

# **Garage Management system**

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# 1.INTRODUCTION

## 1.1 Project Overview

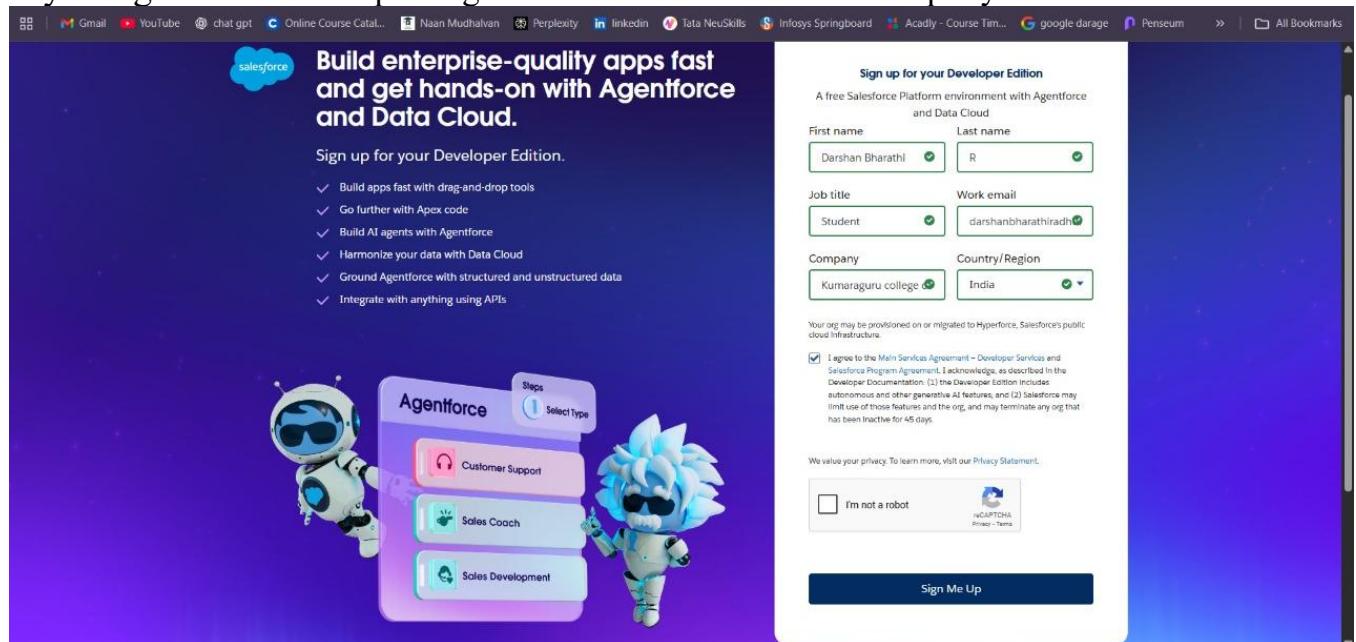
The **Garage Management System** developed in Salesforce is designed to streamline key garage operations, including vehicle servicing, repair tracking, and spare parts management. The system facilitates efficient management of customer information, enables monitoring of mechanic performance, and automates the generation of invoices. Additionally, through customized reports and interactive dashboards, it enhances operational efficiency, supports data-driven decision-making, and contributes to improved customer satisfaction.

## 1.2 Purpose

The purpose of the **Garage Management System** in Salesforce is to simplify and automate garage operations such as service tracking, spare parts usage, billing, and customer management. The system is intended to generate accurate reports and dashboards for effective monitoring, improve mechanic efficiency, and enhance customer satisfaction through organized and timely services.

## Creating Developer Account:

By using this URL - <https://orgfarm-8ec29d49f4-dev-ed.develop.my.salesforce.com>



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

The screenshot shows the Salesforce Object Manager interface for the 'Customer Details' object. The left sidebar lists various configuration tabs: Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main 'Details' pane shows the following configuration:

- Description:** Customer Details
- API Name:** Customer\_Details\_\_c
- Custom:** ✓
- Singular Label:** Customer Details
- Plural Label:** Customer Details
- Enable Reports:** ✓
- Track Activities:**
- Track Field History:** ✓
- Deployment Status:** Deployed
- Help Settings:** Standard salesforce.com Help Window

The URL in the browser bar is: <https://orgfarm-f331f6164a-dev-ed.lightning.force.com/one/one.app#/setup/ObjectManager/01lgL000001nfB7/FieldsAndRelationships/view>

