



GARAGE MANAGEMENT SYSTEMS

BACHELOR OF TECHNOLOGY IN INFORMATION
TECHNOLOGY

Team size: 4

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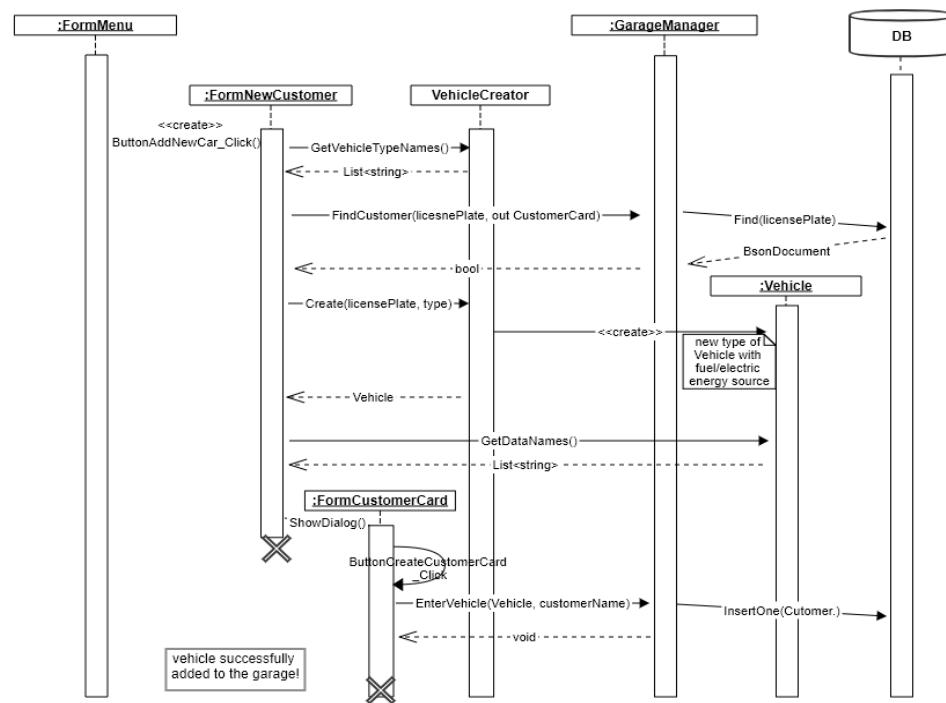
Department of Information Technology

Oxford Engineering College

1. INTRODUCTION

1.1 Project Overview:

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



1.2 Purpose :

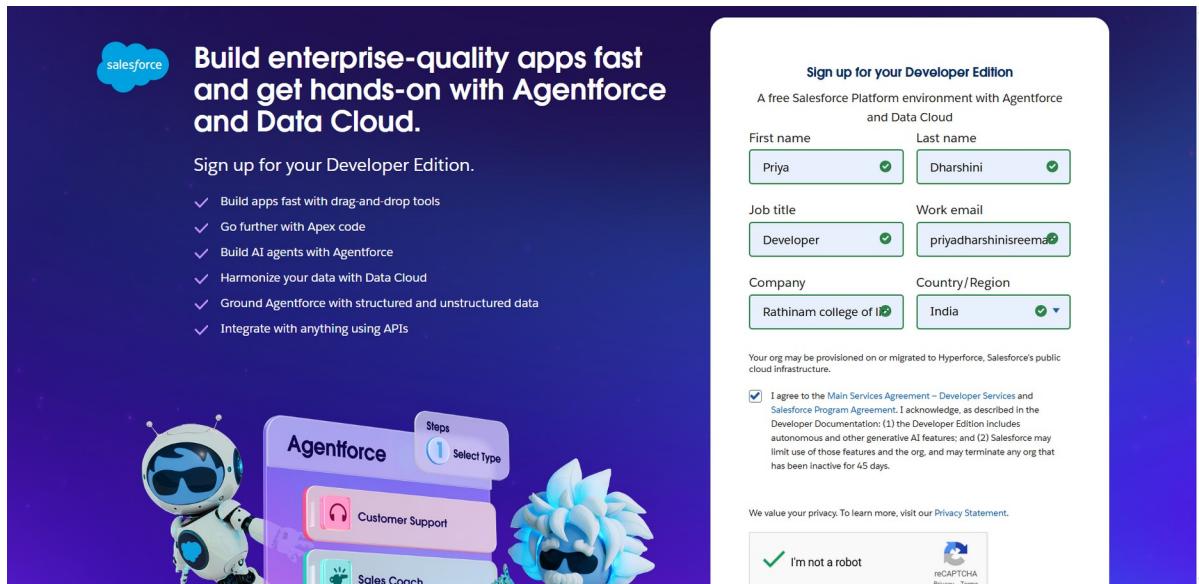
The **purpose of garage management** is to ensure the **efficient, safe, and cost-effective operation** of a garage—whether it's an automotive repair shop, service center, or fleet maintenance facility. It involves organizing and overseeing all aspects of the garage's operations to deliver high-quality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

Milestone 1: Salesforce

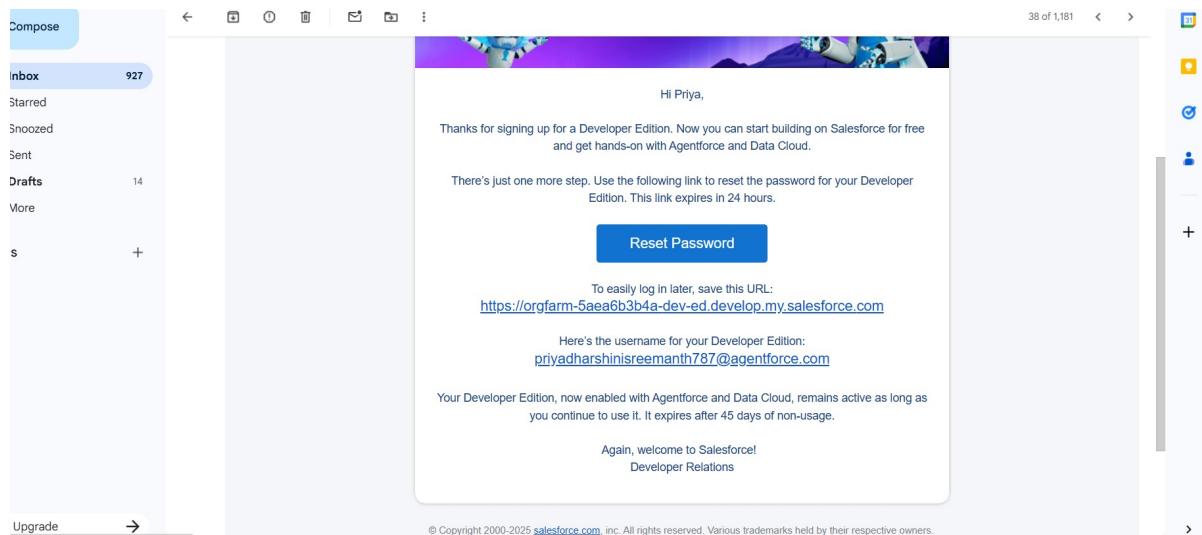
i) Creating Developer Account:

Using this URL-

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



ii) Account Activation



Milestone 2: Object

i)Creating customer detail:

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Setup, Home, and Object Manager. The main title is "customer Detail". On the left, a sidebar lists various configuration options: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The central "Details" section contains fields for API Name (set to "customer_Detail__c"), Custom (checked), Singular Label (set to "customer Detail"), and Plural Label (set to "customer Detail"). On the right, settings for Enable Reports, Track Activities, Track Field History, Deployment Status (set to "Deployed"), Help Settings, and Standard salesforce.com Help Window are shown. At the bottom right are "Edit" and "Delete" buttons.

ii)Creating Appointments:

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Setup, Home, and Object Manager. The main title is "Appointments". The left sidebar lists the same configuration options as the previous screenshot. The central "Details" section contains fields for API Name (set to "Appointments__c"), Custom (checked), Singular Label (set to "Appointments"), and Plural Label (set to "Appointments"). On the right, settings for Enable Reports, Track Activities, Track Field History, Deployment Status (set to "Deployed"), Help Settings, and Standard salesforce.com Help Window are shown. At the bottom right are "Edit" and "Delete" buttons.

iii)Creating service records:

The screenshot shows the Salesforce Setup interface with the URL <https://orgfarm-5aea6b3b4a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01gL00000238mH/Details/view>. The page title is "Service records". The left sidebar under "Details" includes options like Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts (which is selected), Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main "Details" section shows the API Name as "Service_records_c", which is Custom (checked). The Singular Label is "Service records" and the Plural Label is "Service records". On the right, there are sections for Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). Buttons for "Edit" and "Delete" are at the top right.

iv) Creating Billing details and feedback:

The screenshot shows the Salesforce Setup interface with the URL <https://orgfarm-5aea6b3b4a-dev-ed.develop.lightning.force.com/lightning/setup/ObjectManager/01gL00000238nt/Details/view>. The page title is "Billing details and feedback". The left sidebar under "Details" includes options like Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts (which is selected), Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main "Details" section shows the API Name as "Billing_details_and_feedback_c", which is Custom (checked). The Singular Label is "Billing details and feedback" and the Plural Label is "Billing details and feedback". On the right, there are sections for Enable Reports (checked), Track Activities (checked), Track Field History (checked), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). Buttons for "Edit" and "Delete" are at the top right.

