

# **Garage Management system**

**College Name: Nandha Arts and Science  
College(Autonomous),Erode-52**

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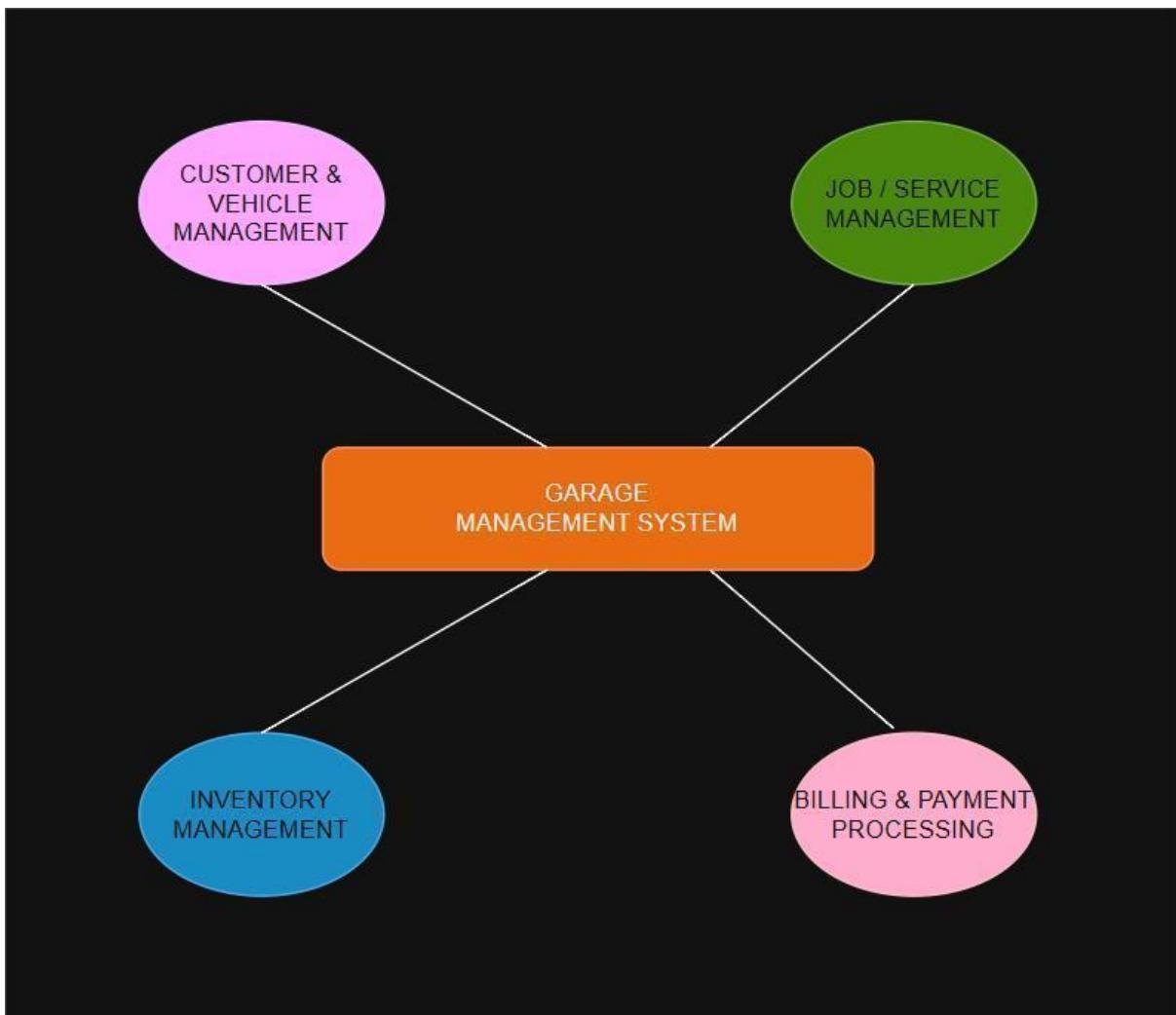
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# 1. INTRODUCTION

## 1.1 Project Overview

The Garage Management System (GMS) is a software solution developed to simplify and automate the daily operations of automobile service centers. It provides an integrated platform to manage customer details, vehicle information, job assignments, spare parts inventory, billing, and reporting. The system eliminates the challenges of traditional manual methods, such as misplaced records, delayed service, and inventory mismanagement. By offering real-time data access and automation, the GMS improves workflow efficiency, enhances accuracy, and reduces human effort. Ultimately, it helps garages deliver faster and more reliable services, leading to improved customer satisfaction and better business performance.



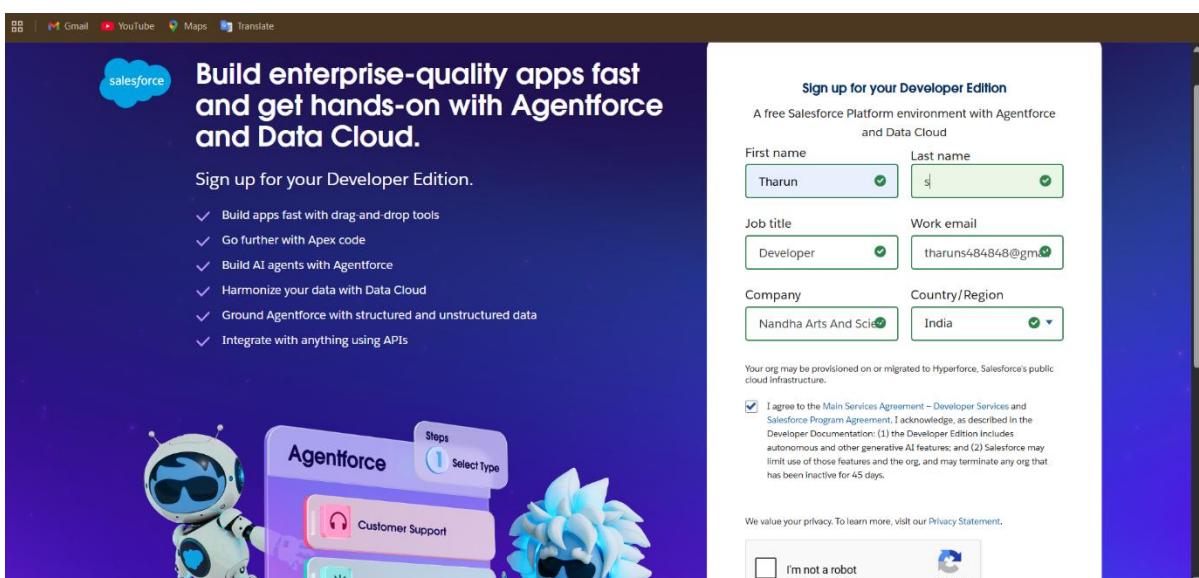
## 1.2 Purpose

The main purpose of the Garage Management System is to automate and streamline the daily operations of automobile service centers. It reduces dependency on manual records by providing a digital platform to manage customers, vehicles, repair jobs, spare parts, and billing activities. Accurate and quick record-keeping of customer and vehicle details. Efficient job assignment and progress tracking for mechanics. Real-time monitoring of spare parts inventory. Instant invoice generation and payment tracking. Improved communication between staff and customers. By integrating these features, the GMS enhances operational efficiency, minimizes errors, and improves overall customer satisfaction.

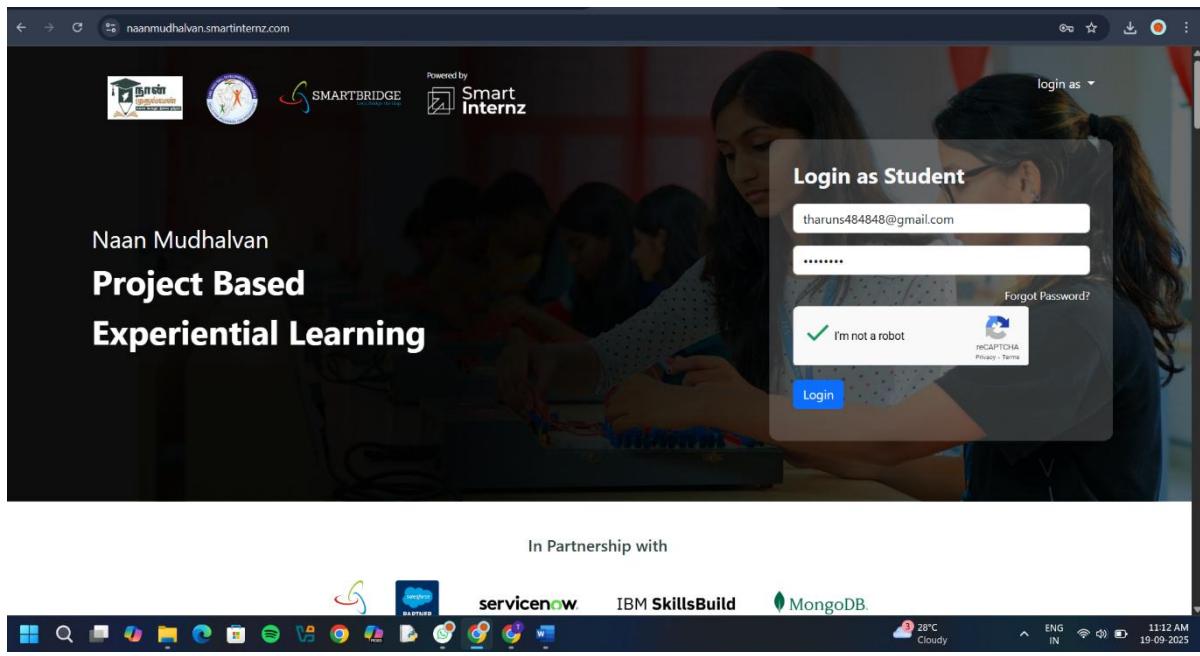
# DEVELOPMENT PHASE

### Creating Developer Account:

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

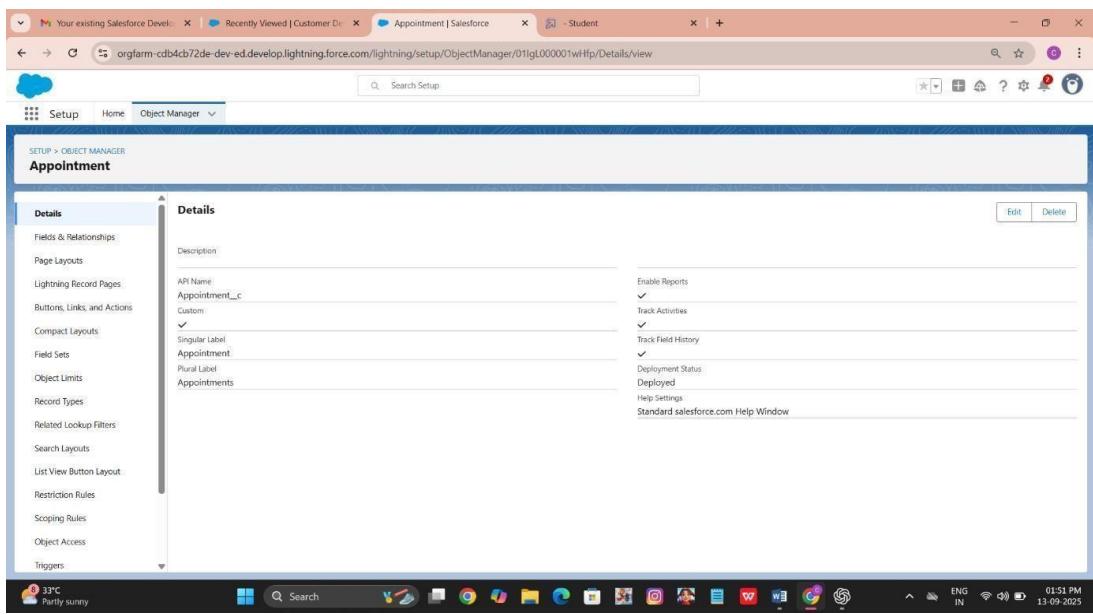


- Created objects: Customer Details, Appointment, Service records, Billing details and feedback



This screenshot shows a user profile page on the Smart Internz platform. The left sidebar shows navigation links for Home, Projects, and Support, with the user's name "THARUN S" highlighted. The main content area displays a "PROFILE" section with the user's name, email, NM\_ID, and last login timestamp. Below this, there are sections for "CATEGORY" (Salesforce Developer), "PROJECT TITLE" (Garage Management system), "ROCKET CHAT USERNAME" (tharuns484848@gmail.com), and "ROCKET CHAT PASSWORD". At the bottom, there are download links for the Rocket Chat app on Google Play and the App Store. The Windows taskbar at the bottom shows various open applications and the current date and time (11:12 AM, 19-09-2025).

- Created objects: Customer Details, Appointment, Service records, Billing details and feedback



The image displays two side-by-side screenshots of the Salesforce Object Manager setup screen. Both screens show the 'Details' tab for object configuration.

**Top Screenshot (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

**Bottom Screenshot (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

- Configured fields and relationships

Your existing Salesforce Development Environment | Recently Viewed | Customer Details | Customer Details | Salesforce | - Student

orgfarm-cdb4cb72de-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgL000001wHcb/FieldsAndRelationships/view

Setup Home Object Manager

Customer Details

**Fields & Relationships**  
6 Items, Sorted by Field Label

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

Quick Find New Deleted Fields Field Dependencies Set History Tracking

- 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
- Scoping Rules
- Object Access
- Triggers

33°C Partly sunny 01:53 PM 13-09-2025

Your existing Salesforce Development Environment | Recently Viewed | Customer Details | Appointment | Salesforce | - Student

orgfarm-cdb4cb72de-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgL000001wHfp/FieldsAndRelationships/view

Setup Home Object Manager

Appointment

**Fields & Relationships**  
13 Items, Sorted by Field Label

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment Date	Appointment_Date_c	Date		▼
Appointment Name	Name	Auto Number		▼
Created By	CreatedById	Lookup(User)		▼
Customer Details	Customer_Details_c	Lookup(Customer Details)		▼
Customer Name	Customer_c	Text(10)		▼
Last Modified By	LastModifiedById	Lookup(User)		▼
Maintenance service	Maintenance_service_c	Checkbox		▼
Owner	OwnerId	Lookup(User,Group)		▼
Payment Paid	Payment_Paid_c	Currency(18, 0)		▼
Repairs	Repairs_c	Checkbox		▼
Replacement Parts	Replacement_Parts_c	Checkbox		▼
Service Amount	Service_Amount_c	Currency(18, 0)		▼

Quick Find New Deleted Fields Field Dependencies Set History Tracking

- Details
- Fields & Relationships**
- Page Layouts
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- Triggers

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Your existing Salesforce Dev... | Recently Viewed | Customer De... | Service records | Salesforce | - Student

orgfarm-cdb4cb72de-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgL000001wHj3/FieldsAndRelationships/view

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

### Service records

**Fields & Relationships**

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Appointment	Appointment__c	Lookup(Appointment)		✓
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Quality Check Status	Quality_Check_Status__c	Checkbox		
service date	service_date__c	Formula (Date)		
Service records Name	Name	Auto Number		✓
Service Status	Service_Status__c	Picklist		

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

Scoping Rules

Object Access

Triggers

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Search

01:53 PM 13-09-2025

Your existing Salesforce Dev... | Recently Viewed | Customer De... | Billing details and feedback | Service records | Salesforce | - Student

orgfarm-cdb4cb72de-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgL000001wHmI/FieldsAndRelationships/view

