

OXFORD ENGINEERING COLLEGE

Department of (B.tech/information technology)

PROJECT TITLE: Garage Management System

Submitted By :

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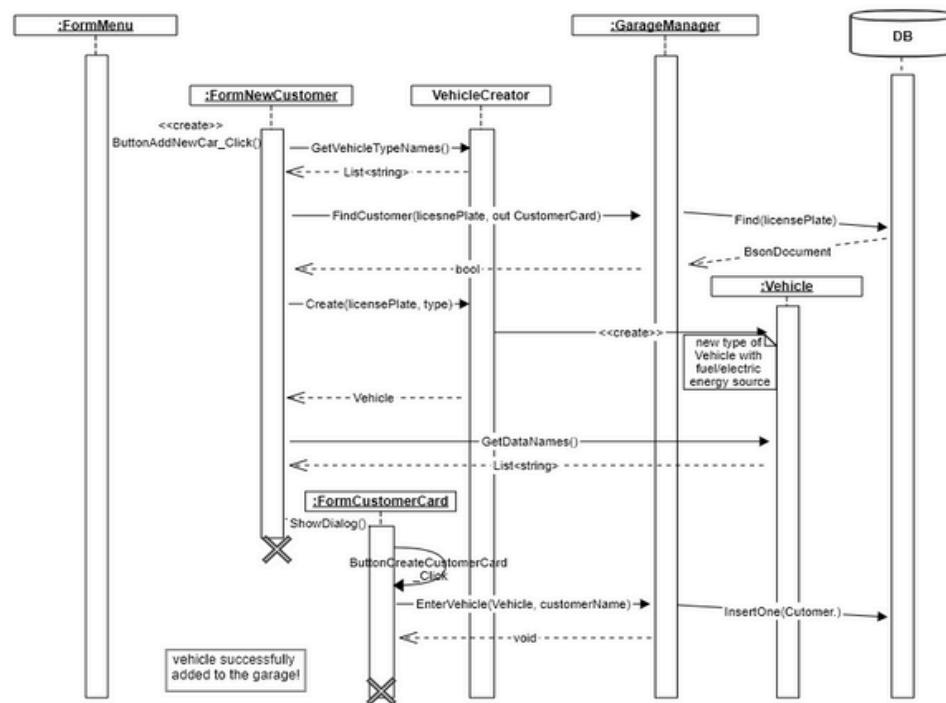
Guided By :

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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 :

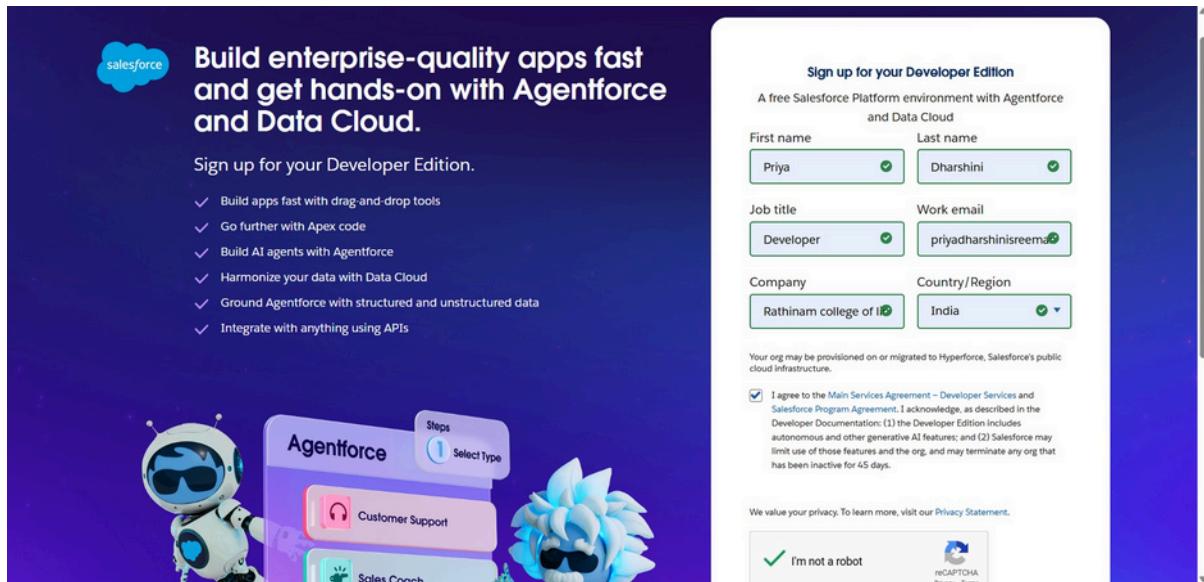
The **purpose of garage management** is to ensure the **efficient, safe, and cost-effective operation** of a garage—whether it's an automotive repair shop, service center, or fleet maintenance facility. It involves organizing and overseeing all aspects of the garage's operations to deliver high-quality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

Milestone 1: Salesforce

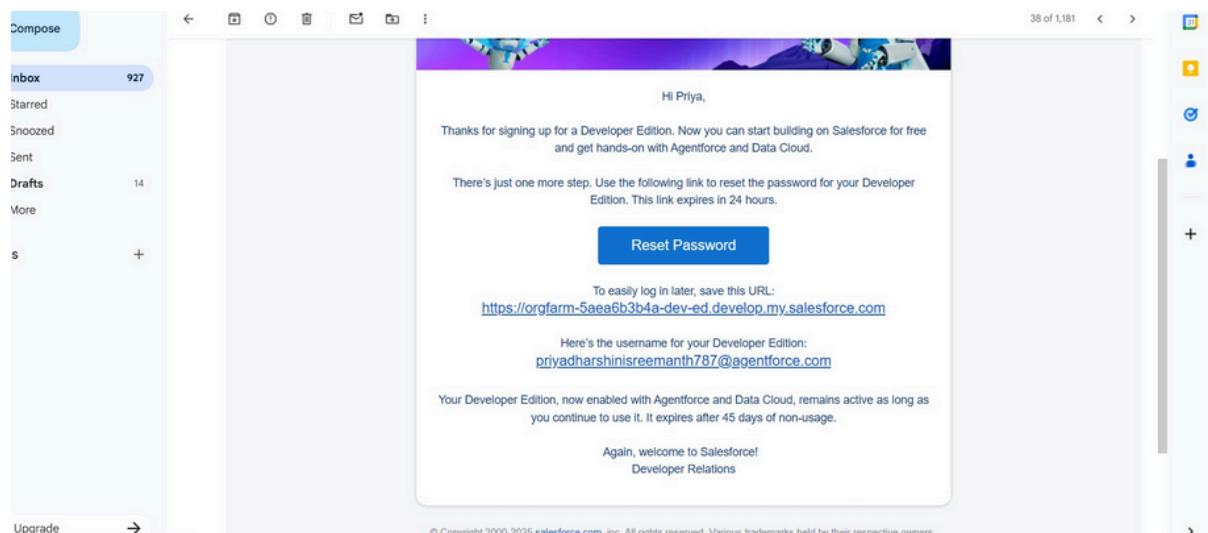
i) Creating Developer Account:

Using this URL-

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

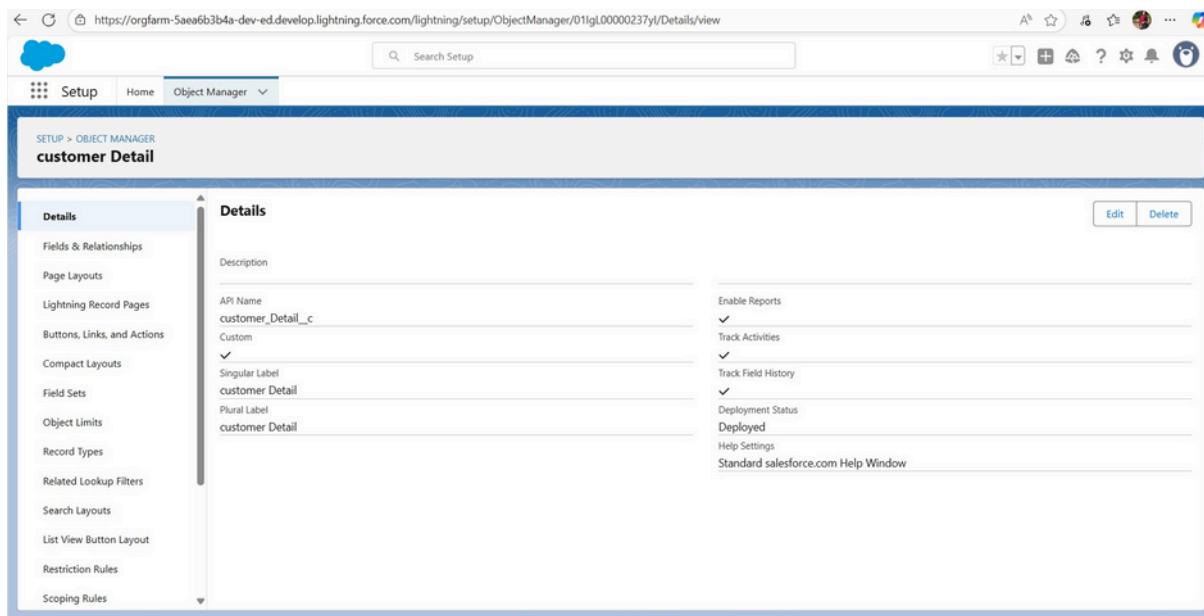


ii) Account Activation



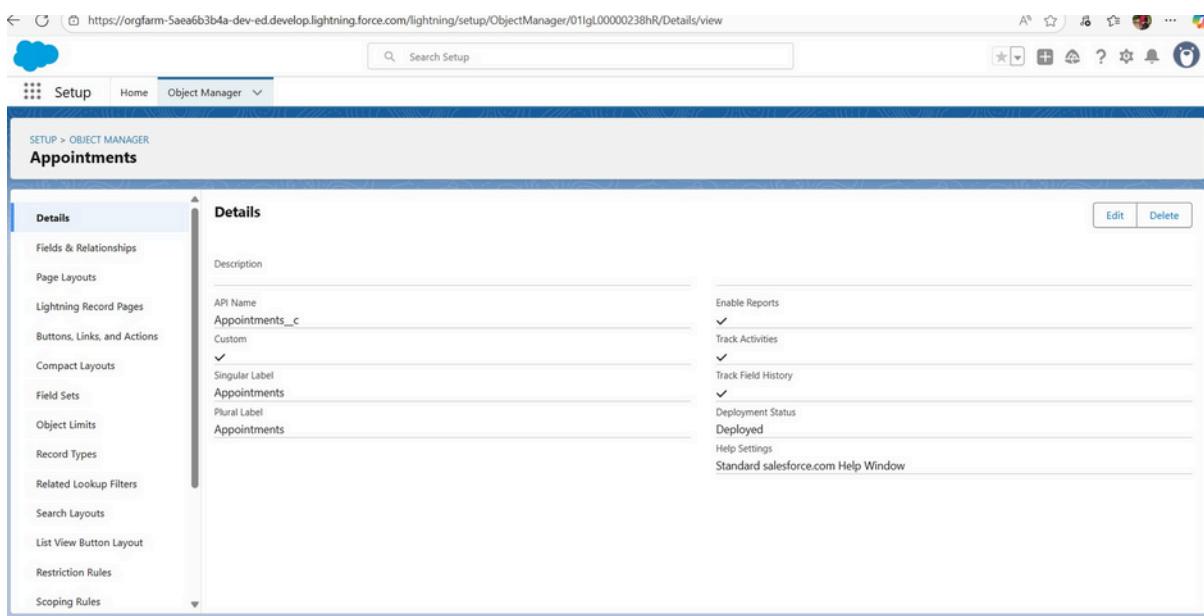
Milestone 2: Object

i)Creating customer detail:



The screenshot shows the Salesforce Setup interface for creating a new object. The URL is https://orgfarm-5aea6b3b4a-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgL00000237yl/Details/view. The page title is "customer Detail". The left sidebar lists various object configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main "Details" tab is selected. The "Description" field is empty. The "API Name" field contains "customer_detail_c". Under "Custom", there is a checked checkbox. The "Singular Label" field contains "customer Detail". The "Plural Label" field contains "customer Detail". On the right, under "Enable Reports", there are several checked checkboxes: "Track Activities", "Track Field History", and "Deployment Status" which is set to "Deployed". The "Help Settings" section points to "Standard salesforce.com Help Window". At the top right are "Edit" and "Delete" buttons.

ii)Creating Appointments:



The screenshot shows the Salesforce Setup interface for creating a new object. The URL is https://orgfarm-5aea6b3b4a-dev-ed.lightning.force.com/lightning/setup/ObjectManager/01lgL00000238hR/Details/view. The page title is "Appointments". The left sidebar lists various object configuration options: Details, Fields & Relationships, Page Layouts, Lightning Record Pages, Buttons, Links, and Actions, Compact Layouts, Field Sets, Object Limits, Record Types, Related Lookup Filters, Search Layouts, List View Button Layout, Restriction Rules, and Scoping Rules. The main "Details" tab is selected. The "Description" field is empty. The "API Name" field contains "Appointments__c". Under "Custom", there is a checked checkbox. The "Singular Label" field contains "Appointments". The "Plural Label" field contains "Appointments". On the right, under "Enable Reports", there are several checked checkboxes: "Track Activities", "Track Field History", and "Deployment Status" which is set to "Deployed". The "Help Settings" section points to "Standard salesforce.com Help Window". At the top right are "Edit" and "Delete" buttons.

iii)Creating service records:

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Setup, Home, and Object Manager, along with a search bar and various system icons. The main title is "SETUP > OBJECT MANAGER" followed by "Service records". On the left, a sidebar menu lists options like Details, 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 content area is titled "Details" and contains fields for Description, API Name (Service_records_c), Custom (✓), Singular Label (Service records), Plural Label (Service records), Enable Reports (✓), Track Activities (✓), Track Field History (✓), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). At the bottom right are "Edit" and "Delete" buttons.

iv) Creating Billing details and feedback:

The screenshot shows the Salesforce Object Manager interface. The top navigation bar includes links for Setup, Home, and Object Manager, along with a search bar and various system icons. The main title is "SETUP > OBJECT MANAGER" followed by "Billing details and feedback". On the left, a sidebar menu lists options like Details, 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 content area is titled "Details" and contains fields for Description, API Name (Billing_details_and_feedback_c), Custom (✓), Singular Label (Billing details and feedback), Plural Label (Billing details and feedback), Enable Reports (✓), Track Activities (✓), Track Field History (✓), Deployment Status (Deployed), and Help Settings (Standard salesforce.com Help Window). At the bottom right are "Edit" and "Delete" buttons.

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, Fields & Relationships, and Page Layouts. The main panel is titled 'Data Type' and lists several options with descriptions:

- 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 pop-up 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:
 - The relationship field is required on all detail records.
 - The ownership and sharing of a detail record are determined by the master record.
 - When a user deletes the master record, all detail records are deleted.
 - You can create rollup summary fields on the master record to summarize the detail records.The relationship field allows users to click on a lookup icon to select a value from a pop-up 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 pop-up calendar.
- Date/Time**: Allows users to enter a date and time, or pick a date from a pop-up calendar. When users click a date in the pop-up, that date and the current time are entered into the Date/Time field.
- Email**: Allows users to enter an email address, which is validated to ensure proper format. If this field is specified for a contact or lead, users can choose the address when clicking Set

The screenshot shows the Salesforce Setup interface under Object Manager for the Appointments object. The left sidebar shows the 'Fields & Relationships' section. The main panel is titled 'New Custom Field' and is on 'Step 2. Enter the details'. The form fields are as follows:

- Field Label**: Maintenance service
- Default Value**: Unchecked (radio button selected)
- Field Name**: Maintenance_service
- Description**: (empty text area)
- Help Text**: (empty text area)

At the bottom of the step 2 form, there are two checkboxes: 'Auto add to custom report type' (unchecked) and 'Add this field to existing custom report types that contain this entity' (checked). Navigation buttons '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

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

New Lightning App

App Details & Branding

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

App Details

*App Name

*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 View Adoption and Usage Metrics for Lightning Experience 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

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 View Adoption and Usage Metrics for Lightning Experience 9/1/2025, 9:07 PM Lightning ✓

The screenshot shows the 'New Lightning App' setup process. On the left, the navigation sidebar includes sections like 'Salesforce I', 'Data', 'Apps' (selected), 'Customization', 'External Data', and 'Lightning Experience'. Under 'Apps', there are categories for 'Flow Category' and 'Lightning Bolt Solutions'. The main area is titled 'User Profiles' with the sub-instruction 'Choose the user profiles that can access this app.' Below this are two lists: 'Available Profiles' (containing 'Analytics Cloud Integration User', 'Analytics Cloud Security User', 'Anypoint Integration', 'Authenticated Website', 'Authenticated Website', and 'B2B Reordering Portal Buyer Profile') and 'Selected Profiles' (empty, showing 'No Profiles selected'). A progress bar at the bottom indicates the current step is 'User Profiles'. The bottom section displays three app cards: 'Garage Management Application' (Last Modified: 9/7/2025, 9:38 AM, Status: Lightning, Type: App), 'Lightning Usage App' (Last Modified: 9/1/2025, 9:07 PM, Status: Lightning, Type: App), and 'Marketing CRM Classic' (Last Modified: 9/1/2025, 9:07 PM, Status: Classic, Type: App). A 'Save & Finish' button is located in the bottom right corner.

Milestone 5: Fields

i) Creation of fields for the Customer Details object

The screenshot shows the 'Object Manager' interface for the 'customer Detail' object. The left sidebar lists various setup options like 'Page Layouts', 'Lightning Record Pages', 'Buttons, Links, and Actions', etc. The main area is titled 'Fields & Relationships' with the sub-instruction '5 items, Sorted by Field Label'. It displays a table of fields:

FIELD LABEL	FIELD NAME	DATA TYPE	CONTROLLING FIELD	INDEXED
Created By	CreatedById	Lookup(User)		
customer Detail Name	Name	Text(80)		✓
Last Modified By	LastModifiedById	Lookup(User)		
Owner	OwnerId	Lookup(User,Group)		✓
Phone	Phone__c	Phone		

At the top of the main area, there are buttons for 'Quick Find', 'New', 'Deleted Fields', 'Field Dependencies', and 'Set History Tracking'.

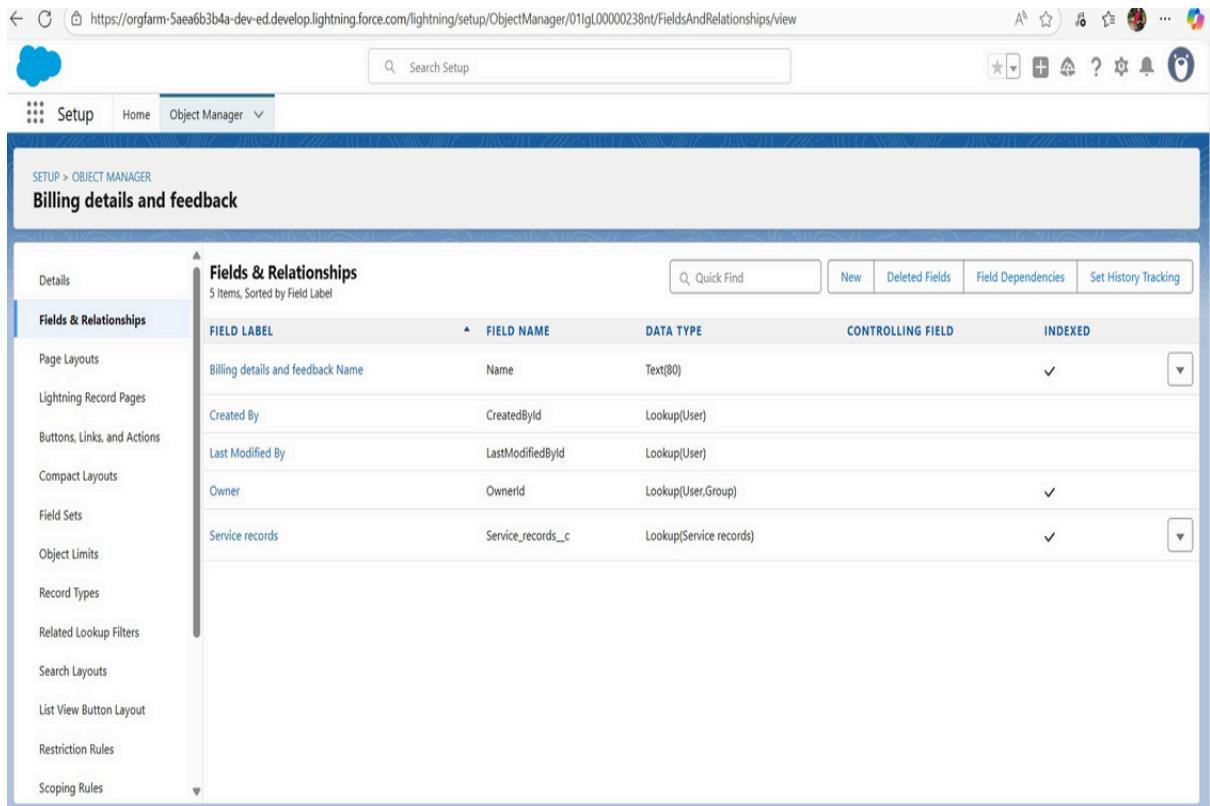
ii) Creation of Lookup Fields

The screenshot shows the Salesforce Setup interface for the Object Manager. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled 'Fields & Relationships' for the 'Appointments' object. It displays five fields: Appointments Name (Name, Text(80)), Created By (CreatedById, Lookup(User)), customer Detail (customer_Detail__c, Lookup(customer Detail)), Last Modified By (LastModifiedById, Lookup(User)), and Owner (OwnerId, Lookup(User,Group)). The 'INDEXED' column for all fields has a checked checkbox.

iii) Creation of Checkbox Fields

The screenshot shows the Salesforce Setup interface for the Object Manager. The left sidebar lists various configuration options like Details, Fields & Relationships, Page Layouts, etc. The main content area is titled 'Fields & Relationships' for the 'Service records' object. It displays six fields: Appointments (Appointments__c, Lookup(Appointments)), Created By (CreatedById, Lookup(User)), Last Modified By (LastModifiedById, Lookup(User)), Owner (OwnerId, Lookup(User,Group)), and Service records Name (Name, Text(80)). The 'INDEXED' column for the 'Service records Name' field has a checked checkbox.