Milestone 3: Tabs

i)Creating custom tabs:

The screenshot shows the Salesforce Setup interface under Object Manager for the Appointments object. On the left, a sidebar lists various setup categories like Details, Page Layouts, and Record Types. The main panel is titled 'Data Type' and contains a list of field types with their descriptions. The 'None Selected' option is selected.

Data Type	Description
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.
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.
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.
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.
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 rolling 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.
External Lookup Relationship	Creates a relationship that links this object to an external object whose data is stored outside the Salesforce org.
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 popup calendar.
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.
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 Email.

The screenshot shows the Salesforce Setup interface under Object Manager for the Appointments object. The left sidebar shows various setup categories. The main panel is titled 'New Custom Field' and is on 'Step 2. Enter the details'. The field is named 'Maintenance service' with 'Unchecked' as the default value. The 'Field Name' is 'Maintenance_service'. There is a note about adding the field to existing report types. Navigation buttons for 'Previous', 'Next', and 'Cancel' are at the bottom right.

ii)Creating Remaining Tabs

Custom Object Tabs

Action	Label	Tab Style	Description
Edit Del	Appointments	Bank	
Edit Del	Billing details and feedback	Books	
Edit Del	customer Detail	Bell	
Edit Del	Service records	Can	

Web Tabs

No Web Tabs have been defined.

Visualforce Tabs

No Visualforce Tabs have been defined.

Lightning Component Tabs

No Lightning component tabs have been defined.

Lightning Page Tabs

No Lightning Page Tabs have been defined.

Milestone 4: The lightning app

i)Creating lightning app

Lightning Experience App Manager

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

New Lightning App

App Details & Branding

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

App Details

* App Name

* Developer Name

Description

App Branding

Image

Primary Color Hex
Value

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	9/7/2025, 9:38 A...	Lightning
13	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

Create ▾

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

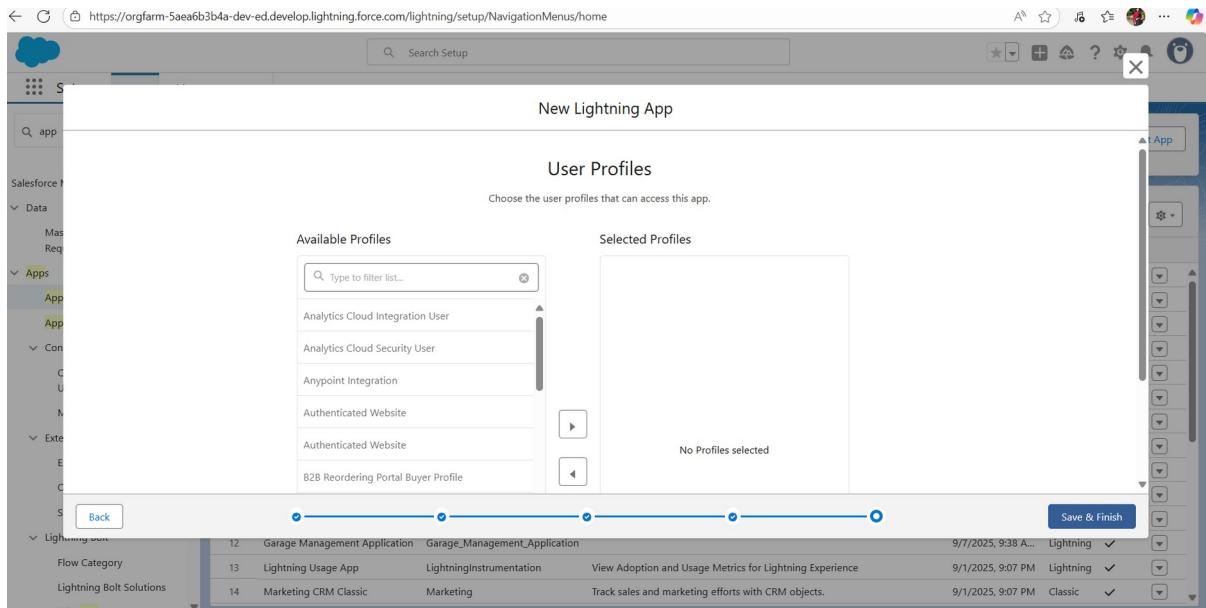
Selected Items

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

▲ ▼

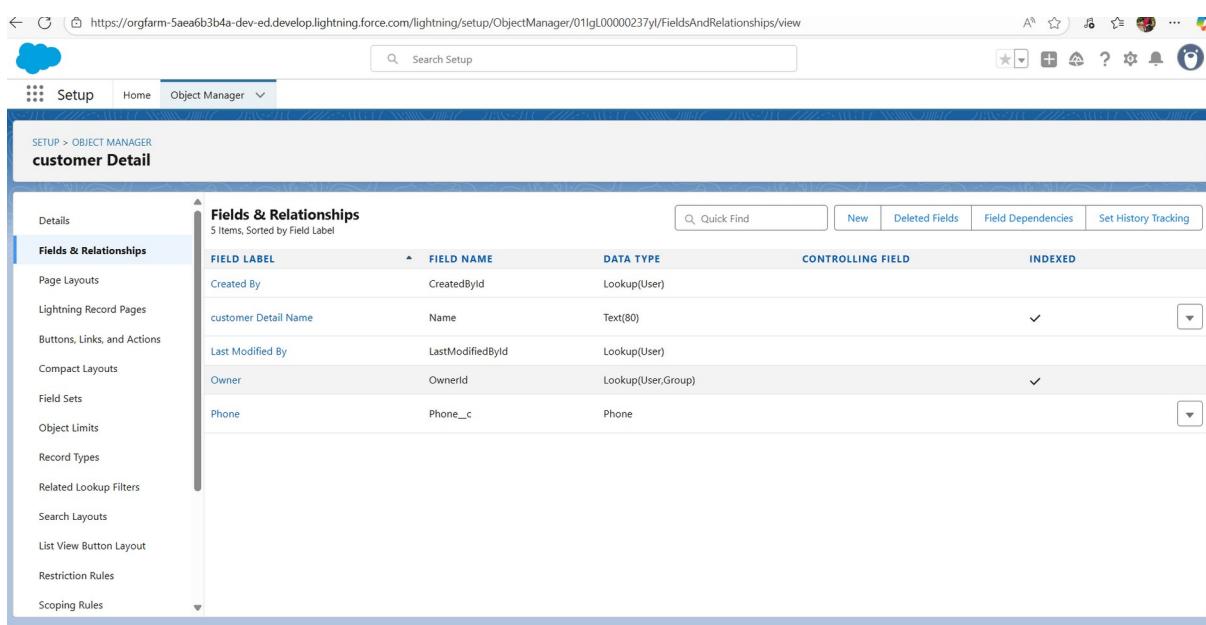
Next

Back	12	Garage Management Application	Garage_Management_Application	9/7/2025, 9:38 A...	Lightning
	13	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 Object Manager interface for the 'Appointments' object. The left sidebar is collapsed, and the main area displays the 'Fields & Relationships' section. A table lists five fields:

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

iii) Creation of Checkbox Fields

The screenshot shows the Salesforce Object Manager interface for the 'Service records' object. The left sidebar is collapsed, and the main area displays the 'Fields & Relationships' section. A table lists six fields:

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

iv)Creation of date Fields

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

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

v)Creation of Currency Fields

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

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

vi)Creation of Text Fields

The screenshot shows the Salesforce Setup interface under the Object Manager. A new text field has been created for the 'Service records' object. The field is named 'Name' and has a data type of 'Text(80)'. It is indexed and controlling fields for other fields like 'Appointments' and 'Owner'.

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)		✓

vii)Creating Formula Field in Service records Object

The screenshot shows the Salesforce Setup interface under the Object Manager. A new formula field has been created for the 'Billing details and feedback' object. The field is named 'Payment Paid' and has a data type of 'Currency(18, 0)'. It is indexed and controlling fields for other fields like 'Billing details and feedback Name' and 'Service records'.

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

Milestone 6: Validation rule

i) To create a validation rule to an Appointment Object

The screenshot shows the Salesforce Setup interface for the Appointments object. The left sidebar lists various configuration options: Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, Scoping Rules, Object Access, Triggers, Flow Triggers, Validation Rules (which is selected and highlighted in blue), and Conditional Field Formatting.