Setup Home Object Manager

Search Setup

SETUP > OBJECT MANAGER

### Billing details and feedback

**Fields & Relationships**

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Billing details and feedback Name	Name	Auto Number		✓
Created By	CreatedBy	Lookup(User)		
Last Modified By	LastModifiedBy	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Payment Paid	Payment_Paid__c	Currency(4, 2)		
Payment Status	Payment_Status__c	Picklist		
Rating for service	Rating_for_service__c	Text(1)		
Service Amount	Service_Amount__c	Currency(18, 0)		
Service records	Service_records__c	Lookup(Service records)		✓

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

Scoping Rules

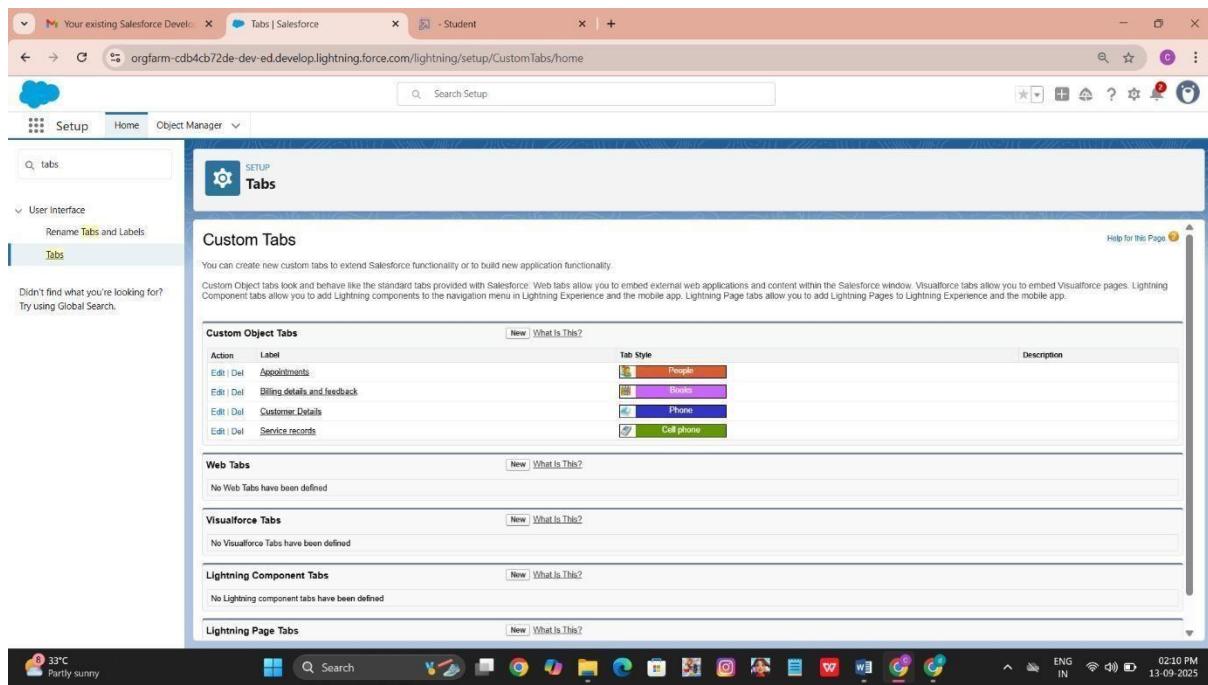
Object Access

Triggers

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Search

01:54 PM 13-09-2025



- Creating tabs: Customer Details, Appointment, Service records, Billing details and feedback
- Developed Lightning App with relevant tabs z

Screenshot of the Salesforce Lightning App Builder interface showing the configuration of the "Garage Management System" app.

The left sidebar shows the navigation menu:

- App Settings
- App Details & Branding**
- App Options
- Utility Items (Desktop Only)
- Navigation Items
- User Profiles

The main content area is titled "App Details & Branding". It includes the following sections:

- App Details**: Fields for "App Name" (Garage Management System) and "Developer Name" (Garage\_Management\_System).
- App Branding**: Fields for "Image" (a small thumbnail of a car), "Primary Color Hex Value" (#062722), and a checkbox for "Org Theme Options" (unchecked).
- App Launcher Preview**: A preview window showing the app icon and name.

At the bottom right of the screen, there is a Windows taskbar with various pinned icons and system status indicators.

The screenshot shows the 'Navigation Items' section of the Lightning App Builder. On the left, a sidebar lists 'App Settings', 'App Details & Branding', 'App Options', 'Utility Items (Desktop Only)', and 'Navigation Items'. The 'Navigation Items' tab is selected. The main area is titled 'Navigation Items' and contains a note: '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.' Below this is a 'Available Items' list and a 'Selected Items' list. The 'Available Items' list includes: Accounts, Activation Targets, Activations, All Sites, Alternative Payment Methods, Analytics, App Launcher, Appointment Categories, Appointment Invitations, Approval Requests, Approval Submission Details, Approval Submissions, Customer Details, Appointments, Service records, Billing details and feedback, Reports, and Dashboards. The 'Selected Items' list contains: Customer Details, Appointments, Service records, Billing details and feedback, Reports, and Dashboards. Navigation arrows between the two lists allow items to be moved.

The screenshot shows the 'User Profiles' section of the Lightning App Builder. On the left, a sidebar lists 'App Settings', 'App Details & Branding', 'App Options', 'Utility Items (Desktop Only)', 'Navigation Items', and 'User Profiles'. The 'User Profiles' tab is selected. The main area is titled 'User Profiles' and contains a note: 'Choose the user profiles that can access this app.' Below this is a 'Available Profiles' list and a 'Selected Profiles' list. The 'Available Profiles' list includes: Analytics Cloud Integration User, Anypoint Integration, Authenticated Website, Authenticated Website, B2B Reordering Portal Buyer Profile, Contract Manager, Custom: Marketing Profile, Custom: Sales Profile, Custom: Support Profile, Customer Community Login User, Customer Community Plus Login User, and Customer Community Plus User. The 'Selected Profiles' list contains: System Administrator, Manager, and sales person. Navigation arrows between the two lists allow profiles to be moved.



- Creation of fields for the Customer Details object

For lookup field:

The screenshot shows the Salesforce Object Manager interface. A modal window titled "Object Manager" is open, showing the "Data Type" section. The "Phone" option is selected. The interface includes a toolbar at the top with tabs like Setup, Home, and Object Manager.

**Data Type**

- None Selected
- Auto Number
- Checkbox
- Currency
- Date
- DateTime
- Email
- Number
- Percent
- Phone**
- Picklist
- Picklist (Multi-Select)
- Text
- Text Area
- Text Area (Long)
- Time
- URL

Helpful descriptions for each data type are listed below the selection:

- None Selected: Select one of the data types below.
- Auto Number: A system-generated sequence number that uses a display format you define. The number is automatically incremented for each new record.
- Checkbox: Allows users to select a True (checked) or False (unchecked) value.
- 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.
- Date: Allows users to enter a date or pick a date from a pop-up calendar.
- DateTime: Allows users to enter a date and time, or pick a date from a pop-up calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
- 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 Send an Email. Note that custom email addresses cannot be used for mass emails.
- Number: Allows users to enter any number. Leading zeros are removed.
- Percent: Allows users to enter a percentage number, for example, "10" and automatically adds the percent sign to the number.
- Phone: Allows users to enter any phone number. Automatically formats it as a phone number.
- Picklist: Allows users to select a value from a list you define.
- Picklist (Multi-Select): Allows users to select multiple values from a list you define.
- Text: Allows users to enter any combination of letters and numbers.
- Text Area: Allows users to enter up to 255 characters on separate lines.
- Text Area (Long): Allows users to enter up to 131,072 characters on separate lines.
- Time: Allows users to enter a local time. For example, "2:40 PM", "14:40", "14:40:00", and "14:40:50 500" are all valid times for this field.
- URL: Allows users to enter any valid website address. When users click on the field, the URL will open in a separate browser window.

The screenshot shows the "Edit Customer Details Custom Field" page. The field name is "Phone number". The "Field Label" is "Phone number". The "Field Name" is "Phone\_number". The "Default Value" is "Show Formula Editor". The "Required" checkbox is not checked. The interface includes a toolbar at the top with tabs like Setup, Home, and Object Manager.

Step 2. Enter the details Step 2 of 3

Field Label:  [i]

Field Name:  [i]

Description:

Help Text:

Required:  Always require a value in this field in order to save a record

Default Value:

Use formula syntax. Enclose text and picklist value API names in double quotes ("Name\_Text"), include numbers without quotes ("25"), show percentages as decimal (.10), and express date calculations in the standard format (Today() + 7). To reference a field from a Custom Metadata type record use @CustomMetadataTypeRecordName@Field\_\_c

Previous Save Next Cancel

**Step 1. Choose the field type**

Specify the type of information that the custom field will contain.

**Data Type**

None Selected

Lookup Relationship

Master-Detail Relationship

Select one of the data types below:

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.

- 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 roll-up 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.

**Step 1**

[Next](#) [Cancel](#)

**Step 2. Enter the label and name for the lookup field**

Field Label: Customer Details

Field Name: Customer\_Details

Description:

Help Text:

Child Relationship Name: Appointments

Required:

- Always require a value in this field in order to save a record
- Clear the value of this field. You can't choose this option if you make this field required.
- Don't allow deletion of the lookup record that's part of a lookup relationship.

What to do if the lookup record is deleted?

Lookup Filter

Optional: create a filter to limit the records available to users in the lookup field. [Tell me more!](#)

[Show Filter Settings](#)

**Step 2 of 4**

[Previous](#) [Save](#) [Next](#) [Cancel](#)

The screenshot shows the Salesforce Object Manager interface for the 'Appointment' object. On the left, a sidebar lists various setup options like Details, Fields & Relationships, Page Layouts, and Triggers. The main area is titled 'Fields & Relationships' and displays 13 items, sorted by Field Label. Each item shows the field name, its label, and its type. For example, 'Appointment Date' is a Date field labeled 'Appointment\_Date\_\_c'. Other fields include 'Appointment Name' (Name), 'Created By' (Lookup(User)), 'Customer Details' (Lookup(Customer Details)), 'Customer Name' (Text(10)), 'Last Modified By' (Lookup(User)), 'Maintenance service' (Checkbox), 'Owner' (Lookup(User/Group)), 'Payment Paid' (Currency(18, 0)), 'Repairs' (Checkbox), 'Replacement Parts' (Checkbox), and 'Service Amount' (Currency(18, 0)). A toolbar at the top provides search, new record, deleted fields, field dependencies, and history tracking options.

- create a validation rule to an Appointment Object

The screenshot shows the Salesforce Validation Rules editor for the 'Appointment' object. The 'Rule Name' is set to 'Vehicle'. The 'Active' checkbox is checked. The 'Error Condition Formula' field contains the formula: `NOT ISBLANK( Vehicle\_number\_plate\_\_c ) , "[A-Z]{2}{0-9}{2}{A-Z}{2}{0-9}{4}{[!]}\*")` . The 'Functions' dropdown menu is open, showing various mathematical and string functions like ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, etc. The 'Error Message' field contains the message: 'Please enter valid number.' The interface includes a 'Check Syntax' button and a 'Help on this function' link. A 'Quick Tips' panel on the right suggests operators and functions.

Your existing Salesforce Development Environment - Student

Appointment | Salesforce

orgfarm-cdb4cb72de-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgL000001wHfp/ValidationRules/03dgL000000OXKb/edit

Setup Home Object Manager

SETUP > OBJECT MANAGER Appointment

**Error Condition Formula**

Example: [Discount\_Percent >= 30] More Examples...  
Display an error if Discount is more than 30%  
If this formula expression is true, display the text defined in the Error Message area

Insert Field Insert Operator NOT (REGEX( Vehicle\_number\_plate\_\_c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}") )

Functions  
All Function Categories ABS ACOS ADDMONTHS AND ASCII ASIN

Check Syntax Help on this function

**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

Save Save & New Cancel

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 Scoping Rules Object Access Triggers

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Billing details and feedback | Salesforce

orgfarm-cdb4cb72de-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgL000001wHmH/ValidationRules/03dgL000000OXMD/edit

Setup Home Object Manager

SETUP > OBJECT MANAGER Billing details and feedback

**Quick Tips**  
Operators & Functions

**Validation Rule**

Name rating\_should\_be\_less\_than\_5 Active Description

**Error Condition Formula**

Example: [Discount\_Percent >= 30] More Examples...  
Display an error if Discount is more than 30%  
If this formula expression is true, display the text defined in the Error Message area

Insert Field Insert Operator NOT (REGEX( Rating\_for\_service\_\_c , "[1-5](1)") )

Functions  
All Function Categories ABS ACOS ADDMONTHS AND ASCII ASIN

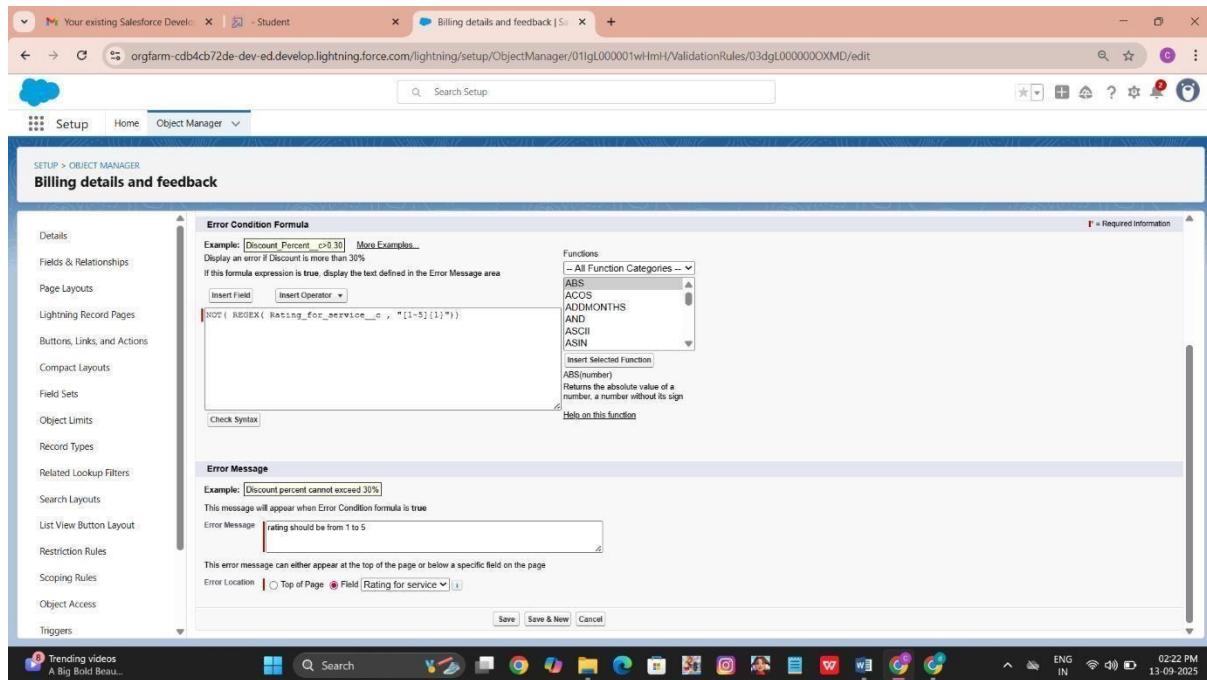
Check Syntax Help on this function

**Error Message**

Example: [Discount percent cannot exceed 30%]  
This message will appear when Error Condition formula is true  
Error Message rating should be from 1 to 5

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 Scoping Rules Object Access Triggers

02:22 PM 13-09-2025



## Duplicate rule

- To create a matching rule to an Customer details Object

Matching Rule Detail	
Object	Customer Details
Rule Name	Matching customer details
Unique Name	Matching_customer_details
Description	
Matching Criteria	(Customer_Details: Email EXACT MatchBlank = FALSE) AND (Customer_Details: Phone_number EXACT MatchBlank = FALSE)
Status	Active
Created By	Catherine Shobya L 9/3/2025, 2:51 AM
Modified By	Catherine Shobya L 9/3/2025, 2:51 AM

- create a Duplicate rule to an Customer details Object,

The screenshot shows the 'Duplicate Rules' setup page in Salesforce. A new rule is being created with the following details:

- Rule Name:** Customer Detail duplicate
- Description:** Customer Details
- Object:** Customer Details
- Record Level Security:** Enforce sharing rules
- Actions:**
  - Action On Create: Allow, Alert, Report
  - Action On Edit: Allow, Alert, Report
  - Alert Text: Use one of these records?
- Matching Rules:**
  - Compare Customer Details With: Matching customer details
  - Matching Rule: (Customer Details: Email EXACT MatchBlank = FALSE) AND (Customer Details: Phone\_number EXACT MatchBlank = FALSE)
  - Matching Criteria: Mapping Selected

The second screenshot shows the 'Customer Detail duplicate' rule detail page, confirming the rule's configuration.