The screenshot shows the Salesforce Object Manager interface for the 'Service records' object. The left sidebar lists various configuration tabs: 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, and Object Access. The main 'Details' pane shows the following configuration:

- Description:** Service records
- API Name:** Service\_records\_\_c
- Custom:** ✓
- Singular Label:** Service records
- Plural Label:** Service records
- Enable Reports:** ✓
- Track Activities:**
- Track Field History:** ✓
- Deployment Status:** Deployed
- Help Settings:** Standard salesforce.com Help Window

Setup | Home | Object Manager

Object Manager > Billing details and feedback

**Details**

Description

API Name: ser\_000\_c

Custom ✓

Singular Label: Billing details and feedback

Plural Label: Billing details and feedback

**Details**

Enable Reports ✓

Track Activities

Track Field History ✓

Deployment Status Deployed

Help Settings Standard salesforce.com Help Window

<https://orgfarm-f331f6164a-dev-ed.lightning.force.com/one/one.app#/setup/ObjectManager/01gL000001ngLh/ButtonsLinksActions/view>

Setup | Home | Object Manager

Object Manager > Appointment

**Details**

Description

API Name: Appointment\_\_c

Custom ✓

Singular Label: Appointment

Plural Label: Appointments

**Details**

Enable Reports ✓

Track Activities

Track Field History ✓

Deployment Status Deployed

Help Settings Standard salesforce.com Help Window

<https://orgfarm-f331f6164a-dev-ed.lightning.force.com/one/one.app#/setup/Object...>

- Configured fields and relationships

The screenshot shows the Salesforce Object Manager interface for the 'Appointment' object. The left sidebar lists various configuration options: Details, Fields & Relationships (selected), 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, and Object Access. The main content area displays the 'Fields & Relationships' section, which lists 13 items sorted by Field Label. The table columns are: FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED. The data includes:

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_Name_c	Lookup(Appointment)		
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		

This screenshot is identical to the one above, showing the 'Fields & Relationships' section for the 'Appointment' object in the Salesforce Object Manager. The left sidebar and the table structure are the same, listing 13 fields with their respective details and indexing status.

# Creating a Custom Tab

The screenshot shows the Salesforce Setup interface with the 'Tabs' tab selected under the 'Tableau' category in the left sidebar. The main content area displays sections for 'Custom Tabs', 'Custom Object Tabs', 'Web Tabs', 'Visualforce Tabs', and 'Lightning Component Tabs'. Under 'Custom Object Tabs', there are four entries: 'Appointments' (Tab Style: Apple), 'Billing details and feedback' (Tab Style: Box), 'Customer Details' (Tab Style: Books), and 'Service records' (Tab Style: Castle). A message at the bottom left says 'Didn't find what you're looking for? Try using Global Search.'

The screenshot shows the Lightning App Builder interface with the 'Garage Management Application' selected. In the left sidebar, 'App Details & Branding' is selected under 'App Settings'. The main content area shows the 'App Details & Branding' section, which includes fields for 'App Name' (Garage Management Application), 'Developer Name' (Garage\_Management\_Application), and 'Description' (Enter a description...). It also features an 'Image' upload field with a preview, a color picker for 'Primary Color Hex Value' (#0070D2), and a checkbox for 'Org Theme Options' (Use the app's image and color instead of the org's custom theme). Below this is an 'App Launcher Preview' section showing a blue square icon with 'GM' and the app name.

# VALIDATION RULES

## DUPLICATE RULES

The screenshot shows the Salesforce Setup interface under the Object Manager. A validation rule named "rating\_should\_be\_less\_than\_5" is displayed. The rule checks if the Rating for service field is NOT( REGEX( Rating\_for\_service\_c , '[1-5]' ) ). It has an error message stating "rating should be from 1 to 5". The rule is active and was created by bevankishor\_m on 8/28/2025 at 4:41 AM.

Field	Value
Rule Name	rating_should_be_less_than_5
Error Condition Formula	NOT( REGEX( Rating_for_service_c , '[1-5]' ) )
Error Message	rating should be from 1 to 5
Description	
Created By	bevankishor_m 8/28/2025, 4:41 AM
Modified By	bevankishor_m 8/28/2025, 4:41 AM

# PROFILE:

The screenshot shows the Salesforce Setup interface under the Profiles section. The Standard User profile is selected. The profile has a name of "Standard User", a user license of "Salesforce", and was created by "salesforce.com, Inc." on 8/24/2025 at 2:50 PM. The profile is assigned to a custom profile and was modified by "bevankishor\_m" on 8/29/2025 at 10:01 PM.