The main content area displays the "Validation Rule Edit" screen for the "Vehicle" rule. The "Rule Name" field contains "Vehicle". The "Active" checkbox is checked. The "Description" field is empty. The "Error Condition Formula" field contains the expression: `NOT(REGEX(Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))`. A tooltip for the "ABS" function is visible, stating: "Returns the absolute value of a number, a number without its sign". The "Functions" dropdown menu also lists ACOS, ADDMONTHS, AND, ASCII, ASIN, and Insert Selected 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** [i](#)

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

The screenshot shows the Salesforce Object Manager interface. At the top, there's a navigation bar with links for Setup, Home, and Object Manager. The main area is titled "Appointments Validation Rule". It displays a single validation rule with the following details:

Validation Rule Detail	
Rule Name	Vehicle
Error Formula	NOT(REGEX(Vehicle_number_plate__c, "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))
Error Message	Please enter valid number
Description	
Created By	Priya Dharshini, 9/8/2025, 1:02 AM
Modified By	Priya Dharshini, 9/8/2025, 1:02 AM

At the bottom of the page, there are "Edit" and "Clone" buttons.

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

The screenshot shows the "Validation Rules" list for the "Billing details and feedback" object. There is one item listed:

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	✓	Priya Dharshini, 9/14/2025, 9:16 AM

Milestone 7: Duplicate rule

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

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

Screenshot 1: Matching Rules - All Matching Rules

This screenshot shows the "Matching Rules" page under the "Setup" menu. The URL is [/setup/objects/matchingrules/list](#). The page title is "Matching Rules". It displays a table of existing matching rules, with one row selected: "Matching customer detail" for the "Customer Detail" object. The table includes columns for Action, Rule Name, Object, Status, Description, Last Modified Date, and Last Modified By.

Action	Rule Name	Object	Status	Description	Last Modified Date	Last Modified By
Detail	Matching customer detail	Customer Detail	Active		08/2025	xyz

Screenshot 2: Matching Rules - New Matching Rule

This screenshot shows the "New Matching Rule" wizard under the "Setup" menu. The URL is [/setup/objects/matchingrules/new](#). The title is "New Matching Rule". It's Step 1: Select object. The "Object" dropdown is set to "Customer Detail". There are "Next" and "Cancel" buttons at the bottom.

Screenshot 3: Duplicate Rules - Customer Detail duplicate

This screenshot shows the "Duplicate Rules" page under the "Setup" menu. The URL is [/setup/objects/duplicaterules/list](#). The title is "Customer Detail duplicate". It shows the "Duplicate Rule Detail" for "Customer Detail duplicate". The rule has a "Matching Criteria" of "(customer Detail: Gmail EXACT MatchBlank = FALSE) AND (customer Detail: Phone EXACT MatchBlank = FALSE)". The "Matching Rule" is "Matching customer details" (status: Mapped). There are "Edit", "Delete", "Clone", and "Deactivate" buttons at the bottom.

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

The screenshot shows the Salesforce Setup interface. The left sidebar has 'Data' expanded, with 'Duplicate Management' selected. A search bar at the top left shows 'dupli'. The main content area is titled 'Duplicate Rules' and shows a single rule named 'Customer Detail duplicate'. The rule details are as follows:

- Duplicate Rule Detail:**
 - Rule Name: Customer Detail duplicate
 - Description: customer Detail
 - Object: customer Detail
 - Record-Level Security: Enforce sharing rules
 - Action On Create: Allow
 - Action On Edit: Allow
 - Alert Text: Use one of these records?
 - Active: ✓
 - Matching Rule: Matching_customer_details (Mapped)
 - Conditions: Created By Priya Dharshini, 9/8/2025, 1:17 AM
- Operations On Create:** Alert ✓ Report
- Operations On Edit:** Alert Report
- Matching Criteria:** (customer Detail: Gmail Exact MatchBlank = FALSE) AND (customer Detail: Phone Exact MatchBlank = FALSE)
- Modified By:** Priya Dharshini, 9/8/2025, 1:17 AM

The screenshot shows the Salesforce Setup interface. The left sidebar has 'Data' expanded, with 'Matching Rules' selected. A search bar at the top left shows 'matching rules'. The main content area is titled 'Matching Rules' and shows a single rule named 'Matching customer details'. The rule details are as follows:

- Matching Rule Detail:**
 - Object: customer Detail
 - Rule Name: Matching customer details
 - Unique Name: Matching_customer_details
 - Description: Matching customer details
 - Matching Criteria: (customer Detail: Gmail Exact MatchBlank = FALSE) AND (customer Detail: Phone Exact MatchBlank = FALSE)
 - Status: Inactive
 - Created By: Priya Dharshini, 9/8/2025, 1:17 AM
- Matching Rule Activation:** A modal window is displayed, stating: "We're activating your matching rule. We'll send an email to priyadharshinisreemanth@gmail.com when the activation process is complete." with an "OK" button.

Milestone 8: Profiles

i) Manager Profile

Clone Profile

Enter the name of the new profile

You must select an existing profile to clone from.

Existing Profile: Standard User

User License: Salesforce

Profile Name: Manager

Save Cancel

Profile Detail

Name: manage

User License: Salesforce Platform

Description:

Created By: Priya Dharshini 9/14/2025, 8:30 AM

Modified By: Priya Dharshini 9/14/2025, 8:30 AM

Page Layouts

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

Custom App Settings

	Visible	Default		Visible	Default
Analytics Studio (standard_Insights)	<input type="checkbox"/>	<input checked="" type="radio"/>	Platform (standard_Platform)	<input checked="" type="checkbox"/>	<input type="radio"/>
App Launcher (standard_AppLauncher)	<input type="checkbox"/>	<input type="radio"/>	WDC (standard_Work)	<input type="checkbox"/>	<input type="radio"/>
Garage Management Application (Garage_Management_Application)	<input checked="" type="checkbox"/>	<input checked="" type="radio"/>			

Service Provider Access

Tab Settings

ii) sales person Profile

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"/>	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"/>		
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"/>	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"/>			
Custom Object Permissions																	
	Basic Access				Data Administration					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 type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	customer Detail	<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"/>	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	<input type="text" value="8 hours of inactivity"/> <small>(s)</small>								Session Security Level Required at Login	<input type="text" value="--None--"/> <small>(s)</small>							
Password Policies																	

The screenshot shows the Salesforce Lightning Setup interface. The top navigation bar includes links for Home, Object Manager, and a search bar labeled "Search Setup". Below the navigation is a sidebar with "Setup" selected, followed by "Home" and "Object Manager". A search bar at the top left contains the query "prof". The main content area is titled "Profiles" and "Manager". It displays a message about profiles having permissions and page layouts, and how administrators can change them. It also mentions Record Types and their edit links. Below this is a "Profile Detail" section for a "Manager" profile. The profile details include Name (Manager), User License (Salesforce), Description (empty), Created By (Priya Dharshini), and Modified By (Priya Dharshini). There are buttons for Edit, Clone, Delete, and View Users. At the bottom, there's a "Page Layouts" section for various standard object layouts like Account, Contact, Case, etc., showing their current assignments.

Milestone 9: Role & Role Hierarchy

i) Creating Manager Role

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

- Executive Staff**: CEO, President, CFO, VP_Sales. Description: View & edit data, roll up forecasts, & generate reports for all users below. Can't access data of other Executive Staff.
- Western Sales Director**: Director of W. Sales. Description: View & edit data, roll up forecasts, & generate reports for all users directly below. Can't access data of users above or at same level.
- Eastern Sales Director**: Director of E. Sales. Description: View & edit data, roll up forecasts, & generate reports for all users directly below. Can't access data of users above or at same level.
- International Sales Director**: Director of Int'l Sales. Description: View & edit data, roll up forecasts, & generate reports only for own data. Can't access data of users above or at same level.
- Western Sales Rep**: UK Sales Rep, OR Sales Rep. Description: View & edit data, roll up forecasts, & generate reports only for own data. Can't access data of users above or at same level.
- Eastern Sales Rep**: NY Sales Rep, MA Sales Rep. Description: View & edit data, roll up forecasts, & generate reports only for own data. Can't access data of users above or at same level.
- International Sales Rep**: Asian Sales Rep, European Sales Rep. Description: View & edit data, roll up forecasts, & generate reports only for own data. Can't access data of users above or at same level.

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

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

- Rathinam college of liberal arts and science @ Tips global Kovilpalayam**
 - CEO**: Edit | Del | Assign
 - CFO**: Edit | Del | Assign
 - COO**: Edit | Del | Assign
 - Manager**: Edit | Del | Assign
 - 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

At the top right of the main content area, there's a 'Show in tree view' button.

The screenshots illustrate the process of creating a new role in Salesforce.