## Profiles Manager

Profile,

Your existing Salesforce Development Environment | Profiles | Salesforce

orgfarm-cdb4cb72de-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00egL000004Nih%2Fe%3FretURL%3D%252F00e%253Ffd%253D00BgL00000G7m...

Setup Home Object Manager

Search Setup

Cloud icon

Profiles

Name: Manager  
User License: Salesforce  
Description: [Empty]

Custom Profile:

Custom App Settings

	Visible	Default	Visible	Default	
All Tabs (standard__AltTabSet)	<input checked="" type="checkbox"/>	<input type="radio"/>	My Service Journey (standard__MSJApp)	<input checked="" type="checkbox"/>	<input type="radio"/>
Analytics Studio (standard__Insights)	<input checked="" type="checkbox"/>	<input type="radio"/>	Queue Management (standard__QueueManagement)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard__Applauncher)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Approvals (standard__Approvals)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales (standard__Sales)	<input checked="" type="checkbox"/>	<input type="radio"/>
Automation (standard__FlowApp)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Cloud Mobile (standard__SalesCloudMobile)	<input checked="" type="checkbox"/>	<input type="radio"/>
Bolt Solutions (standard__lightningBolt)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sales Console (standard__SalesConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Community (standard__Community)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce Chatter (standard__Chatter)	<input checked="" type="checkbox"/>	<input type="radio"/>
Content (standard__Content)	<input checked="" type="checkbox"/>	<input type="radio"/>	Salesforce e-Scheduler Setup (standard__lightningScheduler)	<input type="checkbox"/>	<input type="radio"/>
Data Cloud (standard__Audience360)	<input checked="" type="checkbox"/>	<input type="radio"/>	Sample Console (standard__ServiceConsole)	<input type="checkbox"/>	<input type="radio"/>
Data Manager (standard__DataManager)	<input checked="" type="checkbox"/>	<input type="radio"/>	Service (standard__Service)	<input checked="" type="checkbox"/>	<input type="radio"/>
Digital Experiences (standard__SalesforceCMS)	<input checked="" type="checkbox"/>	<input type="radio"/>	Site.com (standard__Sites)	<input checked="" type="checkbox"/>	<input type="radio"/>
Garage Management Application (GarageManagementApplication)	<input type="checkbox"/>	<input type="radio"/>	Subscription Management (standard__RevenueCloudConsole)	<input checked="" type="checkbox"/>	<input type="radio"/>
Garage Management System (GarageManagementSystem)	<input type="checkbox"/>	<input checked="" type="radio"/>	WVY (standard__Work)	<input type="checkbox"/>	<input type="radio"/>
Lightning Experience App	<input type="checkbox"/>	<input checked="" type="radio"/>			

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Search

Cloud icon

Profiles

Name: Manager  
User License: Salesforce  
Description: [Empty]

Custom Profile:

Tab Settings

Overwrite users' personal tab customizations:

Standard Tab Settings

Home	Default On
Accounts	<input checked="" type="checkbox"/>
Activations	<input checked="" type="checkbox"/>
Activation Targets	<input checked="" type="checkbox"/>
All Sites	<input checked="" type="checkbox"/>
Alternative Payment Methods	<input checked="" type="checkbox"/>
Analytics	<input checked="" type="checkbox"/>
Analytics	<input checked="" type="checkbox"/>
App Launcher	<input checked="" type="checkbox"/>
Appointment Categories	<input checked="" type="checkbox"/>
Appointment Invitations	<input checked="" type="checkbox"/>
Approval Requests	<input checked="" type="checkbox"/>
Approval Submission Details	<input checked="" type="checkbox"/>
Approval Submissions	<input checked="" type="checkbox"/>
Approve Work Items	<input checked="" type="checkbox"/>
Asset Actions	<input checked="" type="checkbox"/>
Asset Action Sources	<input checked="" type="checkbox"/>
Assets	<input checked="" type="checkbox"/>
Asset State Periods	<input checked="" type="checkbox"/>
Async Operation Logs	<input checked="" type="checkbox"/>
Authorization Form	<input checked="" type="checkbox"/>

Inventory Count Plan Items	<input checked="" type="checkbox"/>
Inventory Count Product Batch Items	<input checked="" type="checkbox"/>
Inventory Item Reservations	<input checked="" type="checkbox"/>
Inventory Operations	<input checked="" type="checkbox"/>
Inventory Reservations	<input checked="" type="checkbox"/>
Invoices	<input checked="" type="checkbox"/>
IT Services Configured Items	<input checked="" type="checkbox"/>
Journey Home	<input checked="" type="checkbox"/>
Journey Map	<input checked="" type="checkbox"/>
Labels	<input checked="" type="checkbox"/>
Leads	<input checked="" type="checkbox"/>
Legal Entities	<input checked="" type="checkbox"/>
Libraries	<input checked="" type="checkbox"/>
Lightning Bolt Solutions	<input checked="" type="checkbox"/>
Lightning Usage	<input checked="" type="checkbox"/>
List Emails	<input checked="" type="checkbox"/>
Location Groups	<input checked="" type="checkbox"/>
Locations	<input checked="" type="checkbox"/>
Location Shipping Carrier Methods	<input checked="" type="checkbox"/>
Macros	<input checked="" type="checkbox"/>
Merge Requests	<input checked="" type="checkbox"/>

33°C Partly sunny

Search

Cloud icon

Profiles

Name: Manager  
User License: Salesforce  
Description: [Empty]

Custom Profile:

Your existing Salesforce Development Environment | Profiles | Salesforce

orgfarm-cdb4cb72de-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00egL000004Nih%2Fe%3fretURL%3D%252F00e%253Ffc%253D00BgL00000G7m...

Setup Home Object Manager

Search Setup

profil

Users Profiles

**Standard Object Permissions**

The permissions defined here control access at the object level. Access to individual records within that object type is controlled by the sharing model. Set access levels based on the functional requirements for the profile. For example, create different groups of permissions for individual contributors, managers, and administrators. [How do I choose?](#)

	Basic Access						Data Administration							
	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields	Read	Create	Edit	Delete	View All Records	Modify All Records	View All Fields
Accounts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>									
Activation Attribute	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activation Contact Point	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activation Contact Point Field	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activation Contact Point Source	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activation Data Model Field	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activation Data Source	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activation Definition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activation Platforms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activation Platform Activation Attributes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activation Platform Audience Identifiers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activation Platform Data Connector for S3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activation Platform Fields	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activation Platform Field Values	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Activation Platform Field Value Definitions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Share Target Definition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Share Target Definition Maps	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Sources	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Source Bundles	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Source Data Model Field Mappings	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Source Fields	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Source Objects	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Source Parameters	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Source Tenants	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Streams	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Stream Definitions	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Stream Templates	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Stream Template Connection Parameters	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Data Tag Detection Configurations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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Search

Setup Home Object Manager

profil

Users Profiles

**Custom Object Permissions**

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

**Session Settings**

Session Times Out After: 8 hours of inactivity

Session Security Level Required at Login: None

**Password Policies**

User passwords expire in: Never expires

Enforce password history: 3 passwords remembered

Minimum password length: 8

Password complexity requirement: Must include alpha and numeric characters

Password question requirement: Cannot contain password

Maximum invalid login attempts: 10

Lockout effective period: 15 minutes

Obscure secret answer for password resets:

Require a minimum 1 day password lifetime:

Don't immediately expire links in forgot password emails:

Save Save & New Cancel

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Search

Setup Home Object Manager

profil

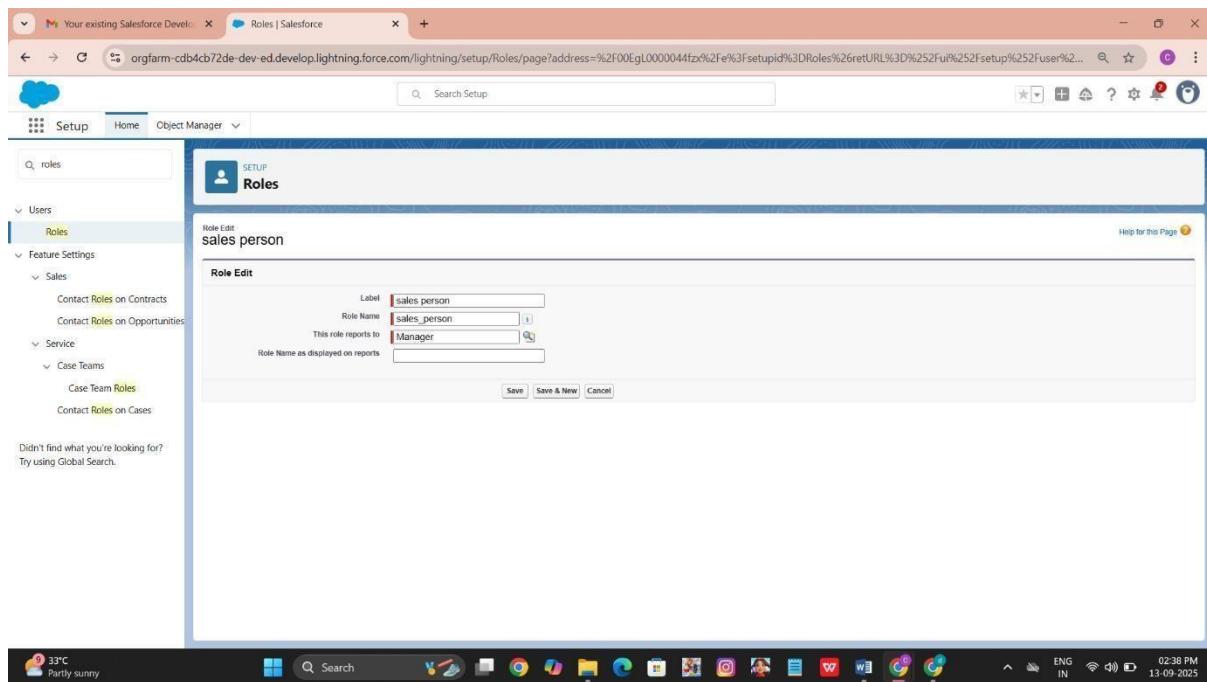
## Role & Role Hierarchy

The screenshot shows the 'Roles' page in the Salesforce Setup. On the left, a sidebar lists categories like Users, Feature Settings, Sales, Service, and Case Teams. The 'Roles' section is selected. The main content area displays a 'Sample Role Hierarchy' diagram. At the top is 'Executive Staff' with 'CEO, President' and 'CFO, VP, Sales'. Arrows point down to 'Western Sales Director' and 'Eastern Sales Director', both under 'Sales'. These further point to 'Western Sales Rep', 'CA Sales Rep', 'OR Sales Rep' under Western, and 'Eastern Sales Rep', 'NY Sales Rep', 'MA Sales Rep' under Eastern. Finally, 'International Sales Rep' points to 'Asian Sales Rep' and 'European Sales Rep'. A legend on the right describes the permissions: 'View & edit data, roll up & generate reports for all users below' and 'Can access data of other Executive Staff'. A 'Set Up Roles' button and a 'Don't show this page again' checkbox are at the bottom.

- Creating Manager Role,

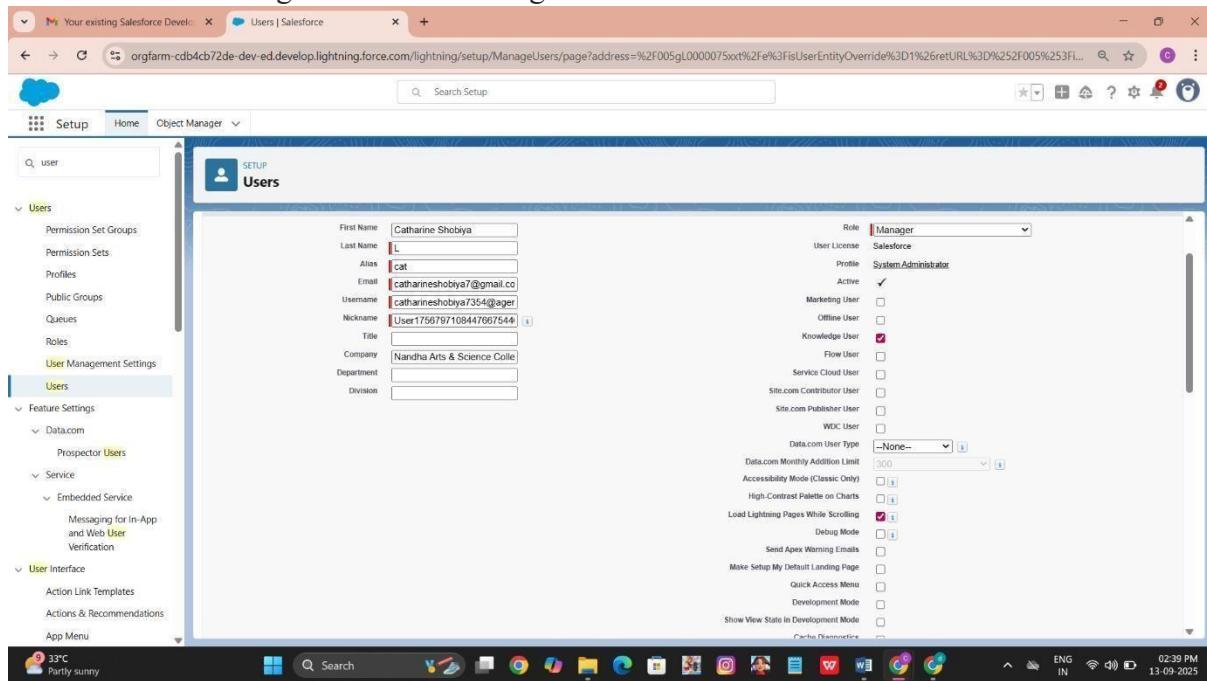
- Creating Sales person Role,

The screenshot shows the 'Role Edit' page for creating a new role. The sidebar is identical to the previous screenshot. The main area is titled 'New Role' and contains a 'Role Edit' form. The 'Label' field is set to 'Manager', the 'Role Name' field is also 'Manager', and the 'This role reports to' dropdown is set to 'CEO'. A 'Role Name as displayed on reports' input field is empty. At the bottom are 'Save', 'Save & New', and 'Cancel' buttons. The status bar at the bottom indicates it's 02:37 PM on 13-09-2025.



## Users

- Create User assign the role as Manager



- Create User assign the role as sales person

Your existing Salesforce Developer

Users | Salesforce

orgfarm-cdb4cb72de-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005gL000007YX3f%2Fe%3FisUserEntityOverride%3D1%26retURL%3D%252F005%253F...

