

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

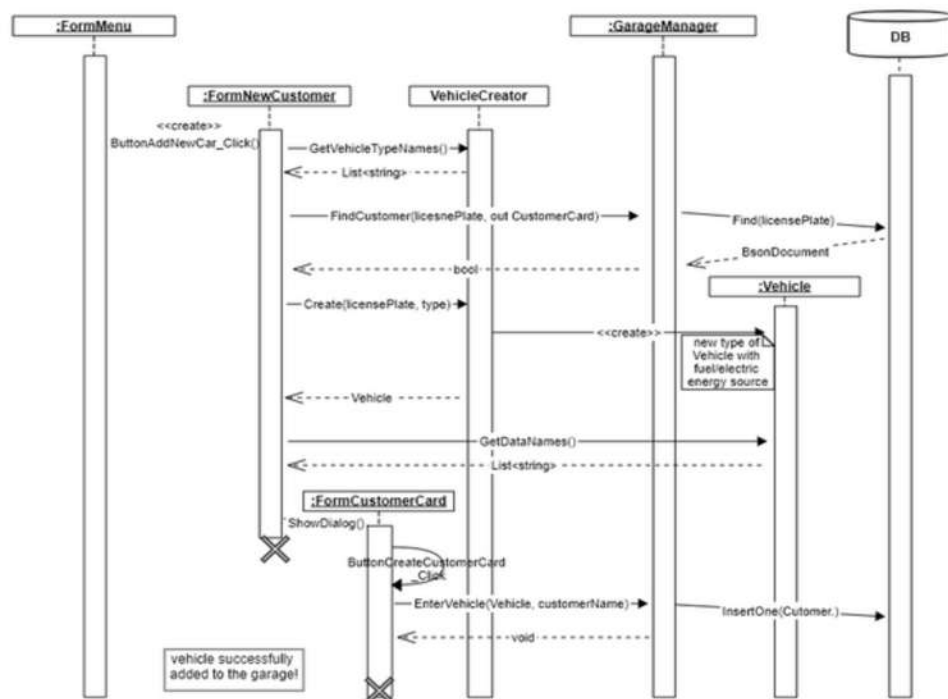
Team Member3: K.Kathiravan

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 :

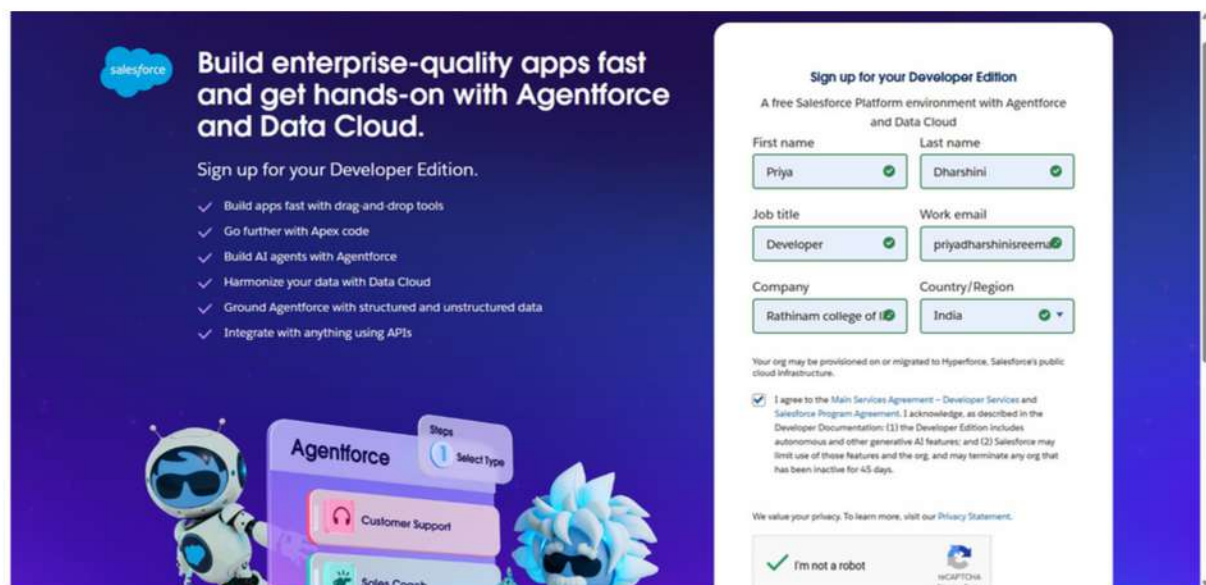
The **purpose of garage management** is to ensure the **efficient, safe, and cost-effective operation** of a garage—whether it's an automotive repair shop, service center, or fleet maintenance facility. It involves organizing and overseeing all aspects of the garage's operations to deliver high-quality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

Milestone 1: Salesforce

i) Creating Developer Account:

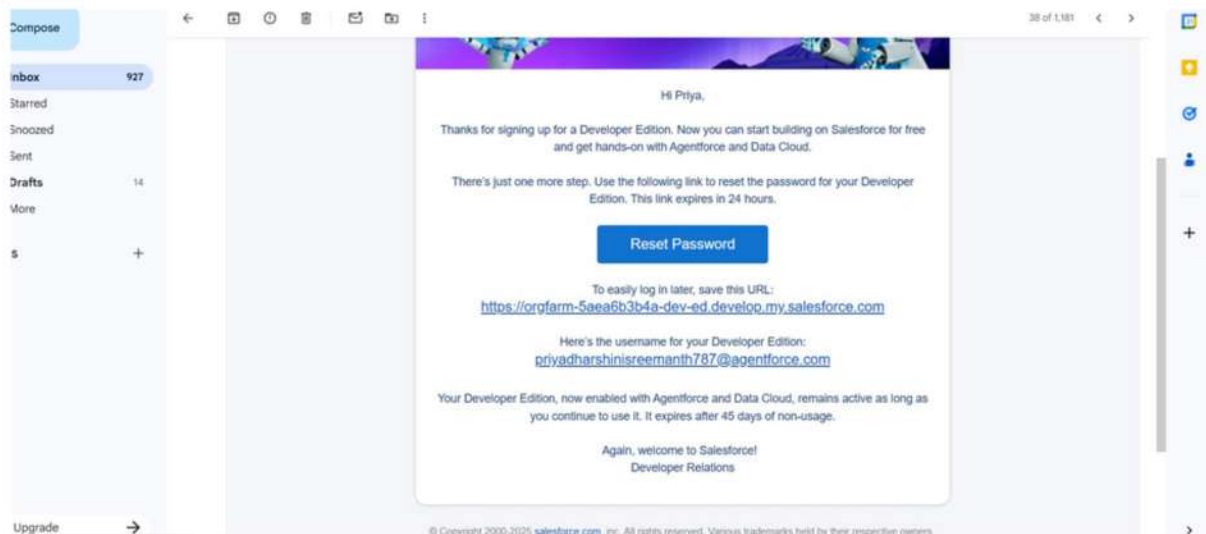
Using this URL-

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



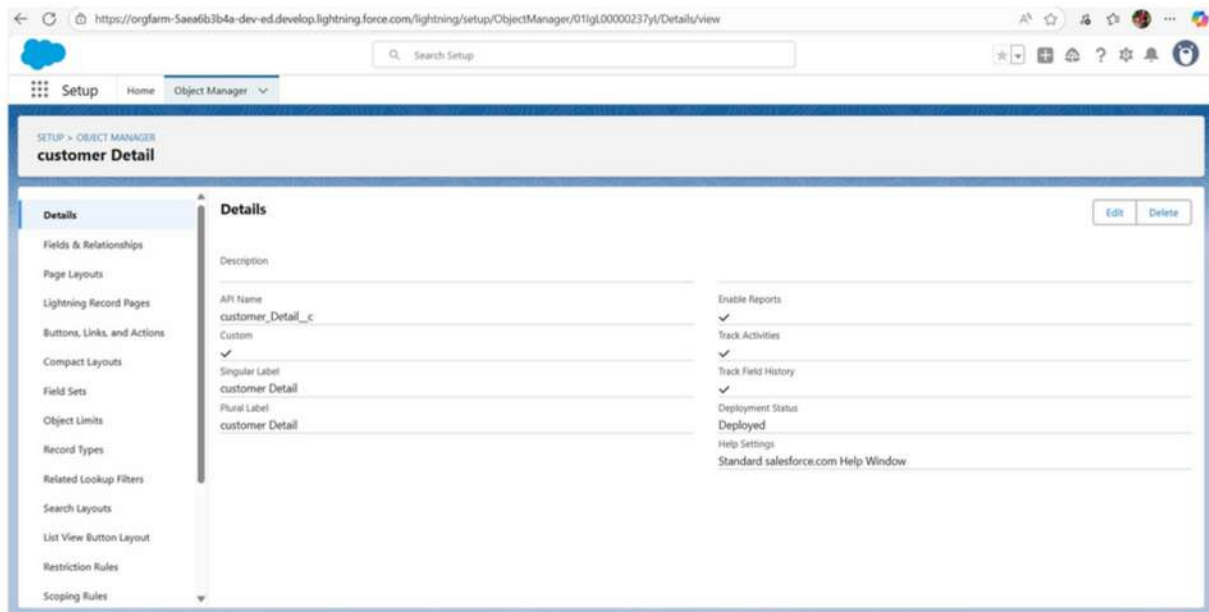
The screenshot shows the Salesforce Developer Edition sign-up page. On the left, there's a blue banner with the Salesforce logo and text: "Build enterprise-quality apps fast and get hands-on with Agentforce and Data Cloud." Below this, it says "Sign up for your Developer Edition." and lists five benefits: "Build apps fast with drag-and-drop tools", "Go further with Apex code", "Build AI agents with Agentforce", "Harmonize your data with Data Cloud", and "Ground Agentforce with structured and unstructured data". At the bottom of the banner are illustrations of Agentforce and Data Cloud. On the right, there's a white sign-up form titled "Sign up for your Developer Edition". It includes fields for "First name" (Priya), "Last name" (Dharshini), "Job title" (Developer), "Work email" (priyadharshinisreema@gmail.com), "Company" (Rathinam college of technology), and "Country/Region" (India). Below the form, there's a checkbox for "I agree to the Main Services Agreement - Developer Services and Salesforce Program Agreement" and a "We value your privacy" link. At the bottom, there's a "I'm not a robot" checkbox and a CAPTCHA image.

ii) Account Activation



Milestone 2: Object

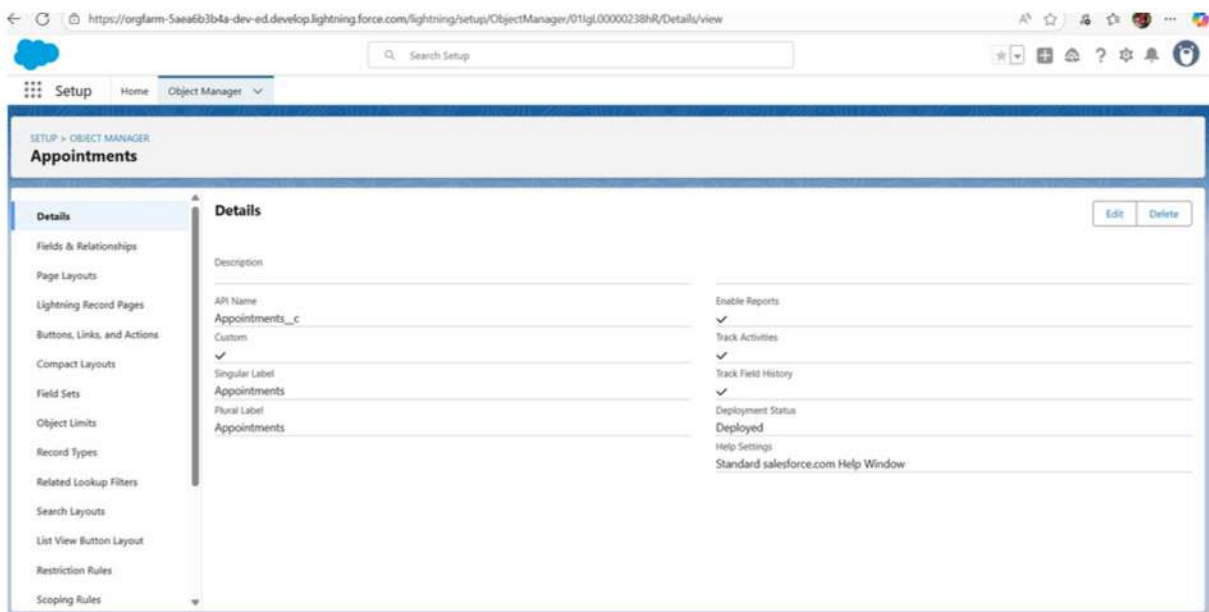
i)Creating customer detail:



The screenshot shows the Salesforce Setup interface for the 'customer Detail' object. The left sidebar contains a navigation menu with options: Details, 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 content area is titled 'customer Detail' and includes an 'Edit' button and a 'Delete' button. The 'Details' section is expanded, showing the following fields:

Field	Value
Description	
API Name	customer_Detail__c
Custom	<input checked="" type="checkbox"/>
Singular Label	customer Detail
Plural Label	customer Detail
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	<input checked="" type="checkbox"/>
Track Field History	<input checked="" type="checkbox"/>
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

