

GAGRAGE MANAGEMENT

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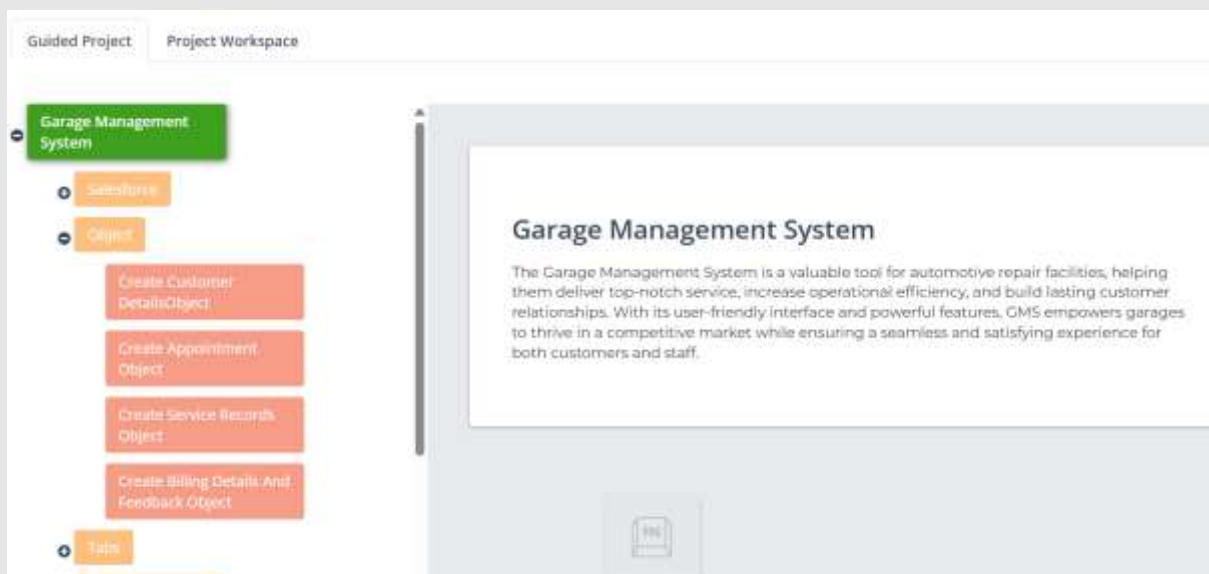
Team member: K Ramnath

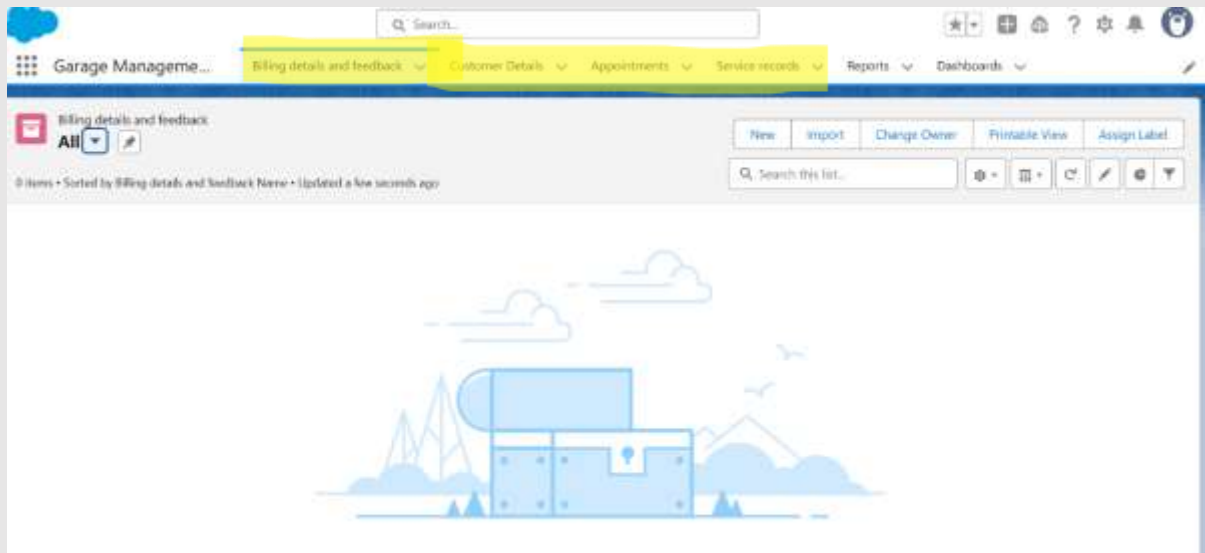
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Here we followed the instruction step by step:





Then we created tabs:

Guided Project
Project Workspace

Feedback Object

Tabs

Creating A Custom Tab

Creating Remaining Tabs

The Lightning App

Fields

Validation Rule

Duplicate Rule

Profiles

Role & Role Hierarchy

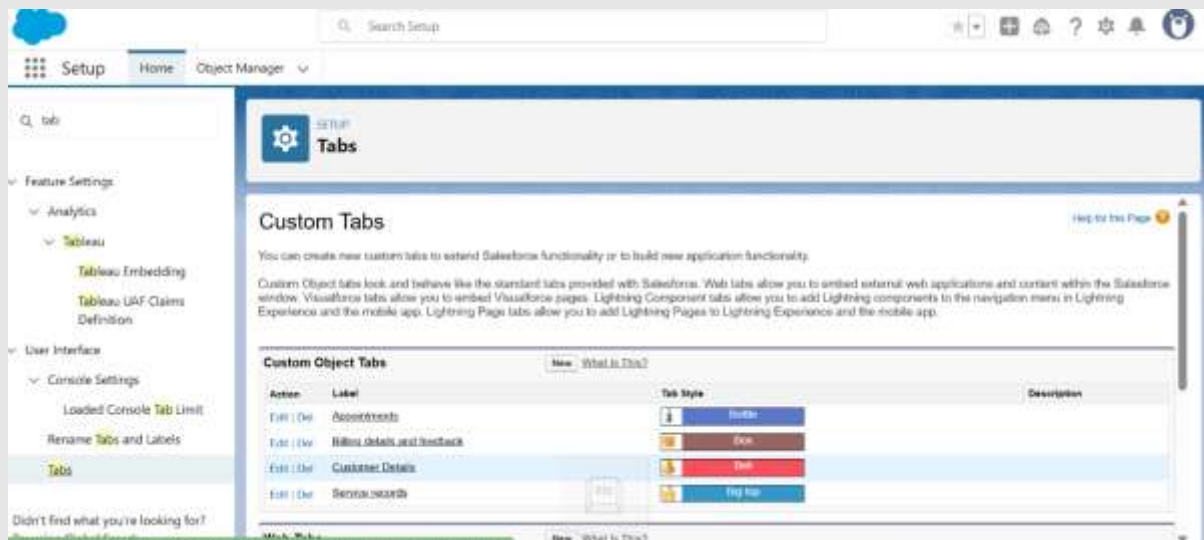
Users

Tabs

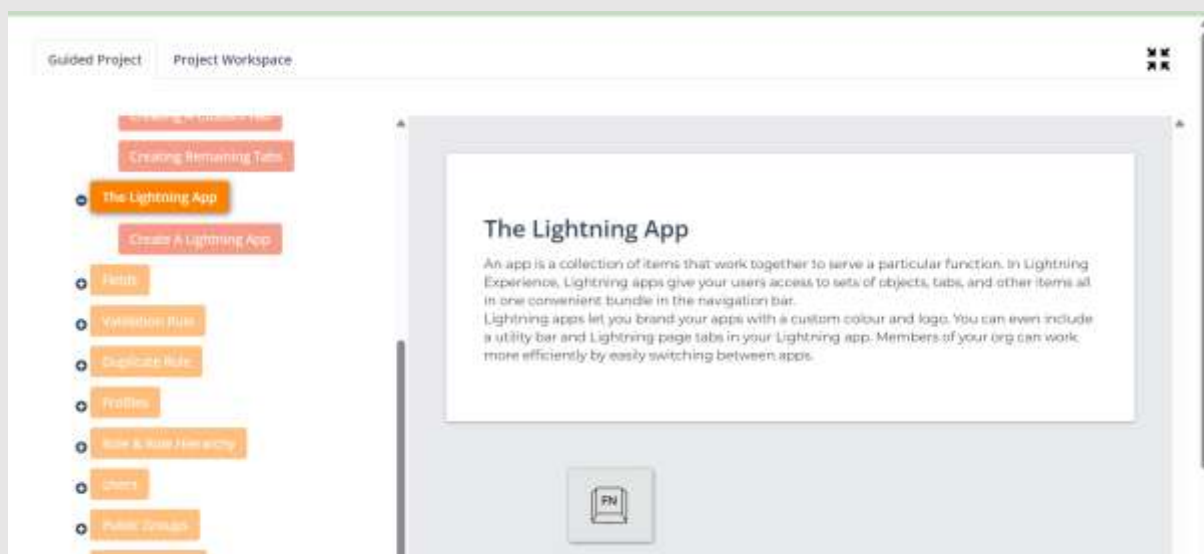
What is Tab: A tab is like a user interface that is used to build records for objects and to view the records in the objects.