Screenshot 1: Role Creation

- The left sidebar shows navigation paths: Roles > Contact Roles on Contracts > Contact Roles on Opportunities > Case Teams > Case Team Roles > Contact Roles on Cases.
- The main area shows the "Roles" page with a "New Role" button.
- The "Role Edit" form has the following fields:
 - Label: manager
 - Role Name: manager
 - This role reports to: CEO
 - Role Name as displayed on reports: manager
- Buttons at the bottom: Save, Save & New, Cancel.

Screenshot 2: Role Details

- The left sidebar shows navigation paths: Users > Roles > Feature Settings > Sales > Contact Roles on Contracts > Contact Roles on Opportunities > Service > Case Teams > Case Team Roles > Contact Roles on Cases.
- The main area shows the "Roles" page with the "Manager" role selected.
- The "Role Detail" section for the Manager role includes:
 - Role: Manager
 - Label: manager
 - Manager: CEO
 - Modified By: Priya Dharshini (9/8/2025, 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
- A "Users in Manager Role" section shows no records.

ii)Creating another roles

The image displays two screenshots of the Salesforce Setup interface, illustrating the configuration of roles and users.

Screenshot 1: Roles Page

This screenshot shows the 'Roles' page in the Setup menu. The sidebar includes links for Sales, Service, and Case Teams. The main content area lists various roles under a tree structure:

- CEO**: Add Role, Edit, Del, Assign
 - CFO**: Add Role, Edit, Del, Assign
 - COO**: Add Role, Edit, Del, Assign
 - Manager**: Add Role, Edit, Del, Assign
 - sales person**: Edit, Del, Assign
 - SVP.Customer Service & Support**: Add Role, Edit, Del, Assign
 - Customer Support, International**: Add Role, Edit, Del, Assign
 - Customer Support, North America**: Add Role, Edit, Del, Assign
 - Installation & Repair Services**: Add Role, Edit, Del, Assign
 - SVP.Human Resources**: Add Role, Edit, Del, Assign
 - SVP.Sales & Marketing**: Add Role, Edit, Del, Assign
 - VP.International Sales**: Edit, Del, Assign
 - VP.Marketing**: Edit, Del, Assign

Screenshot 2: sales person Role Detail

This screenshot shows the details for the 'sales person' role. The 'Role Detail' section includes:

- Label**: sales person
- This role reports to**: Manager
- Modified by**: Priya Dharshini, 9/8/2025, 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

The 'Users in sales person Role' section shows no records displayed.

Milestone 10: Users

i) Create User

The screenshot shows the Salesforce Setup interface for creating a new user. The left sidebar is titled 'Users' and includes options like Permission Set Groups, Profiles, Public Groups, Queues, Roles, User Management Settings, and Feature Settings. The main area is titled 'New User' under 'User Edit'. The 'General Information' section contains fields for First Name (priya), Last Name (Priya Dharshini), Alias (ppriy), Email (priyadharshinisreemanth@gmail.com), Username (priyashy5@agentforce.com), Nickname (User175785839677767620), Title (Developer), Company (Developer), Department (), and Division (). On the right, there are sections for Role (<None Specified>), User License (Force.com - Free), Profile (Force.com - Free User), and various checkboxes for 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 (None), Data.com Monthly Addition Limit (Default Limit (300)), Accessibility Mode (Classic Only), High-Contrast Palette on Charts, and Load Lightning Pages While Scrolling.

ii) creating another users

The screenshot shows the Salesforce Setup interface for creating another user. The left sidebar is identical to the previous screenshot. The main area shows a user record for 'Niklaus Mikaelson'. The 'User Detail' section displays the following information: Name (Niklaus Mikaelson), Alias (nmika), Email (priyadharshinisreemanth@gmail.com), Username (priyashy5@agentforce.com), Nickname (nk), Title (), Company (), Department (), Division (), Address (India), Time Zone (GMT-07:00 Pacific Daylight Time (America/Los_Angeles)), Locale (English (United States)), Language (English), Delegated Approver (Manager), Receive Approval Request Emails (Only if I am an approver), Federation ID (), and Role (Manager). The right side of the screen shows the same configuration options as the first user creation screen, including checkboxes for 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 (View), Accessibility Mode (Classic Only), Debug Mode, and High-Contrast Palette on Charts.

Milestone 11: Public groups

i)Creating New Public Group

The screenshot shows the Salesforce Setup interface. In the left sidebar, under 'Users', 'Public Groups' is selected. The main area displays a table titled 'Public Groups' with one row:

Action	Label	Group Name	Created By	Created Date
Edit Del	sales_team	sales_team	Dharshini Priya	9/8/2025, 5:30 AM

A 'New' button is visible at the top right of the table.

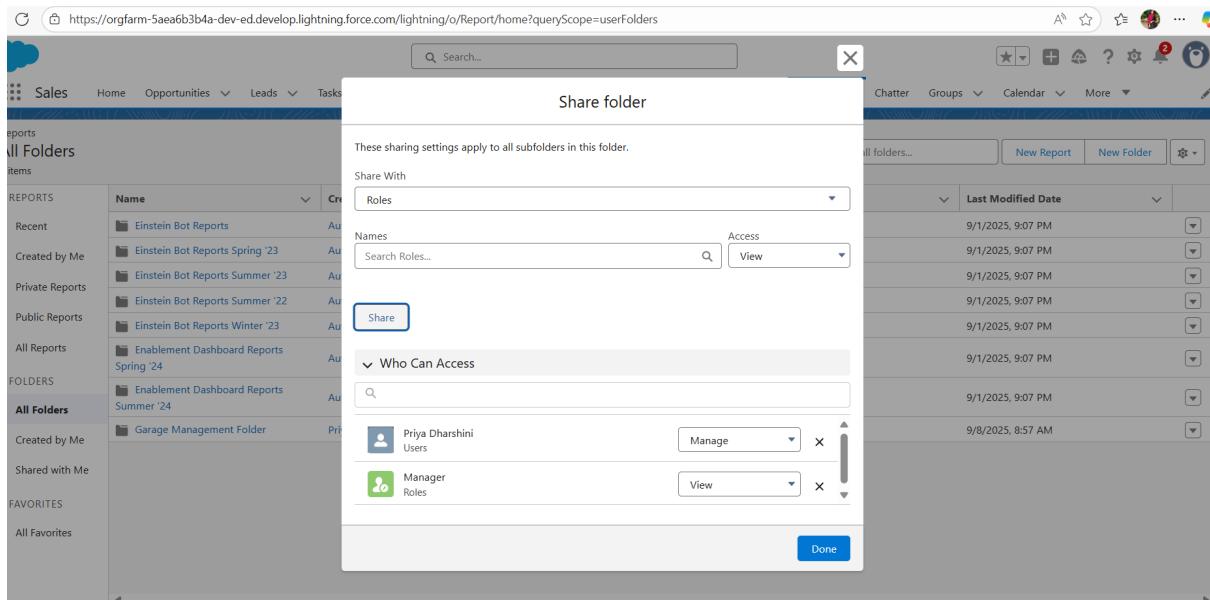
Milestone 12: Share setting

i)Creating Sharing settings

The screenshot shows the Salesforce Reports page. A modal window titled 'Create folder' is open, prompting for a 'Folder Label' (Garage Management Folder) and a 'Folder Unique Name' (GarageManagementFolder). The 'Save' button is highlighted.

Recent reports appear here
Go to All Reports to see what's available.
[View All Reports](#)

A green success message at the bottom states: 'The folder named Garage Management Folder was created.' with a checkmark icon.