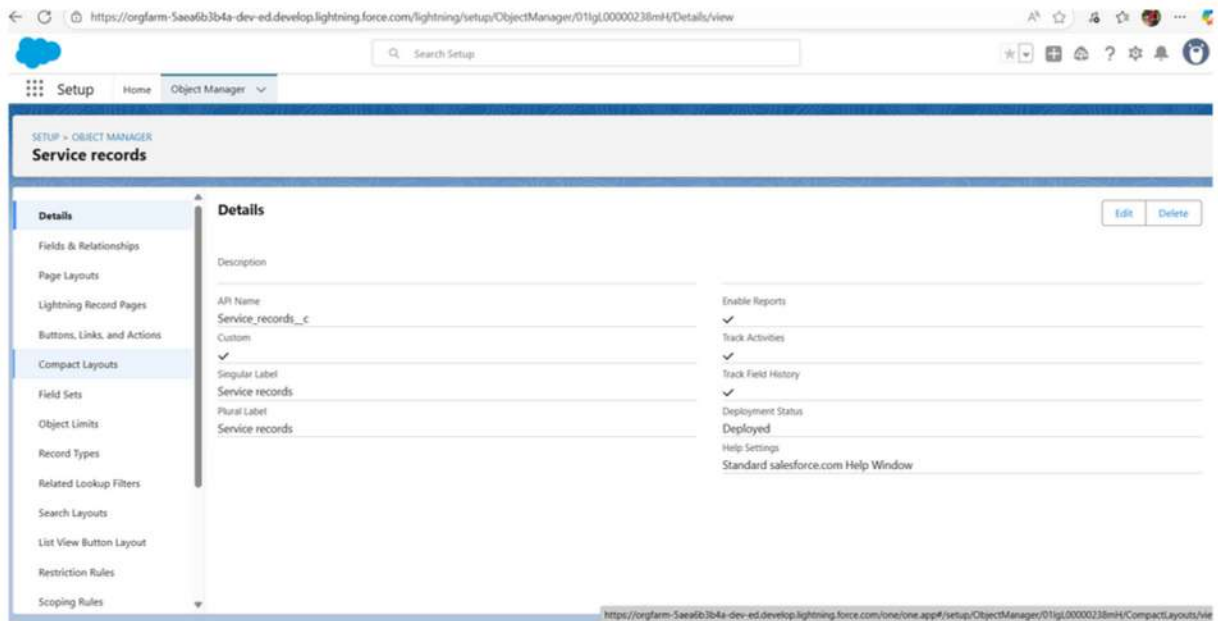
ii)Creating Appointments:



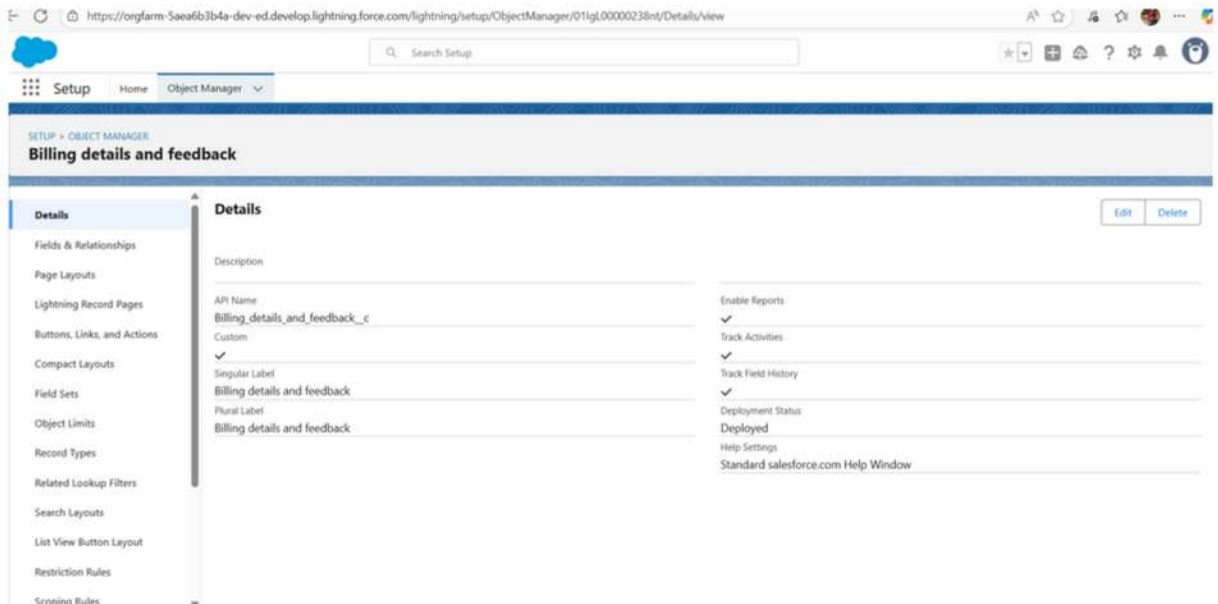
The screenshot shows the Salesforce Setup interface for the 'Appointments' object. The left sidebar contains a navigation menu with options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main content area is titled 'Appointments' and includes an 'Edit' button and a 'Delete' button. The 'Details' section is expanded, showing the following fields:

Field	Value
Description	
API Name	Appointments__c
Custom	<input checked="" type="checkbox"/>
Singular Label	Appointments
Plural Label	Appointments
Enable Reports	<input checked="" type="checkbox"/>
Track Activities	<input checked="" type="checkbox"/>
Track Field History	<input checked="" type="checkbox"/>
Deployment Status	Deployed
Help Settings	Standard salesforce.com Help Window

iii)Creating service records:



iv) Creating Billing details and feedback:



Milestone 3: Tabs

i)Creating custom tabs:

The screenshot shows the Salesforce Setup interface for creating a custom tab. The breadcrumb trail is: SETUP > OBJECT MANAGER > Appointments. The left sidebar lists various configuration options under 'Details' and 'Fields & Relationships'. The main content area is titled 'Data Type' and shows a list of available data types for the 'Appointments' object. The 'None Selected' option is currently chosen.

Data Type	Description
<input type="radio"/> None Selected	Select one of the data types below
<input type="radio"/> Auto Number	A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
<input type="radio"/> Formula	A read-only field that derives its value from a formula expression you define. The formula field is updated when any of the source fields change.
<input type="radio"/> Roll-Up Summary	A read-only field that displays the sum, minimum, or maximum value of a field in a related list or the record count of all records listed in a related list.
<input type="radio"/> Lookup Relationship	Creates a relationship that links this object to another object. The relationship field allows users to click on a lookup icon to select a value from a popup list. The other object is the source of the values in the list.
<input type="radio"/> Master-Detail Relationship	Creates a special type of parent-child relationship between this object (the child, or "detail") and another object (the parent, or "master") where: <ul style="list-style-type: none">The relationship field is required on all detail records.The ownership and sharing of a detail record are determined by the master record.When a user deletes the master record, all detail records are deleted.You can create rollup summary fields on the master record to summarize the detail records. The relationship field allows users to click on a lookup icon to select a value from a popup list. The master object is the source of the values in the list.
<input type="radio"/> External Lookup Relationship	Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
<input checked="" type="radio"/> Checkbox	Allows users to select a True (checked) or False (unchecked) value.
<input type="radio"/> Currency	Allows users to enter a dollar or other currency amount and automatically formats the field as a currency amount. This can be useful if you export data to Excel or another spreadsheet.
<input type="radio"/> Date	Allows users to enter a date or pick a date from a popup calendar.
<input type="radio"/> Date/Time	Allows users to enter a date and time, or pick a date from a popup calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
<input type="radio"/> Email	Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking the Send Email button.

The screenshot shows the 'New Custom Field' wizard for the 'Appointments' object, specifically 'Step 2: Enter the details'. The left sidebar is the same as the previous screenshot. The main content area shows the configuration for a new checkbox field named 'Maintenance service'.

Step 2: Enter the details (Step 2 of 4)

Field Label: Maintenance service

Default Value: ☒ Checked ☐ Unchecked

Field Name: Maintenance_service

Description:

Help Text:

Auto add to custom report type: ☒ Add this field to existing custom report types that contain this entity

ii)Creating Remaining Tabs

https://orgfarm-Saaa6b3b4a-dev-ed.develop.lightning.force.com/lightning/setup/CustomTabs/page?address=%2Fsetup%2Fu%2Fcustomtabs.jsp%3Fsetupid%3DCustomTabs%26retURL%... A

Search Setup

Setup Home Object Manager

Q tabs

User Interface

Rename Tabs and Labels

Tabs

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

SETUP Tabs

Experience and the mobile app.

Custom Object Tabs

New What Is This?

Action	Label	Tab Style	Description
Edit Del	Appointments	Blank	
Edit Del	Billing details and feedback	Blank	
Edit Del	customer Detail	Blank	
Edit Del	Service records	Card	

Web Tabs

New What Is This?

No Web Tabs have been defined

Visualforce Tabs

New What Is This?

No Visualforce Tabs have been defined

Lightning Component Tabs

New What Is This?

No Lightning component tabs have been defined

Lightning Page Tabs

New What Is This?

No Lightning Page Tabs have been defined

Milestone 4: The lightning app

i)Creating lightning app

Search Setup

Setup Home Object Manager

Q app man

Apps

App Manager

External Client Apps

External Client App Manager

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

SETUP Lightning Experience App Manager

New Lightning App New External Client App

New Lightning App

27 items • Sorted by App Name • Filtered by All appnames - TabSet Type, App Type

App Name	Developer Name	Description	Last Modified	App Type	Visible
1 All Tabs	AllTabSet		9/1/2025, 9:07 PM	Classic	
2 Analytics Studio	Insights	Build CRM Analytics dashboards and apps	9/1/2025, 9:07 PM	Classic	✓
3 App Launcher	AppLauncher	App Launcher tabs	9/1/2025, 9:07 PM	Classic	✓
4 Approvals	Approvals	Manage approvals and approval flows	9/1/2025, 9:07 PM	Lightning	✓
5 Automation	FlowsApp	Automate business processes and repetitive tasks.	9/1/2025, 9:13 PM	Lightning	✓
6 Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	9/1/2025, 9:07 PM	Lightning	✓
7 Community	Community	Salesforce CRM Communities	9/1/2025, 9:07 PM	Classic	✓
8 Content	Content	Salesforce CRM Content	9/1/2025, 9:07 PM	Classic	✓
9 Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	9/1/2025, 9:07 PM	Lightning	✓
10 Data Manager	DataManager	Use Data Manager to view limits, monitor usage, and manage recipes.	9/1/2025, 9:07 PM	Lightning	✓
11 Digital Experiences	SalesforceCMS	Manage content and media for all of your sites.	9/1/2025, 9:07 PM	Lightning	✓
12 Garage Management Application	Garage_Management_Application		9/7/2025, 9:38 A...	Lightning	✓
13 Lightning Usage App	LightningInstrumentation	View Adoption and Usage Metrics for Lightning Experience	9/1/2025, 9:07 PM	Lightning	✓
14 Marketing CRM Classic	Marketing	Track sales and marketing efforts with CRM objects.	9/1/2025, 9:07 PM	Classic	✓

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 ⓘ

Garage Management Application

* Developer Name ⓘ

Garage_Management_Application

Description ⓘ

Enter a description...

App Branding

Image ⓘ

Upload

Primary Color Hex Value ⓘ

#0070C2

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	8/7/2025, 9:38 A...	Lightning	✓
11	Lightning Usage App	LightningInstrumentation	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