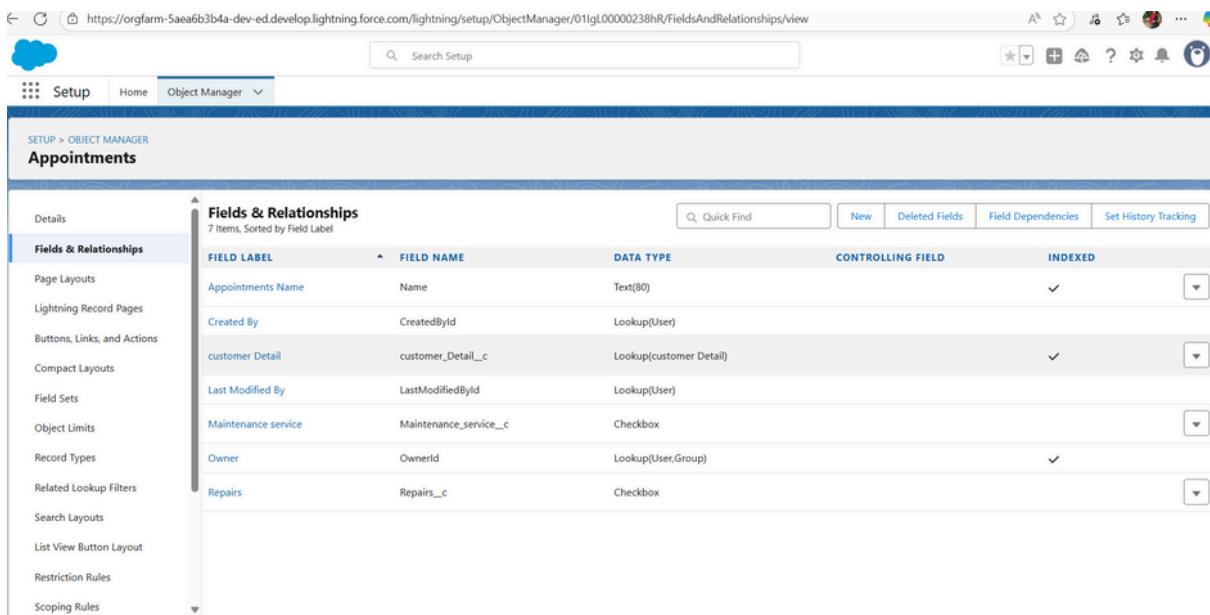
iv)Creation of date Fields



The screenshot shows the Salesforce Object Manager interface. The left sidebar is titled "FIELDS & RELATIONSHIPS" and lists various layout types. The main content area is titled "Fields & Relationships" and shows five items sorted by Field Label. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

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 interface. The left sidebar is titled "FIELDS & RELATIONSHIPS" and lists various layout types. The main content area is titled "Fields & Relationships" and shows seven items sorted by Field Label. The table columns are FIELD LABEL, FIELD NAME, DATA TYPE, CONTROLLING FIELD, and INDEXED.

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 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	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)		✓

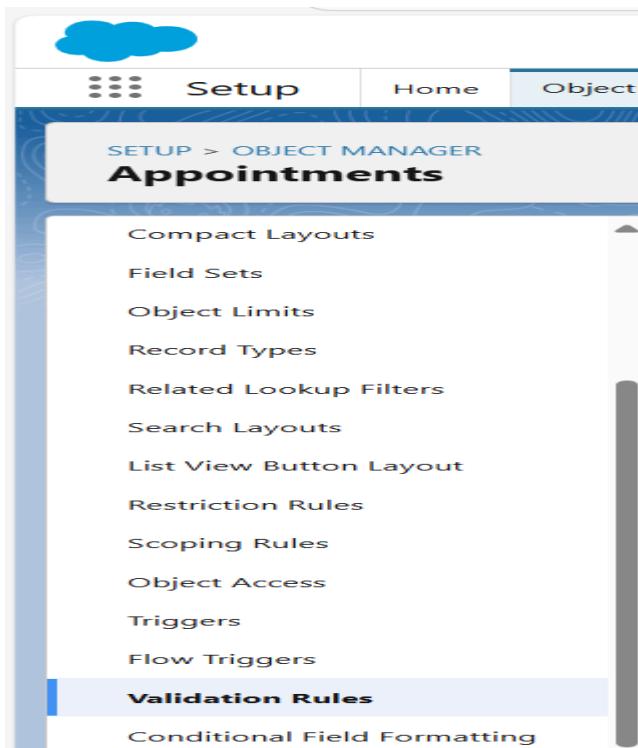
vii)Creating Formula Field in Service records Object

The screenshot shows the Salesforce Object Manager interface for the 'Billing details and feedback' 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
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



This screenshot shows the "Validation Rule Edit" screen for the "Vehicle" object. The left sidebar has the same list of options as the previous screenshot. The main area is titled "Validation Rule Edit" and contains fields for "Rule Name" (set to "Vehicle"), "Active" (checked), and "Description". Below these is the "Error Condition Formula" section, which includes an example formula: "Discount_Percent >0.30" and a note: "Display an error if Discount is more than 30%". It also includes an "Insert Field" button, an "Insert Operator" dropdown, and a large text input field containing the formula: "NOT(REGEX(Vehicle_number_plate__c , "[A-Z]{2}[0-9]{2}[A-Z]{2}[0-9]{4}"))". To the right of the formula input is a "Functions" dropdown menu showing categories like ABS, ACOS, ADDMONTHS, AND, ASCII, ASIN, etc. A "Check Syntax" button and a message "No errors found" are at the bottom of the formula input area. A "Quick Tips" box is visible in the top right corner.

The screenshot shows the Salesforce Object Manager interface for creating a validation rule. At the top, there is a configuration panel for an 'Error Message' with a sample message 'Discount percent cannot exceed 30%' and an error condition formula 'NOT(REGEX(Vehicle_number_plate__c , "[A-Z]{2}(0|9){2}(A-Z){2}(0|9){4}"))'. Below this, the 'Error Message' field contains 'Please enter valid number'. The 'Error Location' is set to 'Field' and 'Vehicle number plate'. The configuration panel includes 'Save', 'Save & New', and 'Cancel' buttons.

Below the configuration panel, the browser address bar shows the URL: <https://orgfarm-5aea6b3b4a-dev-ed.lightning.force.com/lightning/setup/ObjectManager/page?address=%2F03dgL00000QavB>. The page title is 'Object Manager' under 'SETUP'. The main content area displays the 'Appointments Validation Rule' details:

Validation Rule Detail	
Rule Name	Vehicle
Error Condition 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

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 "Data" section. It displays a table of existing matching rules, with one row selected:

Action	Rule Name	Object	Status	Description	Last Modified Date	Last Modified By
Put	Match customer detail	Customer Detail	Active		08/08/2025	Enya Dharshini

Screenshot 2: Matching Rules - New Matching Rule

This screenshot shows the "New Matching Rule" wizard. Step 1: Select object. The "Object" dropdown is set to "Customer Detail".

Screenshot 3: Duplicate Rules - Customer Detail duplicate

This screenshot shows the "Duplicate Rules" page under the "Data" section. It displays the details of a "Customer Detail duplicate" rule:

Duplicate Rule Detail		Operations On Create		Operations On Edit		Matching Criteria	
Rule Name	Description	Object	Record-Level Security	Action On Create	Action On Edit	Alert	Report
Customer Detail duplicate		customer Detail	Enforce sharing rules	Allow	Allow	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
				Action On Create	Action On Edit	Alert	Report
				Allow	Allow	<input type="checkbox"/>	<input type="checkbox"/>
				Alert Text	Use one of these records?		
				Active	<input checked="" type="checkbox"/>		
				Matching Rule	<input checked="" type="checkbox"/> Matching customer details <input checked="" type="checkbox"/> Mapped	(customer Detail: Gmail EXACT MatchBlank = FALSE) AND (customer Detail: Phone EXACT MatchBlank = FALSE)	
Conditions				Created By	Modified By Enya Dharshini, 9/8/2025, 1:17 AM		

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

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'duplic' typed in, and a navigation menu with 'Data' expanded, showing 'Duplicate Management', 'Duplicate Error Logs', 'Duplicate Rules', and 'Matching Rules'. A message says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Customer Detail duplicate' under 'Customer Detail Duplicate Rule'. It shows a table with one row for the rule, with columns for Rule Name (Customer Detail duplicate), Description, 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 (checked), Matching Rule (Matching customer details, Mapped), Operations On Create (Alert checked, Report checked), Operations On Edit (Alert unchecked, Report checked), and Matching Criteria ((customer Detail: Gmail EXACT MatchBlank = FALSE) AND (customer Detail: Phone EXACT MatchBlank = FALSE)). The rule was created by Priya Dharshini on 9/8/2025, 1:17 AM and modified by her on the same date at 1:17 AM.

The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with 'matching rules' typed in, and a navigation menu with 'Data' expanded, showing 'Duplicate Management' and 'Matching Rules'. A message says 'Didn't find what you're looking for? Try using Global Search.' The main content area is titled 'Matching customer details' under 'Matching Rule'. It shows a table with one row for the rule, with columns for Object (customer Detail), Rule Name (Matching customer details), Unique Name (Matching_customer_details), Description, Matching Criteria ((customer Detail: Gmail EXACT MatchBlank = FALSE) AND (customer Detail: Phone EXACT MatchBlank = FALSE)), Status (Inactive), and Created By (Priya Dharshini, 9/8/2025, 1:17 AM). An 'Activate' button is visible. A modal window titled 'Matching Rule Activation' contains the message: '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

The screenshot shows the Salesforce Setup interface with the 'Profiles' tab selected. A modal window titled 'Clone Profile' is open. Inside, there's a field 'Enter the name of the new profile' and a note 'You must select an existing profile to clone from.' Below these are dropdowns for 'Existing Profile' (set to 'Standard User'), 'User License' (set to 'Salesforce'), and 'Profile Name' (set to 'manager'). At the bottom right of the modal are 'Save' and 'Cancel' buttons.

