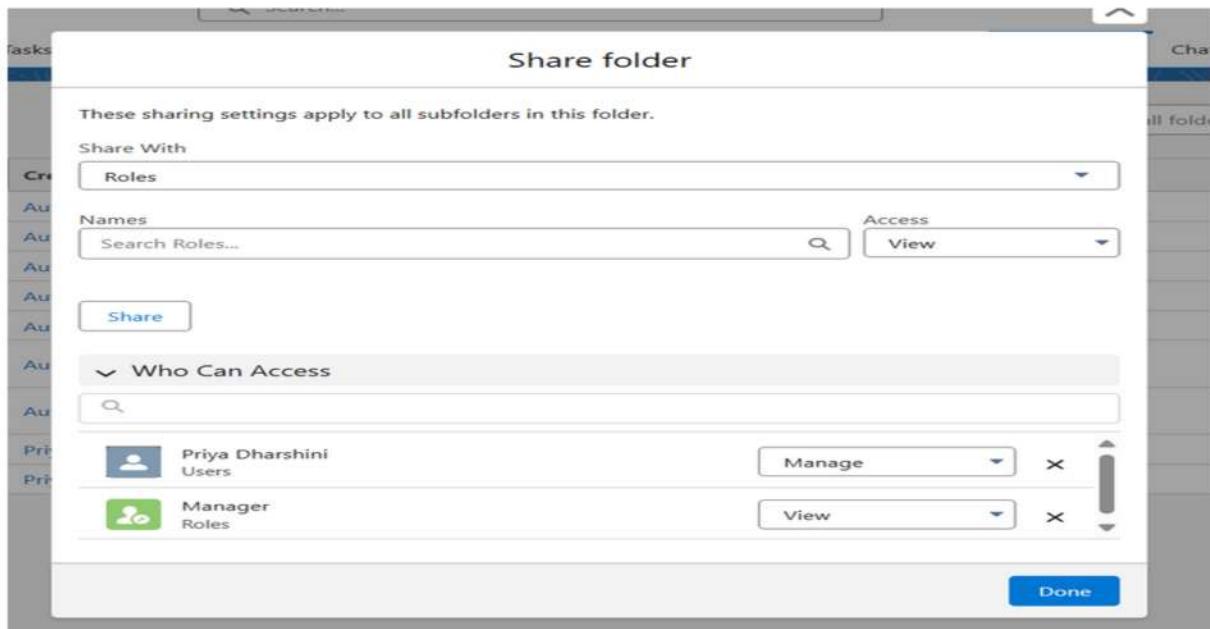
}
```

Milestone 15: Reports

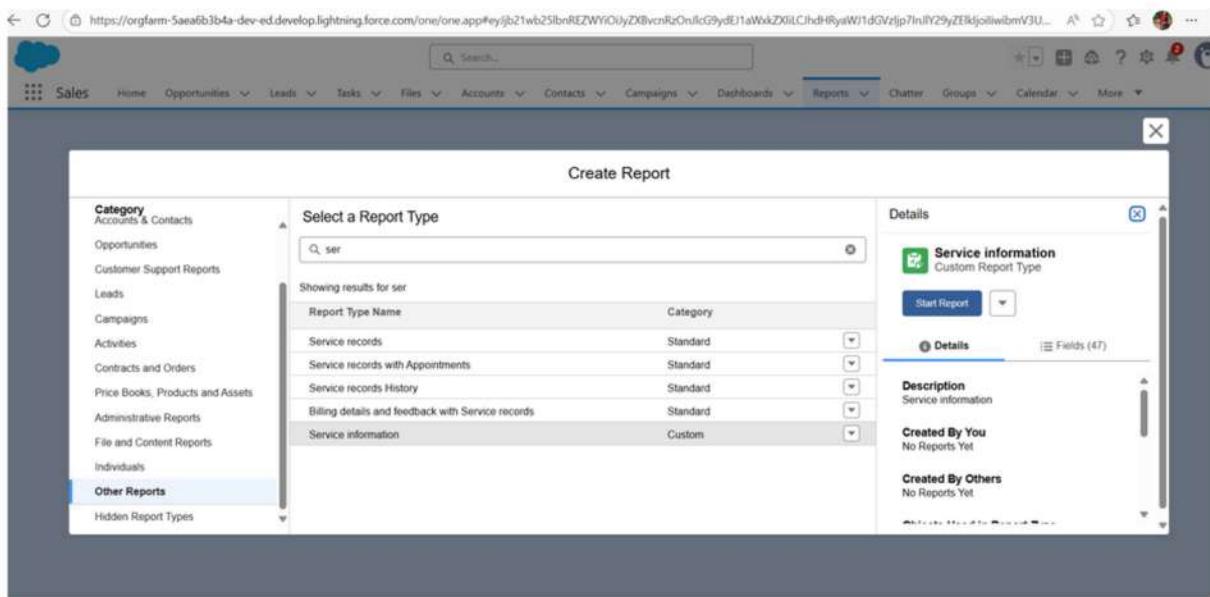
i)create a report folder



ii) Sharing a report folder



iii) Create report type



iv) Create report

Details

Display Label	Service information
API Name	Service_information
Description	Service information
Created By	Priya Dharshini, 08/09/25, 10:03 pm
Store in Cate...	other
Deployment ...	Deployed
Modified By	Priya Dharshini, 08/09/25, 10:03 pm

Object Relationships

customer Detail (A)

- with at least one related record from Appointments (B)
- with at least one related record from Service records (C)
- with at least one related record from Billing details and feedback (D)

Fields

Source Object	Included Fields
customer Detail	10
Appointments	14
Service records	12
Billing details and feedback	11

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar More

REPORT New Service information Report Service information

Previews a limited number of records. Run the report to see everything.