dash

Selected Items

customer Detail

Appointments

Service records

Billing details and feedback

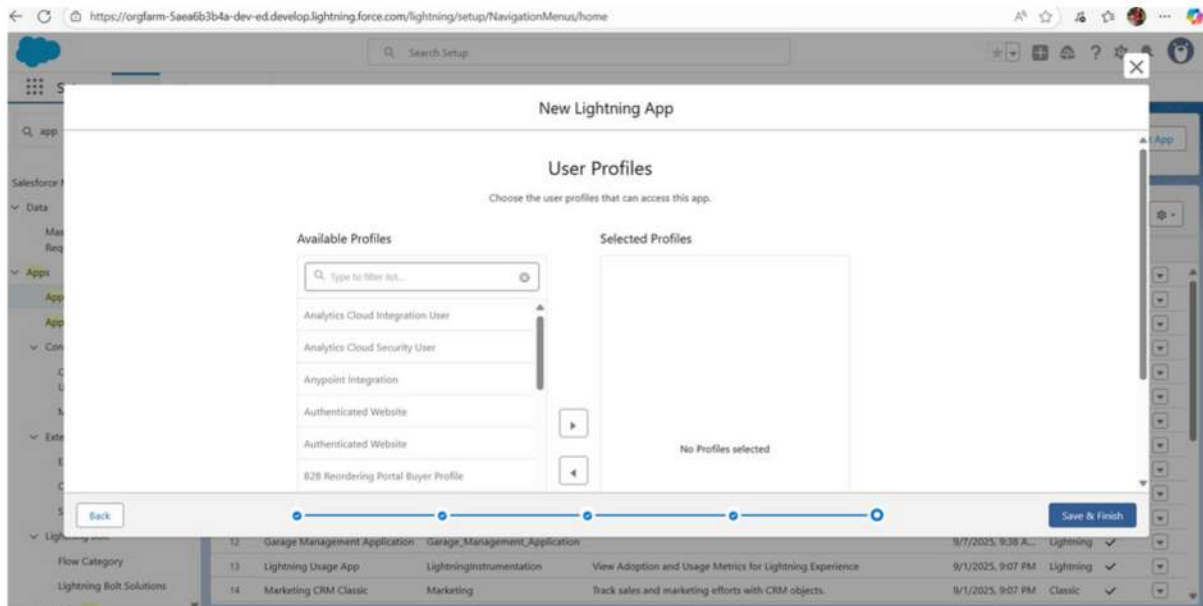
Reports

Dashboards

Back

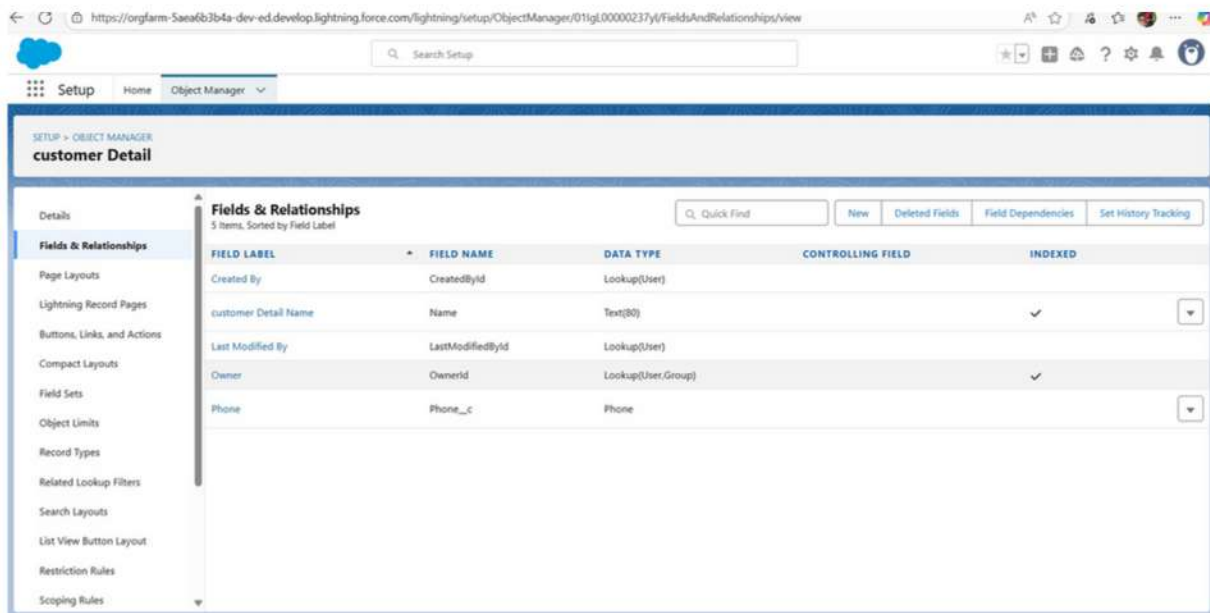
Next

12	Garage Management Application	Garage_Management_Application	8/7/2025, 9:38 A...	Lightning	✓
11	Lightning Usage App	LightningInstrumentation	9/1/2025, 9:07 PM	Lightning	✓

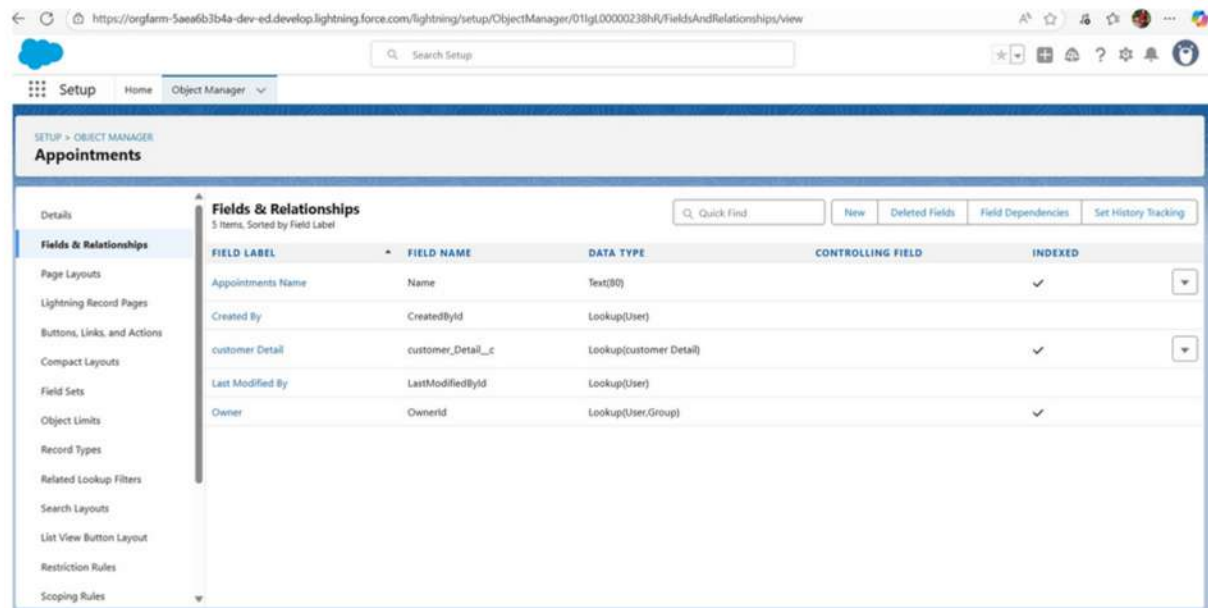


Milestone 5: Fields

i) Creation of fields for the Customer Details object



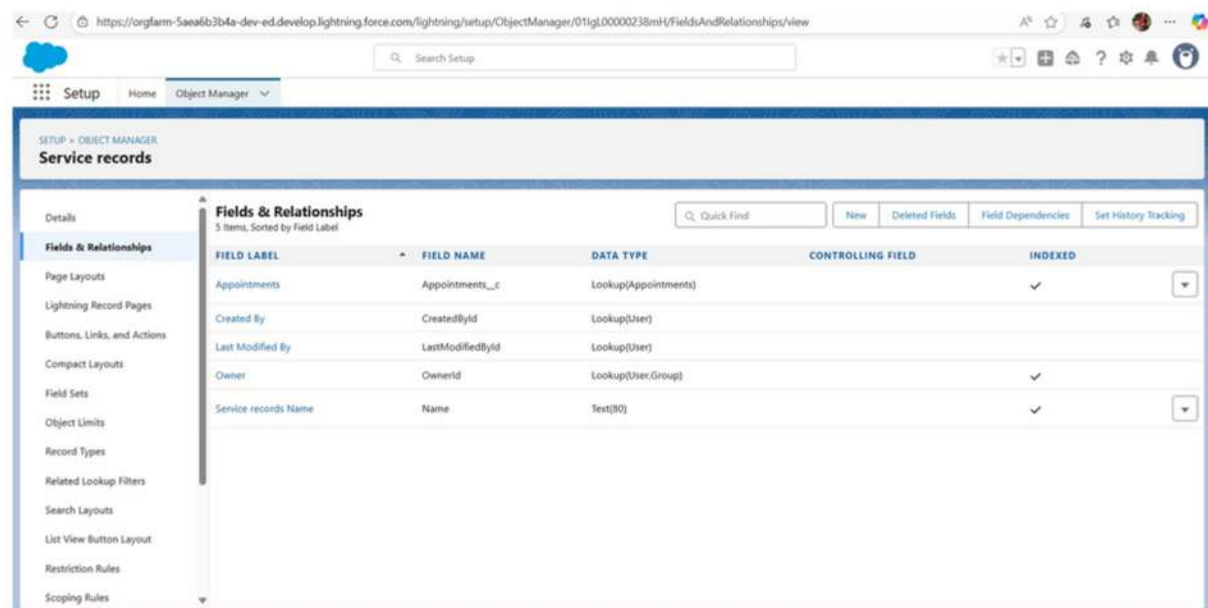
ii) Creation of Lookup Fields



The screenshot shows the Salesforce Setup interface for the 'Appointments' object. The 'Fields & Relationships' section is active, displaying a table of fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Appointments Name (Text(80)), Created By (Lookup(User)), customer Detail (Lookup(customer Detail)), Last Modified By (Lookup(User)), and Owner (Lookup(User,Group)).

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 Setup interface for the 'Service records' object. The 'Fields & Relationships' section is active, displaying a table of fields. The table has columns for Field Label, Field Name, Data Type, Controlling Field, and Indexed. The fields listed are: Appointments (Lookup(Appointments)), Created By (Lookup(User)), Last Modified By (Lookup(User)), Owner (Lookup(User,Group)), and Service records Name (Text(80)).

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

← ↻ 🔍 https://orgfarm-5aea6b3b4a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gl00000238nt/FieldsAndRelationships/view

Setup Home Object Manager ▾

SETUP > OBJECT MANAGER

Billing details and feedback

Details

Fields & Relationships
3 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

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)		✓

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
Scoping Rules

v) Creation of Currency Fields

← ↻ 🔍 https://orgfarm-5aea6b3b4a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gl00000238hR/FieldsAndRelationships/view

Setup Home Object Manager ▾

SETUP > OBJECT MANAGER

Appointments

Details

Fields & Relationships
7 Items, Sorted by Field Label

Q Quick Find New Deleted Fields Field Dependencies Set History Tracking

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		

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
Scoping Rules

vi) Creation of Text Fields

https://orgfarm-Saa6b3b4a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gl.00000238mH/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Service records

Details

Fields & Relationships
6 Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

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)		✓
Quality Check Status	Quality_Check_Status__c	Checkbox		
Service records Name	Name	Text(80)		✓

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
Scoping Rules

vii) Creating Formula Field in Service records Object

https://orgfarm-Saa6b3b4a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/011gl.00000238nt/FieldsAndRelationships/view

Setup Home Object Manager

SETUP > OBJECT MANAGER

Billing details and feedback

Details

Fields & Relationships
6 Items, Sorted by Field Label

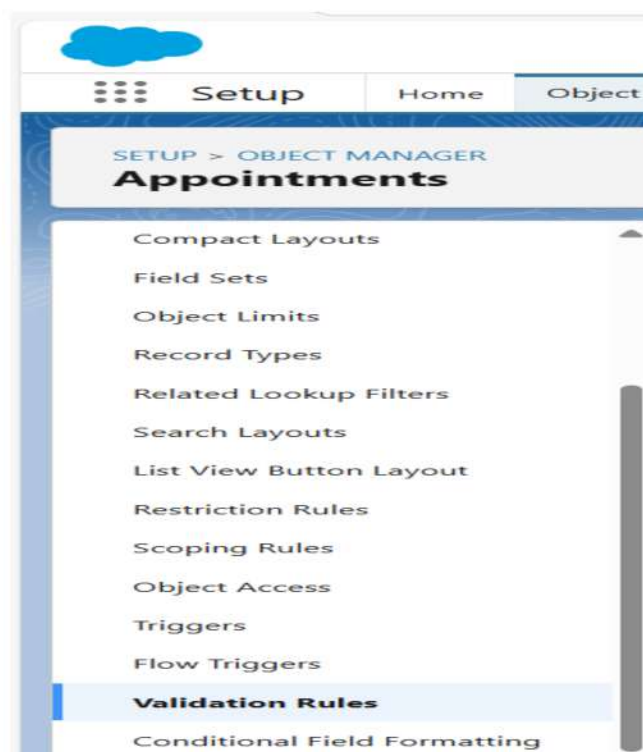
Quick Find New Deleted Fields Field Dependencies Set History Tracking

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)		✓

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
Scoping Rules

Milestone 6: Validation rule

i) To create a validation rule to an Appointment Object



Error Message

Example:

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

Error Message

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

https://orgfarm-Saa6b3b4a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F03dgl000000Qav8

Setup Home Object Manager

Object Manager

Appointments Validation Rule

[Back to Appointments](#) [Help for this Page](#)

Validation Rule Detail

Rule Name	Vehicle	Active	<input checked="" type="checkbox"/>
Error Condition Formula	NOT(REGEX(Vehicle_number_plate__c, "A-Z[0-9]{2}(A-Z[0-9]{4})"))		
Error Message	Please enter valid number		
Description	Error Location Vehicle number plate		
Created By	Priya.Dharsini	Modified By	Priya.Dharsini
	9/8/2025, 1:02 AM		9/8/2025, 1:02 AM

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 Dharsini, 9/14/2025, 9:16 AM

Milestone 7: Duplicate rule

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

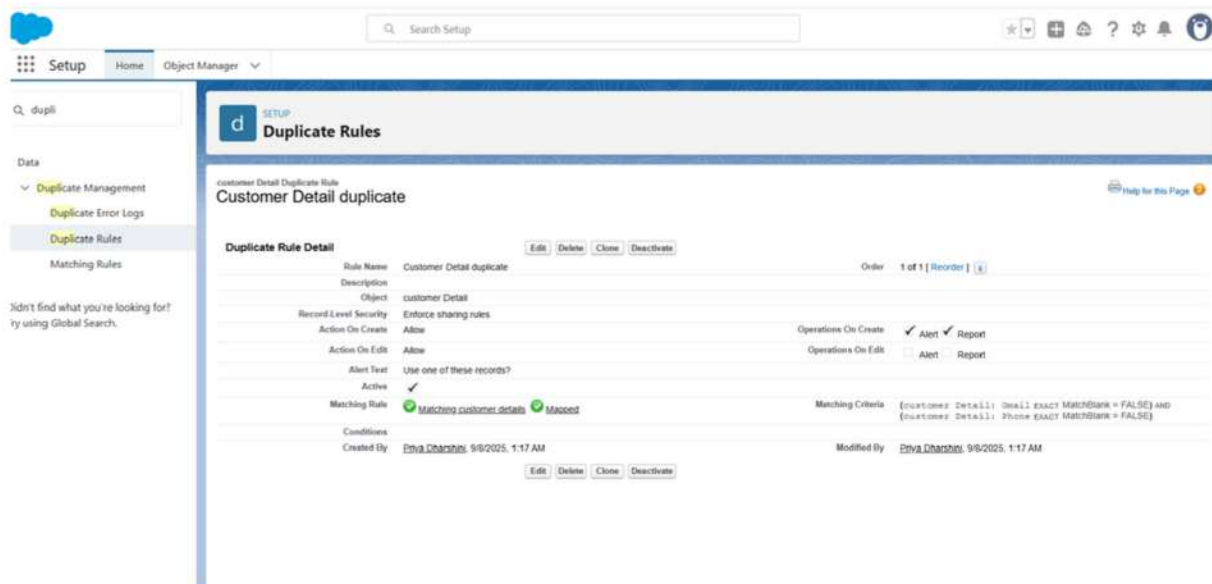


This screenshot shows the 'Matching Rules' page in Salesforce Setup. The left sidebar contains a search bar and a navigation menu with 'Data', 'Duplicate Management', and 'Matching Rules'. The main content area is titled 'Matching Rules' and includes a 'What Are Matching Rules?' section with an 'Exceed' link. Below this is a table of matching rules. The table has columns for 'Action', 'Rule Name', 'Object', 'Status', 'Description', 'Last Modified Date', and 'Last Modified By'. A 'New Rule' button is located above the table.