The screenshot shows the 'Profile Detail' page for the 'manager' profile. It includes sections for 'Profile Detail' (Name: manager, User License: Salesforce Platform, Description: null, Created By: Priya Charchini, Modified By: Priya Charchini), 'Page Layouts' (listing assignments for Global, Email Application, Home Page Layout, Account, and Alternative Payment Method), and 'Custom App Settings' (listing Analytics Studio, App Launcher, Garage Management Application, Platform, WDC, and WDC).

The screenshot shows the 'Service Provider Access' and 'Tab Settings' sections. Under 'Service Provider Access', there are sections for 'Platform (standard_Platform)' (Visible checked, Default checked) and 'WDC (standard_Work)' (Visible checked, Default checked). Under 'Tab Settings', there is a section for 'Garage Management Application (Garage_Management_Application)' (Visible checked, Default checked).

Contact Point Emails	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	User External Credentials	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Custom Object Permissions			
Appointments	Basic Access Read <input checked="" type="checkbox"/> Create <input type="checkbox"/> Edit <input type="checkbox"/> Delete <input type="checkbox"/> Data Administration View All Records <input checked="" type="checkbox"/> Modify All Records <input checked="" type="checkbox"/> View All Fields <input type="checkbox"/>	customer Detail	Basic Access Read <input checked="" type="checkbox"/> Create <input type="checkbox"/> Edit <input type="checkbox"/> Delete <input type="checkbox"/> Data Administration View All Records <input checked="" type="checkbox"/> Modify All Records <input checked="" type="checkbox"/> View All Fields <input checked="" type="checkbox"/>
Billing details and feedback	<input checked="" type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/>	Service records	<input checked="" type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/>

Session Settings

ii) sales person Profile

Contact Point Consents	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Streaming Channels	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Contact Point Emails	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	User External Credentials	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Custom Object Permissions			
Appointments	Basic Access Read <input checked="" type="checkbox"/> Create <input type="checkbox"/> Edit <input type="checkbox"/> Delete <input type="checkbox"/> Data Administration View All Records <input checked="" type="checkbox"/> Modify All Records <input checked="" type="checkbox"/> View All Fields <input type="checkbox"/>	customer Detail	Basic Access Read <input checked="" type="checkbox"/> Create <input type="checkbox"/> Edit <input type="checkbox"/> Delete <input type="checkbox"/> Data Administration View All Records <input checked="" type="checkbox"/> Modify All Records <input checked="" type="checkbox"/> View All Fields <input checked="" 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

Session Security Level Required at Login

Password Policies

The screenshot shows the Salesforce Setup interface with the following details:

- URL:** https://orgfarm-5ae6b3b4a-dev-ed.lightning.force.com/lightning/setup/EnhancedProfiles/page?address=%2F00eL000004UCEL%3Fsetupid%3DEnhancedProfiles%26appLayout%3Ds...
- Page Header:** Search Setup
- Left Navigation:** Setup, Home, Object Manager
- Search Bar:** prof
- Current Tab:** Profiles
- Profile Manager:** Manager
- Description:** Users with this profile have the permissions and page layouts listed below. Administrators can change a user's profile by editing that user's personal information.
- Permissions:**
 - Login IP Ranges [0]
 - Enabled Apex Class Access [0]
 - Enabled Visualforce Page Access [0]
 - Enabled External Data Source Access [0]
 - Enabled Named Credential Access [0]
 - Enabled External Credential Principal Access [0]
 - Enabled Custom Metadata Type Access [0]
 - Enabled Custom Setting Definitions Access [0]
 - Enabled Flow Access [0]
 - Enabled Service Presence Status Access [0]
 - Enabled Custom Permissions [0]
- Profile Detail:**

Name	Manager	Custom Profile	<input checked="" type="checkbox"/>
User License	Salesforce		
Description			
Created By	Priya Dharshini	Modified By	Priya Dharshini
	9/8/2025, 1:22 AM		9/8/2025, 1:32 AM
- Page Layouts:**

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

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 shows a hierarchy diagram with three levels:

- Executive Staff:** CEO - President, CFO, VP_Sales.
 - 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
 - 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
 - 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
 - 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:** CA Sales Rep, OR Sales Rep
 - 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
 - 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
 - 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 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 hierarchical tree structure of roles:

- Rathinam college of liberal arts and science (Tip global Kovilpalayam)
 - CEO (Edit | Del | Assign)
 - Add Role
 - CFO (Edit | Del | Assign)
 - Add Role
 - COO (Edit | Del | Assign)
 - Add Role
 - Manager (Edit | Del | Assign)
 - Add Role
 - sales person (Edit | Del | Assign)
 - Add Role
 - SVP.Customer.Service & Support (Edit | Del | Assign)
 - Add Role
 - Customer Support International (Edit | Del | Assign)
 - Add Role
 - Customer Support_North America (Edit | Del | Assign)
 - Add Role
 - Installation & Repair Services (Edit | Del | Assign)
 - Add Role

The screenshot shows the Salesforce Setup interface for creating a new role. The left sidebar lists various roles and teams. The main area is titled "Role Edit" for "New Role". The "Label" field contains "manager", the "Role Name" field contains "manager", and the "This role reports to" field contains "CEO". The "Role Name as displayed on reports" field also contains "manager". Buttons for "Save", "Save & New", and "Cancel" are at the bottom.

Below this, another screenshot shows the "Users" section under "Roles". It displays a table for the "Manager" role, which has one user assigned: Priya Dharshini. The table includes columns for Label, Manager, Role Name, and Manager. A link "Users in Manager Role Help" is at the bottom.

ii)Creating another roles

The image displays two screenshots of the Salesforce Setup interface, illustrating the creation and management of roles.

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

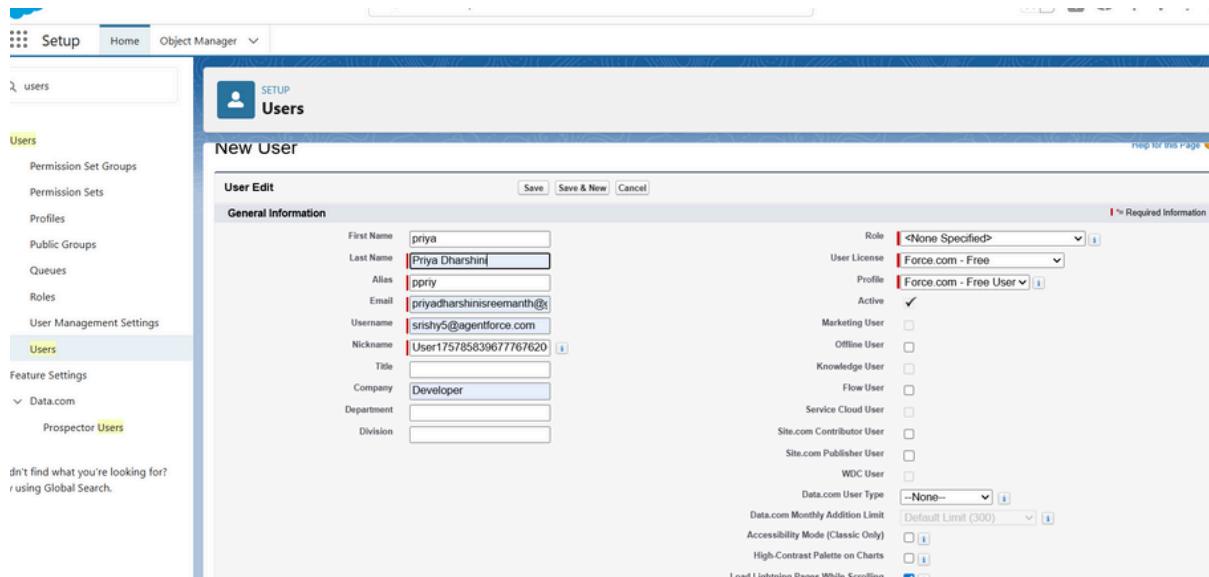
Screenshot 2: sales_person Role Details

This screenshot shows the details for the **sales_person** role. The sidebar shows the user is viewing the **Roles** section under **Users**. The main content area includes:

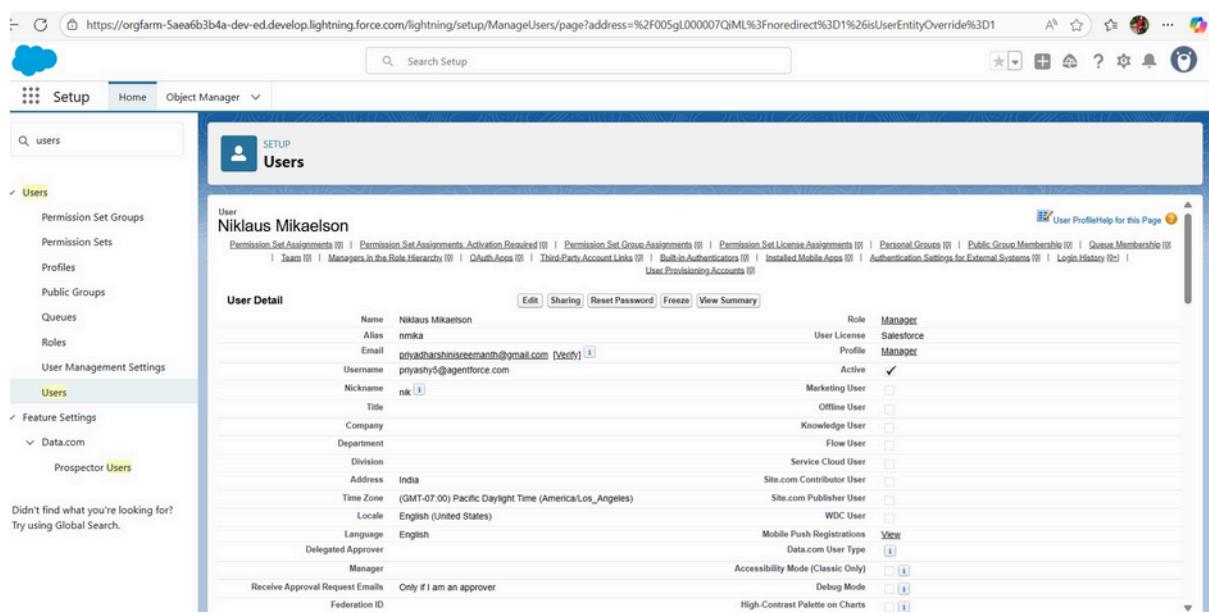
- Role Detail** for **sales person**. Fields include:
 - Label**: sales person
 - This role reports to**: Manager
 - Modified by**: Priya Dharshini, 9/8/2025, 1:50 AM
 - Opportunity Access**: Users in this role can edit all opportunities associated with accounts that they own, regardless of who owns the opportunities
 - Case Access**: Users in this role can edit all cases associated with accounts that they own, regardless of who owns the cases
- Users in sales person Role**: A table with no records displayed.
- Role Name**: sales_person
- Role Name as displayed on reports**: sales_person
- Sharing Groups**: None
- Role, Role and Internal Subordinates**: None