Setup Home Object Manager

Search Setup

User Edit Dhanusri V

User Edit General Information

First Name: Dhanusri  
Last Name: V  
Alias: dv  
Email: dhanusrid634@gmail.com  
Username: dhanusrid634@gmail.com  
Nickname: dhanu  
Title:   
Company:   
Department:   
Division:

Role: sales person  
User License: Salesforce Platform  
Profile: sales person  
Active:   
Marketing User:   
Offline User:   
Knowledge User:   
Flow User:   
Service Cloud User:   
Site.com Contributor User:   
Site.com Publisher User:   
WDC User:   
Data.com User Type:   
Data.com Monthly Addition Limit: 300  
Accessibility Mode (Classic Only):   
High-Contrast Palette on Charts:   
Load Lightning Pages While Scrolling:   
Debug Mode:   
Make Setup My Default Landing Page:

Help for this Page

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Search

02:40 PM 13-09-2025

Your existing Salesforce Developer

Users | Salesforce

orgfarm-cdb4cb72de-dev-ed.lightning.force.com/lightning/setup/ManageUsers/page?address=%2F005gL000007Drk1%2Fe%3FisUserEntityOverride%3D1%26retURL%3D%252F005%253F...

Setup Home Object Manager

Search Setup

User Edit Dhanalakshmi C

User Edit General Information

First Name: Dhanalakshmi  
Last Name: C  
Alias: CS  
Email: catherinehobby7@gmail.com  
Username: dhanalakshmi@agentforce.c  
Nickname: dhana  
Title:   
Company:   
Department:   
Division:

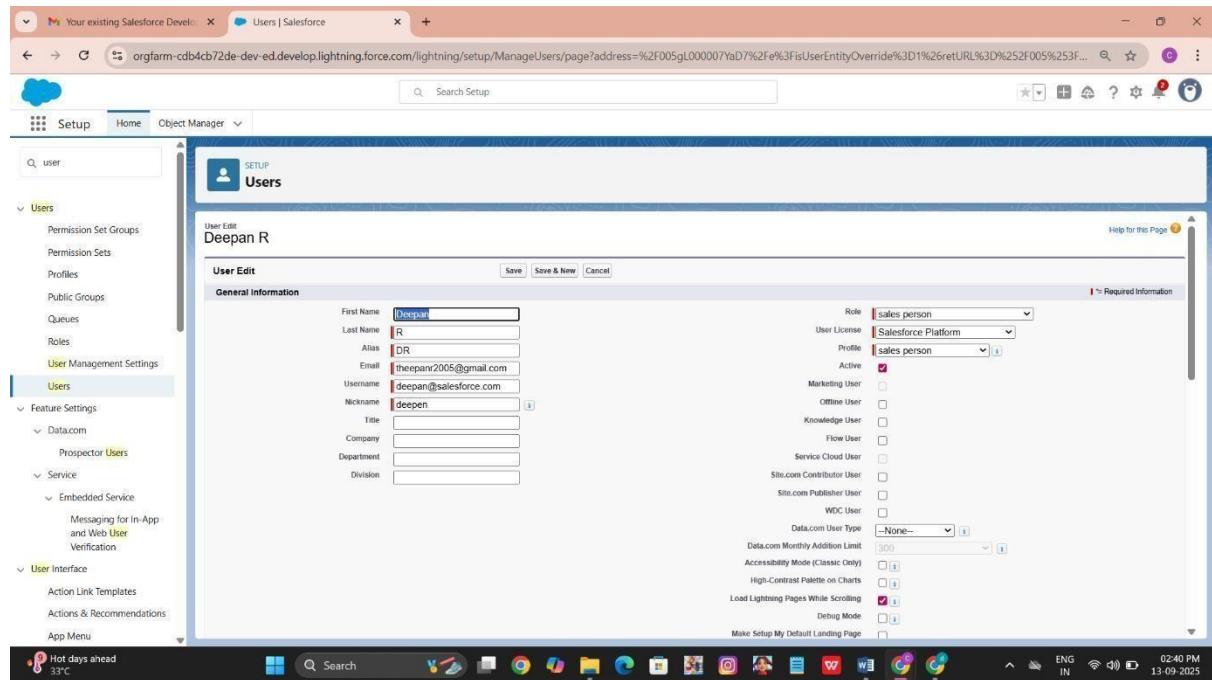
Role: sales person  
User License: Salesforce Platform  
Profile: sales person  
Active:   
Marketing User:   
Offline User:   
Knowledge User:   
Flow User:   
Service Cloud User:   
Site.com Contributor User:   
Site.com Publisher User:   
WDC User:   
Data.com User Type:   
Data.com Monthly Addition Limit: 300  
Accessibility Mode (Classic Only):   
High-Contrast Palette on Charts:   
Load Lightning Pages While Scrolling:   
Debug Mode:   
Make Setup My Default Landing Page:

Help for this Page

Hot days ahead  
33°C

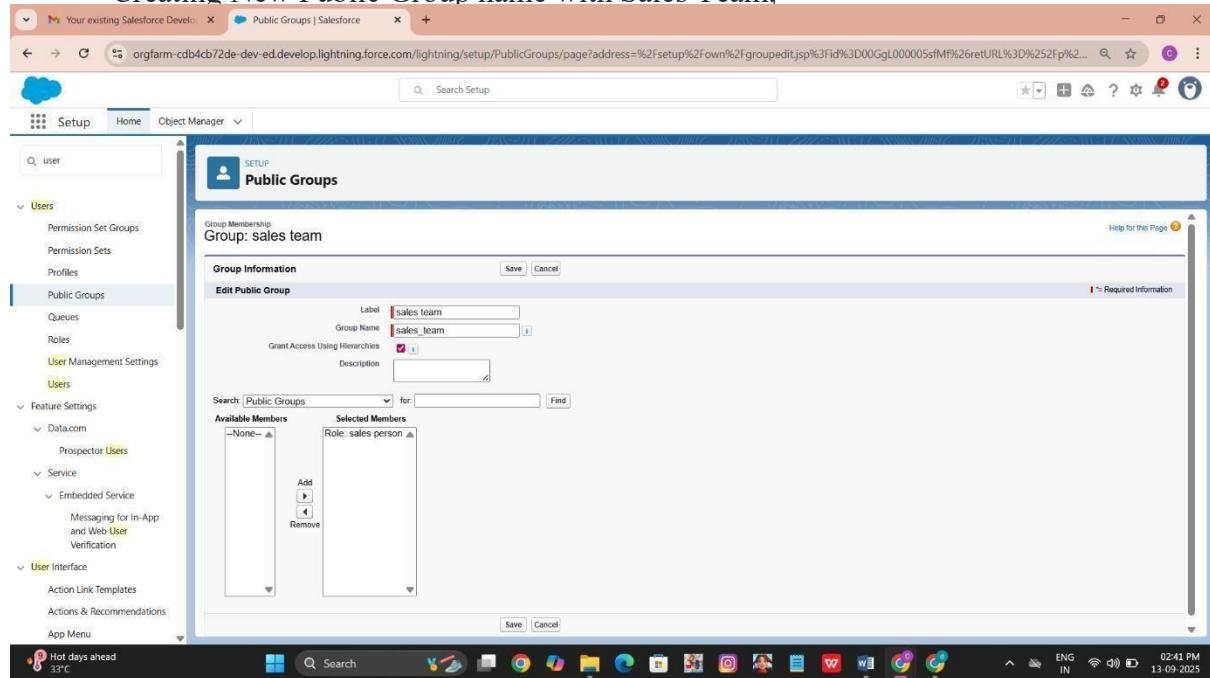
Search

02:40 PM 13-09-2025

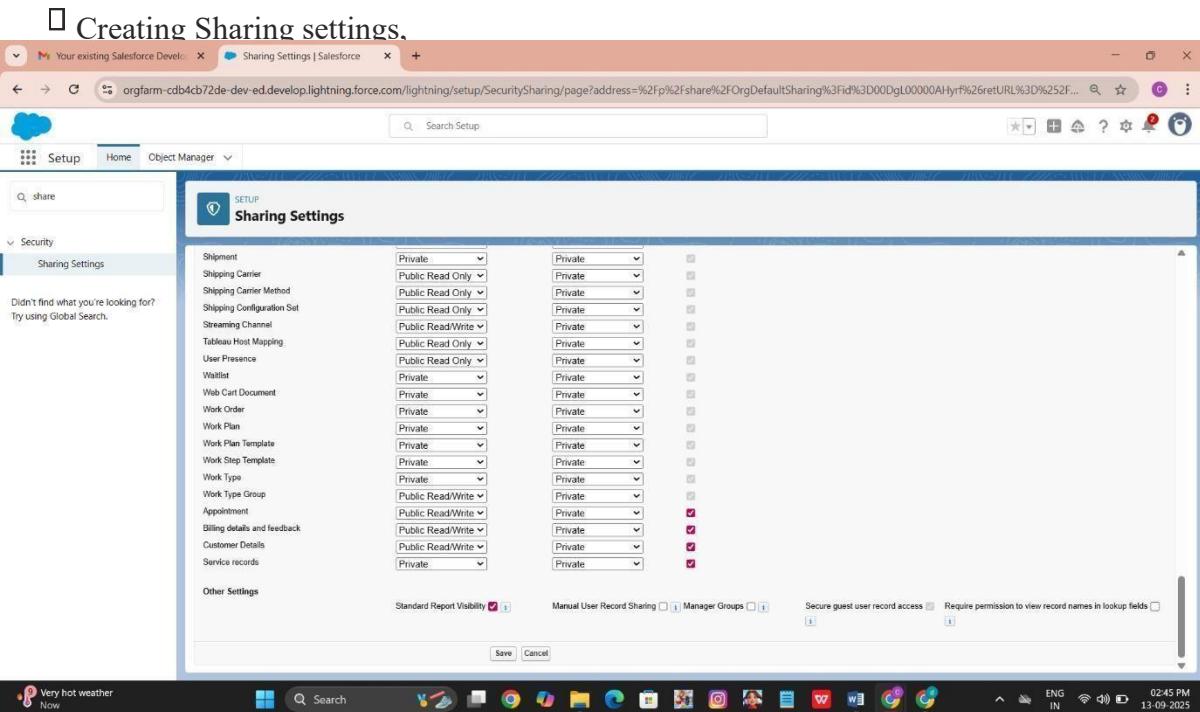


## Public groups

□ Creating New Public Group name with Sales Team,

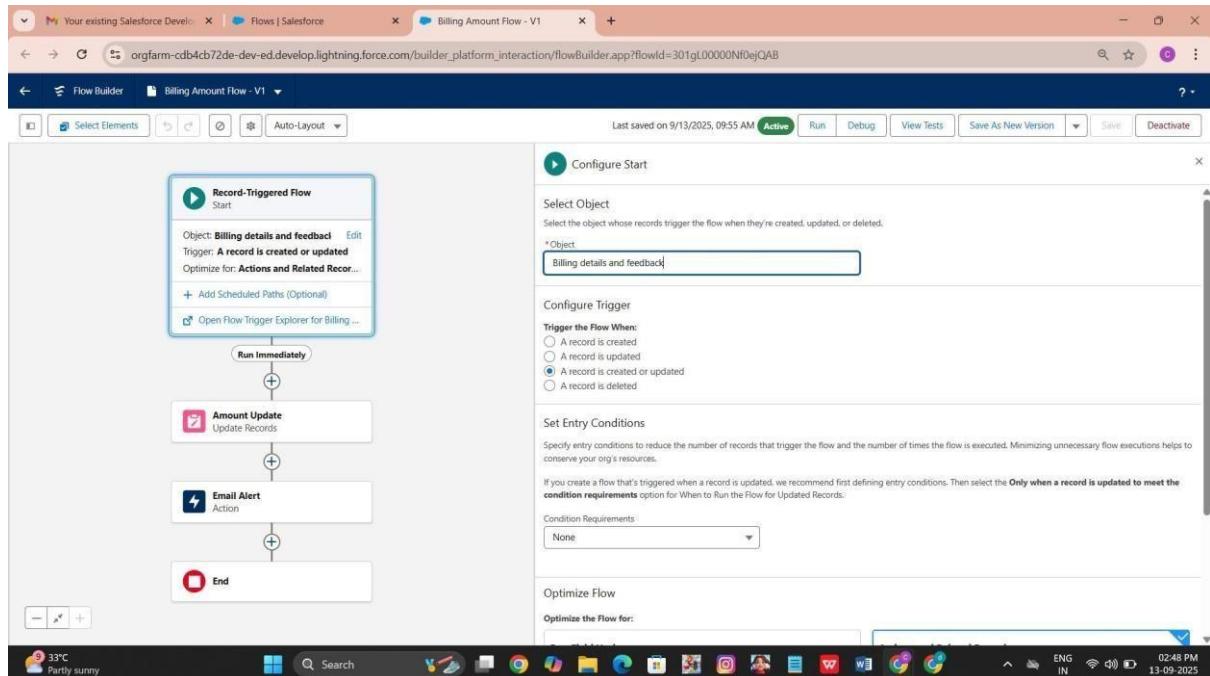


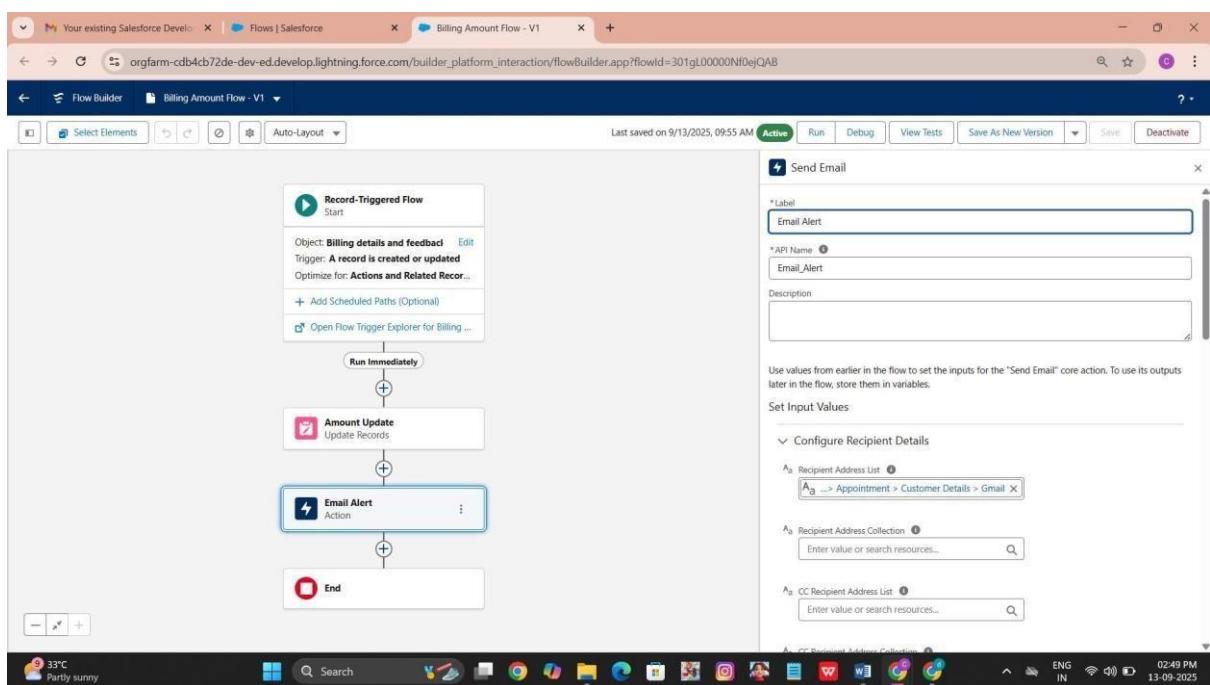
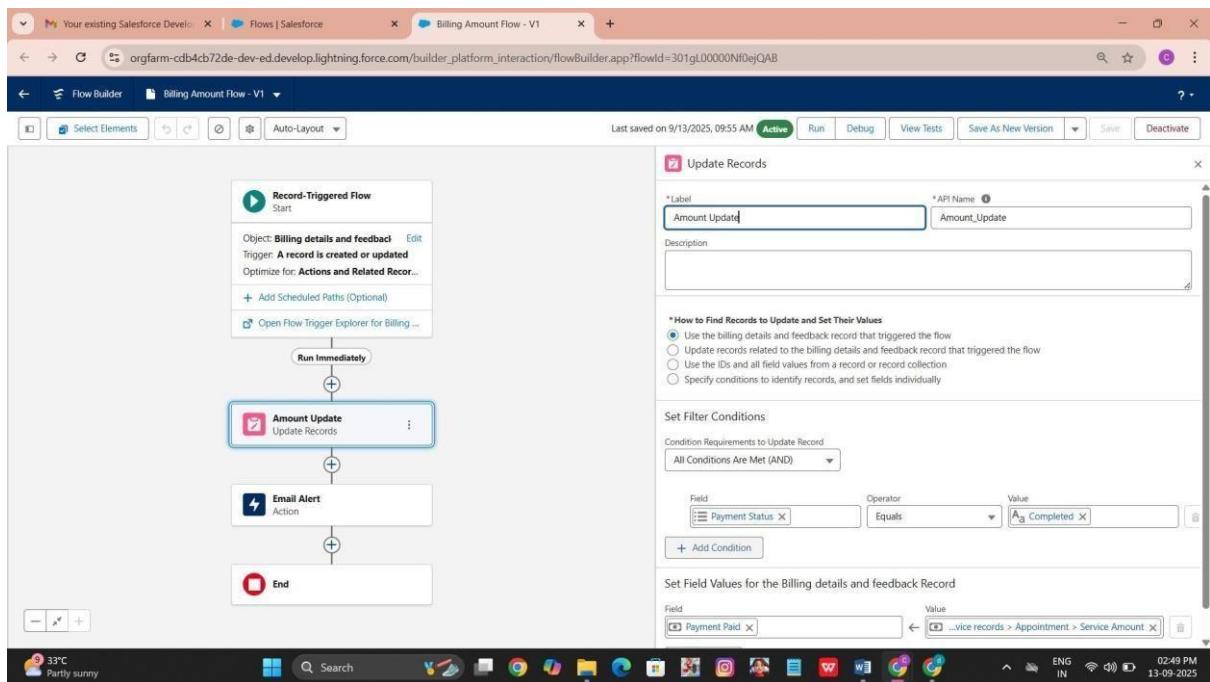
## Sharing Setting

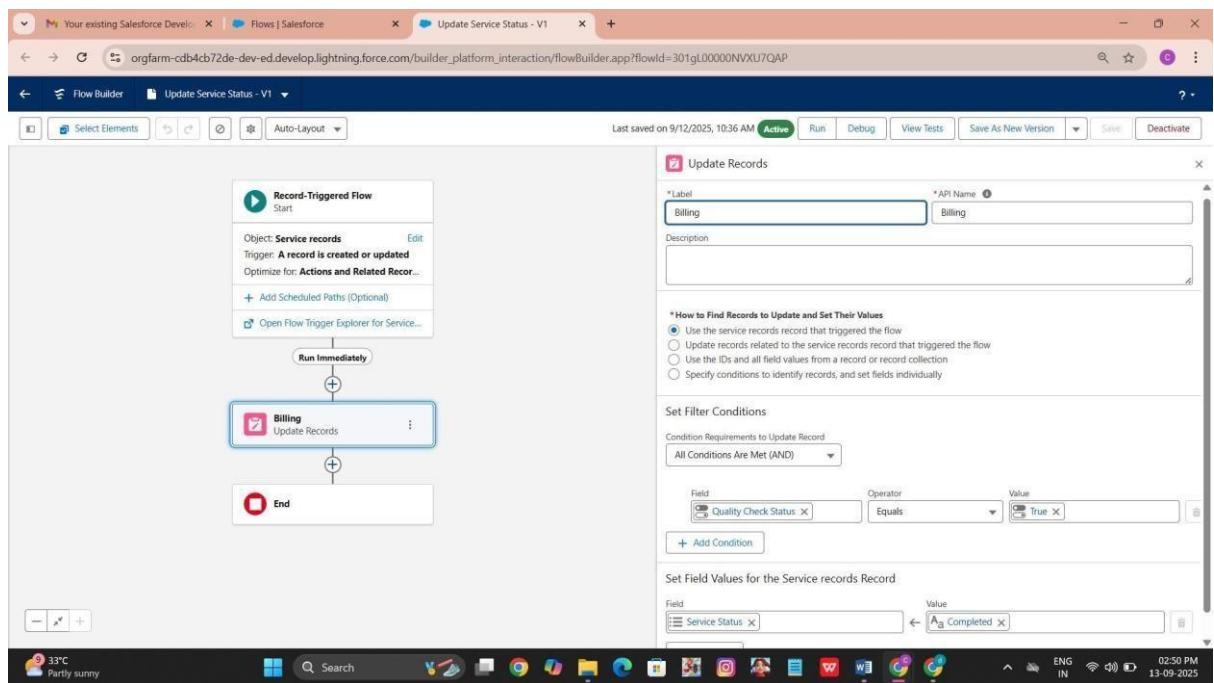
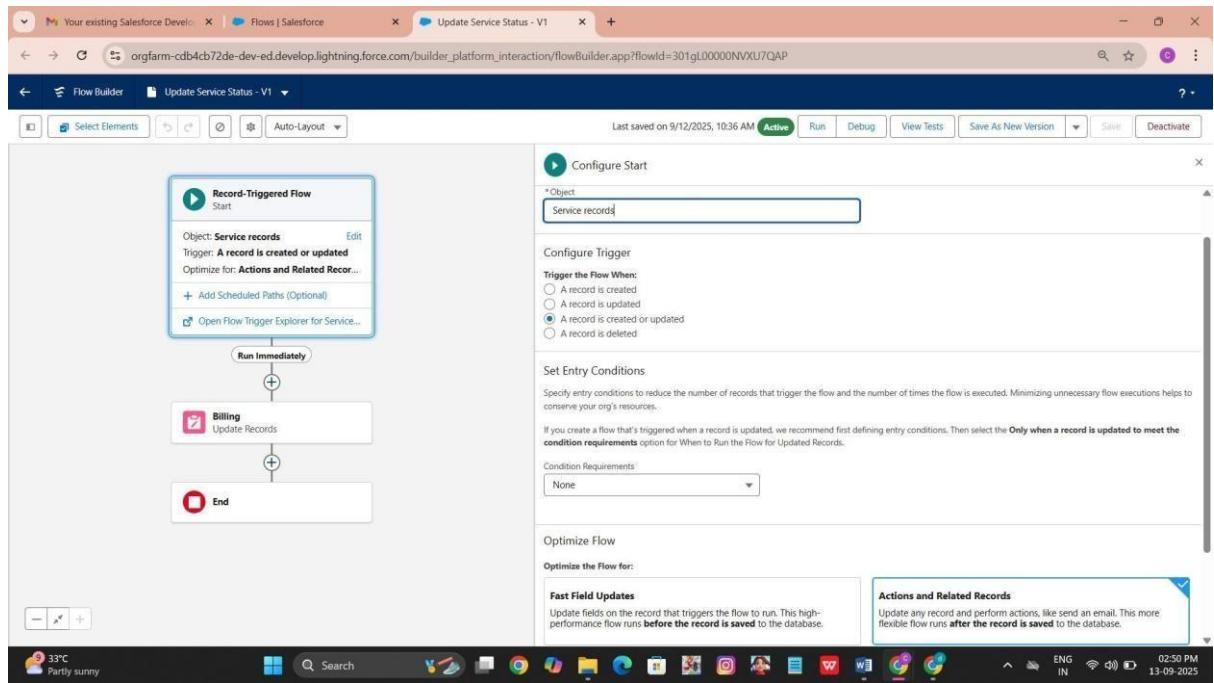


## Flows

- Create a flow for a Billing details and feedback,







## Apex Trigger Create an Apex Handler class

Handler class

```
1 * public class AmountDistributionHandler {  
2  
3  
4     public static void amountDist(list<Appointment__c> listApp){  
5         list<Service_records__c> serList = new list <Service_records__c>();  
6  
7         for(Appointment__c app : listApp){  
8             if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){  
9                 app.Service_Amount__c = 10000;  
10            }  
11            else if(app.Maintenance_service__c == true && app.Repairs__c == true){  
12                app.Service_Amount__c = 5000;  
13            }  
14            else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){  
15                app.Service_Amount__c = 8000;  
16            }  
17            else if(app.Repairs__c == true && app.Replacement_Parts__c == true){  
18                app.Service_Amount__c = 7000;  
19            }  
20            else if(app.Maintenance_service__c == true){  
21                app.Service_Amount__c = 2000;  
22            }  
23            else if(app.Repairs__c == true){  
24                app.Service_Amount__c = 3000;  
25            }  
26            else if(app.Replacement_Parts__c == true){  
27                app.Service_Amount__c = 4000;  
28            }  
29        }  
30    }  
31    else if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){  
32        app.Service_Amount__c = 10000;  
33    }  
34    else if(app.Repairs__c == true && app.Replacement_Parts__c == true){  
35        app.Service_Amount__c = 7000;  
36    }  
37    else if(app.Maintenance_service__c == true){  
38        app.Service_Amount__c = 2000;  
39    }  
40    else if(app.Repairs__c == true){  
41        app.Service_Amount__c = 3000;  
42    }  
43    else if(app.Replacement_Parts__c == true){  
44        app.Service_Amount__c = 4000;  
45    }  
46}
```

- Create an Apex Trigger

The screenshot shows the Salesforce Developer Console in Google Chrome. The URL is `orgfarm-5df1e805f3-dev-ed.develop.my.salesforce.com/ui/common/apex/debug/ApexCSIPage`. The tab bar has 'test.apex' selected. The code editor contains the following Apex code:

```

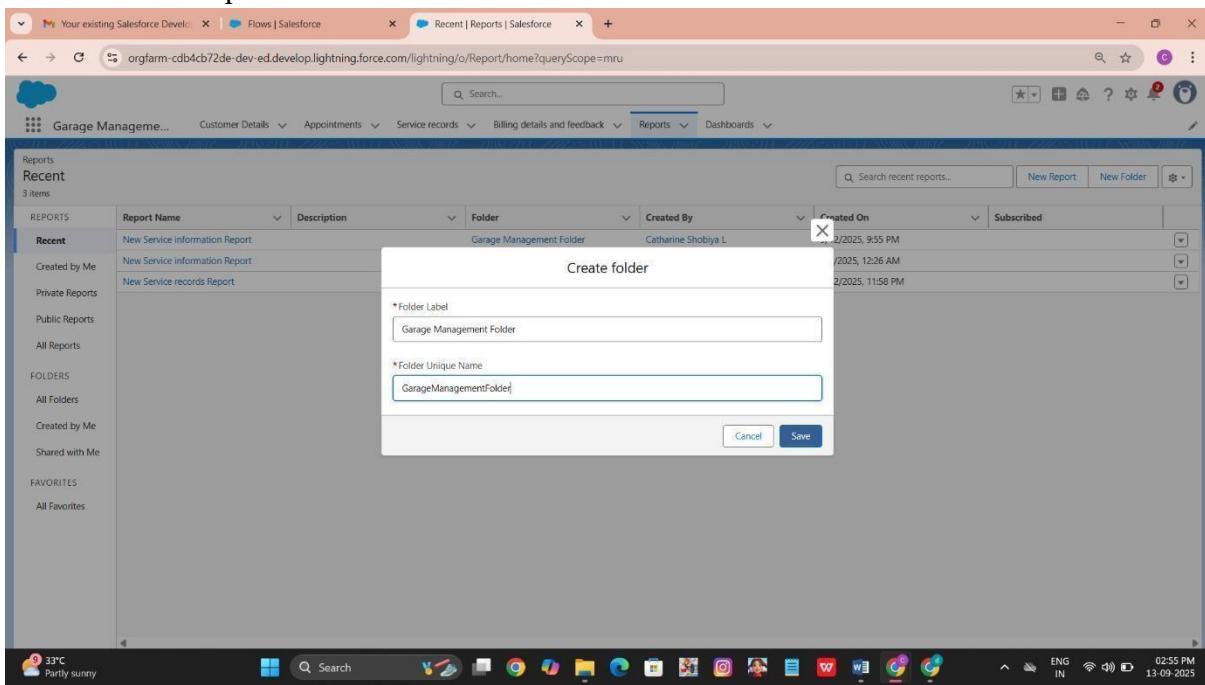
trigger test on Tenant__c (before insert)
{
    if(trigger.isInsert && trigger.isBefore){
        testHandler.preventInsert(trigger.new);
    }
}

```

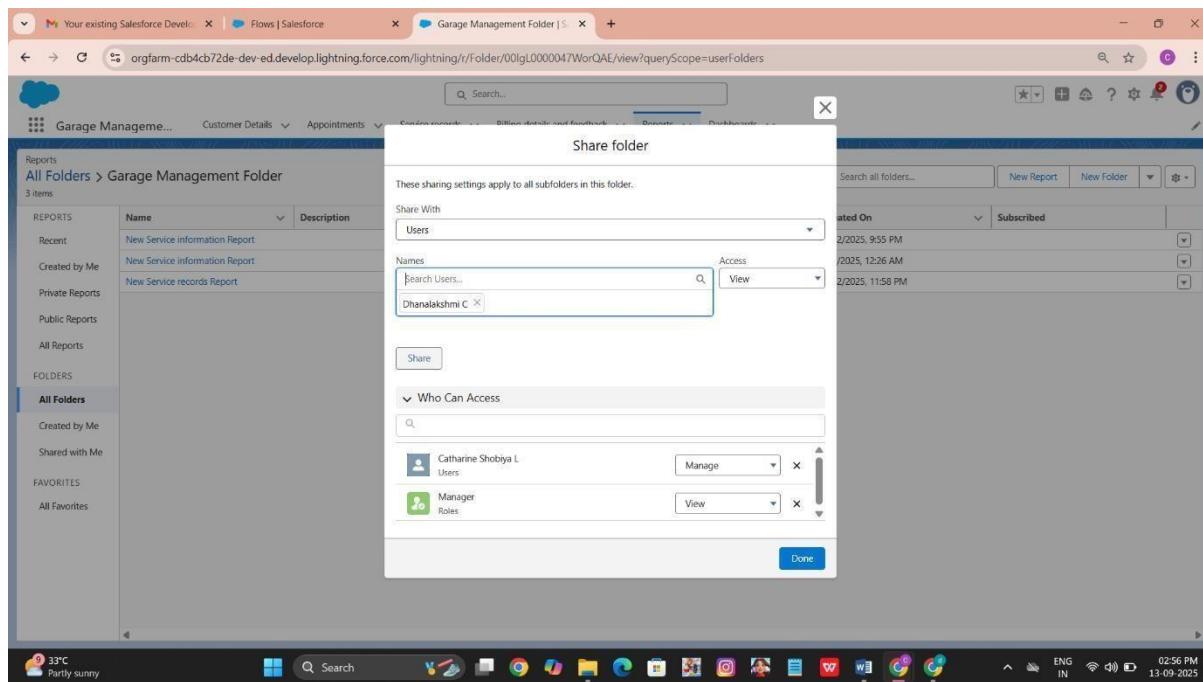
Below the code editor is a navigation bar with tabs: Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems. The 'Problems' tab is selected. The status bar at the bottom shows 'Name Line Problem'.