Action	Rule Name	Object	Status	Description	Last Modified Date	Last Modified By
Alert	Match Name	customer Detail	Active		9/8/2025	me



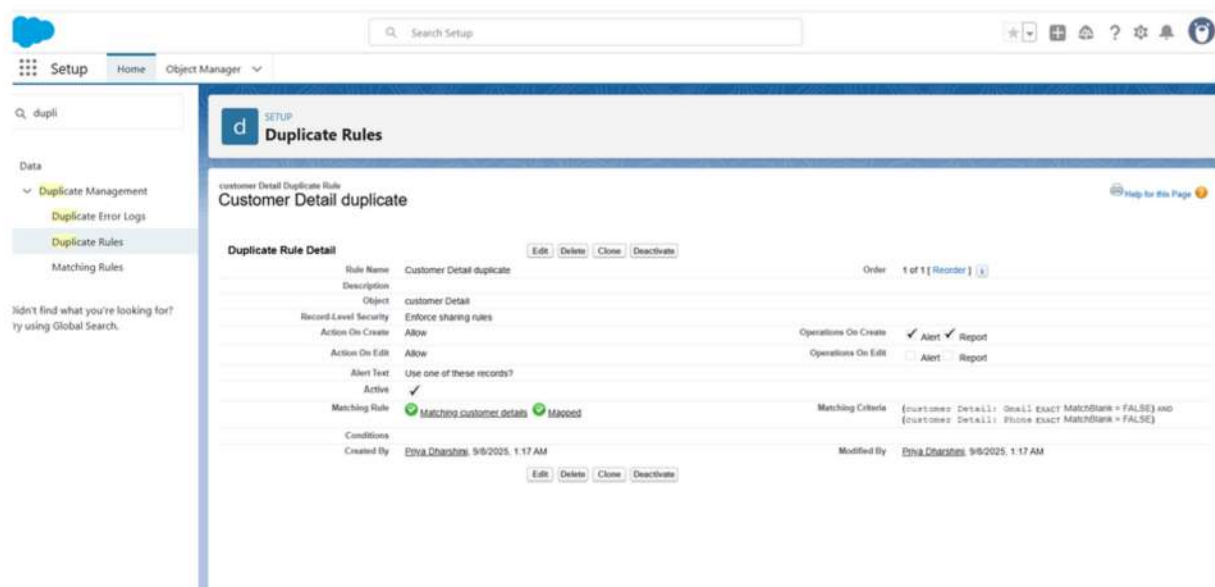
This screenshot shows the 'New Matching Rule' page in Salesforce Setup. The left sidebar is similar to the previous screenshot. The main content area is titled 'New Matching Rule' and includes a 'Step 1: Select object' section. Below this is a form with a 'Select the object to which this matching rule applies' label and a dropdown menu showing 'Customer Detail'. There are 'Next' and 'Cancel' buttons at the bottom right.



This screenshot shows the 'Duplicate Rules' page in Salesforce Setup. The left sidebar contains a search bar and a navigation menu with 'Data', 'Duplicate Management', 'Duplicate Error Logs', 'Duplicate Rules', and 'Matching Rules'. The main content area is titled 'Duplicate Rules' and includes a 'Customer Detail duplicate' section. Below this is a 'Duplicate Rule Detail' table. The table has columns for 'Rule Name', 'Description', 'Object', 'Record Level Security', 'Action On Create', 'Alert Text', 'Active', 'Matching Rule', 'Conditions', 'Created By', 'Modified By', 'Operations On Create', 'Operations On Edit', and 'Matching Criteria'. The table shows a single rule named 'Customer Detail duplicate' with a status of 'Active' and a matching rule of 'Matching customer details'. The 'Created By' and 'Modified By' fields show 'Priva Chanzhi' on 9/8/2025 at 1:17 AM.

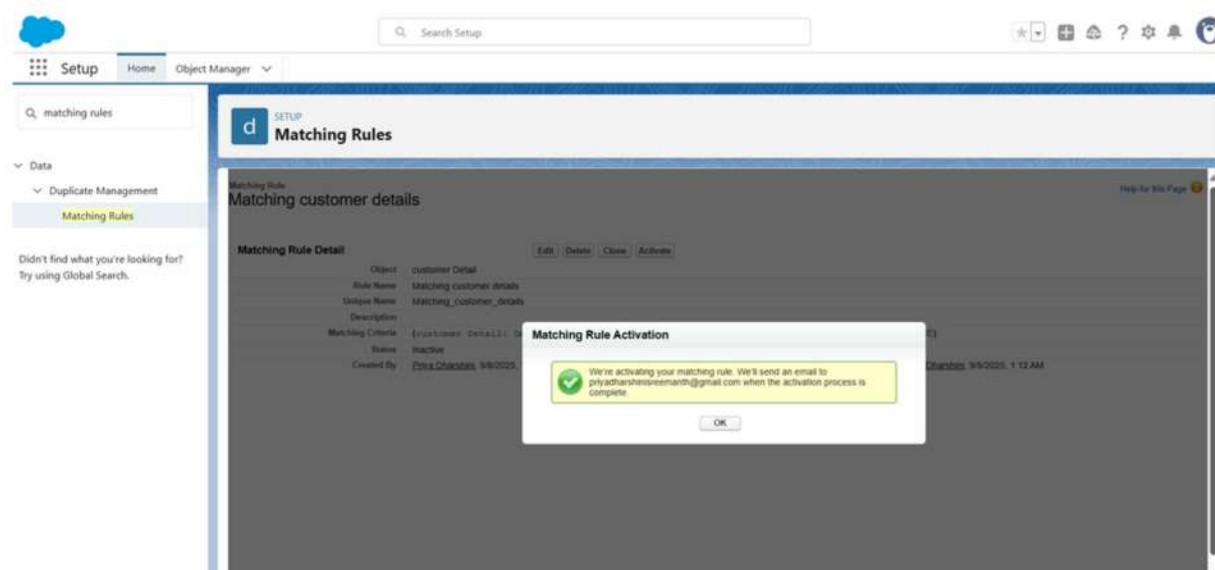
Rule Name	Description	Object	Record Level Security	Action On Create	Alert Text	Active	Matching Rule	Conditions	Created By	Modified By	Operations On Create	Operations On Edit	Matching Criteria
Customer Detail duplicate		customer Detail	Enforce sharing rules	Allow	Use one of these records?	✓	Matching customer details	Matched	Priva Chanzhi, 9/8/2025, 1:17 AM	Priva Chanzhi, 9/8/2025, 1:17 AM	✓ Alert ✓ Report	Alert Report	(customer Detail) Small EXACT MATCH (name = FALSE) AND (customer Detail) Phone EXACT MATCH (name = FALSE)

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



The screenshot shows the Salesforce Setup interface for Duplicate Rules. The left sidebar contains a search bar with 'dupli' and a navigation menu with 'Data', 'Duplicate Management', 'Duplicate Error Logs', 'Duplicate Rules' (selected), and 'Matching Rules'. The main content area is titled 'Duplicate Rules' and shows a table with one rule: 'Customer Detail duplicate'. The rule details are as follows:

Duplicate Rule Detail		Order
Rule Name	Customer Detail duplicate	1 of 1 [Reorder]
Description		
Object	customer Detail	
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: Detail: Email EXACT MatchBlank = FALSE} AND {customer: Detail: Phone EXACT MatchBlank = FALSE}	
Conditions		
Created By	Priya Chakrabarti, 9/8/2025, 1:17 AM	Modified By: Priya Chakrabarti, 9/8/2025, 1:17 AM



The screenshot shows the Salesforce Setup interface for Matching Rules. The left sidebar contains a search bar with 'matching rules' and a navigation menu with 'Data', 'Duplicate Management', and 'Matching Rules' (selected). The main content area is titled 'Matching Rules' and shows a table with one rule: 'Matching customer details'. The rule details are as follows:

Matching Rule Detail		Order
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 Chakrabarti, 9/8/2025, 1:12 AM	

A 'Matching Rule Activation' dialog box is displayed in the center, indicating that the rule is being activated and an email will be sent to priyachakrabarti@gmail.com when the activation process is complete.

Milestone 8: Profiles

i) Manager Profile

The screenshot shows the 'Clone Profile' step in the Dynamics 365 Setup. The 'Existing Profile' dropdown is set to 'Standard User'. The 'User Licenses' dropdown is set to 'Salesforce'. The 'Profile Name' text box contains the text 'manager', which is highlighted with a red box. Below the form are 'Save' and 'Cancel' buttons. A message at the top of the form states: 'You must select an existing profile to clone from.' A link for 'Help for this Page' is visible in the top right corner.

Setup

Home

Object Manager

profiles

profiles

ind what you're looking for?

g Global Search.

SETUP

Profiles

Profile

manage

Help for this Page

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.

Leads SP Access

Enabled Apex Class Access

Enabled Visualforce Page Access

Enabled External Data Source Access

Enabled Named Credential Access

Enabled External Credential Protocol Access

Enabled Custom Metadata Type Access

Enabled Custom Setting Definitions Access

Enabled Flow Access

Enabled Service Process Status Access

Enabled Custom Permissions

Profile Detail

Edit

Close

Delete

View Users

Name	manage	
User License	Salesforce Platform	Custom Profile <input checked="" type="checkbox"/>
Description		
Created By	Erica Chambers	Modified By Erica Chambers
	9/14/2025, 8:30 AM	9/14/2025, 8:30 AM

Page Layouts

Standard Object Layouts	Global	Global Layout (View Assignment)	Lead	Lead Layout (View Assignment)
Email Application	Not Assigned (View Assignment)		Location	Location Layout (View Assignment)
Home Page Layout	Home Page Default (View Assignment)		Location Group	Location Group Layout (View Assignment)
Account	Account Layout (View Assignment)		Location Group Assignment	Location Group Assignment Layout (View Assignment)
Alternative Payment Method	Alternative Payment Method Layout (View Assignment)		Object Milestone	Object Milestone Layout (View Assignment)

Custom App Settings			Service Provider Access		
	Visible	Default		Visible	Default
Analytics Studio (standard__Insights)	<input type="checkbox"/>	<input 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"/>			

Object	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
User External Credentials	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Object	Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Appointments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Billing details and feedback	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Object	Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
customer Detail	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Service records	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Session Settings
Session Times Out After: 8 hours of inactivity
Session Security Level Required at Login: --None--

ii) sales person Profile

Object	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Contact Point Consents	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Streaming Channels	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
User External Credentials	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Object	Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Appointments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Billing details and feedback	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Object	Basic Access				Data Administration		
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
customer Detail	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input 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"/>

Session Settings
Session Times Out After: 8 hours of inactivity
Session Security Level Required at Login: --None--

Password Policies

https://orgfarm-SaaSB3b4-dev-ed.develop.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00eql000004UCEL%3Fsetupid%3DEnhancedProfiles%26appLayout%3D... A+ ?

Setup Home Object Manager

Search Setup

prof

Users Profiles

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

Profiles

Profile Manager

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.

Login IP Ranges (0) | Enabled Apex Class Access (0) | Enabled Visualforce Page Access (0) | Enabled External Data Source Access (0) | Enabled Named Credential Access (0) | Enabled External Credential Principal Access (0) | Enabled Custom Metadata Type Access (0) | Enabled Custom Settings Definition Access (0) | Enabled Flow Access (0) | Enabled Service Presence Status Access (0) | Enabled Custom Permissions (0)

[Edit](#) [Clone](#) [Delete](#) [View Users](#)

Profile Detail	
Name	Manager
User License	Salesforce
Description	
Created By	Priva Chanchos 9/8/2025, 1:22 AM
Modified By	Priva Chanchos 9/8/2025, 1:32 AM
Custom Profile	<input checked="" type="checkbox"/>

Page Layouts	
Standard Object Layouts	Location Group Assignment
Global	Global Layout (View Assignment)
Email Application	Not Assigned (View Assignment)
Home Page Layout	Home Page Default (View Assignment)
Account	Account Layout (View Assignment)
Alternative Payment Method	Alternative Payment Method Layout (View Assignment)
Appointment Invitation	Appointment Invitation Layout (View Assignment)
	Macro
	Object Milestone
	Operating Hours
	Opportunity
	Opportunity Product

Milestone 9: Role & Role Hierarchy

i) Creating Manager Role

Understanding Roles

Set up your Role Hierarchy to control how your organization reports on and accesses data.

Sample Role Hierarchy

View other sample Role Hierarchies: Territory-based Sample

Executive Staff

CEO, President, CFO, VP, Sales

Western Sales Director

Director of W. Sales

CA Sales Rep, OH Sales Rep

Eastern Sales Director

Director of E. Sales

NY Sales Rep, MA Sales Rep

International Sales Director

Director of Int'l Sales

Asian Sales Rep, European Sales Rep

View & edit data, roll up forecasts, & generate reports for all users below

View & edit data, roll up forecasts, & generate reports for all users directly below

View & edit data, roll up forecasts, & generate reports only for own data. Can't access data of users above or at same level

Set Up Roles

Don't show this page again

Creating the Role Hierarchy

You can build on the existing role hierarchy shown on this page. To insert a new role, click **Add Role**.