Milestone 10: Users

i) Create User

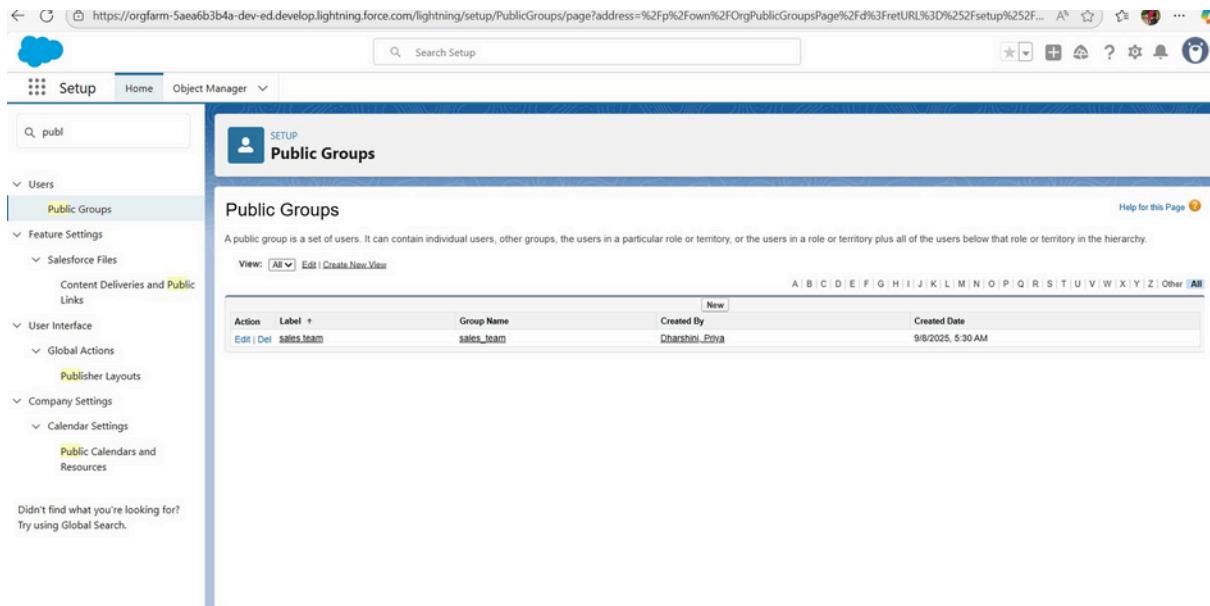


ii) creating another users



Milestone 11: Public groups

i)Creating New Public Group



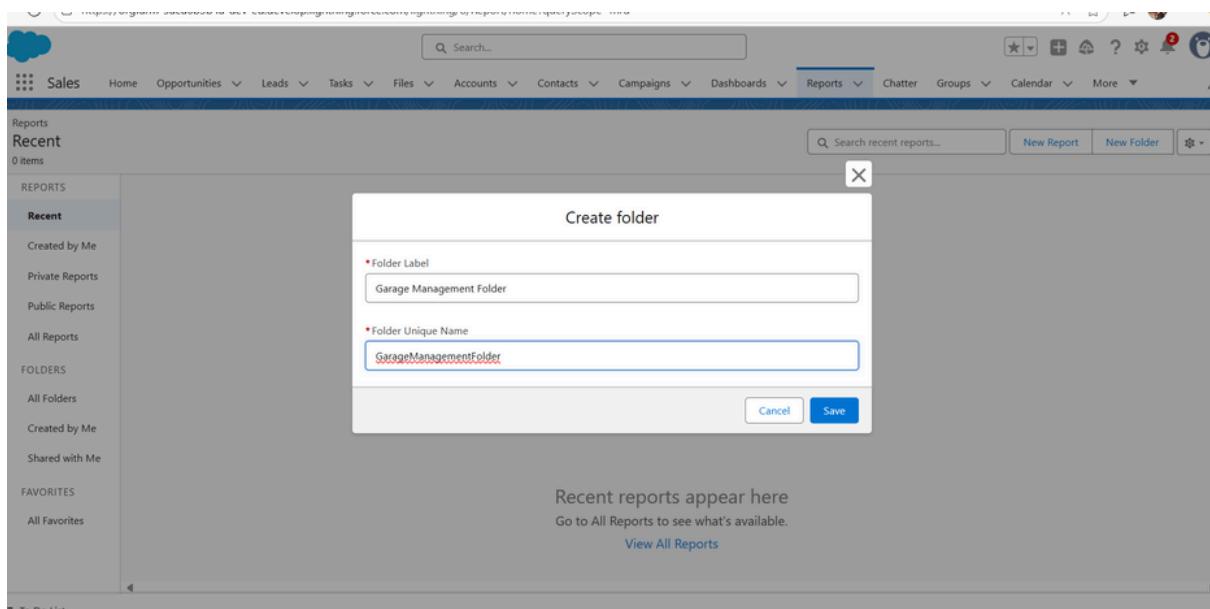
The screenshot shows the Salesforce Setup interface with the search bar set to "publ". The left sidebar is expanded, showing categories like Users, Feature Settings, User Interface, Company Settings, and Reports. Under Reports, "Public Groups" is selected. The main content area is titled "Public Groups" and contains a table 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

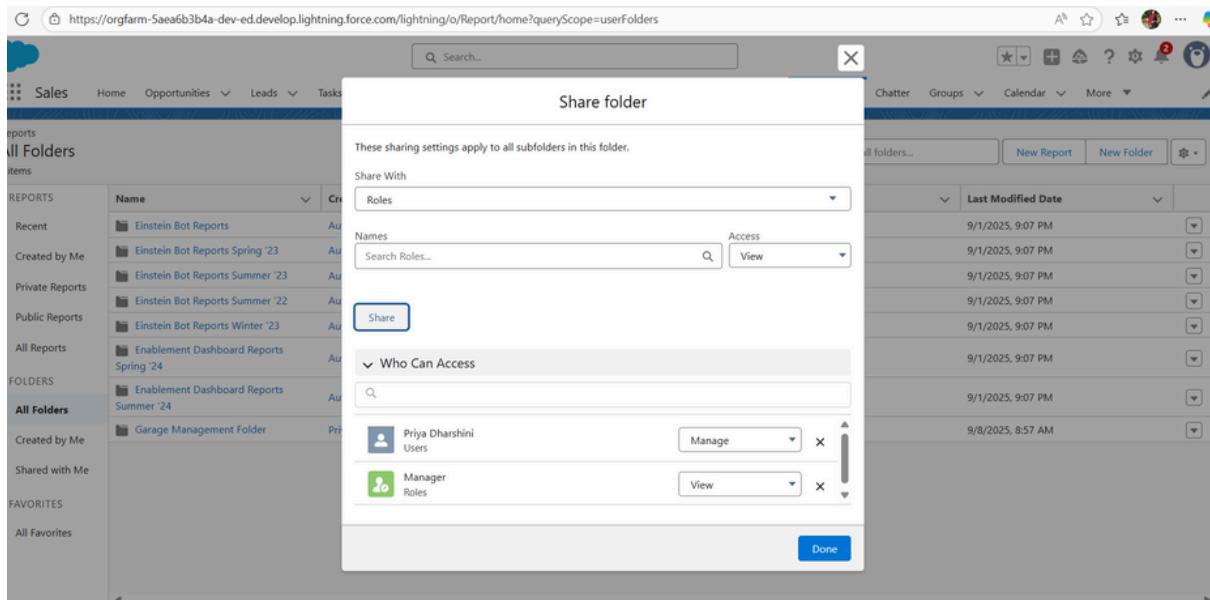
i)Creating Sharing settings



The screenshot shows the Salesforce Reports interface. A modal window titled "Create folder" is open, prompting for a "Folder Label" (set to "Garage Management Folder") and a "Folder Unique Name" (set to "GarageManagementFolder"). The background shows a sidebar with categories like Reports, Folders, and Favorites, and a main area displaying recent reports.



The folder named Garage Management Folder was created.



Milestone 13: Flows

i) Create a Flow

The screenshot shows the Salesforce Setup interface. The left sidebar is expanded, showing categories like Apps, Einstein, Process Automation, and Workflow Actions. Under "Workflow Actions", the "Flows" category is selected. The main content area is titled "Flows" and shows a table of "Flow Definitions". The table includes columns for "Flow Label", "Process Type", "Active", "Tem...", "Package State", "Pack...", "Last Modifi...", and "Last Modified D...". The table lists several flows, such as "Add or Modify Service Appointment Attendees" (Salesforce Scheduler Flow), "Approvals Workflow: Evaluate Approval Requests" (Screen Flow), and "Authentication Provider User Registration" (Identity User Registration Flow). The "Approvals Workflow: Evaluate Approval Requests" flow is currently active.

Flow Builder

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, an...
[Screen Flow](#)
- Schedule-Triggered Flow**: Launches at a specified time and frequency for each record in a batch. This autolaunched flow runs in the...
[Schedule-Triggered Flow](#)
- Autolaunched Flow (No Trigger)**: Launches when invoked by Apex, processes, REST API, and more. This autolaunched flow runs in the...
[Autolaunched Flow \(No Trigger\)](#)

[View All >](#)

Flow Builder

Record-Triggered Flow

Start

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

[+ Add Scheduled Paths \(Optional\)](#)
[Open Flow Trigger Explorer for Billing ...](#)