customer Detail Name Appointments Name Service records Name Billing details and feedback Name

No records returned in preview. Try running the report or editing report filters.

- Show All customer detail
- Set the Created Date filter to All Time
- Edit other filters in the filter panel

Outline Filters ?

Groups ?

GROUP ROWS Add group... Q

Columns ?

Add column... Q

customer Detail Name X

Appointments Name X

Service records Name X

Billing details and feedback Name X

Update Preview Automatically

Add Chart Save & Run Save Close Run

Sales Home Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar More

REPORT New Service information Report Service information

Previews a limited number of records. Run the report to see everything.

Rating for service Payment Status Completed Total

	Rating for service	Payment Status	Completed	Total
3	Sum of Payment Paid Record Count	\$300	\$300	1 1
4	Sum of Payment Paid Record Count	\$1,038	\$1,038	2 2
5	Sum of Payment Paid Record Count	\$963	\$963	2 2
Total	Sum of Payment Paid Record Count	\$2,301	\$2,301	5 5

Sum of Payment

Rating for service

Details (5 Rows) Click an intersection in the table above to filter details.

customer Detail Name	Appointment Date	Service Status	Payment Paid
Priya	9/10/2025	Completed	\$300
Priya	9/10/2025	Completed	\$452
Priya	9/10/2025	Completed	\$566
Priya	9/10/2025	Completed	\$463
Priya	9/10/2025	Completed	\$500

Row Counts Detail Rows Grand Total Stacked Summaries Conditional Formatting

To Do List

Opportunities Leads Tasks Files Accounts Contacts Campaigns Dashboards Reports Chatter Groups Calendar

Report Service information

Save Report As

* Report Name: New Service information Report

Report Unique Name: New_Service_Information_Report_MRC

Report Description:

Folder: Garage Management Folder

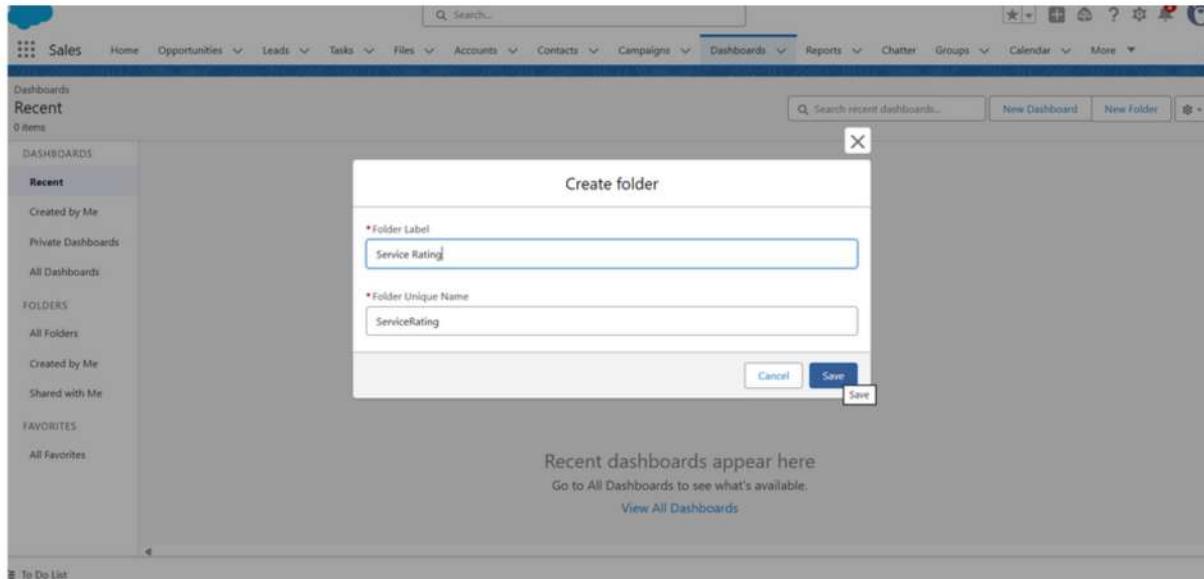
Cancel Save

Customer Detail Name Appointment Date Service Status Payment Paid

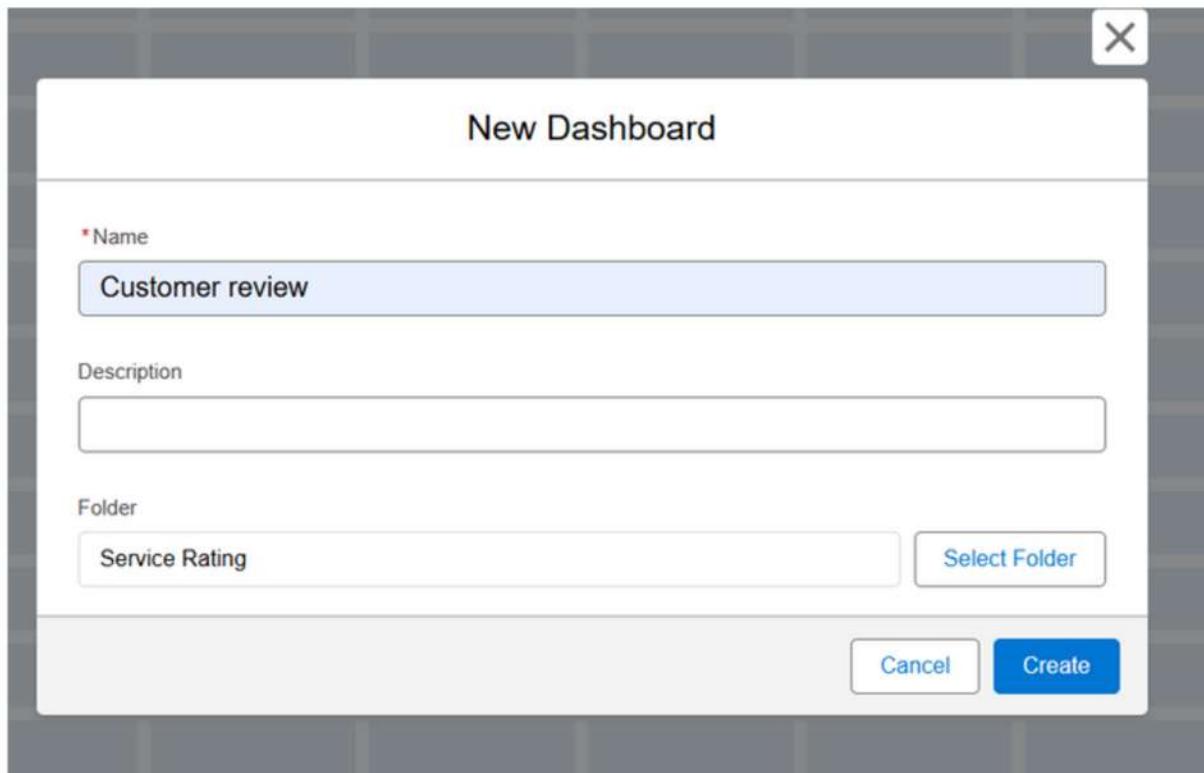
Priya	9/10/2025	Completed	\$300
Priya	9/10/2025	Completed	\$452
Priya	9/10/2025	Completed	\$566
Priya	9/10/2025	Completed	\$463
Priya	9/10/2025	Completed	\$500

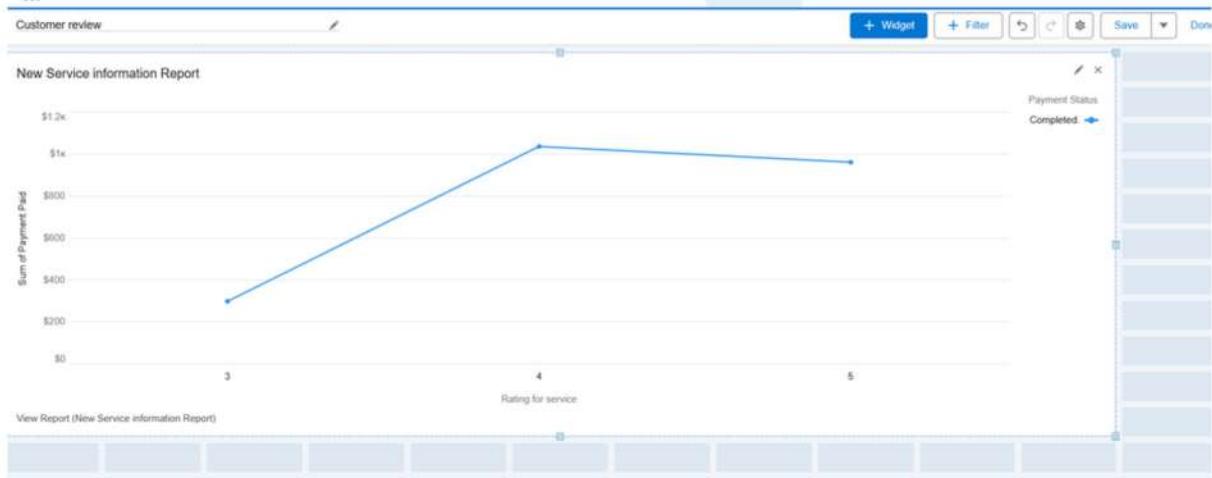
Milestone 16: Dashboards

i) Create Dashboard Folder



ii) Create Dashboard





Schedule dashboard refreshes and subscribe to receive results.

Settings

Frequency: Daily Weekly Monthly

Days: Sun Mon Tue Wed Thu Fri Sat

Time: 3:00 PM

Recipients

⚠ Recipients see the same report data as the person running the report.

Receive new results by email when dashboard is refreshed. ⓘ

Send email to
Me

[Edit Recipients](#)

[Cancel](#) [Save](#)

Milestone 17: User Adoption

i)creating records

The screenshot shows the 'Customer Detail' view for a customer named 'mac'. The 'Details' tab is selected, displaying the following information:

- Customer Detail Name: mac
- Phone: (567) 876-5567
- Gmail: mac@gmail.com
- Created By: Priya Dharshini, 9/10/2025, 9:26 AM
- Last Modified By: Priya Dharshini, 9/10/2025, 9:26 AM

The 'Activity' section on the right shows a grid of icons for different types of activities. A message bar at the top of the activity pane says "No activities to show. Get started by sending an email, scheduling a task, and more." Below it, another message says "No past activity. Past meetings and tasks marked as done show up here."

The screenshot shows the 'Appointments' view for an appointment named '#001'. The 'Details' tab is selected, displaying the following information:

- Appointments Name: Appointment #001
- Customer Detail: mac
- Maintenance service: Repairs