Your Organization's Role Hierarchy

College of Liberal Arts and Sciences @ Tips global Kovilpalayam

CEO Edit | Del | Assign

CFO Edit | Del | Assign

COO Edit | Del | Assign

Manager Edit | Del | Assign

sales.person 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

Show in tree view

Setup

Home

Object Manager

Roles

Settings

Roles on Contracts

Roles on Opportunities

Roles on Cases

Label

manager

Role Name

manager

This role reports to

CEO

Role Name as displayed on reports

manager

Save Save & New Cancel

Setup

Roles

Role Edit

New Role

Label

manager

Role Name

manager

This role reports to

CEO

Role Name as displayed on reports

manager

Save Save & New Cancel

Setup

Roles

Role

Manager

Below is the list of users assigned to this role. Click Edit to modify the role name. Click Assign Users to Role to assign existing users to this role. Click New User to create a user for this role.

Hierarchy: Ruthrham college of liberal arts and science @ Tps global Kovalataym > CEO > Manager

Siblings: SVP_Sales & Marketing SVP_Customer Service & Support CEO SVP_Human Resources COO

Users in Manager Role (0)

Role Detail

Label

Manager

This role reports to

CEO

Modified By

Priya Dhanasekaran 9/5/2025, 1:47 AM

Opportunity Access

Users in this role can **edit** all opportunities associated with accounts that they own, regardless of who owns the opportunities

Case Access

Users in this role can **edit** all cases associated with accounts that they own, regardless of who owns the cases

Role Name

Manager

Role Name as displayed on reports

Role: Role and Internal Subordinates

Sharing Groups

Role: Role and Internal Subordinates

Assign Users to Role

New User

Users in Manager Role Help

Users in Manager Role

No records to display

ii)Creating another roles

The top screenshot displays the Salesforce Setup interface with the 'Roles' page selected. The left sidebar shows the navigation menu with 'Roles' highlighted. The main content area lists various roles in a tree structure, including CEO, CFO, COO, Manager, sales person, SVP, Customer Service & Support, Customer Support International, Customer Support North America, Installation & Repair Services, SVP Human Resources, SVP Sales & Marketing, VP International Sales, and VP Marketing. Each role has links for 'Add Role', 'Edit', 'Del', and 'Assign'.

The bottom screenshot shows the 'sales person' role detail page. The left sidebar is expanded to show 'Users' and 'Roles'. The main content area includes a 'Role Detail' section with the following information:

- Label:** sales person
- This role reports to:** Manager
- Modified By:** Priti Chatterjee, 9/5/2025, 1:50 AM
- Opportunity Access:** Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities
- Case Access:** Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases
- Role Name:** sales_person
- Role Name as displayed on reports:** Role Name as displayed on reports
- Sharing Groups:** Role, Role and Internal Subordinates

Below the role details, there is a section titled 'Users in sales person Role' with a link to 'Assign Users to Role' and a 'New User' button. The section indicates 'No records to display'.

Milestone 10: Users

i) Create User

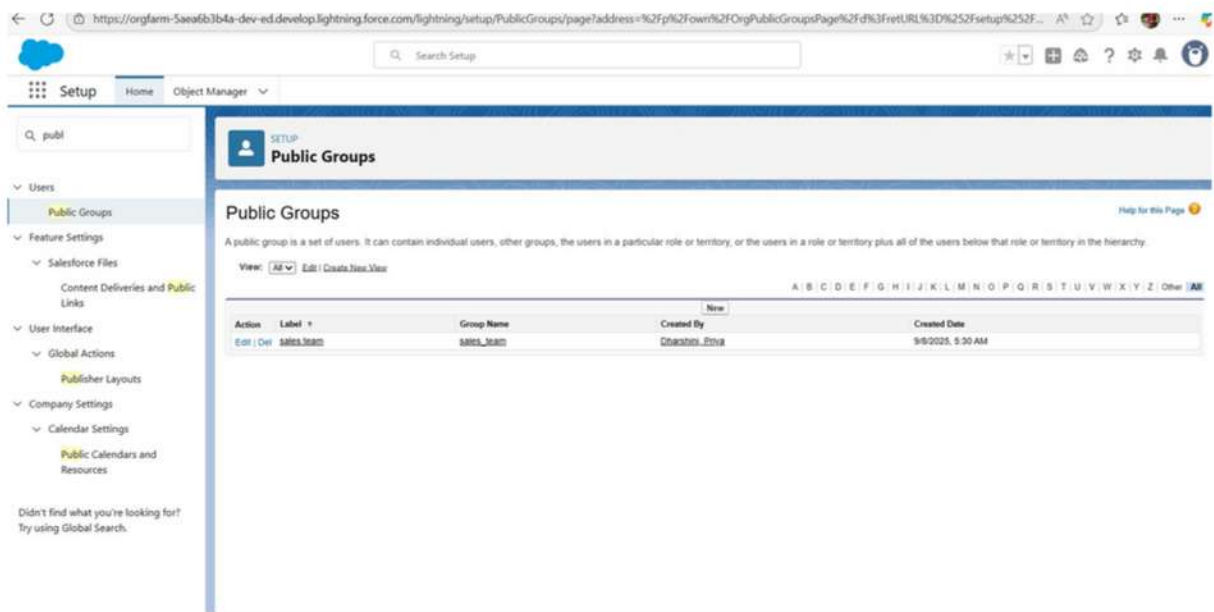
The screenshot shows the 'New User' form in the Salesforce Setup interface. The left sidebar contains navigation links for 'Users', 'Permission Set Groups', 'Permission Sets', 'Profiles', 'Public Groups', 'Queues', 'Roles', and 'User Management Settings'. The main content area is titled 'New User' and includes a 'User Edit' section with 'Save', 'Save & New', and 'Cancel' buttons. The 'General Information' section contains fields for First Name (priya), Last Name (Priya Dhanshin), Alias (ppriya), Email (priyadhanshin@agentforce.com), Username (srishty5@agentforce.com), Nickname (User175785039677767620), Title, Company (Developer), Department, and Division. The 'Rule' dropdown is set to '<None Specified>', 'User License' is 'Force.com - Free', and 'Profile' is 'Force.com - Free User'. The 'Active' checkbox is checked. On the right, there are checkboxes for 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', and 'WDC User'. At the bottom, there are dropdowns for 'Data.com User Type' (set to '-None-') and 'Data.com Monthly Addition Limit' (set to 'Default Limit (3000)').

ii) creating another users

The screenshot shows the 'User Detail' page for a user named Niklaus Mikaelson in the Salesforce Setup interface. The left sidebar is identical to the previous screenshot. The main content area is titled 'User' and includes a 'User Detail' section with 'Edit', 'Sharing', 'Reset Password', 'Freeze', and 'View Summary' buttons. The 'User Detail' section contains fields for Name (Niklaus Mikaelson), Alias (nmika), Email (priyadhanshin@agentforce.com), Username (priyashy5@agentforce.com), Nickname (nmika), 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, and Federation ID. The 'Role' dropdown is set to 'Manager', 'User License' is 'Salesforce', and 'Profile' is 'Manager'. The 'Active' checkbox is checked. On the right, there are checkboxes for 'Marketing User', 'Offline User', 'Knowledge User', 'Flow User', 'Service Cloud User', 'Site.com Contributor User', 'Site.com Publisher User', 'WDC User', 'Mobile Push Registrations', 'Data.com User Type', 'Accessibility Mode (Classic Only)', 'Debug Mode', and 'High-Contrast Palette on Charts'.

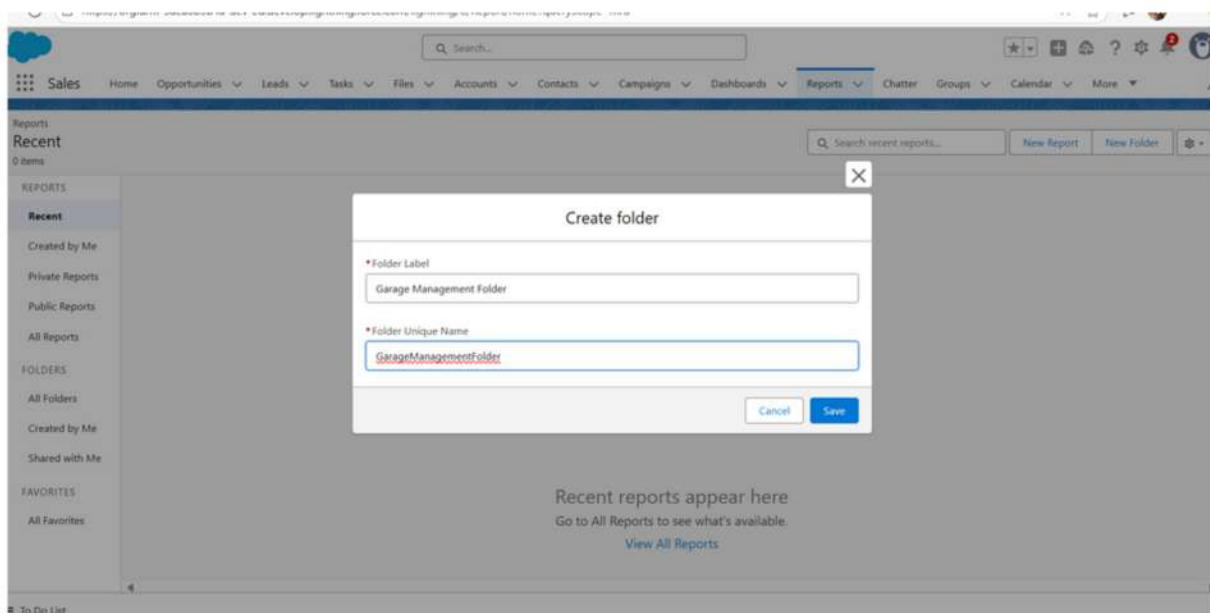
Milestone 11: Public groups

i)Creating New Public Group



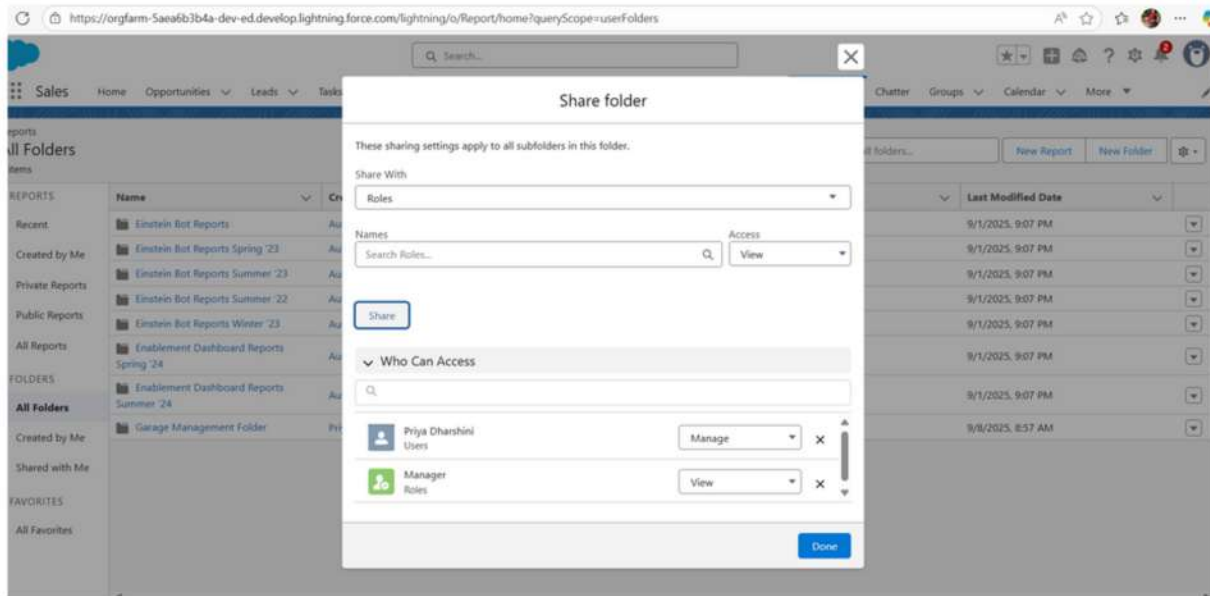
Milestone 12: Share setting

i)Creating Sharing settings



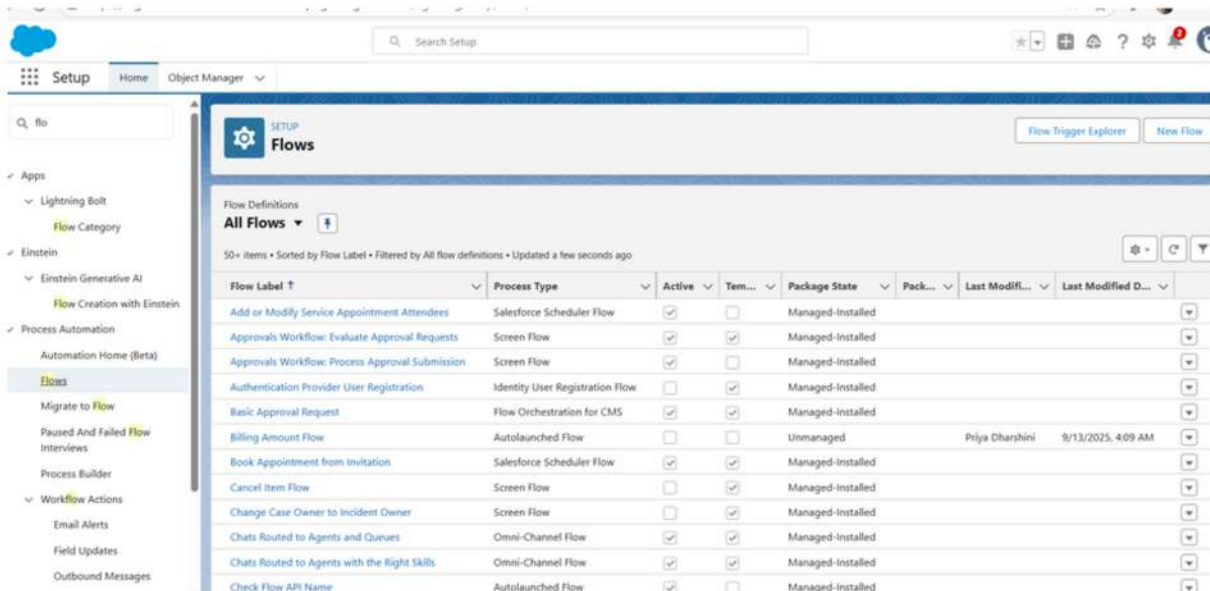
The folder named Garage Management Folder was created.