Run Immediately

End

Configure Start

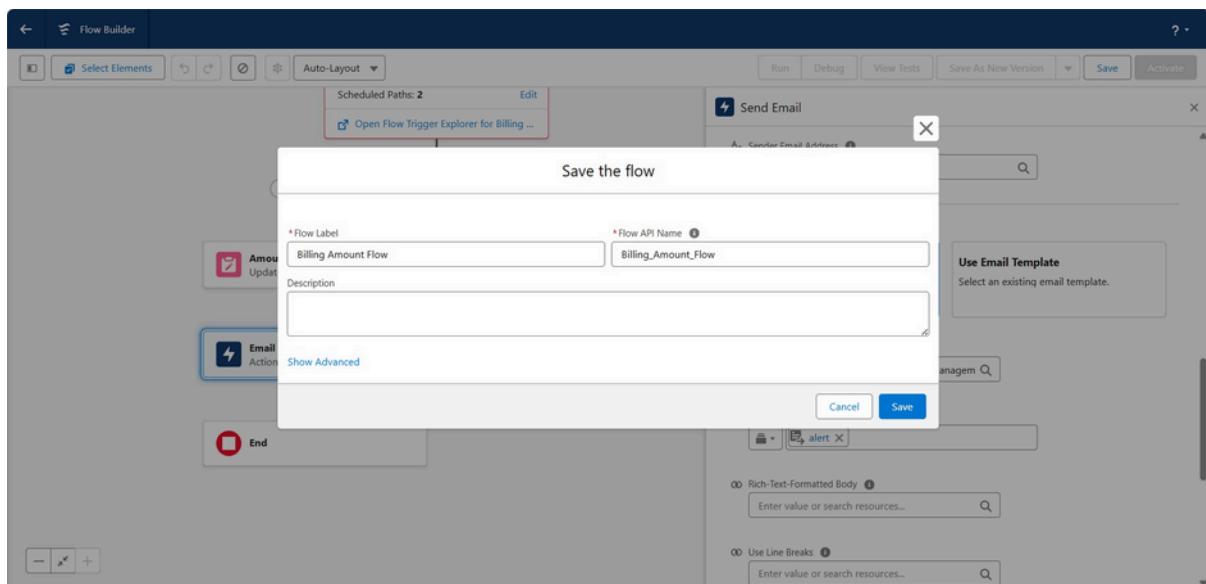
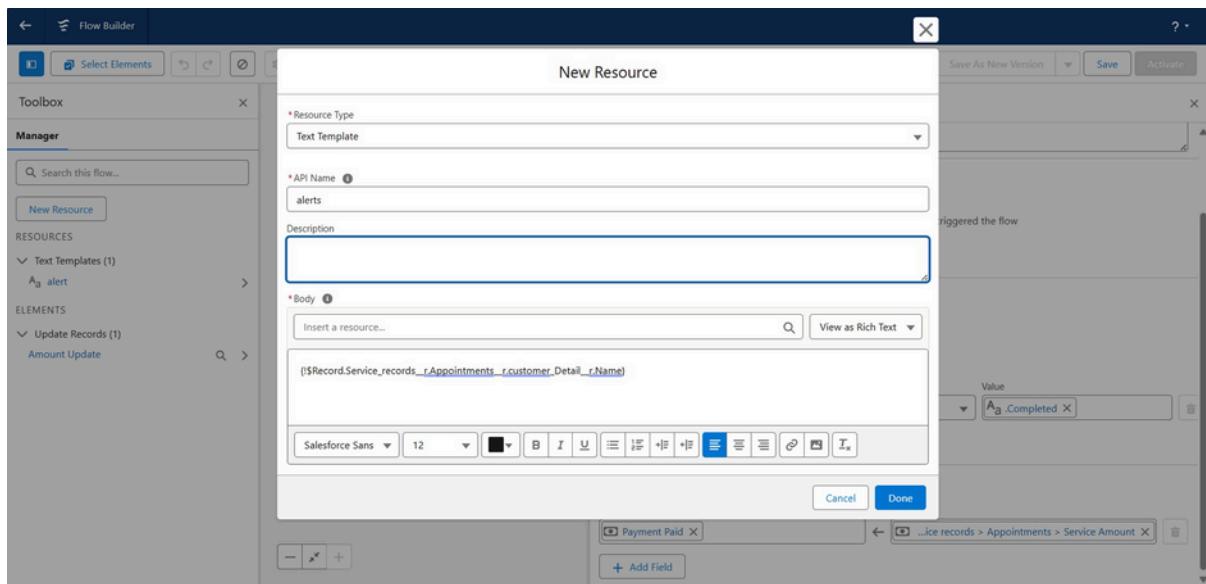
Set Entry Conditions
 Specify entry conditions to reduce the number of records that trigger the flow and the number of times the flow is executed. Minimizing unnecessary flow executions helps to conserve your org's resources.
 If you create a flow that's triggered when a record is updated, we recommend 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.

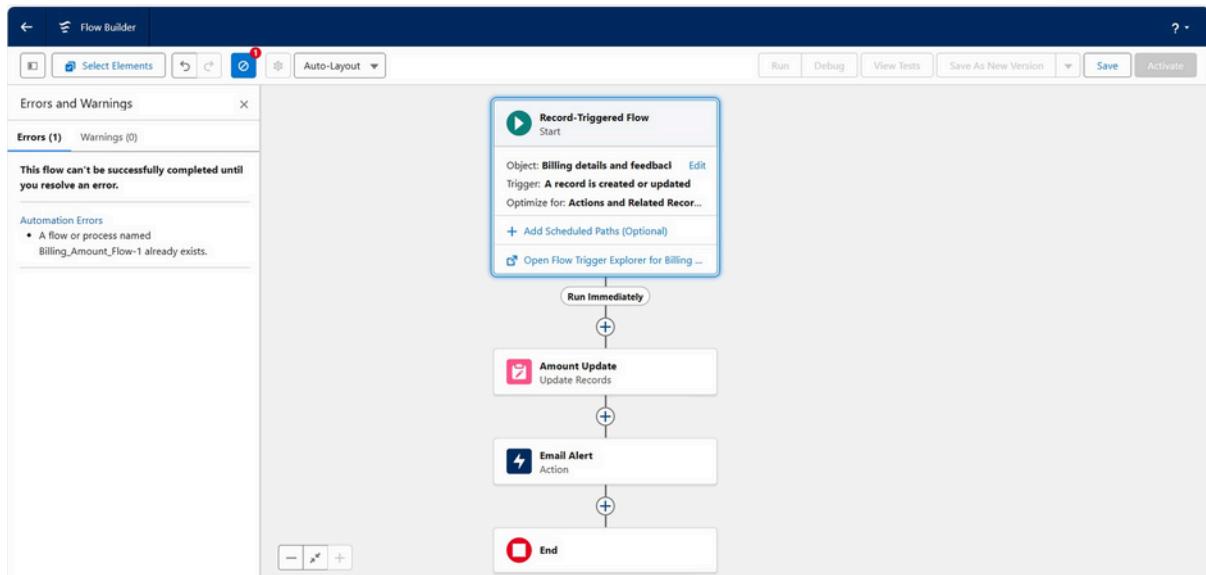
Condition Requirements
 None

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	Package State	Last Modified Date	Last Modified By
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.

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**

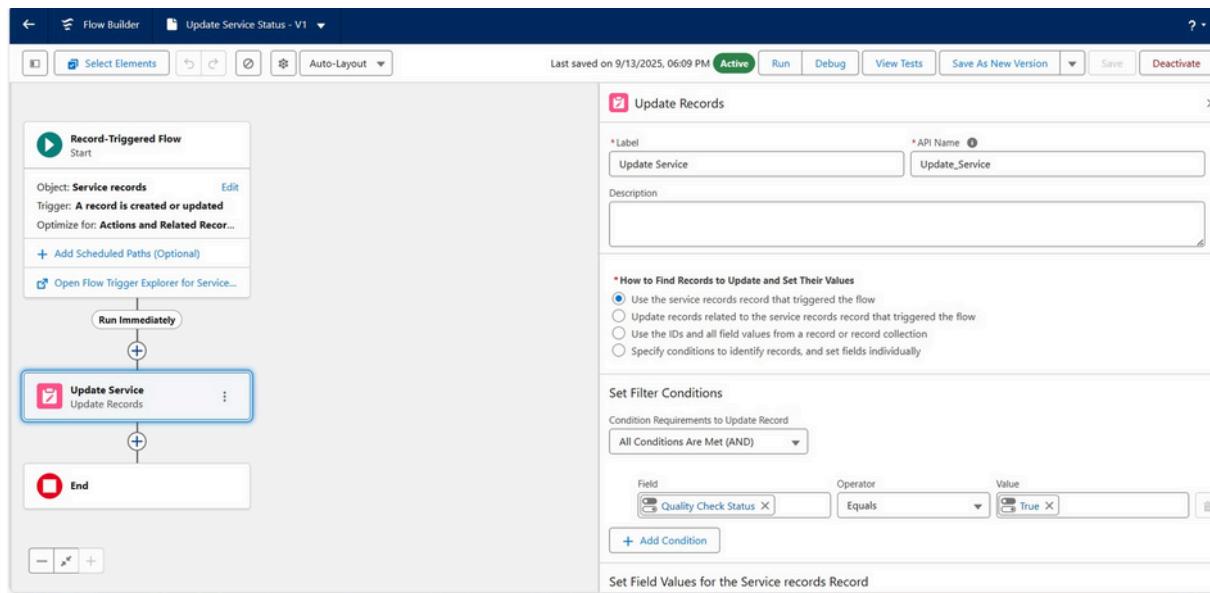
***Flow API Name** ⓘ

Description

[Show Advanced](#)

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

All Conditions Are Met (AND) ▾



Milestone 14: Apex trigger

i) Apex handler

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

```

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;
        }
    }
}

```

Logs Tests Checkpoints Query Editor View State Progress Problems

New Apex Trigger

Name:	AmountDistribution
sObject:	Appointments__c

Submit

The screenshot shows the Force.com IDE interface with the following details:

- Menu Bar:** File, Edit, Debug, Test, Workspace, Help.
- Toolbar:** Code Coverage: None, API Version: 64.
- Code Editor:** The file is named `AmountDistributionHandler.apxc`. The code implements a class `AmountDistributionHandler` with a static method `amountDist` that processes a list of `Appointments__c` records. It checks if three specific service types are true and sets the `Service_Amount__c` field to 10000. If either the Maintenance Service or Repairs are true, it also sets the `Service_Amount__c` field to 10000.
- Status Bar:** Shows the tabs Logs, Tests, Checkpoints, Query Editor, View State, Progress, and Problems, with Problems being the active tab.

```
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 == true){  
20            app.Service_Amount__c = 10000;  
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 = 10000;  
33     }  
34  
35     else if(app.Replacement_Parts__c == true){  
36         app.Service_Amount__c = 12000;  
37     }
```

Logs Tests Checkpoints Query Editor View State Progress Problems

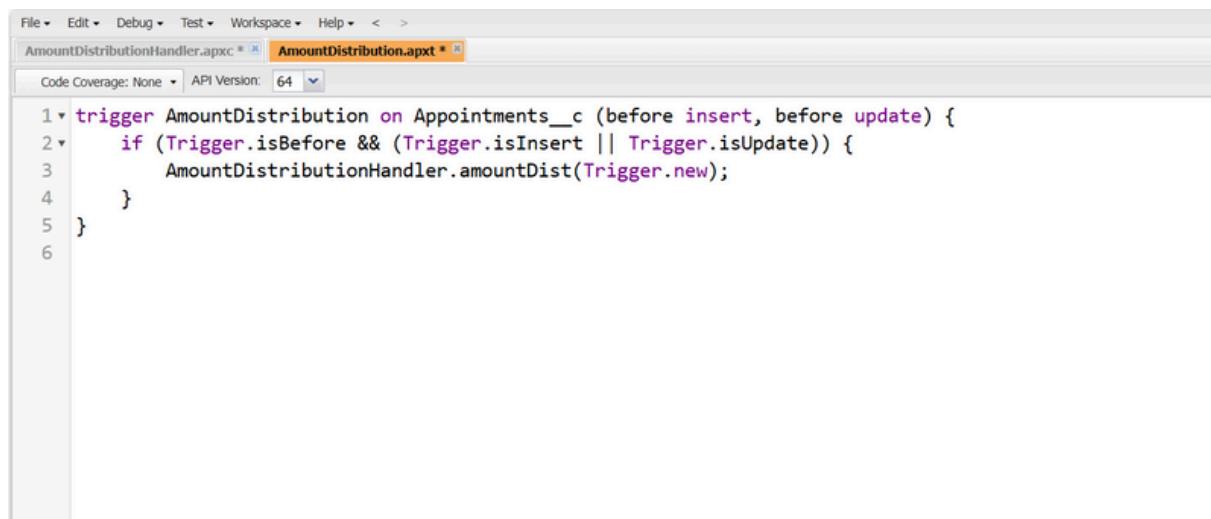
Name	Line	Problem



```
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

Line Problem