## Reports

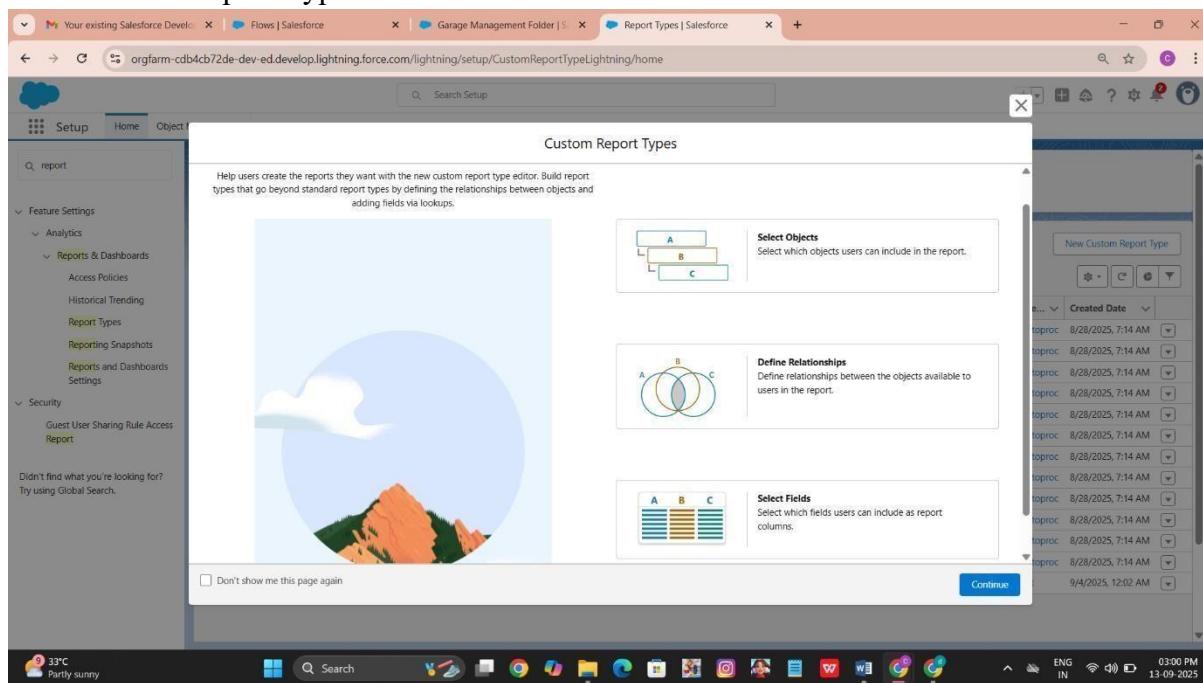
- create a report folder



- Sharing a report folder



- Create Report Type



The screenshot shows the Salesforce Setup interface for creating a report type. The left sidebar is collapsed, showing the 'report' search term. The main area is titled 'Service information' and displays a grid of fields categorized into four sections: Customer Details, Appointments, Service records, and Billing details and fees.

**Customer Details:**

- Customer Details ID
- Owner
- Customer Name
- Created Date
- Customer Details ID
- Customer Name
- Gmail
- Last Modified By
- Last Modified Date
- Last Modified By
- Phone number
- Gmail
- Created By

**Appointments:**

- Appointment ID
- Appointment Name
- Created Date
- Last Modified Date
- Last Modified By
- Appointment Date
- Appointment Name
- Created By

**Service records:**

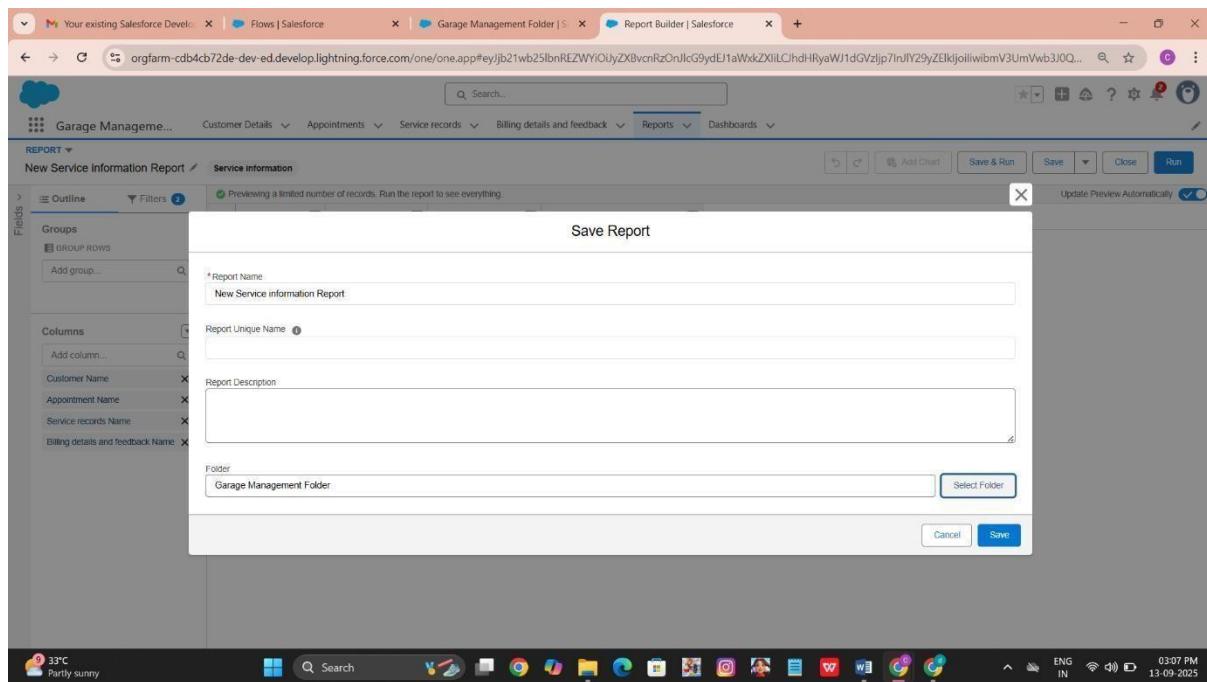
- Service records ID
- Owner
- Service records Name
- Created Date
- Created By
- Last Modified Date
- Last Modified By
- Appointment Date
- Maintenance service
- Repairs
- Replacement Parts
- Service Amount
- Payment Paid
- Vehicle number plate
- Customer Name

**Billing details and fees:**

- Billing details and fees ID
- Owner
- Billing details and fees Name
- Created Date
- Created By
- Last Modified Date
- Last Modified By
- Rating for service
- Payment Status
- Payment Paid
- Service Amount

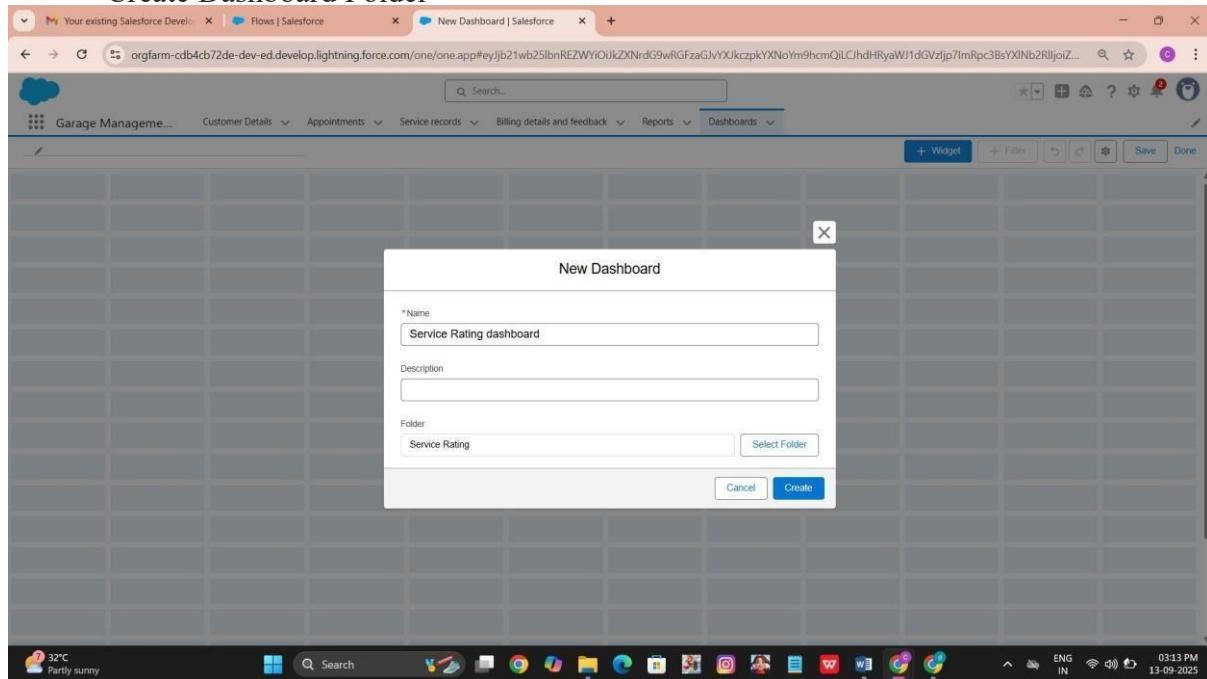
The bottom section shows the report's details and object relationships. The 'Details' section includes the display label 'Service information', API name 'Service\_information', description 'same', created by 'Catharine Shobiya L', deployment status 'Deployed', and modified by 'Catharine Shobiya L'. The 'Fields' section lists the source objects and included fields: Customer Details (9), Appointments (15), Service records (10), and Billing details and feedback (11). The 'Object Relationships' section shows a Venn diagram illustrating the relationships between Customer Details (A), Appointments (B), Service records (C), and Billing details and feedback (D).

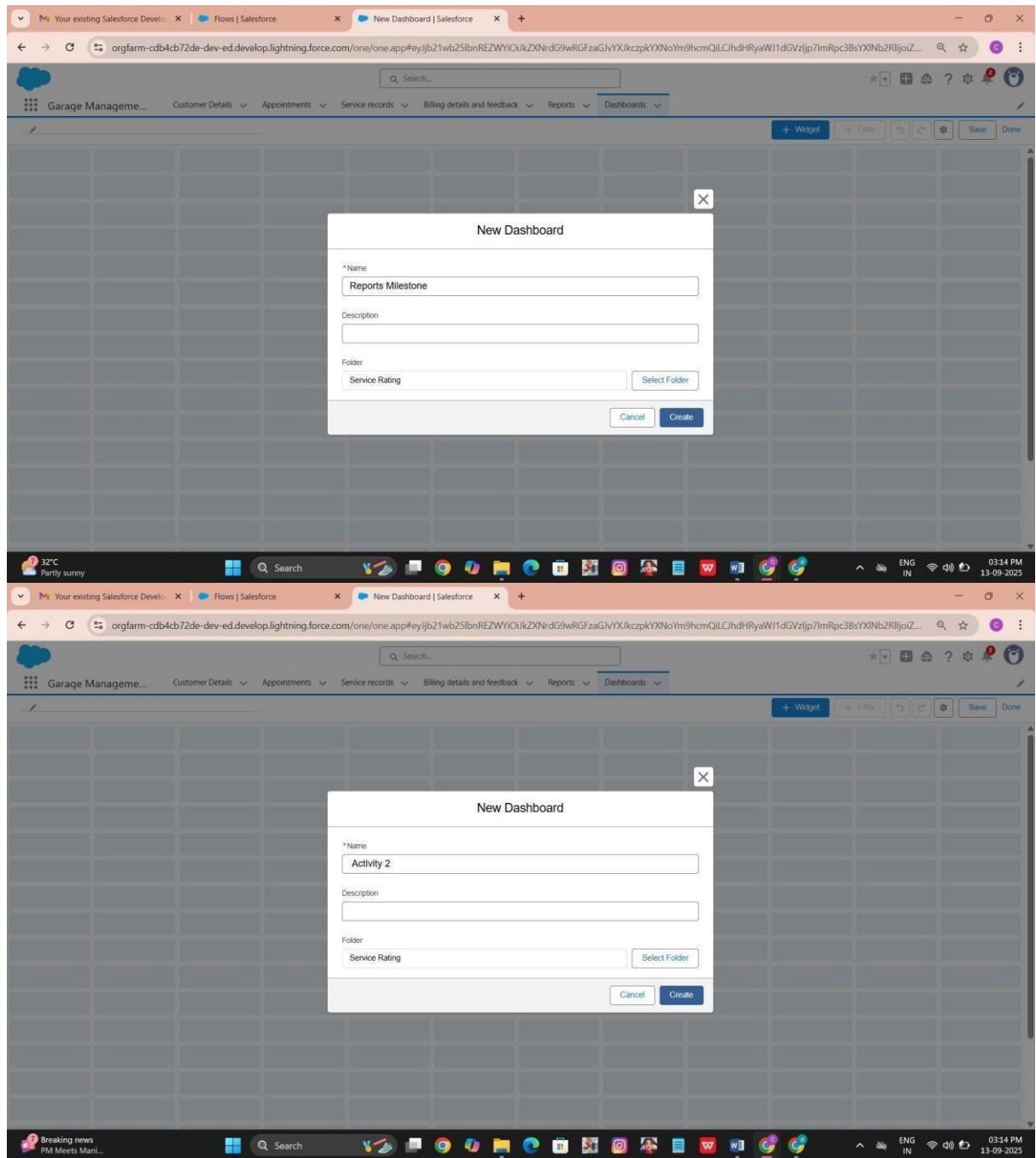
- Create Report



## Dashboards

### Create Dashboard Folder





## User Adoption □

creating records

Your existing Salesforce Development Environment | Flows | Salesforce | Edit Ben tennison | Salesforce | +

orgfarm-cdb4cb72de-dev-ed.lightning.force.com/lightning/r/Customer\_Details\_\_c/a00gL0000J1IKEQAZ/edit?navigationLocation=LIST\_VIEW\_ROW&count=1&backgroundContext=%2Flight... | Search... | Star | Close | More

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

Customer Details Recently Viewed

13 items • Updated a few seconds ago

Customer Name

- 1 Mac
- 2 John Doe
- 3 Kevin
- 4 Gwen tennison
- 5 Ben tennison
- 6 Doremom
- 7 Nobita
- 8 Nanaco
- 9 Hiroshi
- 10 Minsea
- 11 shiro
- 12 Shinchan
- 13 Himawari

Edit Ben tennison

\*Customer Name: Ben tennison

Owner: Catharine Shobiya L.

Phone number: 65742558

Gmail: ben@gmail.com

Created By: Catharine Shobiya L. 9/12/2025, 10:11 PM

Last Modified By: Catharine Shobiya L. 9/12/2025, 10:11 PM

New Import Change Owner Assign Label

Cancel Save & New Save

Heat warning In effect 02:16 PM 13-09-2025

This screenshot shows the Salesforce Lightning interface. A modal window titled 'Edit Ben tennison' is open, displaying a form with fields for Customer Name (Ben tennison), Owner (Catharine Shobiya L.), Phone number (65742558), and Gmail (ben@gmail.com). The modal also shows creation and modification history. The background shows a list of recently viewed customers and a navigation bar for Garage Management System.