Types of Tabs:

- Custom Tabs**
Custom Object tabs are the user interface for custom applications that you build in salesforce.com. They look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.
- Web Tabs**
Web Tabs are custom tabs that display web content or applications embedded in the salesforce.com window. Web tabs make it easier for your users to quickly access content and applications they frequently use without leaving the salesforce.com application.
- Visualforce Tabs**
Visualforce Tabs are custom tabs that display a Visualforce page. Visualforce tabs look and behave like standard salesforce.com tabs such as accounts, contacts, and opportunities.
- Lightning Component Tabs**



Next the lightning app



Lightning Experience App Manager

27 items • Sorted by App Name • Filtered by All appsets/items • TabSet Type: App Type

	App Name	Developer	Description	Last Modified	App Type	Visible
1	All Tabs	AllTabSet		8/25/2023, 12:51 A...	Classic	✓
2	Analytics Stud...	Insights	Build CRM Analytics dashboards and apps	8/25/2023, 12:51 A...	Classic	✓
3	App Launcher	AppLauncher	App launcher tabs	8/25/2023, 12:51 A...	Classic	✓
4	Approvals	Approvals	Manage approvals and approval flows	8/25/2023, 12:51 A...	Lightning	✓
5	Automation	FlowApp	Automate business processes and repetitive tasks.	8/25/2023, 12:55 A...	Lightning	✓
6	Bolt Solutions	LightningBolt	Discover and manage business solutions designed for your industry.	8/25/2023, 12:51 A...	Lightning	✓
7	Community	Community	Salesforce CRM Communities	8/25/2023, 12:51 A...	Classic	✓
8	Content	Content	Salesforce CRM Content	8/25/2023, 12:51 A...	Classic	✓
9	Data Cloud	Audience360	Build a thorough and complete understanding of your customers.	8/25/2023, 12:51 A...	Lightning	✓

Fields section:

Fields

When we talk about Salesforce, Fields represent the data stored in the columns of a relational database. It can also hold any valuable information that you require for a specific object. Hence, the overall searching, deletion, and editing of the records become simpler and quicker.

Types of Fields:

1. Standard Fields
2. Custom Fields

Standard Fields:

As the name suggests, the Standard Fields are the predefined fields in Salesforce that perform a standard task. The main point is that you can't simply delete a Standard Field until it is a non-required standard field. Otherwise, users have the option to delete them at any point from the application freely. Moreover, we have some fields that you will find common in every Salesforce application. They are,

- Created By
- Owner
- Last Modified
- Field Made During object Creation

Setup Home Object Manager

Search Setup

Setup > OBJECT MANAGER

Account

Details

Fields & Relationships

33+ Items, Sorted by Field Label

Quick Find New Deleted Fields Field Dependencies Set History Tracking

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Account Name	Name	Name		✓
Account Number	AccountNumber	Text(40)		
Account Owner	OwnerId	Lookup(User)		✓
Account Site	Site	Text(80)		
Account Source	AccountSource	Picklist		
Active	Active_c	Picklist		
Annual Revenue	AnnualRevenue	Currency(18, 0)		

Validation Rules:

Guided Project Project Workspace

Creating Formula Field in Service Records Object

Validation Rule

To Create A Validation Rule To An Appointment Object

To Create A Validation Rule To An Billing Details And Feedback Object

Duplicate Rule

Photos

Rules & Role Hierarchy

Users

Relationships

Validation Rule

Validation rules are applied when a user tries to save a record and are used to check if the data meets specified criteria. If the criteria are not met, the validation rule triggers an error message and prevents the user from saving the record until the issues are resolved.