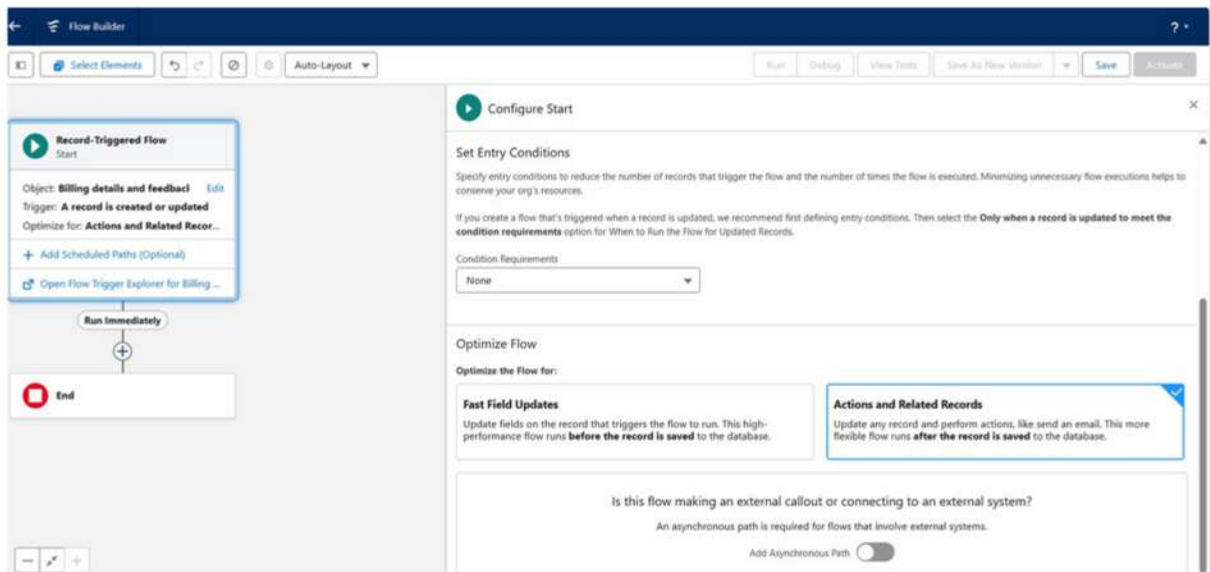
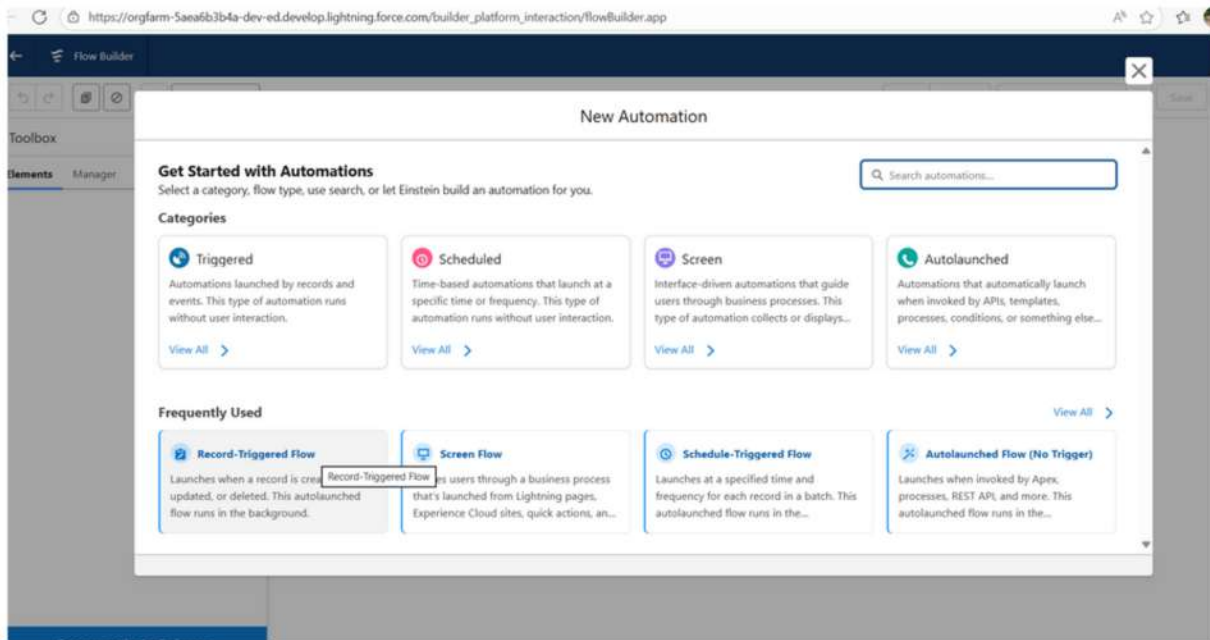


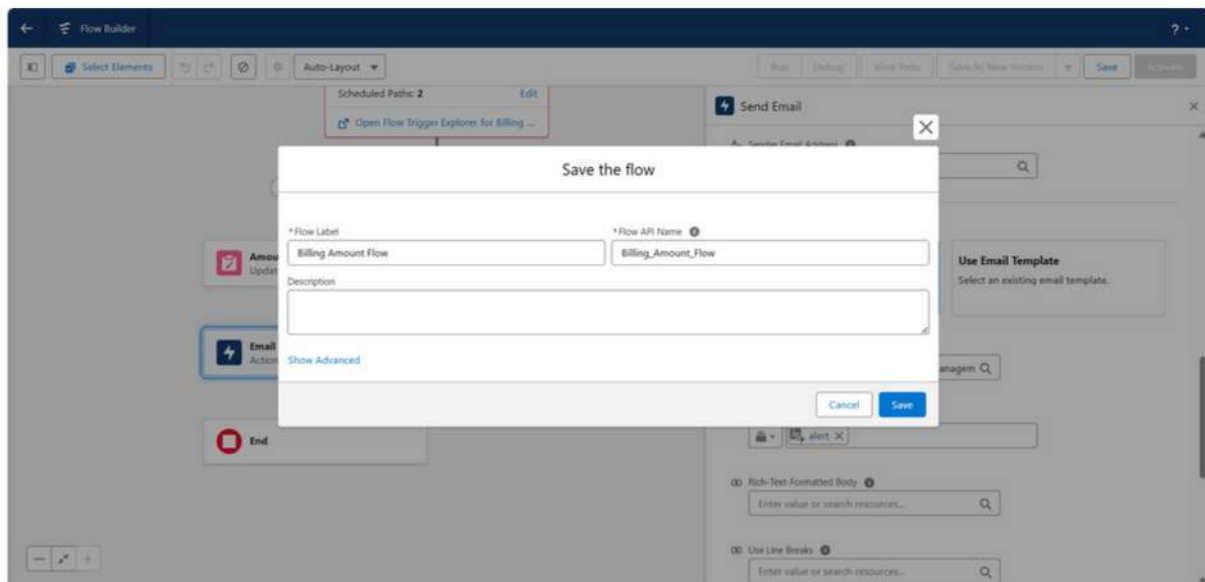
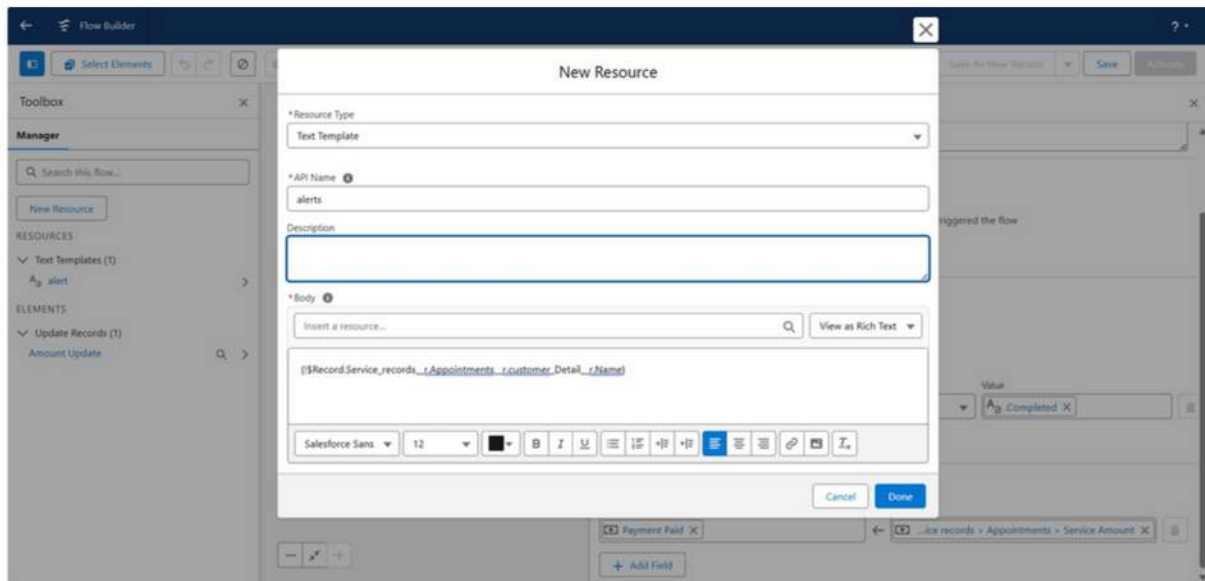