Milestone 13: Flows

i) Create a Flow

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

New Automation

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

Categories

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

Frequently Used

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

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

Record-Triggered Flow Start

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

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

Run Immediately

End

Configure Start

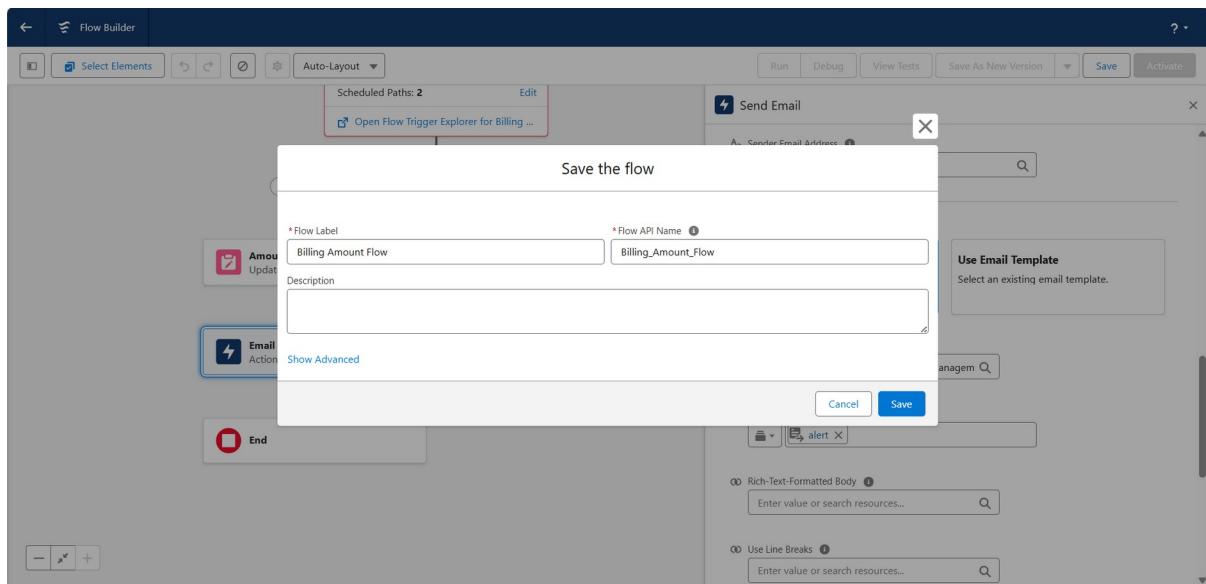
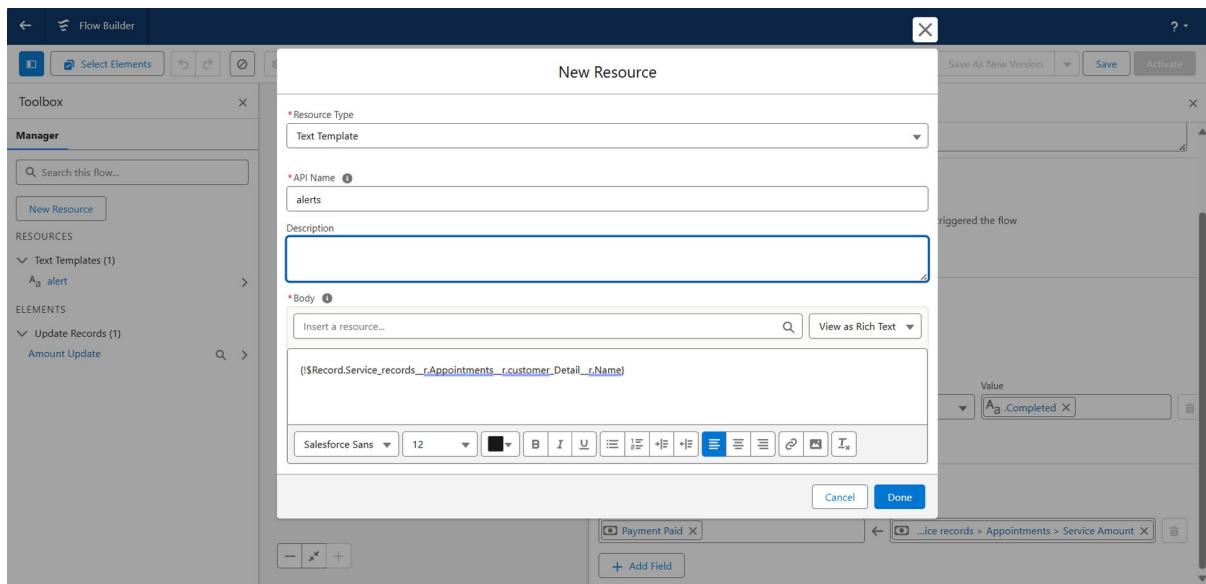
Set Entry Conditions
Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.
If you create a flow that's triggered when a record is updated, we recommend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

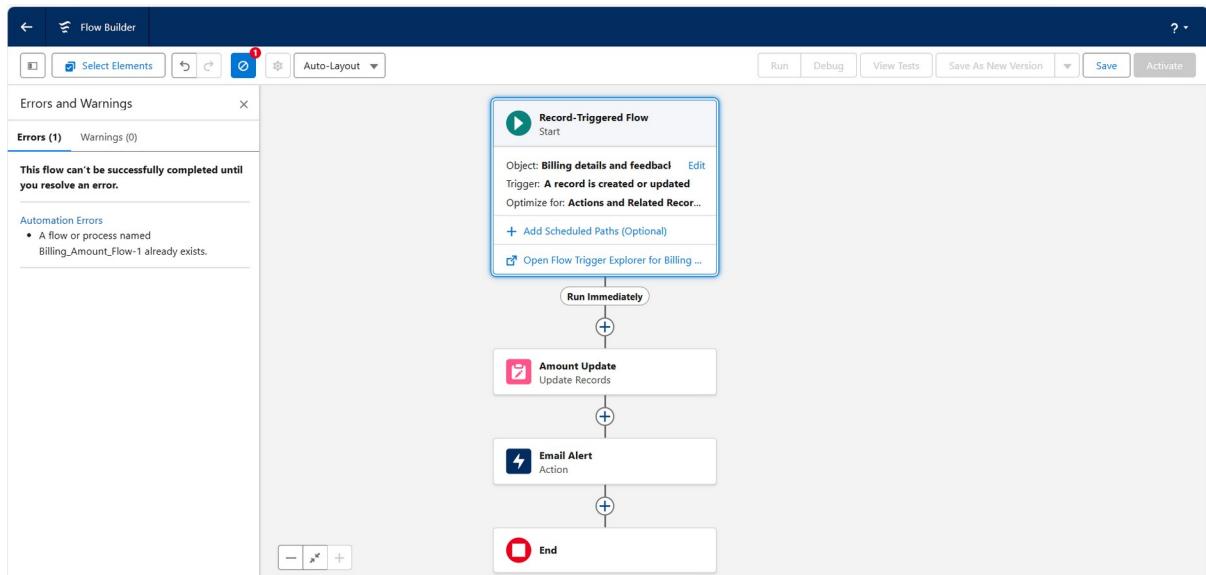
Condition Requirements: None

Optimize Flow
Optimize the Flow for:

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

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





ii) Create another Flow

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

New Automation

Get Started with Automations

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

Search automations...

Categories

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

Frequently Used

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

[View All >](#)

Save the flow

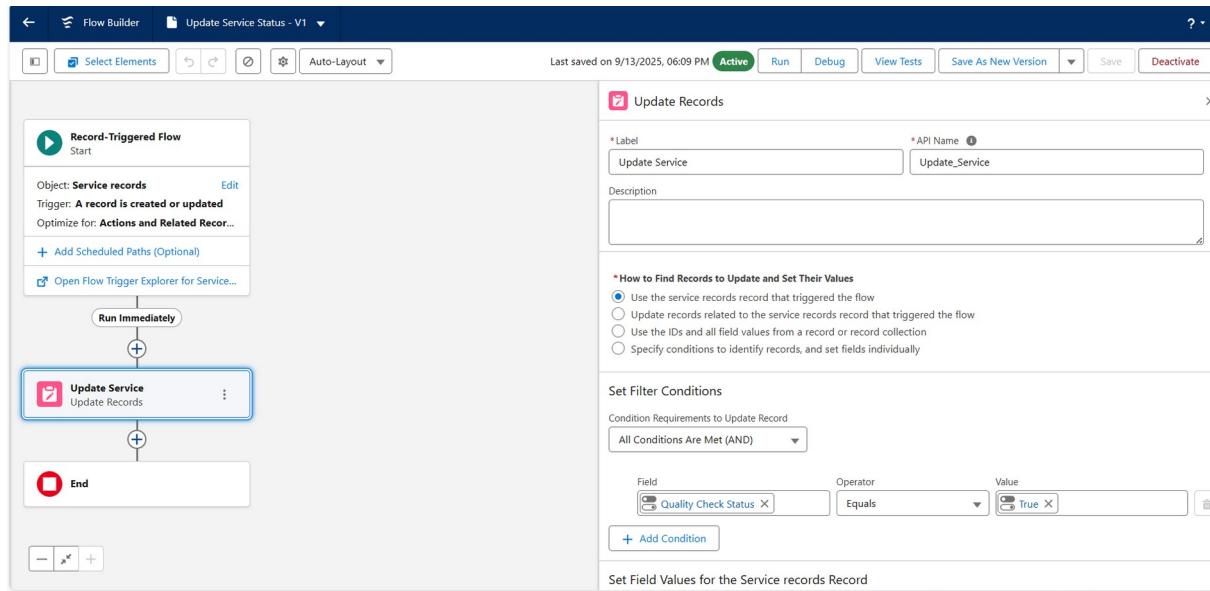
* Flow Label

* Flow API Name

Description

Show Advanced

All Conditions Are Met (AND)



Milestone 14: Apex trigger

i) Apex handler

```

trigger Handler {
    list<Appointments__c> listApp;
    Service_Records__c serList = new list <Service_records__c>();
    Appointments__c app : listApp;
    if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){
        app.Service_Amount__c = 10000;
    }
    else if(app.Maintenance service __c == true && app.Repairs __c == true){
        app.Service_Amount__c = 5000;
    }
}