Guided Project

Project Workspace

Duplicate Rule

To Create A Matching Rule To An Customer Details Object

To Create A Duplicate Rule To An Customer Details Object

Profiles

Role & Role Hierarchy

Users

Public Groups

Sharing Setting

Flows

To Create A Matching Rule To An Customer Details Object

- Go to quick find box in setup and search for matching Rule.
- Click on matching rule >> click on New Rule.
- Select the object as Customer details and click Next.

Duplicate rule:

Setup

Home

Object Manager

Search Setup

Setup

Matching Rules

All Matching Rules

Help for this Page

What Are Matching Rules?

[Expand]

View: All Matching Rules

Create New Rule

Action

Rule Name

Object

Status

Description

Last Modified Date

Last Modified By

Deactivate

Standard Account Matching Rule

Account

Active

Matching rule for account records. [More info](#)

8/29/2025

DEPC

Deactivate

Standard Contact Matching Rule

Contact

Active

Matching rule for contact records. [More info](#)

8/29/2025

DEPC

Deactivate

Standard Lead Matching Rule

Lead

Active

Matching rule for lead records. [More info](#)

8/29/2025

DEPC

Profiles:

Details Object

Profiles

Manager Profile

Sales Person Profile

Role & Role Hierarchy

Users

Public Groups

Sharing Setting

Flows

Apex Triggers

Requests

Dashboards

User Adoption

Profiles

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. Profile controls: Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges. You can define profiles by the user's job function. For example System Administrator, Developer, Sales Representative.

Types of profiles in salesforce:

- Standard profiles:**

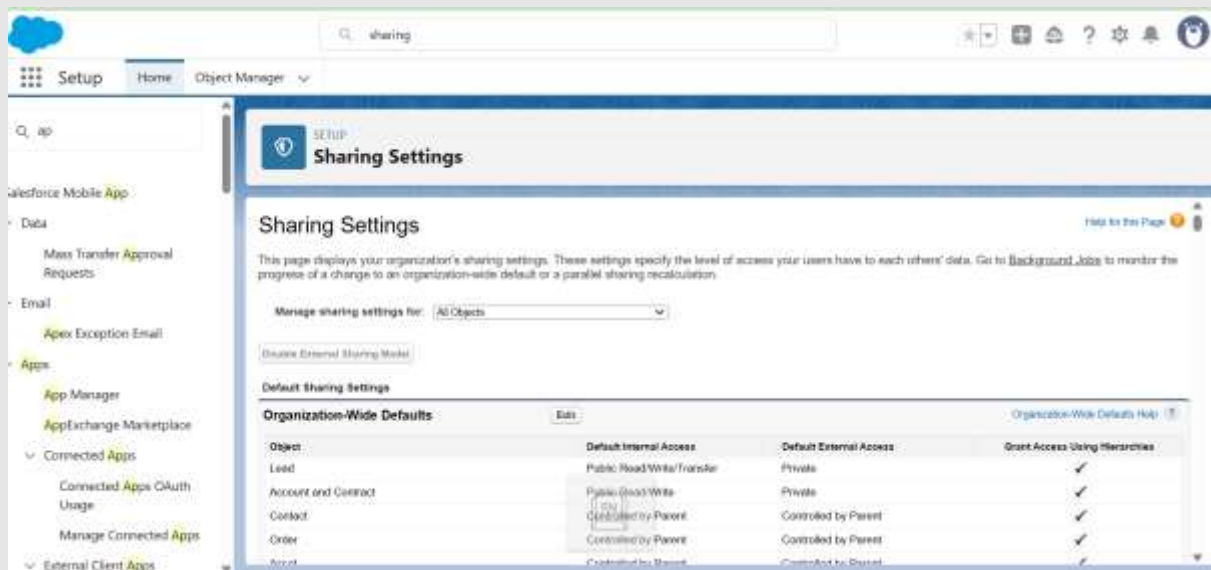
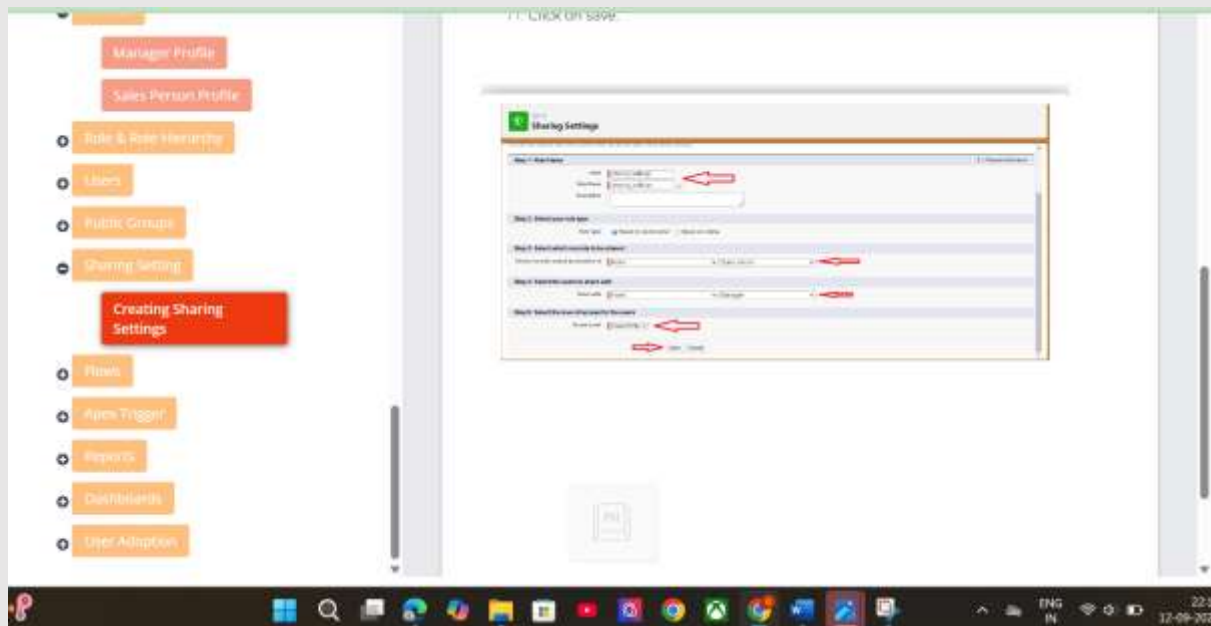
By default, salesforce provides below standard profiles.

 - Contract Manager
 - Read Only
 - Marketing User
 - Solutions Manager
 - Standard User
 - System Administrator

We cannot delete standard ones.
Each of these standard ones includes a default set of permissions for all of the standard objects available on the platform.
- Custom Profiles:**

Custom ones defined by us.
They can be deleted if there are no users assigned with that particular one.

Sharing setting:



Apex triggers:

The screenshot shows the Salesforce Developer console interface. On the left, the navigation menu includes: Sales Person Profile, Role & Role Hierarchy, Users, Public Groups, Sharing Settings, Roles, Create A Flow, Create Another Flow, Apex Triggers, Apex Handler, Reports, and Dashboards. The 'Apex Handler' item is highlighted. On the right, the 'Apex Handler' class is displayed with the following code:

```
1 public class AmountDistributionHandler {
2
3
4
5     public static void amountDist(list<Appointment__c> listApp){
6
7         list<Service_records__c> serList = new list <Service_records__c>();
8
9
10
11         for(Appointment__c app : listApp){
12
13             if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){
14
15                 //Insert your logic here
16
17             }
18         }
19     }
20 }
```

The screenshot shows the Salesforce Developer console interface. The 'AmountDistributionHandler.apex' file is open. The code is as follows:

```
1 public class AmountDistributionHandler {
2
3
4
5     public static void amountDist(list<Appointment__c> listApp){
6
7         list<Service_records__c> serList = new list <Service_records__c>();
8
9
10
11         for(Appointment__c app : listApp){
12
13             if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){
14
15                 //Insert your logic here
16
17             }
18         }
19     }
20 }
```