- Repairs: Replacement Parts
- Appointment Date: 9/10/2025
- Service Amount: \$500
- Vehicle number plate: TS30EU0443
- Created By: Priya Dharshini, 9/10/2025, 9:31 AM
- Last Modified By: Priya Dharshini, 9/10/2025, 9:31 AM

The 'Activity' section on the right is identical to the one in the customer detail view, showing a grid of activity icons and messages about no past activity.

New Service records

* = Required Information

Information

* Service records Name ser-109	Owner Priya Dharshini
Appointments Appointment #001	
Quality Check Status <input checked="" type="checkbox"/>	
Service Status Started	

Buttons: Cancel, Save & New, Save

Garage Management System

Service records ser-109

Details

Service records Name ser-109	Owner Priya Dharshini
Appointments Appointment #001	
Quality Check Status <input checked="" type="checkbox"/>	
Service Status Completed.	
service date 9/10/2025	
service date 9/10/2025	
Created By Priya Dharshini, 9/10/2025, 9:36 AM	Last Modified By Priya Dharshini, 9/10/2025, 9:37 AM

Advantages:

- Centralized customer and service data.**
 - Automated reminders and workflows.**
 - Real-time reporting and analytics.**
 - Scalable for growing businesses.**
 - Mobile access and system integration.**
 - Better customer communication.**
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Disadvantages:

- High setup and licensing costs.**
 - Requires technical setup and training.**
 - May be too complex for small garages.**
 - Needs reliable internet connection.**
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Conclusion:

Salesforce-based Garage Management Systems offer powerful tools for automation and growth, ideal for medium to large garages. However, small garages may find it too costly or complex for their needs.