**Profile Detail**

Name	Standard User	Custom Profile	Modified By
User License	Salesforce	<input type="checkbox"/>	bevankishor_m
Created By	salesforce.com, Inc. 8/24/2025, 2:50 PM		bevankishor_m 8/29/2025, 10:01 PM

**Page Layouts**

Object	Layout	Assignment
Global	Global Layout [View Assignment]	Location Group Assignment [View Assignment]
Email Application	Not Assigned [View Assignment]	Macro [View Assignment]
Home Page Layout	Home Page Default [View Assignment]	Object Milestone [View Assignment]
Account	Account Layout [View Assignment]	Operating Hours [View Assignment]
Alternative Payment Method	Alternative Payment Method Layout [View Assignment]	Opportunity [View Assignment]
Appointment Invitation	Appointment Invitation Layout [View Assignment]	Opportunity Product [View Assignment]
Asset	Asset Layout [View Assignment]	Order [View Assignment]

## ROLES:

The screenshot shows the Salesforce Setup interface with the 'Roles' page selected. The left sidebar includes sections like Users, Feature Settings, Service, and Case Teams. The main content area displays the 'Creating the Role Hierarchy' section, which lists various roles under 'Your Organization's Role Hierarchy'. The hierarchy includes roles such as CEO, CFO, COO, Manager, sales person, SVP, Customer Service & Support, Customer Support International, Customer Support North America, Installation & Repair Services, SVP Human Resources, and SVP Sales & Marketing. Each role entry has options to Add Role, Edit, Delete, or Assign.

## USERS:

The screenshot shows the Salesforce Setup interface with the 'Users' page selected. The left sidebar includes sections like Permission Set Groups, Profiles, Public Groups, Queues, Roles, User Management Settings, and User. The main content area displays the 'All Users' section, which lists various users with their details, roles, and status. The table includes columns for Action, Full Name, Alias, Username, Role, Active, and Profile. A search bar at the top allows filtering by name, and a navigation bar below the table provides links for New User, Reset Password(s), and Add Multiple Users.

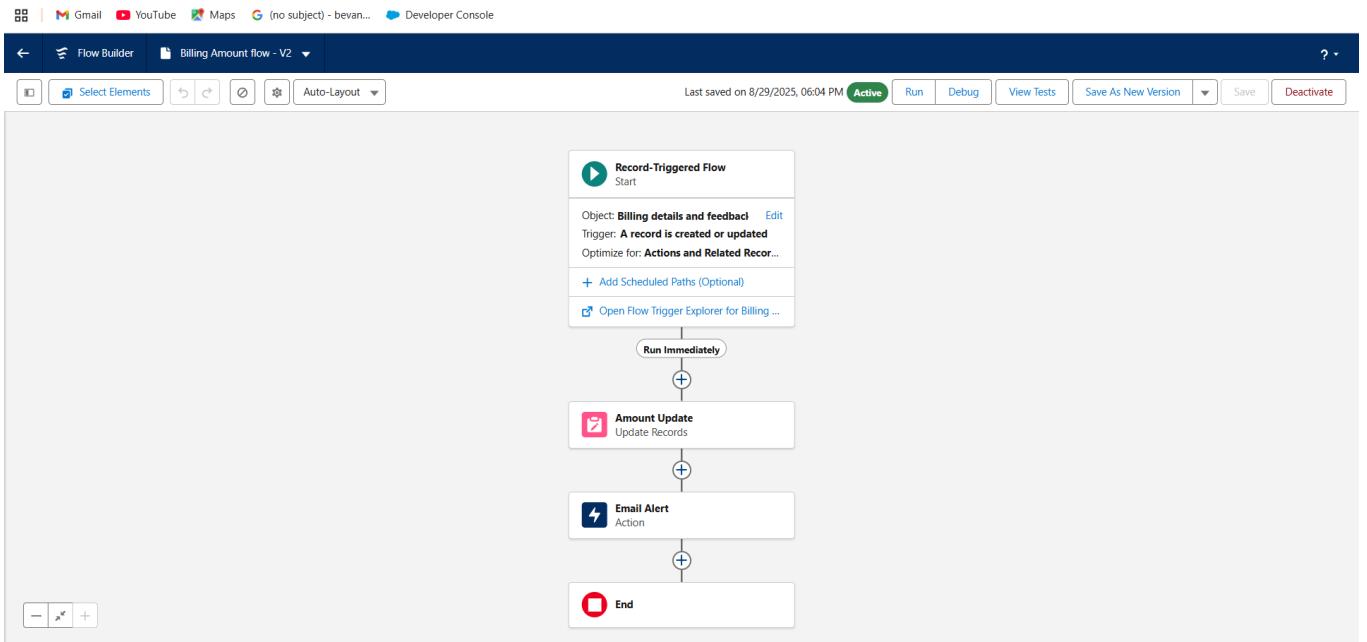
Action	Full Name	Alias	Username	Role	Active	Profile
<input type="checkbox"/>	Chatter Expert	Chatter	chatty00dg000005xhcmuaau.y3dpufopch@chatter.salesforce.com	sales_person	<input checked="" type="checkbox"/>	Chatter Free User
<input type="checkbox"/>	cvds_dvord	dvds	23csbevan2ar@acascbe.edu.in		<input checked="" type="checkbox"/>	sales person
<input type="checkbox"/>	dby_ddby	dby	231csbevan2hizbar@acascbe.edu.in		<input checked="" type="checkbox"/>	Chatter External User
<input type="checkbox"/>	EPIC_OrgFarm	OEPI	epic.b05d93650ecf@orgfarm.salesforce.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	m_beavankishor	23c	23csbevan2hizbar@agentforca.com		<input checked="" type="checkbox"/>	System Administrator
<input type="checkbox"/>	Mikaelsen_Niklaus	nmika	beavankishor@acascbe.com	Manager	<input checked="" type="checkbox"/>	Manager
<input type="checkbox"/>	User_Integration	Integ	integration@00dg000009xhcmuaau.com		<input checked="" type="checkbox"/>	Analytics Cloud Integration User
<input type="checkbox"/>	User_Security	sec	insightssecurity@00dg000009xhcmuaau.com		<input checked="" type="checkbox"/>	Analytics Cloud Security User