At the bottom, the 'Problems' tab is active, showing a message:

None	Line	Problem
AmountDistributionHandler	13	Variable does not exist: Maintenance_service__c

Report folder:

The screenshot displays the Salesforce interface with a sidebar on the left containing navigation links: 'Creating Sharing Settings', 'Reports', 'Apex Triggers', 'Apex Handlers', 'Reports', 'Create A Report Folder', 'Sharing A Report Folder', 'Create Report Type', 'Create Report', 'Dashboards', and 'User Adoption'. The main content area shows a guide titled 'Create A Report Folder' with the following steps:

1. Click on the app launcher and search for reports.
2. Click on the report tab, click on new folder.

Below the steps, there are two screenshots. The first shows the 'New Report' dialog box with the 'Folder' dropdown menu open, highlighting the 'New Folder' option. The second screenshot shows the 'Create folder' dialog box with the 'Folder Label' field containing 'Garage Management Folder' and the 'Folder Unique Name' field containing 'GarageManagementFolder'.

The screenshot shows the Salesforce Reports page. The top navigation bar includes a search bar and various icons. The main navigation menu on the left includes 'Garage Manage...', 'Billing details and feedback', 'Customer Details', 'Appointments', 'Service records', 'Reports', and 'Dashboards'. The 'Reports' section is active, showing a 'Recent' report folder. The 'Recent' report folder is highlighted in the left sidebar. The main content area displays a table of reports:

Report Name	Description	Folder	Created By	Created On	Subscribed
New Service Information Report		Garage Management Folder	T Gobul Schwarth	9/6/2025, 9:59 AM	

The left sidebar also includes links for 'Recent', 'Created by Me', 'Private Reports', 'Public Reports', 'All Reports', 'FOLDERS', 'All Folders', 'Created by Me', and 'Shared with Me'.

Dashboard:

Create Dashboard

1. Go to the app => click on the Dashboards tabs.
2. Give a Name and select the folder that created, and click on create.

New Dashboard

Name:

Description:

Folder:

3. Select add component.

Dashboards

Recent

Search recent dashboards...

DASHBOARD	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Customer review		Service Rating dashboard	f Gokul Satharath	9/8/2025, 10:04 AM	

DASHBOARDS

- Recent
- Created by Me
- Private Dashboards
- All Dashboards

FOLDERS

- All Folders
- Created by Me
- Shared with Me

FAVORITES

- All Favorites

Final part creating records:

The image shows a sidebar on the left with a list of steps for creating records, including 'Create Another Flow', 'Apex Trigger', 'Apex Handler', 'Reports', 'Create & Report Folder', 'Sharing & Report Folder', 'Create Report Type', 'Create Report', 'Dashboards', 'Create Dashboard Folder', 'Create Dashboard', 'User Adoption', and 'Creating Records'. The main content area is titled 'Creating Records' and provides instructions on how to create a record in the 'Garage Management' app. It includes a screenshot of the 'New Customer Detail' form, which has fields for 'Customer Name', 'Phone Number', 'Email', and 'Address'. The form also shows a 'Save' button and a 'Cancel' button.

The image shows the Salesforce 'Appointment' object manager. The left sidebar contains a list of navigation items: 'Details', 'Fields & Relationships', 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', 'Compact Layouts', 'Field Sets', 'Object Limits', 'Record Types', and 'Related Lookup Filters'. The main content area is titled 'Appointment Custom Field Customer Details' and shows the 'Custom Field Definition Detail' for the 'Customer Details' field. The field information table is as follows:

Field Information	Field Label	Field Name	API Name	Description	Help Text	Data Owner	Field Usage	Data Sensitivity Level	Compliance Categorization	Created By	Created Date	Modified By	Modified Date
	Customer Details	Customer_Details	Customer_Details__c							T. Global Software	8/20/2025 7:47 AM	T. Global Software	8/20/2025 7:47 AM

Conclusion:

He our team builded successfully a Garage management application successfully.