```

New Apex Trigger

Name:

sObject: 

The screenshot shows the Eclipse IDE interface with the following details:

- Menu Bar:** File, Edit, Debug, Test, Workspace, Help.
- Toolbar:** Code Coverage: None, API Version: 64.
- Project Explorer:** AmountDistributionHandler.apex* (highlighted), AmountDistribution.apxt*.
- Code Editor:** The code for the AmountDistributionHandler class is displayed. It contains a static method amountDist that iterates through a list of Appointments__c records. For each record where Maintenance_service__c and Repairs__c are true, it sets Service_Amount__c to 10000. There is also a condition for when Maintenance_service__c is true and Repairs__c is false.
- Bottom Navigation:** Logs, Tests, Checkpoints, Query Editor, View State, Progress, Problems (selected).

```
1 public class AmountDistributionHandler {  
2  
3  
4  
5     public static void amountDist(list<Appointments__c> listApp){  
6  
7         list<Service_records__c> serList = new list <Service_records__c>();  
8  
9  
10    for(Appointments__c app : listApp){  
11  
12        if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){  
13            app.Service_Amount__c = 10000;  
14  
15        }  
16  
17    }  
18  
19    else if(app.Maintenance_service__c == true && app.Repairs__c == false){  
20  
21    }  
22  
23}
```

AmountDistributionHandler.apxc * AmountDistribution.apxt *

Code Coverage: None API Version: 64

```
19 ▼     else if(app.Maintenance_service__c == true && app.Repairs__c == true){  
20         app.Service_Amount__c = 5000;  
21     }  
22  
23     else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){  
24         app.Service_Amount__c = 8000;  
25     }  
26  
27     else if(app.Repairs__c == true && app.Replacement_Parts__c == true){  
28         app.Service_Amount__c = 7000;  
29     }  
30  
31     else if(app.Maintenance_service__c == true){  
32         app.Service_Amount__c = 3000;  
33     }  
34  
35     else if(app.Replacement_Parts__c == true){  
36         app.Service_Amount__c = 4000;  
37 }  
38  
39     else if(app.Maintenance_service__c == true && app.Repairs__c == true){  
40         app.Service_Amount__c = 5000;  
41     }  
42  
43     else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){  
44         app.Service_Amount__c = 8000;  
45     }  
46  
47     else if(app.Repairs__c == true && app.Replacement_Parts__c == true){  
48         app.Service_Amount__c = 7000;  
49     }  
50  
51     else if(app.Maintenance_service__c == true){  
52         app.Service_Amount__c = 3000;  
53     }  
54  
55     else if(app.Replacement_Parts__c == true){  
56         app.Service_Amount__c = 4000;  
57 }  
58  
59     else if(app.Maintenance_service__c == true && app.Repairs__c == true){  
60         app.Service_Amount__c = 5000;  
61     }  
62  
63     else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){  
64         app.Service_Amount__c = 8000;  
65     }  
66  
67     else if(app.Repairs__c == true && app.Replacement_Parts__c == true){  
68         app.Service_Amount__c = 7000;  
69     }  
70  
71     else if(app.Maintenance_service__c == true){  
72         app.Service_Amount__c = 3000;  
73     }  
74  
75     else if(app.Replacement_Parts__c == true){  
76         app.Service_Amount__c = 4000;  
77 }  
78  
79     else if(app.Maintenance_service__c == true && app.Repairs__c == true){  
80         app.Service_Amount__c = 5000;  
81     }  
82  
83     else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){  
84         app.Service_Amount__c = 8000;  
85     }  
86  
87     else if(app.Repairs__c == true && app.Replacement_Parts__c == true){  
88         app.Service_Amount__c = 7000;  
89     }  
90  
91     else if(app.Maintenance_service__c == true){  
92         app.Service_Amount__c = 3000;  
93     }  
94  
95     else if(app.Replacement_Parts__c == true){  
96         app.Service_Amount__c = 4000;  
97 }  
98  
99     else if(app.Maintenance_service__c == true && app.Repairs__c == true){  
100        app.Service_Amount__c = 5000;  
101    }  
102  
103    else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){  
104        app.Service_Amount__c = 8000;  
105    }  
106  
107    else if(app.Repairs__c == true && app.Replacement_Parts__c == true){  
108        app.Service_Amount__c = 7000;  
109    }  
110  
111    else if(app.Maintenance_service__c == true){  
112        app.Service_Amount__c = 3000;  
113    }  
114  
115    else if(app.Replacement_Parts__c == true){  
116        app.Service_Amount__c = 4000;  
117 }
```

Logs Tests Checkpoints Query Editor View State Progress Problems

Name	Line	Problem

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

Logs Tests Checkpoints Query Editor View State Progress Problems

```
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;

    }

}

```

CODE FOR APEX TRIGGER:

```

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

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

    AmountDistributionHandler.amountDist(Trigger.new);

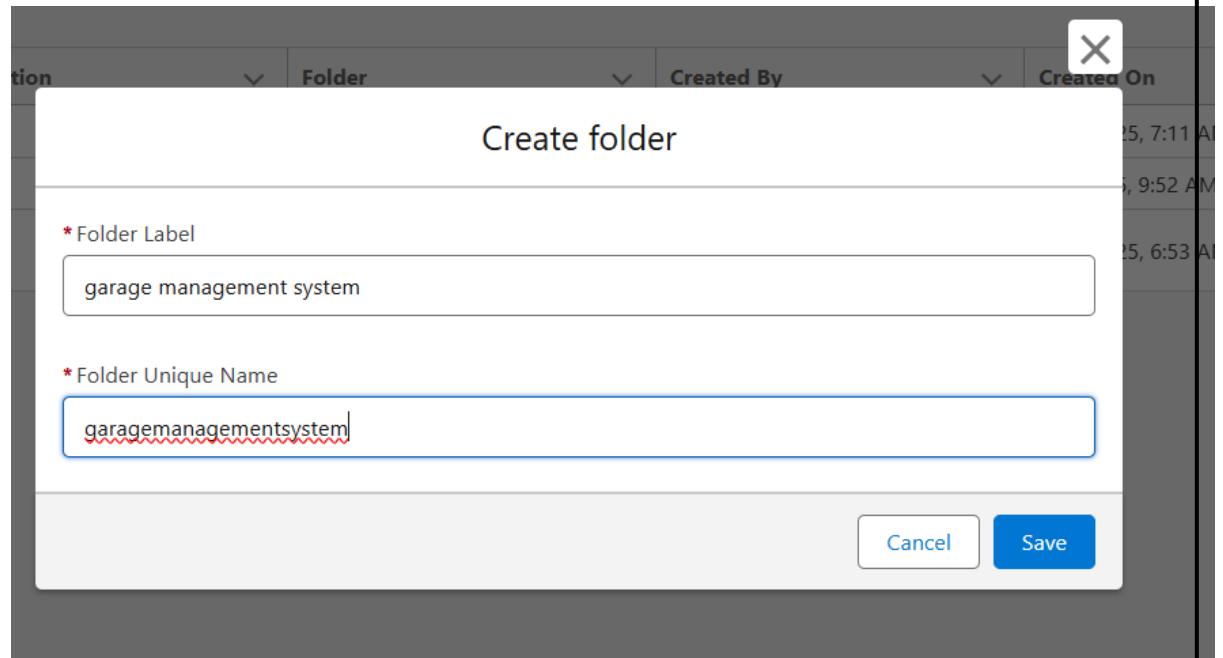
}

}

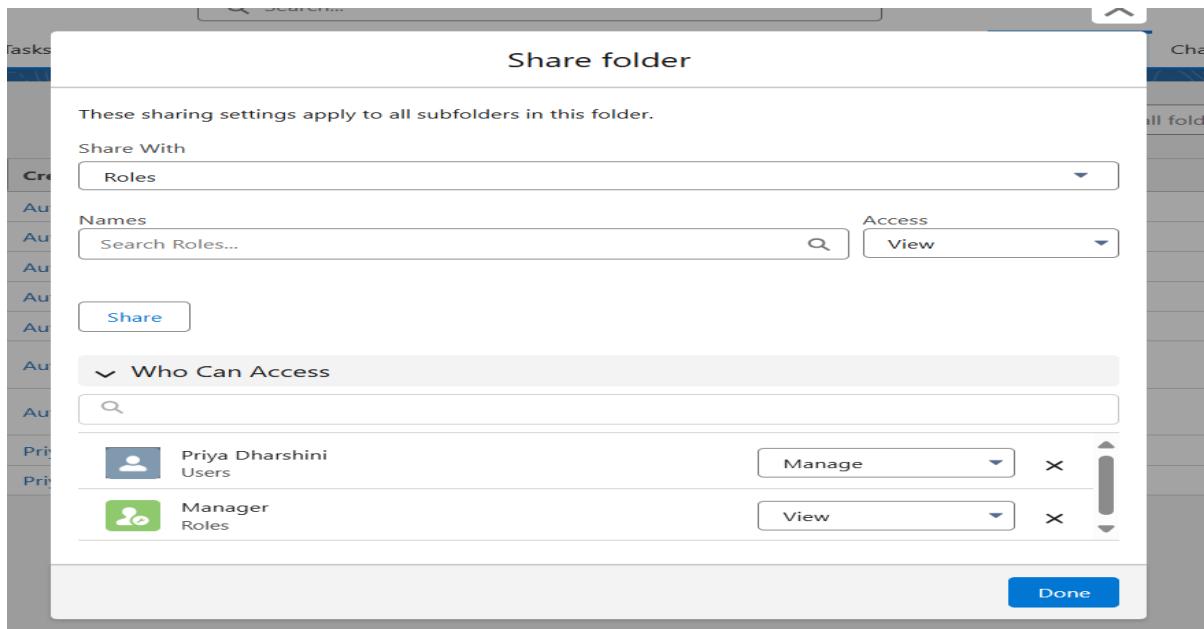
```