## PUBLIC GROUP:

https://orgfarm-f331f6164a-dev-ed.develop.lightning.force.com/lightning/setup/PublicGroups/home

## Sharing Setting:

- Implemented Flows for monthly rent and payment success



## Apex:

The screenshot shows the Salesforce Developer Console interface. The top navigation bar includes links for Gmail, YouTube, Maps, and a developer console. The main area displays the code for `AmountDistributionHandler.apxc`. The code defines a class with a static method `amountDist` that iterates through a list of `Appointment__c` records and sets the `Service_Amount__c` field to 10000 for specific conditions related to maintenance, repairs, and replacement parts.

```
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    for(Appointment__c app : listApp){  
11  
12        if(app.Maintenance_service__c == true && app.Repairs__c == true && app.Replacement_Parts__c == true){  
13  
14            app.Service_Amount__c = 10000;  
15  
16    }  
17}
```

The bottom section of the interface shows a log table with columns for User, Application, Operation, Time, Status, Read, and Size. A filter input field "Click here to filter the log list" is also present.

The screenshot shows the Salesforce Developer Console interface. The top navigation bar includes links for Gmail, YouTube, Maps, and a developer console. The main area displays the code for `AmountDistribution.apxt`. The code defines a trigger `AmountDistribution` on the `Appointment__c` object that runs before insert or update operations. It calls the `amountDist` method from the `AmountDistributionHandler` class on the `trigger.new` records.

```
1 trigger AmountDistribution on Appointment__c (before insert, before update) {  
2  
3  
4  
5     if(trigger.isbefore && trigger.isinsert || trigger.isupdate){  
6  
7         AmountDistributionHandler.amountDist(trigger.new);  
8  
9  
10    }  
11  
12  
13  
14  
15}
```

The bottom section of the interface shows a log table with columns for User, Application, Operation, Time, Status, Read, and Size. A filter input field "Click here to filter the log list" is also present.

## Reports:

The screenshot shows the Salesforce Reports interface. On the left, a sidebar lists categories: REPORTS, FOLDERS, and FAVORITES. Under REPORTS, 'Created by Me' is selected. The main area displays a table titled 'Created by Me' with one item: 'Garage Management Folder' created by Darshan Bharathi R on 9/13/2025, 5:29 AM.