```
File Edit Debug Test Workspace Help < >
AmountDistributionHandler.apxc * AmountDistribution.apxt *
Code Coverage: None API Version: 64
1 trigger AmountDistribution on Appointments__c (before insert, before update) {
2     if (Trigger.isBefore && (Trigger.isInsert || Trigger.isUpdate)) {
3         AmountDistributionHandler.amountDist(Trigger.new);
4     }
5 }
6
```

CODE FOR APEX CLASS:

```
public class AmountDistributionHandler {  
  
    public static void amountDist(list<Appointments__c> listApp){  
  
        list<Service_records__c> serList = new list <Service_records__c>();  
  
        for(Appointments__c app : listApp){  
  
            if(app.Maintenance_service__c == true && app.Repairs__c == true &&  
                app.Replacement_Parts__c == true){  
                app.Service_Amount__c = 10000;  
            }  
  
            else if(app.Maintenance_service__c == true && app.Repairs__c == true){  
                app.Service_Amount__c = 5000;  
  
            }  
  
            else if(app.Maintenance_service__c == true && app.Replacement_Parts__c == true){  
                app.Service_Amount__c = 8000;  
  
            }  
  
            else if(app.Repairs__c == true && app.Replacement_Parts__c == true){  
                app.Service_Amount__c = 7000;  
            }  
  
            else if(app.Maintenance_service__c == true){  
                app.Service_Amount__c = 2000;  
            }  
  
            else if(app.Repairs__c == true){  
  
                app.Service_Amount__c = 3000;  
            }  
        }  
    }  
}
```

```

    }

    else if(app.Replacement_Parts__c == true){

        app.Service_Amount__c = 5000;

    }

}

```

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

```

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

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

    AmountDistributionHandler.amountDist(Trigger.new);