Milestone 15: Reports

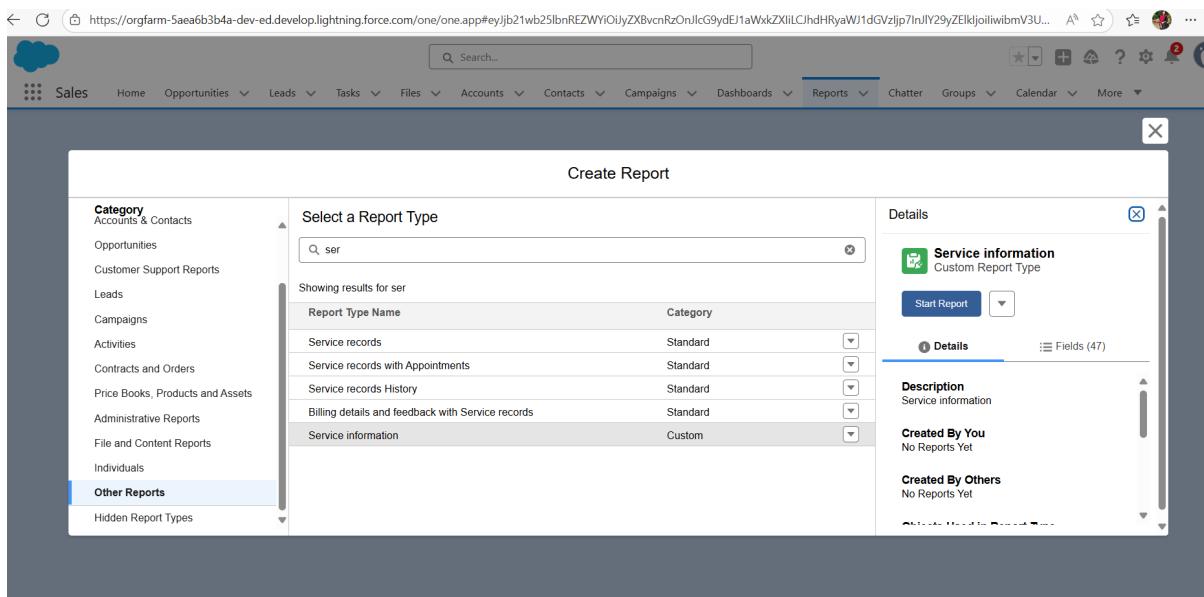
i)create a report folder



ii) Sharing a report folder



iii) Create report type



iv) Create report

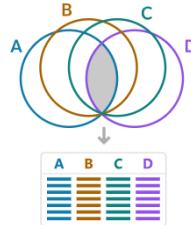
Details

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

Object Relationships

customer Detail (A)

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



Fields

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

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

REPORT ▾ New Service information Report Service information

Outline Filters 

Groups  GROUP ROWS Add group... 

Columns  Add column... 

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

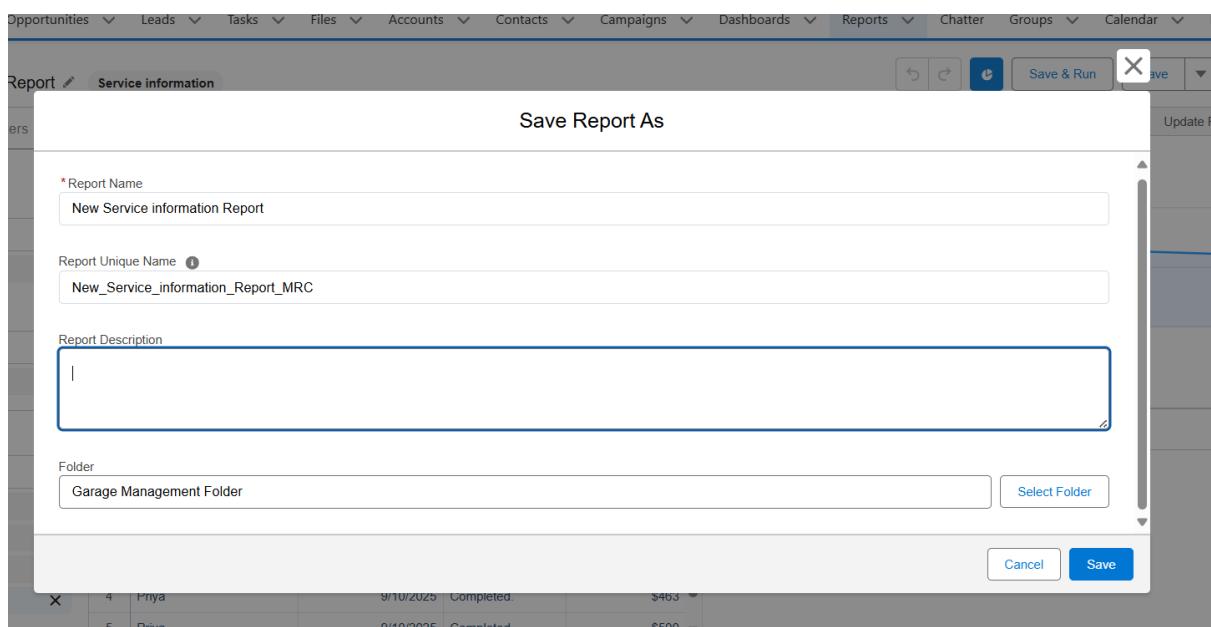
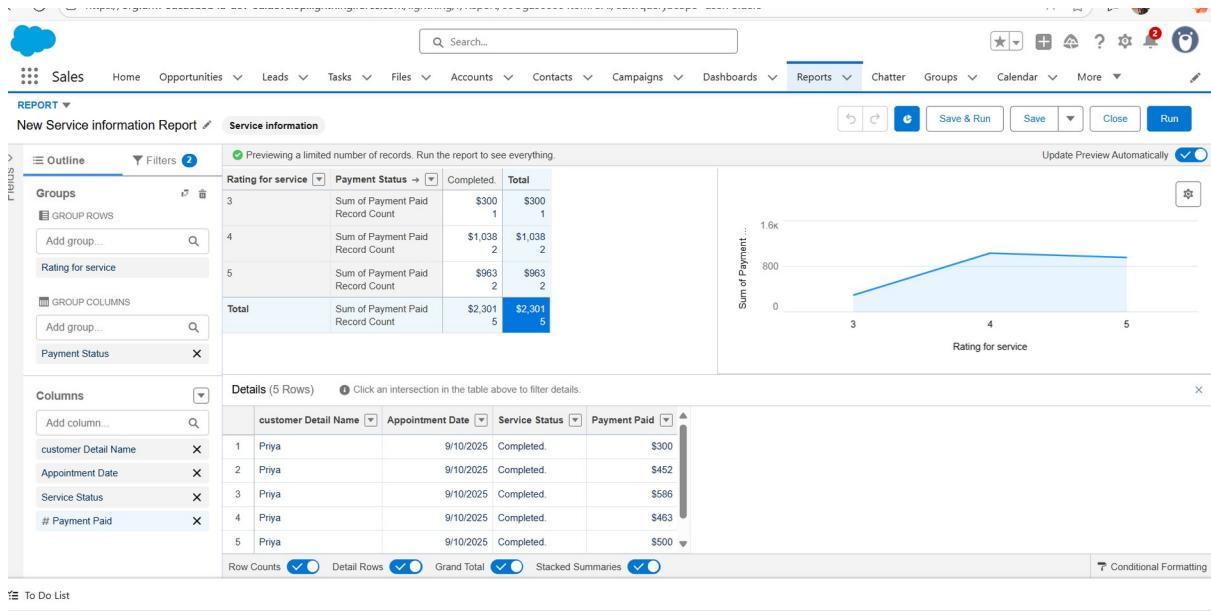
Previews a limited number of records. Run the report to see everything. Update Preview Automatically

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.