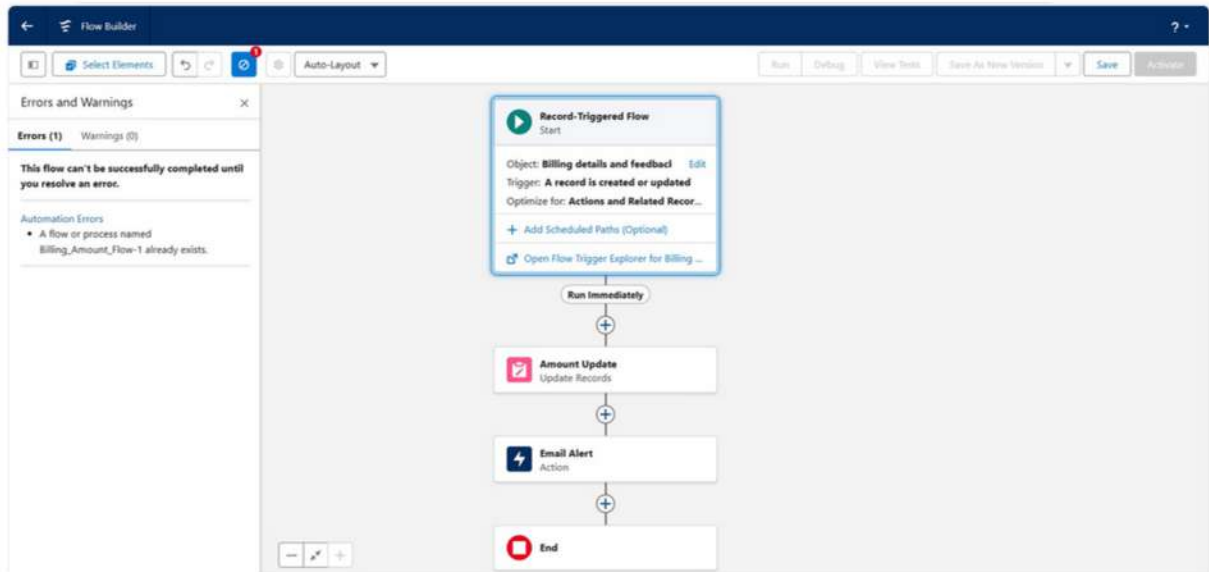
Milestone 13: Flows

i) Create a Flow





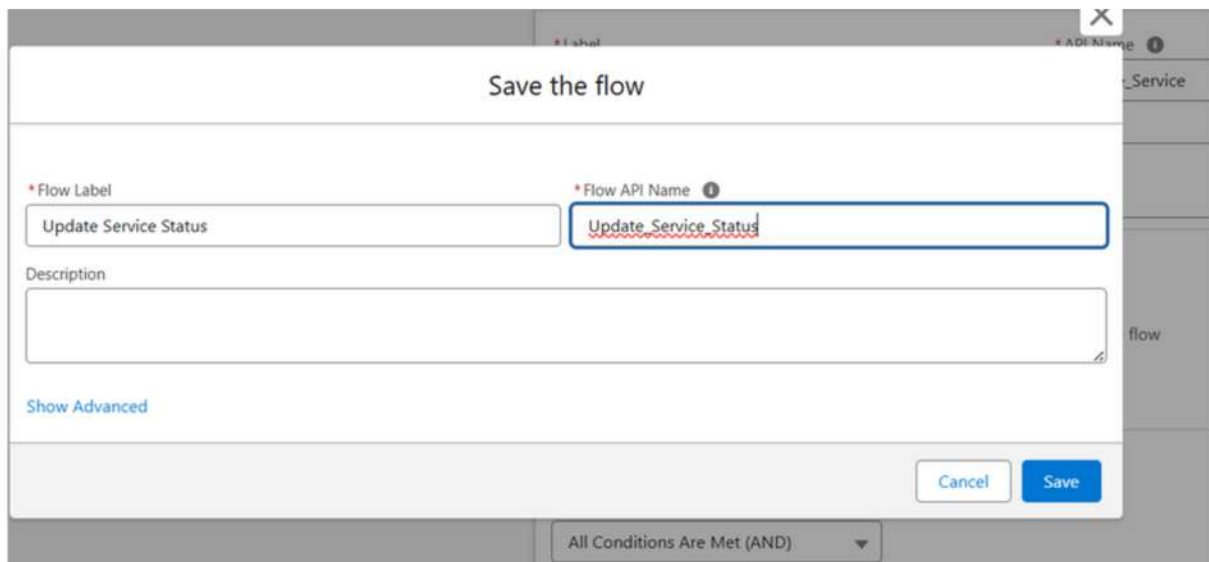
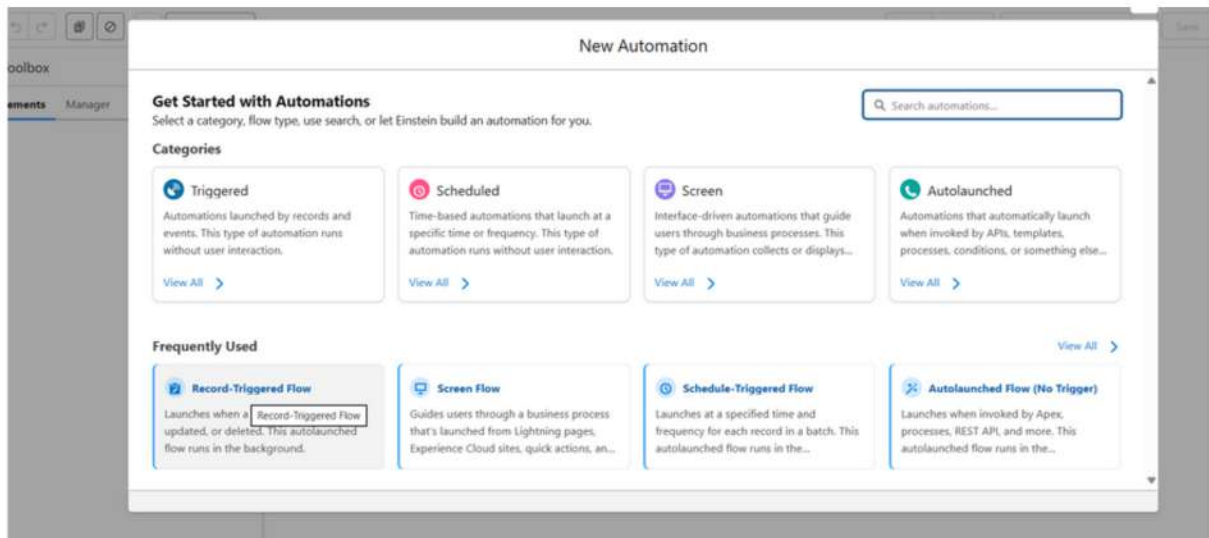




ii) Create another Flow

The screenshot shows the Salesforce Setup page, specifically the 'Flows' section. The left sidebar contains navigation options: Setup, Home, Object Manager, Apps, Lightning Bolt, Flow Category, Einstein, Einstein Generative AI, Flow Creation with Einstein, Process Automation, Automation Home (Beta), Flows, Migrate to Flow, Paused And Failed Flow Interviews, Process Builder, Workflow Actions, Email Alerts, Field Updates, and Outbound Messages. The main content area displays a table of flow definitions.

Flow Label ↑	Process Type	Active	Tem...	Package State	Pack...	Last Modifi...	Last Modified D...
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			



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
Start
Object: **Service records** | Edit
Trigger: **A record is created or updated**
Optimize for: **Actions and Related Records**
+ Add Scheduled Path (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 X	Equals	True X

+ Add Condition

Set Field Values for the Service records Record

Milestone 14: Apex trigger

i) Apex handler

File | Edit | Debug | Test | Workspace | Help

New | Open | Open Resource | Open Lightning Resources | Open Log | Open Raw Log | Download Log | Save | Save All | Delete | Close | Close All

Apex Class | Apex Trigger | Visualforce Page | Visualforce Component | Static Resource | Lightning Application | Lightning Component | Lightning Interface | Lightning Event | Lightning Tokens

```

13 *   if(app.Maintenance_service_c == true && app.Repairs_c == true && app.Replacement_Parts_c == true){
14 *
15 *       app.Service_Amount_c = 10000;
16 *
17 *   }
18 *
19 *   else if(app.Maintenance service c == true && app.Repairs_c == true){

```

Logs | Tests | Checkpoints | Query Editor | View State | Progress | Problems

Name	Line	Problem
------	------	---------

New Apex Trigger

Name:

sObject:

```

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
11 for(Appointments__c app : listApp){
12
13     if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){
14
15         app.Service_Amount__c = 10000;
16
17     }
18
19     else if(app.Maintenance service  c == true && app.Repairs __c == true){

```

```

19     else if(app.Maintenance_service__c == true && app.Repairs__c == true){
20
21         app.Service_Amount__c = 5000;
22
23     }
24
25     else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){
26
27         app.Service_Amount__c = 8000;
28
29     }
30
31     else if(app.Repairs__c == true && app.Replacement_Parts__c == true){
32
33         app.Service_Amount__c = 7000;
34
35     }
36
37     else if(app.Maintenance service  c == true){

```

```
Code Coverage: None | API Version: 64
37 else if(app.Maintenance_service__c == true){
38
39     app.Service_Amount__c = 2000;
40
41 }
42
43 else if(app.Repairs__c == true){
44
45     app.Service_Amount__c = 3000;
46
47 }
48
49 else if(app.Replacement_Parts__c == true){
50
51     app.Service_Amount__c = 5000;
52
53 }
54
55
```

ops Tests Checkpoints Query Editor View State Progress Problems

Line	Problem
------	---------

```
File Edit Debug Test Workspace Help < >
AmountDistributionHandler.apxc AmountDistribution.apxt
Code Coverage: None | API Version: 64
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 }
6
```


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;

    }
}
}
}

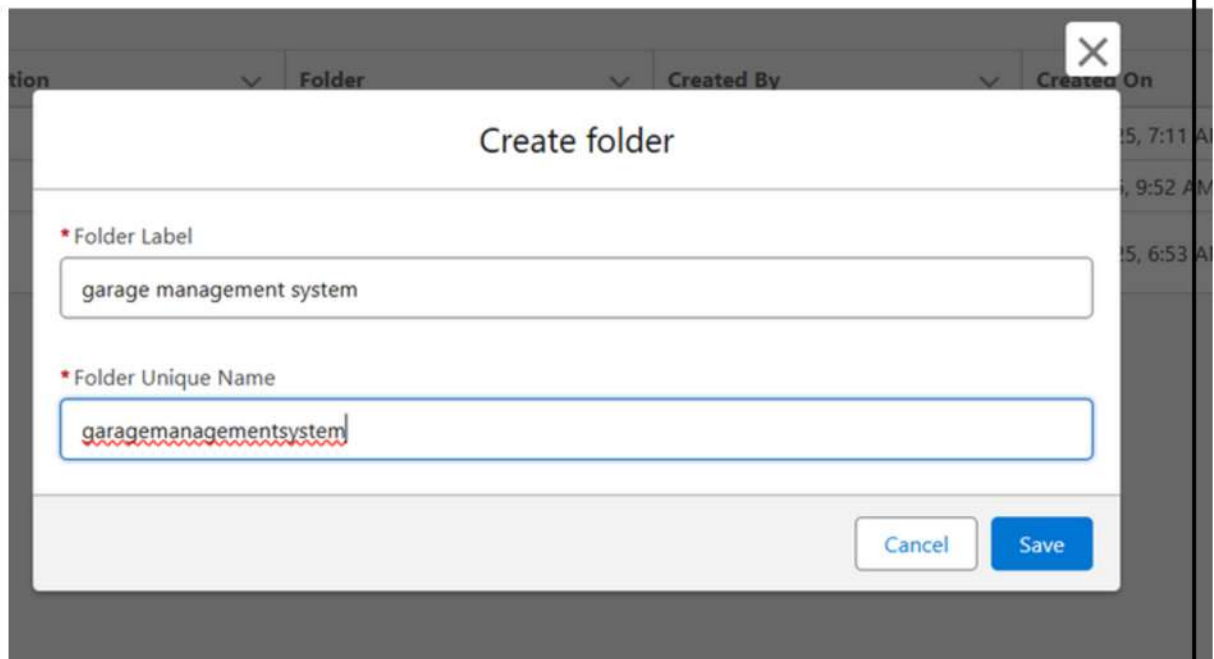
C O D E   F O R   A P E X   T R I G G E R :