Your existing Salesforce Development Environment | Flows | Salesforce | Edit app-009 | Salesforce | +

orgfarm-cdb4cb72de-dev-ed.lightning.force.com/lightning/r/Appointment\_c/a01gL0000NUzPQAV/edit?navigationLocation=LIST\_VIEW\_ROW&count=2&backgroundContext=%2Flight... | Search... | Star | Close | More

Garage Management System | Customer Details | Appointments

Appointments Recently Viewed

8 items • Updated a few seconds ago

Appointment Name

- 1 app-009
- 2 app-001
- 3 app-008
- 4 app-003
- 5 app-007
- 6 app-004
- 7 app-005
- 8 app-010

Edit app-009

Customer Details: Ben tennison

\*Appointment Date: 9/11/2025

Maintenance service: Repairs

Replacement Parts: \$2,000

\*Service Amount: \$1,000

\*Vehicle number plate: DL01ZZZ0001

\*Customer Name: Ben

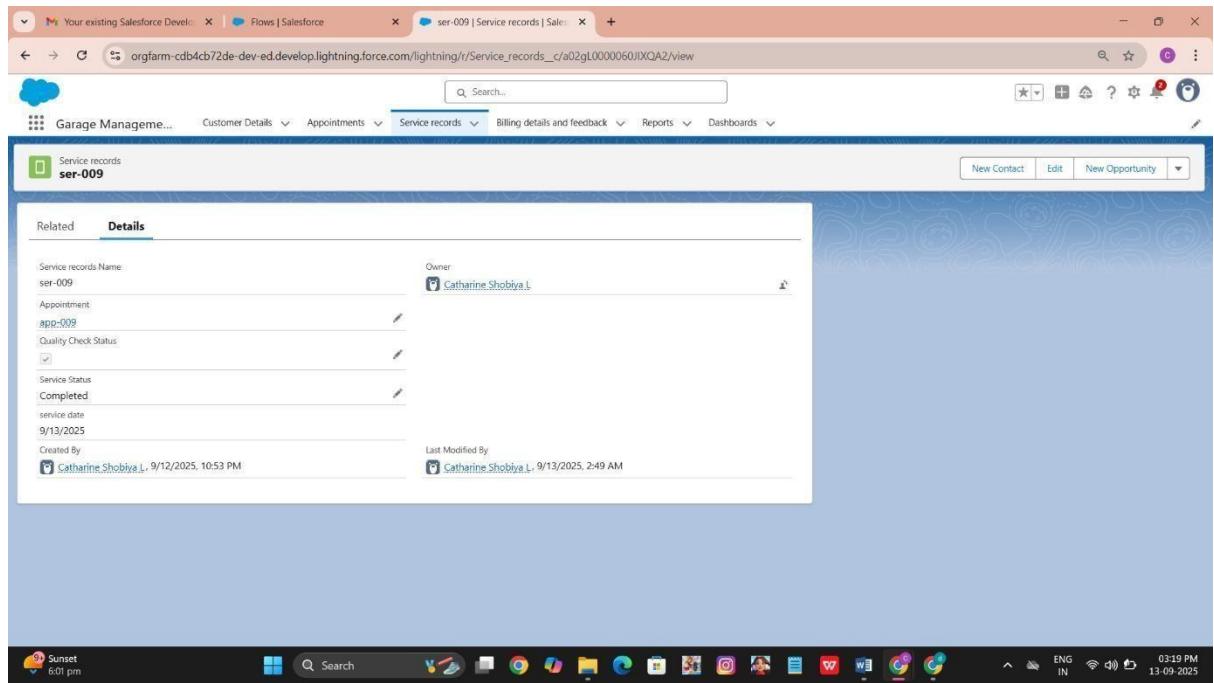
Created By: Catharine Shobiya L. 9/12/2025, 10:11 PM Last Modified By: Catharine Shobiya L. 9/12/2025, 10:11 PM

New Import Change Owner Assign Label

Cancel Save & New Save

Air: Moderate Tomorrow 02:18 PM 13-09-2025

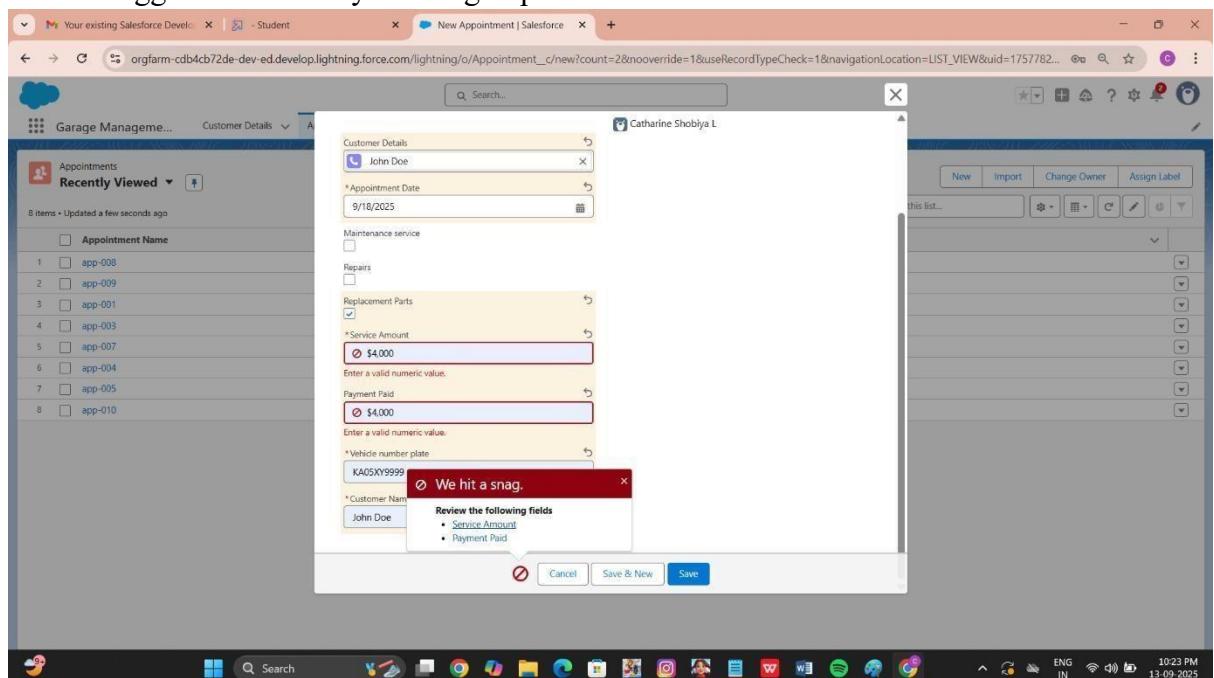
This screenshot shows the Salesforce Lightning interface. A modal window titled 'Edit app-009' is open, displaying a form with fields for Appointment Date (9/11/2025), Maintenance service (Repairs), Service Amount (\$1,000), and Vehicle number plate (DL01ZZZ0001). The modal also shows creation and modification history. The background shows a list of recently viewed appointments and a navigation bar for Garage Management System.



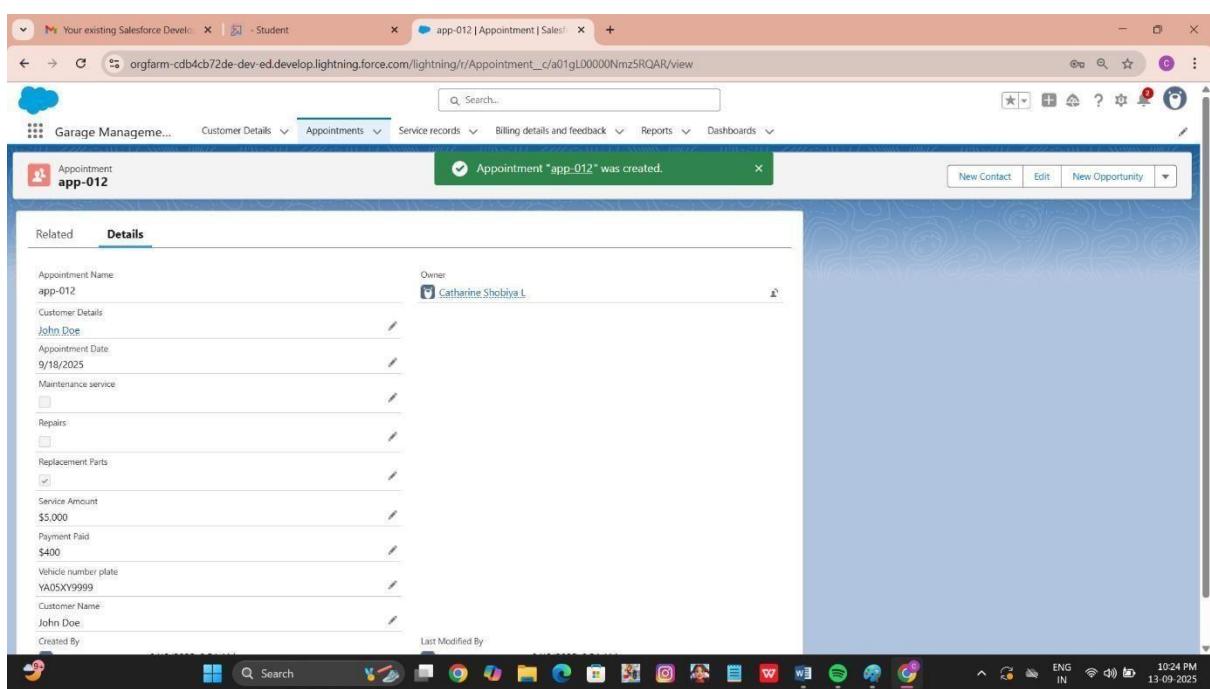
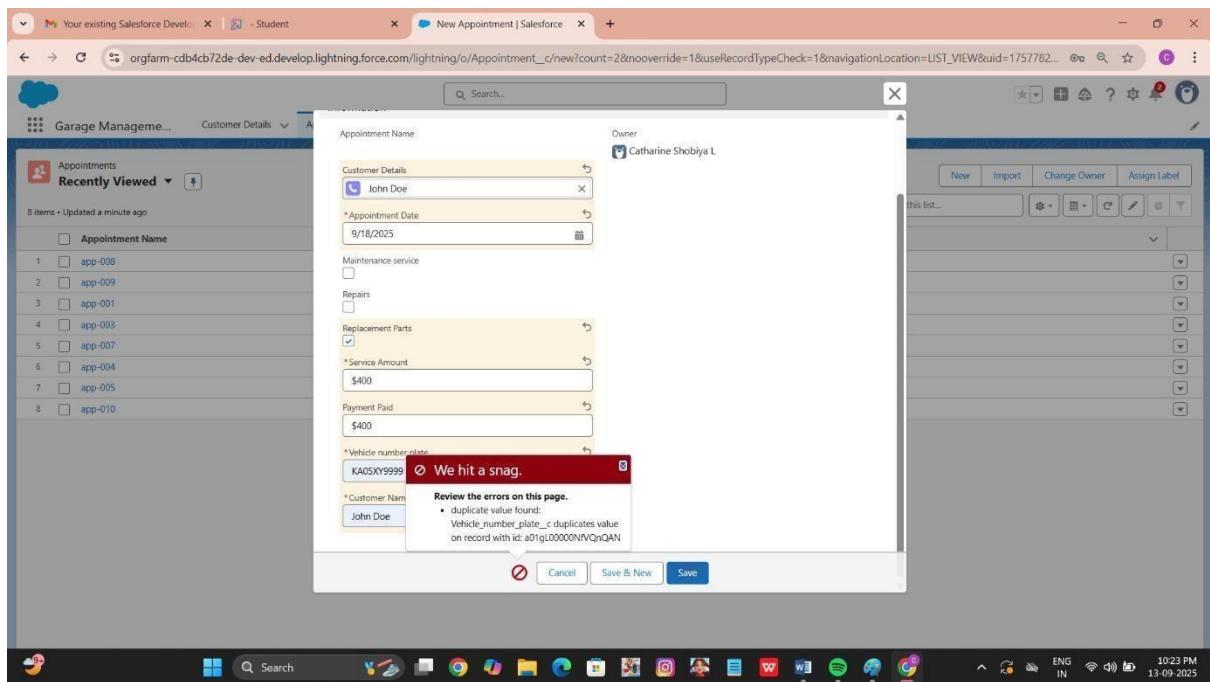
# FUNCTIONAL AND PERFORMANCE TESTING