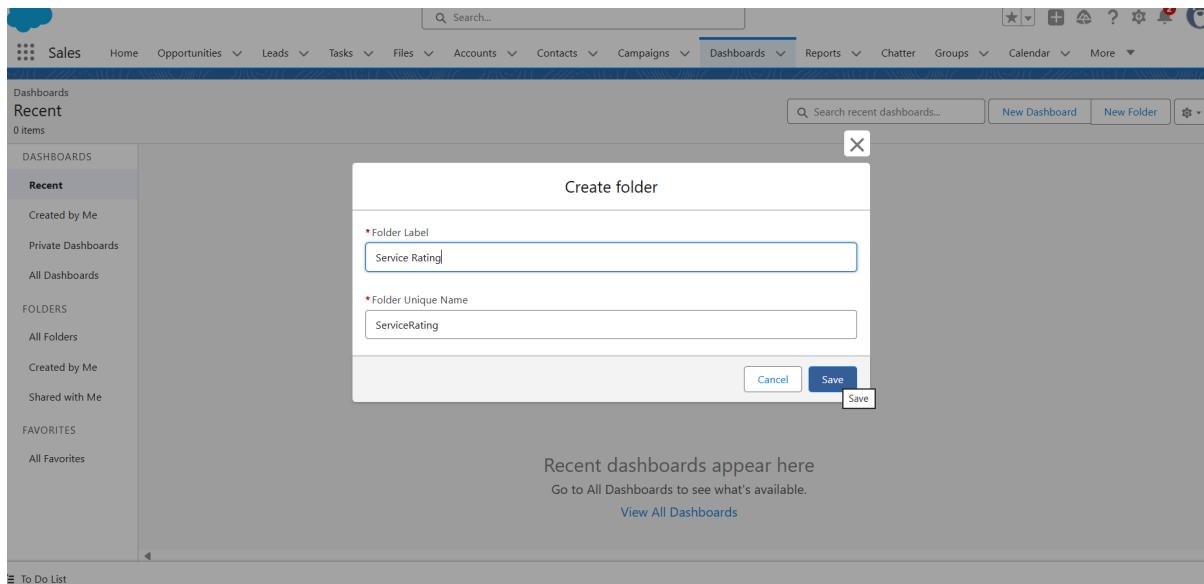
Add Chart Save & Run Save Close Run

Downloaded by HAVOC SABARI (sn955885@gmail.com)

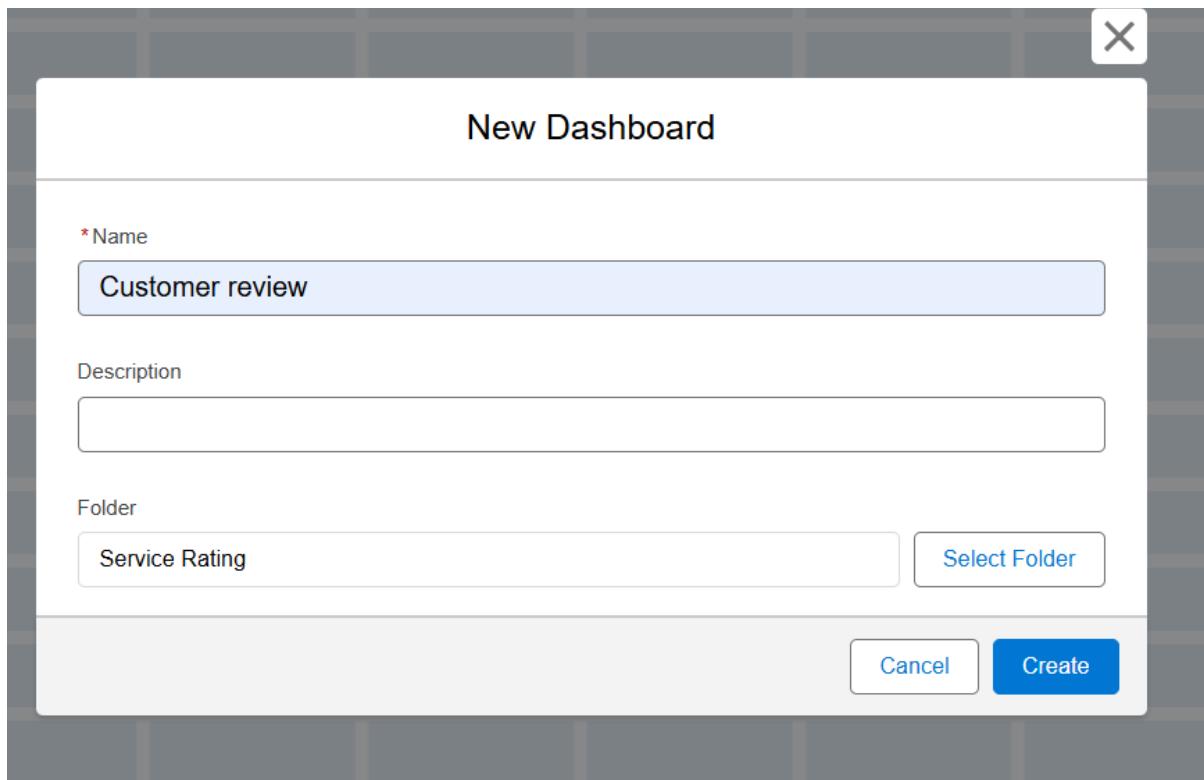


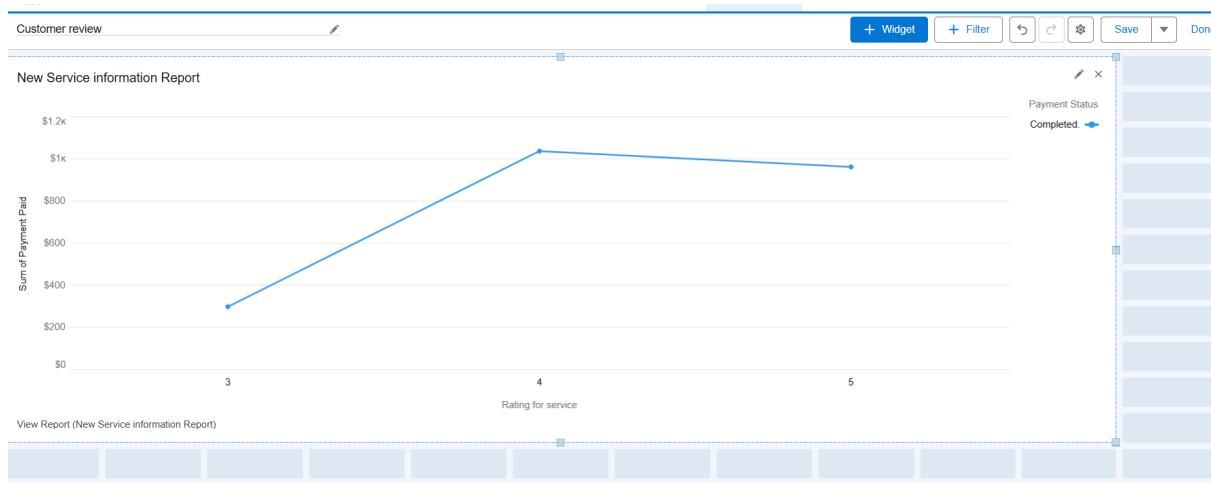
Milestone 16: Dashboards

i) Create Dashboard Folder



ii) Create Dashboard





Schedule dashboard refreshes and subscribe to receive results.

Settings

Frequency

Daily Weekly Monthly

Days

Sun Mon Tue Wed Thu Fri Sat

Time

3:00 PM

Recipients

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

Receive new results by email when dashboard is refreshed. ⓘ

Send email to

Me

[Edit Recipients](#)

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

Milestone 17: User Adoption

i)creating records

This screenshot shows a customer detail record for 'mac'. The 'Details' tab is selected, displaying fields such as Name (mac), Phone ((567) 876-5567), Email (mac@gmail.com), and Created By (Priya Dharshini). The 'Owner' field shows Priya Dharshini. The 'Activity' sidebar is visible on the right.

This screenshot shows an appointment record for 'Appointment #001'. The 'Details' tab is selected, displaying fields like Appointments Name (Appointment #001), Customer Detail (mac), Maintenance service (checkbox checked), Repairs (checkbox checked), Replacement Parts (checkbox checked), Appointment Date (9/10/2025), Service Amount (\$500), and Vehicle number plate (TS30EU0443). The 'Owner' field shows Priya Dharshini. The 'Activity' sidebar is visible on the right.

New Service records

* = Required Information

Information

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

[Cancel](#) [Save & New](#) [Save](#)

https://virginia-dev00044-dev-ed.developingunit.force.com/lightning/service_records/_a0yL00000jYRQz7/view

Garage Management

Service records
ser-109

Related Details

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