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

```

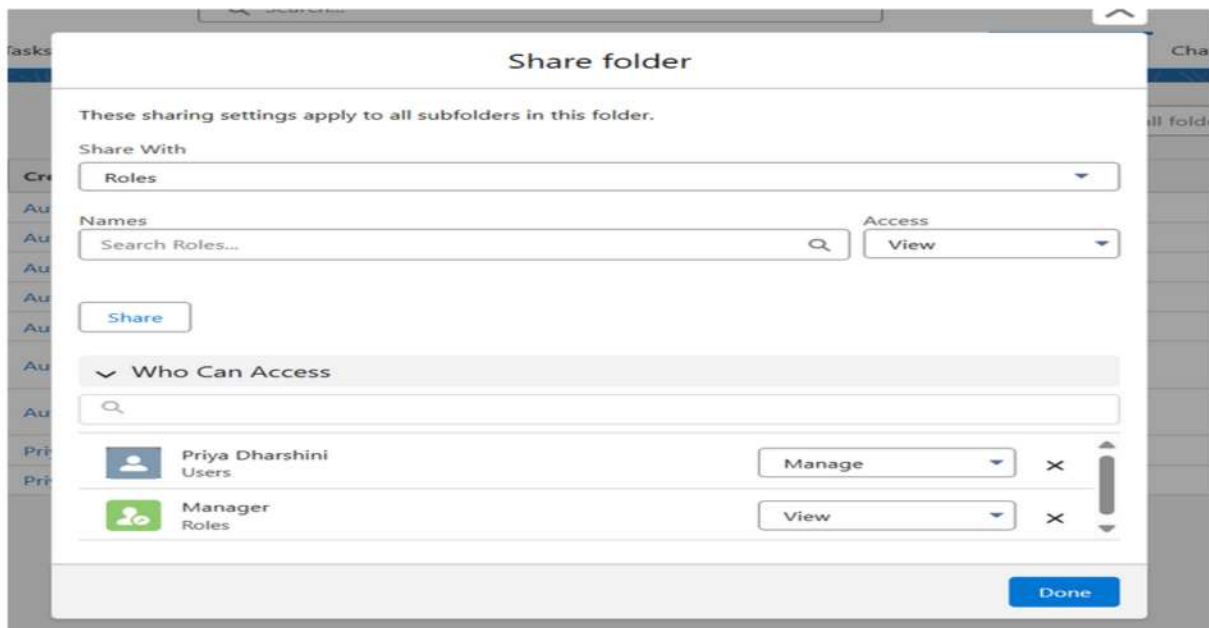
Milestone 15: Reports

i)create a report folder

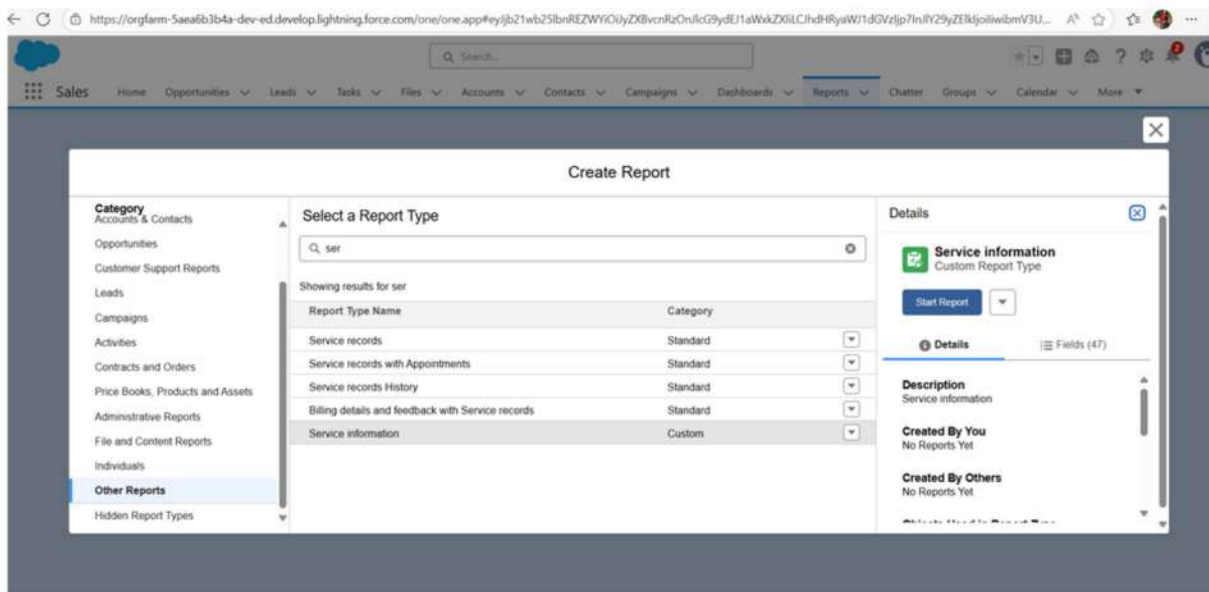


The screenshot shows the 'Create folder' dialog box in Salesforce. The dialog has a title bar with a close button. It contains two required fields: 'Folder Label' with the value 'garage management system' and 'Folder Unique Name' with the value 'garagemanagementsystem'. At the bottom are 'Cancel' and 'Save' buttons.

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

Fields


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

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 f

A Venn diagram illustrating the relationship between four data sets: A (customer Detail), B (Appointments), C (Service records), and D (Billing details and feedback). The diagram shows the intersection of these sets, with the central intersection of all four sets highlighted in grey. Below the diagram is a table with columns A, B, C, and D, each containing a list of horizontal bars representing data records.



Search...

Sales

Home

Opportunities

Leads

Tasks

Files

Accounts

Contacts

Campaigns

Dashboards

Reports

Chatter

Groups

Calendar

More

REPORT

New Service information Report

Service information

Previewing 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

Columns

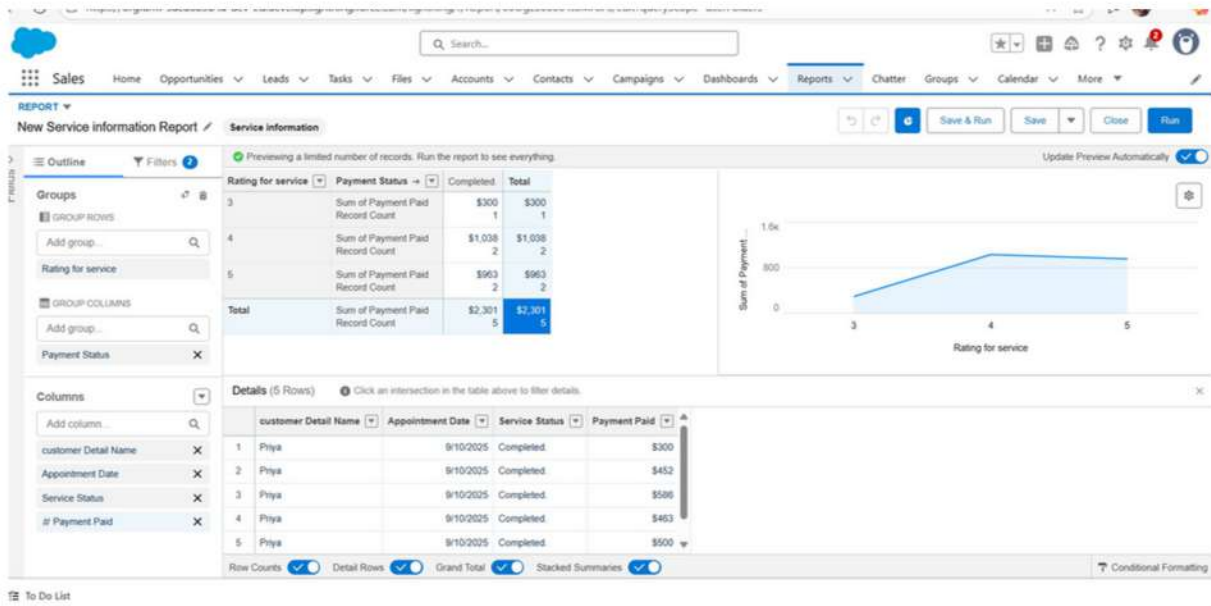
Add column

customer Detail Name

Appointments Name

Service records Name

Billing details and feedback Name



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

Report Service information Save & Run

Save Report As

*Report Name
New Service information Report

Report Unique Name
New_Service_information_Report_MRC

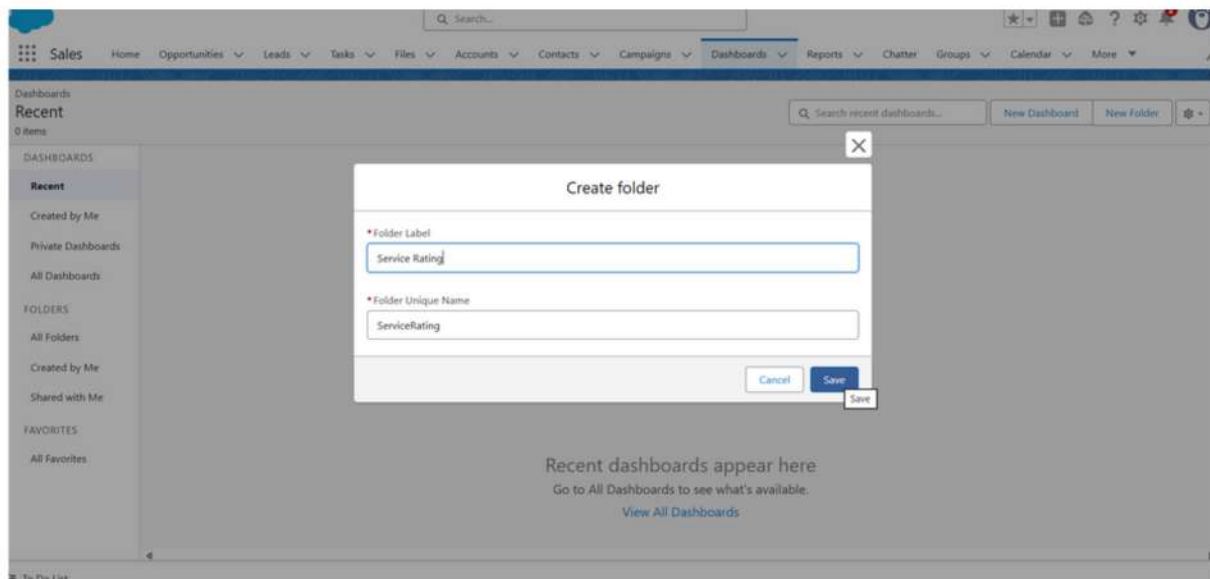
Report Description

Folder
Garage Management Folder Select Folder

Cancel Save

Milestone 16: Dashboards

i) Create Dashboard Folder



The screenshot shows the Salesforce Dashboards interface with a 'Create folder' dialog box open. The dialog has two input fields: 'Folder Label' with the text 'Service Rating' and 'Folder Unique Name' with the text 'ServiceRating'. At the bottom right of the dialog are 'Cancel' and 'Save' buttons. The background shows the 'Recent' section of the Dashboards page with a sidebar menu and a main area that says 'Recent dashboards appear here'.

Search...

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

Dashboards

Recent

0 items

Search recent dashboards...

New Dashboard New Folder

DASHBOARDS

Recent

Created by Me

Private Dashboards

All Dashboards

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

To Do List

Create folder

* Folder Label

Service Rating

* Folder Unique Name

ServiceRating

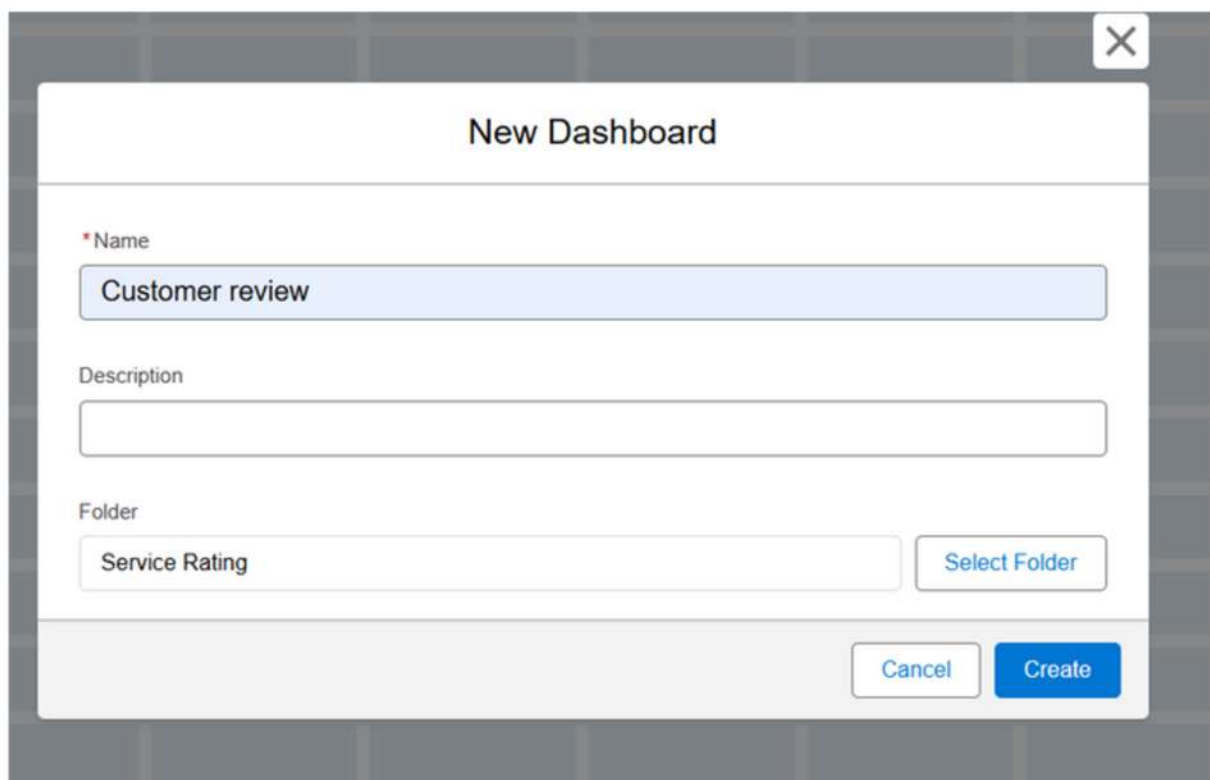
Cancel Save

Recent dashboards appear here

Go to All Dashboards to see what's available.

[View All Dashboards](#)

ii) Create Dashboard



The screenshot shows the 'New Dashboard' dialog box. It contains three fields: 'Name' with the text 'Customer review', 'Description' (empty), and 'Folder' with the text 'Service Rating'. To the right of the 'Folder' field is a 'Select Folder' button. At the bottom right are 'Cancel' and 'Create' buttons.

New Dashboard

* Name

Customer review

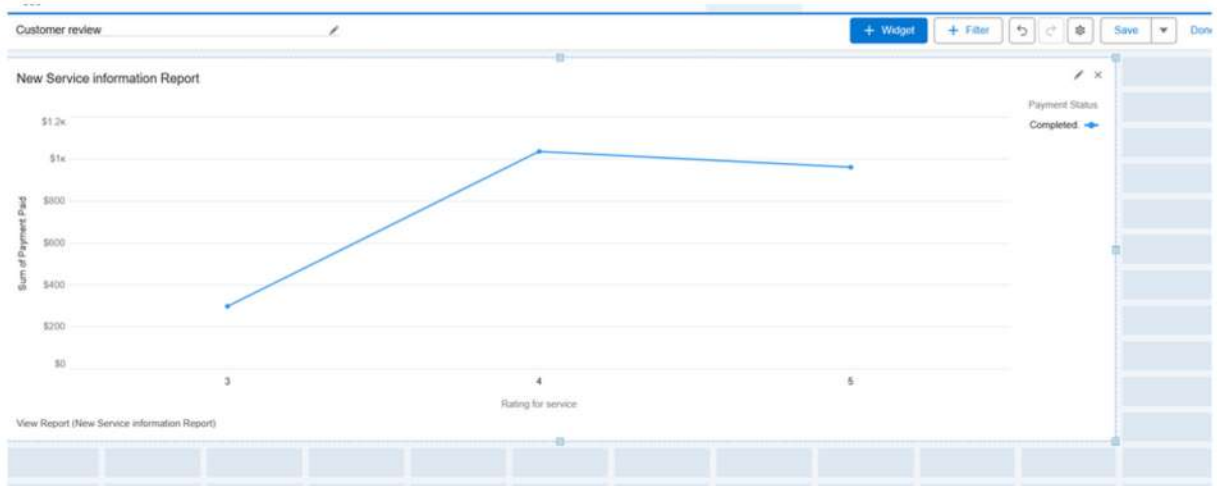
Description

Folder

Service Rating

Select Folder

Cancel Create



Search...

Edit Subscription

Schedule dashboard refreshes and subscribe to receive results.

Settings

Frequency: ☐ Daily ☒ Weekly ☐ Monthly

Days: ☐ Sun ☒ Mon ☐ Tue ☐ Wed ☐ Thu ☐ Fri ☐ Sat

Time:

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:

Milestone 17: User Adoption

i)creating records

Garage Manage... customer Detail Appointments Service records Billing details and feedback Reports Dashboards

customer Detail
mac

New Contact Edit New Opportunity

Related Details

customer Detail Name
mac

Phone
(567) 876-5567

Gmail
mac@gmail.com

Created By
Priya Dhanshini, 9/10/2025, 9:26 AM

Owner
Priya Dhanshini

Last Modified By
Priya Dhanshini, 9/10/2025, 9:26 AM

Activity

Filters: All time • All activities • All types

Refresh Expand All View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

Garage Manage... customer Detail Appointments Service records Billing details and feedback Reports Dashboards

Appointments
Appointment #001

New Contact Edit New Opportunity

Related Details

Appointments Name
Appointment #001

customer Detail
mac

Maintenance service
☒

Repairs
☒

Replacement Parts
☐

Appointment Date
9/10/2025

Service Amount
\$500

Vehicle number plate
TS30EU0443

Created By
Priya Dhanshini, 9/10/2025, 9:31 AM

Owner
Priya Dhanshini

Last Modified By
Priya Dhanshini, 9/10/2025, 9:31 AM

Activity

Filters: All time • All activities • All types

Refresh Expand All View All

Upcoming & Overdue

No activities to show.
Get started by sending an email, scheduling a task, and more.

No past activity. Past meetings and tasks marked as done show up here.

New Service records

* = Required Information

Information

*Service records Name

ser-109

Appointments

Appointment #001

Quality Check Status

☒

Service Status

Started

Owner

Priya Dharshini

Cancel

Save & New

Save

https://orgindm-databas.../service_records.../view

Search...

Garage Manageme... customer Detail Appointments Service records Billing details and feedback Reports Dashboard

Service records

ser-109

Related

Details

Service records Name

ser-109

Appointments

Appointment #001

Quality Check Status

☒

Service Status

Completed.

service date

9/10/2025

service data

9/10/2025

Created By

Priya Dharshini. 9/10/2025, 9:36 AM

Owner

Priya Dharshini

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.**
-

Disadvantages:

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

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.