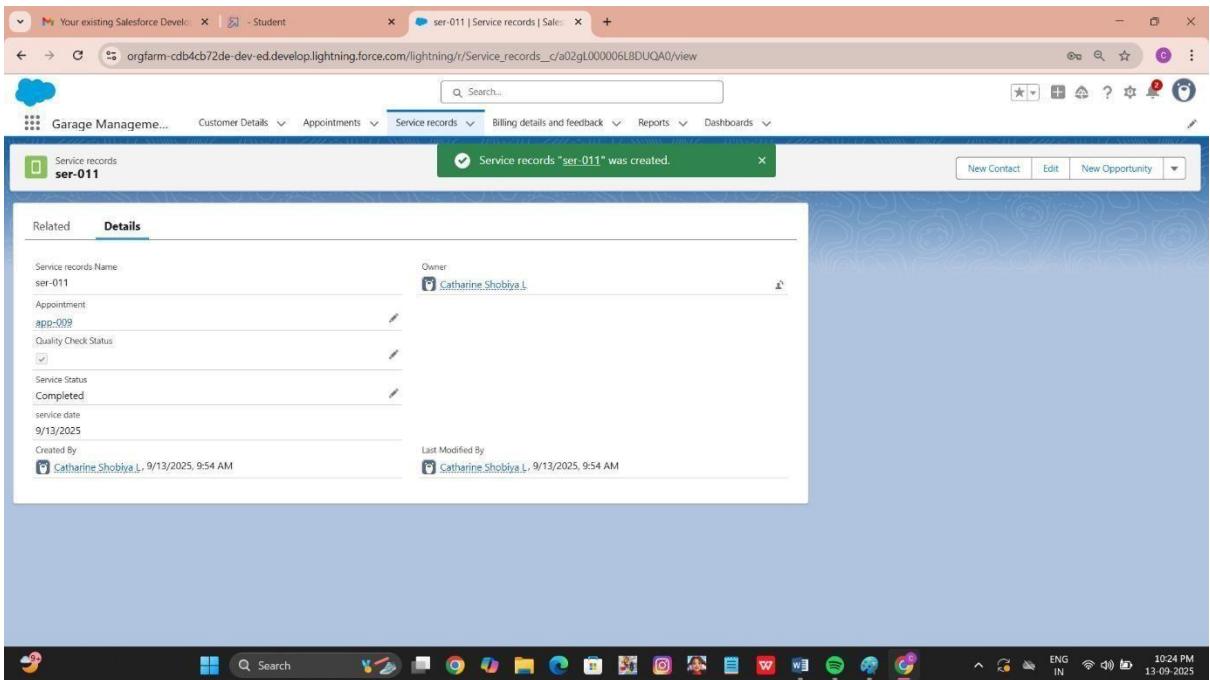
## Performance Testing

- Trigger validation by entering duplicate service amount records

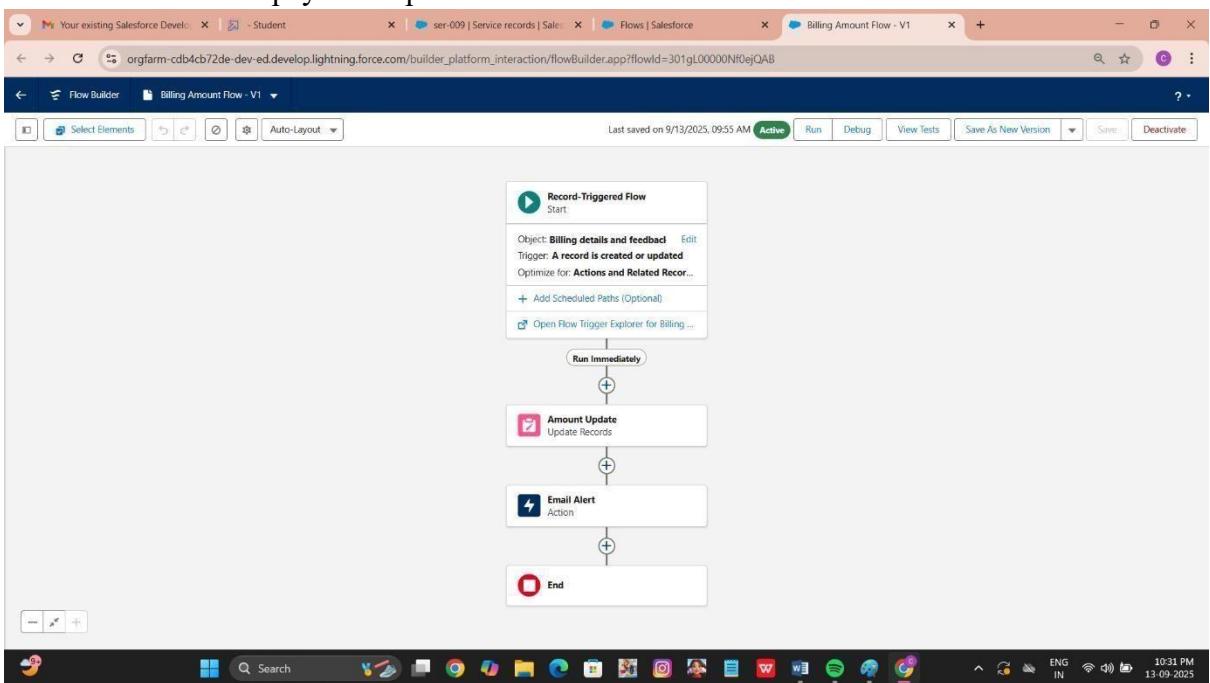


- Validation Rule checking





- Test flows on payment update



# RESULTS

## Output Screenshots

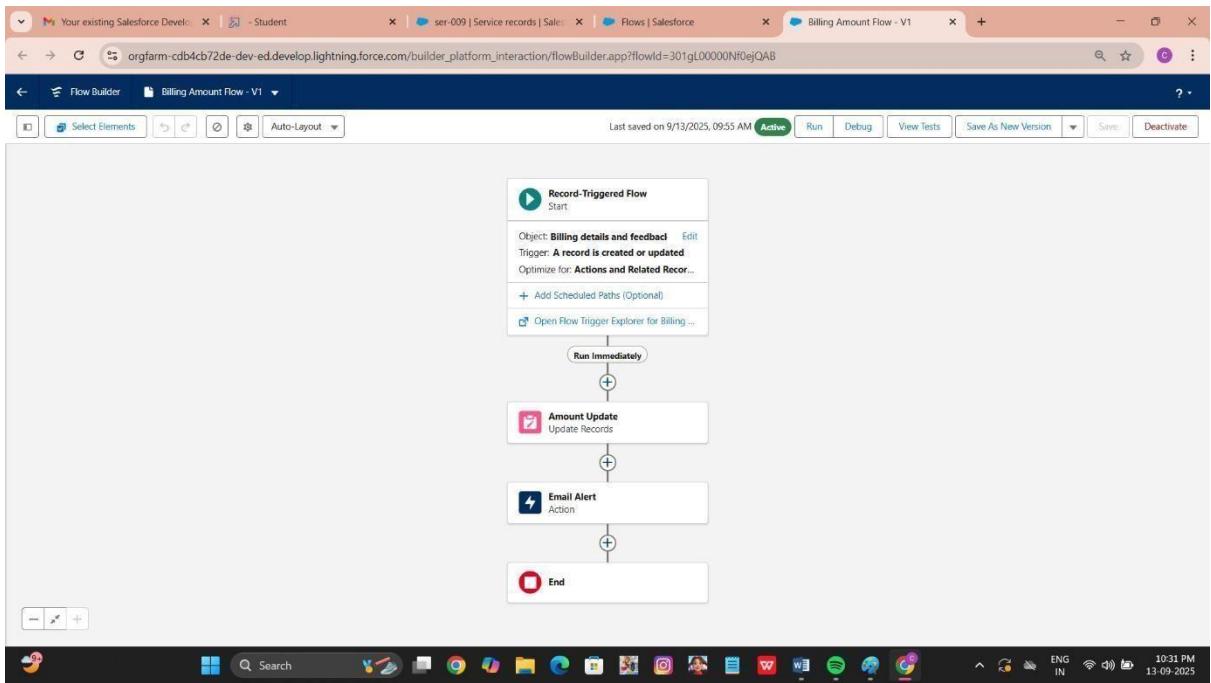
- Tabs for Customer Details, Appointment, Service records, Billing details and feedback

The screenshot shows the Salesforce Object Manager interface. A new relationship is being created for the 'Appointment' object. The 'Field Label' is set to 'Customer Details' and the 'Field Name' is set to 'Customer\_Details'. The 'Description' and 'Help Text' fields are empty. Under 'Child Relationship Name', 'Appointments' is selected. A note indicates that the field is required. The 'Lookup Filter' section is visible, with a note about creating a filter to limit records available to users in the lookup field. The status bar at the bottom shows system information like weather, time (02:18 PM), and date (13-09-2025).

## □ Appointments of the Customers

The screenshot shows the 'Appointments' list view in Salesforce. The 'Recently Viewed' filter is applied, displaying a list of 9 items updated a few seconds ago. The list includes entries such as 'app-012', 'app-005', 'app-008', 'app-009', 'app-001', 'app-003', 'app-007', 'app-004', and 'app-010'. The top navigation bar shows tabs for 'Customer Details', 'Appointments', 'Service records', 'Billing details and feedback', 'Reports', and 'Dashboards'. The status bar at the bottom shows system information like time (10:35 PM) and date (13-09-2025).

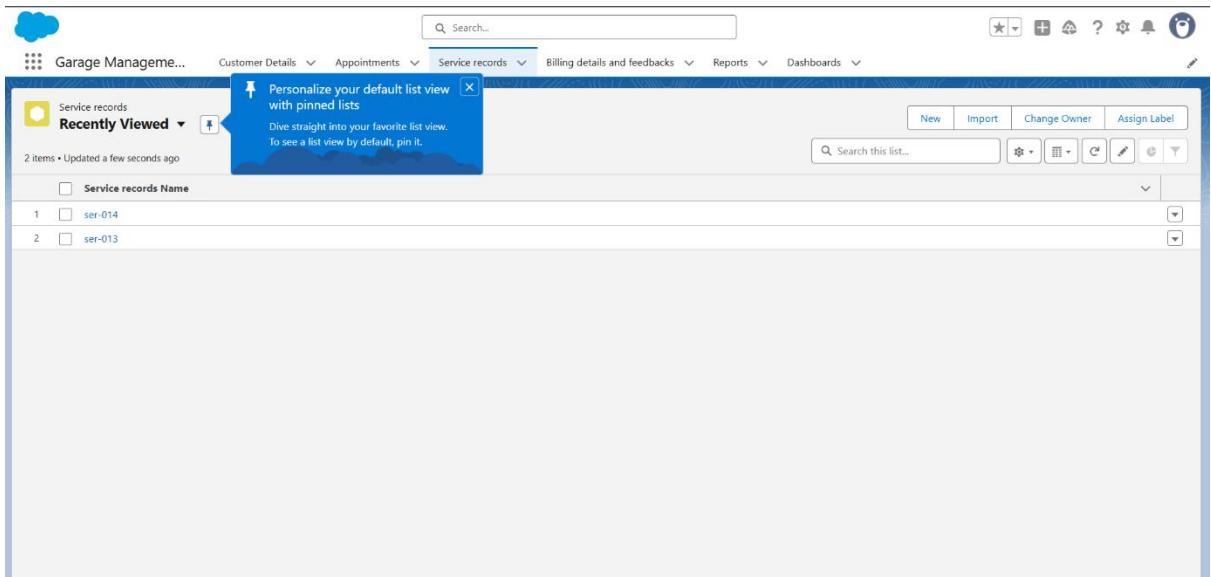
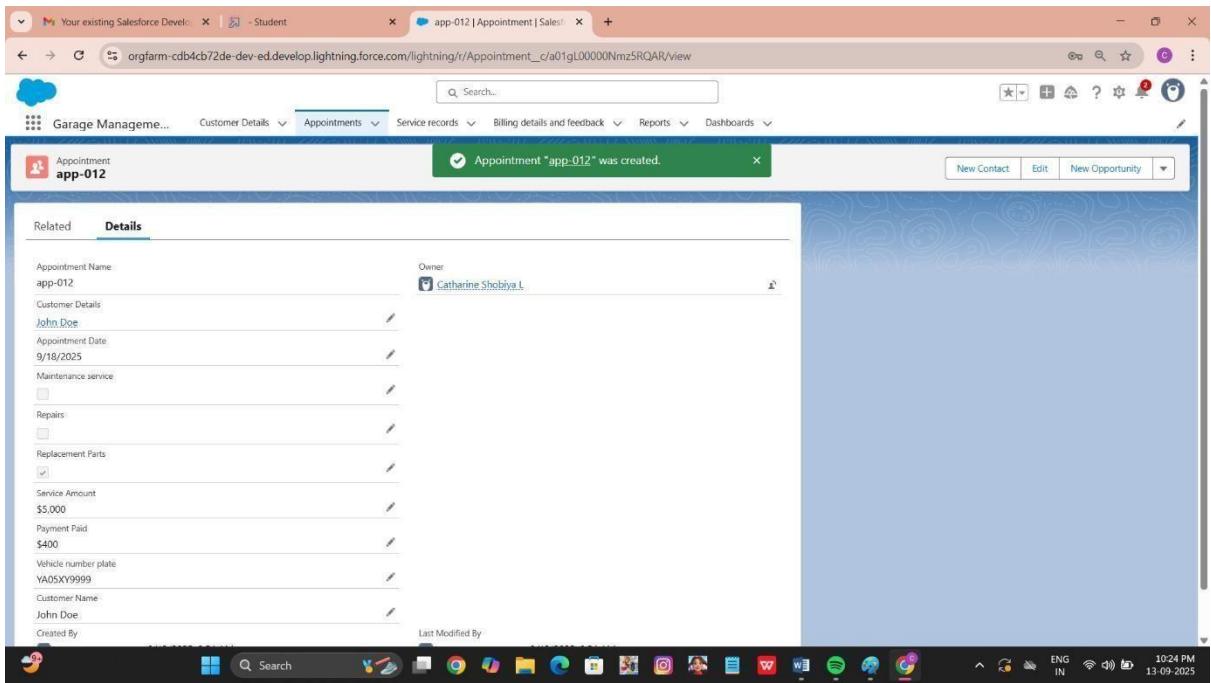
- Flow runs



- Trigger error messages

The screenshot shows a "Garage Management" application interface. A modal window titled "Information" is open, showing fields for an appointment. The "Vehicle number plate" field contains the value "KL34BN7859" and is highlighted with a blue border, suggesting it is the active field or has an error. Other visible fields include "Appointment Name" (list of items), "Customer Details" (set to "nandhu"), "Appointment Date" (set to 08/09/2025 at 12:00 pm), "Maintenance service" (checkbox checked), "Repairs" (checkbox checked), "Replacement Parts" (checkbox unchecked), "Service Amount" (set to ₹12,000), and "Vehicle number plate" (set to KL34BN7859).

- Approval process



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

Recently Viewed ▾

2 items • Updated a few seconds ago

	Billing details and feedback Name
1	bill-002
2	bill-001

New Import Change Owner Assign Label

Search this list...

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

Reports Recent 2 items

**REPORTS**

**Recent**

Report Name	Description	Folder	Created By	Created On	Subscribed
New Service information Report	Which flows run, what's the status of each interview, and how long do users take to complete the screens?	Garage Management Folder	Tharun S	17/9/2025, 11:22 am	
Sample Flow Report: Screen Flows	Public Reports	Automated Process		13/8/2025, 11:24 am	

**Created by Me**

**Private Reports**

**Public Reports**

**All Reports**

**FOLDERS**

**All Folders**

**Created by Me**

**Shared with Me**

**FAVORITES**

**All Favorites**

Search recent reports... New Report New Folder

Customer Details ...	Appointme...	Service recor...	Billing details and feedbac...
nandhu	app-029	ser-013	bill-001
Sakthi	app-025	ser-014	bill-002

View Report (New Service information Re...) As of 17-Sept-2025, 11:52 am

# ADVANTAGES & DISADVANTAGES

## ADVANTAGES:

- Automation of tasks → Reduces manual paperwork and human errors.
- Centralized data → Easy access to customer, vehicle, and job records in one place.
- Time efficiency → Faster job assignment, billing, and report generation.
- Inventory control → Real-time tracking of spare parts stock and usage.
- Improved customer service → Quicker updates and accurate invoices increase customer satisfaction.
- Decision-making support → Generates reports that help management plan resources and future growth.

## DISADVANTAGES:

- Initial setup cost → Requires investment in software, hardware, and training.
- Technical dependency → Staff must learn to use the system effectively.
- Maintenance required → Regular updates and backups are necessary to keep the system reliable.
- Limited offline use → System performance may depend on computer or internet availability.

# CONCLUSION

The Garage Management System successfully fulfills its objectives of automating and simplifying the day-to-day operations of automobile service centers. By digitizing processes such as customer registration, vehicle management, job assignment, inventory tracking, and billing, the system reduces manual workload, minimizes errors, and enhances efficiency. It not only improves internal workflow for garage staff but also ensures better service quality for customers through faster processing and accurate record-keeping. The modular design of the system allows for scalability and future enhancements, making it adaptable for garages of various sizes. Overall, the GMS provides a reliable, efficient, and user-friendly solution that bridges the gap between traditional manual processes and modern digital management practices.

# APPENDIX

- **Source Code:** Provided in Apex Classes and Triggers

AmountDistribution.apxt: trigger AmountDistribution on Appointment\_\_c  
(before insert, before update)

```
{  
    if(trigger.isbefore && trigger.isinsert || trigger.isupdate){  
        AmountDistributionHandler.amountDist(trigger.new);  
    }  
}
```

AmountDistributionHandler.apxc: public class

AmountDistributionHandler { public static void

```
amountDist(list<Appointment__c> listApp){  
    list<Service_records__c> serList = new list <Service_records__c>();  
    for(Appointment__c app : listApp){ if(app.Maintenance_service__c ==  
        true && app.Repairs__c == true &&  
        app.Replacement_Parts__c == true){  
            app.Service_Amount__c = 10000;
```

```
 } else if(app.Maintenance_service__c == true && app.Repairs__c ==  
 true){ app.Service_Amount__c = 5000;  
  
 } else if(app.Maintenance_service__c == true && app.Replacement_Parts__c  
 ==  
 true){ app.Service_Amount__c =  
  
 8000;  
  
 }  
 else if(app.Repairs__c == true && app.Replacement_Parts__c == true){  
     app.Service_Amount__c = 7000;  
 }  
 else if(app.Maintenance_service__c == true){  
     app.Service_Amount__c = 2000;  
 }  
 else if(app.Repairs__c == true){  
     app.Service_Amount__c = 3000;  
 }  
 else if(app.Replacement_Parts__c == true){  
     app.Service_Amount__c = 5000;  
 }  
}  
}
```