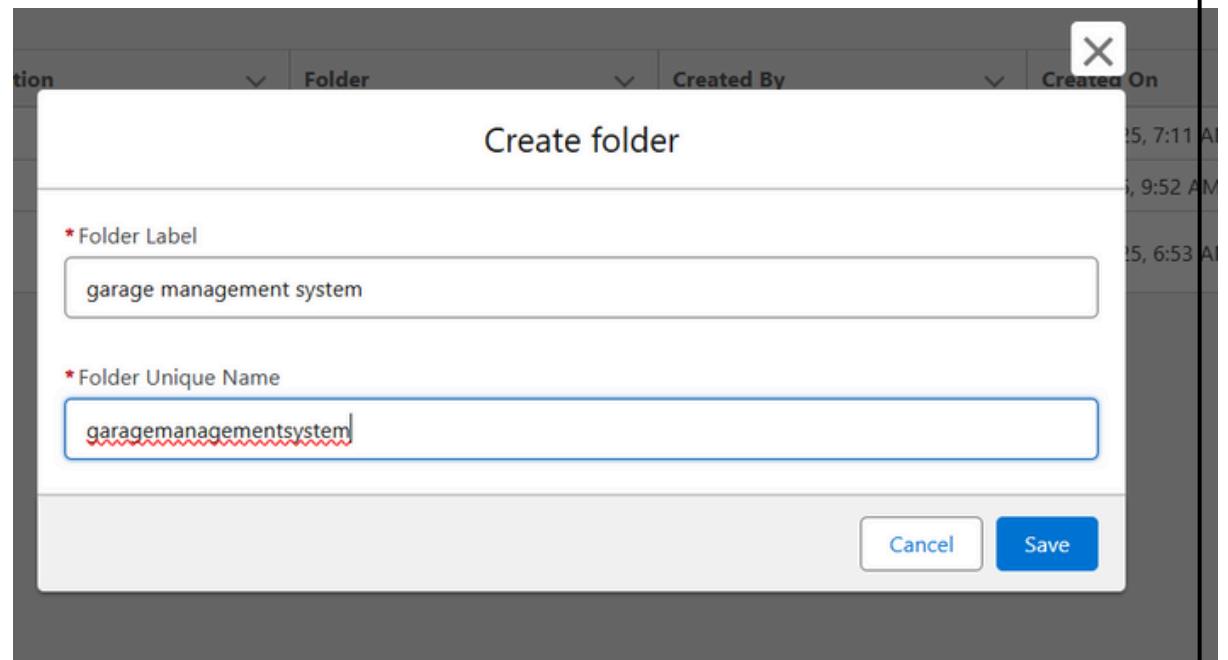
}

}

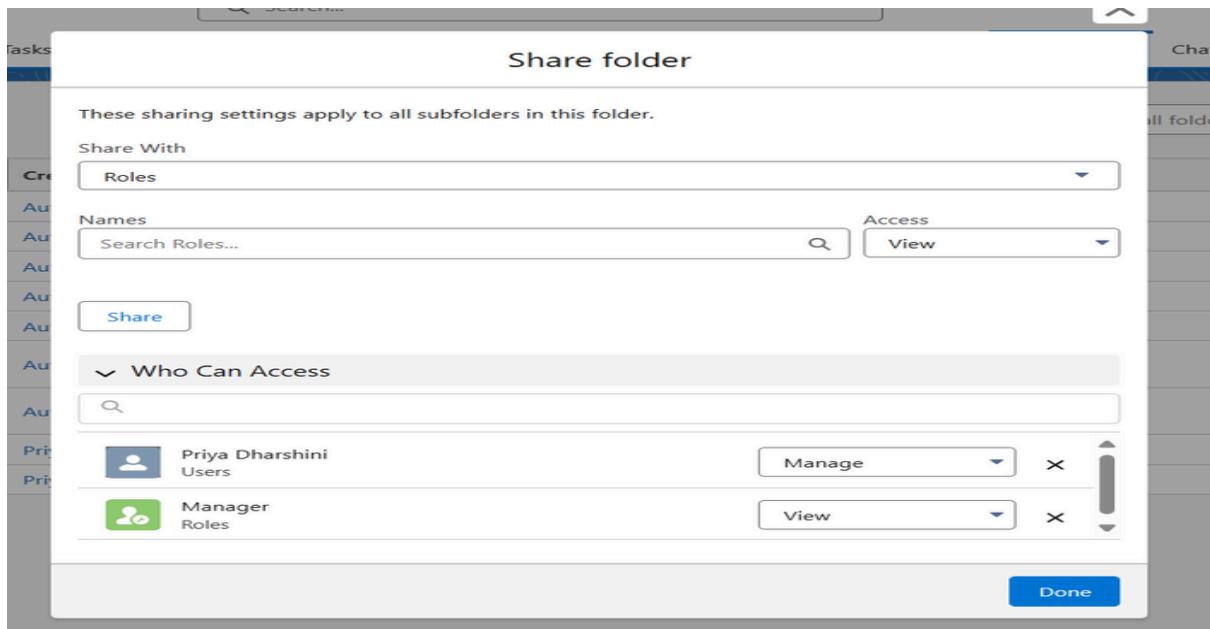
```

Milestone 15: Reports

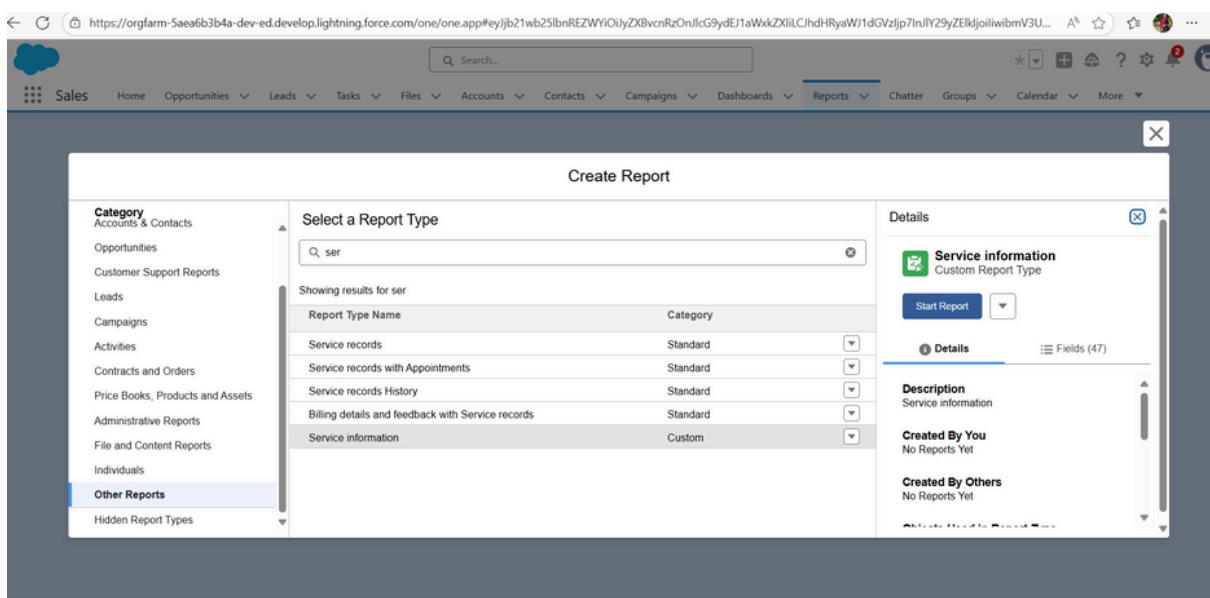
i)create a report folder



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

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

customer Detail Name Appointments Name Service records Name Billing details and feedback Name 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.

Outline Filters

Groups GROUP ROWS Add group... Q

Columns Add column... Q

Customer Detail Name X

Appointments Name X

Service records Name X

Billing details and feedback Name X

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

REPORT New Service information Report Service information

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

FIELDS

- Groups
 - GROUP ROWS Add group...
 - Rating for service Add group...
 - GROUP COLUMNS Add group...
 - Payment Status
- Columns
 - Add column...
 - customer Detail Name
 - Appointment Date
 - Service Status
 - # Payment Paid

Rating for service Payment Status → Completed Total

	Sum of Payment Paid Record Count	\$300	\$300
3	Sum of Payment Paid Record Count	1	1
4	Sum of Payment Paid Record Count	\$1,038	\$1,038
5	Sum of Payment Paid Record Count	\$963	\$963
Total	Sum of Payment Paid Record Count	\$2,301	\$2,301

Details (5 Rows) Click an intersection in the table above to filter details.

	customer Detail Name	Appointment Date	Service Status	Payment Paid
1	Priya	9/10/2025	Completed.	\$300
2	Priya	9/10/2025	Completed.	\$452
3	Priya	9/10/2025	Completed.	\$586
4	Priya	9/10/2025	Completed.	\$463
5	Priya	9/10/2025	Completed.	\$500

Row Counts Detail Rows Grand Total Stacked Summaries Conditional Formatting

To Do List

Update Preview Automatically

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

Report Service information

Save Report As

* Report Name

Report Unique Name

Report Description

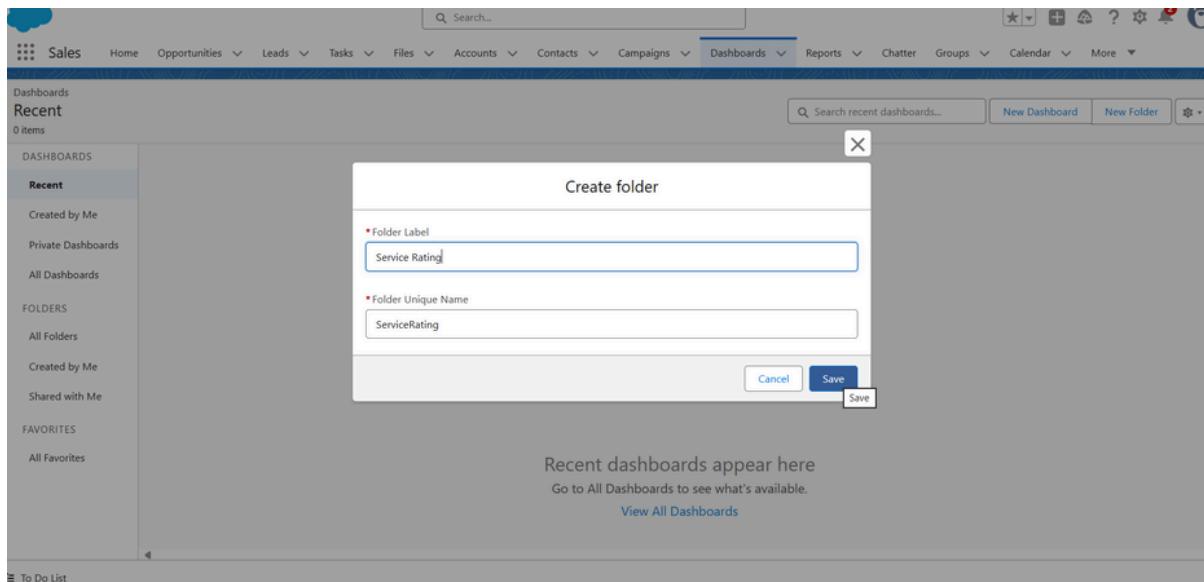
Folder Select Folder

Cancel **Save**

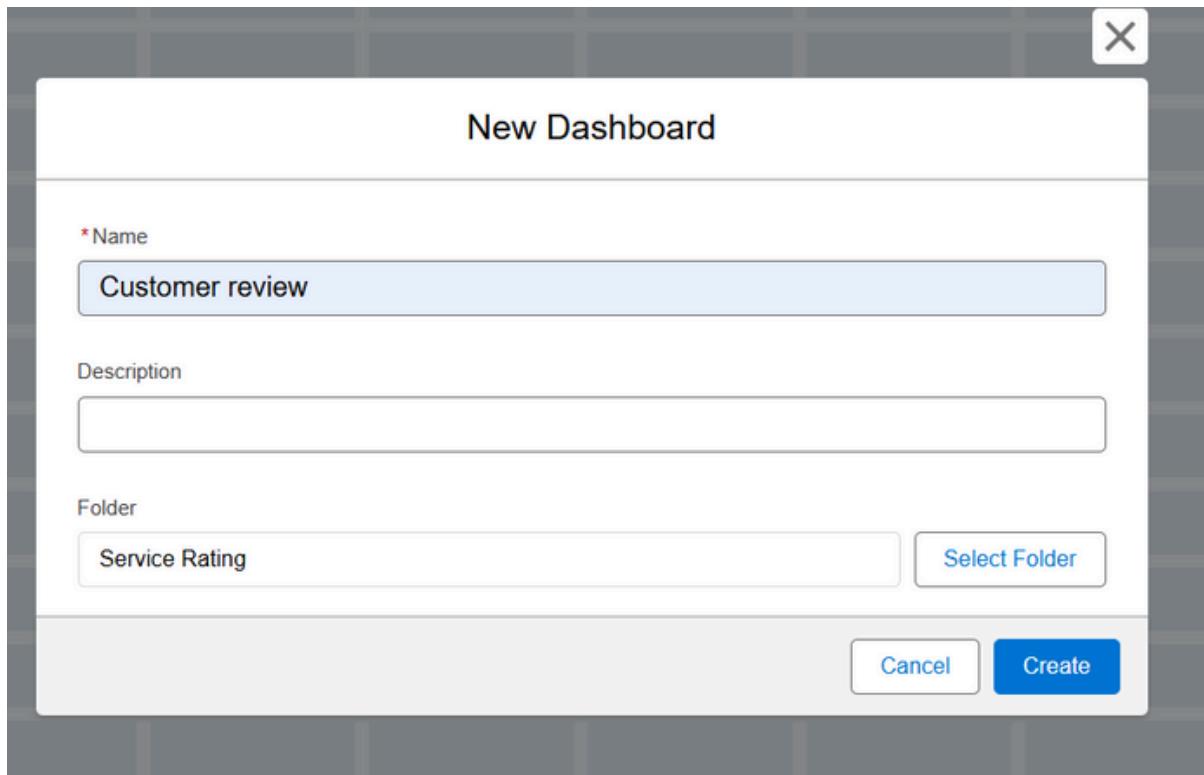
The background shows a preview of the report data, identical to the one in the first screenshot.

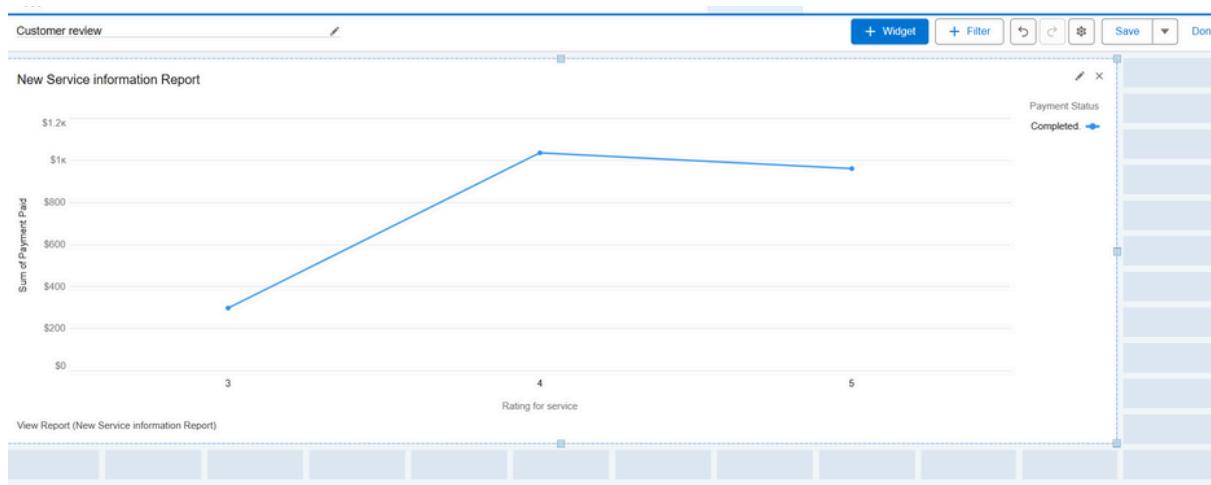
Milestone 16: Dashboards

i) Create Dashboard Folder



ii) Create Dashboard





Search...

Edit Subscription

Schedule dashboard refreshes and subscribe to receive results.

Settings

Frequency

- Daily
- Weekly
- Monthly

Days

- Sun
- Mon
- Tue
- Wed
- Thu
- Fri
- Sat

Time

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

The screenshot shows the 'Garage Management' software interface. The top navigation bar includes links for 'customer Detail', 'Appointments', 'Service records', 'Billing details and feedback', 'Reports', and 'Dashboards'. The main content area displays a 'customer Detail' record for 'mac'. The 'Details' tab is selected, showing fields such as 'customer Detail Name' (mac), 'Phone' ((567) 876-5567), 'Gmail' (mac@gmail.com), 'Created By' (Priya Dharshini, 9/10/2025, 9:26 AM), 'Owner' (Priya Dharshini), and 'Last Modified By' (Priya Dharshini, 9/10/2025, 9:26 AM). To the right, there is an 'Activity' section with a grid of icons for different actions like New Contact, Edit, and New Opportunity. A message indicates 'No activities to show.' and 'Get started by sending an email, scheduling a task, and more.'

The screenshot shows the 'Garage Management' software interface. The top navigation bar includes links for 'customer Detail', 'Appointments', 'Service records', 'Billing details and feedback', 'Reports', and 'Dashboards'. The main content area displays an 'Appointments' record for 'Appointment #001'. The 'Details' tab is selected, showing fields such as '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. Below the form, it says 'Last Modified By' (Priya Dharshini, 9/10/2025, 9:31 AM). To the right, there is an 'Activity' section with a grid of icons for different actions like New Contact, Edit, and New Opportunity. A message indicates 'No activities to show.' and 'Get started by sending an email, scheduling a task, and more.'

New Service records

* = Required Information

Information

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

Buttons: Cancel, Save & New, Save

https://virginia-jade-0004-dev-ed.my.salesforce.com/lightning/s/service_records/_/a0Yg0V0000jPQzAT/view

Garage Management

Service records
ser-109

Details

Service records Name ser-109	Owner 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 Priya Dharshini , 9/10/2025, 9:36 AM	Last Modified By Priya Dharshini , 9/10/2025, 9:37 AM

Advantages:

- ☐Centralized customer and service data.**
 - ☐Automated reminders and workflows.**
 - ☐Real-time reporting and analytics.**
 - ☐Scalable for growing businesses.**
 - ☐Mobile access and system integration.**
 - ☐Better customer communication.**
-

Disadvantages:

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



Conclusion:

Salesforce-based Garage Management Systems offer powerful tools for automation and growth, ideal for medium to large garages. However, small garages may find it too costly or complex for their needs.