Name	Created By	Created On	Last Modified By	Last Modified Date
Garage Management Folder	Darshan Bharathi R	9/13/2025, 5:29 AM	Darshan Bharathi R	9/13/2025, 5:29 AM

The screenshot shows the Salesforce Setup interface. The left sidebar is under 'Analytics' and 'Report Types'. A success message at the top right says 'Report type Service information was created.' The main area is titled 'Custom Report Types' and shows a 'Service information' record. The 'Details' section contains fields: Display Label (Service information), API Name (Service\_information), Description (Service information), Created By (Darshan Bharathi R, 9/13/25, 6:13 PM), Store in Category (other), Deployment (Deployed), and Modified By (Darshan Bharathi R, 9/13/25, 6:13 PM). The 'Object Relationships' section shows relationships with 'Customer Details (A)', 'Appointments (B)', 'Service records (C)', and 'Billing details and fr (D)'. Buttons at the bottom right include 'Preview Layout', 'Edit Layout', 'Clone', 'Delete', and 'Close'.

Setup Home Object Manager

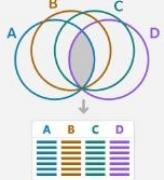
Select related objects to define which records are included in reports using this report type.

**A Customer Details** Primary Object

**B Appointments** A to B Relationship:  
 Each "A" record must have at least one related "B" record.  
 "A" records may or may not have related "B" records.

**C Service records** B to C Relationship:  
 Each "B" record must have at least one related "C" record.  
 "B" records may or may not have related "C" records.

**D Billing details and feedback** C to D Relationship:  
 Billing details and feedback



Cancel Save

Gmail YouTube Maps (no subject) - bevan... Developer Console

Garage Management Reports Dashboards

**REPORT** New Service information Report

Service information

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

Rating for service Payment Status Total

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

No results found

Details (0 Rows) Click an intersection in the table above to filter details.

Customer Name	Appointment Name	Appointment Date	Service Status	Payment Paid
---------------	------------------	------------------	----------------	--------------

Row Counts Detail Rows Grand Total Stacked Summaries Conditional Formatting



Gmail YouTube Maps Google (no subject) - bevan... Developer Console

Search...

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

Dashboards

Recent 2 items

Dashboard Name Description Folder Created By Created On Subscribed

DASHBOARDS	Dashboard Name	Description	Folder	Created By	Created On	Subscribed
Recent	Service Rating dashboard	Service Rating dashboard	bevankishor m	8/28/2025, 11:20 PM	✓	
Created by Me	customer review	Service Rating dashboard	bevankishor m	8/28/2025, 11:47 PM	✓	

Private Dashboards

All Dashboards

FOLDERS

All Folders

Created by Me

Shared with Me

FAVORITES

All Favorites

The screenshot shows the Microsoft Dynamics 365 Customer Engagement (CRM) interface. At the top, there is a navigation bar with links to Gmail, YouTube, Maps, and a developer console. The main header includes the 'Garage Management' logo and a search bar. Below the header, a blue ribbon menu offers options like Customer Details, Appointments, Service records, Billing details and feedback, Reports, and Dashboards. The main content area displays a 'Recently Viewed' list for 'Customer Details'. The list contains six items, each with a checkbox and a name: 1. mac, 2. VP of Services, 3. bevankishorj, 4. tgdjudcb, 5. JEEVITHA, and 6. GFBXBX. To the right of the list are various action buttons: New, Import, Change Owner, Assign Label, and a search bar labeled 'Search this list...'. There are also icons for filtering, sorting, and other list management functions.

# **ADVANTAGES & DISADVANTAGES**

## **✓ Advantages**

- Automates core garage operations such as billing, service tracking, and inventory management.
  - Delivers real-time reports and dashboards to support better decision-making.
  - Enhances mechanic productivity and customer satisfaction.
  - Minimizes errors associated with manual record-keeping.
  - Offers scalability and customization within Salesforce.
- 

## **⚠ Disadvantages**

- Requires appropriate Salesforce setup and customization expertise.
  - Dependent on internet connectivity; cannot function offline.
  - Initial implementation and licensing involve significant costs.
  - Staff training is necessary for effective system usage.
- 

# **CONCLUSION**

The Garage Management System in Salesforce offers an efficient and reliable platform for managing garage operations. By consolidating service tracking, inventory management, and reporting within a single system, it minimizes manual effort and strengthens decision-making. While it requires investment and training, the long-term advantages of enhanced productivity, accuracy, and customer satisfaction make it a valuable solution for modern garage businesses.

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## APPENDIX

Syntax For creating trigger :

The syntax for creating trigger is :

Trigger [trigger name] on [object name]( Before/After event)

{

}

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

```
    if(trigger.isbefore && trigger.isinsert || trigger.isupdate){
```

```
        AmountDistributionHandler.amountDist(trigger.new);
```

}

}